Poland

July | August 2016

DBCI

The pulse of the Digital Signage and DooH industry

DIGITAL SIGNAGE FEDERATION

Digital Signage & DooH Business Climate Index

DSF Europe cooperation partner Poland

POLISH DIGITAL SIGNAGE ASSOCIATION

DIGITAL SIGNAGE SUMMIT

invidis CONSULTING

invidis research
2016 PL 400

The Digital Signage market business sentiment is very stable in Poland

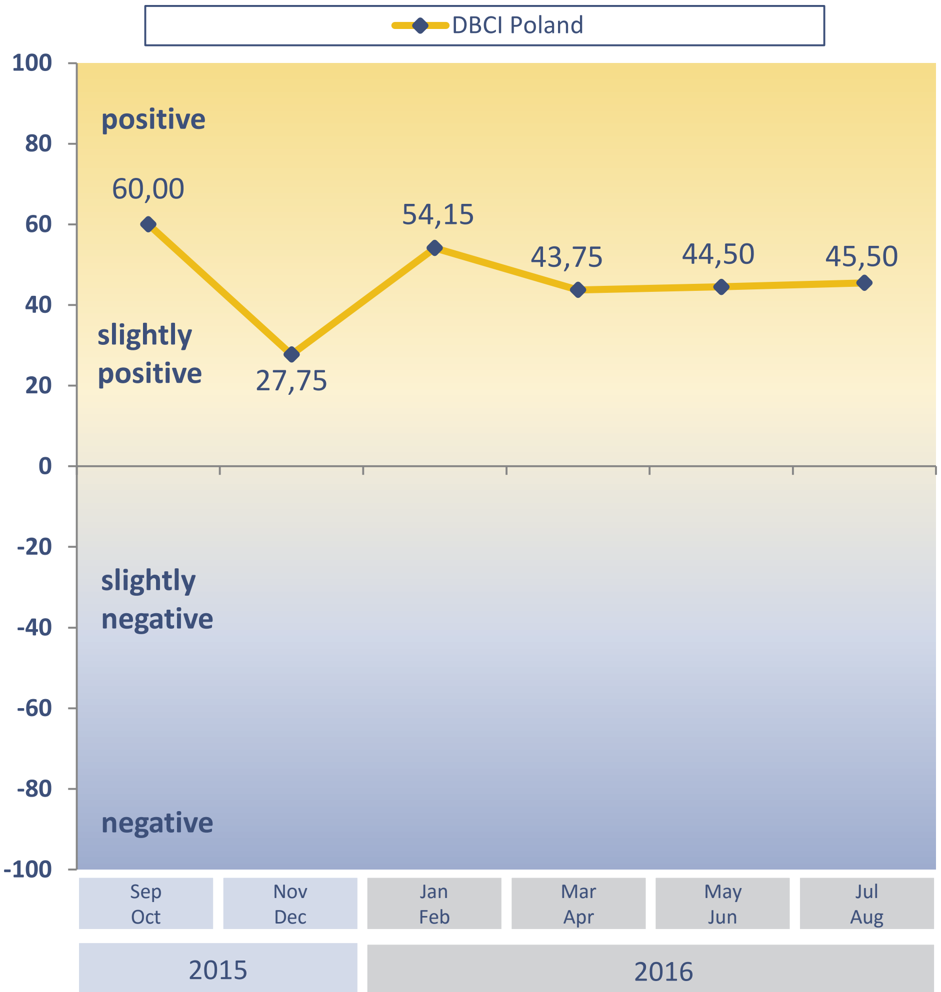


Fig. 1: DBCI Poland July | August 2016 „Index", n=11

Participants: n=11; Region: PL; Survey Period: 2016 calendar weeks 29-30

- Since the last survey in May the Digital Signage Business Climate Index in Poland has remained almost flat with only a small nominal increase by 1 base points from 44,50 base points to 45,50 base points. In total the Index is down by 16,5% year-on-year and up by 2,2% compared to the previous survey.
- The conservative assessment of the current business situation for products and services in the Digital Signage and Digital-out-of-Home industry has grown and dominates the index Together with a significant decline of the negative assessment it is responsible for the overall stable trend of the index. Now over half of all market participants are currently satisfied and expect the business climate to be unchanged within six months.

