Scandinavia

July | August 2016

DBCI

Digital Signage & DooH Business Climate Index

DIGITAL SIGNAGE FEDERATION

The pulse of the Digital Signage and DooH industry

invidis CONSULTING

DIGITAL SIGNAGE SUMMIT

invidis research
2016 SK 400

Volatile Digital Signage business sentiment continues throughout the summer

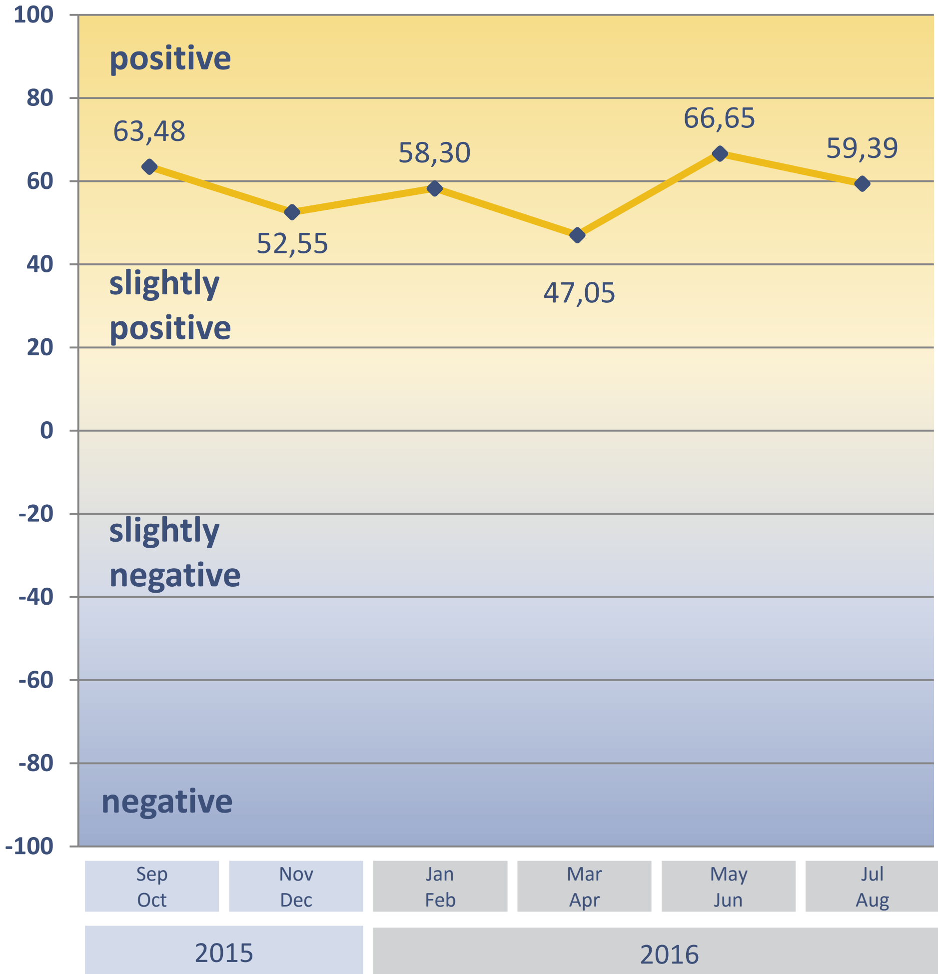


Fig. 1: DBCI Scandinavia July | August 2016 "Index" n=16

Participants: n=16; region: Denmark, Sweden, Norway, Finland & Iceland; time frame: 2016 calendar weeks 28-29

- Since the last survey in May the Digital Signage Business Climate Index in the Scandinavia has decreased by 7,26 base points from 66,65 base points to 59,39 base points. In total the Index is down by 11,9% year-on-year and by 10,9% compared to the previous survey.
- The negative assessment of the current business situation for products and services in the Digital Signage and Digital-out-of-Home industry has grown, dominates the index and is responsible for the overall negative trend. However, the outlook towards the near future has again increased very strongly. Over 80% of the market participants expect the business climate to be more favourable within six months.

