

Spain
Portugal
May | June 2016

DBCI

The pulse of the Digital Signage
and DooH industry



Digital Signage & DooH
Business Climate Index



**DIGITAL SIGNAGE
SUMMIT EUROPE**

23-24 June 2016, Munich, Germany



invidis research
2016 ES 300



Digital Signage business sentiment sees slight correction in May

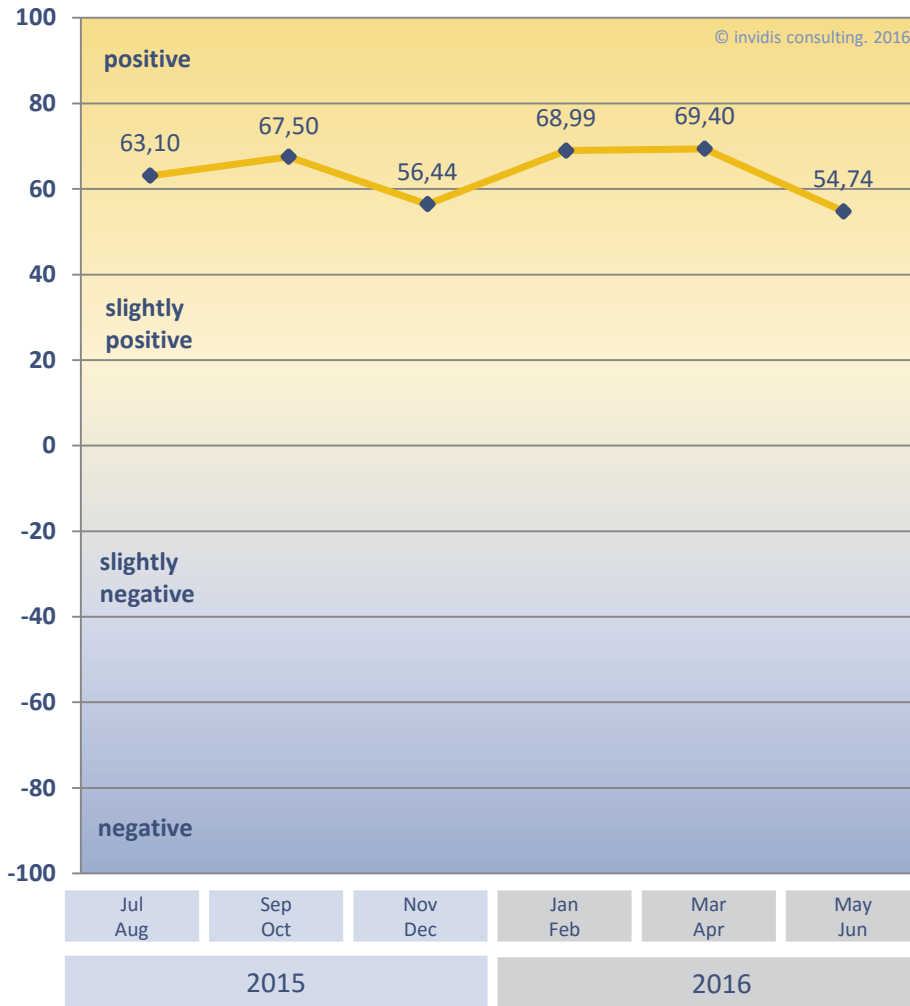


Fig. 1: DBCI ES/PT May | June 2016 "business situation", n=21

Participants: n=21; Region: España & Portugal; Time frame: 2016 weeks 18-19

- The digital Signage Business Climate Index Spain and Portugal has declined by 14,66 base points from 69,40 base points to 54,74 base points.
- The current business situation saw growth from the negative answers of the market participants. Still more than half of the polled companies register a good situation for their products and services in May.
- The optimism towards the near future is rated much more conservative. Almost 30% of the industry sees no further increase of the business sentiment in the near future.
- In general the IT and Digital Signage market is not much different than in the months before. Only the upcoming Spanish election might have installed some uncertainty in the industry concerning the political influence on the economic outlook. Also many roll-outs have currently stalled in pace.
- Most Digital Signage solutions have been reliant on Windows as OS in 2015. However Linux based solutions are increasingly implemented

