

Spain
Portugal
2nd Quarter 2017

DBCI



Digital Signage & DooH
Business Climate Index

The pulse of the Digital Signage
and DooH industry



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CONSULTING



**digital
signage
summit
europe**

05-06 JULY 2017
MUNICH
GERMANY

invidis research
2017 ES 200



Robust Digital Signage business sentiment in the second quarter



- The Digital Signage Business Climate Index has slightly decreased, but still remains on a positive level in the second quarter of 2017. The index fell by 4,29 base points from 49,99 points to 45,70 base points.
- With neutral answers increasing by 8% the assessment of the current business situation has become more conservative than in the previous survey.
- Also the outlook towards the near future is on a decline. Now only 60% of the surveyed companies are expecting an *more favourable* business situation for their products and services in the next six months.
- Overall the Digital Signage industry has started well into the year, but expects to have a rather quiet second quarter. The market is not quite as dynamic as anticipated. Traditionally the second quarter is always trailing behind the first quarter.
- Microsoft Windows is still the major player in the OS market for Digital Signage installations. However, Linux is gaining traction and was implemented in 28% of all projects in 2016.

change DBCI 2017 #2

year-on-year	previous survey
-34,1%	-8,6%

Fig. 1: DBCI ES/PT 2nd Quarter 2017 "business situation", n=23

Participants: n=23; Region: España & Portugal; Time frame: 2017 weeks 14-15



More conservative business situation & increasingly cautious expectations

Current business Situation | ES/PT | 2nd Quarter 2017

Outlook | ES/PT | 2nd Quarter 2017

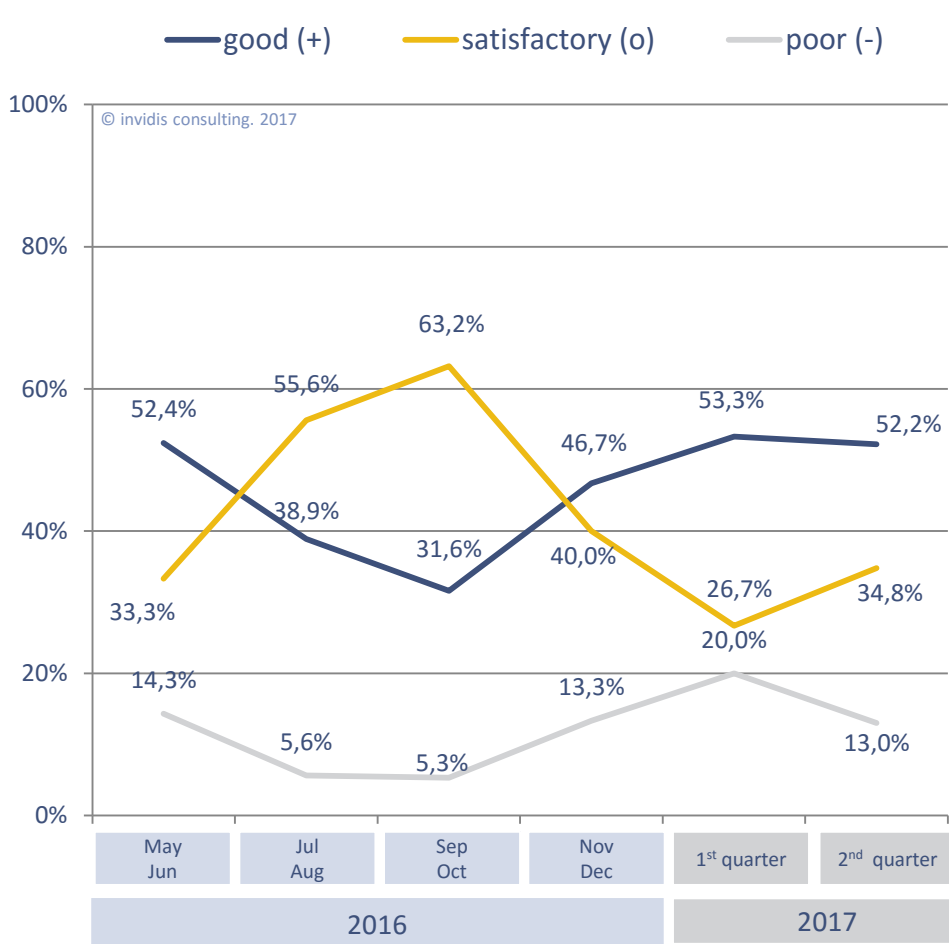


Fig. 2: DBCI ES/PT 2nd Quarter 2017 „Business Situation ES“ rolling 12 months, n=23

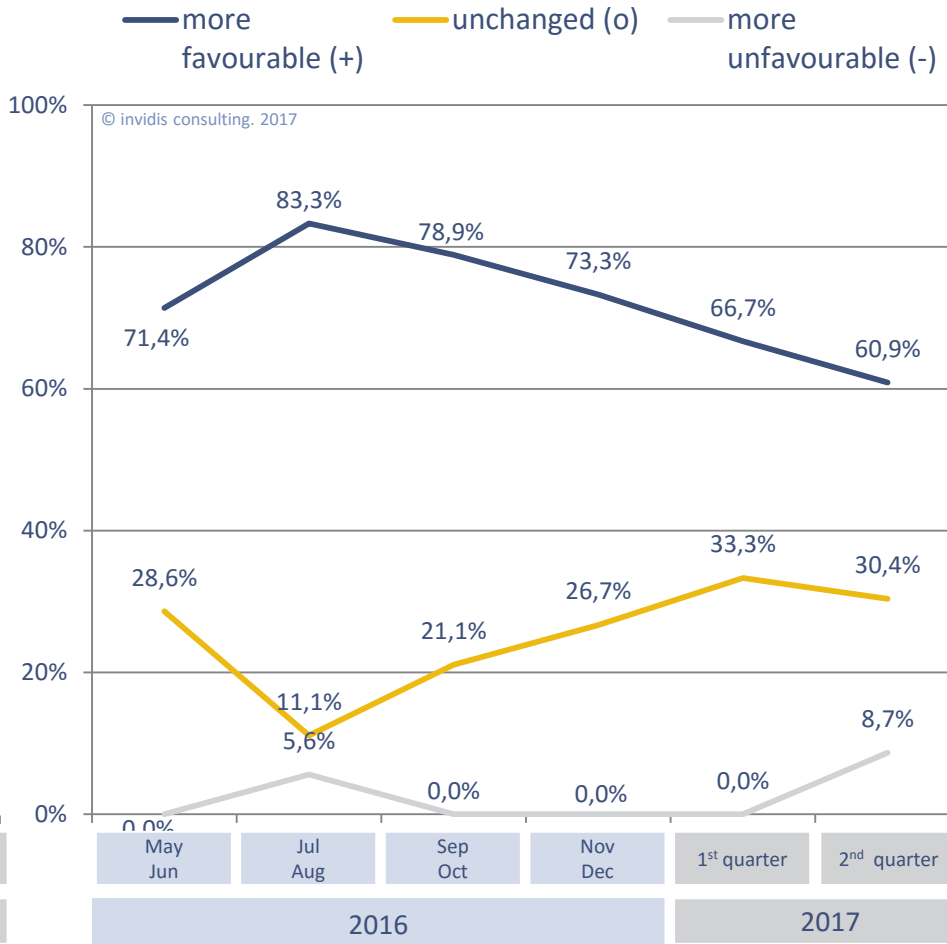


Fig. 3: DBCI ES/PT 2nd Quarter 2017 „Expectations ES“ rolling 12 months, n=23



OS 2016 | Windows in first and Linux challenges

Question: How high was the percentage of operating systems used in Digital Signage Projects in 2016?

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 consistently 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.

