

May/June 2014

Belgium | The Netherlands | Luxemburg

26th of May 2014

DBCI



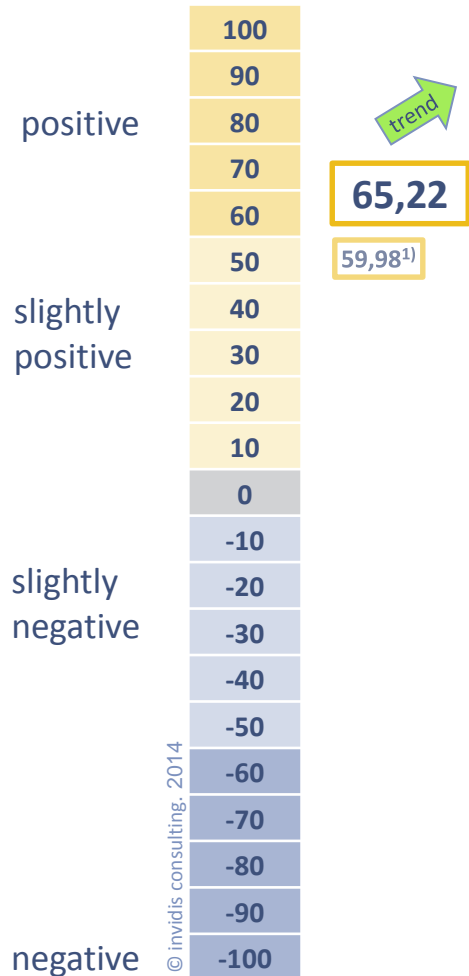
Digital Signage & DooH
Business Climate Index

The pulse of the Digital Signage
and DooH industry



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 Very positive business sentiment and good expectations in Benelux



- The digital Signage Business Climate Index Benelux has been polled for the second time in 2014. The Index has increased by over 5 base points to reach 65 base points, reflecting the current positive business sentiment of the Digital Signage industry in Benelux
- The industry shows an increased satisfaction with the current business situation as over 90% of all participants answered with “good” or “satisfactory”
- The expectations for the next six months are very good as almost 75% of all polled companies see the future “more favorable”
- The first quarter in 2014 was very good for the Digital Signage industry in Benelux. Many projects from the second half of 2013 are now being rolled out or finalized
- After a rather quiet second quarter the third and fourth quarter of 2014 is expected to be again very strong, as many interesting tenders are currently on the market and up for grabs

Survey facts

- Participants: n=23
- Region: Benelux
- Time frame: 2014 calendar weeks 19 &20

Fig. 1: DBCI Benelux May/June 2014, n=23
1) DBCI Benelux March/April 2014

   Rising satisfaction with the current business situation in Benelux

Question: How do you rate the current business situation for your products / services in the field of Digital Signage?

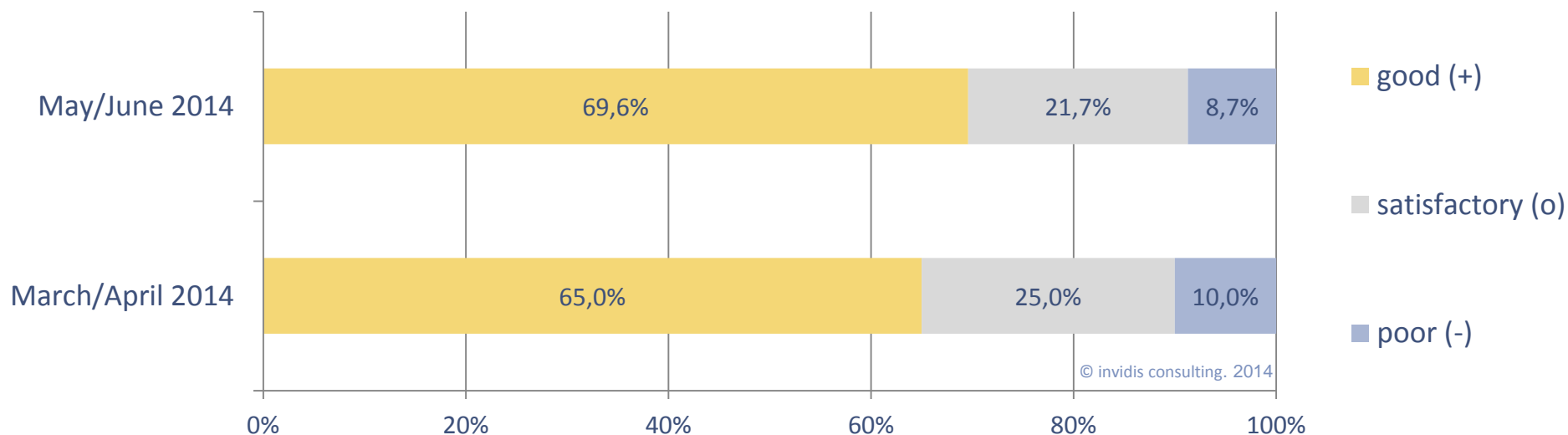


Fig. 2: DBCI Benelux May/June 2014 "business situation", n=23

   Very positive outlook for the second half-year of 2014

Question: What are your expectations for the next six months?

