

Netherlands
Belgium,
Luxembourg
May | June 2015

DBCI



Digital Signage & DooH
Business Climate Index

The pulse of the Digital Signage
and DooH industry

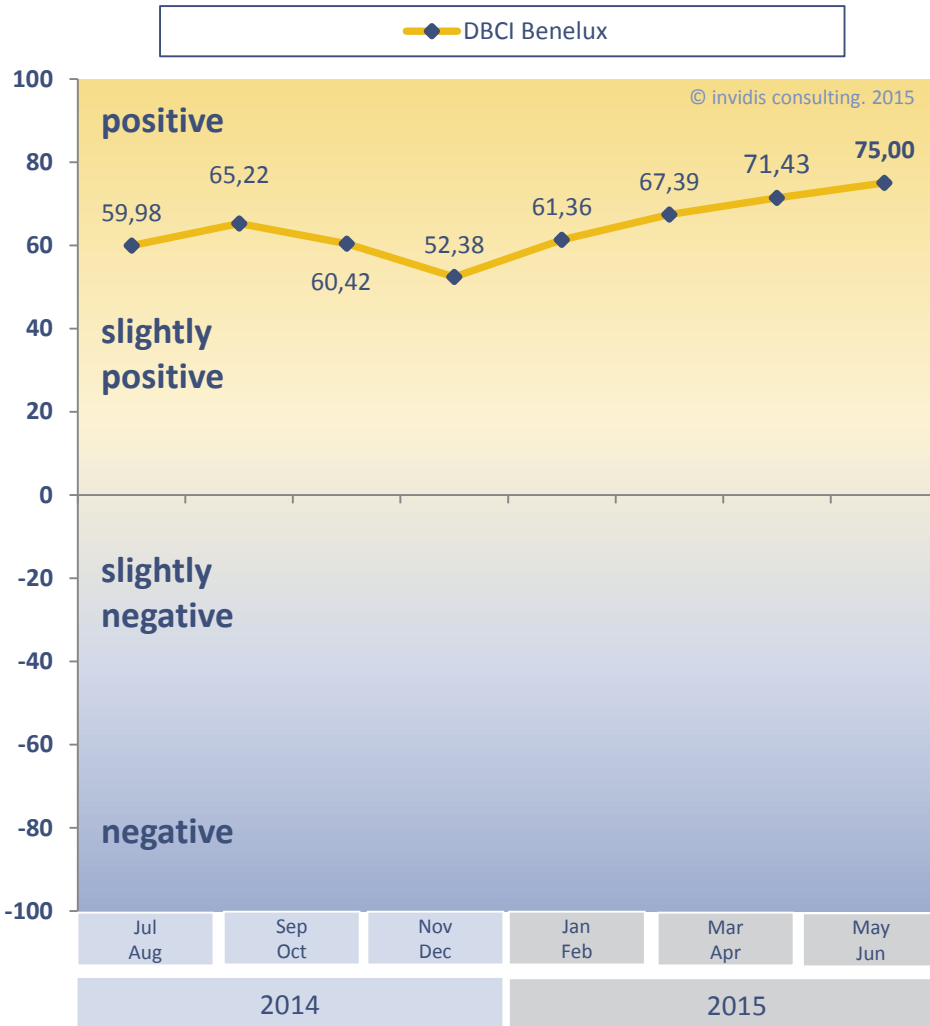


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CONSULTING

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2015 NL 300



Digital Signage market continues the positive trend



- The Digital Signage Business Climate Index (DBCI) in Benelux has further increased since the last poll in January. The Index grew from 71,43 base points by 3,57 points to reach 75,00 base points.
- The DBCI reflects the very positive current business sentiment of the Digital Signage industry in Benelux
- Almost 90% of the polled companies rate their current business climate with *good*. While just slightly more than 10% see their situation as *satisfactory*.
- However, with 62% the answers for more favourable business conditions within the next six month has declined. More companies than in the first quarter expect no big movement in the market until the end of the year.

