

Netherlands
Belgium,
Luxembourg
July | August 2016

DBCI

The pulse of the Digital Signage
and DooH industry



Digital Signage & DooH
Business Climate Index



**DIGITAL
SIGNAGE
SUMMIT**

invidis research
2016 NL 400



Volatile Digital Signage market sentiment in the summer



- Since the last survey in May 2016 the Digital Signage Business Climate Index in the Benelux region has decreased by 6,76 base points from 59,65 base points to 52,90 base points. In total the Index is down by 20,6% year-on-year and by 11,3% compared to the previous survey.
- The positive assessment of the current business situation for products and services in the Digital Signage and Digital-out-of-Home industry has grown for the third successive time since the start of the year. However, the increasingly cautious view on the near future dominates the index and is responsible for the overall negative trend.

Further Research

- Almost 80% of the polled companies in the Benelux region expect growing revenues in 2016. Still 10% of the market participants had to accept a decline in revenues in the first two quarters of 2016. However most of those companies are expecting to balance the losses at the end of the year.
- The market is not overly concerned by the prospect of an economic fallout due to the Brexit vote in Great Britain

	year-on-year	previous survey
change	-20,6%	-11,3%
DBCI 2016 #4		

Fig. 1: DBCI Benelux July | August 2016 „Index“ rolling 12 months, n=34
Participants: n=34; Region: Benelux; Survey Period: 2016 calendar weeks 28-29

Positive trend of current business situation continuing & conservative outlook

Current business Situation | Benelux | July/August 2016

Expectations | Benelux | July/August 2016

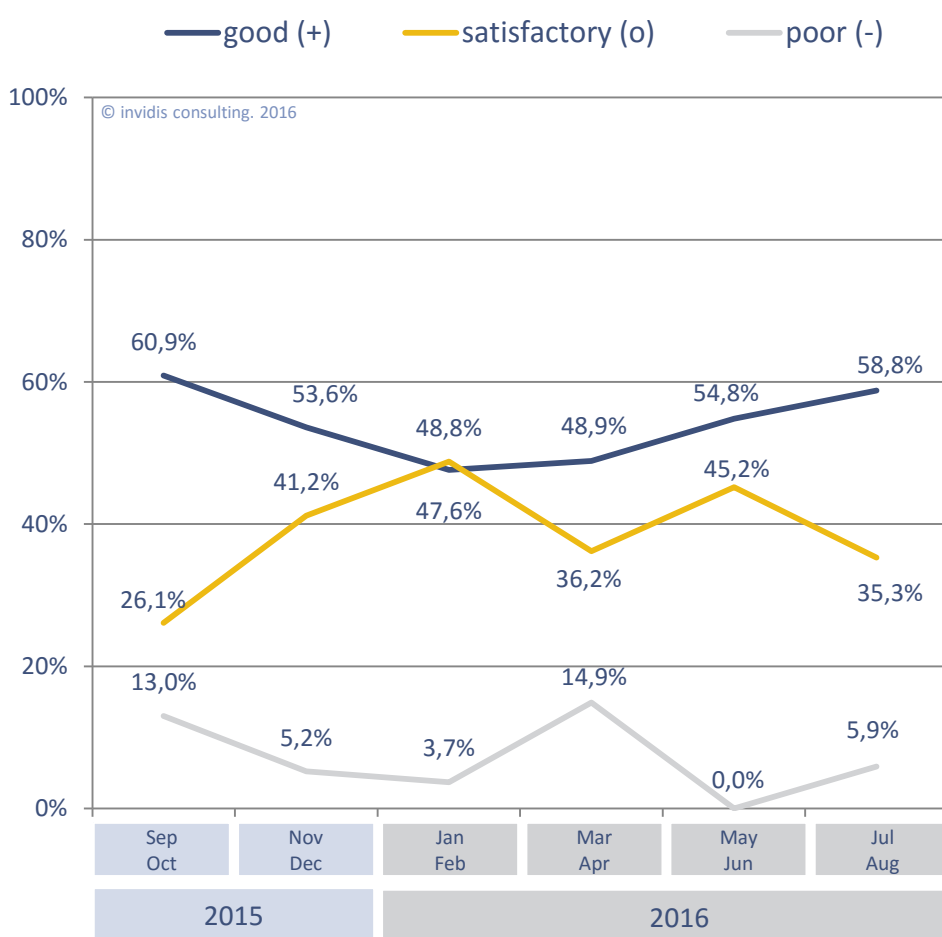


Fig. 2: DBCI Benelux July | August 2016 „Business Situation“ rolling 12 months, n=34

