

Netherlands  
Belgium,  
Luxembourg  
1<sup>st</sup> Quarter 2017

**DBCI**



Digital Signage & DooH  
Business Climate Index

The pulse of the Digital Signage  
and DooH industry



**invidis**  
CONSULTING



**digital  
signage  
summit  
europe**

05-06 JULY 2017  
MUNICH  
GERMANY

invidis research  
2017 NL 100

# Positive trend in the Digital Signage business sentiment at the start of the year



- The Digital Signage Business Climate Index in Benelux has a strong showing at the beginning of 2017. The index has seen an increase by 14,5 base points from 48,00 points to 62,50 base points.
- Business Sentiment in the Digital Signage Industry reaches new heights. The current demand for digital signage solutions has risen by 1,5% yoy and 30% versus the previous survey.
- The excellent business sentiment reflects the general economic situation in the region with solid GDP growth and very stable outlook for 2017. Even the upcoming important elections in the Netherlands, Brexit as well as the election of the trump administration, have not significantly hampered business climate.
- We record positive developments in brick and mortar digitalisation, solid expansion in DooH networks and more international projects out of the Benelux market.
- New display technologies, strong demand for ESL and other retail based digital signage as well as a combination of consolidation/new market entrees bring new impulses to the market.

**Change  
DBCI 2017 Q1**

