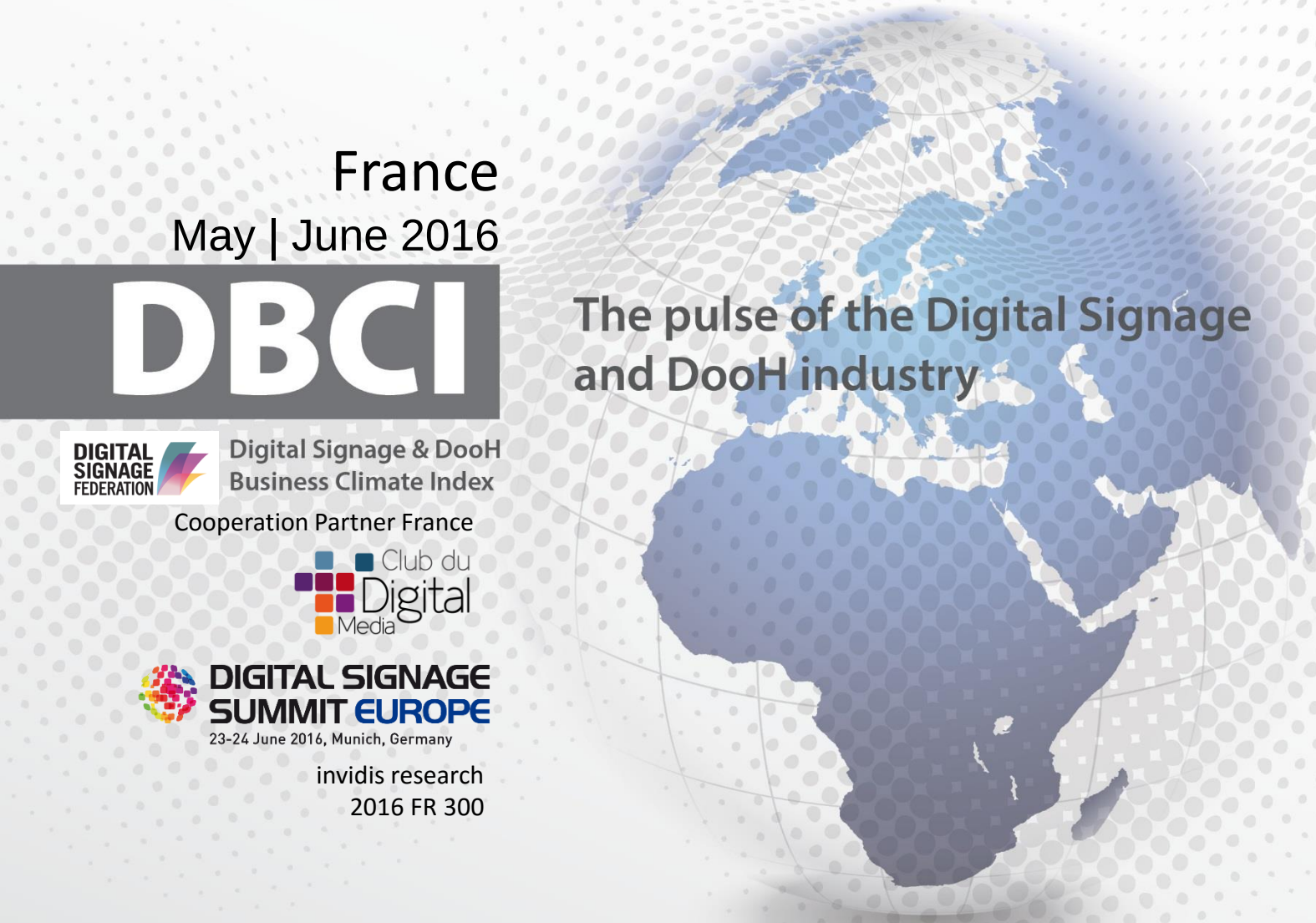
France

May | June 2016

DBCI

Digital Signage & DooH Business Climate Index

Cooperation Partner France



DIGITAL SIGNAGE SUMMIT EUROPE
23-24 June 2016, Munich, Germany

invidis research
2016 FR 300

Robust business sentiment in the French Digital Signage market in May

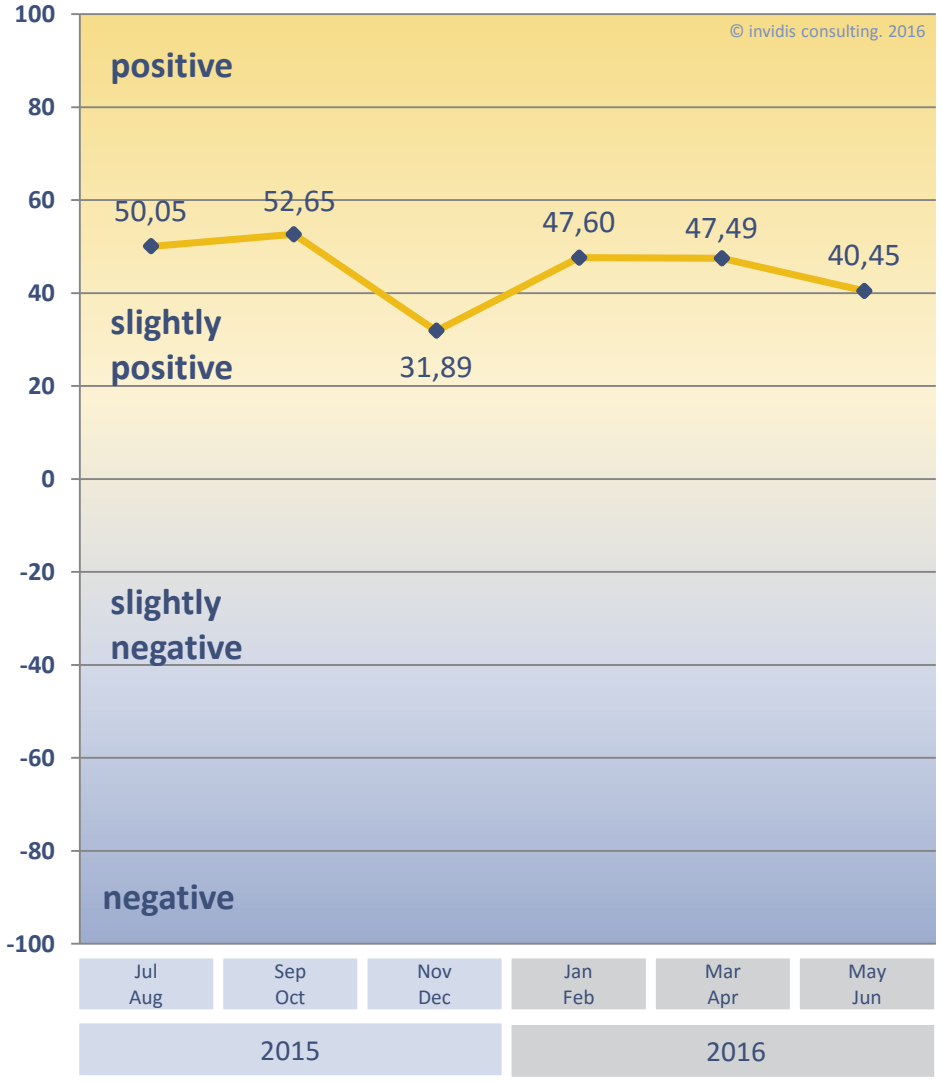


Fig. 1: DBCI France May | June 2016, n=21

- The Digital Signage Business Climate Index has declined since the last survey in March with a minor nominal decrease by 7,04 base points from 47,49 points to 40,45 base points.
- Contrary to the index trend the current business situation is rated much more positive by the market participants - with negative ratings dropping off.
- However the optimism for the near future has declined drastically. The negative expectations and the conservative expectations have increased and now only half of the market expects further demand growth for their products and services within the next six months.
- The terrorist attacks in Paris have left the retail industry with a strong decline in customer demand. Most retailers planning to invest in Digital Signage have stalled the projects to wait for the positive effects of the tourist season.
- Most Digital Signage solutions have been reliant on Windows as OS in 2015. However Linux based solutions are increasingly implemented

