

Scandinavia

May | June 2016

**DBCI**

The pulse of the Digital Signage  
and DooH industry



Digital Signage & DooH  
Business Climate Index



**DIGITAL SIGNAGE  
SUMMIT @ISE**



invidis research  
2016 SK 300



# Digital Signage market sentiment back on a positive trend in May

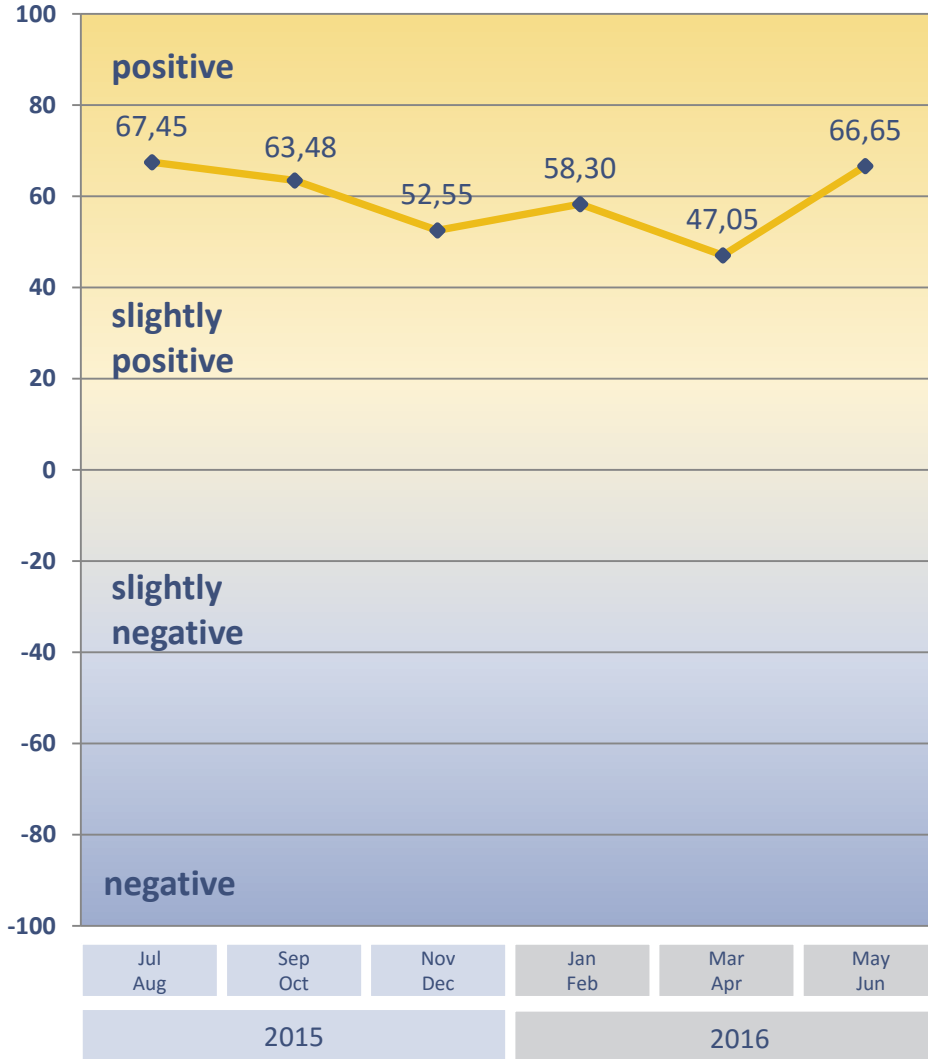


Fig. 1: DBCI Scandinavia May | June 2016 "Index" n=15

- The digital Signage Business Climate Index Scandinavia has increased since the last survey in March 2016. The index grew by 19,60 base points from 47,05 points to 66,65 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 increase since March. Now more than 70% 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.
- The conservative mood in the IT economy in the second quarter was rather exaggerated. Most companies have realised that business is more dynamic as expected.

	<i>previous survey</i>	<i>previous survey</i>
<b>change</b>		
<b>DBCI 2016 #3</b>	+/-0,0%	<b>+41,7%</b>

Participants: n=15; region: Denmark, Sweden, Norway, Finland & Iceland; time frame: 2016 calendar weeks 18-19



