

Spain

Portugal

January | February 2016

DBCI

The pulse of the Digital Signage
and DooH industry

OVAB Digital Signage & DooH
Business Climate Index

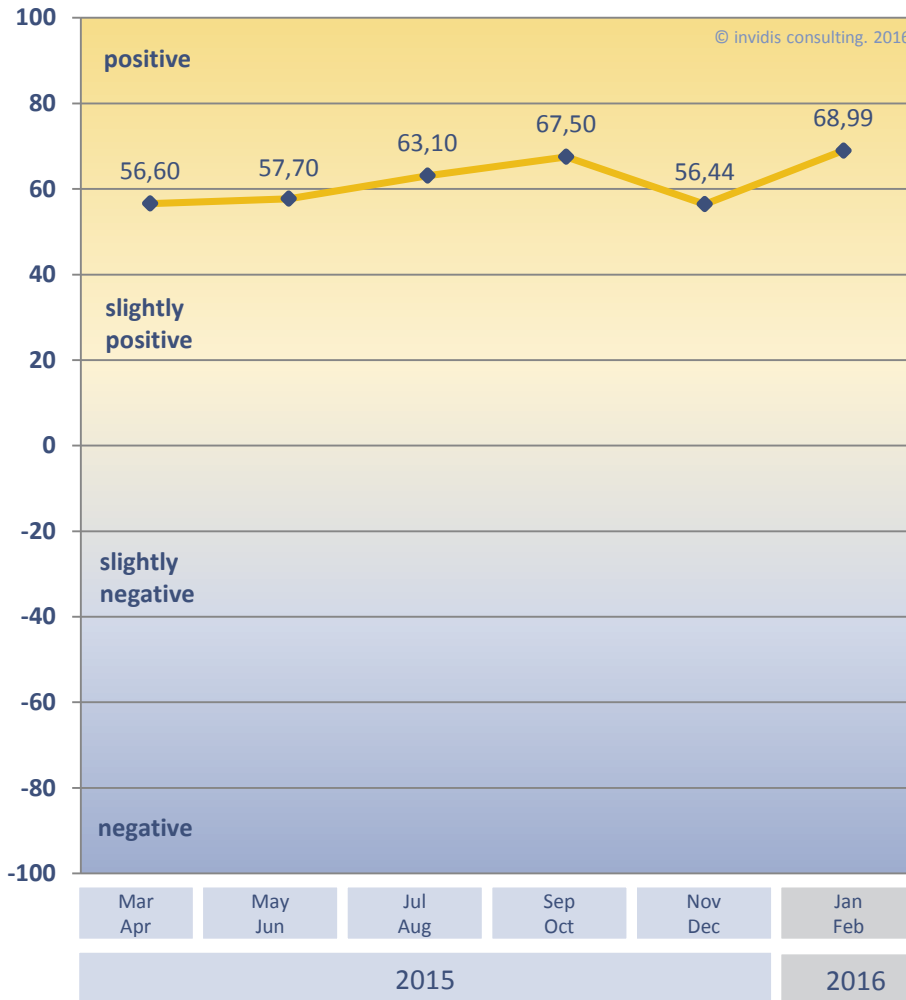
**DIGITAL SIGNAGE
SUMMIT @ISE**


invidis
CONSULTING

invidis research
2016 ES 100



Digital Signage market back on positive trend at the start of the year



- The digital Signage Business Climate Index Spain and Portugal has increased by 12,55 base points from 56,44 base points to 68,99 base points. The decline of the index in November 2015 has been turned around. The increase in comparison to the previous survey is 22%. What is even more encouraging for the Digital Signage industry on the Iberian peninsular is the increase in business sentiment of almost 50% since January 2015.
- The current business situation is rated by the same number of companies as good and as satisfactory. That leaves only less than 5% of the market participants unhappy with the current situation.
- At the same time the optimism towards the near future has been consistently growing since the summer. Now over 90% of all polled companies expect a *more favourable* situation for their products and services in the Digital Signage and Digital out of Home market within the next six months.

