

Spain
Portugal
March | April 2016

DBCI

The pulse of the Digital Signage
and DooH industry



Digital Signage & DooH
Business Climate Index



**DIGITAL SIGNAGE
SUMMIT EUROPE**

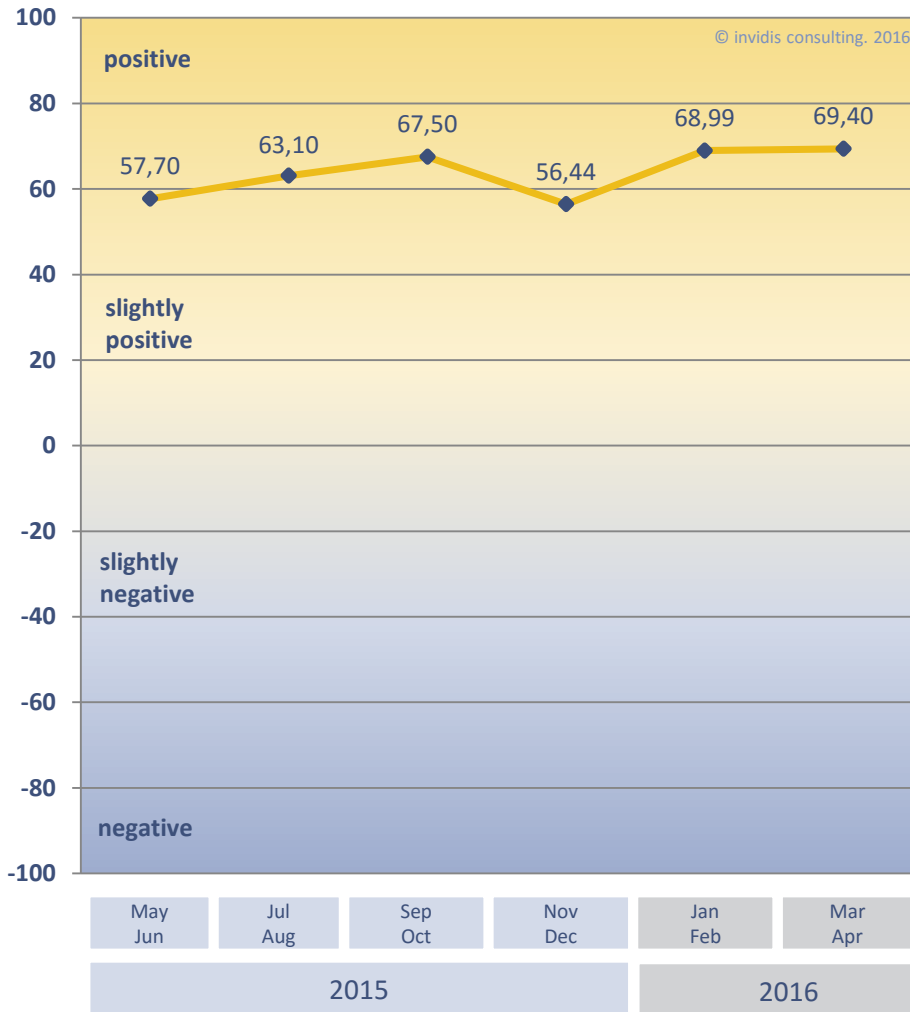
23-24 June 2016, Munich, Germany



invidis research
2016 ES 200



Good Digital Signage business sentiment in the first quarter 2016



- The digital Signage Business Climate Index Spain and Portugal has remained almost flat with a minor nominal increase by 0,41 base points from 68,99 base points to 69,40 base points.
- The current business situation saw continuous positive growth. More than 60% of the polled companies register a good situation for their products and services in March and April.
- The optimism towards the near future is rated slightly more conservative by the market participants. Still the outlook is mostly more favourable by almost 90% of the polled companies.
- Encouragingly the Index is also up by over 20% compared to the same period in the previous year. Overall the Digital Signage industry has started well into the new year. The first quarter of 2016 saw an increase in customer demand and much more tenders on the market.

