Italy

September | October 2014

DBCI

Digital Signage & DooH Business Climate Index

The pulse of the Digital Signage and DooH industry

invidis CONSULTING

OVAB-cooperation partner Italy:

AssoDS Associazione operatori Digital Signage

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2014 IT 500 en

General economic outlook puts dent in Digital Signage market

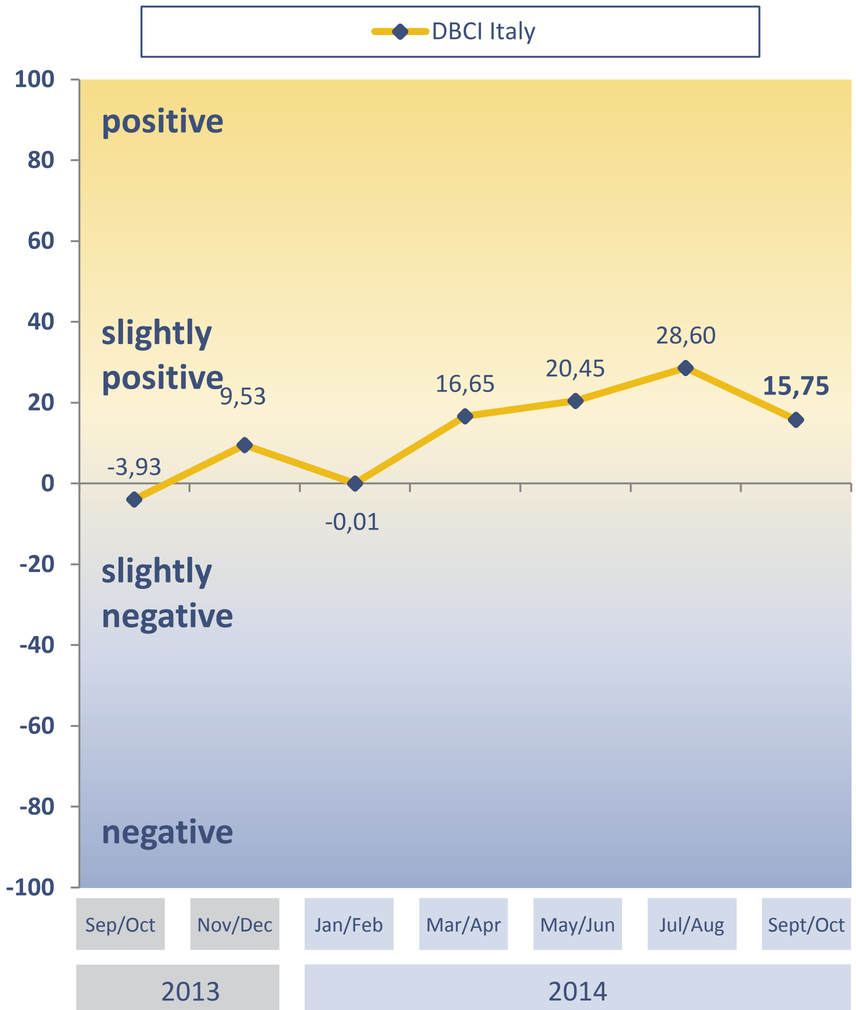


Fig. 1: DBCI September/October 2014 „Index Italy", n=19

- The Digital Signage Business Climate Index (DBCI) in Italy has decreased since the last poll in July. The Index lost by 12,85 points yet still remains on the "slightly positive" level
- In spite of a slight rise in the negative answers to 21%, the market still is by almost 80% satisfied or positive about their current business situation
- After a period of slight upturn for the general economy in Italy, the negative results from the second quarter have dampened the business climate of the IT and Digital Signage industry

Further research:

- The Digital Signage Market in Italy has registered robustly higher revenues in the first six months of 2014 compared to the same period in the previous year
- Also a clear year-on-year increase in revenues is expected for the full year 2014. Some market participants who suffered loses in the first six months predict to have contained them until the end of the year

