

Spain  
Portugal  
March | April 2015

**DBCI**

**OVAB** Digital Signage & DooH  
Business Climate Index

The pulse of the Digital Signage  
and DooH industry



invidis research  
2015 ES 200



# Digital Signage back on positive trend after slow start in 2015

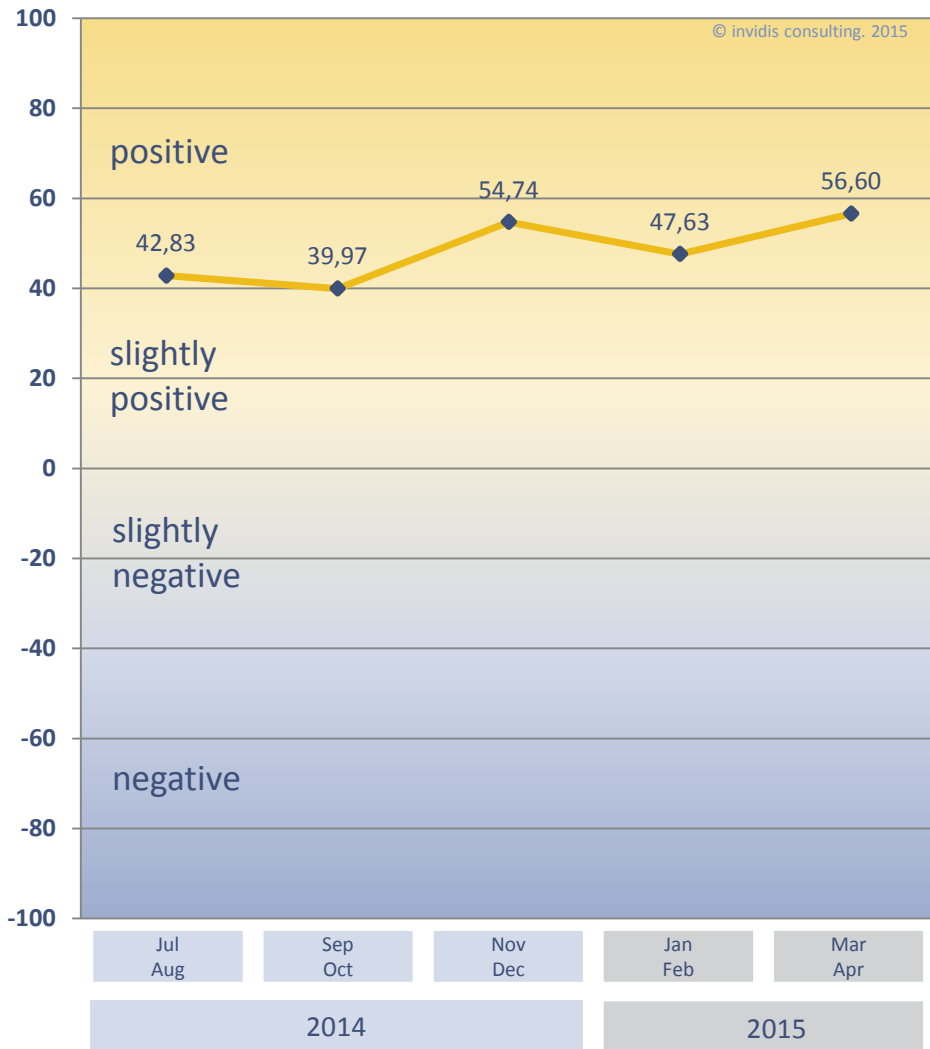


Fig. 1: DBCI ES/PT March | April 2015 „Index“, n=23

- The Digital Signage Business Climate Index Spain & Portugal has been polled for the fifth time. The index has increased to a very positive level with an growth of 8,97 base points to stand at 56,60 base points
- The current business situation has markedly increased since the last survey with over half of all market participants have a positive business sentiment. It shows that the little slump at the start of the year has been overcome by the industry
- At the same time the outlook for the next six months has become slightly more cautious, as the percentage of companies expecting a more favourable situation has dropped from 81% to 89%

### Further Research

- The vertical markets of Retail, Corporate Communication and Shopping Malls were responsible for over half of all Digital Signage revenues in 2014
- Clear growth in the DooH sector expected for the next 36 months. Particularly the development and installation of new networks will drive the media to a market share of between 15% and 20% of Outdoor.

