Poland

September | October 2015

DBCI

Digital Signage & DooH Business Climate Index

The pulse of the Digital Signage and DooH industry

OVAB Europe cooperation partner Poland

invidis research
2015 PL 500

Digital Signage market back on upwards trend

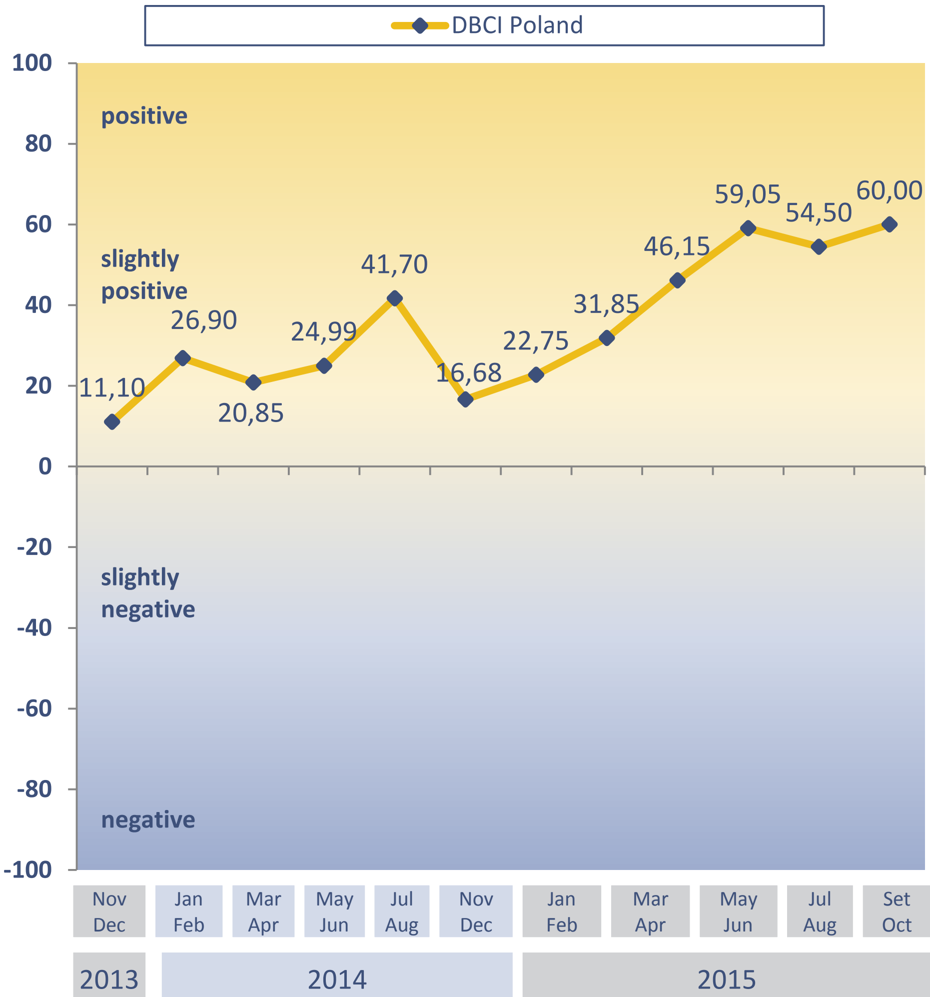


Abb. 1: DBCI Poland September | October 2015 „Index“, n=10

- Since the last survey in August 2015 the Digital Signage Business Climate Index in Poland has increased by 5,50 base points from 54,50 base points to 60,00 base points.
- The current business situation has further brighten up and increased by 5% reaching a 24 month high. The cautious situation at the start of the summer has changed, as new impulses by the robust reaction of the Polish economy to global economic challenges have calmed the market
- The optimism towards the near future also saw good growth. As 70% of all polled companies expect a *more favourable* situation for their business within the next six months.

