France
2nd Quarter 2017

DBCI

**Digital Signage & DooH
Business Climate Index**

Cooperation Partner France

Club du
Digital
Media

invidis research
2017 FR 200

**The pulse of the Digital Signage
and DooH industry**

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Volatille business sentiment in the Digital Signage market in France
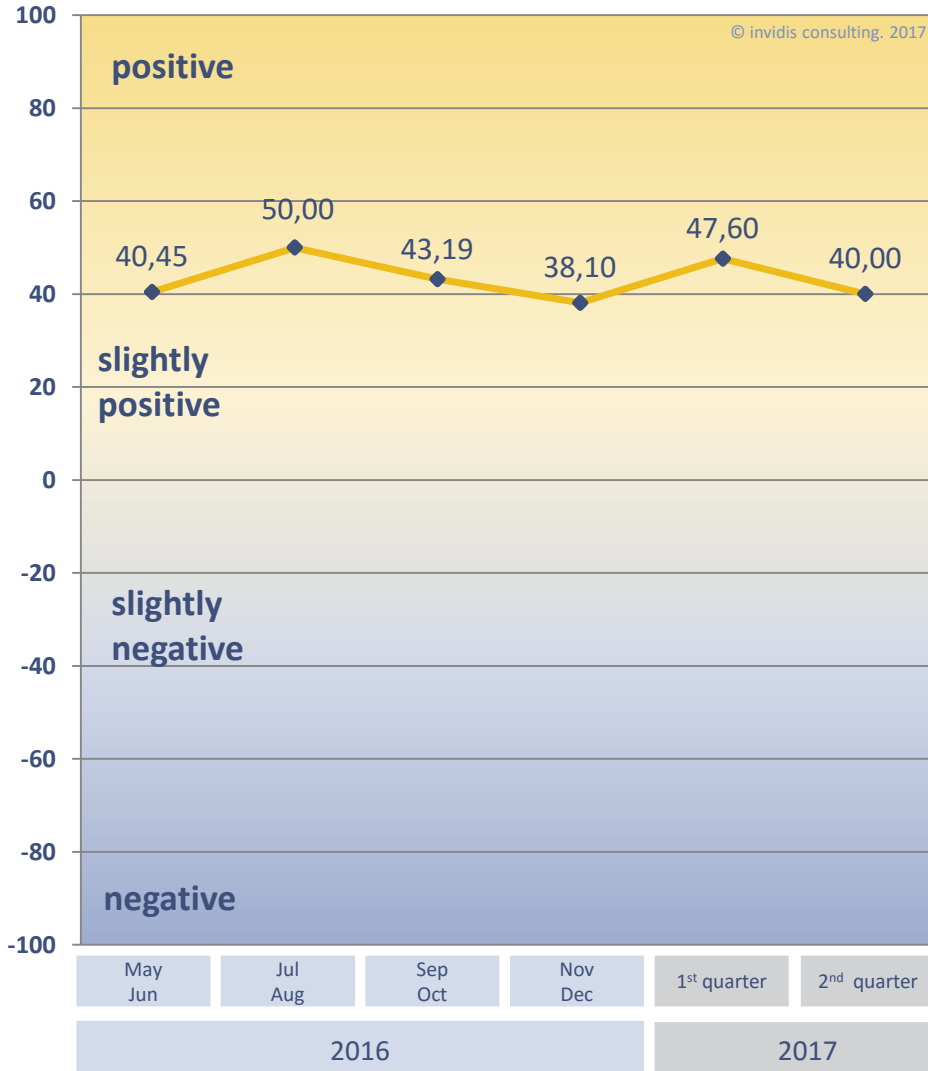

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Fig. 1: DBCI France 2nd Quarter 2017, n=20

- The Digital Signage Business Climate Index has slightly decreased, but still remains on a positive level in the second quarter of 2017. The index fell by 7,60 base points from 47,60 points to 40,00 base points.

- With good answers increasing by 3% the assessment of the current business situation has become more positive then in the previous survey.

- In contrast the outlook towards the near future is on a decline. Now only 50% of the surveyed companies are expecting an *more favourable* business situation for their products and services in the next six months.

Further Research

- Microsoft Windows is still the major player in the OS market for Digital Signage installations. However, Linux is gaining traction and was implemented in 28% of all projects in 2016.

