

Germany

Austria

Switzerland

November | December
2016

DBCI

The pulse of the Digital Signage
and DooH industry



Digital Signage & DooH
Business Climate Index



DSF Europe cooperation partner Switzerland:



invidis research
2016 DE 600 en



Robust Digital Signage business sentiment at the end of the year



Fig. 1: DBCI November | December 2016 „Index DE-AT-CH“ rolling 12 months, n=86

- The Digital Signage Business Climate Index continues its rather stable trend on a positive level towards the end of the year. The index saw a nominal decrease of 2,35 base points from 57,00 points to 54,65 base points. In total the Index is down by -5,3% year-on-year and -4,1% compared to the previous survey.
- The robust current sentiment in the Digital Signage industry reflects the good overall development in the ITC industry. “In spite of global insecurities like the Brexit vote and the presidential election in the USA, the growth forecast for the year 2016 can be confirmed.” As Mr. Bernhard Rohleder, Managing Director of the IT industry association Bitcom states. Only the sixth month outlook is rather more cautious.

Further Research

- The Digital Signage Top trends for 2017 are interactivity, market growth and high-brightness technology
- The DooH market participants expect a positive effect from the increasing implementation of cross media campaigns. Also the existing networks will be further developed.

	<i>year-on-year</i>	<i>previous survey</i>
Change DBCI 2016 #6	-5,3%	-4,1%

Participants: n=86; Region: DE/AT/CH; Survey Period: 2016 calendar weeks 45-46



Enhanced current business situation, but more conservative outlook

Current business situation | DE-AT-CH | November/December 2016 Expectations | DE-AT-CH | November/December 2016

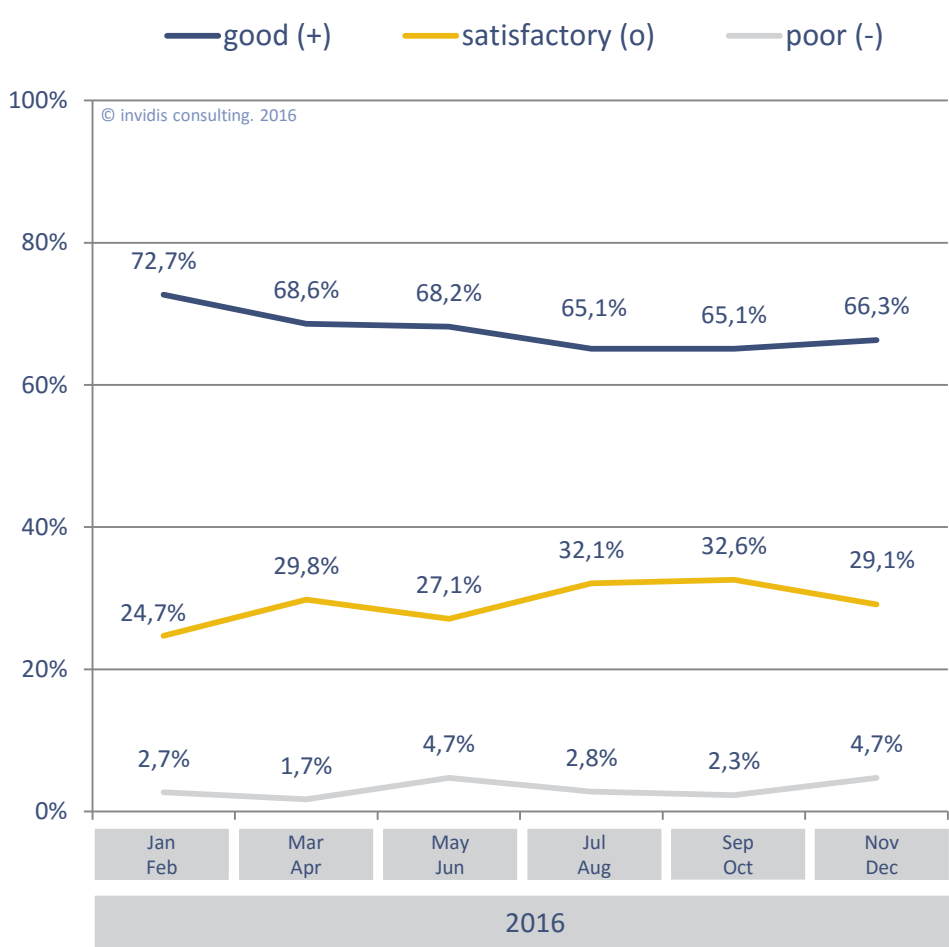


Fig. 2: DBCI November | December 2016 „Business Situation DE-AT-CH“ rolling 12 months, n=86