Survey facts
- Participants: n=19
- Region: Italy
- Time frame: 2014 calendar weeks 35-36

Slightly lower positive current business situation

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

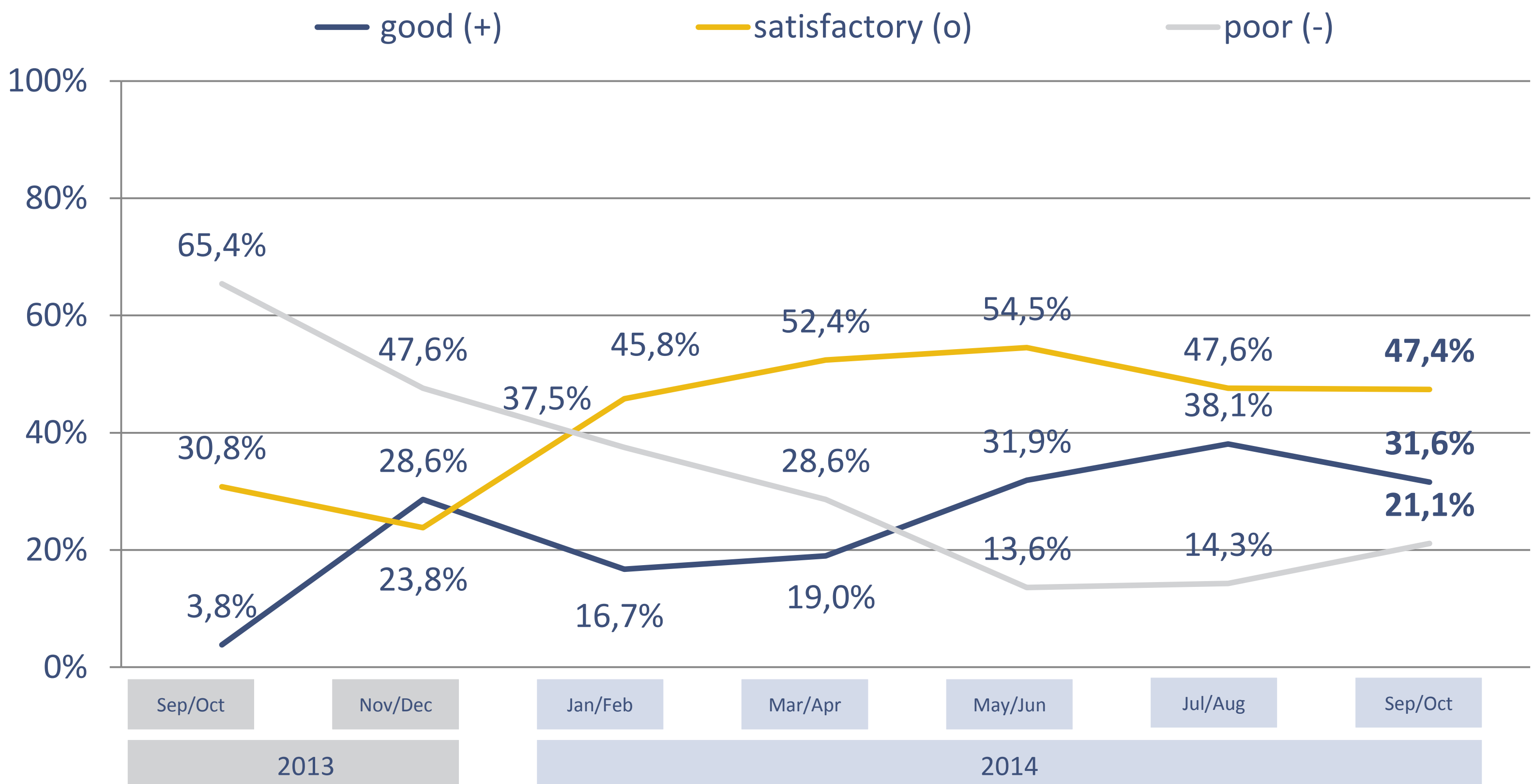


Fig. 2: DBCI Italia September/October 2014 "business situation" , n=19

Stable outlook for the next six months

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

