

France
November | December 2014

DBCI

The pulse of the Digital Signage
and DooH industry

OVAB Digital Signage & DooH
Business Climate Index

Cooperation Partner France

 Club du
Digital
Media

invidis research
2014 FR 600


invidis
CONSULTING

 DBCI - Introduction

- The OVAB Europe **Digital Signage Business Climate Index (DBCI)** is the leading European indicator of the economic development of the Digital Signage and Digital-out-of-Home industry
- It is polled every two months by invidis consulting in cooperation with OVAB Europe
- Questions:
 - Current business situation: “good”, “satisfactory” or “poor”
 - Expectations for the next six months: “more favorable”, “unchanged” or “more unfavorable”
- **France** – first poll November/December 2014:
 - France is the 3rd largest market for Digital Signage in Europe
 - DBCI France: **41,70 base points**
 - Over **55%** expect a **more favorable** business situation within the next six months
 - Less than **5%** have a **negative outlook** for the industry



Source: TMM

Share	Market	Growth ^{*)}
22%	DE AT CH	>30%
16%	UK IE	>10%
12%	FR	>10%
10%	DK NO SE FI	>20%
8%	BE NL LU	>5%

1) Yoy 2012/13

Source Meko

 Positive business sentiment and good expectations in France

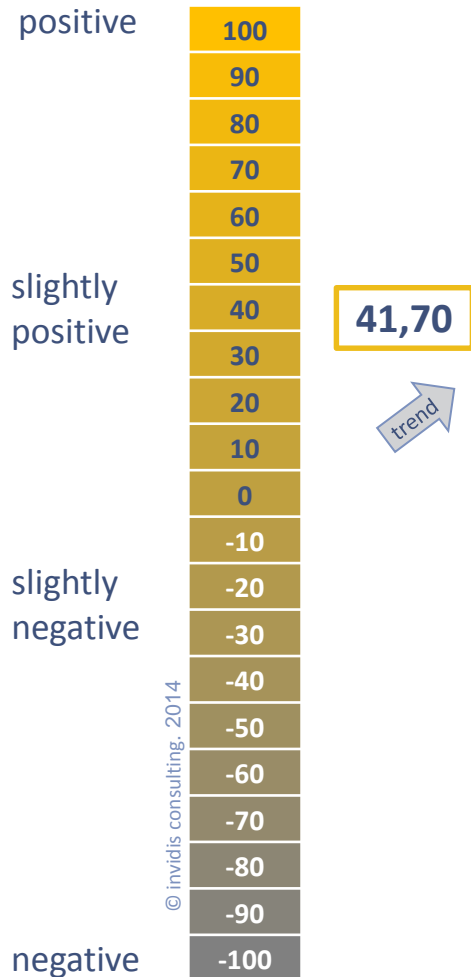


Fig. 1: DBCI France
November/December 2014, n=62

- The digital Signage Business Climate Index France has been polled for the first time in 2014. The Index stands at 41,70 base points, reflecting the current slightly positive business sentiment of the Digital Signage industry in France
- 90% of the polled companies are satisfied or rate their current business climate positive.
- The Digital Signage and DooH market experienced a steady growth over the full year 2013 and a strong year-on-year showing of the first three quarters in 2014.
- With 55% more favorable expectations for the next six months the market participants are expecting a definite opportunity for their business in the new year. Particularly the demand for quality shop window signage in the retail sector can be satisfied with the now widely available sunlight readable displays.

Survey facts

- Participants: n=62
- Region: France
- Time frame: 2014 calendar weeks 44-45

 High satisfaction with the current business situation

Question: How do you rate the current business situation for your products / services in the field of Digital Signage?

