

France

January | February 2016

DBCI

The pulse of the Digital Signage
and DooH industry

OVAB Digital Signage & DooH
Business Climate Index

Cooperation Partner France

Club du
Digital
Media

 **DIGITAL SIGNAGE
SUMMIT @ISE**

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2016 FR 100


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🇫🇷 Digital Signage market back on positive trend at the start of the year

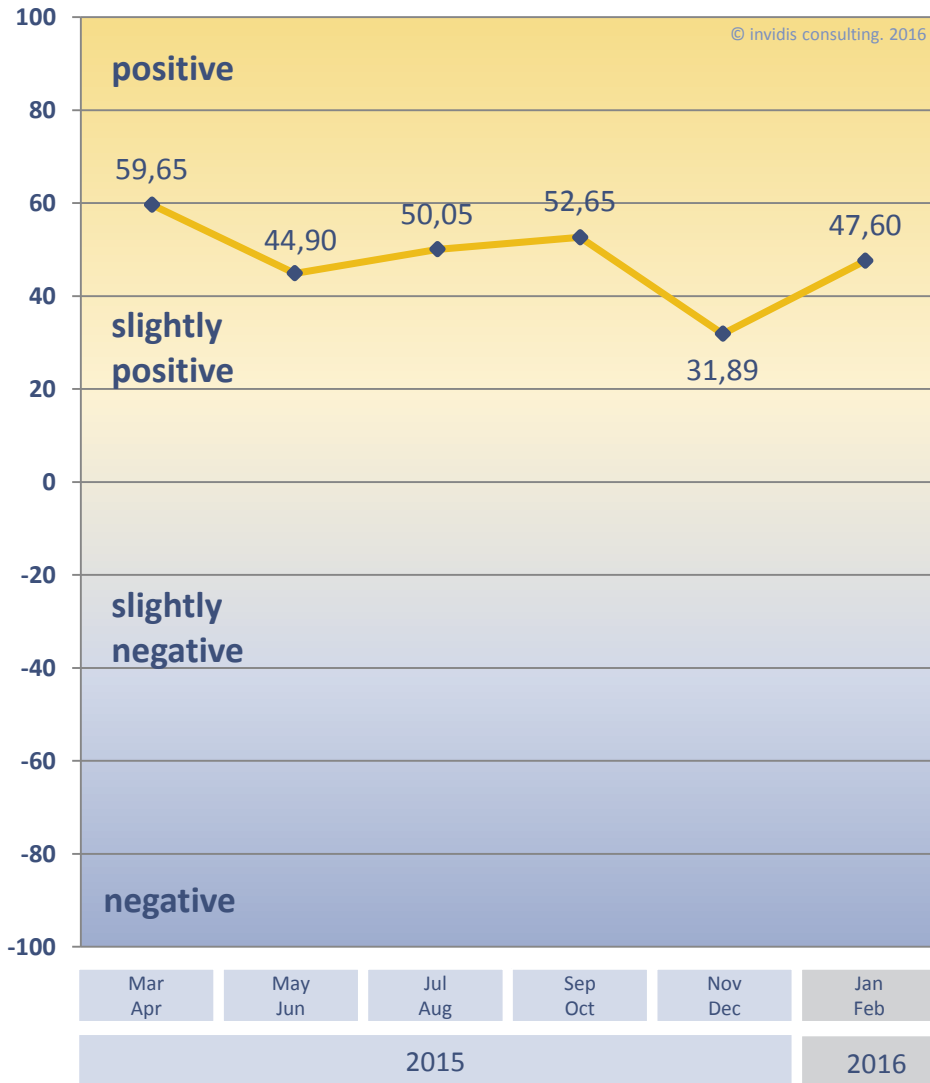


Fig. 1: DBCI France January | February 2016, n=41

- The digital Signage Business Climate Index France has increased by 15,71 base points from 31,89 base points to 47,60 base points. The slump in November 2015 has been turned around and the increase in January is almost 50%. However, year-on-year the index could not reach the high satisfaction level of the beginning of the year in 2015 and had to accept a 19% decline.
- The current business situation is rated much better as almost all polled companies are satisfied or better off. At the same time the optimism towards the near future has been rated slightly more conservative. Now over 53% of the market participants expect a *more favourable* situation for their products and services in the Digital Signage and DooH market within the next six months.
- In France the Digital Signage industry is still rather dependent on individual projects. Hence, short term alterations in the general economy or with the customers often have a direct impact – positive or negative – on the market participants and are responsible for the volatile business sentiment.



