

Netherlands
Belgium,
Luxembourg
March | April 2016

DBCI

The pulse of the Digital Signage
and DooH industry



Digital Signage & DooH
Business Climate Index



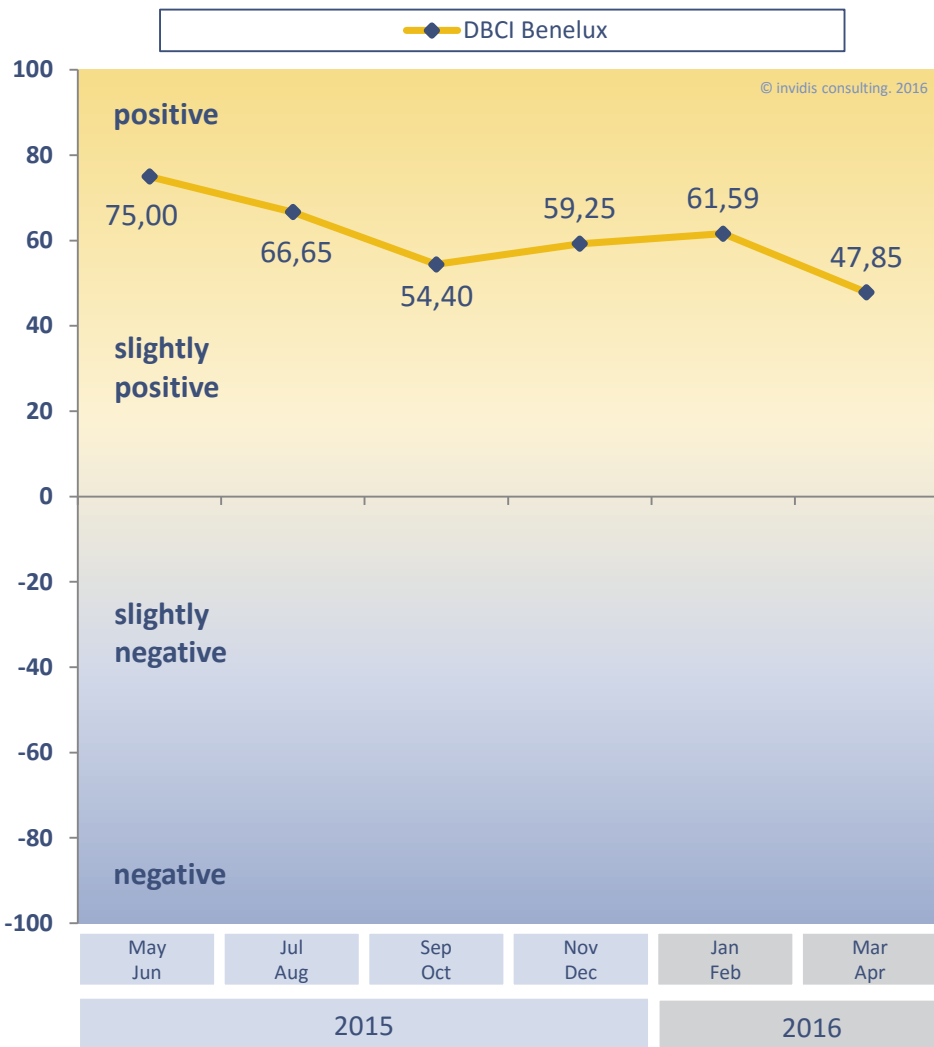
**DIGITAL SIGNAGE
SUMMIT EUROPE**

23-24 June 2016, Munich, Germany



invidis research
2016 NL 200

Digital Signage business sentiment with correction in the first quarter 2016



- Since the last survey in January 2015 the Digital Signage Business Climate Index in the Benelux region has decreased by 13,74 base points from 61,59 base points to 47,85 base points.
- The satisfaction with the current business situation for products and services in the Digital Signage and Digital out of Home industry has decreased. While the outright positive assessment of the situation has stabilised and now is at almost 50%.
- Also the optimism towards the near future saw a decrease by well over 15%. However still 66% of all polled companies expect a *more favourable* situation for their products and services within the next six months.
- The very good sentiment from the successful fourth quarter of 2015 transferred to the start of 2016. Yet, the final results of the first quarter in 2016 could not match the high expectation of the market participants.

