# Italy

## 2nd Quarter 2017

# DBCI

Digital Signage & DooH
Business Climate Index

Cooperation partner Italy:

AssoDS
Associazione operatori Digital Signage

The pulse of the Digital Signage and DooH industry

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# Continouse decline in the Digital Signage business sentiment

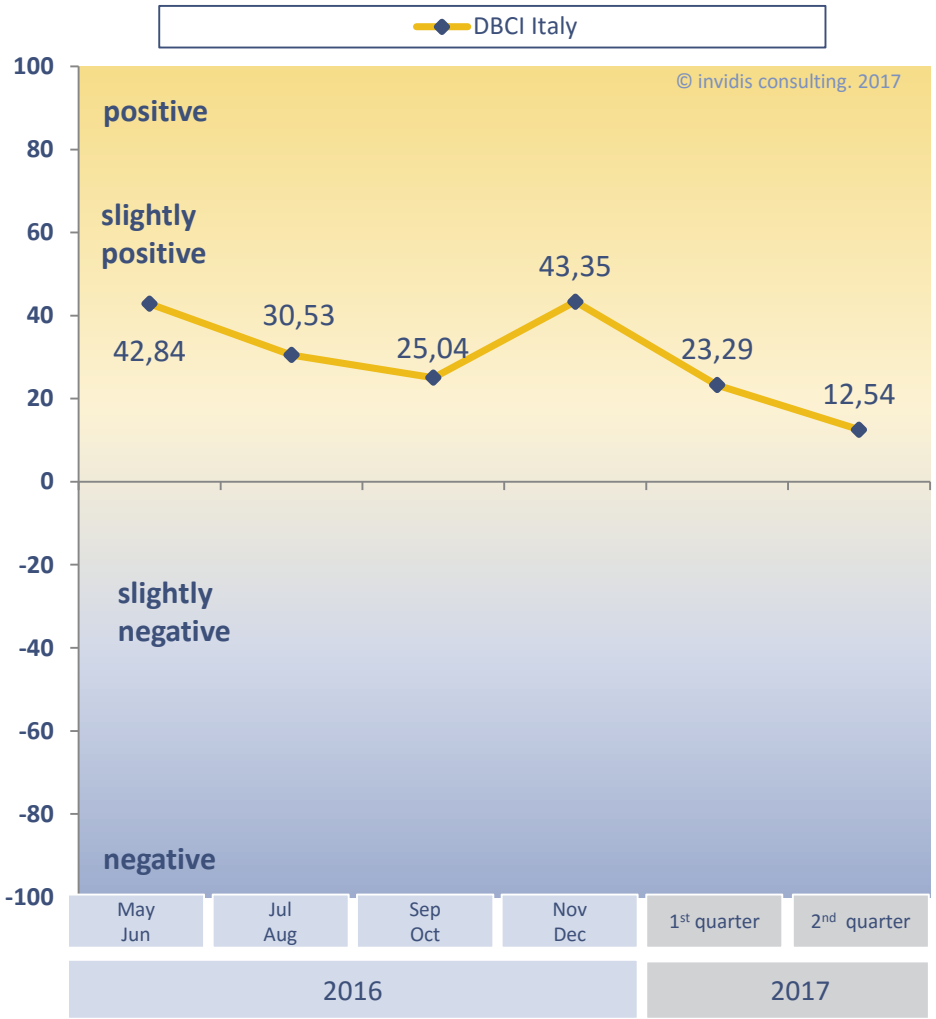


*Fig. 1: DBCI Italy 2nd Quarter 2017 „Index “, n=12*

Participants: n=12; Region: IT; Survey Period: 2017 calendar weeks 14-15

- The Digital Signage Business Climate Index in Italy has remained on a continouse decline since the beginning of 2017. After a strong increase in the winter, the index has seen a decrease of 10,75 base points from 23,29 points to 12,54 base points.
- With neutral answers increasing by almost 30% the assessment of the current business situation has become much more conservative then in the previous survey.
- Also the outlook towards the near future is in decline. Now only 41% of the surveyed companies are expecting an *more favourable* business situation for their products and services in the next six months.

