

Poland
March | April 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 200



Digital Signage business sentiment increasing for the third time since September 2014

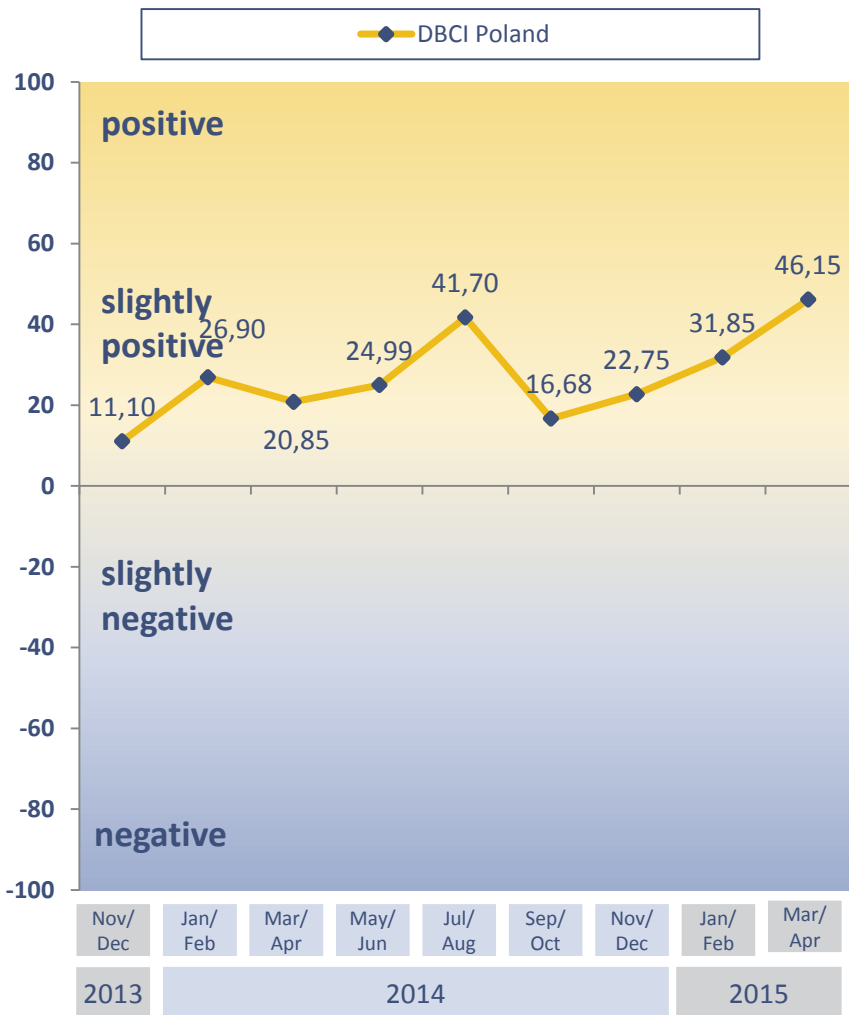


Abb. 1: DBCI Poland March | April 2015 „Index“, n=13

- The Digital Signage Business Climate Index (DBCI) in Poland has further increased since the last poll in January. The Index grew from 31,85 base points by 14,30 points to 46,15 base points and reached an all time high
- The market participants are currently highly satisfied or better with the business situation, as over 90% of the polled companies have stated. The relatively disappointing year 2014 with a slightly contracting market is over and fresh budgets make new IT investments viable
- The Digital Signage market in Poland has also an increasingly positive outlook for the next six months

Further Research

- The market participants have again underlined the high importance of the SMB market for Digital Signage, with three quarters of all revenues being generated in this sector
- Clear growth in the DooH sector expected for the next 36 months. Particularly a combination of cross-media bundling and the development of new networks will drive the media to a market share of between 10% and 20% of Outdoor.

