

GCC

1st Quarter 2017

DBCI

The pulse of the Digital Signage
and DooH industry



Digital Signage & DooH
Business Climate Index



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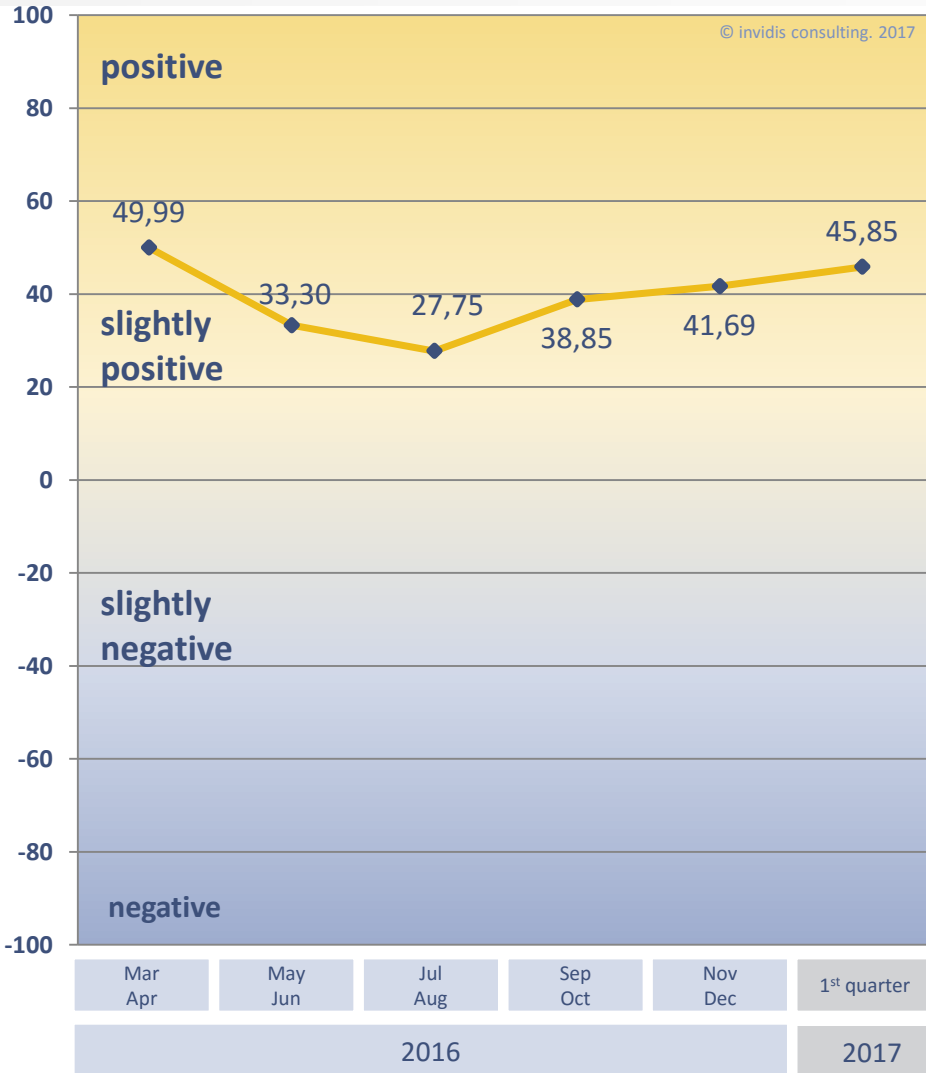


**digital
signage
summit
europe**

05-06 JULY 2017
MUNICH
GERMANY

invidis research
2017 GCC 100

The new year starts with increasingly positive business sentiment



- Since the summer of 2016 the Digital Signage Business Climate Index in the GCC region has continued its positive trend. It increased from 41, 69 base points in the last survey by 4,16 base points to 45,85 base points. In total the Index is up by 10% compared to the previous survey.
- The positive and satisfied assessment of the current business situation for products and services in the Digital Signage and Digital-out-of-Home industry is steady and dominates the index. Together with a declining negative assessment it is responsible for the overall positive trend.
- The outlook towards the near future shows a similar trend. The ratio of market participants expecting the business climate to change towards a more favourable situation within the next six months has dropped by 10% in favour of the neutral ratings.