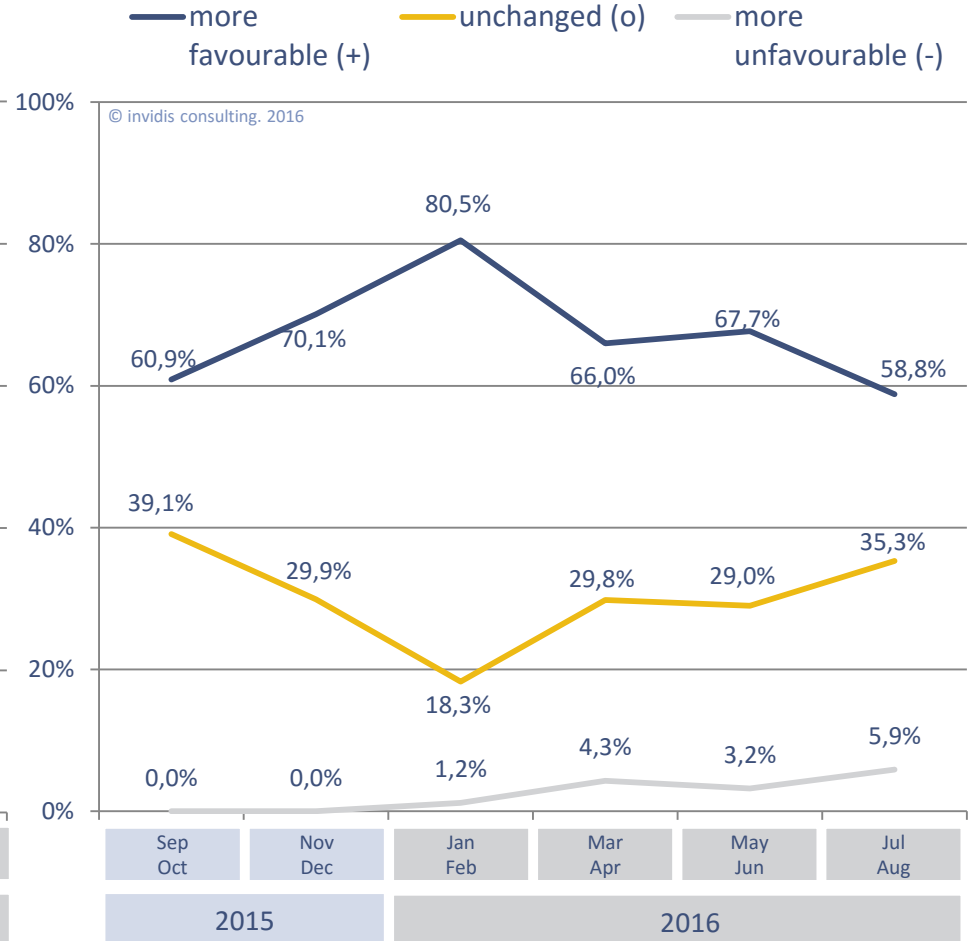


Fig. 3: DBCI Benelux July | August 2016 „Expectations“ rolling 12 months, n=34

Further research | First semester 2016 with considerably higher revenues than 2015

“The revenues in the first half year 2016 have ... in comparison to the revenues of the same period in the previous year.”

77,5% of all polled companies could generate in parts a clear **increase** in **revenues** in the first half year term in 2016 compared to the same period in the previous year

Only 9,7% of all polled companies had to accept a **decrease** in **revenues** compared to the previous year

