

Italy

July | August 2014

DBCI

The pulse of the Digital Signage
and DooH industry

OVAB Digital Signage & DooH
Business Climate Index

OVAB-cooperation partner Italy:

AssoDS
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Digital Signage market is continuously growing

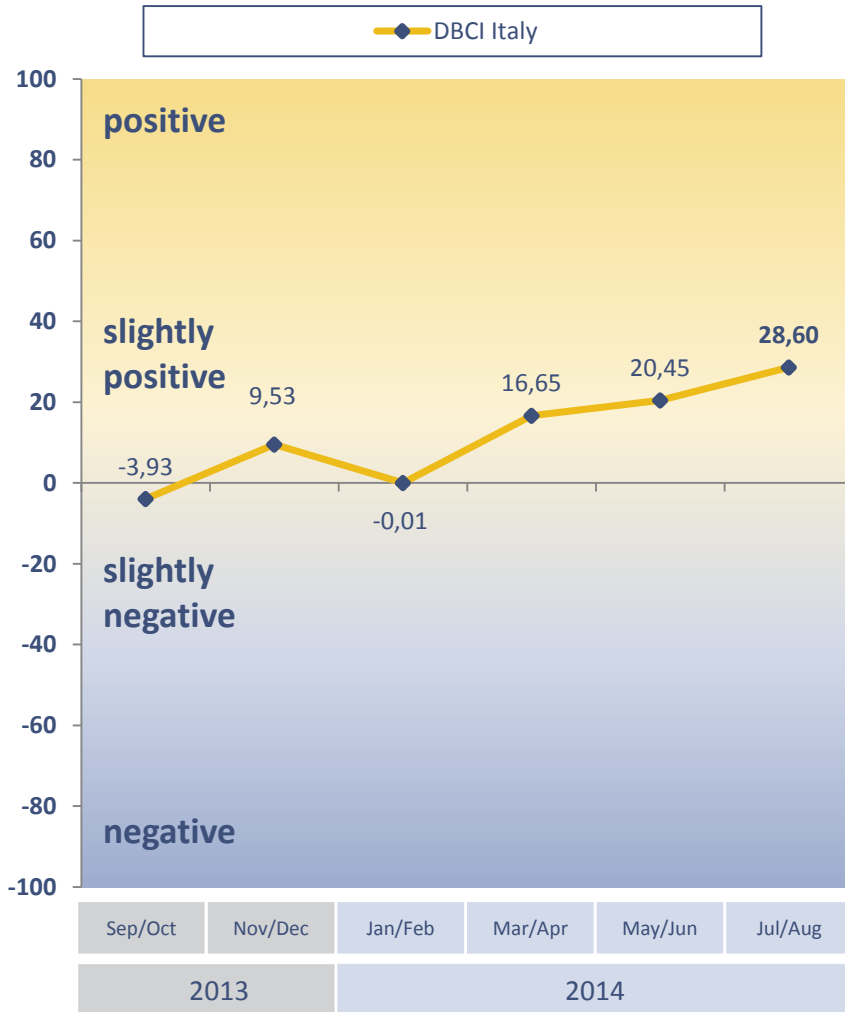


Abb. 1: DBCI July/August 2014 „Index Italy“, n=21

- The Digital Signage Business Climate Index (DBCI) in Italy has increased since the last poll in January. The Index grew by 8,15 points and still remains on the “slightly positive” level
- The industry shows a high satisfaction with the current business situation as 85,7% 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”
- Driven by political reforms like labour cost cuts, interventions to promote public and private investments and payment of overdue debt to firms the Italian economy has started a slow recovery in the second quarter of 2014 which is also recognized in the Digital Signage market

Additional Research

- The market participants expect an increasing demand for Digital Signage solutions for Small Signage (displays smaller than 32”). The most important scenarios are in the retail sector like shelf displays and digital posters at the POS
- Network provider, marketers and agencies still see high challenges for the creative implementation of DooH campaigns

Survey facts

- Participants: n=21
- Region: Italy
- Time frame: 2014 calendar weeks 28 & 29



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?

