

Poland

September | October 2014

DBCI

The pulse of the Digital Signage
and DooH industry

OVAB Digital Signage & DooH
Business Climate Index

OVAB Europe cooperation partner Poland



**POLISH
DIGITAL
SIGNAGE
ASSOCIATION**



invidis research
2014 PL 500



Political situation effects volatile business sentiment



Abb. 1: DBCI September | October 2014 „Index Poland“, n=12

- The Digital Signage Business Climate Index (DBCI) in Poland has strongly declined since the last poll in July. The Index fell by 25,02 base points yet it remains in the “slightly positive” level
- The decline in expectations comes at odds with the most recently announced GDP growth figures. In the first quarter of the year the economy has grown by 3.1 per cent (yoy) which marks the largest growth in two years.
- At the same time, the Polish economic climate has reacted badly on the current crisis in Urania and also on the recently surprising ban on its fruits and vegetables exports to Russia.

Further Research

- The Digital Signage Market in Poland has registered growing revenues in the first six months of 2014 compared to the same period in the previous year
- Also a clear year-on-year increase in revenues is expected for the full year 2014. Most market participants who suffered losses or had no growth in the first six months predict to contain the losses and even register growth until the end of the year

- Participants: n=12
- Region: Poland
- Time frame: 2014 calendar weeks 35 & 36



Current business sentiment clear satisfactory

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

