

Germany

Austria

Switzerland

September | October 2015

**DBCI**

The pulse of the Digital Signage  
and DooH industry

**OVAB** Digital Signage & DooH  
Business Climate Index

OVAB cooperation partner Switzerland:





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# Index | Digital Signage business sentiment starting to embrace end of year rally



Fig. 1: DBCI September | October 2015 „Index DE-AT-CH“ rolling 12 months, n=94

- Since the last survey in July 2015 the Digital Signage Business Climate Index has increased by 9,65 base points from 51,00 base points to 60,65 base points.
- The current business situation has brighten up and increased by 5% reaching a 12 month high. The cautious situation at the start of the summer has changed, as new impulses by the robust reaction of the German economy to global economic challenges
- The optimism towards the near future saw an even stronger growth by 16%. As 59% of all polled companies expect a *more favourable* situation for their business within the next six months.

### Further Research

- Almost 90% of the polled companies in Germany, Austria and Switzerland expect to have a growth in revenues in 2015 compared to 2014
- Still 8,5% 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=94; Region: DE/AT/CH; Survey Period: 2015 calendar weeks 35-36



# DE-AT-CH | Current business situation up, outlook more optimistic

Business Situation | DE-AT-CH | September/October 2015

Expectations | DE-AT-CH | September/October 2015

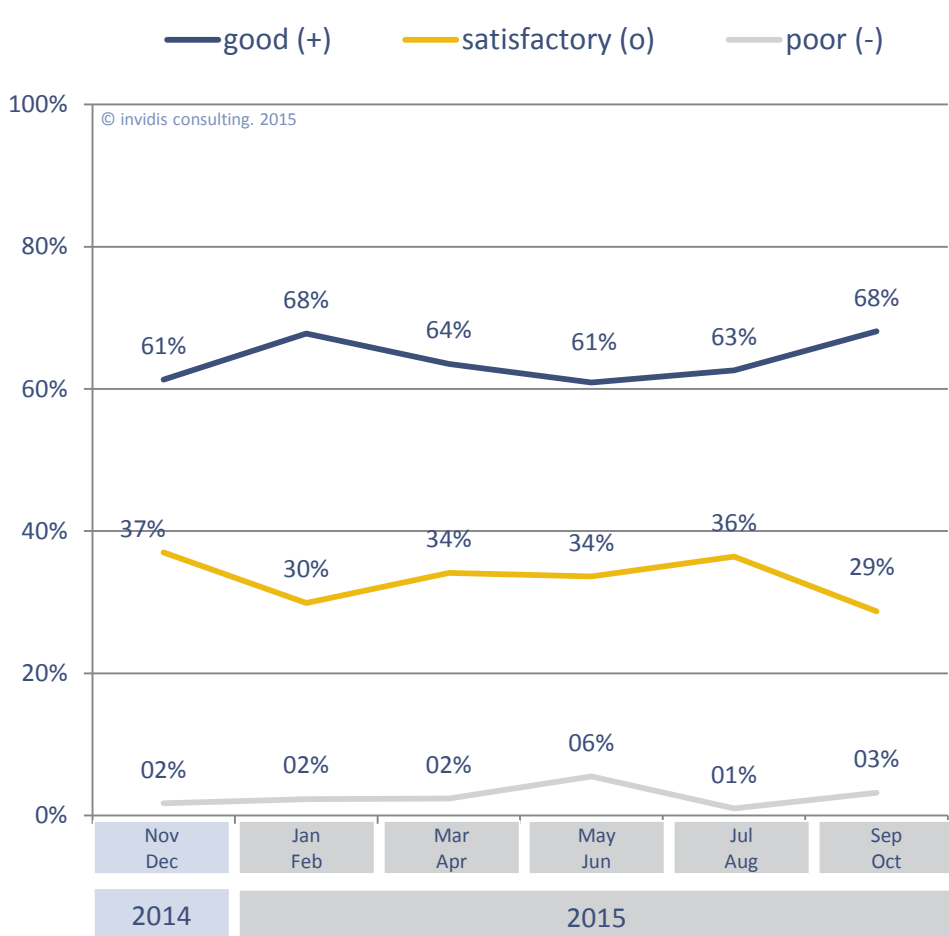


Fig. 2: DBCI September | October 2015 „Business Situation DE-AT-CH“ rolling 12 months, n=94

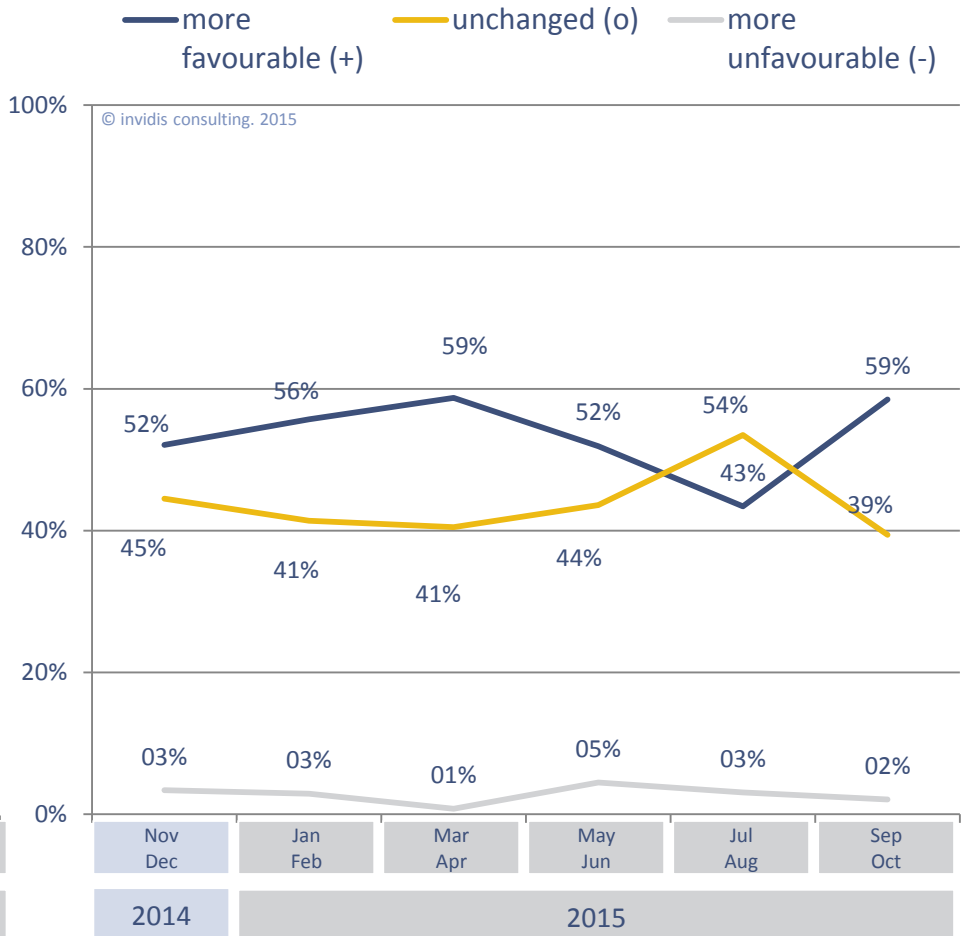


Fig. 3: DBCI September | October 2015 „Expectations DE-AT-CH“ rolling 12 months, n=94

DE-AT-CH | Positive answers increase for business situation and outlook

Business Sentiment | DE-AT-CH | September/October 2015

Expectations | DE-AT-CH | September/October 2015

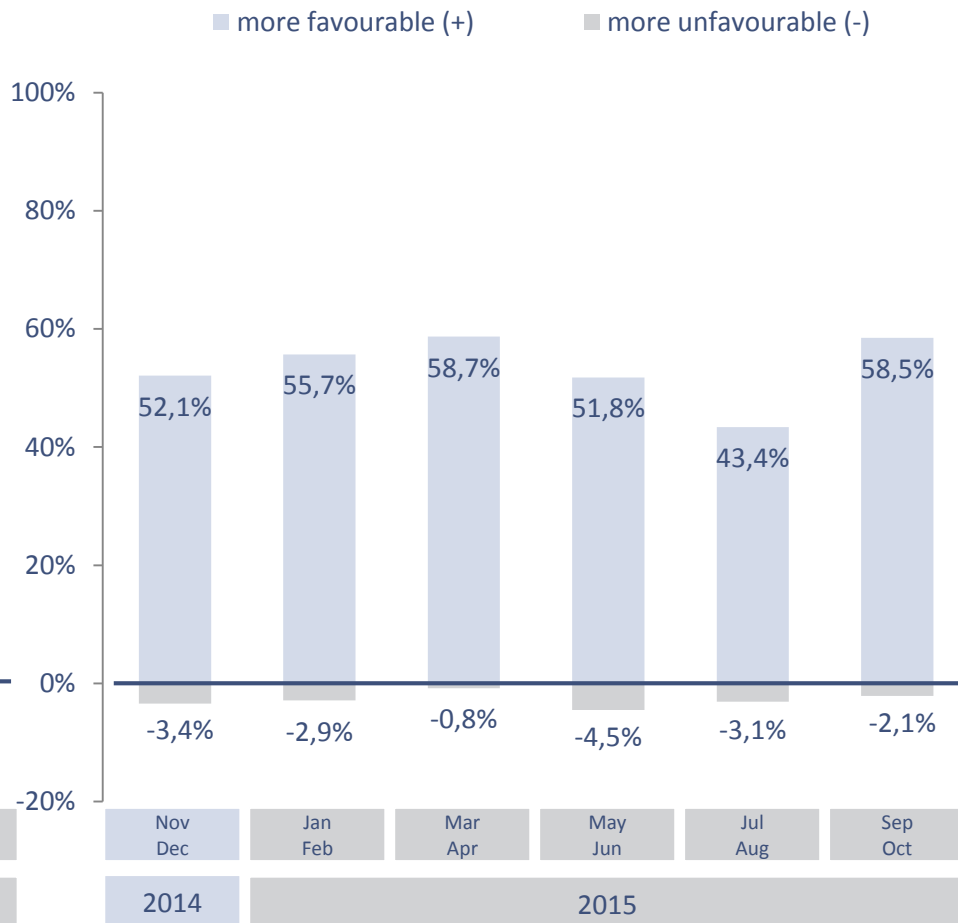
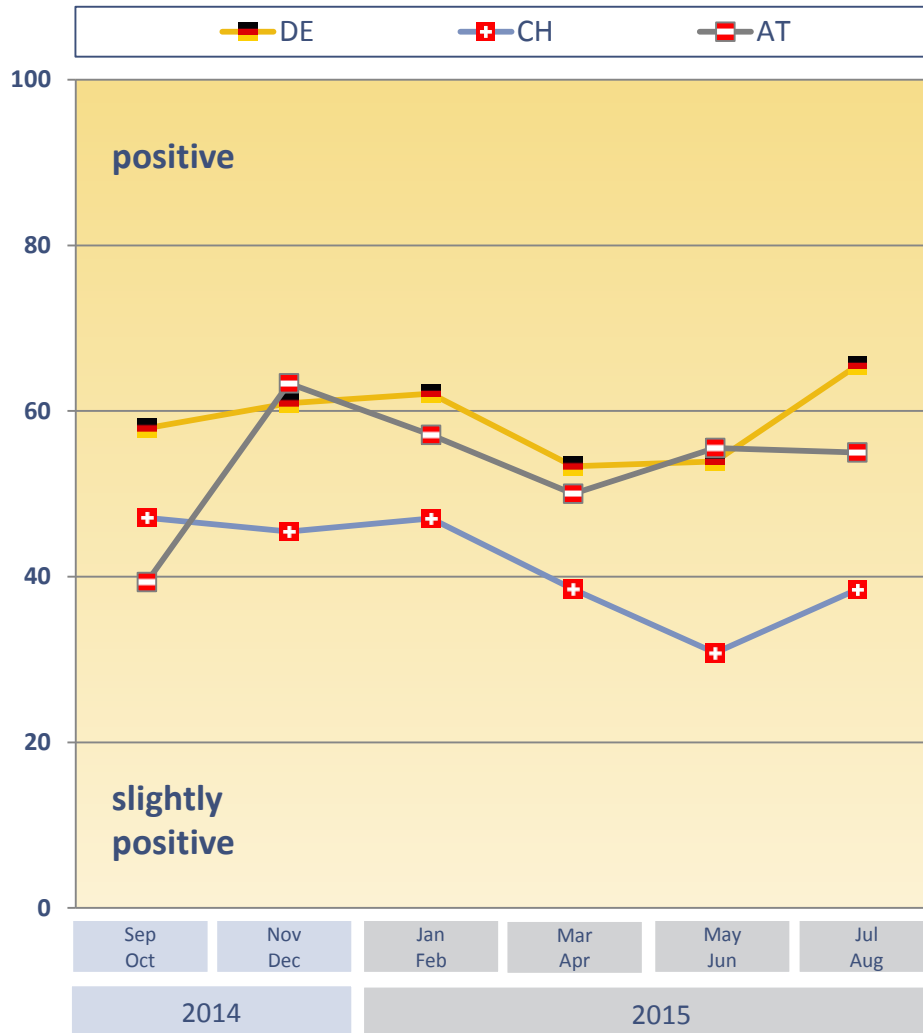


Fig. 4: DBCI September | October 2015 „Business Sentiment DE-AT-CH“ rolling 12 months, n=94

Fig. 5: DBCI September | October 2015 „Expectations DE-AT-CH“ rolling 12 months, n=94

Countries | Business sentiment with positive trend in Germany, Austria and Switzerland



- Since the last survey the business climate in the German Digital Signage market has increased strongly. The confidence in the current business situation and the outlook for the next six months recorded a clear growth. After a rather cautious start in the year, the summer has shown the resilience of the German general economy to global challenges like the Greek bailout crisis or the volatile Chinese stock markets. With a consistent and recurring cash-cow business from the small and medium business sector and satisfactory amount of large scale tenders, the general good sentiment in the German market remains high.
- In Switzerland the business climate in the Digital Signage market has also increased. While the strong Swiss Franc is still hindering the economic growth, a robust German economy has helped the national currency to be slightly devalued against the Euro. Hence absorbing some of the pressure on the economy.
- Only in Austria the business sentiment in the Digital Signage market has not seen a high dynamic in the last survey period. However, the unexpected positive GDP development in the second quarter has given an optimistic turn to the economical outlook for the near future.

