Spain
Portugal
September | October 2015

DBCI

Digital Signage & DooH Business Climate Index

The pulse of the Digital Signage and DooH industry

invidis CONSULTING

invidis research
2015 ES 500

Digital Signage market continuous the positive trend

Fig. 1: DBCI ES/PT September | October 2015 "business situation", n=20

- The Digital Signage Business Climate Index Spain & Portugal has further increased since the last survey in July with a growth of 4,40 base points to stand at 67,50 base points
- While the current business situation is assessed positively by the market participants, the outlook for the next six months is rising to a very optimistic level.
- Over 60% of the polled companies rate their current business situation as *good* and 70% expect *more favourable* conditions in the near future.

Further Research

- 85% of the polled companies in Spain and Portugal expect to have a growth in revenues in 2015 compared to 2014
- Still 20% of all polled companies had to accept a decline in revenues in the first six months of 2015. However some of those companies are expecting to have balance the losses at the end of the year

Participants: n=20; Region: España & Portugal: Time frame: 2015 calendar weeks 36-37

Market participants with consitend good business sentiment

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

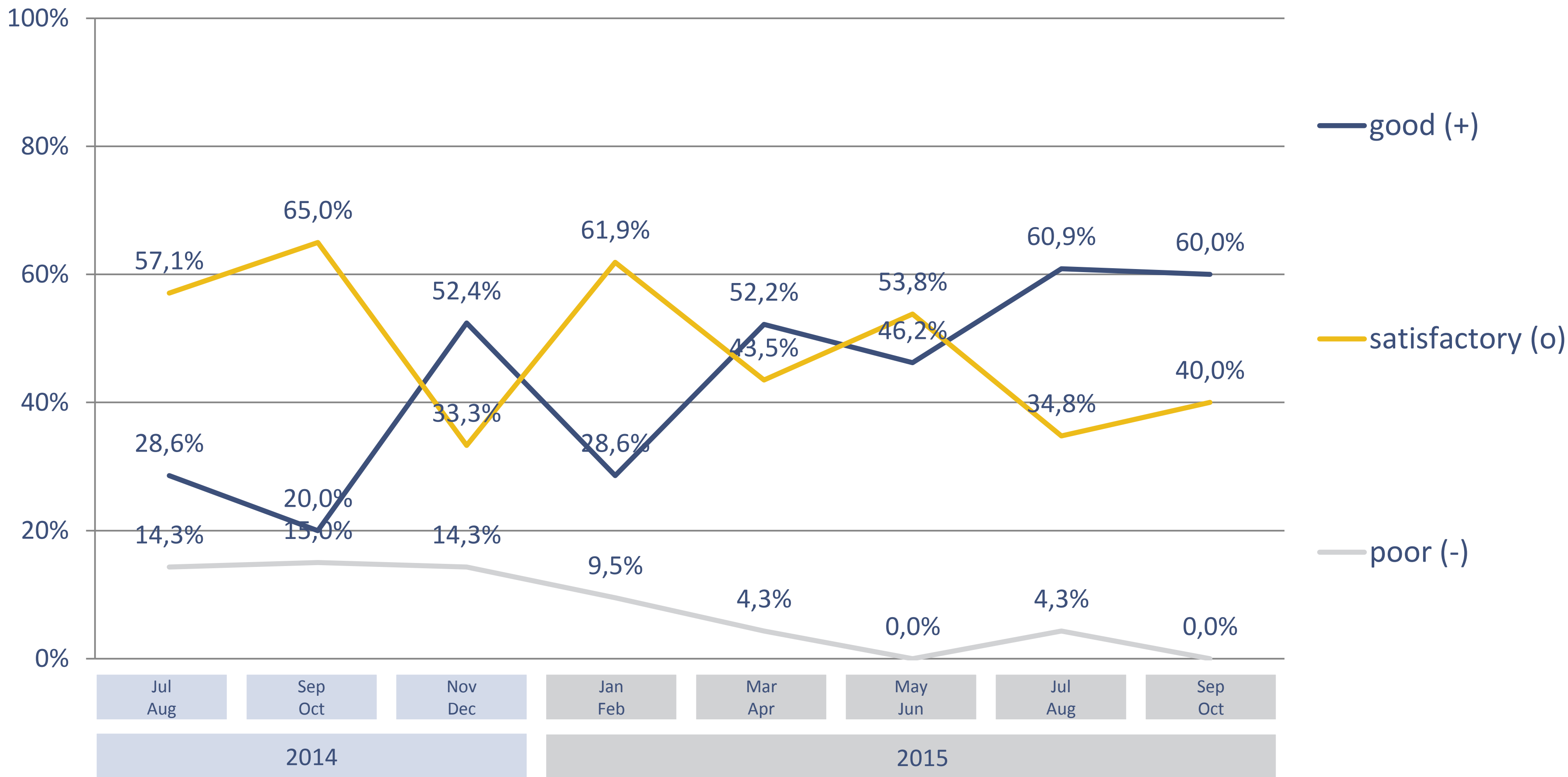


Fig. 2: DBCI ES/PT September | October 2015 "business situation", n=20

Digital Signage industry with very good sixth month outlook

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

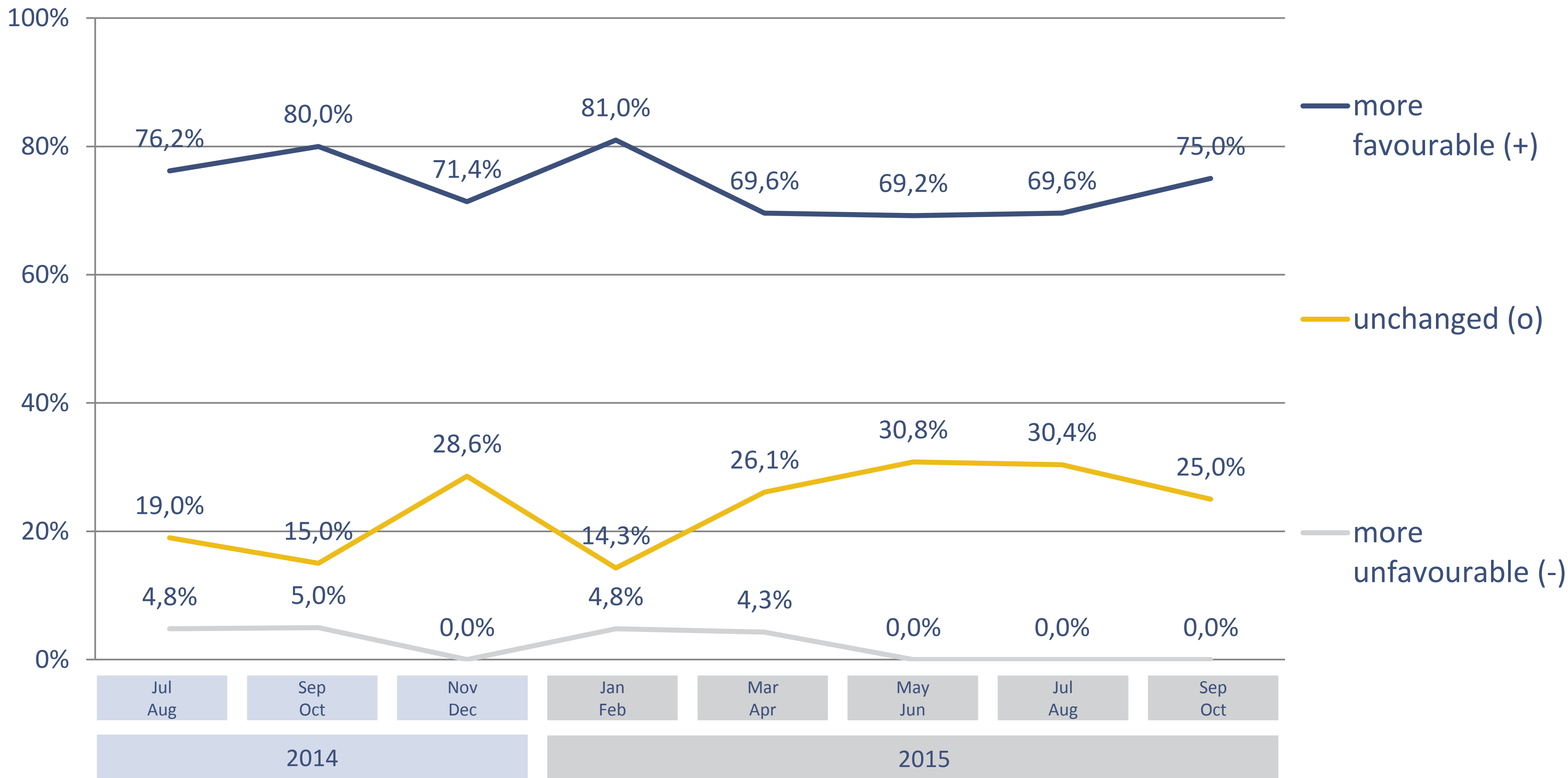


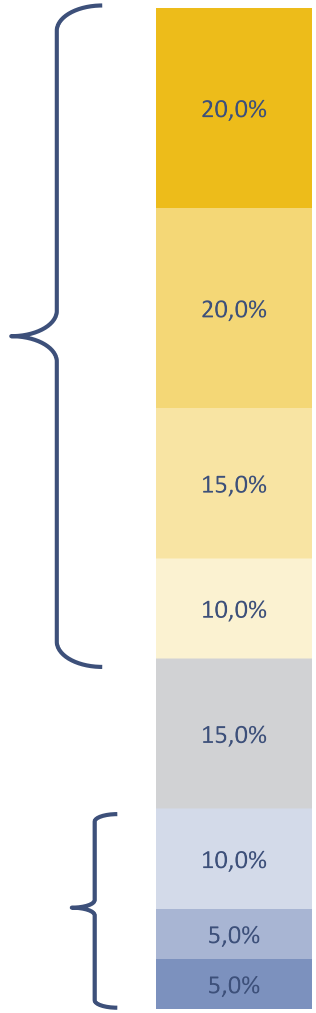
Fig. 3: DBCI ES/PT September | October 2015 “business expectations”, n=20

Further research| First semester 2015 with considerably higher revenues than 2014

"The revenues in the first half year 2015 have … in comparison to the revenues of the same period in the previous year."

65% of all polled companies could generate in parts a clear increase in revenues in the first half year term in 2015 compared to the same period in the previous year

Only 20% of all polled companies had to accept a decrease in revenues compared to the previous year



Legend

- grown very strong (more than +20%)
- grown strong (+10% to +19%)
- grown moderately (+5% to +9%
- grown slightly (+1% to +4%)
- unchanged (+/-0%)
- decreased slightly (-1% to -4%)
- decreased moderately (-5% to -9%)
- decreased strong (-10% to -19%)
- decreased very strong (more than -20%)

Fig. :4 DBCI ES/PT September | October 2015 "revenues H1 2014-2015", n=20

Further research | Clear increase in revenues expected for the full year 2015

"The revenues in 2015 will … compared to the revenues in 2014."

85% of all polled companies are expecting a healthy growth in revenues for the year 2014 compared with the previous year

Only 10% of all polled companies expect a decrease in revenues compared to the pervious year

