

GCC

January | February 2016

DBCI



Digital Signage & DoOH
Business Climate Index

The pulse of the Digital Signage
and DoOH industry



invidis
CONSULTING

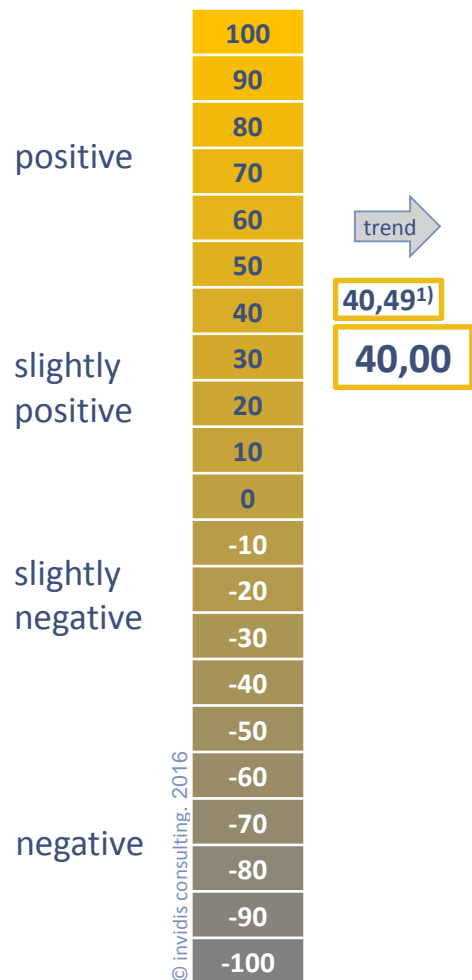
invidis research
2016 GCC 100



DBCI GCC - Introduction

- The OVAB Europe **D**igital **S**ignage **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 Integrated Systems Europe (ISE) and now also covers the Middle East region.
- Questions:
 - Current business situation: “good”, “satisfactory” or “poor”
 - Expectations for the next six months: “more favourable”, “unchanged” or “more unfavourable”
- **GCC** – January/February 2016:
 - The GCC region (Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, United Arab Emirates) is one of the Top 10 markets in the EMEA region for Digital Signage (in units of public displays), with a +30% YoY dynamic development across the region
 - DBCI GCC: **40,00** base points
 - **Over 90% of the polled companies** rate their current business situation as **good or satisfactory**
 - **60%** of the polled companies record a **positive outlook** for their business for the next six months

Index | Digital Signage industry with positive business sentiment



- The Digital Signage Business Climate Index GCC has been surveyed for the second time in the GCC region. The index has only changed marginally by 0, 49 base points and stands at 40,00 base points for the January/February edition of the DBCI survey.
- The current business situation is rated mostly positive by the polled companies. Over 90% have answered that they are satisfied or better with the situation.
- The positive outlook of the DBCI is slightly more conservative as in the previous survey. Still 60% positive expectations reflect the good business sentiment of the Digital Signage and Digital-out-of-Home industry in the region.
- Yet overall the mood in the industry is not too buoyant. The low oil price has put pressure on the budgets of government and companies as well. Therefore many projects are being delayed, put on hold or downgraded since the third quarter of 2015.
- As this scenario is expected to remain for the upcoming future, government financed projects will become more challenging. However, in midterm robust growth in the non-oil sector and major events like Expo 2020 or FIFA Worldcup 2022 drive demand for digital signage.
- Good growth is expected to come from the retail and hospitality sectors. Also infrastructure projects for the upcoming events will produce increasing demand for transportation solutions

Survey facts

- Participants: n=35
- Region: GCC region (Bahrain, Iran, Kuwait, Oman, Qatar, Saudi Arabia, United Arab Emirates)
- Time frame: 2016 calendar weeks 2-3

