

Poland
January | February
2016

DBCI

The pulse of the Digital Signage
and DooH industry



Digital Signage & DooH
Business Climate Index

OVAB Europe cooperation partner Poland



**DIGITAL SIGNAGE
SUMMIT @ISE**



invidis research
2016 PL 100



Digital Signage market back on track with positive sentiment at the start of the year



- The digital Signage Business Climate Index Poland has increased strongly. It grew by 26,40 base points from 27,75 points to 54,15 base points. That is an almost 100% increase in confidence from the market participants since November. Also encouraging for the industry is the strong year-on-year growth since January 2015.
- The current business situation is very positive, as all polled companies are satisfied or better. At the same time the optimism towards the near future has seen a strong recovery since the last survey. Now almost 60% of all polled companies expect a *more favourable* situation for their products and services in the Digital Signage and DooH market within the next six months.
- The IT sector in Poland is forecasted to have very good single digit growth in 2016. However, some market participants are concerned that new government initiatives on taxation in the important sectors retail and banking could slow investments there.
- One big trend in the Digital Signage market in 2016 will be interactivity and mobile integration. The polled companies also see high potential for Android based solutions and larger installations, either via bigger display sizes or video walls.

change

DBCI 2016 #1

year-on-year

+70,0%

previous survey

+95,2%

Fig. 1: DBCI Poland January | February 2016 „Index“, n=12

Participants: n=12; Region: PL; Survey Period: 2016 calendar weeks 2-3



Current business situation & outlook recover to an optimistic level

Current business Situation | Poland | January/February 2016 Expectations | Poland | January/February 2016

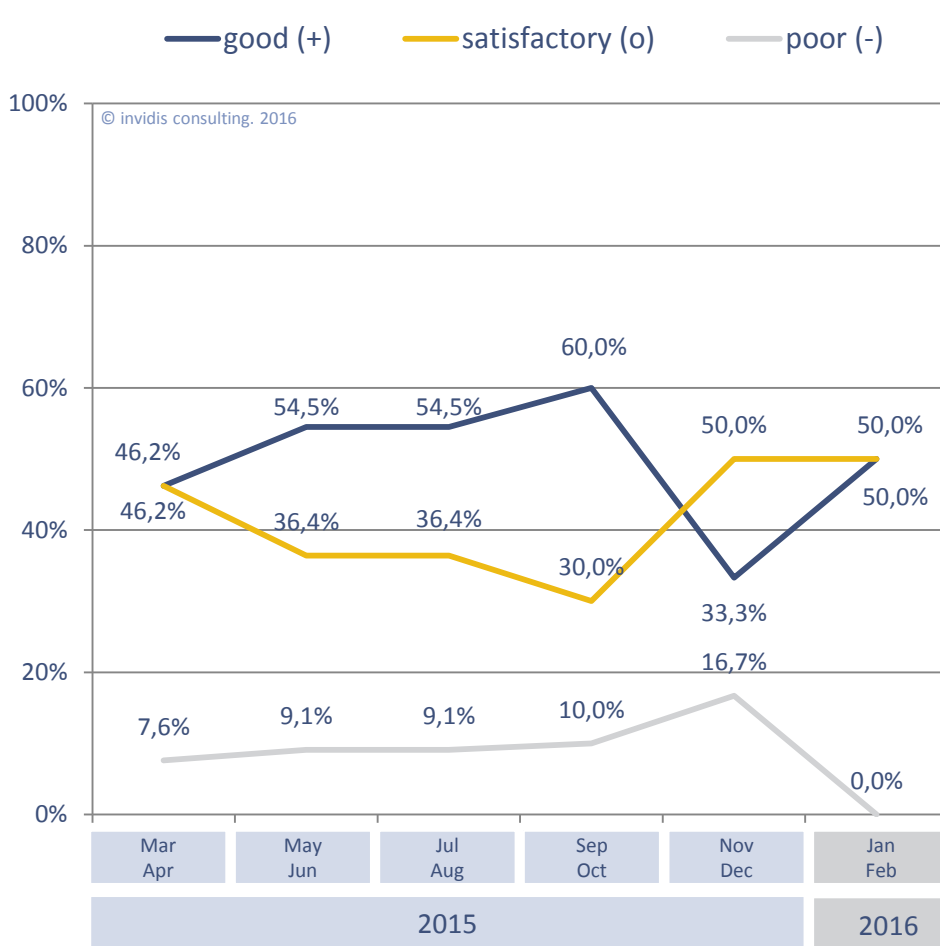


Fig. 2: DBCI Poland January | February 2016 „Business Situation“ rolling 12 months, n=12

