

Poland  
July | August 2014

**DBCI**

The pulse of the Digital Signage  
and DooH industry

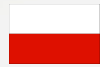
 Digital Signage & DooH  
Business Climate Index

OVAB Europe cooperation partner Poland



invidis research  
2014 PL 400





## Polish Digital Signage industry with positive momentum

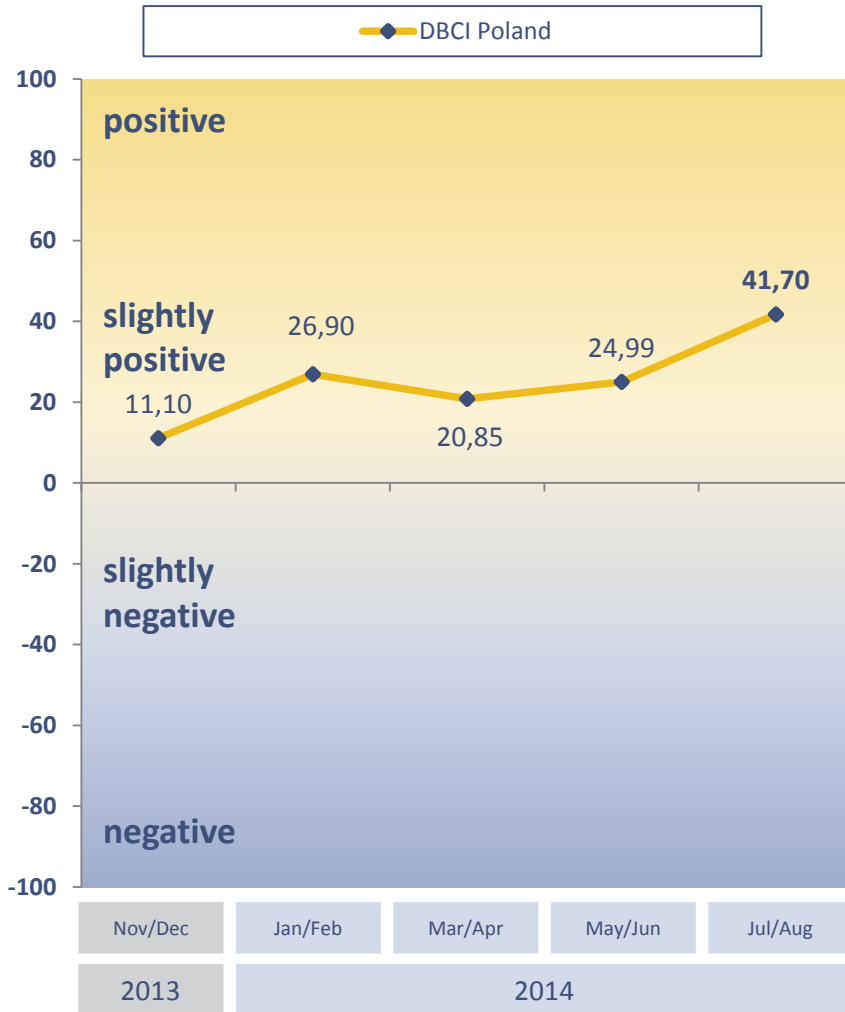


Abb. 1: DBCI July/August2014 „Index Poland“, n=12

- The Digital Signage Business Climate Index (DBCI) in Poland has strongly increased since the last poll in May. The Index grew by 16,71 base points and remains in the “slightly positive” level
- The industry shows a high satisfaction with the current business situation as over 90% of all participants answered with “good” or “satisfactory”
- The expectations for the next six months are very good as 50% of all polled companies see the future “more favourable”
- Since 2013 Poland is one of the top ten markets for Digital Signage in Europe. Here particularly price aggressive hardware solutions have had a huge success. Only the current political tensions could dampen the economic outlook, however the IT sector is not likely to be directly affected
- With the general economy further expanding the Digital Signage industry has very positive expectations for the second half-year of 2014

