

France  
May | June 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**

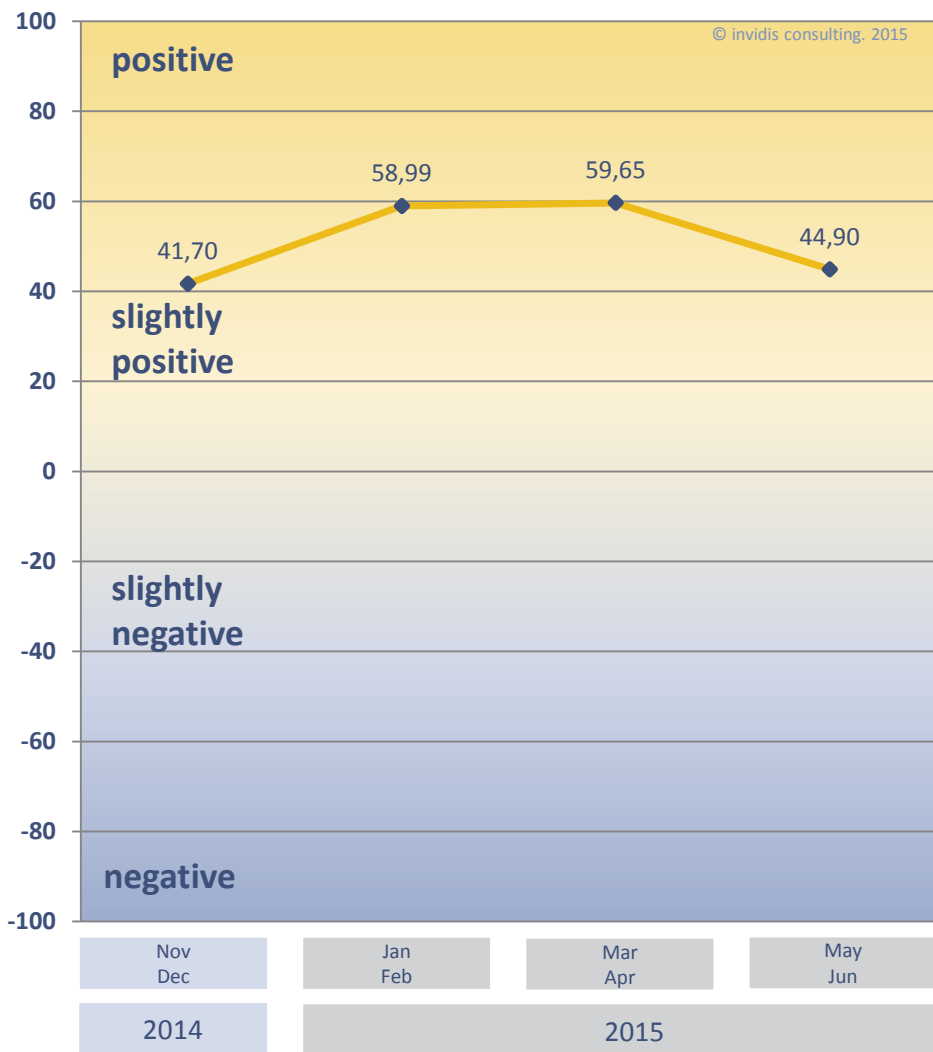
invidis research  
2015 FR 300

  
**invidis**  
CONSULTING

 DBCI - Introduction

- The OVAB Europe **D**igital **S**ignage **B**usiness **C**limate **I**ndex (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** – fourth poll May | June 2015:
  - France is the 3rd largest market for Digital Signage in Europe
  - DBCI France: **44,90 base points**
  - Over **90%** of the market participants record a **satisfying** or **good** business sentiment
  - **56%** expect a **more favourable** business situation within the next six months

 Business sentiment with slight decline in the second quarter of 2015



- The digital Signage Business Climate Index France has been polled for the fourth time. The Index has decreased by 14,75 base points from 59,65 base points to 44,90 base points.
- The DBCI reflects the current positive business sentiment of the Digital Signage industry in France
- Over 90% of the polled companies are satisfied or rate their current business climate with *good*. While only less than 10% see their situation as *negative*.
- However, with 56% the answers for more favourable business conditions within the next six month has declined. More companies than in the first quarter expect no big movement in the market until the end of the year.

