

Spain

Portugal

January | February 2015

**DBCI**



Digital Signage & DoOH  
Business Climate Index

The pulse of the Digital Signage  
and DoOH industry



**invidis**  
CONSULTING

invidis research  
2015 ES 100



# Digital Signage with slow start, but high expectations in 2015

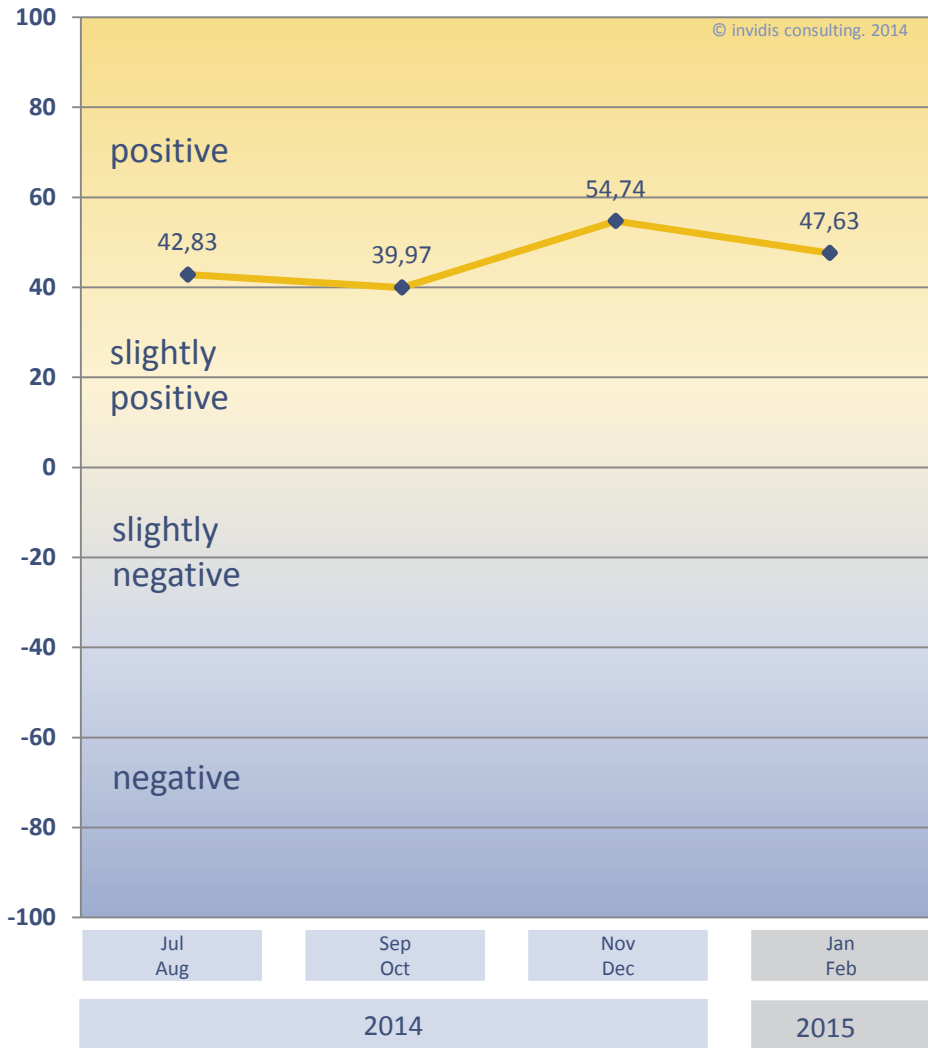


Fig. 1: DBCI ES/PT January | February 2015 „Index“, n=21

- The Digital Signage Business Climate Index Spain & Portugal has been polled for the fourth time. The index has declined slightly to a positive level with an decrease of 7,11 base points to stand at 47,63 base points
- The DBCI has stabilised on a high level and reflects the positive business sentiment of the Digital Signage industry in Spain and Portugal. The market participants are satisfied with the current business situation and have very positive expectations for the next six months
- High demand from the customer side, especially by blue chip companies has been driving the market in Spain and Portugal for the last year. The Digital Signage providers expect to convert the interest and realise many projects in 2015

### Further Research

- After three years of downsizing and reducing employees since 2010, 53,9% percent of all companies in the Digital Signage Market have hired new staff in the last year

