

Spain
Portugal
November | December
2015

DBCI



Digital Signage & DooH
Business Climate Index

The pulse of the Digital Signage
and DooH industry

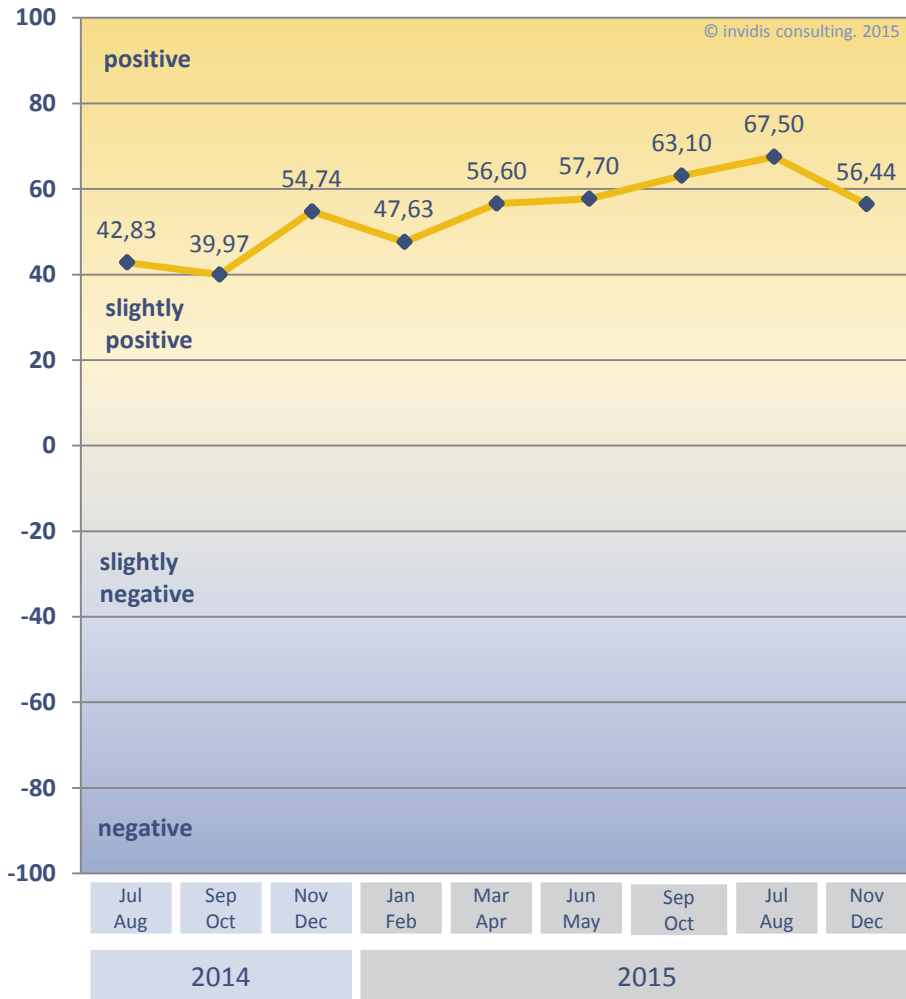


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Digital Signage market sees slight correction towards the end of the year



- The digital Signage Business Climate Index Spain and Portugal has decreased by 11,06 base points from 67,50 base points to 56,44 base points.
- The decline of the index has been definite. However, it still is well in the *positive* region of the scale. As almost 60% of the market participants are still satisfied with their current business situation
- At the same time the optimism towards the near future has been consistently growing since the summer. Now well over 80% 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.