Further Research

- Over 90% of the polled companies in Poland have growing revenues in 2016. Still 9% of the market participants had to accept a decline in revenues in the first two quarters of 2016. However, all of those companies are expecting to balance the losses at the end of the year.
- The market is not overly concerned by the prospect of an economic fallout due to the Brexit vote in Great Britain

	year-on-year	*previous survey*
change DBCI 2016 #4	**-16,5%**	**+2,2%**

More conservative current business situation & outlook

Current business Situation| Poland | July/August 2016

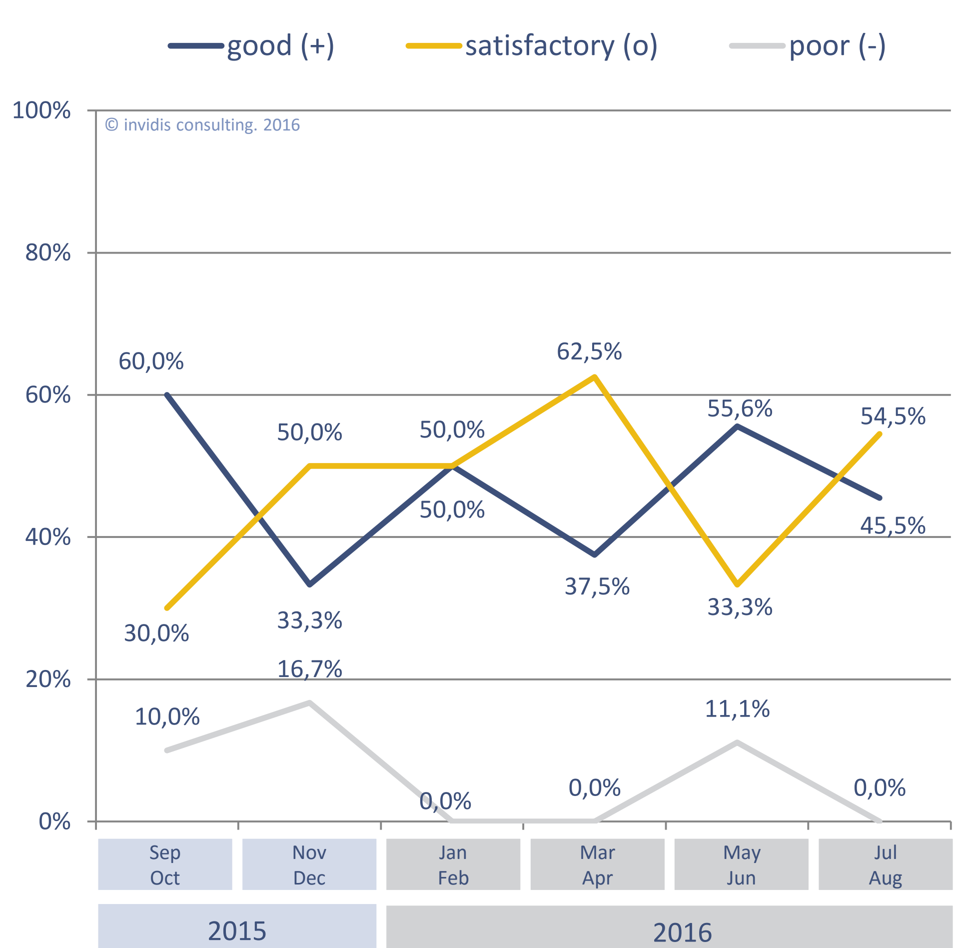


Fig. 2: DBCI Poland July | August 2016 „Business Situation" rolling 12 months, n=11

