

Spain

Portugal

November | December 2014

DBCI

The pulse of the Digital Signage
and DooH industry



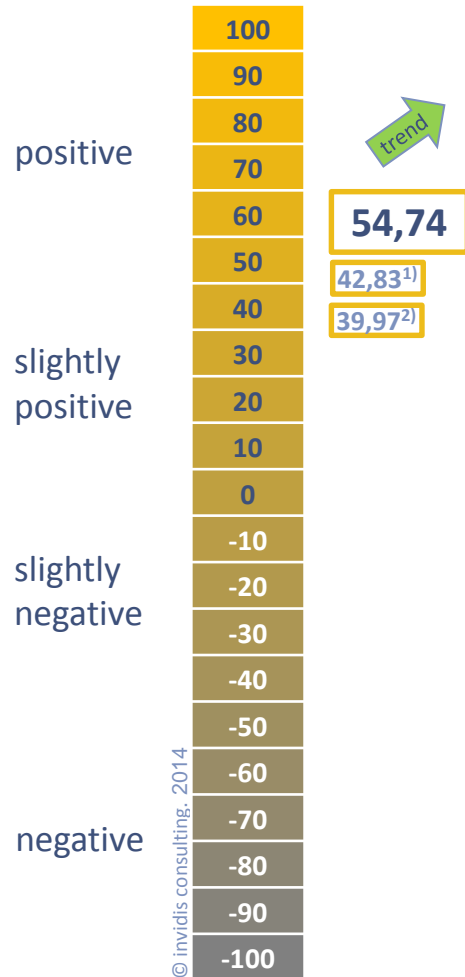
Digital Signage & DooH
Business Climate Index



invidis research
2014 ES 600



Digital Signage industry with great expectations for 2015



- The Digital Signage Business Climate Index Spain & Portugal has been polled for the third time in 2014. The index has grown strongly to a very positive level with an increase of 14,77 base points to stand at 54,74 base points
- The positive trend of the DBCI reflects the positive business sentiment of the Digital Signage industry in Spain and Portugal. The market participants show a high satisfaction with the current business situation and have very positive expectations for the next six months
- After three years of regressive investments, in the third quarter of 2014 many blue chip companies have shown increasing interest in Digital Signage and have published several RFPs

Further Research

- The still very high costs for UHD content has a dampening effect on the expectations for full UHD projects in the next year
- Falling hardware prices and availability of plug-and-play solutions have resulted in a high demand for entry-level Digital Signage

Survey facts

- Participants: n=21
- Region: Spain & Portugal
- Time frame: 2014 calendar weeks 47 & 48