Further research:

- There are high hopes for the market potential for LED display technology. The Digital Signage and Digital-out-of-Home companies polled in the DBCI all see a high to very high potential for LED display technology in competition to LCD displays within the next 24 months.

Participants: n=23; Region: Benelux; Survey Period: 2015 calendar weeks 18-19

Fig. 1: DBCI Benelux May/June 2015 „Index“, n=23

Further increasing 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?

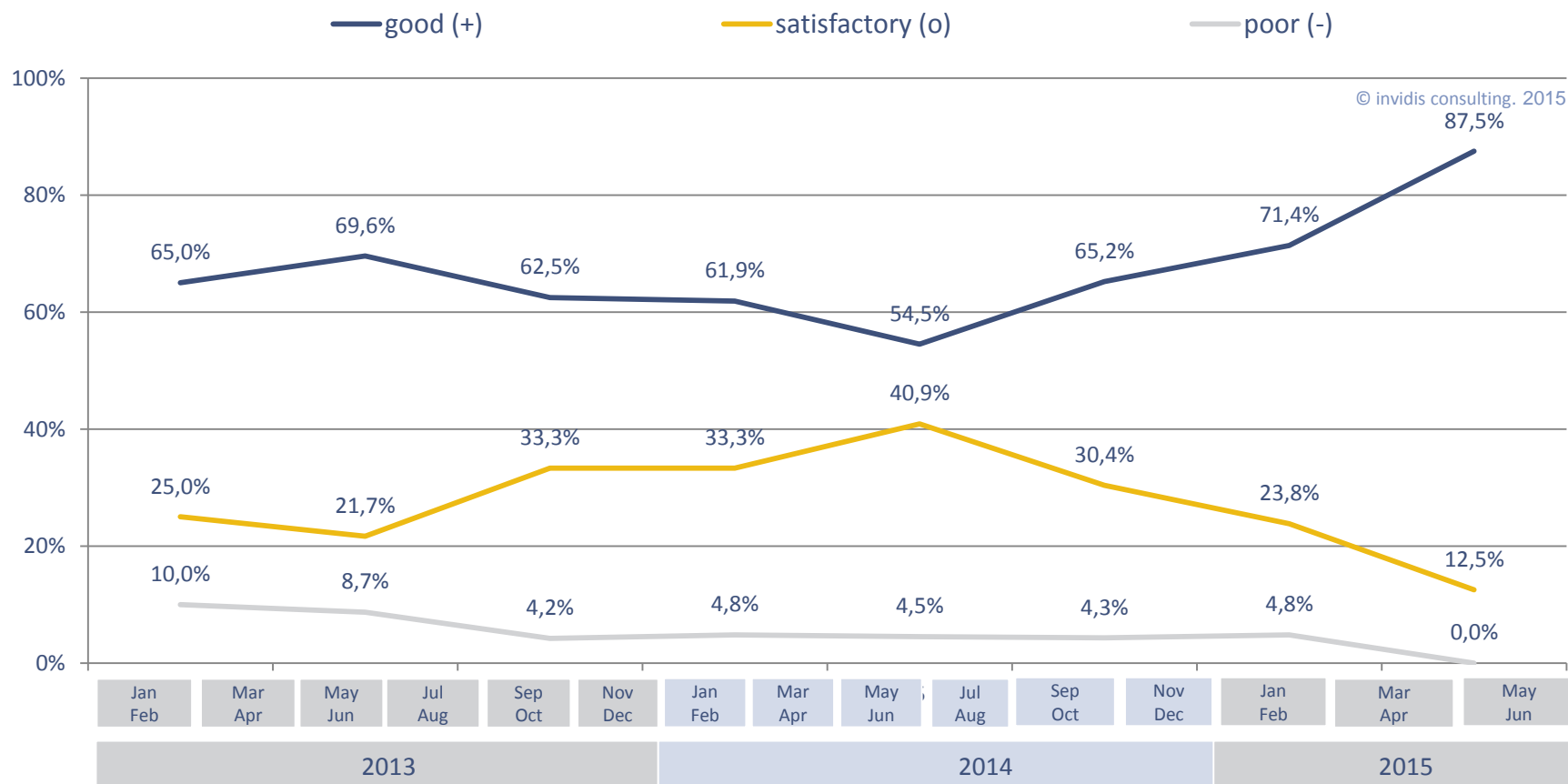


Fig. 2: DBCI Benelux May/June 2015 "business situation", n=23



