

GCC

May | June 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 GCC 300

Robust business sentiment in the Digital Signage market in May



- The Digital Signage Business Climate Index has declined since the last survey in March with a nominal decrease by 16,69 base points from 49,99 points to 33,30 base points.
- Contrary to the index trend the current business situation is rated increasingly positive by the market participants - with negative ratings dropping off.
- However the optimism for the near future has declined drastically. The negative expectations and the conservative expectations have increased and now only half of the market expects further demand growth for their products and services within the next six months.
- After the difficult year 2015 all economic short term developments in the GCC region remain on a low level. Only in 2017 the industry is expected to pick up speed again.
- Most Digital Signage solutions have been reliant on Windows as OS in 2015. However Linux based solutions are increasingly implemented

change **DBCI 2016 #3** *previous survey* **-33,4%**

Participants: n=18; Region: FR; Survey Period: 2016 calendar weeks 19-20

Fig. 1: DBCI GCC May | June 2016, n=18

Good current business situation, but markedly more conservative outlook

Current business Situation | France | May/June 2016

Expectations | France | May/June 2016

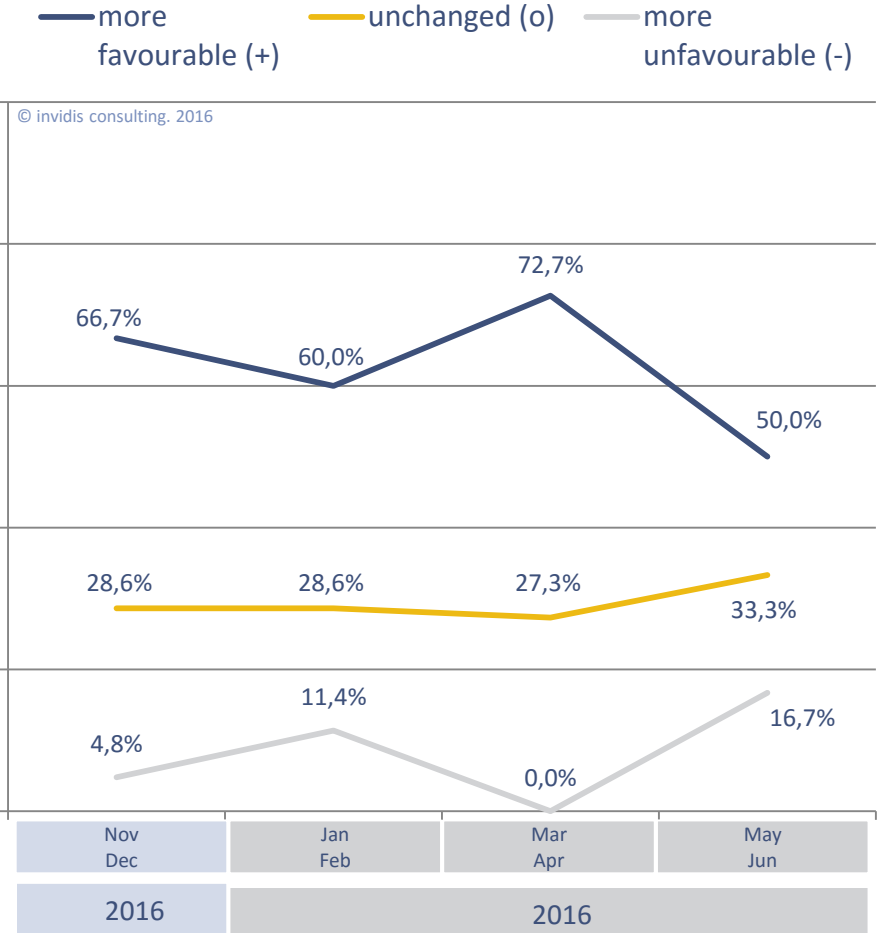
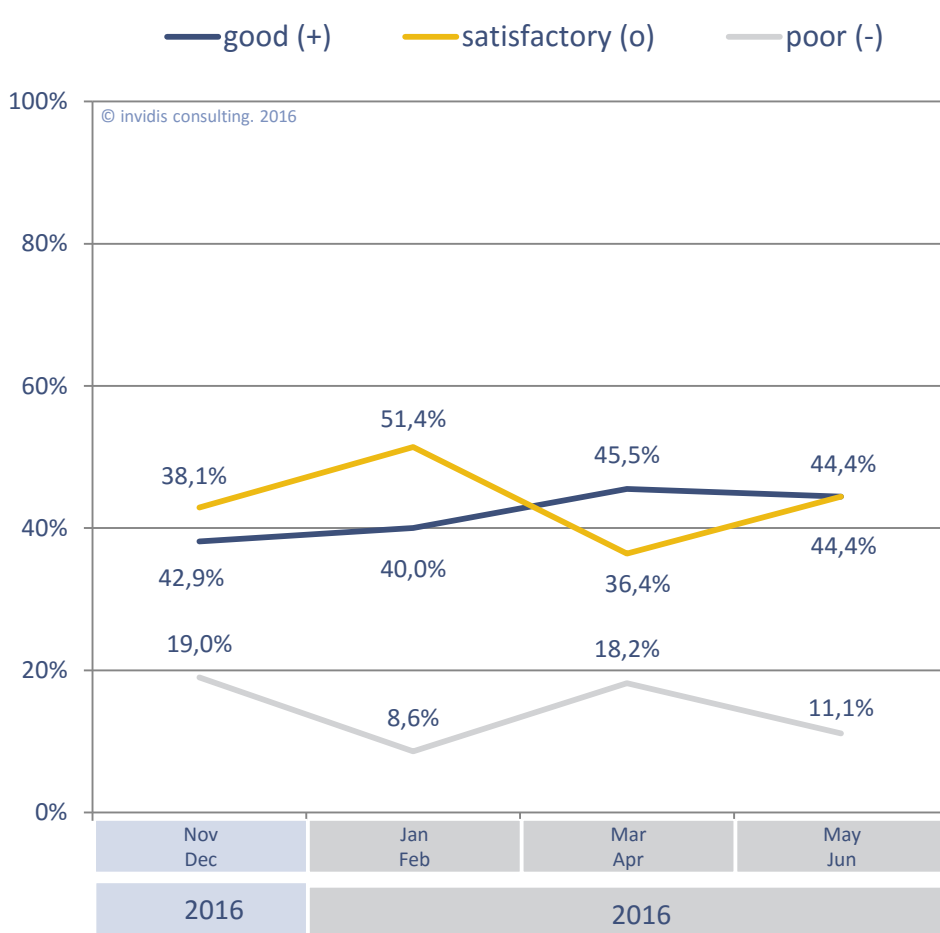