Expectations | Poland | July/August 2016

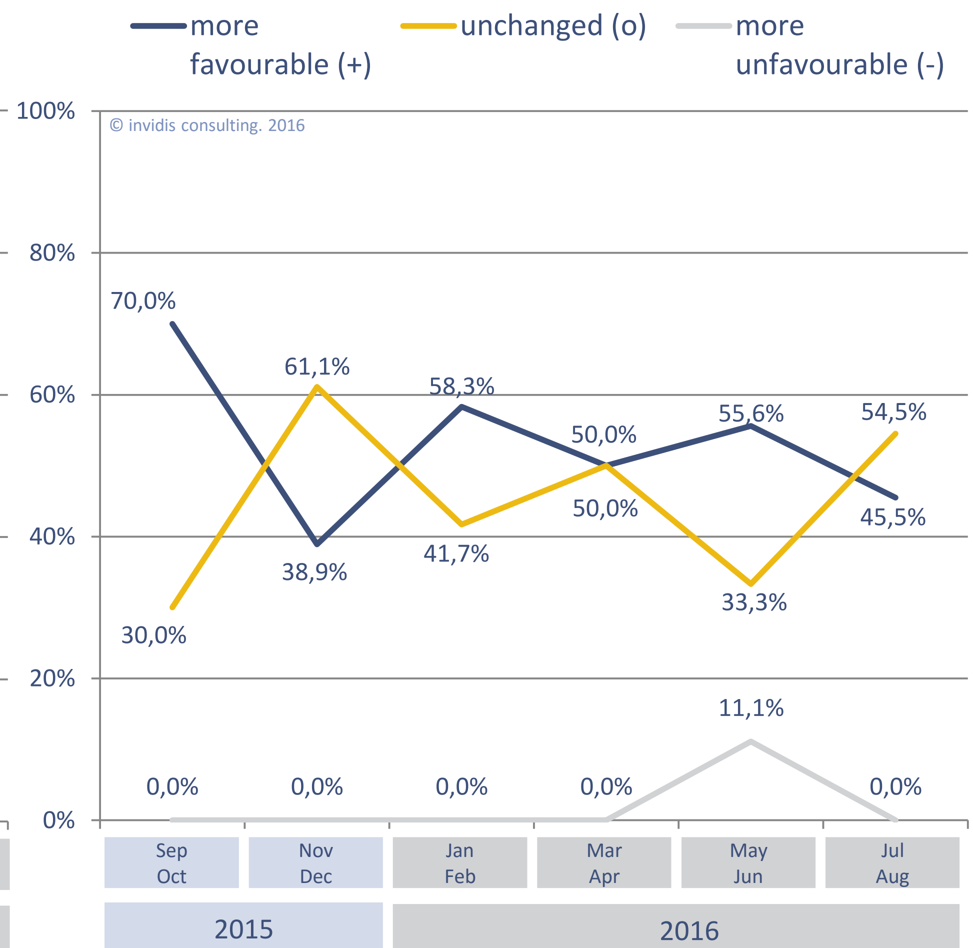


Fig. 3: DBCI Poland July | August 2016 „Expectations" rolling 12 months, n=11

Further research| First semester 2016 with considerably higher revenues than 2015

"The revenues in the first half year 2016 have … in comparison to the revenues of the same period in the previous year."

90,9% of all polled companies could generate in parts a clear increase in revenues in the first half year term in 2016 compared to the same period in the previous year

Only 9,1% of all polled companies had to accept a decrease in revenues compared to the previous year

Legend

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

Fig.: 4 DBCI Poland July | August 2016 "revenues H1 2015-2016", n=11

Further research | Clear increase in revenues expected for the full year 2016

"The revenues in 2016 will … compared to the revenues in 2015."

All of all polled companies are expecting a healthy growth in revenues for the year 2016 compared with the previous year

Non of all polled companies expect a decrease in revenues compared to the pervious year

