

Italy  
1<sup>st</sup> Quarter 2017

**DBCI**

The pulse of the Digital Signage  
and DooH industry



Digital Signage & DooH  
Business Climate Index

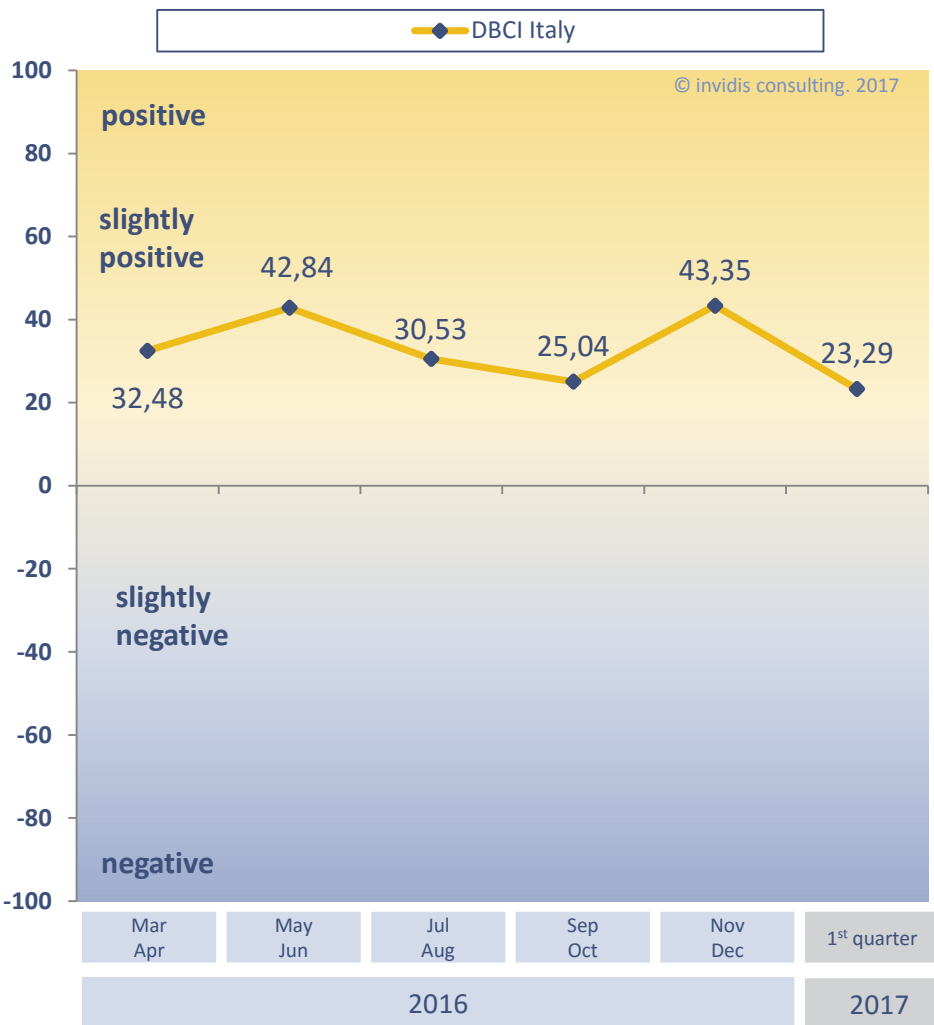
Cooperation partner Italy:



invidis research  
2017 IT 100 en



# Volatile business sentiment in the Digital Signage market in Italy



- The Digital Signage Business Climate Index in Italy has remained volatile at the beginning of 2017. After a strong increase in the winter, the index has seen a decrease of 20,06 base points from 43,35 points to 23,28 base points. In total the Index is down by -35% year-on-year and up by 46% compared to the previous survey.
- The current business situation in Italy is still good, but the market participants are markedly more worried that the current economic climate will reflect negatively on the business in the first quarter of the year.
- However the outlook towards the near future registered an increase of the more optimistic expectations concerning the business situation for products and services within the next six months.

### Further Research

- 46,7% of all companies in the Digital Signage market in Italy have hired new staff in 2016. In total between 30-50 new jobs were created.

