

# Barometer #2 of French innovative start-ups and SMEs' activity

Members of Cap Digital — MAY 2020

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Study carried out on a sample of 59 start-ups and SMEs members of Cap Digital from 18 to 19 May 2020

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**Date**  
18.06.2020

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**Author**  
Cap Digital

# Why this barometer?

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In response to the crisis, Cap Digital, the first ecosystem of digital innovators in Europe, stands alongside its members to meet their needs. At the end of April 2020, innovative digital start-ups and SMEs were consulted by our teams to share a precise state of their activity.

**This consultation led to the publication of a first barometer (in French only)**

-> <https://www.capdigital.com/crise-covid-19-le-barometre-cap-digital-de-lactivite-des-start-up-et-pme/>

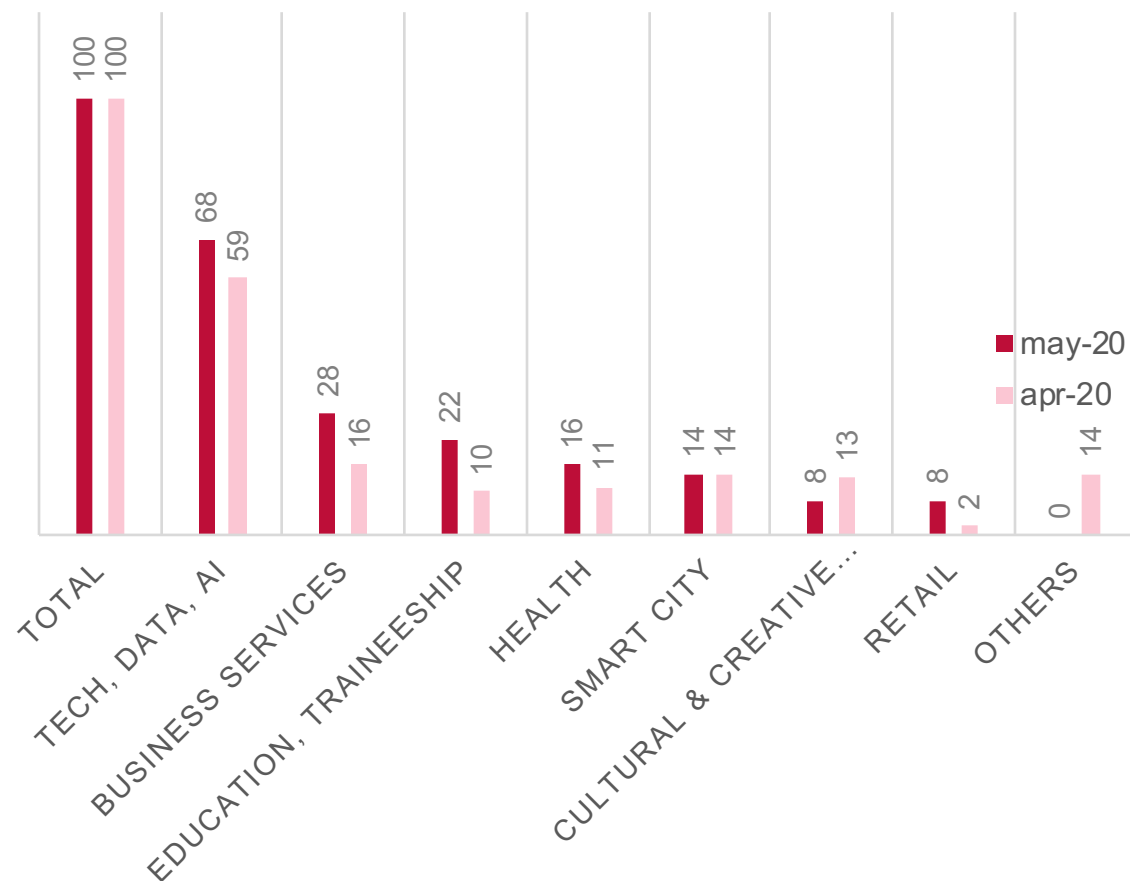
At the end of May 2020, a second consultation wave was carried out in order to measure the evolution of the situation.

**This evolution is reproduced in this second barometer.**

All these aggregated and consolidated data are shared with the main public contracting authorities in order to help them orienting their support systems.

