

France
July | August 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 400


invidis
CONSULTING

  **DIGITAL SIGNAGE
SUMMIT EUROPE**

 DBCI - Introduction

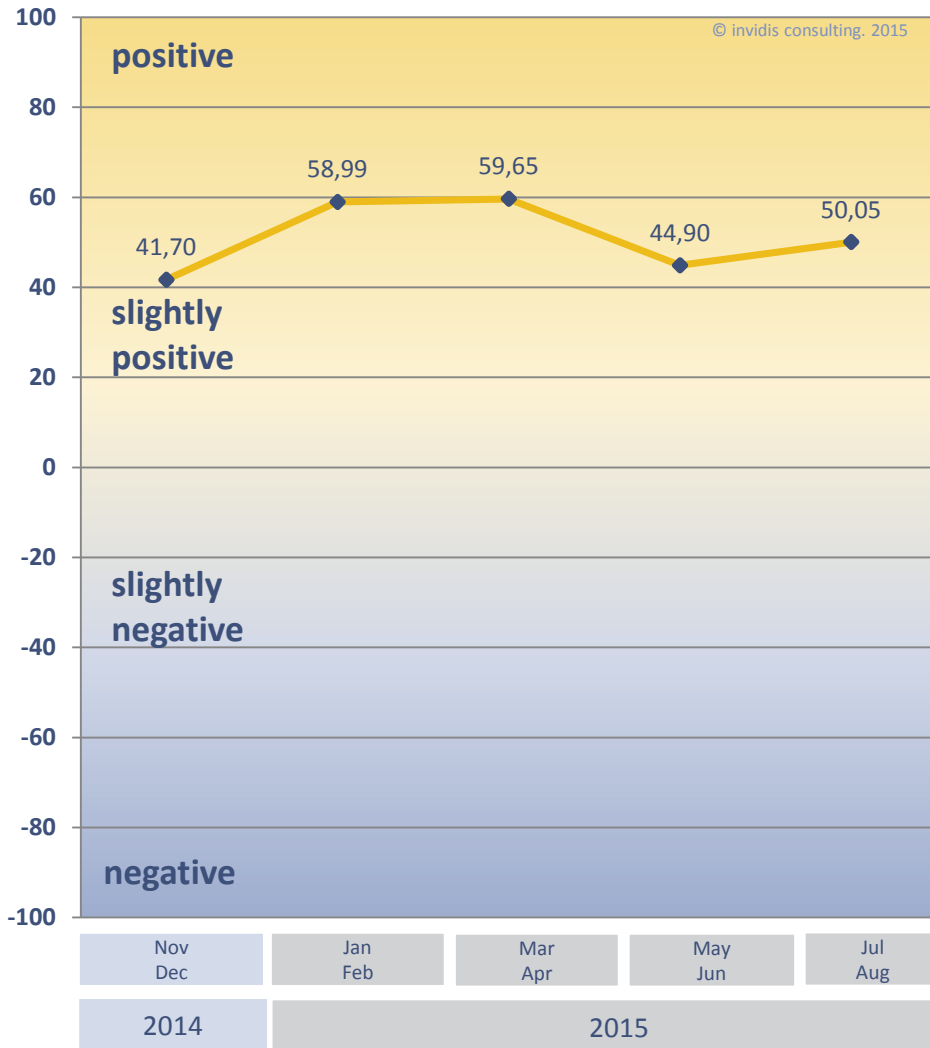
- The OVAB Europe **D**igital **S**ignage **B**usiness **C**limate **I**ndex (DBCI) is the leading European indicator of the economic development of the Digital Signage and Digital-out-of-Home industry
- It is polled every two months by invidis consulting in cooperation with OVAB Europe and Club du Digital Media
- Questions:
 - Current business situation: “good”, “satisfactory” or “poor”
 - Expectations for the next six months: “more favourable”, “unchanged” or “more unfavourable”
- **France** – fifth poll July | August 2015:
 - France is the 3rd largest market for Digital Signage in Europe
 - DBCI France: **50,05 base points**
 - Almost **90%** of the market participants record a **satisfying** or **good** business sentiment
 - **58%** expect a **more favourable** business situation within the next six months



10.-11. September 2015
Digital Signage Summit Europe in Munich
www.digitalsignagesummit.org



 The summer brings the business sentiment back on an upwards trend



- The digital Signage Business Climate Index France has been polled for the fourth time. The Index has increased by 5,15 base points from 44,90 base points to 50,05 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 10% see their situation as *negative*.
- With 58% the answers for *more favourable* business conditions within the next six month has increased

Further Research

- In 2014 approximately less than 10% of all Digital Signage solutions or DooH campaigns were realized with the integration of mobile devices
- Within the next two years the market participants see the current situation changing. The market share of Digital Signage solutions or DooH campaigns using mobile integration will grow to on average of 10%.

