France

July | August 2016

DBCI

The pulse of the Digital Signage and DooH industry

Digital Signage & DooH Business Climate Index

Cooperation Partner France

invidis research
2016 FR 400

July comes with better business sentiment for the Digital Signage market

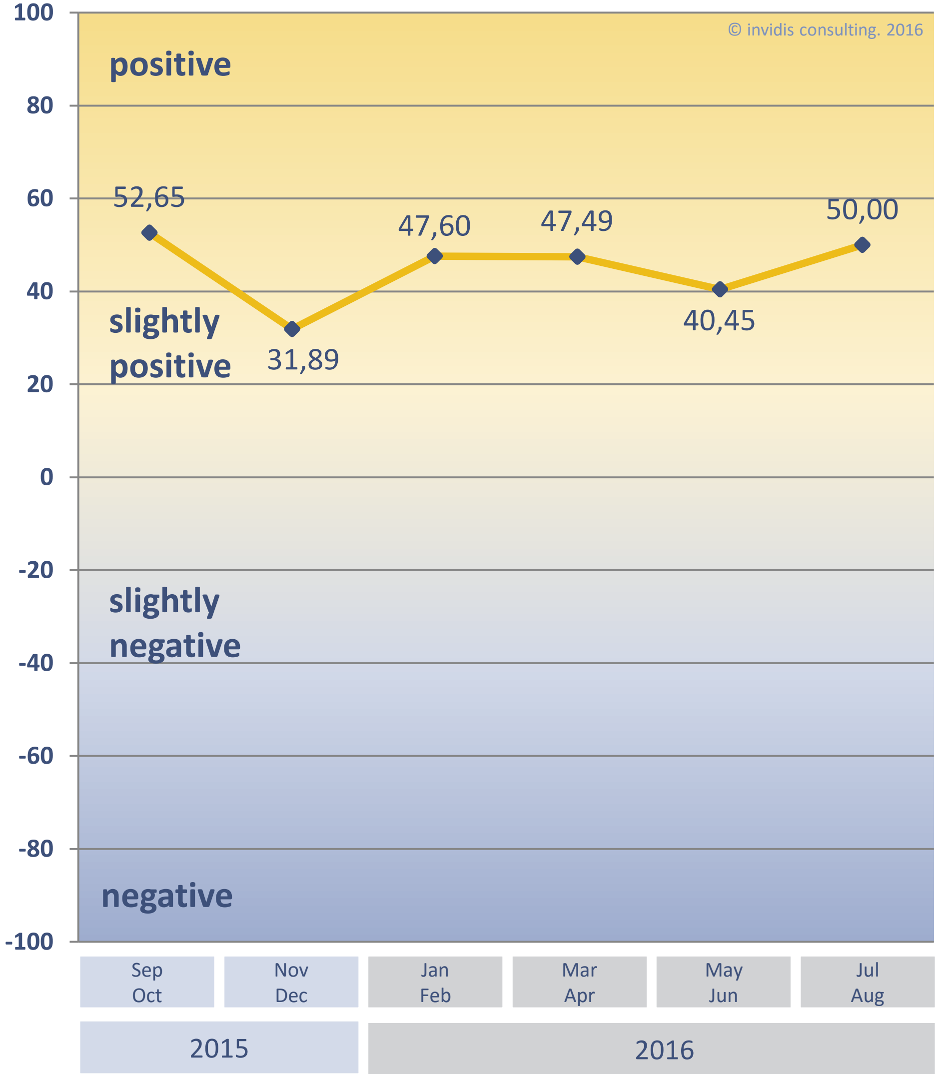


Fig. 1: DBCI France July | August 2016, n=21

- The Digital Signage Business Climate Index has increased by 9,55 base points from 40,45 points to 50,00 base points. In total the Index is flat with a nominal decline by 0,1% year-on-year and it is up by 23,6% compared to the previous survey.
- The current business situation shows an enhanced sentiment - with *good* ratings reaching over 50%.
- The outlook towards the near future registered an increase of the neutral in favour of the negative expectations. Now more then half of the surveyed companies are expecting an *unchanged* business situation for their products and services in the next six months.

