

Poland  
May | June 2015

**DBCI**

The pulse of the Digital Signage  
and DooH industry

 Digital Signage & DooH  
Business Climate Index

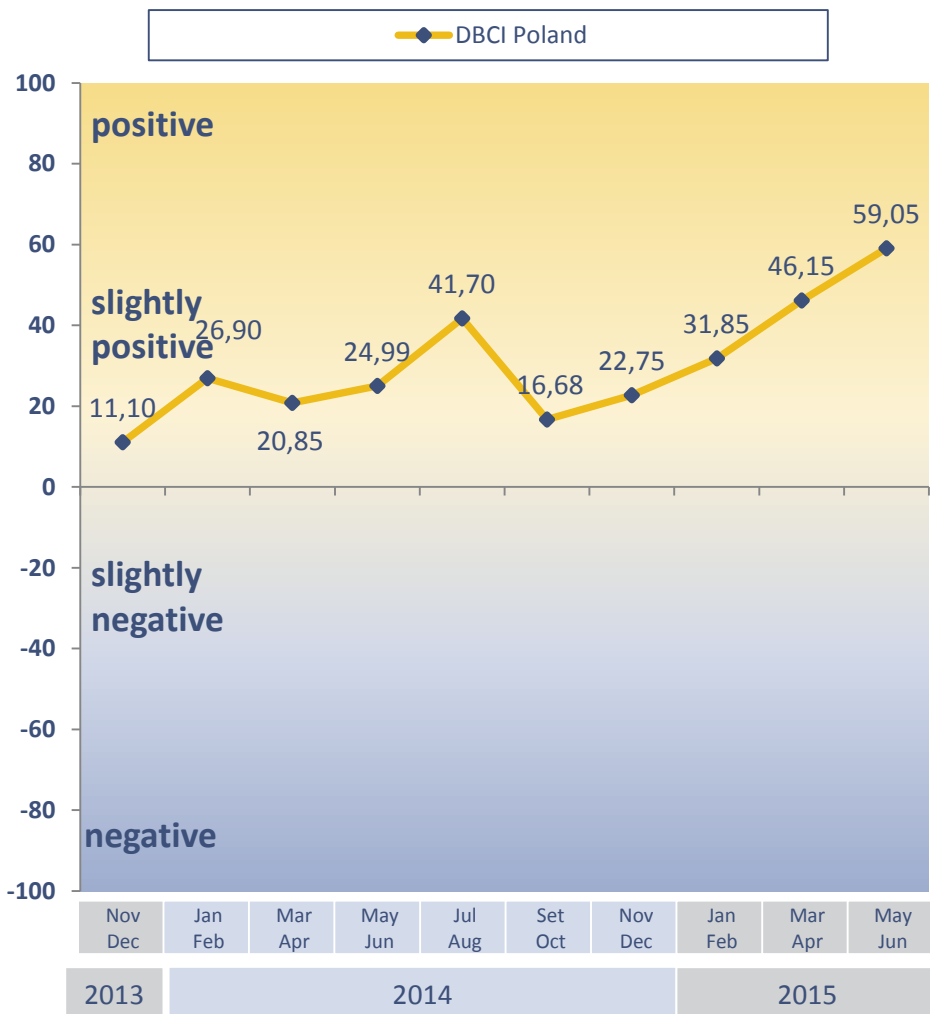
OVAB Europe cooperation partner Poland



invidis research  
2015 PL 300



## Digital Signage business sentiment remains on growth trend



- The Digital Signage Business Climate Index (DBCI) in Poland has further increased since the last poll in March. The Index grew from 46,15 base points by 12,90 points to 59,05 base points and reached an all time high
- The DBCI reflects the very positive current business sentiment of the Digital Signage industry in Poland
- Over 90% of the polled companies are satisfied or rate their current business climate with *good*. While only less than 10% see their situation as negative.
- With 73% the answers for *more favourable* business conditions within the next six month has further increased. More companies than in the first quarter expect definitive movement in the market until the end of the year.

