

Netherlands
Belgium,
Luxembourg

November | December 2015

DBCI

The pulse of the Digital Signage
and DooH industry



Digital Signage & DooH
Business Climate Index



invidis research
2015 NL 600

Digital Signage business sentiment starting a positive trend towards the end of the year

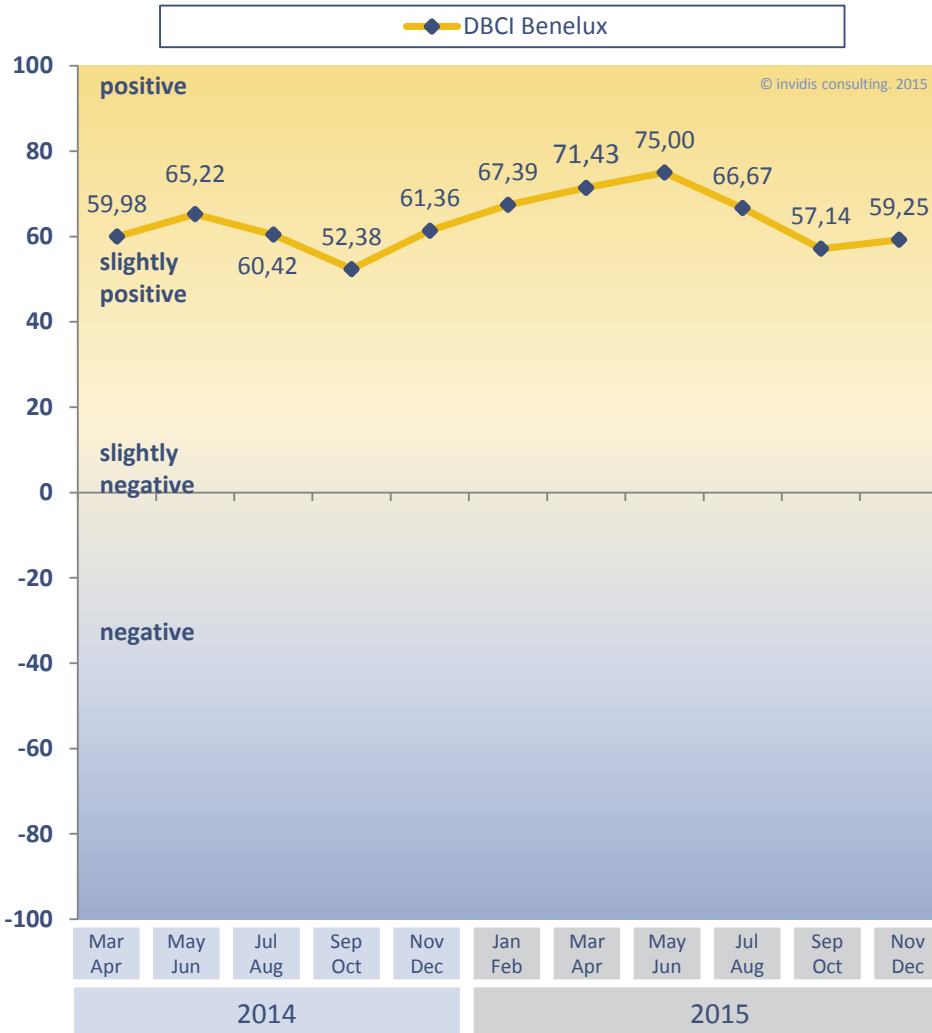


Fig. 1: DBCI Benelux November | December 2015 „Index“, n=97

- Since the last survey in September 2015 the Digital Signage Business Climate Index has increased by 2,10 base points from 57,14 base points to 59,125 base points.
- The satisfaction with the current business situation for products and services in the Digital Signage and Digital out of Home industry has further increased. While the negative assessment of the situation has declined.
- Particularly the optimism towards the near future saw a strong increase by almost 10%. Now 70% of all polled companies expect a *more favourable* situation for their business within the next six months.