Fig. 6: DBCI September | October 2015 „Index DE-AT-CH“ rolling 12 months, DE 71, CH 13, AT 9

# Germany | Business situation & outlook increasingly optimistic

Business Situation | Germany | September/October 2015

Expectations | Germany | September/October 2015

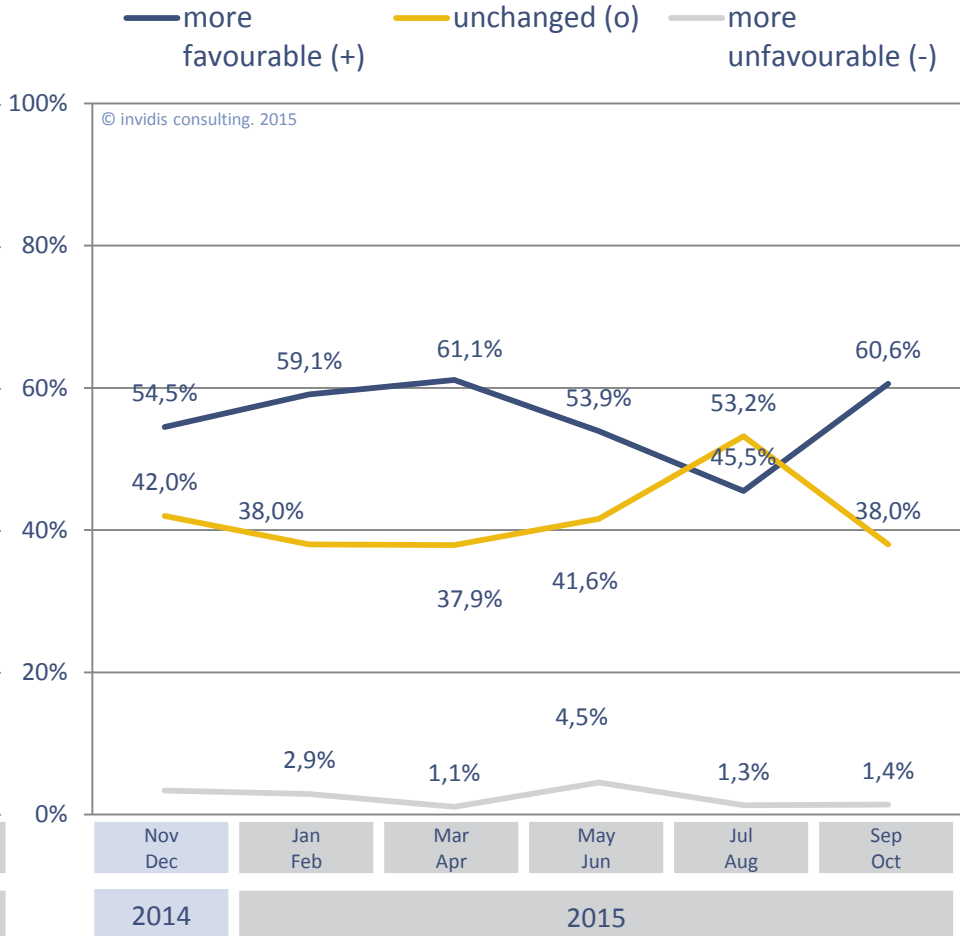
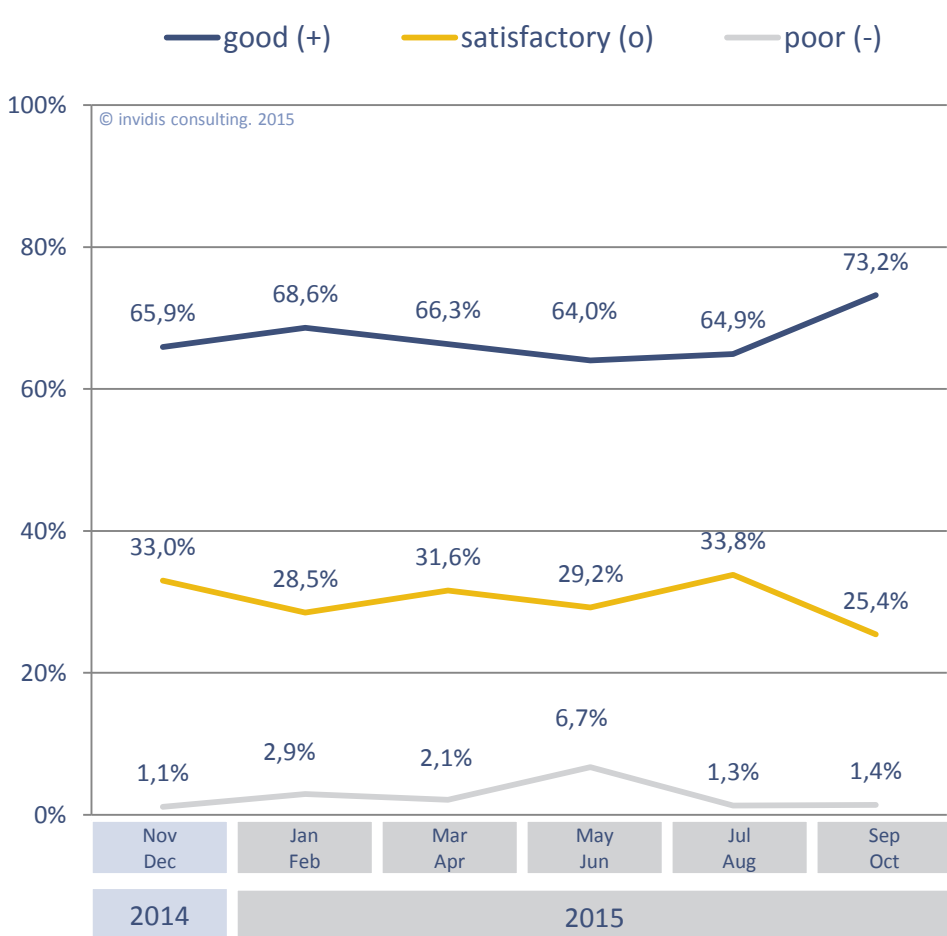


Fig. 7: DBCI September | October 2015 „Business Situation Germany“ rolling 12 months, n=71

Fig. 8: DBCI September | October 2015 „Expectations Germany“ rolling 12 months, n=71



# Austria | More conservative business situation, but positive outlook

Business Situation | Germany | September/October 2015

Expectations | Germany | September/October 2015

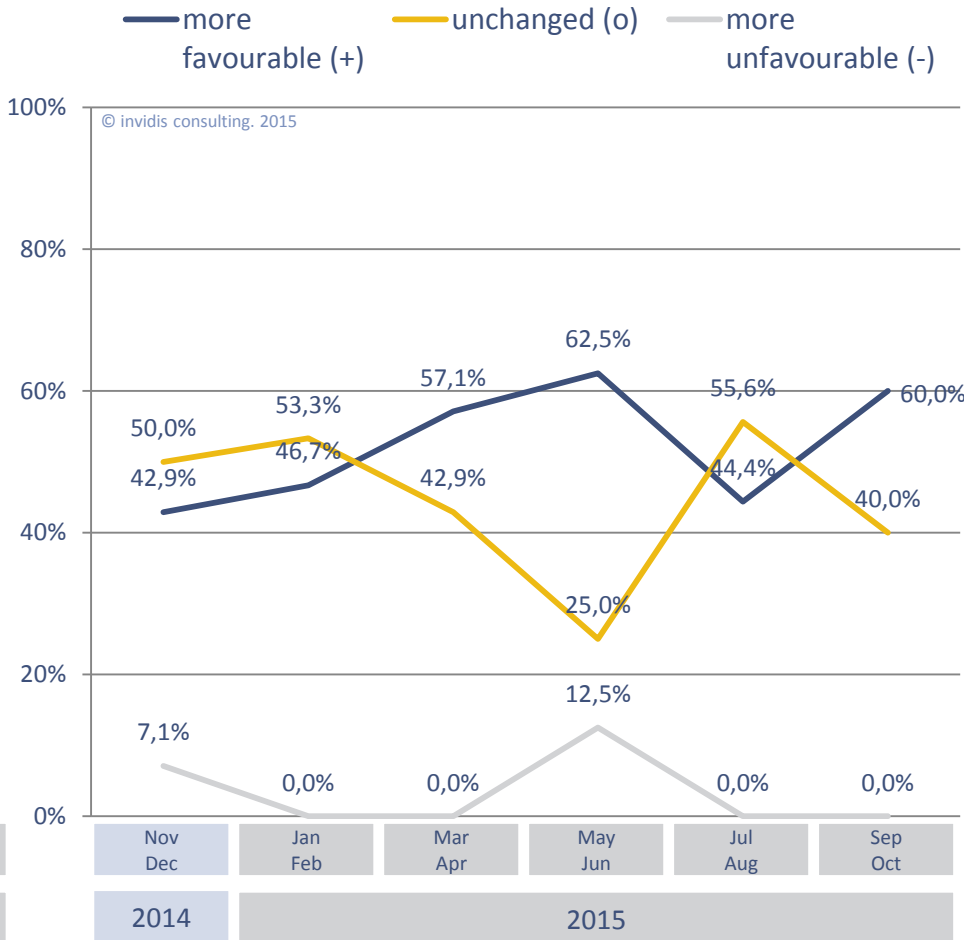
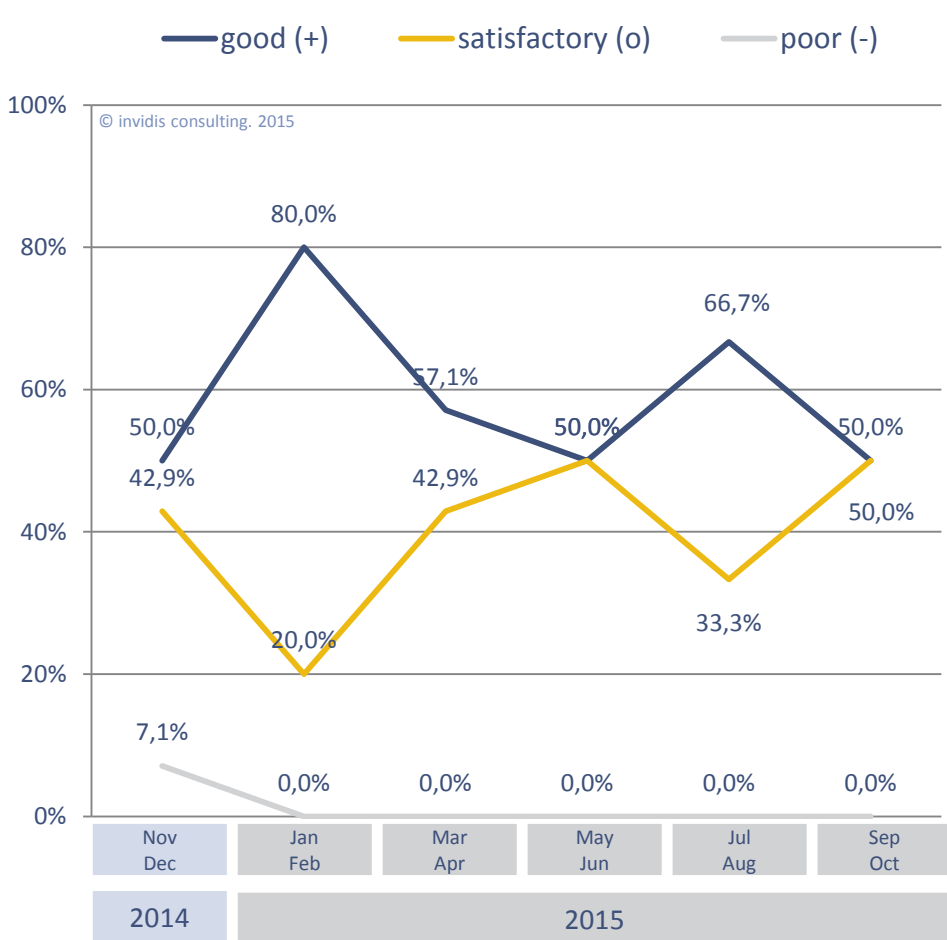


Fig. 9: DBCI September | October 2015 „Business Situation Austria" rolling 12 months, n=9

Fig. 10: DBCI September | October 2015 „Expectations Austria" rolling 12 months, n=9



# Switzerland | Business situation & outlook with markedly positive trend

Business Situation | Switzerland | September/October 2015

Expectations | Switzerland | September/October 2015

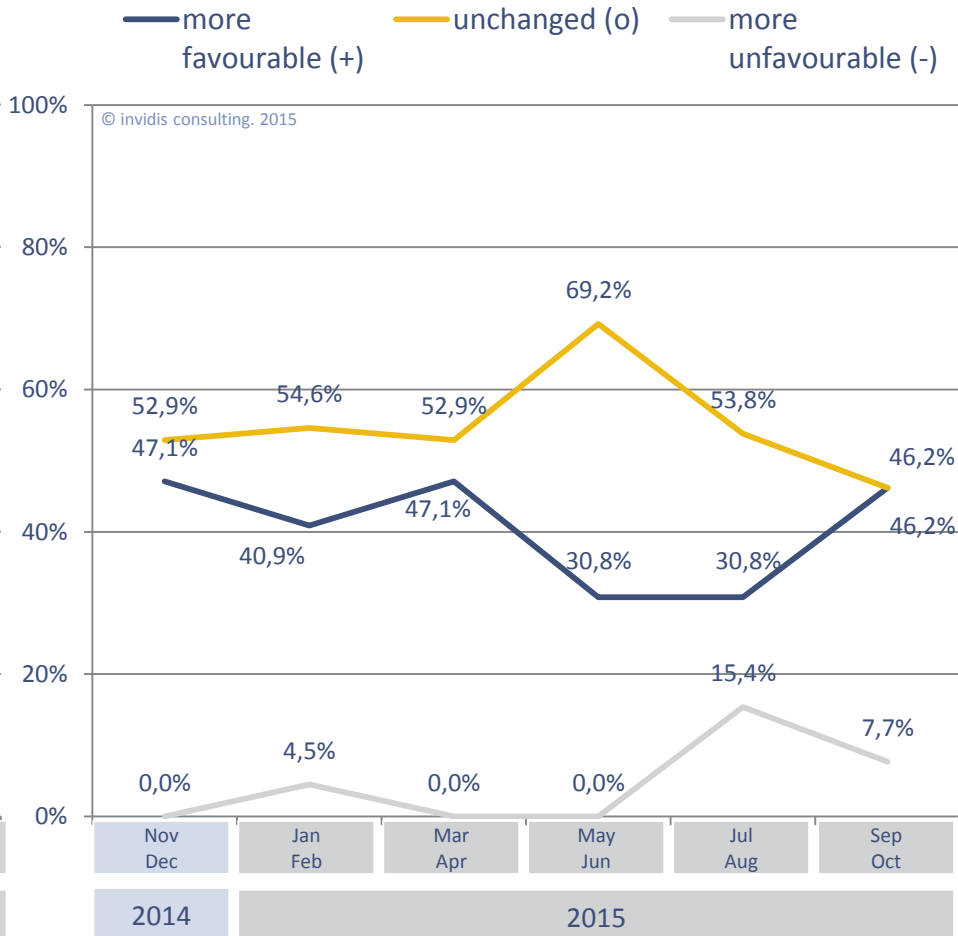
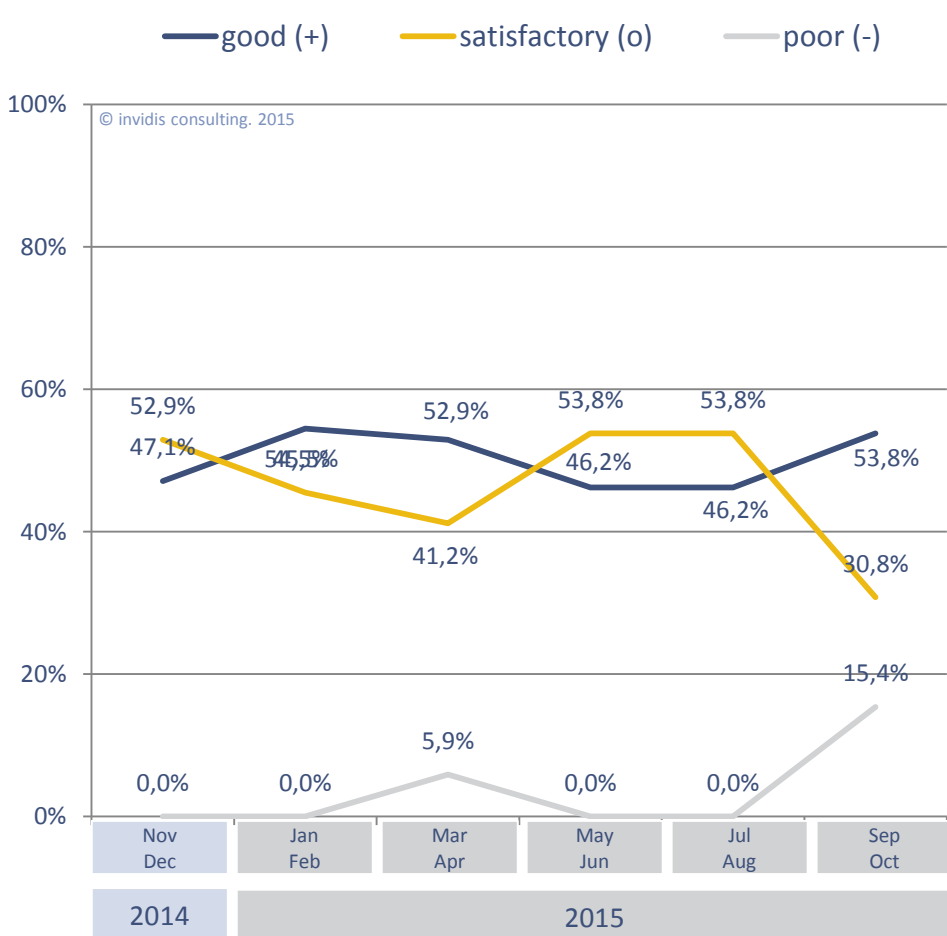
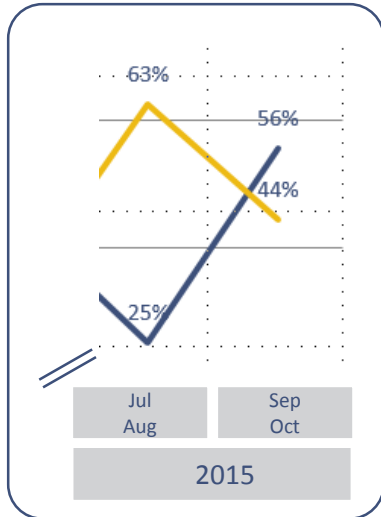


Fig. 11: DBCI September | October 2015 „Business Situation Switzerland“ rolling 12 months, n=13

Fig. 12: DBCI September | October 2015 „Expectations Switzerland“ rolling 12 months, n=13



## Segments | Consolidation dominates Display industry in 2014



### Displays

more favourable (+)

no change (o)

Fig. 13: DBCI September | October 2015 "Expectations Displays", n=9

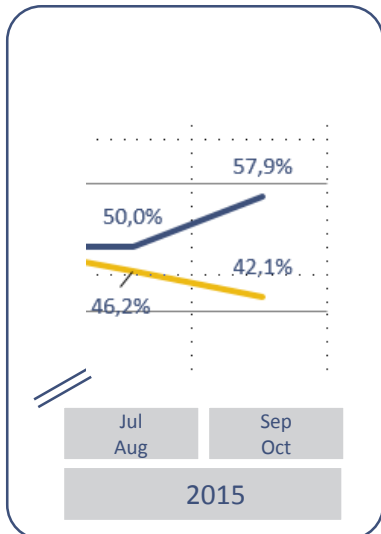
- The volatile evaluation of the business sentiment by the **display vendors** remains high. After a rather conservative business situation at the start of the summer, in September a very positive sentiment is pushing the industry. A successful first semester of 2015 with a year on year growth in units of over 20% gives the market participants reason for a strong increase in favourable expectations for the end of year business.<sup>1)</sup>

- The **System Integrators** have a consistent positive view of the market as all surveyed companies record a satisfactory or good current business situation. A healthy customer demand, particularly in the small and medium business sector, and a balanced competition has ensured that a steady level of interesting tenders are on the market.