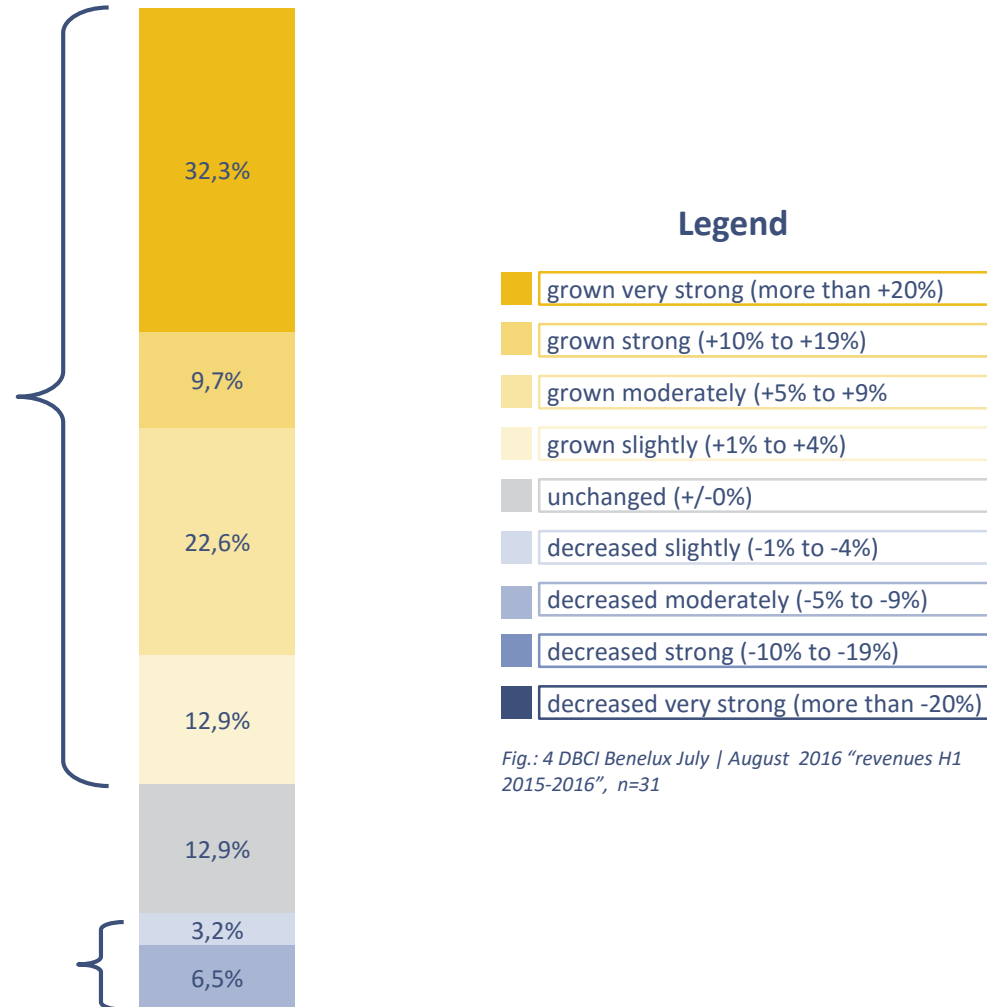


Fig.: 4 DBCI Benelux July | August 2016 “revenues H1 2015-2016”, n=31



Further research | Clear increase in revenues expected for the full year 2016

“The revenues in 2016 will ... compared to the revenues in 2015.”

80,0% of all polled companies are expecting a healthy **growth** in **revenues** for the year 2016 compared with the previous year

Only **3,3%** of all polled companies expect a **decrease** in **revenues** compared to the pervious year

