

Italy

November | December
2014

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


invidis
CONSULTING

invidis research
2014 IT 600 en



Digital Signage market with optimistic outlook for 2015

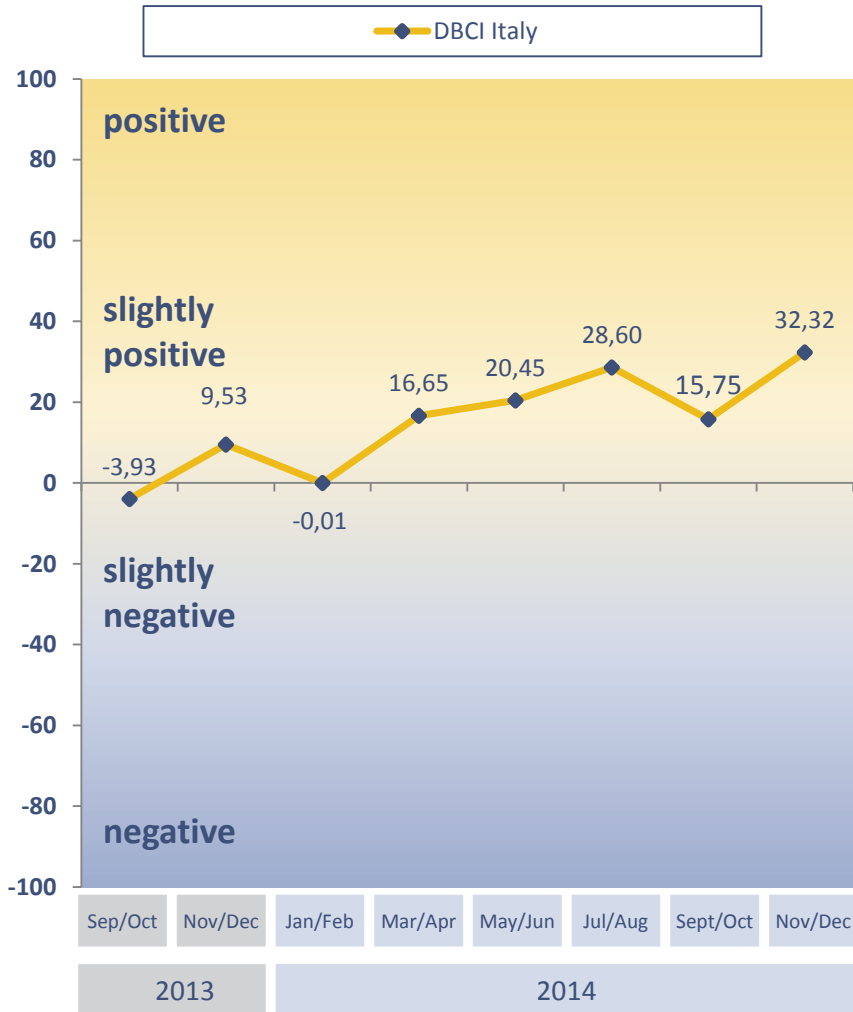


Fig. 1: DBCI November | December 2014 „Index Italy“, n=17

- The Digital Signage Business Climate Index (DBCI) in Italy has significantly increased since the last poll in September. The Index grew by 16,57 points and is now on a “slightly positive” level
- Concerning the current business situation the market is ambiguous. 35% rate their situation as good and again the same number rates their situation as poor. However, all market participant have similar expectations for 2015 as 65% see a more favourable situation in the new year
- The drastic decrease in the oil price since the summer has significantly lowered the energy costs in the major European economies to the effect, that after a dent in September/October, the DBCI is back on the positive trend that started at the beginning of the year

Further research:

- The very high costs for UHD content has a dampening effect on the expectations for full UHD projects in the next year
- Falling hardware prices and availability of plug-and-play solutions have resulted in a satisfying demand for entry-level Digital Signage