Fig. 1: DBCI ES/PT November/December 2014, n=21

1) DBCI ES/PT July | August 2014

2) DBCI ES/PT September/October



Current business situation rated very good by the market participant

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

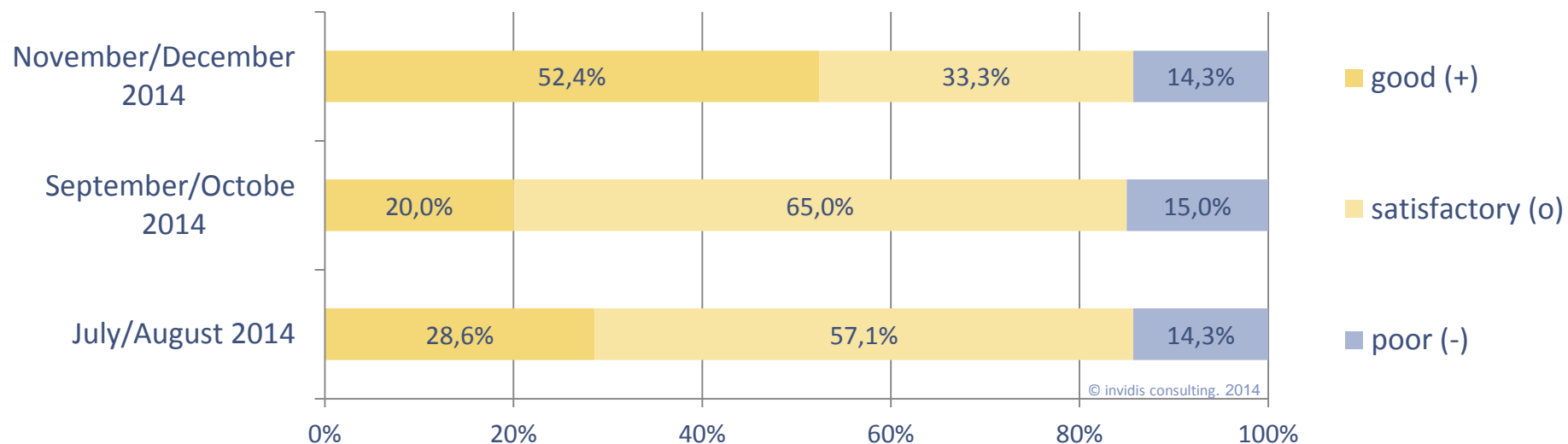


Fig. 2: DBCI ES/PT November | December 2014 "business situation", n=21

 Rising expectations for the next six months

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

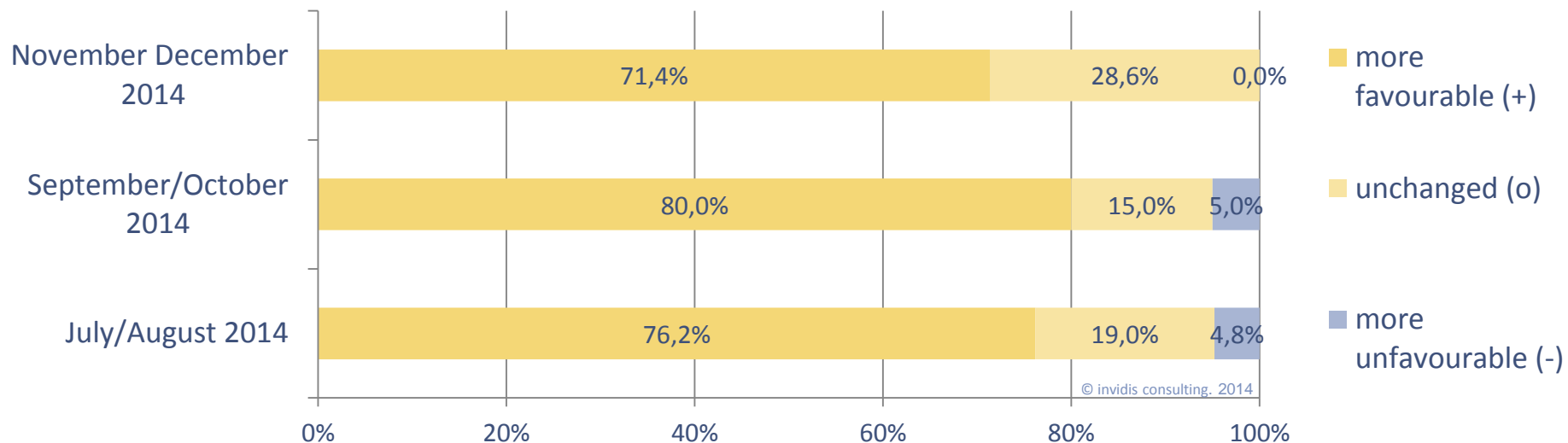


Fig. 3: DBCI ES/PT November | December 2014 "business expectations", n=21



Further research | Low market share for UHD, but high demand for entry level signage

Market share UHD products in Digital Signage projects 2015

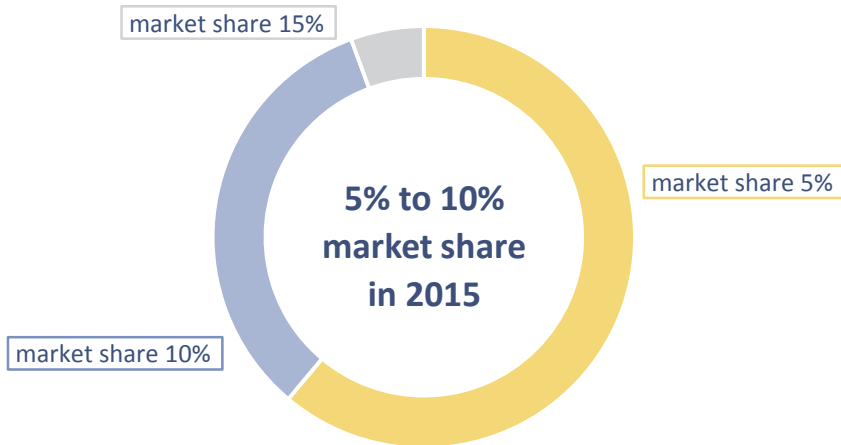


Fig. 4: DBCI ES/PT November | December 2014
"market share UHD 2015", n=18

Question: How do you expect will the market for UHD products (displays, media player, software, content) evolve over the next 12 months? The market share will be at ...

The still very high costs for UHD content has a dampening effect on the expectations for full UHD projects in the next year

Demand for entry-level products in Digital Signage projects 2014

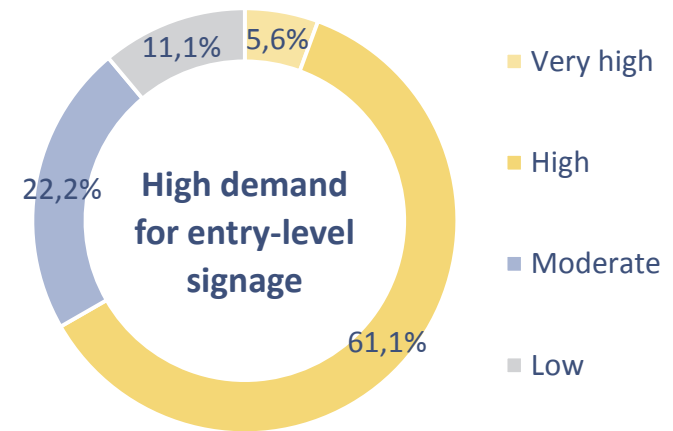


Fig. 5: DBCI ES/PT November | December 2014
"demand for entry level products 2014", n=18

Question: How much demand did your customers have for entry-level products (hardened consumer displays, cost effective media players, standard software, content shops & templates) within the last 12 months?

Falling hardware prices and availability of plug-and-play solutions have resulted in a high demand for entry-level Digital Signage



Roadmap 2015 & Contact

2015	
January	← Jan./Feb. 02. 02.
February	
March	← Mar./Apr. 23. 03.
April	
Mai	← May/Jun. 18. 05.
Jun	
July	← Jul./Aug. 20. 07.
August	
September	← Sept./Oct. 17. 09.
October	
November	← Nov./Dec. 26. 11.
December	

- The next survey will take place in calendar weeks 3-4 of 2015.
- The next planned publication date will be the 2nd February 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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