

Poland

November | December 2014

DBCI

The pulse of the Digital Signage
and DooH industry

OVAB Digital Signage & DooH
Business Climate Index

OVAB Europe cooperation partner Poland



invidis research
2014 PL 600



Business sentiment ends the year on a positive trend

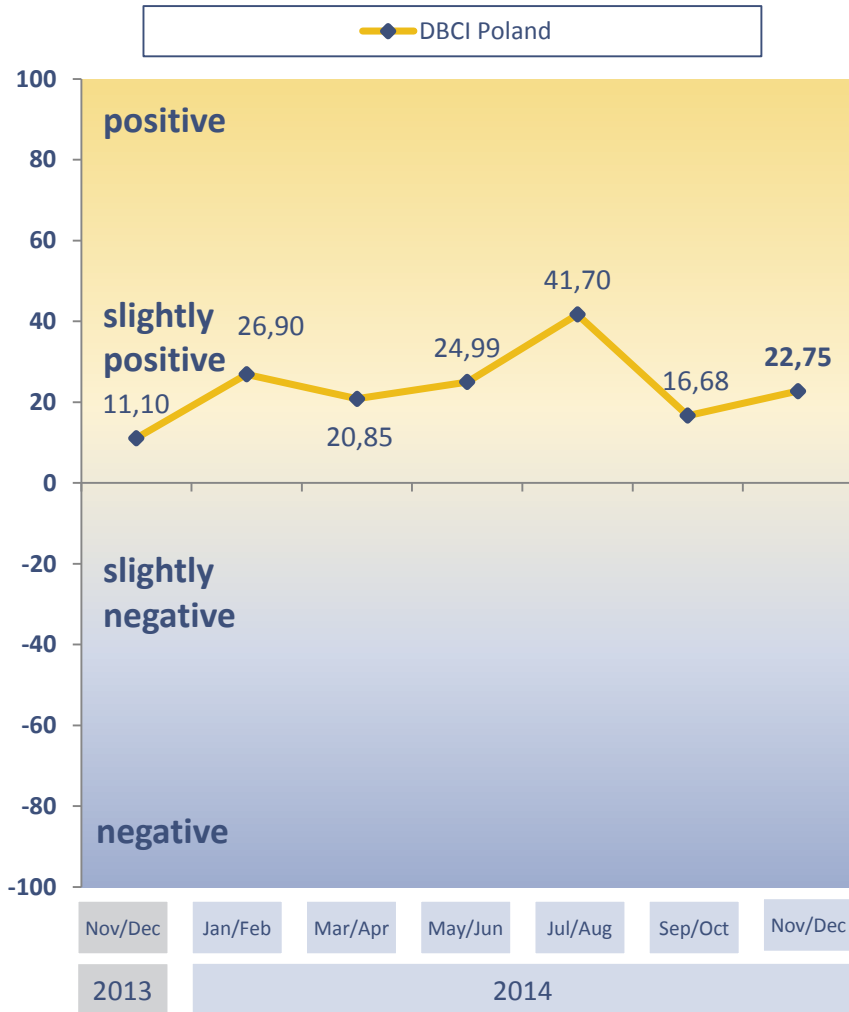


Abb. 1: DBCI November | December 2014 „Index Poland“, n=11

- The Digital Signage Business Climate Index (DBCI) in Poland has increased since the last poll in September. The Index grew by 6,07 base points and is on a “slightly positive” level
- The rating of the current business situation saw a strong growth of the positive answers. Whereas the optimism concerning the near future remained rather stable
- The drastic decrease in the oil price since the summer has significantly lowered the energy costs in the major European economies to the effect, that after a dent in September/October, the DBCI is back on a positive trend

Further Research

- The very high costs for UHD content has a dampening effect on the expectations for full UHD projects in the next year
- Falling hardware prices and availability of plug-and-play solutions have resulted in a high demand for entry-level Digital Signage