Participants: n=38; Region: FR; Survey Period: 2015 calendar weeks 28-29

Fig. 1: DBCI France July/August 2015, n=38

 High satisfaction with the current business situation increases

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

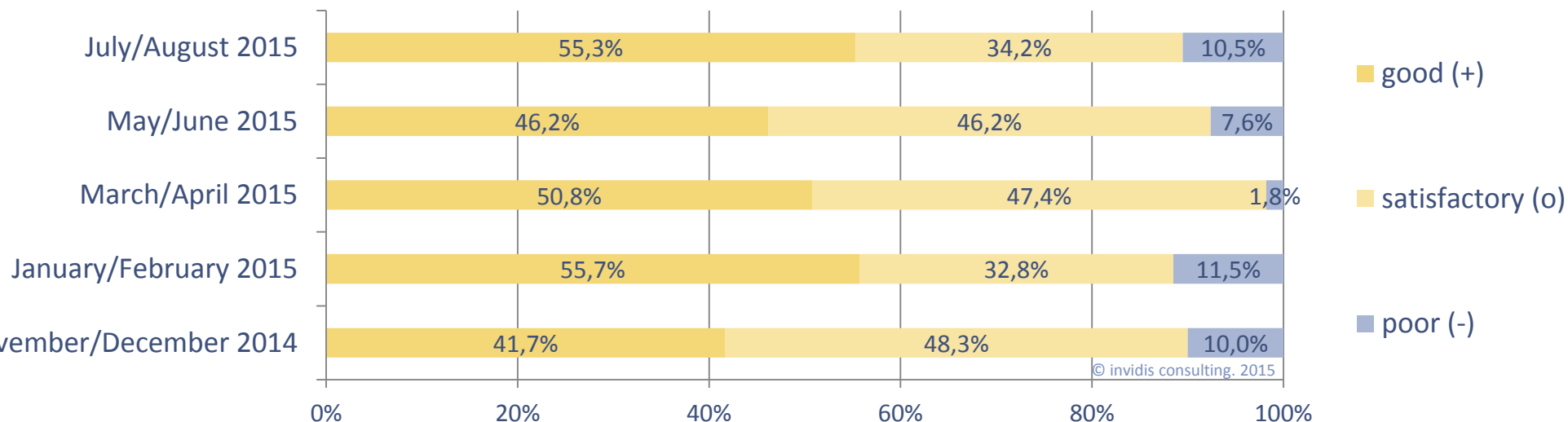


Fig. 2: DBCI France July/August 2015 "business situation", n=38

 Digital Signage industry with positive outlook for the next six months

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

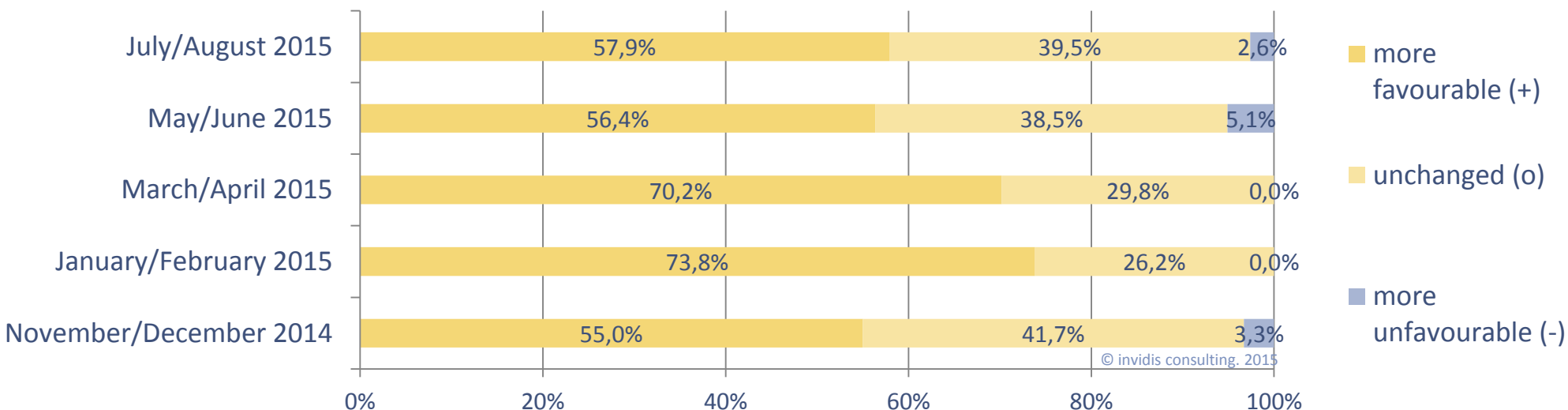


Fig. 3: DBCI France July/August 2015 "business expectations", n=38

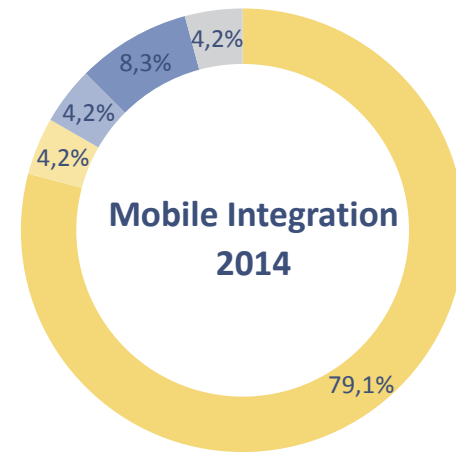
Further research | Mobile integration is still in it's infancy

Question: How high was the percentage of Digital Signage installations or DooH campaigns with mobile integration you have realized in the last 12 months?

- Mobile integration is one of the buzzwords connected to the omni-channel retail concept within the digital transformation
- However, in 2014 still less than 10% of all Digital Signage solutions or DooH campaigns were actively banking on integrating mobile devices
- Most installations or campaigns still rely on content which doesn't access the many interactive possibilities of the digital world, but rather is a digitized version of an analogue media format (i.e. poster)

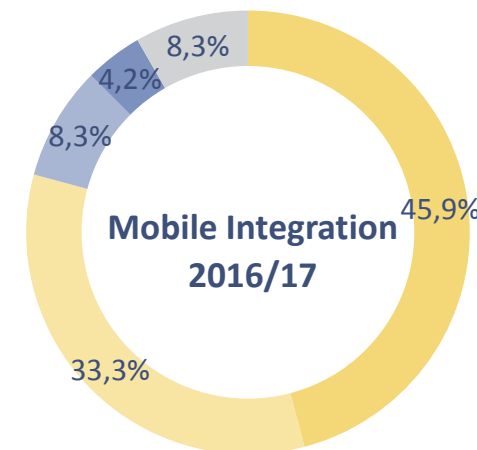