change
DBCI 2016 #2

year-on-year

+22,6%

previous survey

+0,6%

Fig. 1: DBCI ES/PT March | April 2016 "business situation", n=18

Participants: n=18; Region: España & Portugal; Time frame: 2016 weeks 10-11



Further increased current business situation & very high expectations

Current business Situation | ES | March/April 2016

Expectations | ES | March/April 2016

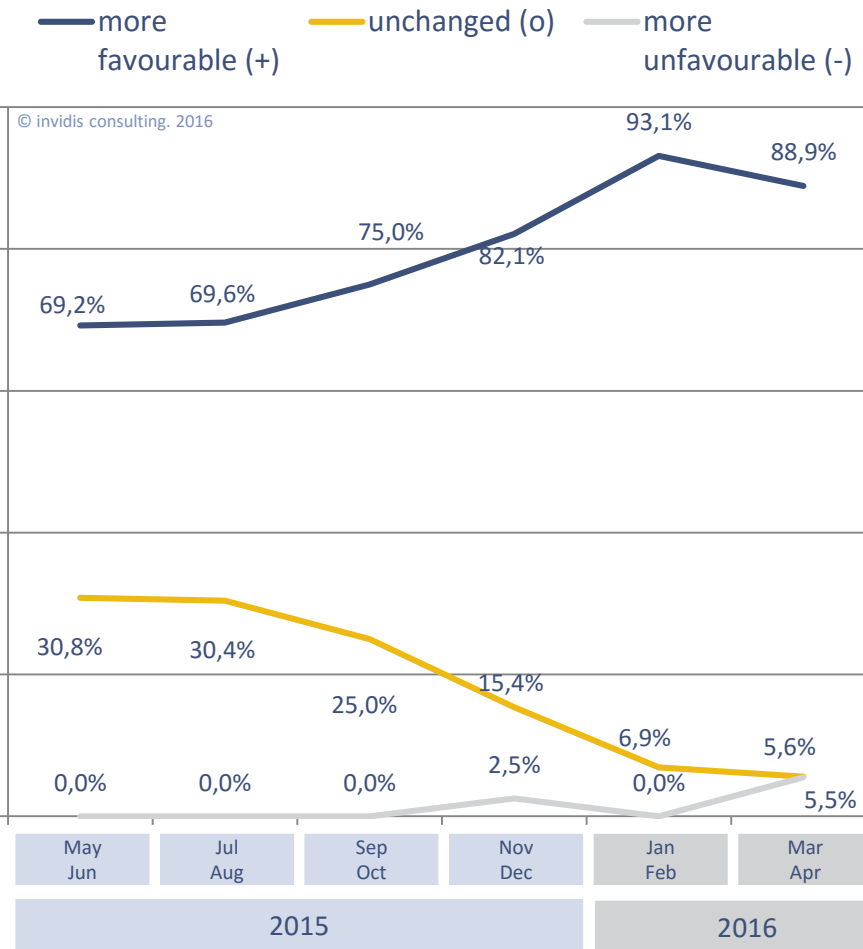
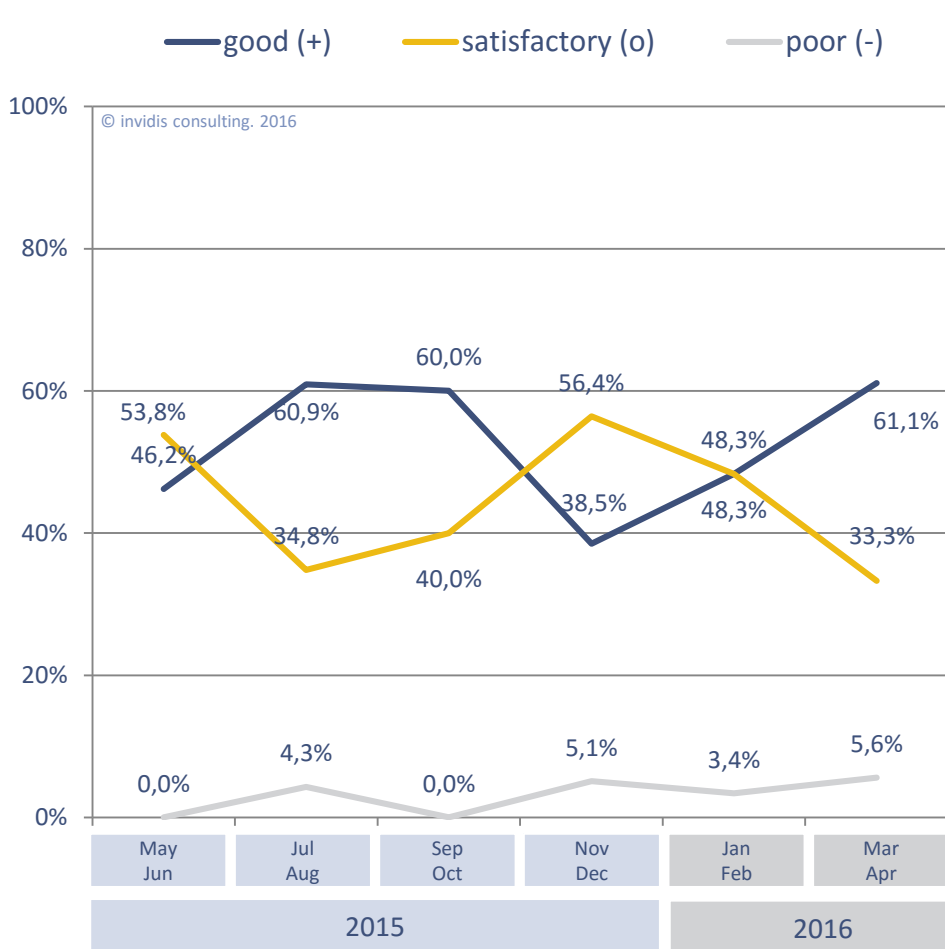


