

Scandinavia

September | October 2016

**DBCI**

The pulse of the Digital Signage  
and DooH industry



Digital Signage & DooH  
Business Climate Index



**DIGITAL  
SIGNAGE  
SUMMIT**

invidis research  
2016 SK 500





## Digital Signage business sentiment with very positive trend



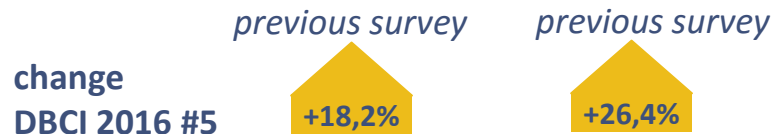
Fig. 1: DBCI Scandinavia September | October 2016 "Index" n=16

Participants: n=16; region: Denmark, Sweden, Norway, Finland & Iceland; time frame: 2016 calendar weeks 38-39

- The Digital Signage Business Climate Index in Scandinavia is on a very positive trend in autumn 2016. The index has seen a nominal increase of 15,66 base points from 59,39 points to 75,05 base points. In total the Index is up by +18,2% year-on-year and +26,4% compared to the previous survey.
- The current business situation shows an enthusiastic sentiment - with negative and neutral ratings in sharp decline
- The outlook towards the near future registered clear increase for the expectation of an *unchanged* good business situation. Also currently almost 70% of the surveyed companies are expecting a *more favourable* business situation for their products and services within the next six months.

### Further Research

- The market participants have again underlined the high importance of the SMB market for Digital Signage, with three quarters of all revenues being generated in this sector
- The DooH industry sees a low growth potential in programmatic buying for DooH until 2020.





# Enthusiastic current business situation, but more conservative optimistic outlook

Current business Situation | Scandinavia | September/October 2016

Expectations | Scandinavia | September/October 2016

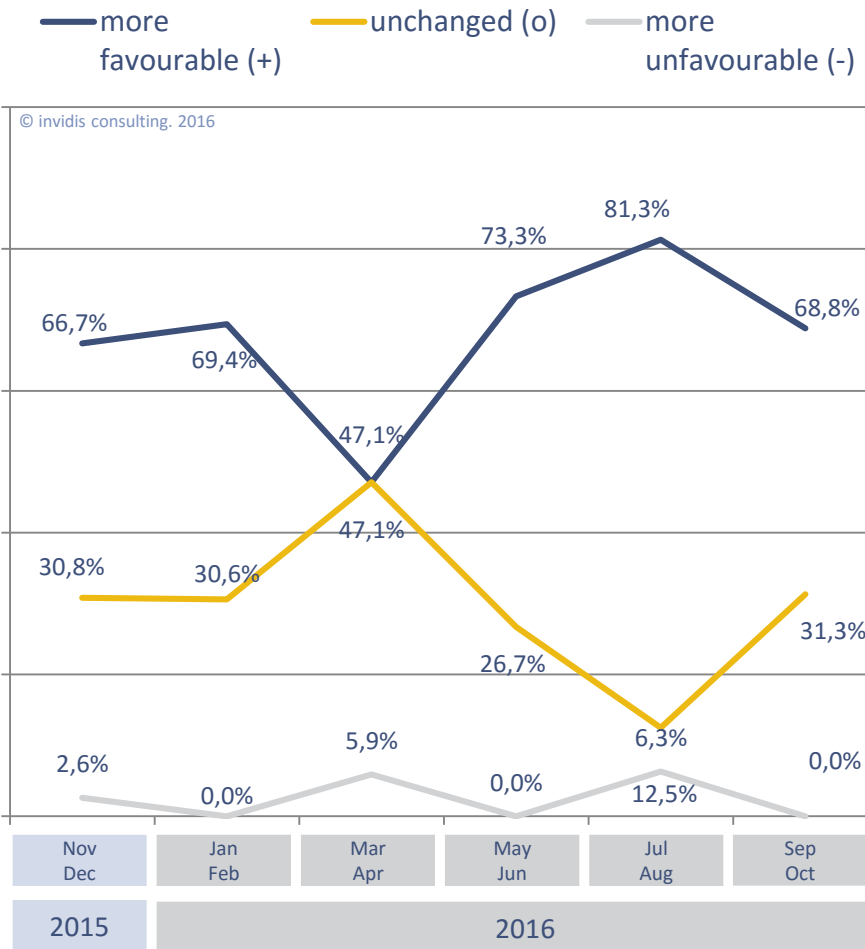
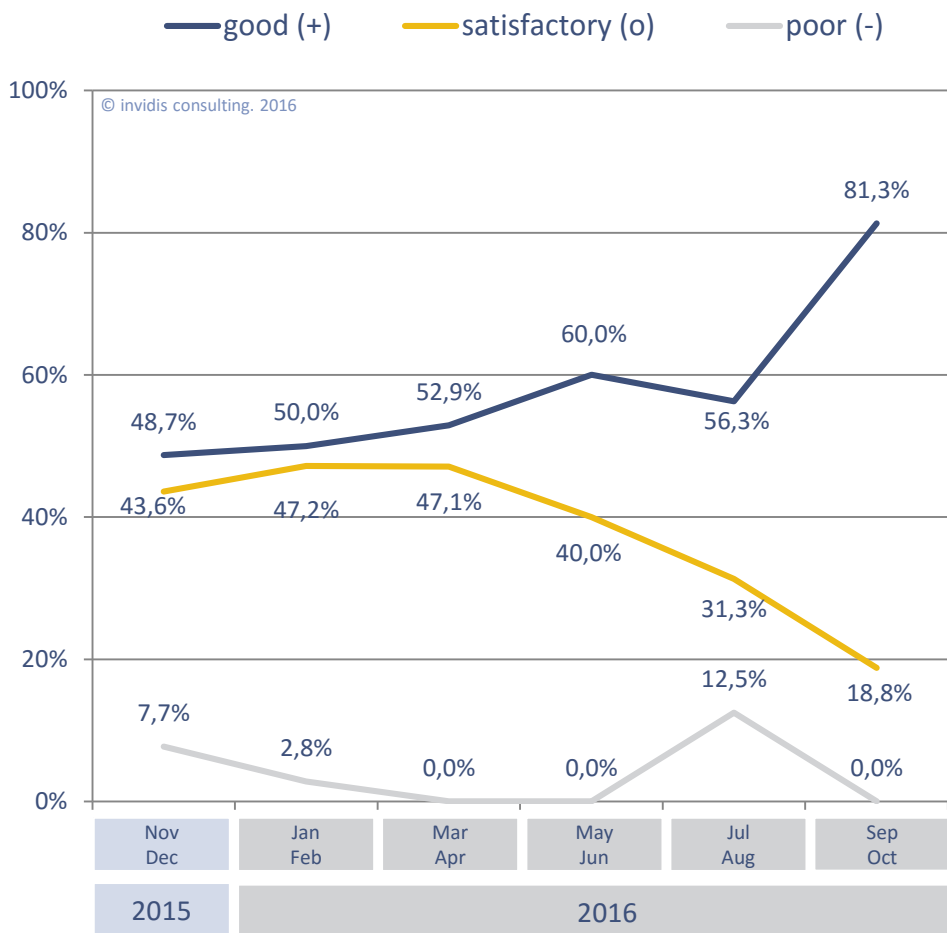