- Participants: n=13
- Region: Poland
- Time frame: 2015 calendar weeks 10-11



Status Quo | Current business situation starts positive trend

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

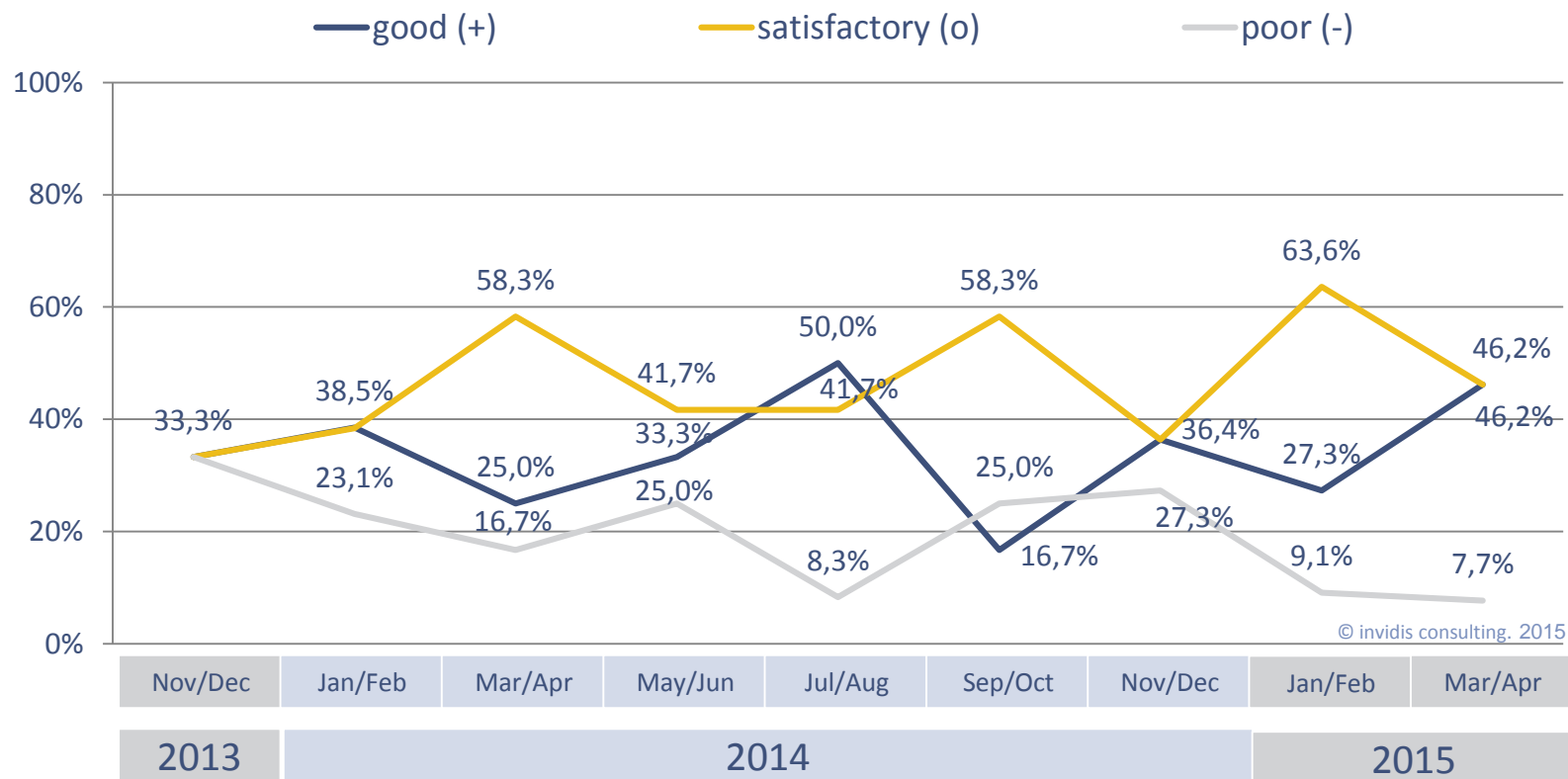


Fig. 2: DBCI Poland Poland March | April 2015 "business situation", n=13



Expectations | First quarter sees positive expectations further increasing