Further Research

- Over 90% of the polled companies in Germany, Austria and Switzerland expect growing revenues in 2016. Still 9% of the market participants recorded a decline in revenues in the first two quarters of 2016. However all of those companies are expecting to balance out the losses at the end of the year.
- The market is not overly concerned by the prospect of an economic fallout due to the Brexit vote in Great Britain

	year-on-year	*previous survey*
change DBCI 2016 #4	-0,1%	+23,6%

Participants: n=21; Region: FR; Survey Period: 2016 calendar weeks 29-30

Increased current business situation, but more conservative outlook

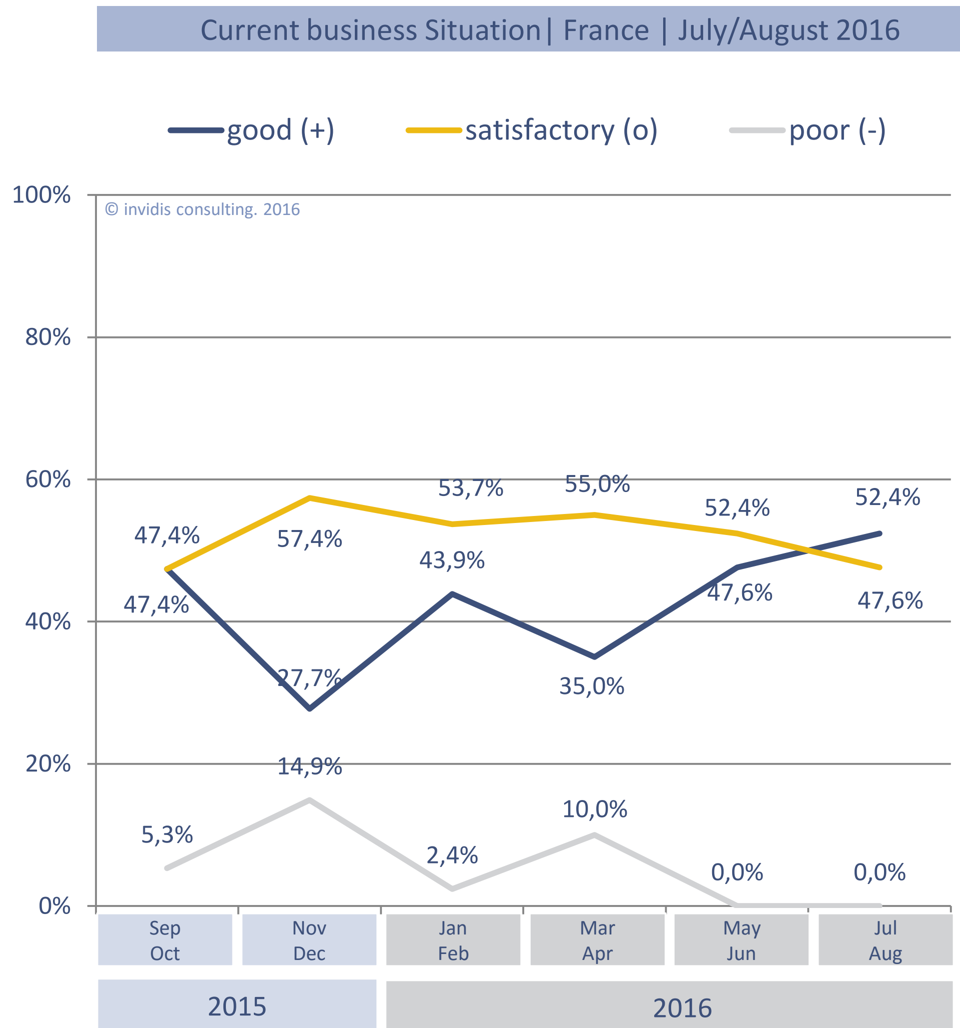


Fig. 2: DBCI France July | August 2016 „Business Situation" rolling 12 months, n=21

