

Poland
November | December
2015

DBCI

The pulse of the Digital Signage
and DooH industry

OVAB Digital Signage & DooH
Business Climate Index

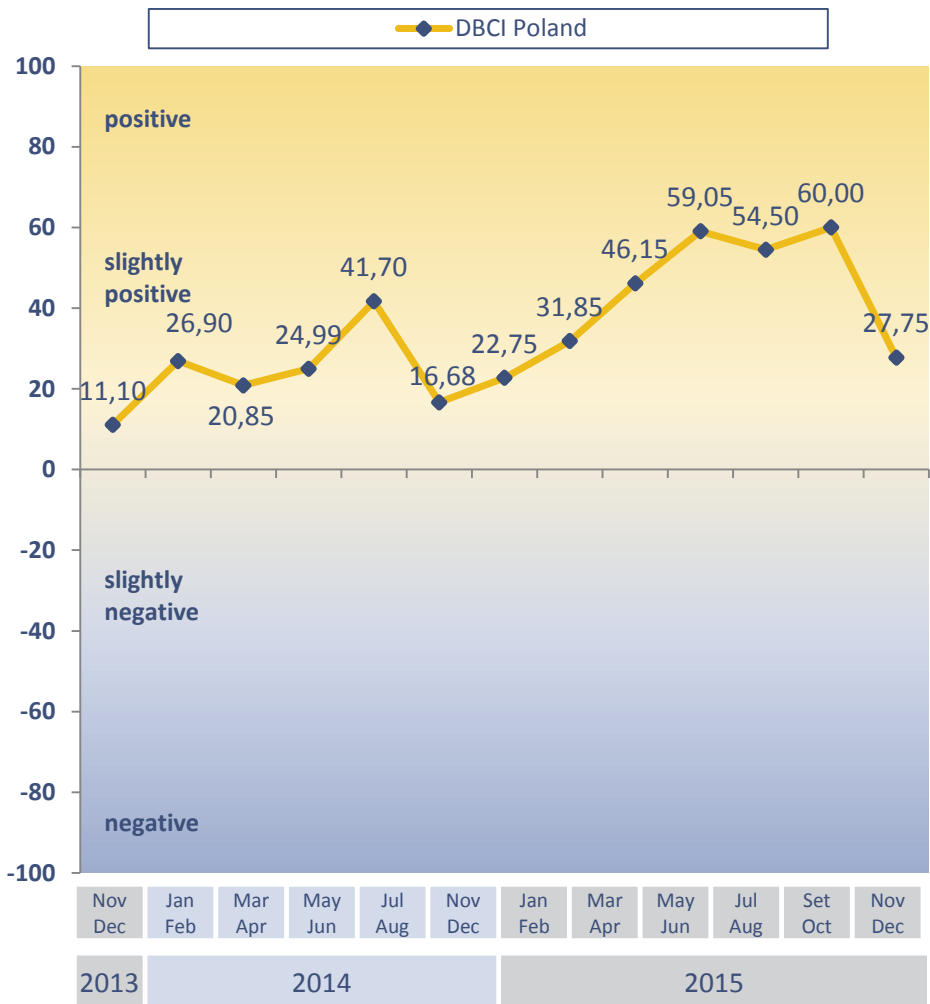
OVAB Europe cooperation partner Poland



invidis research
2015 PL 600



Digital Signage market sees strong correction at the end of the year



- The digital Signage Business Climate Index Poland has decreased strongly. It fell by 32,94 base points from 60,00 base points to 27,75 base points.
- The decline of the index has been definite. However, it still is well in the *positive* region of the scale. As over 80% of the market participants are still satisfied or happy with their current business situation
- At the same time the optimism towards the near future has seen a clear decline since the last survey. Yet still almost 40% of all polled companies expect a *more favourable* situation for their products and services in the Digital Signage and Digital out of Home market within the next six months.