## Respondents' profiles

Profiles of the 59 start ups and SMEs that responded to the survey

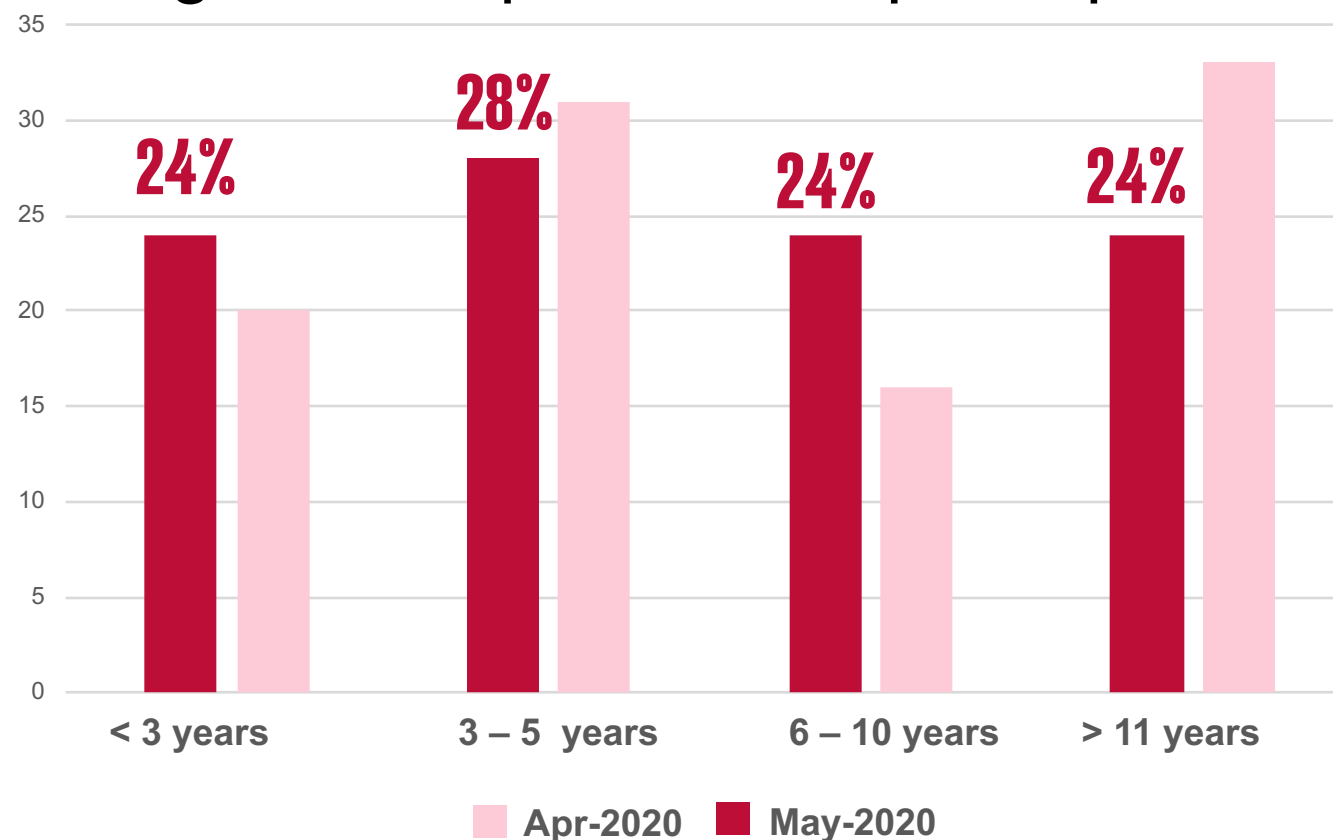


# 68%

**A majority of start-ups of the  
Techno community (Data and AI)  
VS other communities**

## Respondents' profiles

Focus on the age of companies that participated in the survey





# 1 Turnover & cash flow

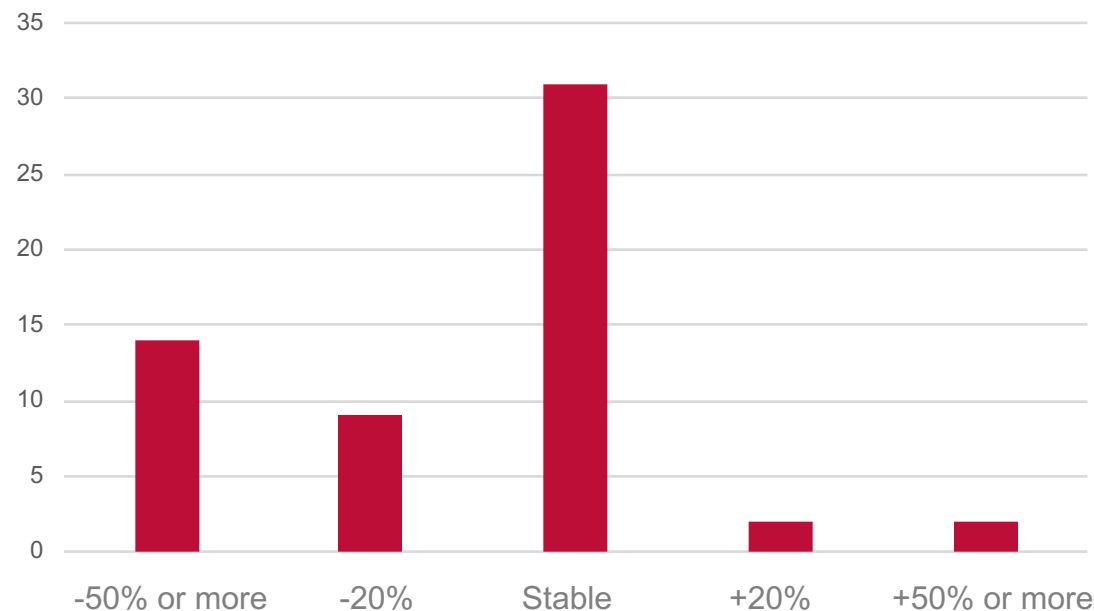
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Focus on the impact of the crisis on the activity of innovative start-ups and SMEs

## INSIGHT turnover #1

For more than a half of the companies surveyed, the turnover was stable in April 2020

How much do you estimate your turnover for March 2020 vs April 2020?