Further Research

- Over 60% of the polled companies in the Scandinavia expect growing revenues in 2016. Still 12% of the market participants had to accept a decline in revenues in the first two quarters of 2016. However many of those companies are expecting to balance the losses at the end of the year.
- The market is not overly concerned by the prospect of an economic fallout due to the Brexit vote in Great Britain

	previous survey	*previous survey*
change DBCI 2016 #4	**-11,9%**	**-10,9%**

Cautious current business situation & very optimistic outlook

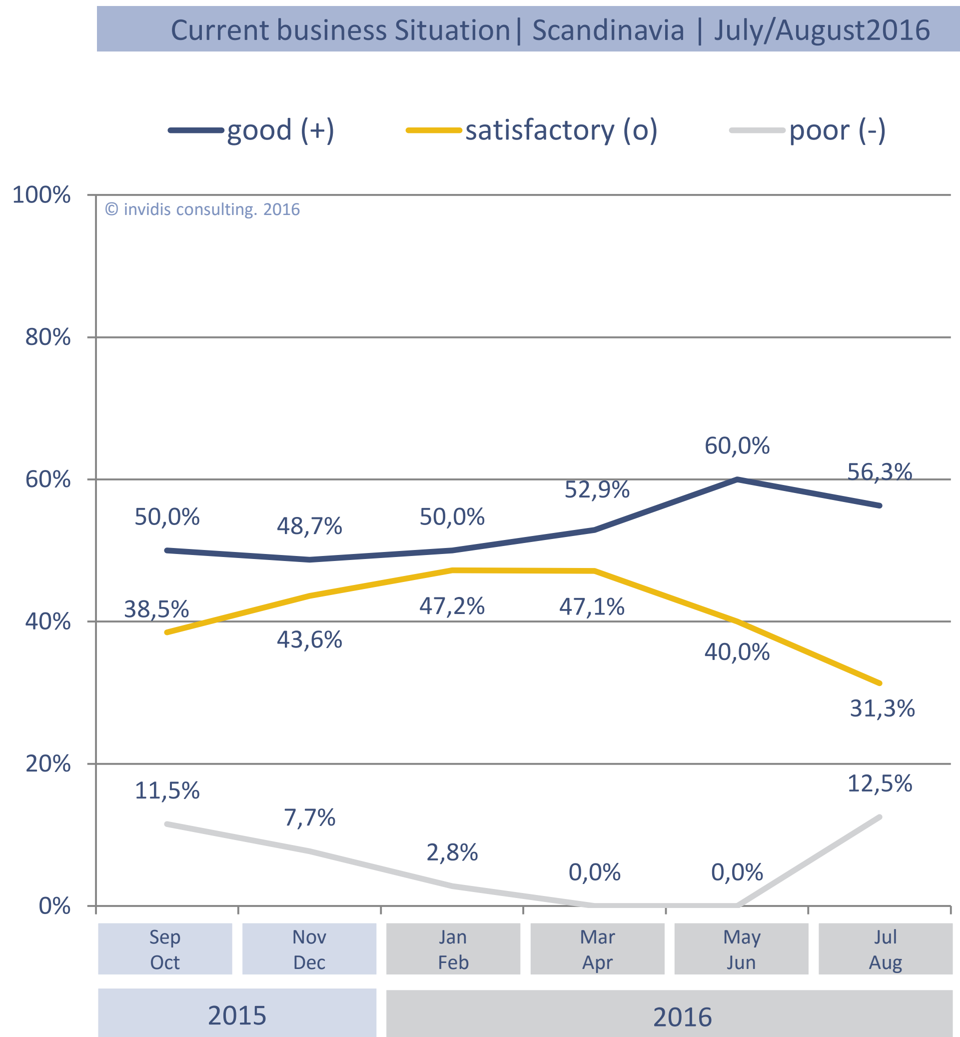


