

France
January | February 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 100


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 DBCI - Introduction

- The OVAB Europe **Digital Signage Business Climate Index (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** – second poll January | February 2015:
 - France is the 3rd largest market for Digital Signage in Europe
 - DBCI France: **58,99 base points**
 - **88,5%** record a **satisfying** or **good** business sentiment
 - Over **73,8%** expect a **more favourable** business situation within the next six months

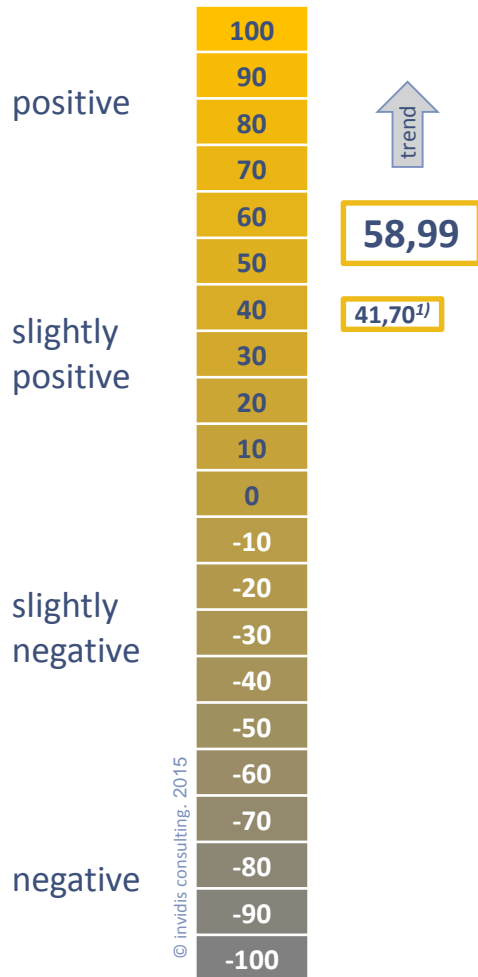


Source: TMM

Share	Market	Growth ^{*)}
22%	DE AT CH	>30%
16%	UK IE	>10%
12%	FR	>10%
10%	DK NO SE FI	>20%
8%	BE NL LU	>5%

1) Yoy 2012/13
Source Meko

 Good business sentiment & very positive outlook for 2015



- The digital Signage Business Climate Index France has been polled for the second time. The Index has increased from 41,70 base points by 17,29 points to 58,99 base points
- The DBCI reflects the current positive business sentiment of the Digital Signage industry in France
- Almost 90% of the polled companies are satisfied or rate their current business climate as good
- The market expects even more favourable conditions for their business within the next six month. 73% of the survey participants have this view
- The year 2014 saw a clear increase in customer demand for Digital Signage solutions. With declining CAPEX and a rising professionalization in the industry more and more customers started investing in Digital Signage
- Together with a further development of DooH networks this drove revenues up for the Digital out of Home and Digital Signage market participants

Survey facts

- Participants: n=61
- Region: France
- Time frame: 2014 calendar weeks 3-4

Fig. 1: DBCI France January/February 2015, n=61
1) DBCI France November/December 2014