Further Research

- Almost 80% of the polled companies in Poland expect to have a growth in revenues in 2015 compared to 2014
- Still 11,1% of all polled companies had to accept a decline in revenues in the first six months of 2015.
- However some of those companies that didn’t see increasing revenues in the first semester 2015 are expecting to have more business until the end of the year

Participants: n=10; Region: PL; Survey Period: 2015 calendar weeks 35-36

Status Quo | Current business situation continues positive trend

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

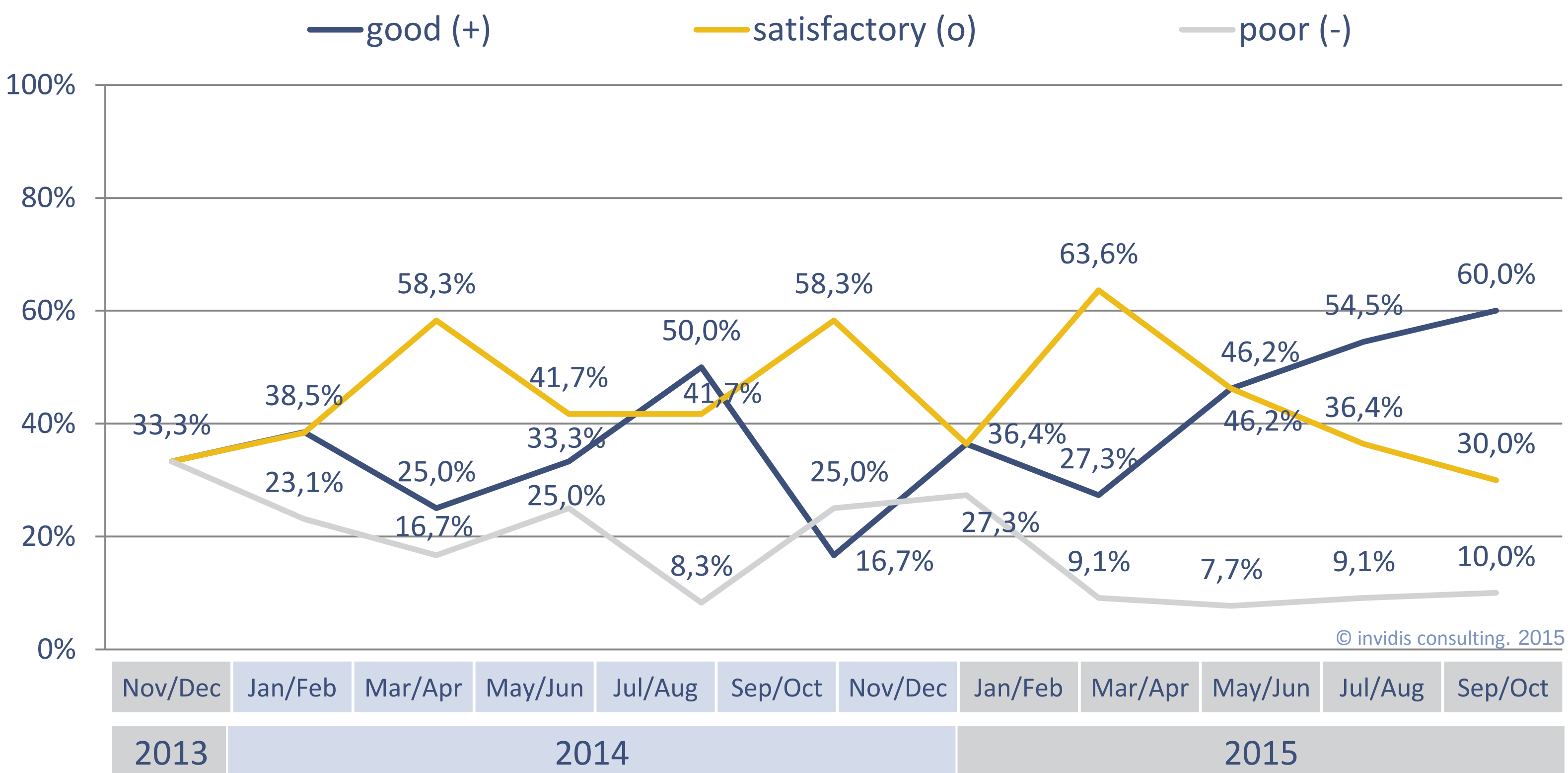


Fig. 2: DBCI Poland September | October 2015 “business situation”, n=10

Expectations | Outlook for the near future is again very positive

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

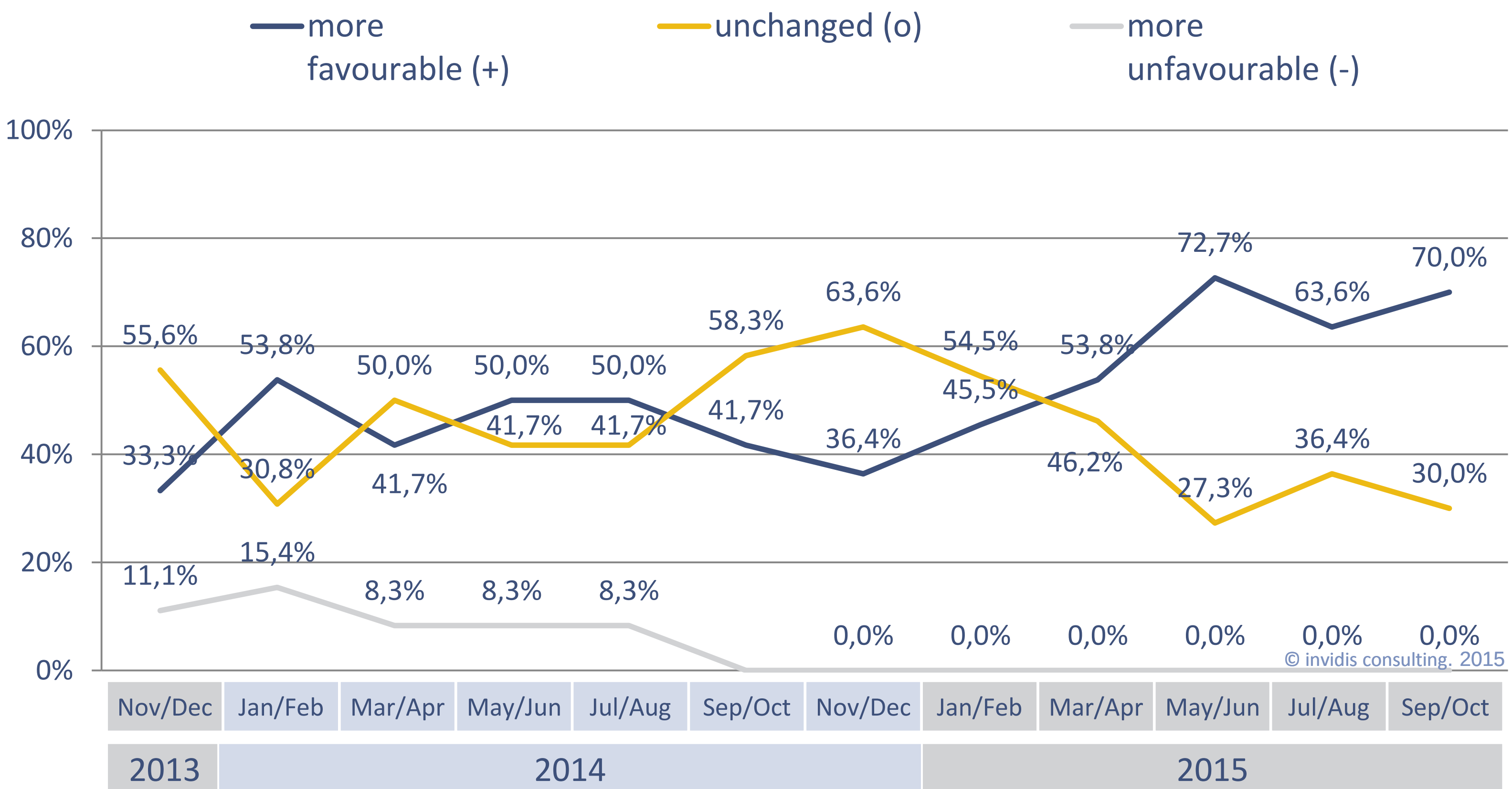


Fig. 3: DBCI Poland September | October 2015 "business expectations", n=10

Further research| First semester 2015 with considerably higher revenues than 2014

"The revenues in the first half year 2015 have … in comparison to the revenues of the same period in the previous year."