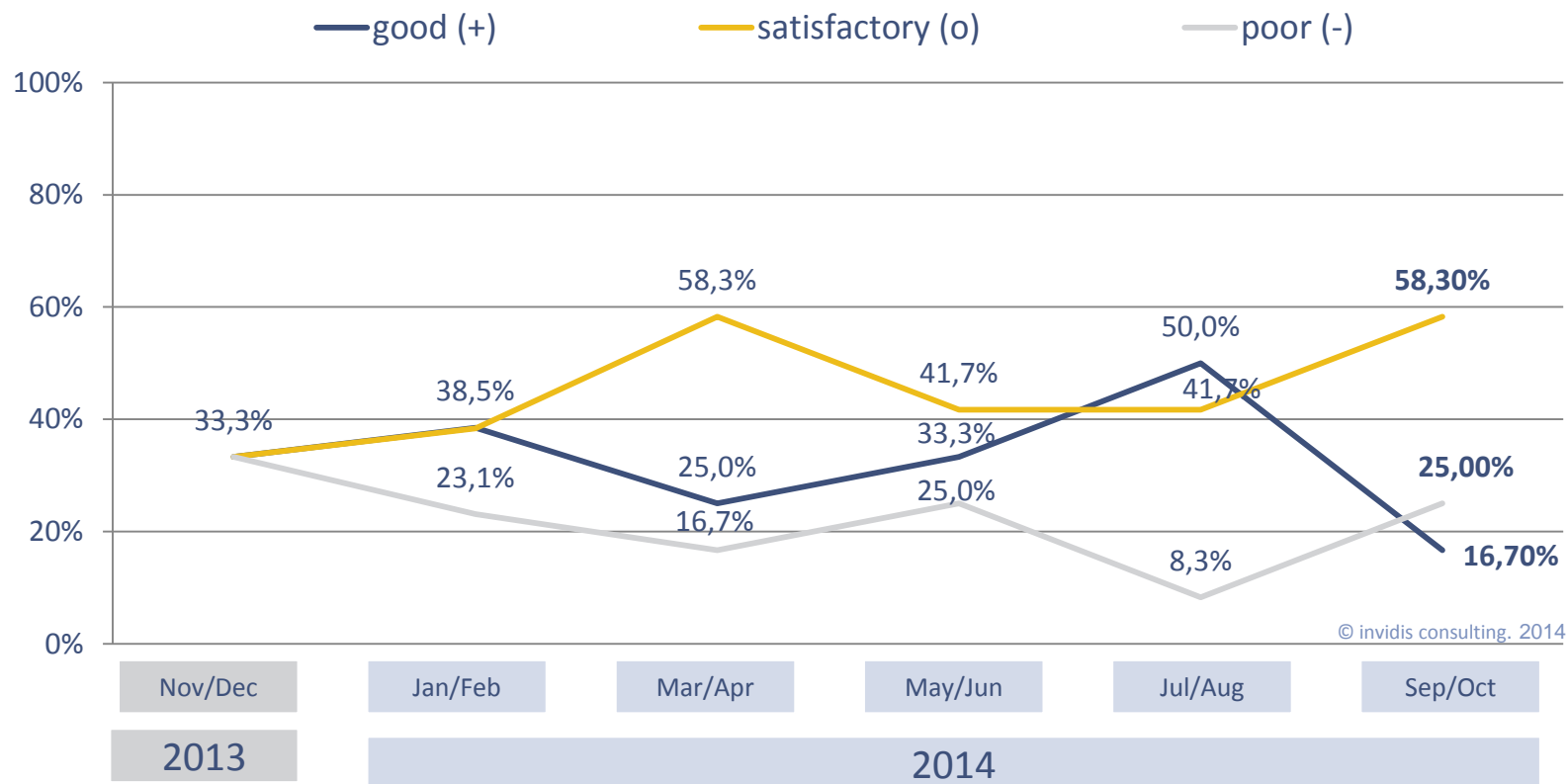


Fig. 2: DBCI Poland September | October 2014 "business situation", n=12



Slightly more conservative expectations

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

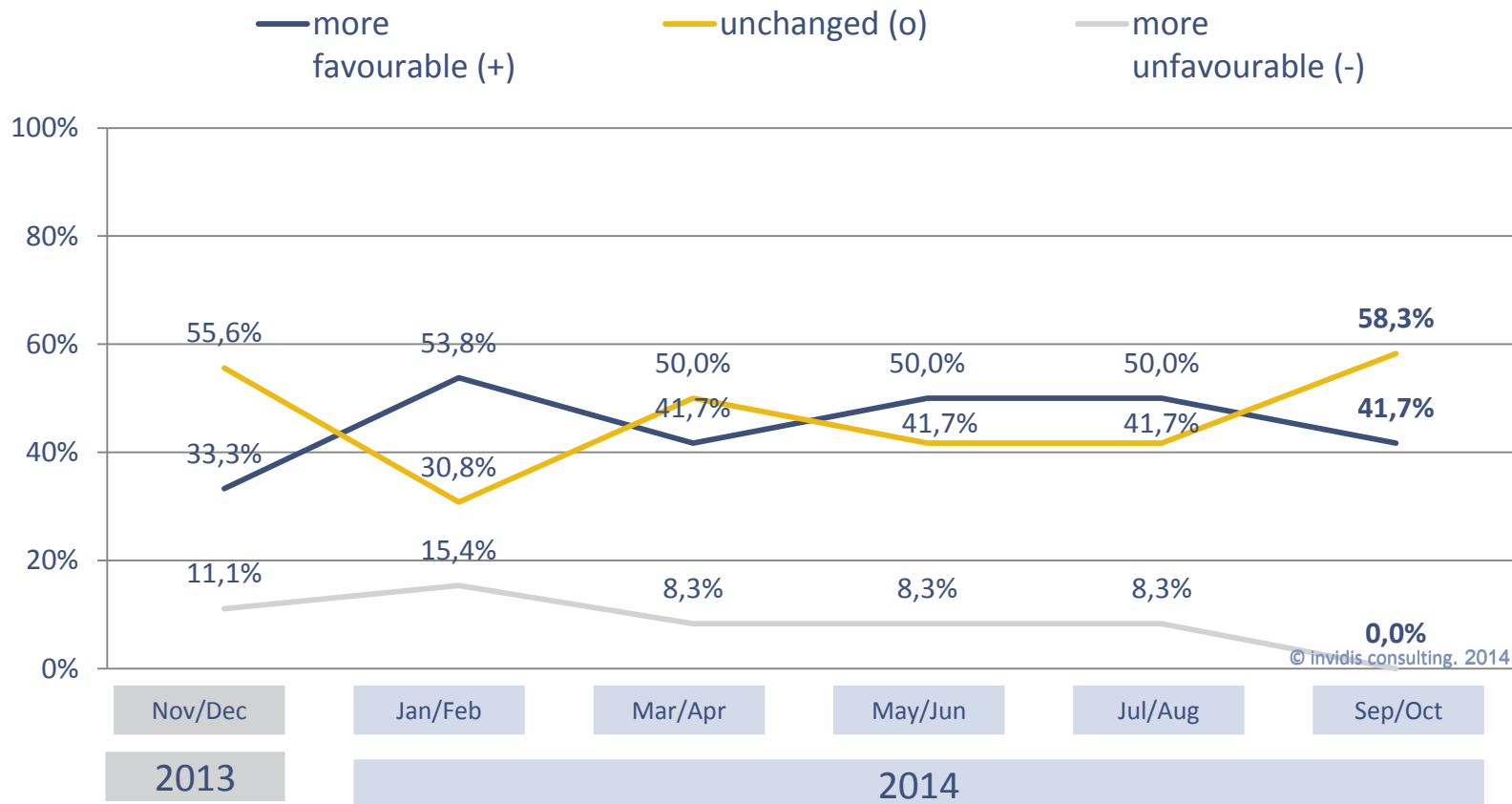


Fig. 3: DBCI Poland September | October 2014 "business expectations", n=12



Positive business sentiment dominates in all markets in Europe

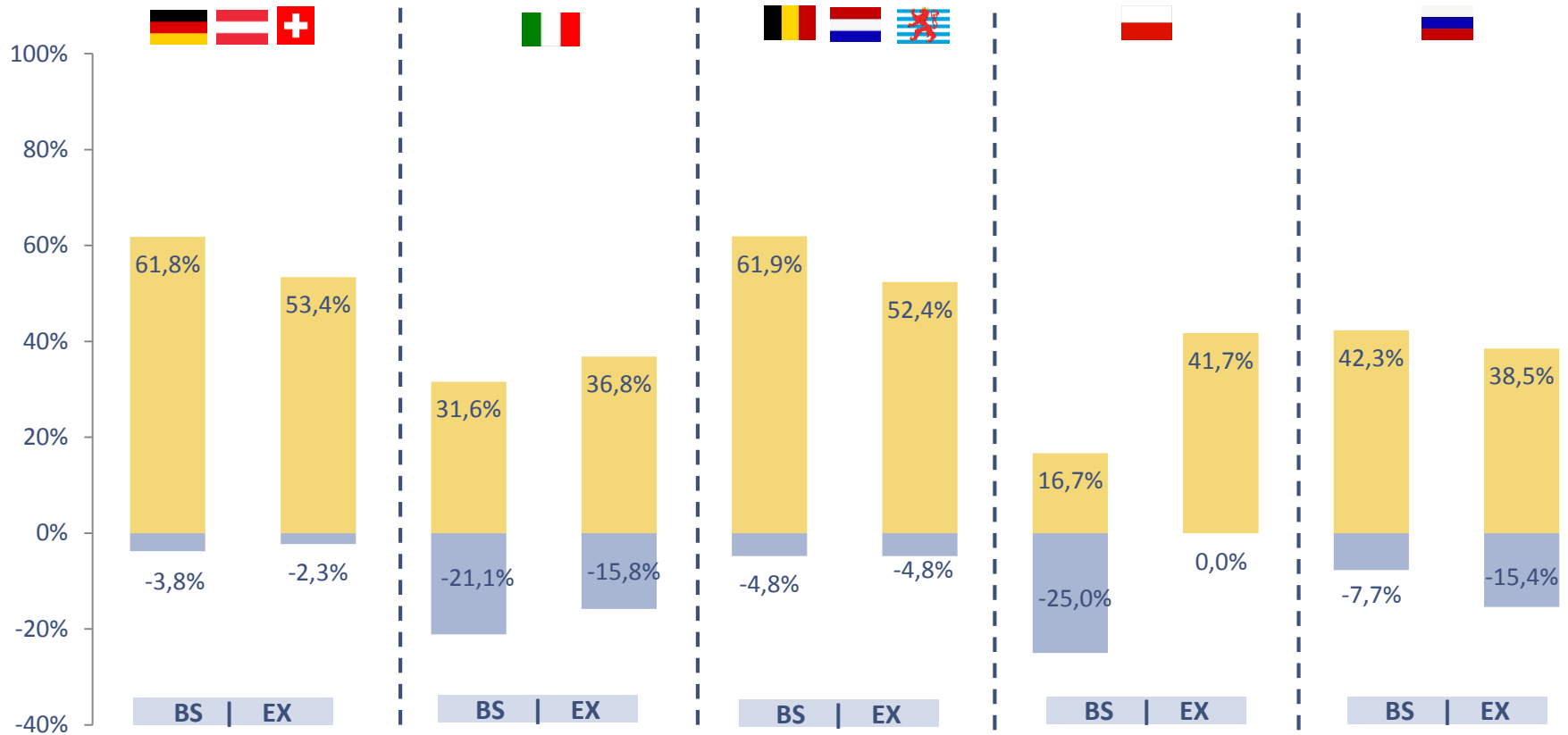


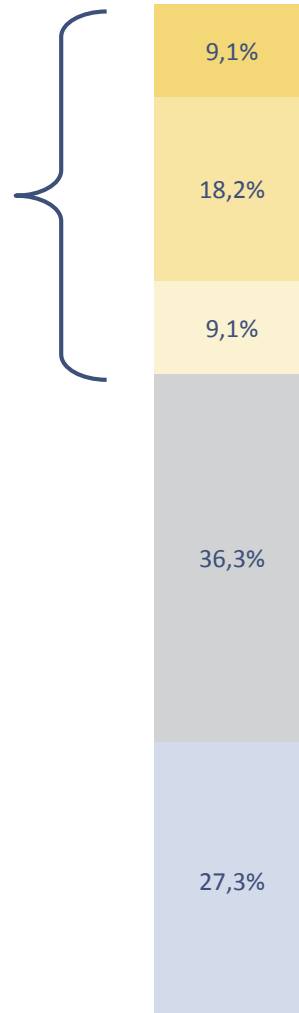
Fig. 4: DBCI September | October 2014 „Business Situation and Expectations Europe“
*) BS: Business Situation; EX: Expectations



Only slow growth in revenues in the first semester 2014

Only **36,4%** of all polled companies could generate in parts a clear **increase in revenues** in the first half year term in 2014 compared to the same period in the previous year

