

Italy

March | April
2016

DBCI

The pulse of the Digital Signage
and DooH industry



Digital Signage & DooH
Business Climate Index

OVAB-cooperation partner Italy:



**DIGITAL SIGNAGE
SUMMIT EUROPE**

23-24 June 2016, Munich, Germany

invidis research
2016 IT 200 en





Digital Signage market business sentiment continuous with negative trend

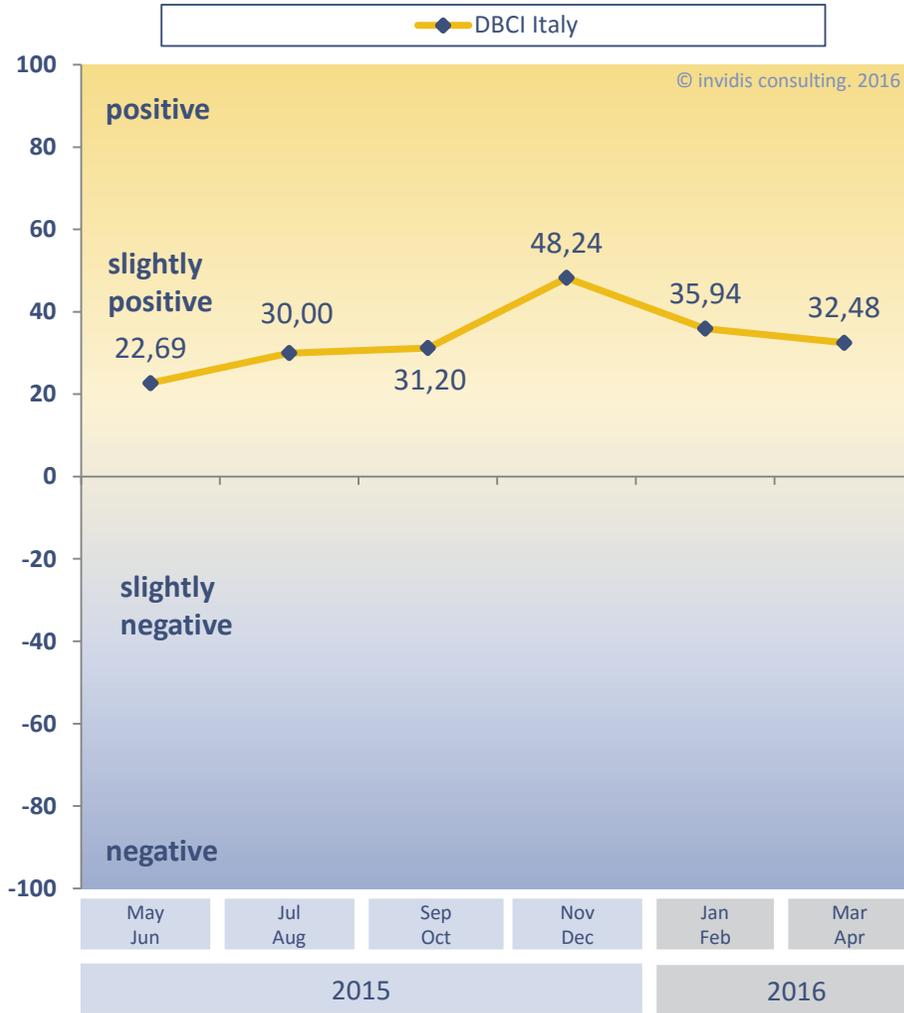


Fig. 1: DBCI Italy March | April 2016 „Index“, n=20

Participants: n=20; Region: IT; Survey Period: 2016 calendar weeks

- The Digital Signage Business Climate Index (DBCI) in Italy has decreased slightly since the last poll in January. The Index fell from 35,94 base points by 3,46 points to reach 32,48 base points.
- After the positive peak late last year the DBCI has continued to trail away and registered a decline by -9,6% in the first quarter 2016. However, encouraging is the overall increase by 62,5% of the business sentiment in the year-on-year comparison with 2015. Particularly the Expo 2015 in Milano gave the market a positive impulse.
- The current business situation is more negative, as now 25% of the polled companies are not satisfied. On the other hand, the optimism towards the near future remained strong as still 60% of all polled companies expect a *more favourable* situation for their business within the next six months.

