

Netherlands
Belgium,
Luxembourg
January | February 2016

DBCI

The pulse of the Digital Signage
and DooH industry

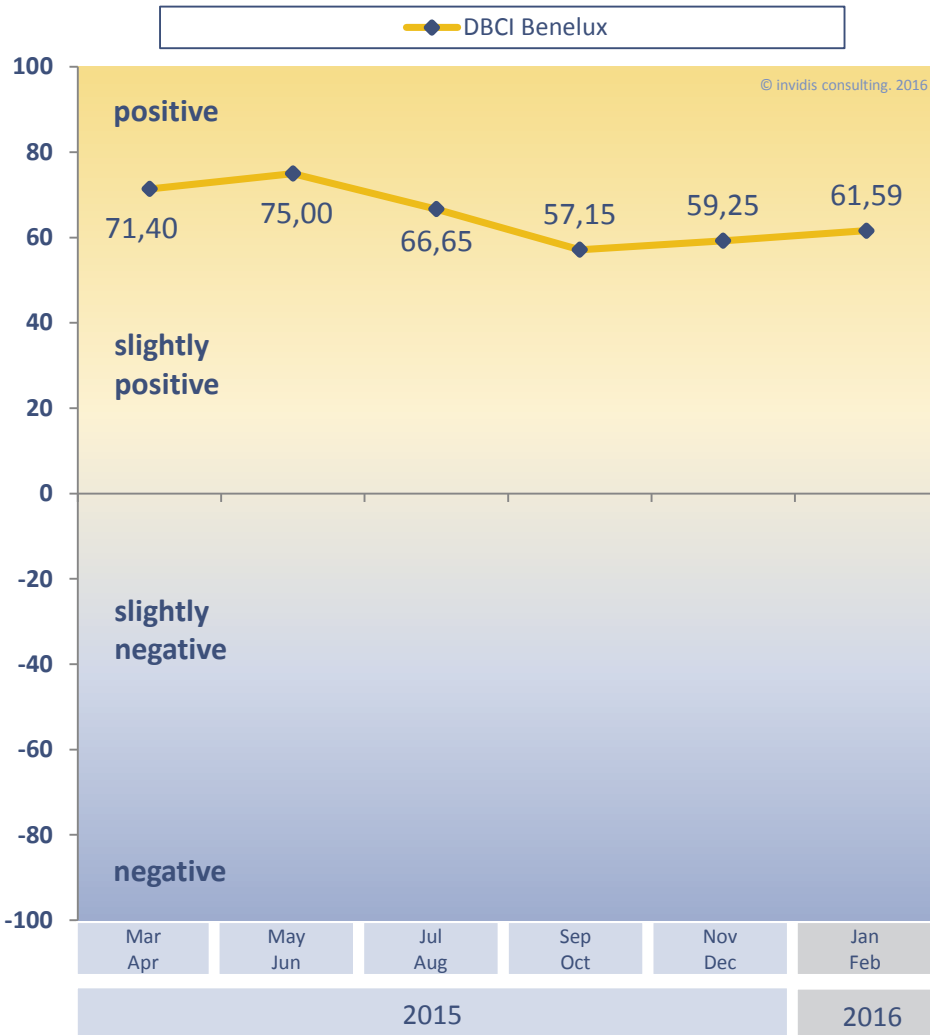
OVAB Digital Signage & DooH
Business Climate Index

 **DIGITAL SIGNAGE
SUMMIT @ISE**


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invidis research
2016 NL 100

Digital Signage business sentiment continue with positive trend



- Since the last survey in November 2015 the Digital Signage Business Climate Index in the Benelux region has increased by 2,35 base points from 59,25 base points to 61,59 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 outright positive assessment of the situation has slightly declined. The optimism towards the near future again saw a strong increase by over 10%. Now 80% of all polled companies expect a *more favourable* situation for their products and services within the next six months.
- A GDP growth of well over 2% (Netherlands) and 1% (Belgium) in 2015 and a positive development in the exports sector have strengthened the Benelux economies and freed budgets for strategic investment in future-proof technologies and the digital transformation.
- In the Digital Signage industry projects became bigger and more complex in the last year. Particularly the retail sector is increasingly investing in integrated digital technology to effectively target their customers and measure campaign impact.