Further Research

- The market leaders among the distributors in Poland are Veracomp, ABC Data and Action. Between 35% and 75% of the market participants have worked with those competitors.
- 75% of the DooH market has seen a rise in bookings in the current year. The overall market is expected to register a healthy increase in the number of advertising booked in 2015

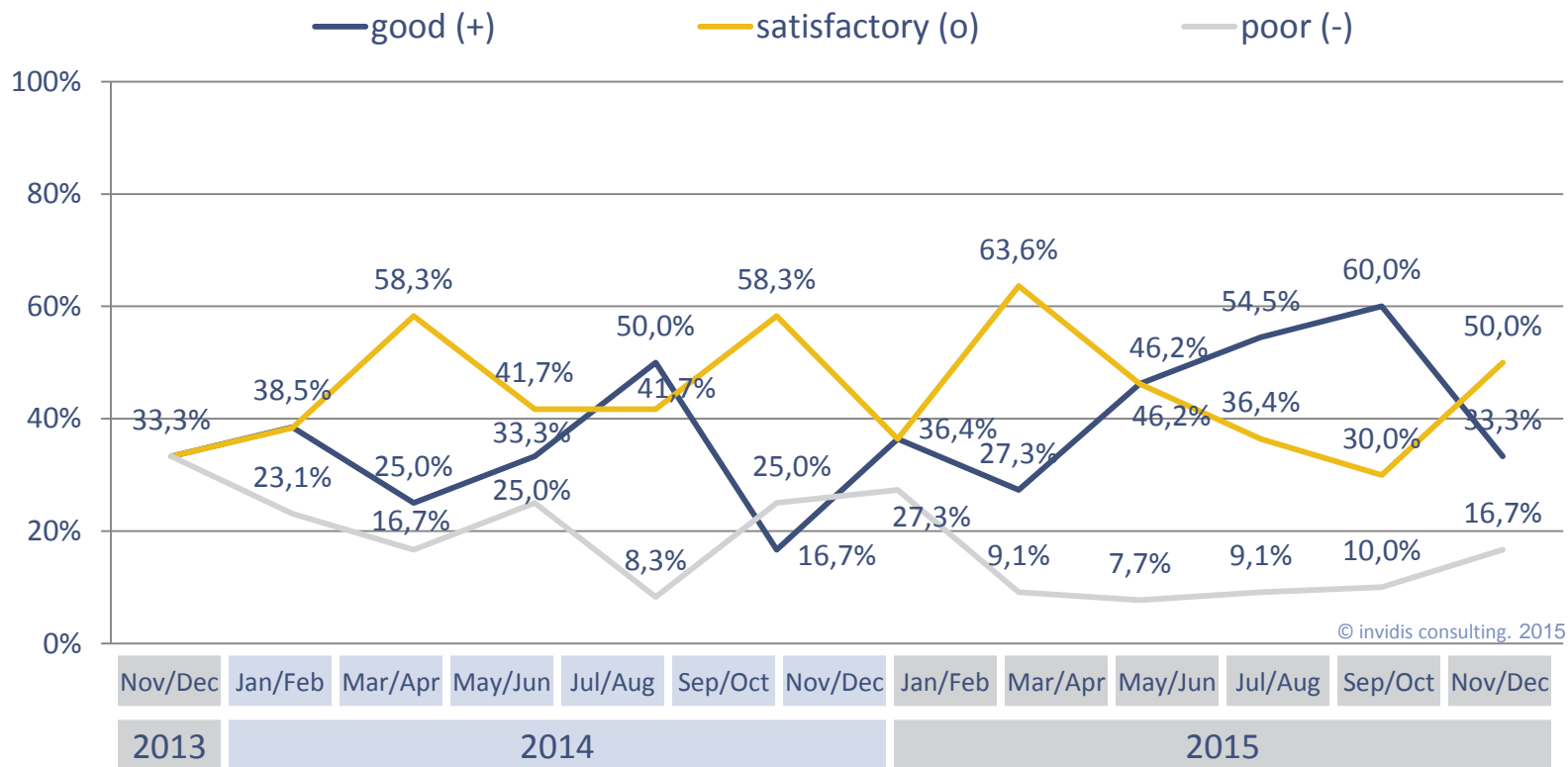
Participants: n=18; Region: PL; Survey Period: 2015 calendar weeks 46-47