change
DBCI 2016 #1

year-on-year

+44,8%

previous survey

+22,2%

Fig. 1: DBCI ES/PT January | February 2016 "business situation", n=29

Participants: n=29; Region: España & Portugal; Time frame: 2016 weeks 2-3



Good current business situation & very high expectations

Current business Situation | ES | January/February 2016

Expectations | ES | January/February 2016

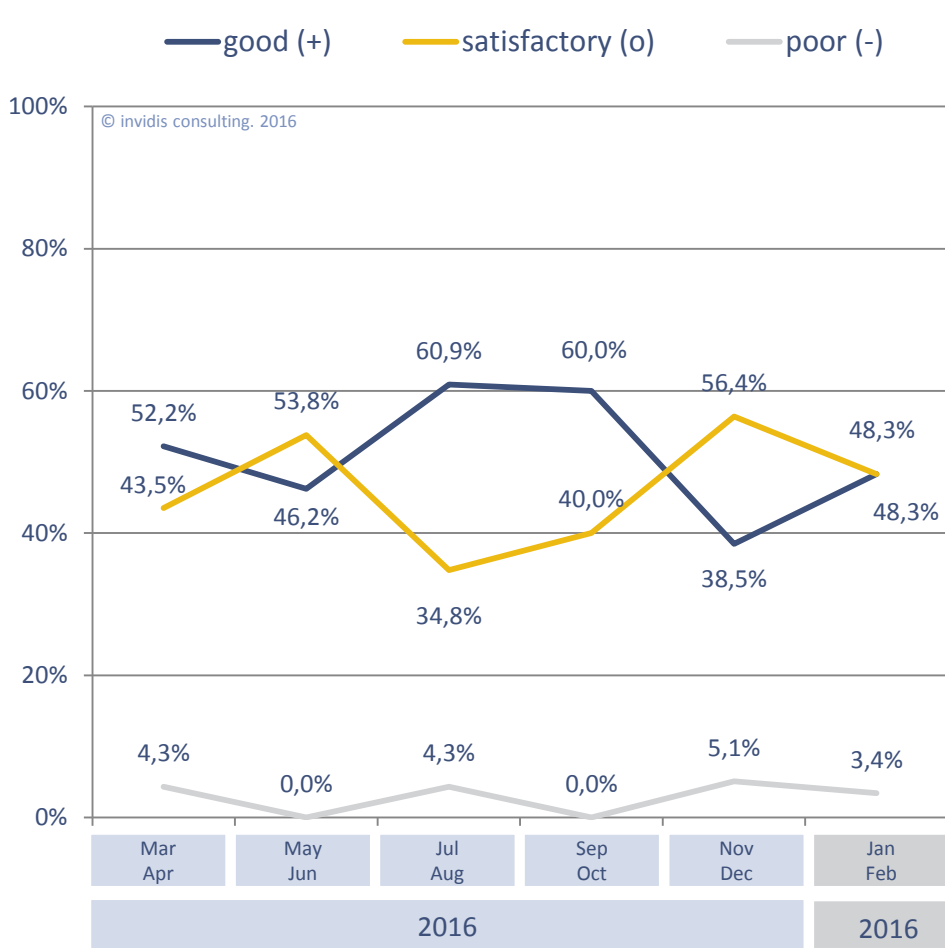


Fig. 2: DBCI ES/PT January | February 2016 „Business Situation ES“ rolling 12 months, n=29