- Participants: n=11
- Region: Poland
- Time frame: 2014 calendar weeks 47 & 48



Increasingly better current business situation

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

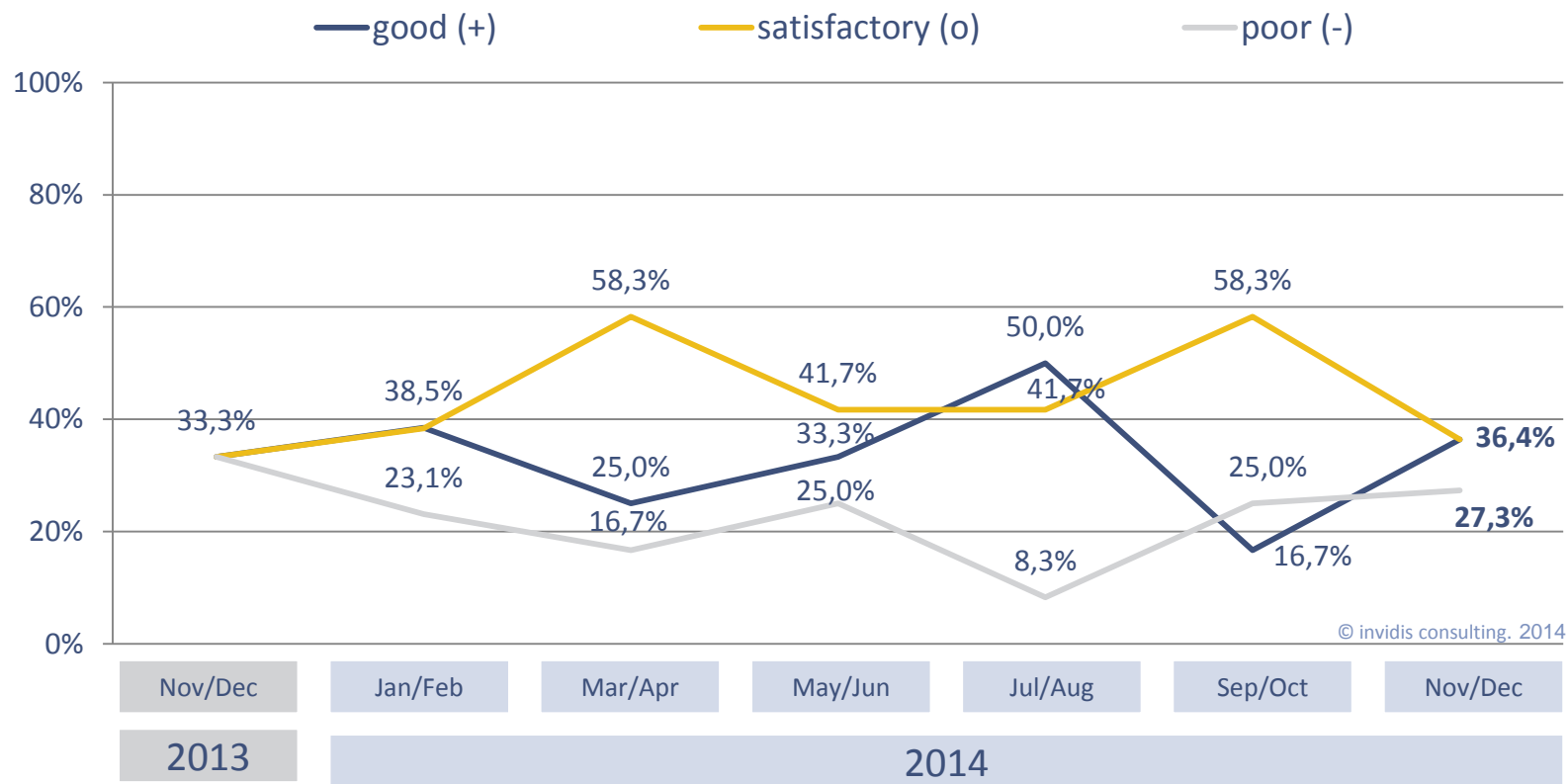


Fig. 2: DBCI Poland November | December 2014 "business situation", n=11



Slightly more conservative expectations

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

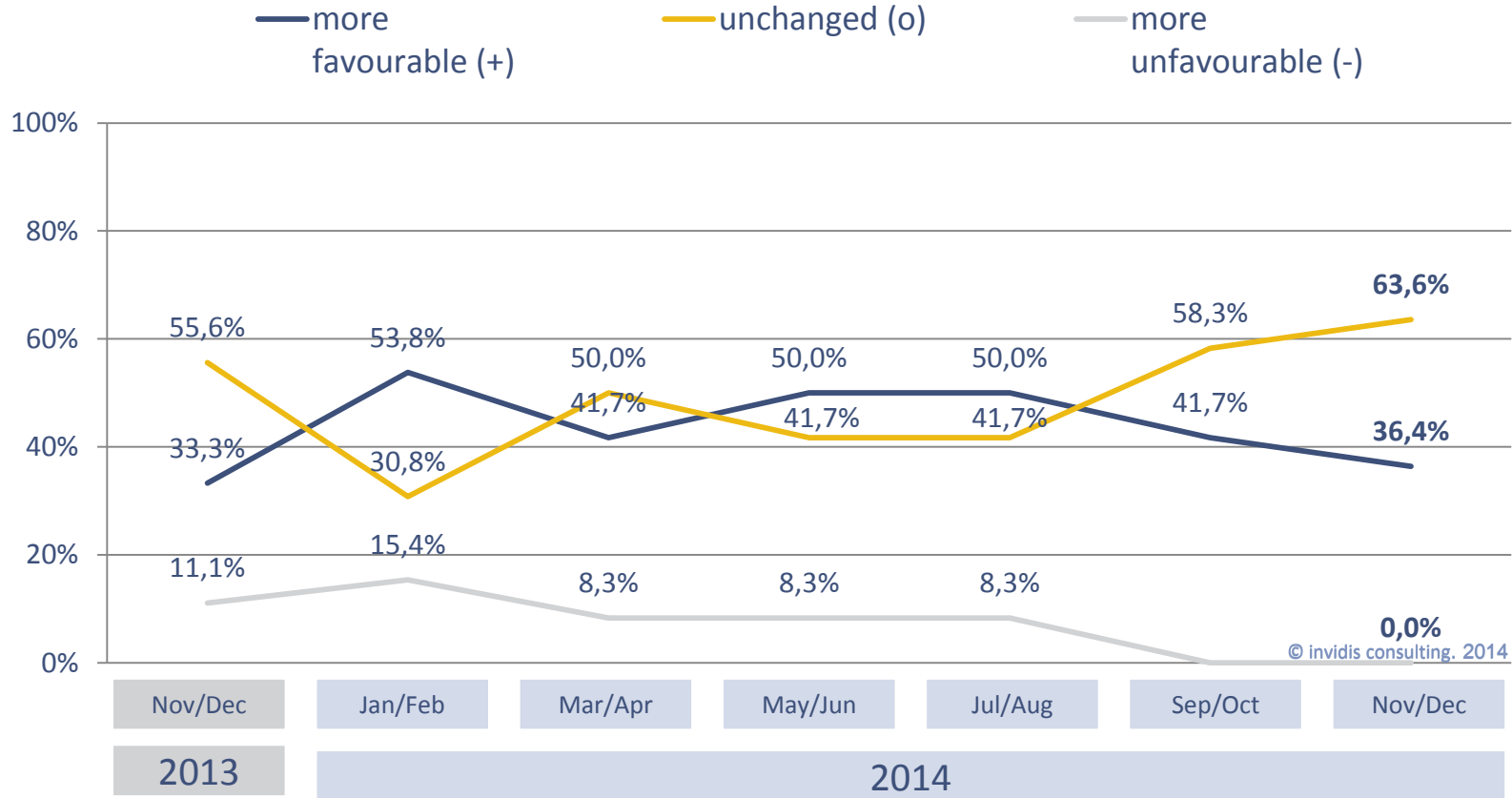