- Like the display vendors, the **software** market registered a markedly increased current business climate. In particular the *more favourable* expectations for the six month outlook have clearly grown.

- The DooH industry experienced the traditional summer slump in OoH advertising spendings, but will see an improvement in the fourth quarter. As almost 60% of all polled companies expect a more favourable business situation within the next six months

<sup>1)</sup> GfK/invidis professional displays and Digital Signage sell through data



### DooH

more favourable (+)

no change (o)

Fig. 14: DBCI September | October 2015 "Business situation DooH", n=19



# Displays | Business situation much better than expected & very optimistic outlook

Business Situation | Displays | Jul/Aug 2015

Expectations | Displays | Jul/Aug 2015

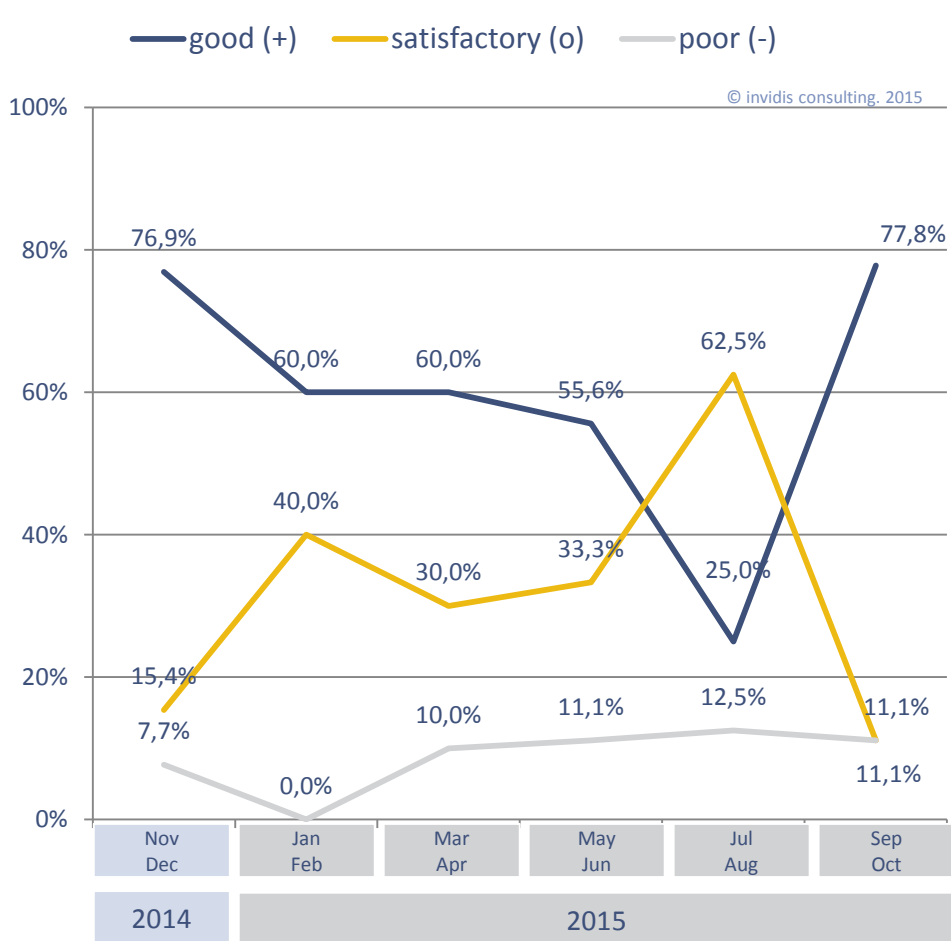


Fig. 15: DBCI Jul | Aug 2015 „Business Situation Displays“ rolling 12 months, n=9

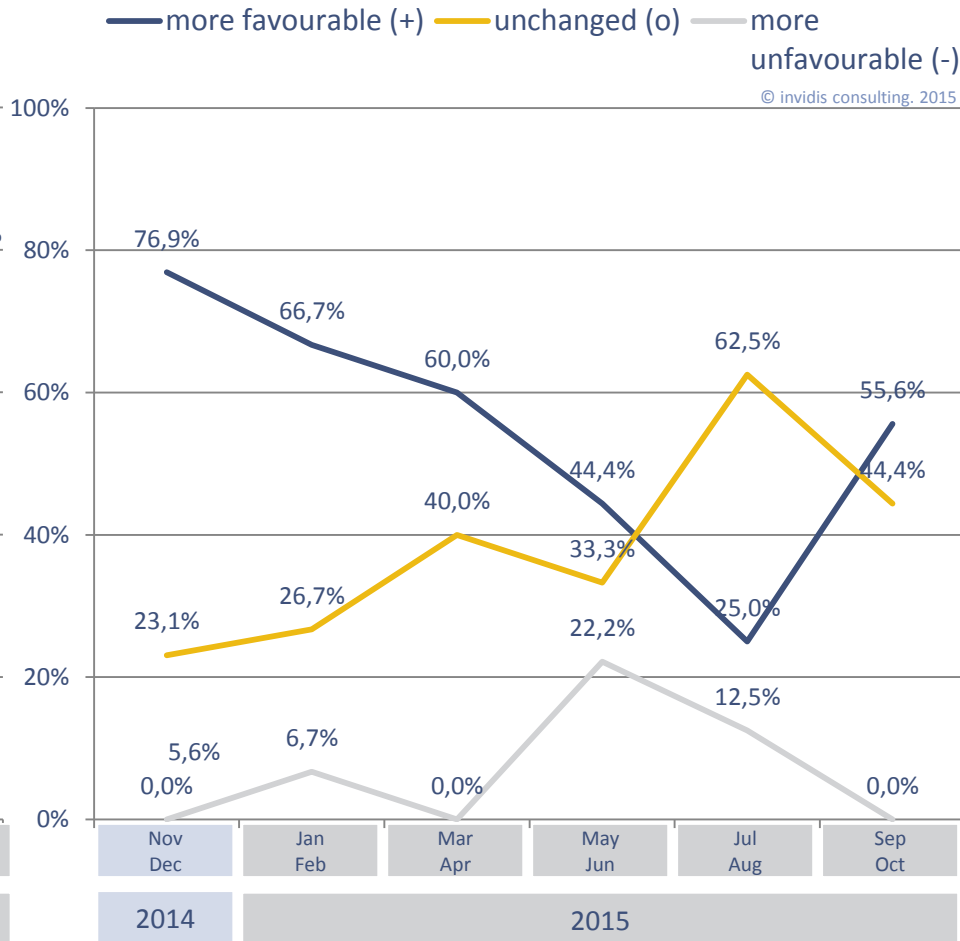


Fig. 16: DBCI Jul | Aug 2015 „Expectations Displays“ rolling 12 months, n=9



# Integrators | Increased business situation & positive six month outlook

Business Situation | Integrators | September/October 2015

Expectations | Integrator | September/October 2015

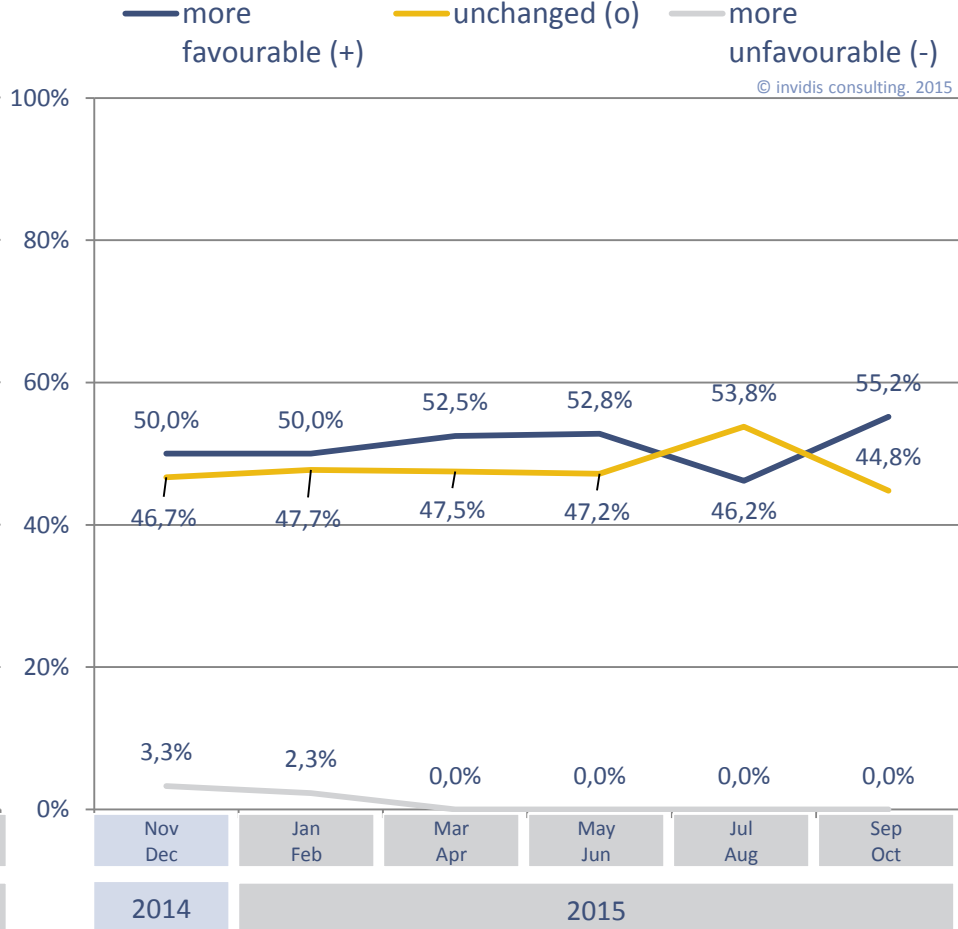
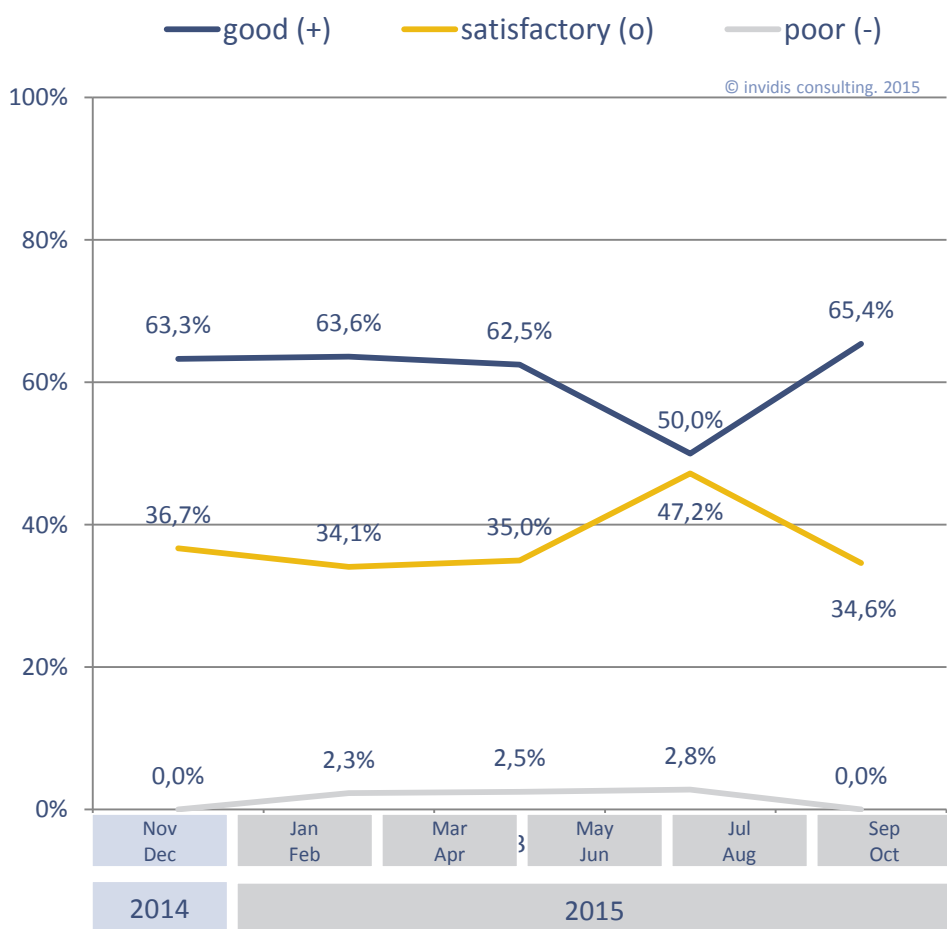


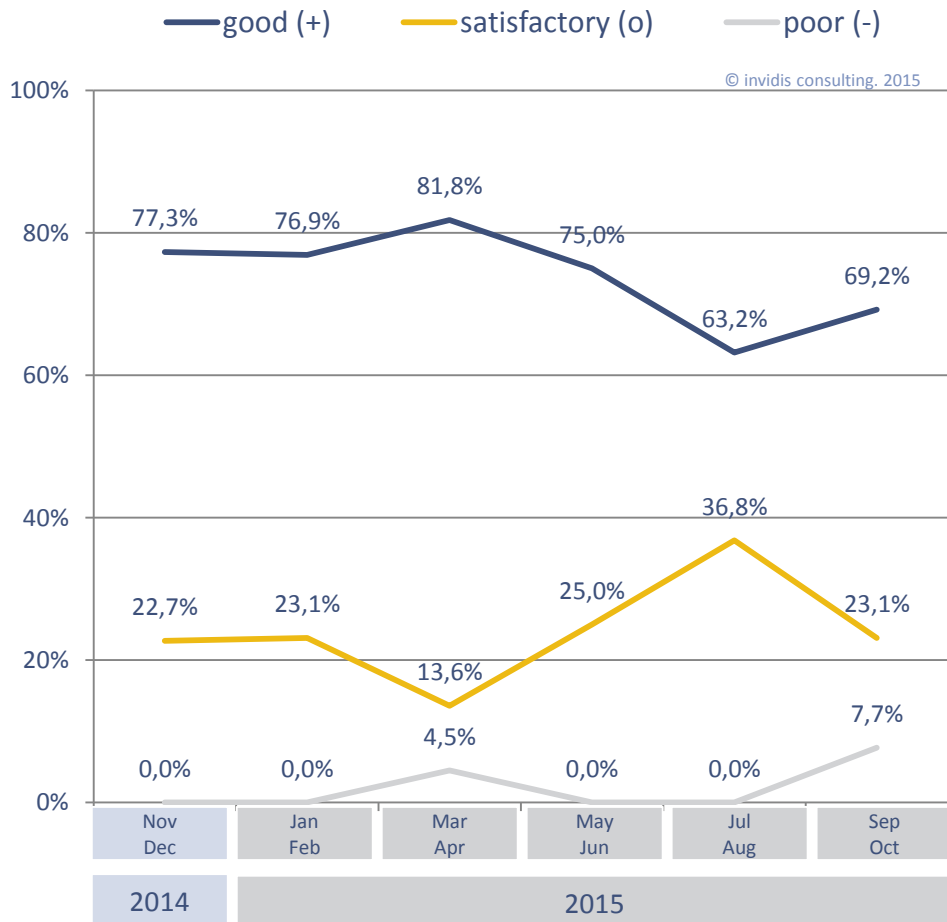
Fig. 17. DBCI September | October 2015 „Business Situation Integrators“ rolling 12 months, n=29

