Scandinavia

July | August 2015

DBCI

OVAB Digital Signage & DooH Business Climate Index

The pulse of the Digital Signage and DooH industry

invidis CONSULTING

invidis research
2015 SK 400

DBCI Scandinavia - Introduction

- The OVAB Europe **D**igital Signage **B**usiness **C**limate **I**ndex (DBCI) is the leading European indicator of the economic development of the Digital Signage and Digital-out-of-Home industry
- It is compiled every two months by invidis consulting in cooperation with OVAB Europe
- Questions:
  - Current business situation: "good", "satisfactory" or "poor"
  - Expectations for the next six months: "more favourable", "unchanged" or "more unfavourable"
- **Scandinavia**– second poll July/August 2015:
  - Scandinavia is the 4th largest market in Europe for Digital Signage (in units of public displays), with a +20% YoY dynamic development across the region
  - DBCI Scandinavia: **67,45** base points
  - **69,6%** of the polled companies have a **positive outlook** for their business within the next six months
  - Only **4,3%** of the polled companies rate their current business situation as **negative**

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Index | Digital Signage industry continues with positive trend

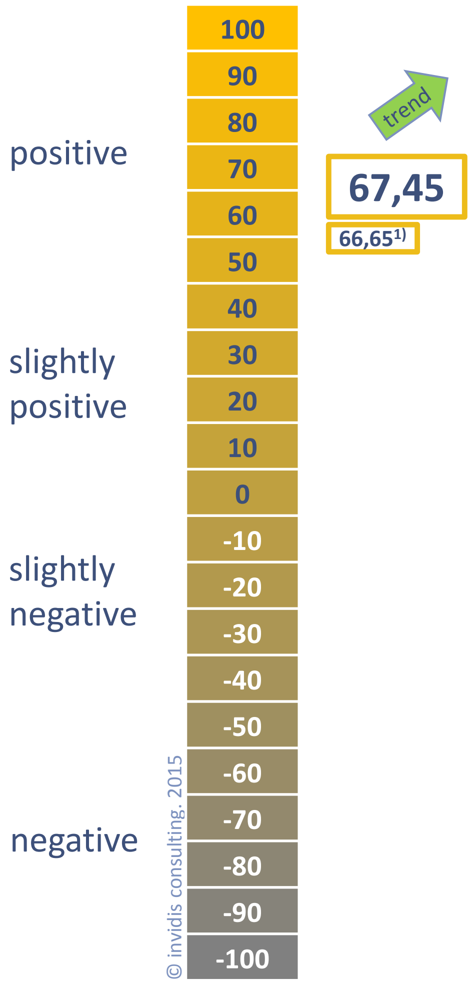


Fig. 1: DBCI SK July | August 2015 n=23

1) DBCI May | June 2015

- The Digital Signage Business Climate Index Scandinavia has been surveyed for the second time in 2015. The index grew marginally from 66,65 base points by 0,80 to 67,45 base points.
- The positive outlook of the DBCI reflects the good business sentiment of the Digital Signage industry in Scandinavia
- The evaluation of the current business situation has declined slightly, with almost 70% of the market participants rating their situation as “good”
- The outlook for the next six months has increased by almost 10%, with again 70% of the polled companies expecting “more favourable” business conditions for their products and services

Further Research

- In 2014 only 10% or even less of all Digital Signage solutions or DooH campaigns were realized with the integration of mobile devices
- For the next two years the market participants don’t see the current situation changing much. The market share of Digital Signage solutions or DooH campaigns using mobile integration will remain at around 10%.

Survey facts
- Participants: n=23
- Region: Denmark, Sweden, Norway, Finland & Iceland
- Time frame: 2015 calendar weeks 26-27