change DBCI 2017 #2	*year-on-year*	*previous survey*
	-15,8%	-16,0%

Participants: n=20; Region: FR; Survey Period: 2017 calendar weeks 14-15

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Good current business situation and much more conservative outlook
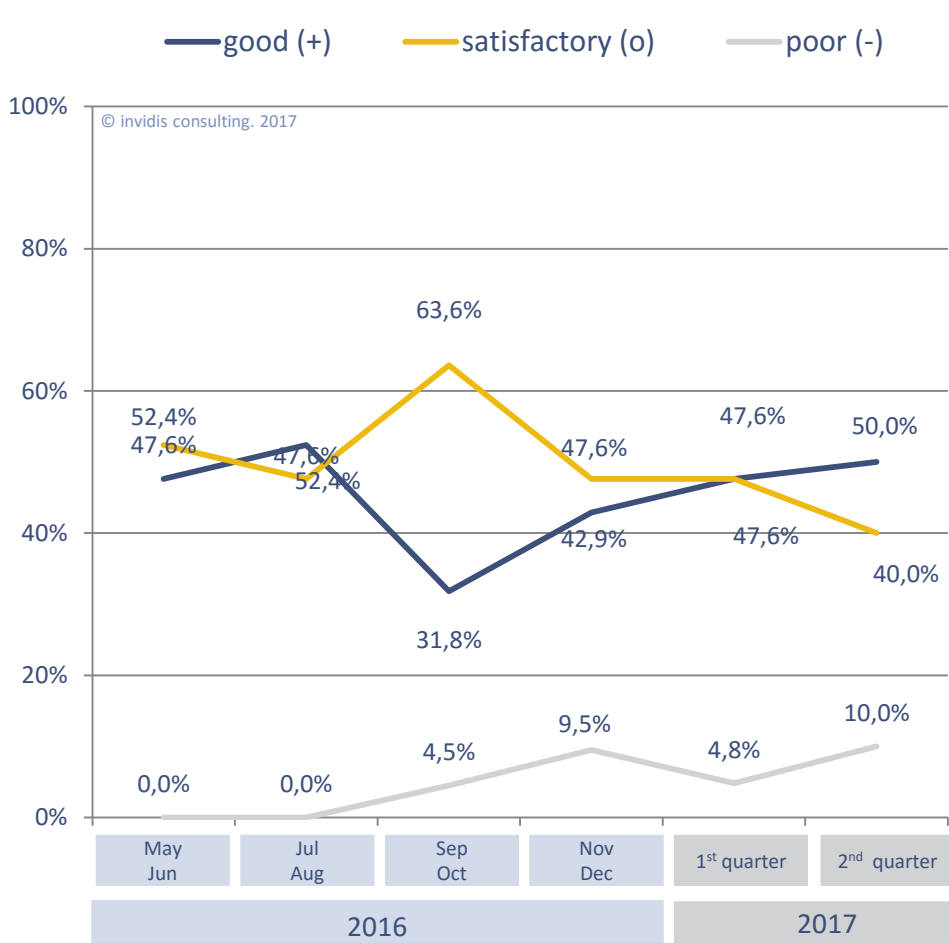

Fig. 2: DBCI France DBCI 2nd Quarter 2017 „Business Situation" rolling 12 months, n=20
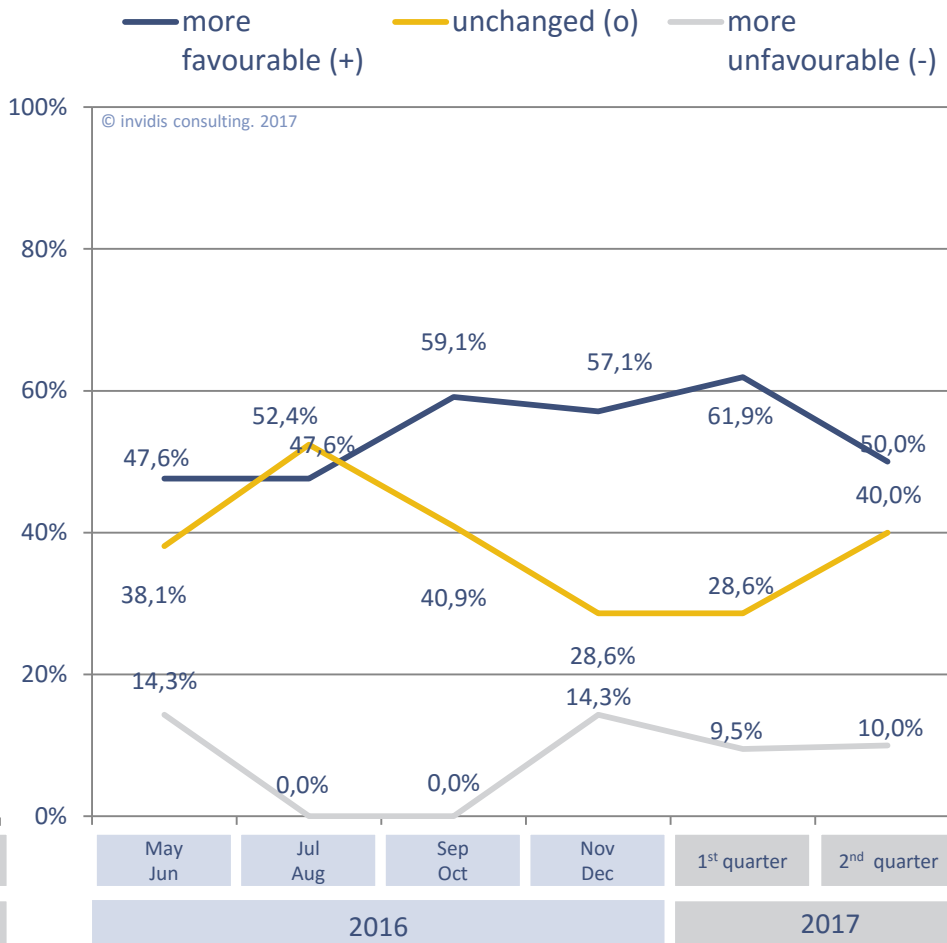
Fig. 3: DBCI France DBCI 2nd Quarter 2017 „Expectations" rolling 12 months, n=20

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OS 2016 | Windows in first and Linux challenges

Question: How high was the percentage of operating systems used in Digital Signage Projects in 2016?