### Further Research

- There are high hopes for the market potential for LED display technology. The Digital Signage and Digital-out-of-Home companies polled in the DBCI all see a high to very high potential for LED display technology in competition to LCD displays within the next 24 months.

Participants: n=12; Region: PL; Survey Period: 2015 calendar weeks 19-20

Abb. 1: DBCI Poland May | June 2015 „Index“, n=12



# Status Quo | Current business situation continues positive trend

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

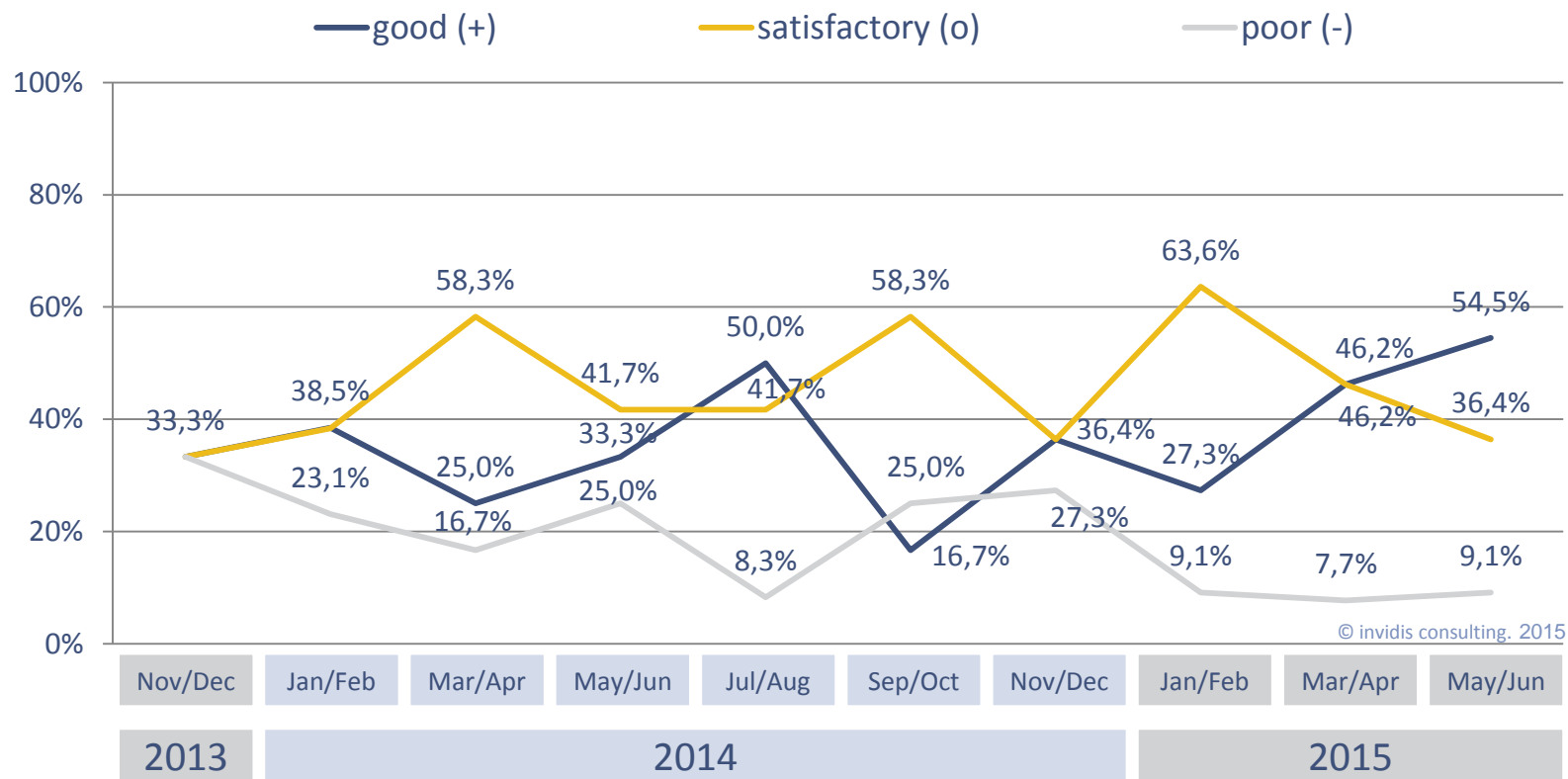


Fig. 2: DBCI Poland Poland May | June 2015 "business situation", n=12