Fig. 1: DBCI GCC November/December 2016 n=35; 1) DBCI November/December 2015



Status Quo | Very positive current business situation

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

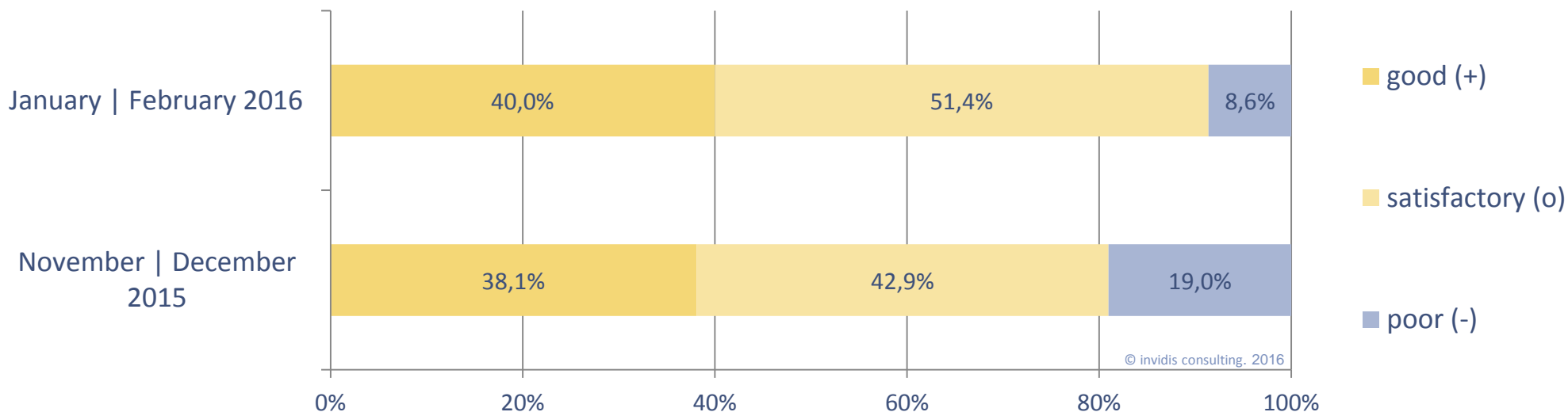


Fig. 2: DBCI GCC January | February 2016 "business situation", n=35



Expectations | Good outlook for the next six months

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

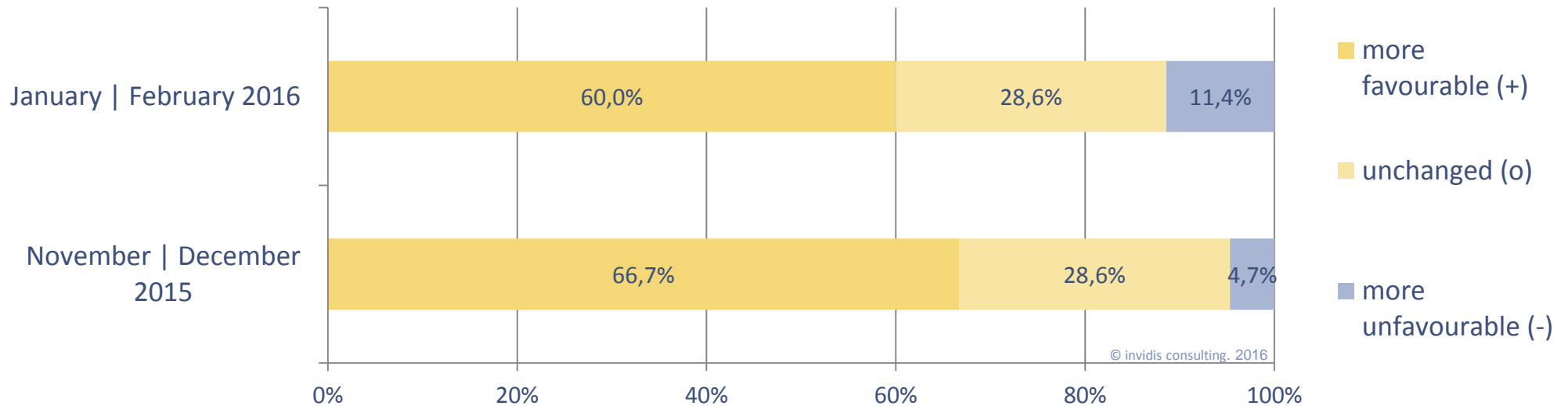


Fig. 3: DBCI GCC January | February 2016 "business expectations", n=35

Hirings 2015 | Digital Signage creates many new jobs

- **54,6%** of all companies in the Digital Signage Market have hired new staff in the last year.
- In 2015 **up to 100 new jobs** were created in the Digital Signage market in the GCC region.
- Now this unbroken positive trend in the IT industry overall has developed in a definite shortage of qualified personal. Companies are more and more concerned, how they can match recruiting with their growth strategy.