change
DBCI 2016 #3

year-on-year

-5,1%

previous survey

-21,1%



Much more conservative current business situation & expectations

Current business Situation | ES | May/June 2016

Expectations | ES | May/June 2016

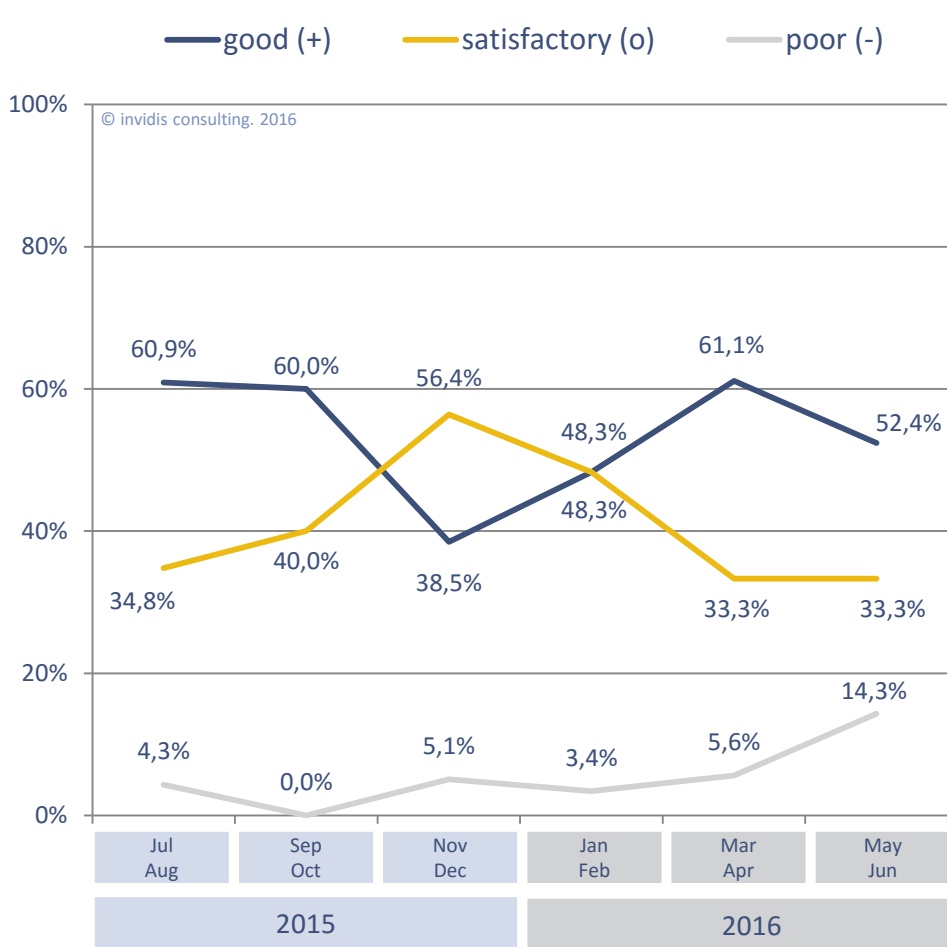


Fig. 2: DBCI ES/PT May | June 2016 „Business Situation ES“ rolling 12 months, n=21