### Survey facts

- Participants: n=12
- Region: Poland
- Time frame: 2014 calendar weeks 28 & 29



# Clearly improved current business situation

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

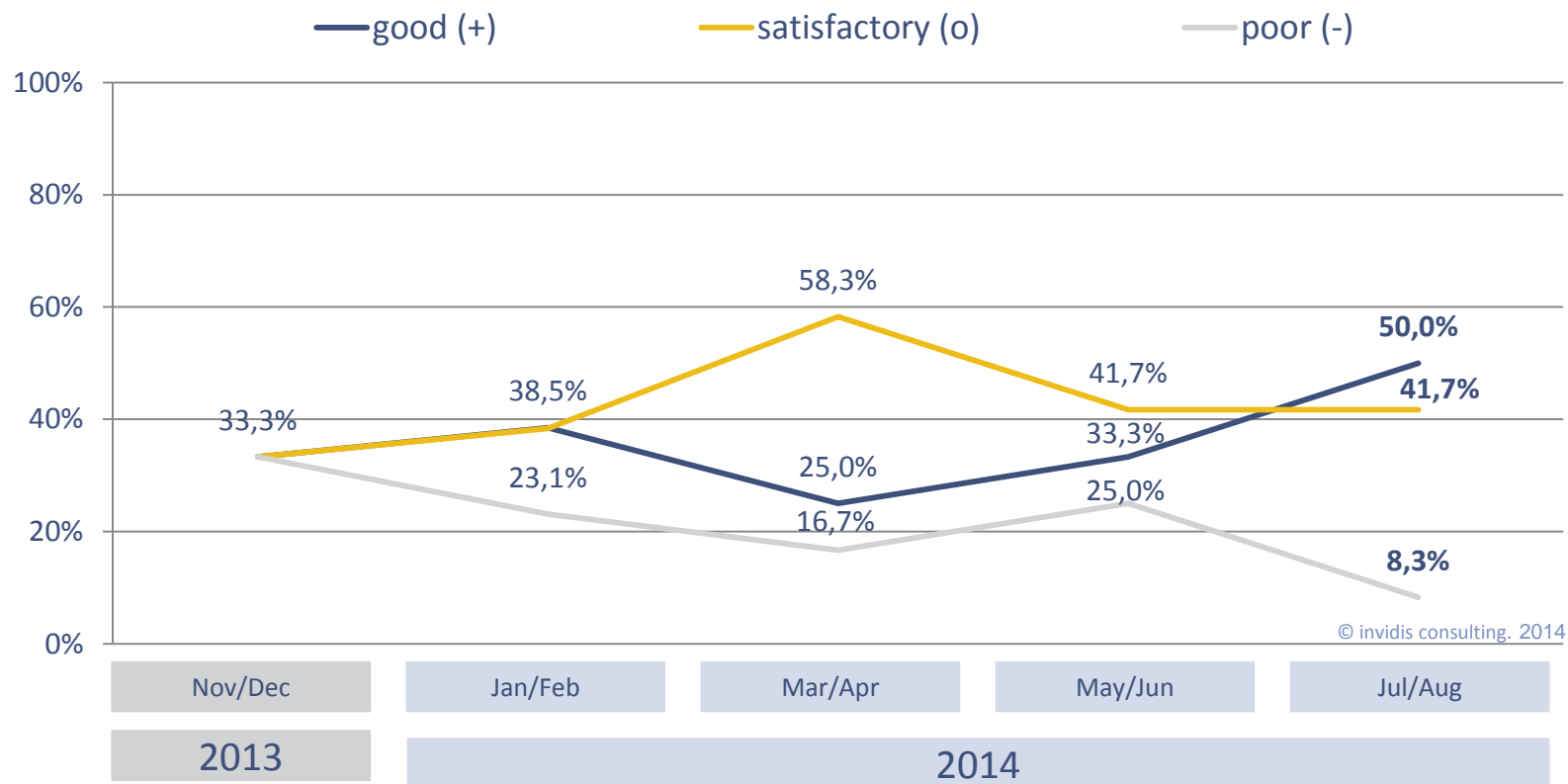


Fig. 2: DBCI Poland July/August 2014 "business situation", n=12



