Spain
Portugal
July | August 2016

DBCI

The pulse of the Digital Signage and DooH industry

DIGITAL SIGNAGE FEDERATION

Digital Signage & DooH Business Climate Index

invidis CONSULTING

DIGITAL SIGNAGE SUMMIT

invidis research
2016 ES 400

Stable Digital Signage market business sentiment in the summer

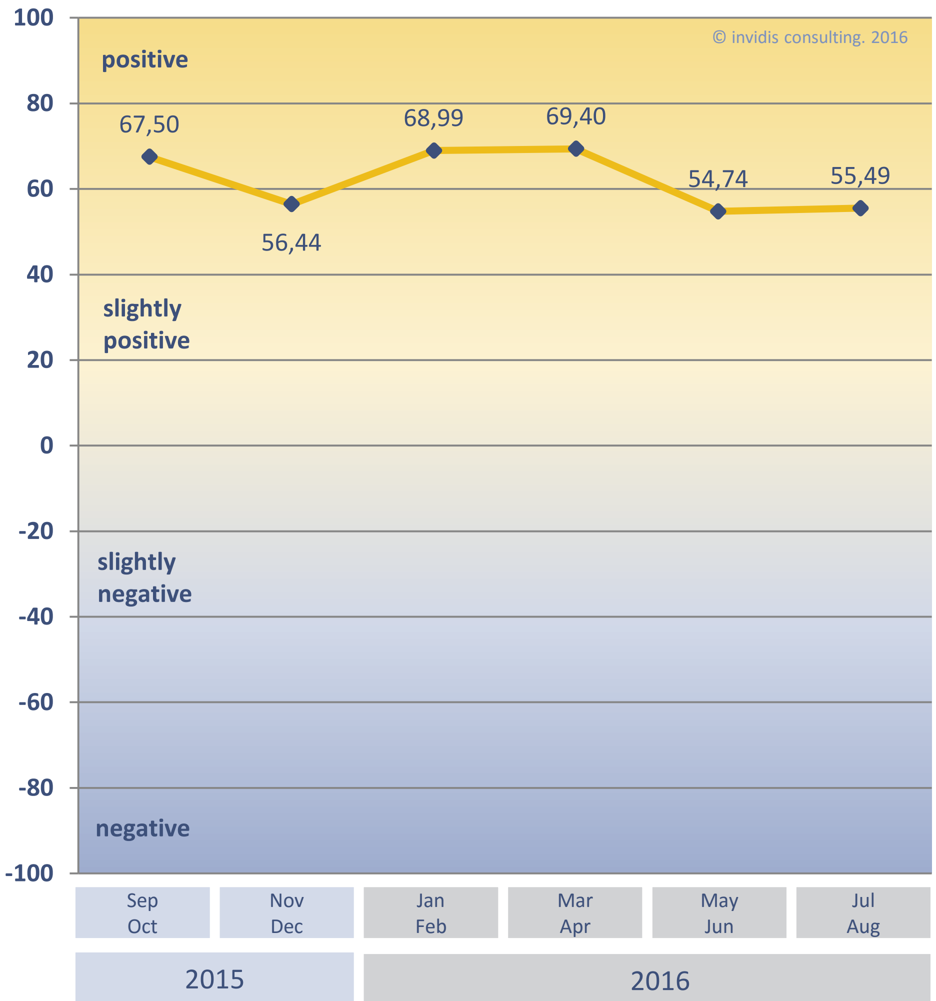


Fig. 1: DBCI ES/PT July | August 2016 "business situation", n=18

Participants: n=18; Region: España & Portugal: Time frame: 2016 weeks 29-30

- Since the last survey in May the Digital Signage Business Climate Index in Spain and Portugal has remained almost flat with only a small nominal increase by 0,75 base points from 54,74 base points to 55,49 base points. In total the Index is down by 12,1% year-on-year and up by 1,4% compared to the previous survey.
- The conservative assessment of the current business situation for products and services in the Digital Signage and Digital-out-of-Home industry has grown and dominates the index Together with a significant decline of the negative assessment it is responsible for the overall stable trend of the index. Also now over 80% of all market participants are currently expecting a more favourable business climate within six months.

