

France
November | December
2015

DBCI

The pulse of the Digital Signage
and DooH industry

OVAB Digital Signage & DooH
Business Climate Index

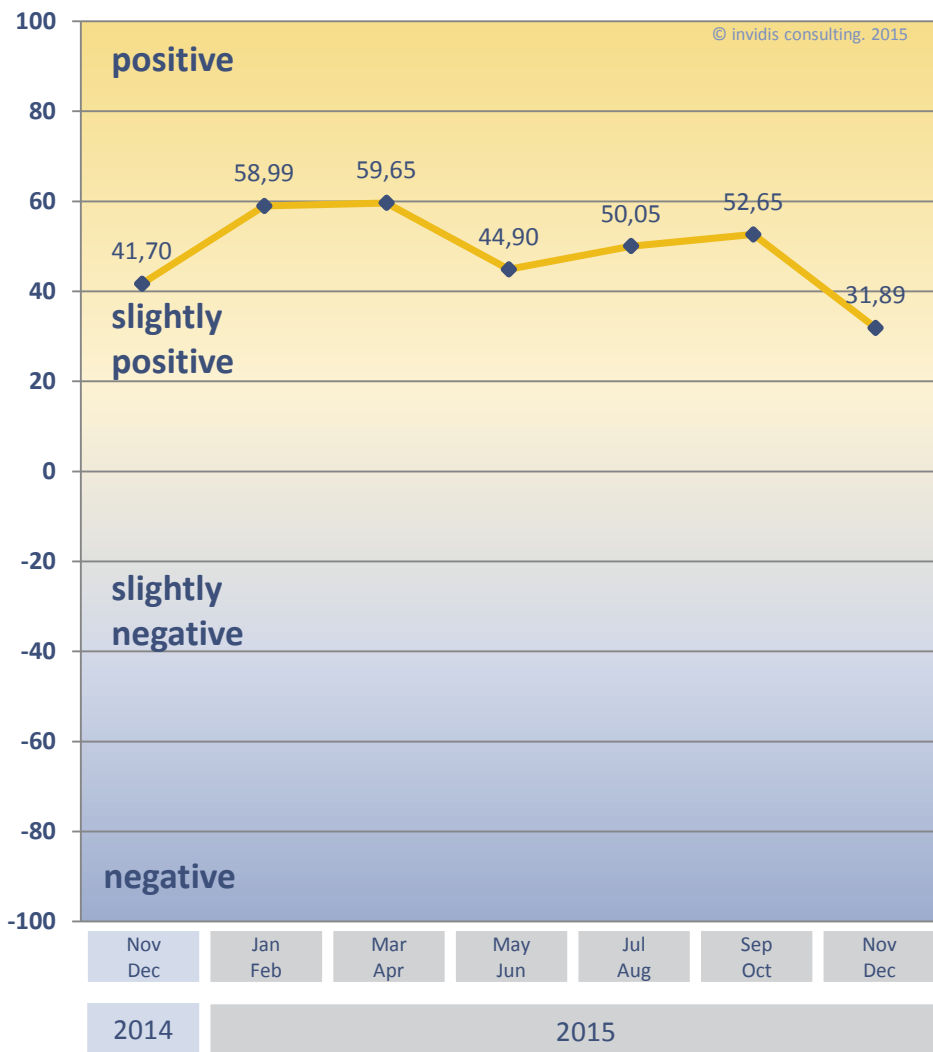
Cooperation Partner France

**Club du
Digital
Media**

invidis research
2015 FR 600


invidis
CONSULTING

Digital Signage business sentiment is slowing down in France



- The digital Signage Business Climate Index France has decreased significantly by 20,76 base points from 52,65 base points to 31,89 base points. The decline of the index has been fairly strong. However, almost 60% of the market participants are still satisfied with their current situation and business in general is good. But most market participants are concerned by an in average very long tender process and increasingly fierce competition in the French IT and Digital Signage market.
- At the same time the optimism towards the near future is consentingly good. Now well over 55% of all polled companies expect a *more favourable* situation for their products and services in the Digital Signage and Digital out of Home market within the next six months.

Further Research

- The market leaders among the distributors in France are SIDEV, Tech Data and FVS. Between 45% and 55% of the market participants have worked with those competitors.
- 45% of the DooH market has seen a rise in bookings in the current year. The overall market is expected to register a healthy increase in the number of advertising bookings for 2015

Participants: n=47; Region: FR; Survey Period: 2015 calendar weeks 46-47

Fig. 1: DBCI France November | December 2015, n=47

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?

