

Spain

Portugal

September | October 2016

DBCI

The pulse of the Digital Signage
and DooH industry



Digital Signage & DooH
Business Climate Index



**DIGITAL
SIGNAGE
SUMMIT**

invidis research
2016 ES 500



invidis
CONSULTING



Robust positive Digital Signage market business sentiment



- The Digital Signage Business Climate Index in Spain and Portugal remains on a positive level in autumn 2016. The index has seen a nominal decrease of 2,91 base points from 55,49 points to 52,58 base points. In total the Index is down by -22,1% year-on-year and -5,2% compared to the previous survey.
- The current business situation shows a consistently satisfied sentiment - with negative ratings practically non-existent
- The outlook towards the near future registered some increase in the conservative expectation for the business situation. Also currently almost 80% of the surveyed companies are expecting a *more favourable* business situation for their products and services within the next six months.

Further Research

- The market participants have again underlined the high importance of the SMB market for Digital Signage, with three quarters of all revenues being generated in this sector
- The DooH industry sees a medium growth potential in programmatic buying for DooH until 2020.

change DBCI 2016 #5

	year-on-year	previous survey
	-22,1%	-5,2%

Fig. 1: DBCI ES/PT September | October 2016 "business situation", n=19

Participants: n=19; Region: España & Portugal; Time frame: 2016 weeks 38-39



More conservative current business situation & very good expectations

Current business Situation | ES/PT | September/October 2016

Outlook | ES/PT | September/October 2016

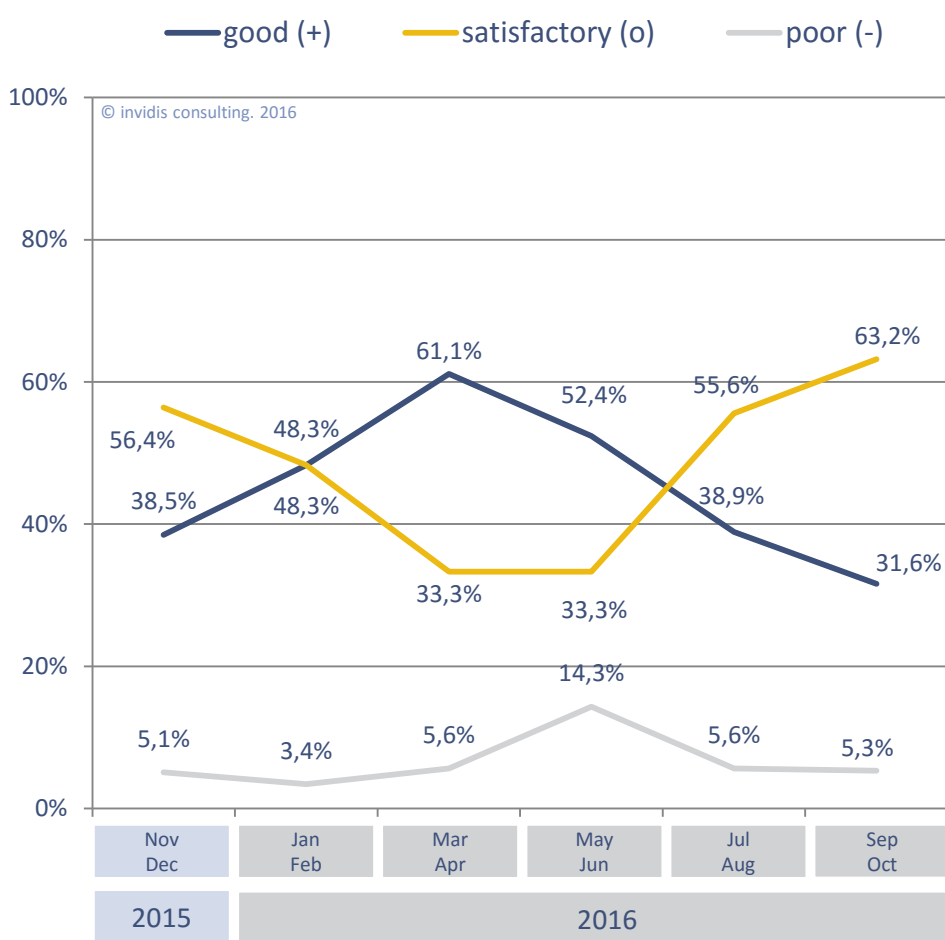


Fig. 2: DBCI ES/PT September | October 2016 „Business Situation ES“ rolling 12 months, n=19