Further Research

- Over 90% of the polled companies in Spain and Portugal have growing revenues in 2016. Still 6% of the market participants had to accept a decline in revenues in the first two quarters of 2016. However, all of those companies are expecting to balance the losses at the end of the year.
- The market is very concerned by the prospect of an economic fallout due to the current challenging political situation in Spain.

	year-on-year	*previous survey*
change DBCI 2016 #4	-12,1%	+1,4%

More conservative current business situation & very good expectations

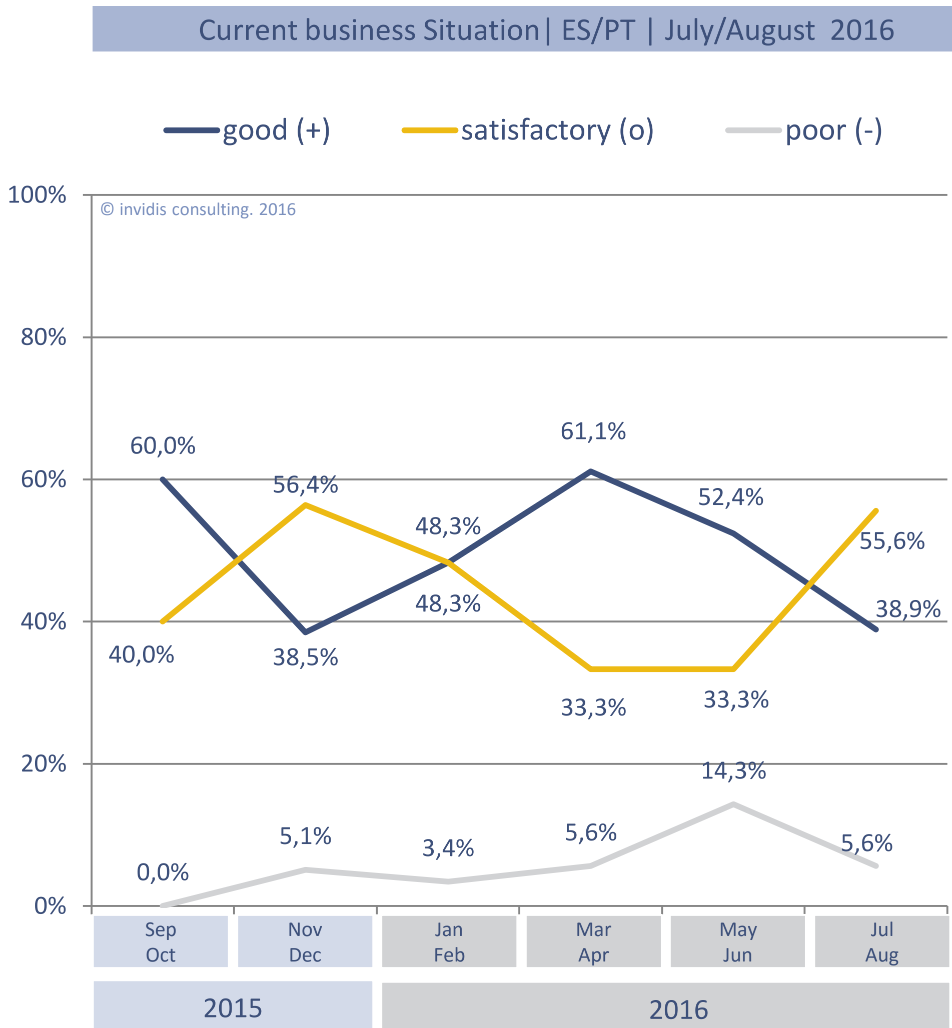


Fig. 2: DBCI ES/PT July | August 2016 „Business Situation ES“ rolling 12 months, n=18

