

Italy

November | December  
2015

**DBCI**

The pulse of the Digital Signage  
and DooH industry

**OVAB** Digital Signage & DooH  
Business Climate Index

OVAB-cooperation partner Italy:

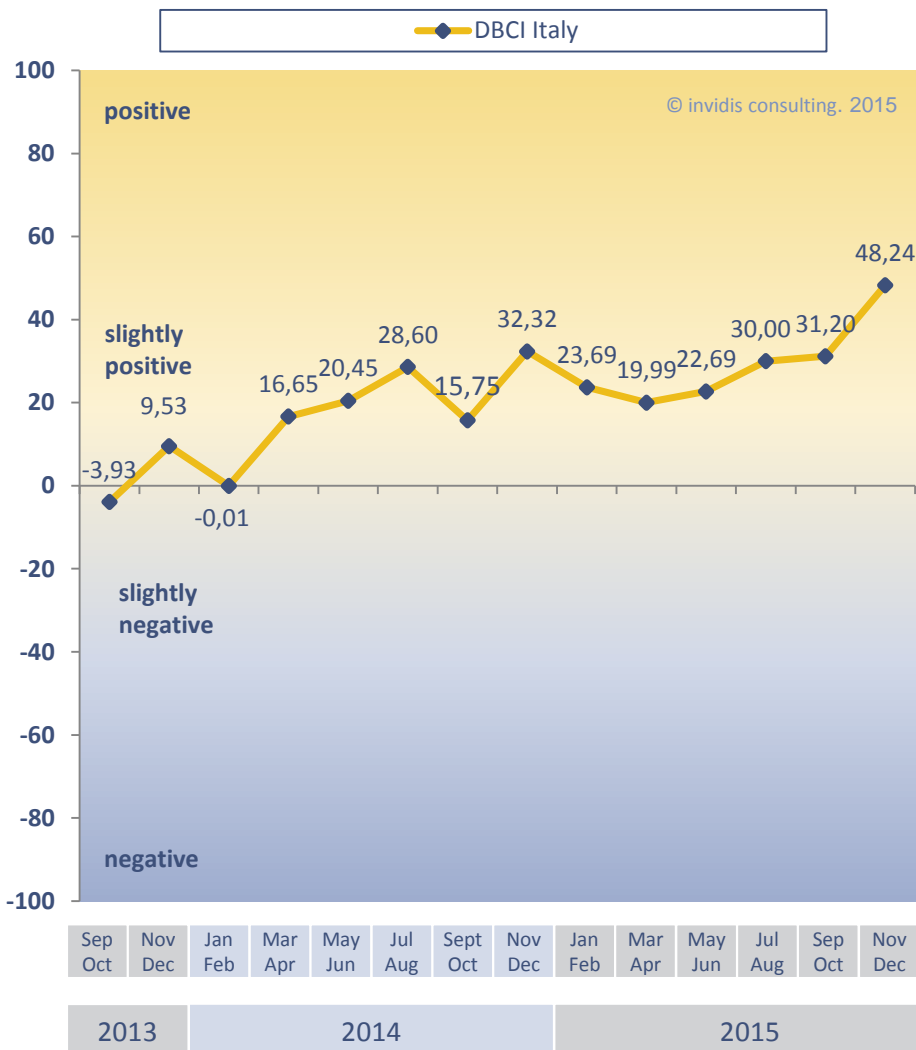
**AssoDS**  
Associazione operatori Digital Signage

  
**invidis**  
CONSULTING

invidis research  
2015 IT 600 en



## Digital Signage market business sentiment with end-of-year rally



- The Digital Signage Business Climate Index (DBCI) in Italy has strongly increased since the last poll in September. The Index grew from 31,20 base points by 17,04 points to reach 48,24 base points.
- The DBCI has again taken up speed and continued its consistent upwards trend of the last 24 months. The current business situation has increased to a very good level, as now over 90% of the polled companies are satisfied or better.
- In turn the optimism towards the near future saw a slight correction by 10%. Now 64% of all polled companies expect a *more favourable* situation for their business within the next six months.

