GCC

July | August 2016

DBCI

The pulse of the Digital Signage and DooH industry

DIGITAL SIGNAGE FEDERATION

Digital Signage & DooH Business Climate Index

invidis CONSULTING

DIGITAL SIGNAGE SUMMIT

invidis research
2016 GCC 400

Very cautious business sentiment prevails in the Digital Signage market

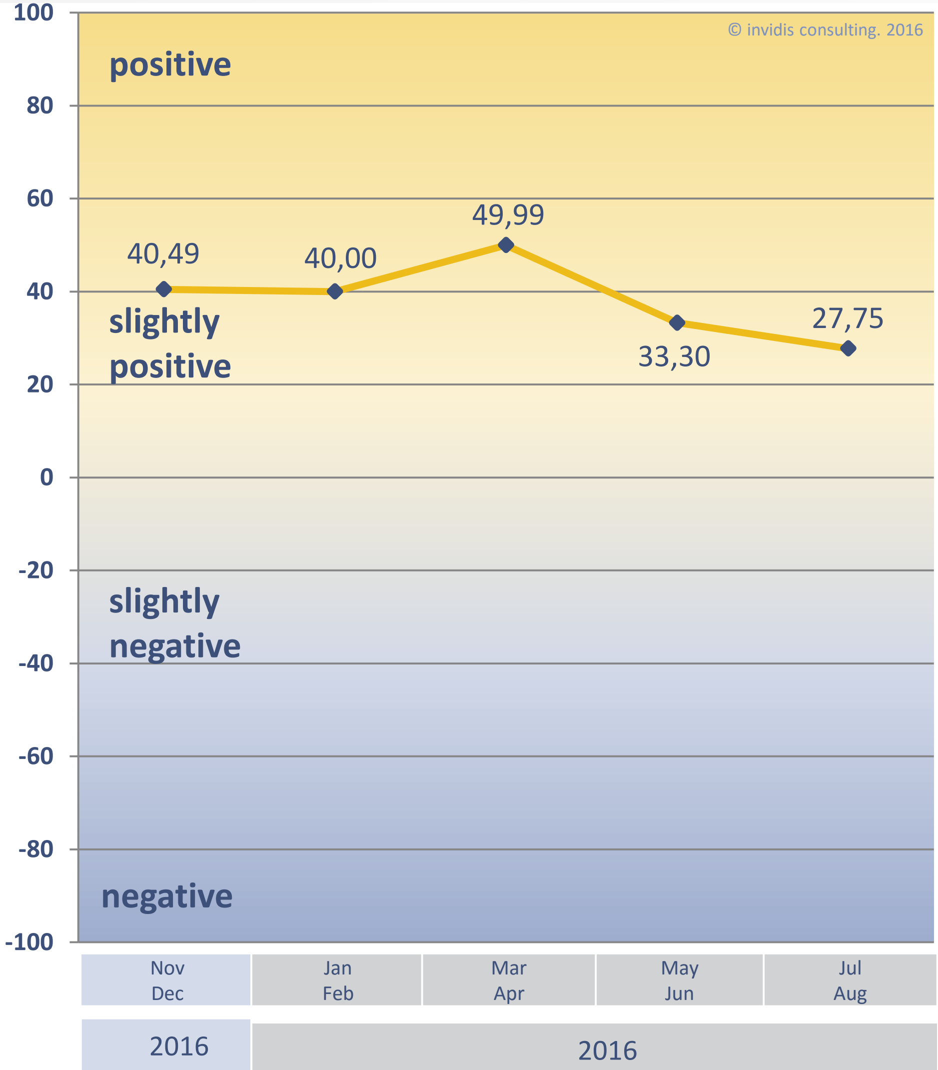


Fig. 1: DBCI GCC July | August 2016, n=18

- Since the last survey in May the Digital Signage Business Climate Index in the GCC region has further declined with a nominal decrease of 55,55 base points from 33,30 base points to 27,75 base points. In total the Index is down by 16,7% compared to the previous survey.
- The conservative assessment of the current business situation for products and services in the Digital Signage and Digital-out-of-Home industry has grown and dominates the index Together with a slight growth of the negative assessment it is responsible for the overall negative trend of the index. Now half of all market participants are currently satisfied, but almost 40% also do not expect the business climate to change towards a more favourable situation within the next six months.

