

Poland  
May | June 2016

**DBCI**

The pulse of the Digital Signage  
and DooH industry



Digital Signage & DooH  
Business Climate Index

DSF Europe cooperation partner Poland



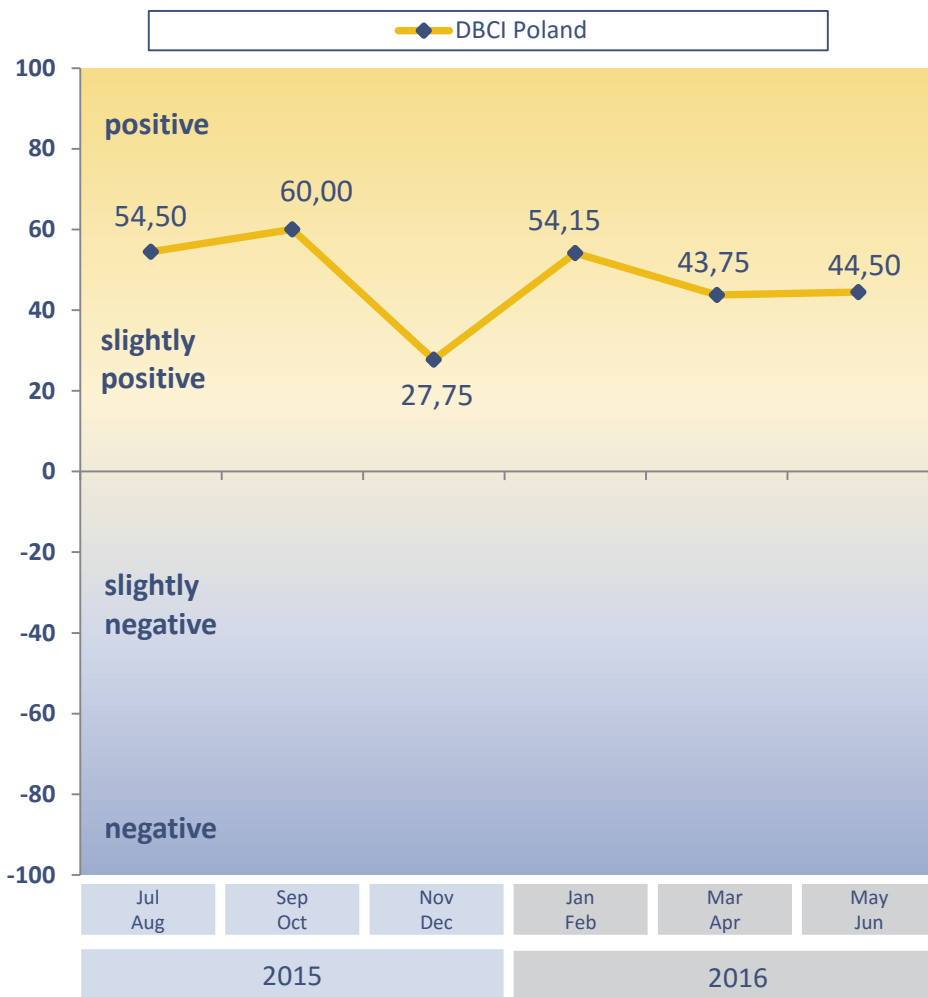
23-24 June 2016, Munich, Germany

invidis research  
2016 PL 300





# Digital Signage market business sentiment in May stabilised on a positive level



- The digital Signage Business Climate Index in Poland has increased marginally. The index grew by 0,75 base points from 43,75 points to 44,50 base points.
- The current business situation is very good, as almost 60% of the polled companies have answered. However also the negative answers have grown since the last survey in March.
- Similarly the optimism towards the near future has seen an increase as simultaneously the negative outlook. The overall comparison of the index to the same period in the last year is still negative. However the volatility of the index in relation to the previous survey was stopped.
- As GDP growth is expected to become more dynamic over the course of the next two years, rising employment and wages, higher social transfers and low energy prices will support faster consumption growth and investments in the retail sector.
- Most Digital Signage solutions have been reliant on Windows as OS in 2015. However Linux based solutions are increasingly implemented

