

Spain

Portugal

July | August 2014

**DBCI**



Digital Signage & DooH  
Business Climate Index

The pulse of the Digital Signage  
and DooH industry



**invidis**  
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invidis research  
2014 ES 400

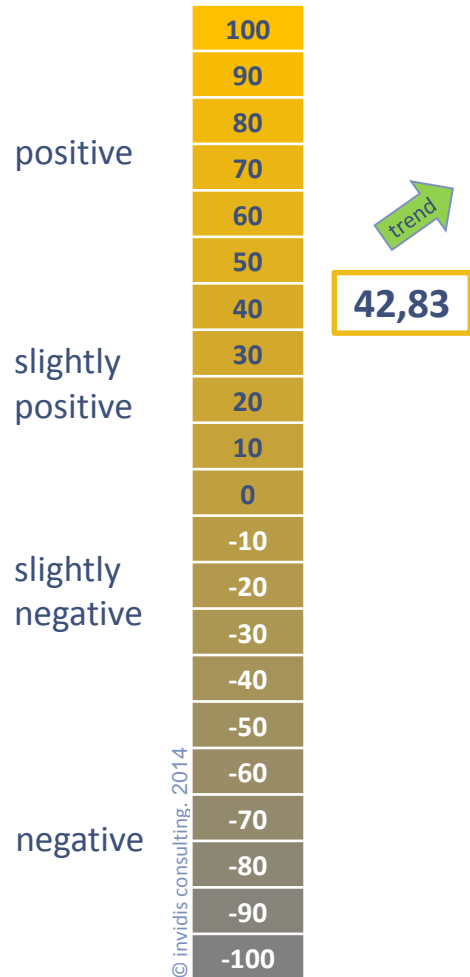


## DBCI - Introduction

- The OVAB Europe **D**igital **S**ignage **B**usiness **C**limate **I**ndex (DBCI) is the leading European indicator of the economic development of the Digital Signage and Digital-out-of-Home industry
- It is compiled every two months by invidis consulting in cooperation with OVAB Europe
- Questions:
  - Current business situation: “good”, “satisfactory” or “poor”
  - Expectations for the next six months: “more favourable”, “unchanged” or “more unfavourable”
- **Spain & Portugal** – first poll July/August 2014:
  - Spain and Portugal is the 9<sup>th</sup> largest market in Europe for Digital Signage (in units of public displays)
  - DBCI Spain: **43,83** base points
  - **76,2%** have a **positive outlook** for their business within the next six months
  - **Only 14,3%** rate their current business situation as **negative**



# Digital Signage industry with bright outlook



- The digital Signage Business Climate Index Spain & Portugal has been polled for the first time in 2014. The index stands at 42,83 base points
- The positive trend of the DBCI reflects the positive business sentiment of the Digital Signage industry in Spain and Portugal
- After more than two years of recession the general economy has been growing since the third quarter in 2013. The improving job market and more confident consumers have created a gradually increasing dynamism concerning domestic investments in 2014
- The higher cashflow gives the companies leverage within their strategic budgets. With most Digital Signage projects dependent on these budgets, the market participants have currently very positive expectations for the near future
- As the consumer spendings are increasing, the additional question has shown Retail and Shopping Malls are the two most important vertical markets for Digital Signage in Spain and Portugal

Survey facts

- Participants: n=21
- Region: Spain & Portugal
- Time frame: 2014 calendar weeks 28 & 29

Fig. 1: DBCI ES/PT July/August 2014, n=21



## General positive and solid current business situation

**Question:** How do you rate the current business situation for your products / services in the field of Digital Signage?

