

DBCI Q1 | 2023

DBCI



Digital Signage & DooH
Business Climate Index

The pulse of the Digital Signage and DooH industry



invidis
CONSULTING

07 February 2023

54.1

Q1 | 2023

Current Situation 56,5
Expectations 51,8

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Positive Sentiment

Sentiment in the digital signage industry is very positive. With the beginning of the year 2023, invidis has restarted the Digital Signage Business Climate Index (DBCI). The index will be compiled every quarter reflecting current market situation and expectations for the next six months.

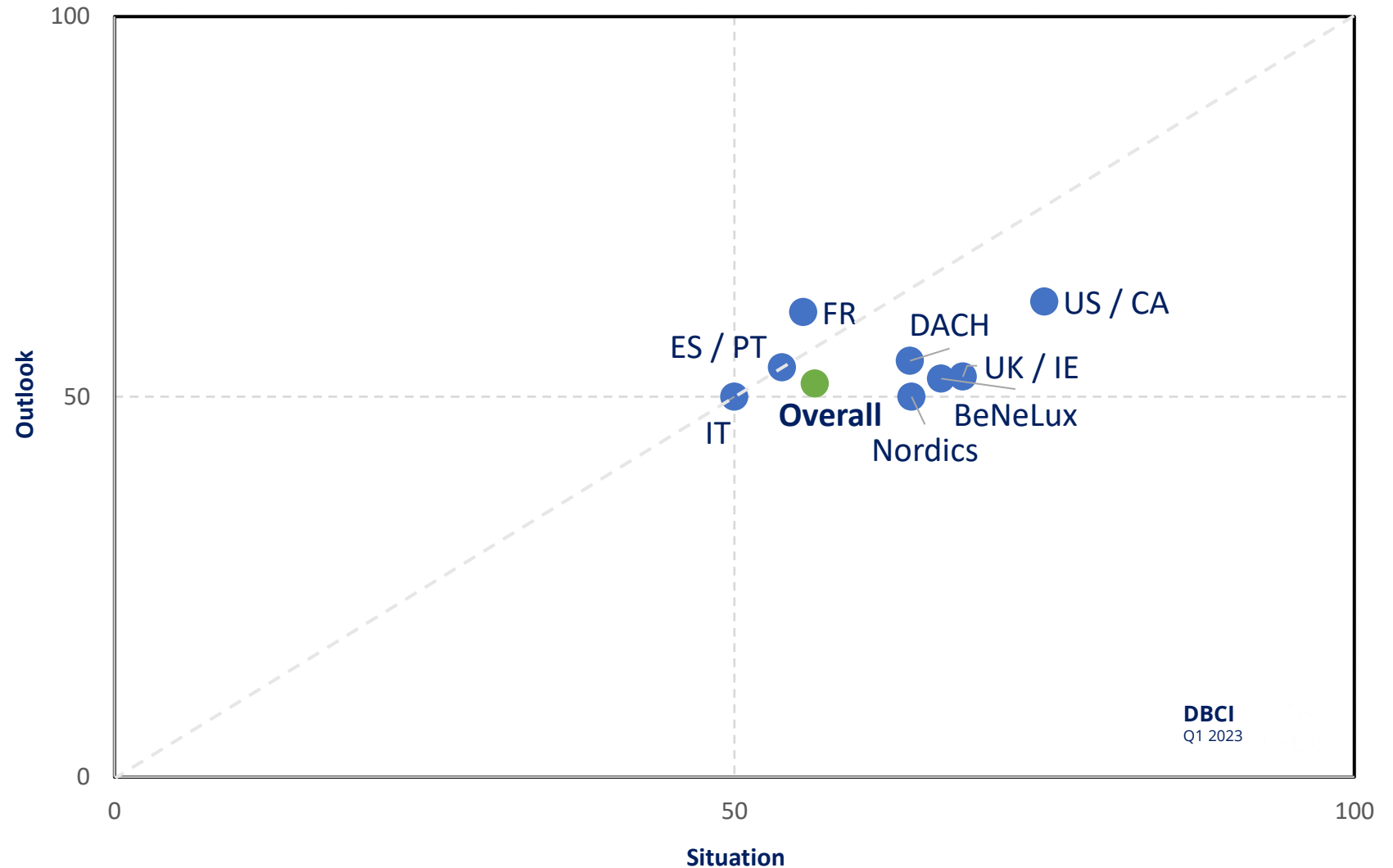
The Q1/2023 index stands at 54.1 reflecting the positive sentiment in the digital signage industry. While the current situation is bright, expectations for the first half of 2023 at 51.8 are more muted.