change DBCI 2016 #2

year-on-year	previous survey
-33,0%	-22,3%

Fig. 1: DBCI Benelux March | April 2016 „Index“ rolling 12 months, n=47
Participants: n=47; Region: Benelux; Survey Period: 2016 calendar weeks 11-12

Robust current business situation and more conservative outlook

Current business Situation | Benelux | March/April 2016

Expectations | Benelux | March/April 2016

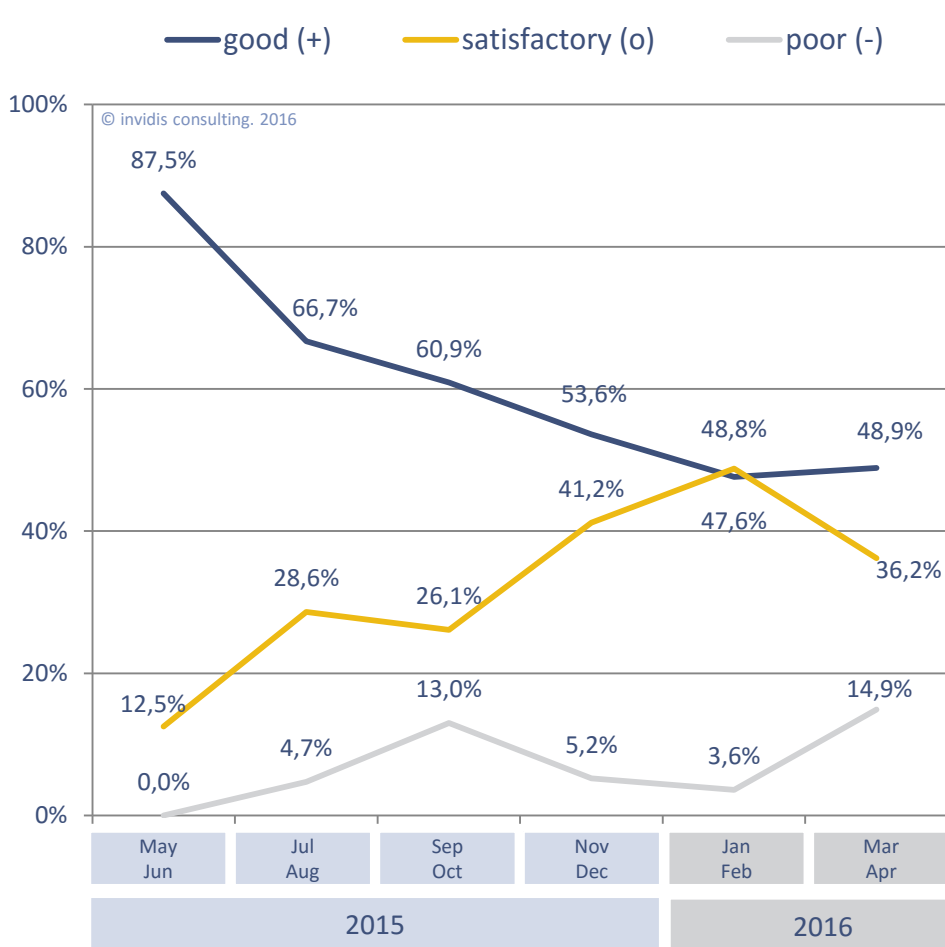


Fig. 2: DBCI Benelux March | April 2016 „Business Situation Benelux“ rolling 12 months, n=47

