Italy

September | October 2015

DBCI

OVAB 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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2015 IT 500 en

Digital Signage market business sentiment expects an end-of-year rally

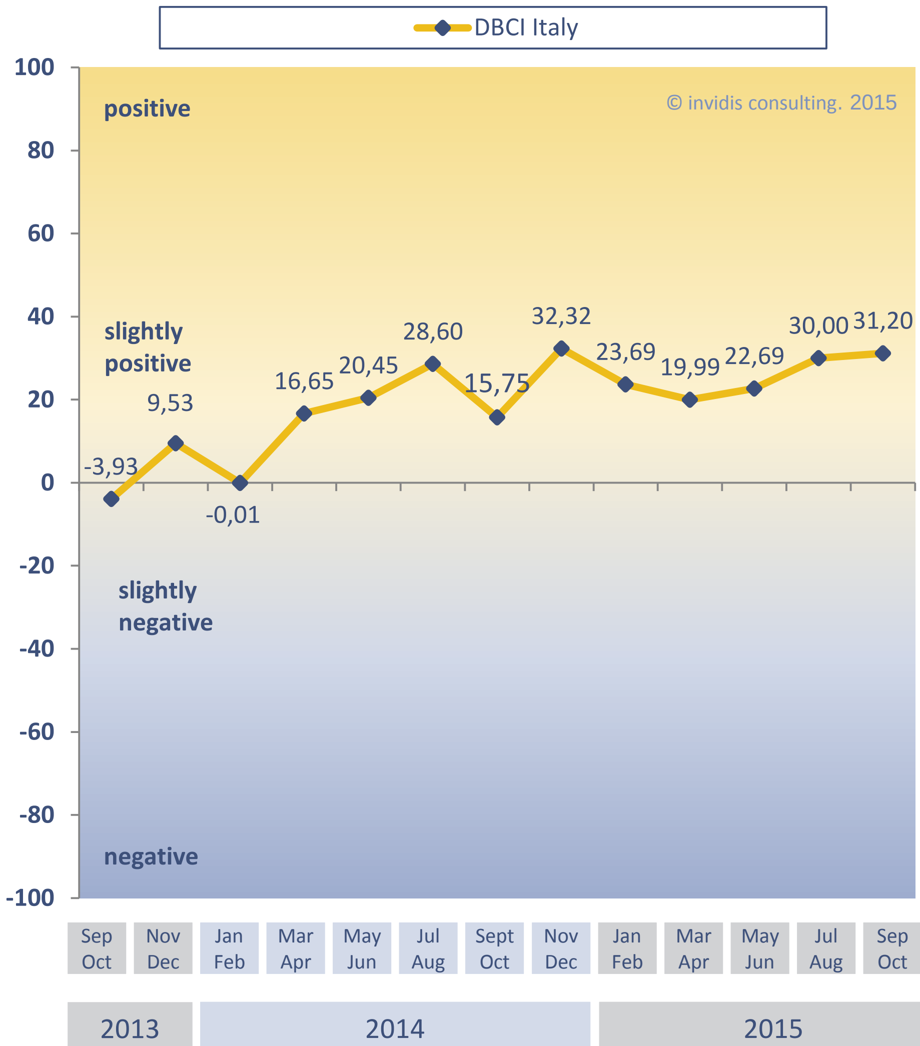


Fig. 1: DBCI Italy September | October 2015 „Index ", n=16

- The Digital Signage Business Climate Index (DBCI) in Italy has increased since the last poll in August. The Index grew from 30,00 base points by 1,20 points to reach 31,20 base points.
- The current business situation remains difficult in Italy. Many of the polled companies are satisfied, however also the negative sentiment has increased by 20%.
- In turn the optimism towards the near future saw an very strong growth by almost 30%. As 75% of all polled companies expect a *more favourable* situation for their business within the next six months.

Further research:

- Almost 70% of the polled companies in Italy expect to have a growth in revenues in 2015 compared to 2014
- Still 42,8% of all polled companies had to accept a decline in revenues in the first six months of 2015. However, most of those companies are expecting to have balance the losses at the end of the year