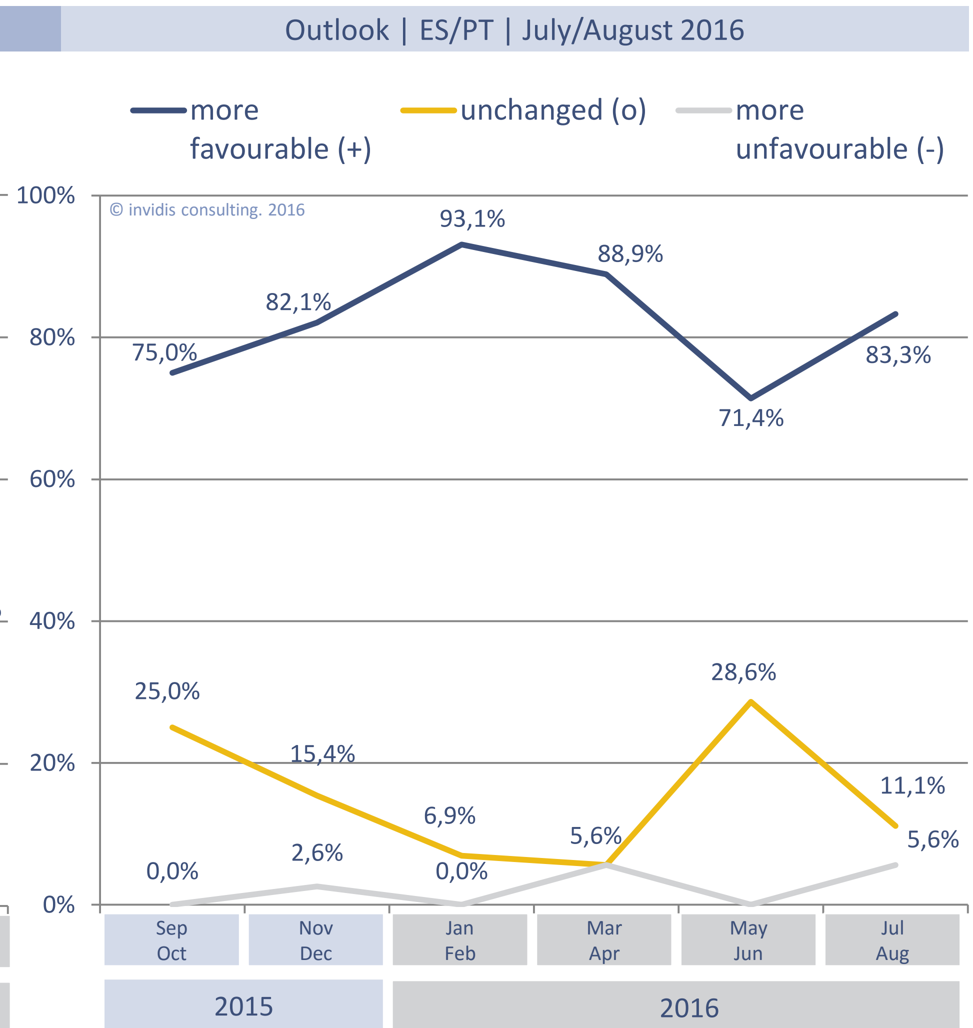


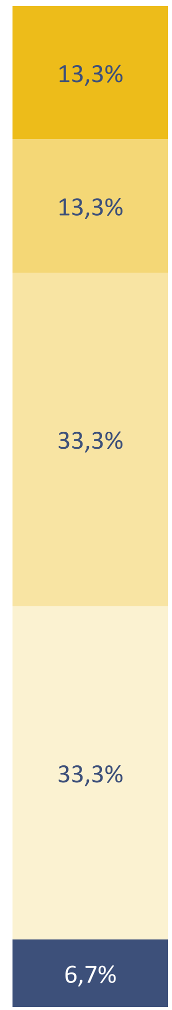
Fig. 3: DBCI ES/PT July | August 2016 „Expectations ES“ rolling 12 months, n=18

First semester 2016 with considerably higher revenues than 2015

"The revenues in the first half year 2016 have … in comparison to the revenues of the same period in the previous year."

93,3% of all polled companies could generate in parts a clear increase in revenues in the first half year term in 2016 compared to the same period in the previous year

Only 6,7% of all polled companies had to accept a decrease in revenues compared to the previous year



Legend

- grown very strong (more than +20%)
- grown strong (+10% to +19%)
- grown moderately (+5% to +9%
- grown slightly (+1% to +4%)
- unchanged (+/-0%)
- decreased slightly (-1% to -4%)
- decreased moderately (-5% to -9%)
- decreased strong (-10% to -19%)
- decreased very strong (more than -20%)

Fig.: 4 DBCI ES/PT July | August 2016 "revenues H1 2015-2016", n=15

Clear increase in revenues expected for the full year 2016

"The revenues in 2016 will … compared to the revenues in 2015."