Further Research

- 74,9% of all companies in the Digital Signage market in the GCC region have hired new staff in 2016. In total between 50-100 new jobs were created.

change **DBCI 2017 #1** previous survey

Participants: n=12; Region: FR; Survey Period: 2017 calendar weeks 2-3

Rather conservative trend for business situation & outlook

Current business Situation | GCC | 1st Quarter 2017

Expectations | GCC | 1st Quarter 2017

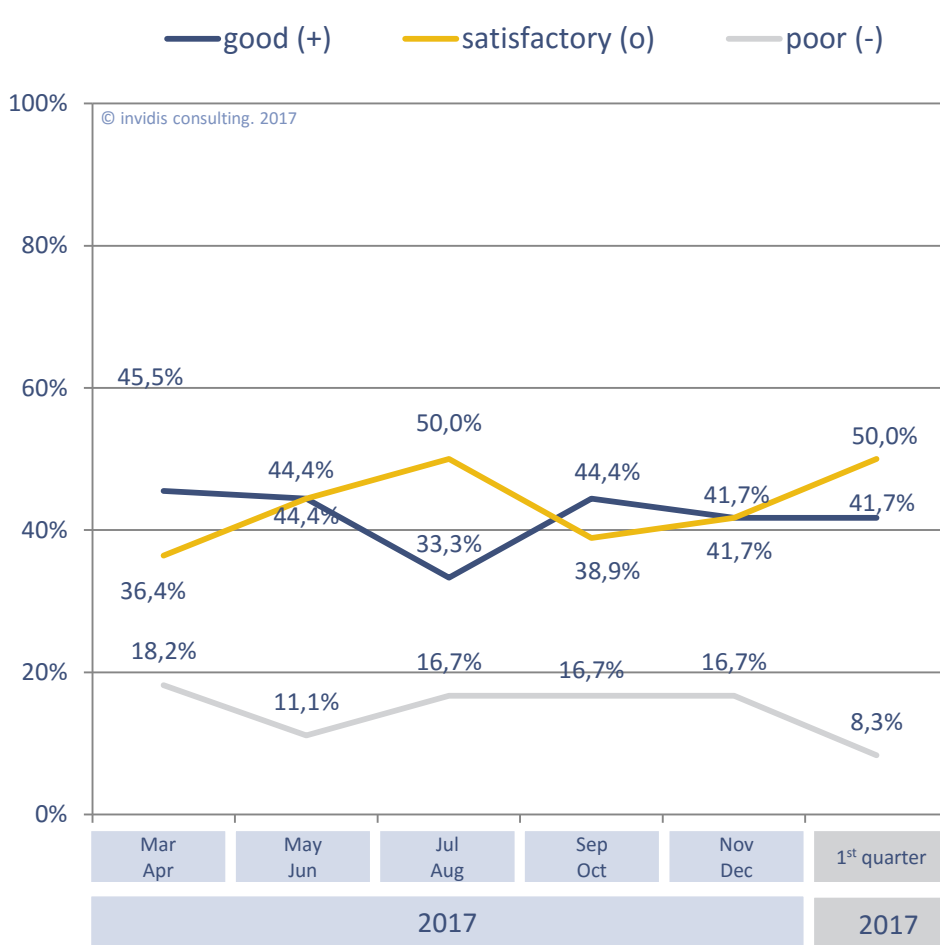


Fig. 2: DBCI GCC 1st Quarter 2017 „Business Situation“, n=12

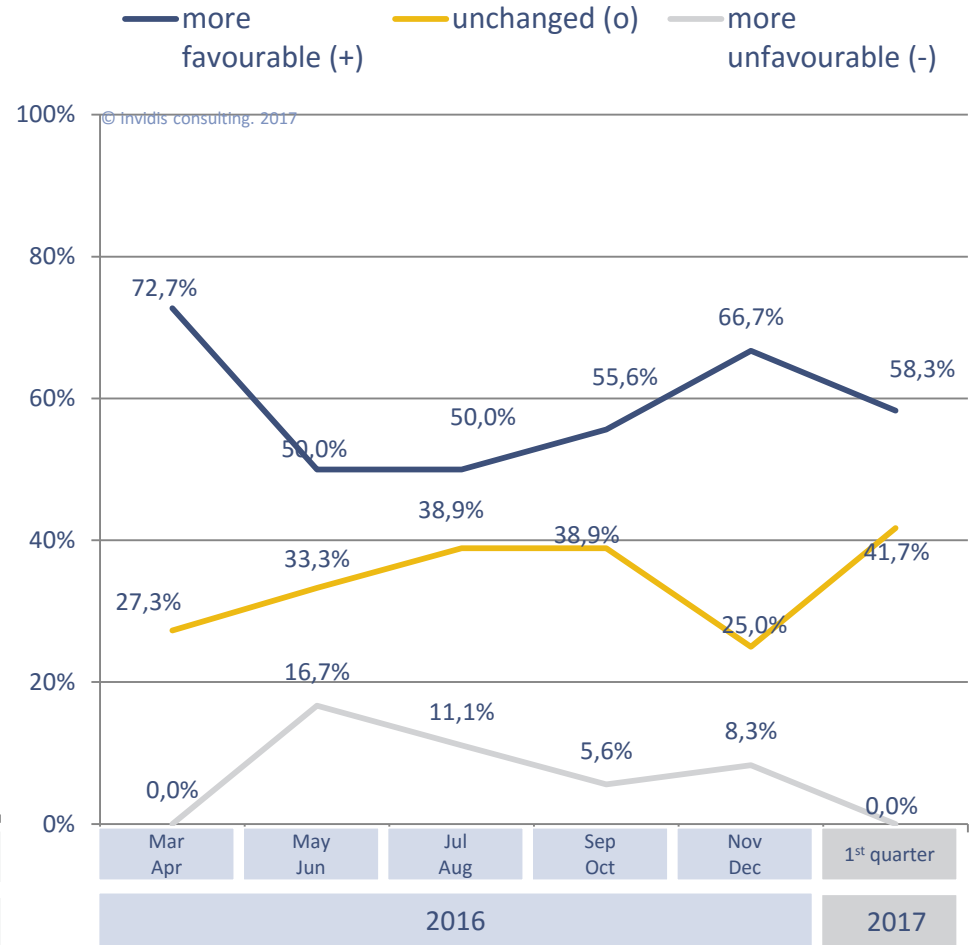


Fig. 3: DBCI GCC 1st Quarter 2017 „Expectations“, n=12

Hirings 2016 | Digital Signage creates many new jobs