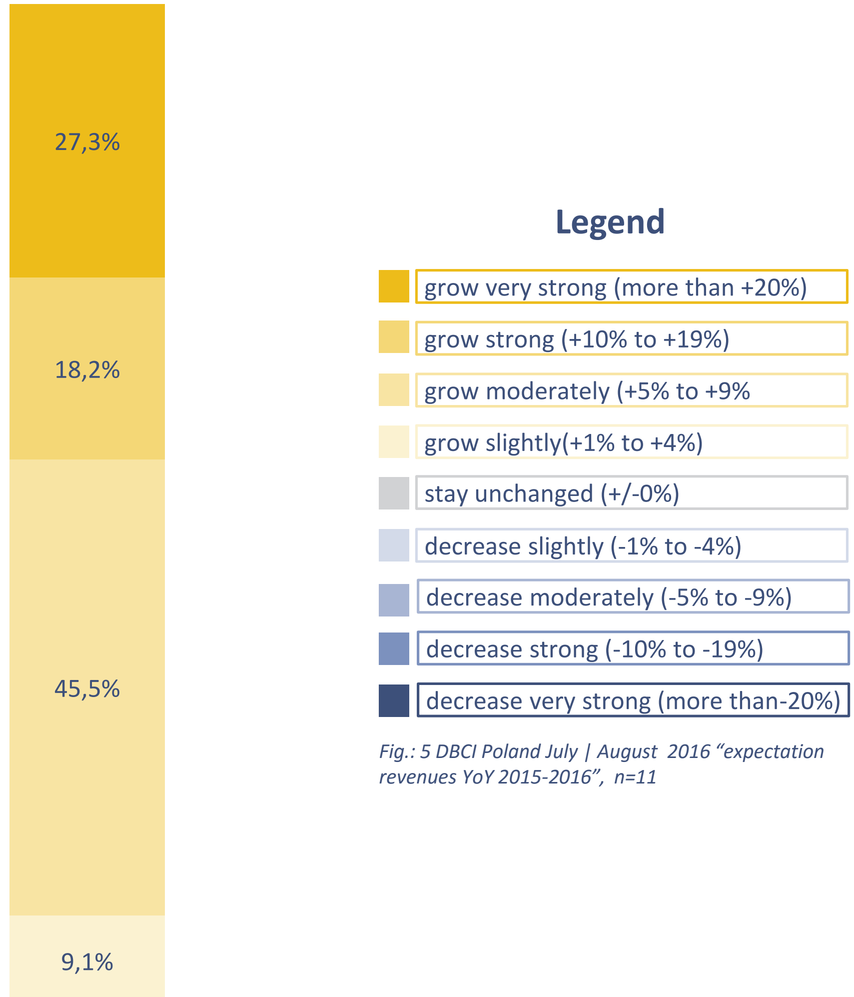
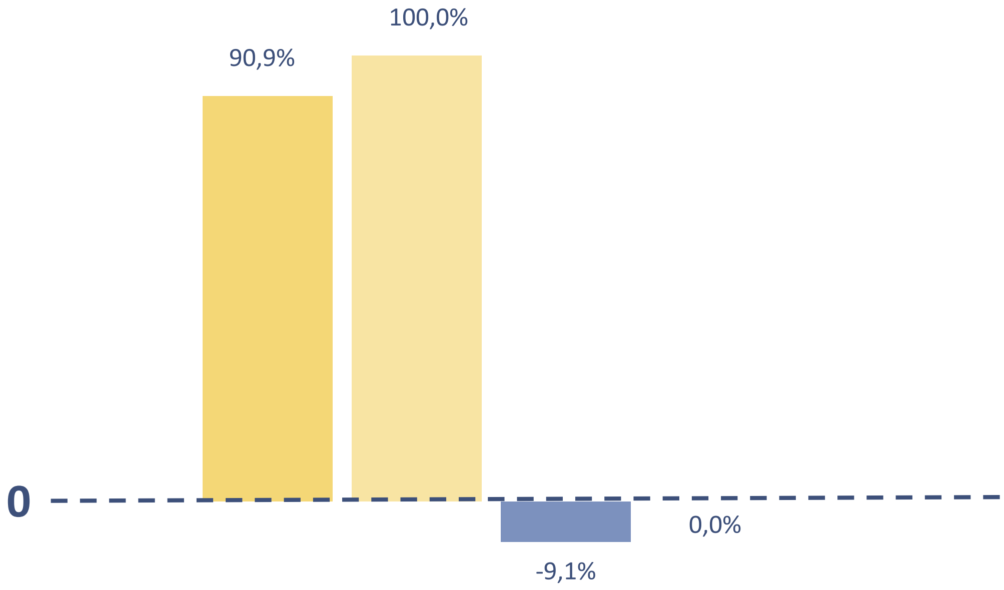


Fig.: 5 DBCI Poland July | August 2016 "expectation revenues YoY 2015-2016", n=11

Further research | First semester losses expected to be contained later this year



Percentage of polled companies which have registered a growth respectively a decline in revenues in H1 2016, compared to the same period in the previous year

- YoY H1 2015-2016 growth
- YoY 2015-2016 growth expected
- YoY H1 2015-2016 decrease
- YoY 2015-2016 decrease expected

Fig.: 6 DBCI Poland July | August 2016 "revenues YoY H1 2015-2016 and YoY 2015-2016", n=11