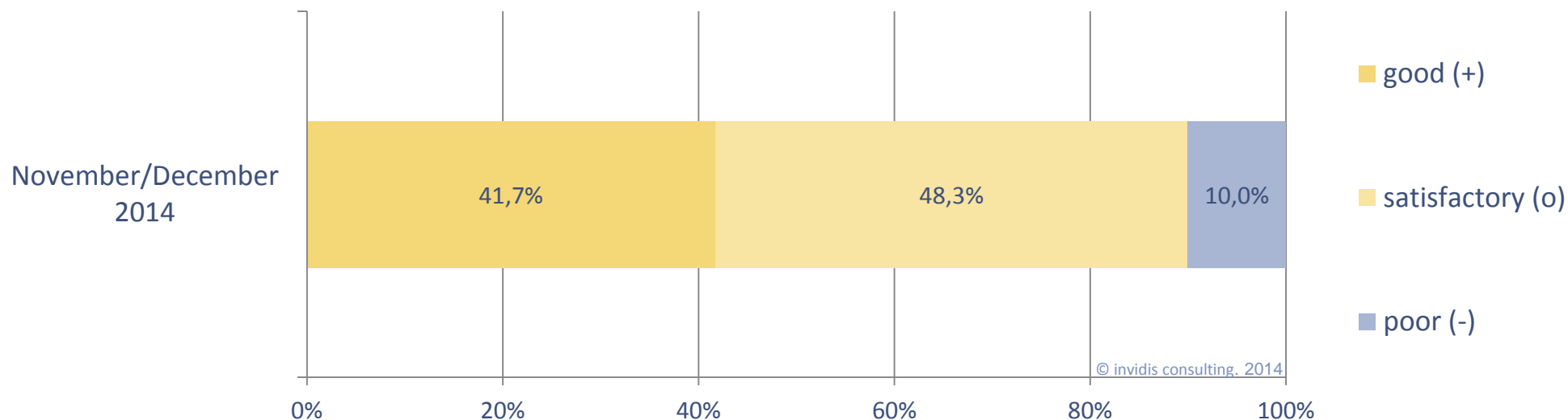


Fig. 2: DBCI France November/December 2014 "business situation", n=62

 Very good expectations in the industry for the new year

Question: What are your expectations for the next six months?

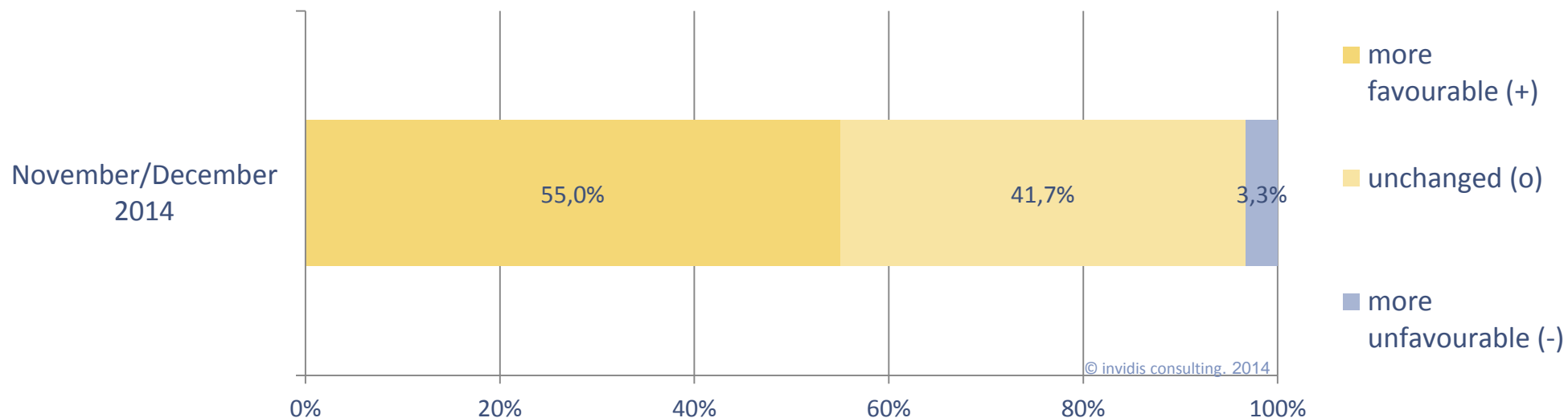


Fig. 3: DBCI France November/December 2014 "business expectations", n=62



Positive business sentiment dominates in all European markets (I)

