

Italy

January | February 2016

**DBCI**

The pulse of the Digital Signage  
and DooH industry

**OVAB** Digital Signage & DooH  
Business Climate Index

OVAB-cooperation partner Italy:

**ASSODS**  
Associazione operatori Digital Signage

 **DIGITAL SIGNAGE  
SUMMIT @ISE**

invidis research  
2016 IT 100 en

  
**invidis**  
CONSULTING



## Digital Signage market business with robust sentiment at the start of the year



- The Digital Signage Business Climate Index (DBCI) in Italy has decreased since the last poll in November. The Index fell from 48,24 base points by 12,30 points to reach 35,94 base points. After the positive peak late last year the DBCI has again trailed away and saw a correction by -25% in January 2016. However, encouraging is the overall increase by 51% of the business sentiment in the year-on-year comparison with January 2015. Particularly the Expo 2015 in Milano gave the market a positive impuls.
- The current business situation is more conservative, as now over 56% of the polled companies are satisfied. Also the optimism towards the near future saw a slight decline. Still 64% of all polled companies expect a *more favourable* situation for their business within the next six months.
- The market participants have again criticised the bureaucratic and legal restrictions for the Digital Signage in Italy. The industry is also confronted with a comparably high number of unprofessional service providers and hardware of low quality.
- Technology trends are outdoor displays (LED/LCD), content and software in HTML5 and interactive signage solutions.

change **DBCI 2016 #1**

year-on-year **+51,7%**

previous survey **-25,5%**

Fig. 1: DBCI Italy January | February 2016 „Index“, n=32

Participants: n=32; Region: IT; Survey Period: 2016 calendar weeks 2-3



# Italy | Current business situation & outlook more conservative

Current business Situation | Italy | January/February 2016

Expectations | Italy | January/February 2016

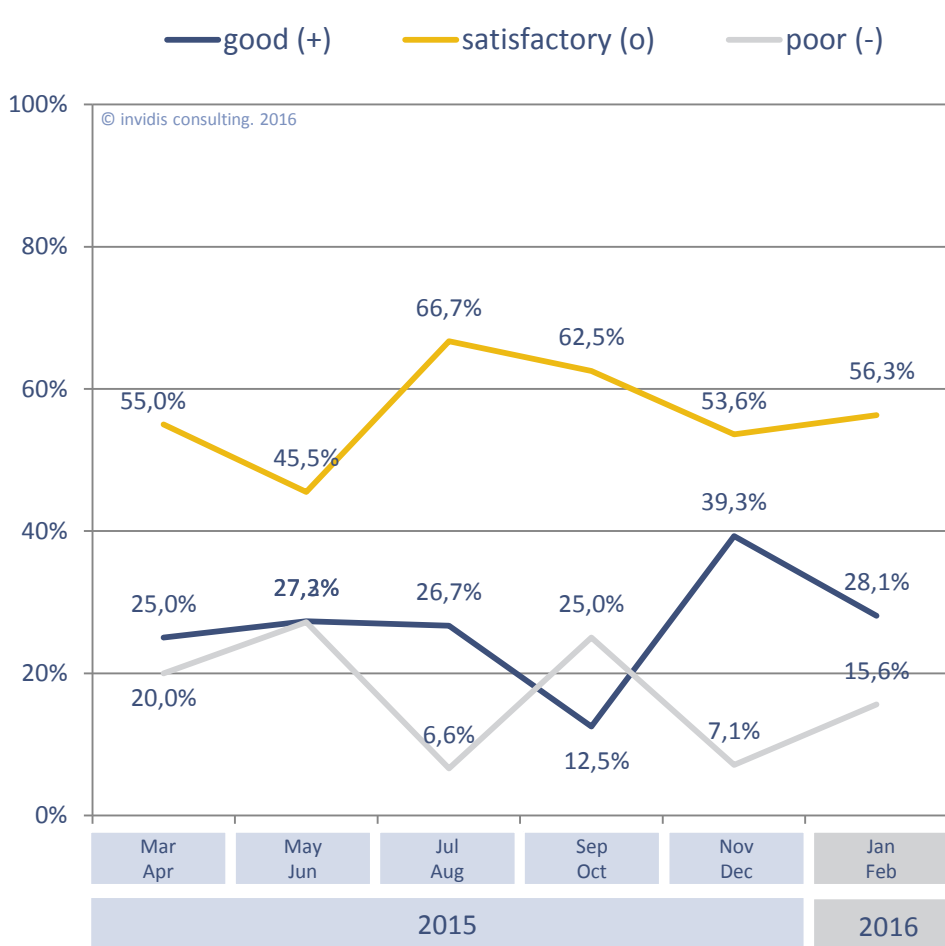


Fig. 2: DBCI Italy January | February 2016 „Business Situation“ rolling 12 months, n=32