# Constant positive outlook for the next six months

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

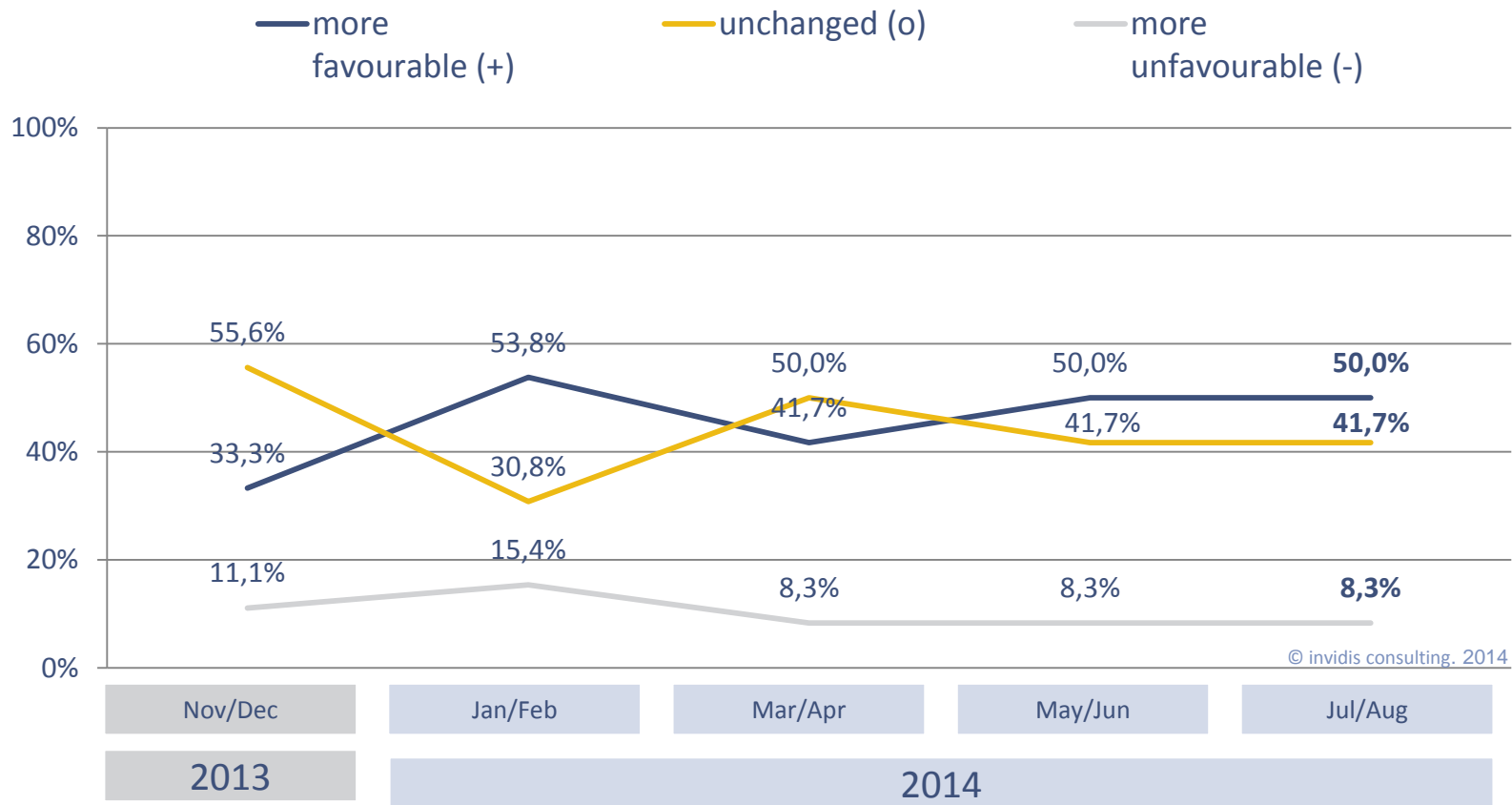
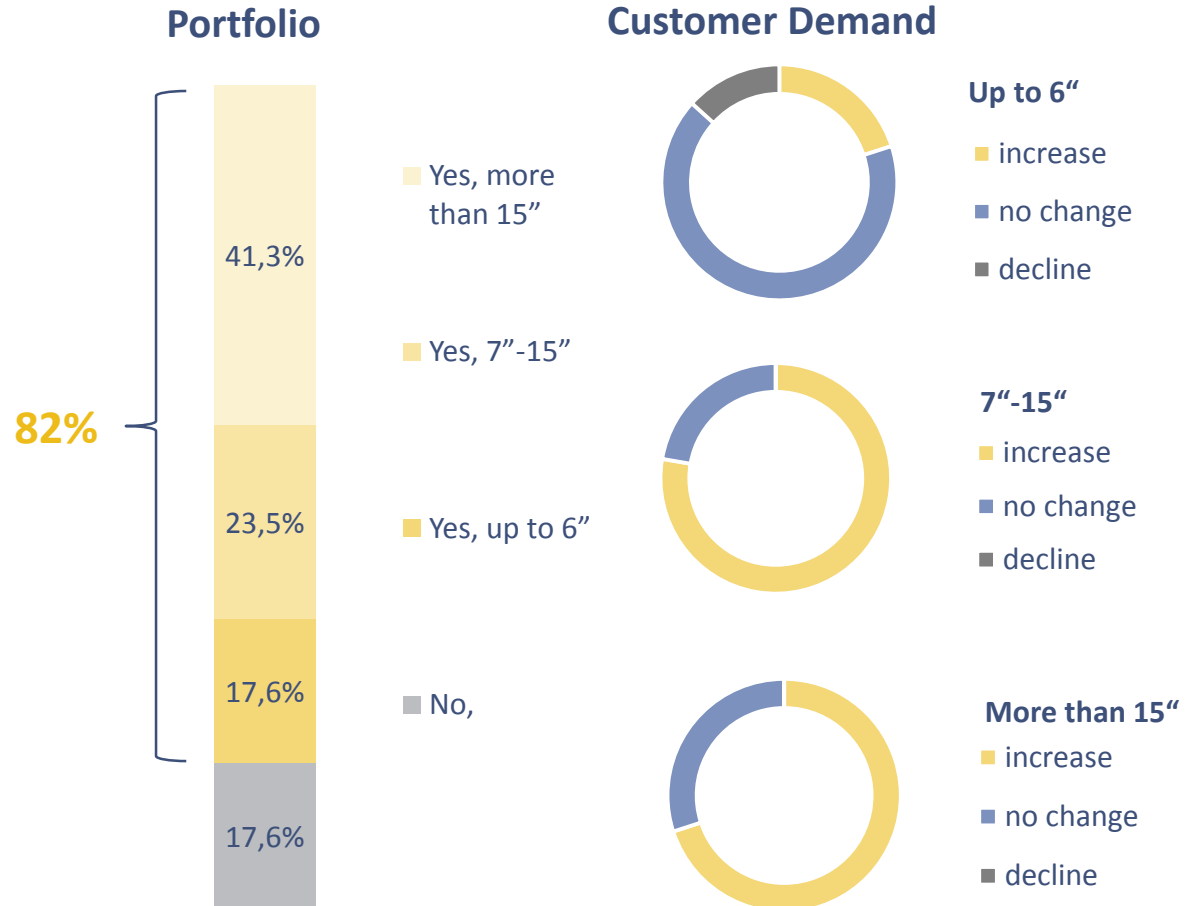