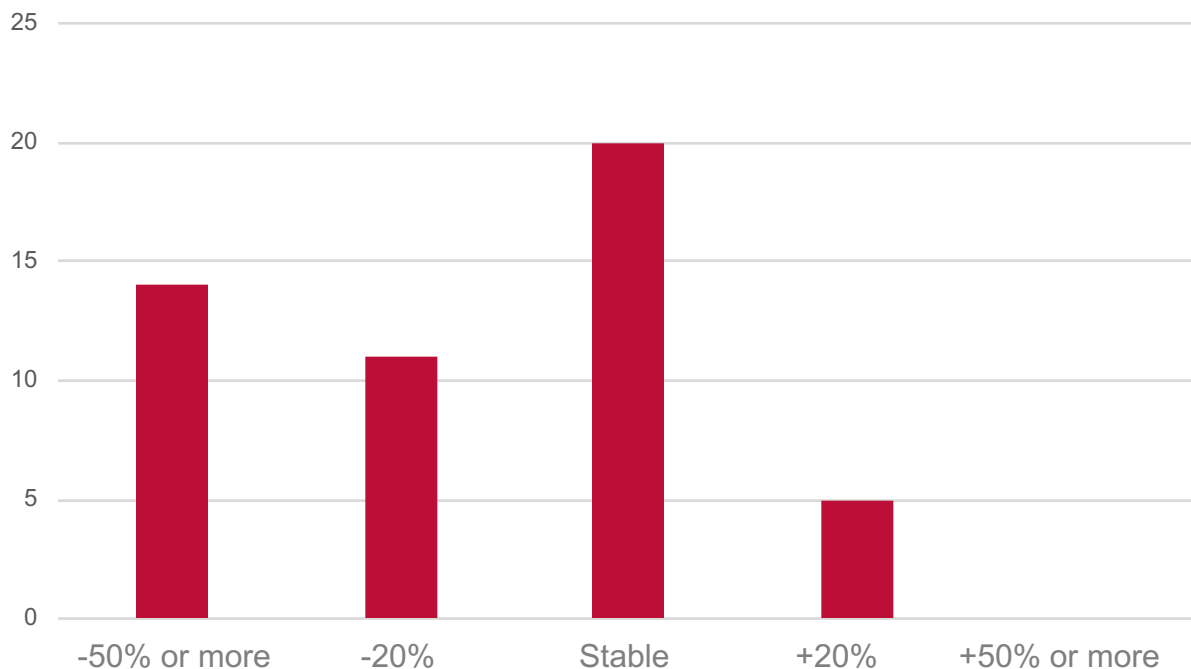
**54%**

of the companies surveyed had a stable turnover between March and April 2020

## INSIGHT turnover #2

The trend remains similar for the anticipated turnover of May 2020

How much do you estimate your turnover of May 2020?



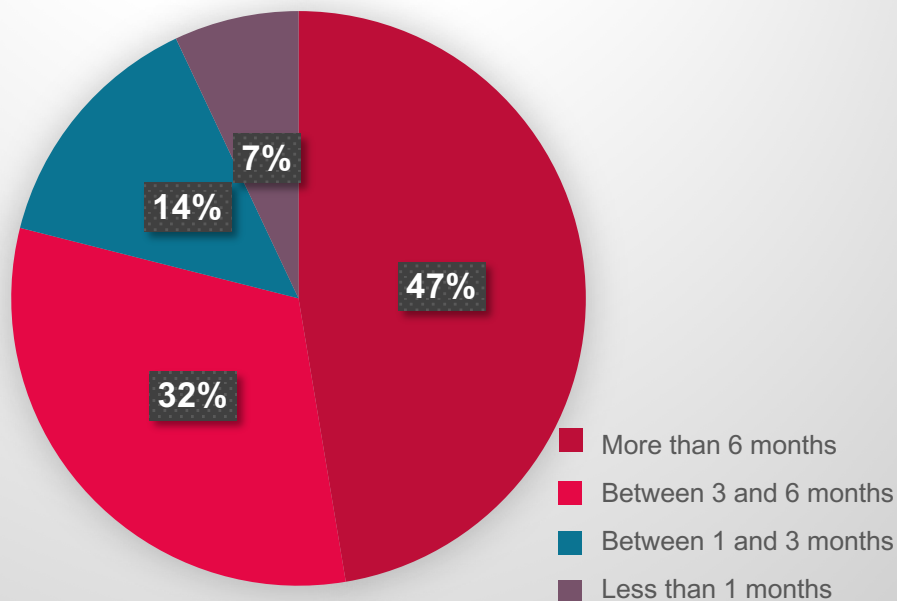
**50%**

**of companies surveyed expect stable or increasing turnover in May 2020**

## INSIGHT Cash flow

The companies surveyed regain cash flow capacity

