

Netherlands
Belgium,
Luxembourg
November | December
2016

DBCI

The pulse of the Digital Signage
and DooH industry



Digital Signage & DooH
Business Climate Index



**DIGITAL
SIGNAGE
SUMMIT**

invidis research
2016 NL 600



Digital Signage business sentiment shows volatility during 2016



- The Digital Signage Business Climate Index in Benelux remains volatile throughout 2016. The index has seen a nominal decrease of 8,90 base points from 56,90 points to 48,00 points. In total the Index is down by -19% year-on-year and -15,6% compared to the previous survey.
- The general sentiment has switched to an overall conservative level - with negative ratings rising slightly. Still most market participants are satisfied or better with the current business situation.
- Since July the outlook towards the near future stabilised on a healthy level. Currently 60% of the surveyed companies are expecting a *more favourable* business situation for their products and services within the next six months.

Further Research

- The Digital Signage Top trends for 2017 are interactivity, market growth and high-brightness technology
- The DooH market participants expect a positive effect from the increasing implementation of cross media campaigns. Also the existing networks will be further developed.

change DBCI 2016 #6

| | |
|---------------|-----------------|
| year-on-year | previous survey |
| -19,0% | -15,6% |

Fig. 1: DBCI Benelux November | December 2016 „Index“ rolling 12 months, n=29
Participants: n=25; Region: Benelux; Survey Period: 2016 calendar weeks 47-48

Conservative current situation and slightly optimistic outlook

Current business Situation | Benelux | November/December 2016

Expectations | Benelux | November/December 2016

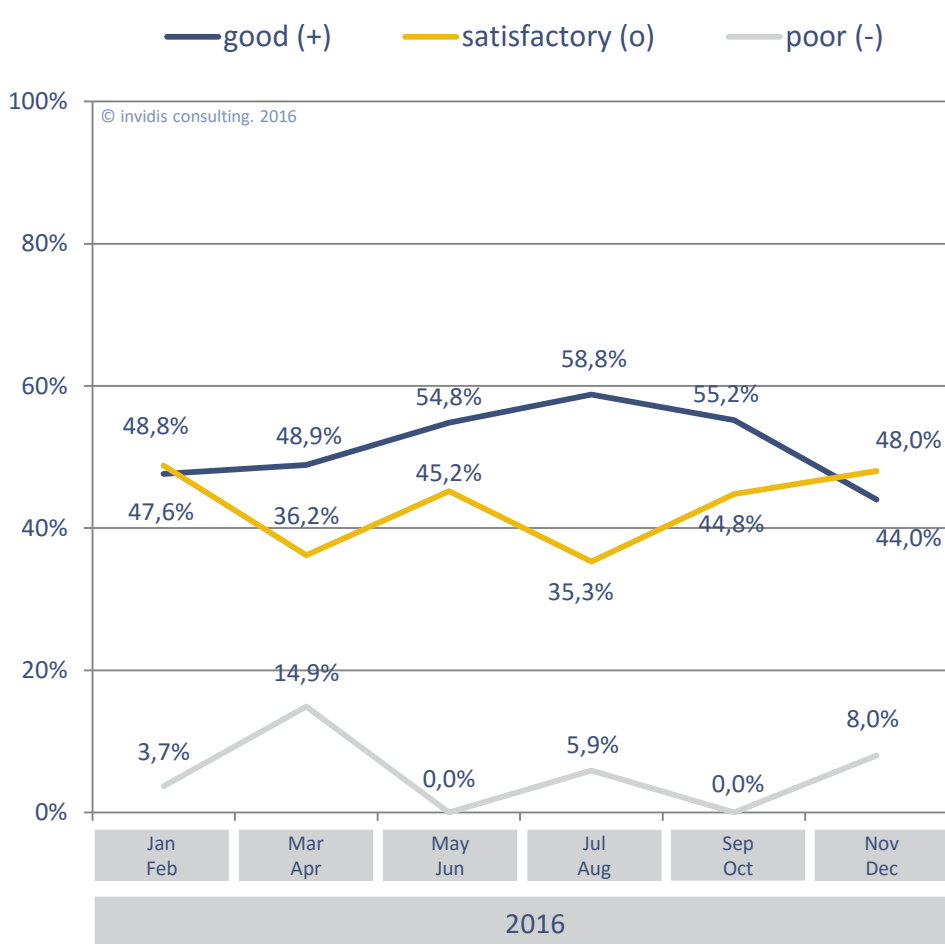


Fig. 2: DBCI Benelux November | December 2016 „Business Situation“ rolling 12 months, n=25