Fig. 3: DBCI Poland November | December 2014 "business expectations", n=11



Further research | Low market share for UHD, but high demand for entry level signage

Market share UHD products in Digital Signage projects 2015

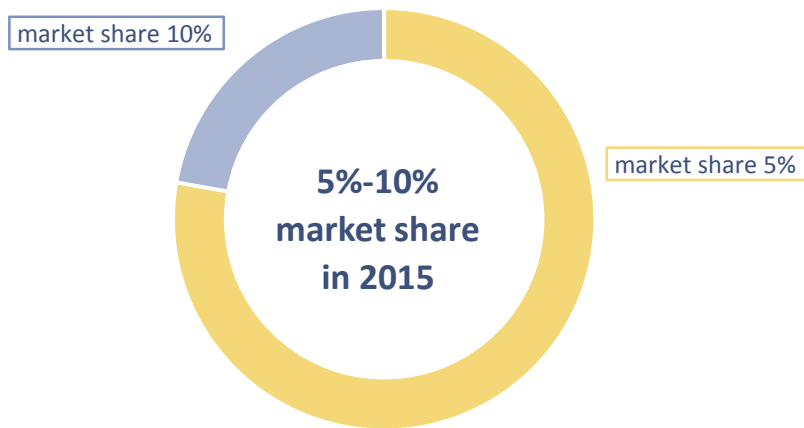


Fig. 4: DBCI Poland November | December 2014
"market share UHD 2015", n=9

Question: How do you expect will the market for UHD products (displays, media player, software, content) evolve over the next 12 months? The market share will be at ...