*year-on-year*

**+1,5%**

*previous survey*

**+30,2%**

Fig. 1: DBCI Benelux 1st Quarter 2016 „Index“ rolling 12 months, n=28

Participants: n=28; Region: Benelux; Survey Period: 2017 calendar weeks 2-3

# Much better current business situation and very good outlook

Current business Situation | Benelux | 1st Quarter 2017

Expectations | Benelux | 1st Quarter 2017

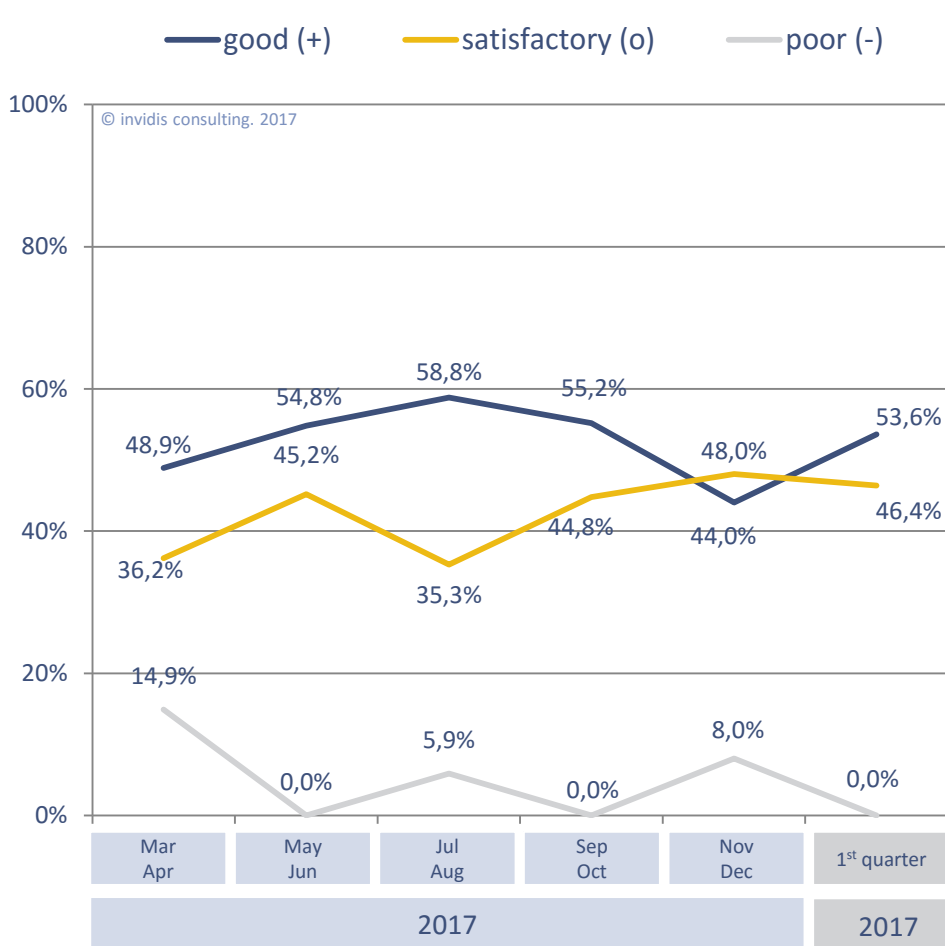


Fig. 2: DBCI Benelux 1st Quarter 2017 „Business Situation“ rolling 12 months, n=28

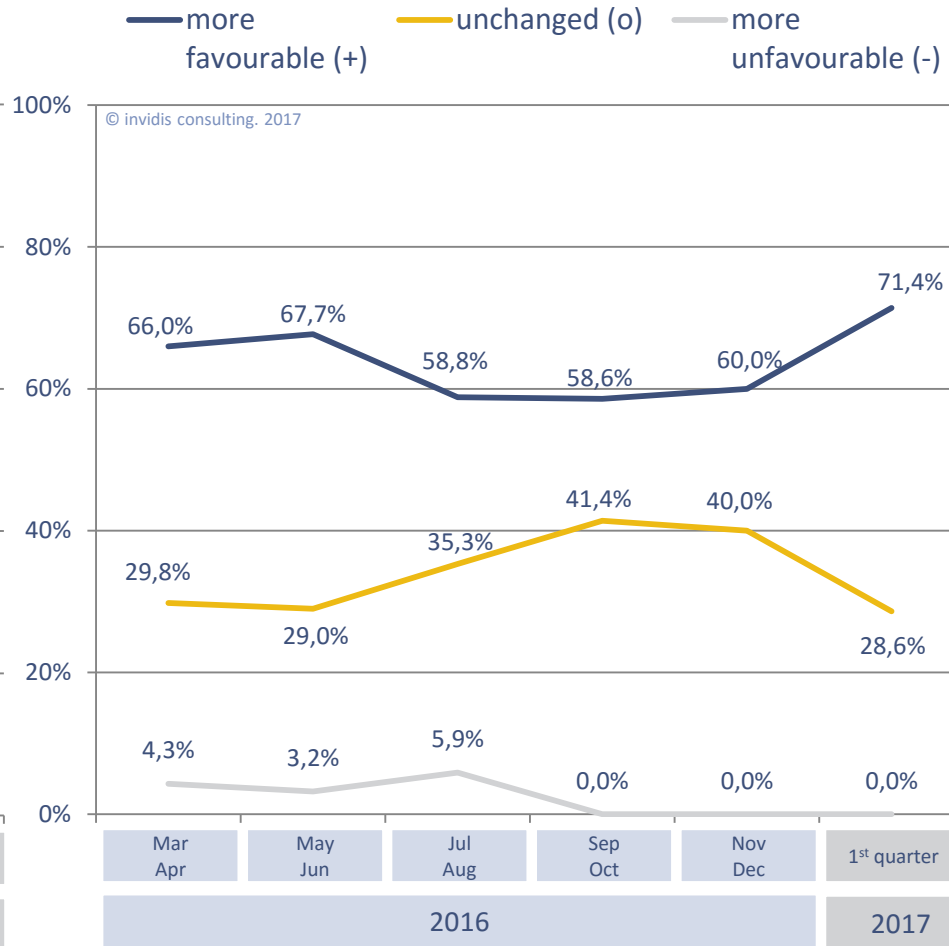


Fig. 3: DBCI Benelux 1st Quarter 2017 „Expectations“ rolling 12 months, n=28

Hirings 2016 | Digital Signage creates many new jobs

- **50,0%** of all companies in the Digital Signage market in the Benelux region have hired new staff in 2016. In total between **50-100 new jobs** were created.
- The digital transformation in private and business life is responsible for an unbroken positive trend in the IT industry. Overall this has developed into 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 digital experts on all management levels. Particularly qualified project managers and key account positions are in demand. But also technicians, programmers and administrators can be difficult to hire in highly industrialised regions where the competition for talent is strong.
- The increasing expansion in vertical markets by Digital Signage companies leads to a demand for more professionals from different industry branches.