Fig. 2: DBCI Scandinavia July | August 2016 „Business Situation“, n=16

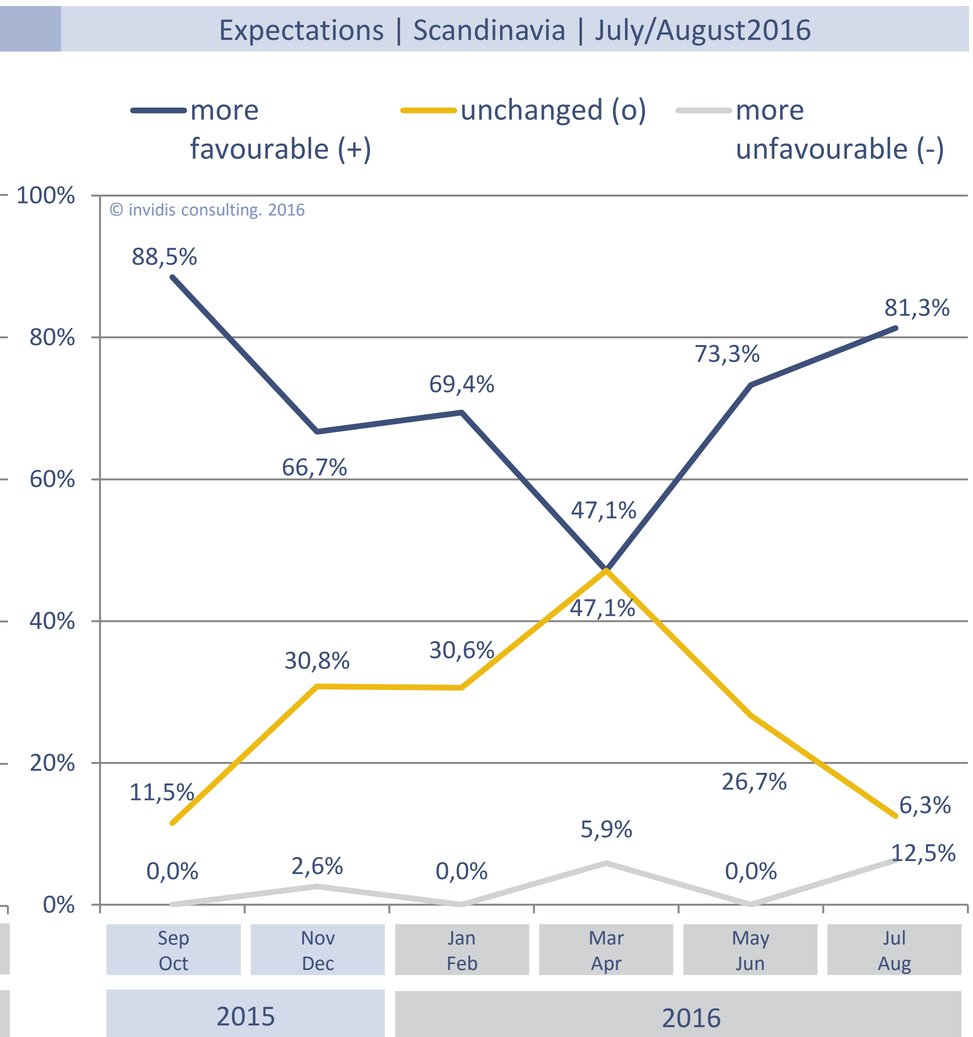


Fig. 3: DBCI Scandinavia July | August 2016 „Expectations“, n=16

First semester 2016 with considerably higher revenues than 2015

"The revenues in the first half year 2016 have … in comparison to the revenues of the same period in the previous year."

62,5% of all polled companies could generate in parts a clear increase in revenues in the first half year term in 2016 compared to the same period in the previous year

Only 12,6% of all polled companies had to accept a decrease in revenues compared to the previous year