Survey facts

- Participants: n=17
- Region: Italy
- Time frame: 2014 calendar weeks 47-48



Positive and negative ratings of the current business situation are increasing

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

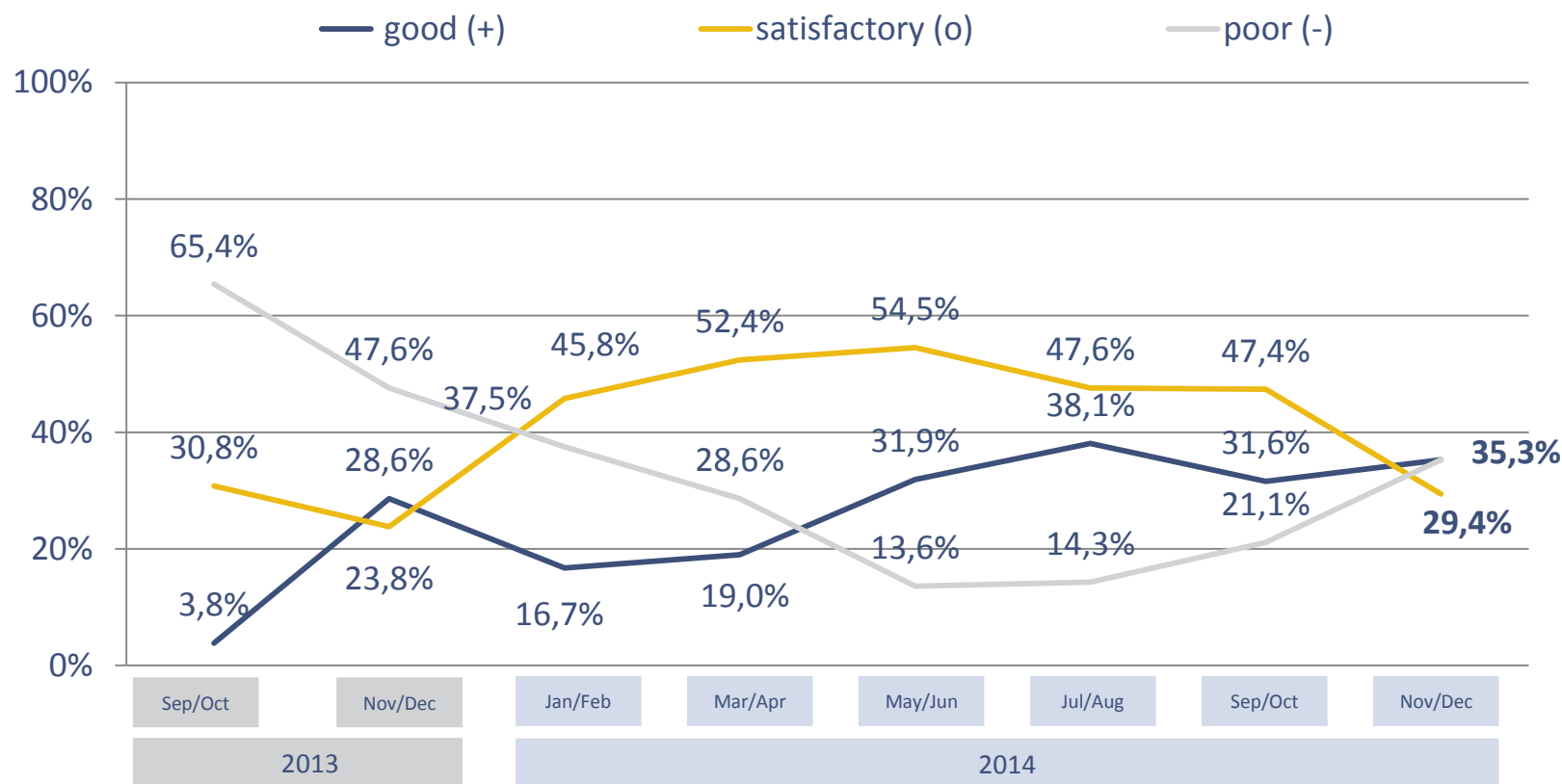


Fig. 2: DBCI Italia November | December 2014 "business situation", n=17



Expectations | Very optimistic outlook for the new year

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

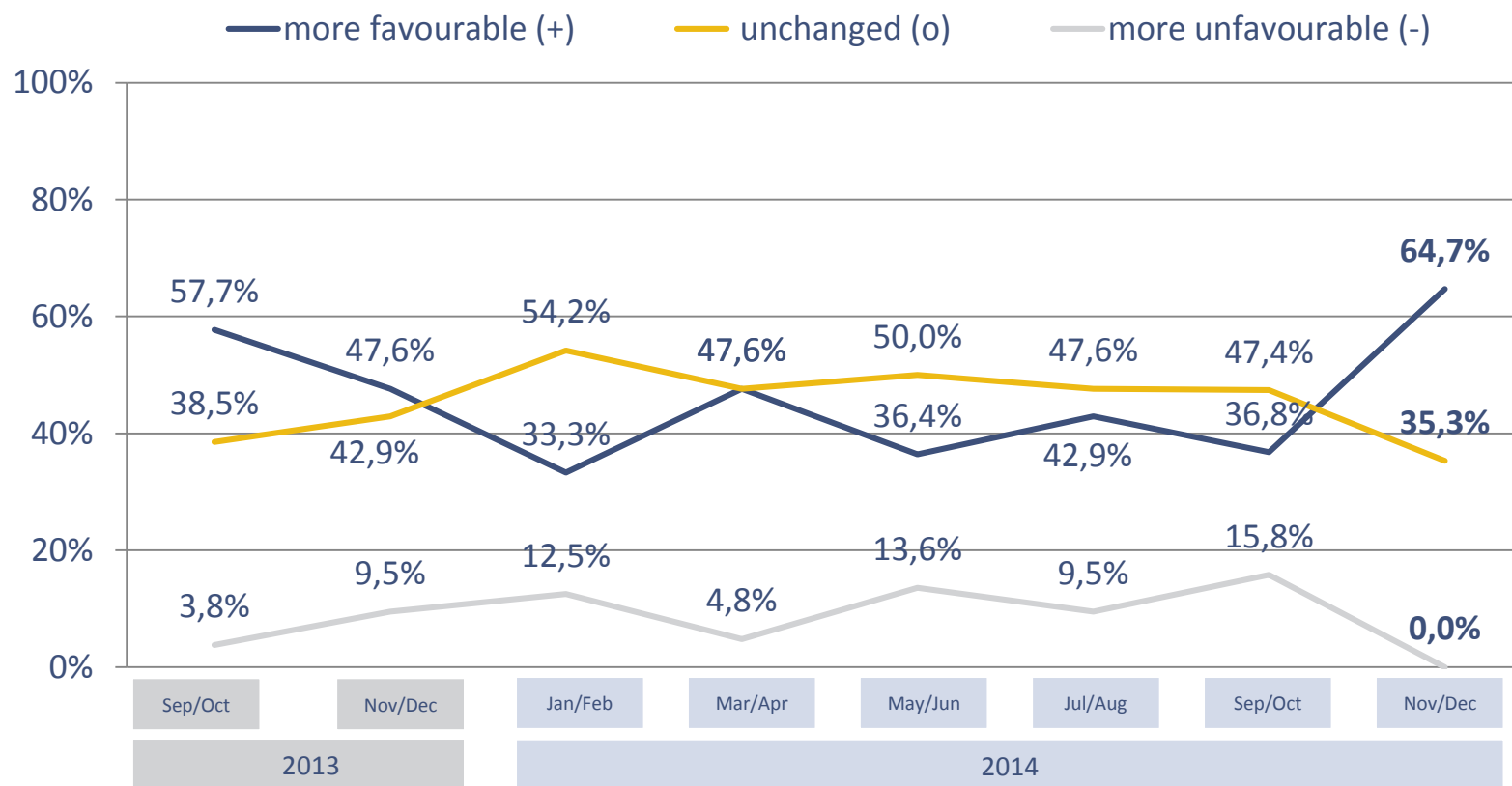