More conservative outlook until the end of 2015

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

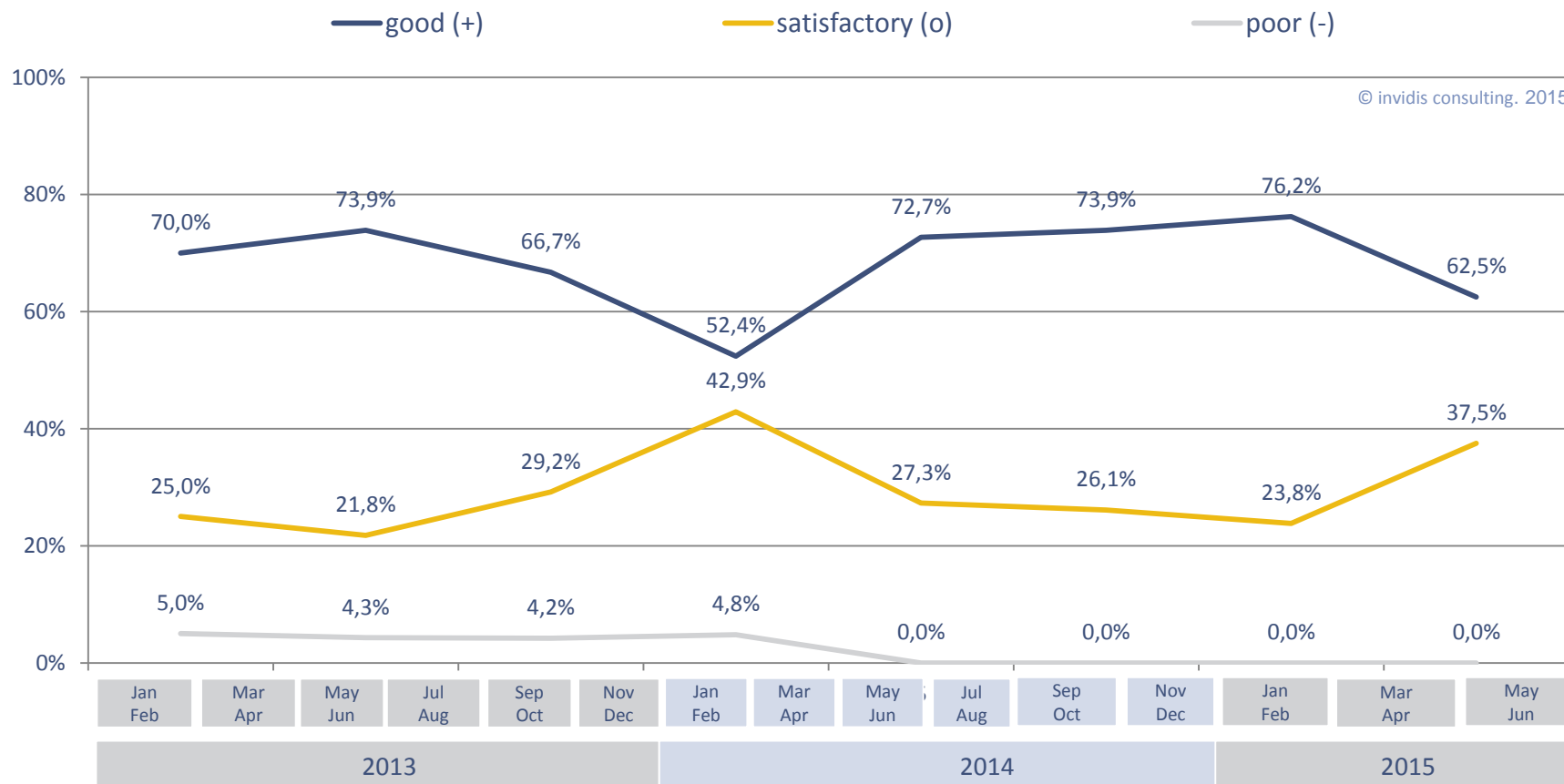


Fig. 3: DBCI Benelux May/June 2015 "business expectations", n=23

 High hopes for market potential of LED display technology

Question: LED display technology has developed positively over the last years. Improved quality, smaller pixel pitch and lower prices have increased the acceptance in the market. How high do you see the potential for LED display technology in competition to LCD display technology in the next 24 months?