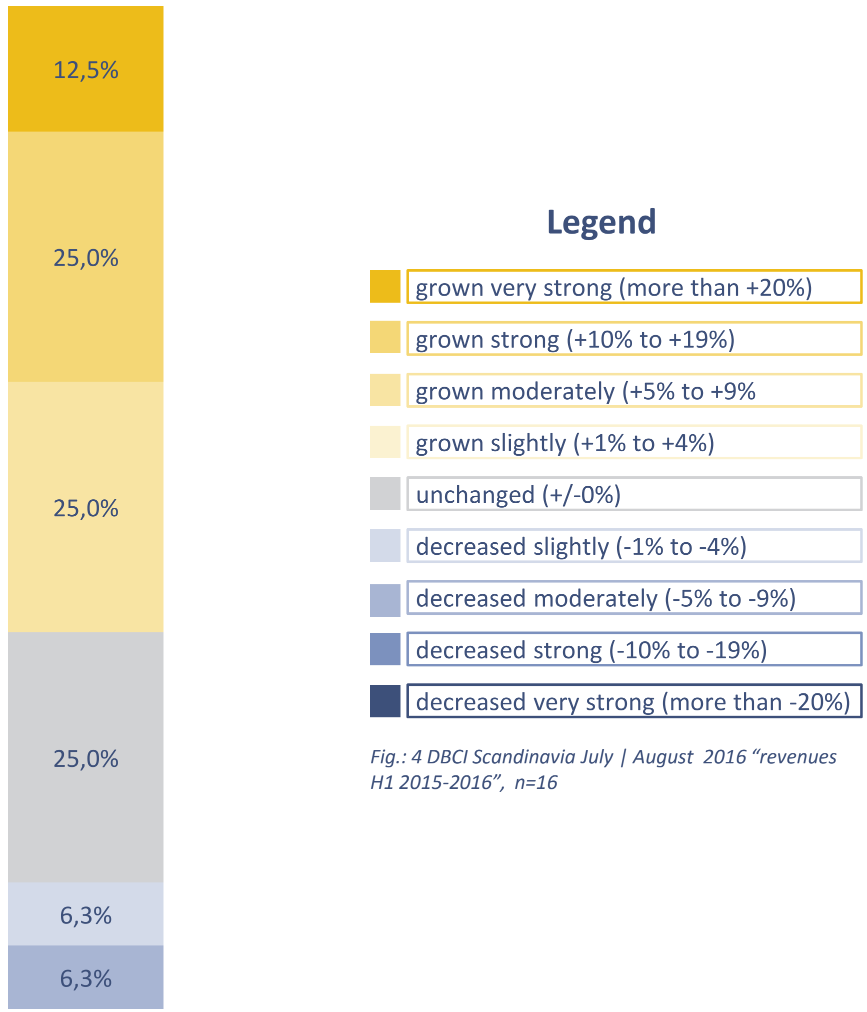


Fig.: 4 DBCI Scandinavia July | August 2016 "revenues H1 2015-2016", n=16

Clear increase in revenues expected for the full year 2016

"The revenues in 2016 will … compared to the revenues in 2015."

81,4% of all polled companies are expecting a healthy growth in revenues for the year 2016 compared with the previous year

Only 6,3% of all polled companies expect a decrease in revenues compared to the pervious year