Participants: n=41; Region: FR; Survey Period: 2016 calendar weeks 2-3

Markedly increased current business situation & robust outlook

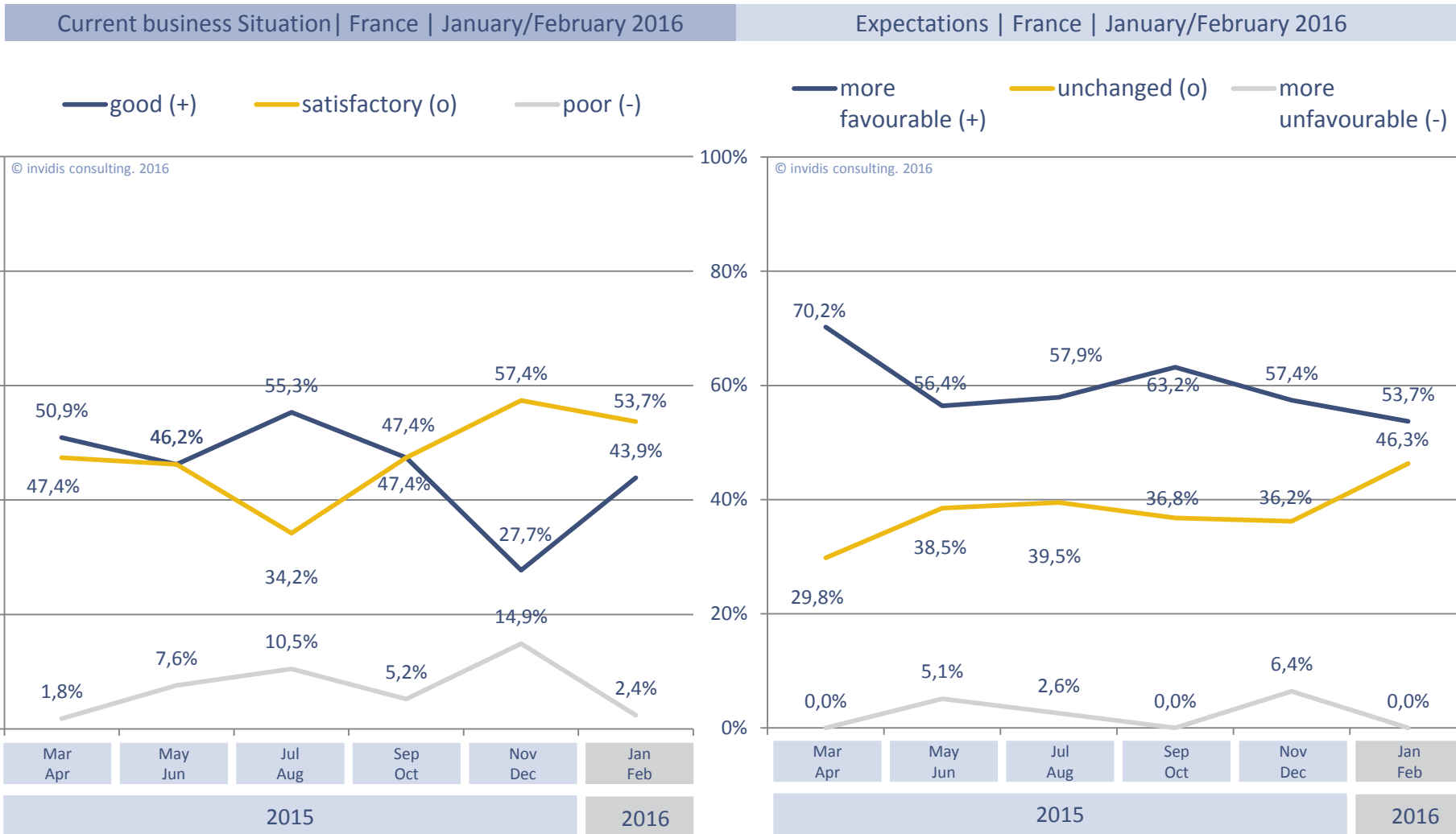


Fig. 2: DBCI France January | February 2016 „Business Situation“ rolling 12 months, n=41

Fig. 3: DBCI France January | February 2016 „Expectations“ rolling 12 months, n=41

🇫🇷 Hirings 2015 | Digital Signage creates many new jobs

- **68,5%** of all companies in the Digital Signage Market have hired new staff in the last year.
- In 2015 **over 150 new jobs** were created in the Digital Signage market in France.
- Now this unbroken positive trend in the IT industry overall has developed in a definite shortage of qualified personal. Companies are more and more concerned, how they can match recruiting with their growth strategy.
- As a whole there is a high demand for qualified personnel. Due to the digital transformation and the increasing integration of digital technologies the demand for personnel on a management level with new qualifications is very high (e.g. key account and project manager).
- The increasing expansion in vertical markets leads to a demand for more professionals from different industry branches by Digital Signage companies.

