

May/June 2014

Poland

26<sup>th</sup> of May 2014

# DBCI

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

## The pulse of the Digital Signage and DooH industry



OVAB Europe cooperation partner Poland





## Polish Digital Signage industry with positive business sentiment

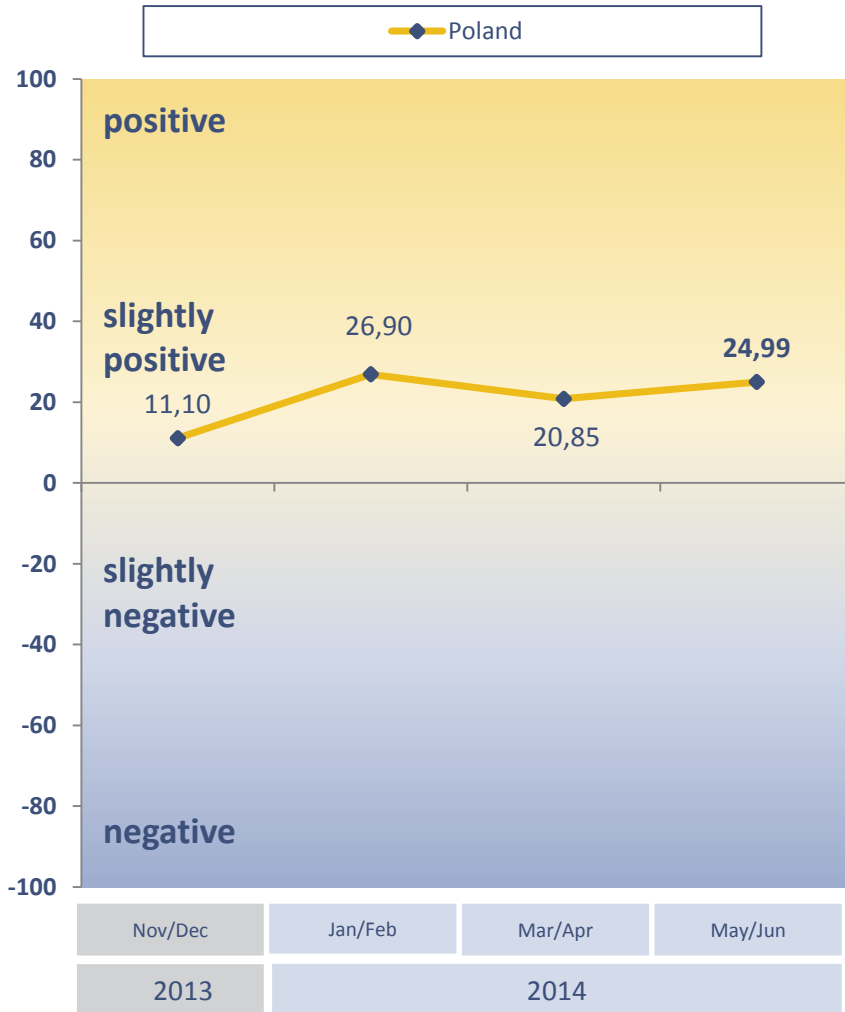


Abb. 1: DBCI May/June2014 „Index Poland“, n=12

- The Digital Signage Business Climate Index (DBCI) in Poland has increased slightly since the last poll in March. The Index grew by 4,14 points and still remains in the “slightly positive” level
- The industry shows an increased satisfaction with the current business situation as 75% of all participants answered with “good” or “satisfactory”
- The expectations for the next six months are very good as 50% of all polled companies see the future “more favorable”
- Currently many pilot installations (e.g. Retail, QSR) give the industry high hopes for tenders in the not so far future while the good recurrent business is still made in the SMB sector
- In 2013 the sales of professional displays almost doubled making Poland one of the top ten markets for Digital Signage in Europe. Here especially price aggressive hardware solutions have had a huge success
- With the general economy further expanding the Digital Signage industry has very positive expectations for the second half-year of 2014

