

Netherlands
Belgium,
Luxembourg
January | February 2015

DBCI



Digital Signage & DooH
Business Climate Index

The pulse of the Digital Signage
and DooH industry



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2015 NL 100

Digital Signage market with a positive start in 2015

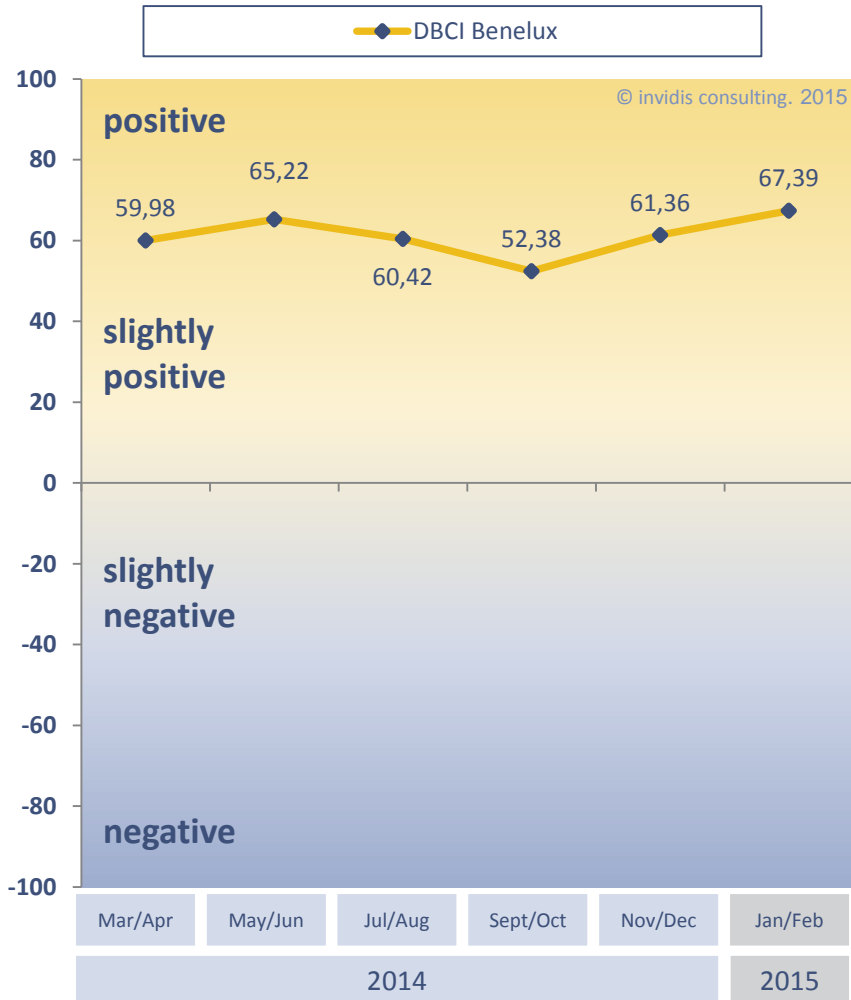


Fig. 1: DBCI Benelux January/February 2015 „Index“, n=23

- The Digital Signage Business Climate Index (DBCI) in Benelux has increased since the last poll in November. The Index grew from 61,36 base points by 6,03 points to reach 67,39 base points.
- The current business situation has markedly increased since the last survey, with the outlook for the next six months continuously optimistic
- The Digital Signage market in Benelux can look back on a satisfying year 2014. In spite of the volatile general economic and political situation growth in the last year was stable with a very successful fourth quarter.

Further research:

- 72,8% of all companies in the Digital Signage market have hired new staff in 2014
- In 2015 retail (POS) will again give an important impulse to the Digital Signage industry. “Smart” solutions and the keywords Omni-channel & mobile integration, interactivity and outdoor/high brightness will further stay in the focus.
- Also entry level products catering the small and medium business market will have a strong impact on revenues

Survey facts

- Participants: n=23
- Region: Benelux
- Time frame: 2015 calendar weeks 3-4

Increased 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?