The very high costs for UHD content has a dampening effect on the expectations for full UHD projects in the next year

Demand for entry-level products in Digital Signage projects 2014

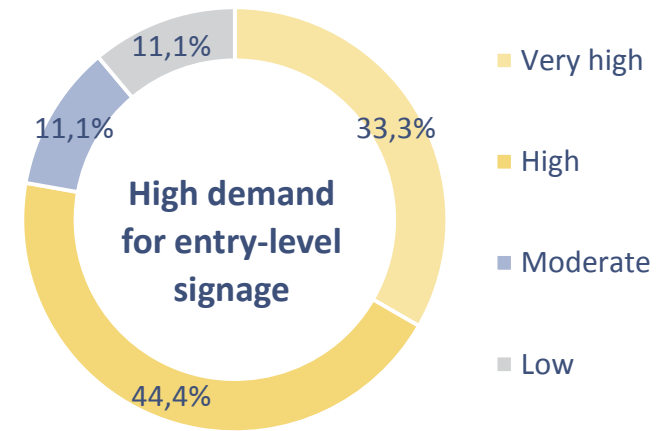


Fig. 5: DBCI Poland November | December 2014
"demand for entry level products 2014", n=9

Question: How much demand did your customers have for entry-level products (hardened consumer displays, cost effective media players, standard software, content shops & templates) within the last 12 months?

Falling hardware prices and availability of plug-and-play solutions have resulted in a high demand for entry-level Digital Signage



Further research | DooH industry favours traditional nomenclature

Question: Which nomenclature do you prefer for Digital-out-of-Home?

70% of all polled companies are favouring the nomenclature **Digital-out-of-Home (DooH)** for the media

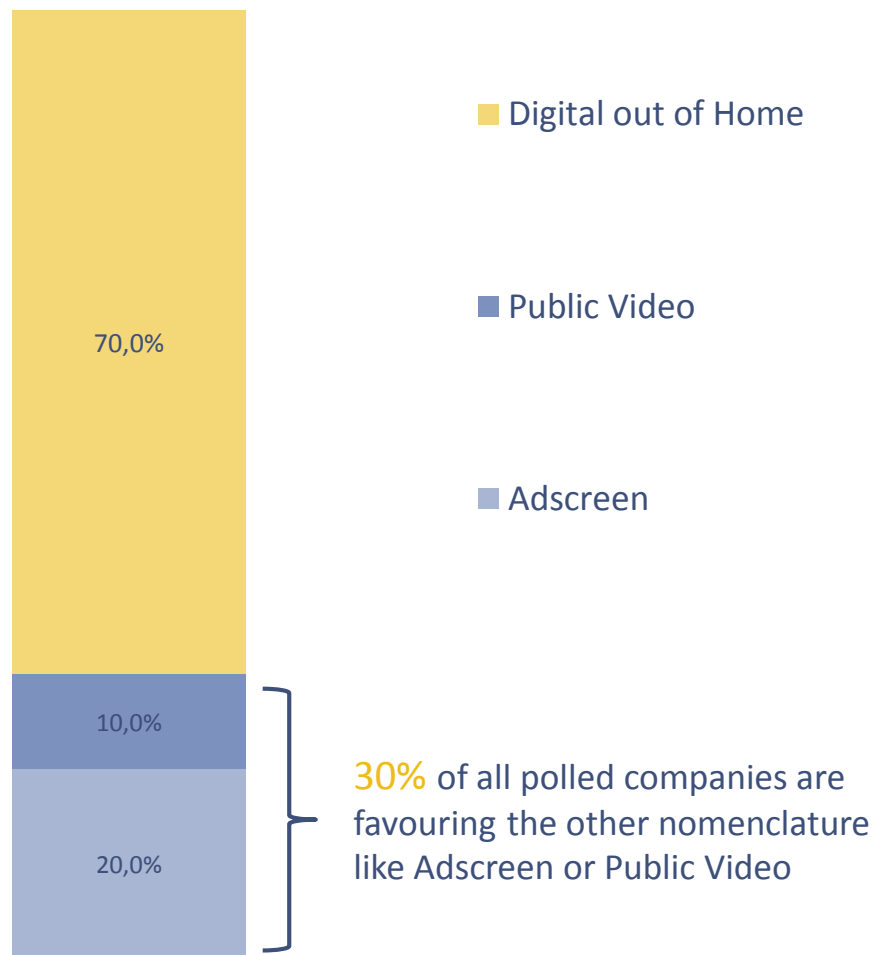


Fig. 6: DBCI Poland November | December 2014
"favoured nomenclatura DooH", n=16



DBCI | Roadmap 2015 & Contact

2015	
January	Jan./Feb. 02.02.2015
February	
March	Mar./Apr. 23.03.2015
April	
May	May/Jun. 18.05.2015
June	
July	Jul./Aug. 20.07.2015
August	
September	Sept./Oct. 17.09.2015
October	
November	Nov./Dec. 26.10.2015
December	

- The next survey will take place in calendar week 3-4 of 2015
- The next planned publication date will be the 2nd of February 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

Contact

Daniel Russell | Junior Analyst
 invidis consulting GmbH
 Rosenheimer Str. 145e
 81671 München
Daniel.Russell@invidis.com
 Phone: +49 89 2000416-21
 Mobile: +49 151 62438503
 Fax: +49 1805 5224 301