

Mai/June 2014

Italy

26<sup>th</sup> of May 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



## Digital Signage market in slow upturn



Abb. 1: DBCI Mai/June2014 „Index Italy“, n=22

- The Digital Signage Business Climate Index (DBCI) in Italy has increased slightly since the last poll in January. The Index grew by 3,80 points and still remains in the “slightly positive” level
- The industry shows an increased satisfaction with the current business situation as 86,3% of all participants answered with “good” or “satisfactory”
- The expectations for the next six months are stable as almost 50% of all polled companies see the future “unchanged”
- Since the crises started 24 months ago the Digital Signage industry has come to a standstill in Italy. Many potential big customers are still very reluctant to take risks and invest in new media
- However the companies who are still in business are now profiting from the market exits of their competitors
- Also a continues sales increase of professional displays by approximately 10% in the last year suggest a slow upturn for the industry
- Most business is currently made with small installations in the SMB sector

### Survey facts

- Participants: n=22
- Region: Italy
- Time frame: 2014 calendar weeks 19 & 20



## Increased satisfaction with the business situation

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

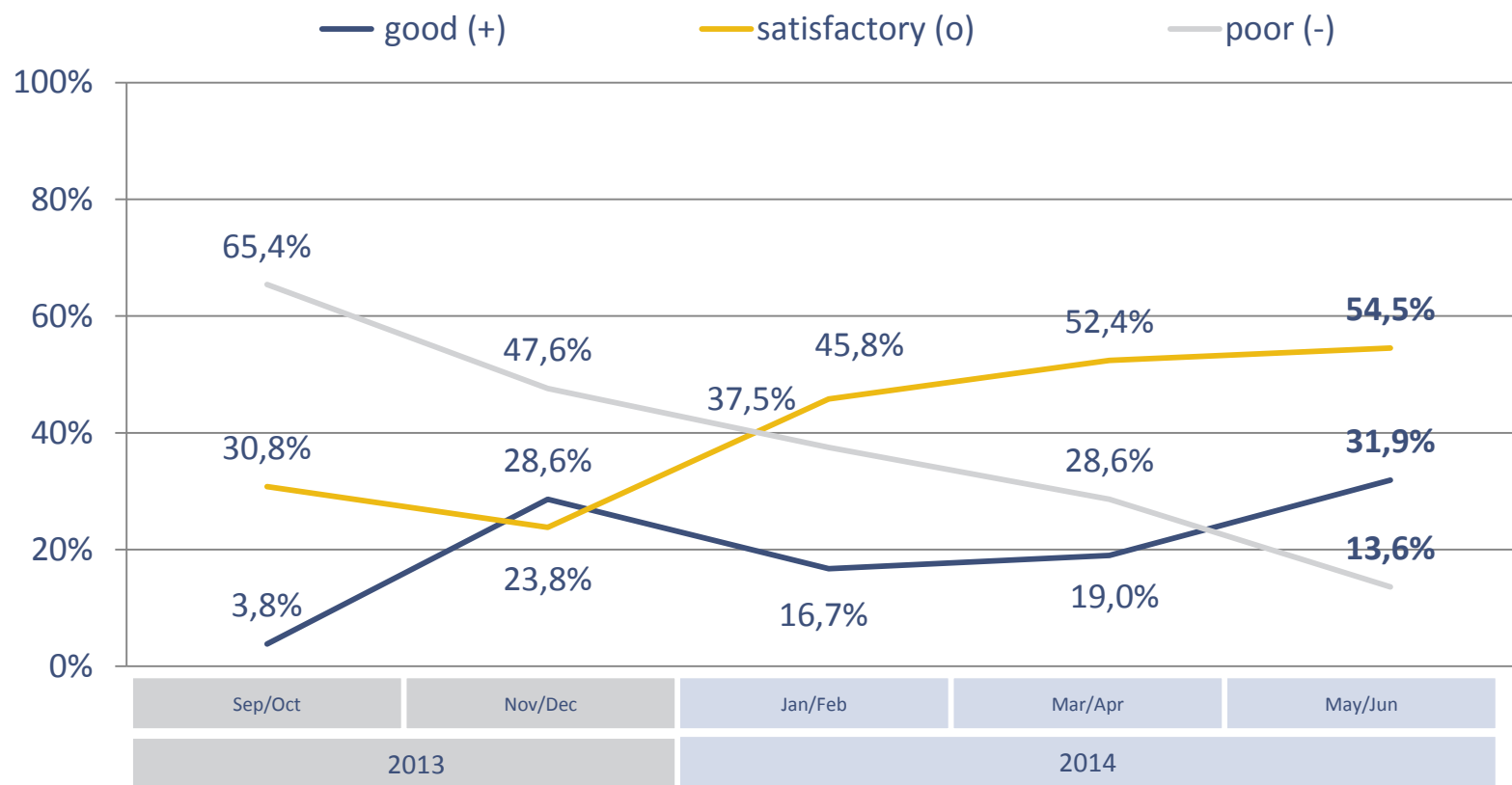


Fig. 2: DBCI Italia May/June 2014 "business situation", n=22



## Stable outlook for the second half-year of 2014

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

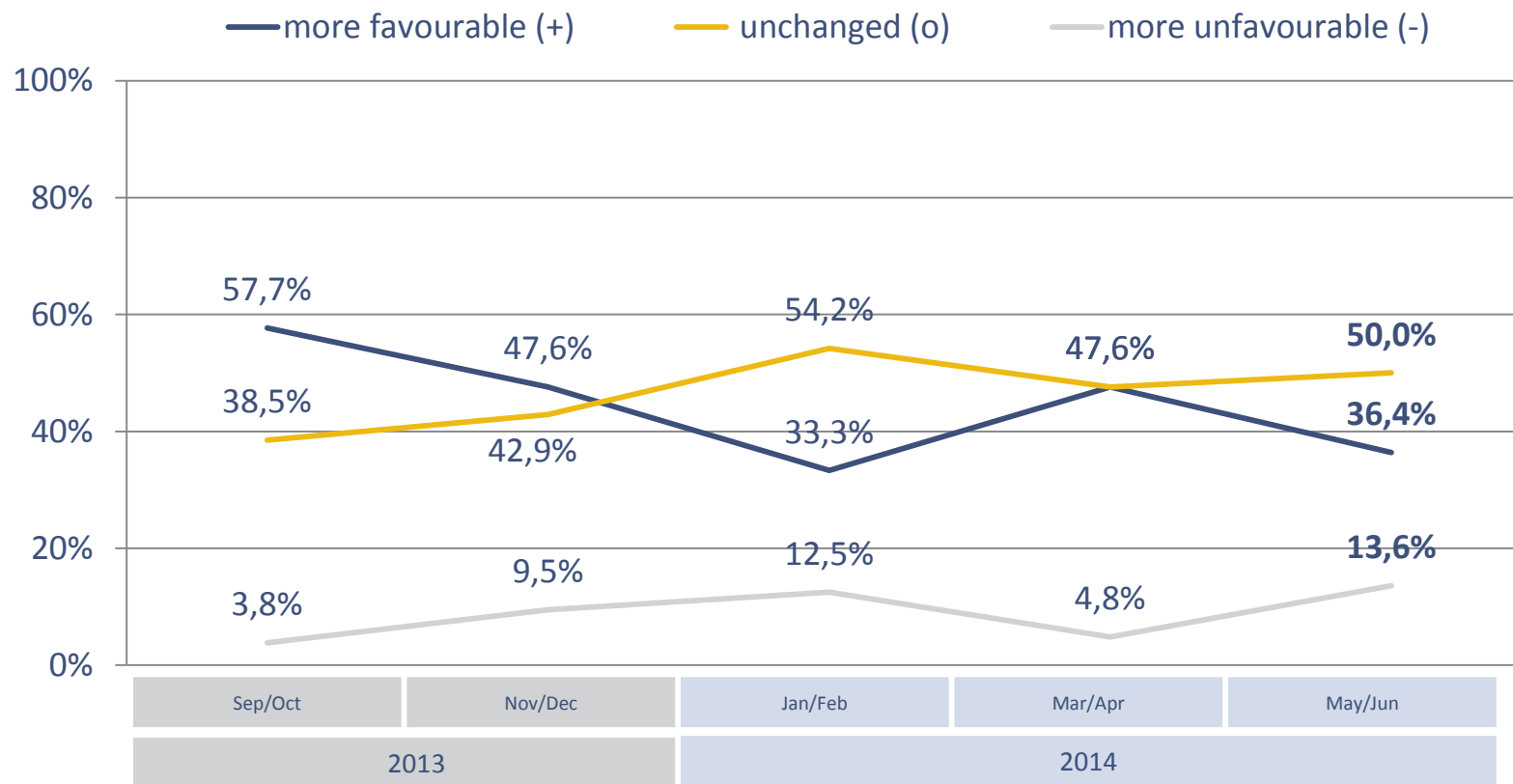


Fig. 2: DBCI Italia May/June 2014 "business situation", n=22



DBCI May/June 2014

# Additional Questions



## High expectations for the EXPO 2015 in Milano

**Question:** What you think may be incentives to increase the visibility of the digital signage and digital out of home in the Italian market?