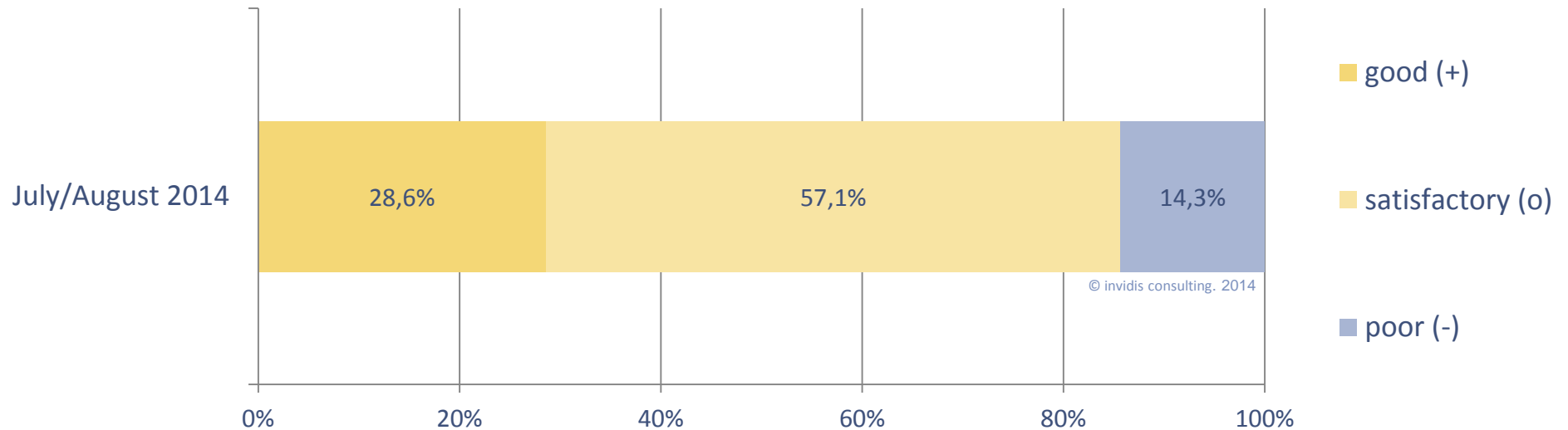


Fig. 2: DBCI ES/PT July/August 2014 "business situation", n=21

 High expectations for the next six months

**Question:** What are your expectations for the next six months?

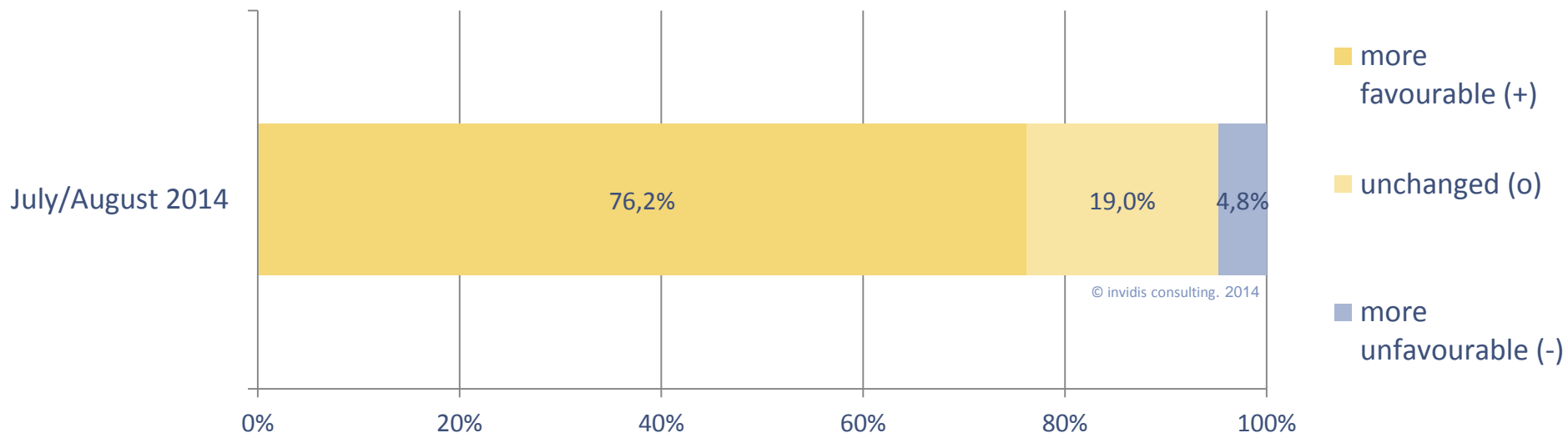


Fig. 3: DBCI ES/PT July/August 2014 "business expectations", n=21



## Additional Research | Retail is the most important vertical market

**Question:** In which vertical markets has your company rolled out the most projects in 2013?

- **Retail** is with 32,6% 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
- **Shopping Malls** is the second biggest vertical market, with 19,6% of all Digital Signage revenues generated. New shopping malls are being equipped regularly with Digital Signage solutions, not only for the retail outlets, but also for information, way finding and marketing by the mall operator
- **Corporate Communication** is the third biggest vertical market. It has grown exponentially over the last few years. The digitization of employee communications is now seen as a sustainable investment by many companies