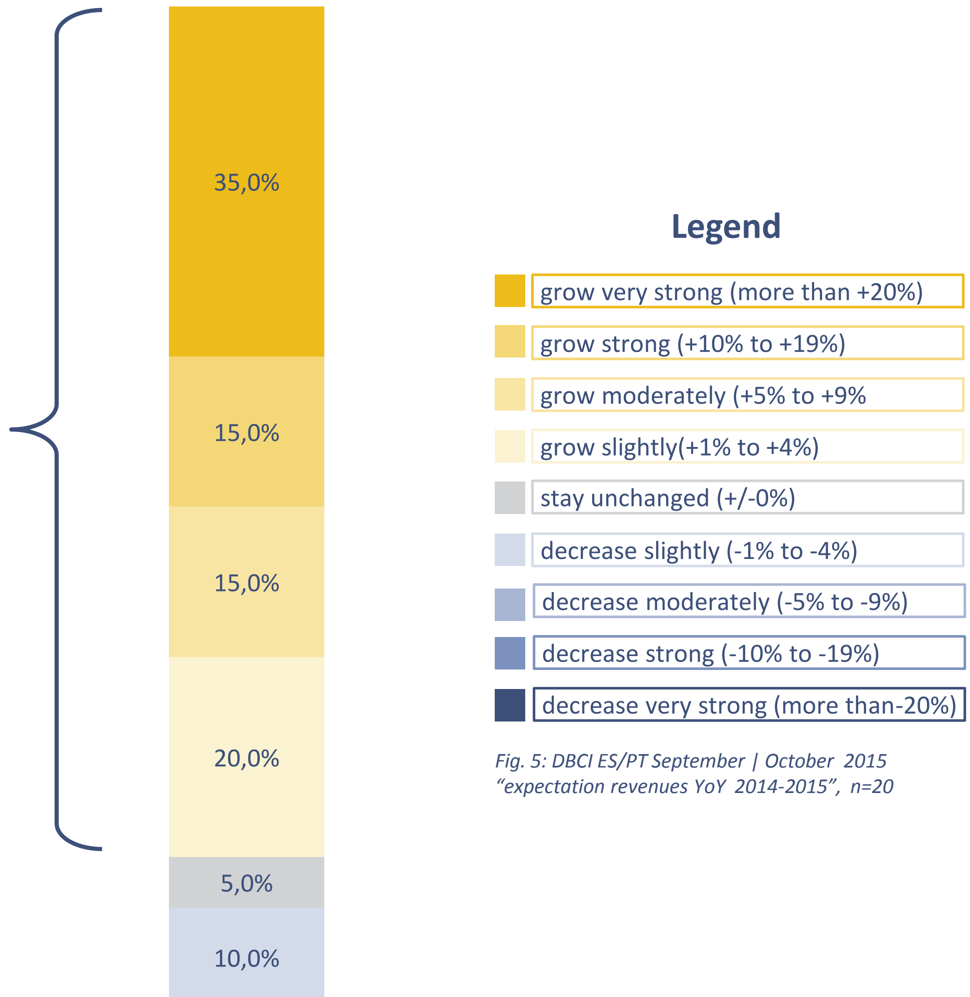
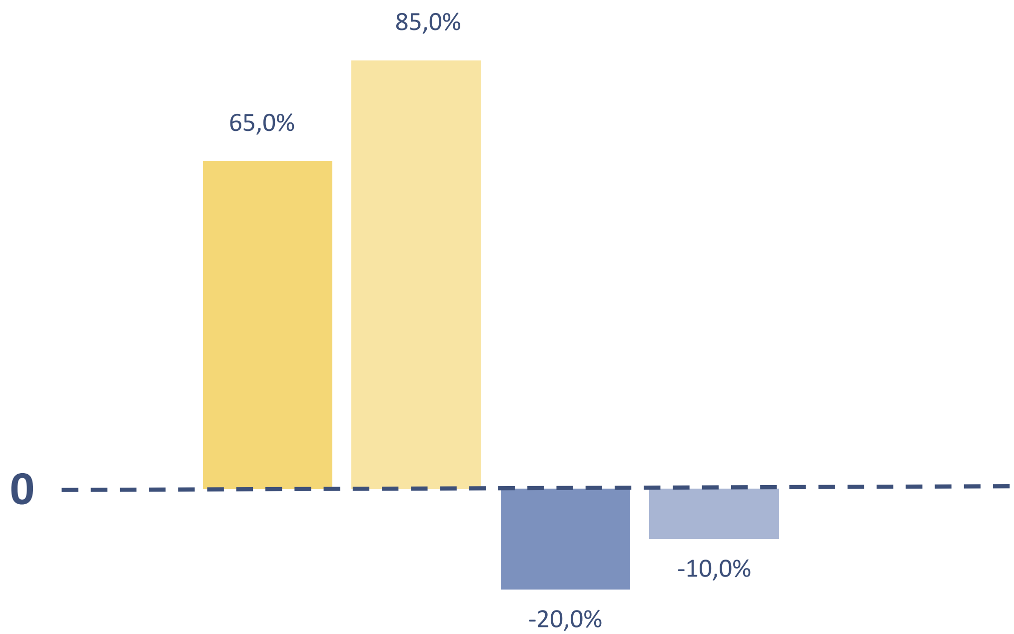


Fig. 5: DBCI ES/PT September | October 2015 "expectation revenues YoY 2014-2015", n=20

Further research | Losses from the first semester expected to be contained



Percentage of polled companies which have registered a growth respectively a decline in revenues in H1 2015, compared to the same period in the previous year

- YoY H1 2014-2015 growth
- YoY 2014-2015 growth expected
- YoY H1 2014-2015 decrease
- YoY 2014-2015 decrease expected

Fig. 6: DBCI ES/PT September | October 2015 "revenues YoY H1 2014-2015 and YoY 2014-2015", n=20

- 85% of the polled companies in Spain and Portugal expect to have a growth in revenues in 2015 compared to 2014
- Still 20% of all polled companies had to accept a decline in revenues in the first six months of 2015. However half of those companies are expecting to have balance the losses at the end of the year
- Traditionally the IT business has a relative calm period in the summer, followed by a strong showing towards the end of the year

DBCI | Roadmap 2015 & Contact

2015
January
February
March
April
May
June
July
August
September
October
November
December

Nov./Dec. | 2015/11/30

- The next survey will take place in calendar week 45-46 of 2015
- The next planned publication date will be the 11th of November 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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