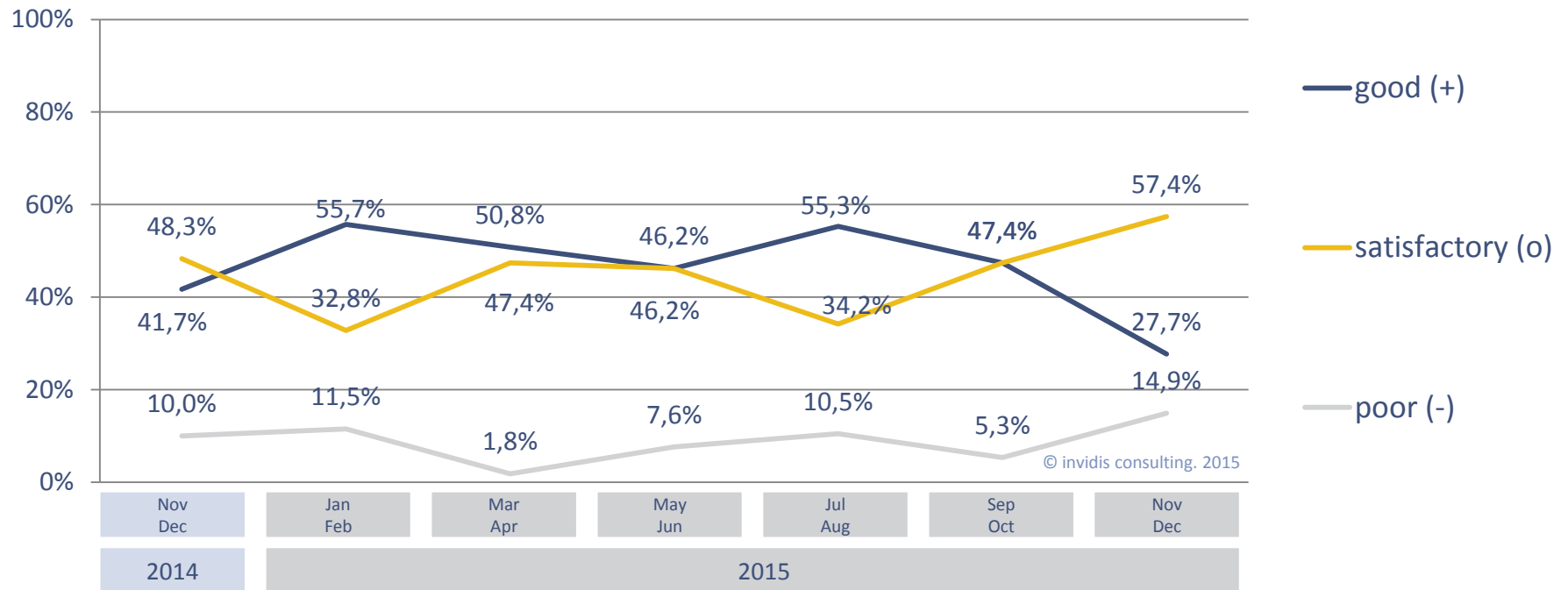


Fig. 2: DBCI France November | December 2015 "business situation", n=47

France Digital Signage industry with robust outlook for the next six months

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

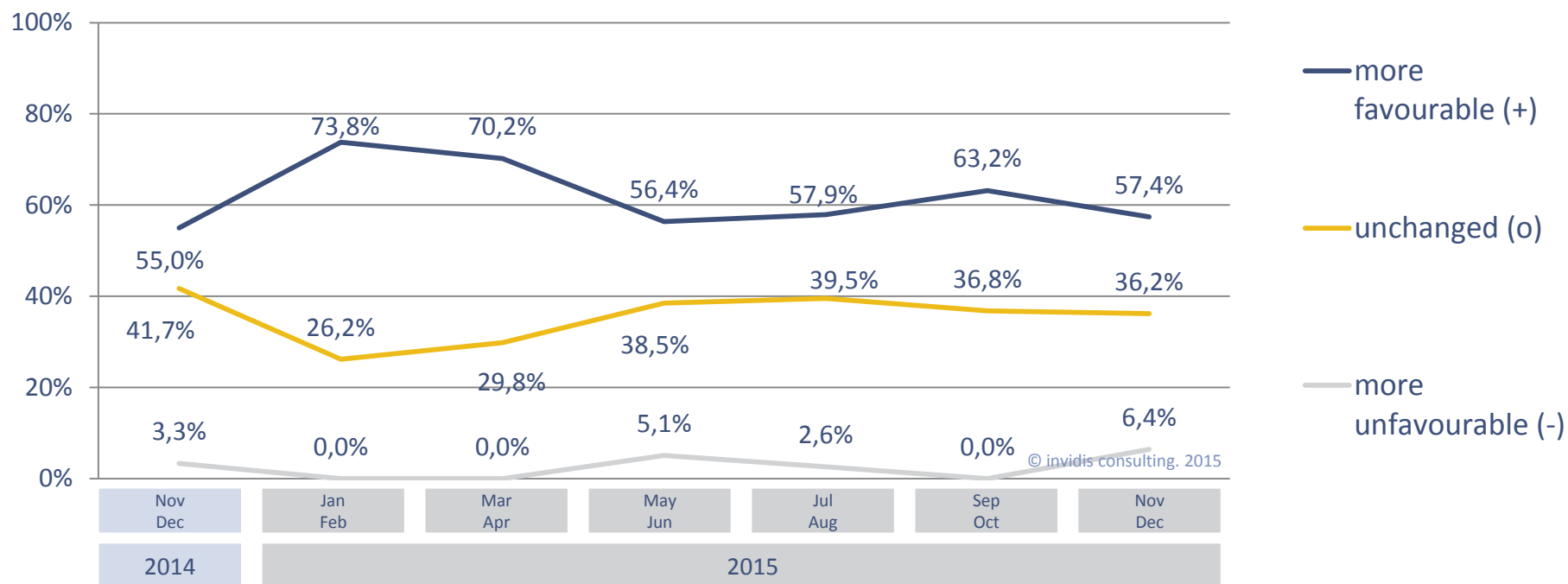


