

Germany
Austria
Switzerland
1st Quarter 2017

DBCI



Digital Signage & DooH
Business Climate Index

DSF Europe cooperation partner Switzerland:



The pulse of the Digital Signage
and DooH industry



invidis
CONSULTING



**digital
signage
summit
europe**

05-06 JULY 2017
MUNICH
GERMANY



Strong positive increase in the Digital Signage business sentiment



Fig. 1: DBCI 1st Quarter 2017 „Index DE-AT-CH“ rolling 12 months, n=102

- The Digital Signage Business Climate Index has strongly increased and risen to a very positive level for the start of the new year. The index saw an increase of 15,90 base points from 54,65 points to 70,55 base points.
- Business Sentiment in the Digital Signage Industry in Germany, Austria and Switzerland reaches new heights. The current demand for digital signage solutions has risen 10% yoy and almost 30% versus the previous survey.
- The excellent business sentiment reflects the general economic situation in the region with solid GDP growth and very stable outlook for 2017. Even Brexit, important elections in major EU-markets as well as the election of the trump administration, have not significantly hampered business climate.
- We record positive developments in brick and mortar digitalisation, solid expansion in DooH networks and more international projects out of the DACH market.
- New display technologies, strong demand for ESL and other retail based digital signage as well as a combination of consolidation/new market entrees bring new impulses to the market.