Further research:

- The market leaders among the distributors in Benelux are Tech Data, Van Domburg Partners, Avnet and Aplusk. Between 40% and 60% of the market participants have worked with those competitors.
- 46% of the DooH market has seen a rise in bookings in the current year. The overall market is expected to register a healthy increase in the number of advertising bookings for 2015

Participants: n=97; Region: Benelux; Survey Period: 2015 calendar weeks 45-46



The current business situation Benelux is robust

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

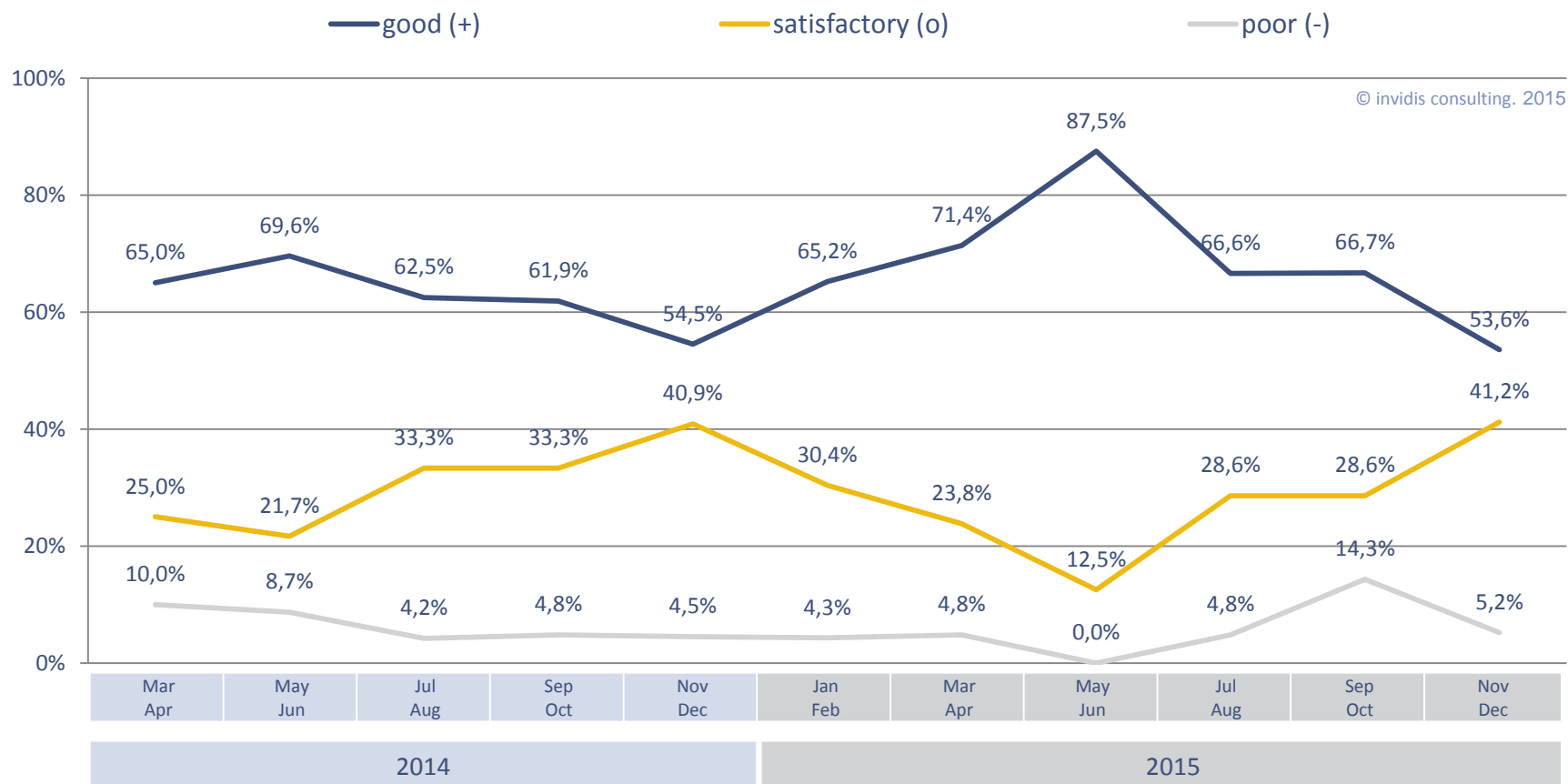


Fig. 2: DBCI Benelux November | December 2015 "business situation", n=97



The outlook for the near future is increasingly positive

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

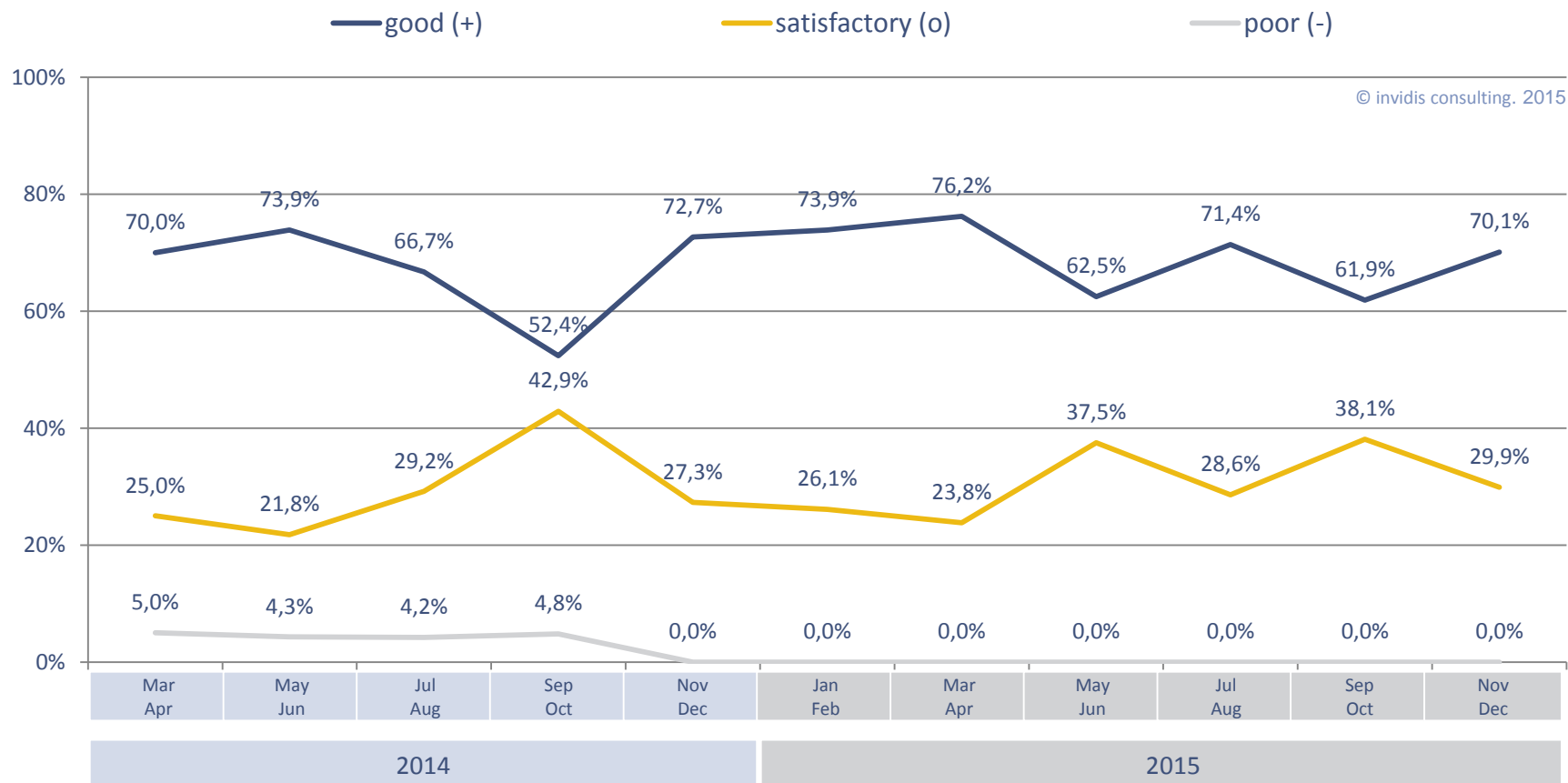
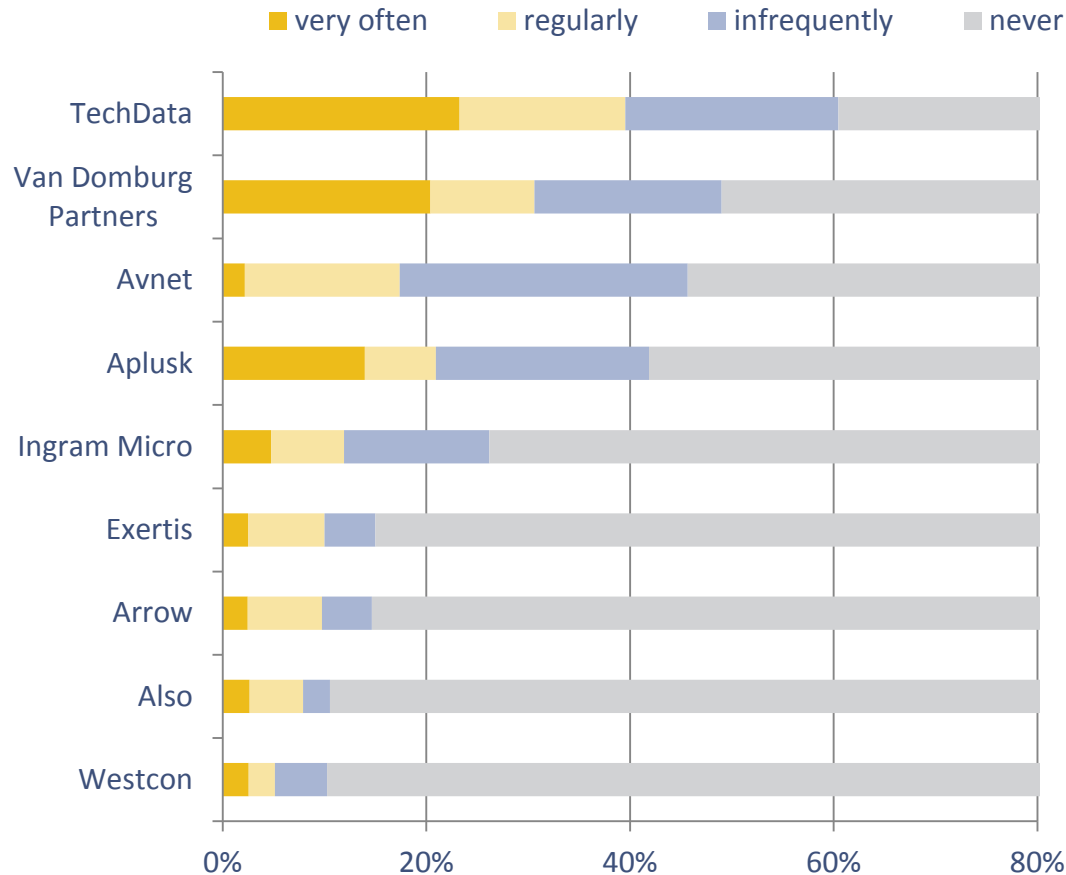


Fig. 3: DBCI Benelux November | December 2015 "business expectations", n=97

 Further research | The big 4 dominate the market

Question: „With which distributors do you work together?“



- The clear market leader among the distributors in Benelux is Tech Data. Over 60% of all polled companies work with this distributor.
- In short succession follow, Van Domburg Partners, Avnet and Aplusk. Between 40% and 50% of the market participants have worked with those competitors.
- Most IT distributors offer Digital Signage related services. The market participants have noted that DS projects offer a good possibility to generate additional revenues to the standard box-moving business.