Fig. 3: DBCI France November | December 2015 "business expectations", n=47

 Further research | The market is dominated by the Top 3 distributors

Question: „With which distributors do you work together?“

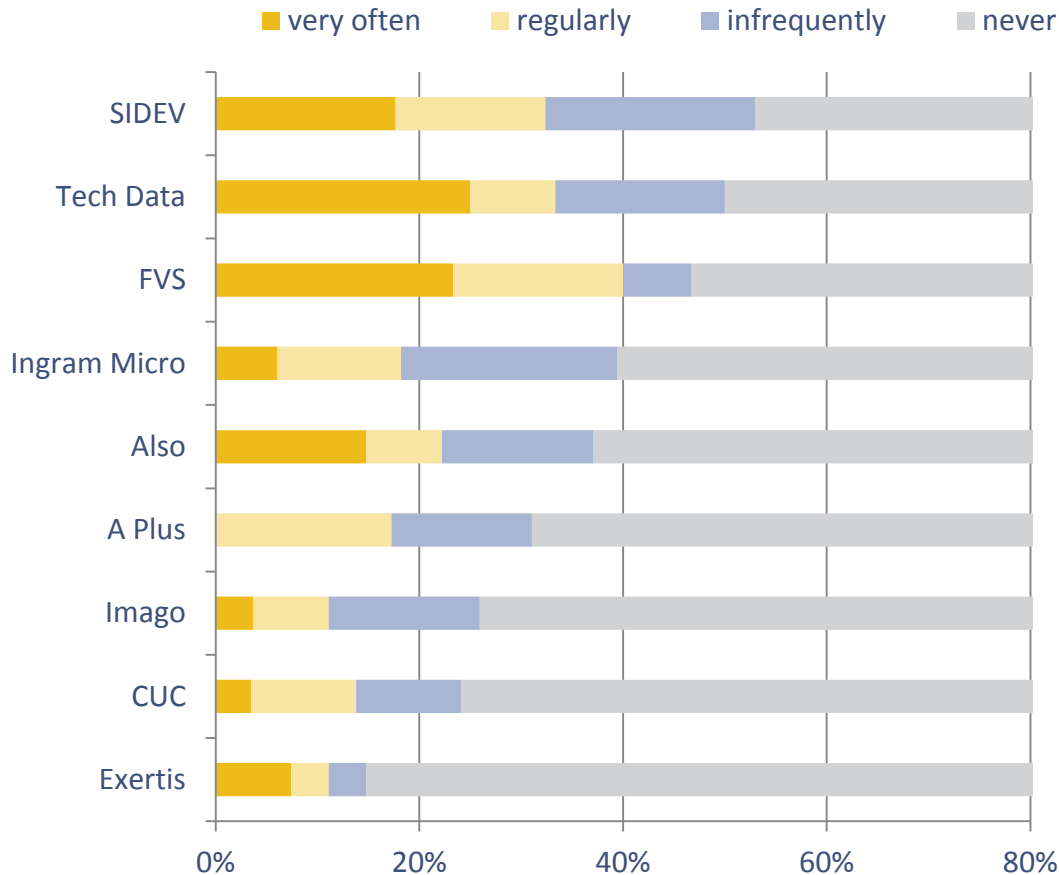


Fig. 4: DBCI France November/December 2015 “Ranking distributors”, n=28 (mean value)