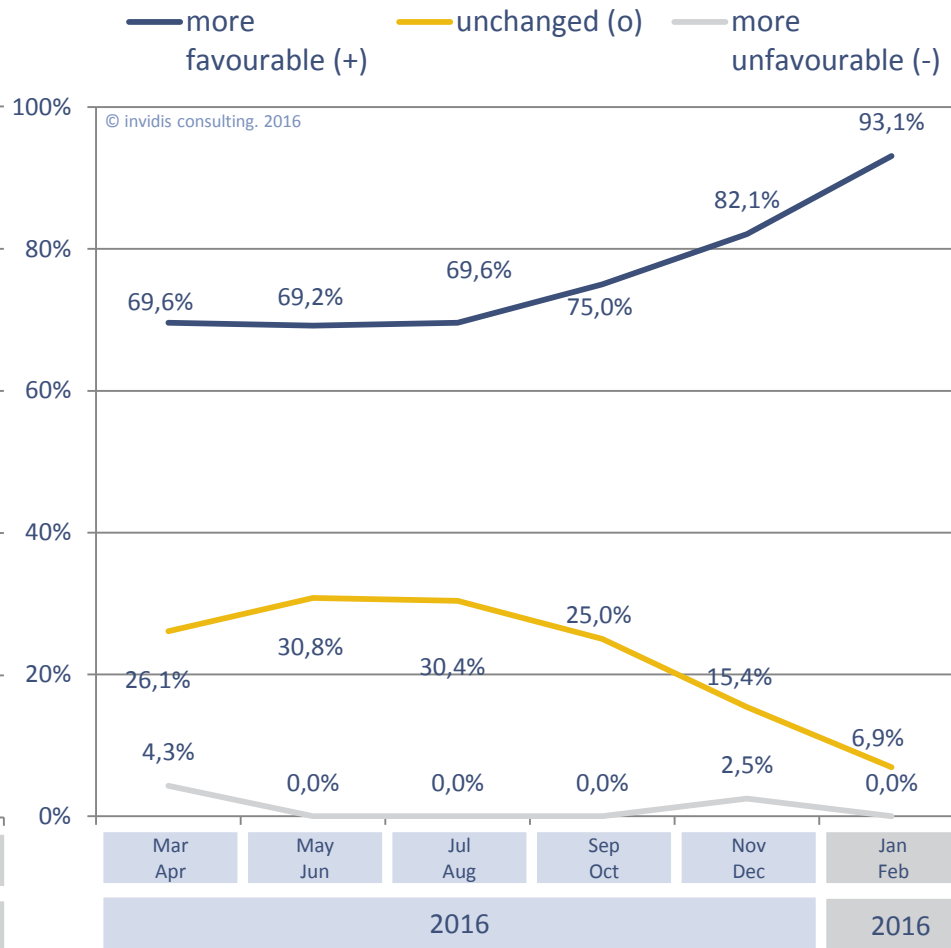


Fig. 3: DBCI ES/PT January | February 2016 „Expectations ES“ rolling 12 months, n=29



Hirings 2015 | Digital Signage creates of new jobs

- **61,9%** of all companies in the Digital Signage Market have hired new staff in the last year.
- In 2015 **up to 100 new jobs** were created in the Digital Signage market in Spain and Portugal.
- Now this unbroken positive trend in the IT industry overall has developed in a definite shortage of qualified personal. Companies are more and more concerned, how they can match recruiting with their growth strategy.
- As a whole there is a high demand for qualified personnel. Due to the digital transformation and the increasing integration of digital technologies 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 2015