Fig. 3: DBCI Poland July/August 2014 "business expectations", n=12



## Further research | Increasing demand for Small Signage

- 82% of all polled companies have already installed displays with sizes smaller than 32" in Digital Signage solutions. Particularly the 'tablet' sizes between 7" and 15" is widely in use
- The market participants also predict an increase in customer demand for Small Signage within the next 12 months. For the sizes 7"-15" and bigger than 15" approximately 75% see a rising demand
- However for displays smaller than 7" the demand is predicted to be lower. Less than 1/4 of all polled companies see here an increase within the next 12 months



Question: „Did you sell or install small professional Displays (smaller 32") in Digital Signage installations?“

Question: „How do you think will the customer demand for displays smaller 32" in Digital Signage related projects evolve over the next 12 months?“

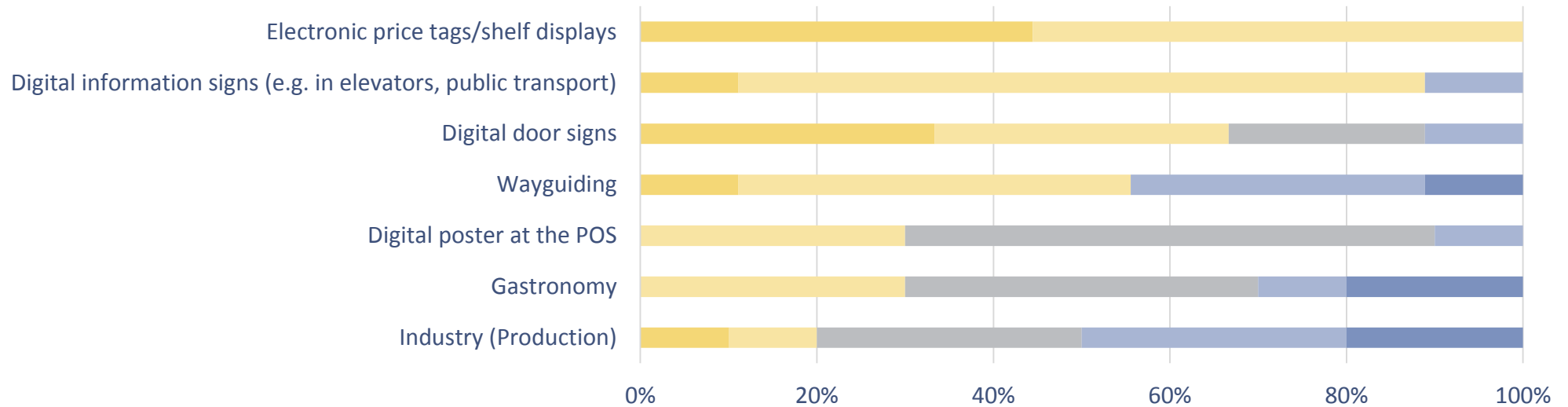
Fig. 4: DBCI July | August 2014 „Portfolio & Demand – Small Signage" n=12



## Further research | High potential for Small Signage for shelf displays & digital signs

- Over **90%** of all polled companies think that shelf displays and digital information signs like for example in elevators or in the public transport are the most important scenarios for professional Small Signage (displays smaller than 32")
- The market participants also see a high potential for Small Signage with solutions concerning room management and wayguiding. Modern business and office culture has created a high pressure on the use and allocation of expensive meeting rooms. Here the digitalization of operations and management has a significant effect on the TCO of the office facilities, making the installation of Digital Signage very attractive for companies

■ very important  
 ■ important  
 ■ neutral  
 ■ less important  
 ■ not important



