



Out-of-home Video
Advertising Bureau
Europe

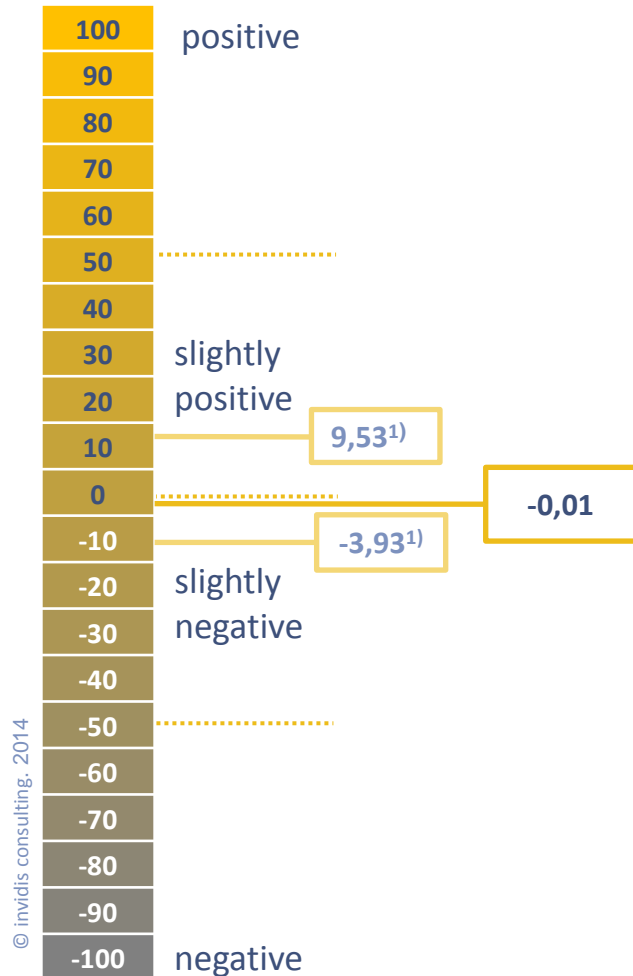
OVAB-cooperation partner Italy:



invidis
CONSULTING

OVAB Europe / AssoDS
Digital Signage Business Climate Index January/February 2014
Italy

12. February 2014



- The Digital Signage Business Climate Index Italy has slightly decreased in January-February 2014. The neutral rating of the index mirrors the overall economic situation in Italy, i.e. a very slow recovery from a low level
- However the negative answers have significantly declined and the polled companies show an overall more satisfied business sentiment
- The Italian Digital Signage market is primarily held up by the restrictive investments, a high pricing pressure and bureaucratic hindering's

Additional Questions

- Between 20-50 job openings in 2013

Survey facts

- Participants: n=24
- Region: Italy
- Time frame: 7. – 17. January 2014

Fig. 1: DBCI Italia January/February 2014
 1) DBCI Italia September/October ; November/December 2013