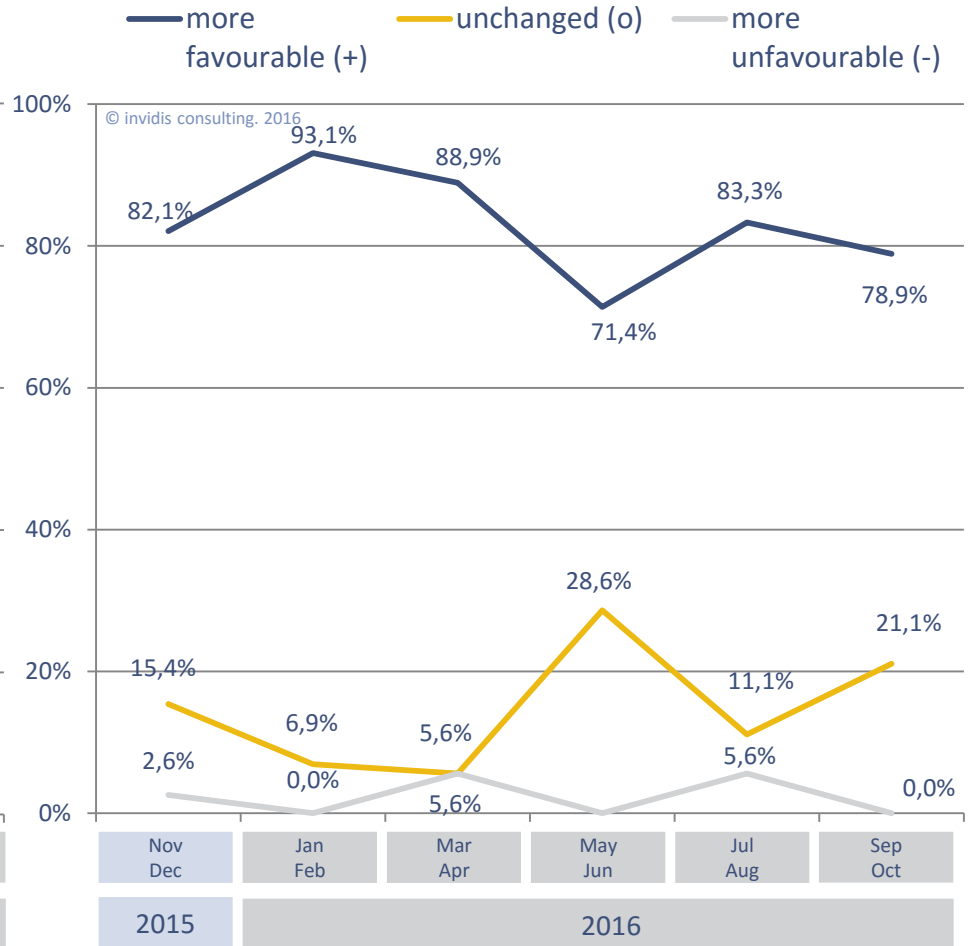


Fig. 3: DBCI ES/PT September | October 2016 „Expectations ES“ rolling 12 months, n=19



Further research | The SMB sector drives Digital Signage revenues

Question: How many projects did your company roll out in the following categories in 2015?

- Over three quarters of all Digital Signage projects in 2015 were small and medium installations with up to 50 displays
- Smaller projects have a higher margin and can be carried out successfully by most players in the market
- Falling hardware prices created a high demand for easy-to-use Digital Signage solutions in the SMB sector
- Only under 10% of all Digital Signage networks are larger than 100 displays
- Large projects generate high revenues, but discounts increase with the number of hardware used and tear into the margin. Moreover, only few market participants can sustainably carry out projects with over 100 displays.

