

Netherlands
Belgium,
Luxembourg
July | August 2015

DBCI

OVAB Digital Signage & DooH
Business Climate Index

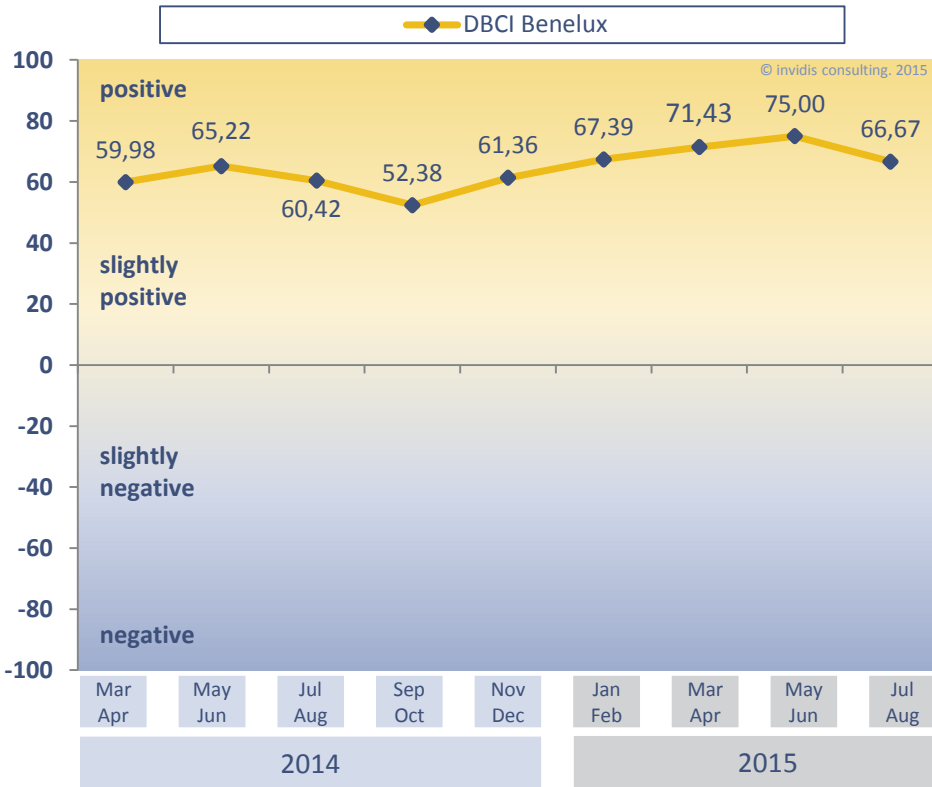
The pulse of the Digital Signage
and DooH industry



invidis research
2015 NL 400



Digital Signage market sees a slight correction in the summer



- The Digital Signage Business Climate Index (DBCI) in Benelux has decreased since the last poll in January. The Index fell from 75,00 base points by 8,33 points to reach 66,67 base points.
- While the current business situation is assessed more conservative by the market participants compared to May, the outlook for the future has become more optimistic

Further research:

- In 2014 approximately between 5% and 10% of all Digital Signage solutions or DooH campaigns were realized with the integration of mobile devices
- Within the next two years the market participants see the current situation changing. The market share of Digital Signage solutions or DooH campaigns using mobile integration will grow to on average of 10% to 15%.

Participants: n=23; Region: Benelux; Survey Period: 2015 calendar weeks 28-29

Fig. 1: DBCI Benelux July/August 2015 „Index“, n=21



10.-11. September 2015
Digital Signage Summit Europe in Munich
www.digitalsignagesummit.org