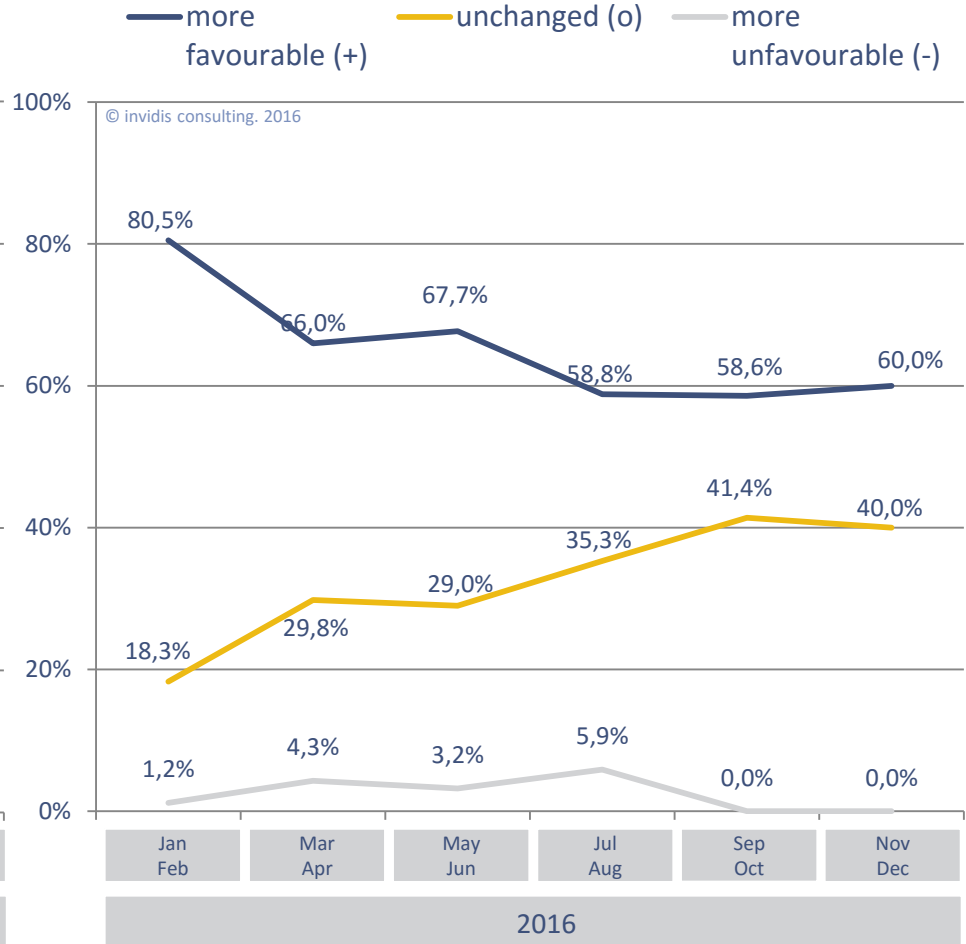


Fig. 3: DBCI Benelux November | December 2016 „Expectations“ rolling 12 months, n=25



Digital Signage Trends 2017 | High potential for interactivity and further market growth

Question: „Which important Digital Signage trends will become relevant in 2017 and which will lose in relevance?“