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

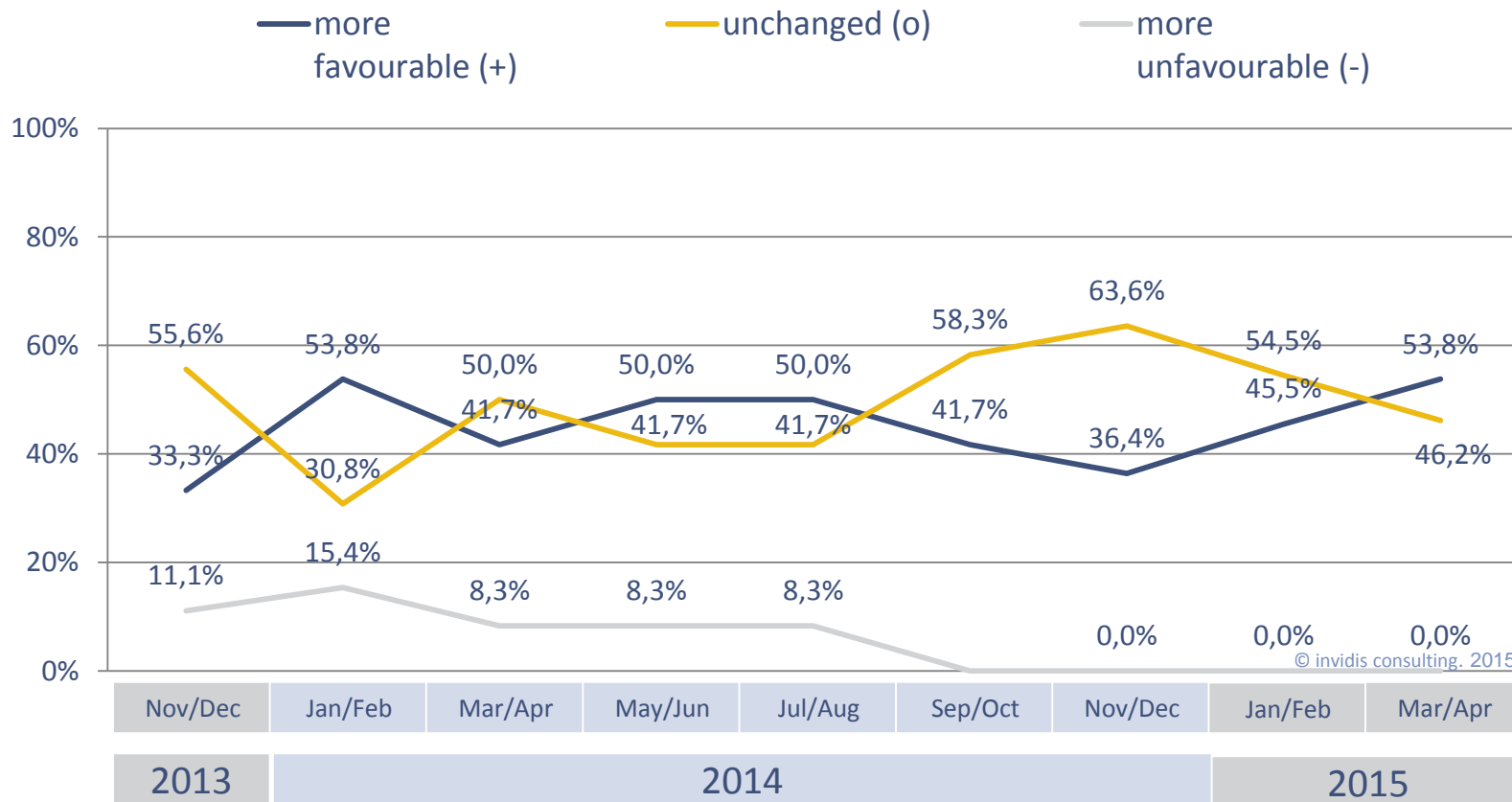


Fig. 3: DBCI Poland March | April 2015 "business expectations", n=13



Further research | The SMB sector drives Digital Signage revenues in 2014

Question: How many projects did your company roll out in the following categories in 2014?