**Further Research**

- There are high hopes for the market potential for LED display technology. The Digital Signage and Digital-out-of-Home companies polled in the DBCI all see a high to very high potential for LED display technology in competition to LCD displays within the next 24 months.

Participants: n=39; Region: FR; Survey Period: 2015 calendar weeks 18-19

Fig. 1: DBCI France May/June 2015, n=39

 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?

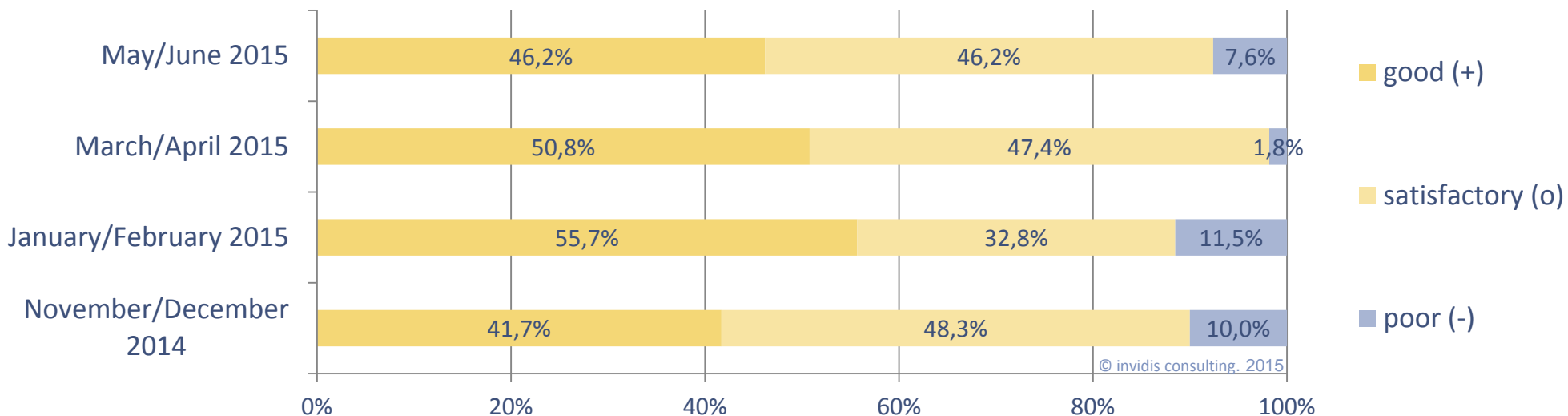


Fig. 2: DBCI France May/June 2015 "business situation", n=39

 Digital Signage industry with positive outlook for the next six months

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

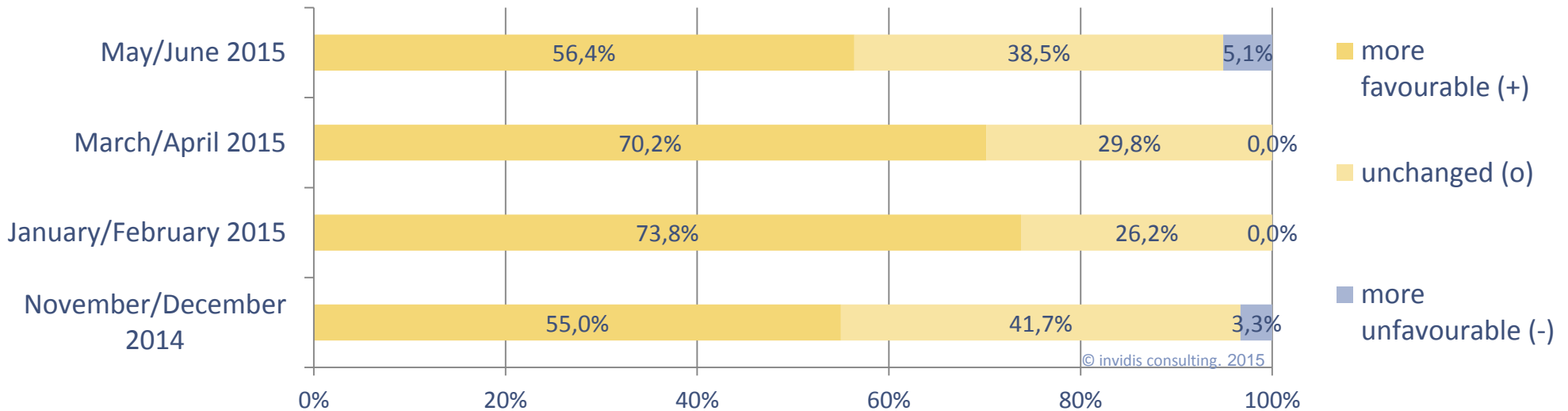


Fig. 3: DBCI France May/June 2015 "business expectations", n=39

## High hopes for market potential of LED display technology

**Question:** LED display technology has developed positively over the last years. Improved quality, smaller pixel pitch and lower prices have increased the acceptance in the market. How high do you see the potential for LED display technology in competition to LCD display technology in the next 24 months?

- The Digital Signage and Digital-out-of-Home companies polled in the DBCI all see a high to very high potential for LED display technology in competition to LCD displays within the next 24 months