The current business situation is assessed more conservatively

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

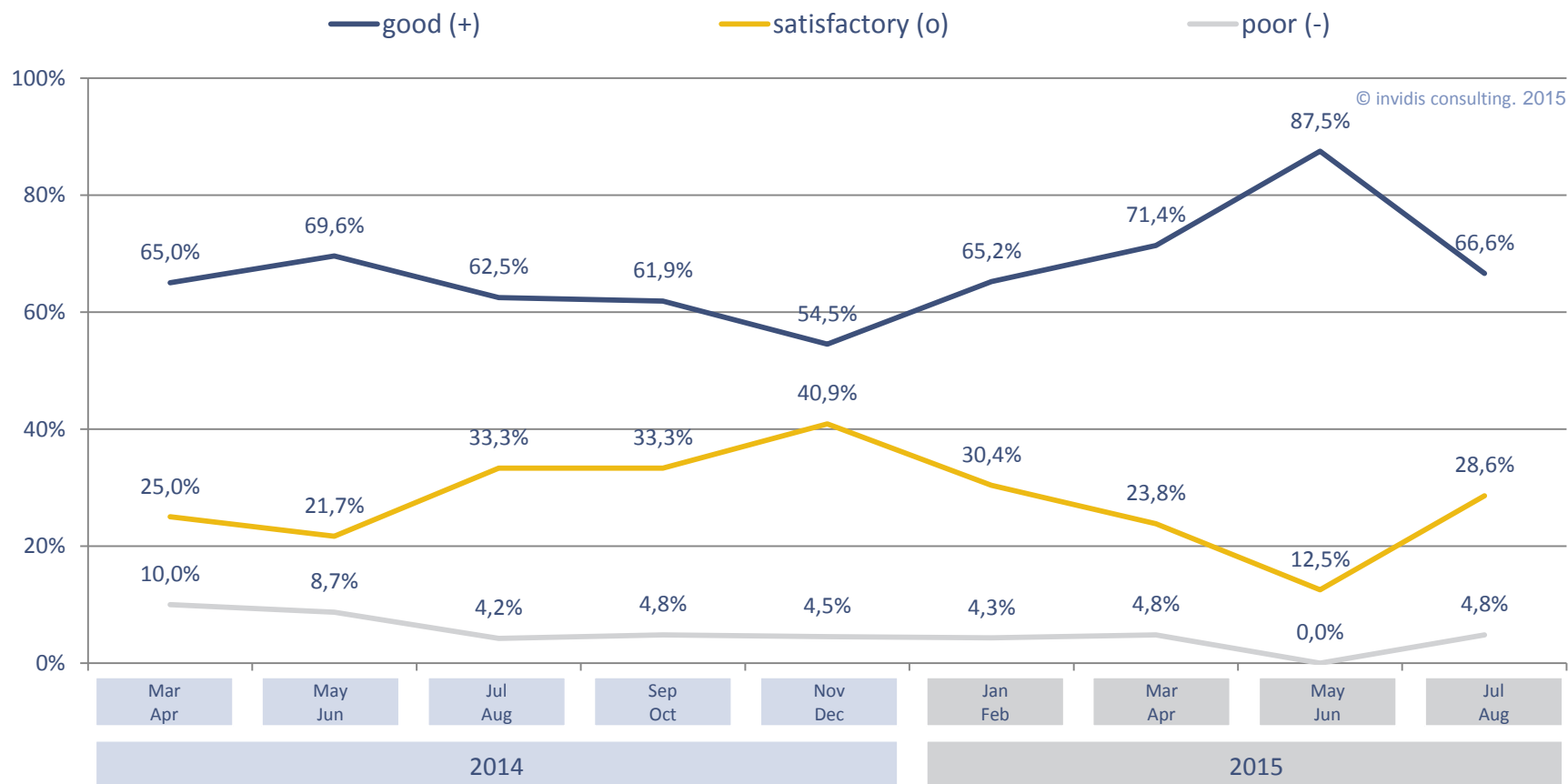


Fig. 2: DBCI Benelux July/August 2015 "business situation", n=21



The outlook for the near future is increasingly positive

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

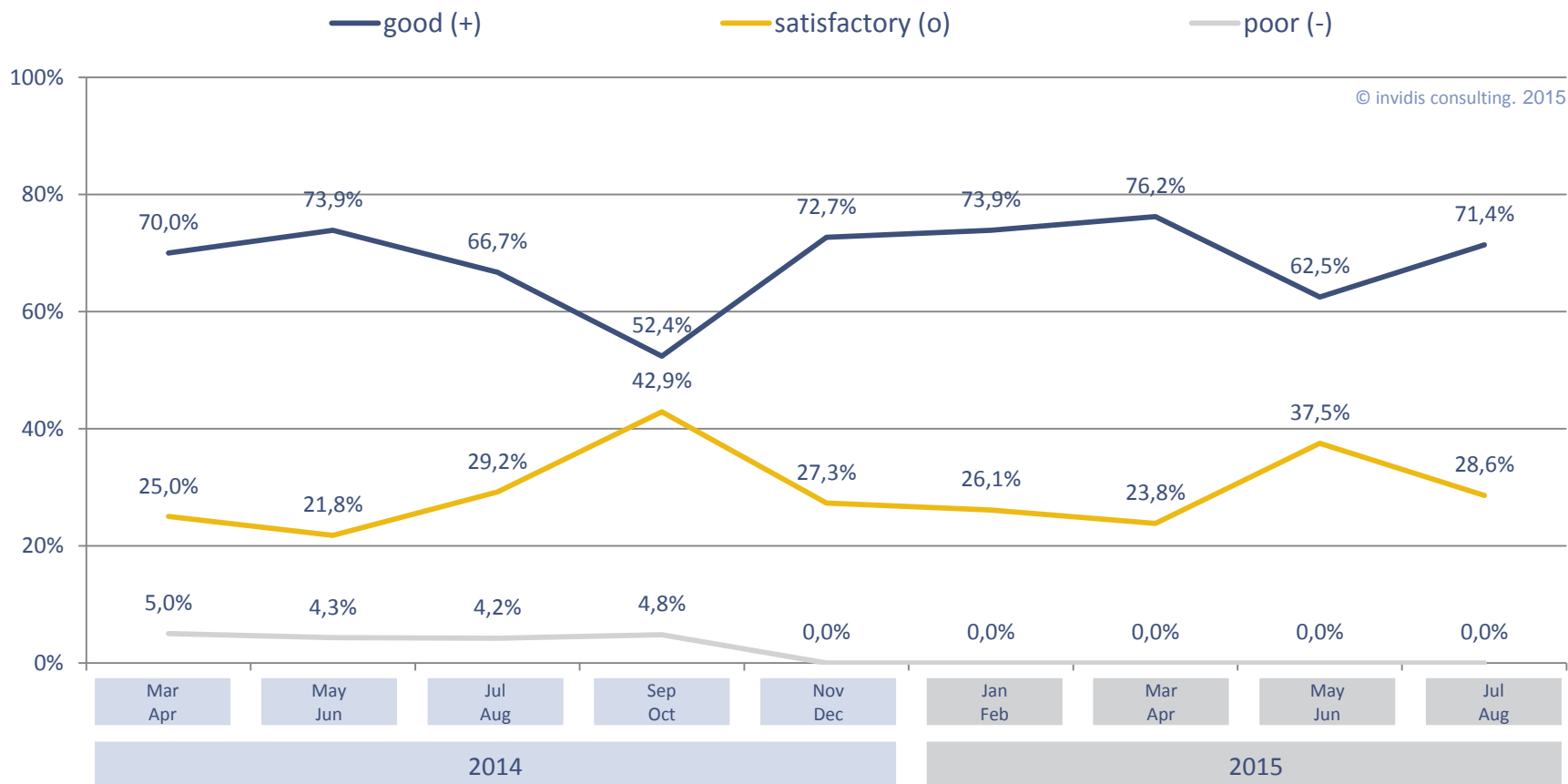


Fig. 3: DBCI Benelux July/August 2015 "business expectations", n=21

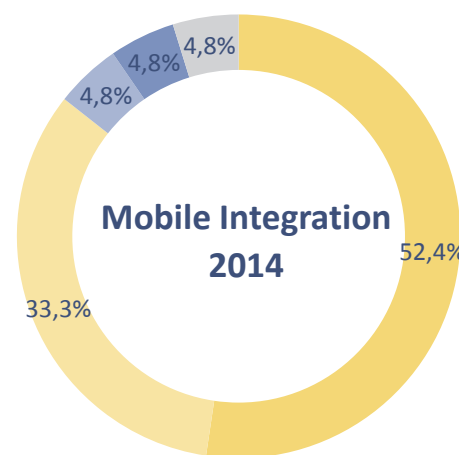
 Further research | Mobile integration is still in it's infancy

Question: How high was the percentage of Digital Signage installations or DooH campaigns with mobile integration you have realized in the last 12 months?

- Mobile integration is one of the buzzwords connected to the omni-channel retail concept within the digital transformation
- However, in 2014 still clearly less than 10% of all Digital Signage solutions or DooH campaigns were actively banking on integrating mobile devices
- Most installations or campaigns still rely on content which doesn't access the many interactive possibilities of the digital world, but rather is a digitized version of an analogue media format (i.e. poster)