 High satisfaction with the current business situation

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

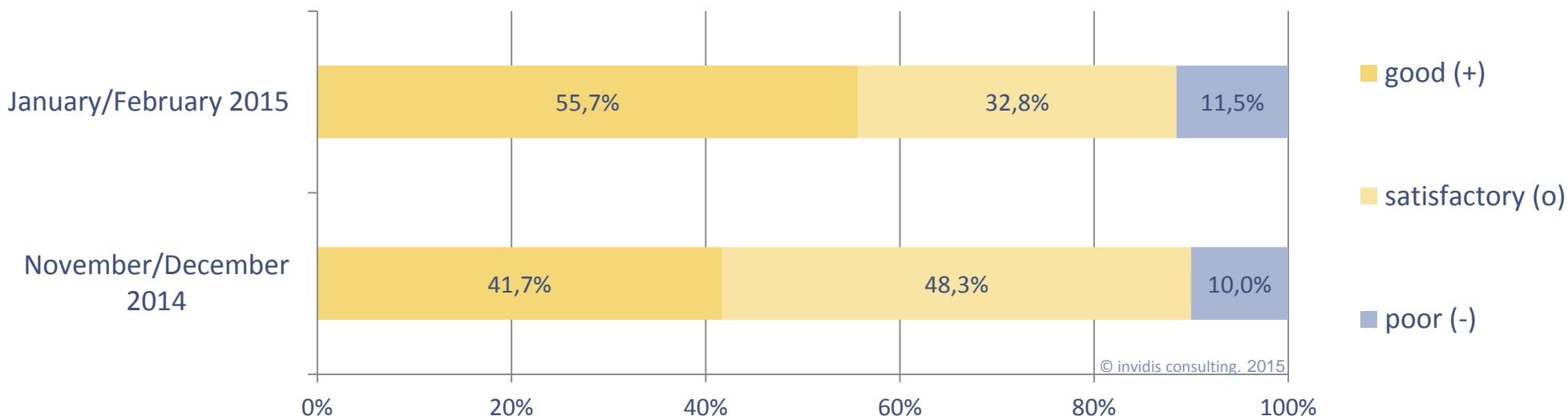


Fig. 2: DBCI France January/February 2015 "business situation", n=61

 Digital Signage industry expects very good year in 2015

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

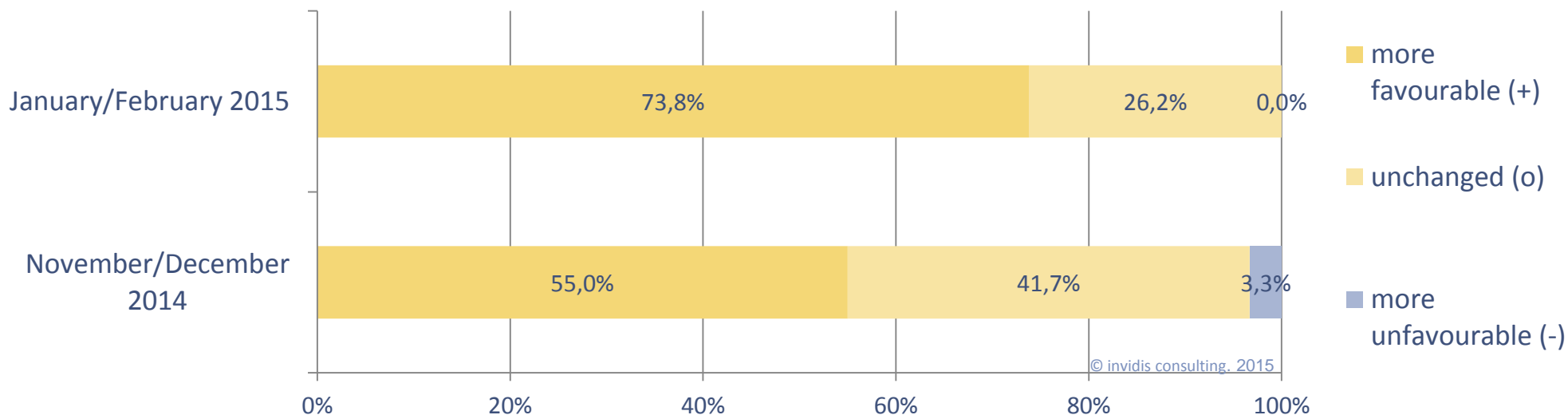


Fig. 3: DBCI France January/February 2015 "business expectations", n=61

 Hirings 2014 | Digital Signage creates hundreds of new jobs

- **69,8%** percent of all companies in the Digital Signage Market have hired new staff in the last year
- In the year 2014 between **200-250 new jobs** were created in the Digital Signage market in France
- The high customer demand in 2014 has led to more projects being realised and thus the companies had to invest in human capital to stem all new obligations
- As a whole there is a high demand for qualified personnel. Due to a growth strategy and re-structuring 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 2014