**Further Research**

- Microsoft Windows is still the major player in the OS market for Digital Signage installations. However, Linux is gaining traction and was implemented in 28% of all projects in 2016.

| change DBCI 2017 #2 | *year-on-year* | *previous survey* |
|---|---|---|
| | -61,4% | -46,2% |

# Much more conservative ratings for the current situation and the outlook

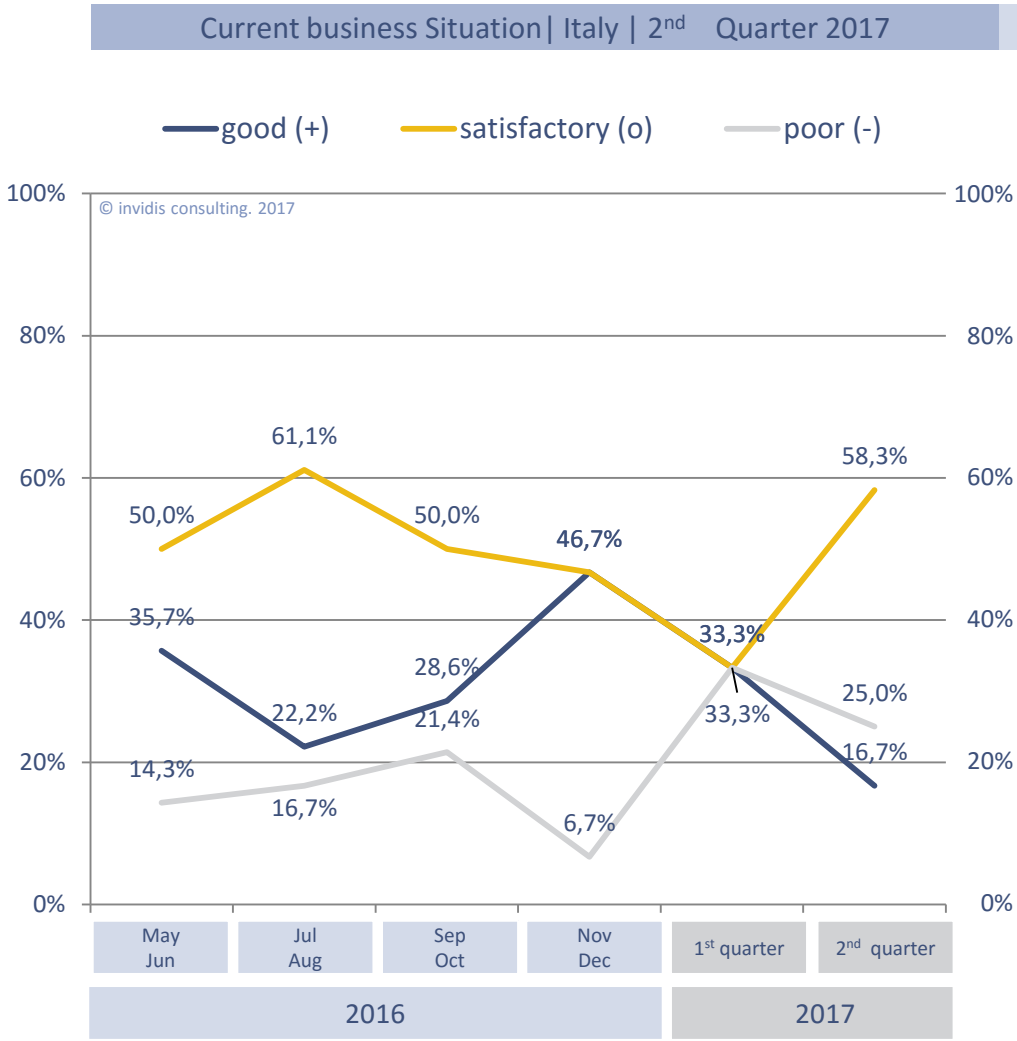


*Fig. 2: DBCI Italy 2nd Quarter 2017 „Business Situation" rolling 12 months, n=12*