DBCI – Results September/October 2014 (France: November/December 2014)

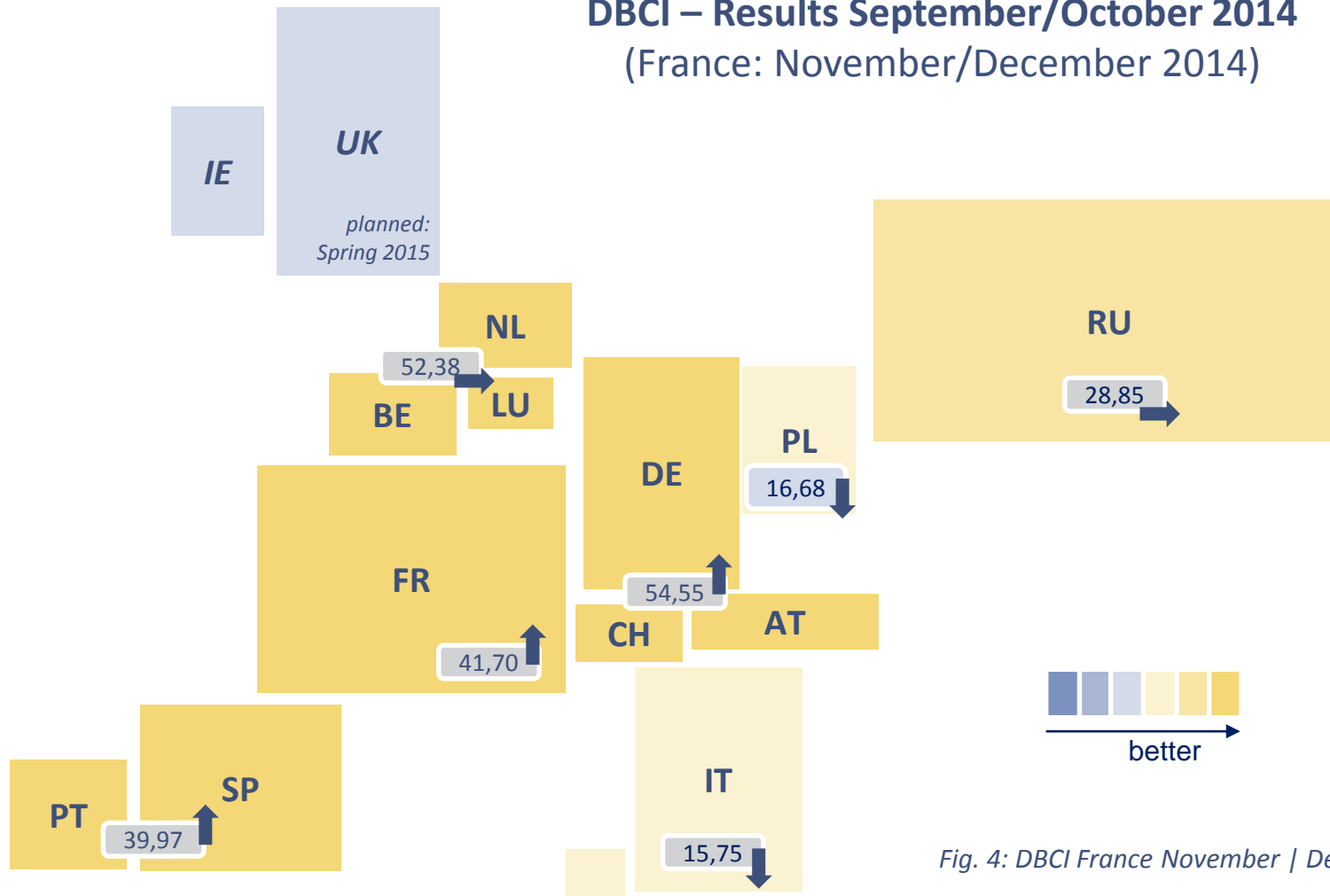


Fig. 4: DBCI France November | December 2014 „DBCI Europe“



Positive business sentiment dominates in all European markets (II)

