

Spain
Portugal
May | June 2015

DBCI

OVAB Digital Signage & DooH
Business Climate Index

The pulse of the Digital Signage
and DooH industry



invidis research
2015 ES 300



Digital Signage market with overall positive sentiment for 2015

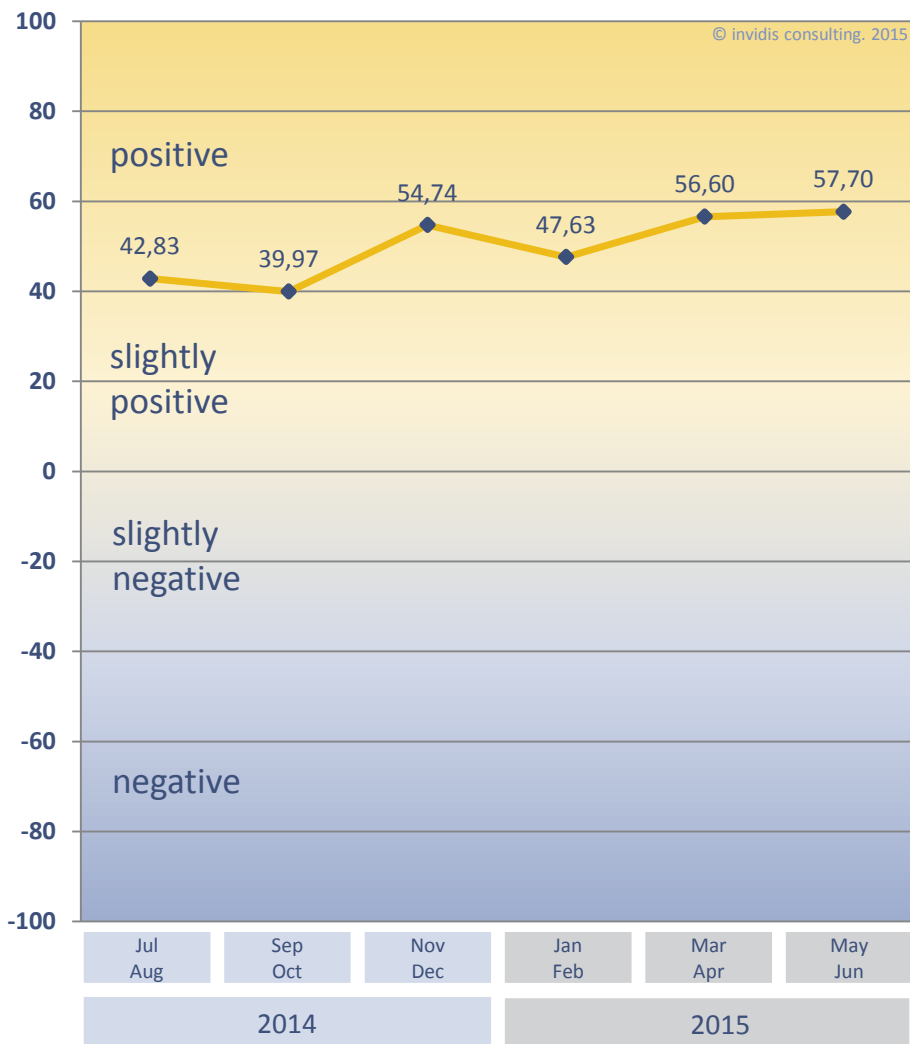


Fig. 1: DBCI ES/PT May | June 2015 „Index“, n=22

- The Digital Signage Business Climate Index Spain & Portugal has further increased with an growth of 1,10 base points to stand at 57,70 base points
- The DBCI reflects the very positive current business sentiment of the Digital Signage industry in Spain & Portugal
- All of the polled companies are satisfied or rate their current business climate with *good*.
- With 69% the answers for *more favourable* business conditions within the next six month has remained flat. However, more companies than in the first quarter expect no big movement in the market until the end of the year.