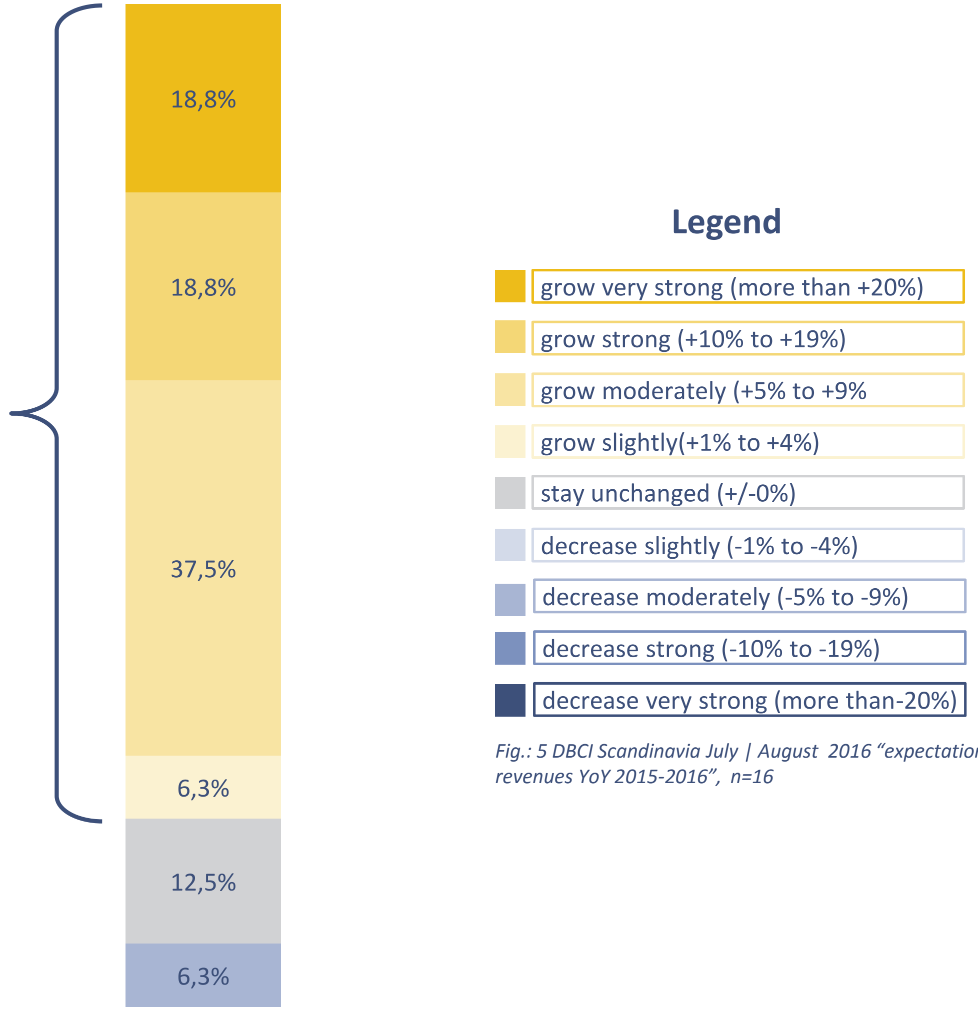
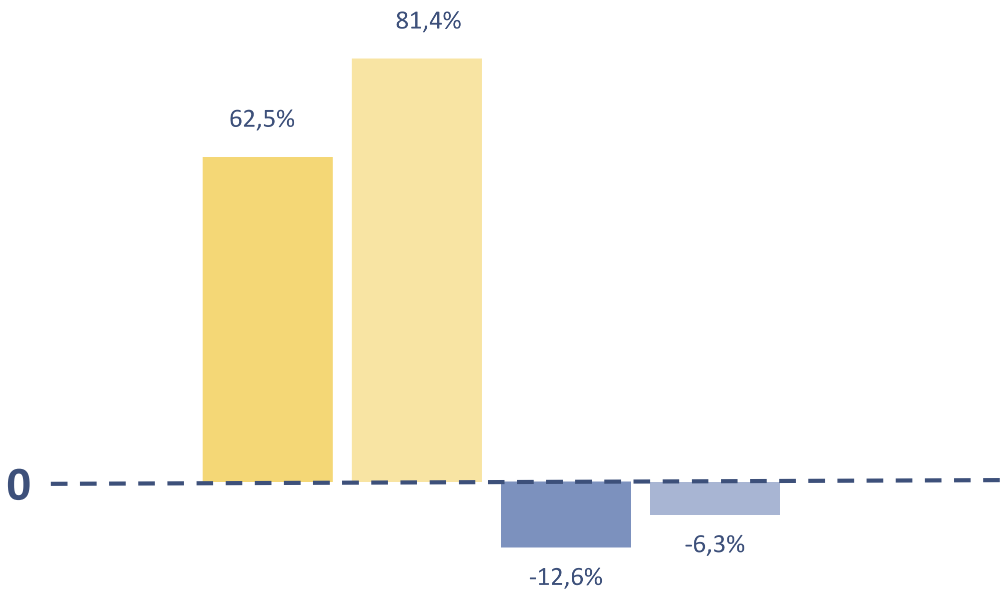


Fig.: 5 DBCI Scandinavia July | August 2016 "expectation revenues YoY 2015-2016", n=16

First semester losses expected to be contained later this year



Percentage of polled companies which have registered a growth respectively a decline in revenues in H1 2016, compared to the same period in the previous year

- YoY H1 2015-2016 growth
- YoY 2015-2016 growth expected
- YoY H1 2015-2016 decrease
- YoY 2015-2016 decrease expected

Fig.: 6 DBCI Scandinavia July | Augsut 2016 "revenues YoY H1 2015-2016 and YoY 2015-2016", n=16