All of all polled companies are expecting a healthy growth in revenues for the year 2016 compared with the previous year

Non of all polled companies expect a decrease in revenues compared to the pervious year

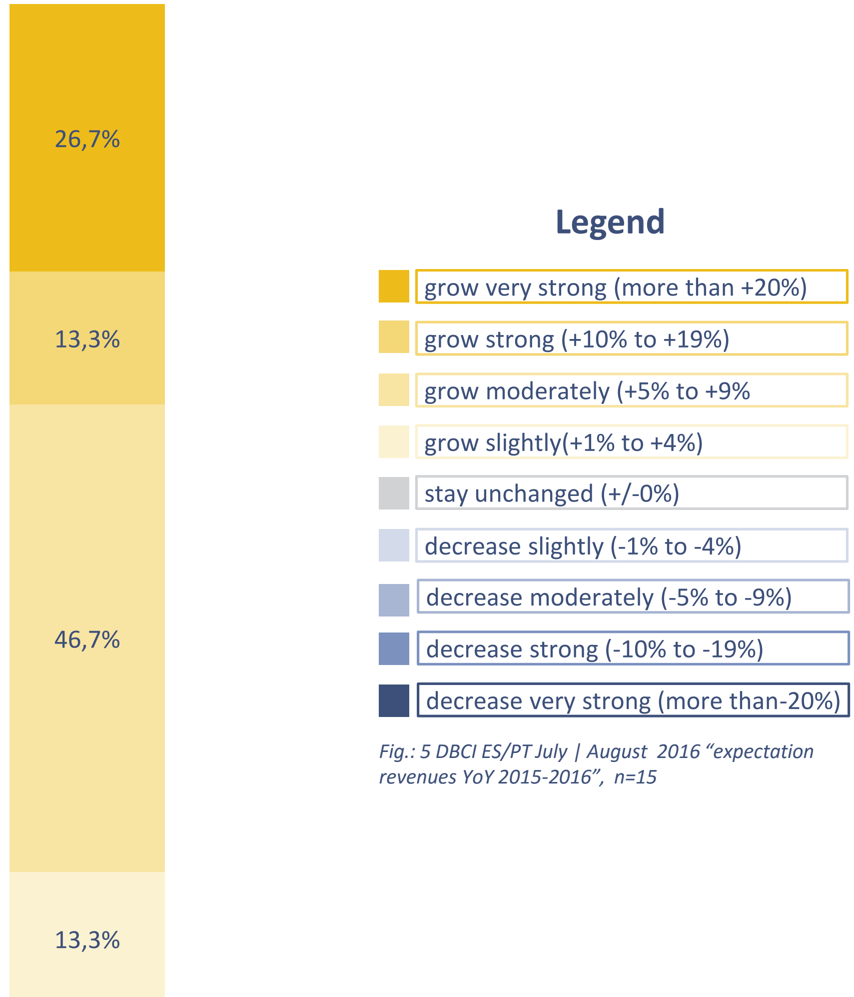
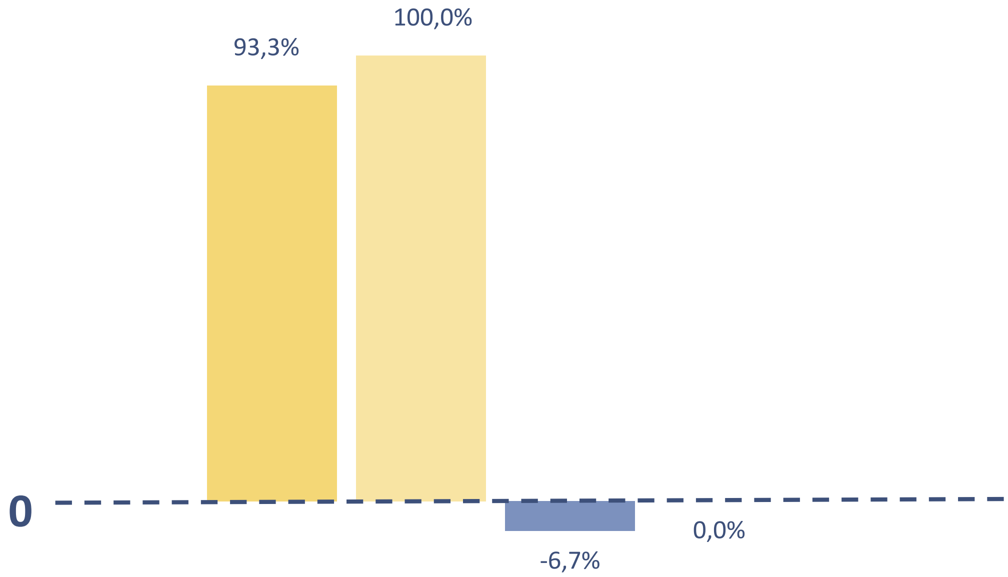