# Increased current business situation & very optimistic outlook

Current business Situation | Scandinavia | May/June 2016

Expectations | Scandinavia | May/June 2016

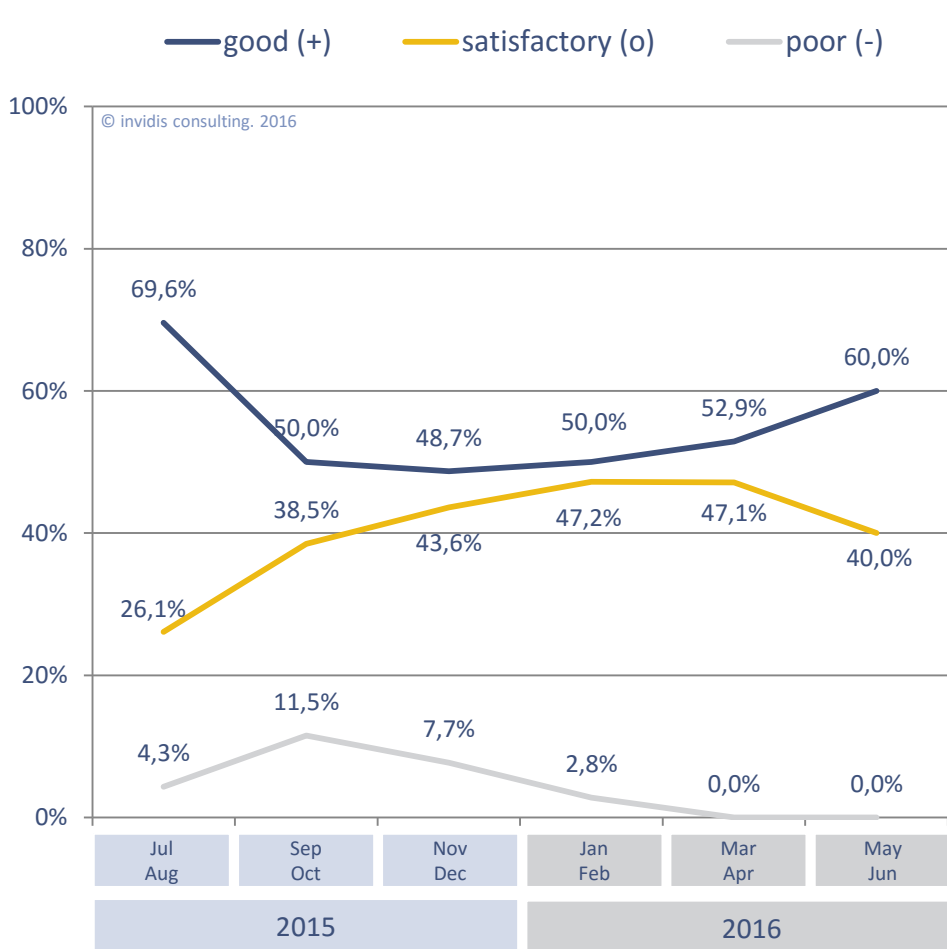


Fig. 2: DBCI Scandinavia May | June 2016 „Business Situation“, n=15

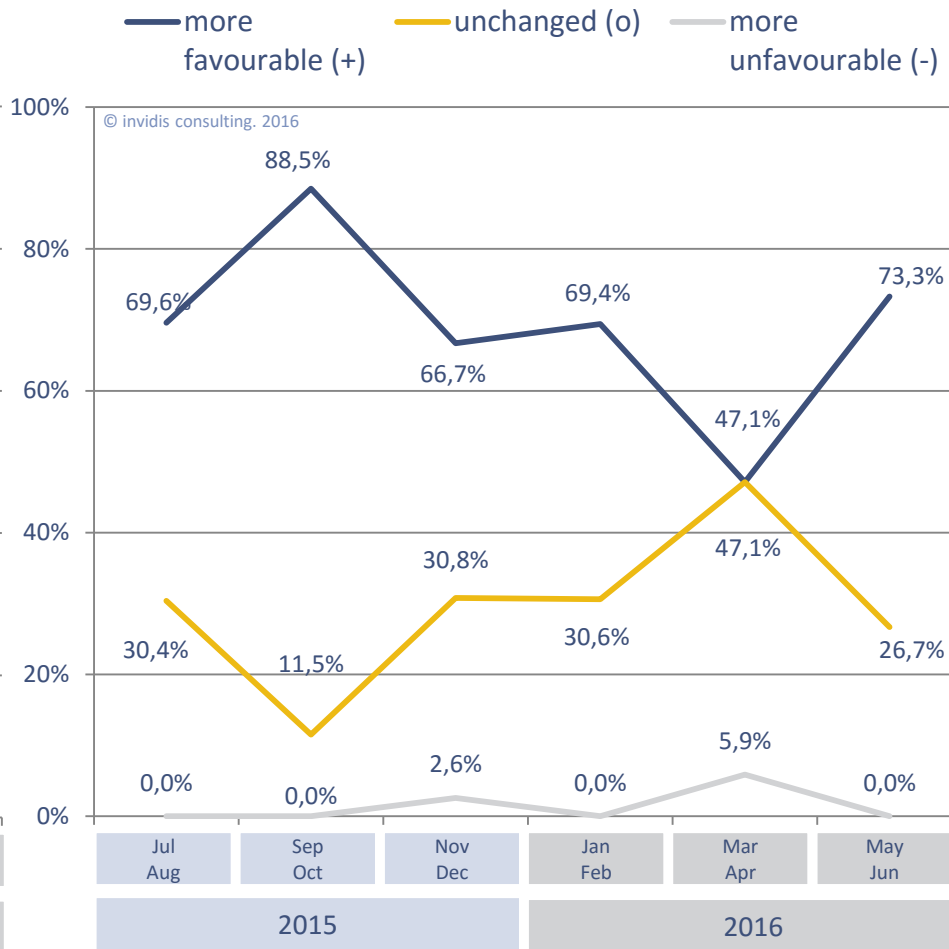


Fig. 3: DBCI Scandinavia May | June 2016 „Expectations“, n=15



# Windows in first, Linux challenges & Android picks up speed

**Question:** How high was the percentage of operating systems used in Digital Signage Projects in 2015?

Windows is implemented most frequently with Digital Signage projects. However other operating systems have significantly gained ground in the last two years.