Fig. 2: DBCI ES/PT March | April 2016 „Business Situation ES“ rolling 12 months, n=18

Fig. 3: DBCI ES/PT March | April 2016 „Expectations ES“ rolling 12 months, n=18



Top 10 | Retail defends top spot, strong demand for DooH & QSR

Question: We would like to assess the dynamic for Digital Signage in the different vertical markets. In which vertical markets has your company realised the most projects in 2015? Please rate the Top 3 vertical markets.

- Retail is with little more than one quarter of all Digital Signage revenues the biggest vertical market. Customer engagement, marketing and ambient installations become more and more common not only in most high-street retailers, but also in small and medium businesses.
- Digital out of Home advertising is also a very interesting target market. 2015 saw good investments into this sector by the big advertising companies. With total revenues through selling advertising space rising by 12% YoY.¹⁾
- The QSR & Restaurant vertical market has shown the highest dynamic over the last year. Particularly many menu board networks have been rolled out in 2015 like at Burger King, Pans and Company and 100 Montaditos.

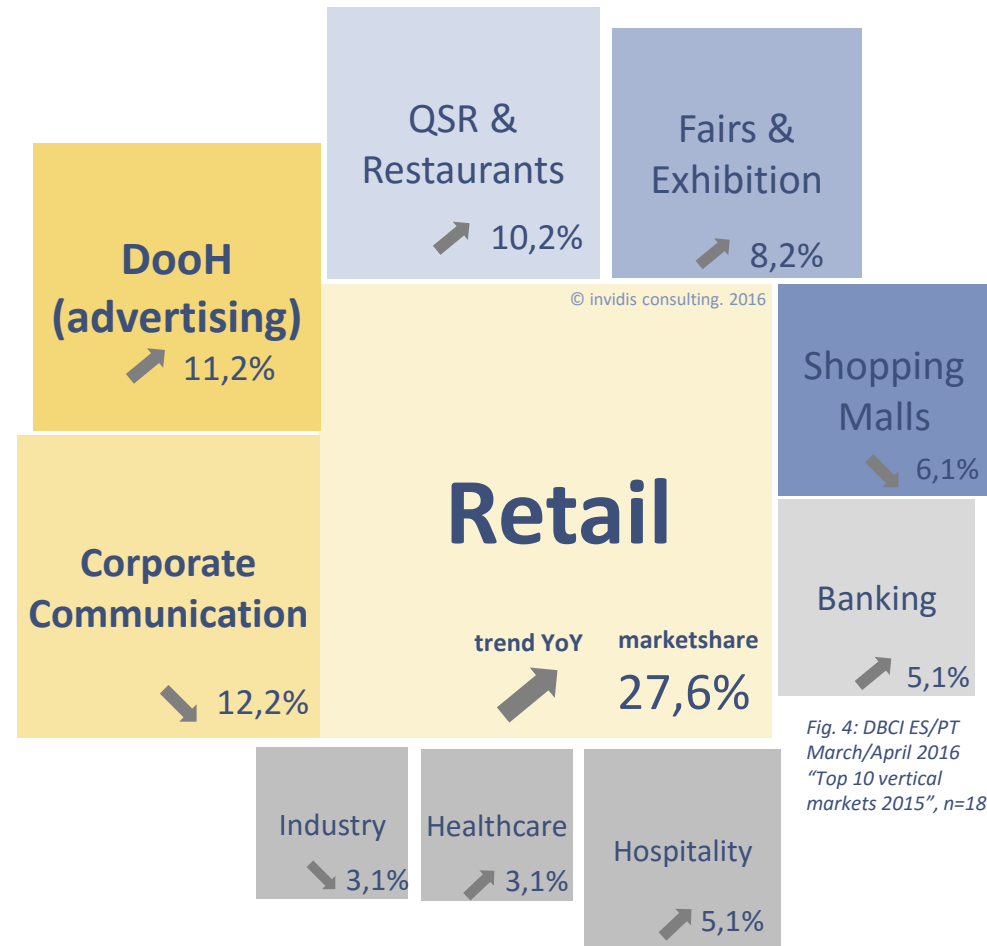


Fig. 4: DBCI ES/PT March/April 2016 "Top 10 vertical markets 2015", n=18

