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Digital Signage Business Climate Index March/April 2014

Italy

15th of April 2014

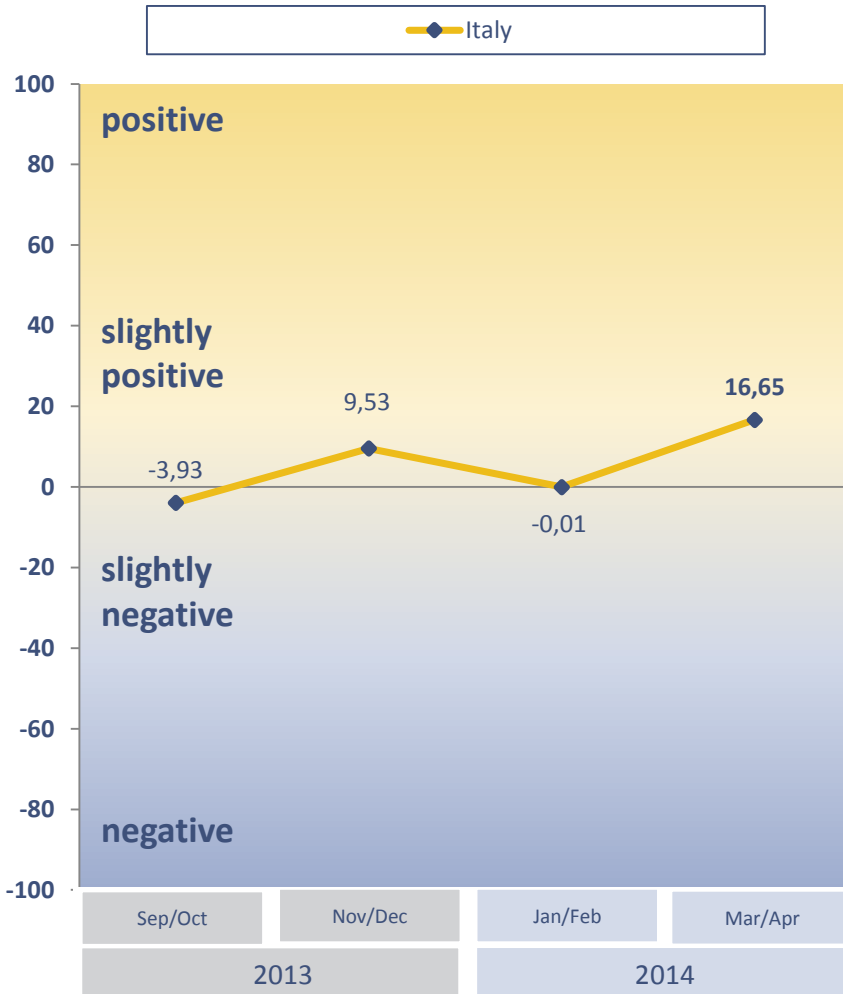


Abb. 1: DBCI March/April 2014 „Index Italy“, n=21

- The Digital Signage Business Climate Index (DBCI) in Italy has increased markedly since the last poll in January. The Index grew by 16,64 points to reach a slightly positive level
- The industry shows an increased satisfaction with the current business situation as 71,4% of all participants answered with good or satisfactory
- Similarly the expectations for the next six months are much better as almost 50% of all polled companies see the future more favourable
- The recent economic policy measures are believed to kick-start Italy's still ailing economy and boost exports which in turn will benefit the Digital Signage industry
- 75% of all Digital Signage projects in 2013 were smaller installations with up to ten displays