Fig. 3: DBCI Italia November | December 2014 "business situation", n=17



Further research | Low market share for UHD, but satisfying demand for entry level signage

Market share UHD products in Digital Signage projects 2015

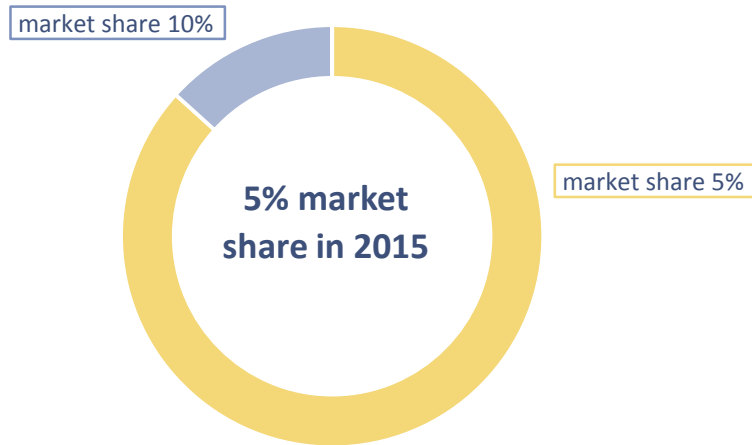


Fig. 4: DBCI Italy November | December 2014
"market share UHD 2015", n=15

Question: How do you expect will the market for UHD products (displays, media player, software, content) evolve over the next 12 months? The market share will be at ...