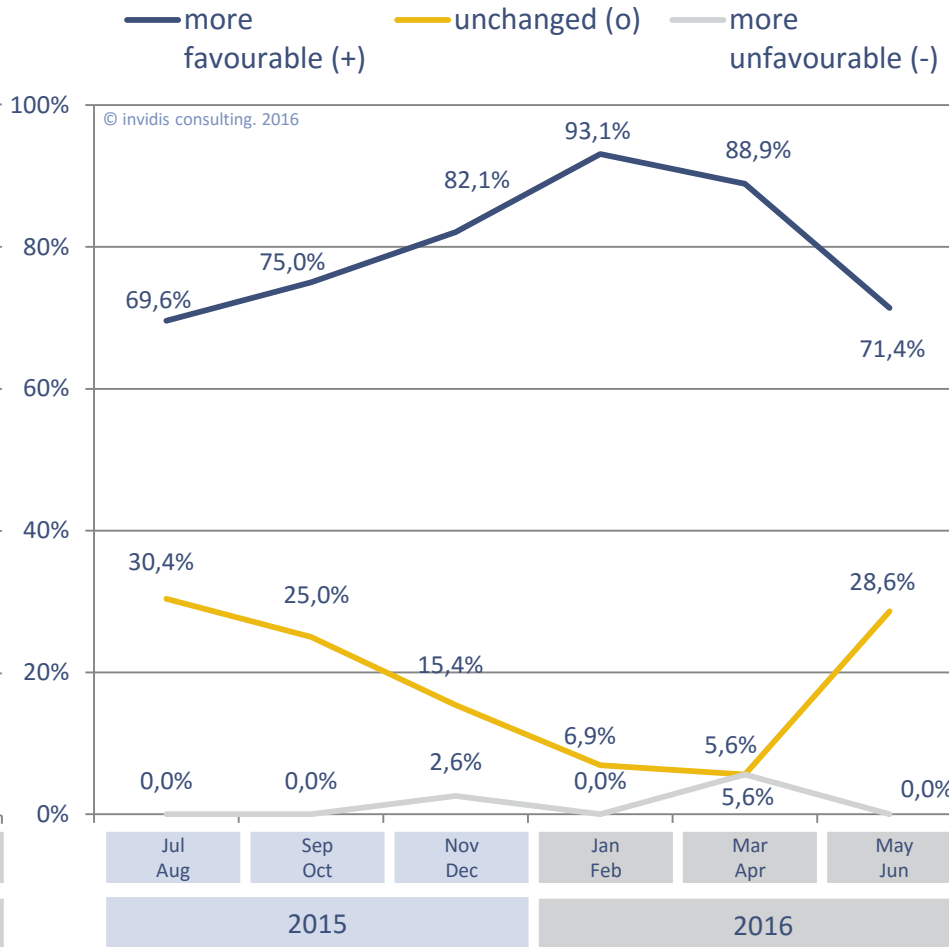


Fig. 3: DBCI ES/PT May | June 2016 „Expectations ES“ rolling 12 months, n=21



Windows in first, Linux challenges & Android picks up speed

Question: How high was the percentage of operating systems used in Digital Signage Projects in 2015?

Windows is implemented most frequently with Digital Signage projects. However other operating systems have significantly gained ground in the last two years.

Particularly Linux based installations are becoming more and more popular. Here cost and security issues are dictating the decisions. With Digital Signage installations becoming more varied in size and required performance, the appliances running on a non-PC architecture like Raspberry Pi, Cisco, BrightSign, Spinetix etc. are more widely integrated.

Cost effective systems operating on Android or SoC basis currently have the highest dynamic in the market. Still many security and performance issues remain.

Apple operating systems could establish a robust nice segment. However, many managers with IT responsibility dismiss it as an operating system for Digital Signage installations.