change DBCI 2017 #1

year-on-year **-35,2%**

previous survey **-46,3%**

Fig. 1: DBCI Italy 1st Quarter 2017 „Index“, n=15

Participants: n=15; Region: IT; Survey Period: 2017 calendar weeks 2-3



# Strong increase in negative ratings for the current situation

Current business Situation | Italy | 1st Quarter 2017

Expectations | Italy | 1st Quarter 2017

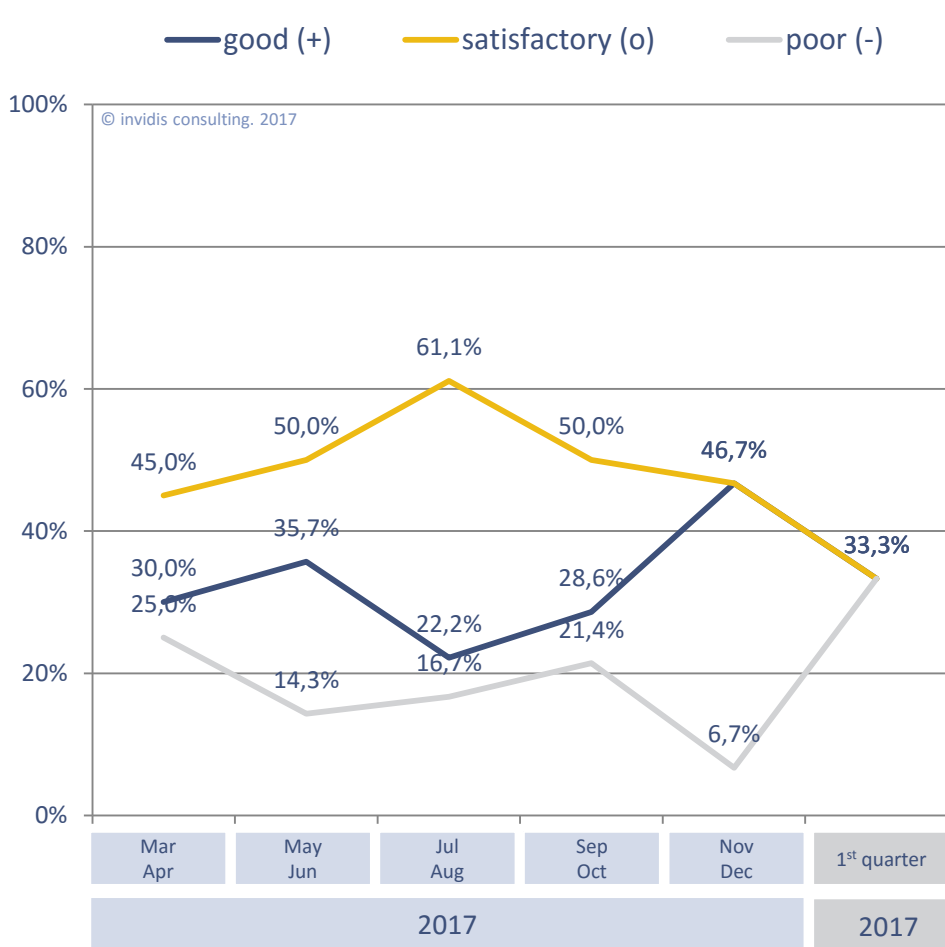


Fig. 2: DBCI Italy 1st Quarter 2017 „Business Situation“ rolling 12 months, n=15

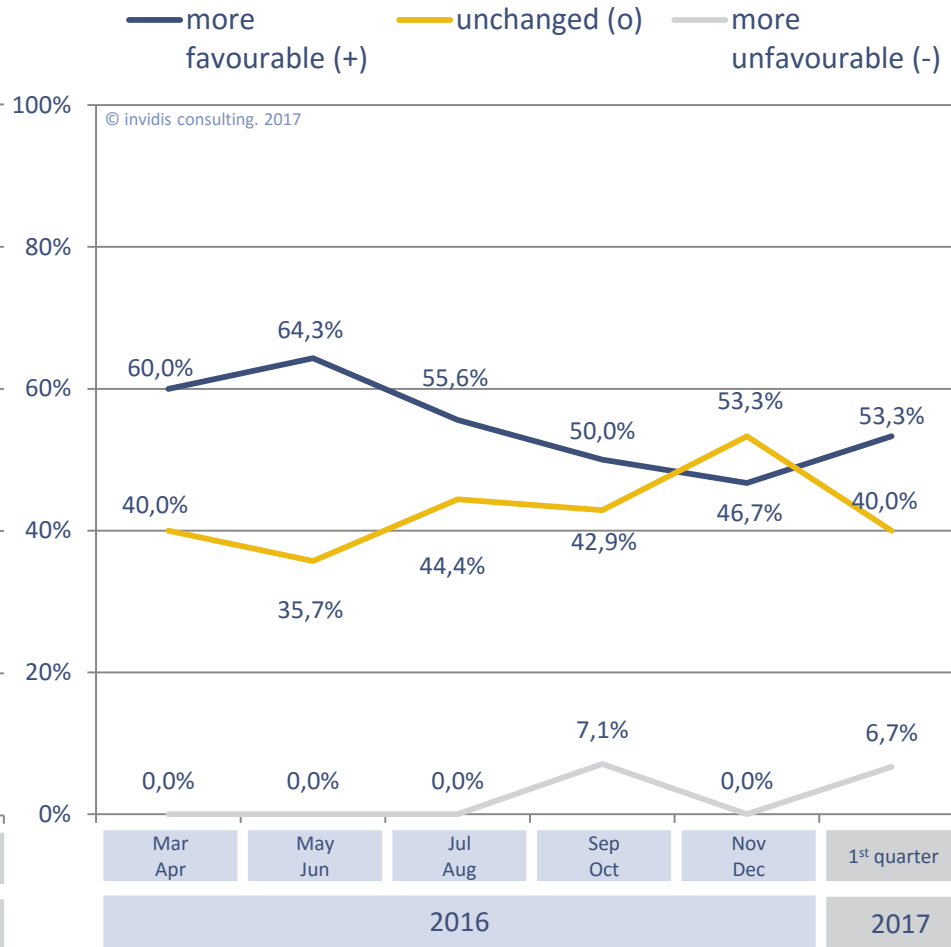


Fig. 3: DBCI Italy 1st Quarter 2017 „Expectations“ rolling 12 months, n=15



## Hirings 2016 | Digital Signage creates many new jobs

- **46,7%** of all companies in the Digital Signage market in Italy have hired new staff in 2016. In total between **30-50 new jobs** were created.
- The digital transformation in private and business life is responsible for an unbroken positive trend in the IT industry. Overall this has developed into a definite shortage of qualified personal. Companies are more and more concerned, how they can match recruiting with their growth strategy.
- As a whole there is a high demand for digital experts on all management levels. Particularly qualified project managers and key account positions are in demand. But also technicians, programmers and administrators can be difficult to hire in highly industrialised regions where the competition for talent is strong.
- The increasing expansion in vertical markets by Digital Signage companies leads to a demand for more professionals from different industry branches.