66,6% of all polled companies could generate in parts a clear increase in revenues in the first half year term in 2015 compared to the same period in the previous year

Only 11,1% of all polled companies had to accept a decrease in revenues compared to the previous year

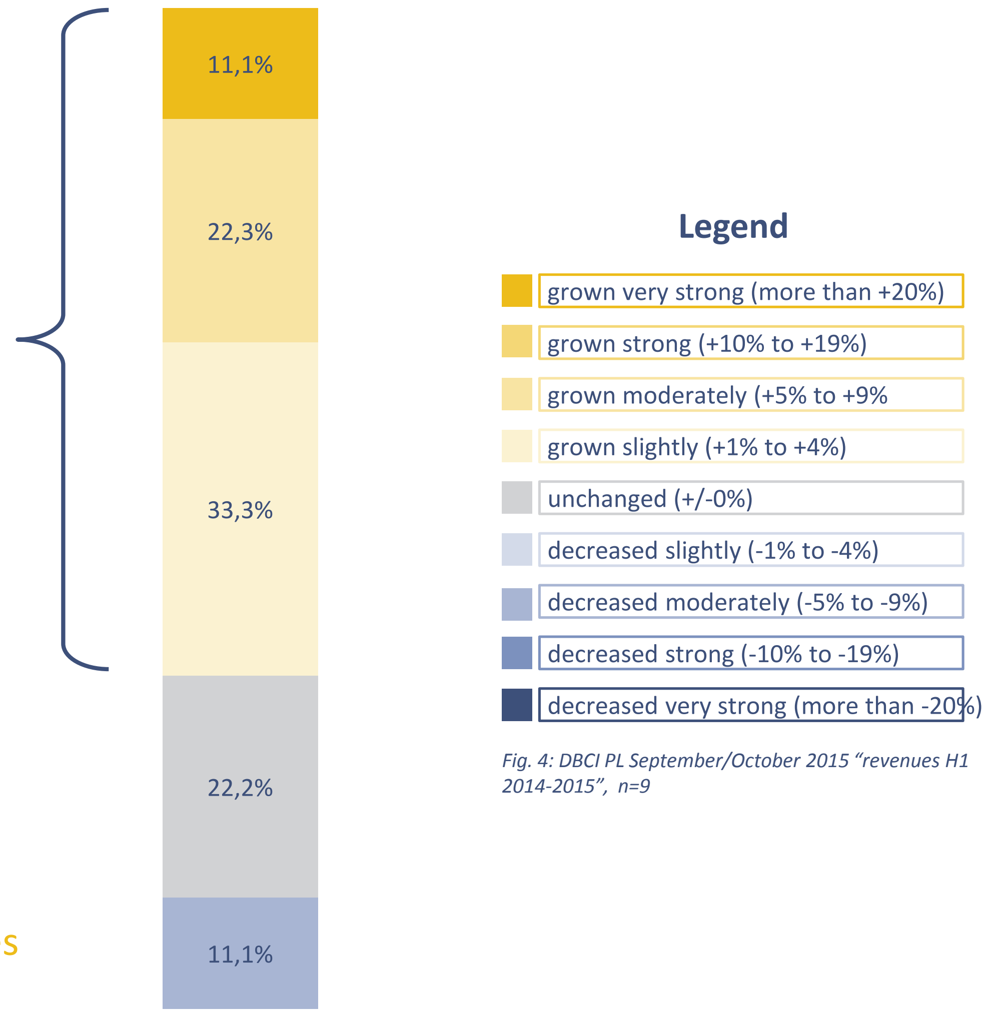


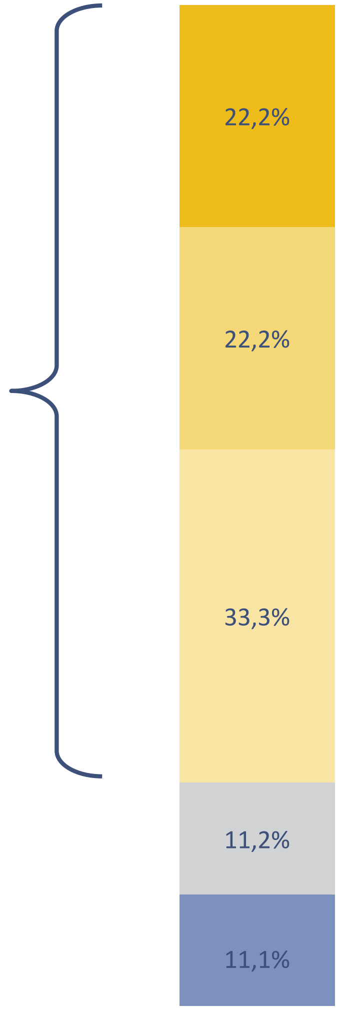
Fig. 4: DBCI PL September/October 2015 "revenues H1 2014-2015", n=9

