

Italy

May | June 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**

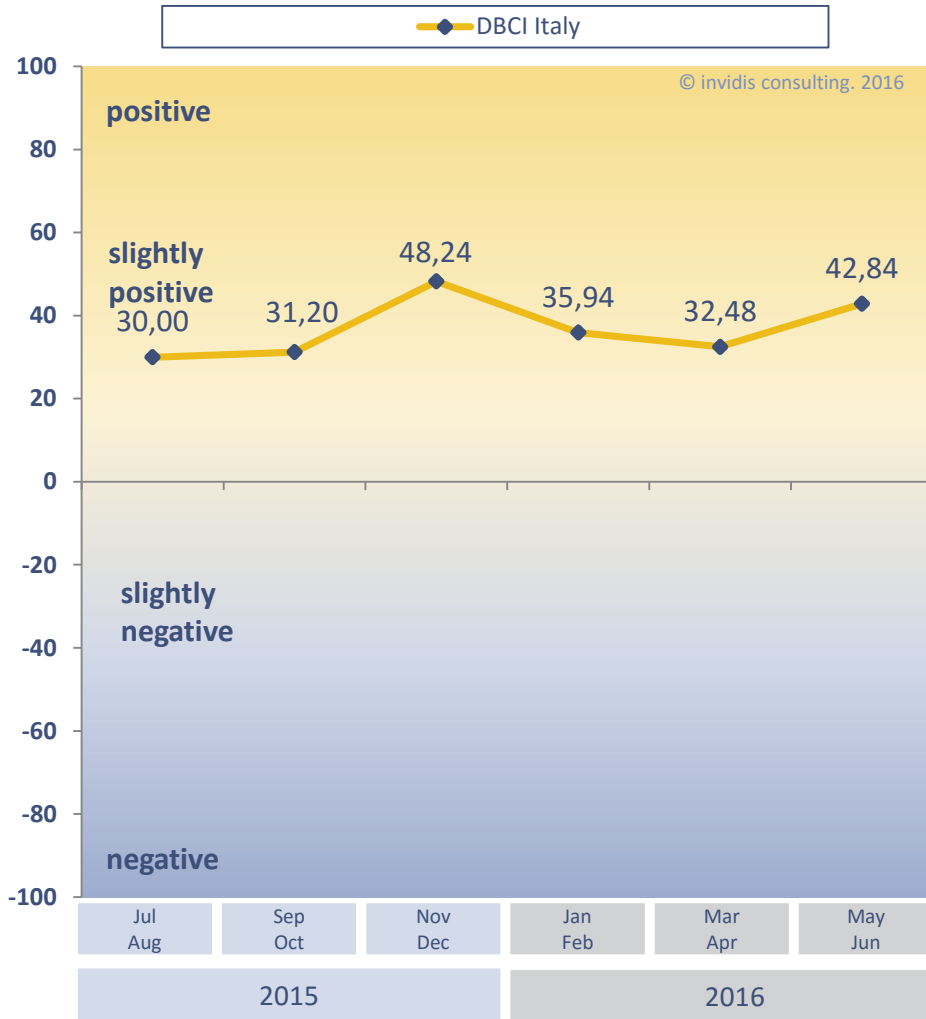
23-24 June 2016, Munich, Germany

invidis research
2016 IT 300 en





Digital Signage market business sentiment with positive dynamism in May



- The Digital Signage Business Climate Index (DBCI) in Italy has increased since the last poll in March. The Index grew from 32,48 base points by 10,36 points to reach 42,84 base points.
- After a slower start to the year the current business situation has again increased. The marked participants have registered growth in the positive and satisfactory assessment of the situation. Now over one third of the market sees the situation outright positive.
- Also the optimism towards the near future has increased. Now almost two thirds of all polled companies expect a *more favourable* situation for their business within the next six months.
- Ongoing economic consolidation with rising GDP growth fueled by a strengthened private consumption have increased the confidence in a sustainable development also for 2017.
- Most Digital Signage solutions have been reliant on Windows as OS in 2015. However Linux based solutions are increasingly implemented