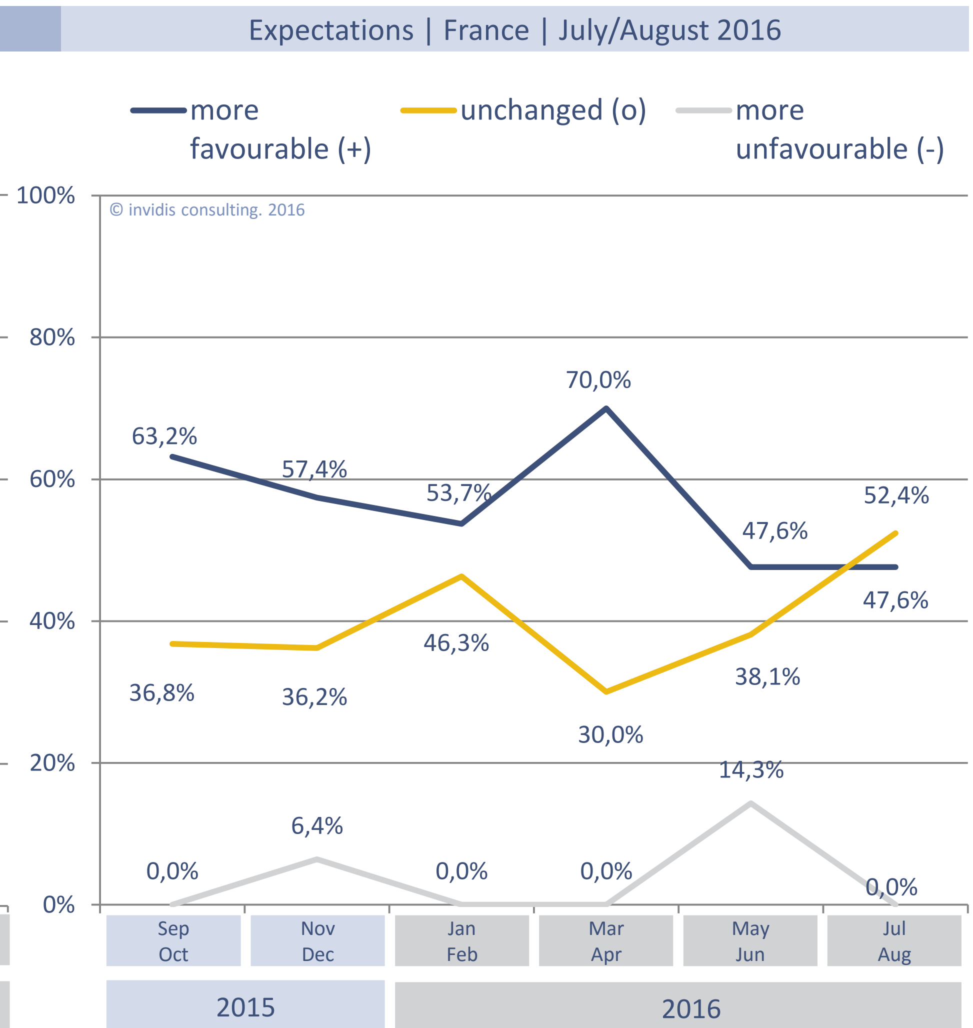


Fig. 3: DBCI France July | August 2016 „Expectations" rolling 12 months, n=21

Further research| First semester 2016 with considerably higher revenues than 2015

"The revenues in the first half year 2016 have … in comparison to the revenues of the same period in the previous year."

90,9% of all polled companies could generate in parts a clear increase in revenues in the first half year term in 2016 compared to the same period in the previous year

Only 9,1% of all polled companies had to accept a decrease in revenues compared to the previous year