Fig. 18. DBCI September | October 2015 „Expectations Integrators“ rolling 12 months, n=29



# Software | Positive business situation & drastically increased outlook

Business Situation | Software | September/October 2015



Expectations | Software | September/October 2015

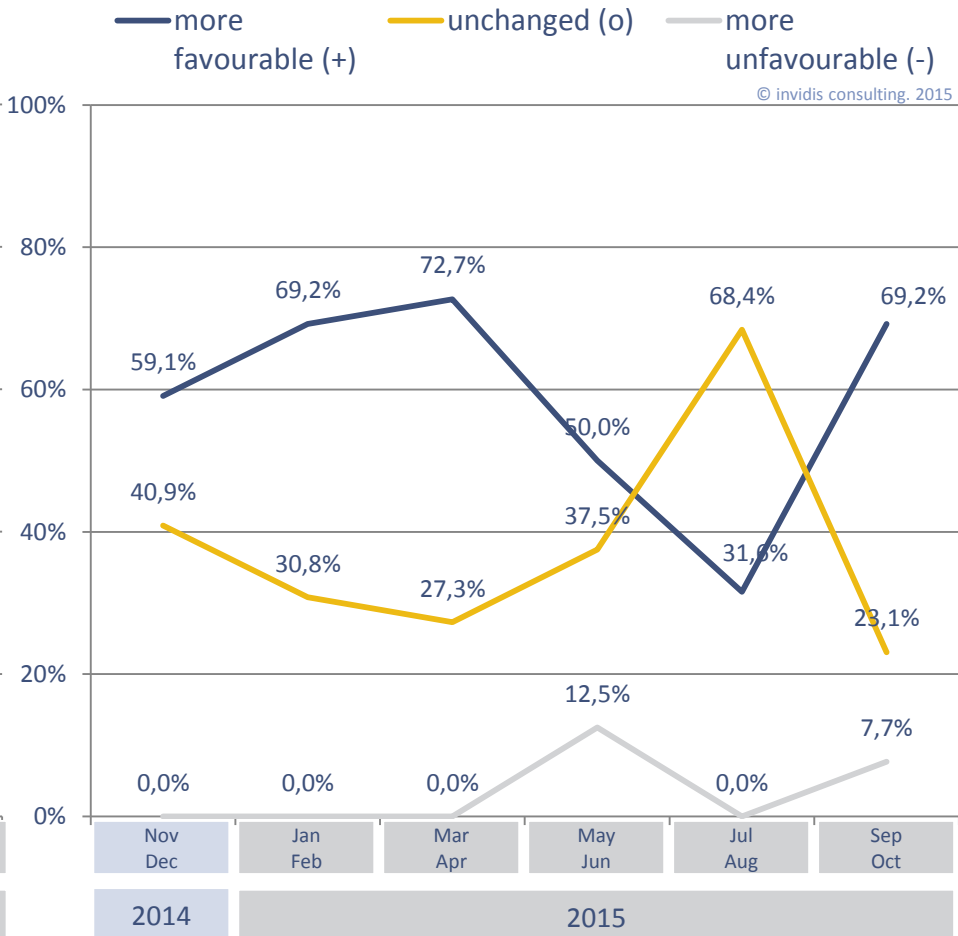


Fig. 19: DBCI September | October 2015 „Business Situation Software“ rolling 12 months, n=13

Fig. 20: DBCI September | October 2015 „Expectations Software“ rolling 12 months, n=13

DooH | Conservative business situation & optimistic six month outlook

Business Situation | DooH | September/October 2015

Expectations | DooH | September/October 2015

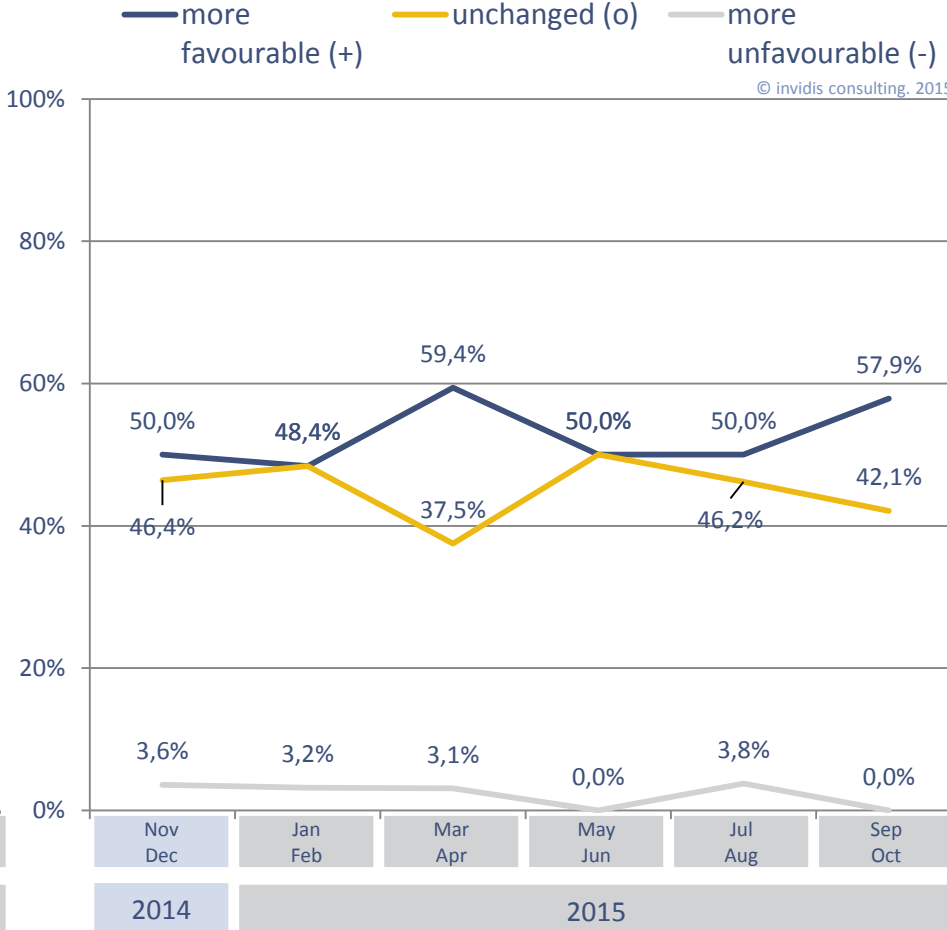
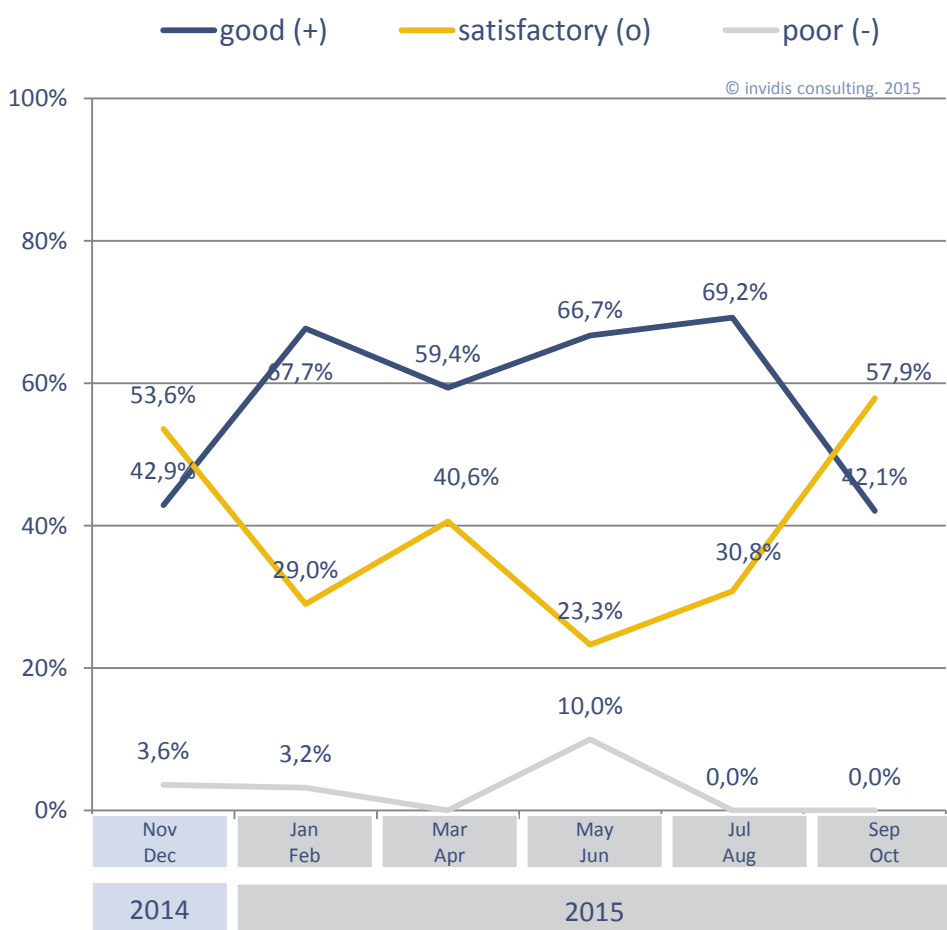


Fig. 21: DBCI September | October 2015 „Business Situation DooH“ rolling 12 months, n=19

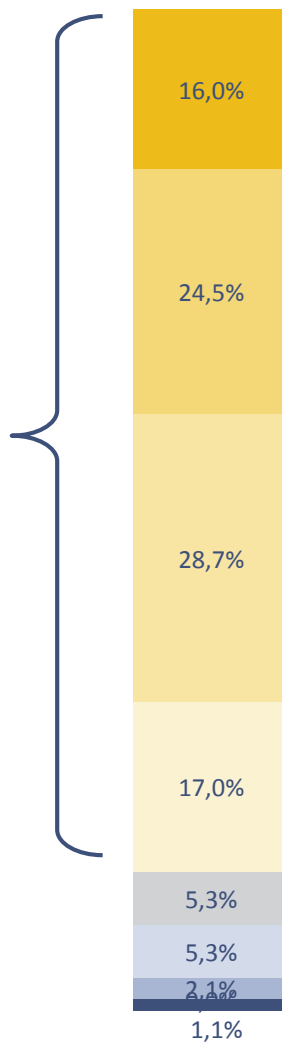
Fig. 22: DBCI September | October 2015 „Expectations DooH“ rolling 12 months, n=19

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.”*

86,2% 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 8,5% 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. :24 DBCI September/October 2015 “revenues H1 2014-2015”, n=94s



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

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

89,2% of all polled companies are expecting a healthy **growth** in **revenues** for the year 2015 compared with the previous year

Only 7,5% of all polled companies expect a **decrease** in **revenues** compared to the pervious year

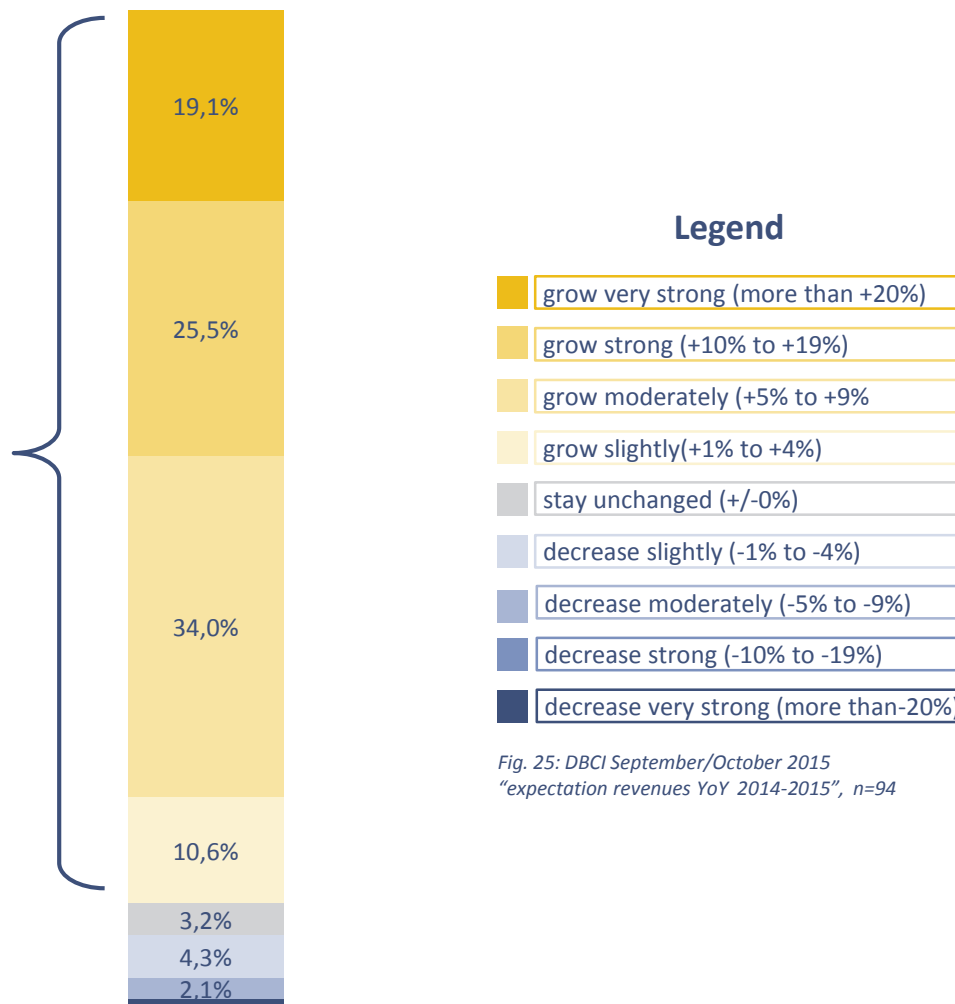
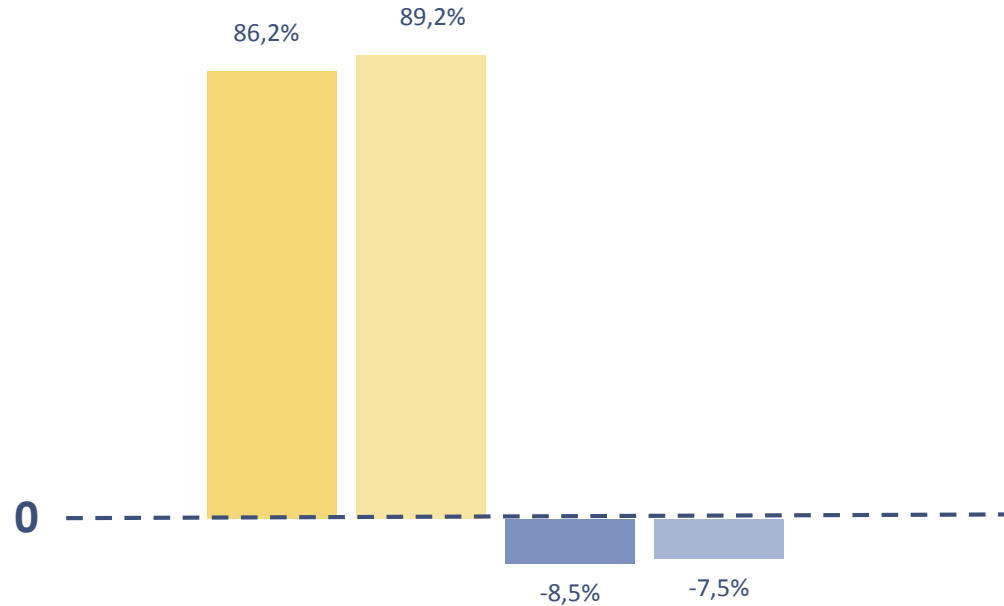


Fig. 25: DBCI September/October 2015  
“expectation revenues YoY 2014-2015”, n=94



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. 26: DBCI September/October 2015 "revenues YoY H1 2014-2015 and YoY 2014-2015", n=94

- Almost 90% of the polled companies in Germany, Austria and Switzerland expect to have a growth in revenues in 2015 compared to 2014
- Still 8,5% 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