Further Research

- The market leaders among the distributors in Spain and Portugal are TD Maverick and Ingram Micro followed by Charmex and Crambo. Between 45% and 55% of the market participants have worked with those competitors.
- 60% of the DooH market has seen a rise in bookings in the current year. The overall market is expected to register a healthy increase in the number of advertising booked in 2015

Fig. 1: DBCI ES/PT November | December 2015 "business situation", n=39

Participants: n=39; Region: España & Portugal; Time frame: 2015 calendar weeks 46-47



Market participants with robust current business sentiment

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

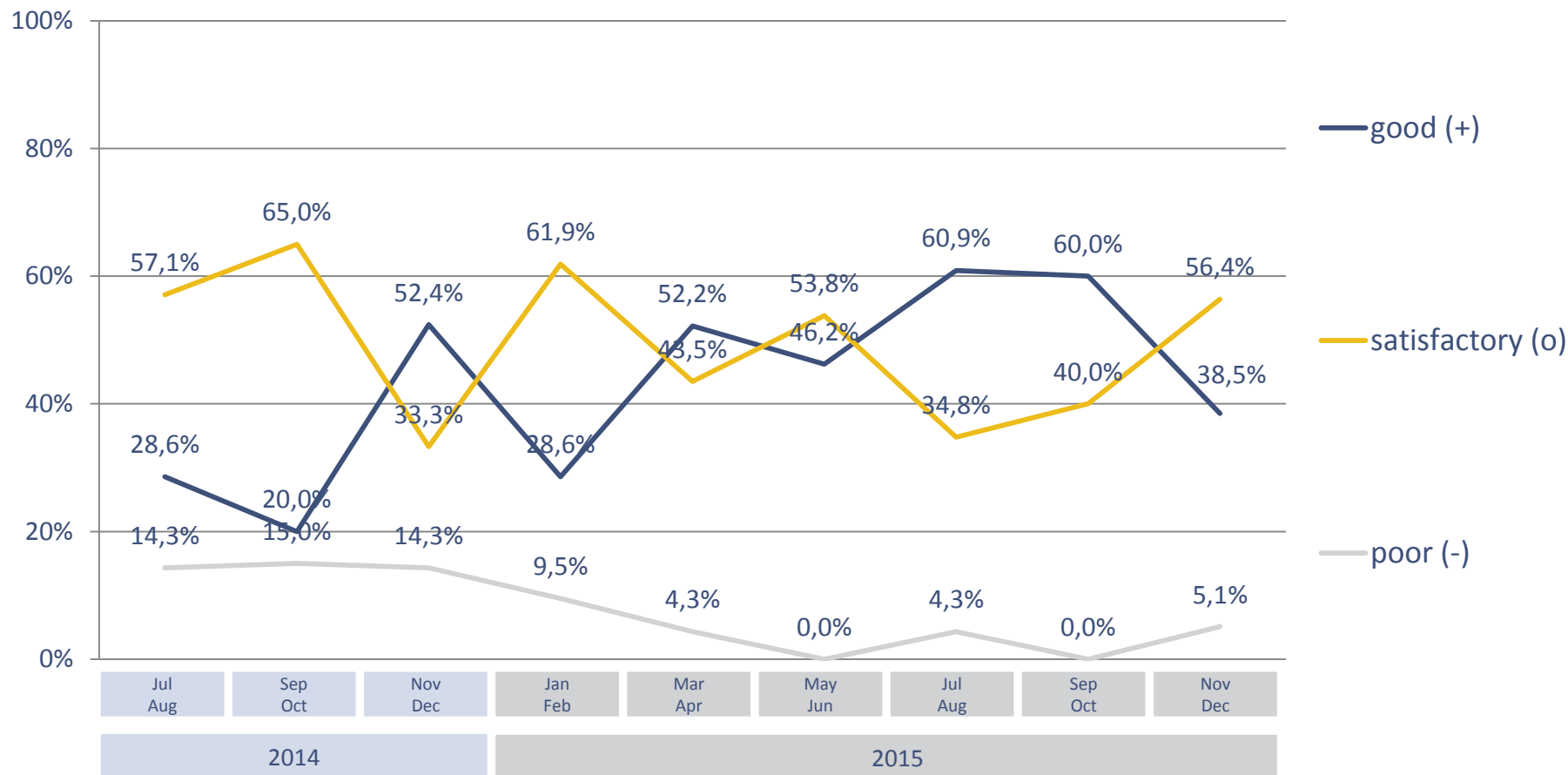


Fig. 2: DBCI ES/PT November | December 2015 "business situation", n=39



Digital Signage industry with very positive six month outlook

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

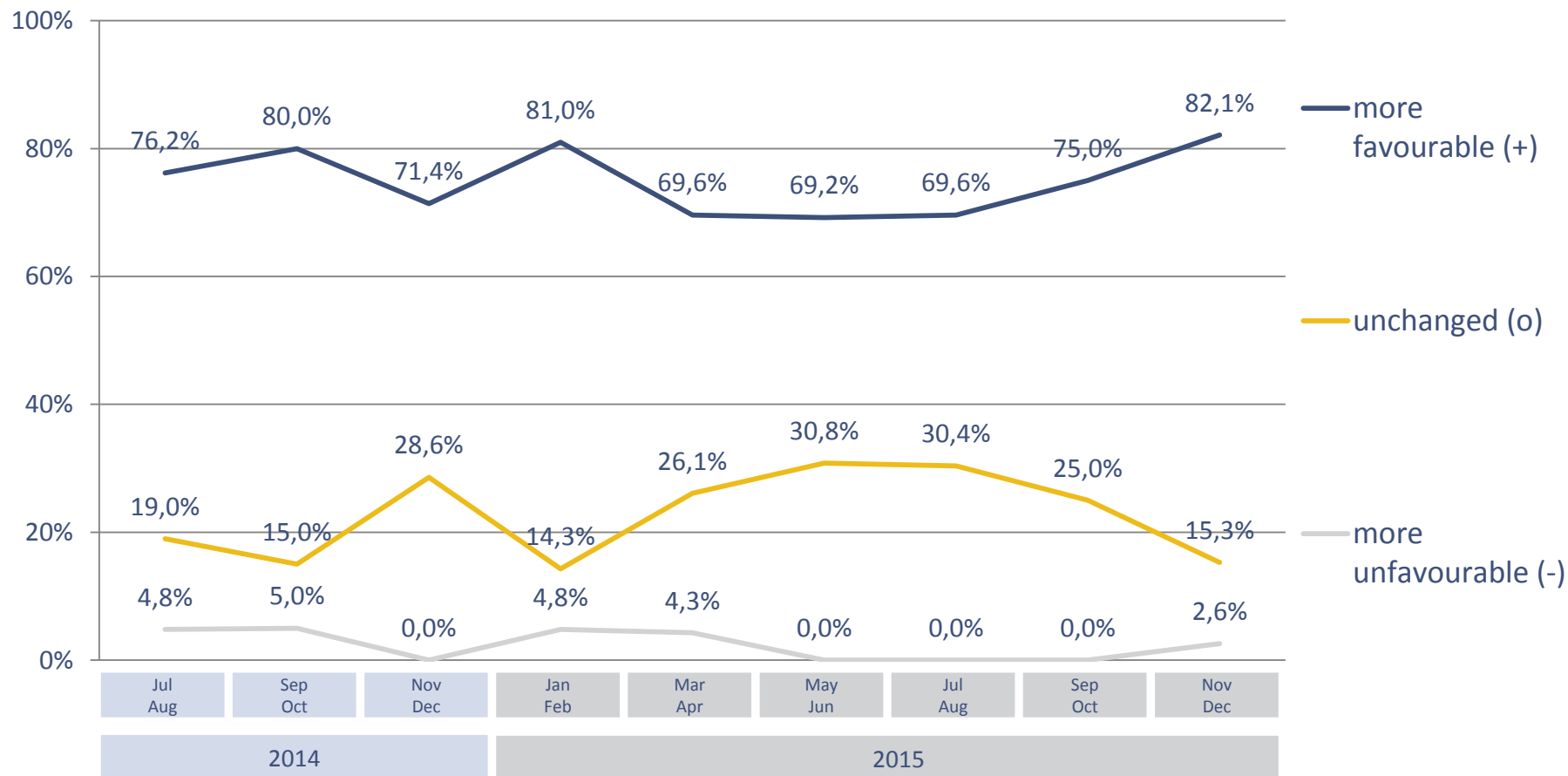


Fig. 3: DBCI ES/PT November | December 2015 "business expectations", n=39



Further research | The market is dominated by the Top 4 distributors

Question: „With which distributors do you work together?“

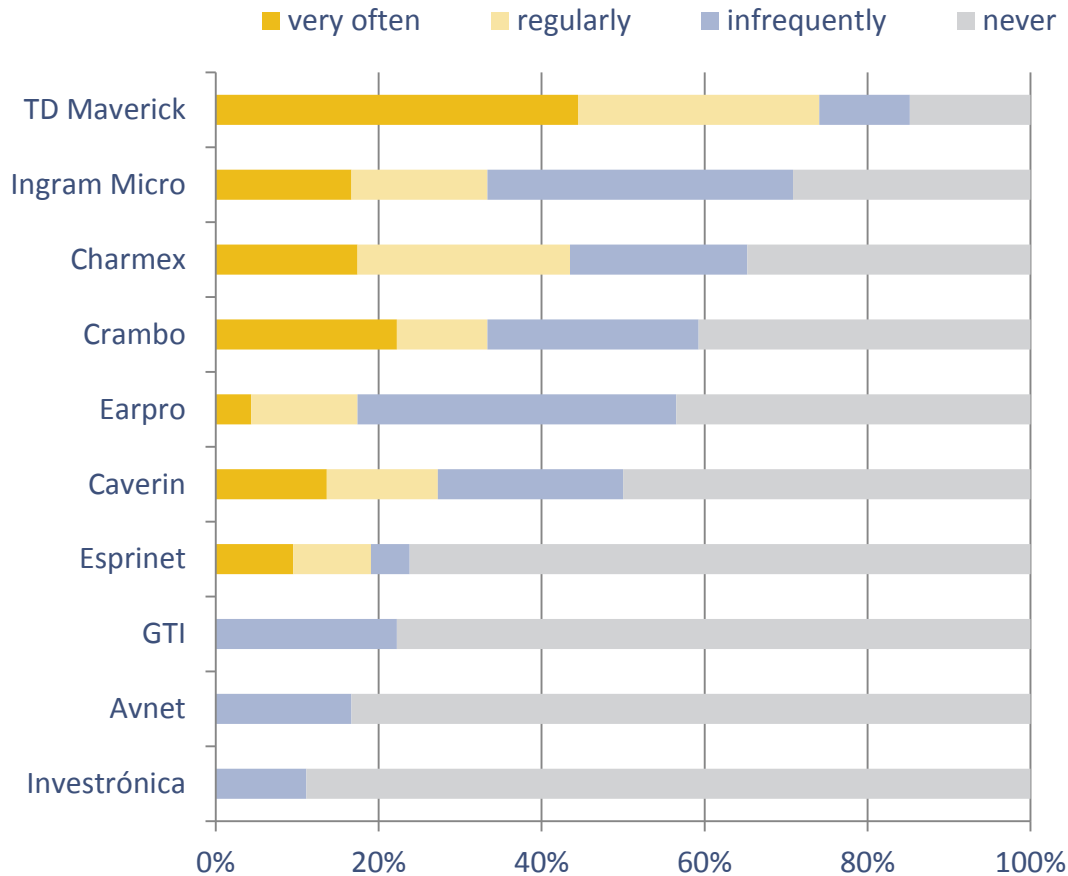


Fig. 4: DBCI ES/PT November/December 2015 "Ranking distributors", n=21 (mean value)

- The two market leaders among the distributors on the Iberian peninsular are TD Maverick and Ingram Micro. Between 60% and 85% of all polled companies work with these distributors.
- In short succession follow national champions Charmex and Crambo. Between 35% and 40% of the market participants have worked with those competitors
- In many countries a local champion plays an important role in the market for distributors. In Spain they are Charmex and Crambo, France it is SIDEV and in Switzerland MobilePro..
- Most IT distributors offer Digital Signage related services. The market participants have noted that DS projects offer a good possibility to generate additional revenues to the standard box-moving business.



