

Scandinavia  
November | December  
2015

**DBCI**



Digital Signage & Dooh  
Business Climate Index

The pulse of the Digital Signage  
and Dooh industry



**invidis**  
CONSULTING

invidis research  
2015 SK 600



# Index | Digital Signage market with robust business sentiment



- The digital Signage Business Climate Index Scandinavia has decreased for the second time running. It fell by 10,94 base points from 63,48 base points to 52,55 base points.
- The decline of the index has been definite. However, it still is well in the *positive* region of the scale. As over 80% of the market participants are still satisfied or more with their current business situation
- At the same time the optimism towards the near future has seen a clear decline since the last survey. Yet still well over 65% of all polled companies expect a *more favourable* situation for their products and services in the Digital Signage and Digital out of Home market within the next six months.

### Further Research

- The market leaders among the distributors in Scandinavia are Also, TD Maverick followed by Atea and Ingram Micro. Between 35% and 75% of the market participants have worked with those competitors.
- 48% of the DooH market has seen a rise in bookings in the current year. The overall market is expected to register a healthy increase in the number of advertising booked in 2015

Fig. 1: DBCI Scandinavia November | December 2015 n=39; Participants: n=39; region: Denmark, Sweden, Norway, Finland & Iceland; time frame: 2015 calendar weeks 46-47