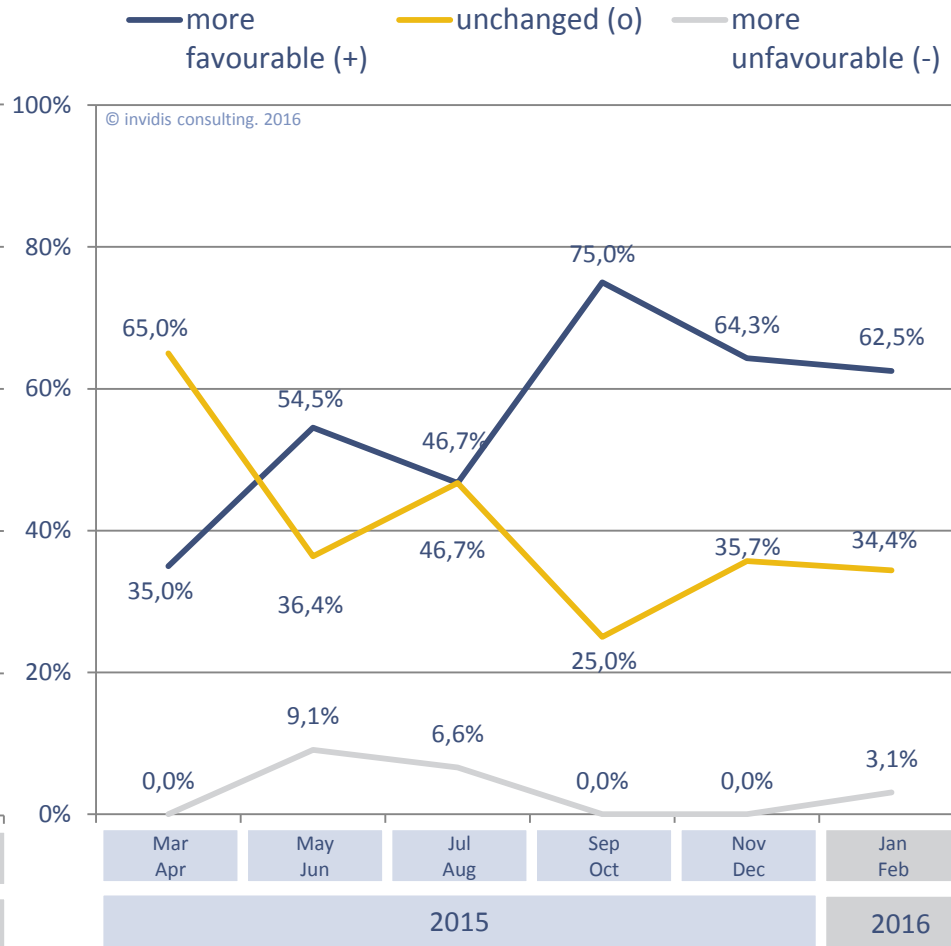


Fig. 3: DBCI Italy January | February 2016 „Expectations“ rolling 12 months, n=32



## Hirings 2015 | Digital Signage creates many new jobs

- **77,8%** of all companies in the Digital Signage Market have hired new staff in the last year.
- In 2015 **up to 100 new jobs** were created in the Digital Signage market in Italy.
- Now this unbroken positive trend in the IT industry overall has developed in a definite shortage of qualified personal. Companies are more and more concerned, how they can match recruiting with their growth strategy.
- As a whole there is a high demand for qualified personnel. Due to the digital transformation and the increasing integration of digital technologies the demand for personnel on a management level with new qualifications is very high (e.g. key account and project manager).
- The increasing expansion in vertical markets leads to a demand for more professionals from different industry branches by Digital Signage companies.