   DE-AT-CH | Index – Long-term data series



Fig. a: DBCI „Index DE-AT-CH“ Long-term data series

DE-AT-CH | Business Situation – Long-term data series

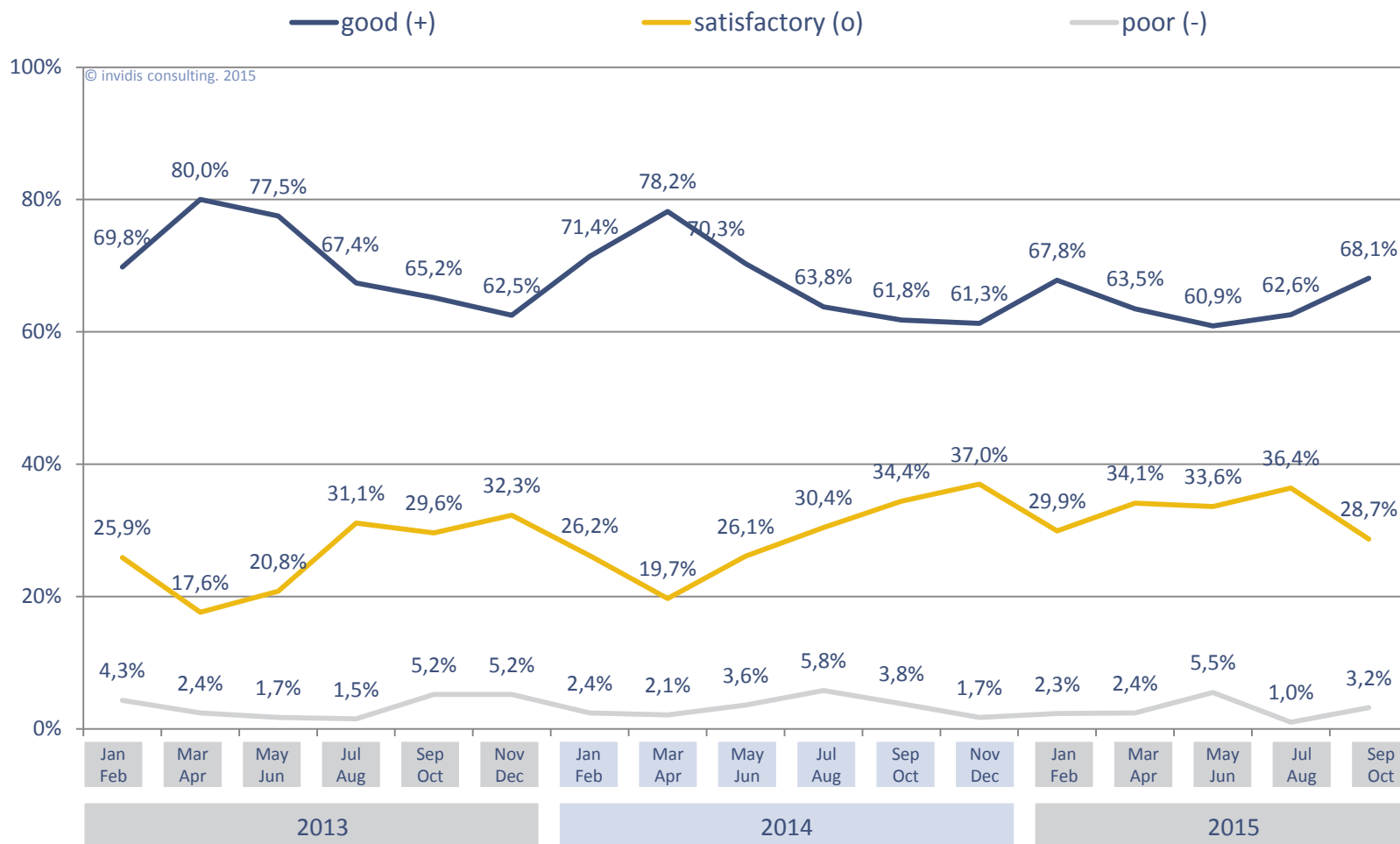


Fig. b: DBCI „Business Situation DE-AT-CH“ Long-term data series

DE-AT-CH | Expectations – Long-term data series

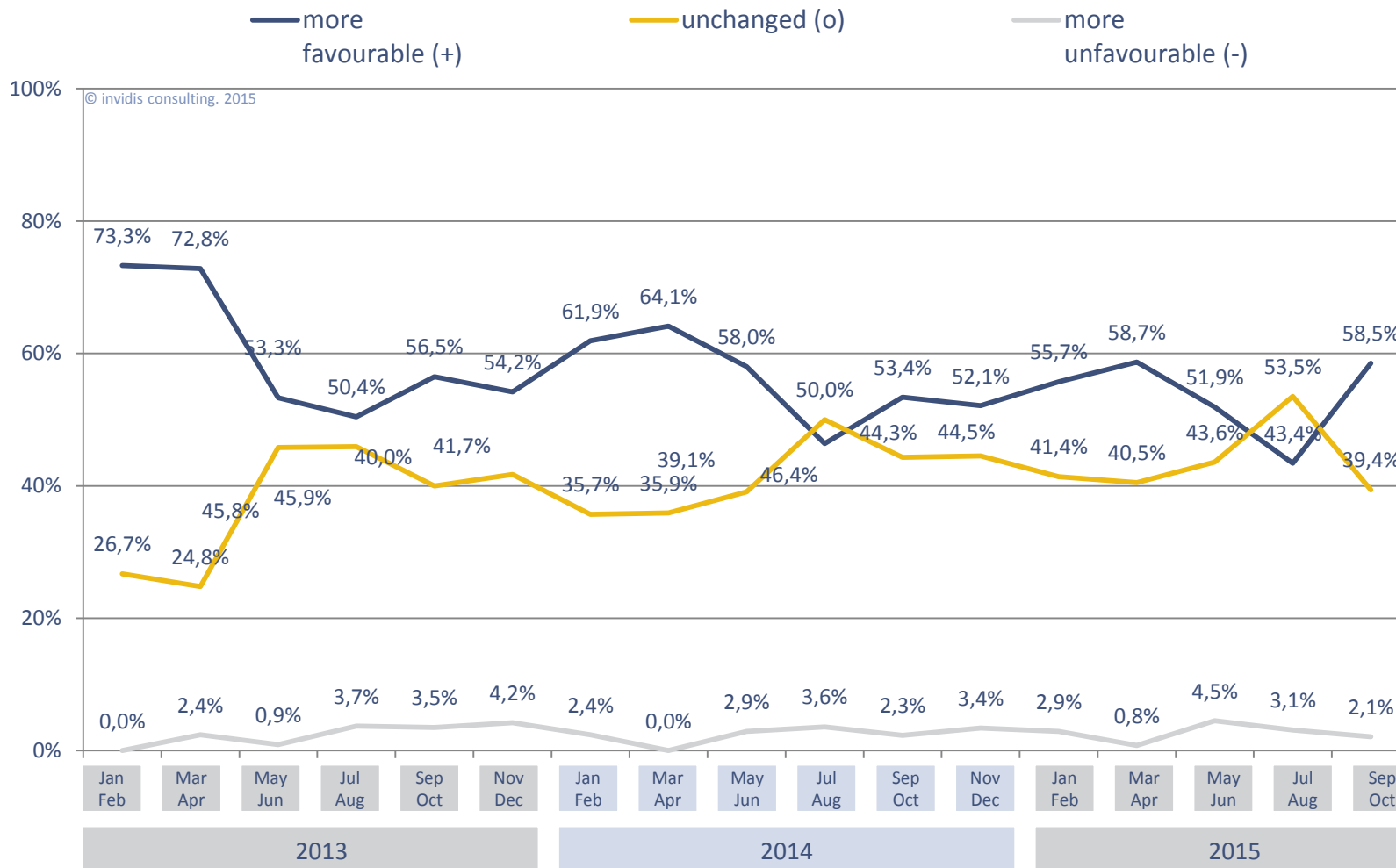


Fig. c: DBCI „Expectations DE-AT-CH“ Long-term data series

   DE-AT-CH | Index countries – Long-term data series

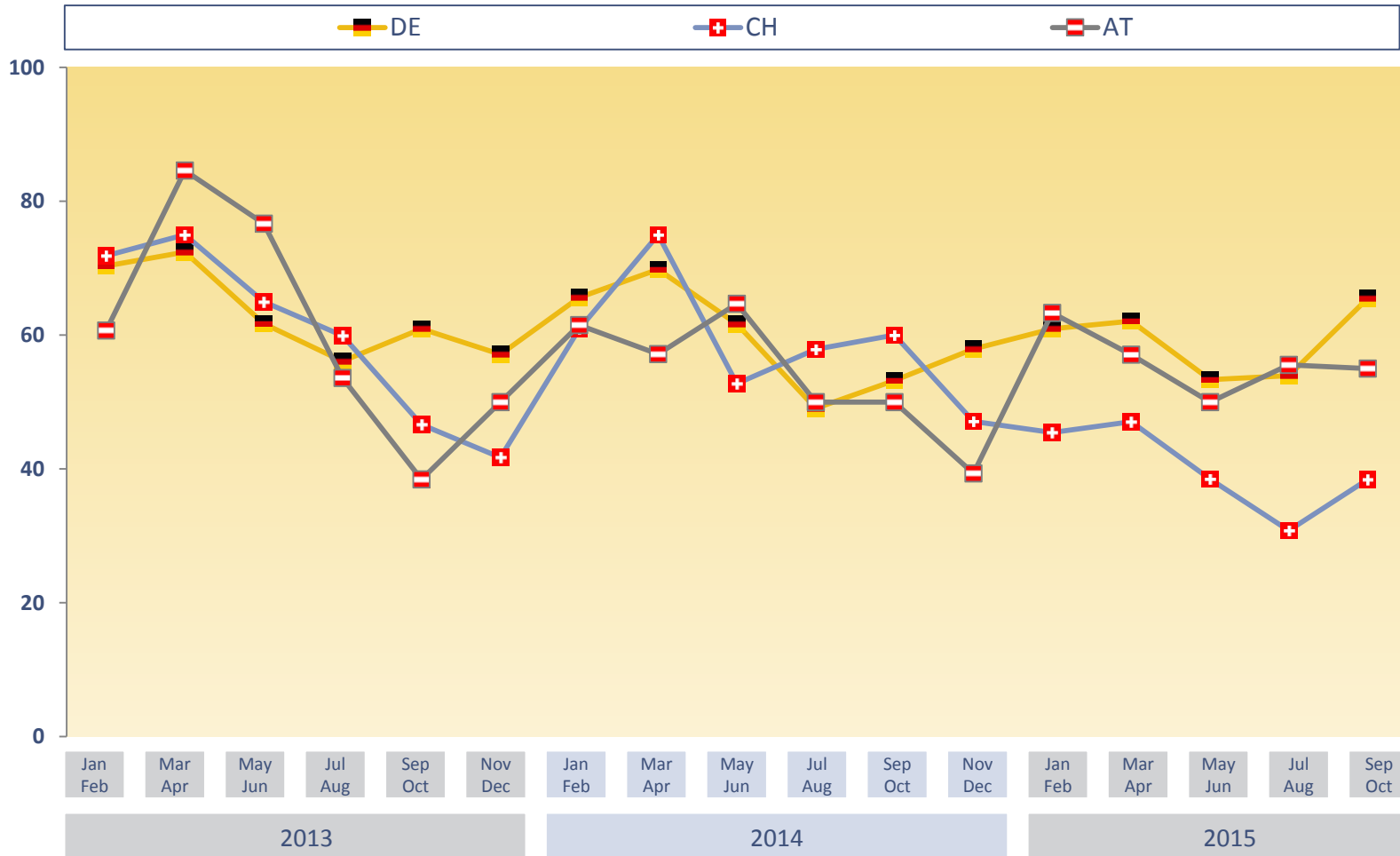


Fig. d: DBCI „Index DE-AT-CH“ Long-term data series

Germany | Business sentiment – Long-term data series

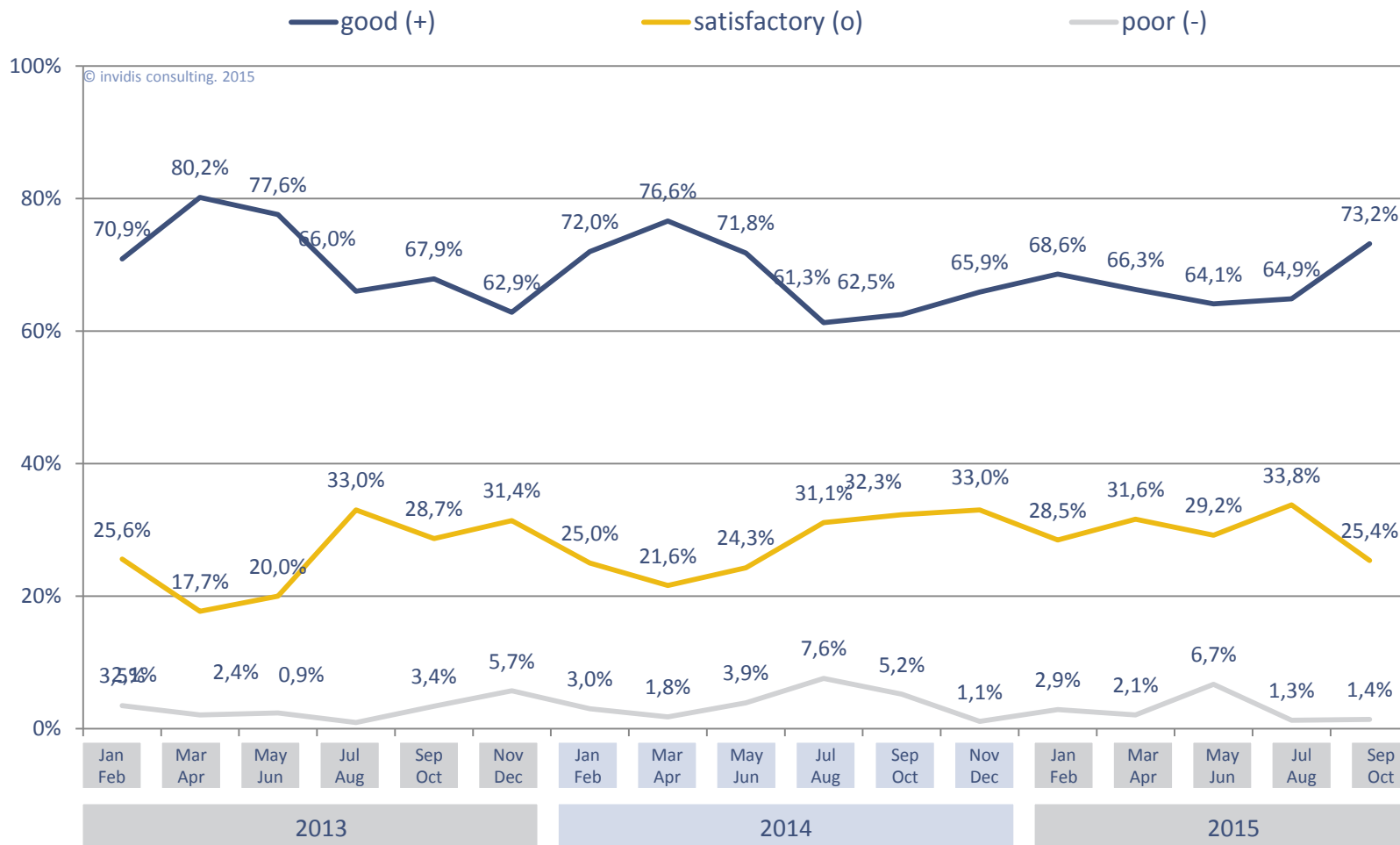


Fig. e: DBCI „Business Situation Germany“ Long-term data series



# Germany | Expectations – Long-term data series

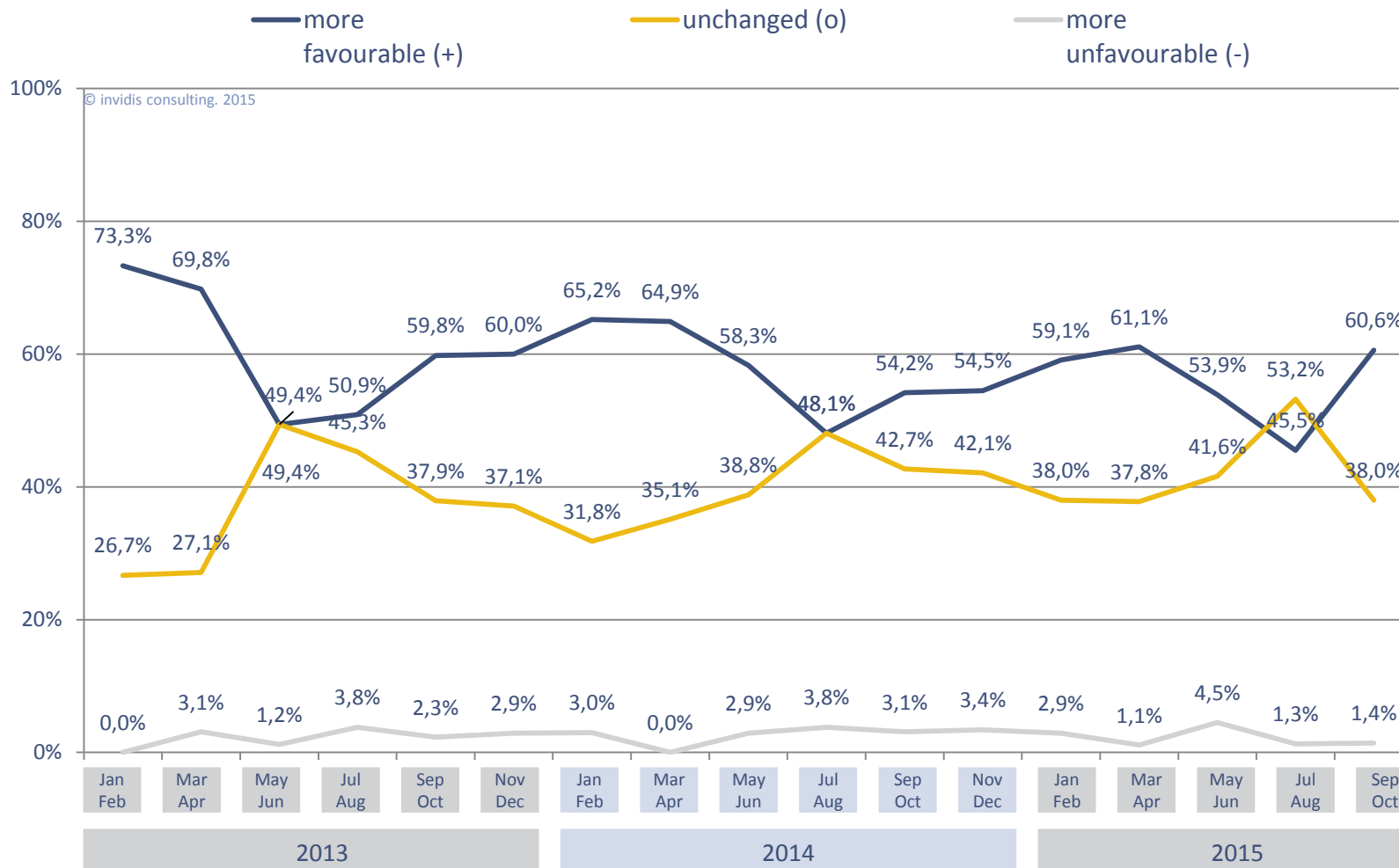


Fig. f: DBCI „Expectations Germany“ Long-term data series