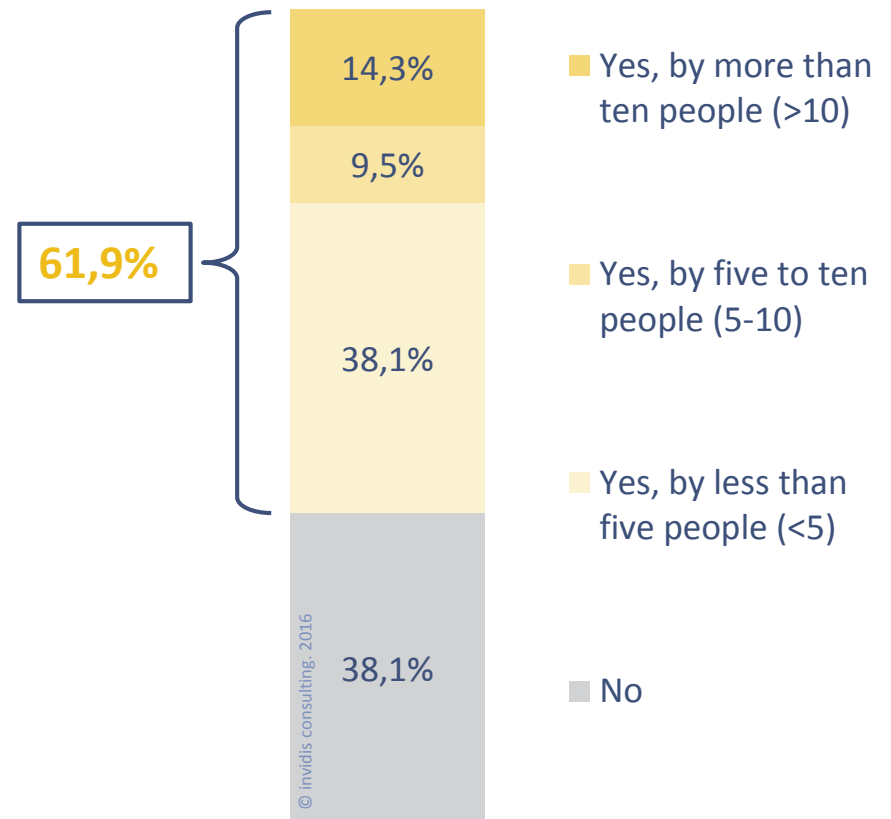


Fig. 4: DBCI ES/PT January/February 2016 "Hirings 2015", n=21



DBCI | Roadmap 2016 & Contact

2016	
January	
February	
March	← DBCI Mar./Apr. WN12
April	
May	← DBCI May./Jun. WN21
June	
July	← DBCI Jul./Aug. WN30
August	
September	← DBCI Sep./Oct. WN39
October	
November	← DBCI Nov./Dec. WN48
December	

- The next survey will take place in calendar weeks 10-11
The next planned publication date will be in week 12
- 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 2016. For further information please contact Daniel Russell.

Contact

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DSS | The Digital Signage Summit series

**DIGITAL SIGNAGE
SUMMIT @ISE**

- «Digital Signage Summit» new brand for event series

- ❖ DSS Europe: 23-24 June 2016
- ❖ DSS MENA: 19-20 Sep 2016
- ❖ DSS Russia: 1-2 Nov 2016

**DIGITAL SIGNAGE
SUMMIT EUROPE**

- DSS is a dedicated confex event platform - conference and exhibition - featuring digital signage and DooH topics

**DIGITAL SIGNAGE
SUMMIT RUSSIA**

- Each event features visionary and best practise presentations as well as panel discussions concerning the most recent state of the art projects, trends and drivers of the industry

**DIGITAL SIGNAGE
SUMMIT MENA**

- All events also have a dedicated exhibition space for product presentation and networking opportunities



DSS | Digital Signage Summit Kick-off Sessions @ ISE 2016

DSS Kick-off Sessions @ ISE 2016

Integrated Systems Europe
9-12 February 2016
Amsterdam, RAI, NL



- Together with the ISE and in cooperation with Digital Signage Summit Europe, invidis consulting will be present at [Integrated Systems Europe](http://integratedsystems.eu) 2016 (9 – 12 February 2016, Amsterdam) with several digital signage events.
- **ISE 2016 Presentations invidis consulting**
Every Day at 12:00, Commercial Theatre Hall 8
- **Digital Signage Summit Market Briefings**
Every Day at 14:00, Room F102
- **Digital Signage Summit Guided Tours**
Every Day at 14:30, Room F102
- **More here:**
invidis.de/ise-2016-digital-signage-ise-program/