change
DBCI 2016 #1

year-on-year

+62,5%

previous survey

-9,6%



Current business situation & outlook more conservative

Current business Situation | Italy | March/April 2016

Expectations | Italy | March/April 2016

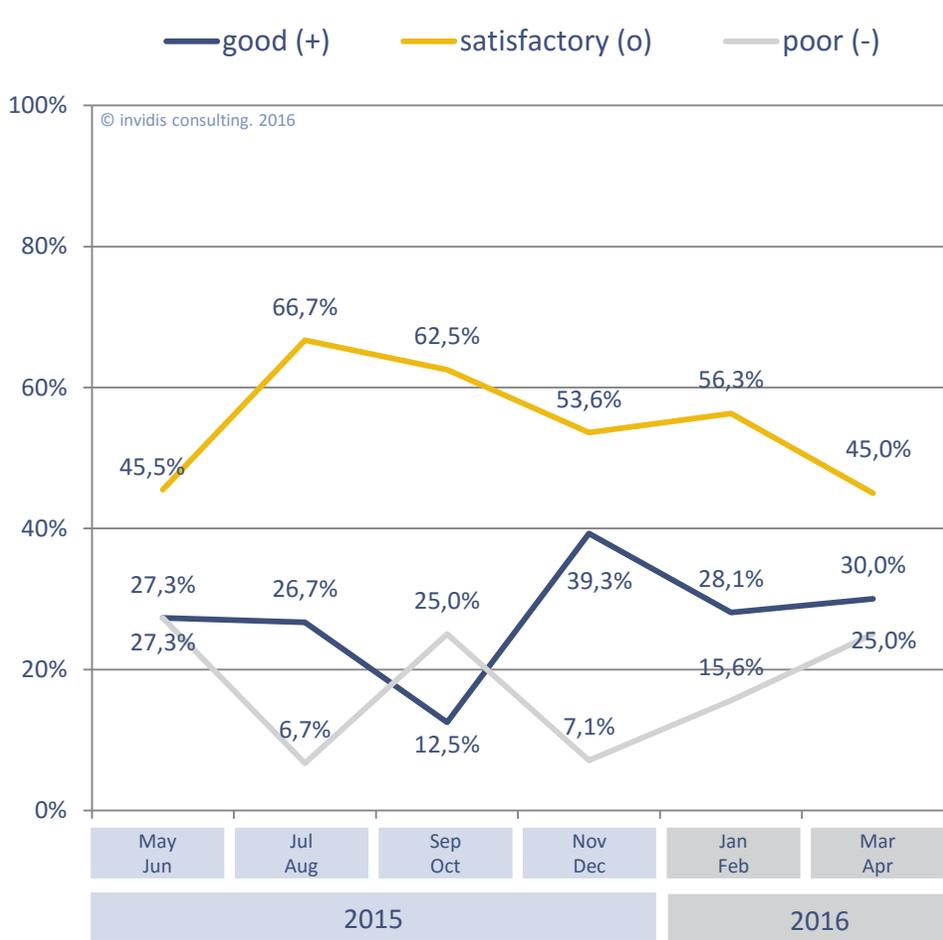


Fig. 2: DBCI Italy March | April 2016 „Business Situation“ rolling 12 months, n=20