As the first and last quarter of every year are the busiest order-intake season for digital signage, order volumes in Q2 and Q3 are usually lower which is reflected in the expectation index.

- Rather homogeneous picture in EMEA
- Only France stands out as the only market with a more positive outlook than the current situation
- US businesses with the best situation and most optimistic outlook, although weaker than the current situation
- Overall businesses are cautious on the 6-months outlook

DBCI by region

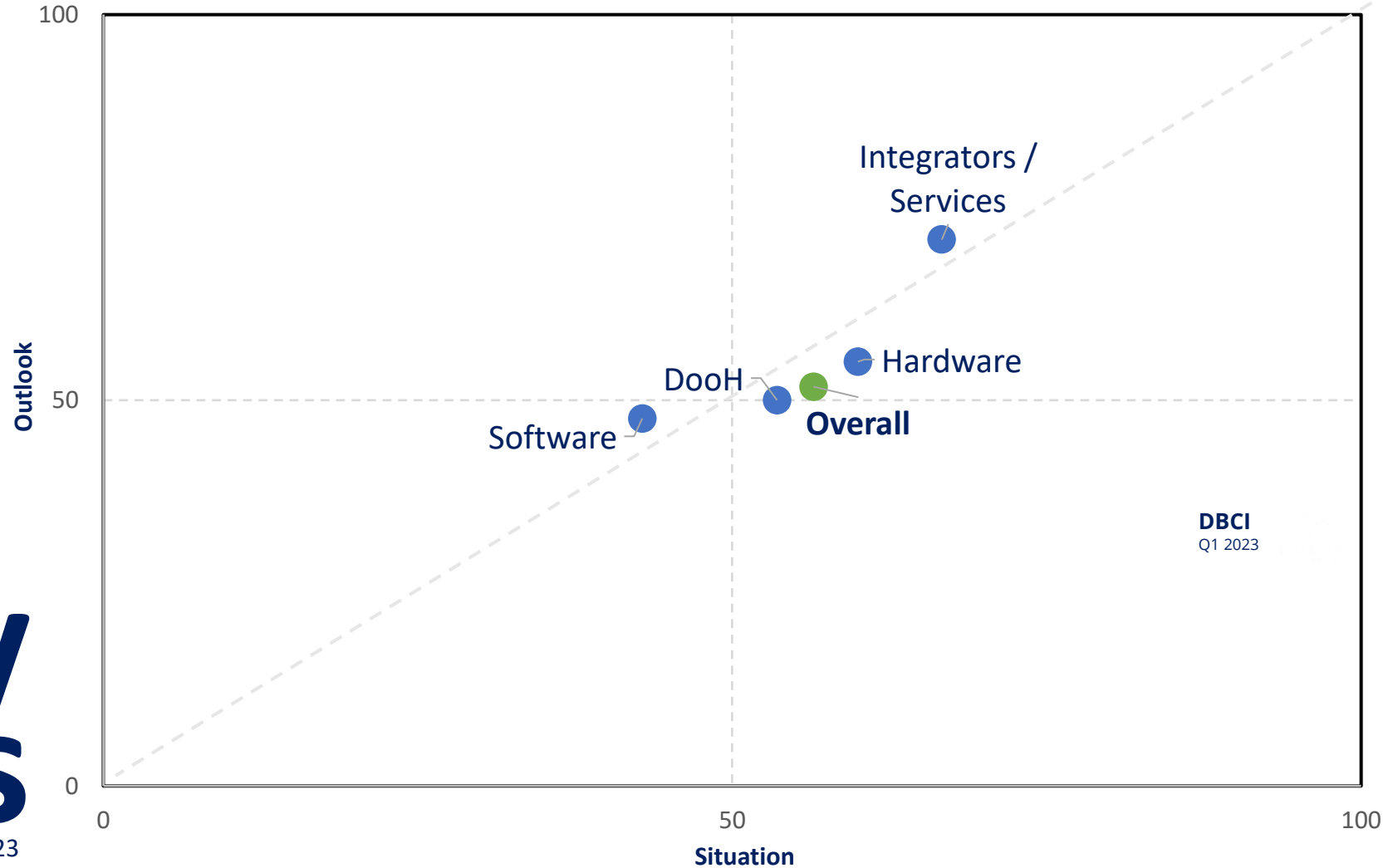
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- Integrators and Service businesses see strong current business and a positive outlook, most likely due to well filled orderbooks, easing supply chain issues, and a post-pandemic catch-up
- On the other end of the spectrum, more Software vendors struggle with the current situation, but see improvements in the near future