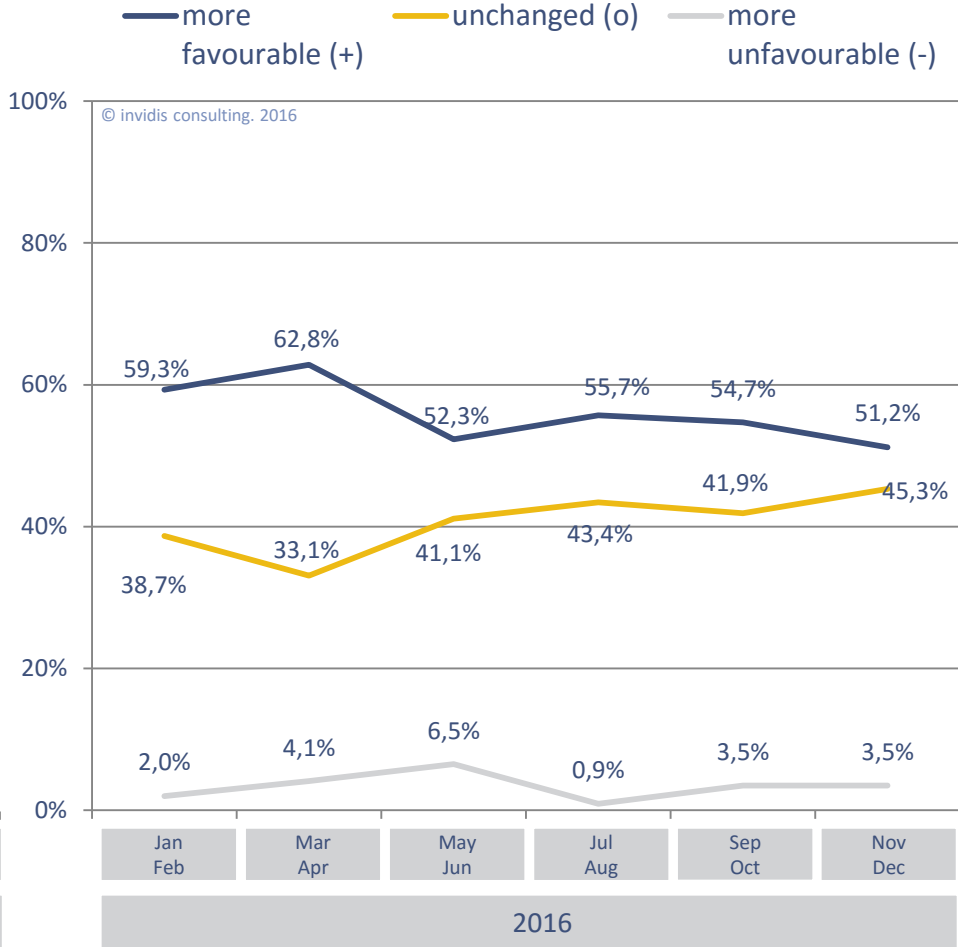
