

Netherlands

Belgium Luxembourg

November | December 2014

**DBCI**



Digital Signage & DooH  
Business Climate Index

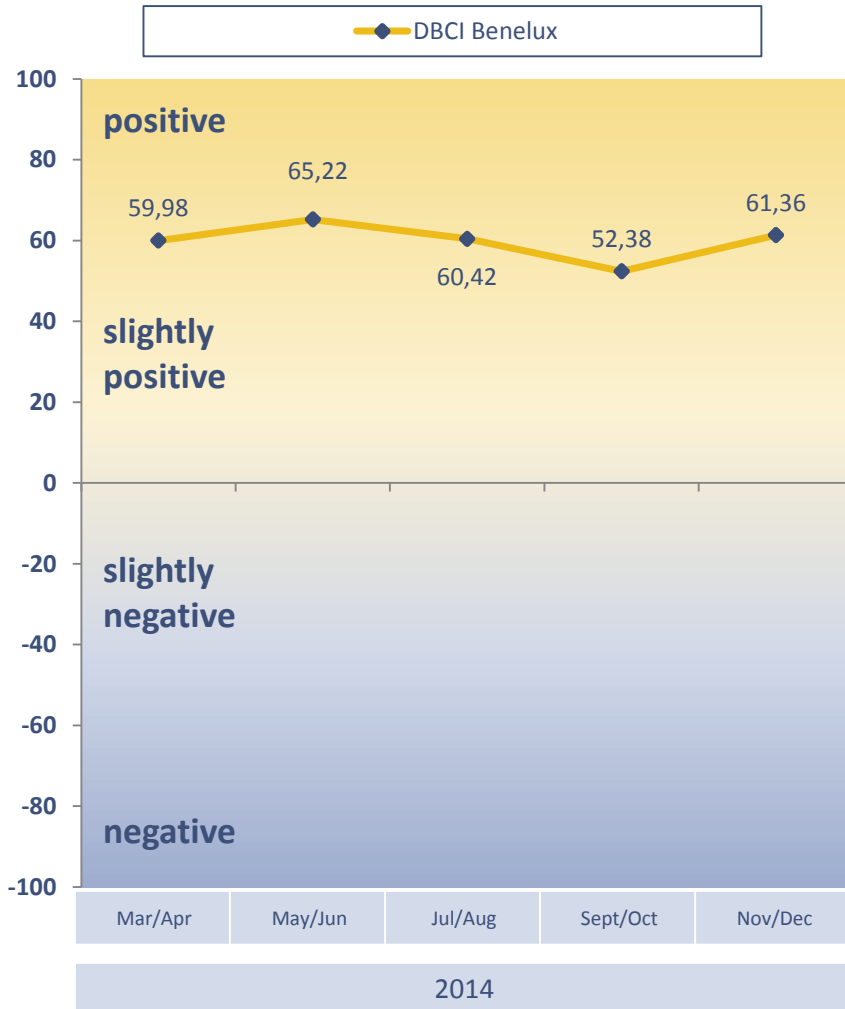
The pulse of the Digital Signage  
and DooH industry



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2014 NL 600

## Digital Signage market has good expectations for 2015



- The Digital Signage Business Climate Index (DBCI) in Benelux has increased since the last poll in September. The Index grew from 52,38 base points by 8,98 points and remains on the positive level
- The current business situation is very good, with the more favorable expectations for the next six months clearly increasing
- The general economy in the Benelux market has stabilized on a low growth level
- In the Digital Signage market the summer slump lasted longer than anticipated. However, the positive target for the general economy and the expected improvement of the labor market in 2015 has had a positive effect on the expectations for the new year

### Further research:

- The very high costs for UHD content has a dampening effect on the expectations for full UHD projects in the next year
- Falling hardware prices and availability of plug-and-play solutions have resulted in a high demand for entry-level Digital Signage