Company growth in new jobs created 2015

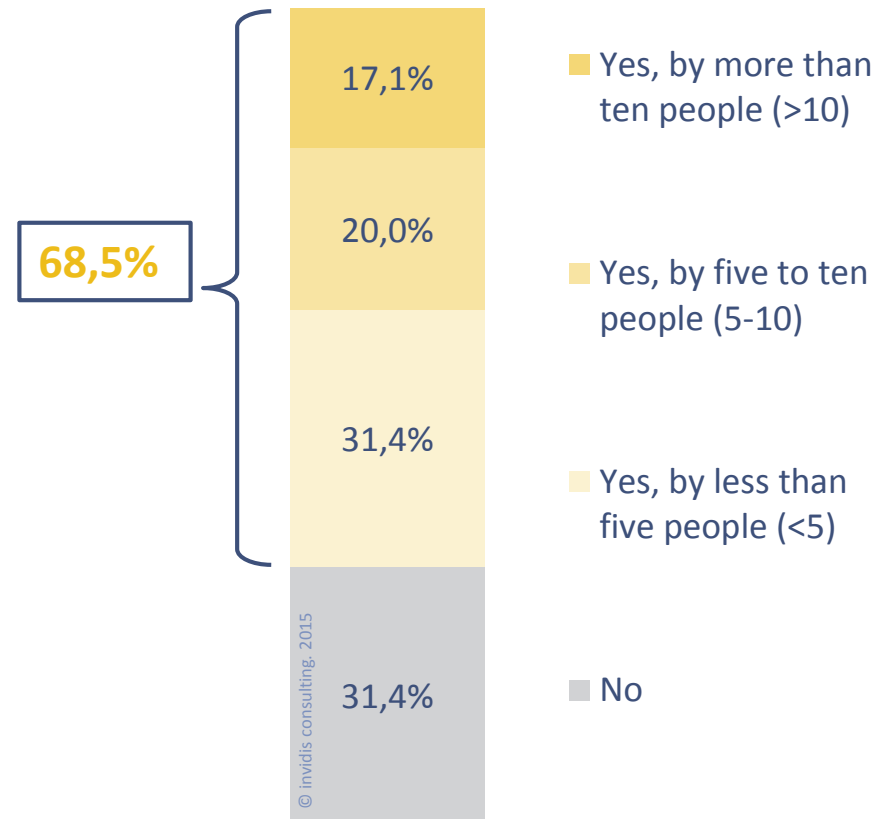


Fig. 4: DBCI France January/February 2016 "Hirings 2015", n=35

Tops & Flops 2015 | Good revenue growth and 4k moved the market

- When asked about the positive developments for the Digital Signage and Digital-out-of-Home industry in 2015, many of the polled companies have mentioned their overall satisfaction with the economical development. The maturity of the Digital Signage market was also honoured by the customer as rising demand resulted in robust growth in revenues.
- The last years also saw the emergence of new high end technology solutions like Ultra-High-Definition (4k) display technology. Whereas display solutions for on-board media players like SoC and OPS as well as out-of-the-box packaging of hard and software on Android basis has been stimulating the customer demand, particularly in the SMB segment. The quality of established technologies like touch and video wall has been further improved, which reflected well in the sales numbers.
- Digital Signage solutions in the retail/POS environment still is one of the most important revenue generators for market participants. However, lately the dynamism for corporate communication projects has also gathered speed.
- When asked about the negative developments on the Digital Signage market, the survey participants criticized primarily that in spite of high customer demand, realisations are slow and lag behind expectations.
- Many market participants also were concerned with some technology solutions not yet reaching the expected performance. The opinion is that the recent developments like entry level signage solutions, iBeacons or 3D technology have not yet reached a sufficient level of quality.



image: invidis

Trends 2016 | Interactivity and retail solutions on the agenda for 2016

- The market participants have identified many different trends for the year 2016. In their eyes one dominant trend is interactivity. Touch technology is becoming extensively integrated and now more and more smart concepts have markedly increased the usability. This development will pick up more speed in the future, particularly as the second big trend is closely connected.