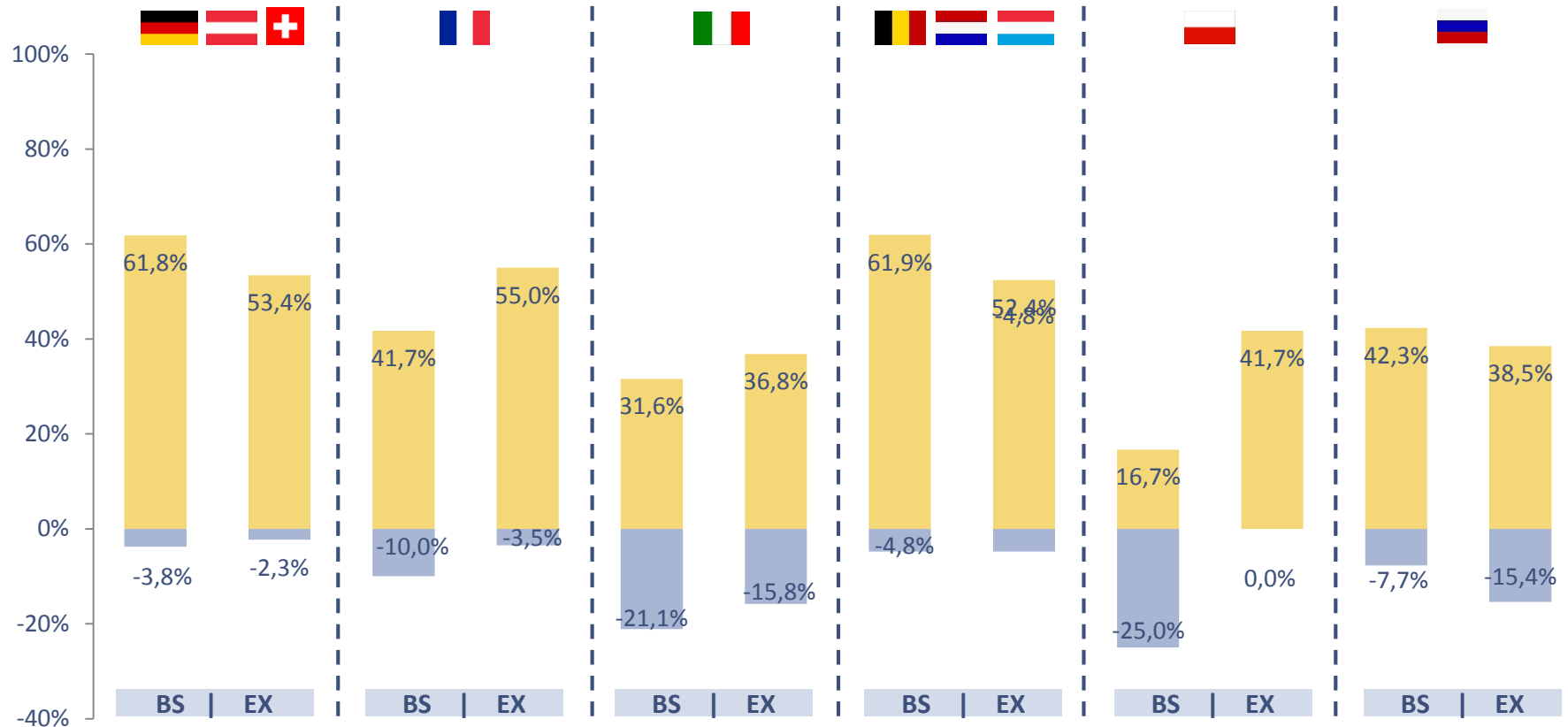


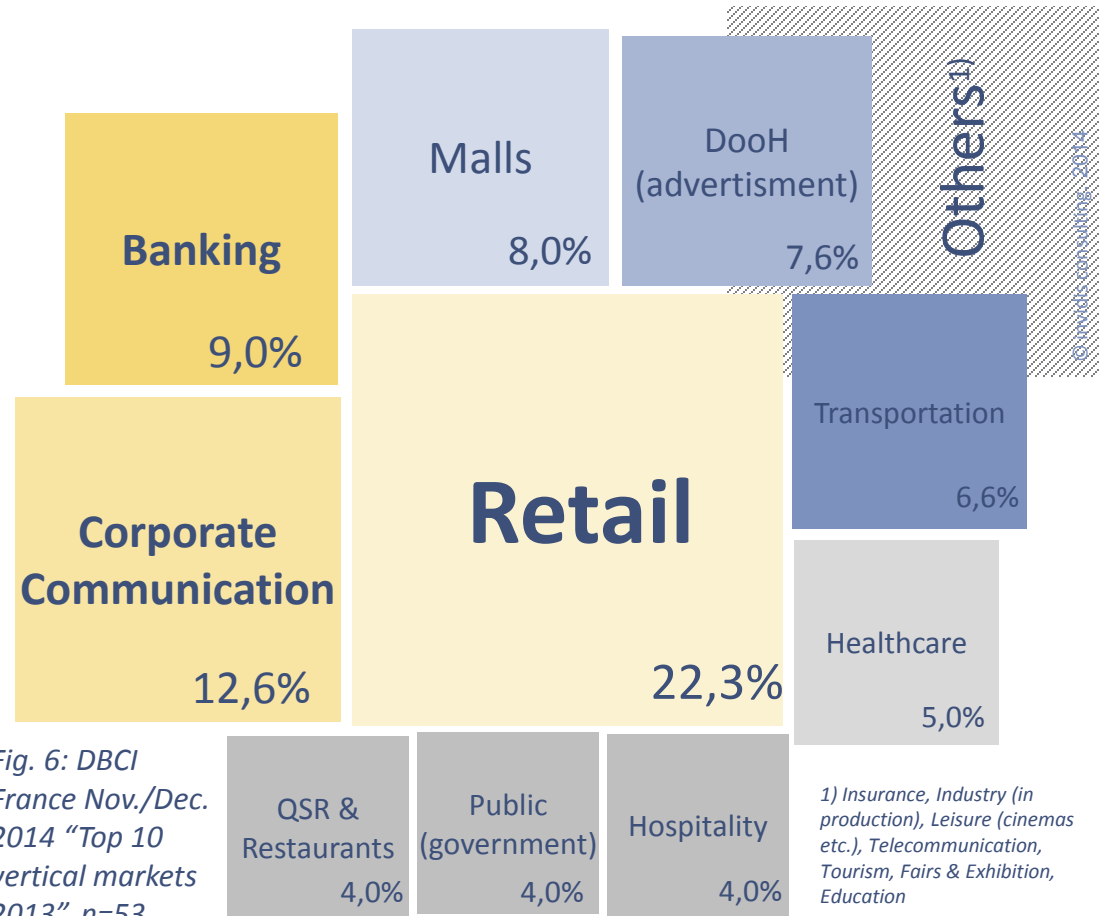
Fig. 5: DBCI France November | December 2014 „Business Situation and Expectations Europe (September/October)“

*) BS: Business Situation; EX: Expectations

Retail is the most significant market for the Digital Signage industry

Question: We would like to assess the dynamic for Digital Signage in the different vertical markets. In which vertical markets has your company realised the most projects in 2013? Please rate the Top 3 vertical markets?

- Retail is with approx. 22,3% of all Digital Signage revenues the biggest vertical market. Customer engagement, marketing and ambient installations become more and more common not only in most high-street retailers, but also in small and medium businesses. Important trends are the direct integration of signage in the shop furnishing and the high demand for shop window signage
- The corporate communication vertical market has grown exponentially over the last few years. The digitization of employee communications is now seen as a sustainable investment by many companies. Now networks with up to 300 displays will be more and more common
- Banking is the third biggest vertical market. The trend towards the digitalization of the communication in the local branches will lead to networks with up to 1.000 displays



FR Retail & Malls will be the most successful locations for DooH in 2015

Question: Which locations will be the most successful for DooH in the next 12 to 18 months?
Please rate the Top 3 vertical markets?