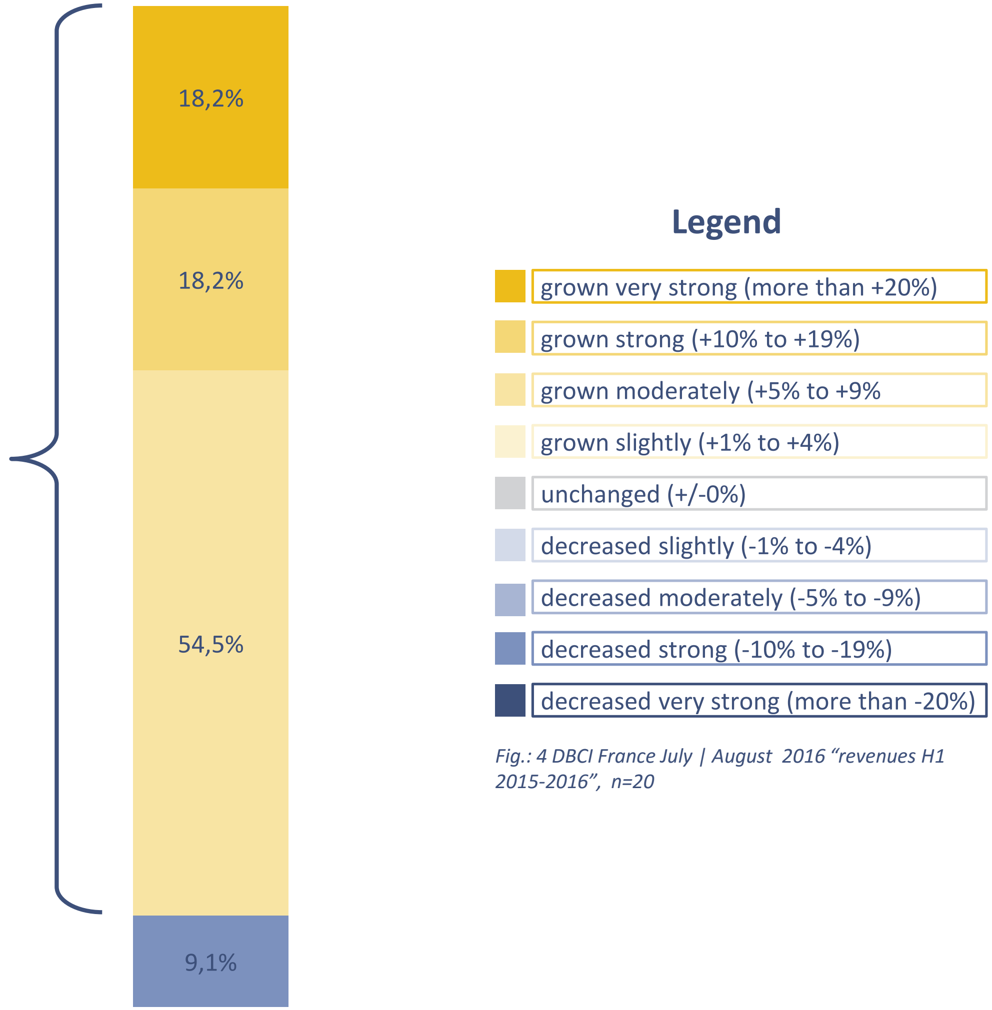


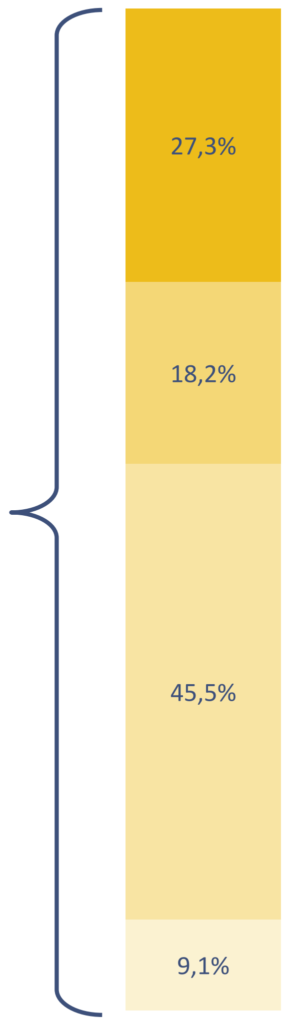
Fig.: 4 DBCI France July | August 2016 "revenues H1 2015-2016", n=20

Further research | Clear increase in revenues expected for the full year 2016

"The revenues in 2016 will … compared to the revenues in 2015."

All of the polled companies are expecting a healthy growth in revenues for the year 2016 compared with the previous year

Non of all polled companies expect a decrease in revenues compared to the pervious year

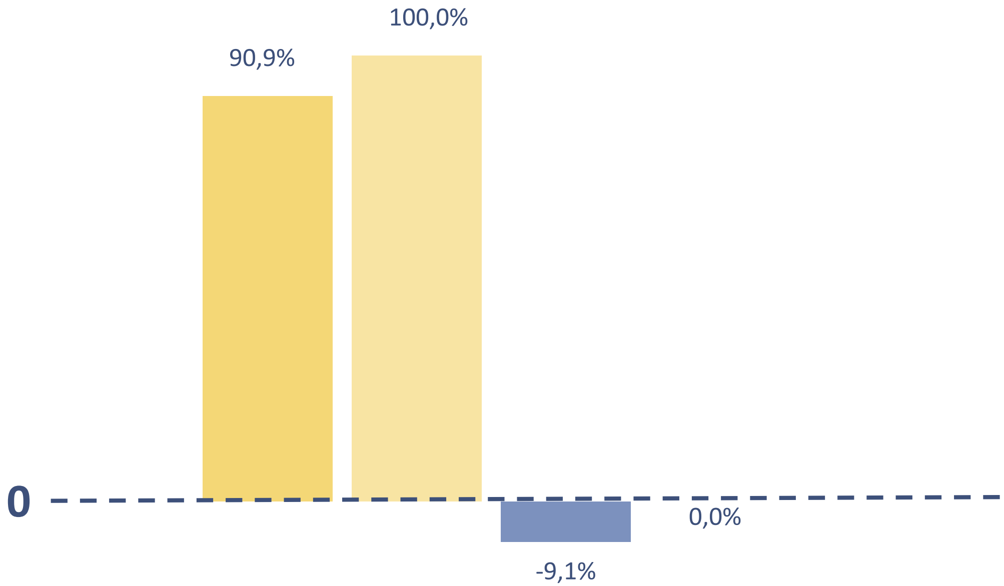


Legend

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

Fig.: 5 DBCI France July | August 2016 "expectation revenues YoY 2015-2016", n=20

