

France  
March | April 2015

**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  
2015 FR 200

  
**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 and Club du Digital Media
- Questions:
  - Current business situation: “good”, “satisfactory” or “poor”
  - Expectations for the next six months: “more favourable”, “unchanged” or “more unfavourable”
- **France** – second poll March | April 2015:
  - France is the 3rd largest market for Digital Signage in Europe
  - DBCI France: **58,65 base points**
  - **98%** record a **satisfying** or **good** business sentiment
  - Over **70%** expect a **more favourable** business situation within the next six months



Source: TMM

Share	Market	Growth <sup>*)</sup>
19%	DE AT CH	>10%
16%	UK   IE	>30%
11%	FR	>20%
10%	DK NO SE FI	>20%
8%	BE NL LU	>20%

1) YoY 2013/14, Source Meko

## Business sentiment & expectations remain on a very positive level

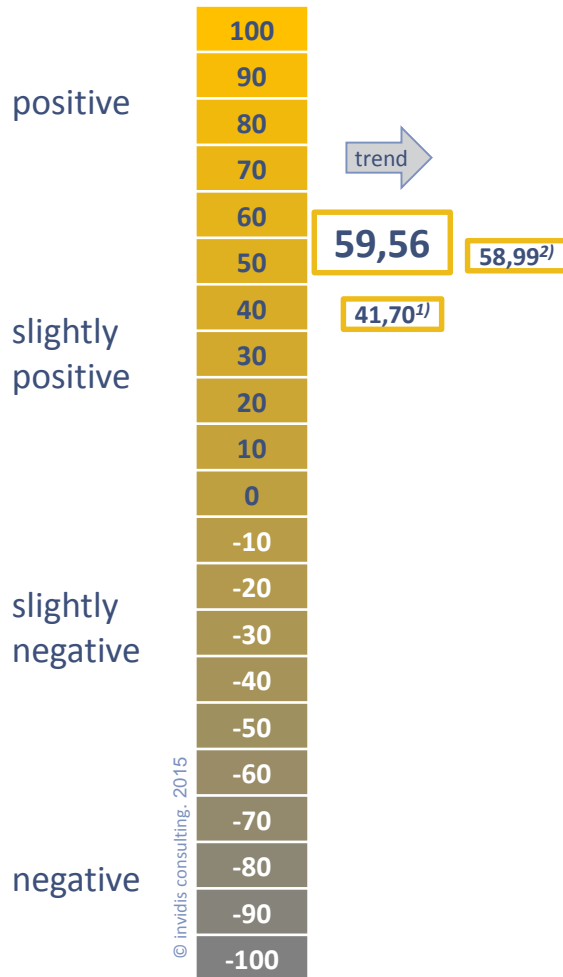


Fig. 1: DBCI France January/February 2015, n=57  
 1) DBCI France November/December 2014  
 2) DBCI France January | February 2015

- The digital Signage Business Climate Index France has been polled for the third time. The Index has increased by a margin from 58,99 base points to 59,65 base points
- The DBCI reflects the current positive business sentiment of the Digital Signage industry in France
- Almost all of the polled companies are satisfied or rate their current business climate as good. With 70% the answers for more favourable business conditions within the next six month has slightly declined.
- The industry will see a growing market share for the new technologies of high-brightness/sunlight readable and UHD/4k. As prices have been eroding by up to 20% year-on-year, the comparably high margins in these product categories will have a positive impact for hardware vendors and suppliers. However, due to a high cost (CAPEX & OPEX) growth will be limited and the overall market share will remain hedged to a maximum of 15% with High-Brightness and 10% with UHD. Particularly the energy costs for the former and the content costs for the latter are of interest here.

### Survey facts

- Participants: n=57
- Region: France
- Time frame: 2015 calendar weeks 10-11

 Total 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?