1) Source: Zenitmedia



Installation of new networks & cross-media bundling will drive DooH

Question: Which factors will primarily lead to an increasing market share of DooH?

- The most important driver for Digital out of Home in Spain will be the installation of new networks in the future. This development has started already in the last year, as investments in DooH have markedly increased (cf. p.4)
- The second main driver for DooH in the future will be cross-media bundling for dynamic campaigns i.e. online video. About 33% of all DooH market participants expect this development to give the industry the most positive impulse in the next years.
- Investments in existing networks are increasingly shifted from installing new locations or displays to upgrading the existing technology (hardware / software)

Reasons for future DooH growth

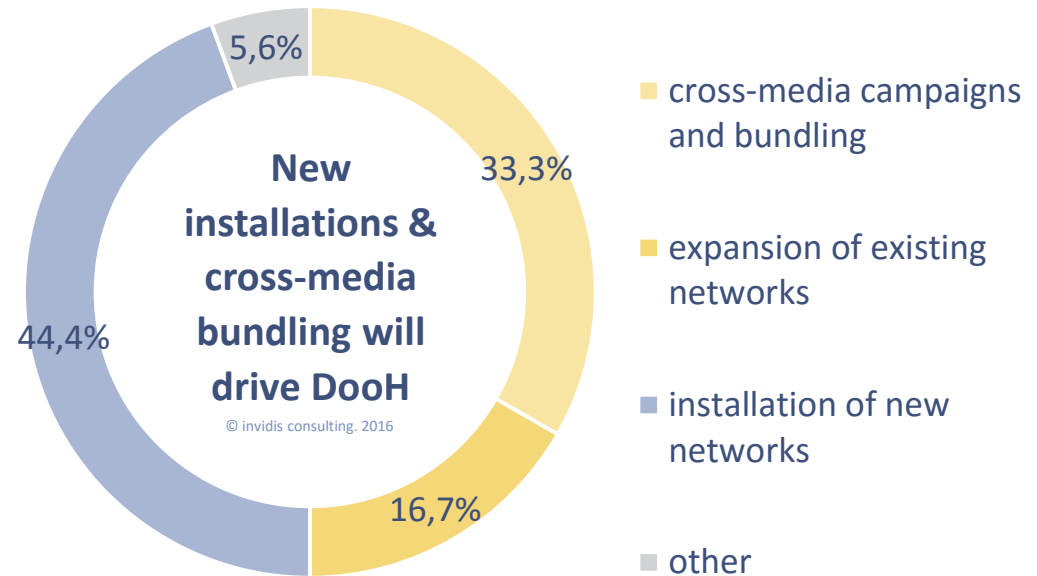


Fig. 5: DBCI ES/PT March | April 2016 "growth reasons DooH", n=18



DBCI | Roadmap 2016 & Contact

2016	
January	
February	
March	
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 18-19. The next planned publication date will be in week 21
- 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» 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