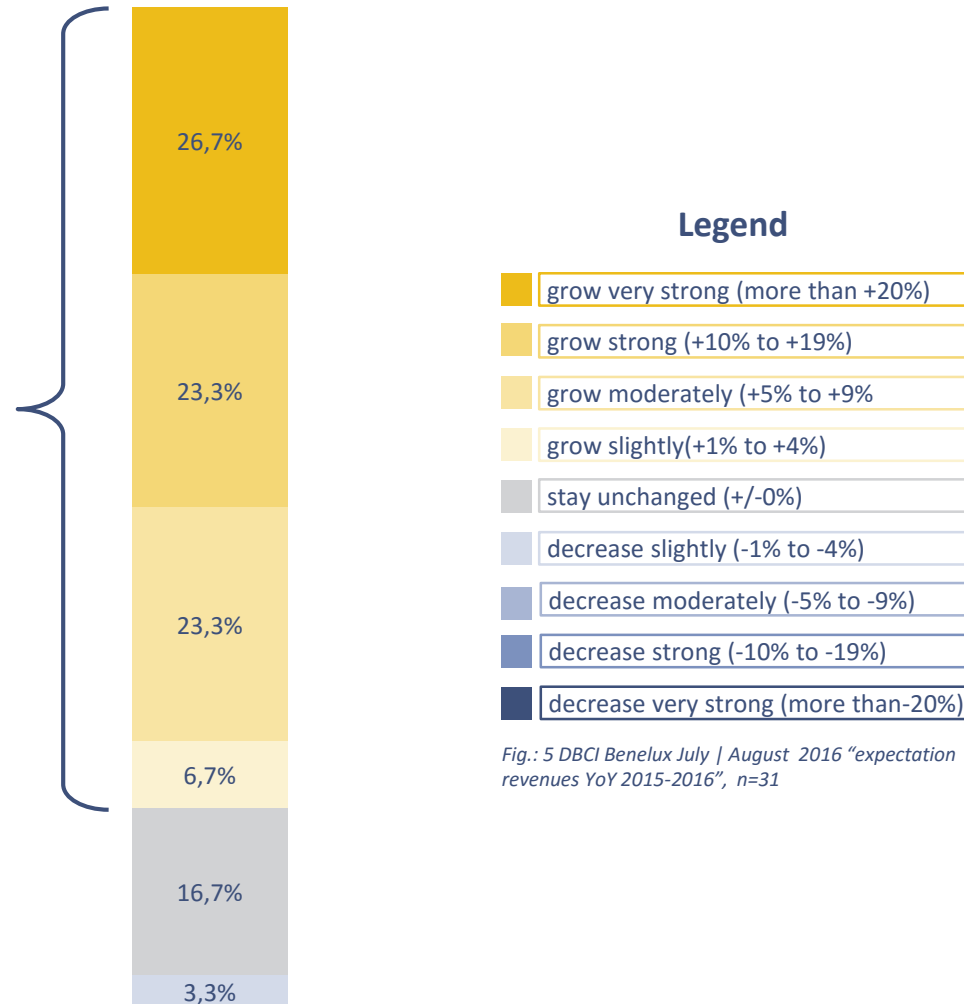
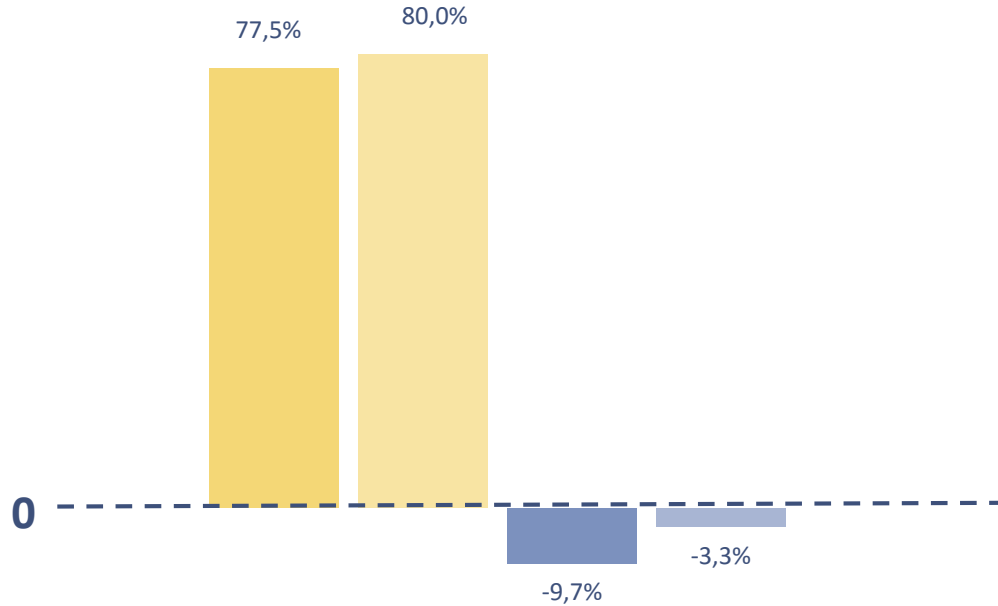


Fig.: 5 DBCI Benelux July | August 2016 “expectation revenues YoY 2015-2016”, n=31