27,3% of all polled companies had to accept a **decrease in revenues** compared to the previous year



“The revenues in the first half year 2014 have ... in comparison to the revenues of the same period in the previous year.”

Legend

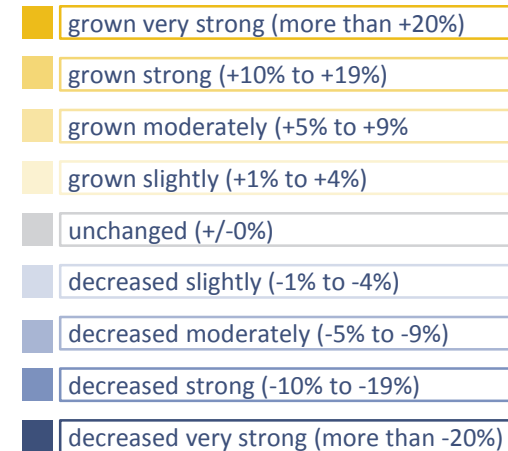


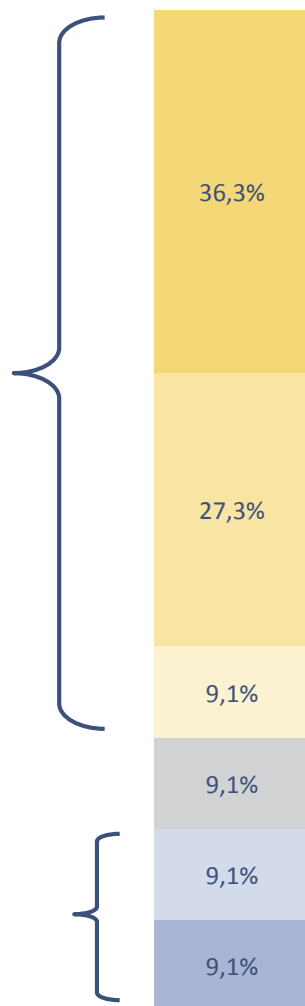
Fig. 5: DBCI September/October 2014 “revenues H1 2013-2014”, n=11



Increase in revenues expected for the full year 2014

72,8% of all polled companies are expecting a healthy **growth** in **revenues** for the year 2014 compared with the previous year

Only **18,2%** of all polled companies expect a **decrease** in **revenues** compared to the pervious year



“The revenues in 2014 will ... compared to the revenues in 2013.”