# Status Quo | Consistent positive level for current business situation

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

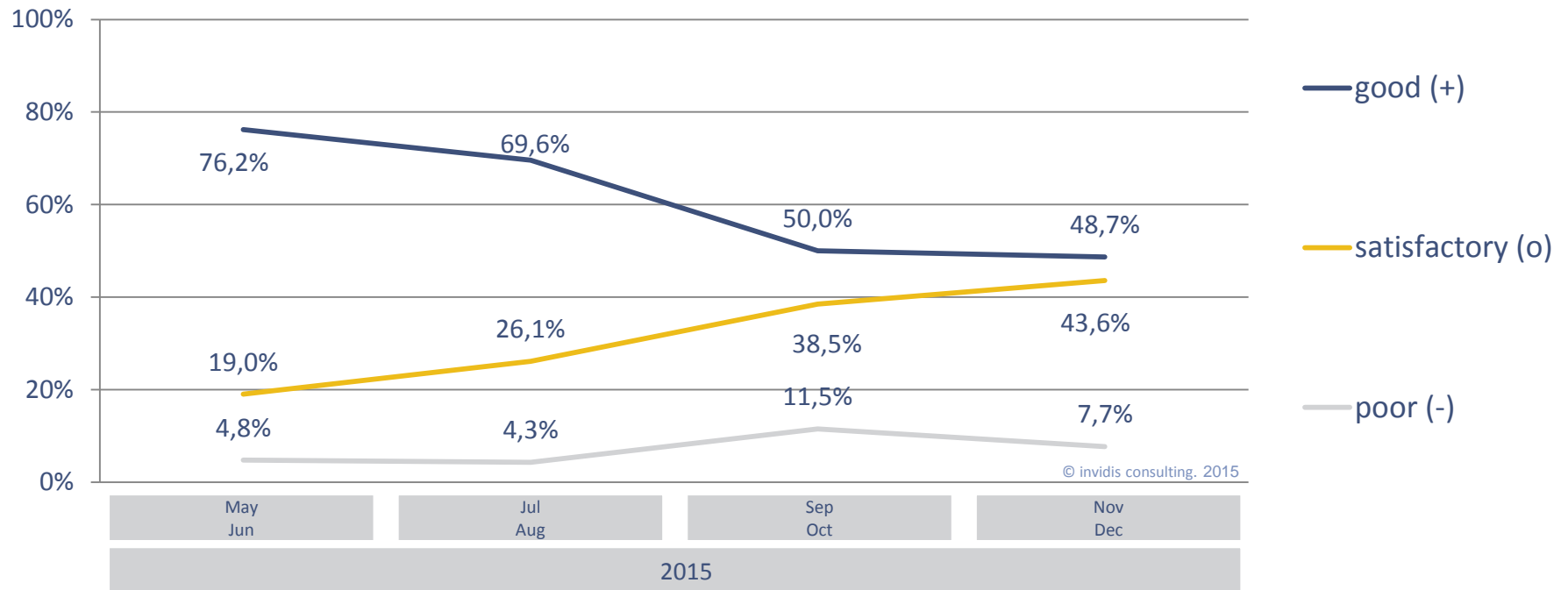


Fig. 2: DBCI Scandinavia November | December 2015 "business situation", n=26



# Expectations | More conservative outlook for the next six months

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

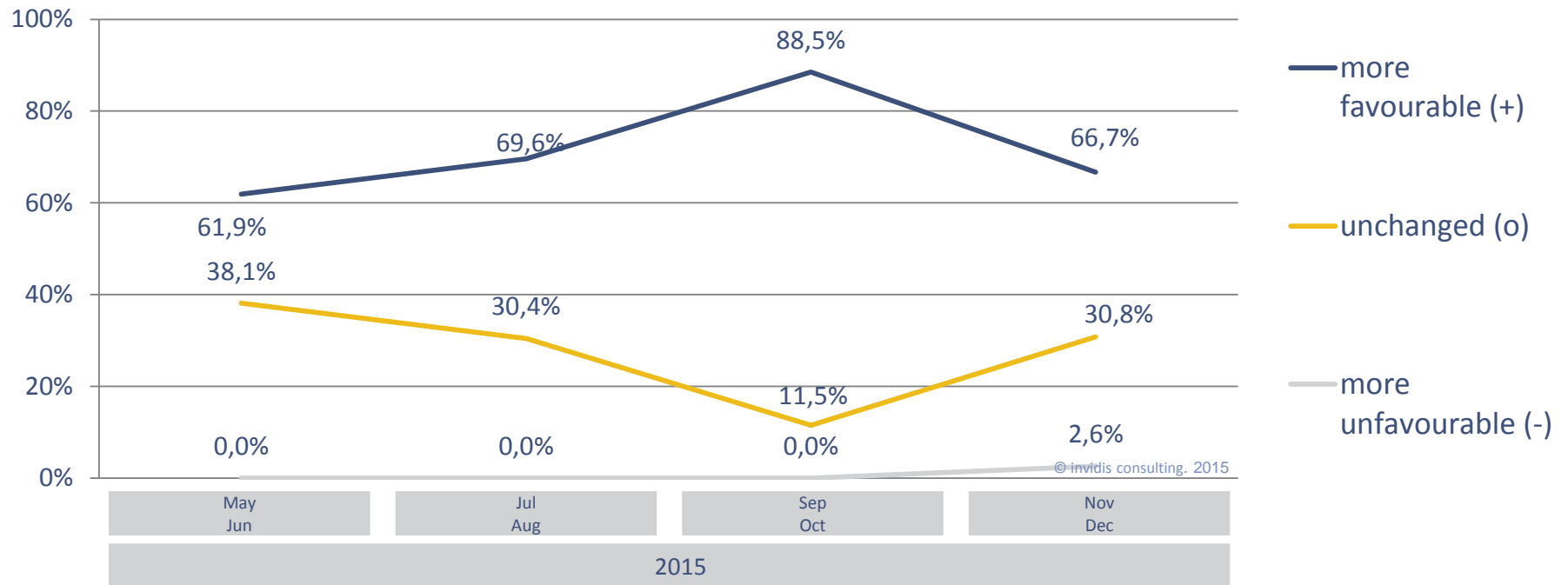


Fig. 3: DBCI Scandinavia November | December 2015 "business expectations", n=26



## Further research | The market is dominated by the Top 4 distributors

**Question:** „With which distributors do you work together?“

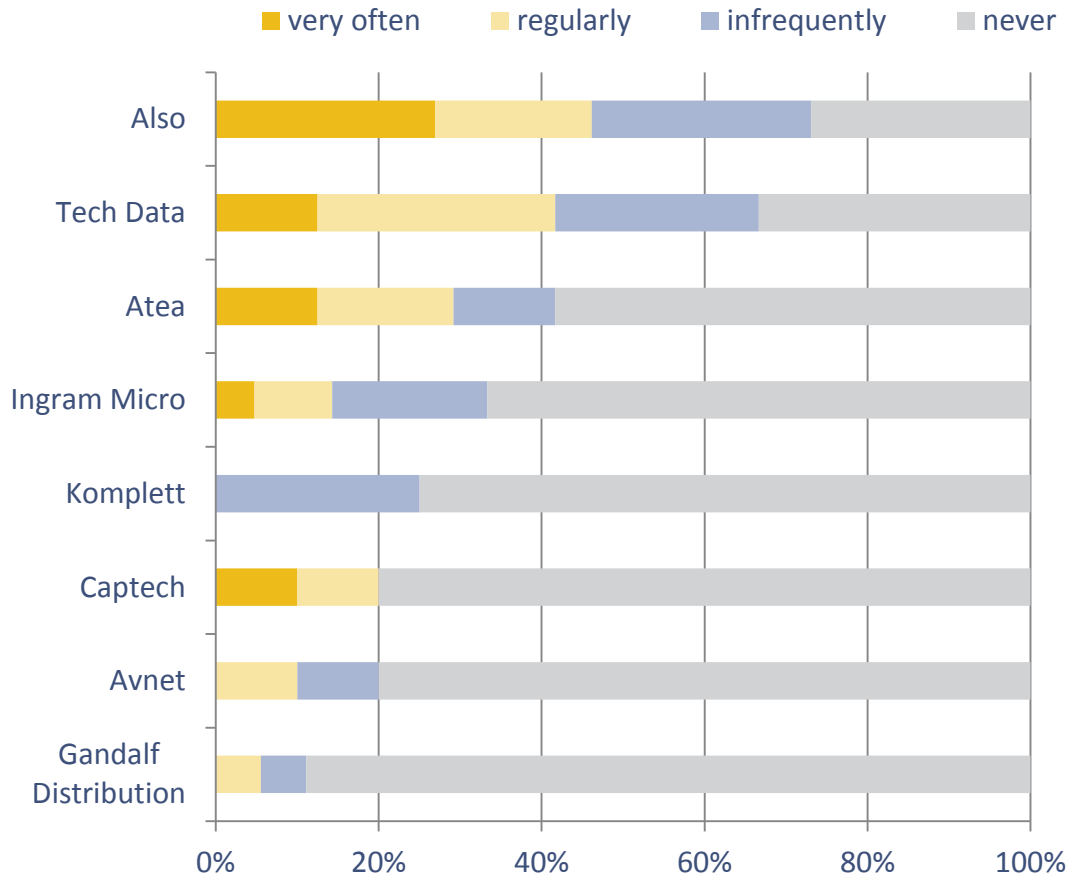


Fig. 4: DBCI Scandinavia November/December 2015 “Ranking distributors”, n=21 (mean value)

- The two market leaders among the distributors in Scandinavia are Also and Tech Data. Between 60% and 75% of all polled companies work with these distributors.
- In short succession follow Atea and Ingram Micro. Between 35% and 40% of the market participants have worked with those competitors.
- In many countries or regions a local champion plays an important role in the market for distributors. In Scandinavia it is Atea, in France it is SIDEV and in Switzerland MobilePro.
- Most IT distributors offer Digital Signage related services. The market participants have noted that DS projects offer a good possibility to generate additional revenues to the standard box-moving business.