Particularly Linux based installations are becoming more and more popular. Here cost and security issues are dictating the decisions. With Digital Signage installations becoming more varied in size and required performance, the appliances running on a non-PC architecture like Raspberry Pi, Cisco, BrightSign, Spinetix etc. are more widely integrated.

Cost effective systems operating on Android or SoC basis currently have the highest dynamic in the market. Still many security and performance issues remain.

Apple operating systems could establish a robust nice segment. However, many managers with IT responsibility dismiss it as an operating system for Digital Signage installations.

Market share of IT operating systems in Digital Signage installations 2015

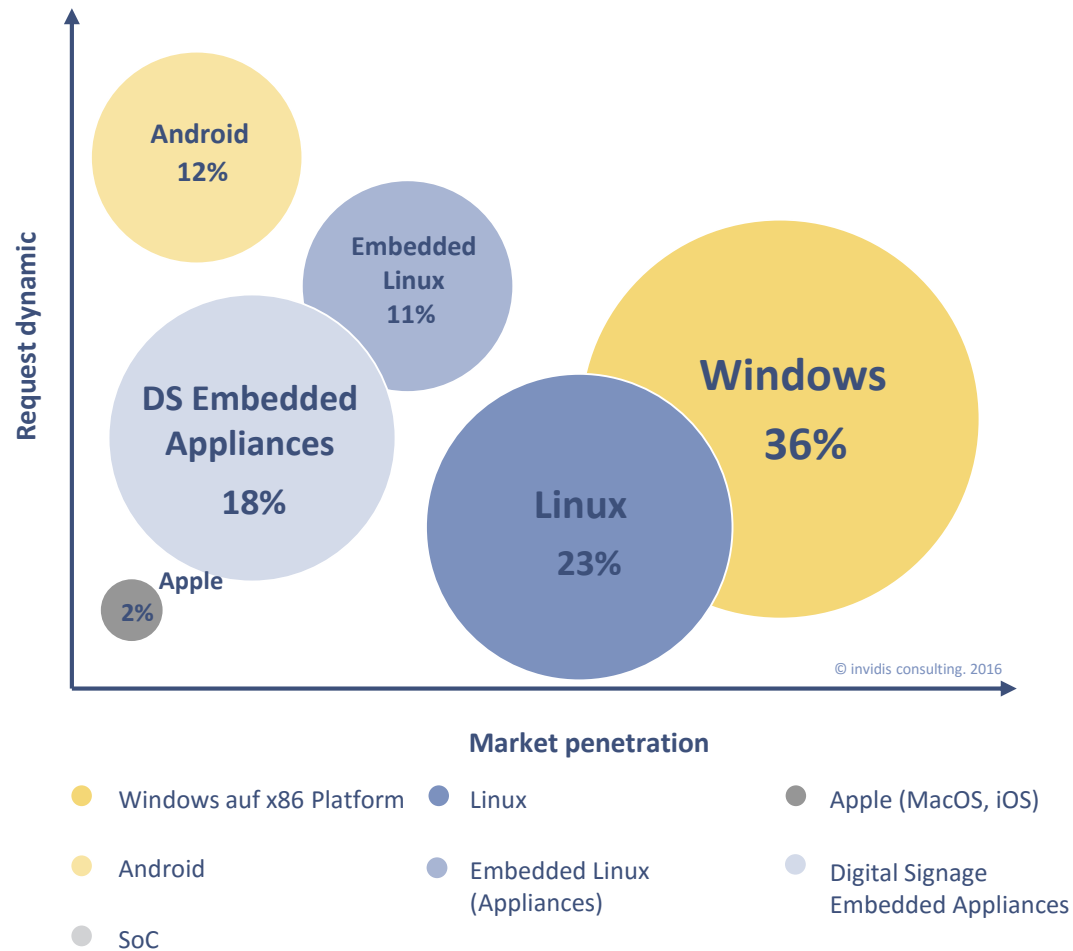


Fig. 4: DBCI Scandinavia May | June 2016 "operating systems 2015", n=12



# Roadmap 2016 & Contact

<b>2016</b>
January
February
March
April
May
June
July
August
September
October
November
December

← **DBCI Jul./Aug. | WN32**

← **DBCI Sep./Oct. | WN41**

← **DBCI Nov./Dec. | WN50**

## OVAB Europe was rebranded as **Digital Signage Federation Europe** starting with the 1<sup>st</sup> April 2016

- The next survey will take place in calendar weeks 28-29
- The next planned publication date will be in week 32
- 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