Your current treasury capacities allow you to support your activity during?



**47%**

of the interrogated companies indicate that their current cash flow capacities will allow them to hold for more than 6 months.

**VS 36%**

as for the barometer of end of April 2020



# 2 Use of support programs for companies

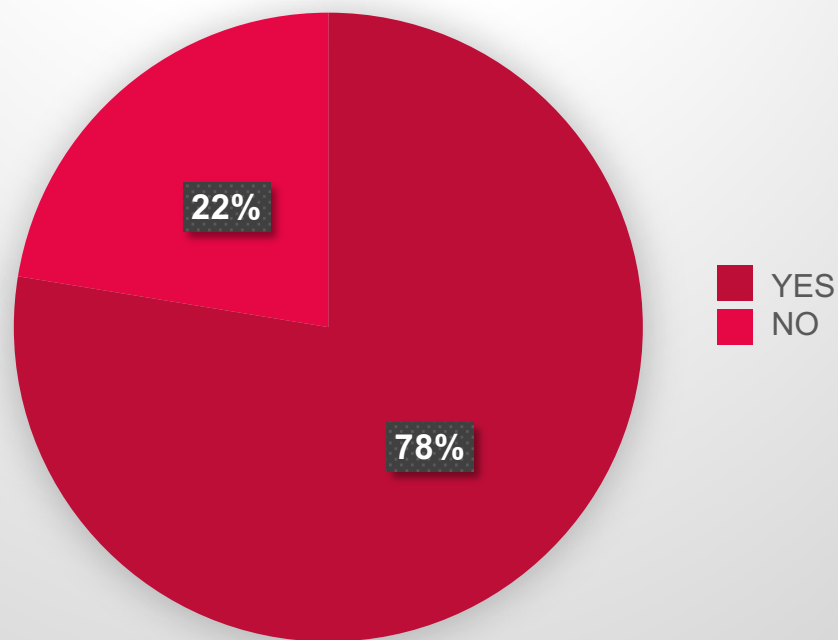
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How did start-ups and SMEs get hold of the aid put in place by the Regions and the State?