### Survey facts

- Participants: n=21
- Region: España & Portugal
- Time frame: 2015 calendar weeks 3-4



## Market participant satisfied by the current business situation

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

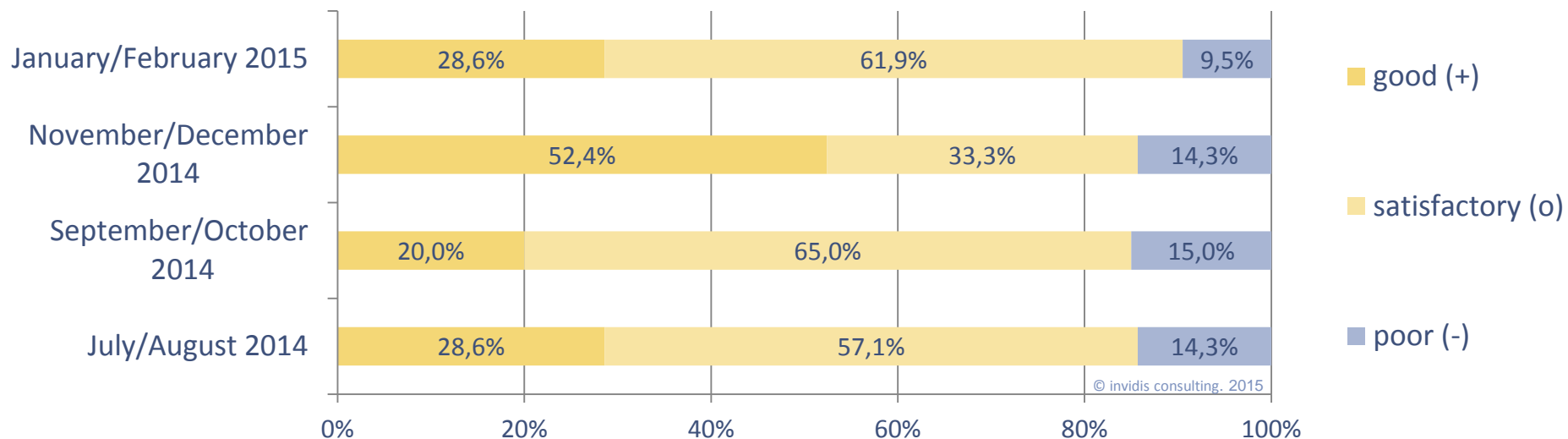


Fig. 2: DBCI ES/PT January | February 2015 "business situation", n=21



## Strong outlook for the summer

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

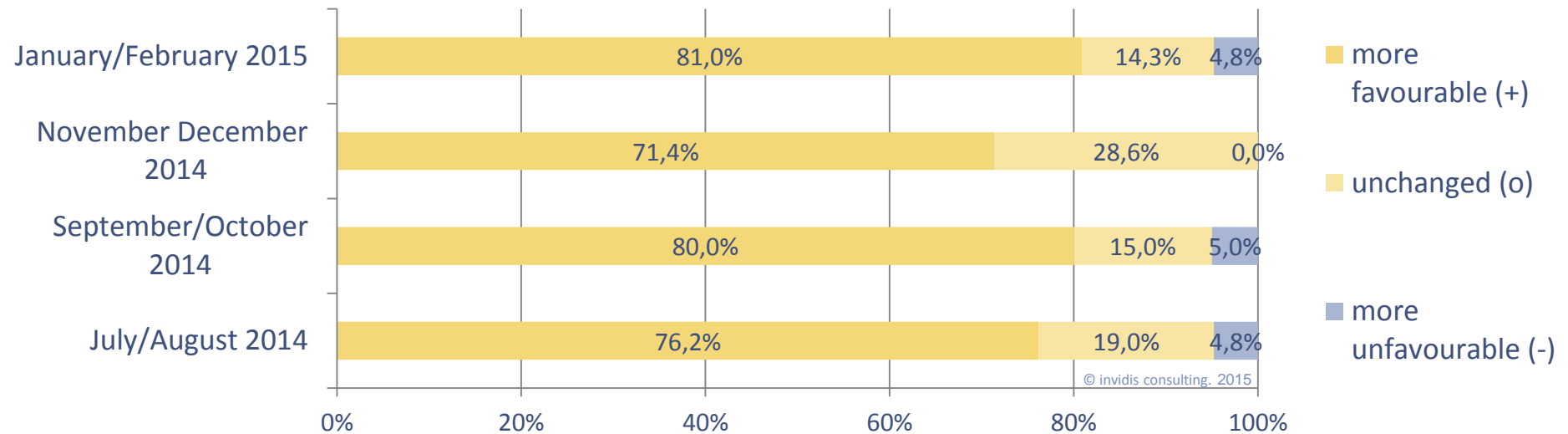


Fig. 3: DBCI ES/PT January | February 2015 "business expectations", n=21



## Hirings 2014 | Digital Signage creates many new jobs

- **53,9%** percent of all companies in the Digital Signage Market have hired new staff in the last year
- In the year 2014 between **40 to 60 new jobs** were created in the Digital Signage market in Spain and Portugal