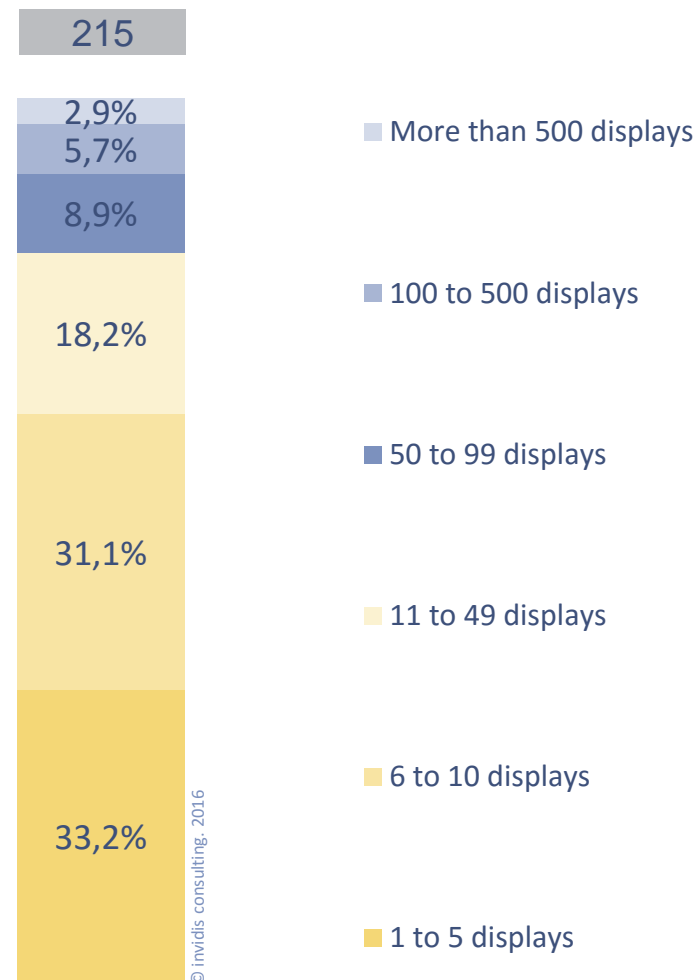


Fig. 4: DBCI ES/PT September | October 2016 „project sizes 2015“, n=14



Further research | Medium growth for programmatic buying in DooH expected

Forecast market share programmatic buying DooH in 2017

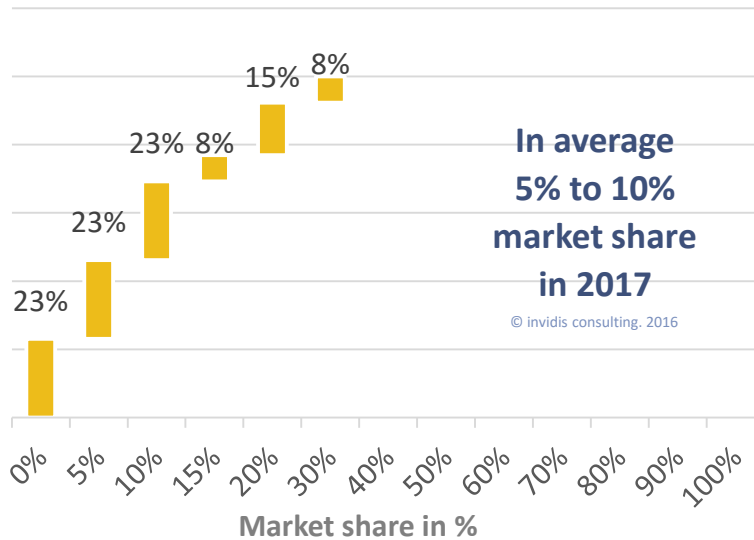


Fig. 5: DBCI ES/PT September | October 2016 "market share programmatic 2017", n=12

Forecast market share programmatic buying DooH in 2020

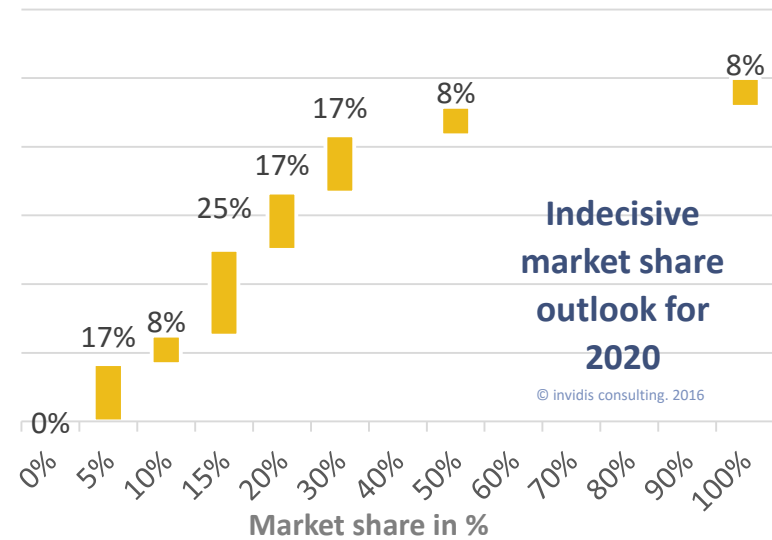


Fig. 6: DBCI ES/PT September | October 2016 "market share programmatic 2020", n=13

Question: How high do you expect will be the percentage of revenues generated from programmatic buying compared to your total revenues?

- The market players see a medium growth potential in programmatic buying for DooH. They expect that the market share will reach approximately 5% to 10% in 2017. The picture for 2020 is more indecisive as the survey participants are undecided in their assessment.
- Overall the polled companies remain optimistic of the potential for programmatic buying in DooH. Yet while the business concept has some definite potential, there are still many technical issues to be solved.



DBCI | Roadmap 2016 & Contact

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

← **DBCI Nov./Dec. | WN49**

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

- The next survey will take place in calendar weeks 47-48 of 2016. The next planned publication date will be the calendar week 41 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