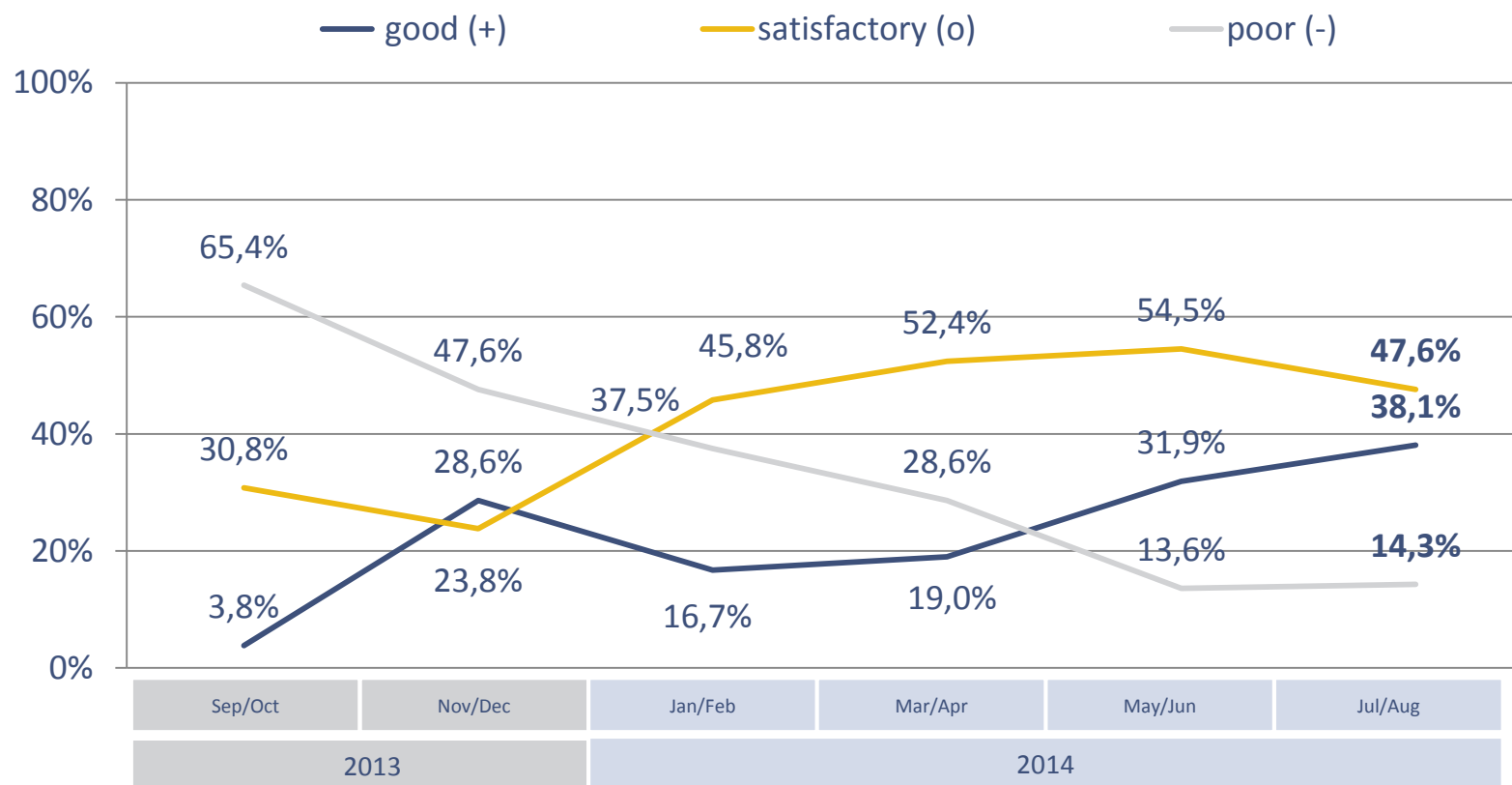


Fig. 2: DBCI Italia July/August 2014 "business situation", n=21



Stable outlook for the second half-year of 2014