### Further research:

- The market leaders among the distributors in Italy are Esprinet, Ingram Micro and TD Maverick. Between 45% and 80% of the market participants have worked with those competitors.
- 39% of the DooH market has seen a rise in bookings in the current year. The overall market is expected to register a healthy increase in the number of advertising bookings for 2015

Participants: n=28; Region: IT; Survey Period: 2015 calendar weeks 47-48

Fig. 1: DBCI Italy November | December 2015 „Index“, n=28



# Status Quo | Companies see a very good current business situation

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

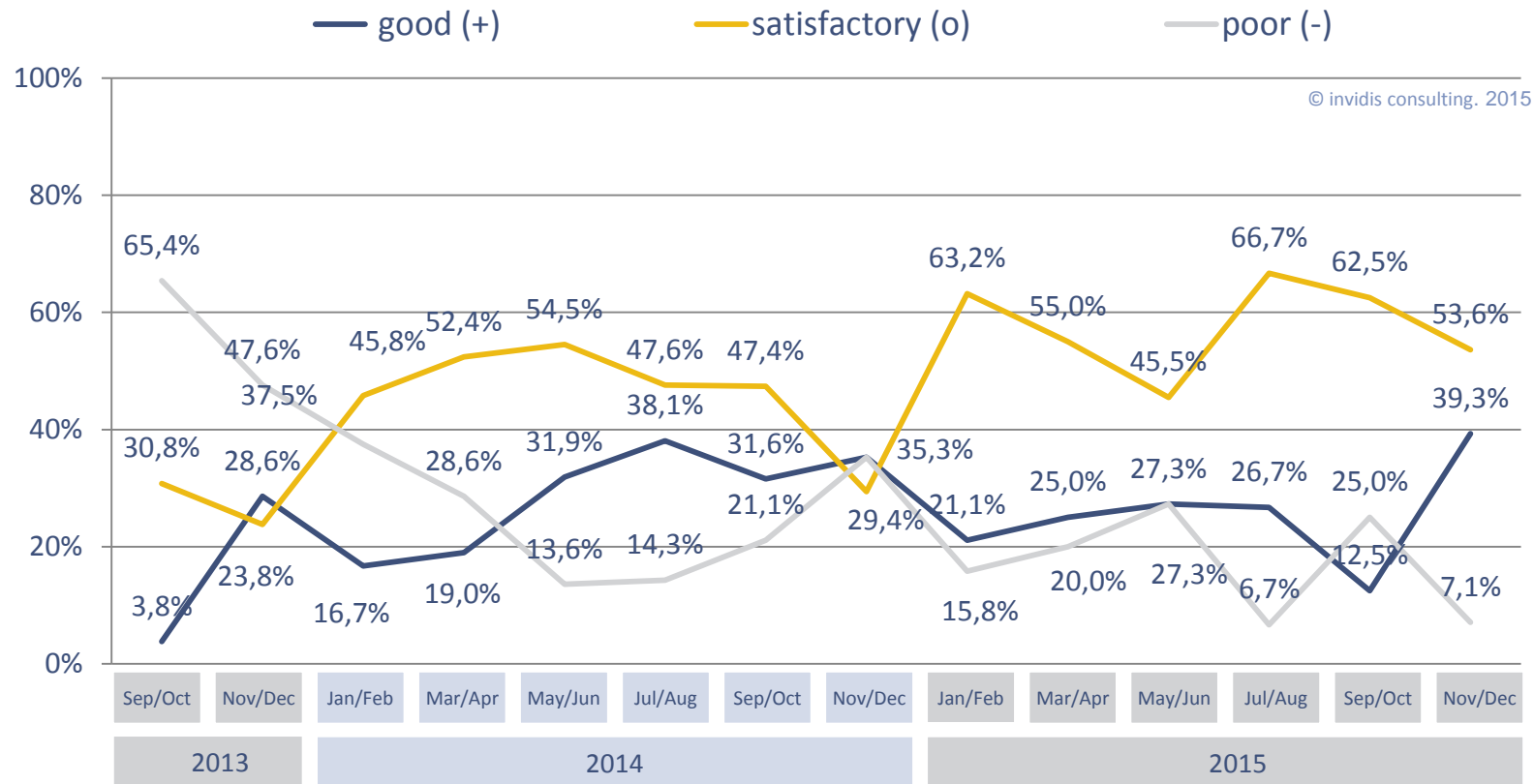


Fig. 2: DBCI Italy November | December 2015 "business situation", n=28



# Expectations | Slightly more conservative outlook for the next six months

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

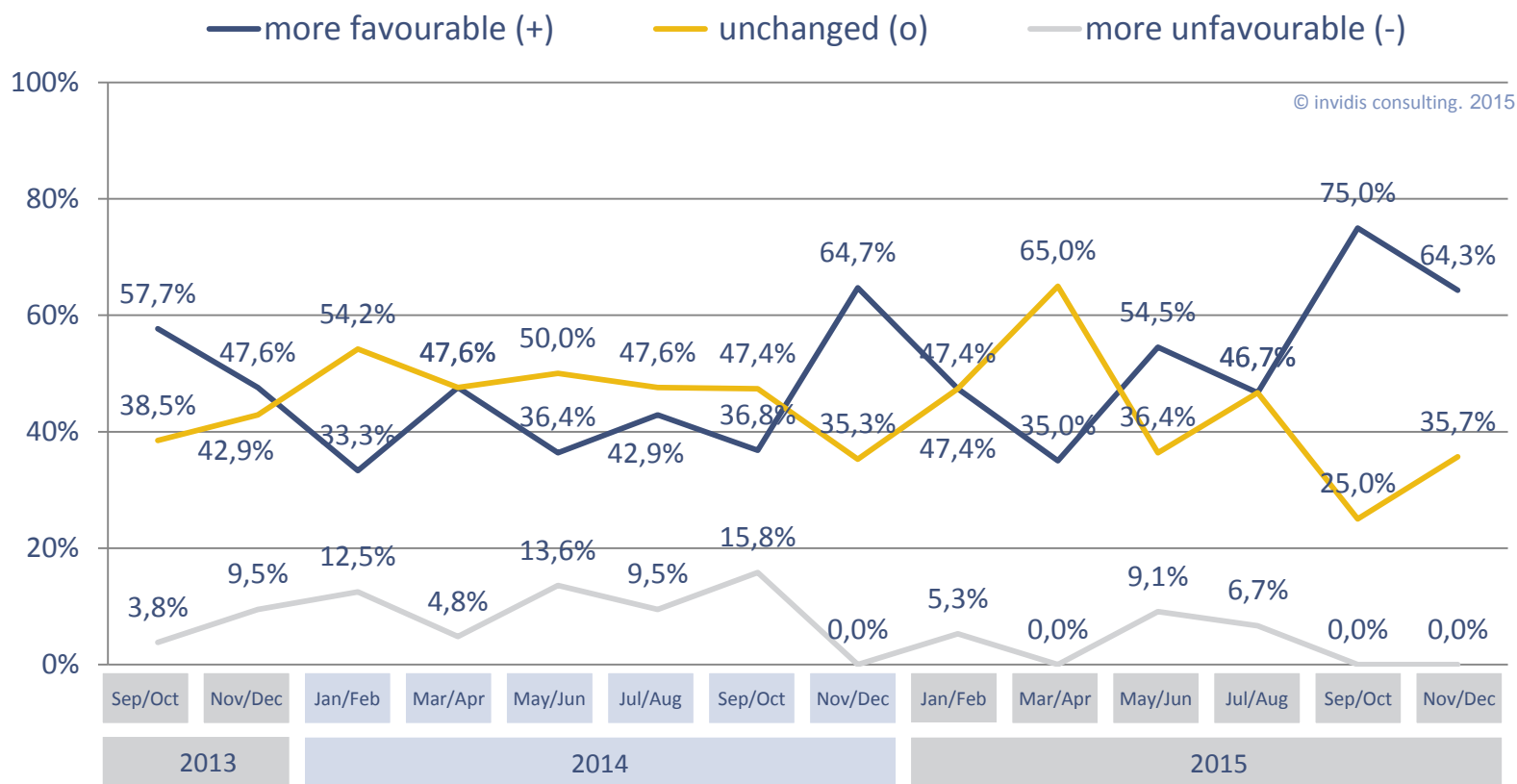


Fig. 3: DBCI Italy November | December 2015 "business expectations", n=28

 Further research | The distributor market is dominated by the Top 3

**Question:** „With which distributors do you work together?“

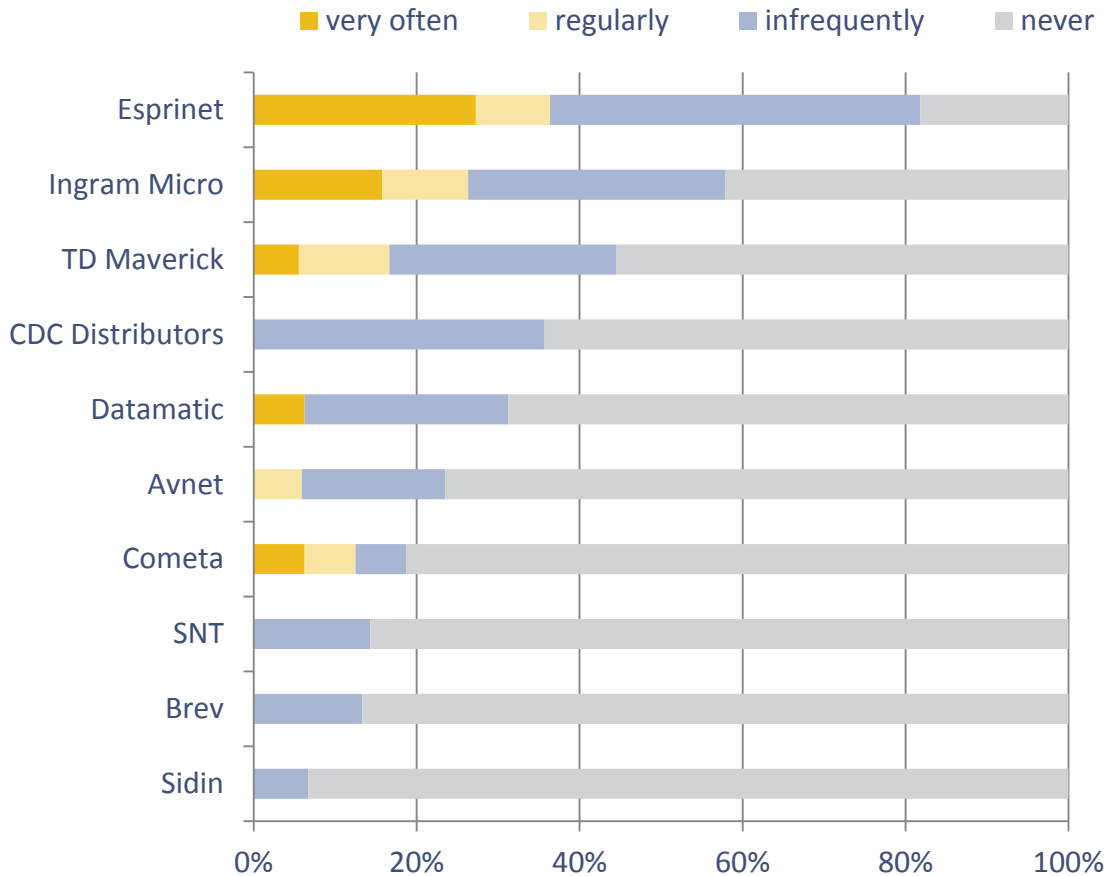


Fig. 4: DBCI Italy November/December 2015 "Ranking distributors", n=17 (mean value)

- The market leader among the distributors in Italy is Esprinet. Over 80% of all polled companies have worked with this distributor at least once.
- Also in many other countries a local champion plays an important role in the market for distributors. In France it is SIDEV, in Germany Delo and in Switzerland MobilePro.
- In short succession follow the international distributors Ingram Micro and TD Maverick. Between 45% and 55% of the market participants have worked with those competitors.
- Most IT distributors offer Digital Signage related services. The market participants have noted that DS projects offer a good possibility to generate additional revenues to the standard box-moving business.