### Survey facts

- Participants: n=23
- Region: España & Portugal
- Time frame: 2015 calendar weeks 12-13



# Market participants with markedly better business sentiment

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

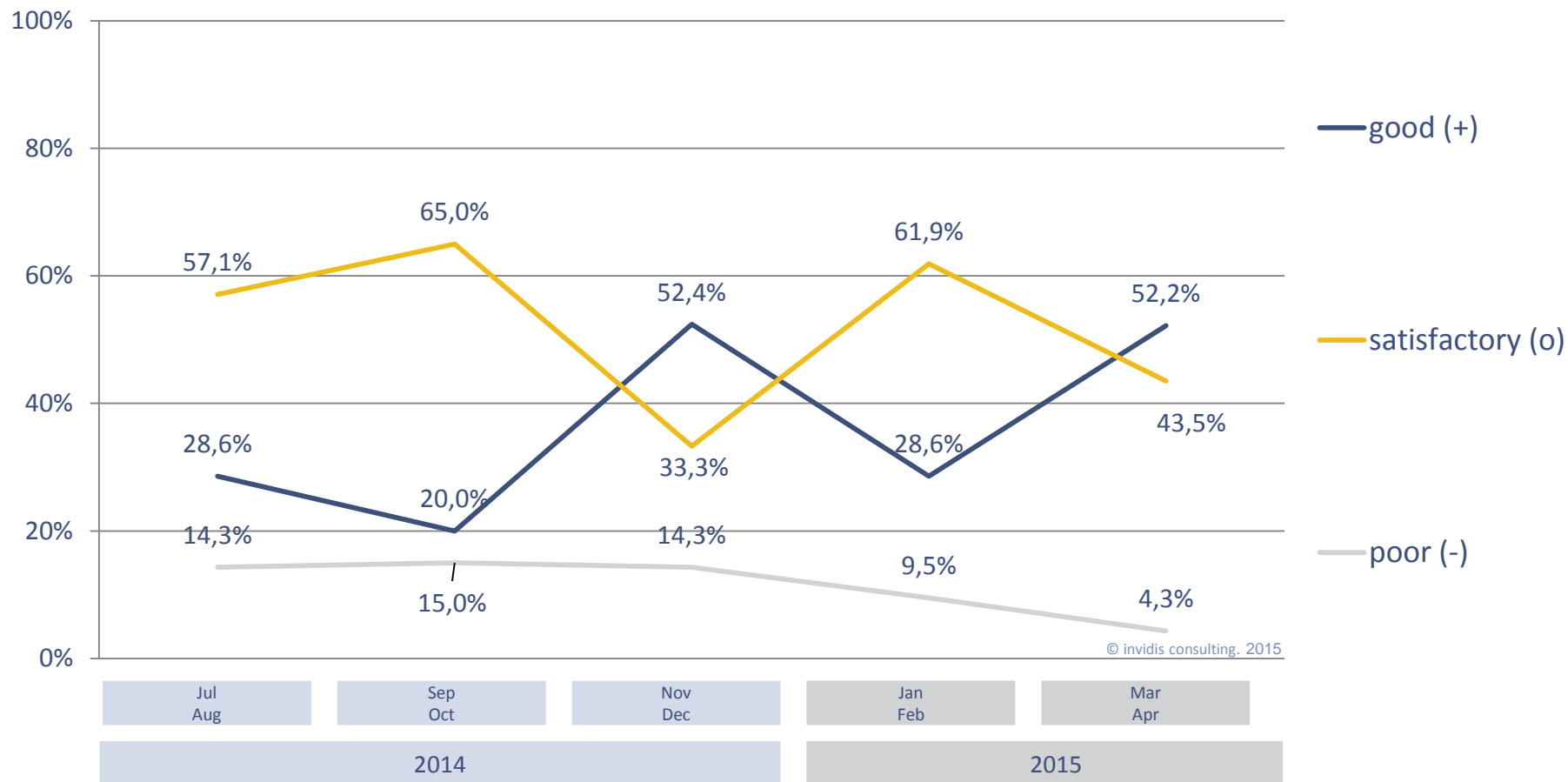


Fig. 2: DBCI ES/PT March | April 2015 "business situation", n=23



# Slightly more cautious outlook for the summer

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

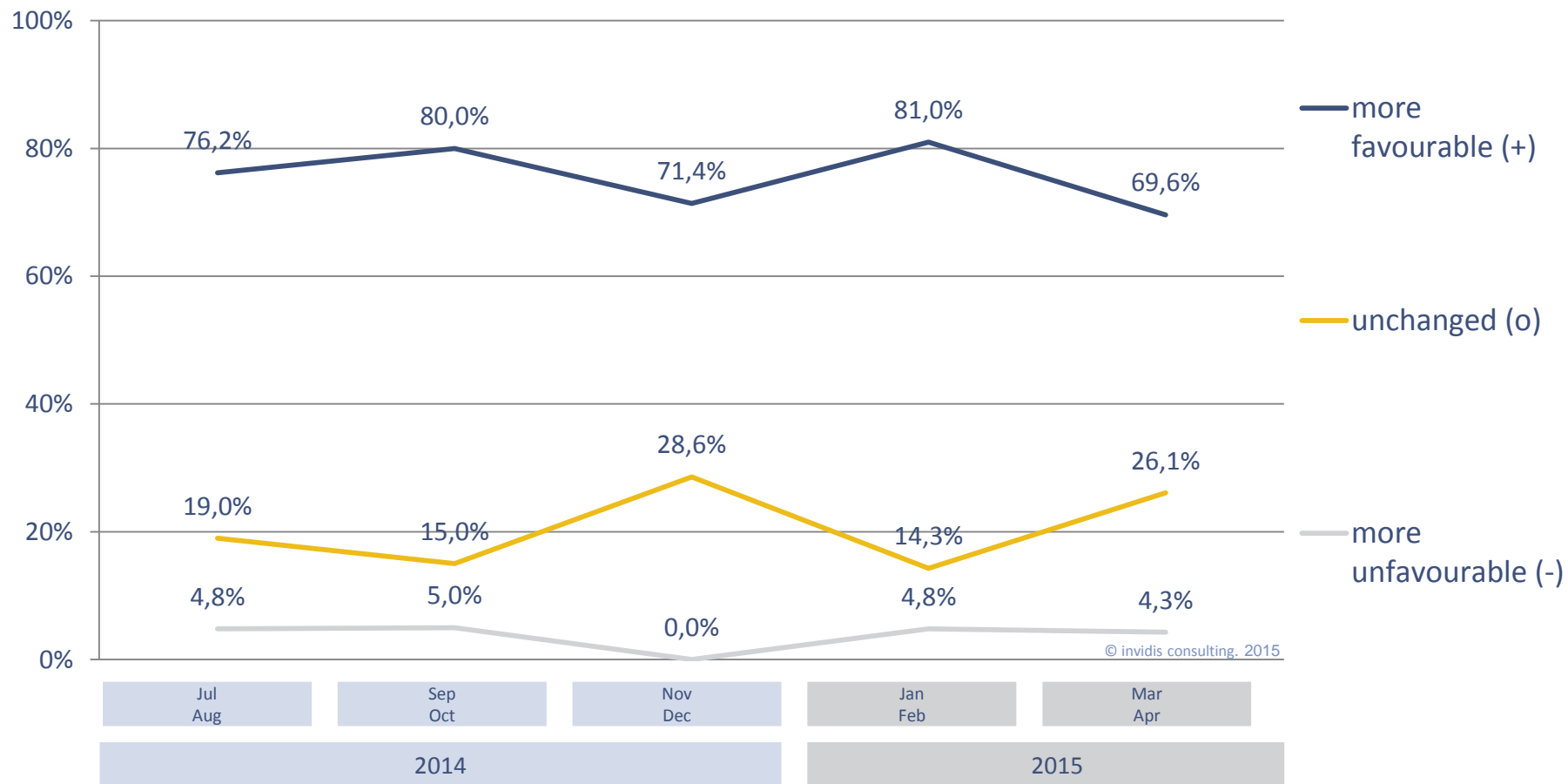


Fig. 3: DBCI ES/PT January | February 2015 "business expectations", n=23



