

France
1st Quarter 2017

DBCI

The pulse of the Digital Signage
and DooH industry



Digital Signage & DooH
Business Climate Index

Cooperation Partner France



invidis research
2017 FR 100



invidis
CONSULTING



**digital
signage
summit
europe**

05-06 JULY 2017
MUNICH
GERMANY

France Much increased business sentiment in the Digital Signage market in France



- The Digital Signage Business Climate Index in France has been on a positive trend starting in January 2017. Since the last survey the index has seen a nominal increase of 9,5 base points from 38,10 points to 47,60 base points. In total the Index is level year-on-year and up by 24,9% compared to the previous survey.
- The current business situation shows a much enhanced sentiment - with good and neutral ratings reaching parity.
- Also the outlook towards the near future registered a slight change towards the expectation of an increased business situation. Currently almost 62% of the surveyed companies are expecting a *more favourable* business situation for their products and services within the next six months.

Further Research

- 71,4% of all companies in the Digital Signage market in the France have hired new staff in 2016. In total between 100-150 new jobs were created.

	<i>year-on-year</i>	<i>previous survey</i>
change		
DBCI 2017 #1	+0,0%	+24,9%

Participants: n=21; Region: FR; Survey Period: 2017 calendar weeks 2-3

Conservative current business situation and much more positive outlook

Current business Situation | France | 1st Quarter 2017

Expectations | France | 1st Quarter 2017

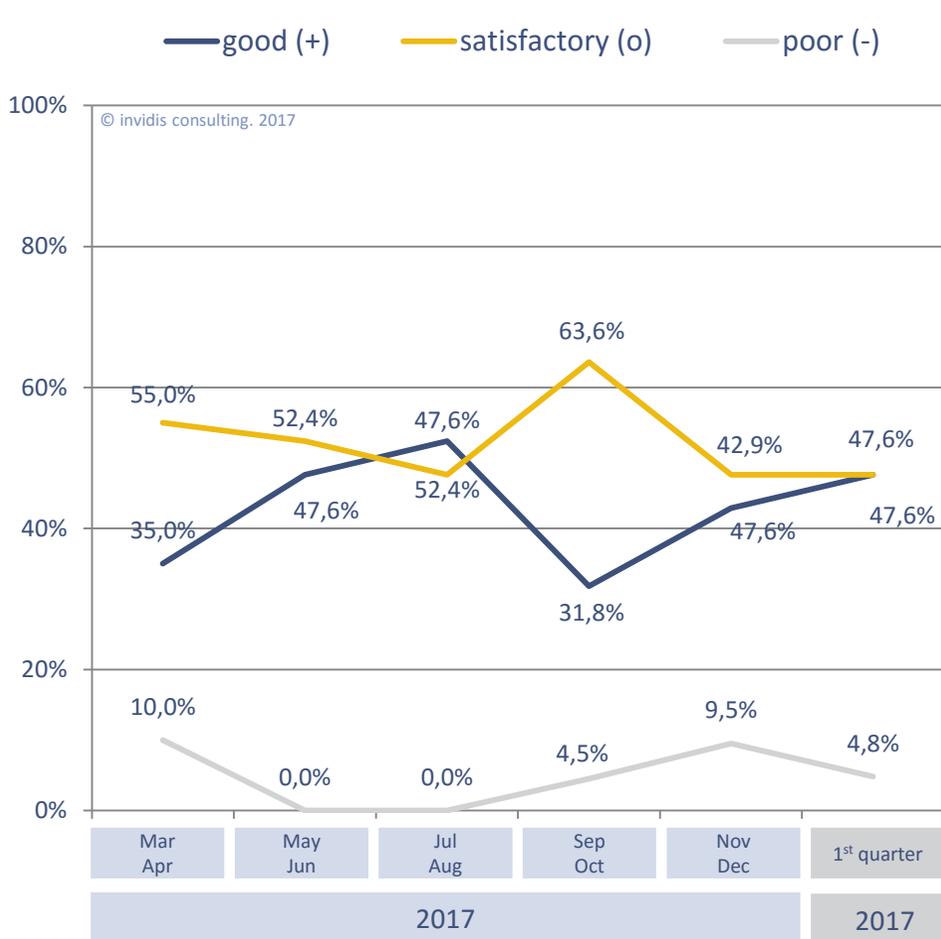


Fig. 2: DBCI France 1st Quarter 2017 „Business Situation“ rolling 12 months, n=21