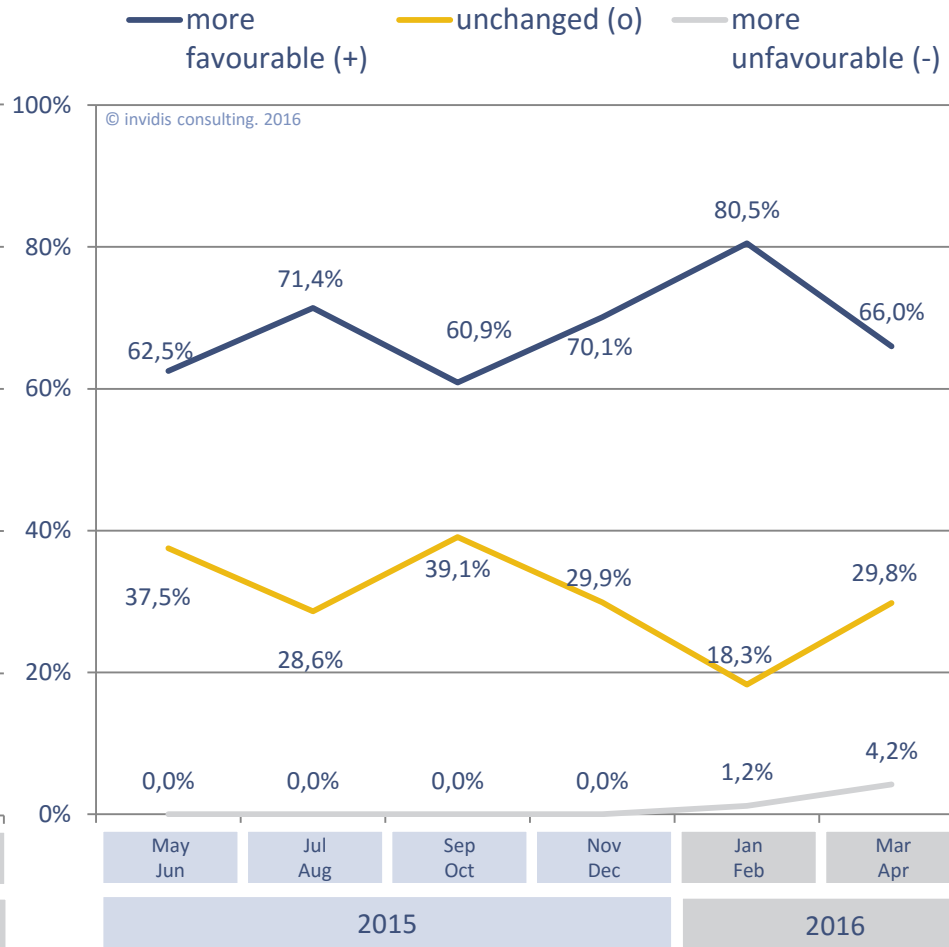


Fig. 3: DBCI Benelux March | April 2016 „Expectations Benelux“ rolling 12 months, n=47

Retail defends top spot, strong demand for Digital out of Home and Education

Question: We would like to assess the dynamic for Digital Signage in the different vertical markets. In which vertical markets has your company realised the most projects in 2015? Please rate the Top 3 vertical markets.

- Retail is with approximately one fifth of all Digital Signage revenues the biggest vertical market. Customer engagement, marketing and ambient installations become more and more common not only in most high-street retailers, but also in small and medium businesses.
- However, in the last year other vertical markets have become more important for the industry. Particularly, the education and industry/production segments saw a high dynamism in 2015.
- Digital out of Home advertising is also a very interesting target market. 2015 saw good investments into this sector by the big advertising companies. The market is expecting to see more roll outs and technology renewal business in the near future