Participants: n=16; Region: IT; Survey Period: 2015 calendar weeks 36-37

Status Quo | Companies see a robust current business situation

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

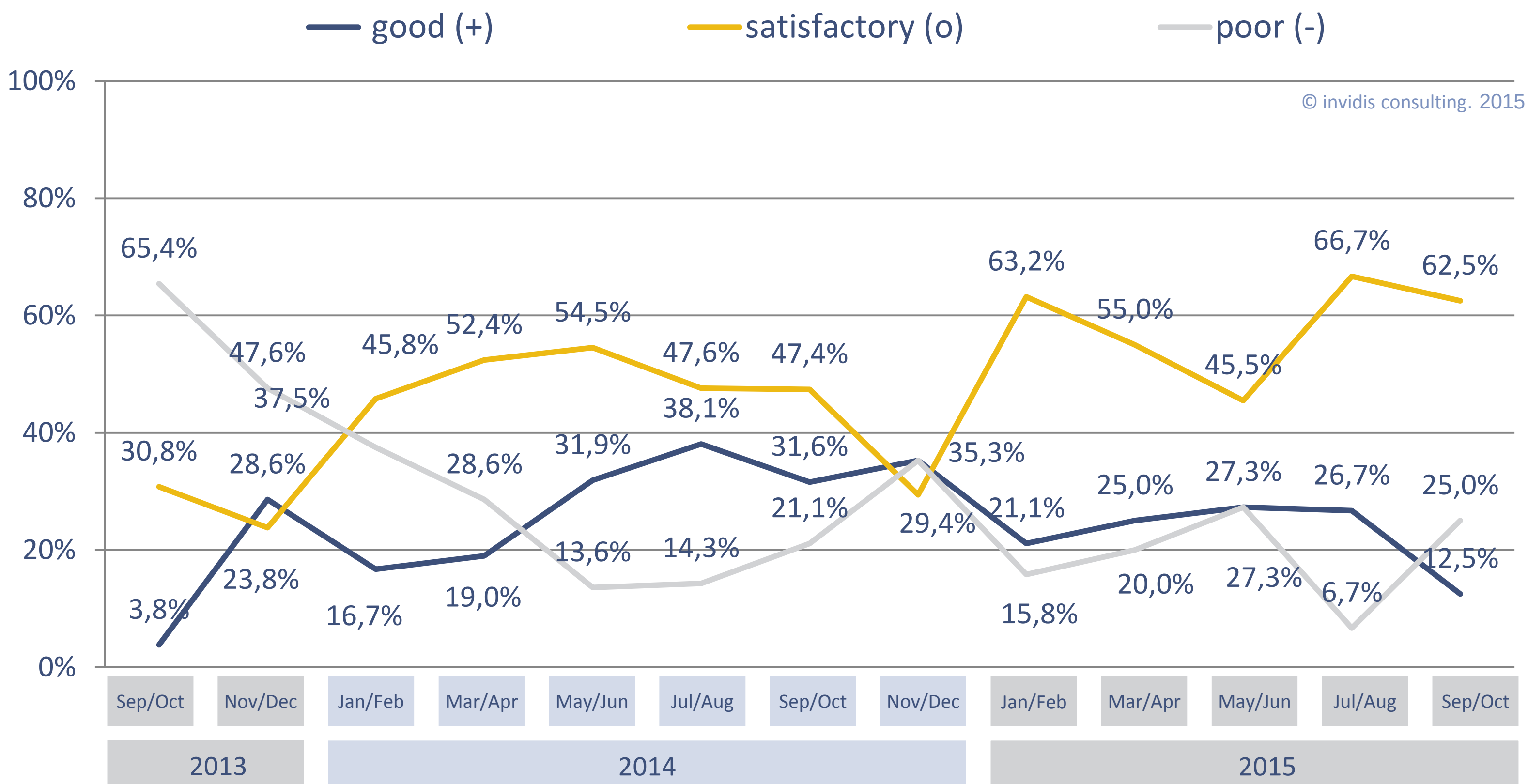


Fig. 2: DBCI Italia September | October 2015 "business situation" , n=16

Expectations | Slightly more conservative outlook for the next six months

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

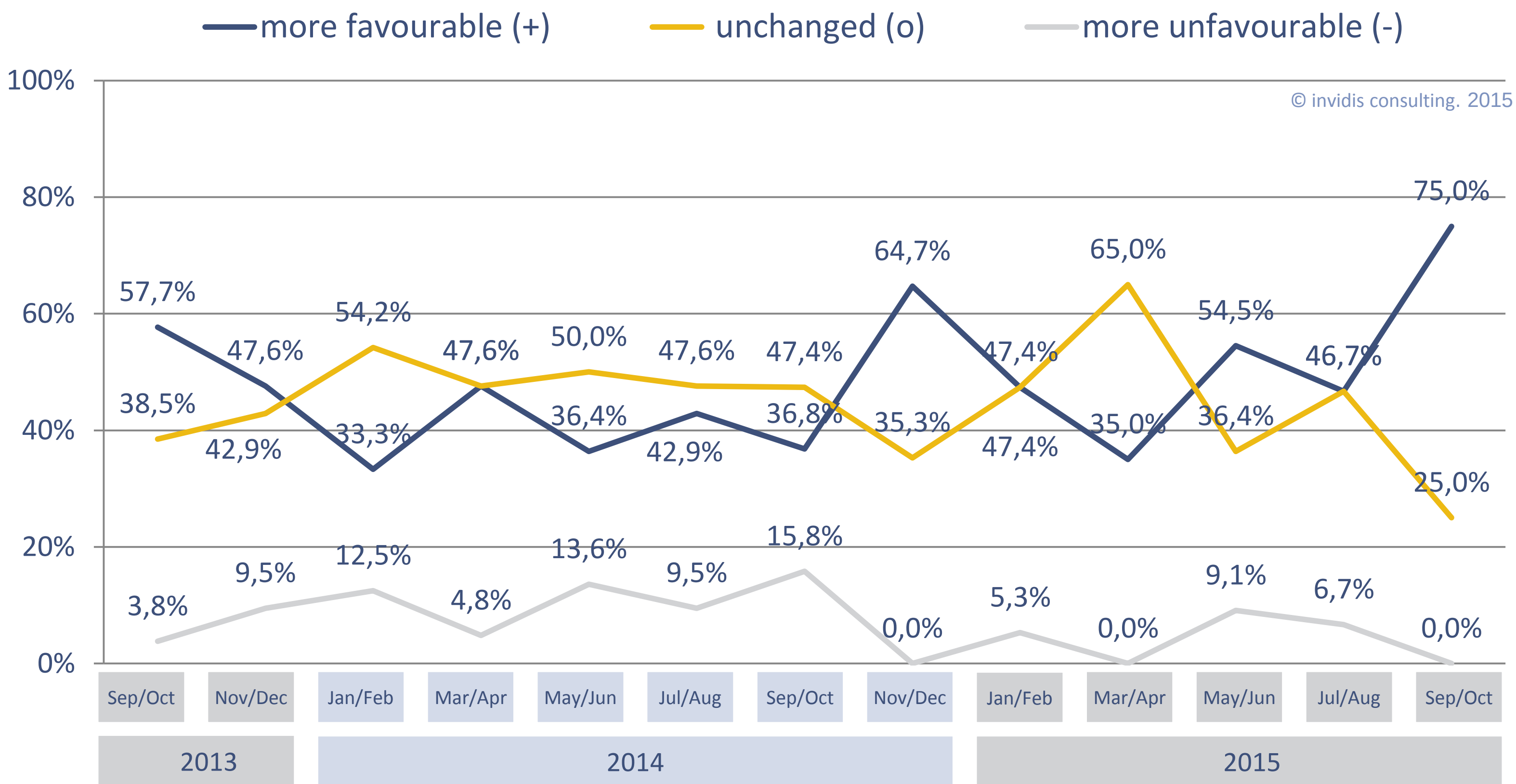