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

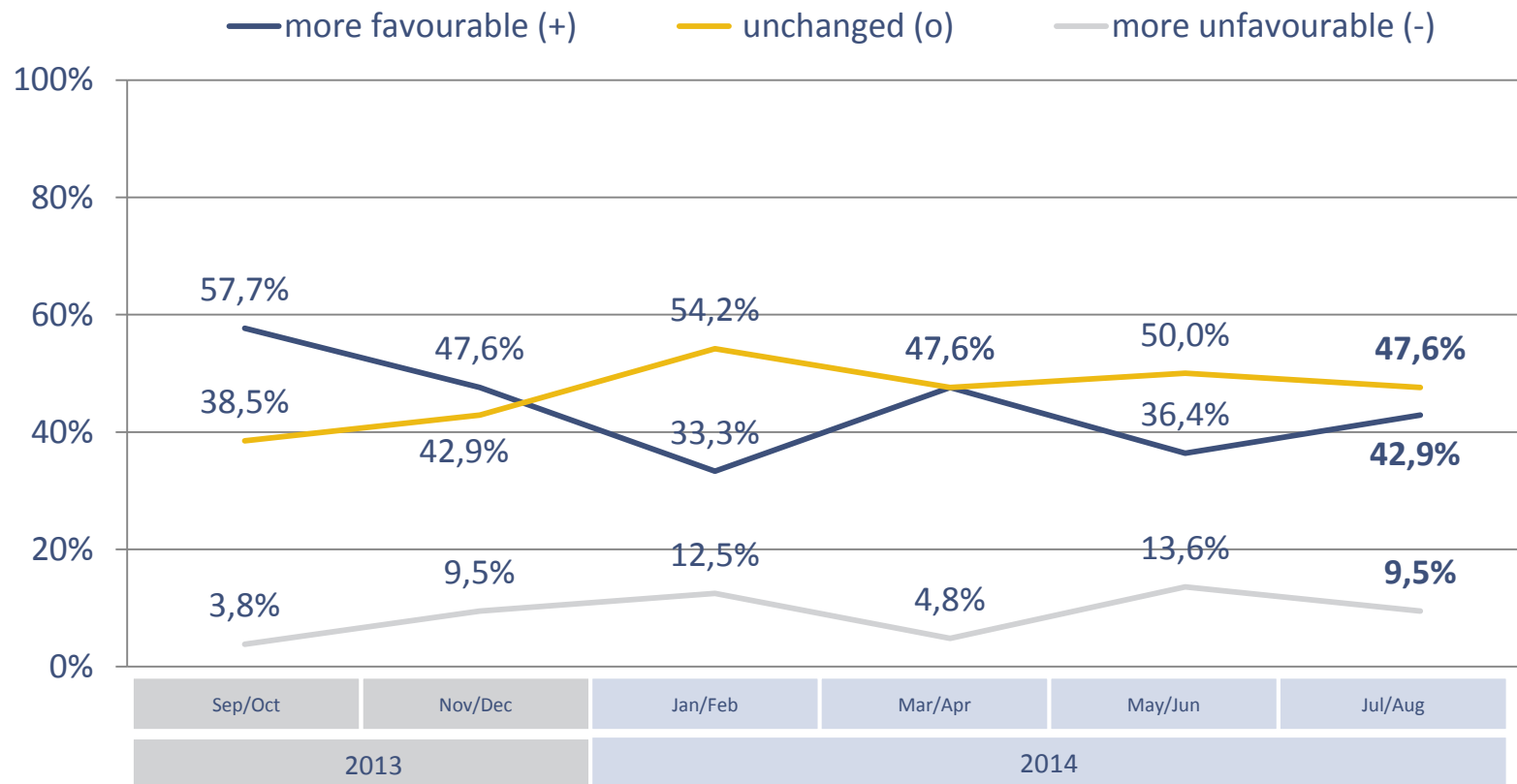
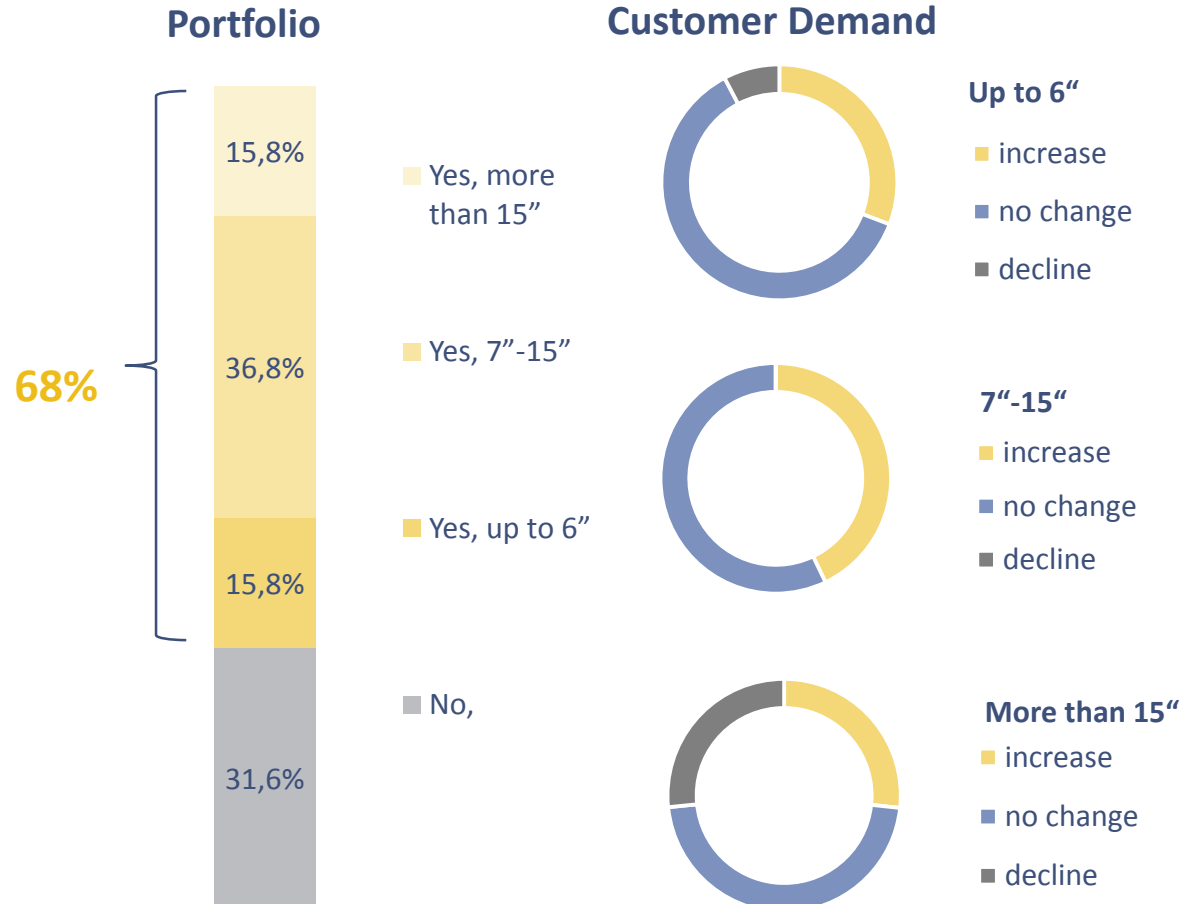


