

Scandinavia
March | April 2016

DBCI

The pulse of the Digital Signage
and DooH industry



Digital Signage & DooH
Business Climate Index



**DIGITAL SIGNAGE
SUMMIT EUROPE**

23-24 June 2016, Munich, Germany



invidis research
2016 SK 200



Digital Signage market sentiment sees correction in the first quarter 2016



Fig. 1: DBCI Scandinavia March | April 2016 "Index" n=17

- The digital Signage Business Climate Index Scandinavia has decreased since the last survey in January 2016. The index fell by 11,25 base points from 58,30 points to 47,05 base points.
- The current business situation is slightly more positive compared to the previous survey. All market participants are satisfied or even in a good mood.
- At the same time the optimism towards the near future has seen a clear decline since February. Now only less than 50% of all polled companies expect a *more favourable* situation for their products and services in the Digital Signage and DooH market within the next six months.
- Overall the Digital Signage industry has started well into the new year. The first quarter of 2016 saw an increase in customer demand, but not as much tenders on the market as expected.

previous survey

change
DBCI 2016 #1

-19,3%

Participants: n=17; region: Denmark, Sweden, Norway, Finland & Iceland; time frame: 2016 calendar weeks 12-13



Increased current business situation & conservative outlook

Current business Situation | Scandinavia | March/April 2016

Expectations | Scandinavia | March/April 2016

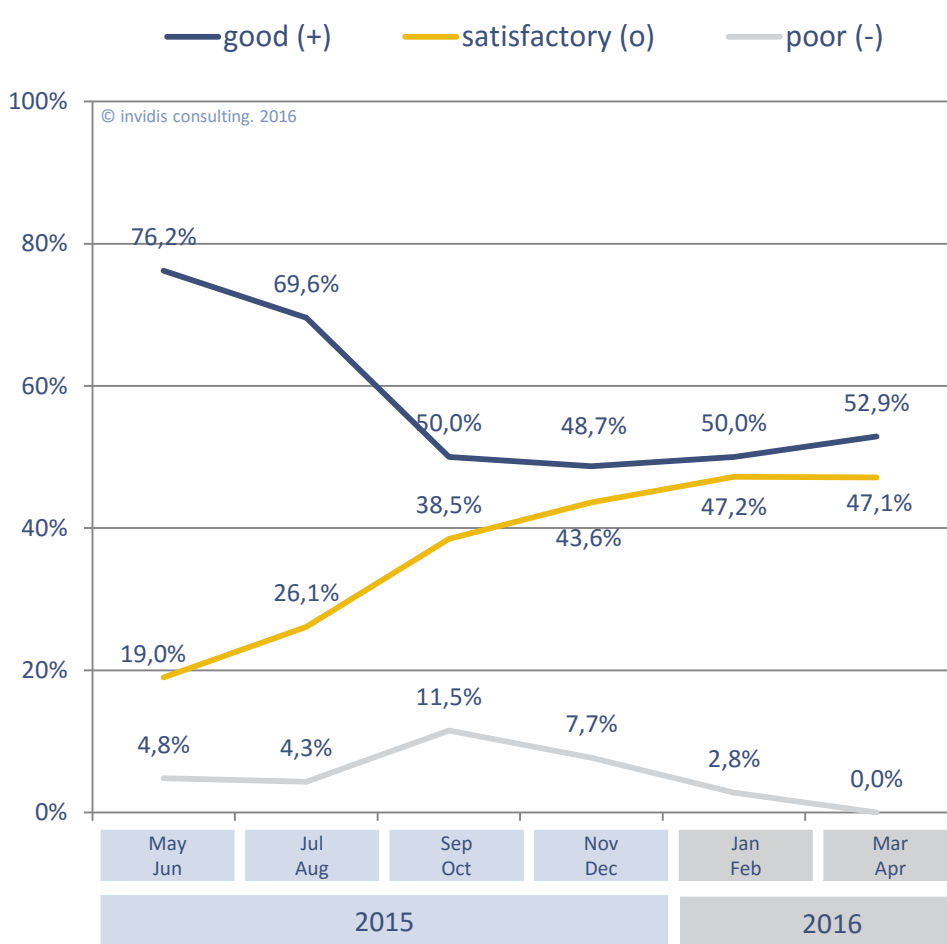


Fig. 2: DBCI Scandinavia March | April 2016 „Business Situation“, n=17

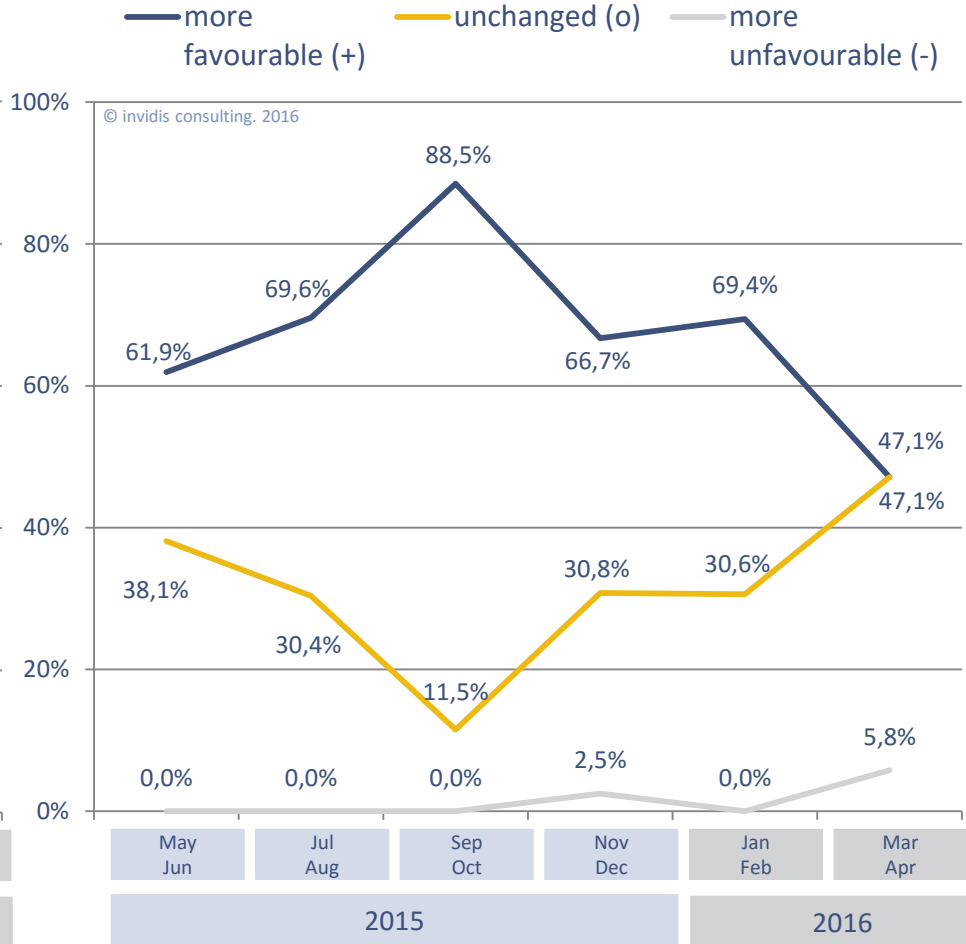


Fig. 3: DBCI Scandinavia March | April 2016 „Expectations“, n=17



Corp. Comm. takes top spot, strong demand for Retail & Transportation

Question: We would like to assess the dynamic for Digital Signage in the different vertical markets. In which vertical markets has your company realised the most projects in 2015? Please rate the Top 3 vertical markets.

- Corporate Communication is with approximately one third of all Digital Signage revenues the biggest vertical market and has grown exponentially over the last few years. The digitization of employee communications is now seen as a sustainable investment by many companies.
- The Retail vertical market has taken a step back. However it still is responsible for one fourth of all revenues. Customer engagement, marketing and ambient installations become more and more common not only in most high-street retailers, but also in small and medium businesses.
- The transportation vertical market has shown the highest dynamic over the last year. Particularly municipal transportation networks have seen strong investments in buses, trams and railways.