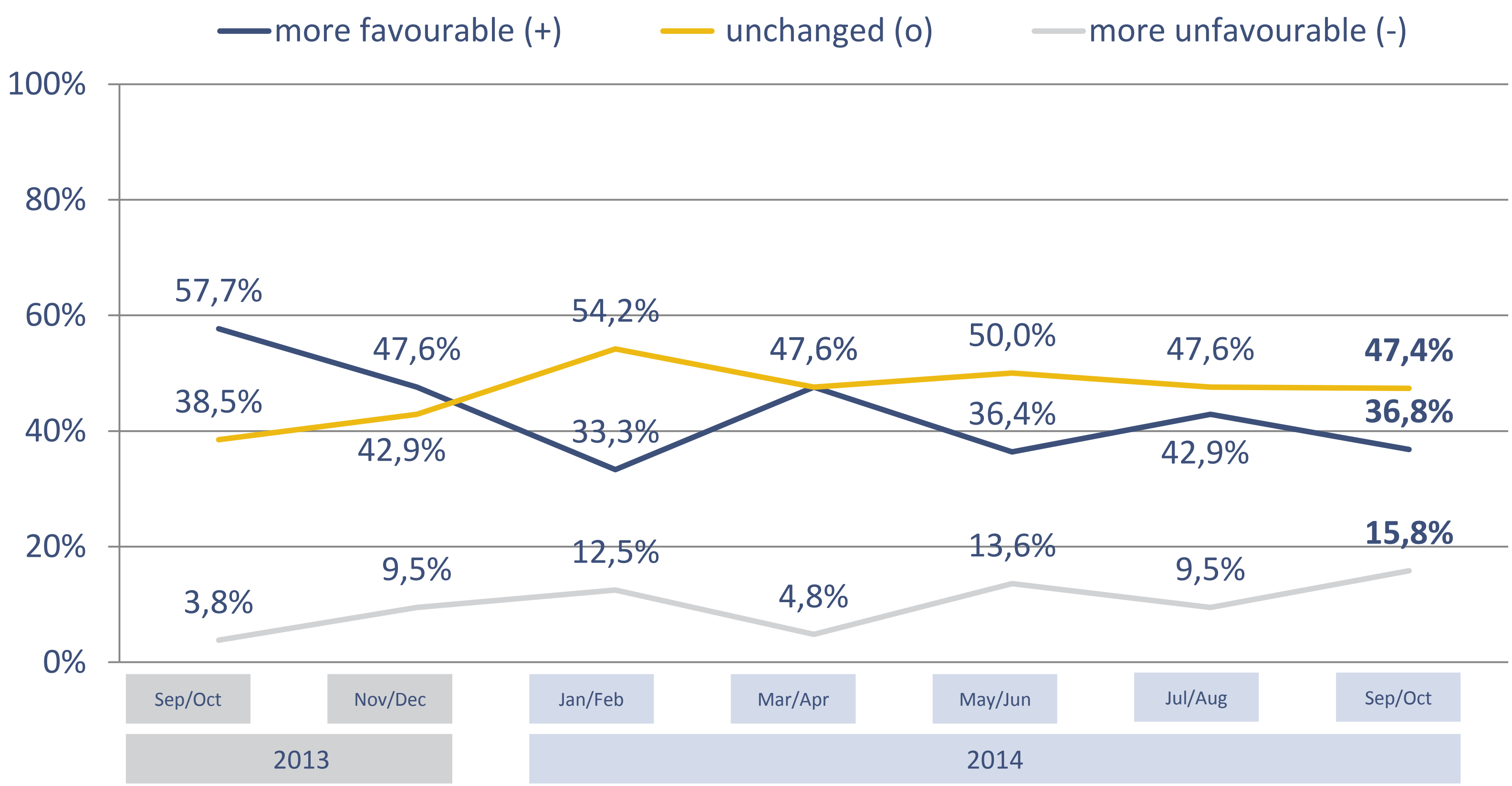


Fig. 3: DBCI Italia September/October 2014 "business situation" , n=19

Positive business sentiment dominates in all markets across Europe

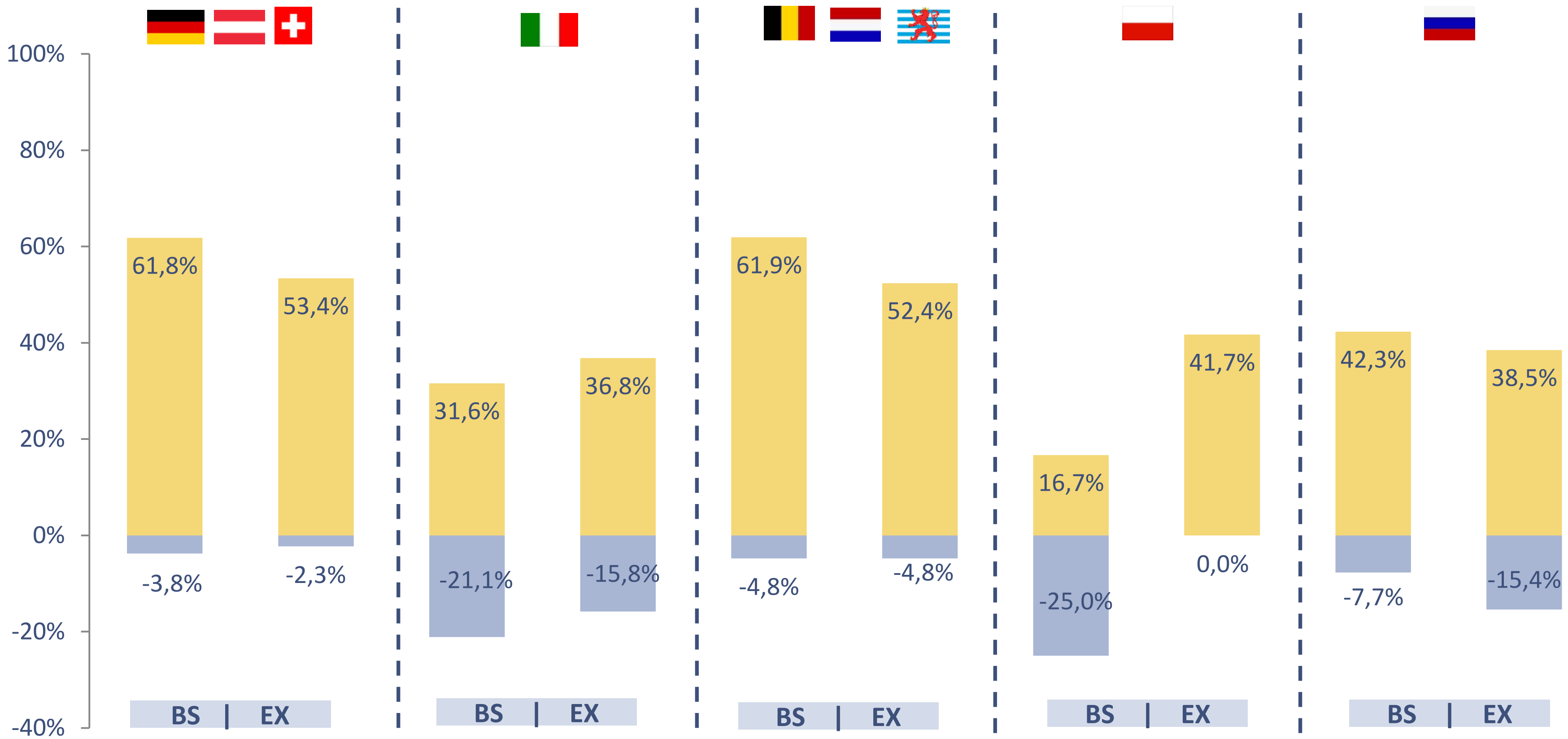


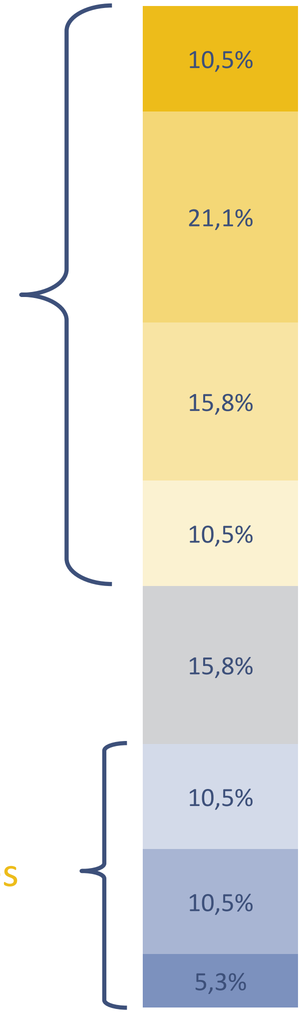
Fig. 4: DBCI September | October 2014 „Business Situation and Expectations Europe“
**) BS: Business Situation; EX: Expectations*

First semester 2014 revenues have grown in comparison to 2013

"The revenues in the first half year 2014 have … in comparison to the revenues of the same period in the previous year."

57,9% of all polled companies could generate in parts a clear increase in revenues in the first half year term in 2014 compared to the same period in the previous year

Only 26,3% 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. 5: DBCI September/October 2014 "revenues H1 2013-2014", n=19

Increase in revenues expected for the full year 2014

"The revenues in 2014 will … compared to the revenues in 2013."

63,1% of all polled companies are expecting a healthy growth in revenues for the year 2014 compared with the previous year

Only 21,1% of all polled companies expect a decrease in revenues compared to the pervious year