	year-on-year	*previous survey*
change DBCI 2016 #3	**-9,9%**	**-14,8%**

Participants: n=21; Region: FR; Survey Period: 2016 calendar weeks 18-19

Increased current business situation, but markedly more conservative outlook

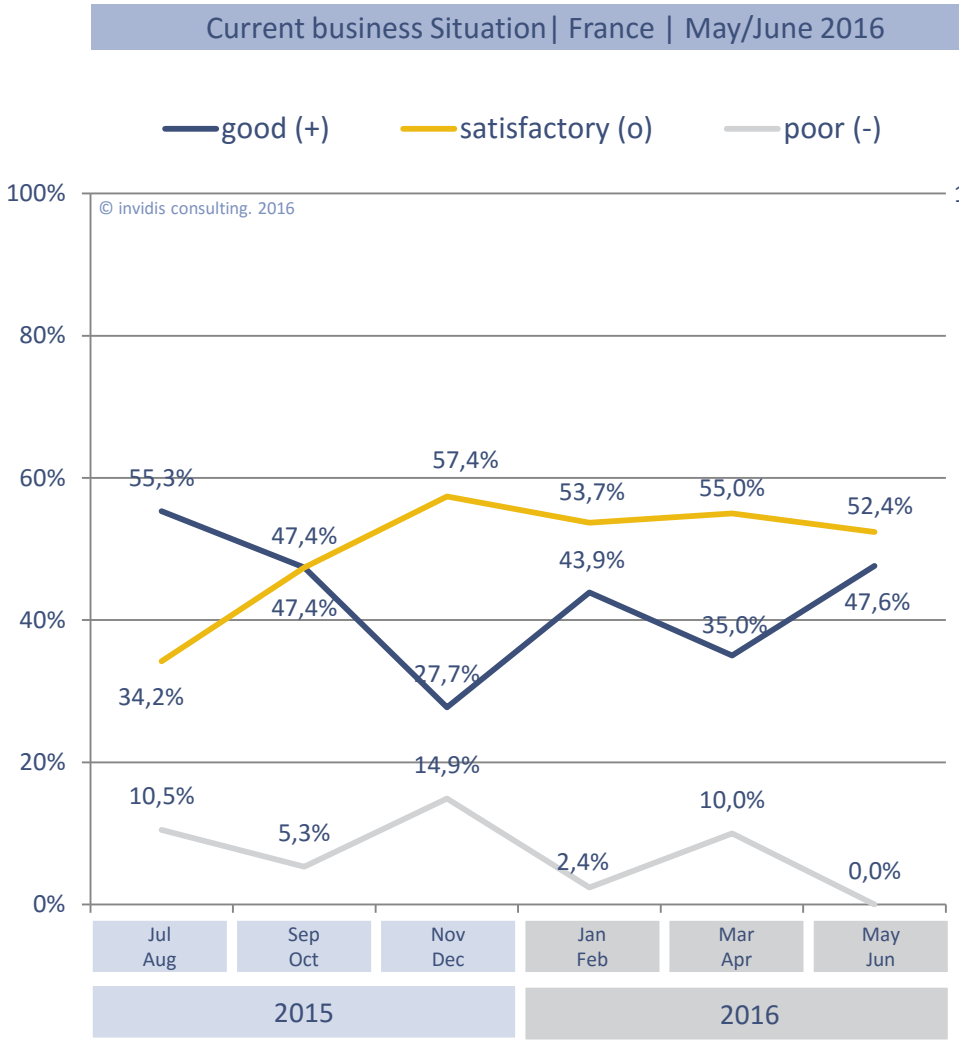


Fig. 2: DBCI France May | June 2016 „Business Situation" rolling 12 months, n=21

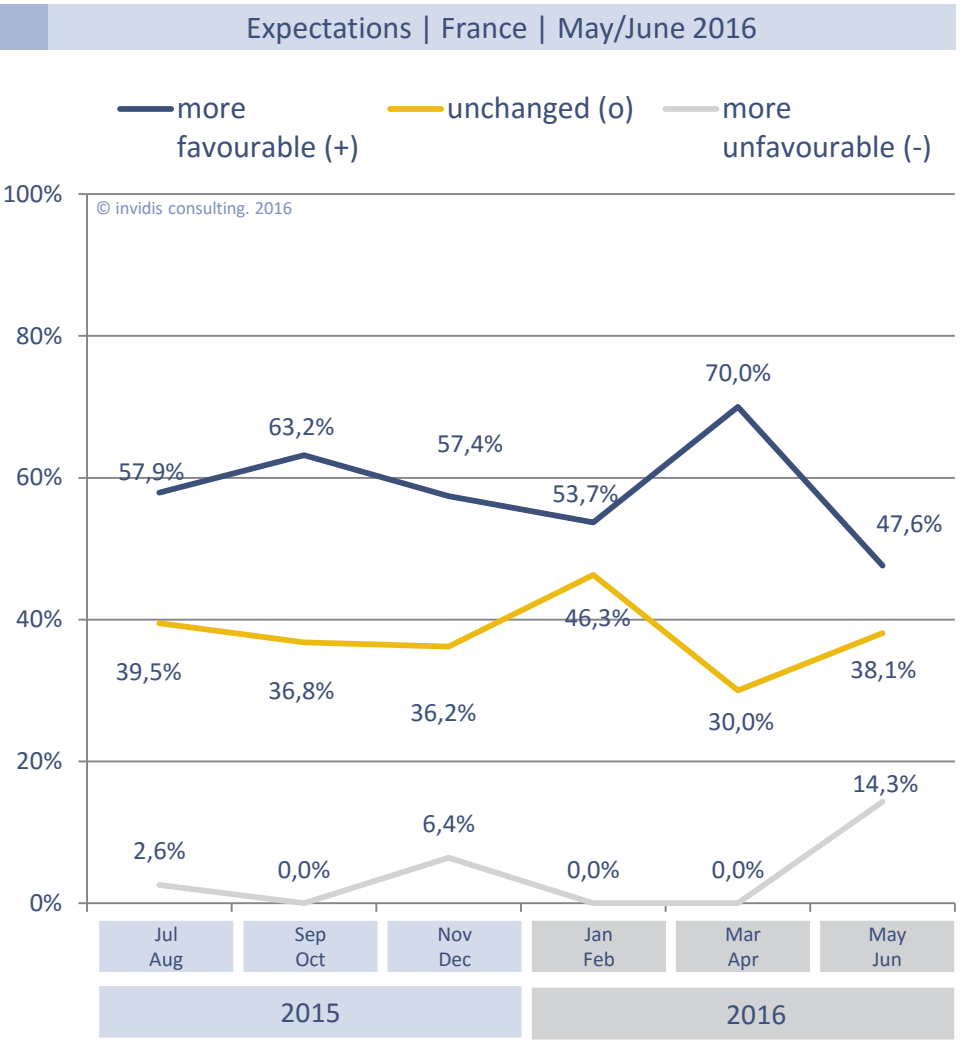


Fig. 3: DBCI France May | June 2016 „Expectations" rolling 12 months, n=21

Windows in first, Linux challenges & Android picks up speed

***Question**: How high was the percentage of operating systems used in Digital Signage Projects in 2015?*

Windows is implemented most frequently with Digital Signage projects. However other operating systems have significantly gained ground in the last two years.

Particularly Linux based installations are becoming more and more popular. Here cost and security issues are dictating the decisions. With Digital Signage installations becoming more varied in size and required performance, the appliances running on a non-PC architecture like Raspberry Pi, Cisco, BrightSign, Spinetix etc. are more widely integrated.

Cost effective systems operating on Android or SoC basis currently have the highest dynamic in the market. Still many security and performance issues remain.

Apple operating systems could establish a robust nice segment. However, many managers with IT responsibility dismiss it as an operating system for Digital Signage installations.