- Over the last years, improvements in LED display technology have resulted in a lower pixel pitch. Together with a rapid increase in competition and hence falling prices the market potential of LED display technology will further increase in the next years. The big market players like Samsung and LG have noted this trend and duly seek a fast market entrance.
- Still the survey shows the highest potential is still attributed to outdoor installations. For indoor solutions the low viewing distance dictates a very low pixel pitch and hence high costs.

### LED display technology outlook 2016

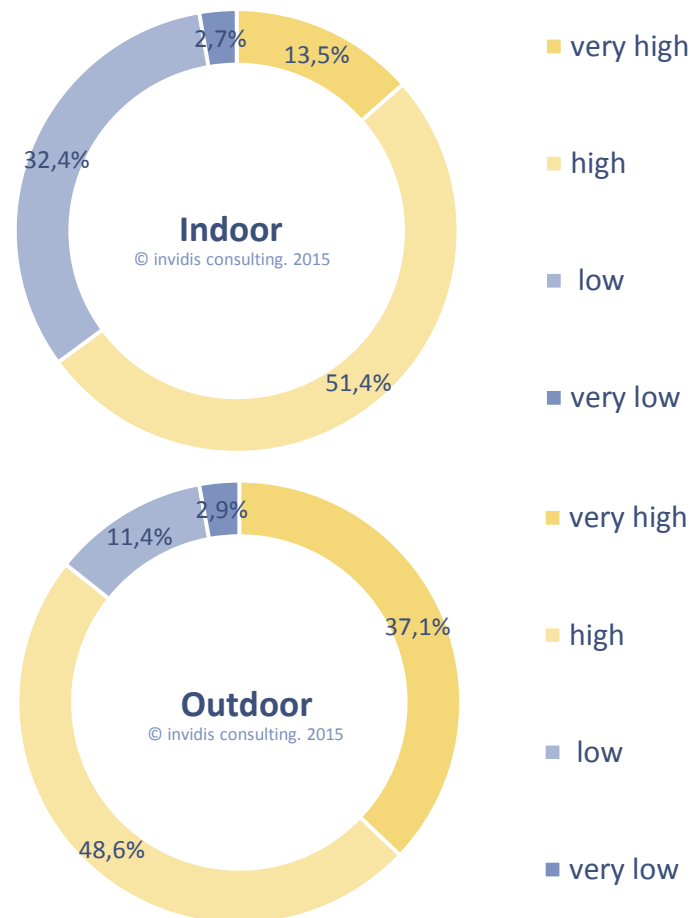


Fig. 4: DBCI France May | June 2015 "LED display technology outlook 2016", n=35

## DBCI | Roadmap 2015 & Contact

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

- The next survey will take place in calendar week 27-28 of 2015
- The next planned publication date will be the 22<sup>nd</sup> of July 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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