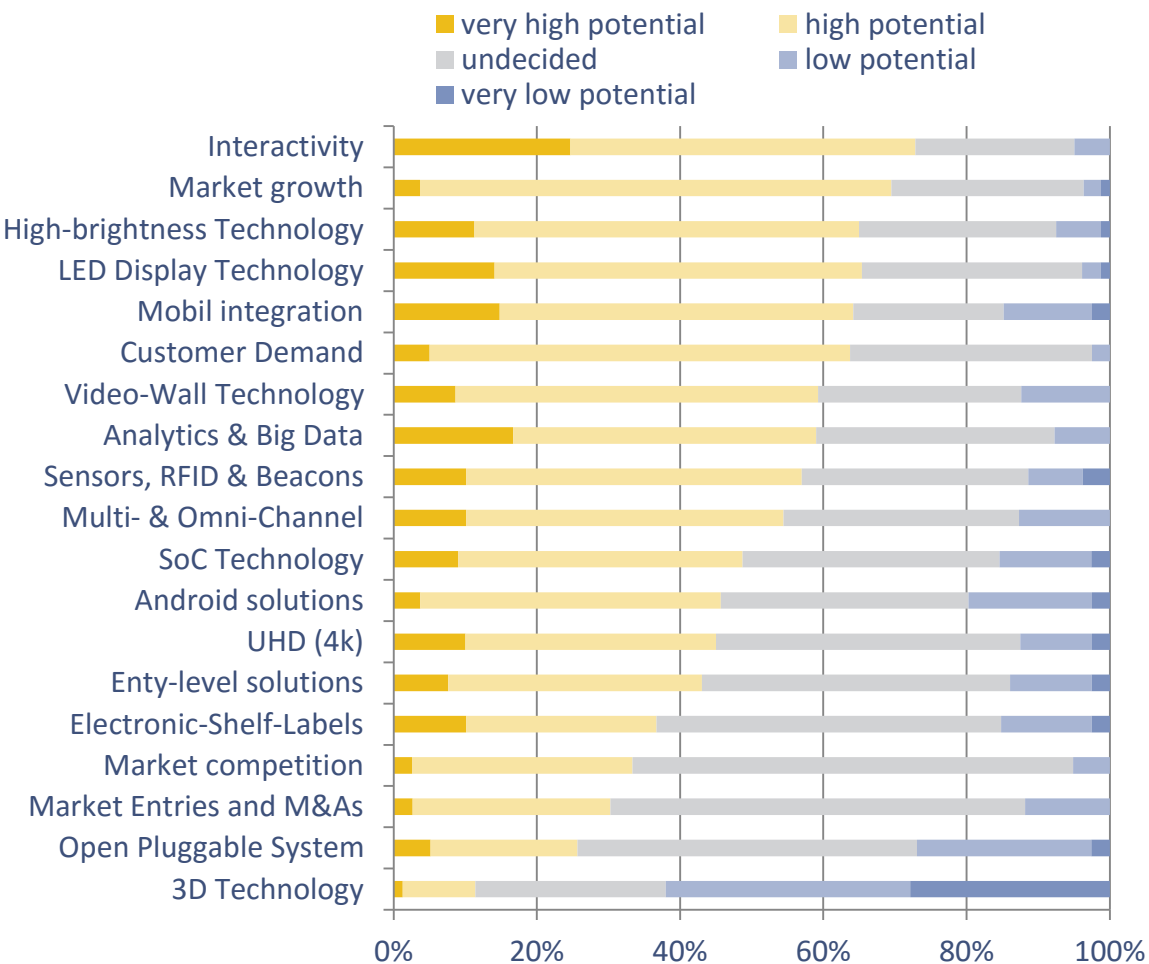


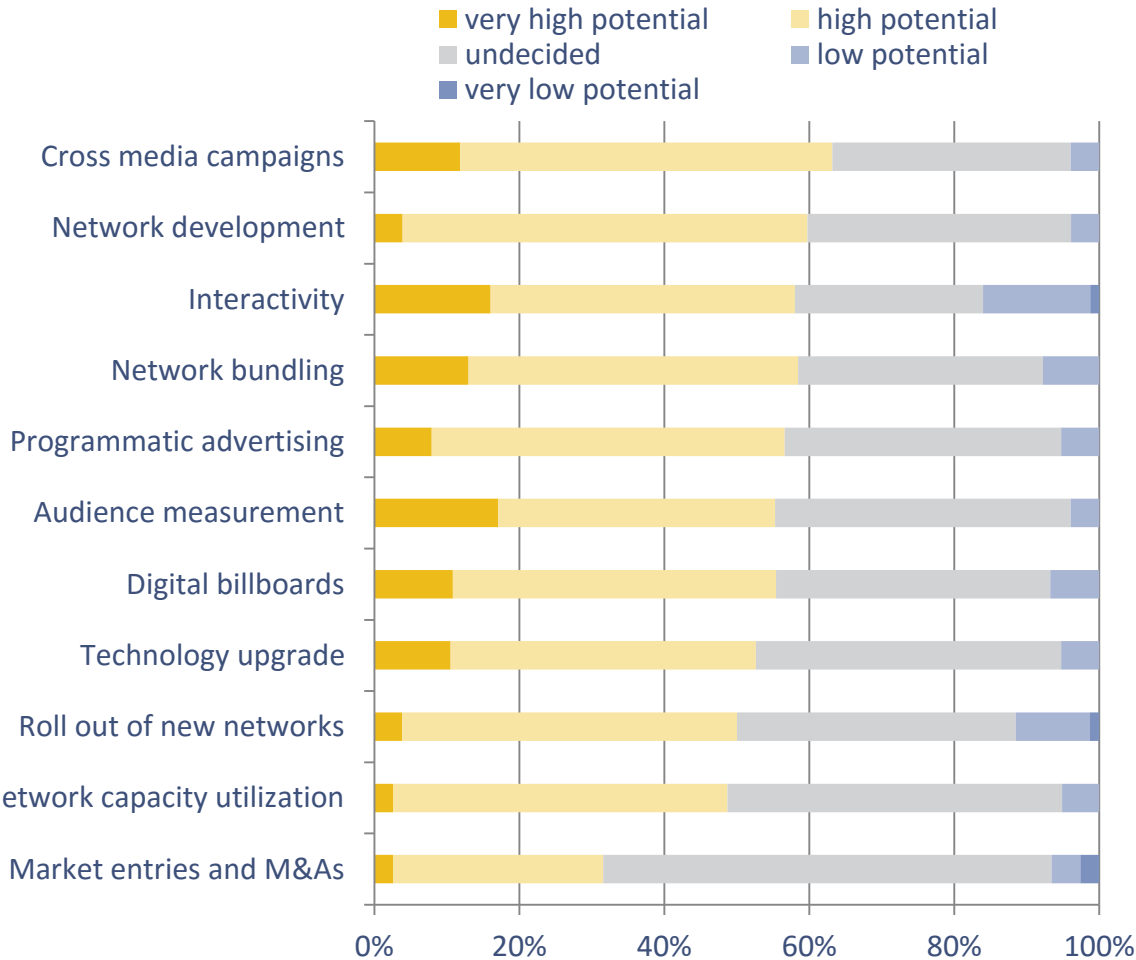
Fig. 4: DBCI Benelux November/December 2016 "Digital Signage Trends 2017", n=15 (mean value)

