

Netherlands  
Belgium,  
Luxembourg  
May | June 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 300

# Digital Signage market sentiment back on a positive trend in May

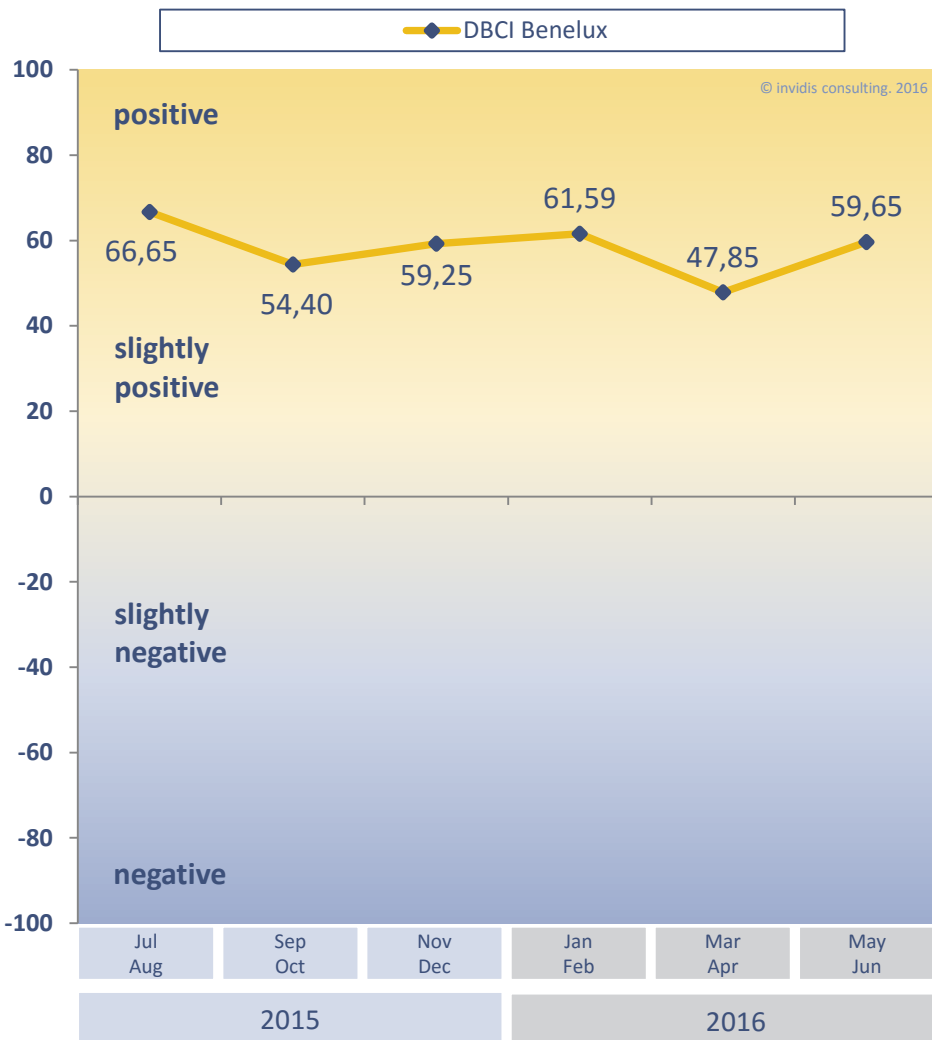


Fig. 1: DBCI Benelux May | June 2016 „Index“ rolling 12 months, n=31  
Participants: n=31; Region: Benelux; Survey Period: 2016 calendar weeks 18-19

- Since the last survey in March 2016 the Digital Signage Business Climate Index in the Benelux region has increased by 11,80 base points from 47,85 base points to 59,65 base points.
- The satisfaction with the current business situation for products and services in the Digital Signage and Digital out of Home industry has grown. While also the outright positive assessment of the situation has stabilised and scores now at well over 50%.
- Also the optimism towards the near future saw a slight increase. Adding up to a positive 25% swing in total compared to the last survey. However the index is still down by 20% in coparision to the May/June edition of 2015.
- The conservative mood in the IT and general economy in the second quarter was rather exaggerated. Most companies have realised that business is more dynamic as expected.