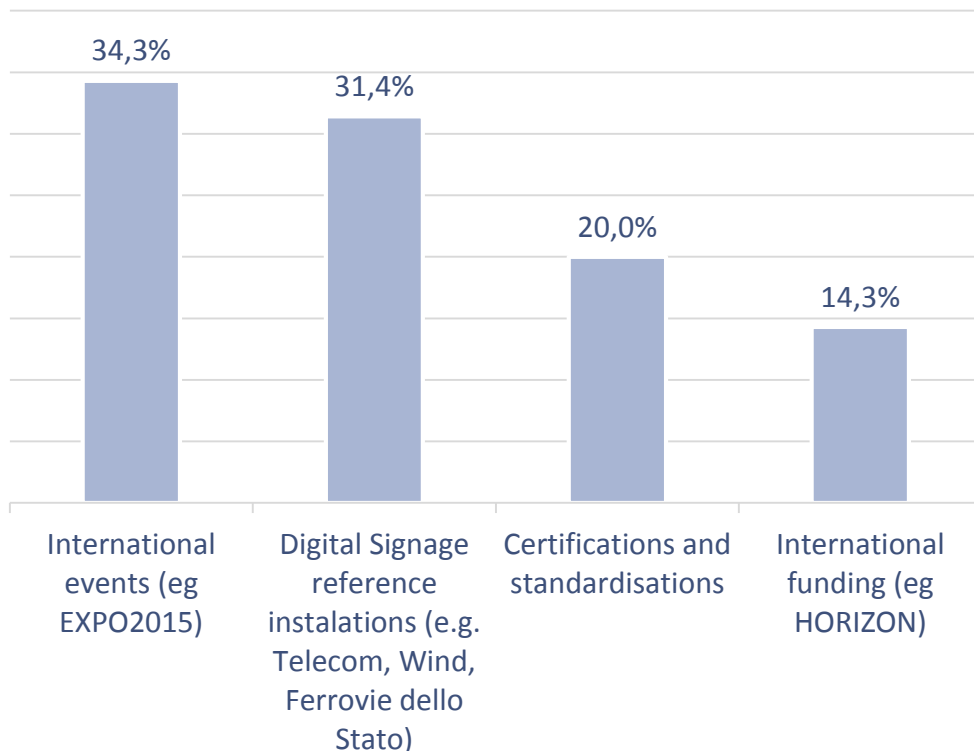


Fig. 4: DBCI Italia May/June 2014 "visibility incentives", n=35

- The participant in the Italian Digital Signage market have high expectations for the EXPO 2015 in Milano and for other reference installations
- The general notion in the industry is that Digital Signage needs more showcases and best practice examples from the local market to convince customers of the USPs
- Especially high hopes are brought forward concerning the EXPO 2015 as this is not only in itself a prestigious project with very good funding but also new infrastructure projects are planned, often including Digital Signage solutions