# Expectations | Positive outlook for second half of 2015 is further increasing

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

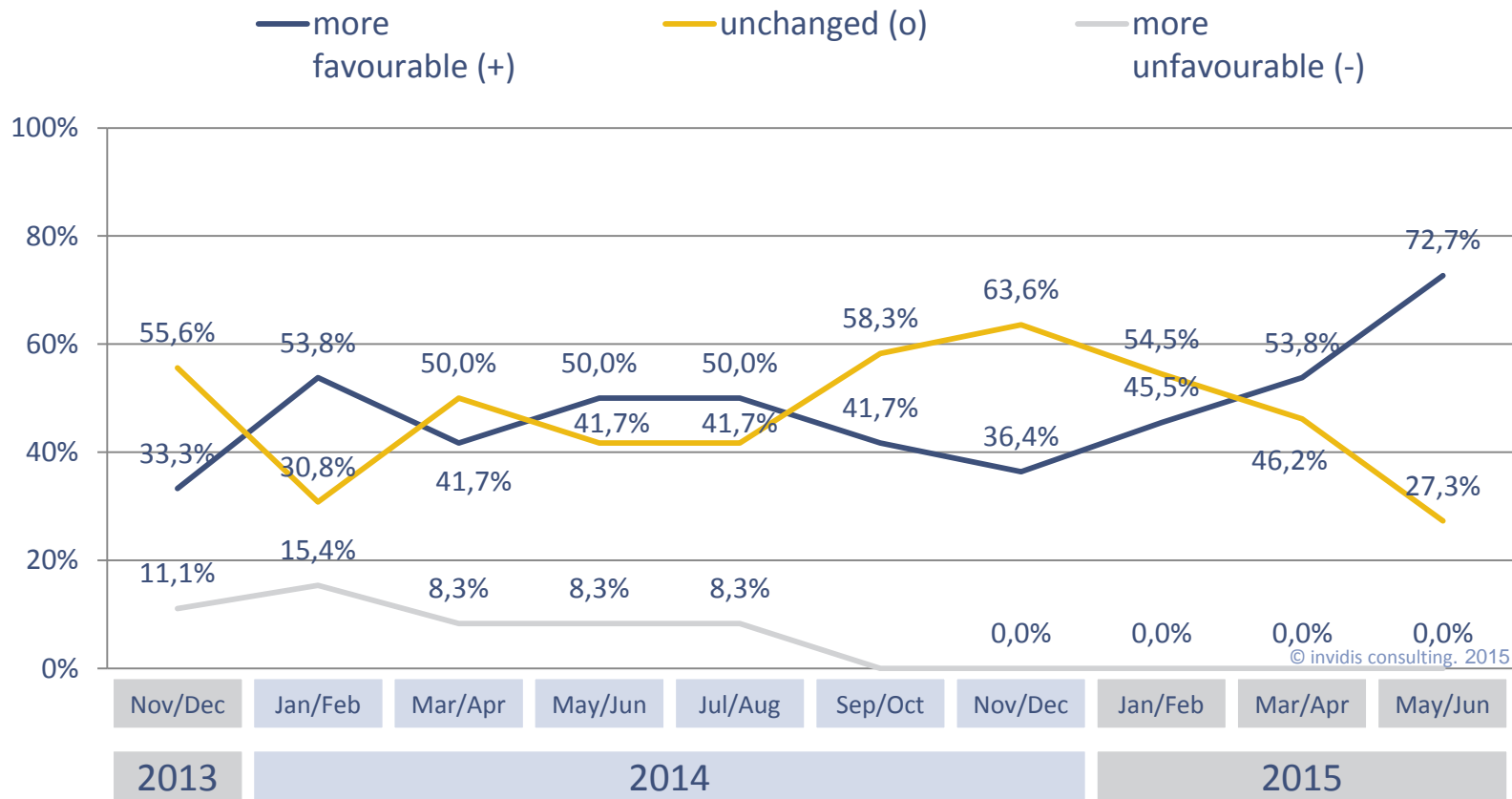


Fig. 3: DBCI Poland May | June 2015 "business expectations", n=12



## High hopes for market potential of LED display technology

**Question:** LED display technology has developed positively over the last years. Improved quality, smaller pixel pitch and lower prices have increased the acceptance in the market. How high do you see the potential for LED display technology in competition to LCD display technology in the next 24 months?