## Further research | Retail remains top, strong demand for Corporate Communications

**Question:** We would like to assess the dynamic for Digital Signage in the different vertical markets. In which vertical markets has your company realised the most projects in 2014? Please rate the Top 3 vertical markets?

- Retail is with approximately one fifth of all Digital Signage revenues still 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. However this segment has lost market share as other verticals become more important in the last year
- The corporate communication vertical market has seen a positive trend over the last few years. With rising IT budgets, the digitization of employee communications is now seen as a sustainable investment by many companies
- Shopping Malls is the third biggest vertical market. Since 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, consistent revenues can be generated here

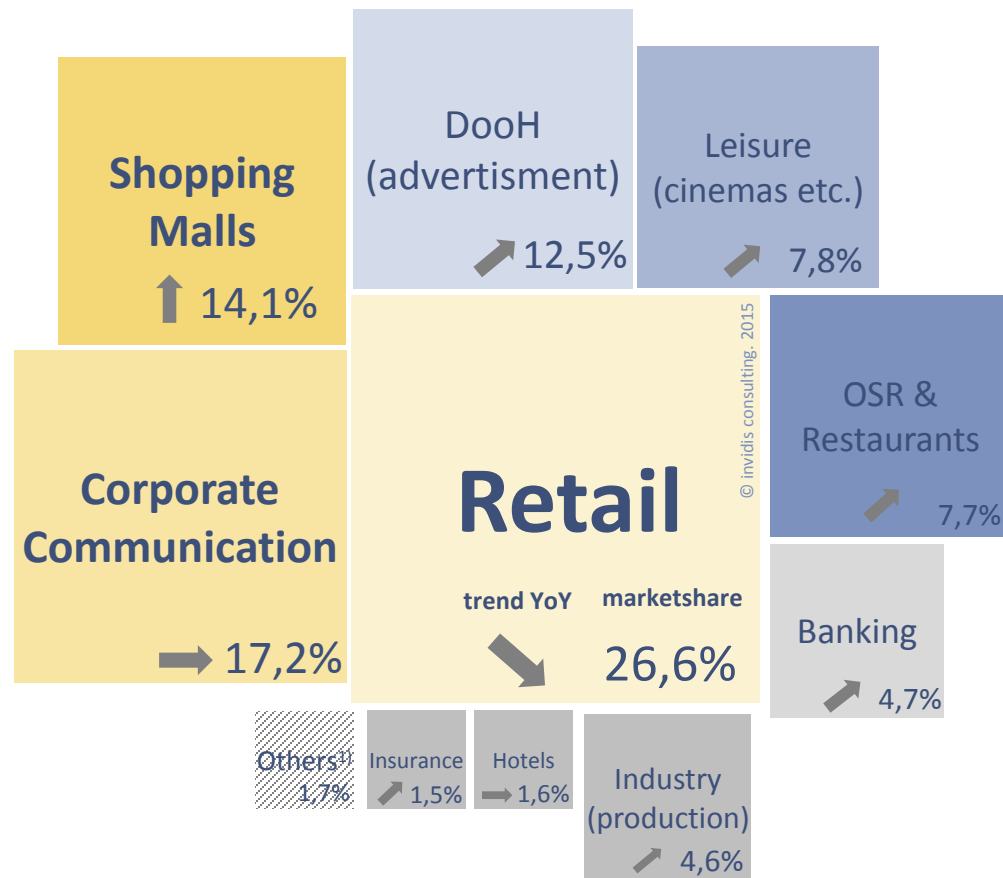


Fig. 5: DBCI ES/PT March/April 2015 "Top 10 vertical markets 2014", n=16  
1) Education, Healthcare, Telecommunication, Tourism, Fairs & Exhibition, Public (government)