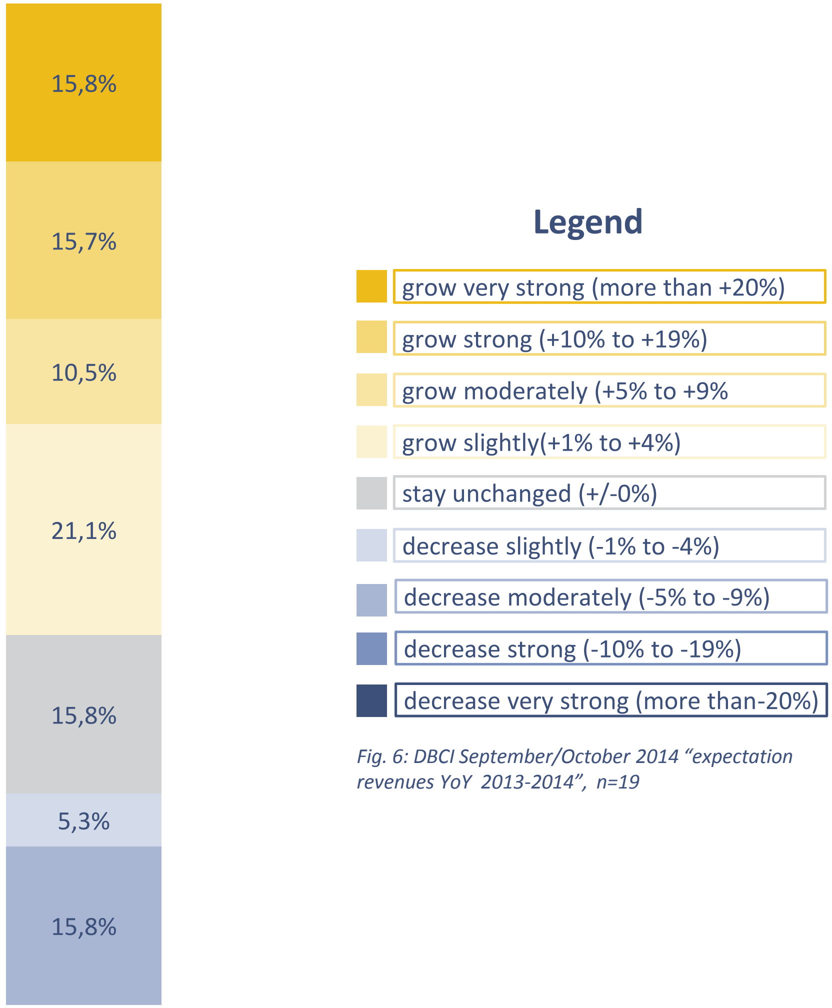
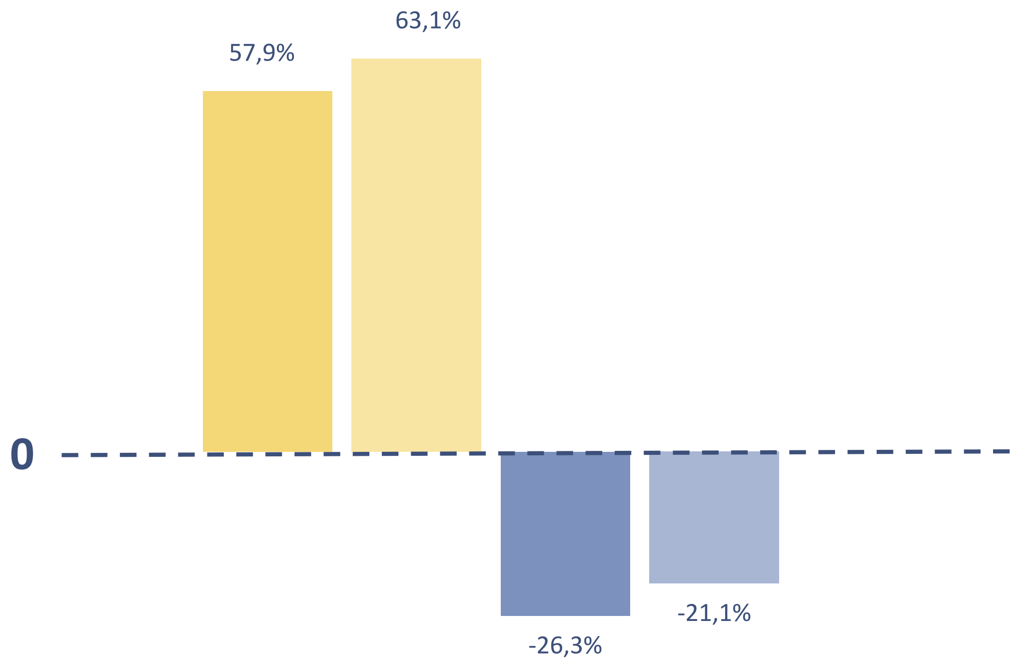


Fig. 6: DBCI September/October 2014 "expectation revenues YoY 2013-2014", n=19

H1 losses expected to be partially contained in H2



Percentage of polled companies which have registered a growth respectively a decline in revenues in H1 2014, compared to the same period in the previous year

- YoY H1 2013-2014 growth
- YoY 2013-2014 growth expected
- YoY H1 2013-2014 decrease
- YoY 2013-2014 decrease expected

Fig. 7: DBCI September/October 2014 "revenues YoY H1 2013-2014 and YoY 2013-2014", n=19

- Almost 60% of the polled companies in Italy expect to have a growth in revenues in 2014 compared to 2013
- Still 26% of all polled companies had to accept a decline in revenues in the first six months of 2014. However many of those companies are expecting to have balance 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