## Further research | DooH is steadily increasing in relevance

**Question:** Please rate the degree of capacity utilization of your DooH network(s) with advertising bookings in 2015 compared to 2014 (including the expected bookings until the end of the current year)?

- Over 39% of polled companies currently doing business in the Digital out of Home market have seen a rise in advertising bookings in the current year. The overall market is expected to register a healthy increase in the total number of bookings for 2015.
- 56% of the market has registered no change in the number of advertising bookings in the year-on-year trend in 2015 compared to 2014. Only 6% of the polled companies expect a decline.
- In general DooH is starting to play a more and more important part in the media landscape. DooH is accounting for the most dynamic segment in the traditional ooH advertising branch. Primarily through the digitalisation of media assets has the industry been able to compete with the development in the new media landscape.

### YoY bookings of DooH Networks 2014/15

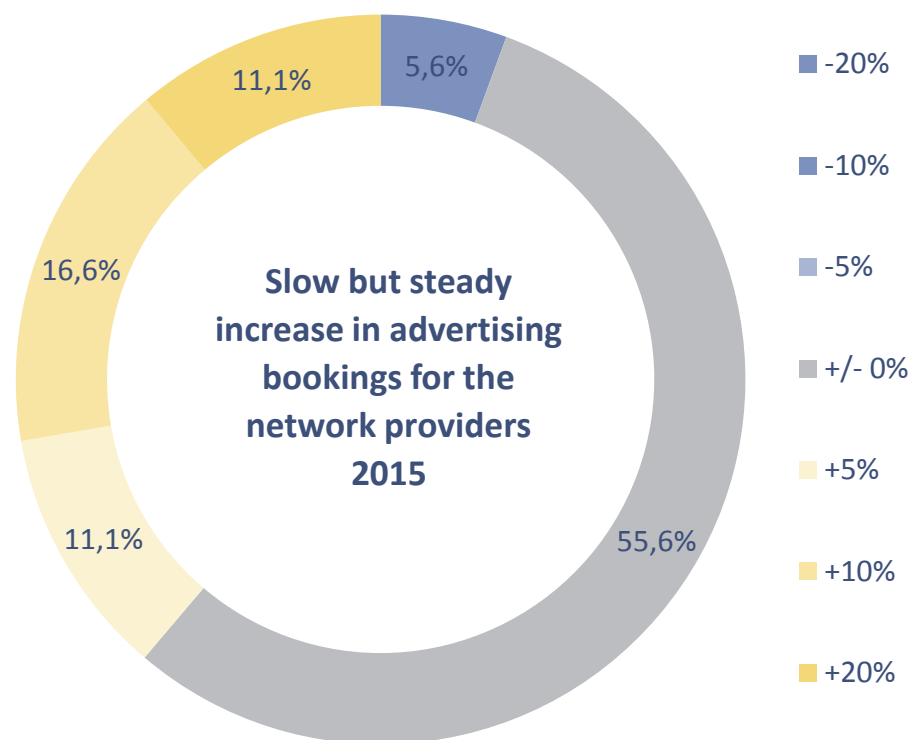


Fig. 5: DBCI Italy November | December 2015 "capacity utilization 2014/15", n=18



## DBCI | Roadmap 2015 & Contact

2016	
January	Jan./Feb.   2016/02/01
February	
March	Mar./Apr.   2016/03/21
April	
May	May./Jun.   2016/05/23
June	
July	Jul./Aug.   2016/07/18
August	
September	Sep./Oct.   2016/09/19
October	
November	Nov./Dec.   2016/11/21
December	

- The next survey will take place in calendar weeks 2-3 of 2016
- The next planned publication date will be the 1<sup>st</sup> of February 2016
- 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 2016. For further information please contact Daniel Russell.

### Contact

Daniel Russell | Research Analyst  
 invidis consulting GmbH  
 Rosenheimer Str. 145e  
 81671 München  
[Daniel.Russell@invidis.com](mailto:Daniel.Russell@invidis.com)  
 Phone: +49 89 2000416-21  
 Mobile: +49 151 62438503  
 Fax: +49 1805 5224 301