Fig. 1: DBCI Italy May | June 2016 „Index“, n=14

Participants: n=14; Region: IT; Survey Period: 2016 calendar weeks 20-21

change
DBCI 2016 #3

year-on-year

+88,8%

previous survey

+31,9%



Positive business situation & outlook have increased

Current business Situation | Italy | May/June 2016

Expectations | Italy | May/June 2016

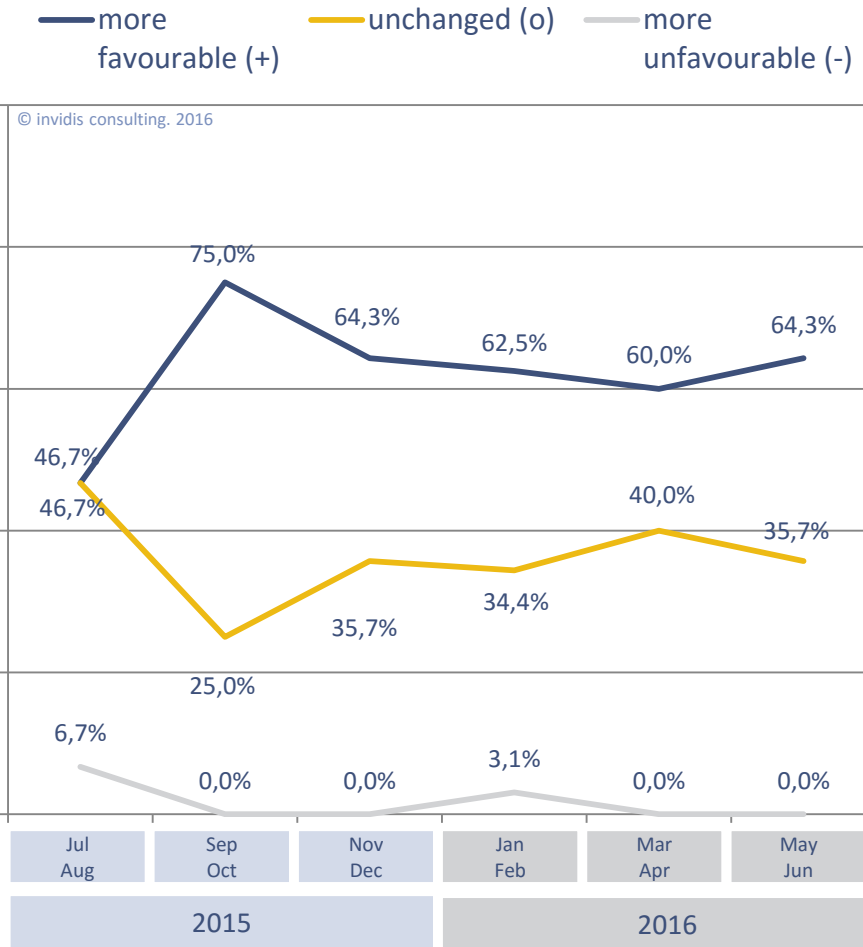
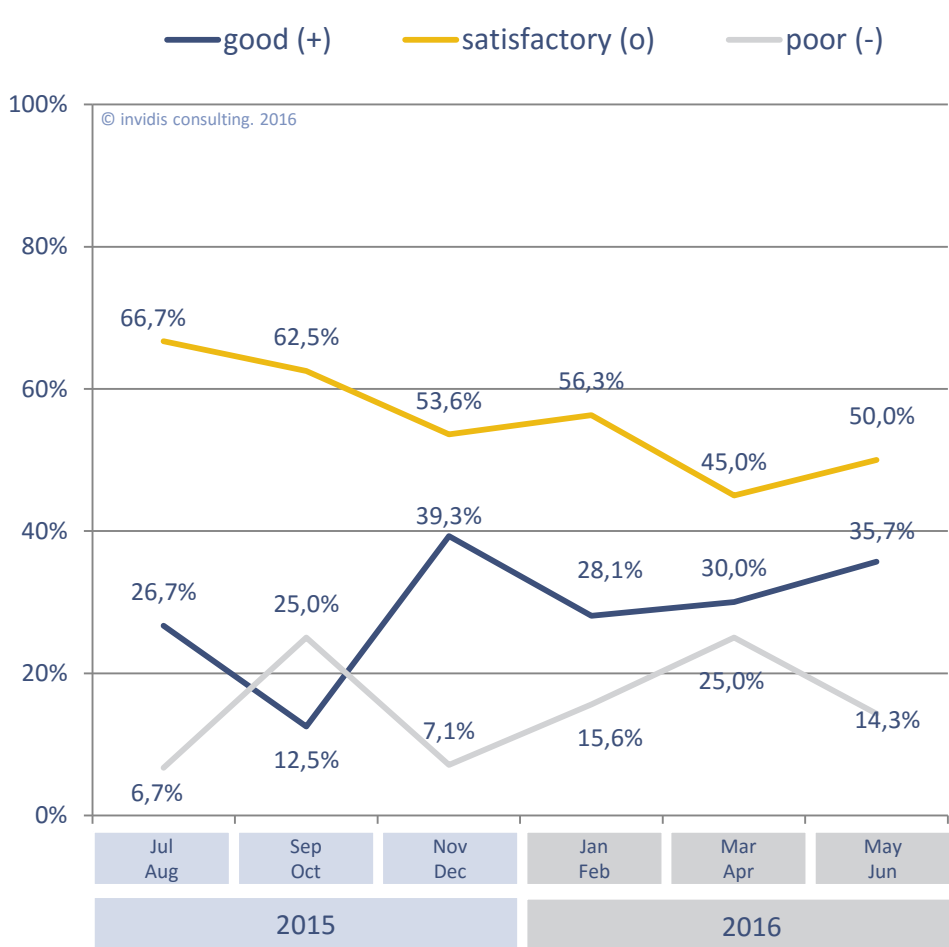


Fig. 2: DBCI Italy May | June 2016 „Business Situation“ rolling 12 months, n=14

Fig. 3: DBCI Italy May | June 2016 „Expectations“ rolling 12 months, n=14



Further research | Windows in first, Linux challenges & Android picks up speed

Question: How high was the percentage of operating systems used in Digital Signage Projects in 2015?