change DBCI 2016 #3

year-on-year	previous survey
-20,5%	+24,7%



# Greatly increased current business situation & positive outlook

Current business Situation | Benelux | May/June 2016

Expectations | Benelux | May/June 2016

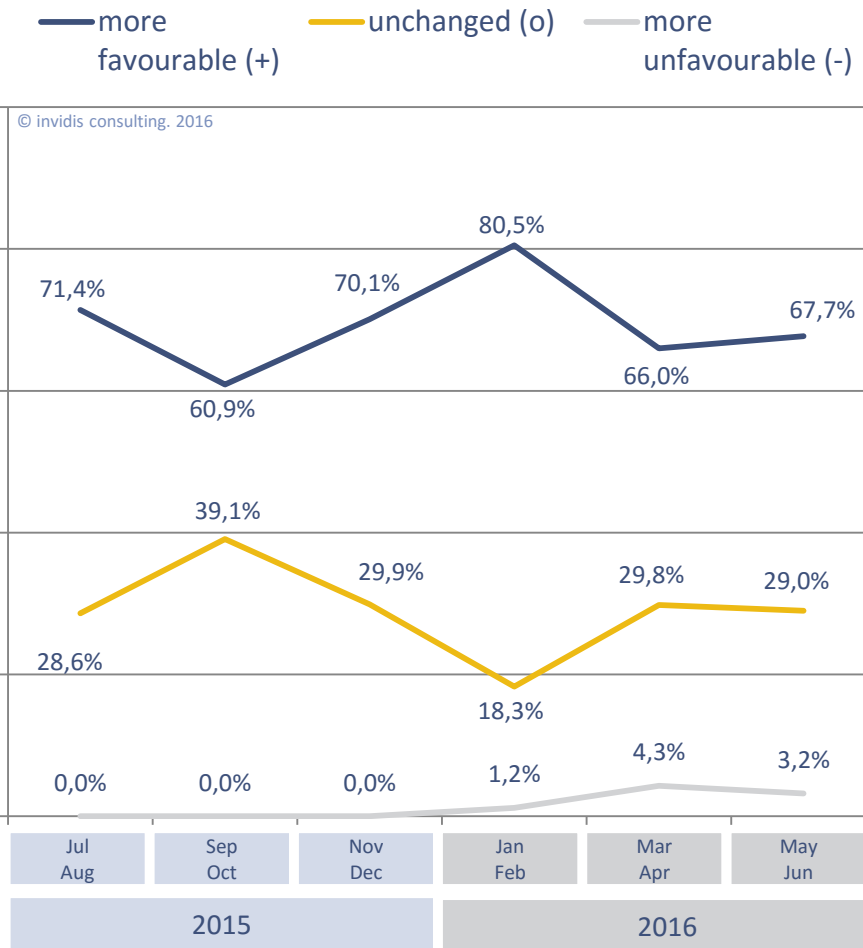
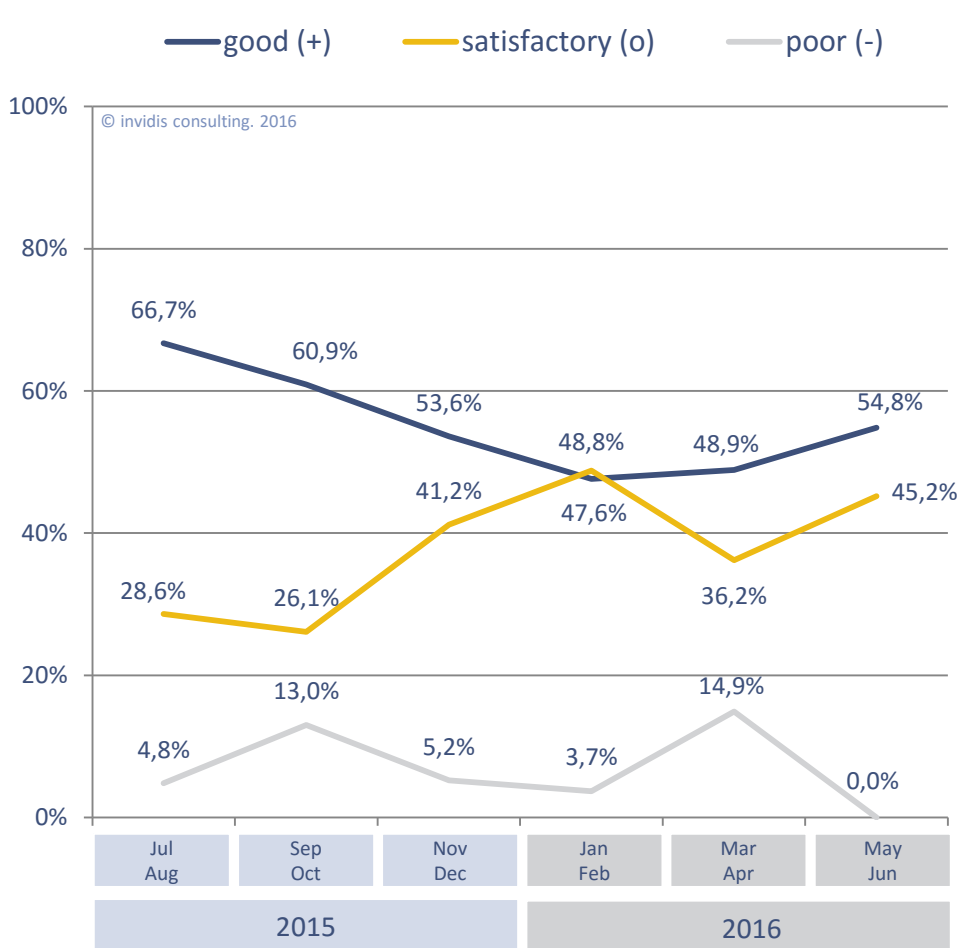


Fig. 2: DBCI Benelux May | June 2016 „Business Situation Benelux“ rolling 12 months, n=31

Fig. 3: DBCI Benelux May | June 2016 „Expectations Benelux“ rolling 12 months, n=31

# Windows in first, Linux challenges & Android picks up speed

**Question:** How high was the percentage of operating systems used in Digital Signage Projects in 2015?

Windows is implemented most frequently with Digital Signage projects. However other operating systems have significantly gained ground in the last two years.