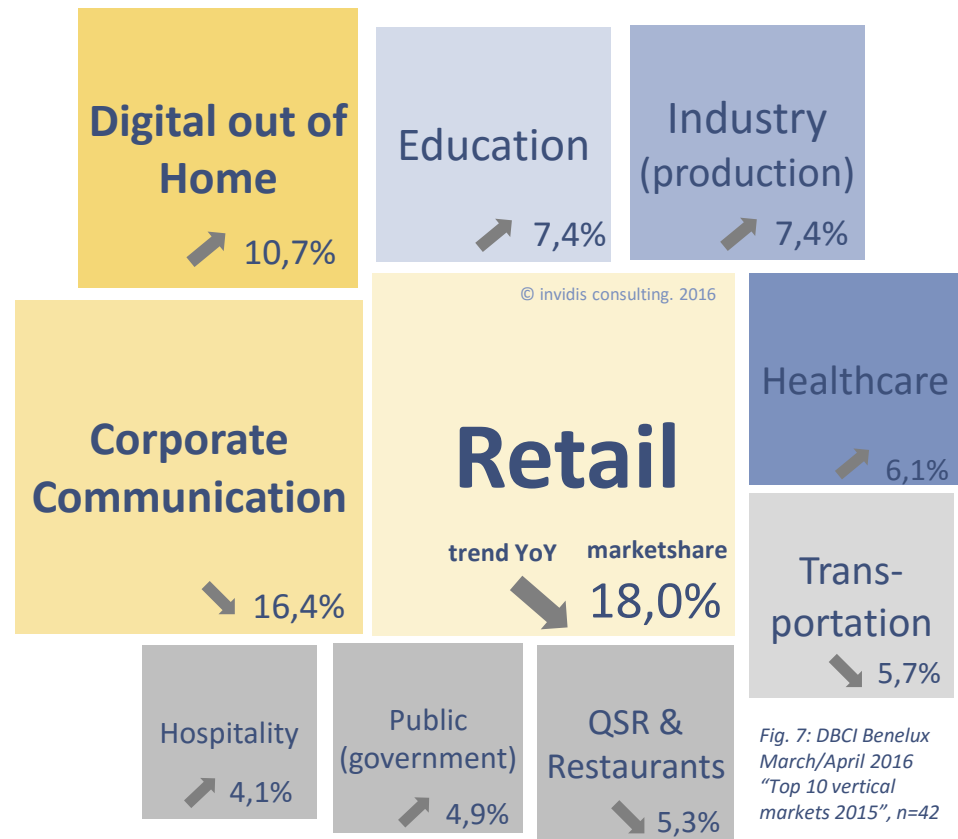


Fig. 7: DBCI Benelux March/April 2016 "Top 10 vertical markets 2015", n=42

Network expansion and new installations will drive DooH

Question: Which factors will primarily lead to an increasing market share of DooH?

- The main driver for DooH in the future will be. The expansion of existing networks. Almost 40% of all DooH market participants expect this development to give the industry the most positive impulse in the next years. Here investments are increasingly shifted from installing new locations or displays to upgrading the existing technology (hardware / software)
- The market participants also expect more new networks to be rolled out in the near future. In spite of the already high penetration of DooH in Benelux, the industry still sees potential in previously undeveloped location.
- Only cross-media bundling for dynamic campaigns i.e. online video has not yet fully arrived. Contrary to the German speaking region, this seems to be yet a slow moving trend.

Reasons for future DooH growth

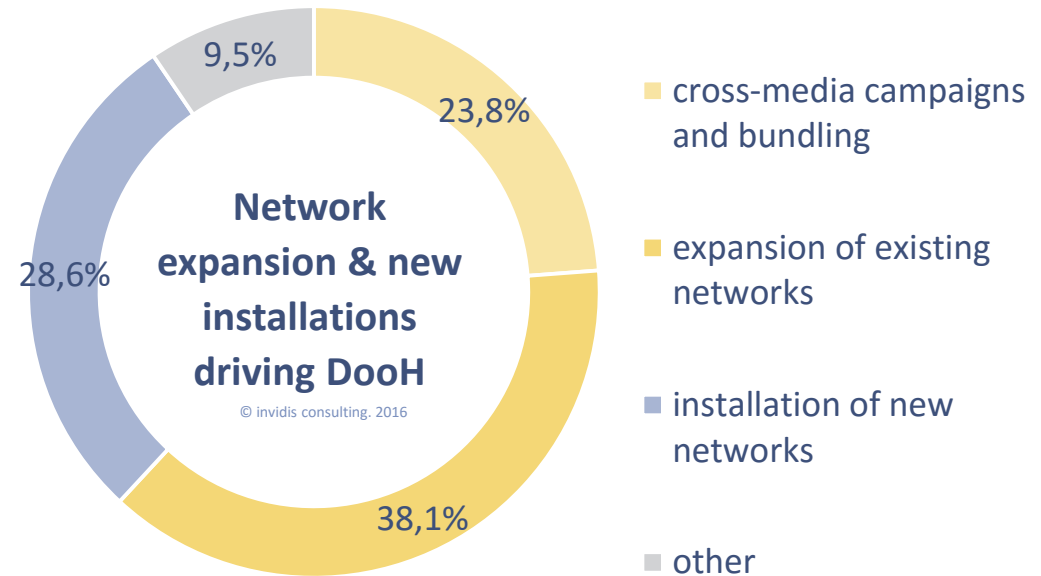


Fig. 8: DBCI Benelux March | April 2016 "growth reasons DooH", n=42

 Roadmap 2016 & Contact

2016	
January	
February	
March	
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	

OVAB Europe will be rebranded as **Digital Signage Federation Europe** starting with the 1st April 2016

- The next survey will take place in calendar weeks 19-20
- The next planned publication date will be in week 22
- 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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 DSS | The Digital Signage Summit series

- «Digital Signage Summit» new brand for event series
- DSS is a dedicated confex event platform - conference and exhibition - featuring digital signage and DooH topics
- 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
- All events also have a dedicated exhibition space for product presentation and networking opportunities