Fig.: 5 DBCI ES/PT July | August 2016 "expectation revenues YoY 2015-2016", n=15

First semester losses expected to be contained later this year



Percentage of polled companies which have registered a growth respectively a decline in revenues in H1 2016, compared to the same period in the previous year

- YoY H1 2015-2016 growth
- YoY 2015-2016 growth expected
- YoY H1 2015-2016 decrease
- YoY 2015-2016 decrease expected

Fig.: 6 DBCI ES/PT July | August 2016 "revenues YoY H1 2015-2016 and YoY 2015-2016", n=15

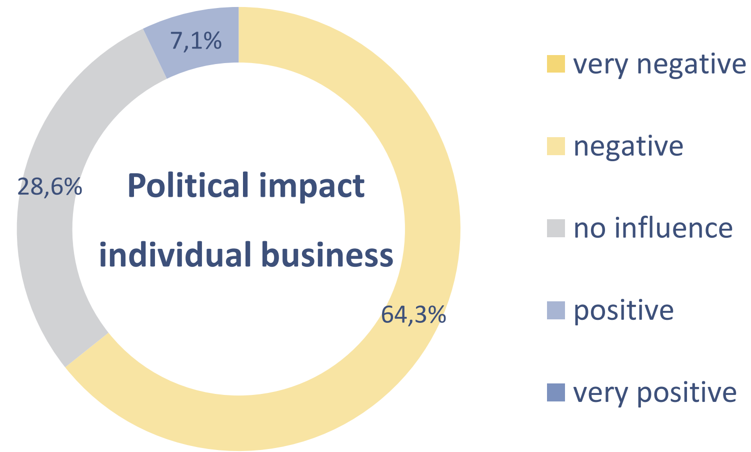
- Over 90% of the polled companies in Spain expect to have a growth in revenues in 2016 compared to 2015
- Still 6,7% of all polled companies had to accept a decline in revenues in the first six months of 2016. However all of those companies are expecting to have balanced the losses at the end of the year
- Traditionally the IT business has a relative calm period in the summer, followed by a strong showing towards the end of the year

Political situation with big influence on Digital Signage market

***Question 1**: How do you expect the current challenging political situation in Spain will influence your company/business?*

***Question 2:** How do you expect the current challenging political situation in Spain will influence your national Digital Signage and Digital out of Home market?*

- Almost 65% of the polled companies are definitely concerned for their business by the prospect of an economic fallout due to the current challenging political situation in Spain.
- The percentage who see a big influence of the crisis is even higher for the assessment of the general Digital Signage and Digital-out-of-Home economy in the country.
- In Europe the Digital Signage industry is still very much concentrated on a local or national region. Therefore most companies are effected greatly by regional economic uncertainty



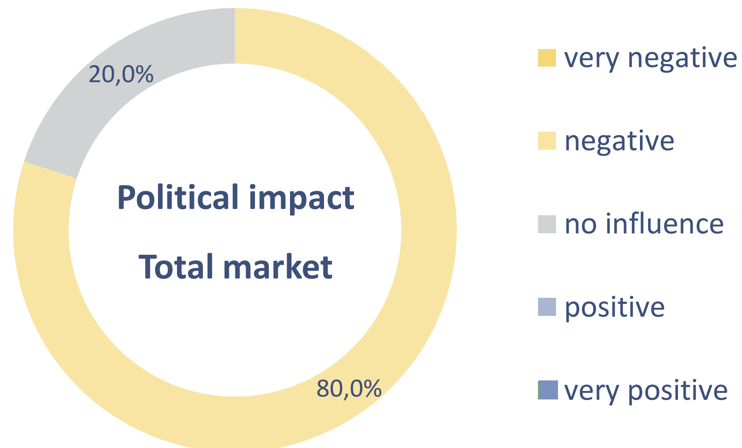


Fig. 7: DBCI ES/PT July | August 2016 "political situation", n=15

DBCI | Roadmap 2016 & Contact

2016	
January	
February	
March	
April	
May	
June	
July	
August	
September	DBCI Sep./Oct. | WN41
October	
November	DBCI Nov./Dec. | WN48
December	

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

- The next survey will take place in calendar weeks 38-39 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
Daniel Russell | Research Analyst
Daniel.Russell@invidis.com
Phone: +49 89 2000416-21

DSS | The Digital Signage Summit series

DIGITAL SIGNAGE SUMMIT

THE LEADING DIGITAL SIGNAGE AND DIGITAL OUT OF HOME STRATEGY CONFERENCE 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

A JOINT VENTURE BETWEEN: Integrated Systems Events invidis