Fig. 4: DBCI Benelux November/December 2015 "Ranking distributors", n=39 (mean value)



Further research | DooH is steadily increasing in relevance

Question: Please rate the degree of capacity utilization of your DooH network(s) with advertising bookings in 2015 compared to 2014 (including the expected bookings until the end of the current year)?

- Almost 50% of the polled companies currently doing business in the Digital out of Home market have registered a similar number of advertising bookings in the year-on-year trend in 2015 compared to 2014
- Still 46% of the market has seen a rise in bookings in the current year. Thus the overall market is expected to register a healthy increase in the number of advertising bookings for 2015.
- In general DooH is starting to play a more and more important part in the media landscape. DooH is accounting for the most dynamic segment in the traditional ooH advertising branch. Primarily through the digitalisation of media assets has the industry been able to compete with the development in the new media landscape.

YoY bookings of DooH Networks
2014/15

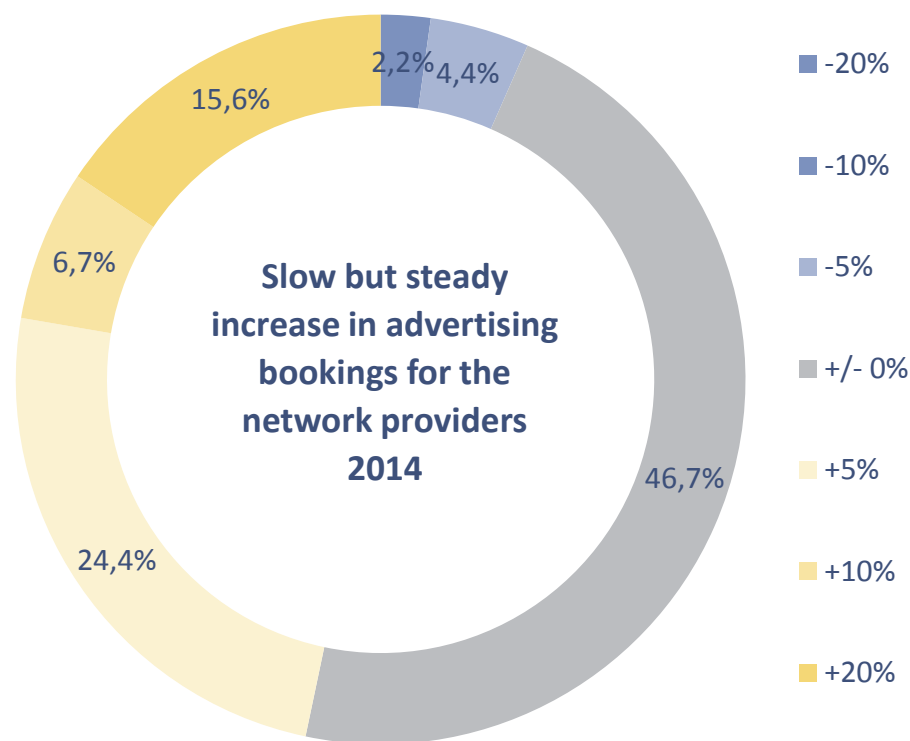


Fig. 5: DBCI Benelux November | December 2015 "capacity utilization 2014/15", n=45

 Roadmap 2015 & Contact

2016	
January	← Jan./Feb. 2016/02/01
February	
March	← Mar./Apr. 2016/03/21
April	
May	← May./Jun. 2016/05/23
June	
July	← Jul./Aug. 2016/07/18
August	
September	← Sep./Oct. 2016/09/19
October	
November	← Nov./Dec. 2016/11/21
December	

- The next survey will take place in calendar weeks 2-3 of 2016
- The next planned publication date will be the 1st of February 2016
- 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 2016. 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