

Scandinavia

September | October 2015

DBCI



Digital Signage & DoOH
Business Climate Index

The pulse of the Digital Signage
and DoOH industry



invidis
CONSULTING

invidis research
2015 SK 500



DBCI Scandinavia - Introduction

- The OVAB Europe **D**igital Signage **B**usiness **C**limate Index (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**– third poll September/October 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: **63,48** base points
 - **88,5%** of the polled companies have a **positive outlook** for their business within the next six months
 - Only **11,5%** of the polled companies rate their current business situation as **negative**



Index | Digital Signage business sentiment remains positiv

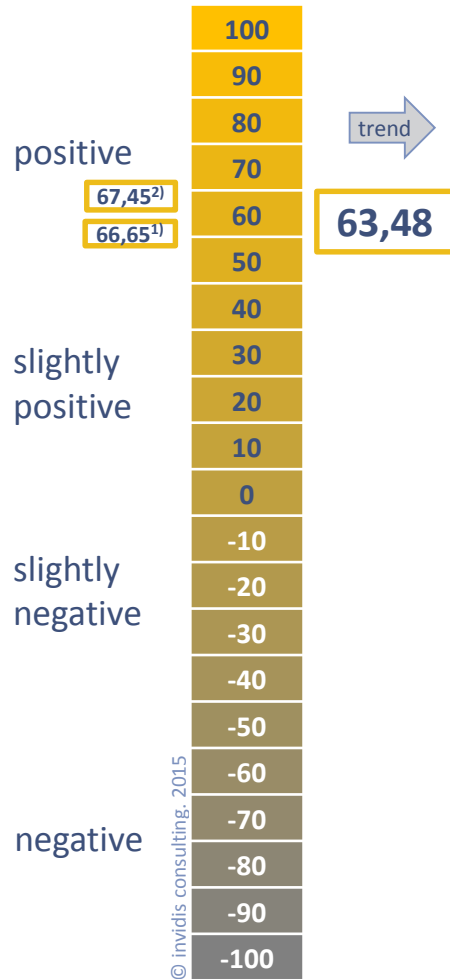


Fig. 1: DBCI SK September | October 2015 n=26
 1) DBCI May | June 2015
 2) DBCI July | August 2015

- The Digital Signage Business Climate Index Scandinavia has been surveyed for the third time in 2015. The index fell marginally from 67,45 base points by 3,97 to 63,48 base points.
- The very 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 become slightly more conservative, with 50% of the market participants rating their situation as “good”
- The outlook for the next six months has further increased, with now almost 90% of the polled companies expecting “more favourable” business conditions for their products and services

Further Research

- 76% of the polled companies in Scandinavia expect to have a growth in revenues in 2015 compared to 2014
- Still 28% of all polled companies had to accept a decline in revenues in the first six months of 2015. However many of those companies are expecting to have balance the losses at the end of the year.

Survey facts

- Participants: n=26
- Region: Denmark, Sweden, Norway, Finland & Iceland
- Time frame: 2015 calendar weeks 34-35