Fig. 2: DBCI Scandinavia September | October 2016 „Business Situation“, n=16

Fig. 3: DBCI Scandinavia September | October 2016 „Expectations“, n=16



## Further research | The SMB sector drives Digital Signage revenues

**Question:** How many projects did your company roll out in the following categories in 2015?

- Three quarters of all DS projects in 2015 were small and medium installations with up to 50 displays
- Smaller projects have a higher margin and can be carried out successfully by most players in the market
- Falling hardware prices created a high demand for easy-to-use Digital Signage solutions in the SMB sector
- Only 12% of all Digital Signage networks are larger than 100 displays
- Large projects generate high revenues, but discounts increase with the number of hardware used and tear into the margin. Moreover, only few market participants can sustainably carry out projects with over 100 displays.
- Over the last two years the split has remained similar, only the percentage of large scale projects has doubled from 6% to 12%..

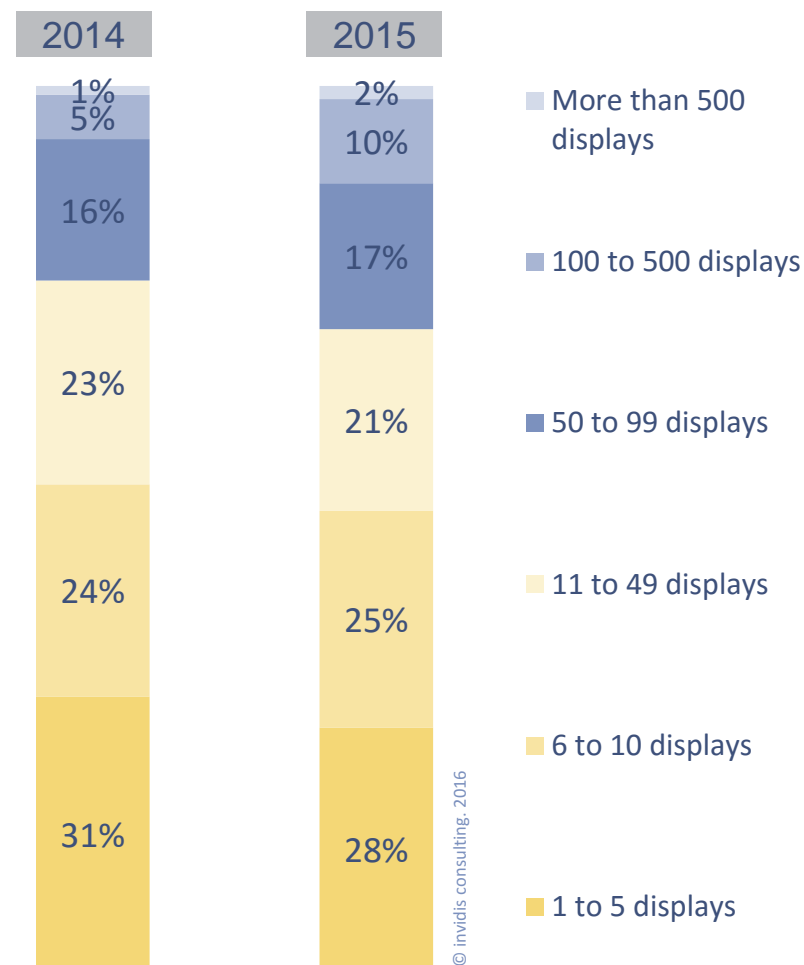


Fig. 4: DBCI Scandinavia September | October 2016 „project sizes 2013-15“, n=16



## Further research | Slow growth for programmatic buying in DooH expected

### Forecast market share programmatic buying DooH in 2017

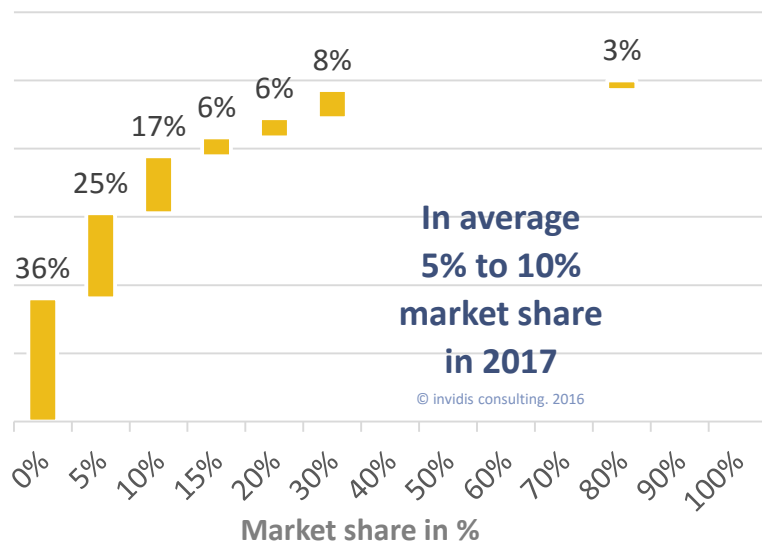


Fig. 5: DBCI Scandinavia September | October 2016 "market share programmatic 2017", n=36

### Forecast market share programmatic buying DooH in 2020

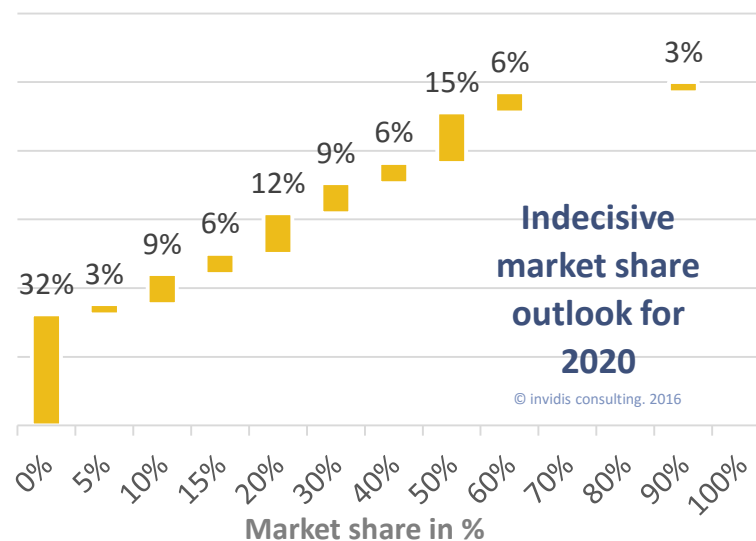


Fig. 6: DBCI Scandinavia September | October 2016 "market share programmatic 2020", n=34

