

Italy

May | June 2015

DBCI

The pulse of the Digital Signage
and DooH industry

OVAB Digital Signage & DooH
Business Climate Index



OVAB-cooperation partner Italy:

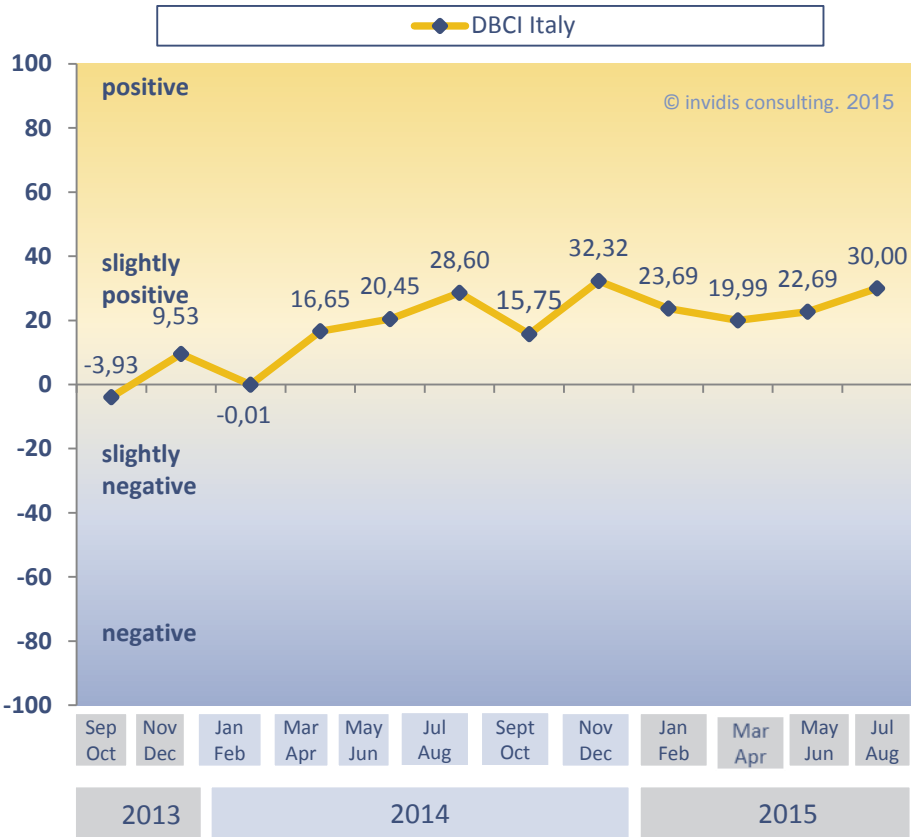


invidis research
2015 IT 400 en





Digital Signage market follows up on the slight growth in business sentiment from May



- The Digital Signage Business Climate Index (DBCI) in Italy has increased since the last poll in May. The Index grew from 22,69 base points by 7,31 points to reach 30,0 base points.
- While the current business situation is assessed more positively by the market participants compared to May, the outlook for the future has become slightly more conservative

Further research:

- In 2014 approximately between 5% and 10% of all Digital Signage solutions or DooH campaigns were realized with the integration of mobile devices
- Within the next two years the market participants see the current situation changing. The market share of Digital Signage solutions or DooH campaigns using mobile integration will grow to on an average of 10%.

Participants: n=22; Region: IT; Survey Period: 2015 calendar weeks 27-28

Fig. 1: DBCI Italy July / August 2015 „Index“, n=22



10.-11. September 2015
Digital Signage Summit Europe in Munich
www.digitalsignagesummit.org