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



Fig. 2: DBCI Italia January/February 2014 "business situation", n=24

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

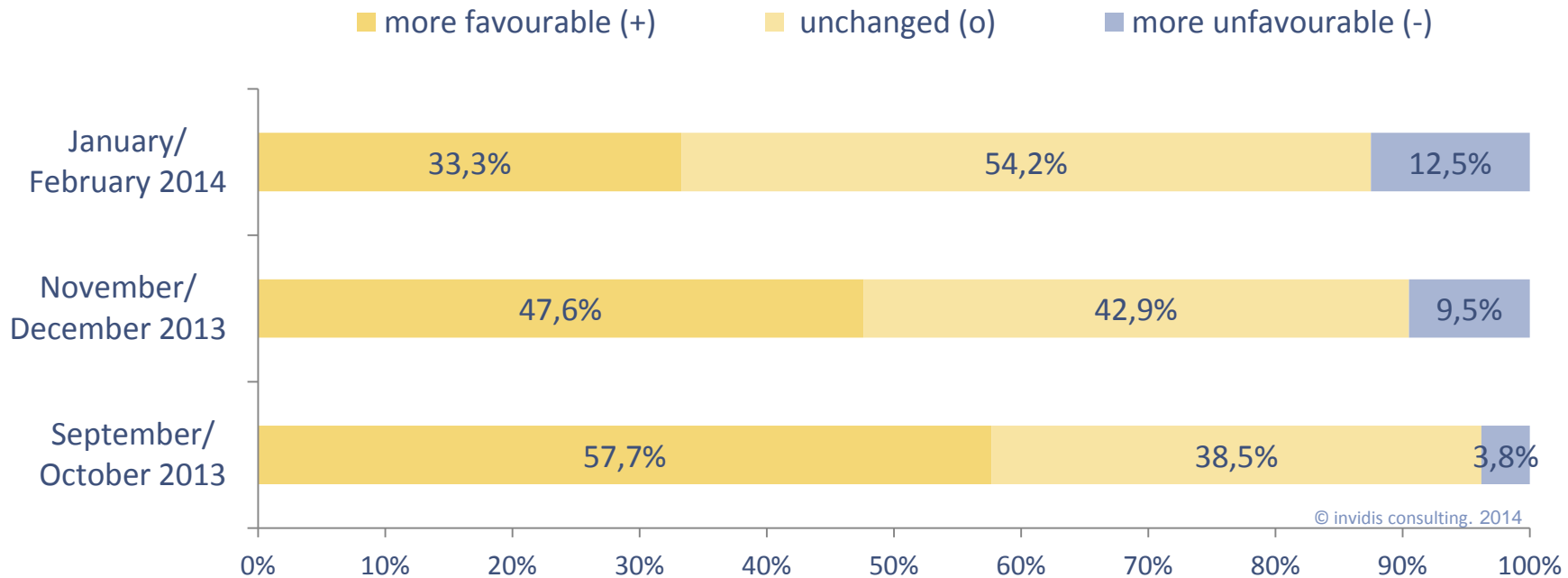


Fig. 3: DBCI Italia January/February 2014 "business expectations", n=24

DBCI January/February 2014

ADDITIONAL QUESTIONS

Question: Did the number of employees in your company increase in 2013?

- 40,9% of all polled companies have hired new staff in 2013
- Between 20-50 new jobs were created by the Digital Signage industry in Italy
- Generally a high demand for well trained and qualified personal is registered
- Particularly the increasing verticalisation leads to a need in pesonal from different industy branches