Status Quo | More conservative current business situation

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

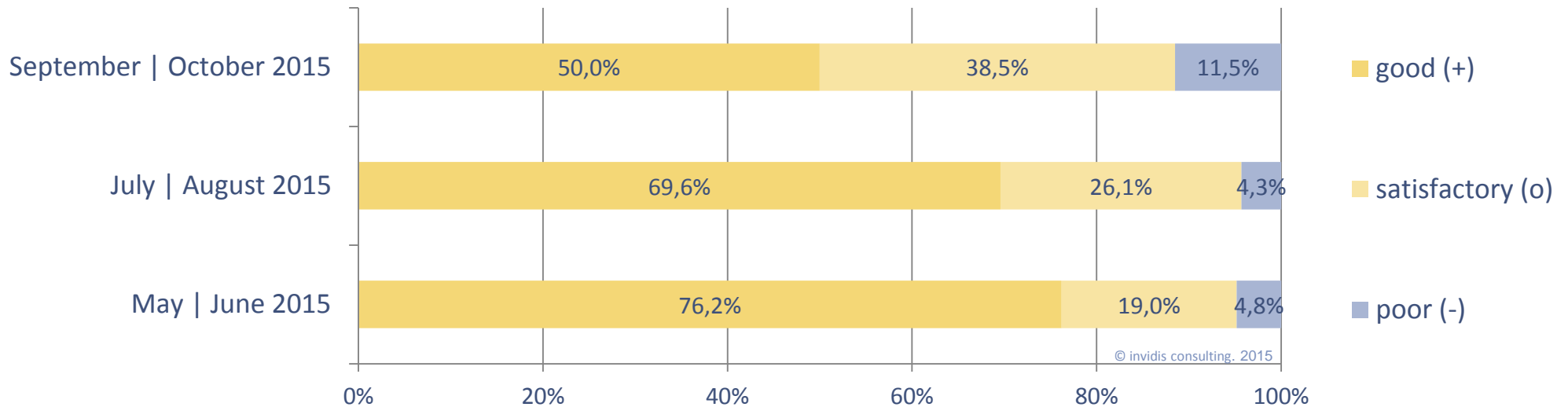


Fig. 2: DBCI SK September | October 2015 "business situation", n=26



Expectations | Very optimistic outlook for the next six months

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

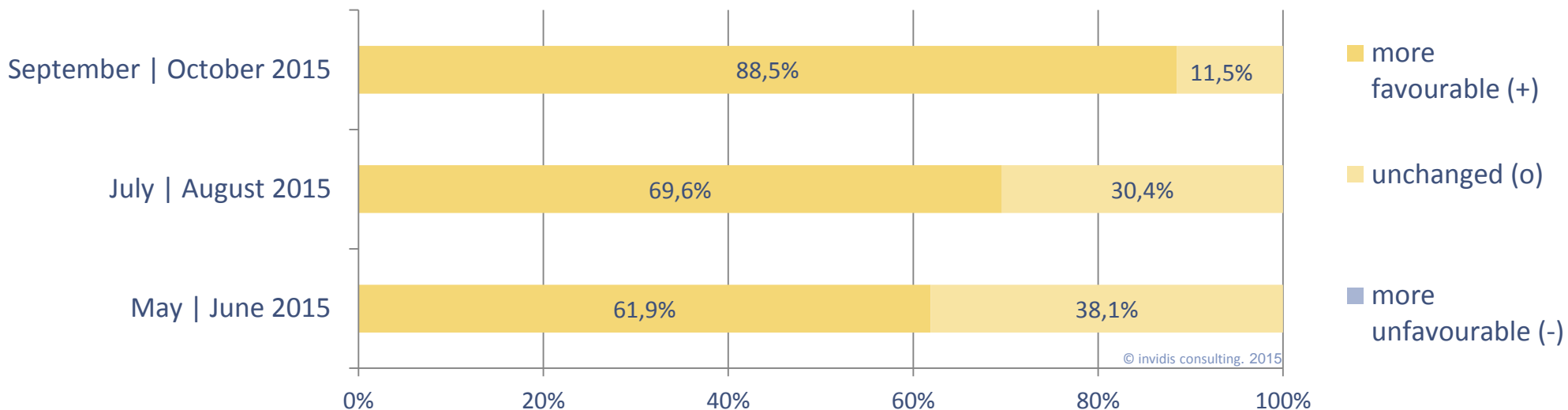


Fig. 3: DBCI SK September | October 2015 "business expectations", n=26



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.”

64% 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 **28%** of all polled companies had to accept a **decrease** in **revenues** compared to the previous year