- 74,9% of all companies in the Digital Signage market in the GCC region have hired new staff in 2016. In total between 50-100 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 personnel. 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

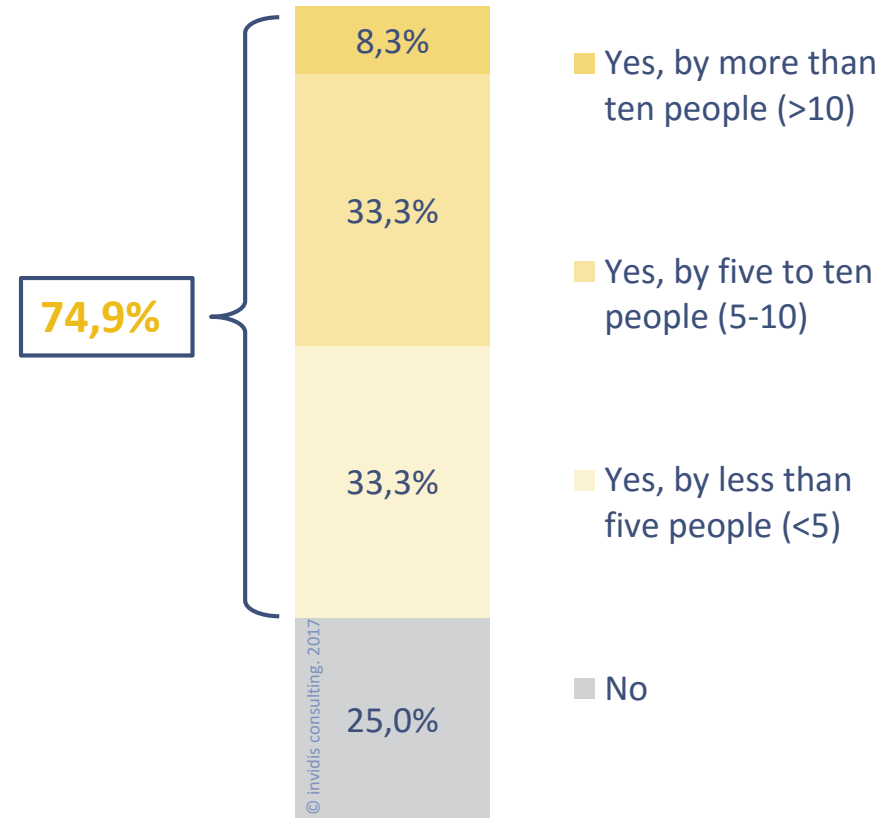


Fig. 4: DBCI GCC 1st Quarter 2017 "Hirings 2016", n=28

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 periode to a tree month periode 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

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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 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