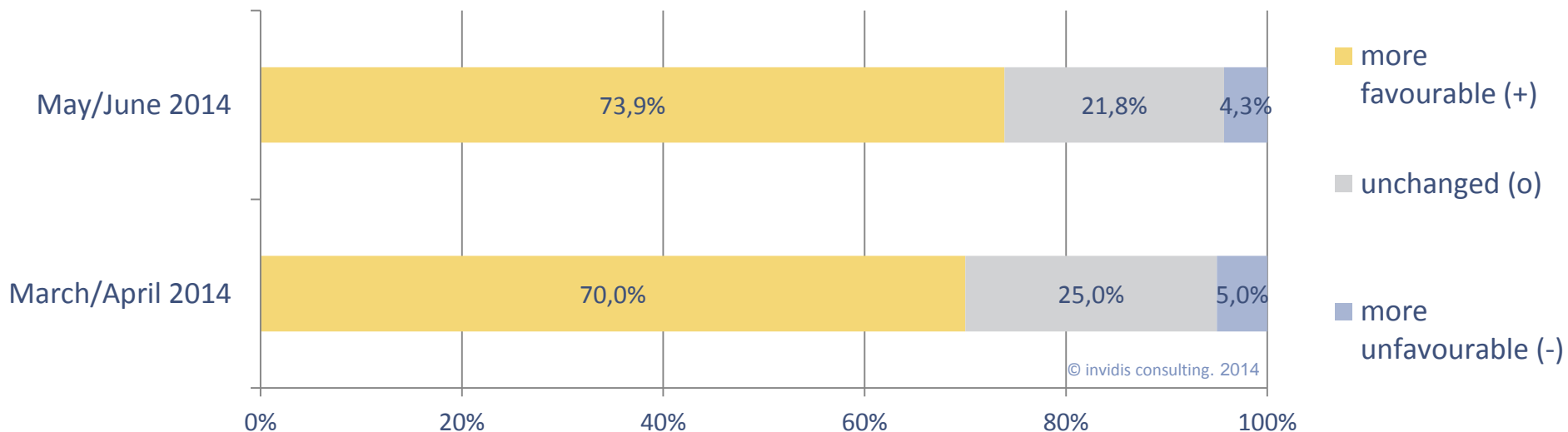


Fig. 3: DBCI Benelux May/June 2014 "business expectations", n=23



DBCI May/June 2014

Additional Questions

   Customer demand | Combination of Digital Signage and audio not yet in demand

Question: “How will the customer demand evolve for the Combination of Digital Signage and audio (e.g. in-store radio) within the next 12 months?”



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■ strong growth ■ growth ■ remain stable ■ decline ■ strong decline

Fig. 4: DBCI Benelux May/June 2014 “customer demand audio”, n=21

- The combination of Digital Signage and audio is still in its infancy. These in Europe traditionally rather separated segments are moving closer to each other driven by new technological innovations. However, approximately ¾ of all polled companies see no change or a decline in the customer demand for such solutions
- The customer yet has to see the benefits of a combination of both media. Moreover successful use cases are rare. However this will change in the next 12 to 18 months as more and more companies from the audio background move into the field of Digital Signage



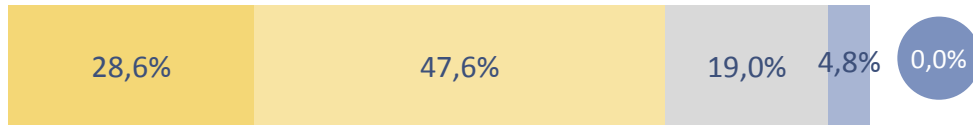
Source: Barix



Source: echion

Customer demand | High demand for the integration of mobile devices

Question: “How will the customer demand evolve for the integration of mobile devices in Digital Signage installations (e.g. Tablets) within the next 12 months?”



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■ strong growth ■ growth ■ remain stable ■ decline ■ strong decline

Fig. 5: DBCI Benelux May/June 2014 “customer demand mobile integration”, n=21

- The integration of mobile devices will be a hot topic in the Digital Signage industry in Poland within the next 12 to 18 months. Almost 70% of all polled companies see a growing demand from the customer for this solution
- Particularly for a direct customer engagement at the POS like in banks or car dealers more and more mobile devices are integrated in existing Digital Signage systems and for new projects they are already factored in before the system is rolled out
- However the creation of multi channel content still is a demanding issue for all players involved



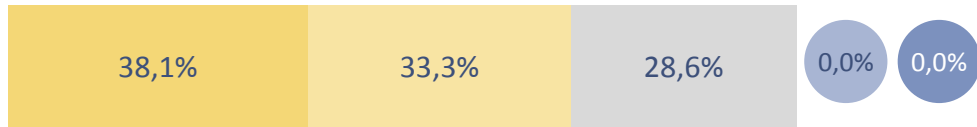
Source: Wincor



Source: Wincor

   Customer demand | The trend goes to interactive solutions at the POS

Question: “How will the customer demand evolve for Interactive Digital Signage solutions at the POS within the next 12 months?”