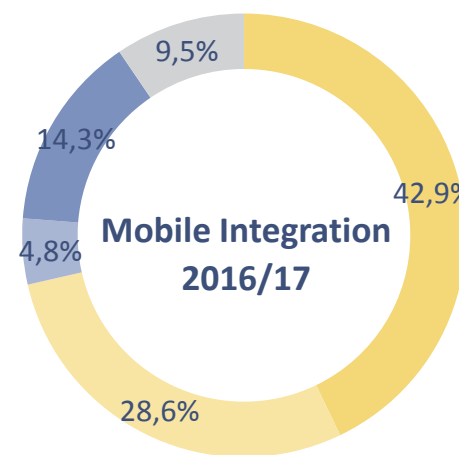
Question: How high do you expect the percentage of Digital Signage installations or DooH campaigns with mobile integration will be in 24 months?.

- Within the next two years the market participants see the current situation changing. The expectation is that in average between 10% and 15% of all of projects will be rolled out with mobile integration.



Market share of Digital Signage solutions with mobile integration in 2014

- less than 10%
- 10%
- 20%
- 30%
- more than 30%



Market share of Digital Signage solutions with mobile integration in 2016/17

- less than 10%
- 10%
- 20%
- 30%
- more than 30%

Fig. 4: DBCI Benelux July | August 2015 "mobile integration", n=21

Roadmap 2015 & Contact

- The next survey will take place in calendar weeks 35-36 of 2015.
- The next planned publication date will be the 21th September 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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2015
January
February
March
April
May
June
July
August
September
October
November
December

Sept./Oct. | 2015/09/21

Nov./Dec. | 2015/11/23

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