**Austria | Business sentiment – Long-term data series**

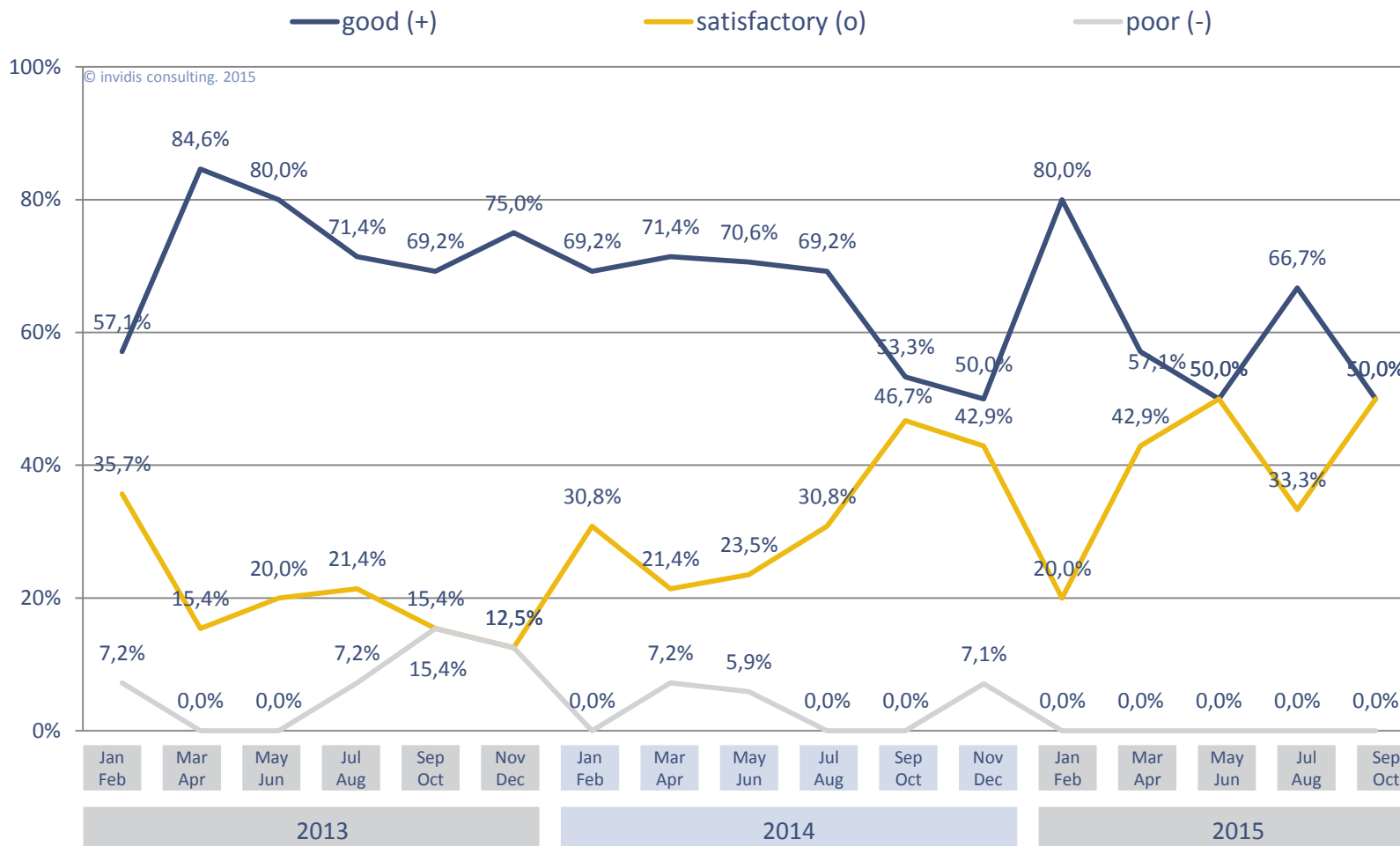


Fig. g: DBCI „Business Situation Austria“ Long-term data series

**Austria | Expectations – Long-term data series**

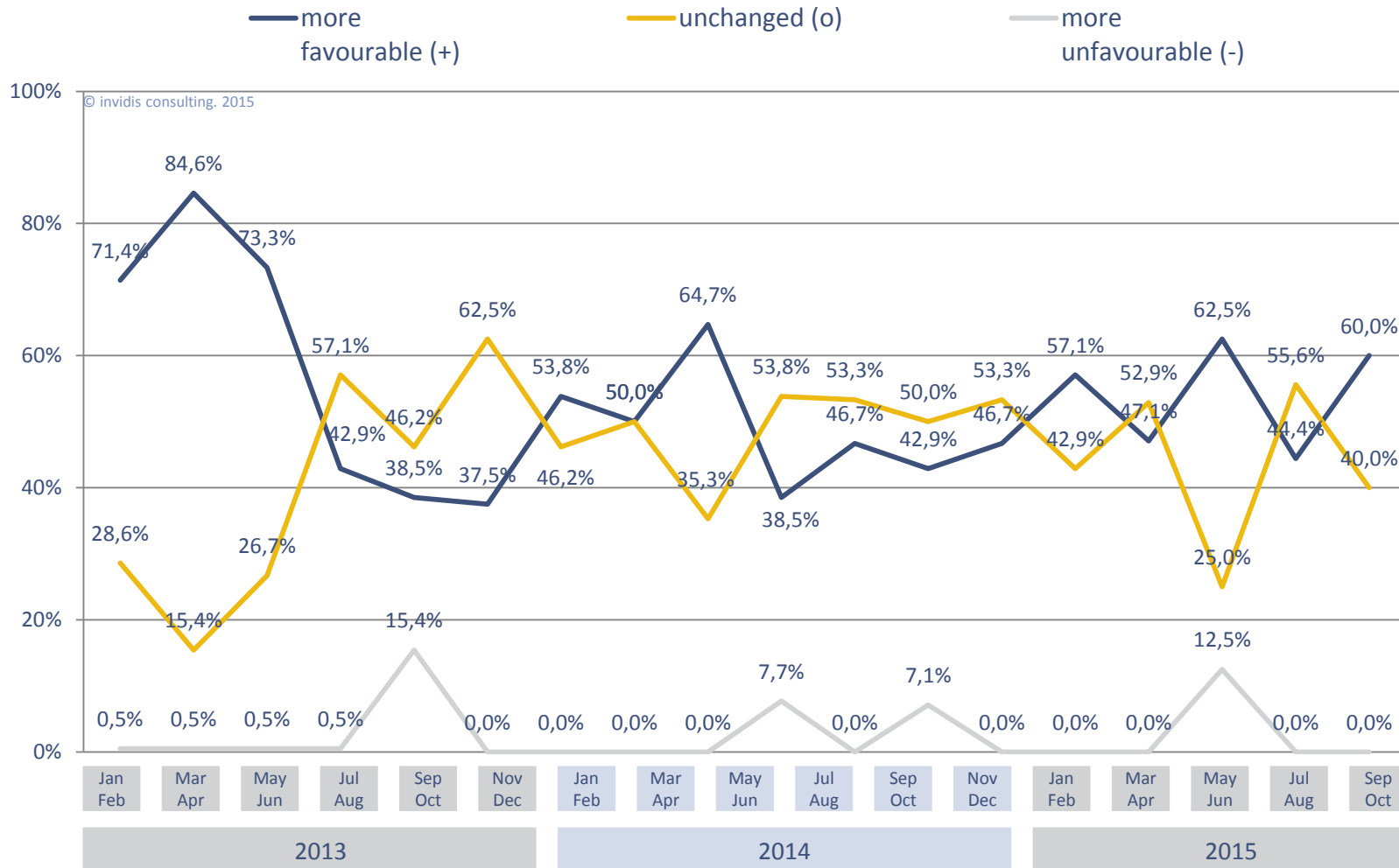


Fig. h: DBCI „Expectations Austria“ Long-term data series

**+** Switzerland | Business sentiment – Long-term data series

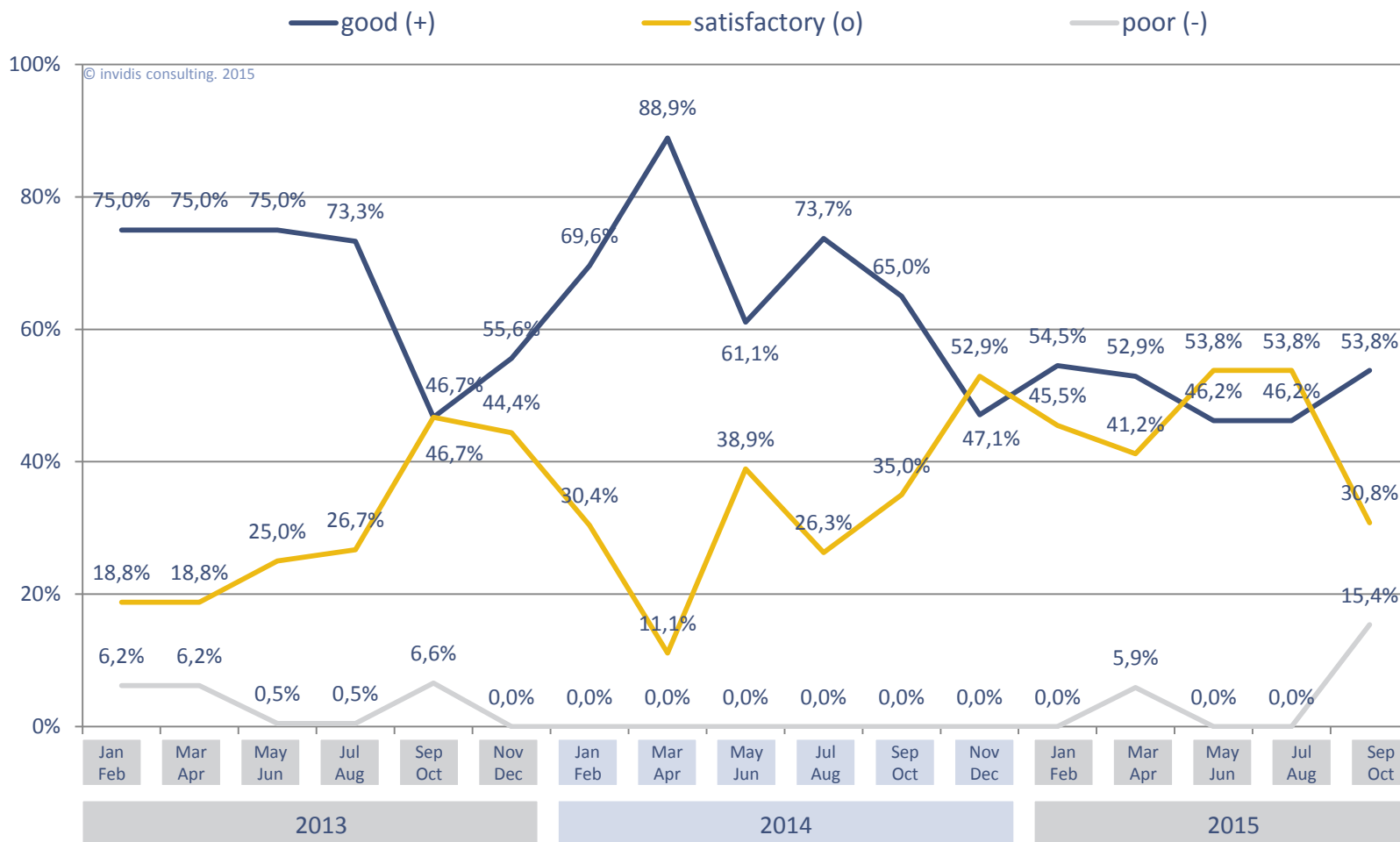


Fig. i: DBCI „Business Situation Switzerland“ Long-term data series

# Switzerland | Expectations – Long-term data series

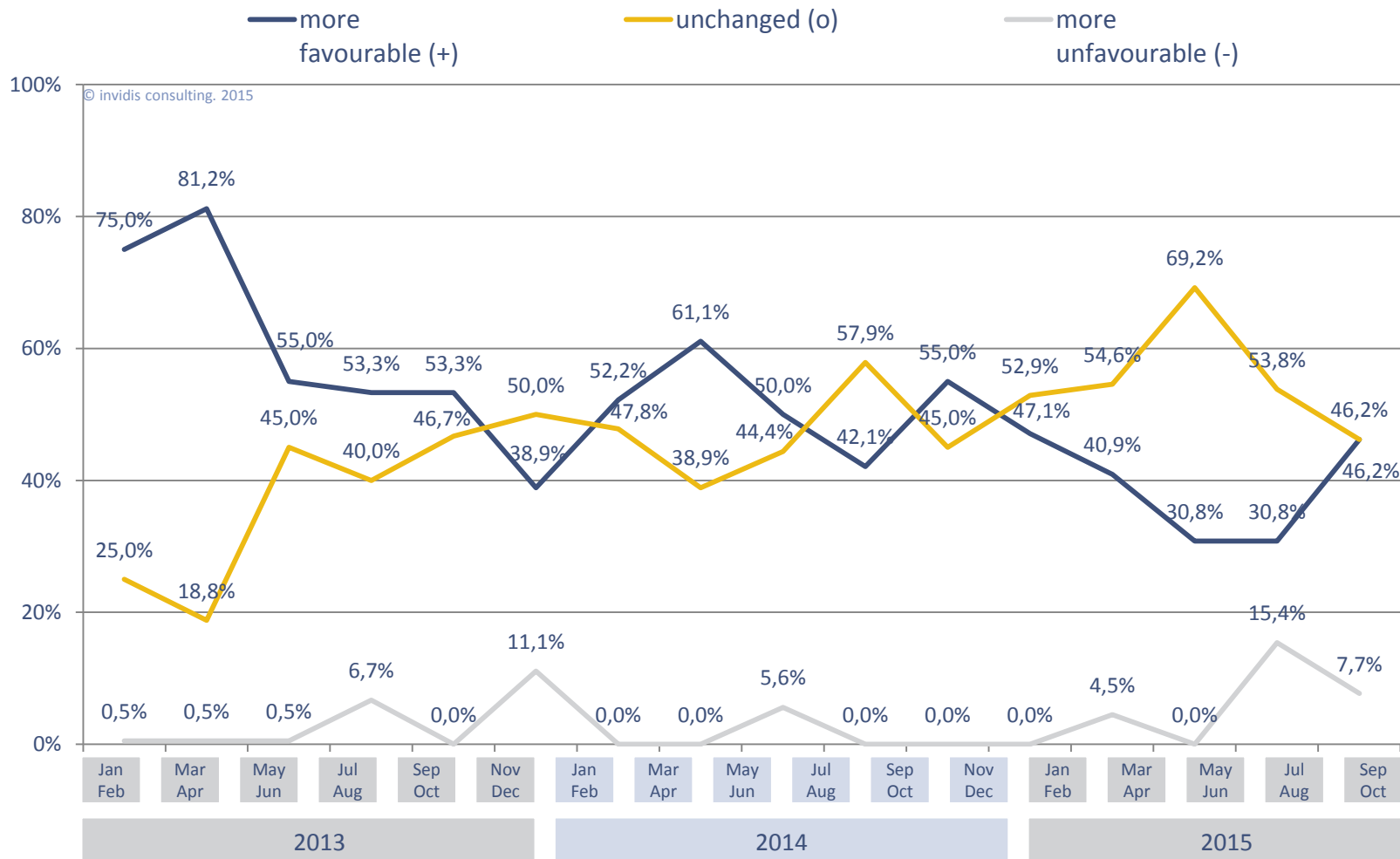


Fig. j: DBCI „Expectations Switzerland“ Long-term data series

Germany Austria Switzerland Displays | Business sentiment- Long-term data series

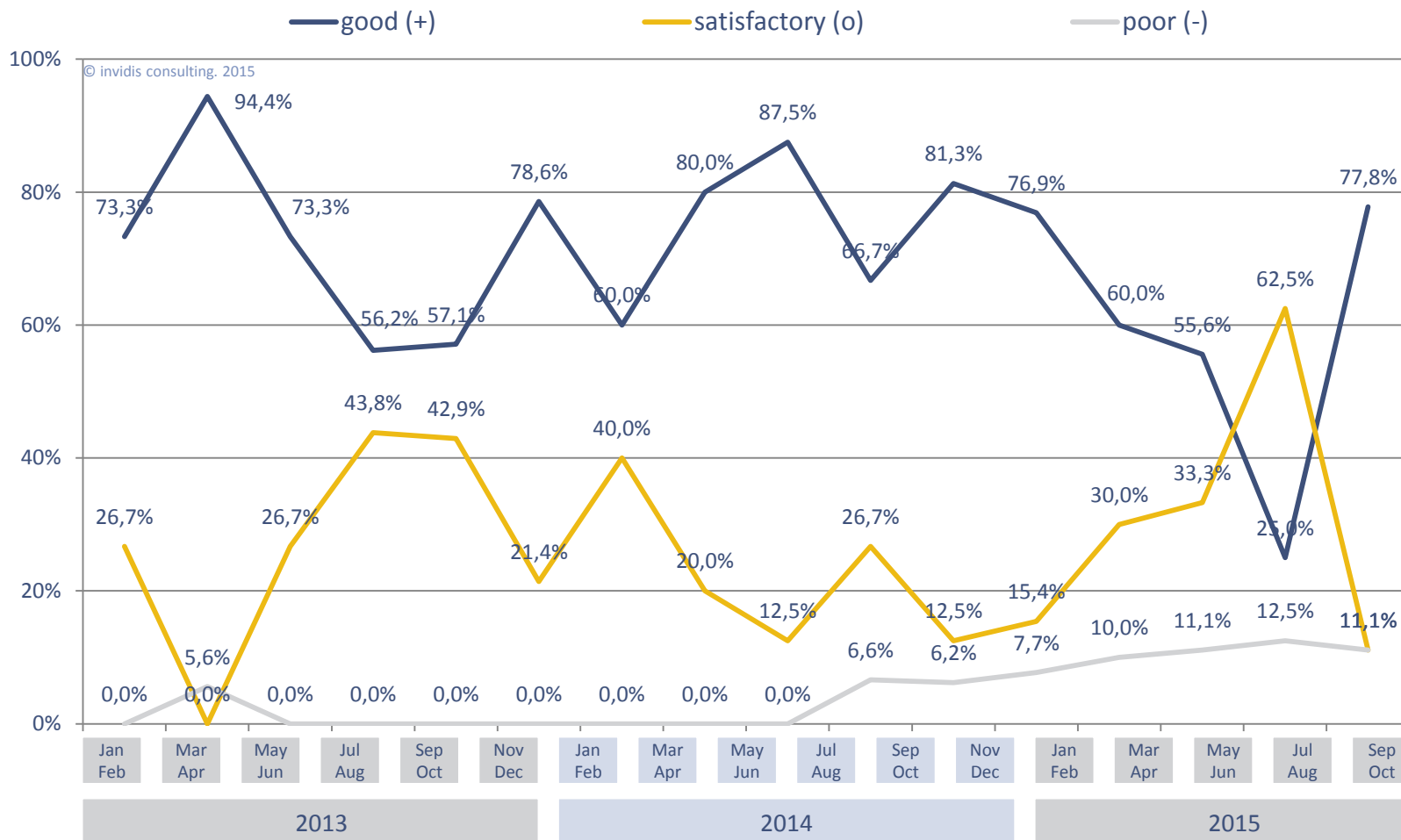


Fig. k: DBCI „Business Situation Displays“ Long-term data series