Further research | Clear growth for DooH expected in the next 36 months

Forecast market share DooH in 36 months

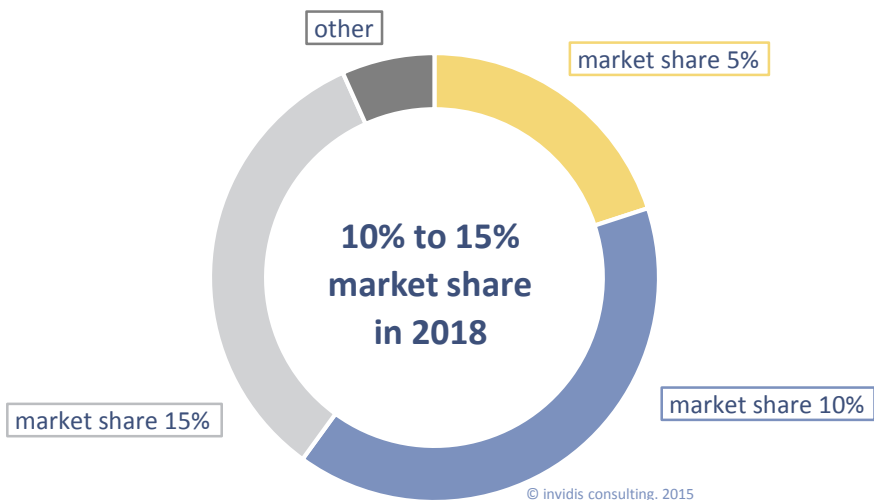


Fig. 6: DBCI ES/PT March | April 2015 "market share DooH in 36 months", n=15

**Question:** How high, do you estimate, will the market share of DooH within Out of Home grow in three years?

The market participants see a clear growth potential in DooH. They expect that the market share of DooH within Out of Home will reach between 10% and 15% by 2018

Reasons for future DooH growth

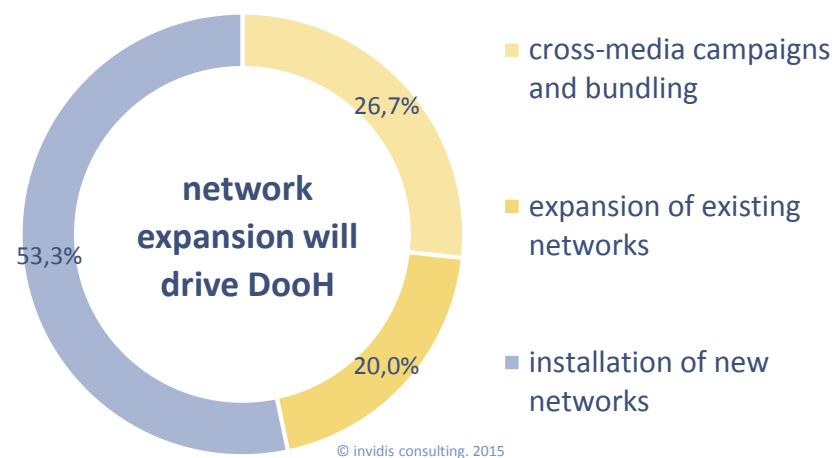


Fig. 7: DBCI ES/PT March | April 2015 "growth reasons DooH", n=15

**Question:** Which factors will primarily lead to an increasing market share of DooH?

First and foremost growth in DooH will be achieved by the installation of new networks. On the other hand many market participants also see good potential for bundling DooH with other digital media. Whereas the existing networks almost look to have reached their maximum penetration





## DBCI | Roadmap 2015 & Contact

2015	
January	
February	
March	
April	
May	May/Jun.   2015/06/01
June	
July	Jul./Aug.   2015/08/03
August	
September	Sept./Oct.   2015/09/28
October	
November	Nov./Dec.   2015/11/30
December	

- The next survey will take place in calendar week 19-20 of 2015
- The next planned publication date will be the 1<sup>st</sup> of June 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

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