- The Digital Signage and Digital-out-of-Home companies polled in the DBCI all see a high to very high potential for LED display technology in competition to LCD displays within the next 24 months
- Over the last years, improvements in LED display technology have resulted in a lower pixel pitch. Together with a rapid increase in competition and hence falling prices the market potential of LED display technology will further increase in the next years. The big market players like Samsung and LG have noted this trend and duly seek a fast market entrance.
- Still the survey shows the highest potential is still attributed to outdoor installations. For indoor solutions the low viewing distance dictates a very low pixel pitch and hence high costs.

### LED display technology outlook 2016

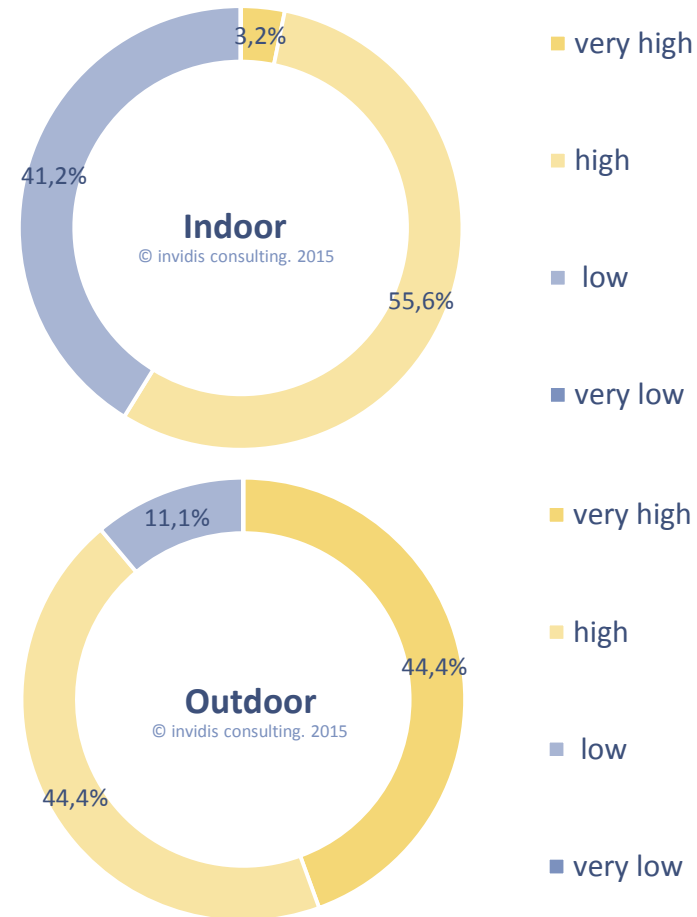


Fig. 4: DBCI Poland May | June 2015 "LED display technology outlook 2016", n=10



## DBCI | Roadmap 2015 & Contact

2015
January
February
March
April
May
June
July
August
September
October
November
December

← Jul./Aug. | 2015/07/29

← Sept./Oct. | 2015/09/23

← Nov./Dec. | 2015/11/30

- The next survey will take place in calendar week 28-29 of 2015
- The next planned publication date will be the 29<sup>th</sup> of July 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 | Research Analyst  
 invidis consulting GmbH  
 Rosenheimer Str. 145e  
 81671 München  
[Daniel.Russell@invidis.com](mailto:Daniel.Russell@invidis.com)  
 Phone: +49 89 2000416-21  
 Mobile: +49 151 62438503  
 Fax: +49 1805 5224 301