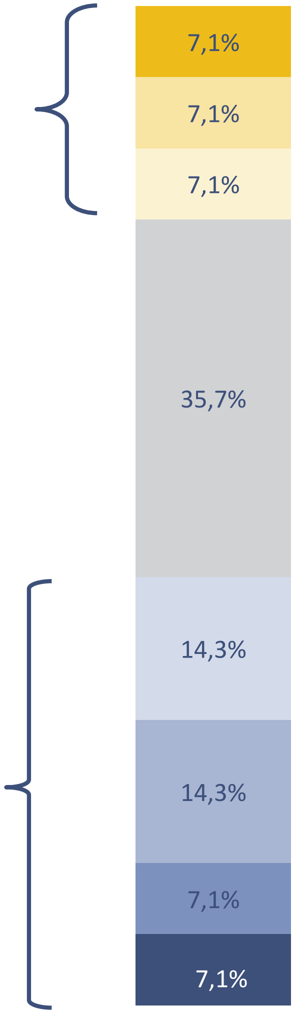
Fig. 3: DBCI Italia September | October 2015 "business expectations" , n=22

Further research| First semester 2015 with only marginally higher revenues than 2014

21,3% of all polled companies could generate in parts a clear increase in revenues in the first half year term in 2015 compared to the same period in the previous year

"The revenues in the first half year 2015 have … in comparison to the revenues of the same period in the previous year."