DBCI by business

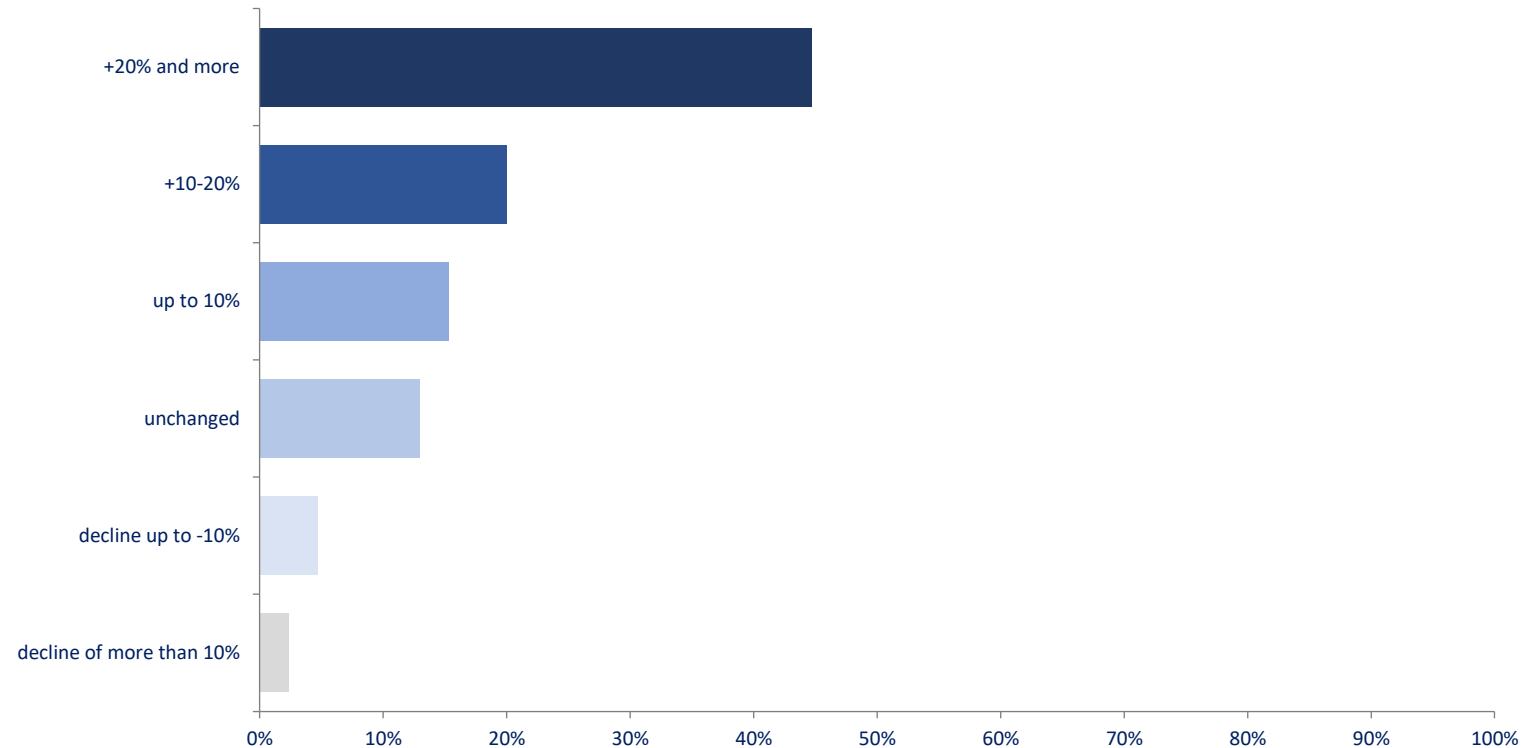
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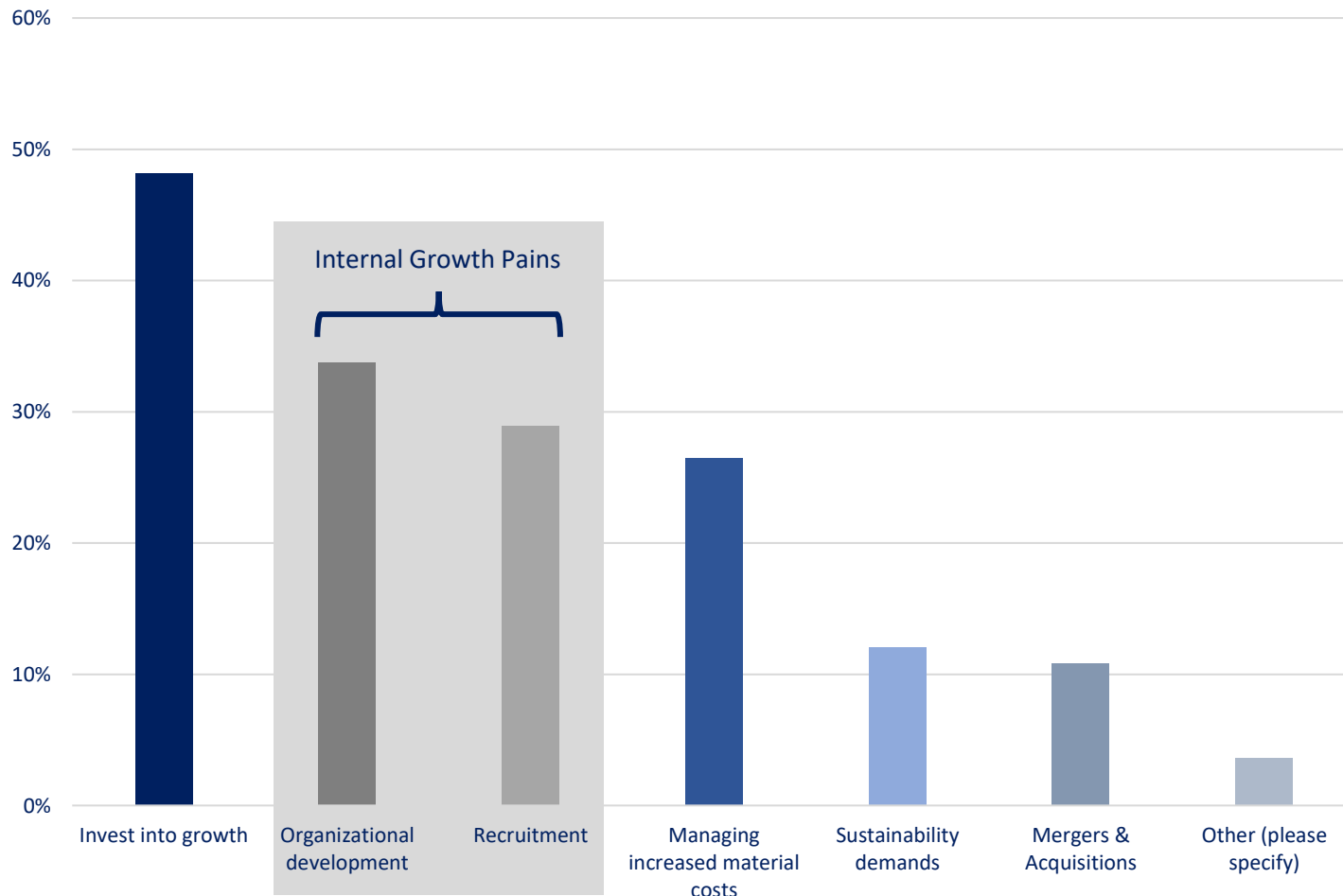
- Two thirds of the companies have seen a double-digit growth
- After a strong growth in 2021 most companies are back to or above pre-pandemic levels
- Stronger growth than other industries in general

2022: Double- Digit Growth



- Not surprisingly, growth is at the top of the agenda for most companies
- At the same time, recruiting and integrating / developing talent is the main growth barrier
- Sustainability is still overlooked by most companies
- 1 in 10 companies is considering M&A activities