#### Survey facts

- Participants: n=22
- Region: Benelux
- Time frame: 2014 calendar weeks 46-47

Fig. 1: DBCI Benelux November/December 2014 „Index“, n=22

 Consistent satisfaction with the current business situation

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

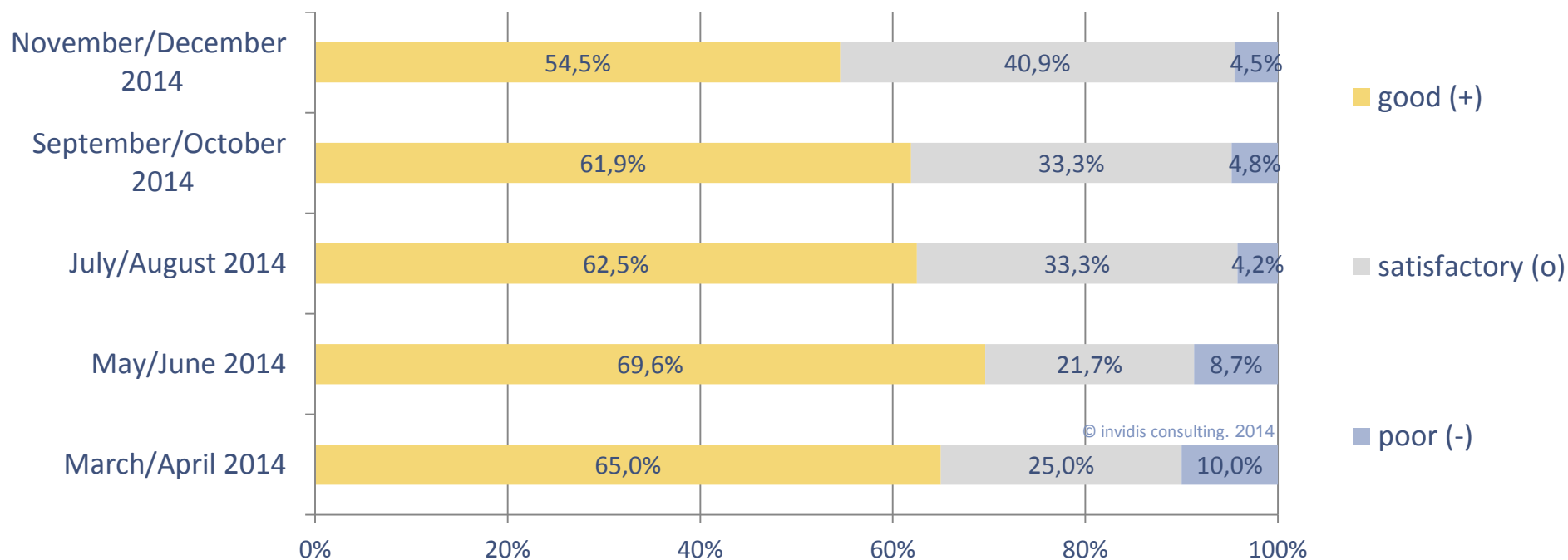


Fig. 2: DBCI Benelux November/December 2014 "business situation", n=22

 Optimistic outlook for the new year

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

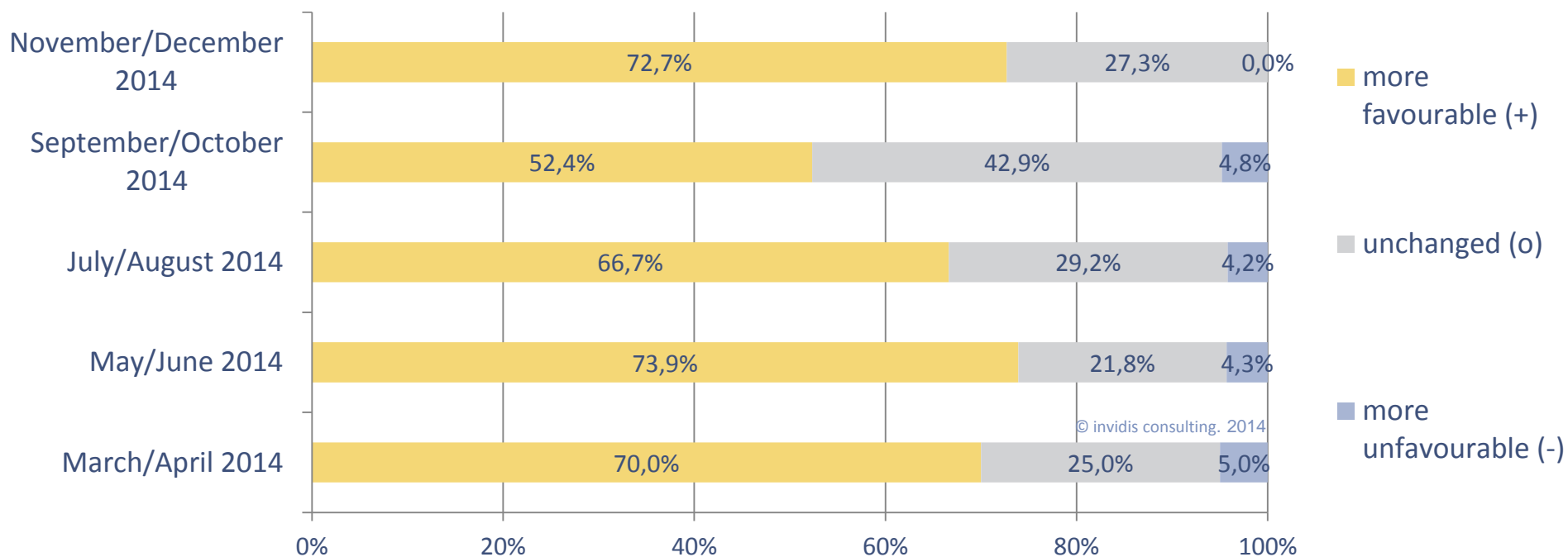
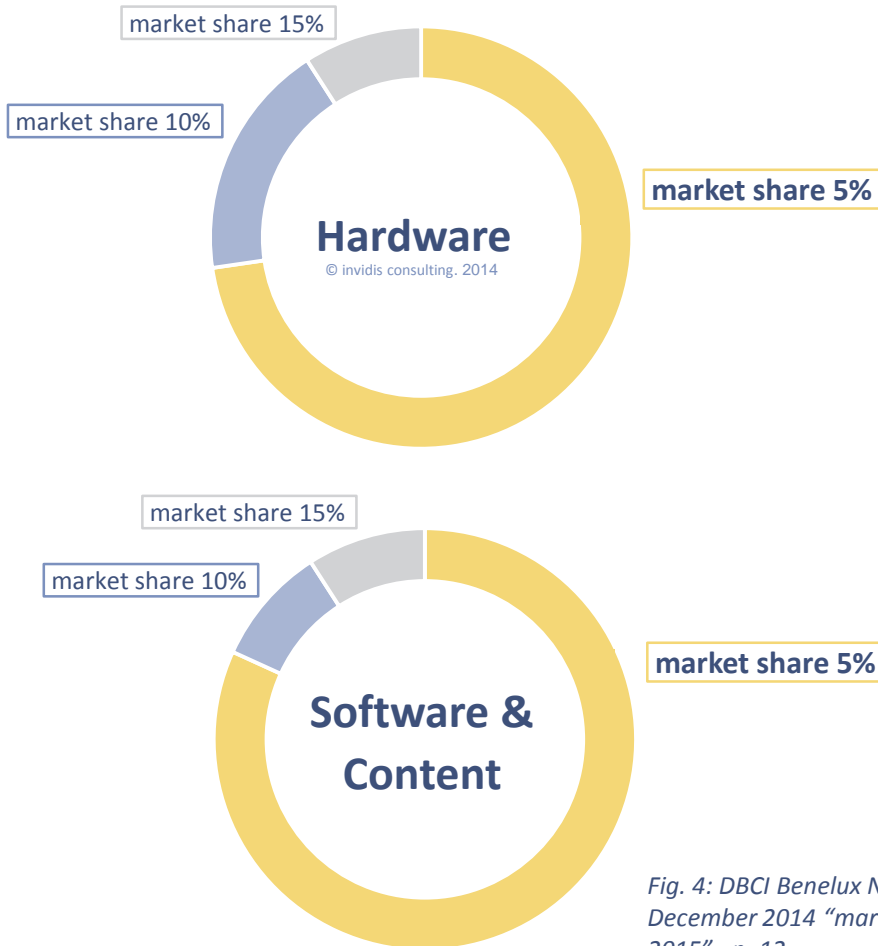