Survey facts

- Participants: n=21
- Region: Italy
- Time frame: 2014 calendar weeks 11 & 12

Increased satisfaction with the business situation

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

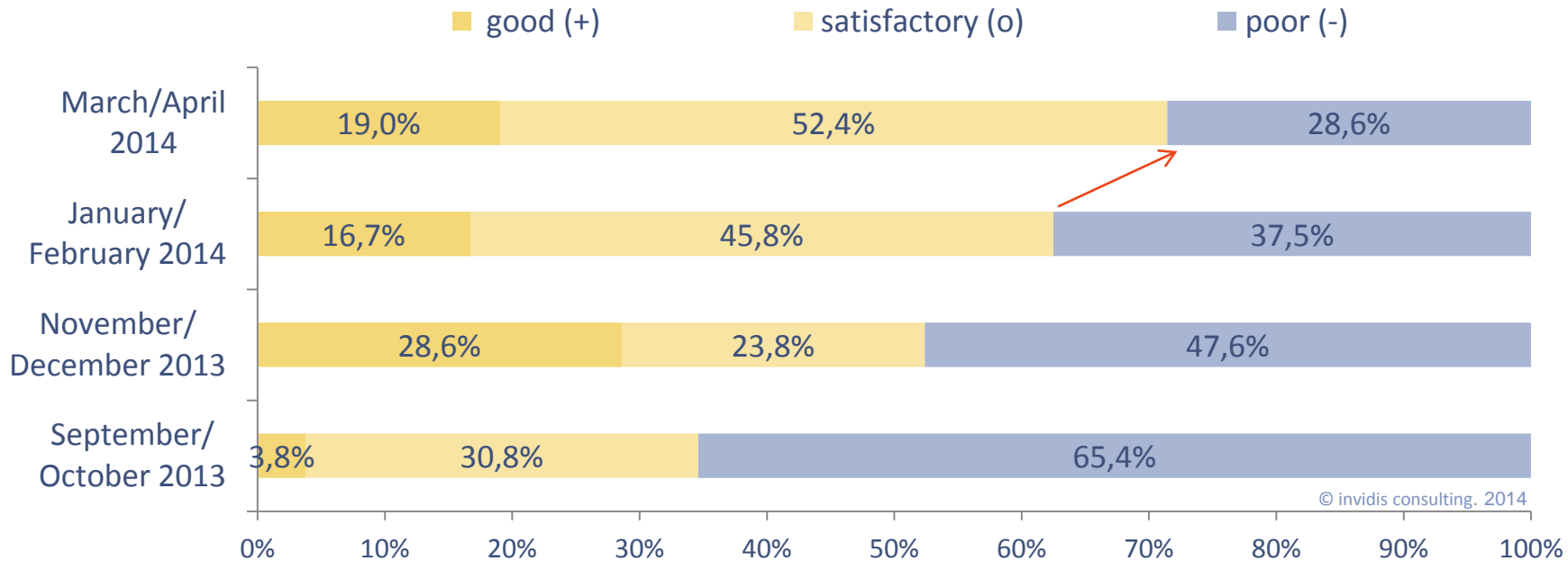


Fig. 2: DBCI Italia March/April 2014 "business situation", n=21

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

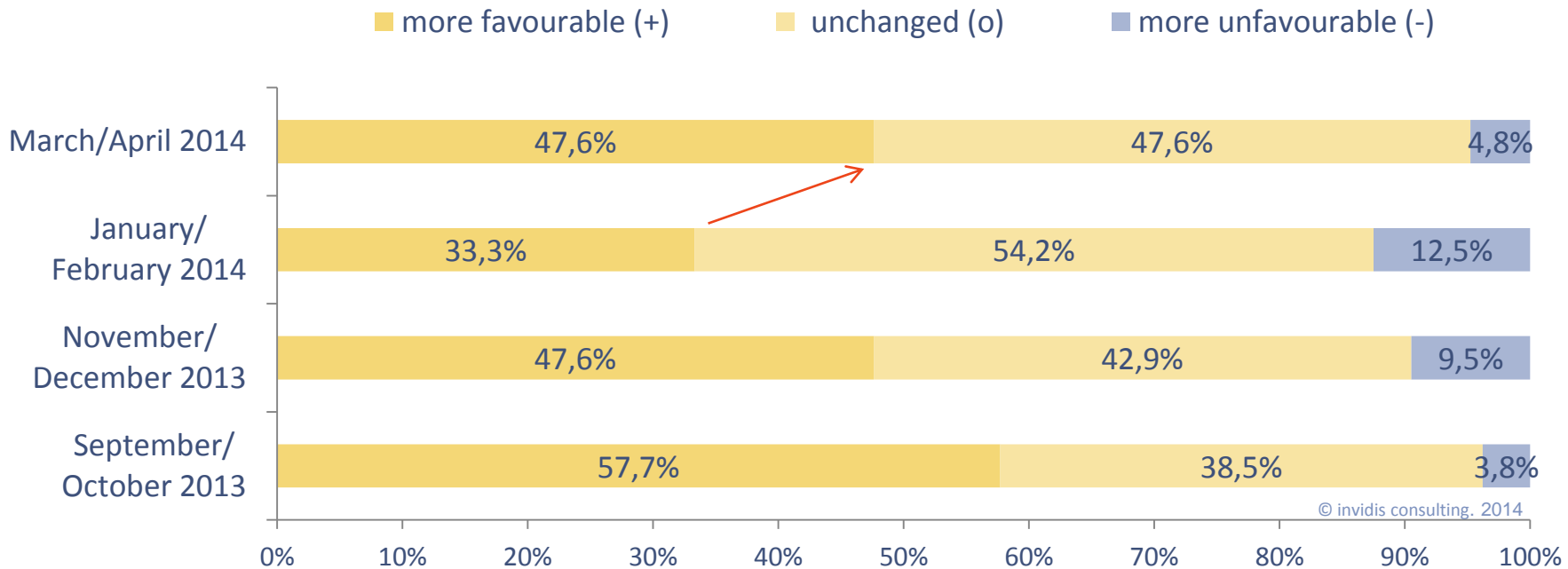


Fig. 3: DBCI Italia March/April 2014 "business expectations", n=21

DBCI March/April 2014

ADDITIONAL QUESTIONS

Question: How many projects did your company realize in the following categories in 2013?