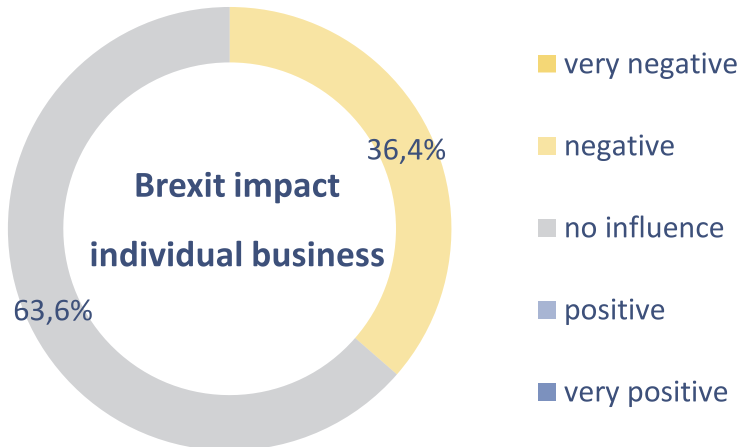
- Over 90% of the polled companies in Poland expect to have a growth in revenues in 2016 compared to 2015
- Still 9% of all polled companies had to accept a decline in revenues in the first six months of 2016. However all of those companies are expecting to have balanced the losses at the end of the fourth quarter
- Traditionally the IT business has a relative calm period in the summer, followed by a strong showing towards the end of the year

Further research | Brexit with only limited influence on Digital Signage market in Poland

***Question 1**: How do you expect the Brexit will influence your company/business?*

***Question 2:** How do you expect the Brexit will influence your national Digital Signage and Digital out of Home market?*

- Roughly two thirds of the polled companies are not overly concerned for their business by the prospect of an economic fallout due to the Brexit vote in Great Britain
- The percentage who see no influence is even higher for the assessment of the general Digital Signage and Digital-out-of-Home economy in Poland
- The industry is still very much concentrated on a local or national region. Most companies have no or only loose business interests in Great Britain.
- Market participants who expect a negative influence are either dependent on exchange rates because of their purchasing policy or have customers respectively close business ties on the islands.



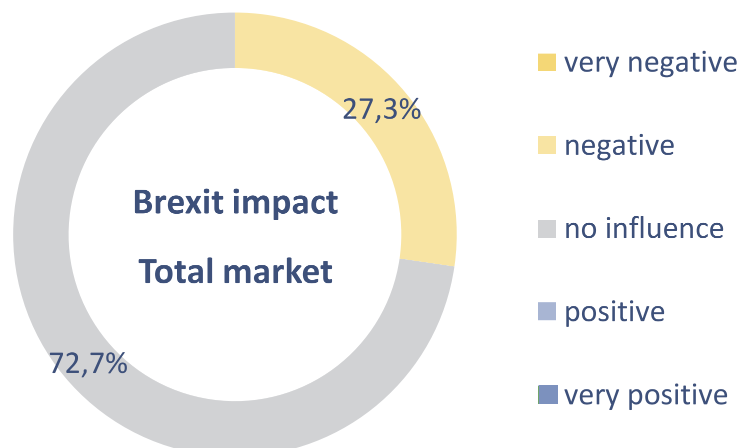


Fig. 7: DBCI Poland July | August 2016 "Brexit", n=11

Roadmap 2016 & Contact

2016	
January	
February	
March	
April	
May	
June	
July	
August	
September	DBCI Sep./Oct. | WN41
October	
November	DBCI Nov./Dec. | WN50
December	

OVAB Europe will be rebranded as **Digital Signage Federation Europe** starting with the 1st April 2016

- The next survey will take place in calendar weeks 39-40
- The next planned publication date will be in week 41
- 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 2016. For further information please contact Daniel Russell.

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DSS | The Digital Signage Summit series

THE LEADING DIGITAL SIGNAGE AND DIGITAL OUT OF HOME STRATEGY CONFERENCE SERIES

- «Digital Signage Summit» new brand for event series
- DSS is a dedicated confex event platform - conference and exhibition - featuring digital signage and DooH topics
- 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

A JOINT VENTURE BETWEEN: Integrated Systems Events, invidis consulting