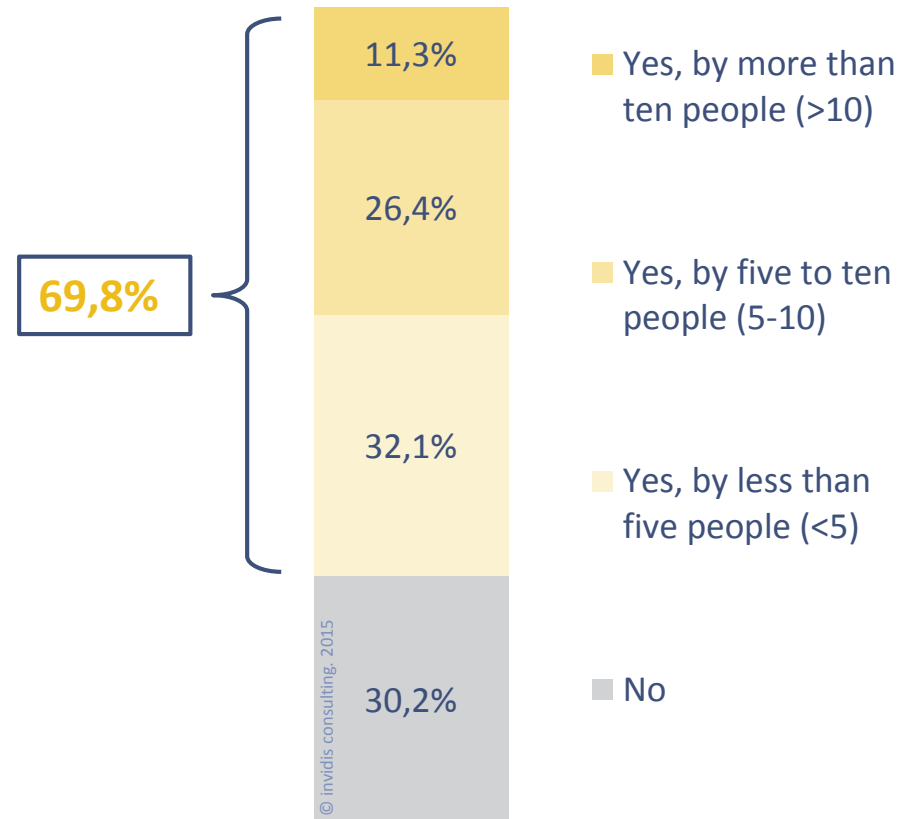


Fig. 4: DBCI France January/February 2015
"Hirings 2014 France", n=53

 **Tops 2014 | Strong growth in revenues and customer demand highlight of 2014**



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Fig. 5: DBCI January/February 2015 „Tops 2014“ size stands for statistical significance, n=28

 Flops 2014 | Legal restrictions, bureaucracy and low content quality dampen the mood



Fig. 6: DBCI January/February 2015 „Flops 2014“ size stands for statistical significance, n=22