## INSIGHT Support programs #1

### Public aid instruments widely mobilized

Did you use one or many public aid instruments?



**78%**

**of start-ups and SMEs have requested one or many support mechanisms at national or regional level since the beginning of the crisis.**

# 3 Staff evolution

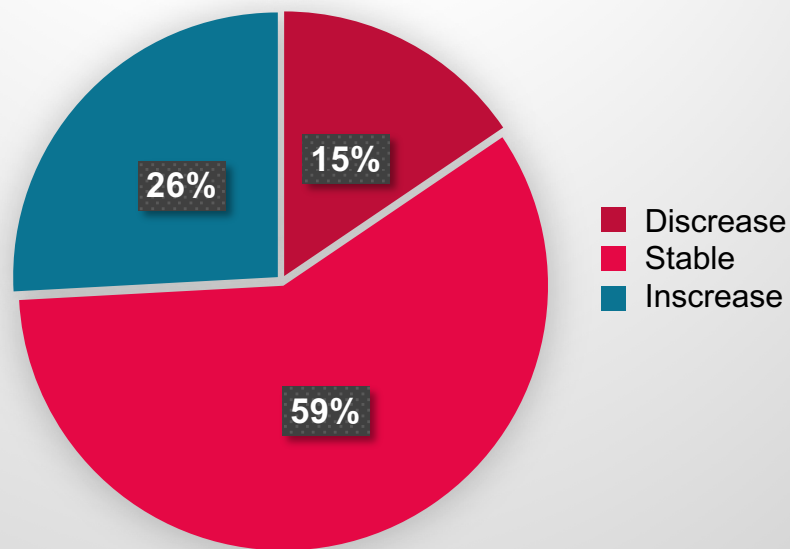
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What impact of the crisis on the payroll evolution?

## INSIGHT Workforce

Despite the difficulties, the vast majority of start-ups & SMEs do not plan to reduce their payroll

In the next three months, how do you envisage the evolution of your staff?



**26%**

of the interrogated companies even declare to plan to hire people over the next three months.



# 4 The need to look to the future

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In the context of the crisis, entrepreneurs are reviewing their priorities and maintain the same level of confidence as in April 2020.

## INSIGHT Priorities

Respondents' priorities for action in the coming month



**The 2 priorities**  
on which entrepreneurs are focusing

**#1 - Commercial prospecting (78%)**

**#2 – Adaptation of the service offering (64%)**

## INSIGHT Confidence

Significant improvement of the confidence rating in May vs April 2020

	MAY	APRIL
<b>Very confident for the future</b>	<b>20%</b>	<b>11%</b>
<b>Confident for the future</b>	<b>38%</b>	<b>33%</b>
<b>Moderately confident for the future</b>	<b>30%</b>	<b>25%</b>
<b>Little confident for the future</b>	<b>12%</b>	<b>31%</b>

Indicator calculated on a declared average score:

9 to 10/10 : very confident --- 7 to 8/10 : conf --- 5 to 6/10 : moderately confident --- 9 to 4/10 : little confident


# # In opening

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Some concrete proposals made by the companies surveyed




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The innovation and technology sector has been severely impacted by the crisis since the majority of companies stopped investing to preserve their cash flow.

It is necessary to reinvigorate and relaunch innovation. For example, tax credits could be granted to companies that collaborate with start-ups or in new technologies.



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Directing a large share of public procurement towards companies offering innovative solutions.

This would accelerate the use of our high-performance solutions for the benefit of the community.




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The measures proposed by public authorities must, in our view, prioritize and guide towards activities creating a significant social and environmental added-value (impact).

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DU SOUTIEN DU FONDS SOCIAL  
EUROPÉEN ET DU FONDS EUROPÉEN  
DE DÉVELOPPEMENT RÉGIONAL