- In the years after the crisis 2010, 2011 and 2012 many jobs were lost in the industry. However, with customer demand and the number of realised projects picking up in the last 12 months, the market participants need manpower to shoulder the workload
- As a whole there is a high demand for qualified personnel. Due to a growth strategy and restructuring the demand for personnel on a management level with new qualifications is very high (e.g. key account and project manager)
- The increasing expansion in vertical markets leads to a demand for more professionals from different industry branches by Digital Signage companies

### Company growth in new jobs created 2014

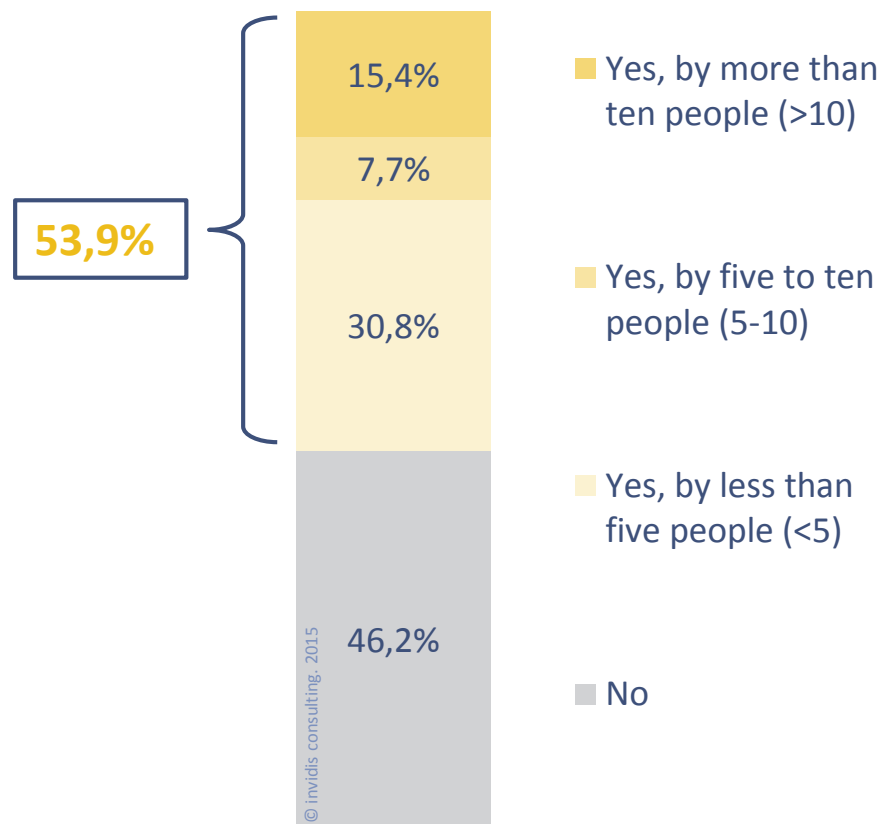


Fig. 4: DBCI ES/PT January/February 2015  
"Hirings 2014", n=13



**Tops 2014 | Strong growth in retail and for display sizes larger 55" in 2014**



Fig. 5: DBCI ES/PT January/February 2015 „Tops 2014“ size stands for statistical significance, n=13