change
DBCI 2016 #1

year-on-year



previous survey



Fig. 1: DBCI Benelux January | February 2016 „Index“ rolling 12 months, n=82

Participants: n=82; Region: Benelux; Survey Period: 2016 calendar weeks 2-3



Current business situation more conservative, but very positive outlook

Current business Situation | Benelux | January/February 2016

Expectations | Benelux | January/February 2016

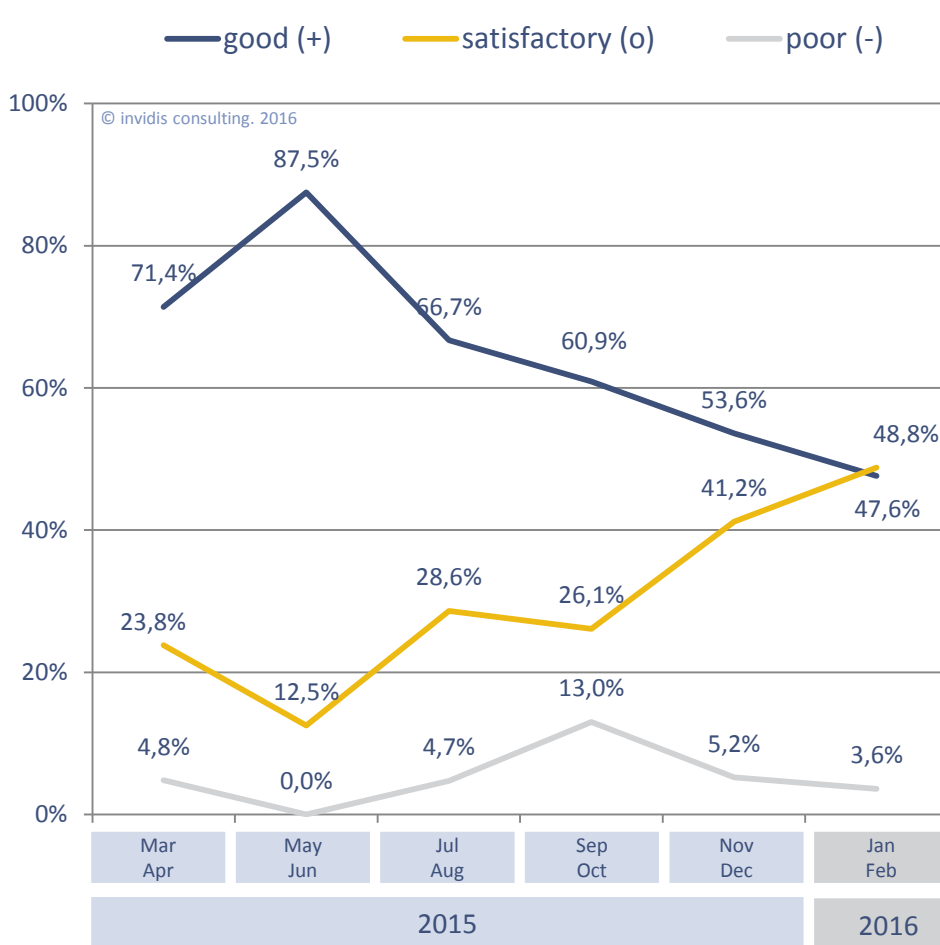


Fig. 2: DBCI January | February 2016 „Business Situation Benelux“ rolling 12 months, n=82