Company growth in new jobs created 2015

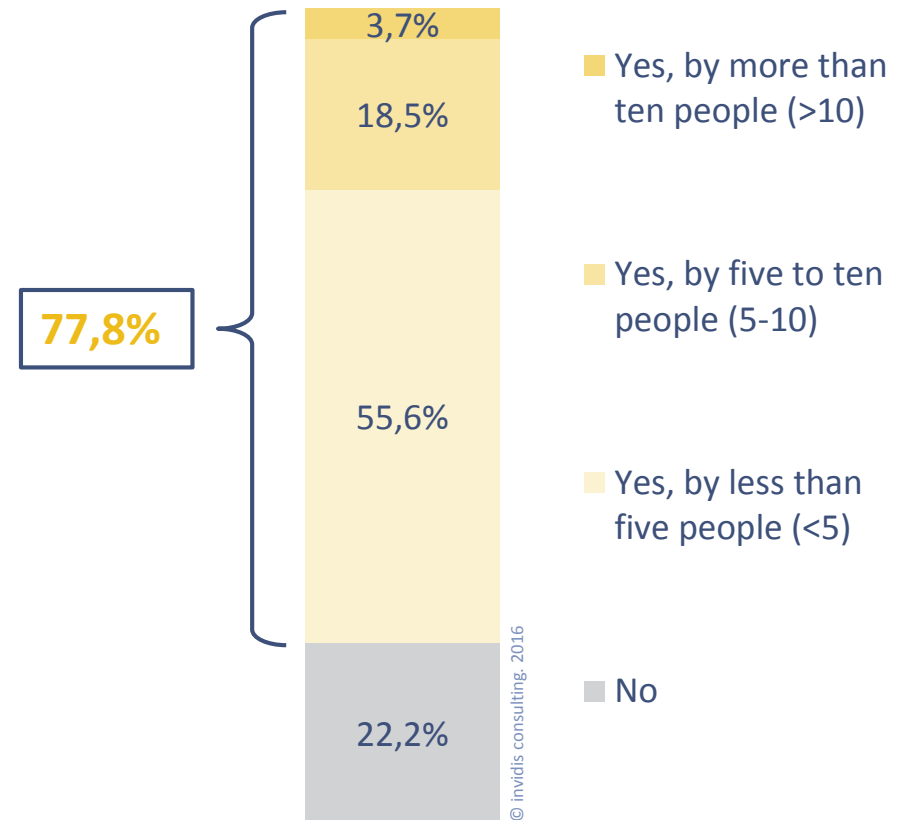


Fig. 4: DBCI Benelux January/February 2016 "Hirings 2015", n=70



## Roadmap 2016 & Contact

2016	
January	
February	
March	← DBCI Mar./Apr.   WN14
April	
May	← DBCI May./Jun.   WN23
June	
July	← DBCI Jul./Aug.   WN32
August	
September	← DBCI Sep./Oct.   WN41
October	
November	← DBCI Nov./Dec.   WN50
December	

- The next survey will take place in calendar weeks 12-13
- The next planned publication date will be in week 15
- 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 2016. For further information please contact Daniel Russell.

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## DSS | The Digital Signage Summit series

**DIGITAL SIGNAGE  
SUMMIT @ISE**

- «Digital Signage Summit» new brand for event series
  - ❖ DSS Europe: 23-24 June 2016
  - ❖ DSS MENA: 19-20 Sep 2016
  - ❖ DSS Russia: 1-2 Nov 2016

**DIGITAL SIGNAGE  
SUMMIT EUROPE**

- DSS is a dedicated confex event platform - conference and exhibition - featuring digital signage and DooH topics

**DIGITAL SIGNAGE  
SUMMIT RUSSIA**

- 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

**DIGITAL SIGNAGE  
SUMMIT MENA**

- All events also have a dedicated exhibition space for product presentation and networking opportunities

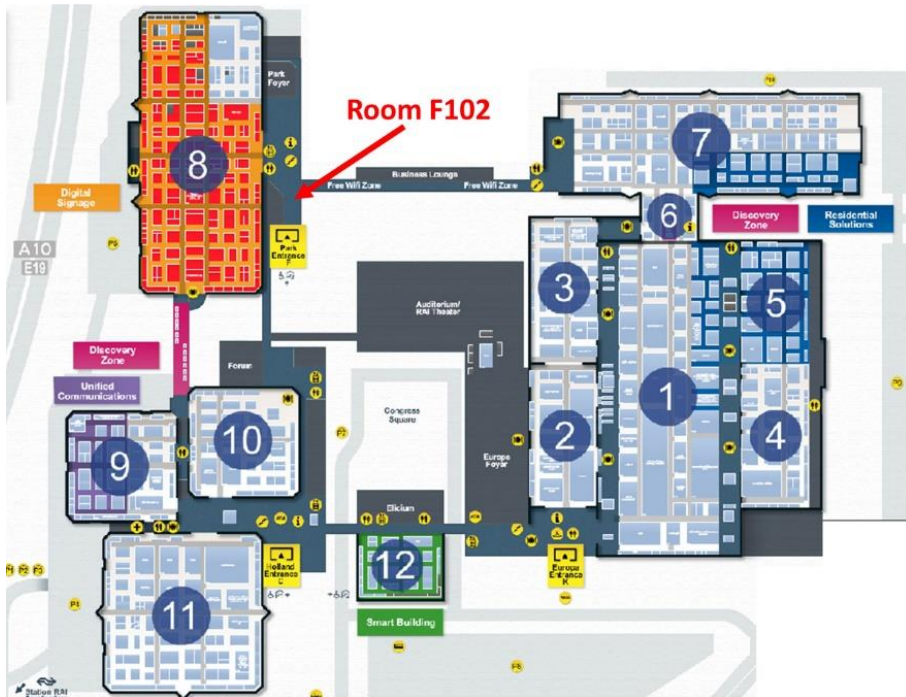




# DSS | Digital Signage Summit Kick-off Sessions @ ISE 2016

## DSS Kick-off Sessions @ ISE 2016

**Integrated Systems Europe**  
9-12 February 2016  
Amsterdam, RAI, NL



- Together with the ISE and in cooperation with Digital Signage Summit Europe, invidis consulting will be present at [Integrated Systems Europe](http://Integrated Systems Europe 2016) 2016 (9 – 12 February 2016, Amsterdam) with several digital signage events.
- **ISE 2016 Presentations invidis consulting**  
Every Day at 12:00, Commercial Theatre Hall 8
- **Digital Signage Summit Market Briefings**  
Every Day at 14:00, Room F102
- **Digital Signage Summit Guided Tours**  
Every Day at 14:30, Room F102
- **More here:**  
[invidis.de/ise-2016-digital-signage-ise-program/](http://invidis.de/ise-2016-digital-signage-ise-program/)