- The three market leaders among the distributors in France are SIDEV, Tech Data and FVS. Between 45% and 55% of all polled companies work with these distributors.
- In many countries a local champion plays an important role in the market for distributors. In France it is SIDEV, in Germany Delo and in Switzerland MobilePro.
- In short succession follow the pan-European distributors Ingram Micro and Also. Between 35% and 40% of the market participants have worked with those competitors.
- Most IT distributors offer Digital Signage related services. The market participants have noted that DS projects offer a good possibility to generate additional revenues to the standard box-moving business.

Further research | DooH is steadily increasing in relevance

Question: Please rate the degree of capacity utilization of your DooH network(s) with advertising bookings in 2015 compared to 2014 (including the expected bookings until the end of the current year)?

- Almost 50% of the polled companies currently doing business in the Digital out of Home market have registered a similar number of advertising bookings in the year-on-year trend in 2015 compared to 2014
- Still 45% of the market has seen a rise in bookings in the current year. Thus the overall market is expected to register a healthy increase in the number of advertising bookings for 2015.
- In general DooH is starting to play a more and more important part in the media landscape. DooH is accounting for the most dynamic segment in the traditional ooH advertising branch. Primarily through the digitalisation of media assets has the industry been able to compete with the development in the new media landscape.

**YoY bookings of DooH Networks
2014/15**

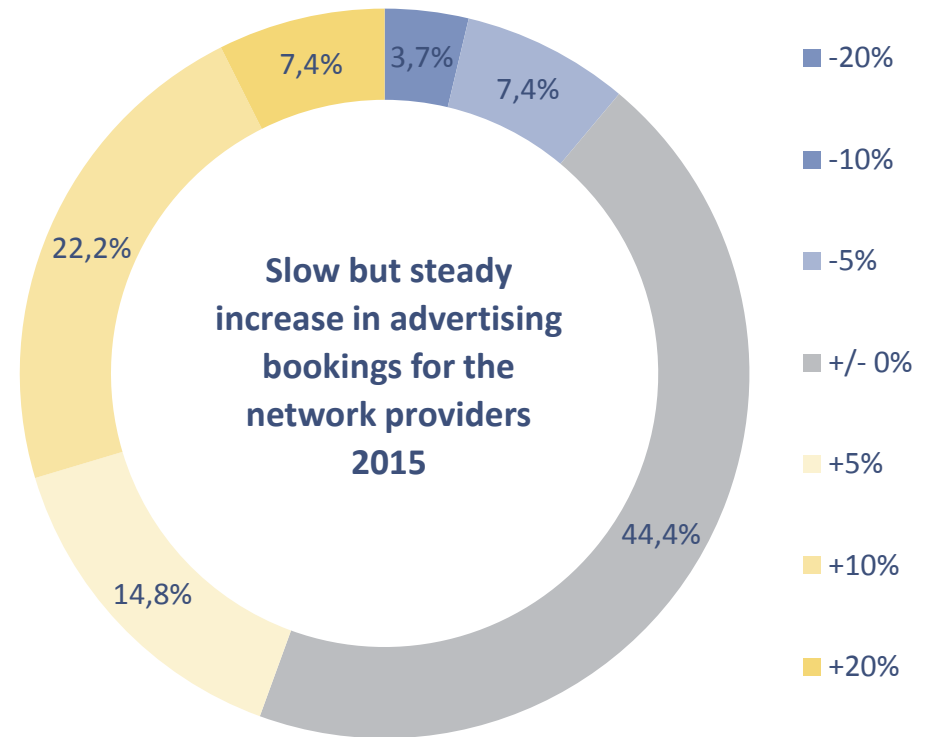


Fig. 5: DBCI France November | December 2015 "capacity utilization 2014/15", n=27

 **DBCI | Roadmap 2015 & Contact**

2016	
January	← Jan./Feb. 2016/02/01
February	
March	← Mar./Apr. 2016/03/21
April	
May	← May./Jun. 2016/05/23
June	
July	← Jul./Aug. 2016/07/18
August	
September	← Sep./Oct. 2016/09/19
October	
November	← Nov./Dec. 2016/11/21
December	

- The next survey will take place in calendar weeks 2-3 of 2016
- The next planned publication date will be the 1st of February 2016
- 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 2016. For further information please contact Daniel Russell.

Contact

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