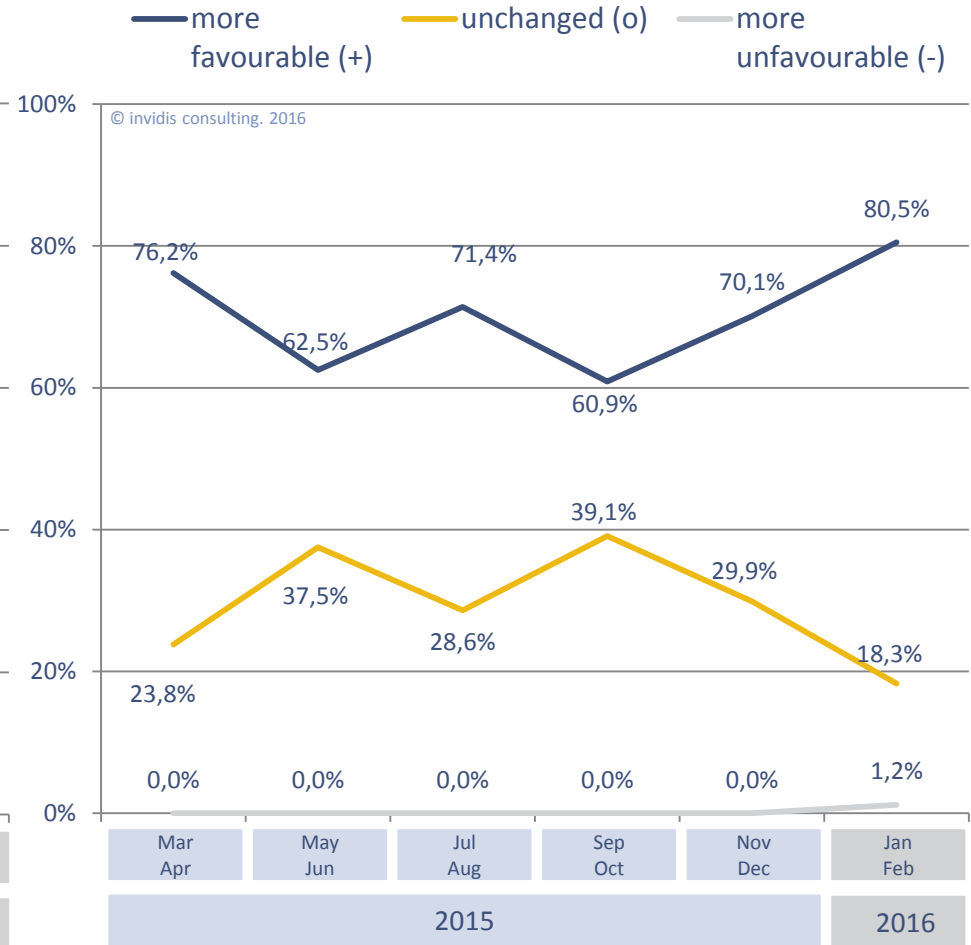


Fig. 3: DBCI January | February 2016 „Expectations Benelux“ rolling 12 months, n=82

Hirings 2015 | Digital Signage creates many new jobs

- **57,2%** of all companies in the Digital Signage Market have hired new staff in the last year.
- In 2015 **up to 200 new jobs** were created in the Digital Signage market in Benelux.
- Now this unbroken positive trend in the IT industry overall has developed in a definite shortage of qualified personal. Companies are more and more concerned, how they can match recruiting with their growth strategy.
- As a whole there is a high demand for qualified personnel. Due to the digital transformation and the increasing integration of digital technologies 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 2015