Particularly Linux based installations are becoming more and more popular. Here cost and security issues are dictating the decisions. With Digital Signage installations becoming more varied in size and required performance, the appliances running on a non-PC architecture like Raspberry Pi, Cisco, BrightSign, Spinetix etc. are more widely integrated. Still there are a lot of challenges from a network management perspective regarding bigger networks.

Cost effective systems operating on Android basis currently have the highest dynamic in the market. Still many security and performance issues remain.

Apple operating systems could establish a robust nice segment. However, many managers with IT responsibility dismiss it as an operating system for Digital Signage installations.

Market share of IT operating systems in Digital Signage installations 2015

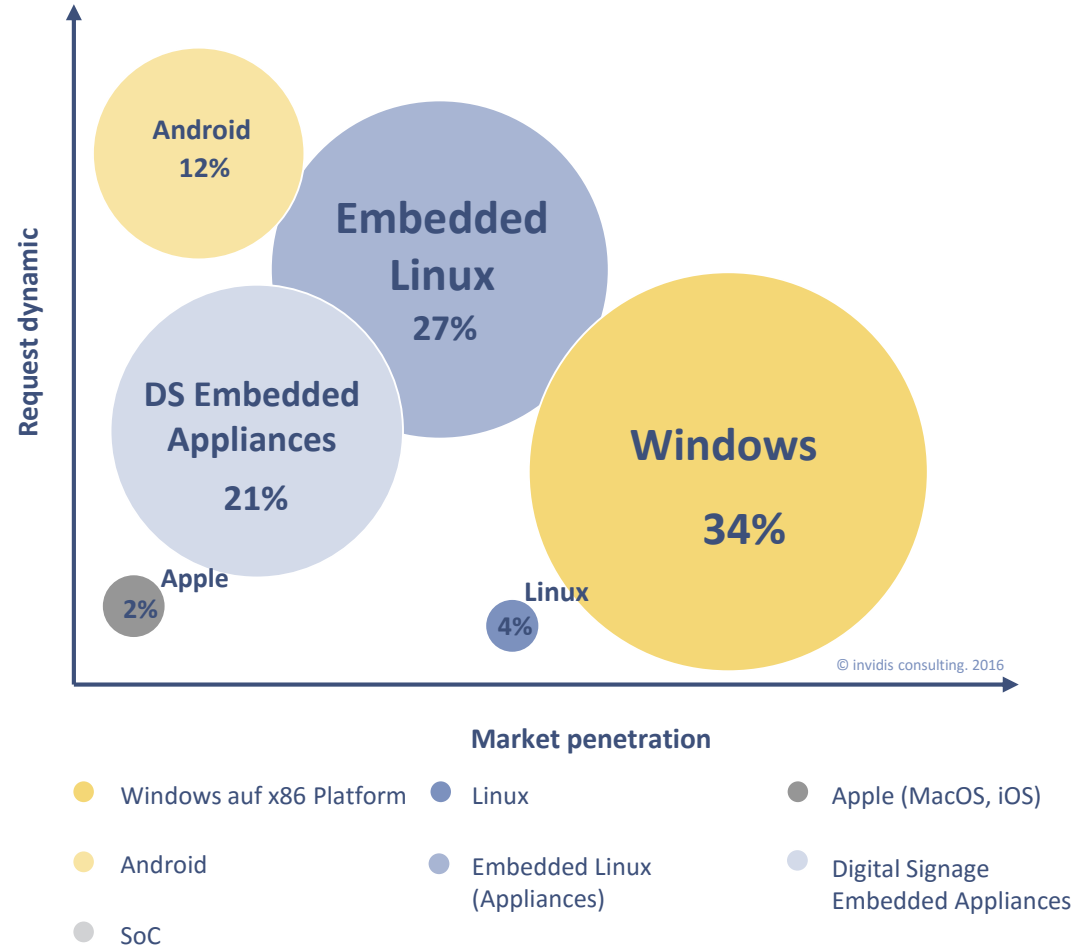


Fig. 4: DBCI Benelux May | June 2016 "operating systems 2015", n=17

Roadmap 2016 & Contact

2016
January
February
March
April
May
June
July
August
September
October
November
December

← DBCI Jul./Aug. | WN31

← DBCI Sep./Oct. | WN40

← DBCI Nov./Dec. | WN49

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

- The next survey will take place in calendar weeks 28-29
- The next planned publication date will be in week 31
- 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



 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