The very high costs for UHD content has a dampening effect on the expectations for full UHD projects in the next year

Demand for entry-level products in Digital Signage projects 2014

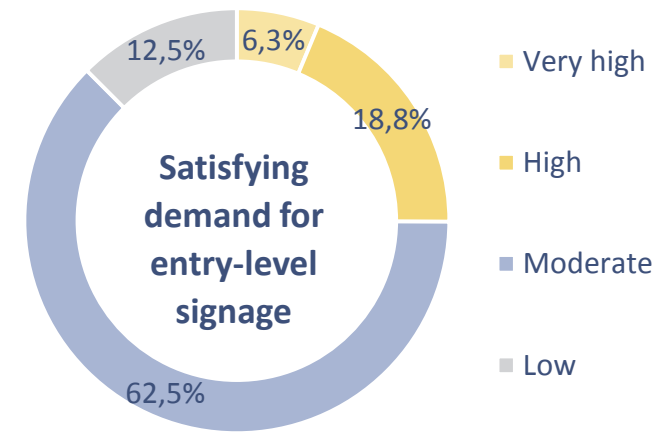


Fig. 5: DBCI Italy November | December 2014
"demand for entry level products 2014", n=16

Question: How much demand did your customers have for entry-level products (hardened consumer displays, cost effective media players, standard software, content shops & templates) within the last 12 months?

Falling hardware prices and availability of plug-and-play solutions have resulted in a satisfying demand for entry-level Digital Signage



Further research | DooH industry favours traditional nomenclature

Question: Which nomenclature do you prefer for Digital-out-of-Home?

70,4% of all polled companies are favouring the nomenclature **Digital-out-of-Home (DooH)** for the media

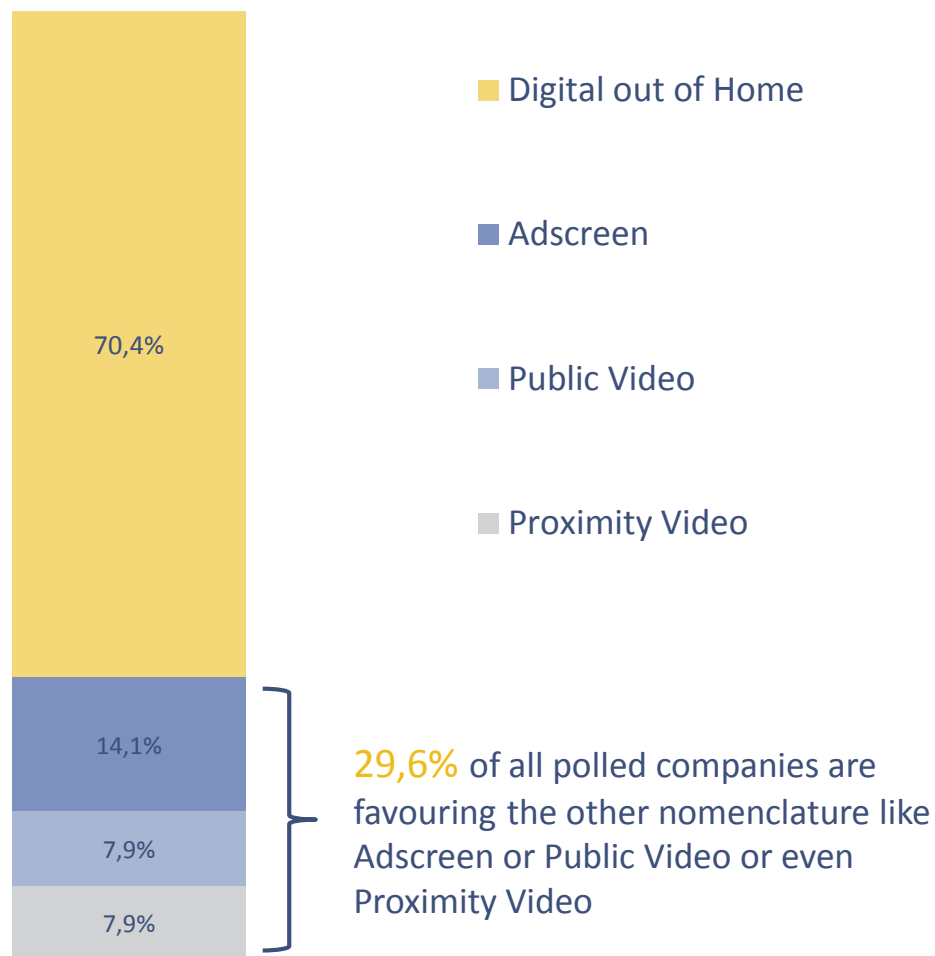


Fig. 6: DBCI Italy November | December 2014
"favoured nomenclatura DooH", n=16



DBCI | Roadmap 2015 & Contact

2015	
January	Jan./Feb. 02.02.2015
February	
March	Mar./Apr. 23.03.2015
April	
May	May/Jun. 18.05.2015
June	
July	Jul./Aug. 20.07.2015
August	
September	Sept./Oct. 17.09.2015
October	
November	Nov./Dec. 26.10.2015
December	

- The next survey will take place in calendar week 3-4 of 2015
- The next planned publication date will be the 2nd of February 2015
- 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 2015. For further information please contact Daniel Russell

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