Further research | First semester losses expected to be contained later this year



Percentage of polled companies which have registered a growth respectively a decline in revenues in H1 2016, compared to the same period in the previous year

- YoY H1 2015-2016 growth
- YoY 2015-2016 growth expected
- YoY H1 2015-2016 decrease
- YoY 2015-2016 decrease expected

Fig.: 6 DBCI Benelux July | August 2016 "revenues YoY H1 2015-2016 and YoY 2015-2016", n=31

- Almost 80% of the polled companies in the Benelux region expect to have a growth in revenues in 2016 compared to 2015
- Still 10% of all polled companies had to accept a decline in revenues in the first six months of 2016. However many of those companies are expecting to balance the losses at the end of the year
- Traditionally the IT business has a relative calm period in the summer, followed by a strong showing towards the end of the year



Further research | Brexit with only limited influence on Digital Signage market

Question 1: How do you expect the Brexit will influence your company/business?

Question 2: How do you expect the Brexit will influence your national Digital Signage and Digital out of Home market?

- More than 70% of the polled companies are not overly concerned for their business by the prospect of an economic fallout due to the Brexit vote in Great Britain
- The percentage who see no influence is even higher for the assessment of the influence on the general Digital Signage and Digital-out-of-Home economy in the Benelux region
- The industry is still very much concentrated on a local or national region. Most companies have no or only loose business interests in Great Britain.
- Market participants who expect a negative influence are either dependent on exchange rates because of their purchasing policy or have customers respectively close business ties on the islands.

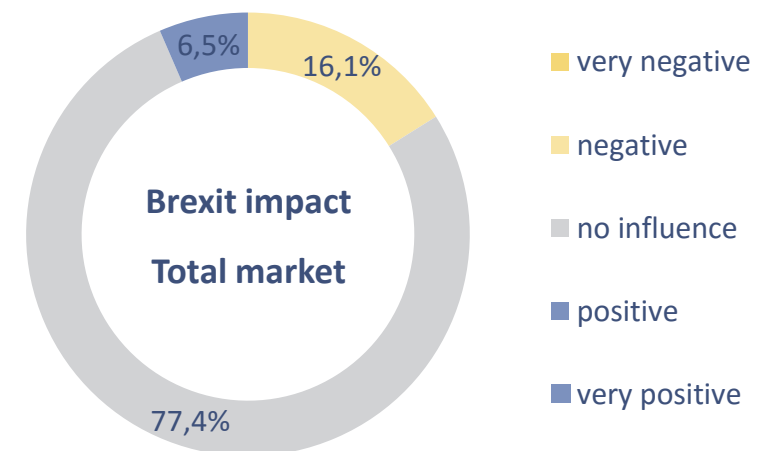
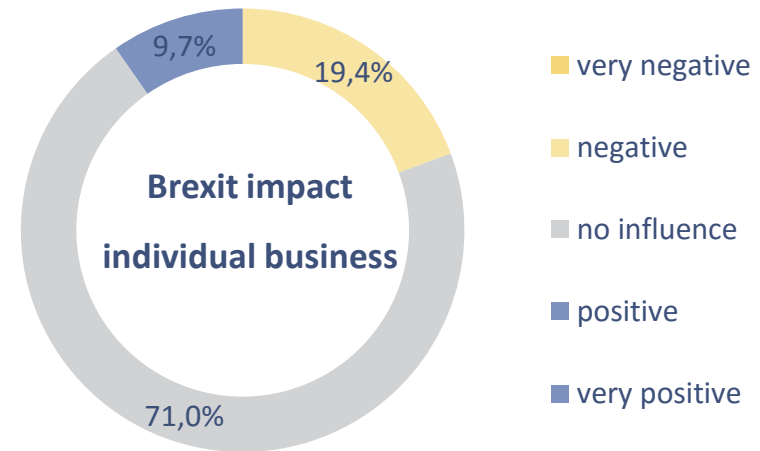


Fig. 7: DBCI Benelux July | August 2016 "Brexit", n=31

Roadmap 2016 & Contact

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

← DBCI Sep./Oct. | WN41

← DBCI Nov./Dec. | WN50

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

- The next survey will take place in calendar weeks 37-38
- The next planned publication date will be in week 41
- The DBCI is polled by invidis consulting and published in cooperation with DSF 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