 Status Quo | Companies with positive current business situation increases

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

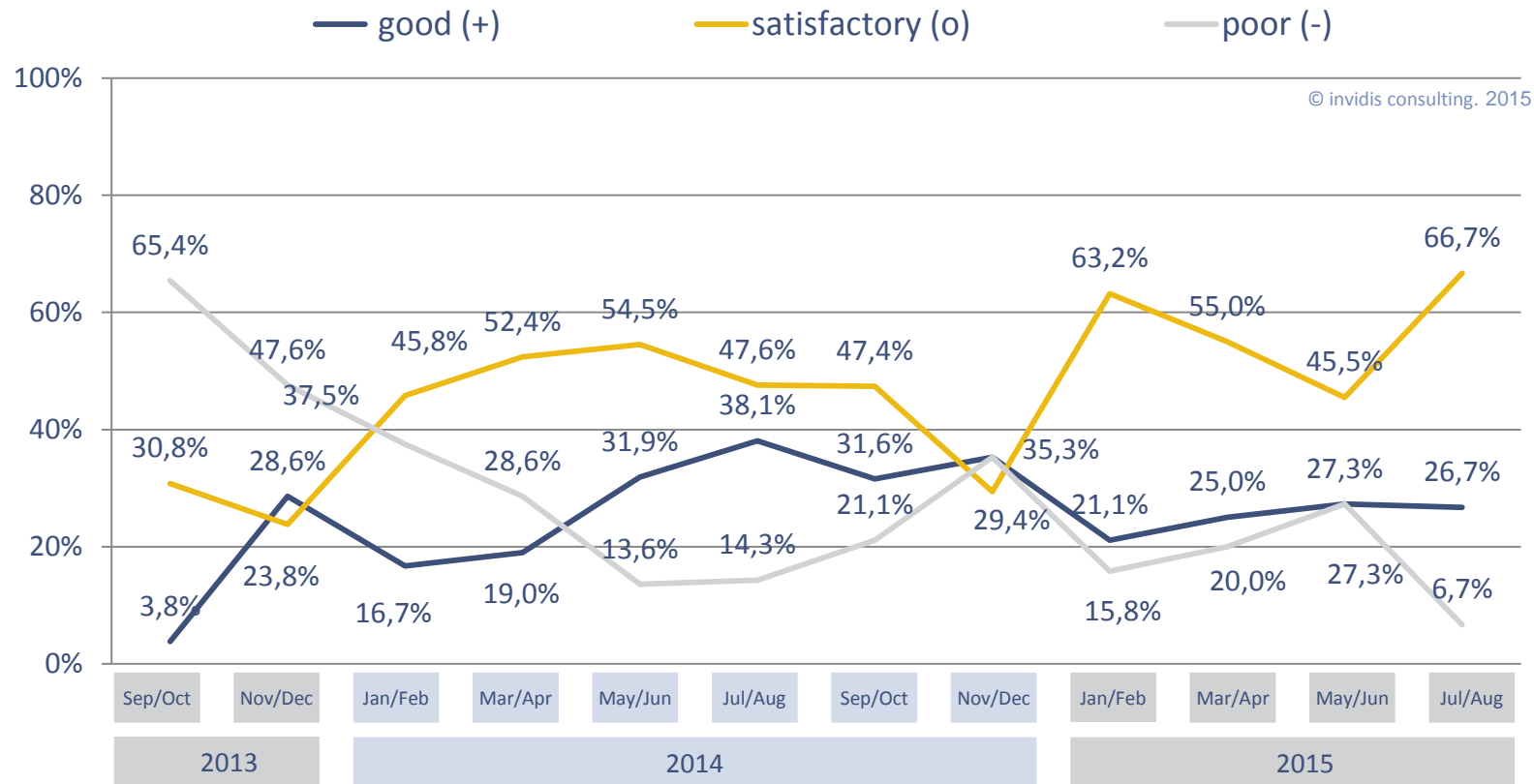


Fig. 2: DBCI Italia July | August 2015 "business situation", n=22



Expectations | Slightly more conservative outlook for the next six months

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

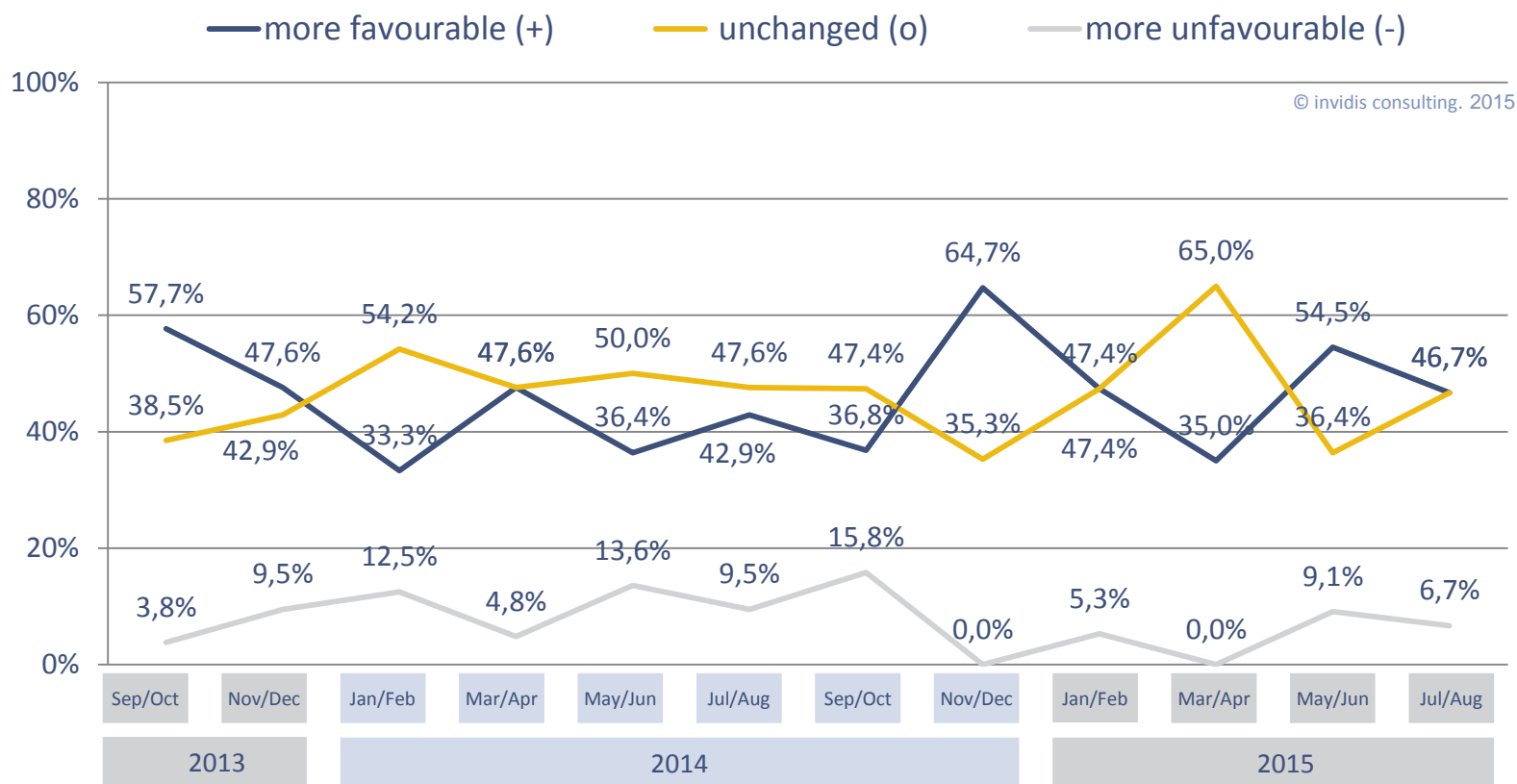


Fig. 3: DBCI Italia July / August 2015 "business expectations", n=22



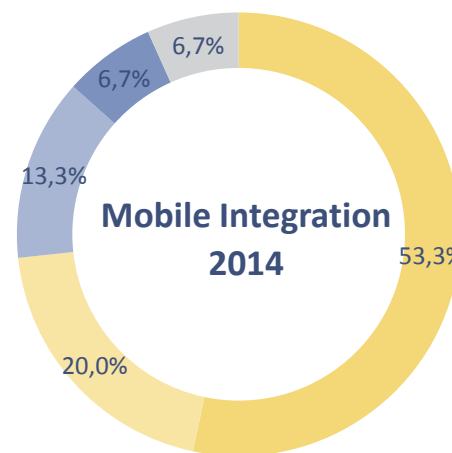
Further research | Mobile integration is still in it's infancy

Question: How high was the percentage of Digital Signage installations or DooH campaigns with mobile integration you have realized in the last 12 months?

- Mobile integration is one of the buzzwords connected to the omni-channel retail concept within the digital transformation
- However, in 2014 still clearly less than 10% of all Digital Signage solutions or DooH campaigns were actively banking on integrating mobile devices
- Most installations or campaigns still rely on content which doesn't access the many interactive possibilities of the digital world, but rather is a digitized version of an analogue media format (i.e. poster)