	<i>year-on-year</i>	<i>previous survey</i>
Change DBCI 2017 Q1	+10,8%	+29,1%

Participants: n=102; Region: DE/AT/CH; Survey Period: 2017 calendar weeks 2-3



Drastically enhanced current business situation and enthusiastic outlook

Current business situation | DE-AT-CH | 1st quarter 2017

Expectations | DE-AT-CH | 1st quarter 2017

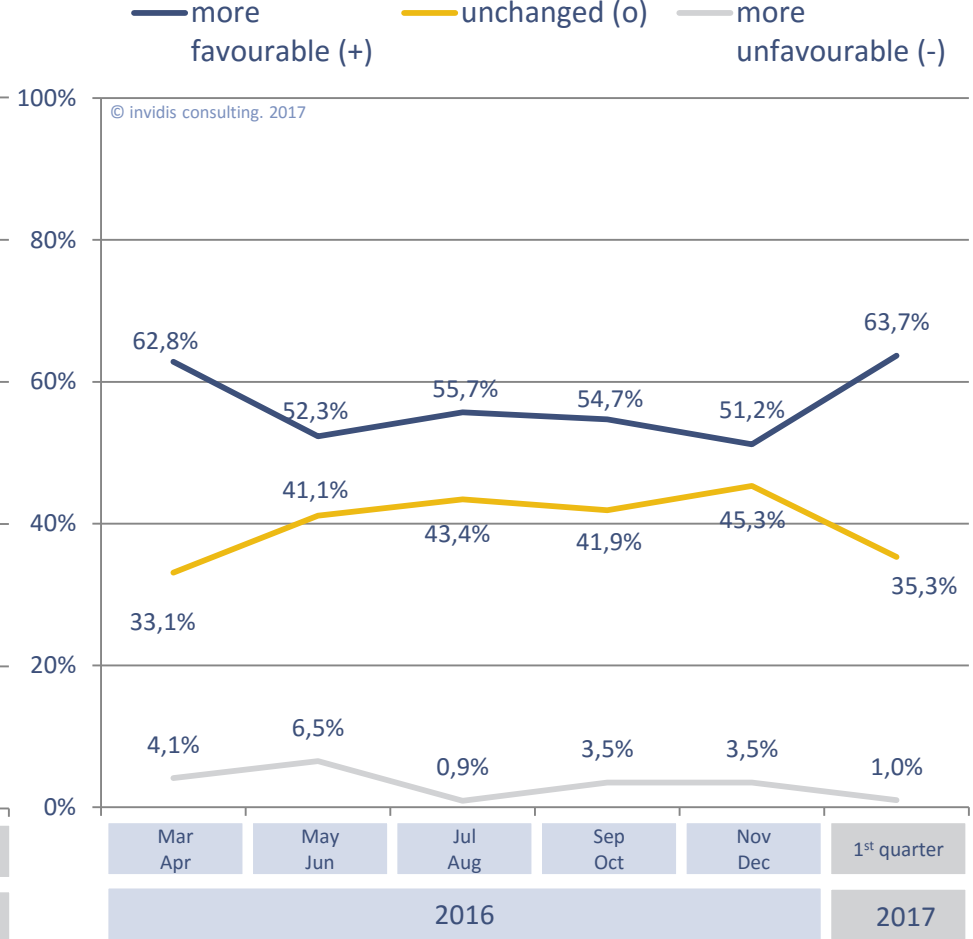
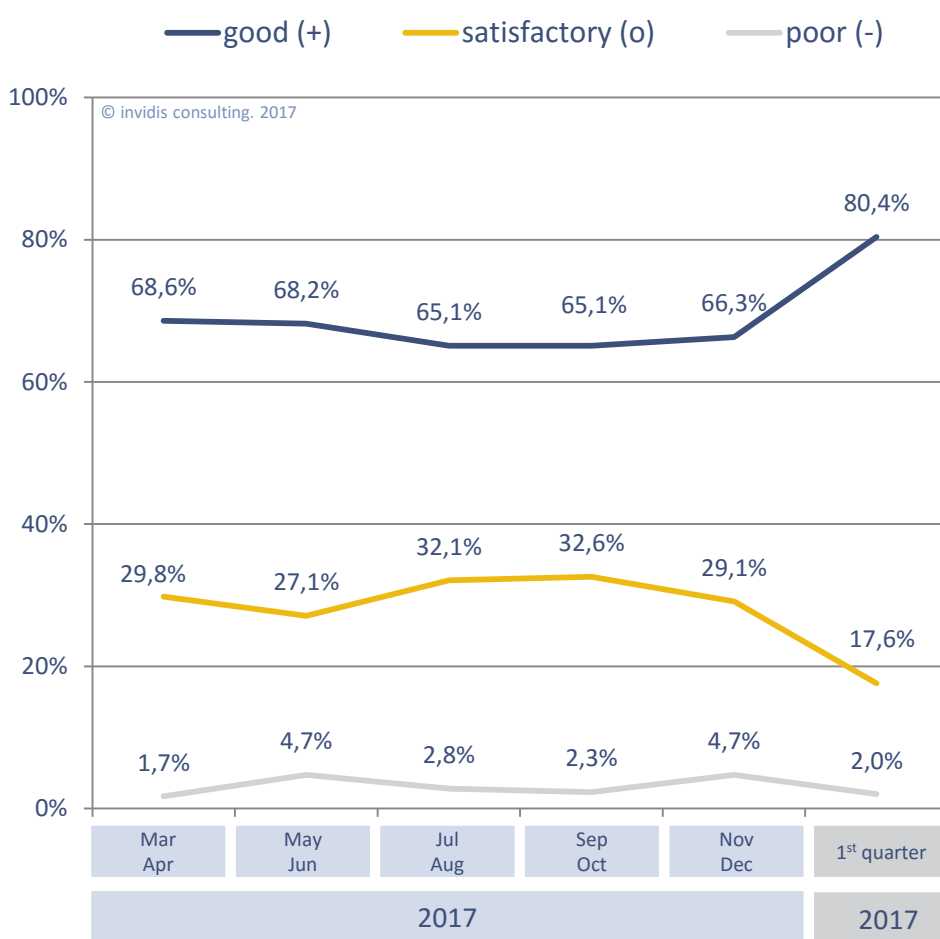


Fig. 2: DBCI 1st Quarter 2017 „Business Situation DE-AT-CH“ rolling 12 months, n=102