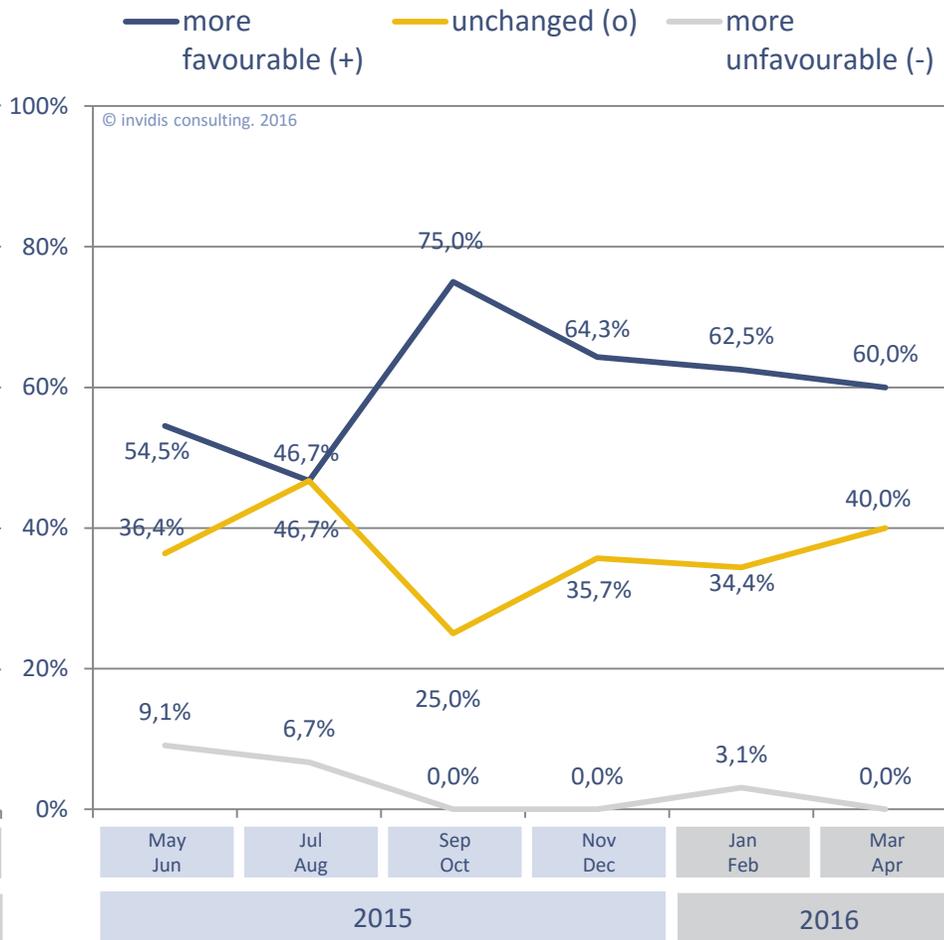


Fig. 3: DBCI Italy March | April 2016 „Expectations“ rolling 12 months, n=20

 Retail defends top spot, strong demand for Shopping Malls & Events

Question: We would like to assess the dynamic for Digital Signage in the different vertical markets. In which vertical markets has your company realised the most projects in 2015? Please rate the Top 3 vertical markets.

- Retail is with over one quarter 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.
- However, in the last year other vertical markets have become more important for the industry. Particularly, the shopping mall and Events/Exhibition segments registered a high dynamism in 2015. The Expo in Milano has given the events segment a big boost.
- Corporate communication is also a very interesting target market which has grown exponentially over the last few years. The digitization of employee communications is now seen as a sustainable investment by many companies.

