



Out-of-home Video
Advertising Bureau
Europe

OVAB-cooperation partner Poland:



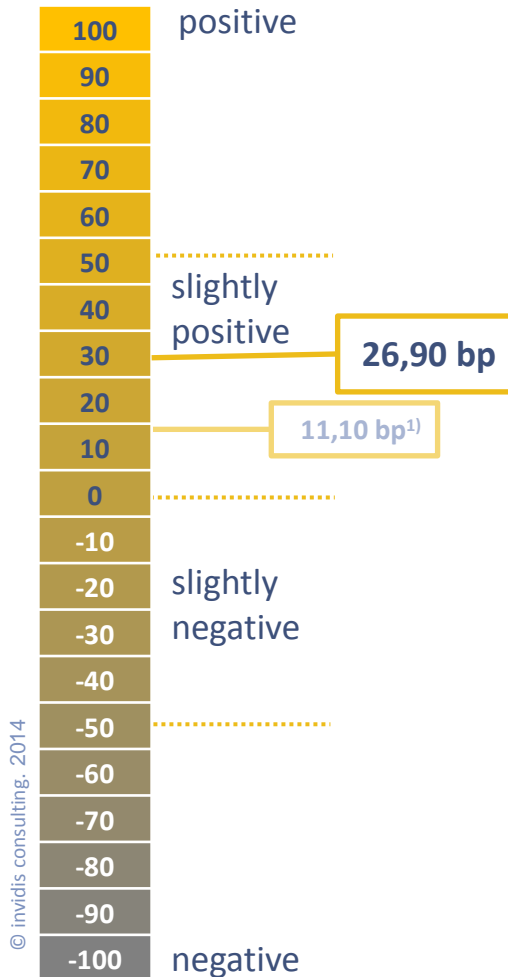
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CONSULTING

OVAB Europe / PDSA
Digital Signage Business Climate Index January/February 2014
Poland

27th January 2014

- The OVAB Europe **D**igital **S**ignage **B**usiness **C**limate **I**ndex (DBCI) is the leading European indicator of the economic development of the Digital Signage and Digital-out-of-Home industry
- It is polled every two months by invidis consulting in cooperation with OVAB Europe and PDSA
- Questions:
 - Current business situation: “good”, “satisfactory” or “poor”
 - Expectations for the next six months: “more favourable”, “unchanged” or “more unfavourable”
- **Poland** – second poll January/February 2014:
 - Poland is the biggest market for Digital Signage in the CSEE region and the 9th largest market in Europe (in units of public displays)
 - DBCI index Poland: **26,90 base points**
 - Over **53%** expect a **more favourable** business situation within the next six months
 - Only **15%** expect an economical **decline**

Clear upswing in the DS industry forecasted for 2014



- The digital Signage Business Climate Index Poland has been polled for the second time in 2013. The Index has increased by almost 16 base points, reflecting the current positive business sentiment of the Digital Signage industry in Poland
- New pilot installations starting in 2014
- Few but consistent new investments in Digital Signage installations
- Some big roll outs will be finalized in the first quarter of 2014
- Since the second half of 2013 new market entries of dynamic IT companies

Survey facts

- Participants: n=13
- Region: Poland
- Time frame: 7. – 17. January 2014

Fig. 1: DBCI Poland January February 2014, n=13
1) November/December 2013

Increasing 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?