2023 Top Challenges



Selected Findings

- **Hardware** companies pay more attention towards sustainability demands and material costs
- **Retail oriented players** fear that the economic turmoil will affect their business model
- Leading **integrators** focus on organizational development after a M&A-heavy period
- **Software** companies put investments into growth at the center of their attention

DS Year 2022 Summary

1. The industry had a **strong year 2022**
 - Post pandemic effects, but also new investments as major driving forces
2. The **outlook is cautious**
 - Post pandemic catch-up is slowing, but underlying digital technology growth is solid
3. **Top 3 challenges** signal further growth
 - Investments
 - Organizational development
 - Recruitment
4. The **negative effects** of the pandemic seem to be **under control**
 - Material costs not the major headache anymore

Purpose of the index

Feeling the pulse of a rapidly changing business landscape

Quarterly assessing the current market sentiment and business expectations for the coming six months

Providing guidance and benchmark

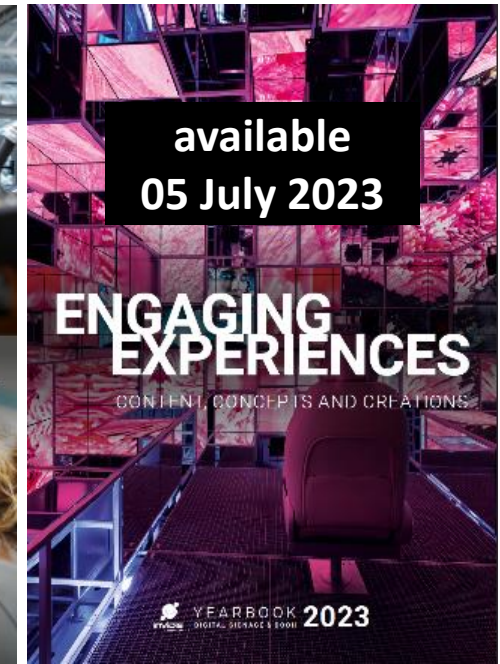
The index follows the well-established PMI concept and is therefore compatible with other industry PMI indices

A global instrument

As result of our comprehensive database, the sentiment can be tracked by region (countries, regions), market player (manufacturer, distributor, wholesale)

Participate

It only takes 5 minutes - we need your support
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Digital Signage Summit Europe

5-6 July 2023
Munich, Germany

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digital signage summit europe

Join us at DSS Europe

a joint-venture of invidis consulting and Integrated Systems Events

On top of engaging experiences invidis presents a wide range of topics most relevant in changing and shaping digital signage and DooH.

Additional key agenda themes will include:

Green Signage

Sustainable digital signage solutions and operations has become a necessity across much of EMEA. This will soon become a global requirement. We will analyse and discuss how technology providers can offer more energy efficient solutions, offer global on-site services, establish business models for refurbished hardware and develop circularity before recycling.

Software

Digital Signage platforms are evolving from monolithic software to modular managed services for content, data, network and device management – in the best cases in real-time and AI enabled. DSS Europe will focus on the tectonic changes in architecture, software development and new business models.

IT Security

In 2021 third-party software like digital signage platforms were responsible for 14% of all successful cyber-attacks. Penetration tests, security certifications and insurance coverage have become essential topics also for digital signage and DooH. DSS Europe will discuss best practice and present the latest trends.

Business Critical

Digital Signage has become business critical in various vertical markets. DSS Europe is the platform to learn and discuss about latest vertical trends and how signage is becoming indispensable for operations and user experiences.

Disrupting Technologies

Displays, LED, projectors, media players – digital signage is much more than visual solutions and PCs. DSS Europe is the platform to learn and get your hands of innovative and potentially disrupting technology connecting and complementing established solutions.

Yearbook Launch and Exclusive Market Insights

Widely referred to as the industry bible, the invidis yearbook is the industry reference point and annually launched at DSS Europe. Be the first to get a freshly printed copy with access to exclusive market data.

Standards

invidis launched various initiatives for more standards in the industry in cooperation with partners. DSS Europe will be the platform for discussing results and establishing new standard initiatives. Join the discussion to shape the future of the industry.

Best in Class Networking

There is probably not a better place than in-person events to network and DSS Europe offers two full days of networking in an exclusive and relaxed atmosphere conveniently located at Munich airport.

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