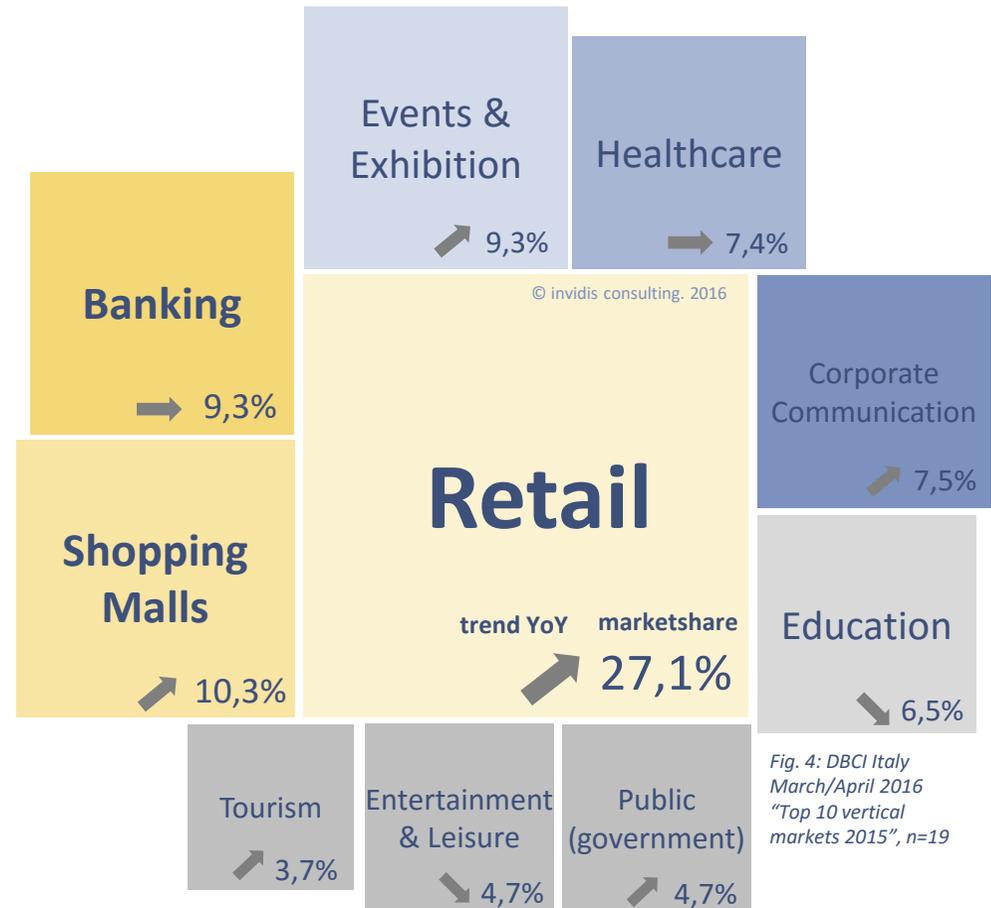


Fig. 4: DBCI Italy March/April 2016 "Top 10 vertical markets 2015", n=19

 Cross-media bundling & installation of new networks will drive DooH

Question: Which factors will primarily lead to an increasing market share of DooH?

- One of the most important drivers for Digital out of Home in Italy will be cross-media bundling for dynamic campaigns i.e. online video in the future. Almost 50% of all DooH market participants expect this development to give the industry the most positive impulse in the next years.
- The second main driver for DooH in the future will be the installation of new networks. This development has started already in the last year, as investments in DooH have markedly increased.
- Investments in existing networks will be less important and are increasingly shifted from installing new locations or displays to upgrading the existing technology (hardware / software).

Reasons for future DooH growth

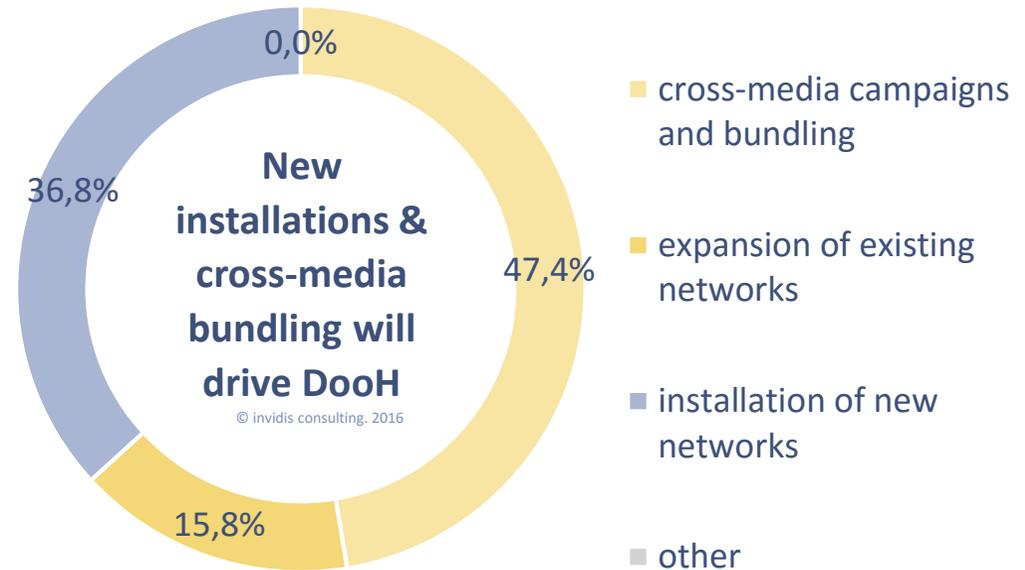


Fig. 5: DBCI Italy March | April 2016 "growth reasons DooH", n=19



Roadmap 2016 & Contact

2016
March
April
March
April
May
June
July
August
September
October
November
December

← **DBCI May./Jun. | WN23**

← **DBCI Jul./Aug. | WN32**

← **DBCI Sep./Oct. | WN41**

← **DBCI Nov./Dec. | WN50**

OVAB Europe will be rebranded as **Digital Signage Federation Europe** starting with the 1st April 2016

- The next survey will take place in calendar weeks 20-21
- The next planned publication date will be in week 23
- 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» new brand for event series
- DSS is a dedicated confex event platform - conference and exhibition - featuring digital signage and DooH topics
- 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
- All events also have a dedicated exhibition space for product presentation and networking opportunities