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■ strong growth ■ growth ■ remain stable ■ decline ■ strong decline

Fig. 6: DBCI Benelux May/June 2014 “customer demand interactive POS solutions”, n=21

- Interactive Digital Signage installations at the POS will be in high demand from customers in the next 12 months. Almost ¾ of the survey participants see good potential for growth in this sector
- In Retail the still most important vertical market for Digital Signage the trend is moving from only depictive systems to installations that will engage the customer directly and make the shopping experience more entertaining
- Here the DS Software is only distributing and managing the content which is often based on an existing web store



Source: xplace



Source: Globus

 DooH gross revenues | Robust Q1 and very good expectations for the full year

Question: “How did the gross advertising spendings develop in the first quarter of 2014 compared to the same period in the previous year and how will the full year turn out to be ?”

- The first quarter in 2014 was fairly positive for the Digital-out-of-Home market in Benelux. 50% of the surveyed companies (media owners, agencies and marketers) have registered a growth in gross revenues compared to the same periode in the previous year.
- However the full year 2014 will see a definit increase in gross rrevenues compared to 2013 as even over ¾ of all market participants are calculating with a growth and only 7% expect a decline

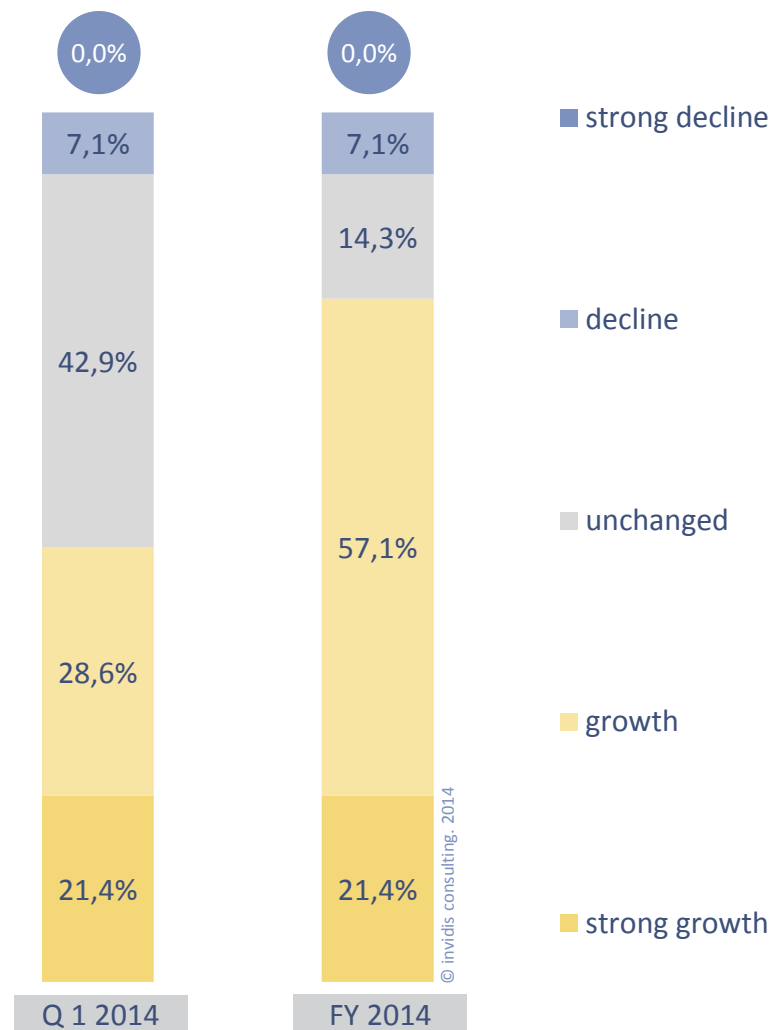


Fig. 7: DBCI Benelux May/June 2014 “gross advertising revenues”, n=14

Roadmap 2014 & Contact

2013
January
February
March
April
Mai
Jun
July
August
September
October
November
December

← **Jul./Aug. | 28.07.**

← **Sep./Oct. | 18.09.**

← **Nov./Dec. | 24.11.**

- The next survey will take place in calendar weeks 28 & 29 of 2014.
- The next planned publication date will be the 28nd July 2014.
- The DBCI is polled by invidis consulting and published in cooperation with OVAB 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 2014. For further information please contact Daniel Russell.

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Save the Date!
17. - 18. September
2014



digital signage

8th MUNICH CONFERENCE

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