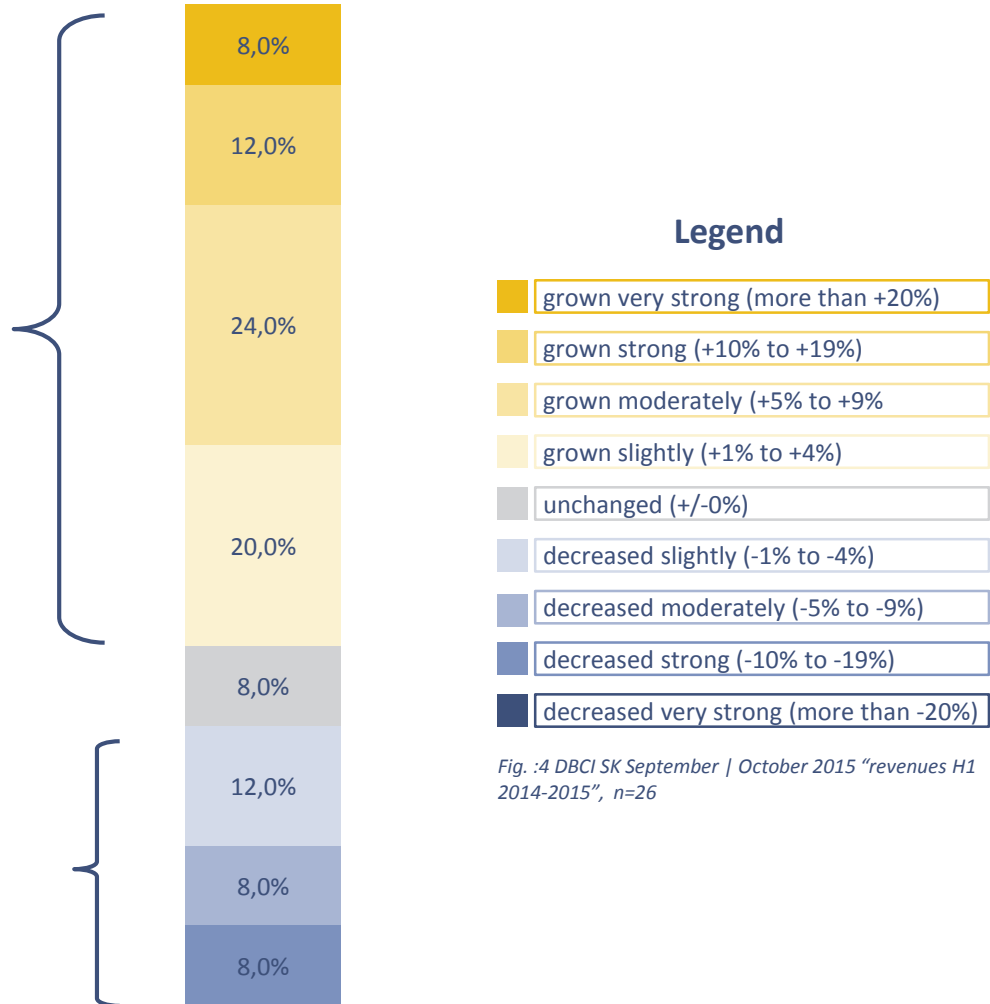


Fig. :4 DBCI SK September | October 2015 “revenues H1 2014-2015”, n=26



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

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

76% of all polled companies are expecting a healthy **growth** in **revenues** for the year 2015 compared with the previous year

Only 4% of all polled companies expect a **decrease** in **revenues** compared to the pervious year