Windows is implemented most frequently with Digital Signage projects. However other operating systems have significantly gained ground in the last two years.

Particularly Linux based installations are becoming more and more popular. Here cost and security issues are dictating the decisions. With Digital Signage installations becoming more varied in size and required performance, the appliances running on a non-PC architecture like Raspberry Pi, Cisco, BrightSign, Spinetix etc. are more widely integrated.

Cost effective systems operating on Android or SoC basis currently have the highest dynamic in the market. Still many security and performance issues remain.

Apple operating systems could establish a robust nice segment. However, many managers with IT responsibility dismiss it as an operating system for Digital Signage installations.

Market share of IT operating systems in Digital Signage installations 2015

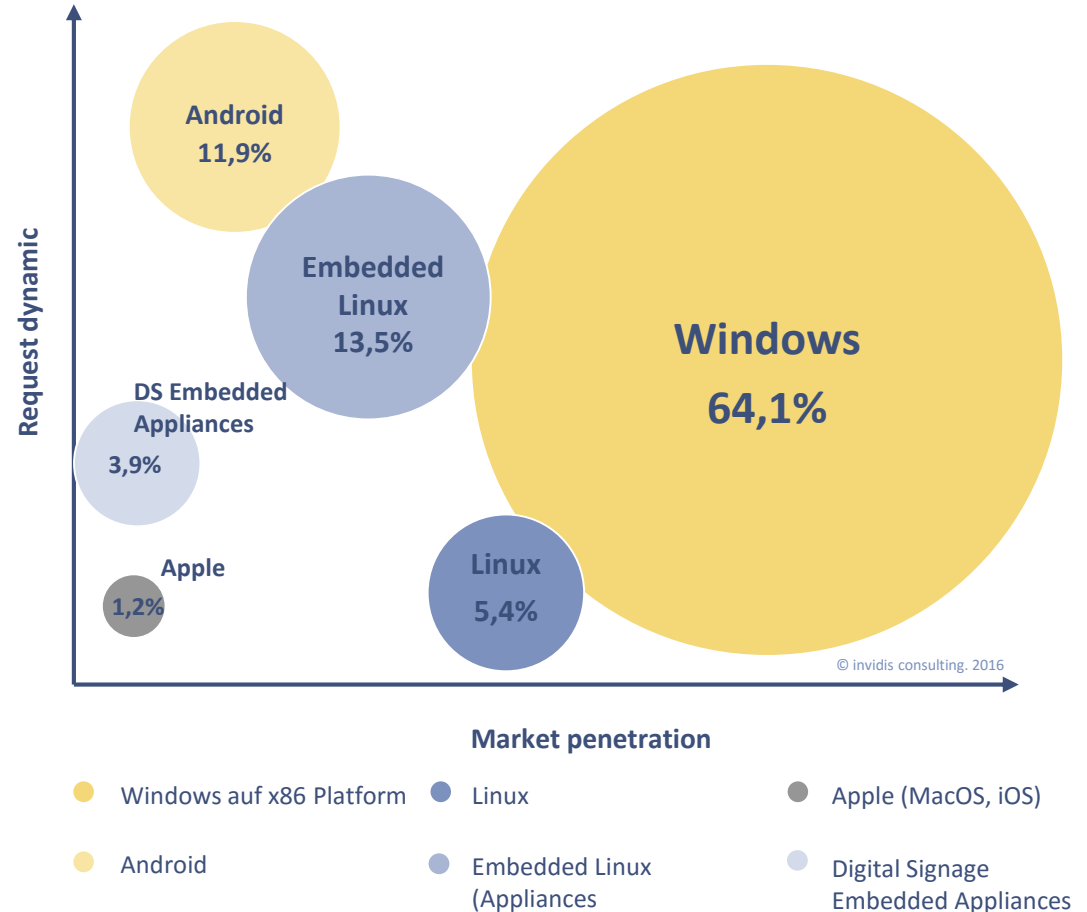


Fig. 4: DBCI IT May | June 2016 "operating systems 2015", n=14



Roadmap 2016 & Contact

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

← **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 30-31
- The next planned publication date will be in week 32
- The DBCI is polled by invidis consulting and published in cooperation with DSF 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.

Contact:

Daniel Russell | Research Analyst
invidis consulting GmbH
Rosenheimer Str. 145e
DE-81671 Munich
Daniel.Russell@invidis.com
Phone: +49 89 2000416-21
Mobile: +49 151 62438503



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