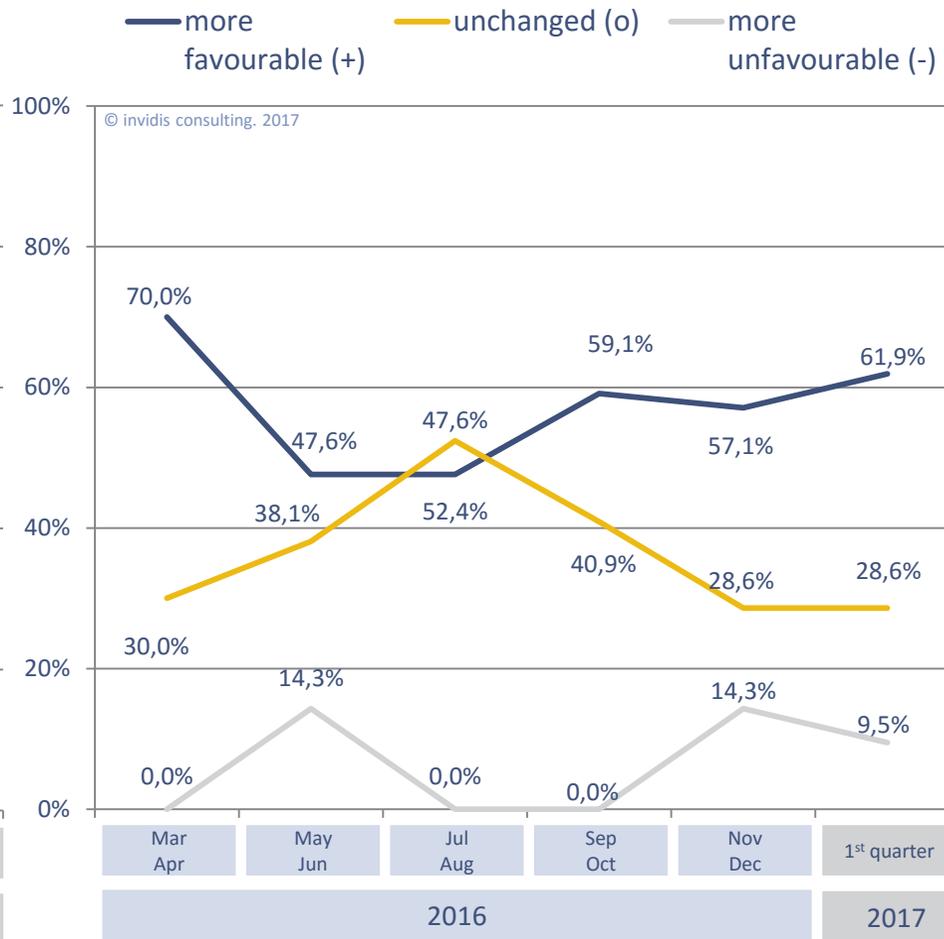


Fig. 3: DBCI France 1st Quarter 2017 „Expectations“ rolling 12 months, n=21

France | Hirings 2016 | Digital Signage creates many new jobs

- 71,4% of all companies in the Digital Signage market in the France have hired new staff in 2016. In total between 100-150 new jobs were created.
- The digital transformation in private and business life is responsible for an unbroken positive trend in the IT industry. Overall this has developed into a definite shortage of qualified personnel. Companies are more and more concerned, how they can match recruiting with their growth strategy.
- As a whole there is a high demand for digital experts on all management levels. Particularly qualified project managers and key account positions are in demand. But also technicians, programmers and administrators can be difficult to hire in highly industrialised regions where the competition for talent is strong.
- The increasing expansion in vertical markets by Digital Signage companies leads to a demand for more professionals from different industry branches.

Company growth in new jobs created 2016

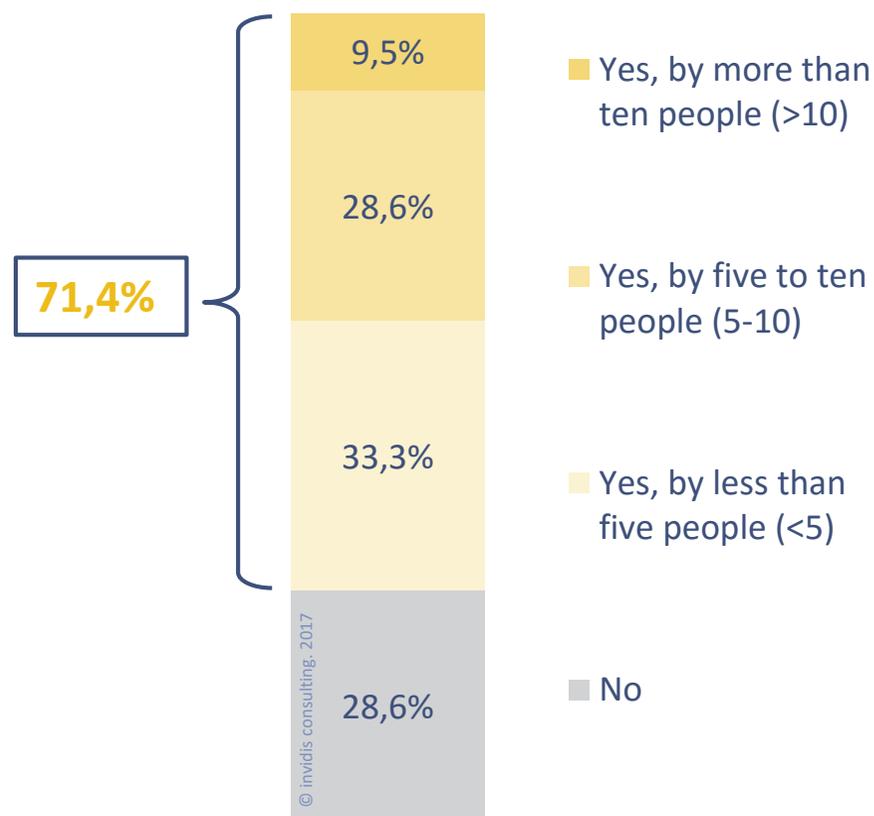


Fig. 4: DBCI France 1st Quarter 2017 "Hirings 2016", n=21

Roadmap 2017 & Contact

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

← 2nd quarter | 2017

← 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 14-15 of 2017. The next planned publication date will be in May 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