- Digital Signage in retail or at the POS is still a big issue. The media will become the focal point where brick-and-mortar and online meet. Intelligent Multi- and Omni-channel concepts are in demand. Digital Signage companies will have to think more integrated, as technologies like Beacons, electronic price tags, customer flow management and analytics come into the fold. Particularly, high quality display technology suitable for an outdoor environment (high brightness/sunlight readable) is opening up the potential of endless miles of shop windows.
- Concerning the latest technology trends, the companies surveyed in the DBCI see falling prices for LCD and LED display technology. This results in growing customer demand for larger display sizes and LED boards. Next to this, a small yet continuously growing market share for UHD (4k) is expected.
- The main trends in the Digital-out-of-Home segment will further be the two main pillars of success for the media, quality audience measurement (standardisation, etc.) and effective integration in the digital media world e.g. programmatic buying. Also a consistent development of the existing networks in size and quality is expected.



image: invidis

 **DBCI | Roadmap 2016 & Contact**

2016	
January	
February	
March	← DBCI Mar./Apr. WN14
April	
May	← DBCI May./Jun. WN22
June	
July	← DBCI Jul./Aug. WN31
August	
September	← DBCI Sep./Oct. WN40
October	
November	← DBCI Nov./Dec. WN49
December	

- The next survey will take place in calendar weeks 11-12
The next planned publication will be in week 14
- 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.

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 DSS | The Digital Signage Summit series

- «Digital Signage Summit» new brand for event series
 - ❖ DSS Europe: 23-24 June 2016
 - ❖ DSS MENA: 19-20 Sep 2016
 - ❖ DSS Russia: 1-2 Nov 2016
- DSS is a dedicated confex event platform - conference and exhibition - featuring digital signage and Dooh topics
- Each event features visionary and best practise presentations as well as panel discussions concerning the most recent state of the art projects, trends and drivers of the industry
- All events also have a dedicated exhibition space for product presentation and networking opportunities