## Further research | DooH is growing healthy and increasing in relevance

**Question:** Please rate the degree of capacity utilization of your DooH network(s) with advertising bookings in 2015 compared to 2014 (including the expected bookings until the end of the current year)?

- Over 48% of polled companies currently doing business in the Digital out of Home market have seen a rise in advertising bookings in the current year. The overall market is expected to register a healthy increase in the total number of bookings for 2015.
- 52% of the market has registered no change in the number of advertising bookings in the year-on-year trend in 2015 compared to 2014. None of the polled companies expect a decline.
- In general DooH is starting to play a more and more important part in the media landscape. DooH is accounting for the most dynamic segment in the traditional ooH advertising branch. Primarily through the digitalisation of media assets has the industry been able to compete with the development in the new media landscape.

### YoY bookings of DooH Networks 2014/15

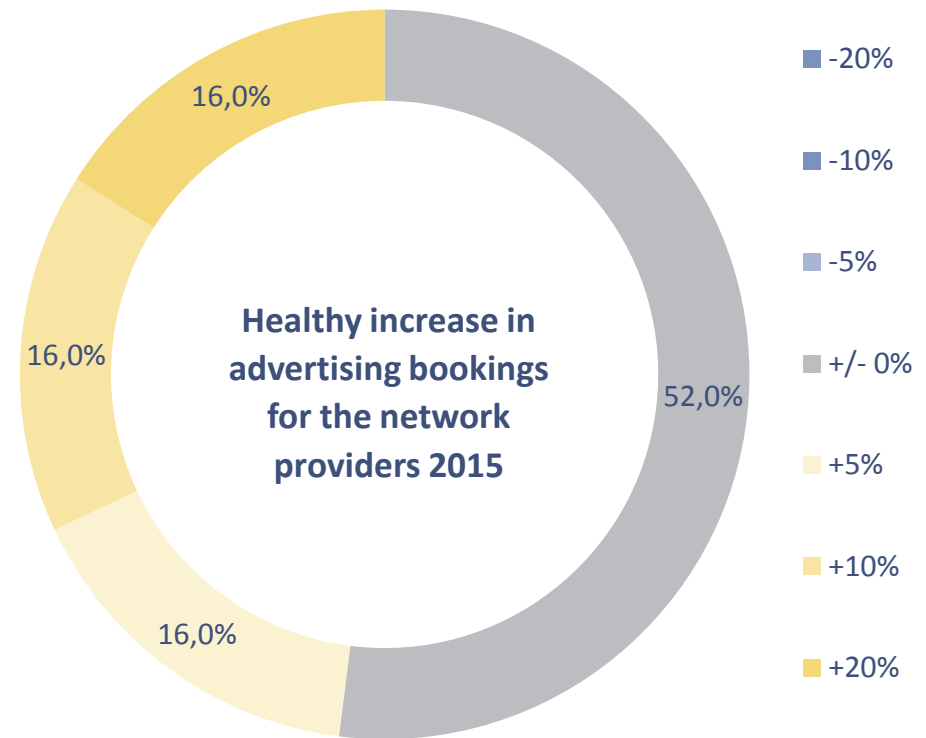


Fig. 5: DBCI Scandinavia November | December 2015 "capacity utilization 2014/15", n=25



## DBCI | Roadmap 2015 & Contact

2016	
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 2-3 of 2016
- The next planned publication date will be the 1<sup>st</sup> of February 2016
- 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 2016. For further information please contact Daniel Russell.

### Contact

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