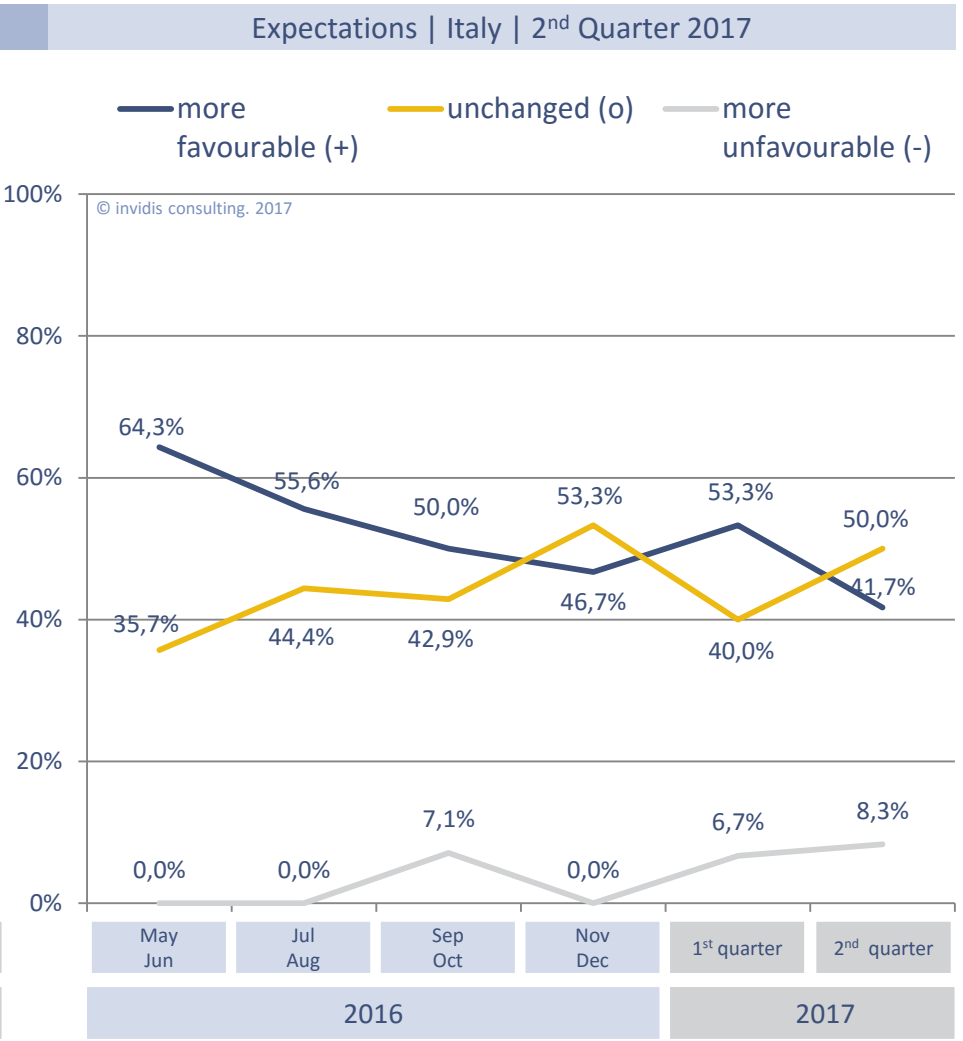


*Fig. 3: DBCI Italy 2nd Quarter 2017 „Expectations" rolling 12 months, n=12*

# OS 2016 | Windows in first and Linux challenges

***Question**: How high was the percentage of operating systems used in Digital Signage Projects in 2016?*

Windows is implemented most frequently with Digital Signage projects. However other operating systems have significantly gained ground in the last two years.

Particularly Linux based installations are becoming consistently more popular. Here cost and security issues are dictating the decisions. With Digital Signage installations becoming more varied in size and required performance, the appliances running on a non-PC architecture like Raspberry Pi, Cisco, BrightSign, Spinetix etc. are more widely integrated.

Also cost effective systems operating on Android basis currently have the highest dynamic in the market. Still many security and performance issues remain.

Apple operating systems could establish a robust nice segment. However, many managers with IT responsibility dismiss it as an operating system for Digital Signage installations.

