

France
September | October 2015

DBCI

The pulse of the Digital Signage
and DooH industry

OVAB Digital Signage & DooH
Business Climate Index

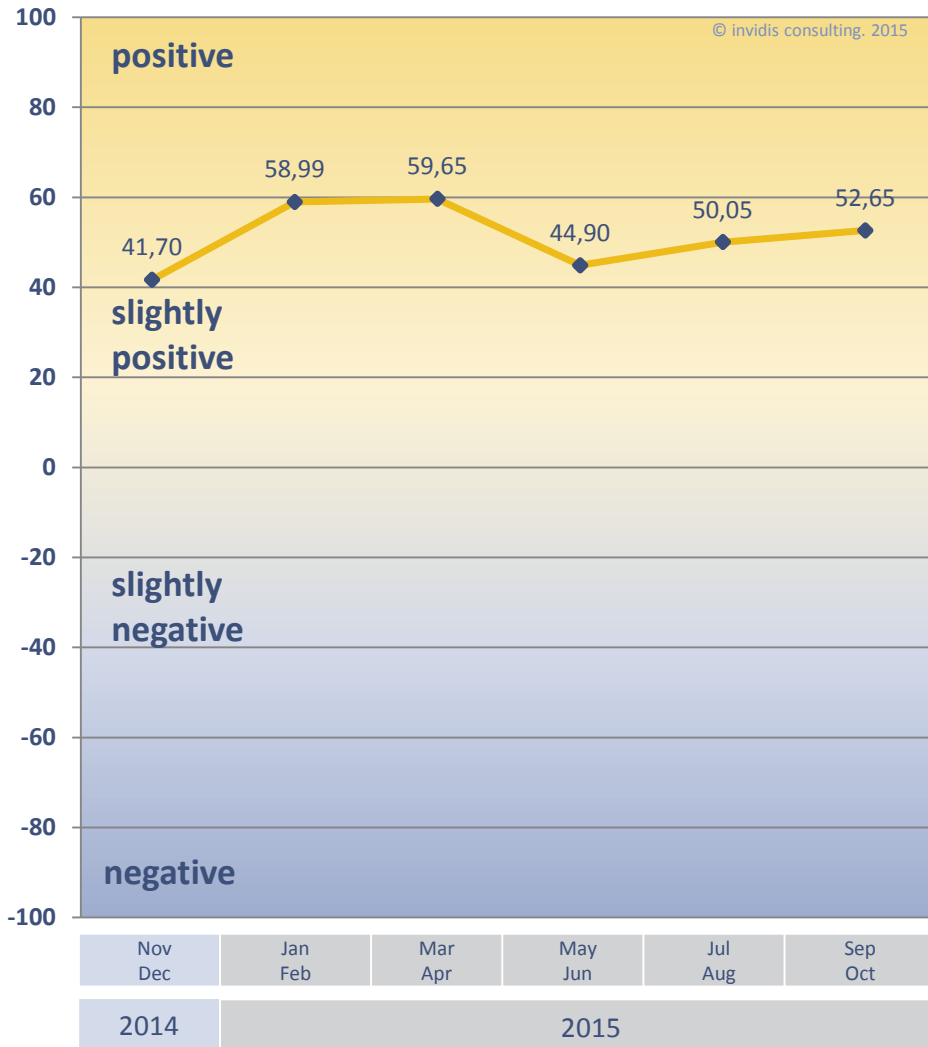
Cooperation Partner France

**Club du
Digital
Media**

invidis research
2015 FR 500


invidis
CONSULTING

 Digital Signage business sentiment starting a positive trend towards the end of the year



- The digital Signage Business Climate Index France has been polled for the sixth time. The Index has increased by 2,60 base points from 50,05 base points to 52,65 base points.
- The DBCI reflects the current positive business sentiment of the Digital Signage industry in France
- Over 90% of the polled companies are satisfied or rate their current business climate with *good*. While only 5% see their situation as *negative*.
- With 63,2% the answers for *more favourable* business conditions within the next six month has increased

Further Research

- Almost 90% of the polled companies in France expect to have a growth in revenues in 2015 compared to 2014
- Still 15,8% of all polled companies had to accept a decline in revenues in the first six months of 2015. However some of those companies are expecting to have balance the losses at the end of the year

Participants: n=38; Region: FR; Survey Period: 2015 calendar weeks 35-36

Fig. 1: DBCI France September | October 2015, n=38

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?