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 consistently 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.

Also cost effective systems operating on Android 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.

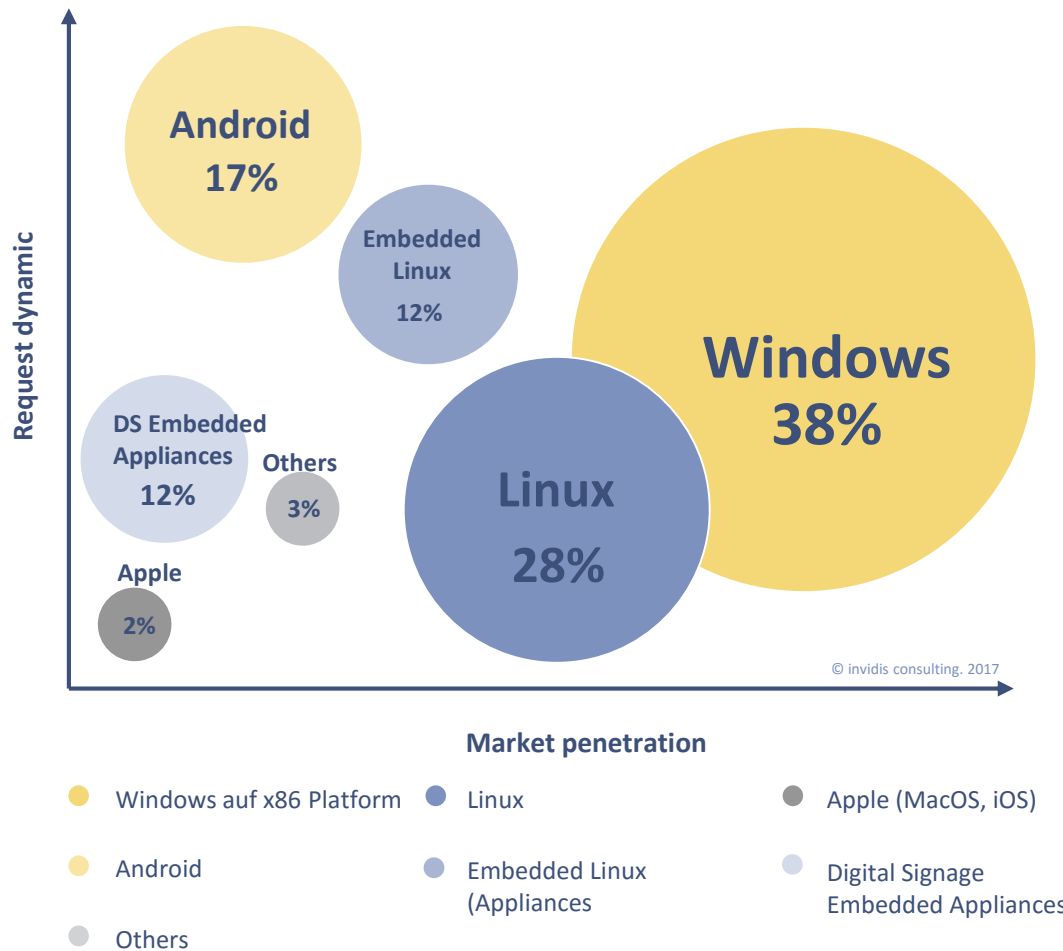Market share of IT operating systems in Digital Signage installations 2016

- ● Windows auf x86 Platform
- ● Linux
- ● Apple (MacOS, iOS)
- ● Android
- ● Embedded Linux (Appliances
- ● Digital Signage Embedded Appliances
- ● Others

Fig. 4: DBCI 2nd Quarter 2017 "operating systems 2016", n=19

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Roadmap 2017 & Contact

2017
January
February
March
April
May
June
July
August
September
October
November
December

3rd quarter | 2017

4th quarter | 2017

- The DBCI has recalibrated its iteration from a two month periode to a tree month periode starting in 2017

- The next survey will take place in calendar weeks 32-33 of 2017. The next planned publication date will be in September 2017

- 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 2017. For further information please contact Daniel Russell.

invidis consulting
invidis is a renowned boutique consulting and research house based in Munich. Delivering actionable information and advise to customers across EMEA.

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DSS | The Digital Signage Summit series

- «Digital Signage Summit» is the leading event series for digital signage conferences in EMEA and North America
- 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

- Join us at one of our upcoming events in
    - DSS Orlando | Orlando: 14/16. June 2017
    - DSS Europe | Munich: 5.-6. July 2017
    - DSS MENA | Dubai: September 2017
    - DSS Russia | Moscow: October 2017
    - DSS Africa | Johannesburg: October 2017
- More information at digitalsignagesummit.org