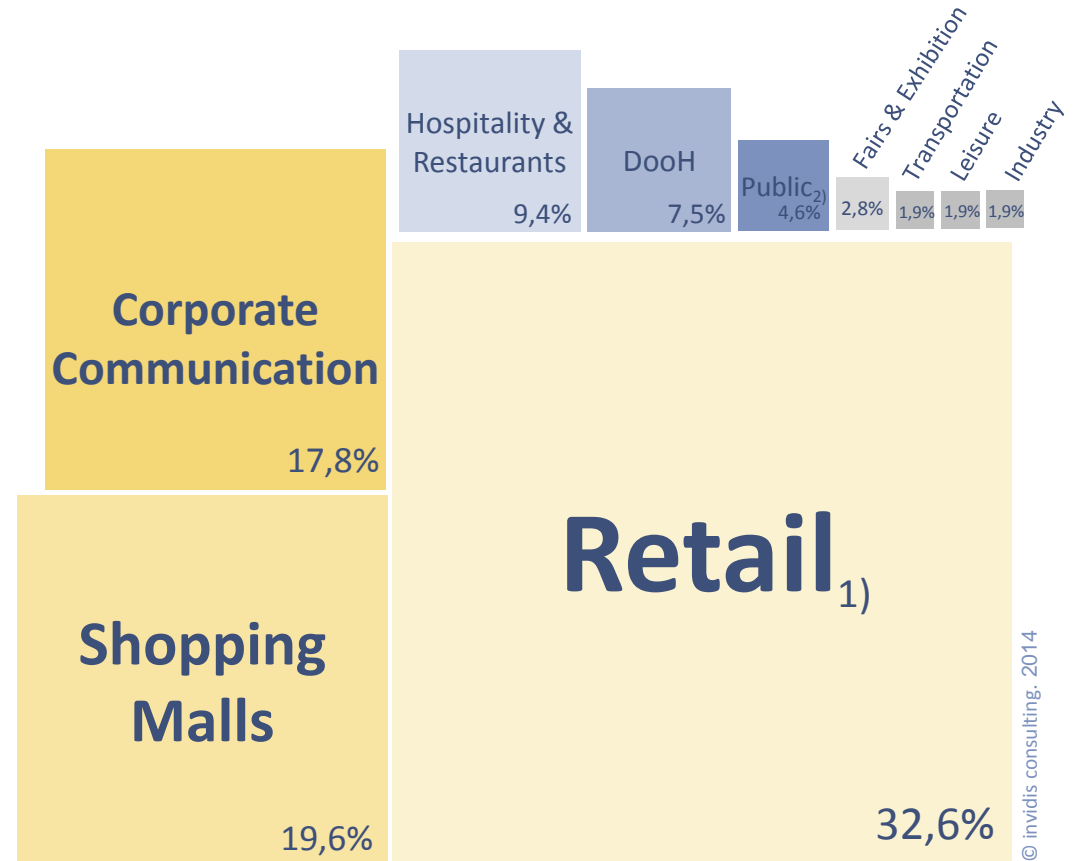


Fig. 4: DBCI SP/PT July/August 2014 “vertical markets 2013”, n=19

1) food/non food, banking, insurance, telecommunication

2) government & education



## Roadmap 2014 & Contact

2014	
January	
February	
March	
April	
Mai	
Jun	
July	
August	
September	← <b>Sep./Oct.   18.09.</b>
October	
November	← <b>Nov./Dec.   10.11.</b>
December	

- The next survey will take place in calendar weeks 34 & 35 of 2014.
- The next planned publication date will be the 18<sup>th</sup> September 2014.
- 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 2014. For further information please contact Daniel Russell.

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**Save the Date!**  
**17. - 18. September**  
**2014**



# digital signage

## 8th MUNICH CONFERENCE

17 – 18 September 2014  
Kempinski Hotel Airport Munich