Question: „Where do you see the most important use cases for displays smaller 32“?“

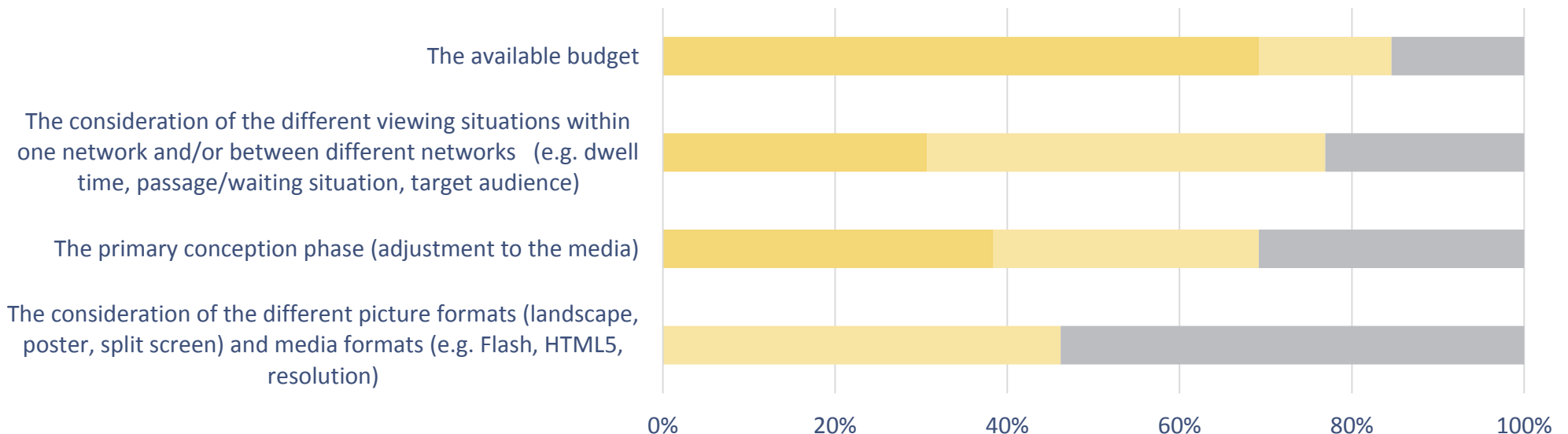
Fig. 5: DBCI July | August 2014 „Use cases for Small Signage“, n=10



## Additional Research | Creativity is still a demanding challenge in DooH

- The creative process in DooH campaigns has to manage many difficult challenges. In particular the restricted budgets in the below-the-line media have a noticeable impact on the creative freedom
- The market participants also see big challenges for DooH campaigns in the the consideration of the diverse viewing situations respectively dwell times. The storyline for spots in a passage situation have to be much more condensed and pronounced than in a waiting situation. Moreover, the primary conception phase, where one adapts campaigns from other media formats to perfectly fit the DooH characteristics is seen as to be challenging
- In spite of these results only **10%** of the polled companies offer a sufficient number of workshops to familiarize their customers with the distinct characteristics of the media

■ Very high ■ High ■ Neutral ■ Low ■ Very low



Question: „Please rate how high the challenges in the creative process of a Digital-out-of-Home campaign are?“

Fig. 6: DBCI July | August 2014 „creative challengens for DooH“, n=12





## Roadmap 2014 & Contact

- The next survey will take place in calendar week 35-36 of 2014
- The next planned publication date will be the 18<sup>th</sup> of September 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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2013	
January	
February	
March	
April	
May	
Jun	
July	
August	
September	← <b>Sep./Oct.   18.09.</b>
October	
November	← <b>Nov./Dec.   24.11.</b>
December	





# digital signage

## 8th MUNICH CONFERENCE

17 – 18 September 2014  
Kempinski Hotel Airport Munich

Save the Date!

17. - 18. September  
2014