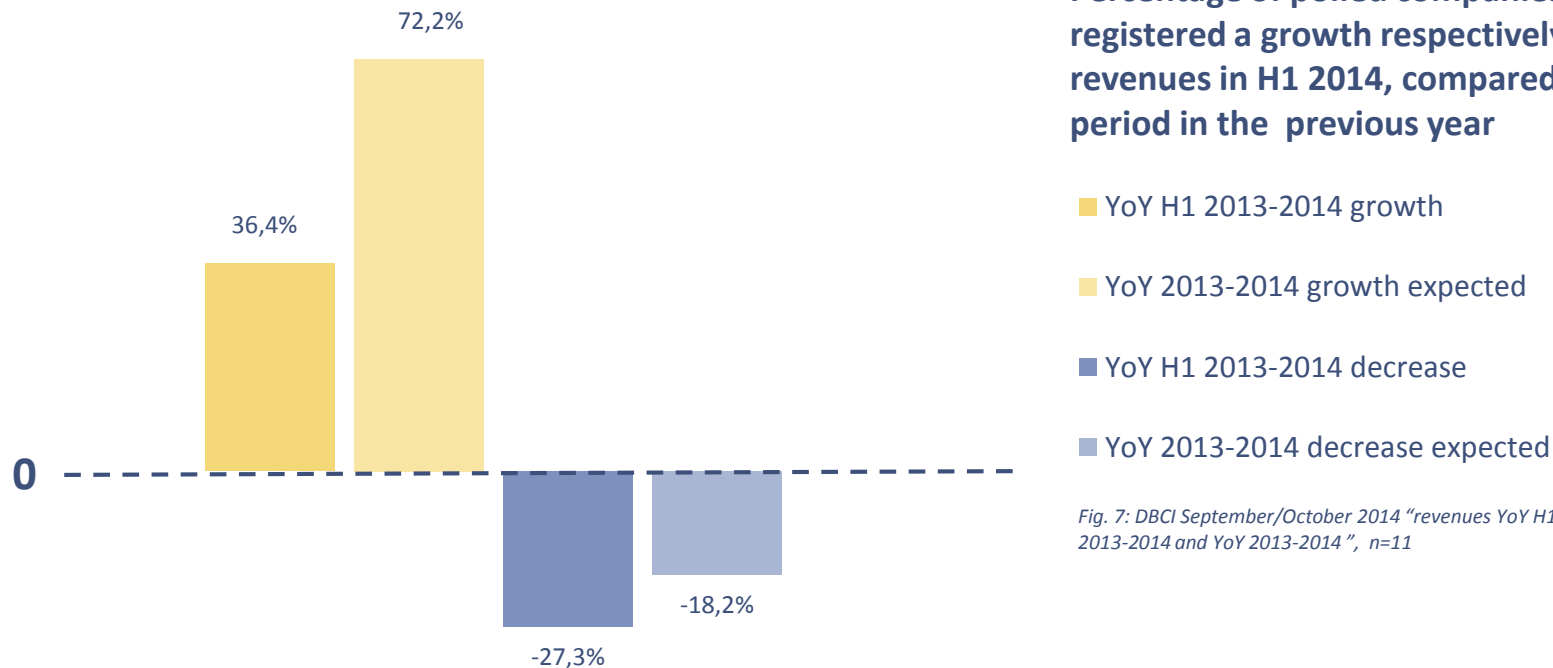
Legend

- grow very strong (more than +20%)
- grow strong (+10% to +19%)
- grow moderately (+5% to +9%)
- grow slightly(+1% to +4%)
- stay unchanged (+/-0%)
- decrease slightly (-1% to -4%)
- decrease moderately (-5% to -9%)
- decrease strong (-10% to -19%)
- decrease very strong (more than -20%)

Fig. 6: DBCI September/October 2014 “expectation revenues YoY 2013-2014”, n=11



H1 losses expected to be partially contained in H2



Percentage of polled companies which have registered a growth respectively a decline in revenues in H1 2014, compared to the same period in the previous year

- YoY H1 2013-2014 growth
- YoY 2013-2014 growth expected
- YoY H1 2013-2014 decrease
- YoY 2013-2014 decrease expected

Fig. 7: DBCI September/October 2014 "revenues YoY H1 2013-2014 and YoY 2013-2014", n=11

- 36,4% of the polled companies in Poland expect to have a growth in revenues in 2014 compared to 2013
- Still 27,3% of all polled companies had to accept a decline in revenues in the first six months of 2014 . However many of those companies are expecting to have balance the losses at the end of the year
- Traditionally the IT business has a relative calm period in the summer, followed by a strong showing towards the end of the year