Further Research

- Only 31% of the polled companies in the GCC region have growing revenues in the first semester of 2016. Still over 40% % of the market participants had to accept a decline in revenues in the first two quarters. However, some of those companies are expecting to balance the losses at the end of the year.

previous survey

change
DBCI 2016 #4 **-16,7%**

Participants: n=18; Region: FR; Survey Period: 2016 calendar weeks 28-29

More conservative current business situation & outlook

Current business Situation| France | July/August 2016

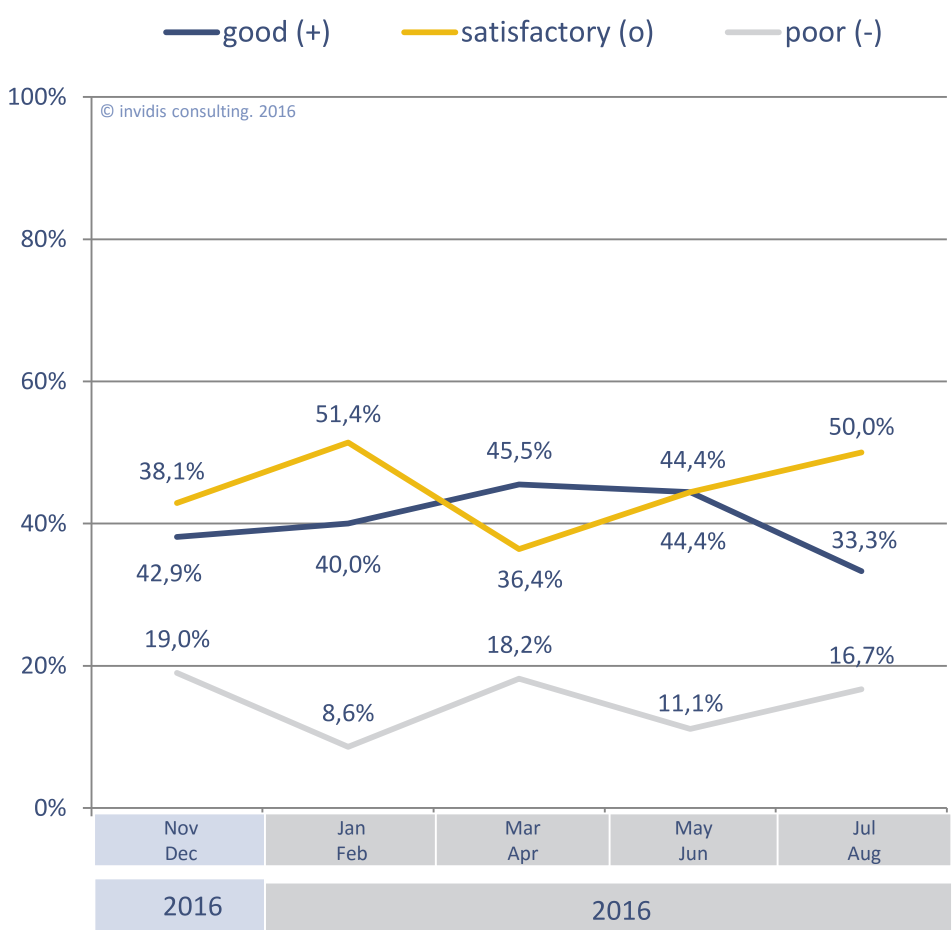


Fig. 2: DBCI GCC July | August 2016 „Business Situation“12 months, n=21

Expectations | France | July/August 2016

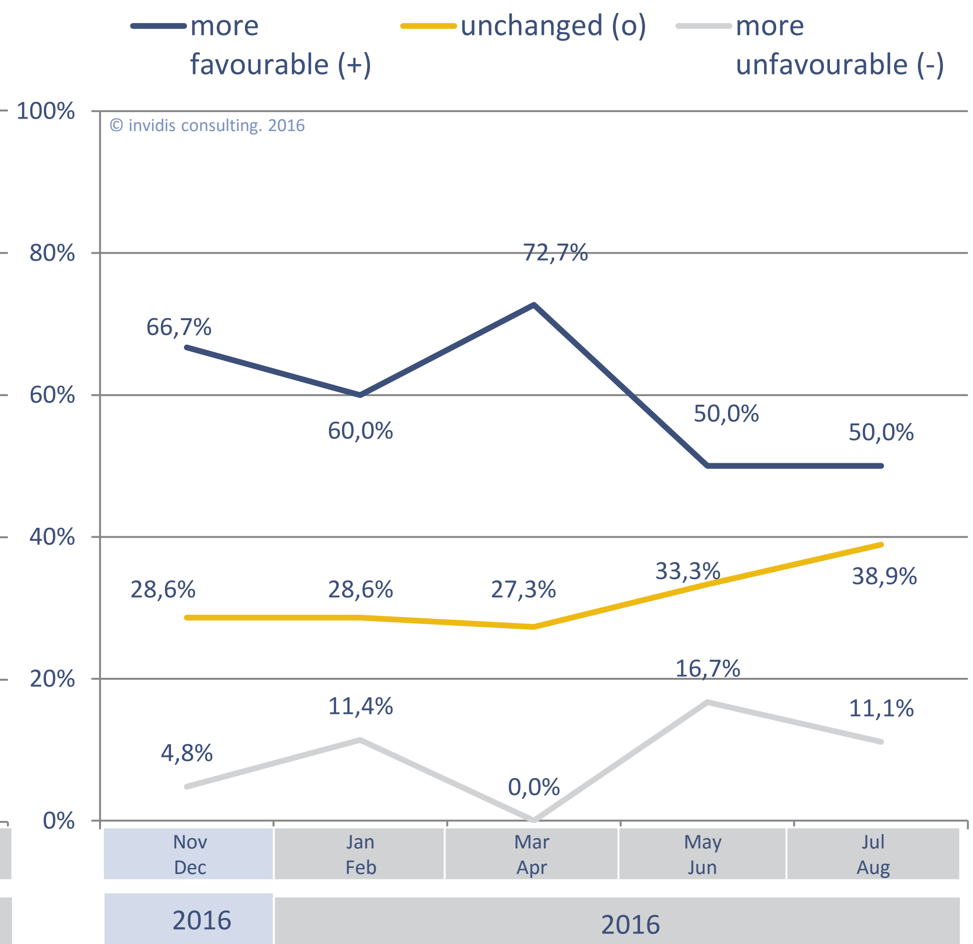


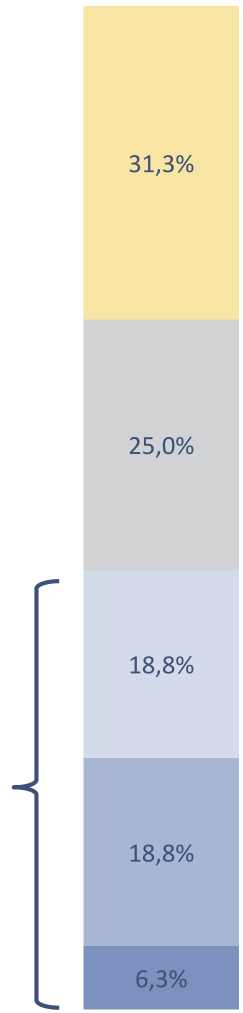
Fig. 3: DBCI GCC July | August 2016 „Expectations“12 months, n=18

Further research| First semester 2016 with marginally 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."