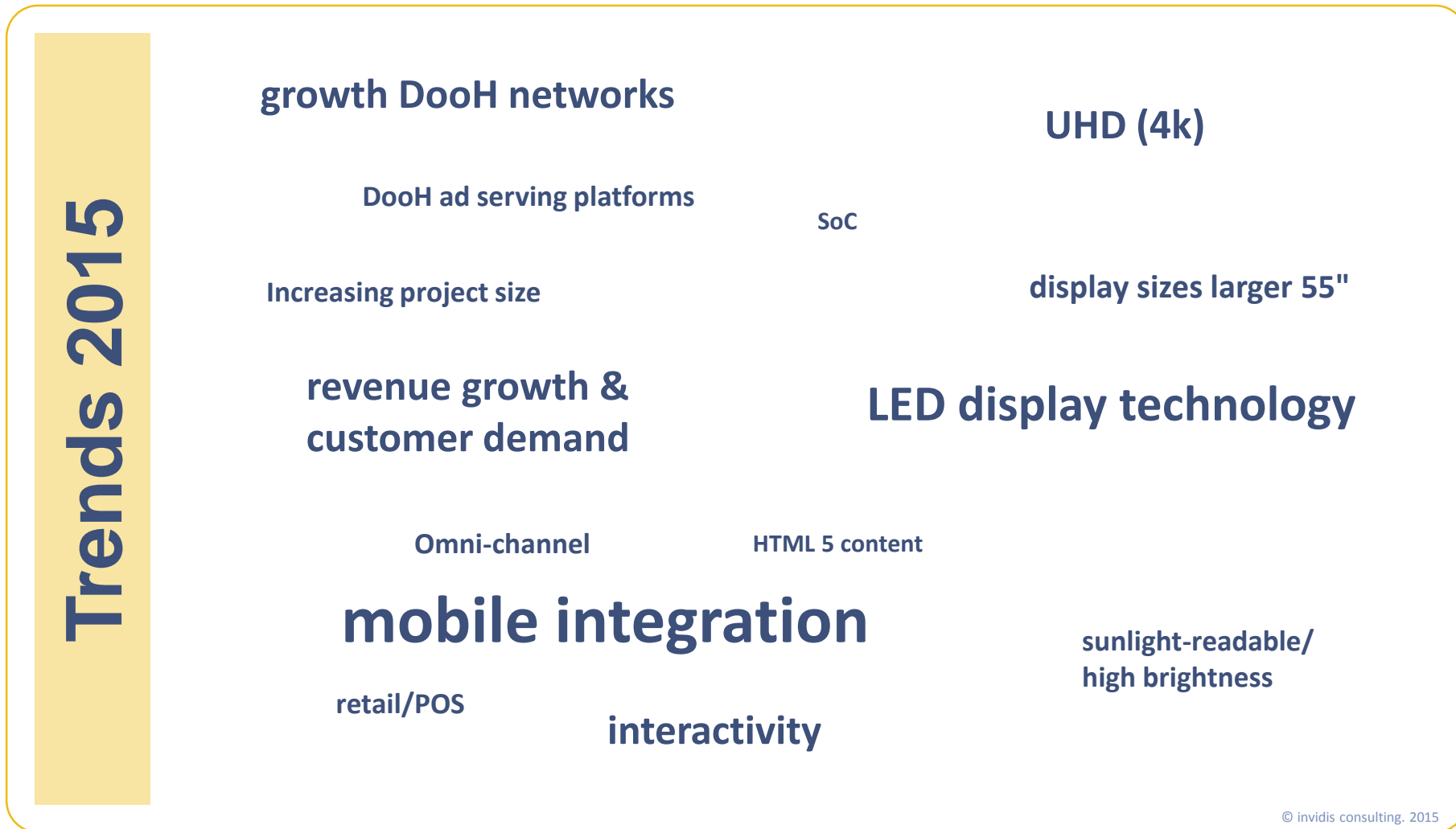


Fig. 7: DBCI January/February 2015 „Trends 2015“size stands for statistical significance, n=44

DBCI | Roadmap 2015 & Contact

2015	
January	
February	
March	← Mar./Apr. 25.03.2015
April	
May	← May/Jun. 20.05.2015
June	
July	← Jul./Aug. 22.07.2015
August	
September	← Sept./Oct. 15.09.2015
October	
November	← Nov./Dec. 18.11.2015
December	

- The next survey will take place in calendar week 10-11 of 2015
- The next planned publication date will be the 23rd of March 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 | Junior 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