Market share of IT operating systems in Digital Signage installations 2015

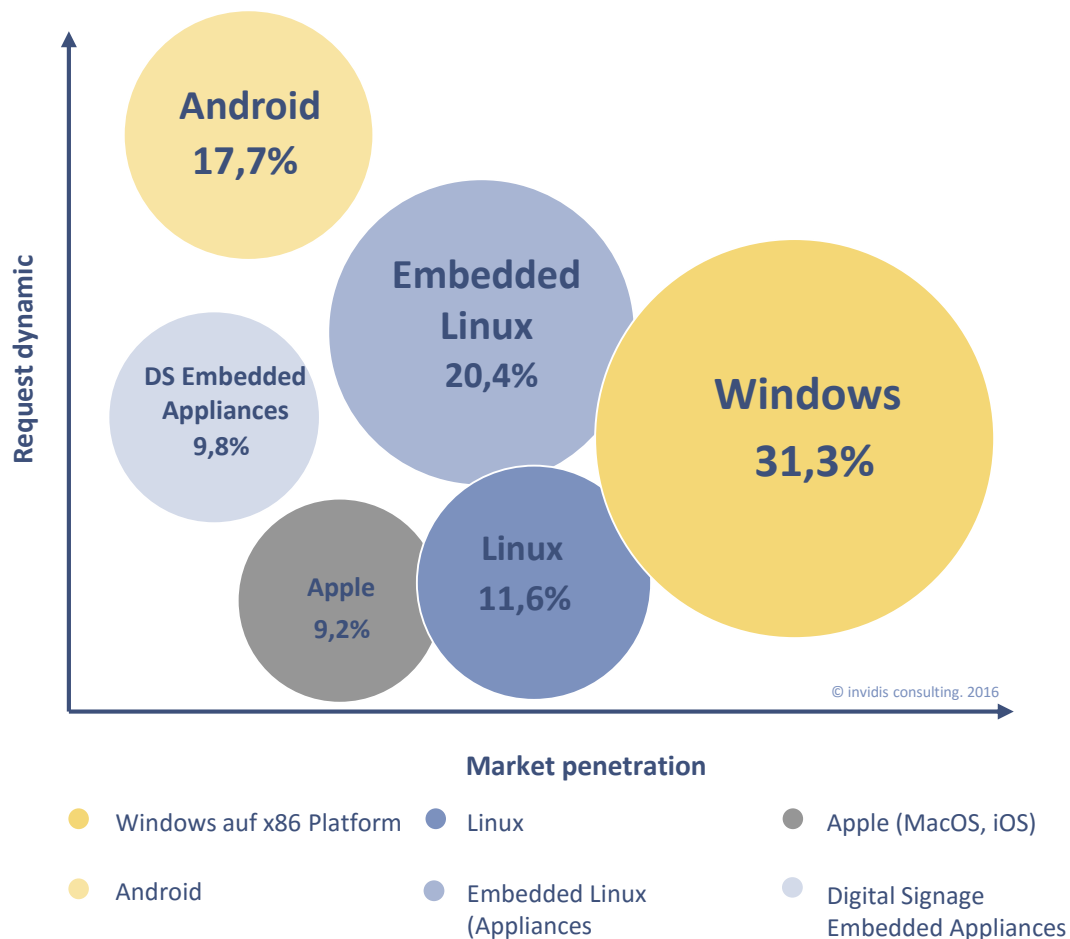


Fig. 5: DBCI ES/PT May | June 2016 "operating systems 2015", n=10



DBCI | Roadmap 2016 & Contact

2016
January
February
March
April
May
June
July
August
September
October
November
December

← **DBCI Jul./Aug. | WN30**

← **DBCI Sep./Oct. | WN39**

← **DBCI Nov./Dec. | WN48**

OVAB Europe was rebranded as **Digital Signage Federation Europe** starting with the 1st April 2016

- The next survey will take place in calendar weeks 28-29 of 2016. The next planned publication date will be the calendar week 30 of 2016.
- The DBCI is polled by invidis consulting and published in cooperation with DSF 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.

invidis consulting

invidis is a renowned boutique consulting and research house based in Munich. Delivering actionable information and advise to customers across EMEA.

Contact

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  DSS | The Digital Signage Summit series

- «Digital Signage Summit» new brand for event series
- DSS is a dedicated confex event platform - conference and exhibition - featuring digital signage and DooH topics
- 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
- All events also have a dedicated exhibition space for product presentation and networking opportunities