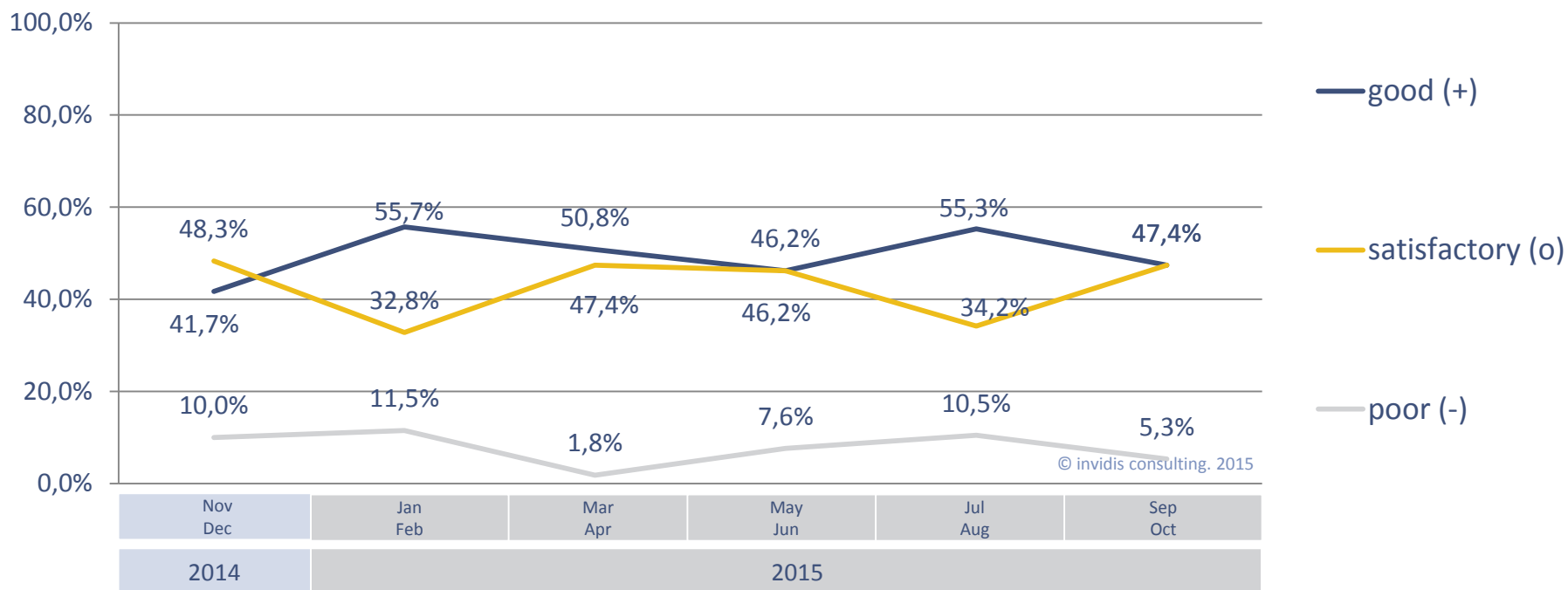


Fig. 2: DBCI France September | October 2015 "business situation", n=38

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

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

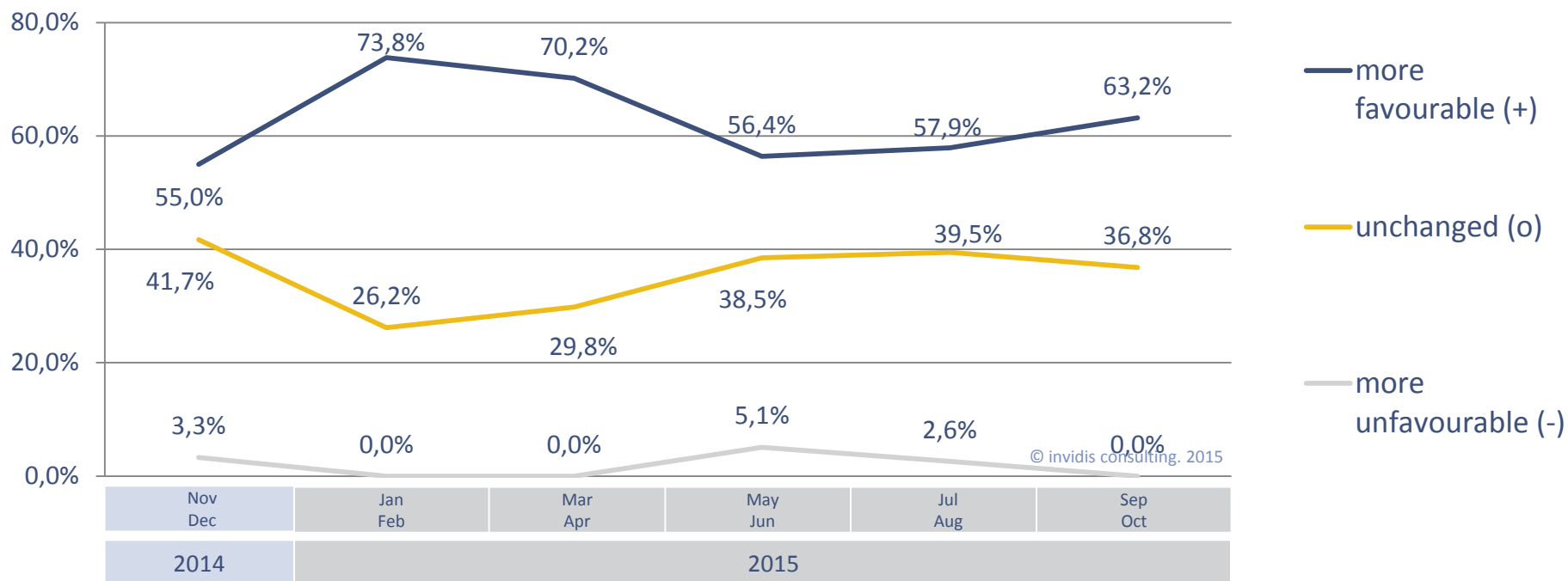


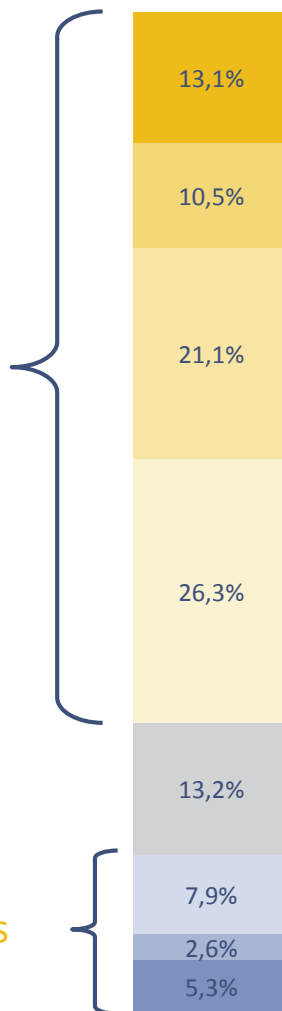
Fig. 3: DBCI France September | October 2015 "business expectations", n=38

Further research | First semester 2015 with considerably higher revenues than 2014

“The revenues in the first half year 2015 have ... in comparison to the revenues of the same period in the previous year.”