Fig. 2: DBCI Italia July/August 2014 "business situation", n=21



Further research | Increasing demand for Small Signage

- 68% of all polled companies have already installed displays with sizes smaller than 32" in Digital Signage solutions. Particularly the 'tablet' sizes between 7" and 15" are widely in use
- The market participants also predict an increase in customer demand for Small Signage within the next 12 months. For the sizes 7"-15" almost 50% see a rising demand
- However for displays smaller than 7" and bigger than 15" the demand is predicted to be lower. Only 1/4 of all polled companies see here an increase within the next 12 months



Question: „Did you sell or install small professional Displays (smaller 32“) in Digital Signage installations?“

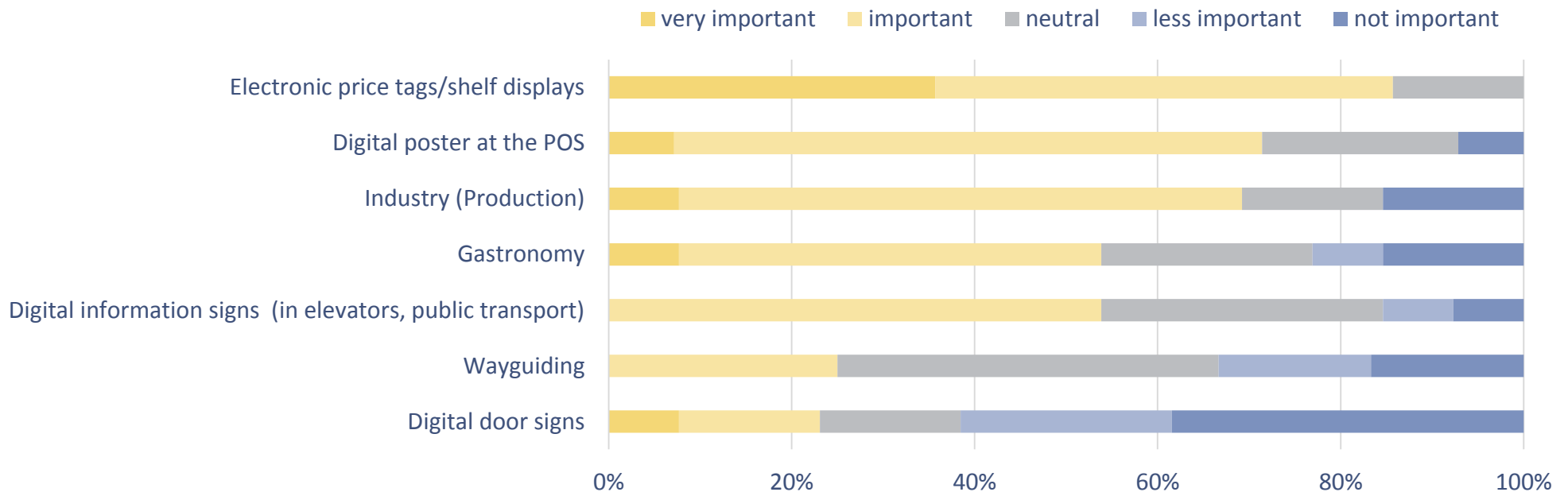
Question: „How do you think will the customer demand for displays smaller 32" in Digital Signage related projects evolve over the next 12 months?“