**Question:** How high do you expect will be the percentage of revenues generated from programmatic buying compared to your total revenues?

- The market players see a slow growth potential in programmatic buying for DooH. They expect that the market share will reach approximately 5% in 2017. The picture for 2020 is much more indecisive as the survey participants are very undecided in their assessment.
- Also many polled companies remain sceptical of the potential for programmatic buying in DooH. One third of the market expects no effects at all, even in the future. While the business concept has some definite potential, there are still many technical issues to be solved.



## Roadmap 2016 & Contact

2016

January

February

March

April

May

June

July

August

September

October

November

December

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 48-49
- The next planned publication date will be in week 50
- 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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## DSS | The Digital Signage Summit series



- «Digital Signage Summit» is the leading event series for digital signage conferences in EMEA and North America
- 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
- Join us at one of our upcoming events in
  - DSS Russia | Moscow: 1. - 2. November 2016
  - DSS NYC | New York City: 9. November 2016
  - DSS MENA | Dubai: 6.-7. December 2016
  - DSS @ISE | Amsterdam: 8. February 2017
  - DSS South Africa | Johannesburg: 6. April 2017
  - DSS Orlando | Orlando: 13. June 2017
  - DSS Europe | Munich: 5.-6. July 2017
- More information at [digitalsignagesummit.org](http://digitalsignagesummit.org)