Status Quo | Stable positive current business situation

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

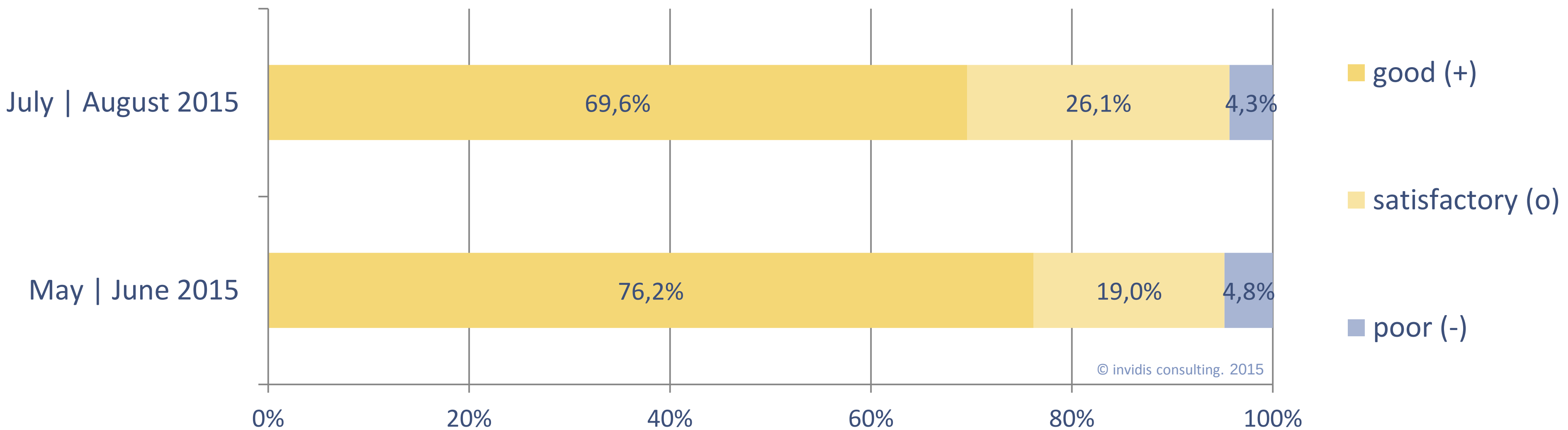


Fig. 2: DBCI SK July | August 2015 "business situation", n=23

Expectations | Increasingly good outlook for the next six months

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

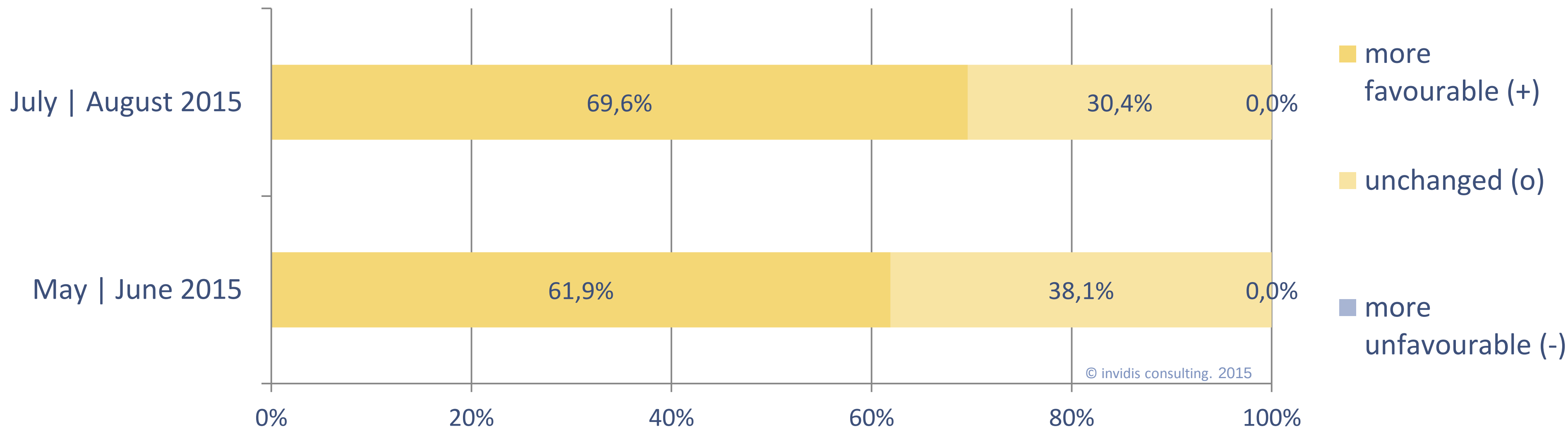


Fig. 3: DBCI SK July | August 2015 "business expectations", n=23

Further research | Mobile integration is still in it‘s infancy

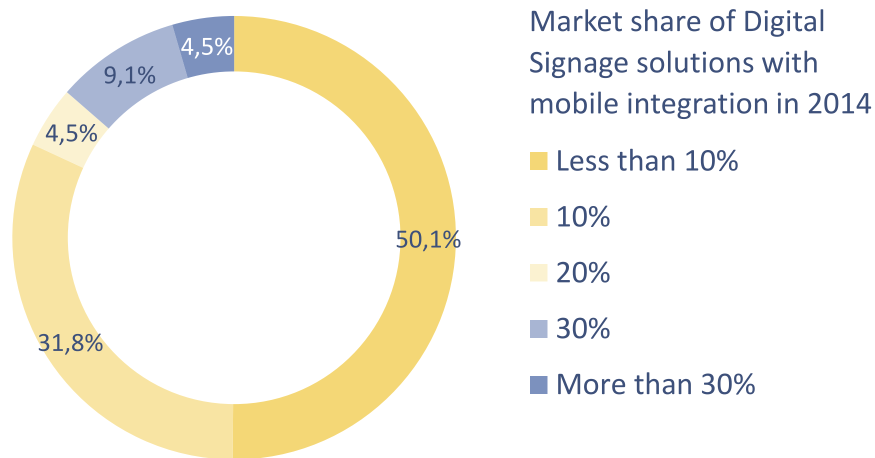
***Question**: How high was the percentage of Digital Signage installations or DooH campaigns with mobile integration you have realized in the last 12 months?*

- Mobile integration is one of the buzzwords connected to the omni-channel retail concept within the digital transformation
- However, in 2014 still only 10% or even less of all Digital Signage solutions or DooH campaigns were actively banking on integrating mobile devices