42,8% 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%)

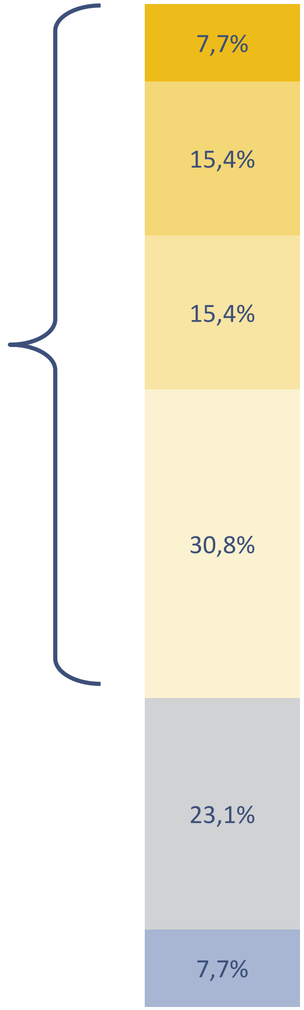
Fig. 4: DBCI IT September/October 2015 "revenues H1 2014-2015", n=14

Further research | Healthy increase in revenues expected for the full year 2015

"The revenues in 2015 will … compared to the revenues in 2014."

69,3% of all polled companies are expecting a healthy growth in revenues for the year 2015 compared with the previous year

Only 7,7% of all polled companies expect a decrease in revenues compared to the pervious year

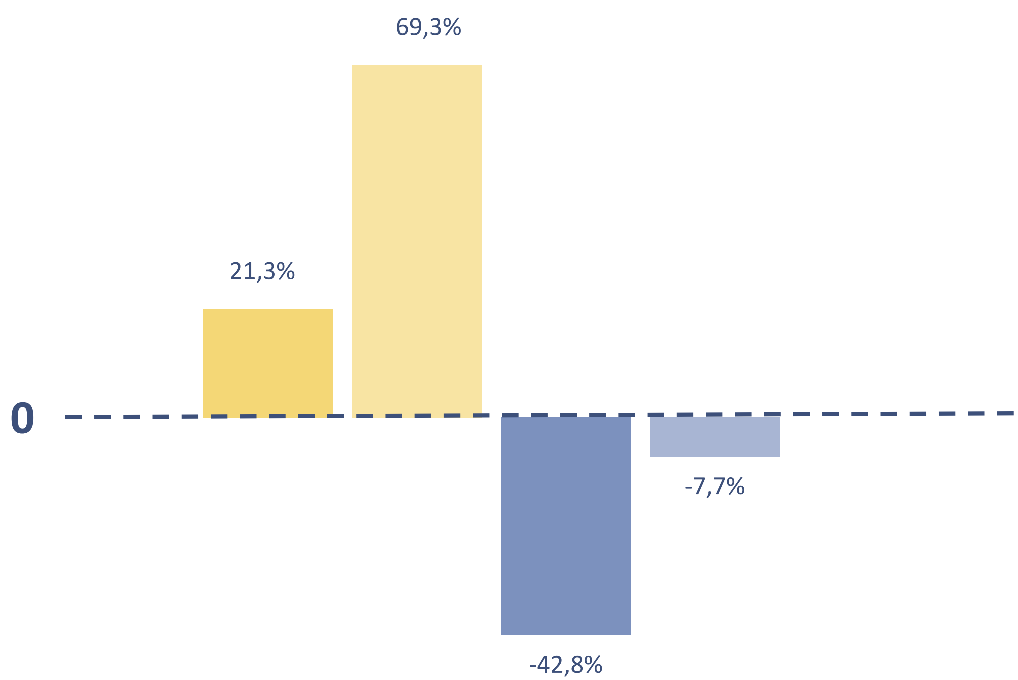


Legend

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

Fig. 5: DBCI IT September/October 2015 "expectation revenues YoY 2014-2015", n=14

Further research | Losses from the first semester expected to be contained



Percentage of polled companies which have registered a growth respectively a decline in revenues in H1 2015, compared to the same period in the previous year

- YoY H1 2014-2015 growth
- YoY 2014-2015 growth expected
- YoY H1 2014-2015 decrease
- YoY 2014-2015 decrease expected

Fig. 6: DBCI IT September/October 2015 "revenues YoY H1 2014-2015 and YoY 2014-2015", n=14

- Almost 70% of the polled companies in Italy expect to have a growth in revenues in 2015 compared to 2014
- Still 42,8% of all polled companies had to accept a decline in revenues in the first six months of 2015. However most 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

DBCI | Roadmap 2015 & Contact

2015
January
February
March
April
May
June
July
August
September
October
November
December

Nov./Dec. | 2015/12/07

- The next survey will take place in calendar week 45-46 of 2015
- The next planned publication date will be the 7th of December 2015
- 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 2015. For further information please contact Daniel Russell

Contact

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