Further Research

- There are high hopes for the market potential of LED display technology for outdoor installations. The Digital Signage and Digital-out-of-Home companies polled in the DBCI all see a high to very high potential for LED display technology in competition to LCD displays within the next 24 months

Participants: n=22; Region: España & Portugal: Time frame: 2015 calendar weeks 19-20



Market participants with robust business sentiment

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

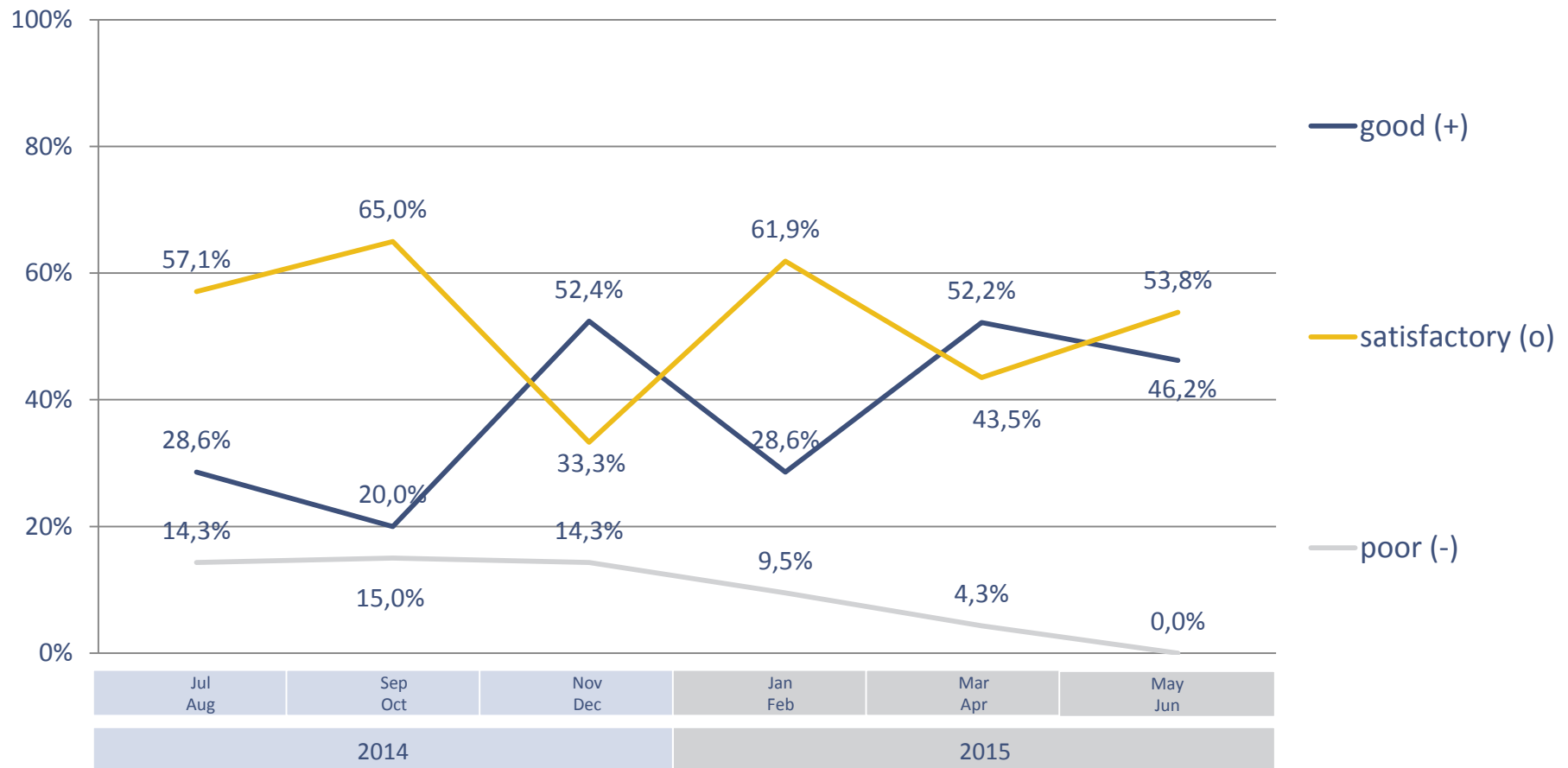


Fig. 2: DBCI ES/PT May | June 2015 "business situation", n=22



Digital Signage industry with positive outlook for the second half of 2015

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

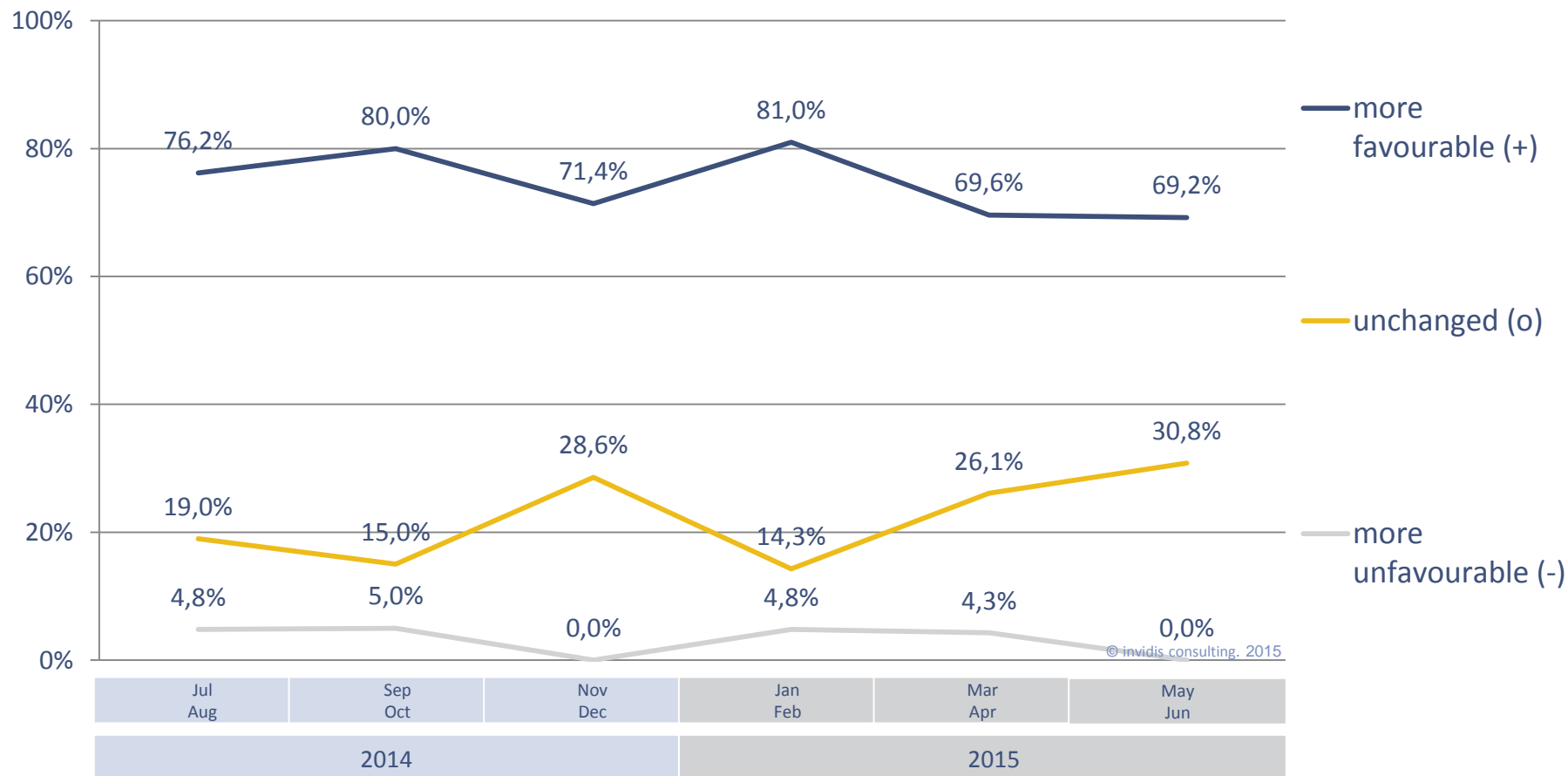