71,1% of all polled companies could generate in parts a clear **increase in revenues** in the first half year term in 2015 compared to the same period in the previous year

Only **15,8%** of all polled companies had to accept a **decrease in revenues** compared to the previous year



Legend

- grown very strong (more than +20%)
- grown strong (+10% to +19%)
- grown moderately (+5% to +9%)
- grown slightly (+1% to +4%)
- unchanged (+/-0%)
- decreased slightly (-1% to -4%)
- decreased moderately (-5% to -9%)
- decreased strong (-10% to -19%)
- decreased very strong (more than -20%)

Fig. :4 DBCI France September | October 2015 “revenues H1 2014-2015”, n=38

Further research | Clear increase in revenues expected for the full year 2015

“The revenues in 2015 will ... compared to the revenues in 2014.”

89,5% of all polled companies are expecting a healthy **growth** in **revenues** for the year 2015 compared with the previous year

Only 7,8% of all polled companies expect a **decrease** in **revenues** compared to the pervious year

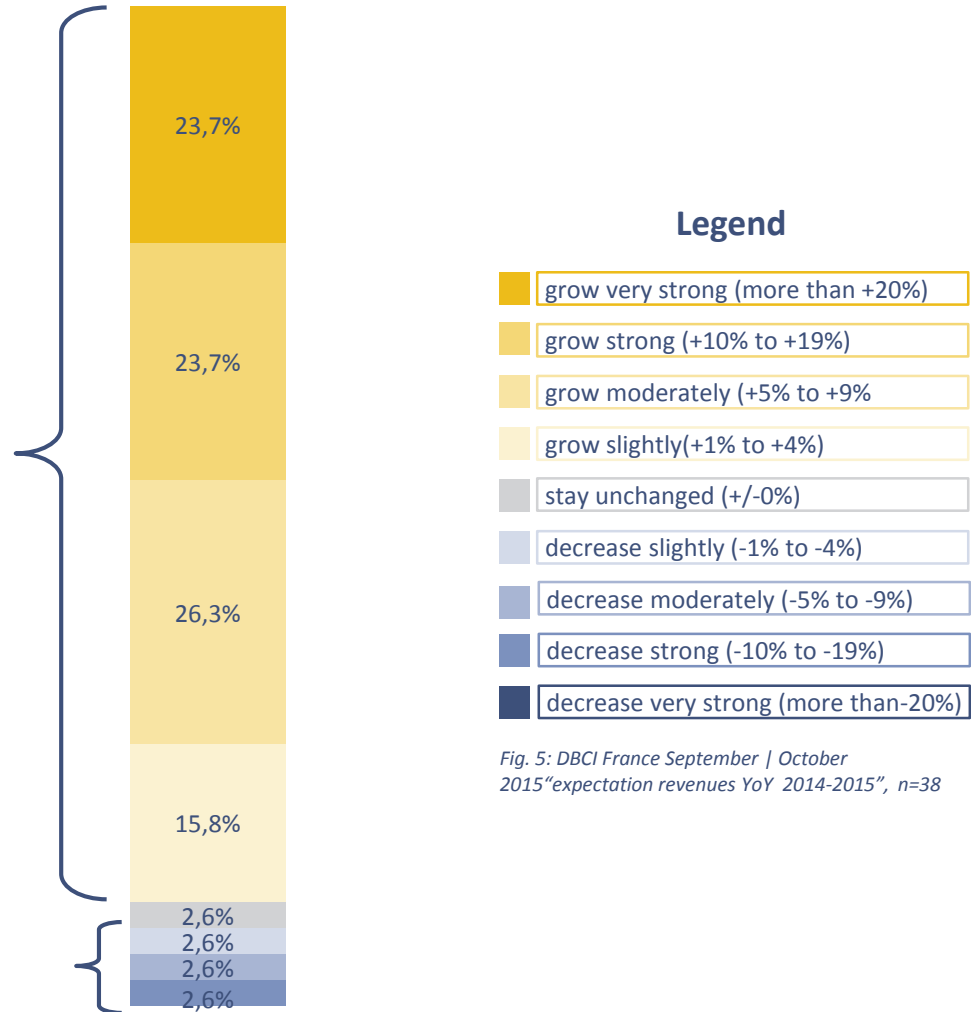
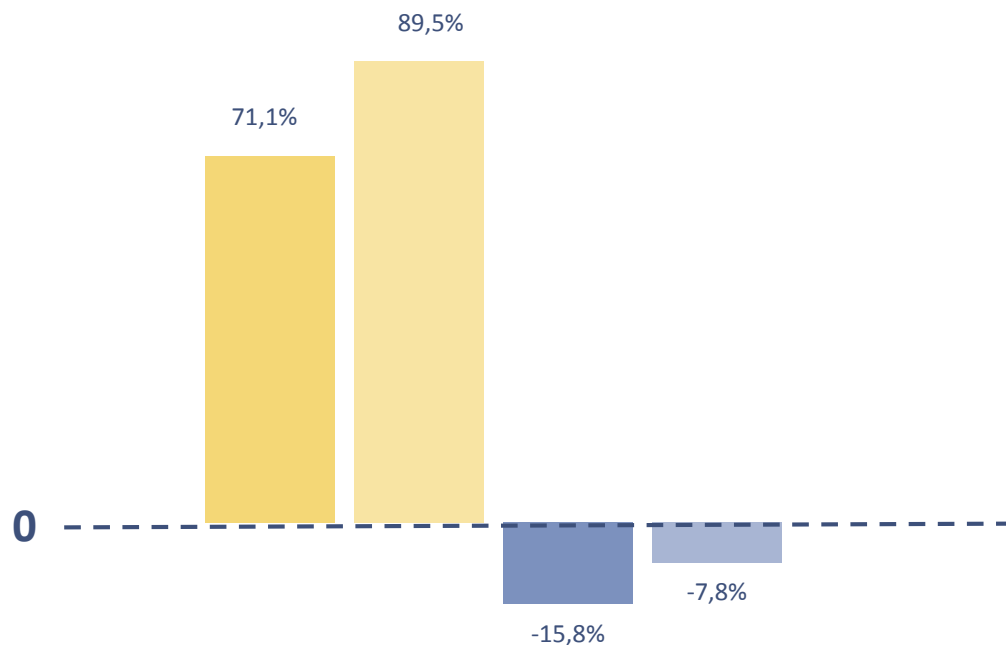


Fig. 5: DBCI France September | October 2015 "expectation revenues YoY 2014-2015", n=38

 Further research | Losses from the first semester expected to be contained



Percentage of polled companies which have registered a growth respectively a decline in revenues in H1 2015, compared to the same period in the previous year

- YoY H1 2014-2015 growth
- YoY 2014-2015 growth expected
- YoY H1 2014-2015 decrease
- YoY 2014-2015 decrease expected

Fig. 6: DBCI France September | October 2015 "revenues YoY H1 2014-2015 and YoY 2014-2015", n=38

- Almost 90% of the polled companies in France expect to have a growth in revenues in 2015 compared to 2014
- Still 15,8% of all polled companies had to accept a decline in revenues in the first six months of 2015. However some of those companies are expecting to have balance the losses at the end of the year
- Traditionally the IT business has a relative calm period in the summer, followed by a strong showing towards the end of the year

 DBCI | Roadmap 2015 & Contact

2015
January
February
March
April
May
June
July
August
September
October
November
December

← **Nov./Dec. | 2015/11/18**

- The next survey will take place in calendar week 44-45 of 2015
- The next planned publication date will be the 15th of September 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

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