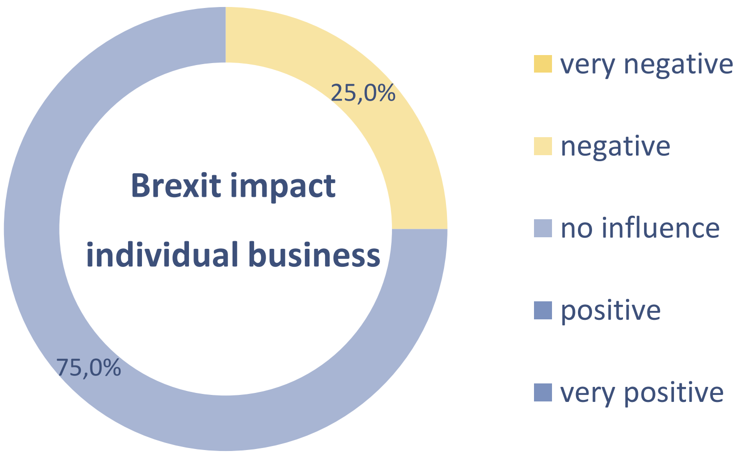
- Over 80% of the polled companies in Scandinavia expect to have a growth in revenues in 2016 compared to 2015
- Still 12% of all polled companies had to accept a decline in revenues in the first six months of 2016. However many of those companies are expecting to balance the losses at the end of the year
- Traditionally the IT business has a relative calm period in the summer, followed by a strong showing towards the end of the year

Brexit vote with only limited influence on Digital Signage market

***Question 1**: How do you expect the Brexit will influence your company/business?*

***Question 2:** How do you expect the Brexit will influence your national Digital Signage and Digital out of Home market?*

- Three quarters of the polled companies are not overly concerned for their business by the prospect of an economic fallout due to the Brexit vote in Great Britain
- The percentage who see no influence is the same for the assessment of impact on the general Digital Signage and Digital-out-of-Home economy in the Scandinavia
- The industry is still very much concentrated on a local or national region. Most companies have no or only loose business interests in Great Britain.
- Market participants who expect a negative influence are either dependent on exchange rates because of their purchasing policy or have customers respectively close business ties on the islands.



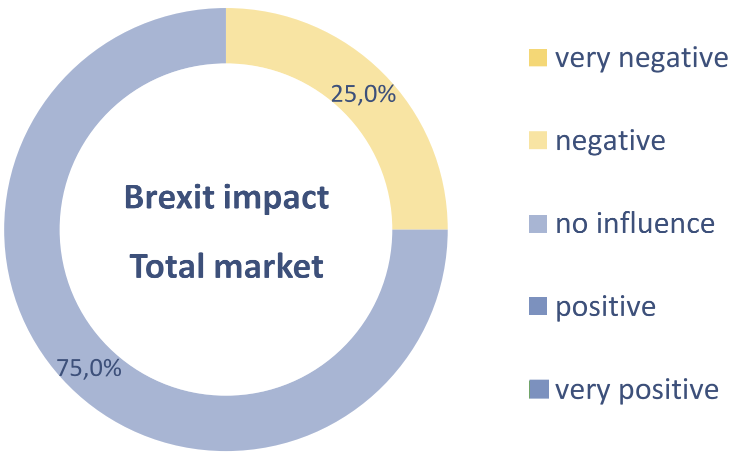


Fig. 7: DBCI Scandinavia July | August 2016 "Brexit", n=16

Roadmap 2016 & Contact

2016	
January	
February	
March	
April	
May	
June	
July	
August	
September	**DBCI Sep./Oct. | WN41**
October	
November	**DBCI Nov./Dec. | WN50**
December	

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

- The next survey will take place in calendar weeks 37-38
- The next planned publication date will be in week 41
- The DBCI is polled by invidis consulting and published in cooperation with DSF 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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The Digital Signage Summit series – DSS

DIGITAL SIGNAGE SUMMIT
THE LEADING DIGITAL SIGNAGE AND DIGITAL OUT OF HOME STRATEGY CONFERENCE 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

A JOINT VENTURE BETWEEN: Integrated Systems Events invidis