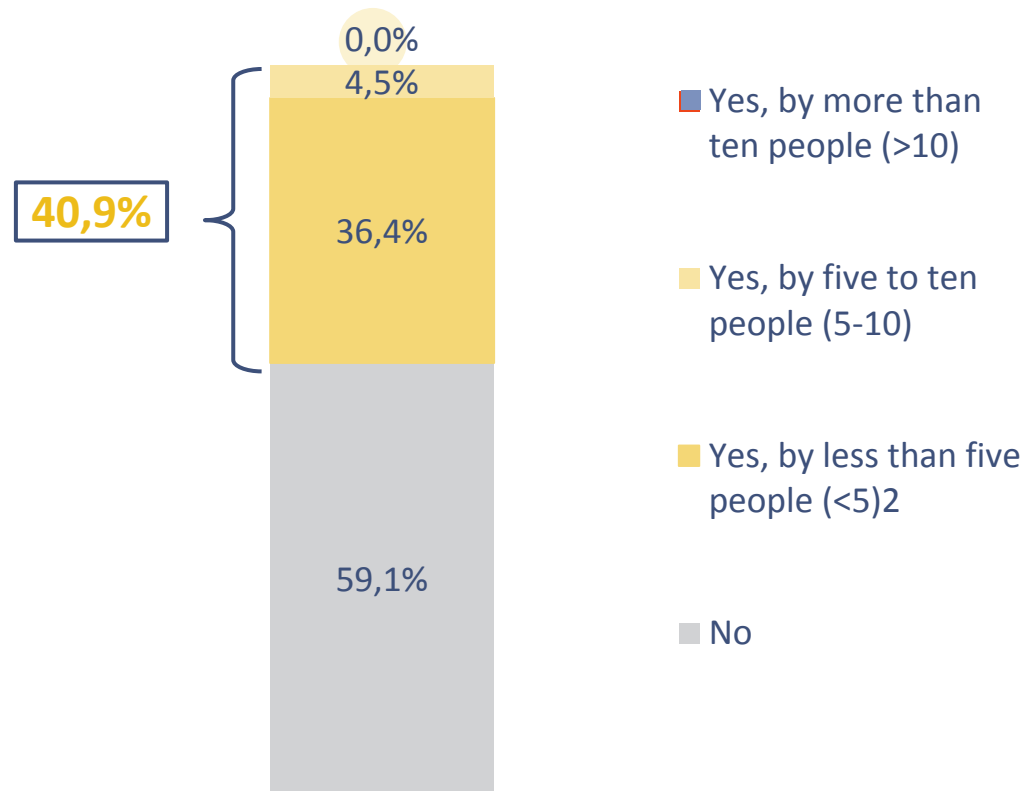
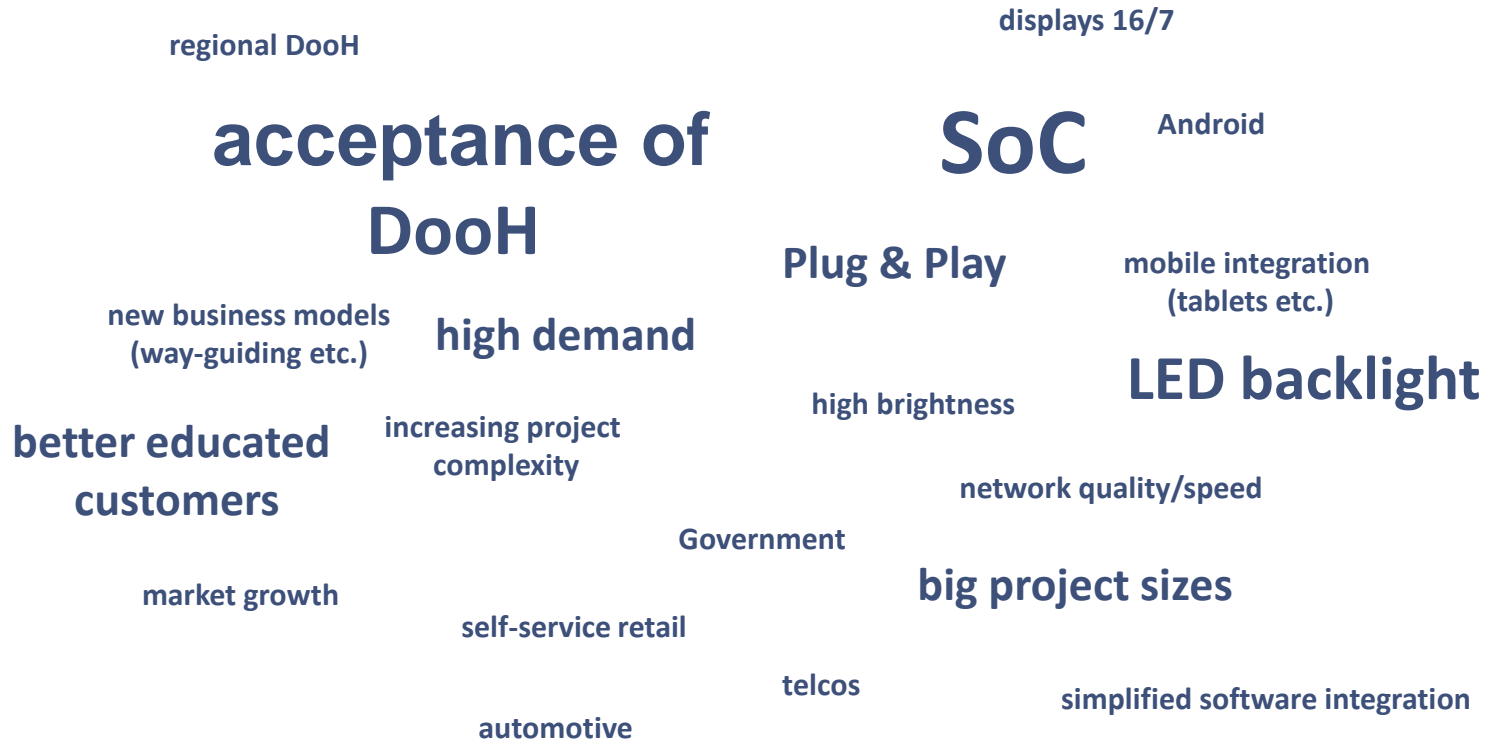


Fig. 4: DBCI Italia January/February 2014 "Digital Signage hirings 2013", n=22

Tops 2013



© invidis consulting. 2014

Fig. 5: DBCI January/February 2014 „Tops 2013“, n=51

Flops 2013



© invidis consulting. 2014

Fig. 6: DBCI January/February 2014 „Flops 2013“, n=51

Trends 2014



© invidis consulting. 2014

Fig. 7: DBCI January/February 2014 „Trends 2014“, n=56

DBCI January/February 2014

SPECIAL:

INVIDIS DIGITAL SIGNAGE FOCUS MARKETS

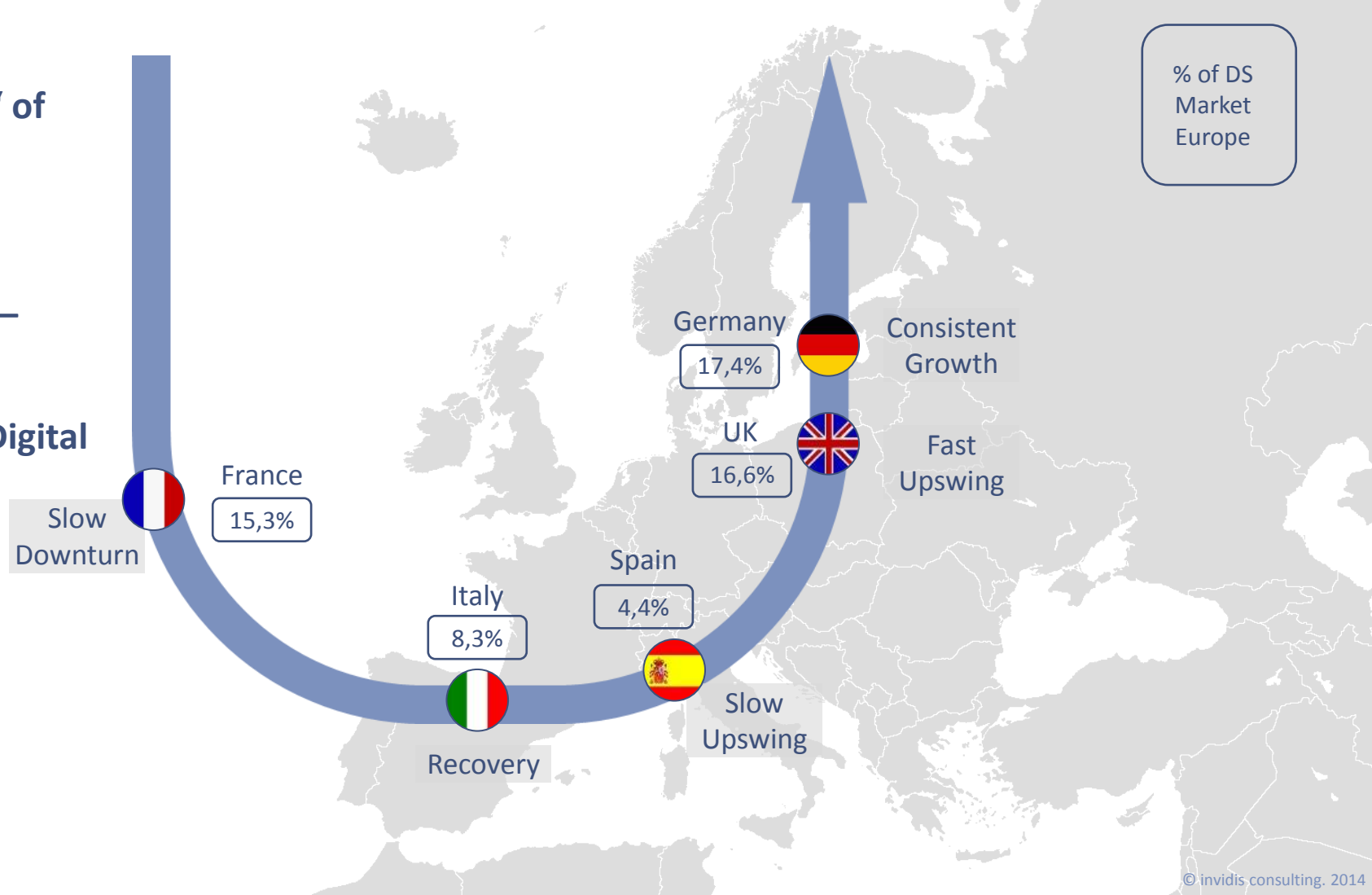
EMEA 2014



The 'bookends' of the European economy

– **Germany** and the **UK** –

both, high performers in Digital Signage



2014
January
February
March
April
May
June
July
August
September
October
November
December

← **Mar./Apr. | 27.03.**

← **May/Jun. | 22.05.**

← **Jul./Aug. | 24.07.**

← **Sep./Oct. | 18.09.**

← **Nov./Dec. | 20.11.**

- The next survey will take place in calendar weeks 10-11 of 2014.
- The next planned publication date will be the 22nd of March 2014.
- 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 2014. For further information please contact Daniel Russell.

Contact:
 Daniel Russell | Junior Analyst
 invidis consulting GmbH
 Rosenheimer Str. 145e
 DE-81671 Munich
 Daniel.Russell@invidis.com
 Phone: +49 89 2000416-21
 Mobile: +49 151 62438503



invidis
CONSULTING

invidis consulting GmbH
consulting , research & communications

Managing Director: Florian Rotberg
Register Court: Amtsgericht München
Register No: HRB 165816
VAT-ID: DE 253 622 672

www.invidis-consulting.de