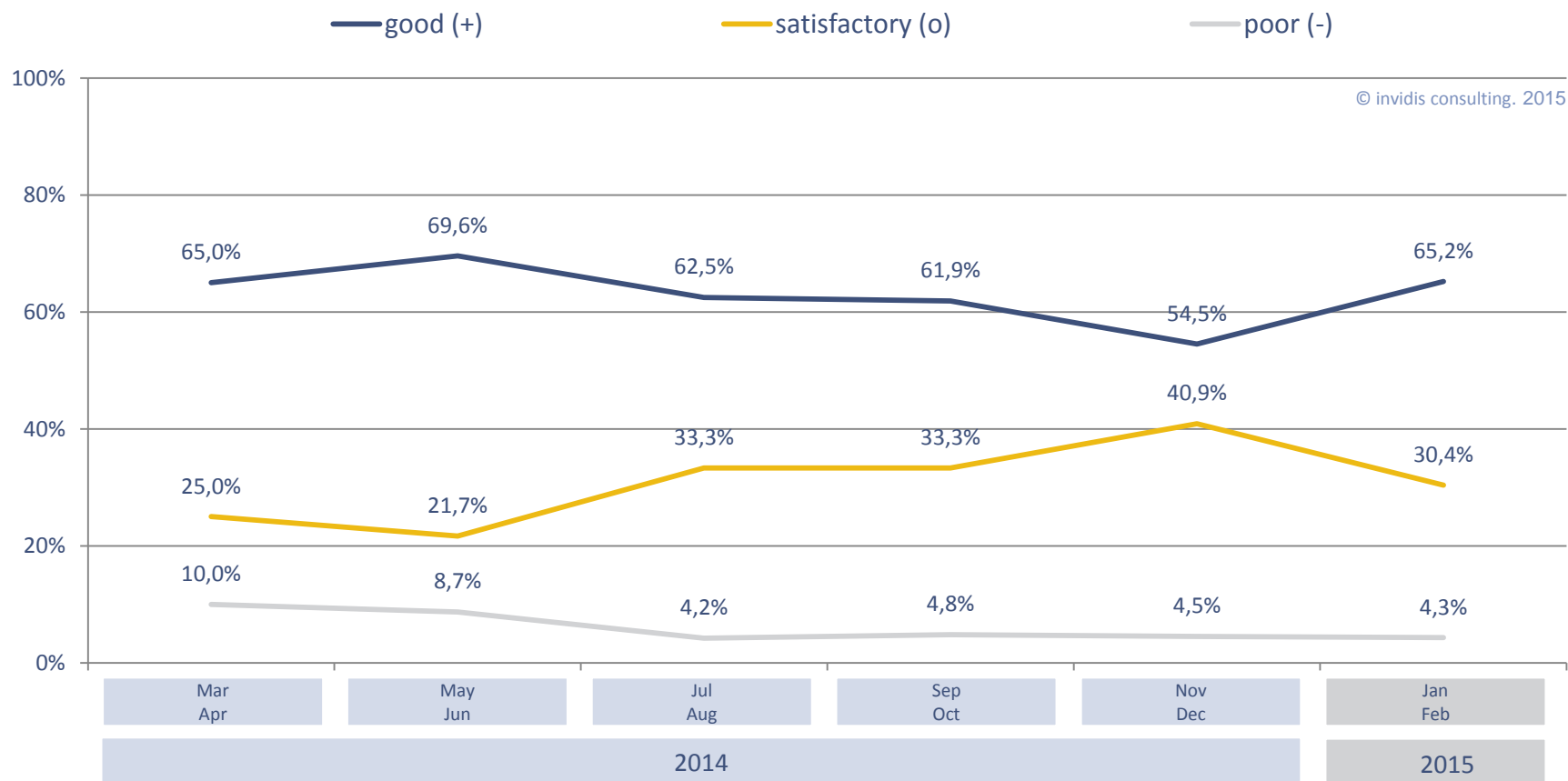


Fig. 2: DBCI Benelux January/February 2015 "business situation", n=23



Consistent optimistic outlook for the new year

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

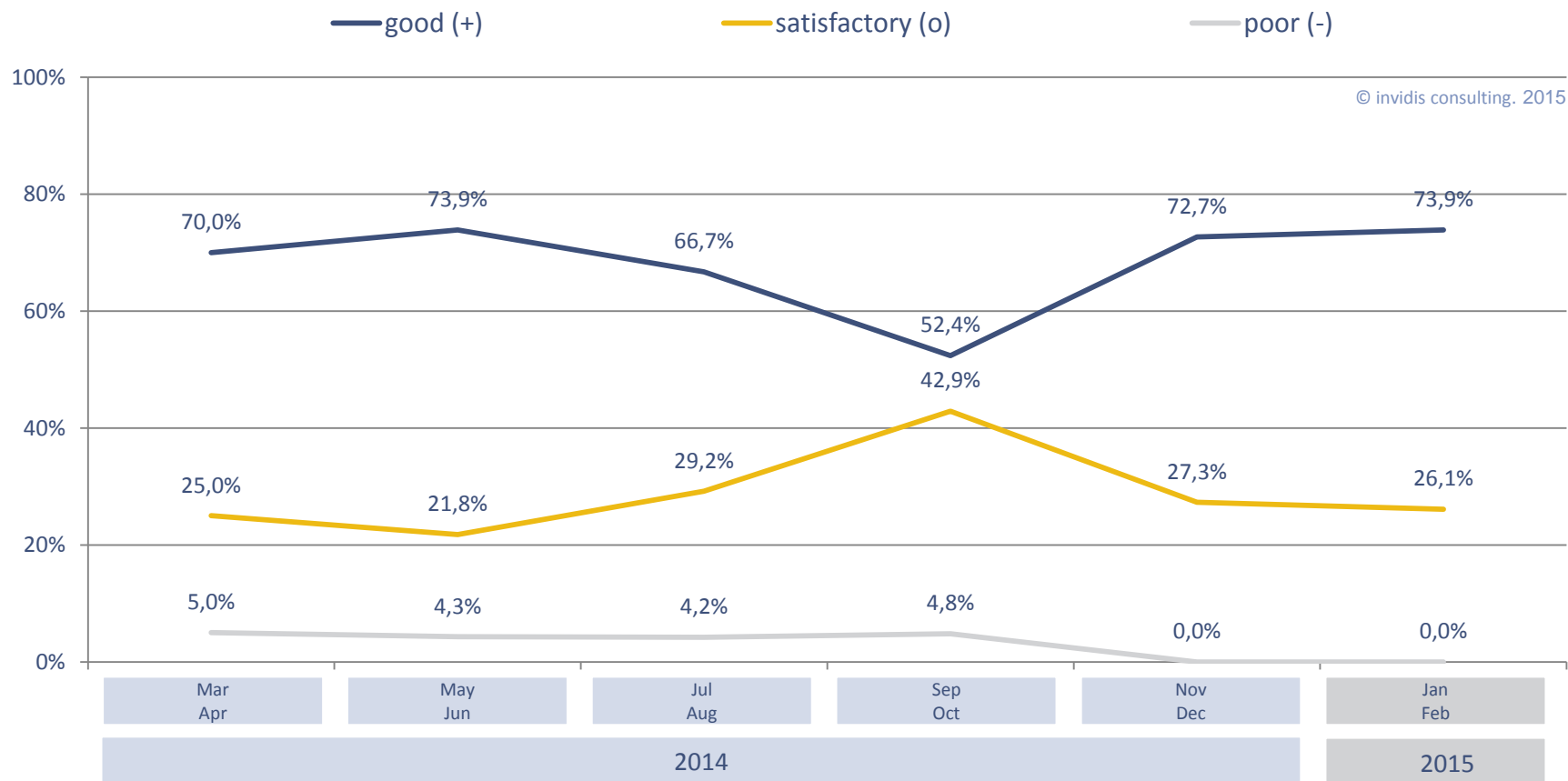


Fig. 3: DBCI Benelux January/February 2015 "business expectations", n=23

 Hirings 2014 | Digital Signage industry created new jobs in 2014

- **72,8%** of all companies in the Digital Signage Market have hired new staff in the last year
- In the year 2014 between **50 to 70 new jobs** were created in the Digital Signage market in Benelux