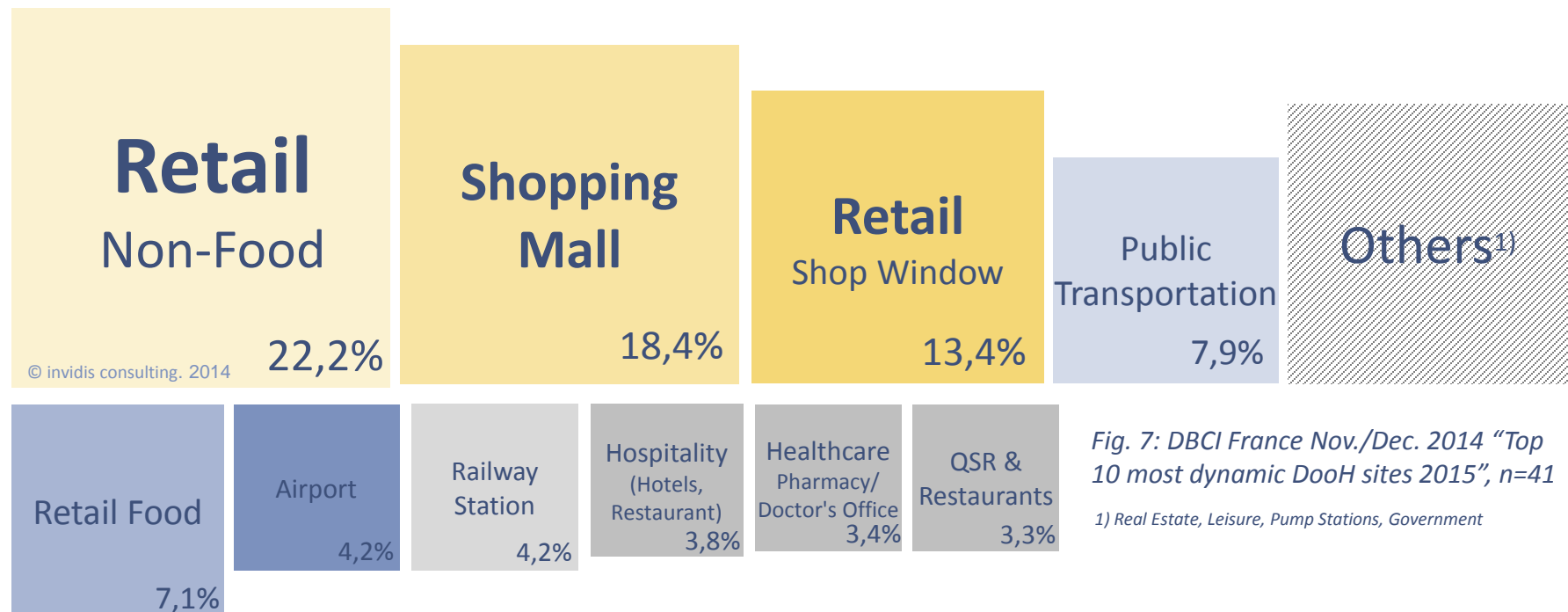


Fig. 7: DBCI France Nov./Dec. 2014 "Top 10 most dynamic DooH sites 2015", n=41

1) Real Estate, Leisure, Pump Stations, Government



Companies expecting growth in revenues in Europe (first half year & full year 2015)