- As a whole there is a high demand for qualified personnel. Due to the digital transformation and the increasing integration of digital technologies the demand for personnel on a management level with new qualifications is very high (e.g. key account and project manager).
- The increasing expansion in vertical markets leads to a demand for more professionals from different industry branches by Digital Signage companies.

Company growth in new jobs created 2015

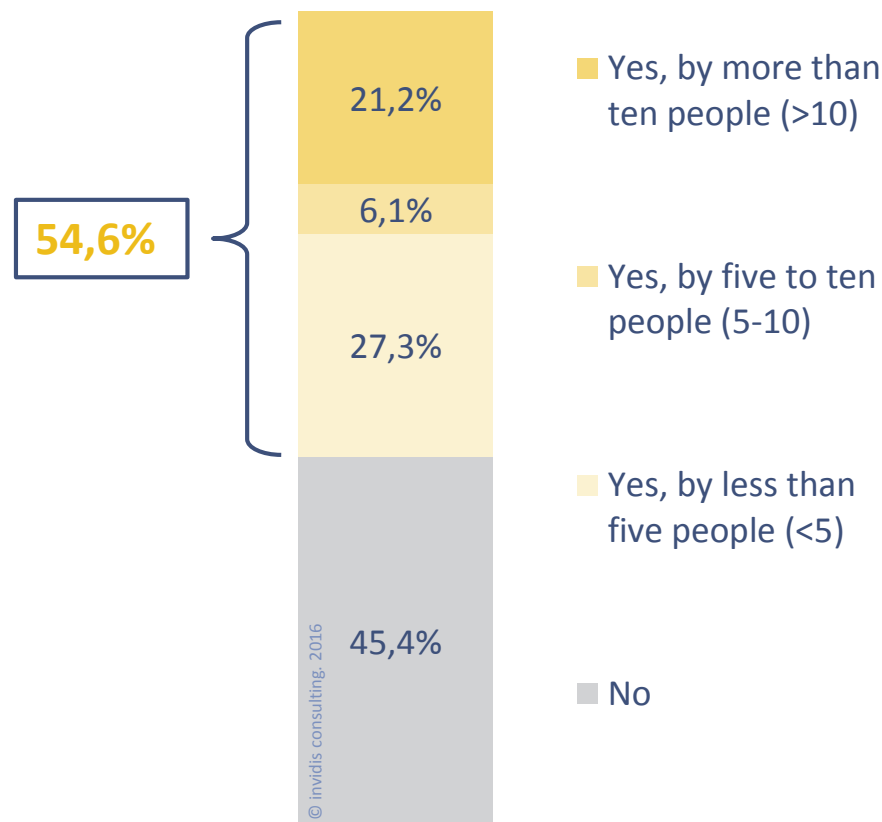


Fig. 4: DBCI GCC January/February 2016 "Hirings 2015", n=33

DBCI | Roadmap 2016 & Contact

2016	
January	
February	
March	← DBCI Mar./Apr. WN14
April	
May	← DBCI May./Jun. WN22
June	
July	← DBCI Jul./Aug. WN31
August	
September	← DBCI Sep./Oct. WN40
October	
November	← DBCI Nov./Dec. WN49
December	