### Survey facts

- Participants: n=12
- Region: Poland
- Time frame: 2014 calendar weeks 19 & 20

 Increased positive business situation

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

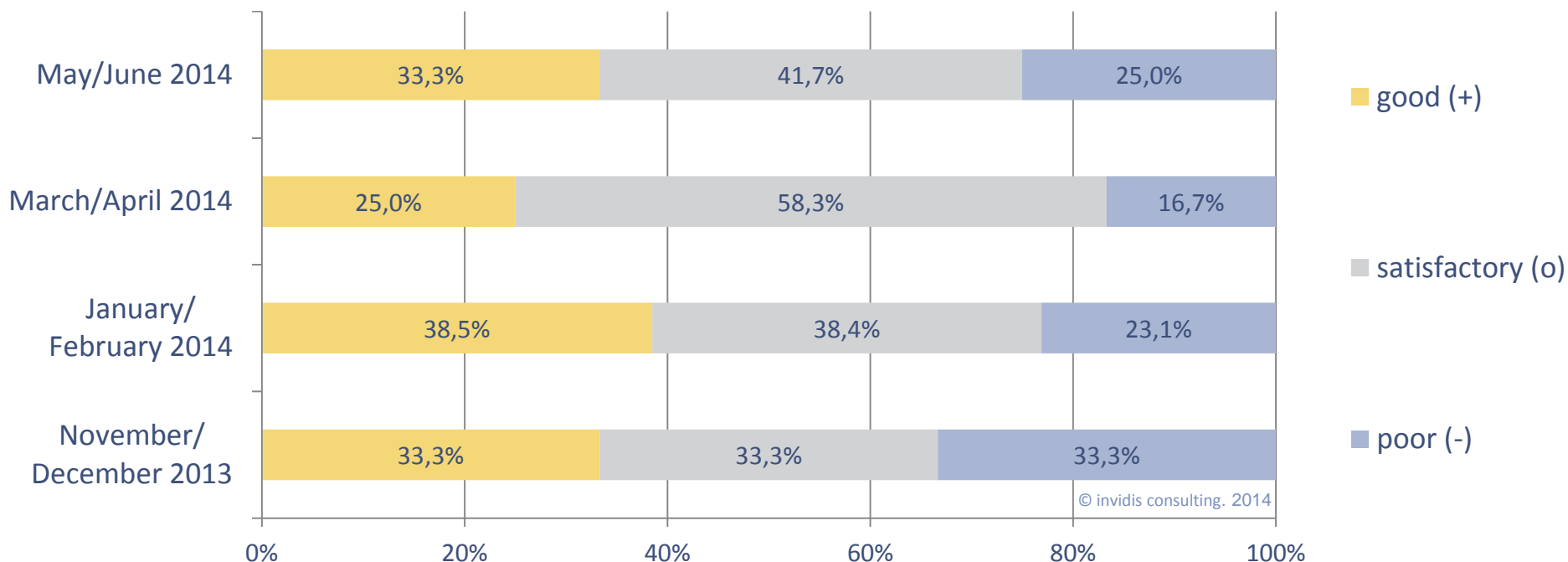


Fig. 2: DBCI Poland May/June 2014 "business situation", n=12



## Positive outlook for the second half-year of 2014

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

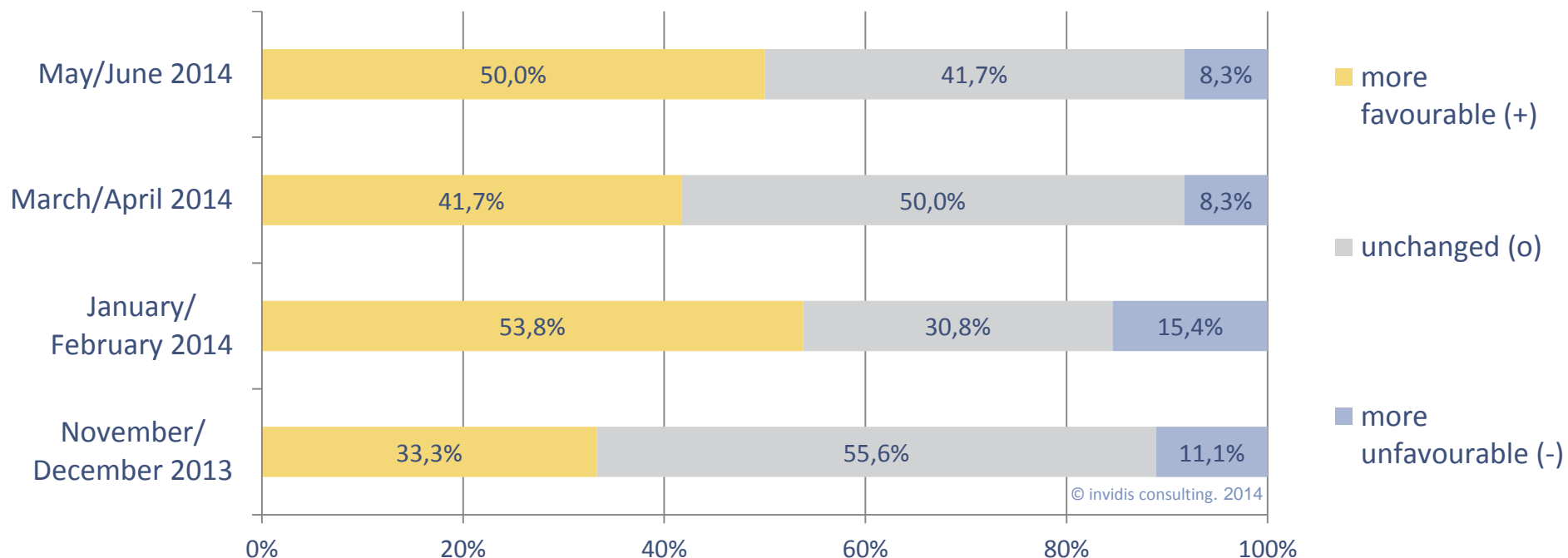


Fig. 3: DBCI Poland May/June 2014 "business expectations", n=12



DBCI May/June 2014

# Additional Questions



## Customer demand | Combination of Digital Signage and audio not yet in demand

**Question:** “How will the customer demand evolve for the combination of Digital Signage and audio (e.g. in-store radio) within the next 12 months?”



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■ strong growth ■ growth ■ remain stable ■ decline ■ strong decline

Fig. 4: DBCI Poland May/June 2014 “customer demand audio”, n=12

- The combination of Digital Signage and audio is still in its infancy. These in Europe traditionally rather separated segments are moving closer to each other driven by new technological innovations. However, approximately 60% of all polled companies see no change or a decline in the customer demand for such solutions
- The customer yet has to see the benefits of a combination of both media. Moreover successful use cases are rare. However this will change in the next 12 to 18 months



Source: Barix



Source: echion



## Customer demand | High demand for the integration of mobile devices

**Question:** “How will the customer demand evolve for the integration of mobile devices in Digital Signage installations (e.g. Tablets) within the next 12 months?”



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■ strong growth ■ growth ■ remain stable ■ decline ■ strong decline

Fig. 5: DBCI Poland May/June 2014 “customer demand mobile integration”, n=12

- The integration of mobile devices will be a hot topic in the Digital Signage industry in Poland within the next 12 to 18 months. Almost 70% of all polled companies see a growing demand from the customer for this solution
- Particularly for a direct customer engagement at the POS like in banks or car dealers more and more mobile devices are integrated in existing Digital Signage systems and for new projects they are already factored in before the system is rolled out
- However the creation of multi channel content still is a demanding issue for all players involved



Source: Wincor



Source: Wincor



# Customer demand | The trend goes to interactive solutions at the POS

**Question:** “How will the customer demand evolve for Interactive Digital Signage solutions at the POS within the next 12 months?”