Germany Austria Switzerland Displays | Expectations - Long-term data series

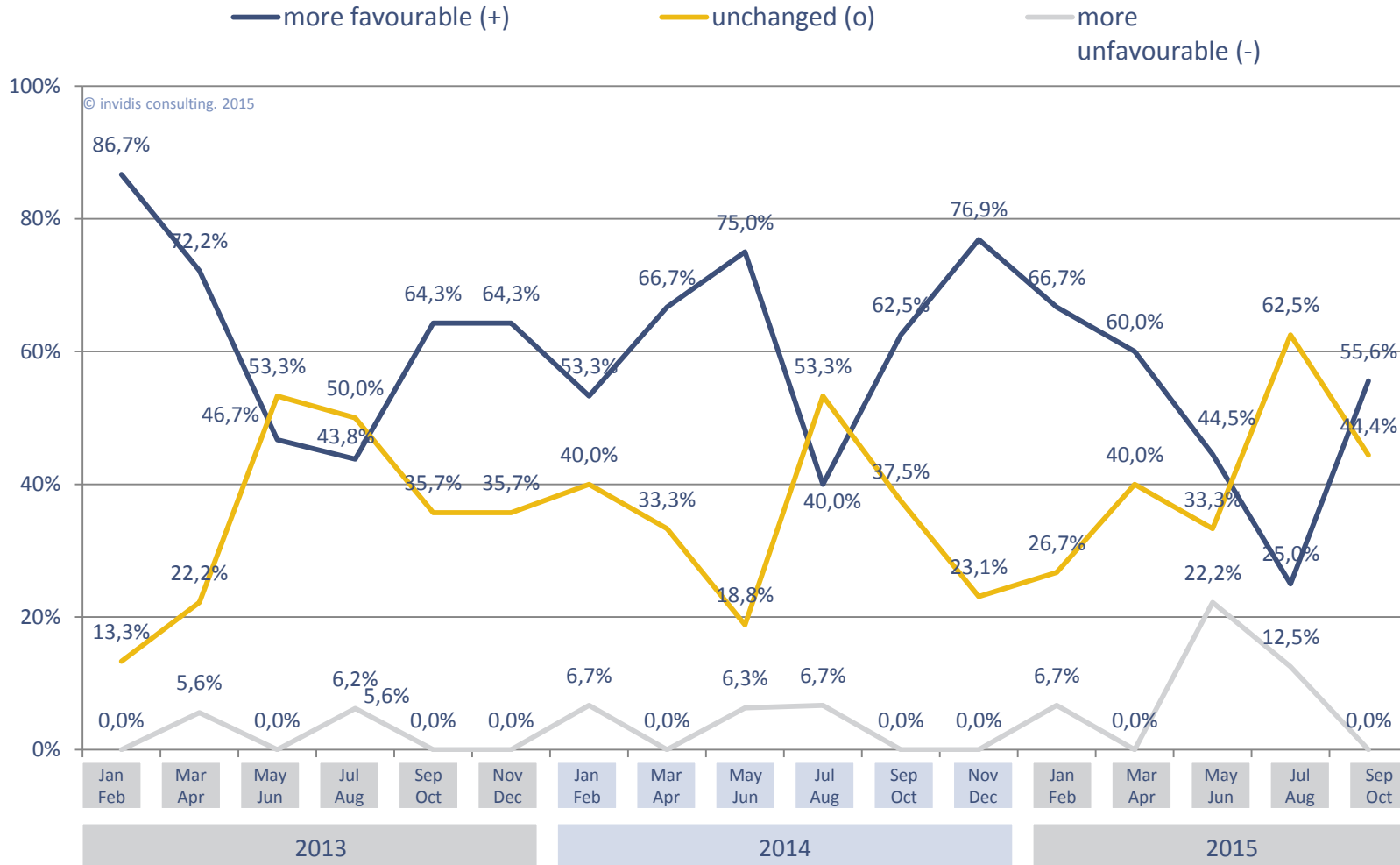


Fig. I: DBCI „Expectations Displays“ Long-term data series



Integrators | Business Sentiment – Long-term data series

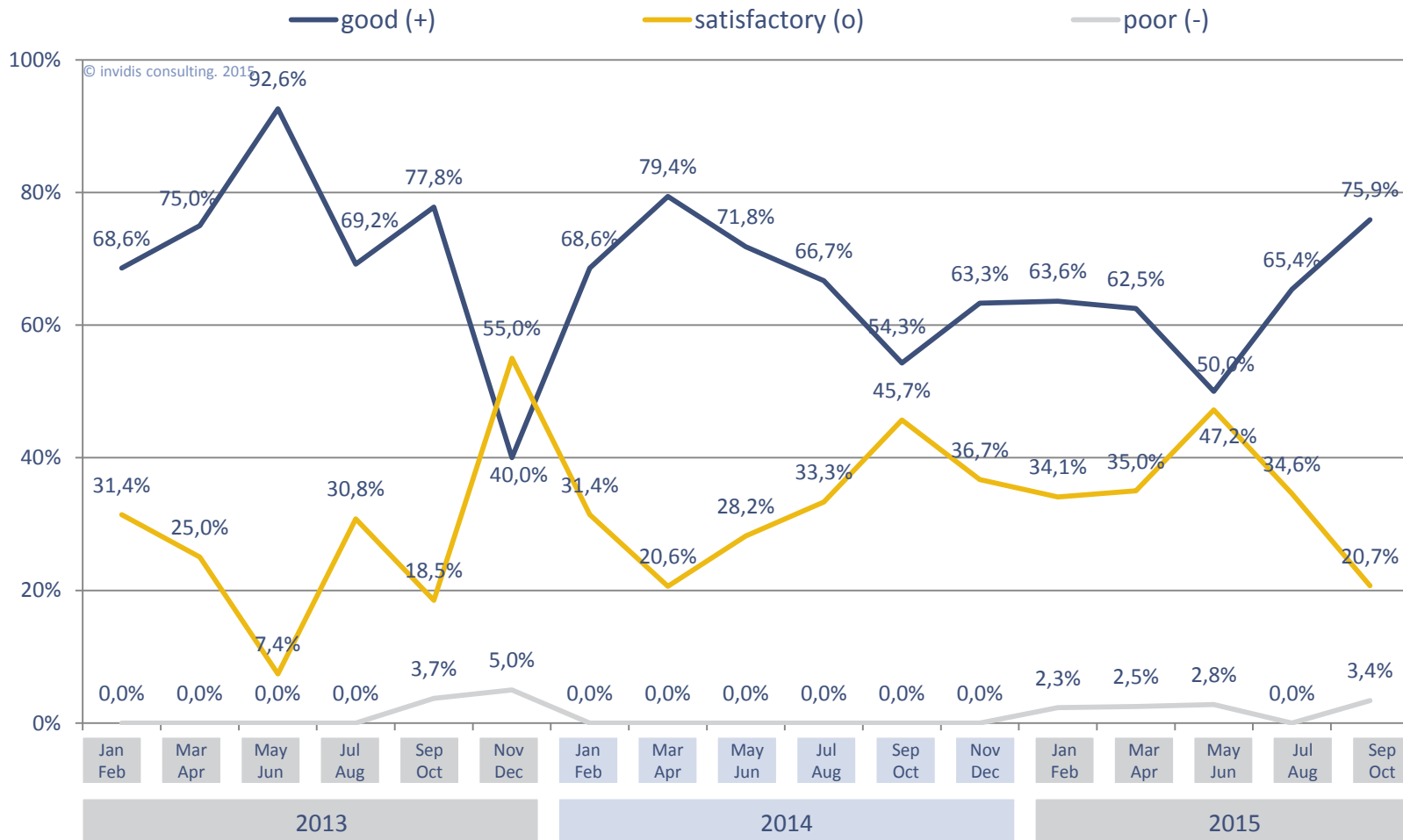


Fig. m. DBCI „Business Situation Integrators“ Long-term data series

Integrators | Expectations – Long-term data series

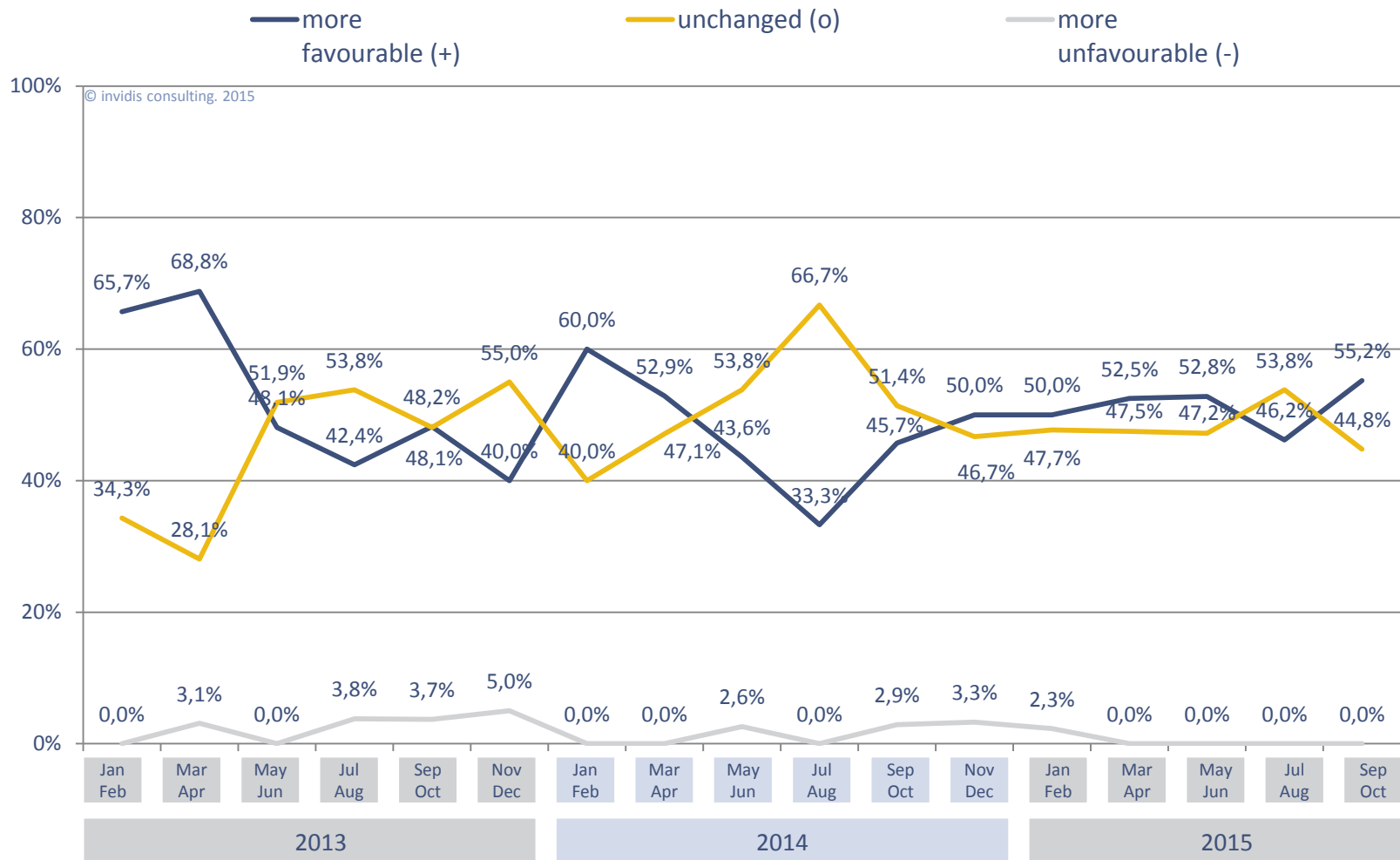


Fig. n: DBCI „Expectations Integrators“ Long-term data series

Software | Business Sentiment – Long-term data series

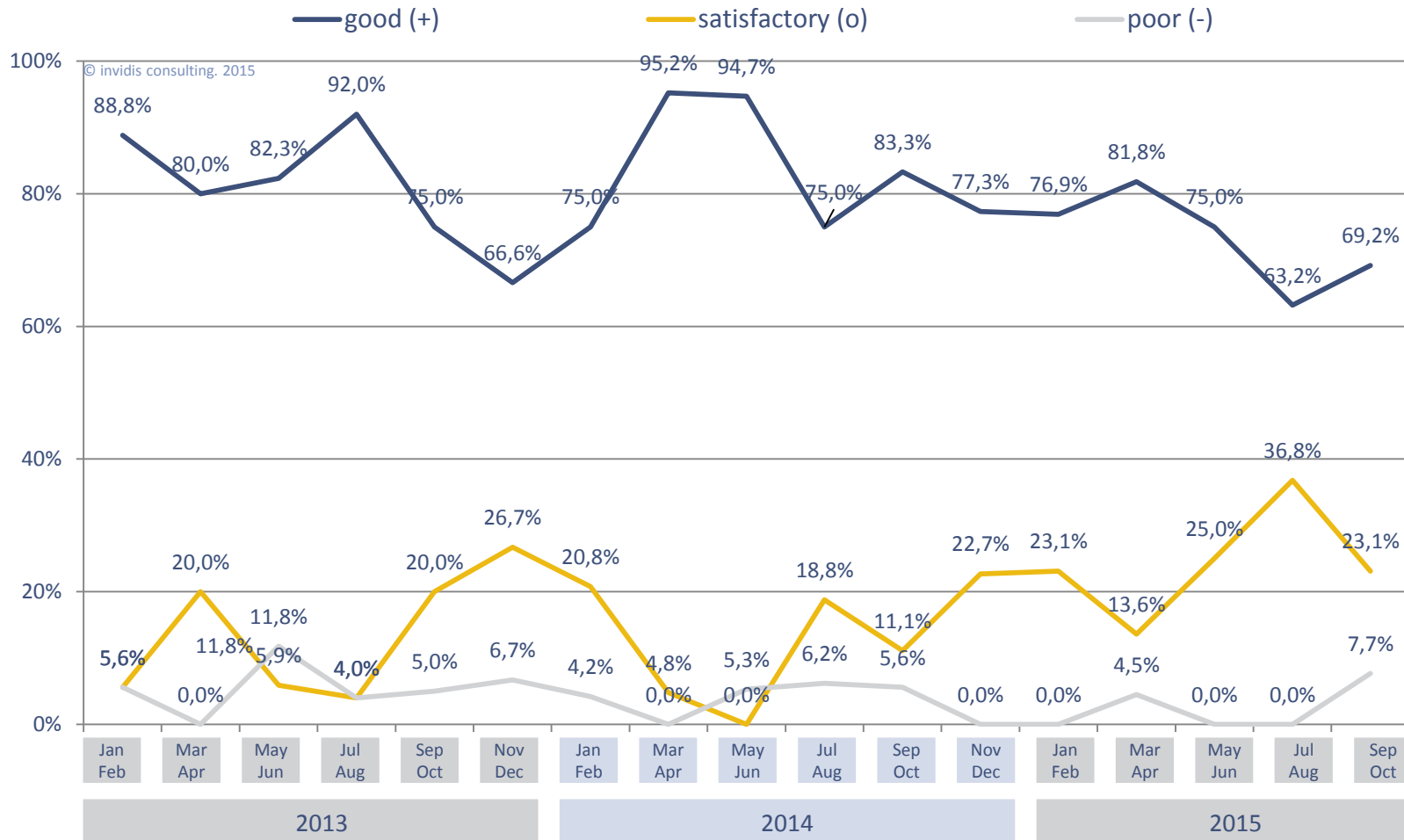


Fig. o: DBCI „Business Situation Software“ Long-term data series

Software | Expectations – Long-term data series

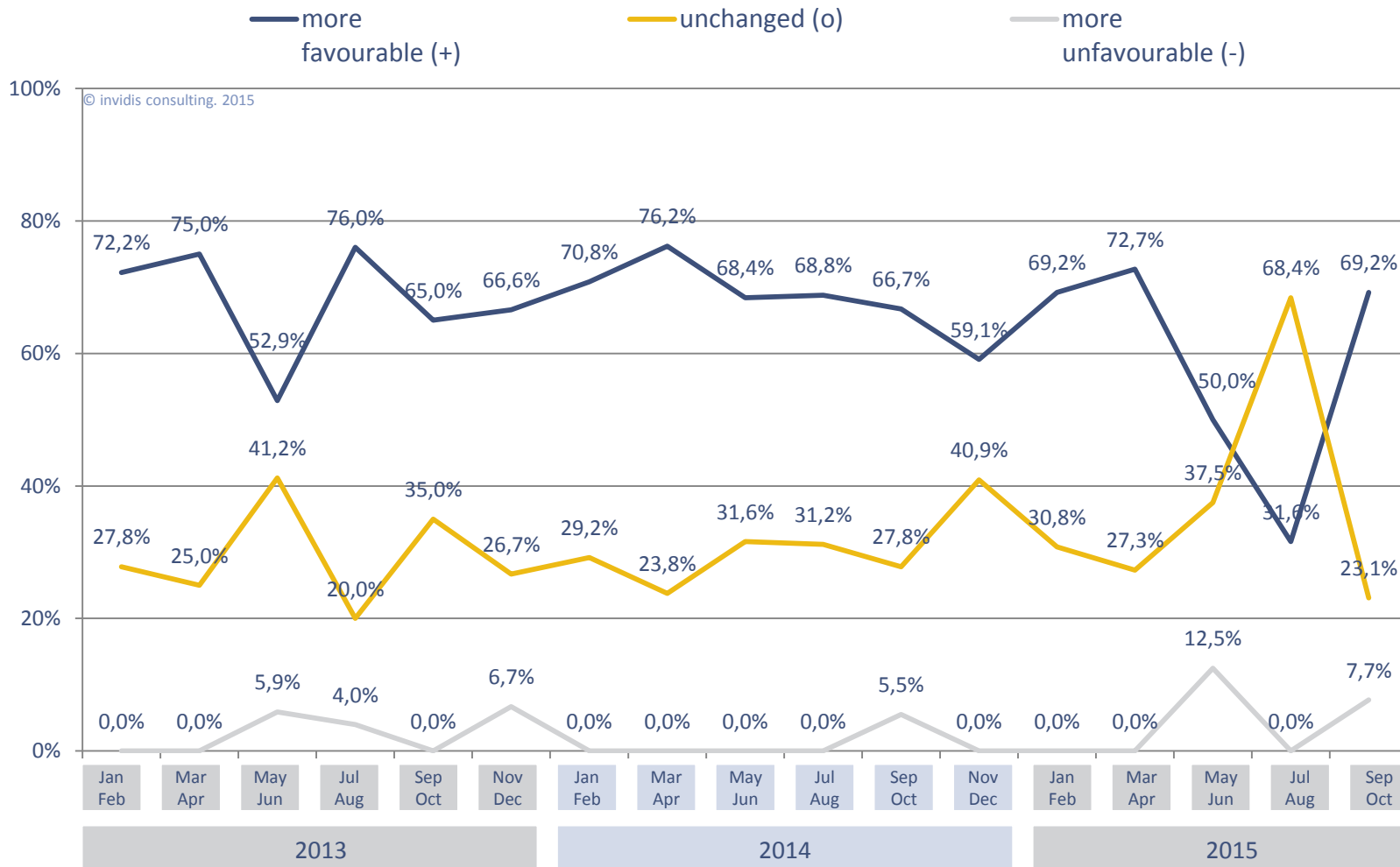


Fig. p: DBCI „Expectations Software“ Long-term data series

DooH | Business Sentiment – Long-term data series