Fig. 1: DBCI Poland November | December 2015 „Index“, n=18



Status Quo | Prevailing satisfaction with the current business situation

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



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Fig. 2: DBCI Poland November | December 2015 "business situation", n=18



Expectations | Outlook for the near future is much more conservative

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

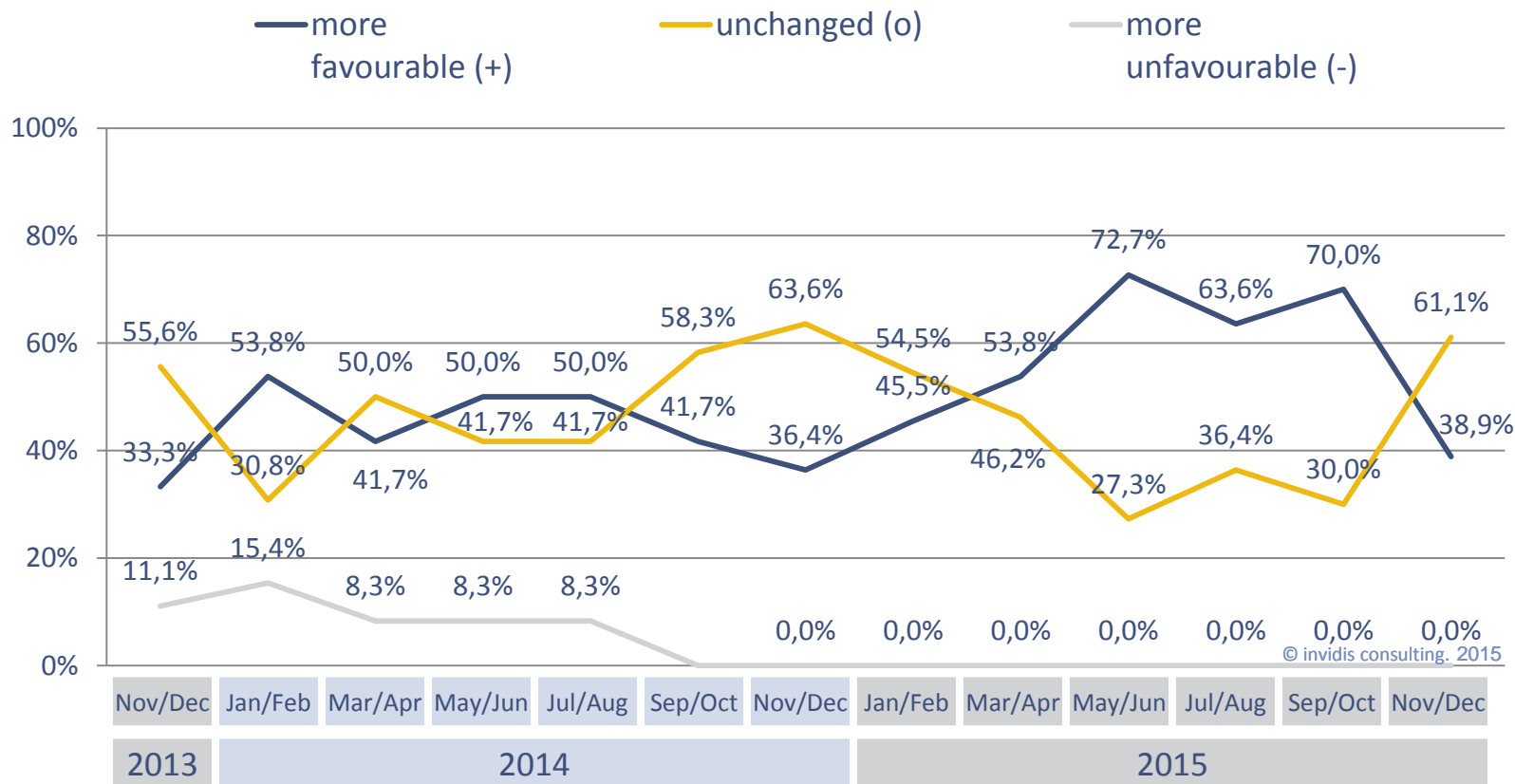


Fig. 3: DBCI Poland November | December 2015 "business expectations", n=18



Further research | The market is dominated by local champion Veracomp

Question: „With which distributors do you work together?“

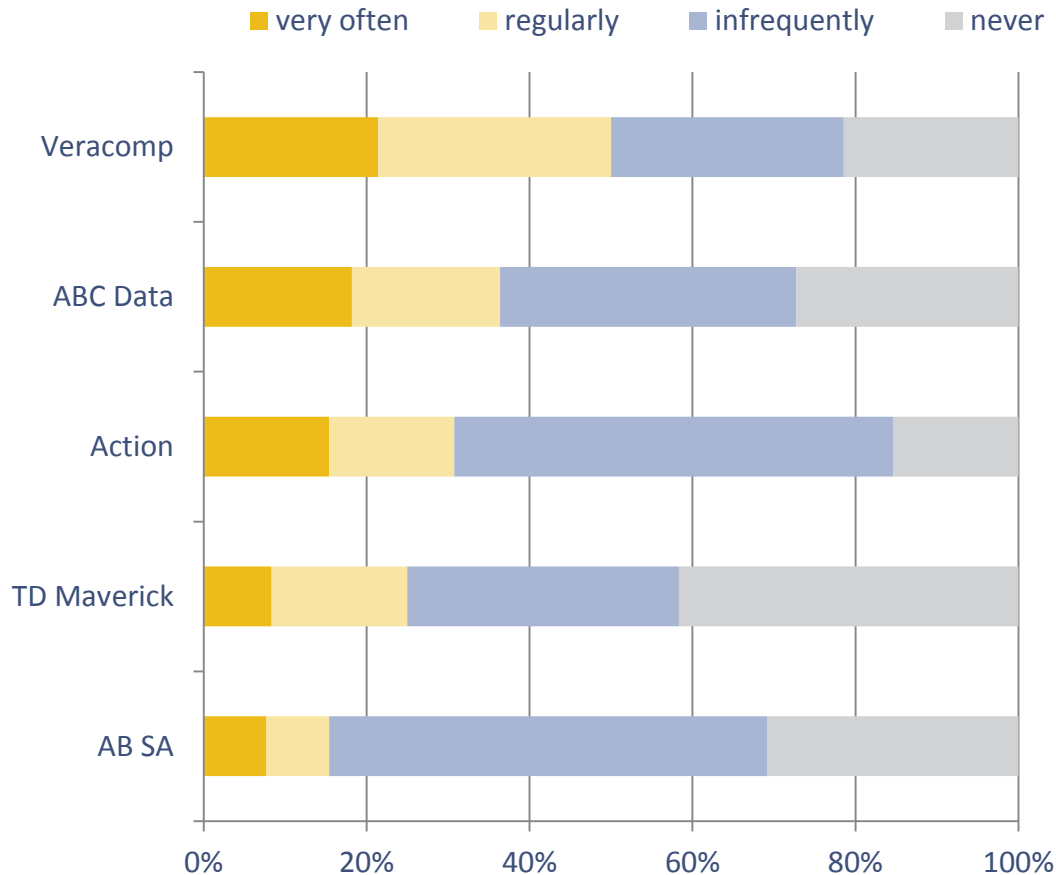


Fig. 4: DBCI Poland November/December 2015 “ranking distributors”, n=13 (mean value)

- The market leader among the distributors in Poland is Veracomp. Approximately half of all polled companies work with this distributor on a regular basis.
- In many other countries a local champion plays an important role in the market for distributors. In France it is SIDEV, in Germany Delo and in Switzerland MobilePro.
- In short succession follow the other distributors ABC Data, Action, TD Maverick and AB SA. Between 20% and 40% of the market participants have worked with those competitors.
- Most IT distributors offer Digital Signage related services. The market participants have noted that DS projects offer a good possibility to generate additional revenues to the standard box-moving business.