Only 31,3% of all polled companies could generate a clear increase in revenues in the first half year term in 2016 compared to the same period in the previous year

Over 40% of all polled companies had to accept a decrease in revenues compared to the previous year



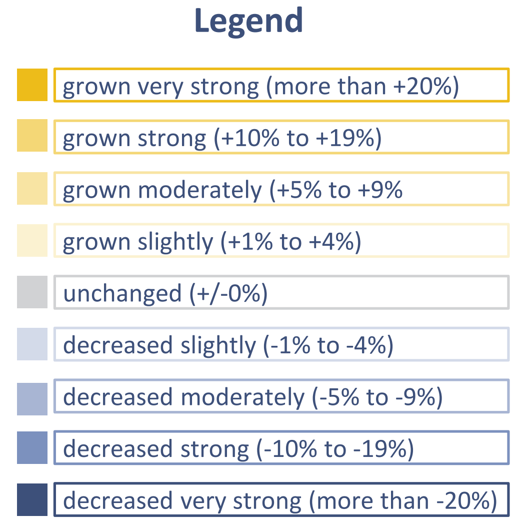


Fig.: 4 DBCI GCC July | August 2016 "revenues H1 2015-2016", n=16

Further research | Small increase in revenues expected for the full year 2016

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

50,2% of all polled companies are expecting a healthy growth in revenues for the year 2016 compared with the previous year

31,4% of all polled companies expect a decrease in revenues compared to the pervious year