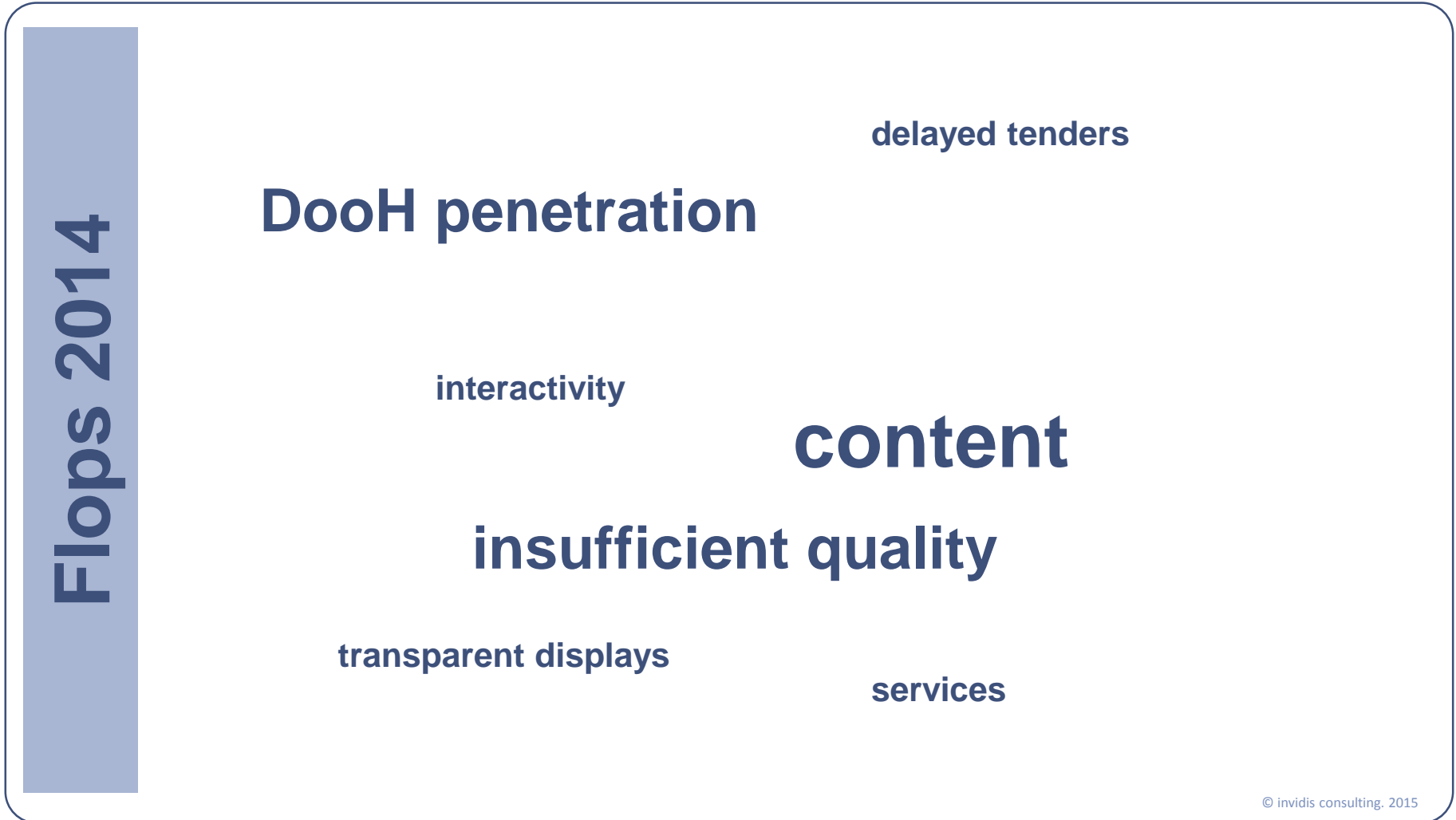


Fig. 6: DBCI ES/PT January/February 2015 „Flops 2014“ size stands for statistical significance, n=13