Fig. 3: DBCI Benelux November/December 2014 "business expectations", n=22

## Market share UHD products in Digital Signage projects 2015



*Question: How do you expect will the market for UHD products (displays, media player, software, content) evolve over the next 12 months? The market share will be at ...*

### 5% market share in 2015

Availability of cost effective UHD hardware (Displays/Media Players) will result in a growing demand within the next 12 to 18 months. However, the very high costs for UHD content has a dampening effect on the expectations for full UHD projects in the next year

Fig. 4: DBCI Benelux November | December 2014 "market share UHD 2015", n=12

Further research | Satisfactory demand for entry level Digital Signage

### Demand for entry-level products in Digital Signage projects 2014

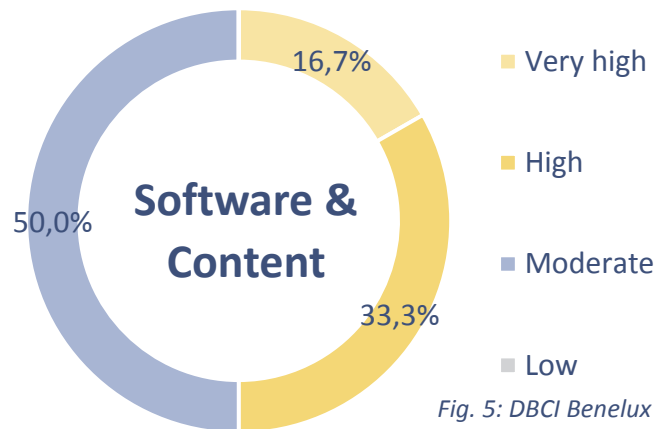
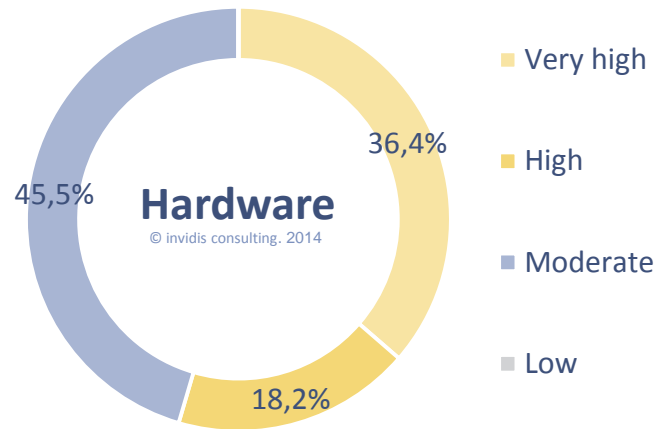


Fig. 5: DBCI Benelux November | December 2014 "market share UHD 2015", n=12

**Question:** How much demand did your customers have for entry-level products (hardened consumer displays, cost effective media players, standard software, content shops & templates) within the last 12 months?