Further research | Clear increase in revenues expected for the full year 2015

"The revenues in 2015 will … compared to the revenues in 2014."

77,7% of all polled companies are expecting a healthy growth in revenues for the year 2015 compared with the previous year

Only 11,1% of all polled companies expect a decrease in revenues compared to the pervious year

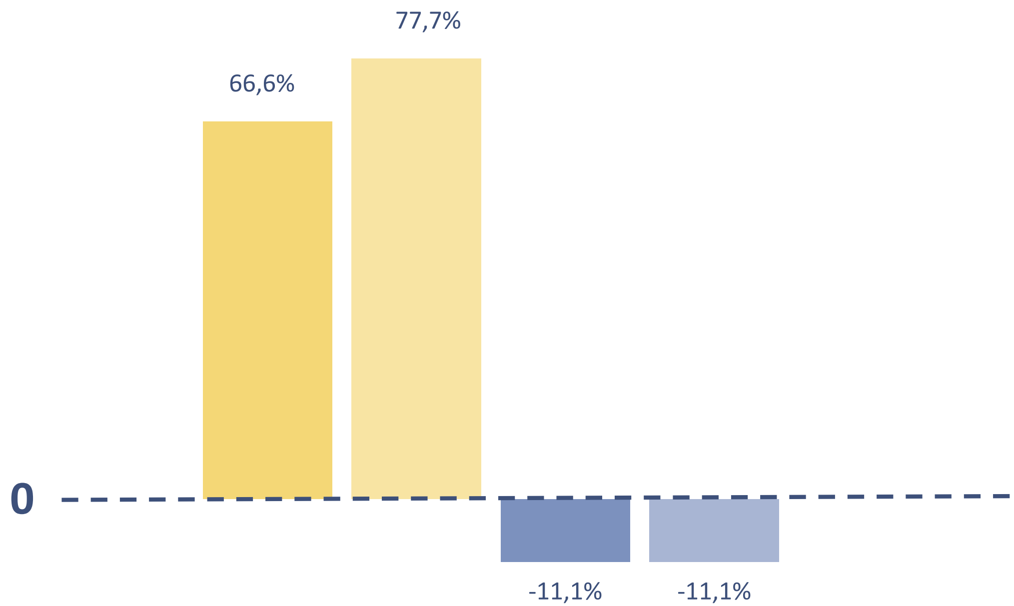


Legend

- 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. 5: DBCI PL September/October 2015 "expectation revenues YoY 2014-2015", n=9

Further research | Further increase of revenues expected in the second semester



Percentage of polled companies which have registered a growth respectively a decline in revenues in H1 2015 and FY 2015, compared to the same period in the previous year

- YoY H1 2014-2015 growth
- YoY 2014-2015 growth expected
- YoY H1 2014-2015 decrease
- YoY 2014-2015 decrease expected

Fig. 6: DBCI PL September/October 2015 "revenues YoY H1 2014-2015 and YoY 2014-2015 ", n=9

- Almost 80% of the polled companies in Poland expect to have a growth in revenues in 2015 compared to 2014
- Still 11,1% of all polled companies had to accept a decline in revenues in the first six months of 2015. The same percentage expects to register declining revenues compared with 2014 at the end of the year. However some of those companies that didn't see increasing revenues in the first semester 2015 are expecting to have more business until 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

DBCI | Roadmap 2015 & Contact

2015
January
February
March
April
May
June
July
August
September
October
November
December

Nov./Dec. | 2015/11/30

- The next survey will take place in calendar week 45-46 of 2015
- The next planned publication date will be the 30th of November 2015
- 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 2015. For further information please contact Daniel Russell

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