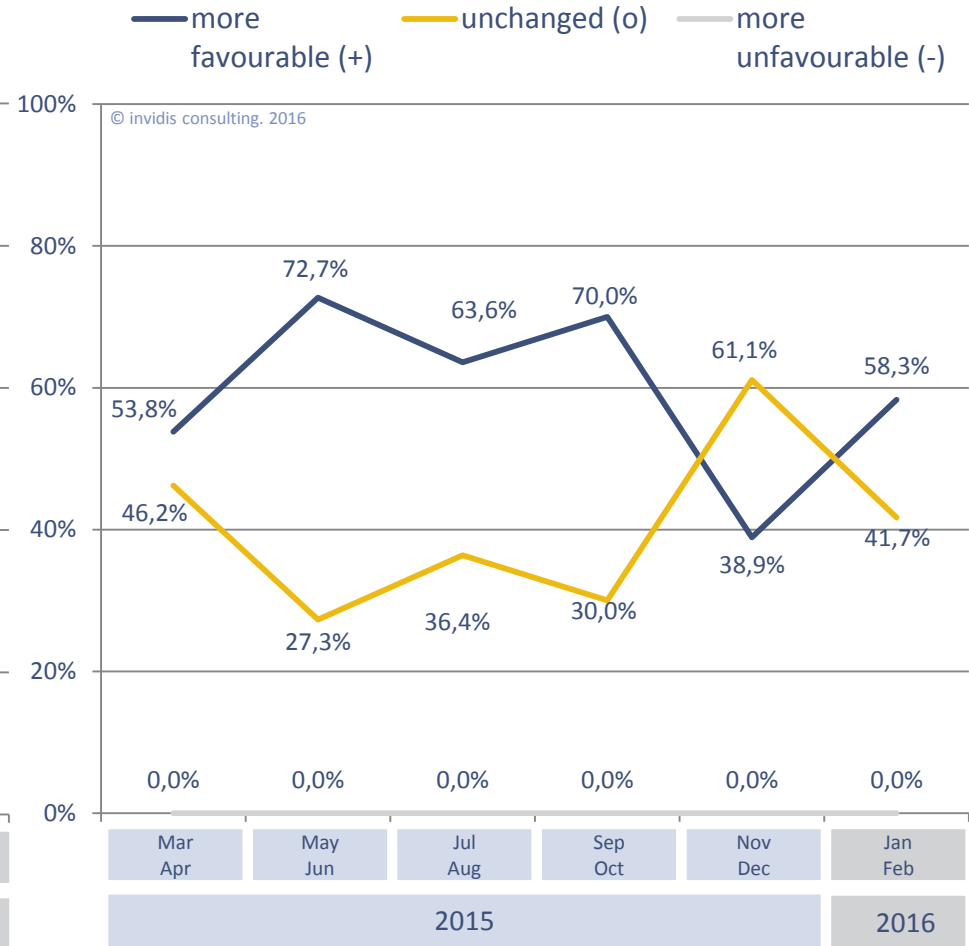


Fig. 3: DBCI Poland January | February 2016 „Expectations“ rolling 12 months, n=12



Hirings 2015 | Digital Signage creates many new jobs

- **70%** of all companies in the Digital Signage Market have hired new staff in the last year.
- In 2015 **up to 50 new jobs** were created in the Digital Signage market in Poland.
- Now this unbroken positive trend in the IT industry overall has developed in a definite shortage of qualified personal. Companies are more and more concerned, how they can match recruiting with their growth strategy.
- As a whole there is a high demand for qualified personnel. Due to the digital transformation and the increasing integration of digital technologies the demand for personnel on a management level with new qualifications is very high (e.g. key account and project manager).
- The increasing expansion in vertical markets leads to a demand for more professionals from different industry branches by Digital Signage companies.