- Most installations or campaigns still rely on content which doesn't access the many interactive possibilities of the digital world, but rather is a digitized version of an analogue media format (i.e. poster)

***Question:** How high do you expect the percentage of Digital Signage installations or DooH campaigns with mobile integration will be in 24 months?.*

- For the next two years the market participants don’t see the current situation changing much. Yet the percentage of companies expecting to realize a 20% share of projects with mobile integration will rise by 10%.

Mobile Integration 2014



Mobile Integration 2016/17

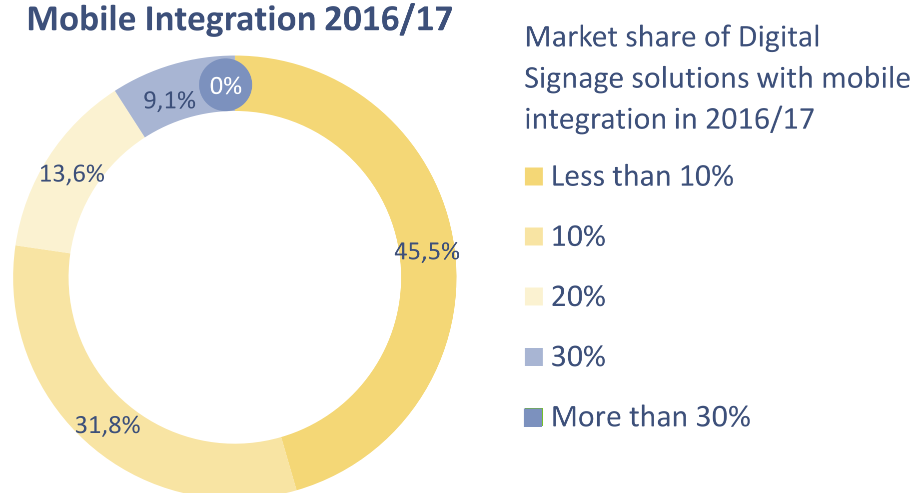


Fig. 4: DBCI July | August 2015 “mobile integration”, n=22

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DBCI | Roadmap 2015 & Contact

2015	
January	
February	
March	
April	
May	
June	
July	
August	
September	Sep./Oct. | 2015/09/07
October	
November	Nov./Dec. | 2015/10/09
December	

- The next survey will take place in calendar week 34-35 of 2015
- The next planned publication date will be the 9th 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.

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