Company growth in new jobs created 2016

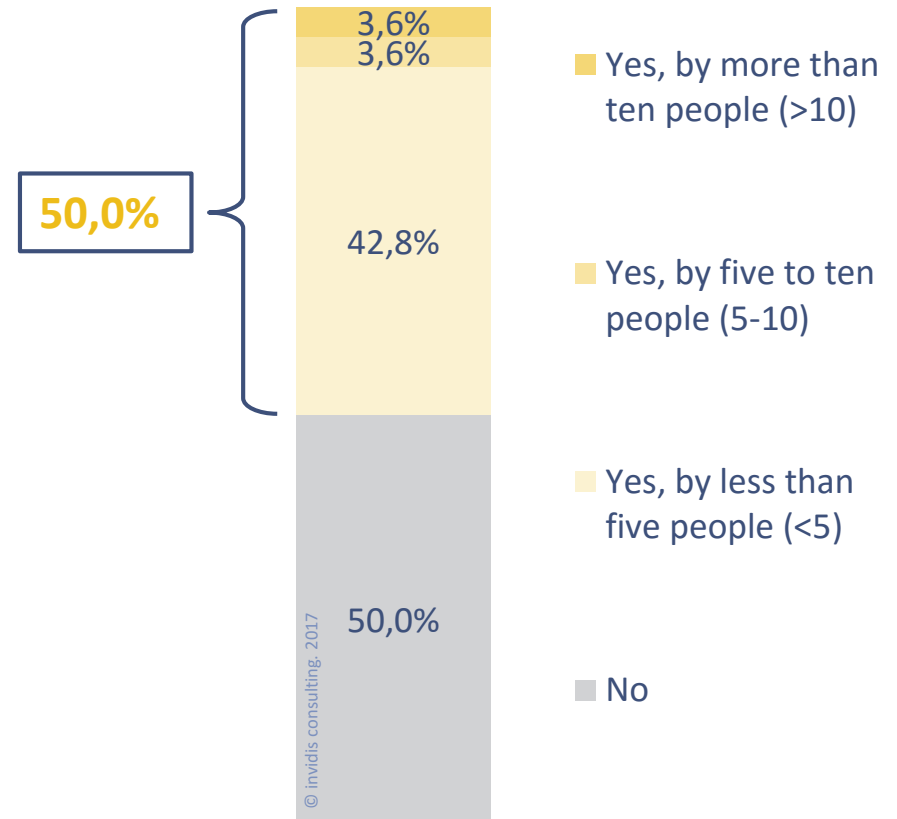


Fig. 4: DBCI Benelux 1st Quarter 2017 "Hirings 2016", n=28

## Roadmap 2017 & Contact

<b>2017</b>
January
February
March
April
May
June
July
August
September
October
November
December

← 2<sup>nd</sup> quarter | 2017

← 3<sup>rd</sup> quarter | 2017

← 4<sup>th</sup> quarter | 2017

- The DBCI has recalibrated its iteration from a two month period to a three month period starting in 2017
- The next survey will take place in calendar weeks 14-15 of 2017. The next planned publication date will be the first week of May 2017
- 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 2017. For further information please contact Daniel Russell.

### **invidis consulting**

invidis is a renowned boutique consulting and research house based in Munich. Delivering actionable information and advise to customers across EMEA.

### **Contact**

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DSS | The Digital Signage Summit series



- «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 Orlando | Orlando: 14/16. June 2017
  - DSS Europe | Munich: 5.-6. July 2017
  - DSS MENA | Dubai: September 2017
  - DSS Russia | Moscow: October 2017
  - DSS Africa | Johannesburg: October 2017
- More information at [digitalsignagesummit.org](http://digitalsignagesummit.org)