Company growth in new jobs created 2016

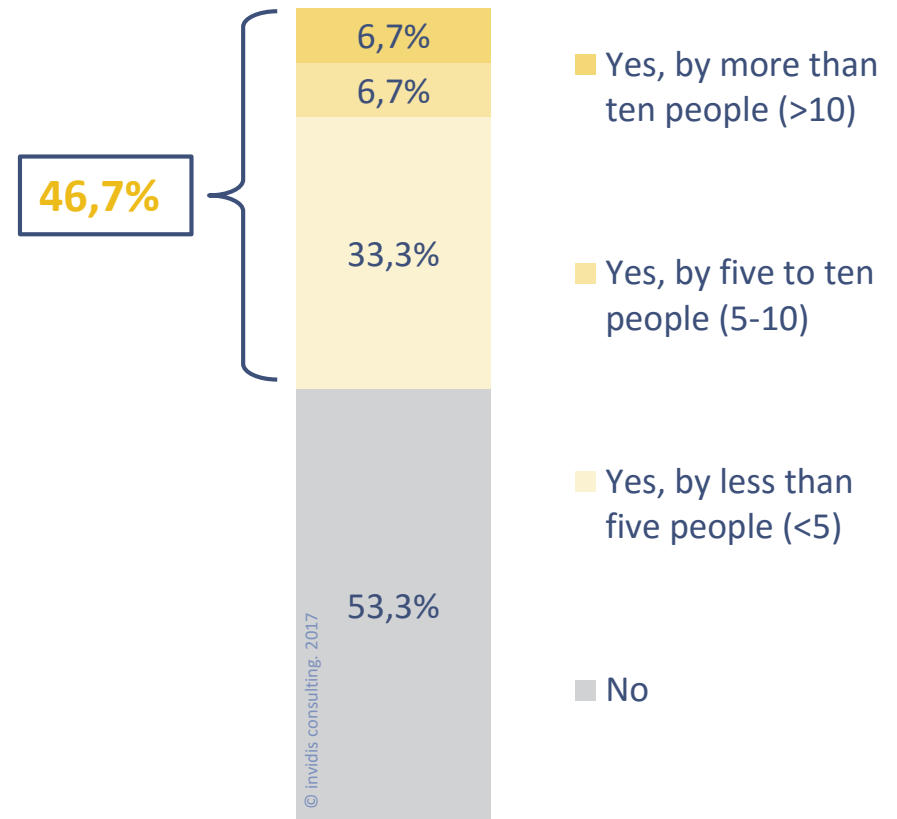


Fig. 4: DBCI Italy 1st Quarter 2017 "Hirings 2016", n=15



# Roadmap 2017 & Contact

<b>2017</b>
January
February
March
April
May
June
July
August
September
October
November
December

← 2<sup>nd</sup> quarter | 2017

← 3<sup>rd</sup> quarter | 2017

← 4<sup>th</sup> quarter | 2017

- The DBCI has recalibrated its iteration from a two month period to a three month period starting in 2017
- The next survey will take place in calendar weeks 14-15 of 2017. The next planned publication date will be in May 2017
- The DBCI is polled by invidis consulting and published in cooperation with DSF 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 2017. For further information please contact Daniel Russell.

**invidis consulting**  
invidis is a renowned boutique consulting and research house based in Munich. Delivering actionable information and advise to customers across EMEA.

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- Each event features visionary and best practise presentations as well as panel discussions concerning the most recent state of the art projects, trends and drivers of the industry
- All events also have a dedicated exhibition space for product presentation and networking opportunities
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  - DSS Europe | Munich: 5.-6. July 2017
  - DSS MENA | Dubai: September 2017
  - DSS Russia | Moscow: October 2017
  - DSS Africa | Johannesburg: October 2017
- More information at [digitalsignagesummit.org](http://digitalsignagesummit.org)