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■ strong growth ■ growth ■ remain stable ■ decline ■ strong decline

Fig. 6: DBCI Poland May/June 2014 “customer demand interactive POS solutions”, n=12

- Interactive Digital Signage installations at the POS will be in high demand from customers in the next 12 months. Almost 70% of the survey participants see good potential for growth in this sector
- In Retail the still most important vertical market for Digital Signage the trend is moving from only depictive systems to installations that will engage the customer directly and make the shopping experience more entertaining



Source: xplace



Source: Globus





## DooH gross revenues | Good Q1 and even better expectations for the full year

**Question:** “How did the gross advertising spendings develop in the first quarter of 2014 compared to the same period in the previous year and how will the full year turn out to be ?”

- The first quarter in 2014 was very positive for the Digital-out-of-Home market in Poland. 55% of the surveyed companies (media owners, agencies and marketers) have registered a growth in gross revenues compared to the same period in the previous year.
- Even more market participants are calculating with a growth in gross revenues for the full year 2014
- Moreover non of the polled companies has registered a decline in revenues or is expecting one
- The booming polish economy with an estimated year-on-year growth in GDP of 3% gives many consumers money to spend and with the digital advertising sector growing consistently new inventory for video is in high demand

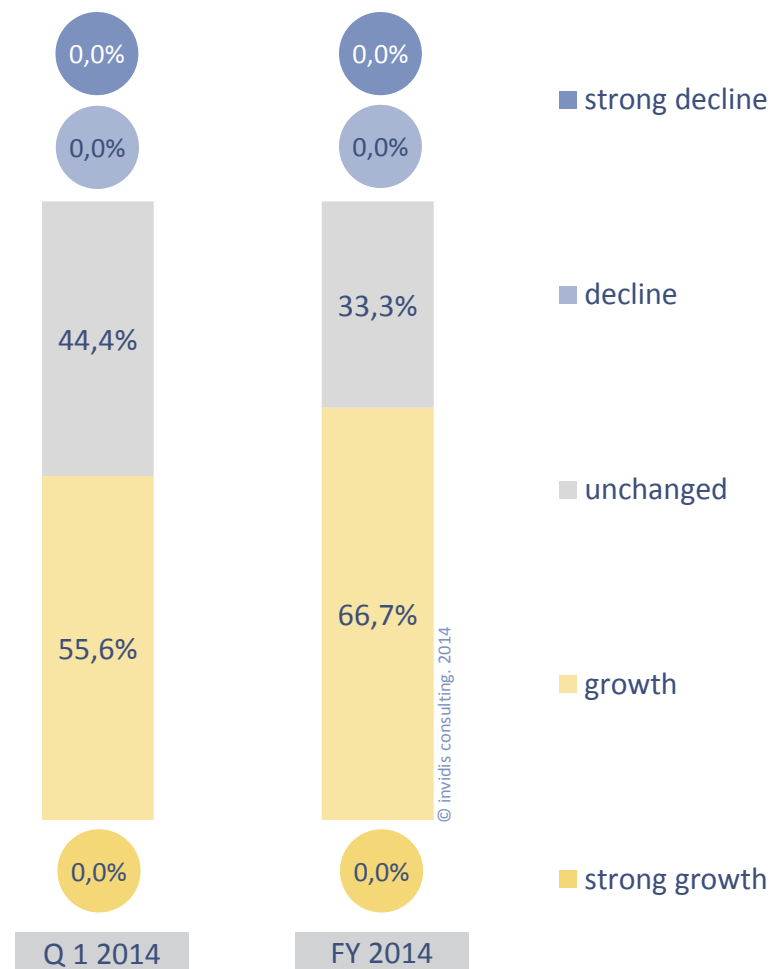


Fig. 7: DBCI Poland May/June 2014 “gross advertising revenues”, n=9



## Roadmap 2014 & Contact

<b>2013</b>	
January	
February	
March	
April	
Mai	
Jun	
July	← <b>Jul./Aug.   28.07.</b>
August	
September	← <b>Sep./Oct.   18.09.</b>
October	
November	← <b>Nov./Dec.   24.11.</b>
December	

- The next survey will take place in calendar weeks 28 & 29 of 2014.
- The next planned publication date will be the 28<sup>nd</sup> July 2014.
- 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 2014. For further information please contact Daniel Russell.

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# digital signage

## 8th MUNICH CONFERENCE

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17. - 18. September  
2014