Growth in H1 revenues and full year expected revenues in Europe

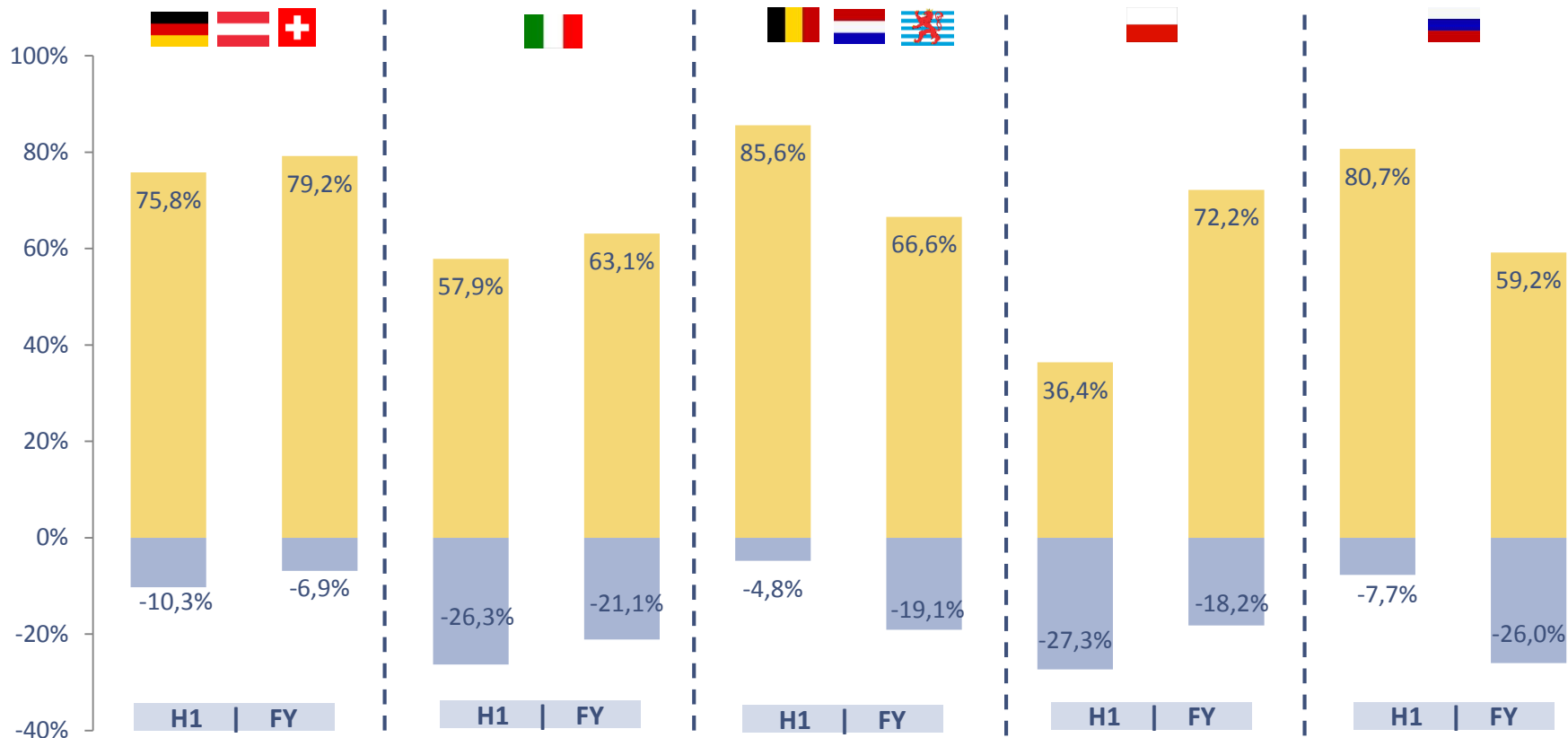


Fig. 8: DBCI September | October 2014 „Revenues H1 & FY Europe“
*) H1: First semester/half year period; FY: Full year



Roadmap 2014 & Contact

- The next survey will take place in calendar weeks 45-46 of 2014.
- The next planned publication date will be the 24th of November 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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| 2014 |
| January |
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| Mai |
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| August |
| September |
| October |
| November |
| December |

← **Nov./Dec. | 24.11.**