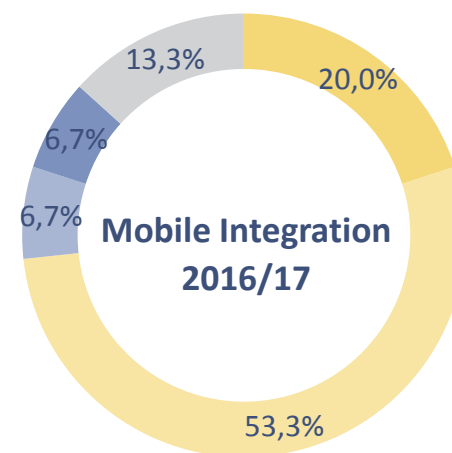
Question: How high do you expect the percentage of Digital Signage installations or DooH campaigns with mobile integration will be in 24 months?.

- Within the next two years the market participants see the current situation changing. The expectation is that in average between 10% and 15% of all of projects will be rolled out with mobile integration.



Market share of Digital Signage solutions with mobile integration in 2014

- less than 10%
- 10%
- 20%
- 30%
- more than 30%



Market share of Digital Signage solutions with mobile integration in 2016/17

- less than 10%
- 10%
- 20%
- 30%
- more than 30%

Fig. 4: DBCI Italy July | August 2015 "mobile integration", n=21



DBCI | Roadmap 2015 & Contact

2015	
January	
February	
March	
April	
May	
June	
July	
August	
September	← Sept./Oct. 2015/10/05
October	
November	← Nov./Dec. 2015/12/07
December	

- The next survey will take place in calendar week 36-37 of 2015
- The next planned publication date will be the 5th of October 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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