Further research | DooH is growing fast and increasing in relevance

Question: Please rate the degree of capacity utilization of your DooH network(s) with advertising bookings in 2015 compared to 2014 (including the expected bookings until the end of the current year)?

- Over 60% of polled companies currently doing business in the Digital out of Home market have seen a rise in advertising bookings in the current year. The overall market is expected to register a healthy increase in the total number of bookings for 2015.
- Less than 35% of the market has registered no change in the number of advertising bookings in the year-on-year trend in 2015 compared to 2014. Not even 5% expect a decline.
- In general DooH is starting to play a more and more important part in the media landscape. DooH is accounting for the most dynamic segment in the traditional ooH advertising branch. Primarily through the digitalisation of media assets has the industry been able to compete with the development in the new media landscape.

YoY bookings of DooH Networks 2014/15

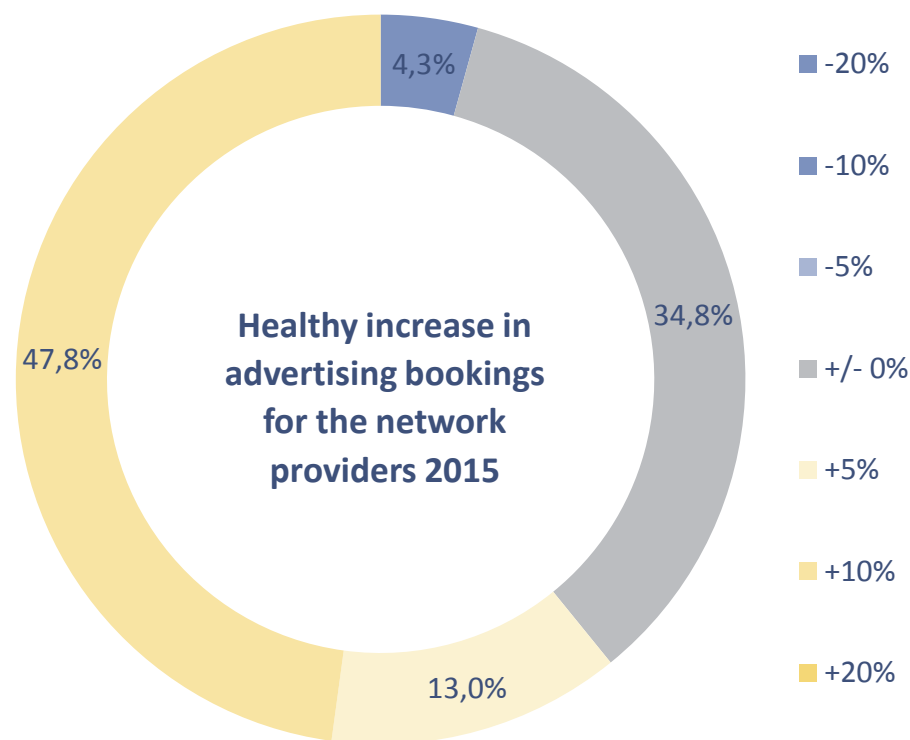


Fig. 5: DBCI ES/PT November | December 2015 "capacity utilization 2014/15", n=23



DBCI | Roadmap 2015 & Contact

2016	
January	Jan./Feb. 2016/02/01
February	
March	Mar./Apr. 2016/03/21
April	
May	May./Jun. 2016/05/23
June	
July	Jul./Aug. 2016/07/18
August	
September	Sep./Oct. 2016/09/19
October	
November	Nov./Dec. 2016/11/21
December	

- The next survey will take place in calendar weeks 2-3 of 2016
- The next planned publication date will be the 1st of February 2016
- 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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