Fig. 4: DBCI July | August 2014 „Portfolio & Demand – Small Signage“ n=15



Further research | High potential for Small Signage at the POS

- About **70% to 80%** of all polled companies think that shelf displays and digital posters at the POS are the most important scenarios for professional Small Signage (displays smaller than 32")
- Small Signage at the POS: The polled companies see the highest potential for Small Signage at the POS with shelf displays. The demand for e-posters will still grow, but it is not rated to be as high as for the shelf displays

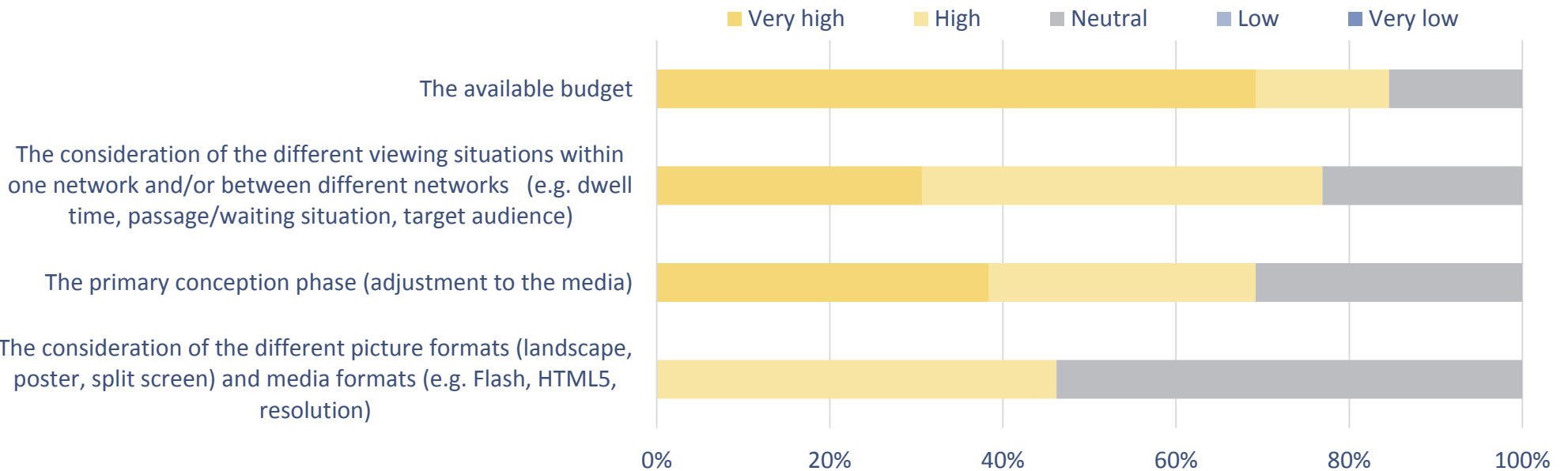


Question: „Where do you see the most important use cases for displays smaller 32“?“

Fig. 5: DBCI July | August 2014 „Use cases for Small Signage“, n=14

 Additional Research | Creativity is still a demanding challenge in DooH

- The creative process in DooH campaigns has to manage many difficult challenges. In particular the restricted budgets in the below-the-line media have a noticeable impact on the creative freedom
- The market participants also see big challenges for DooH campaigns in the the consideration of the diverse viewing situations respectively dwell times. The storyline for spots in a passage situation have to be much more condensed and pronounced than in a waiting situation. Moreover, the primary conception phase, where one adapts campaigns from other media formats to perfectly fit the DooH characteristics is seen as to be challenging
- However, **53,9%** of the polled companies offer 4 or more workshops per year to familiarize their customers with the distinct characteristics of the media



Question: „Please rate how high the challenges in the creative process of a Digital-out-of-Home campaign are?“

Fig. 6: DBCI July | August 2014 „creative challengens for DooH“, n=12



DBCI | Roadmap 2014 & Contact

2014
January
February
March
April
May
June
July
August
September
October
November
December

← **Sep./Oct. | 18.09.**

← **Nov./Dec. | 17. 11.**

- The next survey will take place in calendar week 35-36 of 2014
- The next planned publication date will be the 18th of September 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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digital signage

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2014