Fig. 2: DBCI GCC May | June 2016 „Business Situation“, n=21

Fig. 3: DBCI GCC May | June 2016 „Expectations“, n=18

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

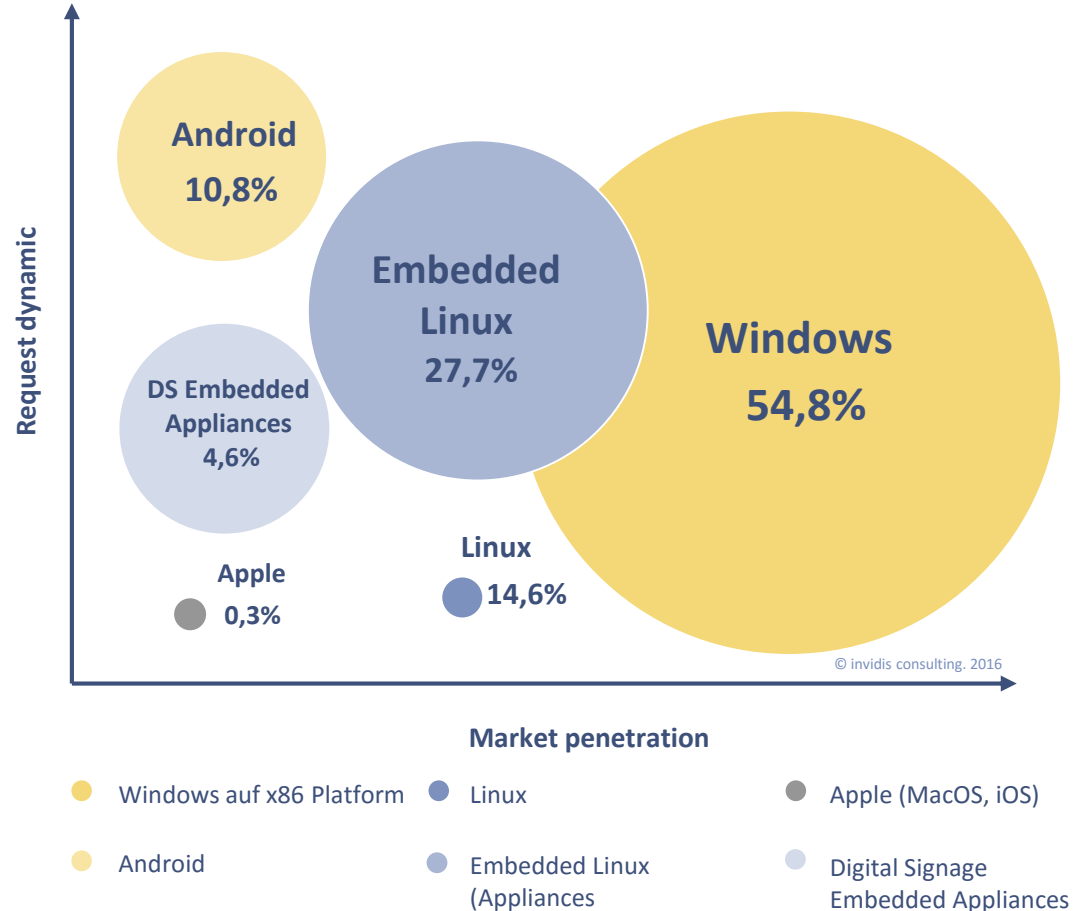


Fig. 4: DBCI GCC May | June 2016 "operating systems 2015", n=16

DBCI | Roadmap 2016 & Contact

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

← DBCI Jul./Aug. | WN31

← DBCI Sep./Oct. | WN40

← DBCI Nov./Dec. | WN49

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

- The next survey will take place in calendar week 29-30
- The next planned publication will be in week 31
- 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