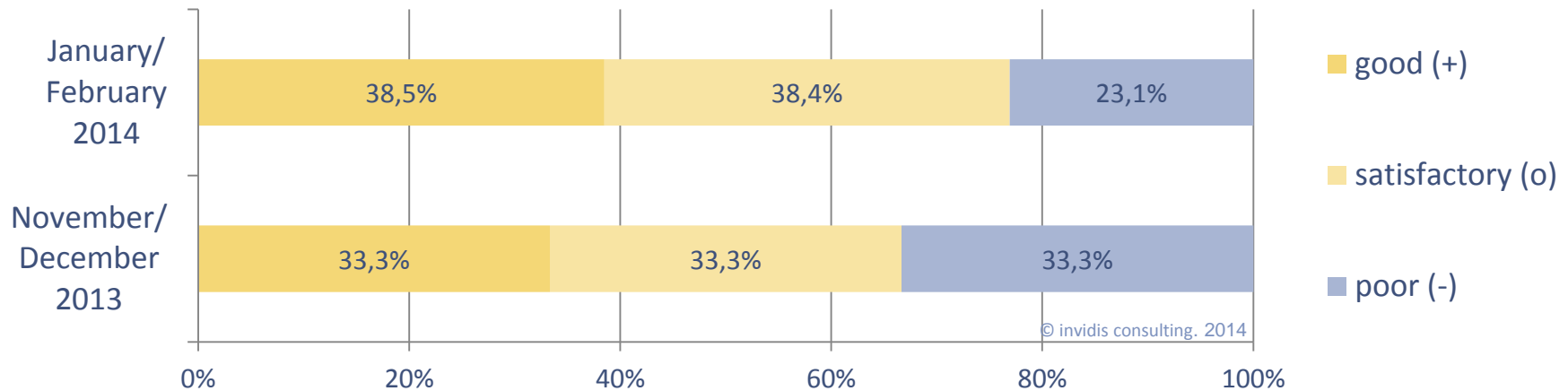


Fig. 2: DBCI Poland January/February 2014 "business situation", n=13

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

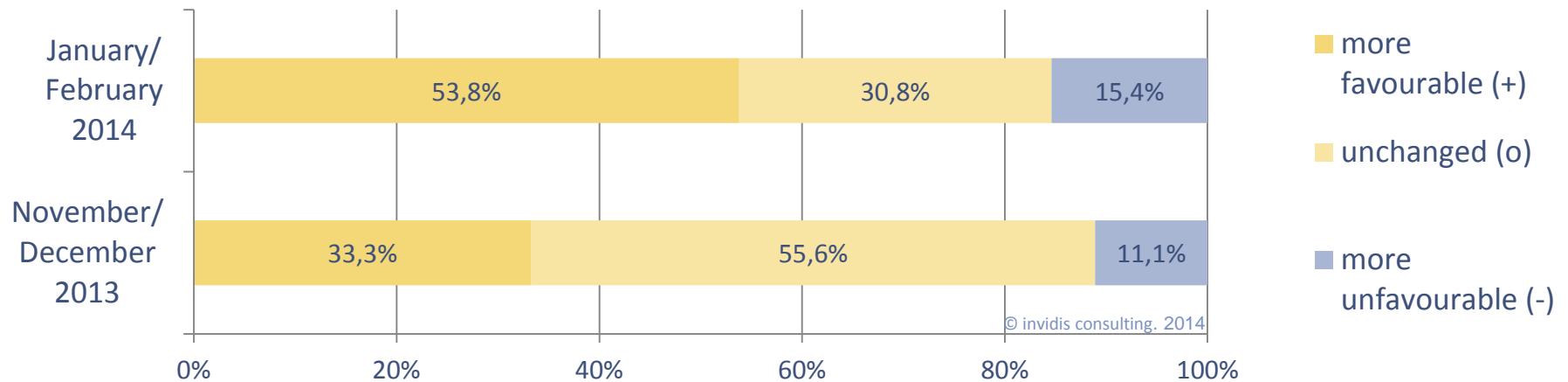


Fig. 3: DBCI Poland January/February 2014 "business expectations", n=13

Question: Did the number of employees in your company increase in 2013?

- 83,4% of all polled companies have hired new staff in 2013
- Aprox. 30-50 new jobs were created in the Digital Signage industry in Poland in 2013
- As a whole there is a high demand for qualified personnel
- Due to an increasing expansion in vertical markets the Digital Signage companies require more professionals from different industry branches

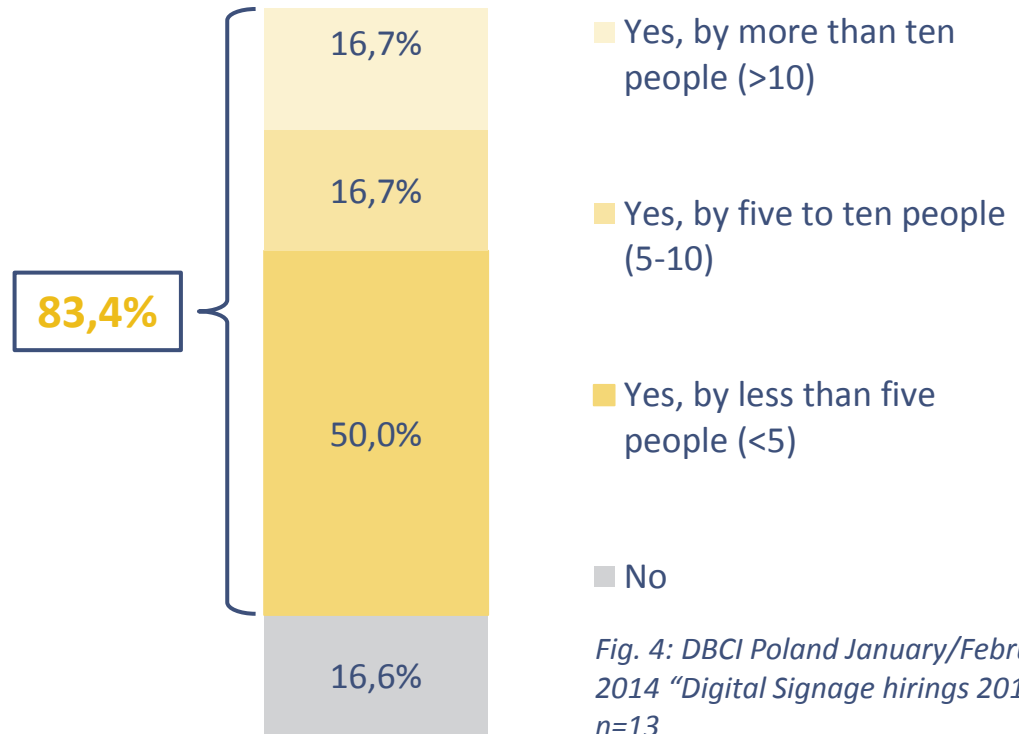


Fig. 4: DBCI Poland January/February 2014 "Digital Signage hirings 2013", n=13

- CMS HTML 5 ready, Flash in decline
- Android based devices are a cost efficient alternative for small installations
- Launch of professional displays in small sizes (<20")
- Rising media budgets will have positive effect on DooH
- Industry standardization (e.g. SLA's, ad impressions, API's)
- Professionalisation in all segments and fully professionalised projects (e.g. hardware, interactivity, content etc.)
- Better market research (DBCI)



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2014
Januar
Februar
März
April
Mai
Juni
Juli
August
September
Oktober
November
Dezember

← **Mar./Apr. | 24.03.**

← **May/Jun. | 19. 05.**

← **Jul./Aug. | 21.07.**

← **Sep./Oct. | 18.09.**

← **Nov./Dec. | 17.11.**

- The next survey will take place in calendar weeks 10-11 of 2014.
- The next planned publication date will be the 24th March 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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Save the Date!
17. - 18. September
2014



digital signage

8th MUNICH CONFERENCE

17 – 18 September 2014
Kempinski Hotel Airport Munich





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