- 80% of all DS projects in 2014 were small and medium installations with up to 50 displays
- Smaller projects have a higher margin and can be carried out successfully by most players in the market
- Falling hardware prices created a high demand for easy-to-use Digital Signage solutions in the SMB sector
- Only 17% Digital Signage networks rolled out in 2014 were larger than 100 displays
- Large projects generate high revenues, but discounts increase with the number of hardware used and tear into the margin. Moreover, only few market participants can sustainably carry out projects with over 100 displays.

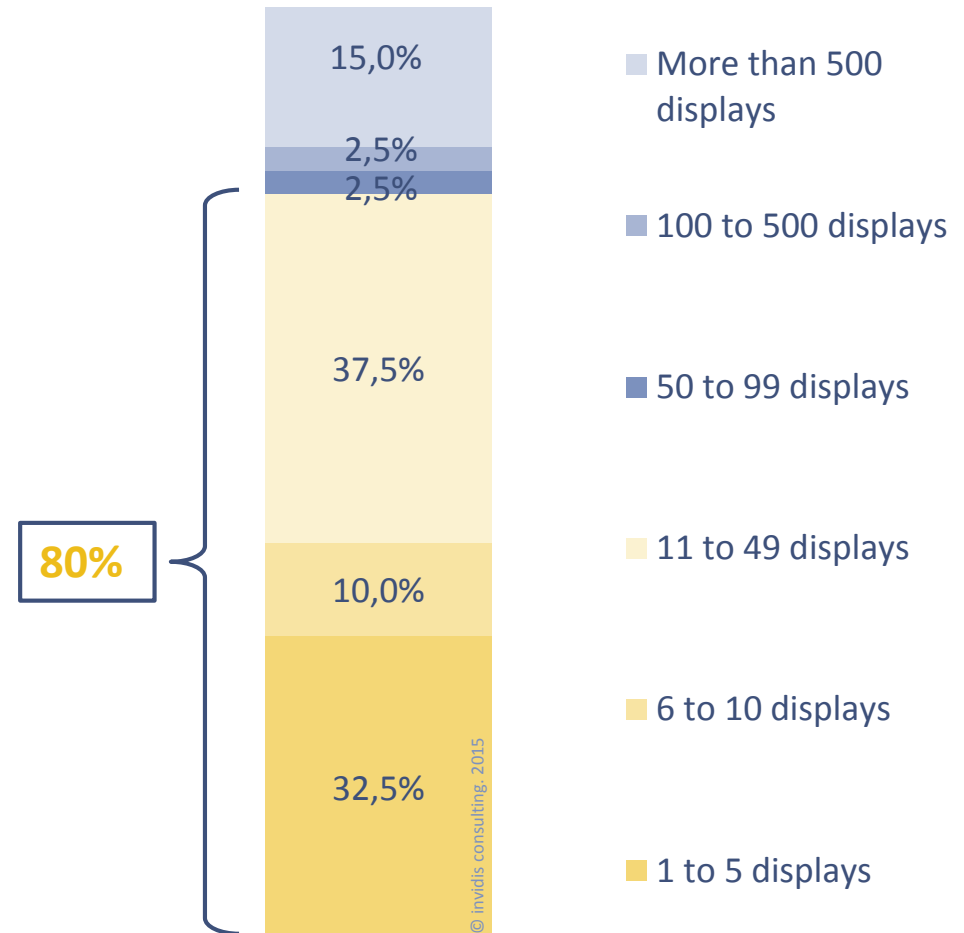


Fig. 4: DBCI Poland March/April 2015 „project sizes 2014“, n=11



Further research | Clear growth for DooH expected for the next 36 months

Forecast market share DooH in 36 months

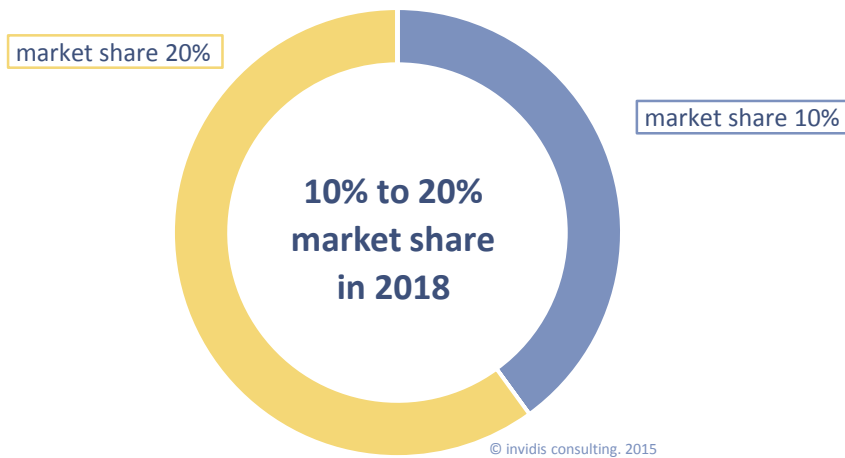


Fig. 5: DBCI Poland March | April 2015 "market share DooH in 36 months", n=10

Question: How high, do you estimate, will the market share of DooH within Out of Home grow in three years?