Company growth in new jobs created 2015

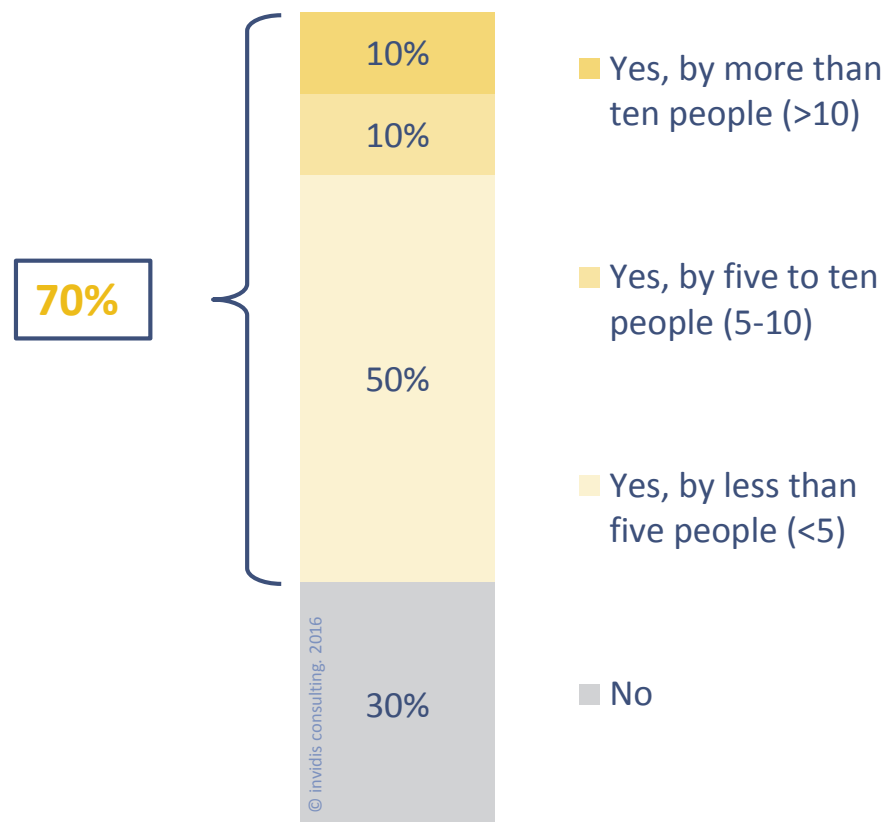


Fig. 4: DBCI Poland January/February 2016 "Hirings 2015", n=10



Roadmap 2016 & Contact

2016	
January	
February	
March	← DBCI Mar./Apr. WN14
April	
May	← DBCI May./Jun. WN23
June	
July	← DBCI Jul./Aug. WN32
August	
September	← DBCI Sep./Oct. WN41
October	
November	← DBCI Nov./Dec. WN50
December	

- The next survey will take place in calendar weeks 12-13
- The next planned publication date will be in week 15
- 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 2016. For further information please contact Daniel Russell.

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DSS | The Digital Signage Summit series

**DIGITAL SIGNAGE
SUMMIT @ISE**

- «Digital Signage Summit» new brand for event series
 - ❖ DSS Europe: 23-24 June 2016
 - ❖ DSS MENA: 19-20 Sep 2016
 - ❖ DSS Russia: 1-2 Nov 2016

**DIGITAL SIGNAGE
SUMMIT EUROPE**

- DSS is a dedicated confex event platform - conference and exhibition - featuring digital signage and Dooh topics

**DIGITAL SIGNAGE
SUMMIT RUSSIA**

- Each event features visionary and best practise presentations as well as panel discussions concerning the most recent state of the art projects, trends and drivers of the industry

**DIGITAL SIGNAGE
SUMMIT MENA**

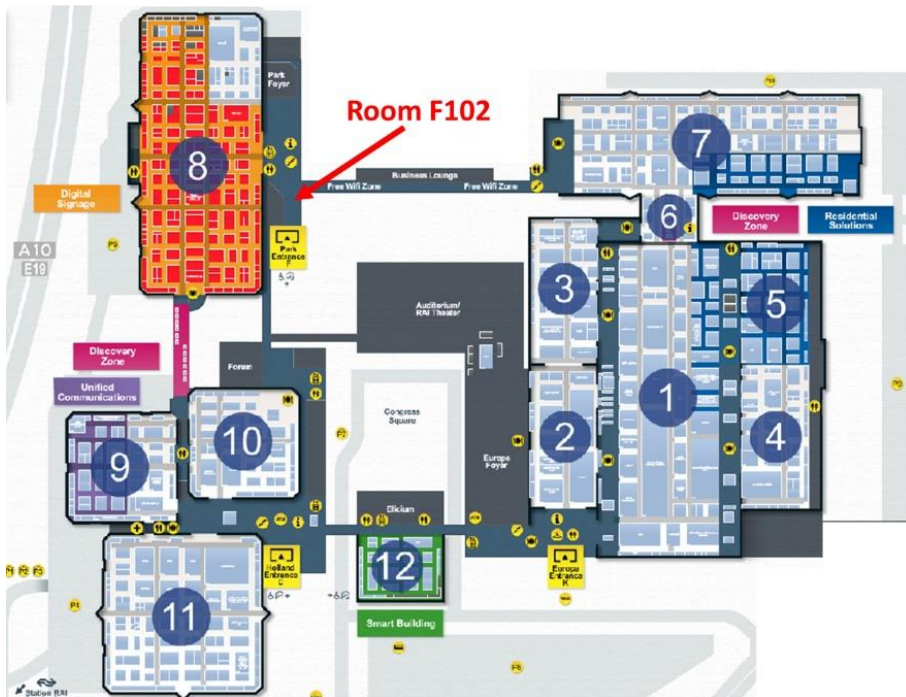
- All events also have a dedicated exhibition space for product presentation and networking opportunities



DSS | Digital Signage Summit Kick-off Sessions @ ISE 2016

**DSS Kick-off Sessions
@ ISE 2016**

**Integrated
Systems
Europe**
9-12 February 2016
Amsterdam, RAI, NL



- Together with the ISE and in cooperation with Digital Signage Summit Europe, invidis consulting will be present at [Integrated Systems Europe](http://Integrated Systems Europe 2016) 2016 (9 – 12 February 2016, Amsterdam) with several digital signage events.

- **ISE 2016 Presentations invidis consulting**
Every Day at 12:00, Commercial Theatre Hall 8

- **Digital Signage Summit Market Briefings**
Every Day at 14:00, Room F102

- **Digital Signage Summit Guided Tours**
Every Day at 14:30, Room F102

- **More here:**
invidis.de/ise-2016-digital-signage-ise-program/