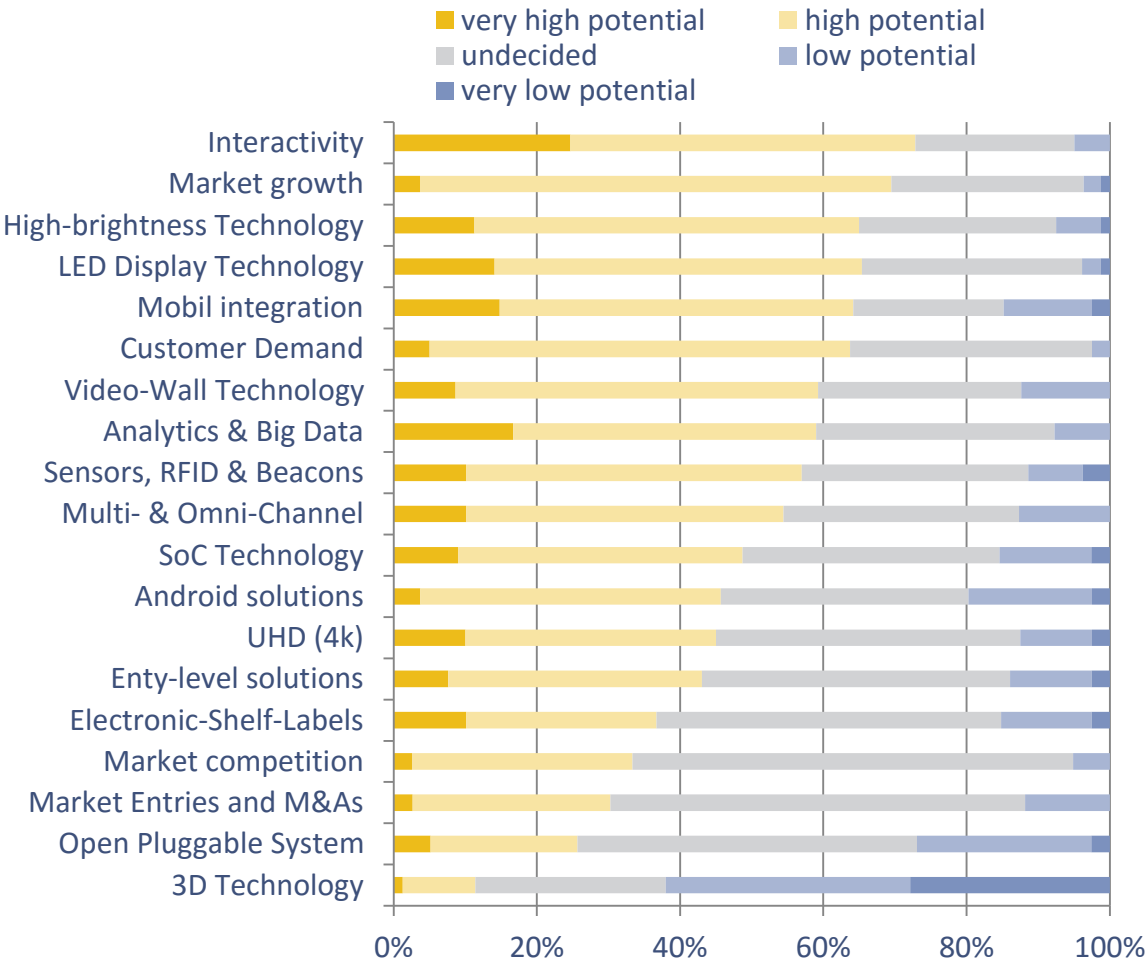