Further research | First semester losses expected to be contained later this year



Percentage of polled companies which have registered a growth respectively a decline in revenues in H1 2016, compared to the same period in the previous year

- YoY H1 2015-2016 growth
- YoY 2015-2016 growth expected
- YoY H1 2015-2016 decrease
- YoY 2015-2016 decrease expected

Fig.: 6 DBCI France July | August 2016 "revenues YoY H1 2015-2016 and YoY 2015-2016", n=20

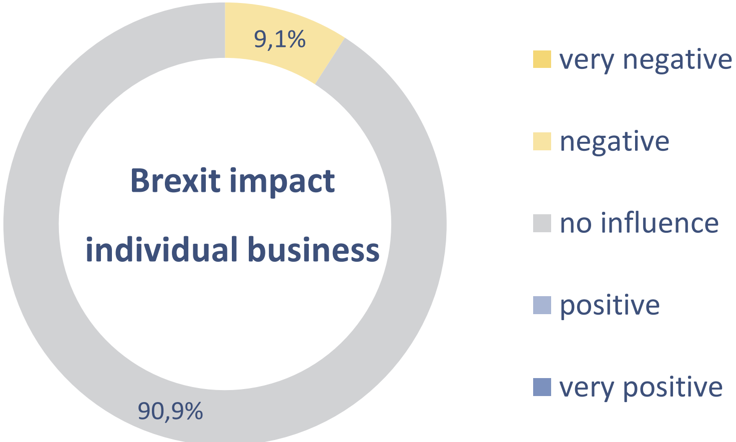
- Over 90% of the polled companies in France expect to have a growth in revenues in 2016 compared to 2015
- Still 9% of all polled companies had to accept a decline in revenues in the first six months of 2016. However all of those companies are expecting to have balanced the losses at the end of the year
- Traditionally the IT business has a relative calm period in the summer, followed by a strong showing towards fourth quarter

Further research | Brexit with only limited influence on Digital Signage market in DACH

***Question 1**: How do you expect the Brexit will influence your company/business?*

***Question 2:** How do you expect the Brexit will influence your national Digital Signage and Digital out of Home market?*

- Over 90% of the polled companies are not overly concerned for their business by the prospect of an economic fallout due to the Brexit vote in Great Britain
- With 80% the percentage who see no influence is slightly lower for the assessment of the general Digital Signage and Digital-out-of-Home economy in France.
- The industry is still very much concentrated on a local or national region. Most companies have no or only loose business interests in Great Britain.
- Market participants who expect a negative influence are either dependent on exchange rates because of their purchasing policy or have customers respectively close business ties on the islands.



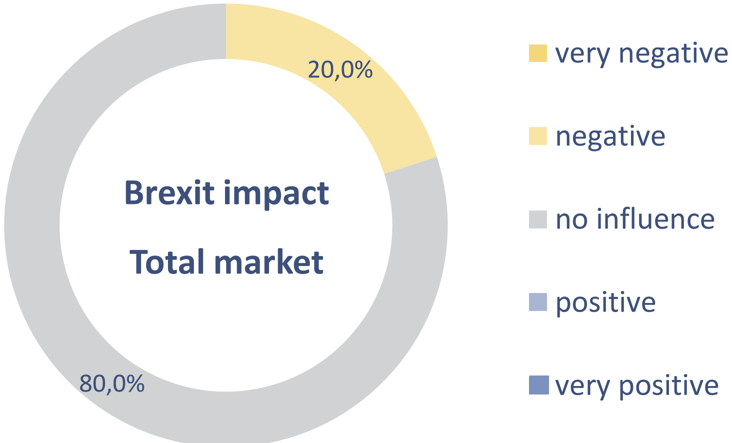


Fig. 7: DBCI France July | August 2016 "Brexit", n=19

DBCI | Roadmap 2016 & Contact

2016	
January	
February	
March	
April	
May	
June	
July	
August	
September	DBCI Sep./Oct. | WN41
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 38-39
- The next planned publication will be in week 41
- 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

THE LEADING DIGITAL SIGNAGE AND DIGITAL OUT OF HOME STRATEGY CONFERENCE 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

A JOINT VENTURE BETWEEN: Integrated Systems Events, invidis consulting