Market share of IT operating systems in Digital Signage installations 2016

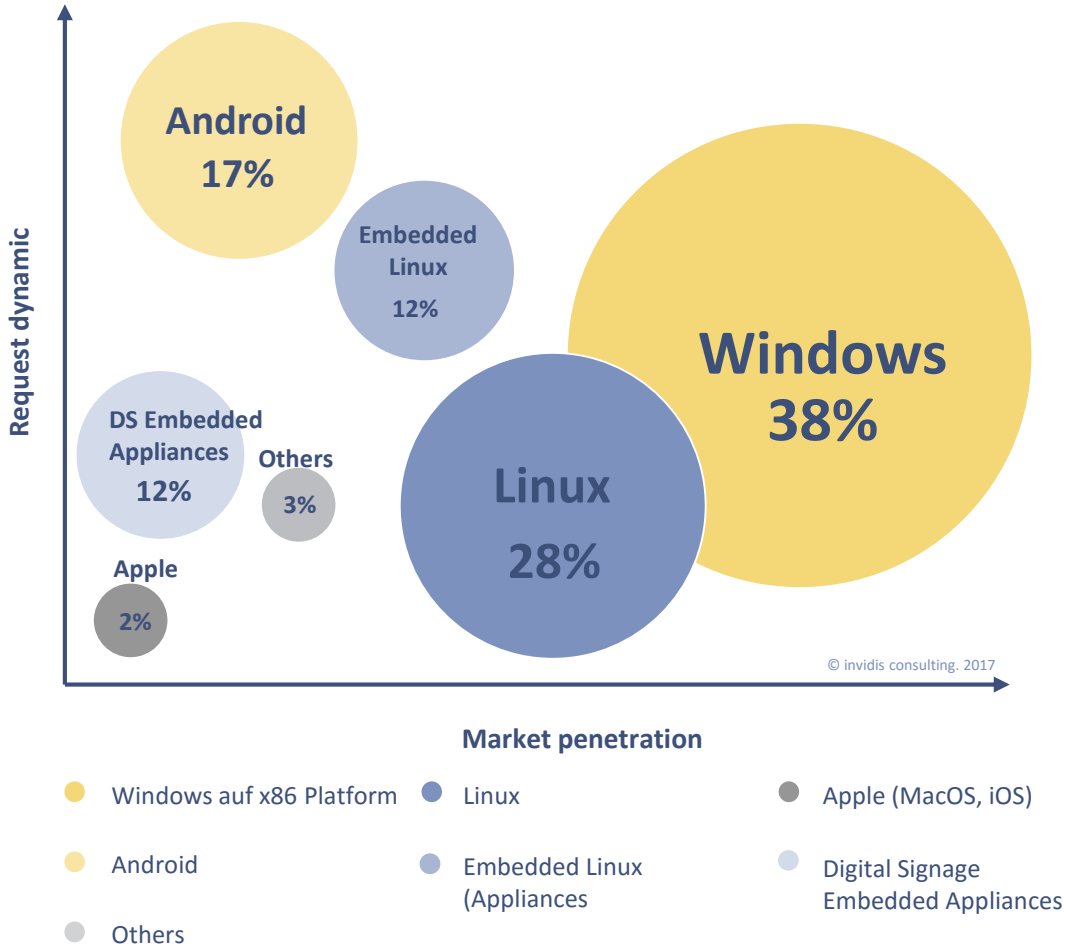


*Fig. 4: DBC IItaly 2nd Quarter 2017 "operating systems 2016", n=11*

# Roadmap 2017 & Contact

| 2017 |
|---|
| January |
| February |
| March |
| April |
| May |
| June |
| July |
| August |
| September |
| October |
| November |
| December |

**3rd quarter | 2017**

**4th quarter | 2017**

- The DBCI has recalibrated its iteration from a two month period to a tree month period starting in 2017
- The next survey will take place in calendar weeks 32-33 of 2017. The next planned publication date will be in September 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

- Join us at one of our upcoming events in
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  - DSS Europe | Munich: 5.-6. July 2017
  - DSS MENA | Dubai: September 2017
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