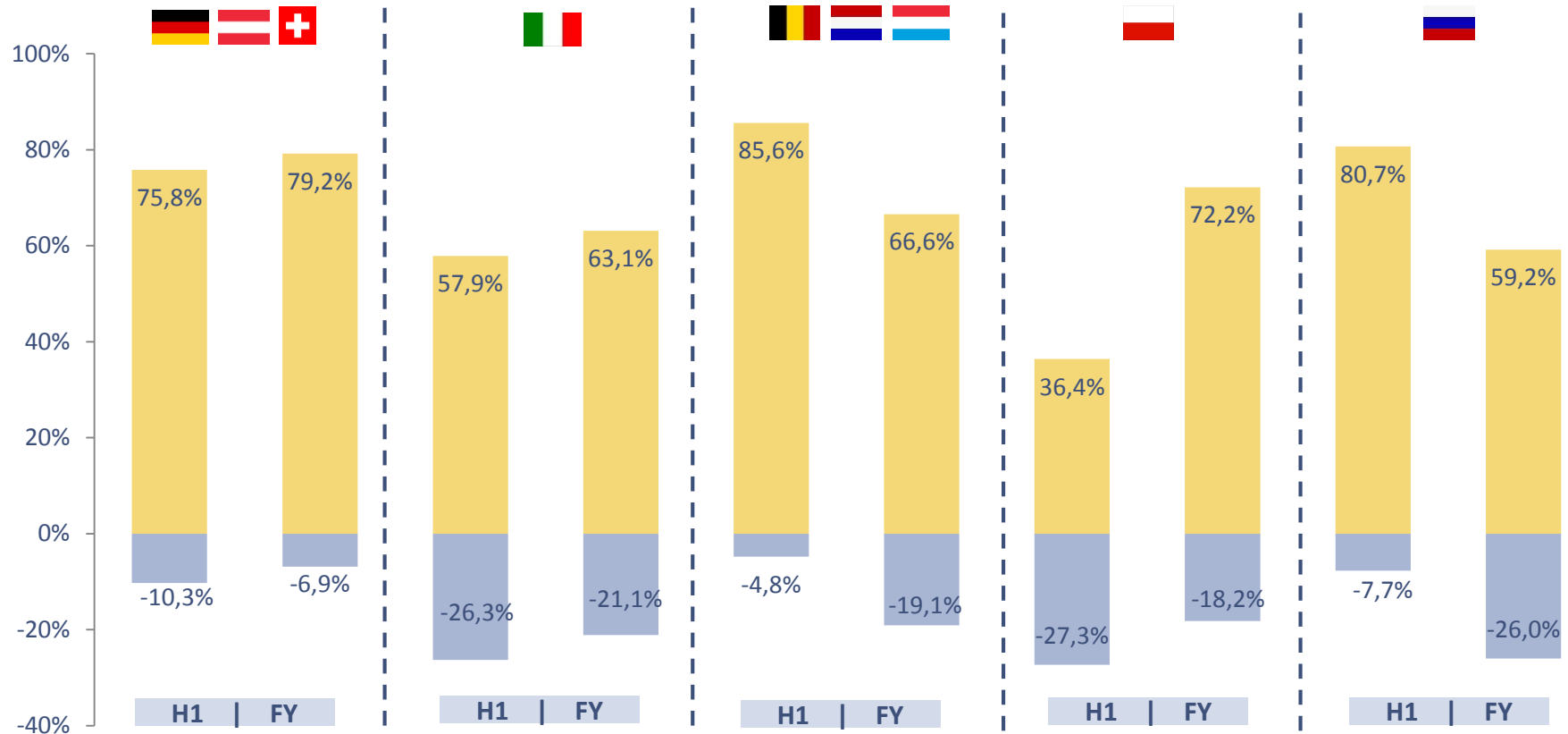


Fig. 8: DBCI France November | December 2014 „Revenues H1 & FY Europe“

*) H1: First semester/half year period; FY: Full year

 Roadmap 2015 & Contact

2015	
January	← Jan./Feb. 02.02.2015
February	
March	← Mar./Apr. 23.03.2015
April	
Mai	← May/Jun. 18.05.2015
June	
July	← Jul./Aug. 20.07.2015
August	
September	← Sept./Oct. 17.09.2015
October	
November	← Nov./Dec. 26.10.2015
December	

- The next survey will take place in calendar weeks 3-4 of 2015.
- The next planned publication date will be the 2nd of February 2014.
- The DBCI is polled by invidis consulting and published in cooperation with OVAB Europe.
- If you are not yet part of the DBCI survey please contact us for further information.
- The DBCI will be extended to other markets in 2014. For further information please contact Daniel Russell.

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