Fig. 3: DBCI 1st Quarter 2017 „Expectations DE-AT-CH“ rolling 12 months, n=102



Hirings 2016 | Digital Signage creates many new jobs

- 56,9% of all companies in the Digital Signage market in Germany, Austria and Switzerland have hired new staff in 2016. In total between 250-300 new jobs were created.
- The digital transformation in private and business life is responsible for an unbroken positive trend in the IT industry. Overall this has developed into a definite shortage of qualified personal. Companies are more and more concerned, how they can match recruiting with their growth strategy.
- As a whole there is a high demand for digital experts on all management levels. Particularly qualified project managers and key account positions are in demand. But also technicians, programmers and administrators can be difficult to hire in highly industrialised regions where the competition for talent is strong.
- The increasing expansion in vertical markets by Digital Signage companies leads to a demand for more professionals from different industry branches.

Company growth in new jobs created 2016

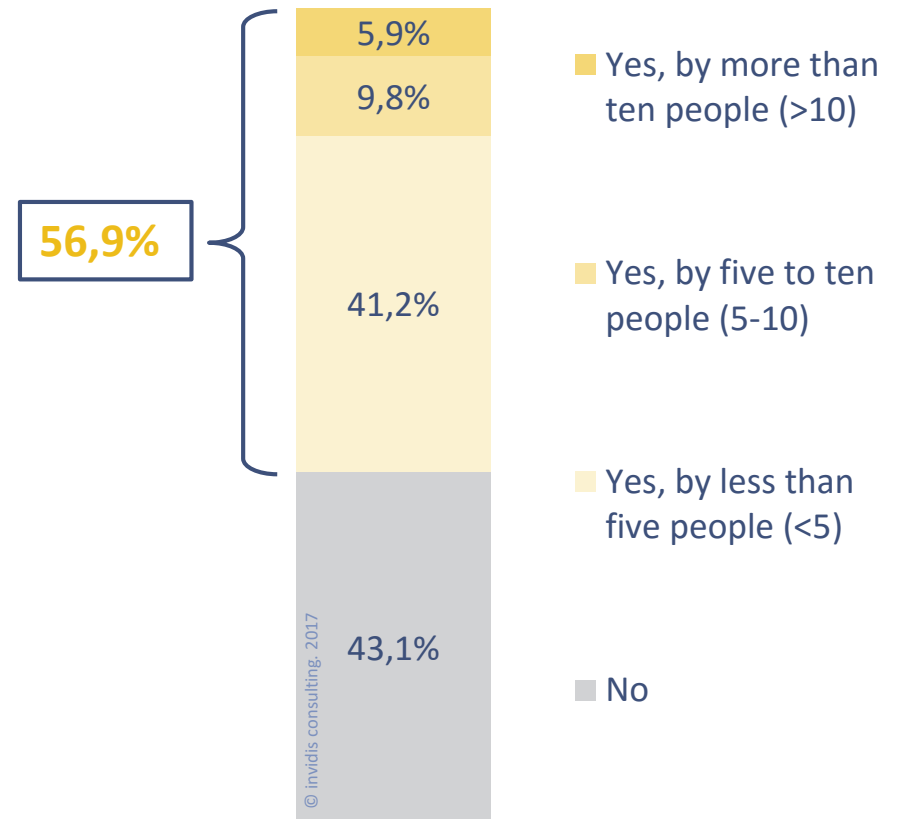


Fig. 4: DBCI DACH 1st Quarter 2017 "Hirings 2016 DE-AT-CH", n=102

DBCI | Roadmap 2017 & Contact

2017
January
February
March
April
May
June
July
August
September
October
November
December

← 2nd quarter | 2017

← 3rd quarter | 2017

← 4th quarter | 2017

- The DBCI has recalibrated its iteration from a two month period to a three month period starting in 2017
- The next survey will take place in calendar weeks 14-15 of 2017. The next planned publication date will be the first week of May 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



- «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 Orlando | Orlando: 14/16. June 2017
 - DSS Europe | Munich: 5.-6. July 2017
 - DSS MENA | Dubai: September 2017
 - DSS Russia | Moscow: October 2017
 - DSS Africa | Johannesburg: October 2017
- More information at digitalsignagesummit.org