## Loud call for government support in the industry

**Question:** What steps initiated by the government would it require to support the industry?

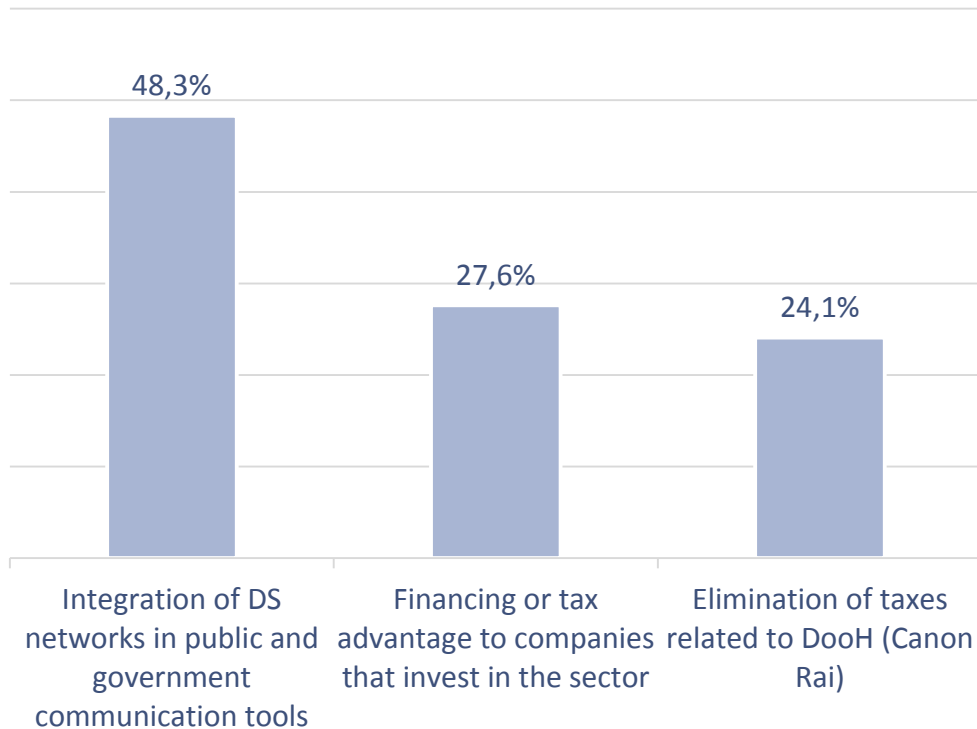


Fig. 5: DBCI Italia May/June 2014 "government support", n=29

- Almost 50% of all polled companies think that the integration of Digital Signage in the official recommended communication catalogue of the government could give a big boost to the industry
- If Digital Signage could manage to open up part of the 4% communal budget communication financing obligation a huge market would be created
- Other government measures favorite by the industry are tax advantages for Digital Signage customers as well as the elimination DooH related taxes



## Web research only medium impact on business contacts

**Question:** How high is the impact of social media (Facebook, LinkedIn) and google in your business research?

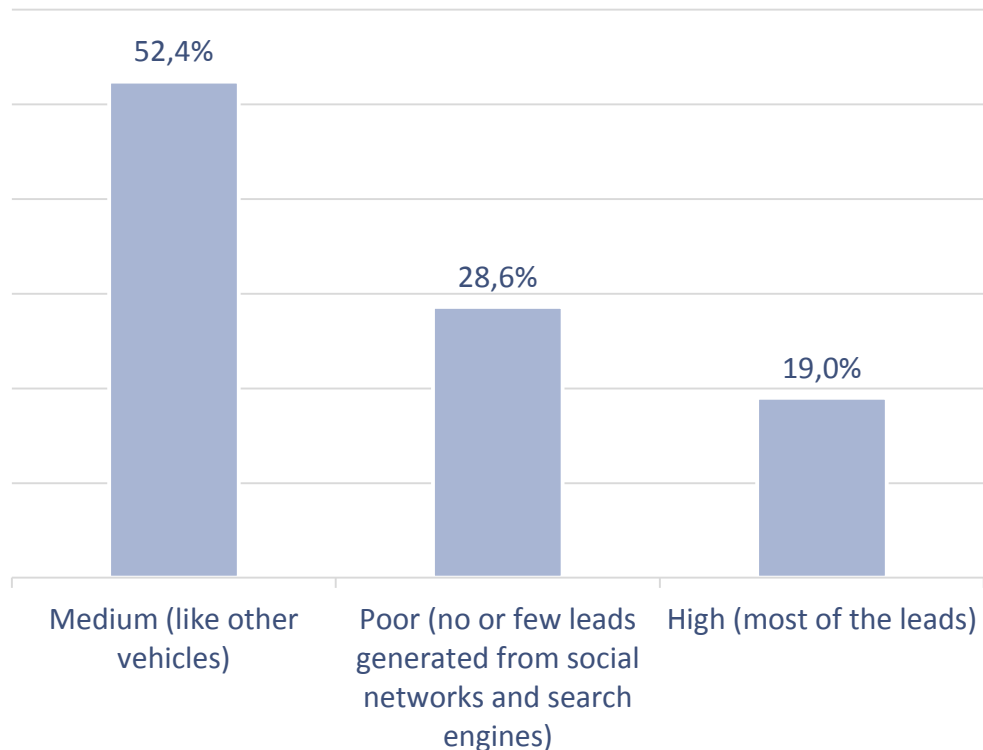


Fig. 6: DBCI Italia May/June 2014 "business research", n=21

- The research on the web in social media or on google and other search engines has only a medium impact on business contacts and networks in Italy
- Since 2013 more international Digital Signage companies try to get a foothold in Italy via positioning themselves prominently in online media
- However, most business relies on direct and personal contacts via an existing professional business network or meetings at fairs and exhibitions





## DBCI | Roadmap 2014 & Contact

<b>2014</b>	
January	
February	
March	
April	
May	
June	
July	← <b>Jul./Aug.   28.07.</b>
August	
September	← <b>Sep./Oct.   18.09.</b>
October	
November	← <b>Nov./Dec.   24.11.</b>
December	

- The next survey will take place in calendar weeks 28 & 29 of 2014.
- The next planned publication date will be the 28<sup>th</sup> of July 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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**Save the Date!**  
**17. - 18. September**  
**2014**



# digital signage

## 8th MUNICH CONFERENCE

17 – 18 September 2014  
Kempinski Hotel Airport Munich





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