The market participants see a clear growth potential in DooH. They expect that the market share of DooH within Out of Home will reach between 10% and 20% by 2018

Reasons for future DooH growth

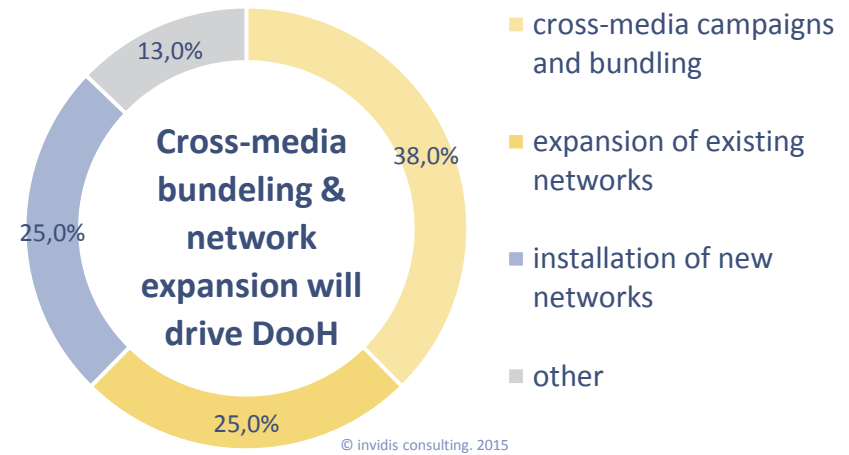


Fig. 6: DBCI Poland March | April 2015 "growth reasons DooH", n=9

Question: Which factors will primarily lead to an increasing market share of DooH?

On the one hand most growth will be achieved by bundling DooH with other digital media. On the other hand many market participants also see good potential for the installation of new and the expansion of existing networks



DBCI | Roadmap 2015 & Contact

2015	
January	
February	
March	
April	
May	← May/Jun. 2015/05/28
June	
July	← Jul./Aug. 2015/07/29
August	
September	← Sept./Oct. 2015/09/23
October	
November	← Nov./Dec. 2015/11/30
December	

- The next survey will take place in calendar week 18-19 of 2015
- The next planned publication date will be the 28th of Mai2015
- 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

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