Fig. 3: DBCI ES/PT May | June 2015 "business expectations", n=22



High hopes for market potential of outdoor LED display technology

Question: LED display technology has developed positively over the last years. Improved quality, smaller pixel pitch and lower prices have increased the acceptance in the market. How high do you see the potential for LED display technology in competition to LCD display technology in the next 24 months?

- The Digital Signage and Digital-out-of-Home companies polled in the DBCI all see a high to very high potential for LED display technology in competition to LCD displays within the next 24 months
- Over the last years, improvements in LED display technology have resulted in a lower pixel pitch. Together with a rapid increase in competition and hence falling prices the market potential of LED display technology will further increase in the next years. The big market players like Samsung and LG have noted this trend and duly seek a fast market entrance.
- Still the survey shows the very high potential is still only attributed to outdoor installations. For indoor solutions the low viewing distance dictates a very low pixel pitch and hence high costs.

LED display technology outlook 2016

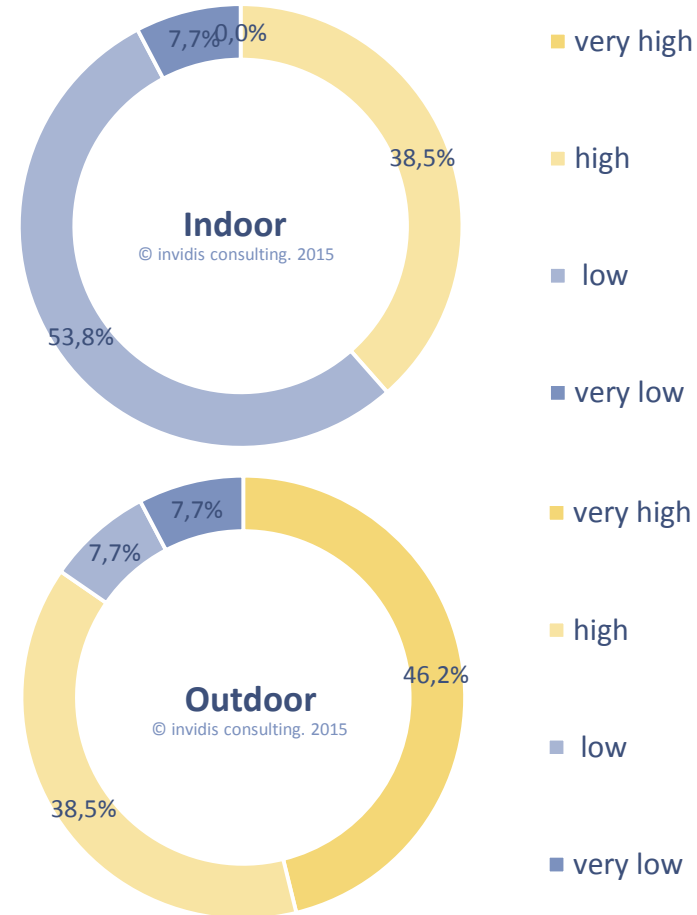


Fig. 4: DBCI ES/PT May | June 2015 "LED display technology outlook 2016", n=19



DBCI | Roadmap 2015 & Contact

2015	
January	
February	
March	
April	
May	
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 28-29 of 2015
- The next planned publication date will be the 3rd of August 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

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