- The market participants identified many different trends for the year 2017. In their eyes the most dominant trend is interactivity. Touch technology is becoming extensively integrated and now more and more smart concepts have markedly increased the joy-of-use. This development will pick up traction in the future.
- Overall the surveyed companies trust the positive development in the market with continues growth potential and they expect even better business in the next year.
- Top of the trends are also technological developments that are closely connected with the retail environment. Particularly, high quality display technology suitable for an outward facing implementation (high brightness/sunlight readable) is opening up the potential of endless miles of shop windows. Also LED display technology is becoming more and more popular with retailers, as it has high brightness, can be used indoors and outdoors and its modularity overcomes the rigid adherence to the 16:9 format by most LCD displays



Digital out of Home Trends 2017 | Cross media campaigns will drive the market

Question: „Which important Digital out of Home trends will become relevant in 2017 and which will lose in relevance?“



- In general the Digital out of Home industry is banking on the positive effects of cross media campaigns. Here the business will strongly rely on shifting budgets from online video towards DooH.
- Also the bundling of networks will create more interesting products and the industry will have more success with the advertiser in offering a national reach and a dedicated target audience.
- Interactivity is also becoming a major trend. However, due to the difficulties of the technical implementation, the primary use case will remain the single installation & prime location campaign.
- Concerning the business side, the surveyed companies expect to see more development for existing networks like additional locations or better technology. They don't expect the market situation to change much, namely no roll-outs of new networks and no market entries.

Fig. 4: DBCI Benelux November/December 2016 "Digital out of Home Trends 2017", n=15 (mean value)

Roadmap 2016 & Contact

| | |
|-----------|------------------------|
| 2017 | |
| January | Jan./Feb. 2017/01/30 |
| February | |
| March | Mar./Apr. 2017/03/27 |
| April | |
| May | May./Jun. 2017/05/29 |
| June | |
| July | Jul./Aug. 2017/07/24 |
| August | |
| September | Sep./Oct. 2017/09/25 |
| October | |
| November | Nov./Dec. 2017/11/27 |
| December | |

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

- The next survey will take place in calendar weeks 2-3
The next planned publication date will be in week
- 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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- «Digital Signage Summit» is the leading event series for digital signage conferences in EMEA and North America
- 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
- Join us at one of our upcoming events in
 - DSS Russia | Moscow: 1. - 2. November 2016
 - DSS NYC | New York City: 9. November 2016
 - DSS MENA | Dubai: 6.-7. December 2016
 - DSS @ISE | Amsterdam: 8. February 2017
 - DSS South Africa | Johannesburg: 6. April 2017
 - DSS Orlando | Orlando: 13. June 2017
 - DSS Europe | Munich: 5.-6. July 2017
- More information at digitalsignagesummit.org