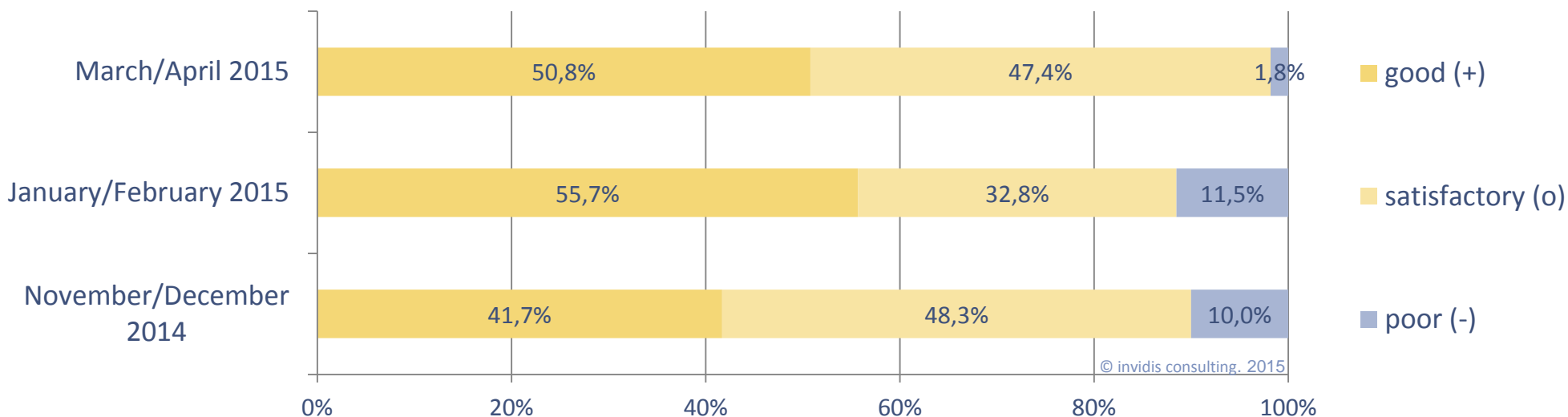


Fig. 2: DBCI France March/April 2015 "business situation", n=57

 Digital Signage industry with very positive outlook for the next six months

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

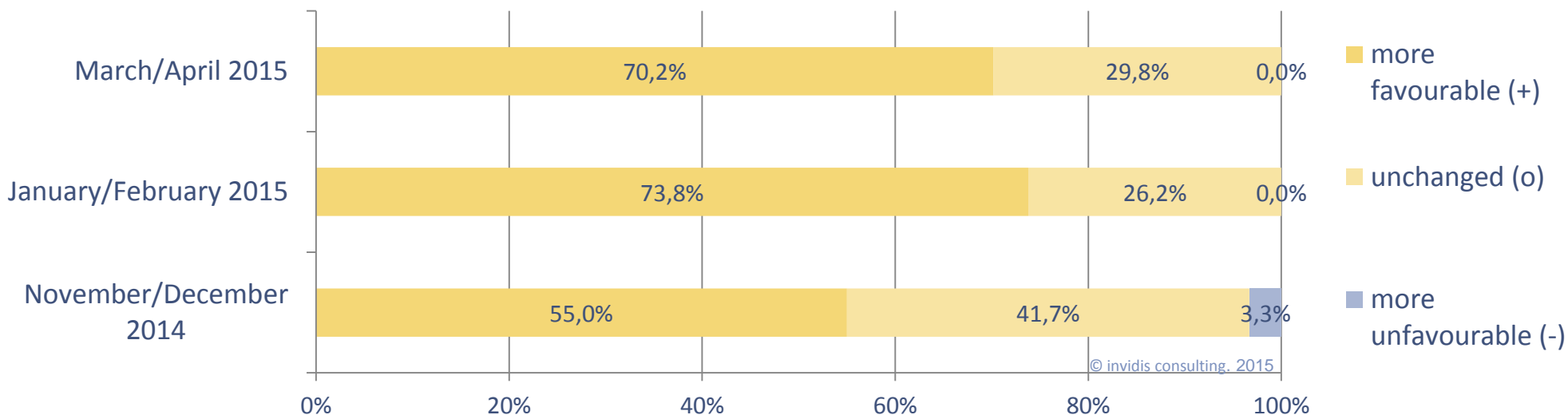


Fig. 3: DBCI France March/April 2015 "business expectations", n=57

Further research | Growing market share for High-Brightness & UHD expected

Market share High-Brightness displays in Digital Signage projects 2015

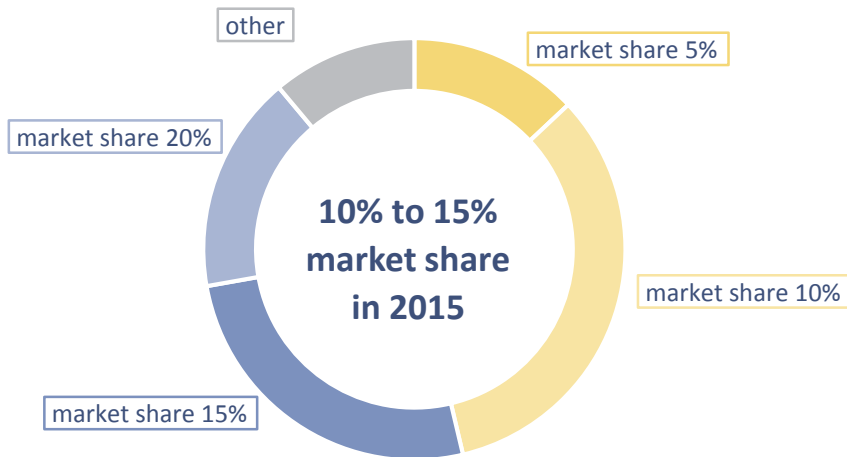


Fig. 4: DBCI France March | April 2015 "market share high-brightness 2015", n=54

**Question:** How do you expect will the market for High-Brightness displays evolve over the next 12 months? The market share will be at ...

LCD displays with different sustainable technological solutions for outdoor implementation have finally shown their market-readyness and will find a high demand. Particularly in the retail environment (e.g. shop window) customers will be likely to invest.