Growth in H1 revenues and full year expected revenues in Europe

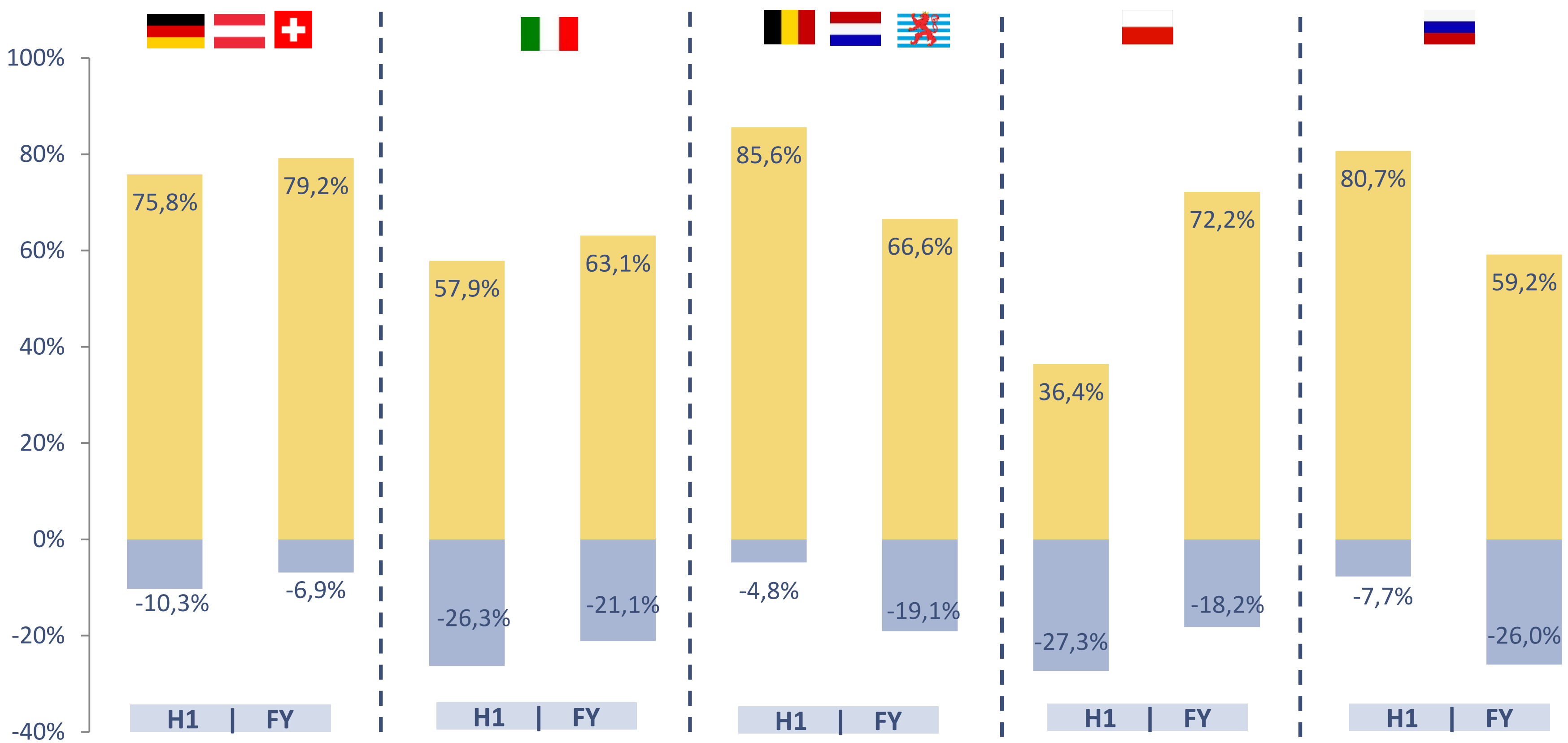


Fig. 8: DBCI September | October 2014 „Revenues H1 & FY Europe"
**) H1: First semester/half year period; FY: Full year*

DBCI | Roadmap 2014 & Contact

2014	
January	
February	
March	
April	
May	
June	
July	
August	
September	
October	
November	**Nov./Dec. | 24. 11.**
December	

- The next survey will take place in calendar week 45-46 of 2014
- The next planned publication date will be the 24th of November 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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