Market share of IT operating systems in Digital Signage installations 2015

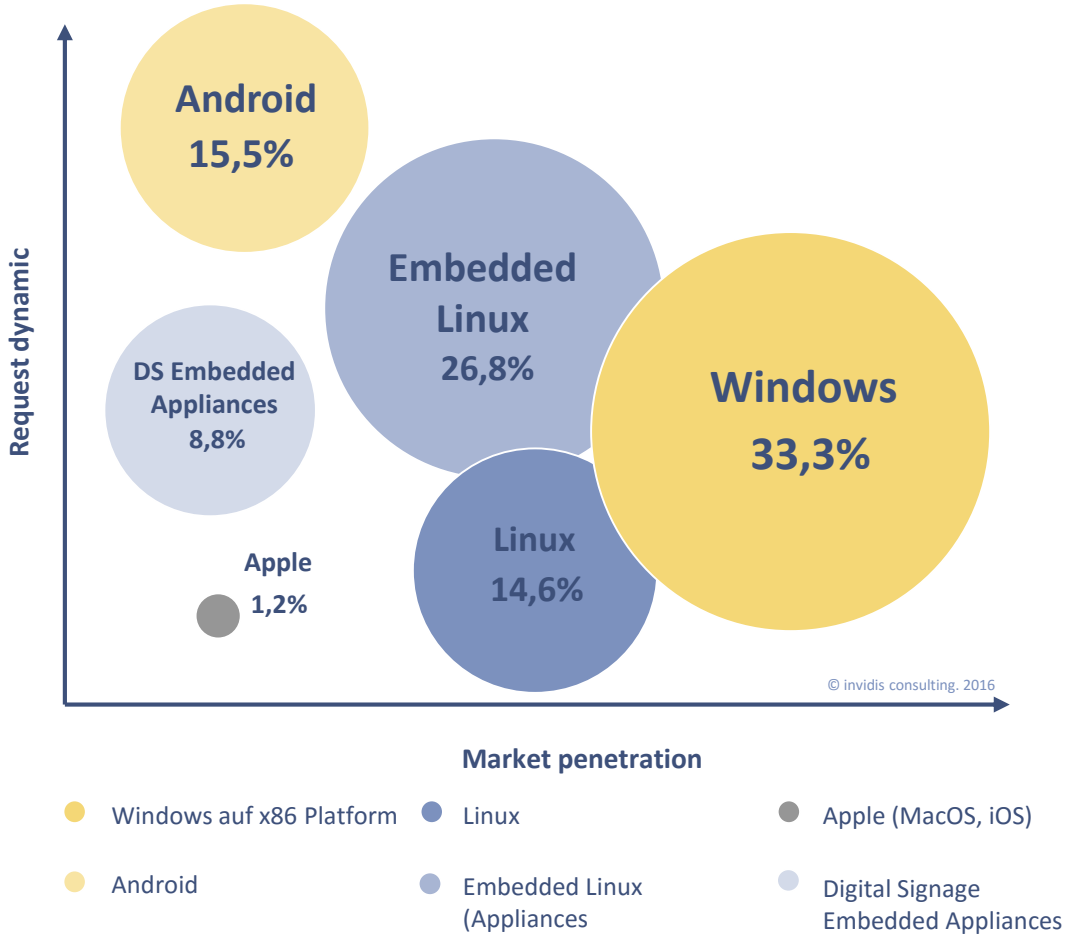


Fig. 5: DBCI France May | June 2016 "operating systems 2015", n=13

DBCI | Roadmap 2016 & Contact

2016	
January	
February	
March	
April	
May	
June	
July	**DBCI Jul./Aug. | WN31**
August	
September	**DBCI Sep./Oct. | WN40**
October	
November	**DBCI Nov./Dec. | WN49**
December	

OVAB Europe will be rebranded as **Digital Signage Federation Europe** starting with the 1st April 2016

- The next survey will take place in calendar weeks 29-30
- The next planned publication will be in week 31
- The DBCI is polled by invidis consulting and published in cooperation with DSF 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 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