- 75% of all DS projects in 2013 were smaller installations with up to ten displays
- Small projects have a high margin and can be carried out successfully by most players in the market
- Falling hardware prices created a high demand for easy-to-use Digital Signage solutions with small and medium size businesses, a sector most Italian companies can be attributed to
- Only 7% Digital Signage networks consist out of more than 100 displays. These can primarily be found in the transport and public sector
- Large projects generate high revenues, but discounts increase with the number of hardware used and tear into the margin. Moreover, only few market participants can sustainably carry out projects with over 100 displays

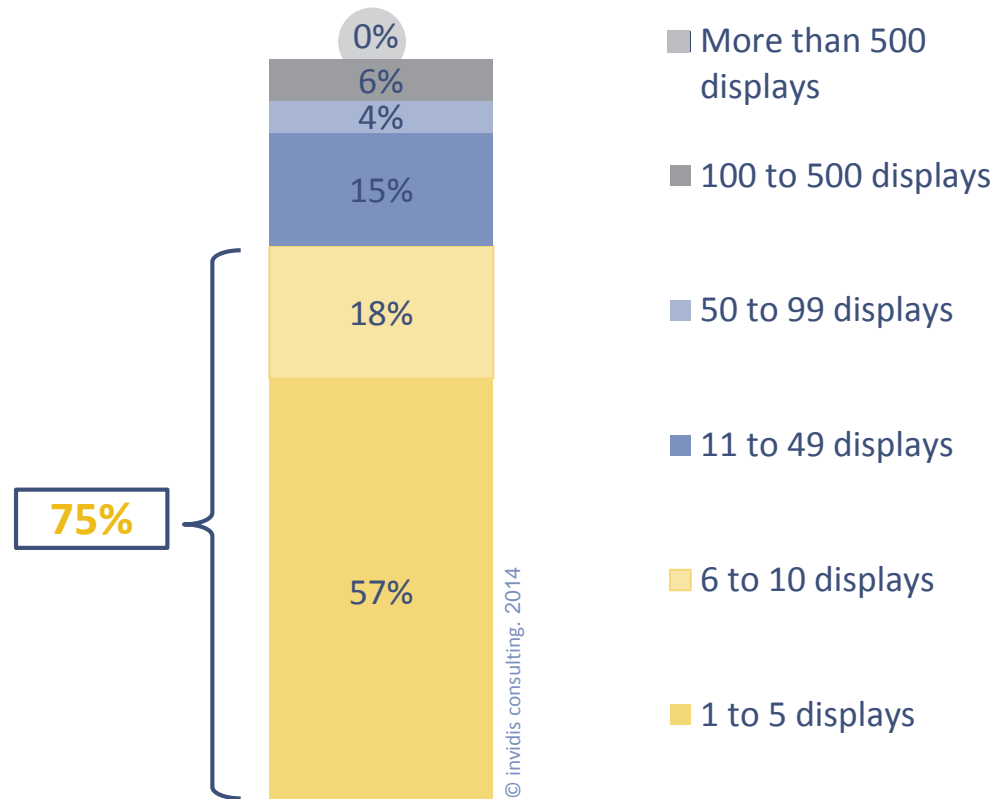


Fig. 4: DBCI Italia March/April 2014 "project sizes 2013", n=20

Retail is the most significant market for the Digital Signage industry

Question: In which vertical markets has your company realized the most projects in 2013?

- Retail is with approx. 40% 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
- Healthcare is the second biggest vertical market. Particularly popular are one to five screen installations in pharmacies and infotainment programs in doctors waiting rooms
- The corporate communication vertical market has grown exponentially over the last few years. The digitization of employee communications is now seen as a sustainable investment by many companies



Fig. 5: DBCI Italia March/April 2014 “vertical markets 2013”, n=18

1) food/non food, mall, banking, telecommunication

2) government & education

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

May/Jun. | 28.05.

Jul./Aug. | 24.07.

Sep./Oct. | 18.09.

Nov./Dec. | 20.11.

- The next survey will take place in calendar weeks 19 & 20 of 2014.
- The next planned publication date will be the 28th of May 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.

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Save the Date!
17. - 18. September
2014



digital signage

8th MUNICH CONFERENCE

17 – 18 September 2014
Kempinski Hotel Airport Munich





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