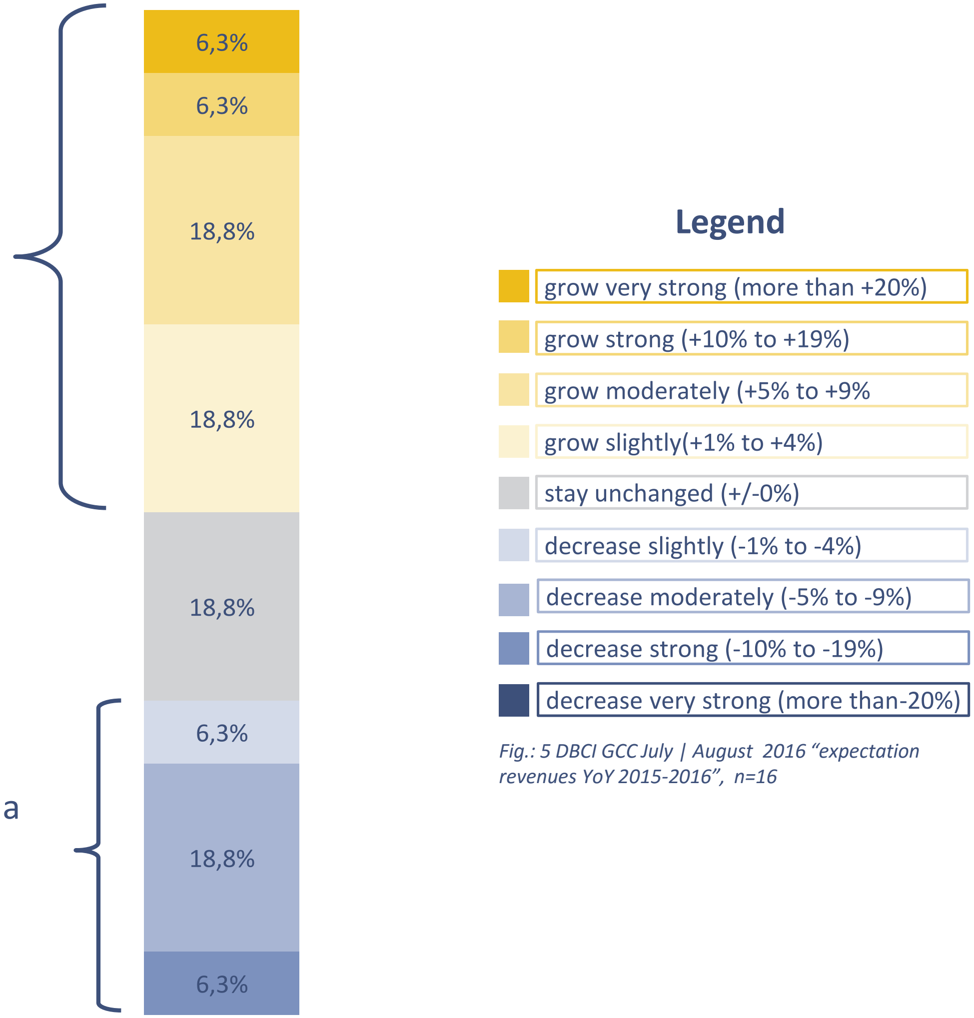
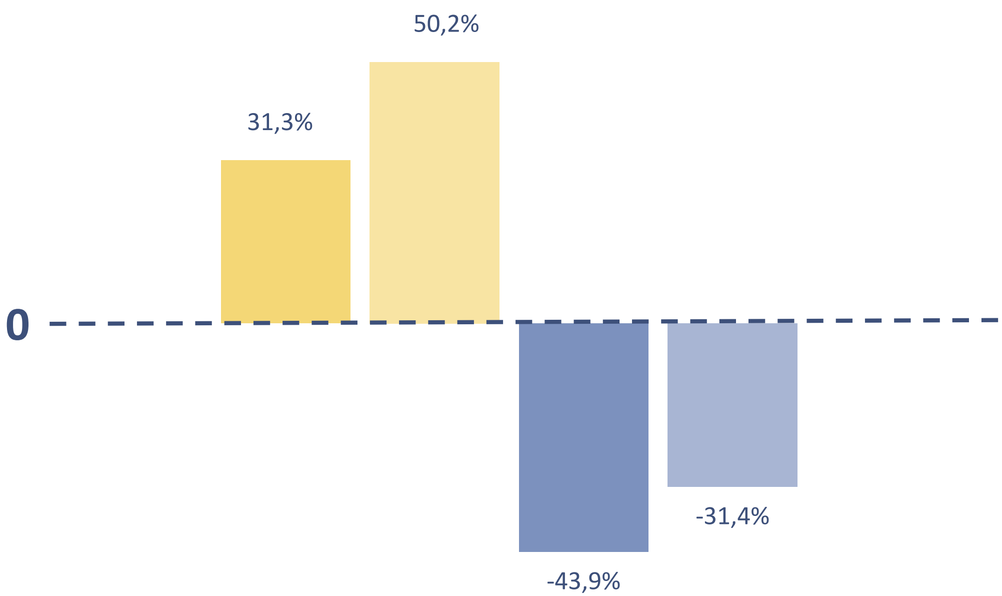


Fig.: 5 DBCI GCC July | August 2016 "expectation revenues YoY 2015-2016", n=16

Further research | Some 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 GCC July | August 2016 "revenues YoY H1 2015-2016 and YoY 2015-2016", n=16

- Only 31,3 % of the polled companies in the GCC region expect to have a growth in revenues in the first semester of 2016 compared to 2015
- Over 43% of all polled companies had to accept a decline in revenues in the first six months of 2016. However some of those companies are expecting to have balanced 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

DBCI | Roadmap 2016 & Contact

2016	
January	
February	
March	
April	
May	
June	
July	
August	
September	DBCI Sep./Oct. | WN40
October	
November	DBCI Nov./Dec. | WN49
December	

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 37-38
- The next planned publication will be in week 40
- 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

Contact
Daniel Russell | Research Analyst
invidis consulting GmbH
Rosenheimer Str. 145e
81671 München
Daniel.Russell@invidis.com
Phone: +49 89 2000416-21
Mobile: +49 151 62438503
Fax: +49 1805 5224 301

DSS | The Digital Signage Summit series

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