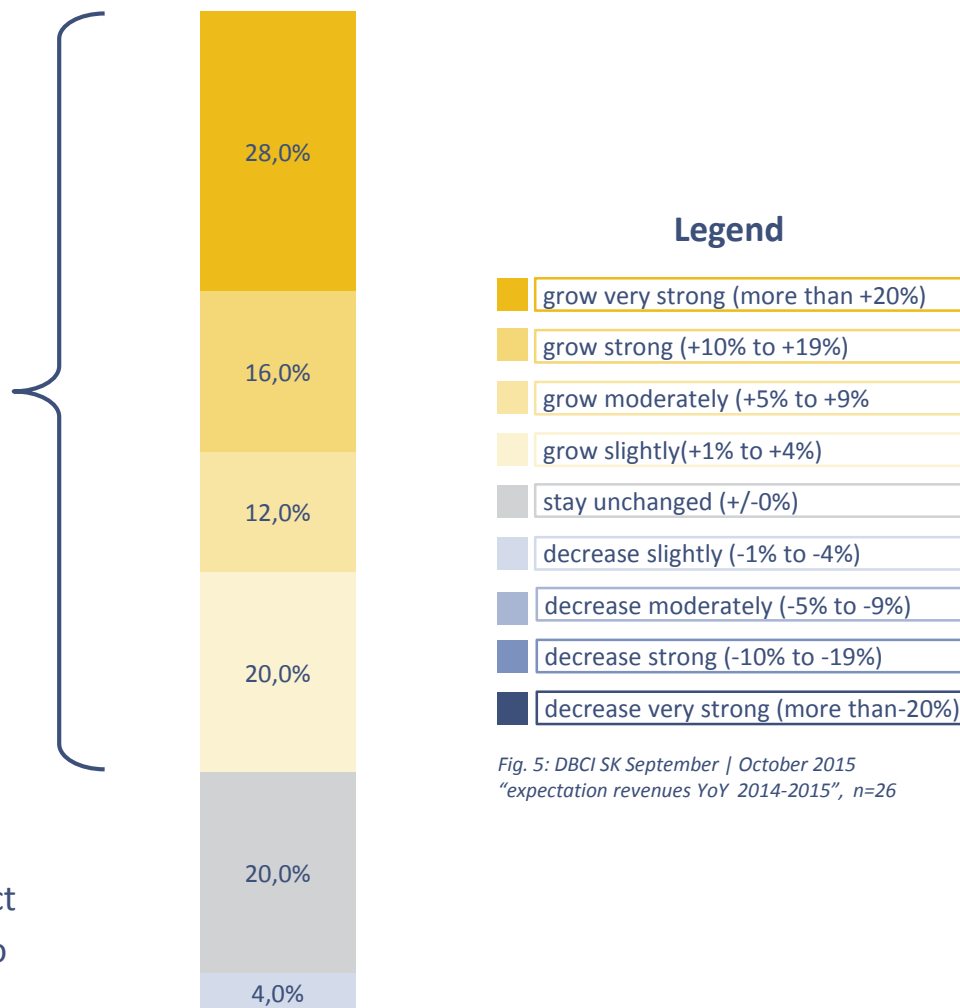
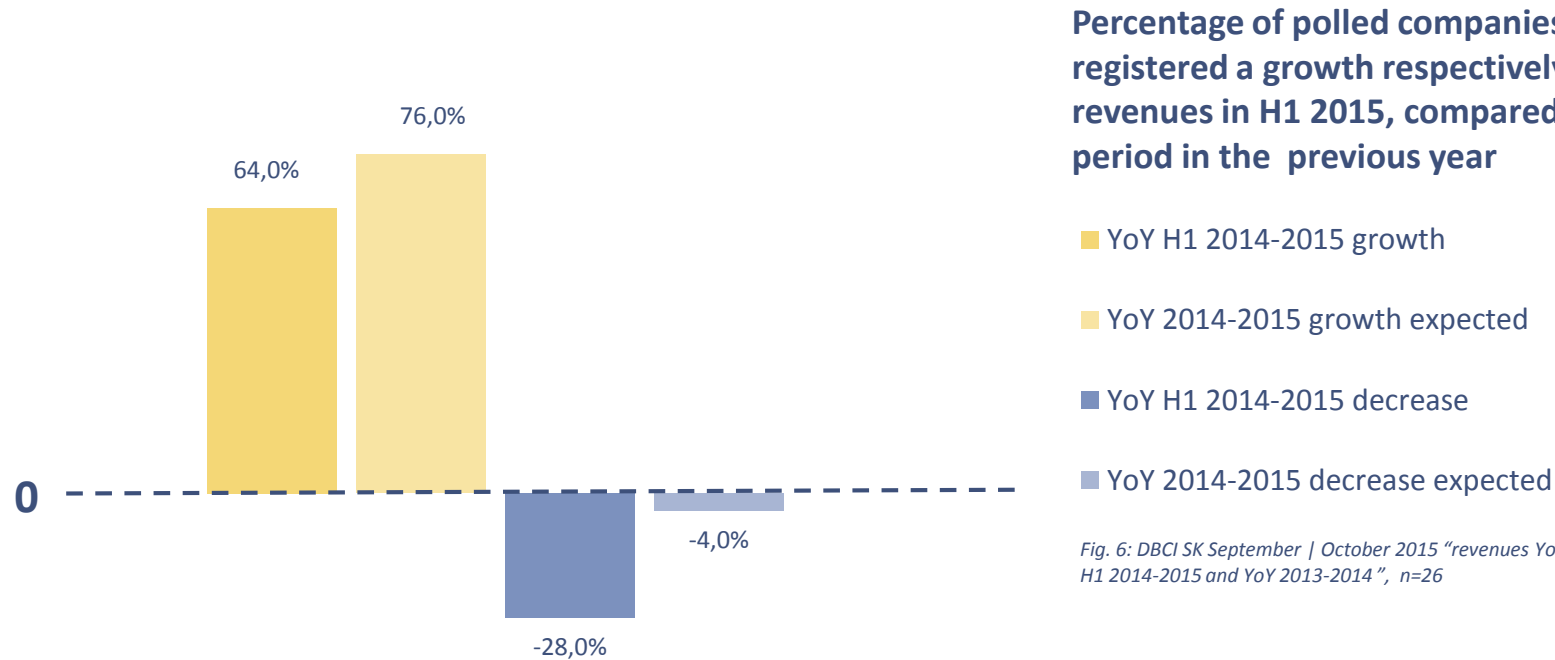


Fig. 5: DBCI SK September | October 2015
“expectation revenues YoY 2014-2015”, n=26



Further research | First semester (H1) losses expected to be contained by December



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. 6: DBCI SK September | October 2015 "revenues YoY H1 2014-2015 and YoY 2013-2014", n=26

- 76% of the polled companies in Scandinavia expect to have a growth in revenues in 2015 compared to 2014
- Still 28% of all polled companies had to accept a decline in revenues in the first six months of 2015. However many 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



DBCI | Roadmap 2015 & Contact

2015
January
February
March
April
May
June
July
August
September
October
November
December

Nov./Dec. | 2015/10/09

- The next survey will take place in calendar week 43-44 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.

Contact

Daniel Russell | Research Analyst
invidis consulting GmbH
Rosenheimer Str. 145e
81671 München
Daniel.Russell@invidis.com
Phone: +49 89 2000416-21
Mobile: +49 151 62438503
Fax: +49 1805 5224 301