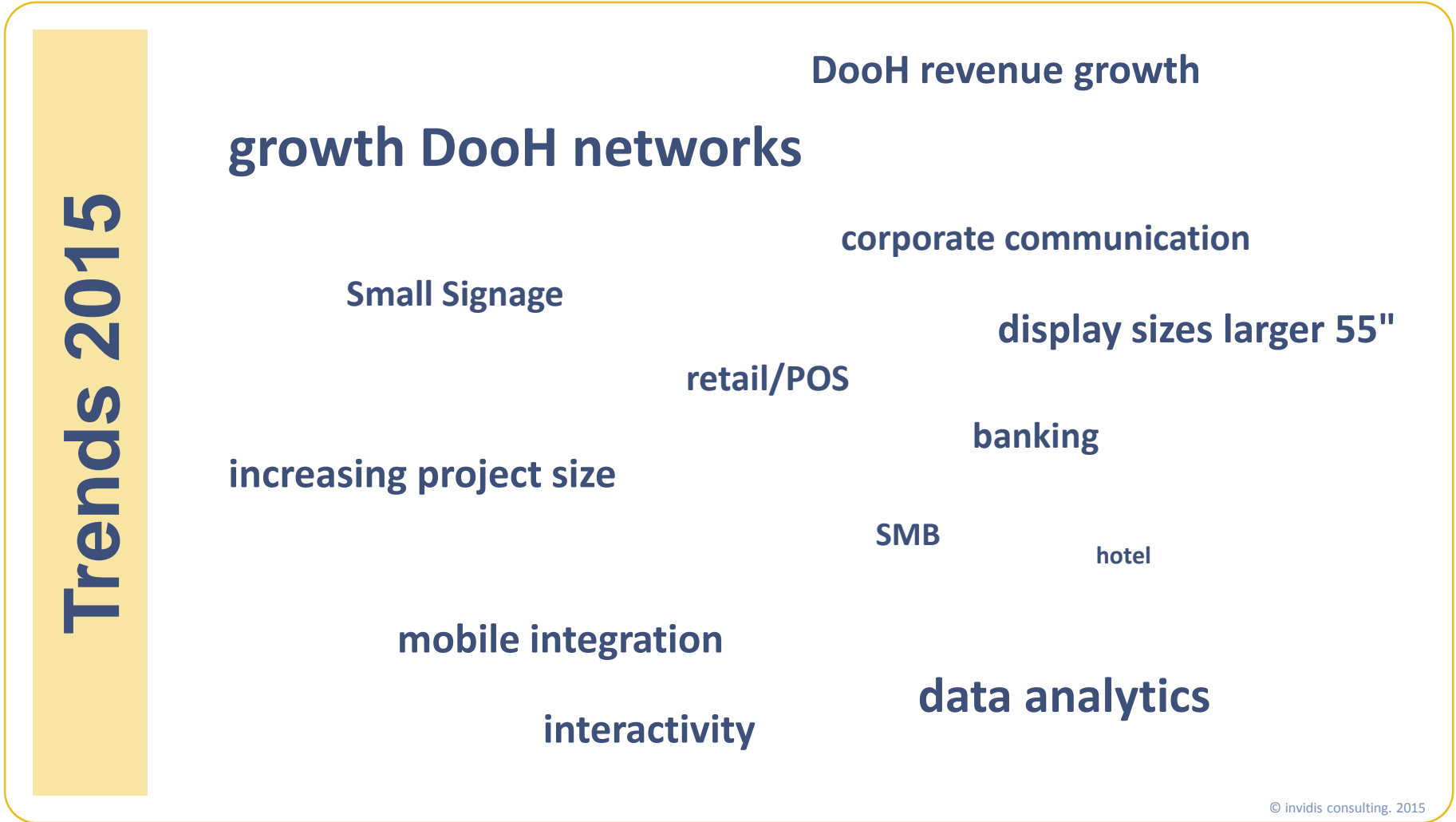


Fig. 7: DBCI ES/PT January/February 2015 „Trends 2015“size stands for statistical significance, n=13





## DBCI | Roadmap 2015 & Contact

2015	
January	
February	
March	← <b>Mar./Apr.   07.04.2015</b>
April	
May	← <b>May/Jun.   01.06.2015</b>
June	
July	← <b>Jul./Aug.   03.08.2015</b>
August	
September	← <b>Sept./Oct.   28.09.2015</b>
October	
November	← <b>Nov./Dec.   30.11.2015</b>
December	

- The next survey will take place in calendar week 11-12 of 2015
- The next planned publication date will be the 7<sup>th</sup> of April 2015
- 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 2015. For further information please contact Daniel Russell

### Contact

Daniel Russell | Junior Analyst  
 invidis consulting GmbH  
 Rosenheimer Str. 145e  
 81671 München  
[Daniel.Russell@invidis.com](mailto:Daniel.Russell@invidis.com)  
 Phone: +49 89 2000416-21  
 Mobile: +49 151 62438503  
 Fax: +49 1805 5224 301