Fig. 3: DBCI November | December 2016 „Expectations DE-AT-CH“ rolling 12 months, n=86



Digital Signage Trends 2017 | High potential for interactivity and further market growth

Question: „Which important Digital Signage trends will become relevant in 2017 and which will lose in relevance?“



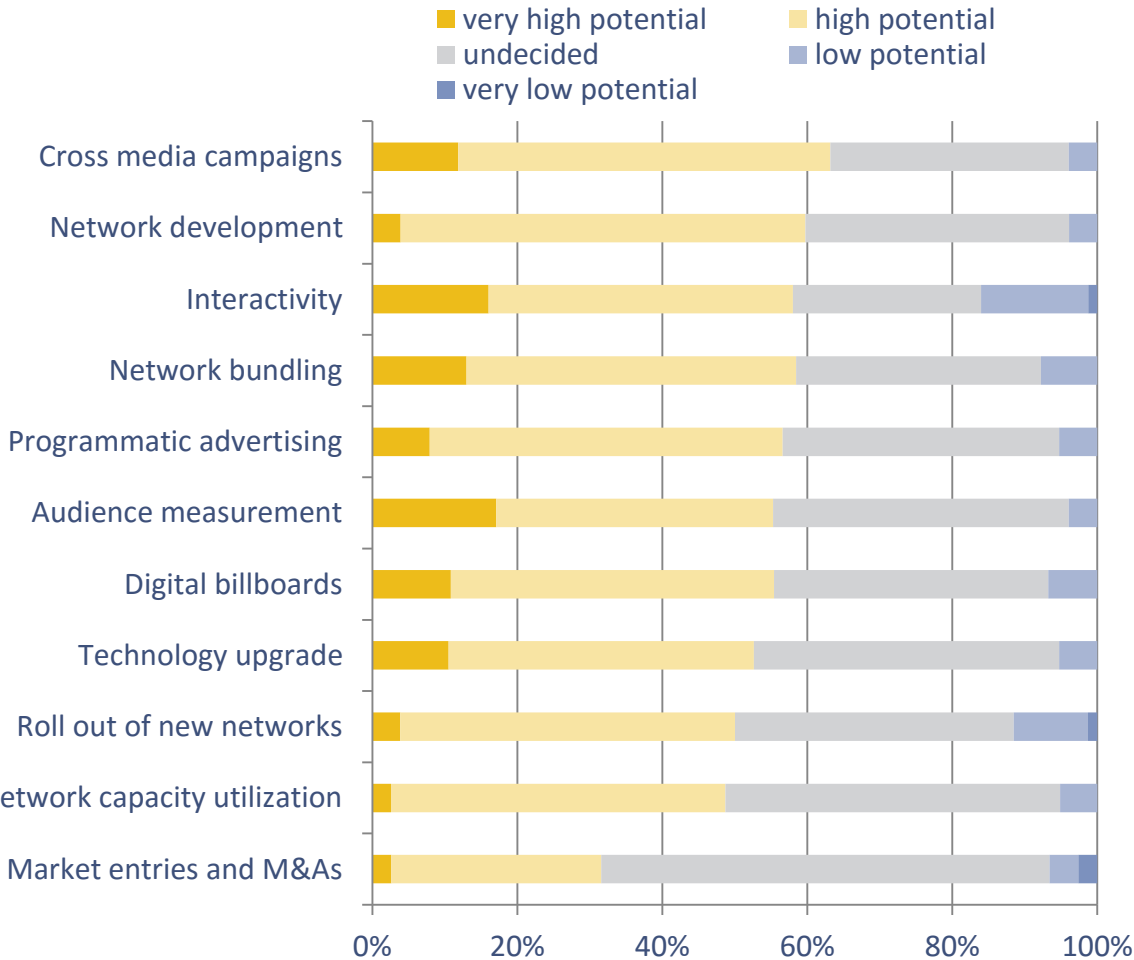
- The market participants identified many different trends for the year 2017. In their eyes the most dominant trend is interactivity. Touch technology is becoming extensively integrated and now more and more smart concepts have markedly increased the joy-of-use. This development will pick up traction in the future.
- Overall the surveyed companies trust the positive development in the market with continues growth potential and they expect even better business in the next year.
- Top of the trends are also technological developments that are closely connected with the retail environment. Particularly, high quality display technology suitable for an outward facing implementation (high brightness/sunlight readable) is opening up the potential of endless miles of shop windows. Also LED display technology is becoming more and more popular with retailers, as it has high brightness, can be used indoors and outdoors and its modularity overcomes the rigid adherence to the 16:9 format by most LCD displays

Fig. 4: DBCI November/December 2016 "Digital Signage Trends 2017 Germany, Austria & Switzerland", n=79 (mean value)



Digital out of Home Trends 2017 | Cross media campaigns will drive the market

Question: „Which important Digital out of Home trends will become relevant in 2017 and which will lose in relevance?“



- In general the Digital out of Home industry is banking on the positive effects of cross media campaigns. Here the business will strongly rely on shifting budgets from online video towards DooH.
- Also the bundling of networks will create more interesting products and the industry will have more success with the advertiser in offering a national reach and a dedicated target audience.
- Interactivity is also becoming a major trend. However, due to the difficulties of the technical implementation, the primary use case will remain the single installation & prime location campaign.
- Concerning the business side, the surveyed companies expect to see more development for existing networks like additional locations or better technology. They don't expect the market situation to change much, namely no roll-outs of new networks and no market entries.

Fig. 4: DBCI November/December 2016 "Digital out of Home Trends 2017 Germany, Austria & Switzerland", n=76 (mean value)

   DBCI | Roadmap 2016 & Contact

2017	
January	Jan./Feb. 2017/01/30
February	
March	Mar./Apr. 2017/03/27
April	
May	May./Jun. 2017/05/29
June	
July	Jul./Aug. 2017/07/24
August	
September	Sep./Oct. 2017/09/25
October	
November	Nov./Dec. 2017/11/27
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 2-3 of 2017. The next planned publication date will be the 30th of January 2017
- 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 2017. For further information please contact Daniel Russell.

invidis consulting

invidis is a renowned boutique consulting and research house based in Munich. Delivering actionable information and advise to customers across EMEA.

Contact

Daniel Russell | Research Analyst

Daniel.Russell@invidis.com

Phone: +49 89 2000416-21

DSS | The Digital Signage Summit series



THE LEADING DIGITAL SIGNAGE AND DIGITAL OUT OF HOME STRATEGY CONFERENCE 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