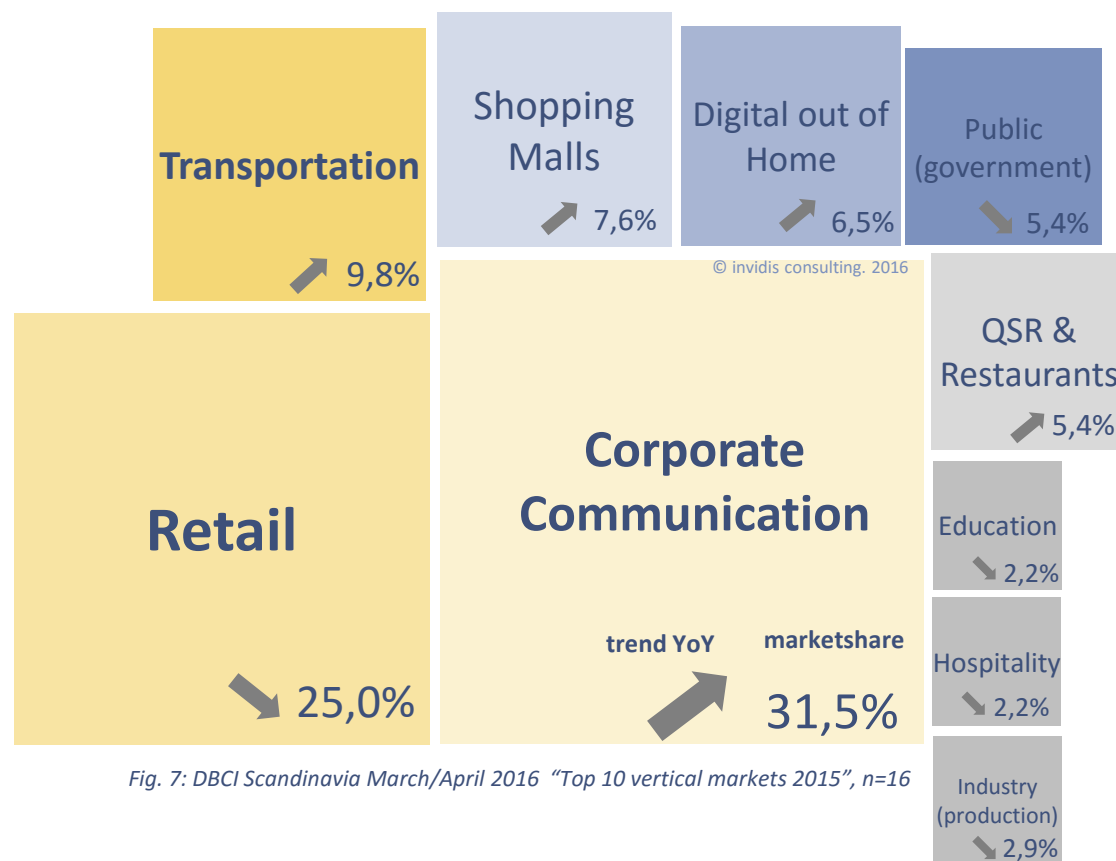


Fig. 7: DBCI Scandinavia March/April 2016 "Top 10 vertical markets 2015", n=16



New installations and network expansion will drive DooH

Question: Which factors will primarily lead to an increasing market share of DooH?

- The main driver for DooH in the future will be the installation of new networks. 50% of all DooH market participants expect this development to give the industry the most positive impulse in the next years. In spite of the already high penetration of DooH in Scandinavia, the industry still sees potential in previously undeveloped location.
- The market participants also expect an increasing expansion of existing networks. Here investments are increasingly shifted from installing new locations or displays to upgrading the existing technology (hardware / software)
- Only cross-media bundling for dynamic campaigns i.e. online video has not yet fully arrived. Contrary to the German speaking region, this seems to be yet a slow moving trend.

Reasons for future DooH growth

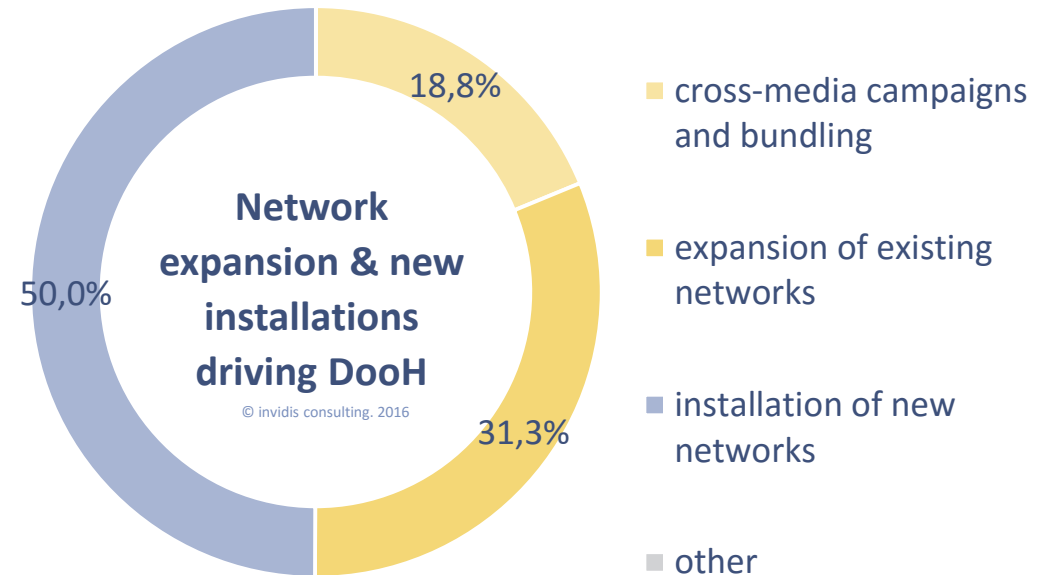


Fig. 8: DBCI Scandinavia March | April 2016 "growth reasons DooH", n=16



Roadmap 2016 & Contact

2016
January
February
March
April
May
June
July
August
September
October
November
December

← DBCI May./Jun. | WN23

← DBCI Jul./Aug. | WN32

← DBCI Sep./Oct. | WN41

← DBCI Nov./Dec. | WN50

OVAB Europe will be rebranded as Digital Signage Federation Europe starting with the 1st April 2016

- The next survey will take place in calendar weeks 20-21
- The next planned publication date will be in week 23
- 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.

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DSS | The Digital Signage Summit series

- «Digital Signage Summit» new brand for event series
- DSS is a dedicated confex event platform - conference and exhibition - featuring digital signage and DooH topics
- 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
- All events also have a dedicated exhibition space for product presentation and networking opportunities