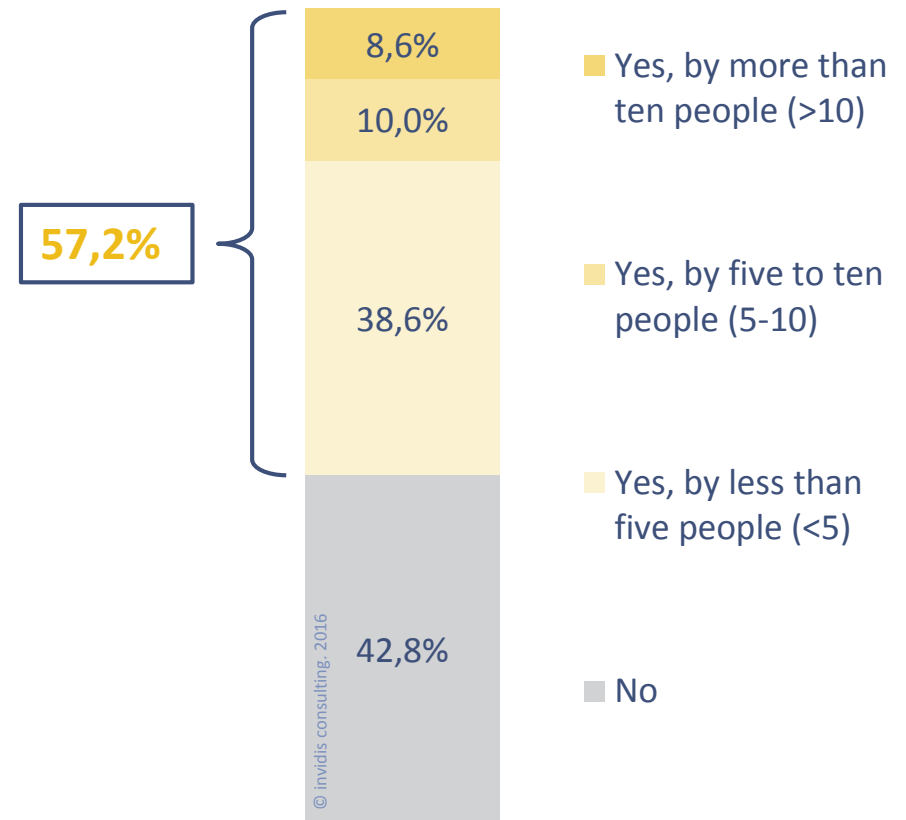


Fig. 4: DBCI Benelux January/February 2016 "Hirings 2015", n=70

Tops & Flops 2015 | Good revenue growth and 4k moved the market

- When asked about the positive developments for the Digital Signage and Digital-out-of-Home industry in 2015, many of the polled companies have mentioned their overall satisfaction with the economical development. The maturity of the Digital Signage market was also honoured by the customer as rising demand resulted in robust growth in revenues.
- The last years also saw the emergence of new high end technology solutions like Ultra-High-Definition (4k) or high brightness displays. Whereas display solutions for on-board media players like SoC and OPS as well as out-of-the-box packaging of hard and software on Android basis has been stimulating the customer demand, particularly in the SMB segment. The quality of established technologies like touch and video wall has been further improved, which reflected well in the sales numbers.
- Digital Signage solutions in the retail/POS environment still is one of the most important revenue generators for market participants. However, lately the dynamism for corporate communication projects has also gathered speed. Also digital menu board projects have been finally rolled out successfully.
- When asked about the negative developments on the Digital Signage market, the survey participants criticized primarily that in spite of high customer demand, realisations are slow and lag behind expectations.
- Many market participants also were concerned with some technology solutions not yet reaching the expected performance. The opinion is that the recent developments like entry level signage solutions, iBeacons or 3D technology have not yet reached a sufficient level of quality.



image: invidis

Trends 2016 | Interactivity and retail solutions on the agenda for 2016

- The market participants have identified many different trends for the year 2016. In their eyes one dominant trend is interactivity. Touch technology is becoming extensively integrated and now more and more smart concepts have markedly increased the usability. This development will pick up more speed in the future, particularly as the second big trend is closely connected.
- Digital Signage in retail or at the POS is still a big issue. The media will become the focal point where brick-and-mortar and online meet. Intelligent Multi- and Omni-channel concepts are in demand. Digital Signage companies will have to think more integrated, as technologies like Beacons, electronic price tags, customer flow management and analytics come into the fold. Particularly, high quality display technology suitable for an outdoor environment (high brightness/sunlight readable) is opening up the potential of endless miles of shop windows.
- Concerning the latest technology trends, the companies surveyed in the DBCI see falling prices for LCD and LED display technology. This results in growing customer demand for larger display sizes and LED boards. Next to this, a small yet continuously growing market share for UHD (4k) is expected.
- The main trends in the Digital-out-of-Home segment will further be the two main pillars of success for the media, quality audience measurement (standardisation, etc.) and effective integration in the digital media world e.g. programmatic buying. Also a consistent development of the existing networks in size and quality is expected.



image: invidis

Roadmap 2016 & Contact

2016	
January	
February	
March	← DBCI Mar./Apr. WN14
April	
May	← DBCI May./Jun. WN22
June	
July	← DBCI Jul./Aug. WN31
August	
September	← DBCI Sep./Oct. WN40
October	
November	← DBCI Nov./Dec. WN49
December	

- The next survey will take place in calendar weeks 11-12
The next planned publication date will be in week 14
- 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.

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**DIGITAL SIGNAGE
SUMMIT @ISE**

- «Digital Signage Summit» new brand for event series

- ❖ DSS Europe: 23-24 June 2016
- ❖ DSS MENA: 19-20 Sep 2016
- ❖ DSS Russia: 1-2 Nov 2016



**DIGITAL SIGNAGE
SUMMIT EUROPE**

- DSS is a dedicated confex event platform - conference and exhibition - featuring digital signage and DooH topics



**DIGITAL SIGNAGE
SUMMIT RUSSIA**

- Each event features visionary and best practise presentations as well as panel discussions concerning the most recent state of the art projects, trends and drivers of the industry



**DIGITAL SIGNAGE
SUMMIT MENA**

- All events also have a dedicated exhibition space for product presentation and networking opportunities

DSS | Digital Signage Summit Kick-off Sessions @ ISE 2016



DSS Kick-off Sessions @ ISE 2016

**Integrated
Systems
Europe**
9-12 February 2016
Amsterdam, RAI, NL



- Together with the ISE and in cooperation with Digital Signage Summit Europe, invidis consulting will be present at [Integrated Systems Europe](http://Integrated Systems Europe 2016) 2016 (9 – 12 February 2016, Amsterdam) with several digital signage events.
- **ISE 2016 Presentations invidis consulting**
Every Day at 12:00, Commercial Theatre Hall 8
- **Digital Signage Summit Market Briefings**
Every Day at 14:00, Room F102
- **Digital Signage Summit Guided Tours**
Every Day at 14:30, Room F102
- **More here:**
invidis.de/ise-2016-digital-signage-ise-program/