Further research | DooH is growing healthy and increasing in relevance

Question: Please rate the degree of capacity utilization of your DooH network(s) with advertising bookings in 2015 compared to 2014 (including the expected bookings until the end of the current year)?

- Over 75% of polled companies currently doing business in the Digital out of Home market have seen a rise in advertising bookings in the current year. The overall market is expected to register a healthy increase in the total number of bookings for 2015.
- 25% of the market has registered no change in the number of advertising bookings in the year-on-year trend in 2015 compared to 2014. None of the polled companies expect a decline.
- In general DooH is starting to play a more and more important part in the media landscape. DooH is accounting for the most dynamic segment in the traditional ooH advertising branch. Primarily through the digitalisation of media assets has the industry been able to compete with the development in the new media landscape.

YoY bookings of DooH Networks 2014/15

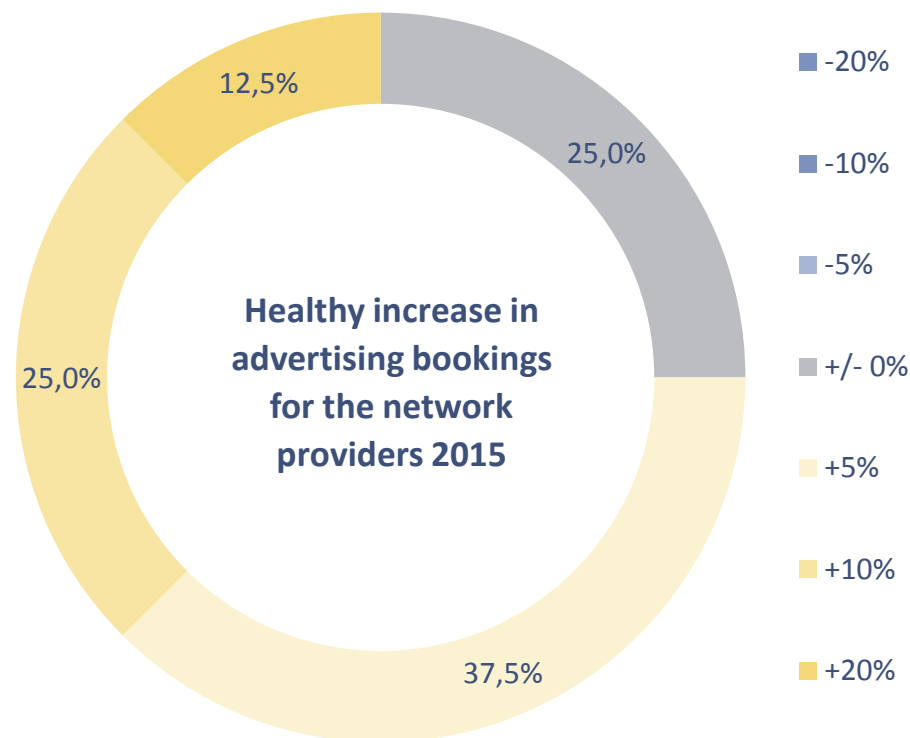


Fig. 5: DBCI Poland November | December 2015 "capacity utilization 2014/15", n=8



DBCI | Roadmap 2015 & Contact

2016	
January	Jan./Feb. 2016/02/01
February	
March	Mar./Apr. 2016/03/21
April	
May	May./Jun. 2016/05/23
June	
July	Jul./Aug. 2016/07/18
August	
September	Sep./Oct. 2016/09/19
October	
November	Nov./Dec. 2016/11/21
December	

- The next survey will take place in calendar weeks 2-3 of 2016
- The next planned publication date will be the 1st of February 2016
- 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 2016. For further information please contact Daniel Russell.

Contact

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