Question: How high do you expect the percentage of Digital Signage installations or DooH campaigns with mobile integration will be in 24 months?.

- Within the next two years the market participants see the current situation changing. The expectation is that in average between 10% of all of projects will be rolled out with mobile integration.



Market share of Digital Signage solutions with mobile integration in 2014

- less than 10%
- 10%
- 20%
- 30%
- more than 30%



Market share of Digital Signage solutions with mobile integration in 2016/17

- less than 10%
- 10%
- 20%
- 30%
- more than 30%

Fig. 4: DBCI France July | August 2015 "mobile integration", n=24

DBCI | Roadmap 2015 & Contact

2015	
January	
February	
March	
April	
May	
June	
July	
August	
September	← Sept./Oct. 2015/09/15
October	
November	← Nov./Dec. 2015/11/18
December	

- The next survey will take place in calendar week 35-36 of 2015
- The next planned publication date will be the 15th of September 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

Daniel Russell | Research Analyst

invidis consulting GmbH

Rosenheimer Str. 145e

81671 München

Daniel.Russell@invidis.com

Phone: +49 89 2000416-21

Mobile: +49 151 62438503

Fax: +49 1805 5224 301

10.-11. September 2015
**Digital Signage Summit Europe in
München**
www.digitalsignagesummit.org