- The next survey will take place in calendar week 12-11
- The next planned publication will be in week 14
- 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

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DSS | The Digital Signage Summit series

**DIGITAL SIGNAGE
SUMMIT @ISE**

- «Digital Signage Summit» new brand for event series

- ❖ DSS Europe: 23-24 June 2016
- ❖ DSS MENA: 19-20 Sep 2016
- ❖ DSS Russia: 1-2 Nov 2016


**DIGITAL SIGNAGE
SUMMIT EUROPE**

- DSS is a dedicated confex event platform - conference and exhibition - featuring digital signage and Dooh topics

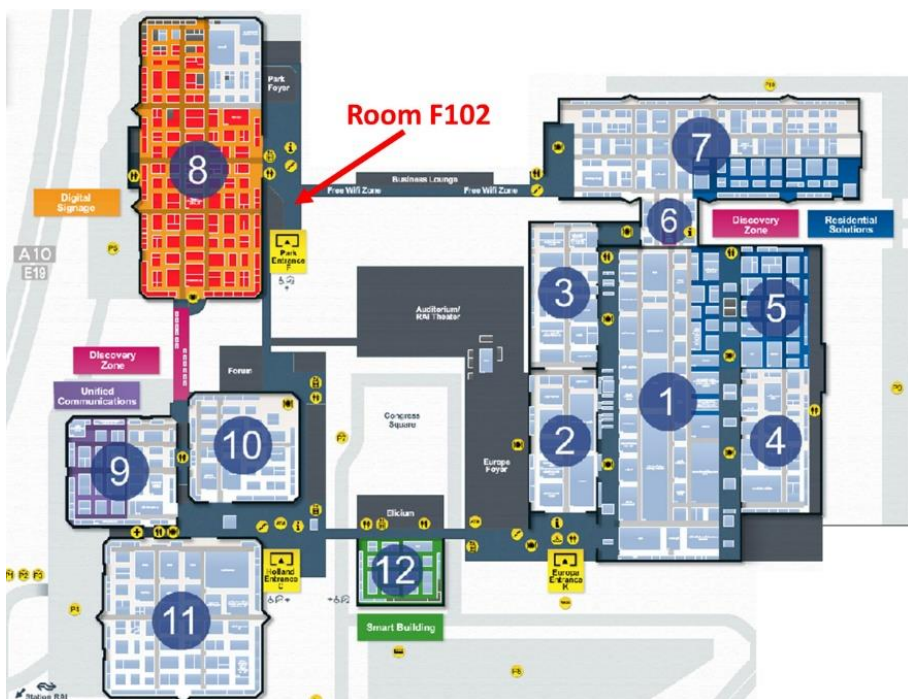

**DIGITAL SIGNAGE
SUMMIT RUSSIA**

- Each event features visionary and best practise presentations as well as panel discussions concerning the most recent state of the art projects, trends and drivers of the industry


**DIGITAL SIGNAGE
SUMMIT MENA**

- All events also have a dedicated exhibition space for product presentation and networking opportunities

DSS | Digital Signage Summit Kick-off Sessions @ ISE 2016



- Together with the ISE and in cooperation with Digital Signage Summit Europe, invidis consulting will be present at Integrated Systems Europe 2016 (9 – 12 February 2016, Amsterdam) with several digital signage events.
- **ISE 2016 Presentations invidis consulting**
Every Day at 12:00, Commercial Theatre Hall 8
- **Digital Signage Summit Market Briefings**
Every Day at 14:00, Room F102
- **Digital Signage Summit Guided Tours**
Every Day at 14:30, Room F102
- **More here:**
invidis.de/ise-2016-digital-signage-ise-program/