Also cost effective systems operating on Android 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 2016

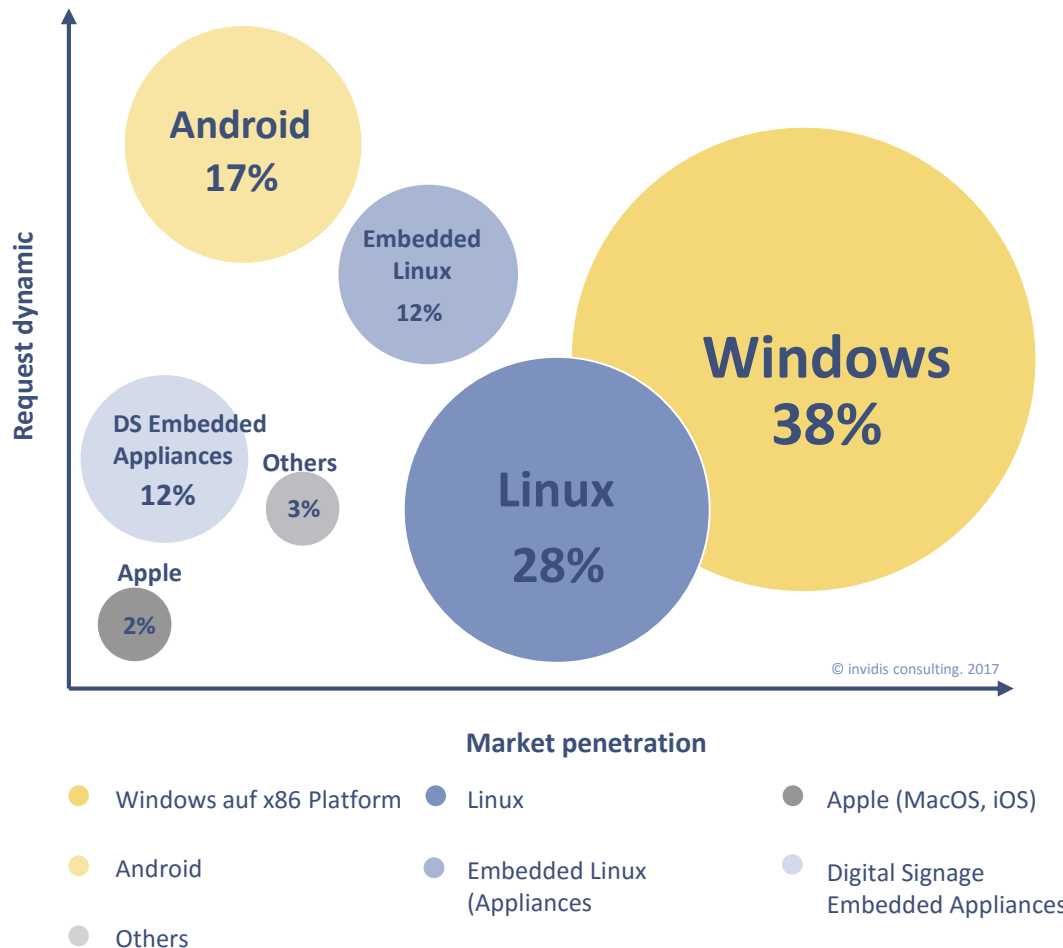


Fig. 4: DBCI 2nd Quarter 2017 "operating systems 2016", n=19



Roadmap 2017 & Contact

2017
January
February
March
April
May
June
July
August
September
October
November
December

← **3rd quarter | 2017**

← **4th quarter | 2017**

- The DBCI has recalibrated its iteration from a two month period to a three month period starting in 2017
- The next survey will take place in calendar weeks 27-28 of 2017. The next planned publication date will be the first week of August 2017
- 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 2017. 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» is the leading event series for digital signage conferences in EMEA and North America
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- 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
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 - DSS Europe | Munich: 5.-6. July 2017
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 - DSS Russia | Moscow: October 2017
 - DSS Africa | Johannesburg: October 2017
- More information at digitalsignagesummit.org