Market share UHD products in Digital Signage projects 2015

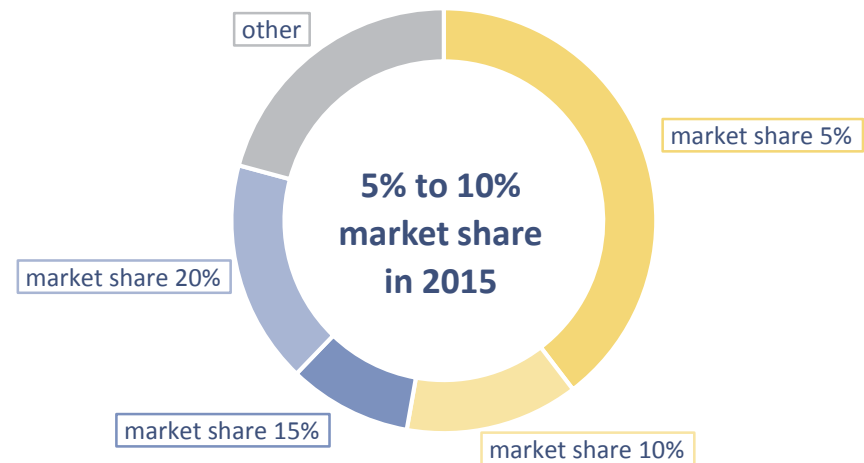


Fig. 5: DBCI France March | April 2015 "market share UHD 2014", n=53

**Question:** How do you expect will the market for UHD products (displays, media player, software, content) evolve over the next 12 months? The market share will be at ...

The very high costs for UHD content has a dampening effect on the expectations for full UHD projects in the next year.

 **DBCI | Roadmap 2015 & Contact**

<b>2015</b>	
January	
February	
March	
April	
May	← <b>May/Jun.   2015/05/20</b>
June	
July	← <b>Jul./Aug.   2015/07/22</b>
August	
September	← <b>Sept./Oct.   2015/09/15</b>
October	
November	← <b>Nov./Dec.   2015/11/18</b>
December	

- The next survey will take place in calendar week 18-19 of 2015
- The next planned publication date will be the 20<sup>th</sup> of May 2015
- 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 2015. For further information please contact Daniel Russell.

**Contact**

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