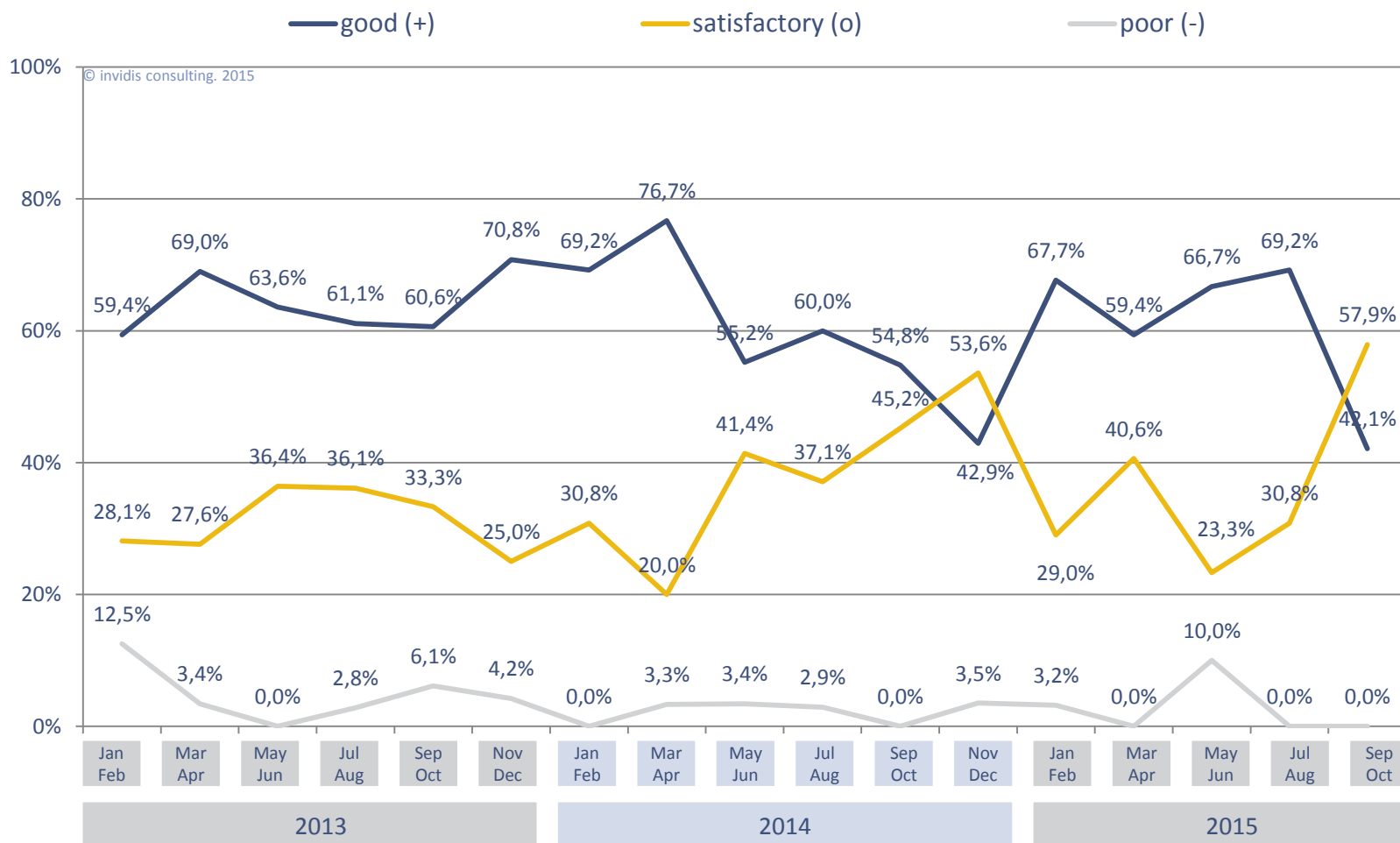


Fig. q: DBCI „Business Situation DooH“ Long-term data series

DooH | Expectations – Long-term data series

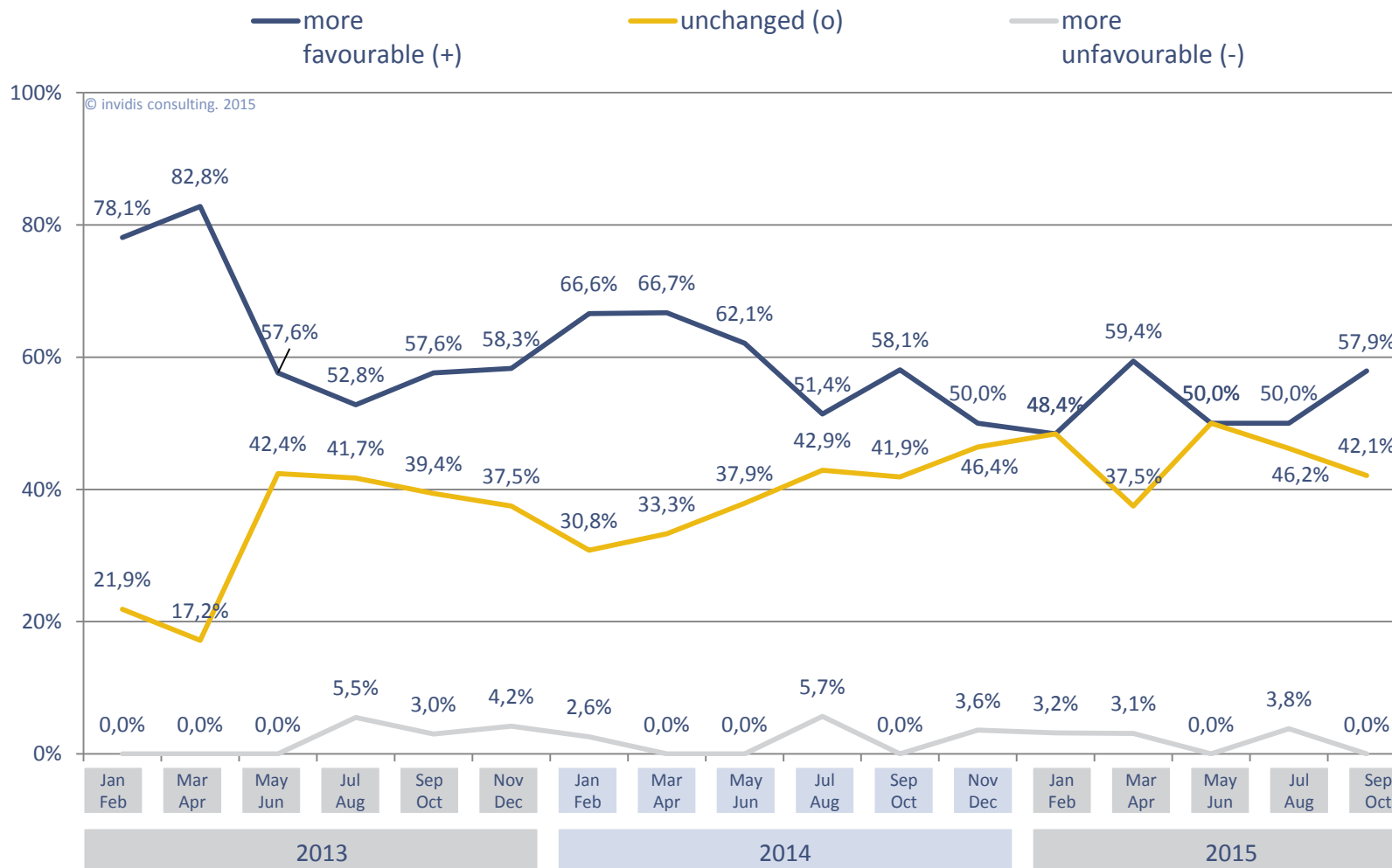


Fig. s: DBCI „Expectations DooH“ Long-term data series

## DBCI | Roadmap 2015 & Contact

<b>2015</b>	
November	← Nov./Dec.   2015/11/16
December	
<b>2016</b>	
January	← Jan./Feb.   2016/02/01
February	
March	← Mar./Apr.   2016/03/21
April	
May	← May./Jun.   2016/05/23
June	
July	← Jul./Aug.   2016/07/18
August	
September	← Sep./Oct.   2016/09/19
October	
November	← Nov./Dec.   2016/11/21
December	

- The next survey will take place in calendar weeks 44-45 of 2015
- The next planned publication date will be the 11<sup>th</sup> of November 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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