#### Satisfactory demand for entry-level signage

Falling hardware prices and availability of plug-and-play solutions have resulted in a growing demand for entry-level Digital Signage solutions in 2014. However, the customers are more inclined to use higher performing products with software and content



Further research | DooH industry favours traditional nomenclature

**Question:** Which nomenclature do you prefer for Digital-out-of-Home?

66,7% of all polled companies are favoring the nomenclature **Digital-out-of-Home (DooH)** for the media

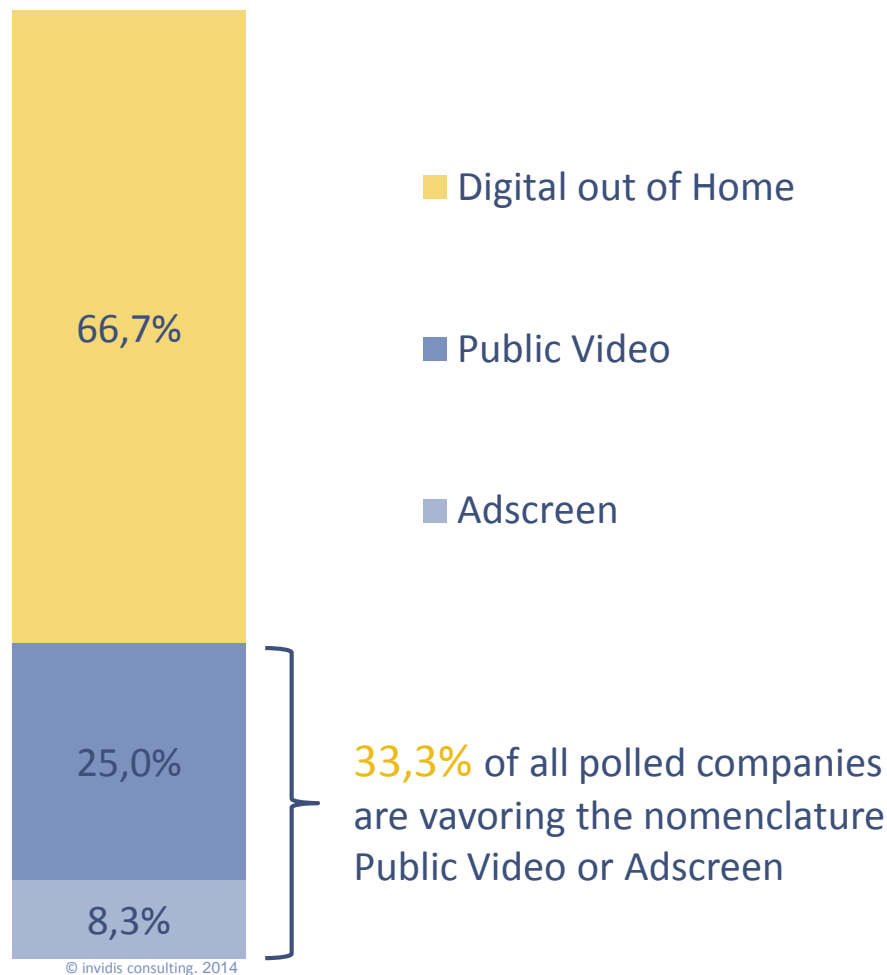


Fig. 6: DBCI Benelux November | December 2014 "favoured nomenclatura DooH", n=12

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Roadmap 2015 & Contact

2015	
January	← Jan./Feb.   02. 02.
February	
March	← Mar./Apr.   23. 03.
April	
Mai	← May/Jun.   18. 05.
Jun	
July	← Jul./Aug.   20. 07.
August	
September	← Sept./Oct.   17. 09.
October	
November	← Nov./Dec.   26. 11.
December	

- The next survey will take place in calendar weeks 3-4 of 2015.
- The next planned publication date will be the 2<sup>nd</sup> February 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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