- The Digital Signage and Digital-out-of-Home companies polled in the DBCI all see a high to very high potential for LED display technology in competition to LCD displays within the next 24 months
- Over the last years, improvements in LED display technology have resulted in a lower pixel pitch. Together with a rapid increase in competition and hence falling prices the market potential of LED display technology will further increase in the next years. The big market players like Samsung and LG have noted this trend and duly seek a fast market entrance.
- Still the survey shows the highest potential is attributed to outdoor installations. For indoor solutions the low viewing distance dictates a very low pixel pitch and hence high costs.

LED display technology outlook 2016

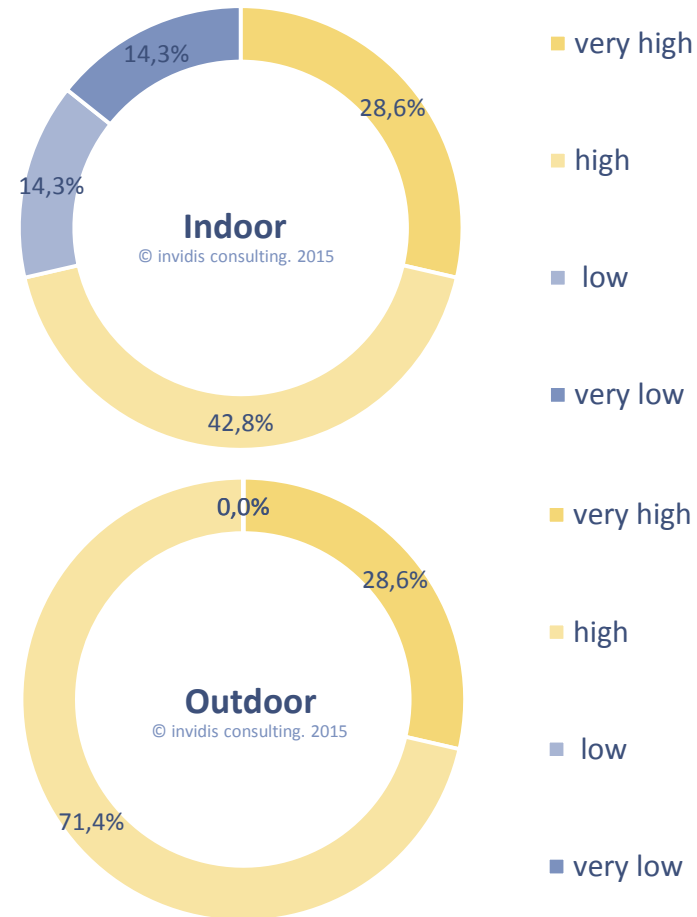


Fig. 4: DBCI Benelux May | June 2015 "LED display technology outlook 2016", n=19

Roadmap 2015 & Contact

| |
|-----------|
| 2015 |
| January |
| February |
| March |
| April |
| May |
| June |
| July |
| August |
| September |
| October |
| November |
| December |

← Jul./Aug. | 2015/07/27

← Sept./Oct. | 2015/09/21

← Nov./Dec. | 2015/11/23

- The next survey will take place in calendar weeks 27-28 of 2015.
- The next planned publication date will be the 27th July 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.

Contact:

Daniel Russell | Research Analyst
 invidis consulting GmbH
 Rosenheimer Str. 145e
 DE-81671 Munich
 Daniel.Russell@invidis.com
 Phone: +49 89 2000416-21
 Mobile: +49 151 62438503