- As a whole there is a high demand for qualified personnel. Due to a growth strategy and re-structuring the demand for personnel on a management level with new qualifications is very high (e.g. key account and project manager)
- The increasing expansion in vertical markets leads to a demand for more professionals from different industry branches by Digital Signage companies

Company growth in new jobs created 2014

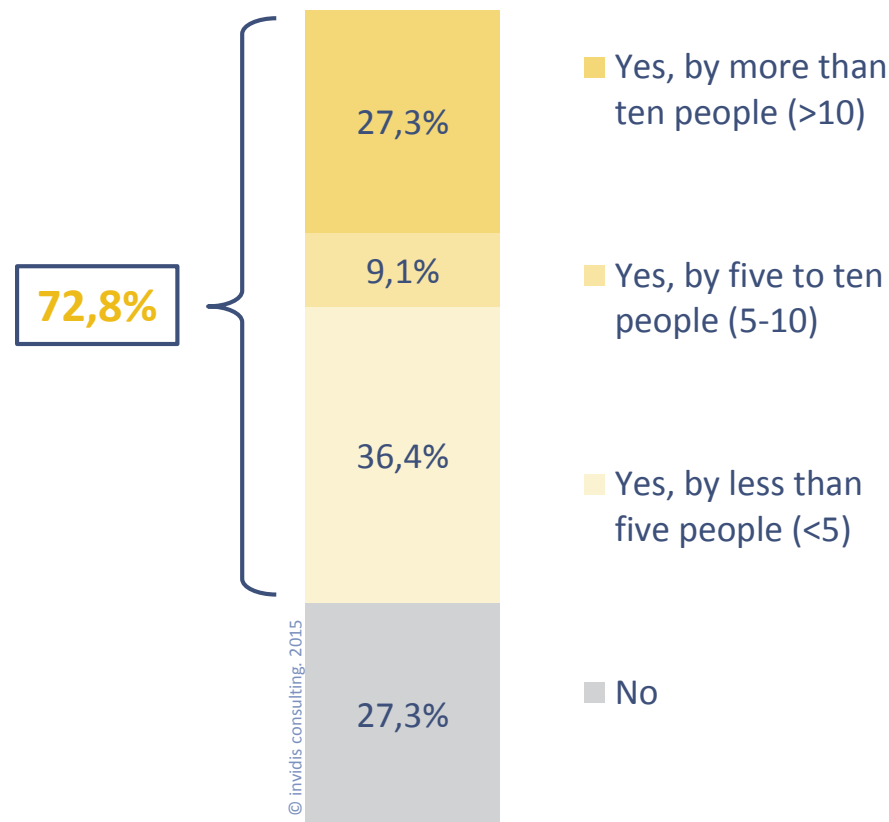


Fig. 4: DBCI Benelux January/February 2015 "Hirings 2014", n=19

Roadmap 2015 & Contact

| | |
|-----------|----------------------------------|
| 2015 | |
| January | |
| February | |
| March | ← Mar./Apr. 2015/03/30 |
| April | |
| May | ← May/Jun. 2015/05/26 |
| Jun | |
| July | ← Jul./Aug. 2015/07/27 |
| August | |
| September | ← Sept./Oct. 2015/09/21 |
| October | |
| November | ← Nov./Dec. 2015/11/23 |
| December | |

- The next survey will take place in calendar weeks 10-11 of 2015.
- The next planned publication date will be the 30th March 2015.
- 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 2015. For further information please contact Daniel Russell.

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