change  
DBCI 2016 #3

year-on-year

-24,6%

previous survey

+1,7%

Fig. 1: DBCI Poland May | June 2016 „Index“, n=9

Participants: n=9; Region: PL; Survey Period: 2016 calendar weeks 19-20



# Strong positive increase of current business situation & outlook

Current business Situation | Poland | May/June 2016

Expectations | Poland | May/June 2016

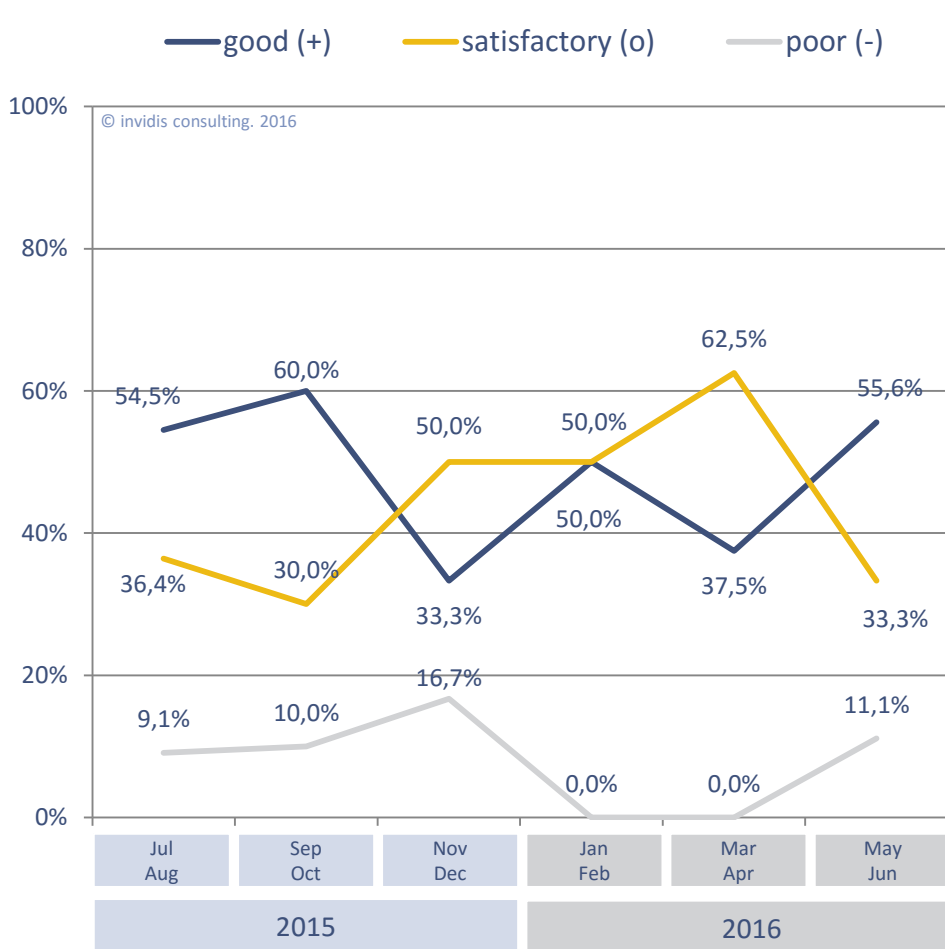


Fig. 2: DBCI Poland May | June 2016 „Business Situation“ rolling 12 months, n=9

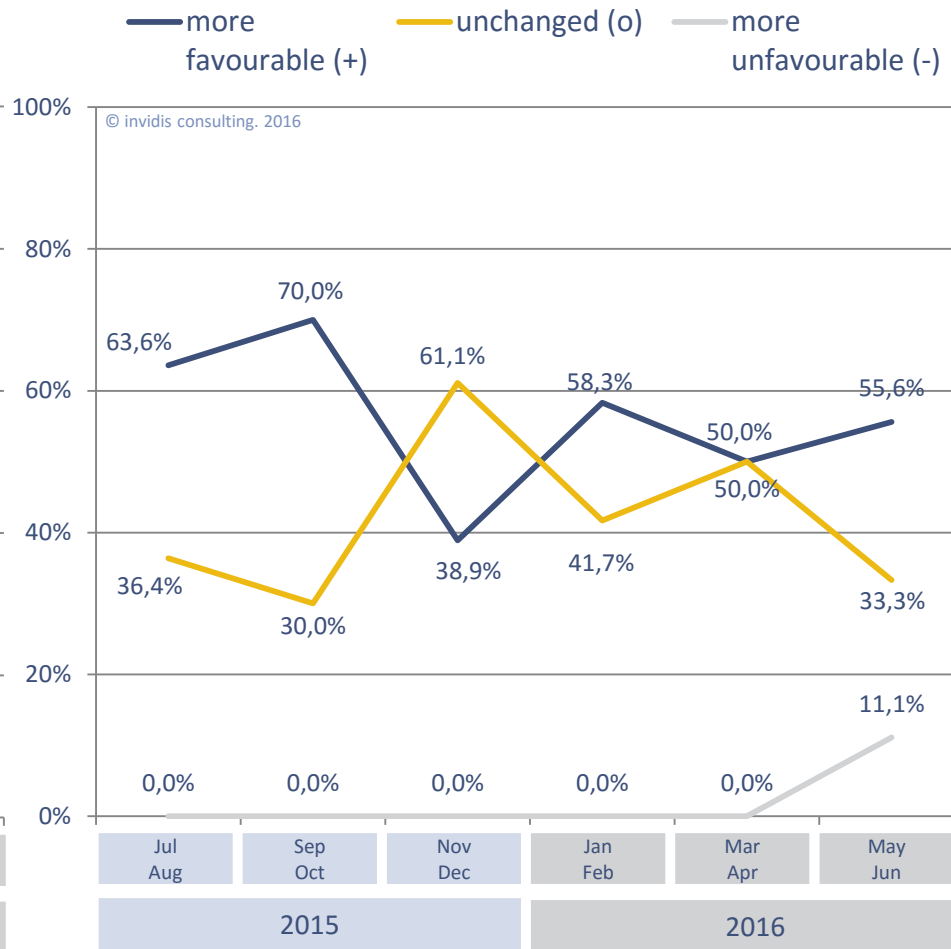


Fig. 3: DBCI Poland May | June 2016 „Expectations“ rolling 12 months, n=9



# Windows in first, Linux challenges & Android picks up speed

**Question:** How high was the percentage of operating systems used in Digital Signage Projects in 2015?

Windows is implemented most frequently with Digital Signage projects. However other operating systems have significantly gained ground in the last two years.

Particularly Linux based installations are becoming more and more popular. Here cost and security issues are dictating the decisions. With Digital Signage installations becoming more varied in size and required performance, the appliances running on a non-PC architecture like Raspberry Pi, Cisco, BrightSign, Spinetix etc. are more widely integrated.

Cost effective systems operating on Android or SoC basis currently have the highest dynamic in the market. Still many security and performance issues remain.

Apple operating systems could establish a robust nice segment. However, many managers with IT responsibility dismiss it as an operating system for Digital Signage installations.

Market share of IT operating systems in Digital Signage installations 2015

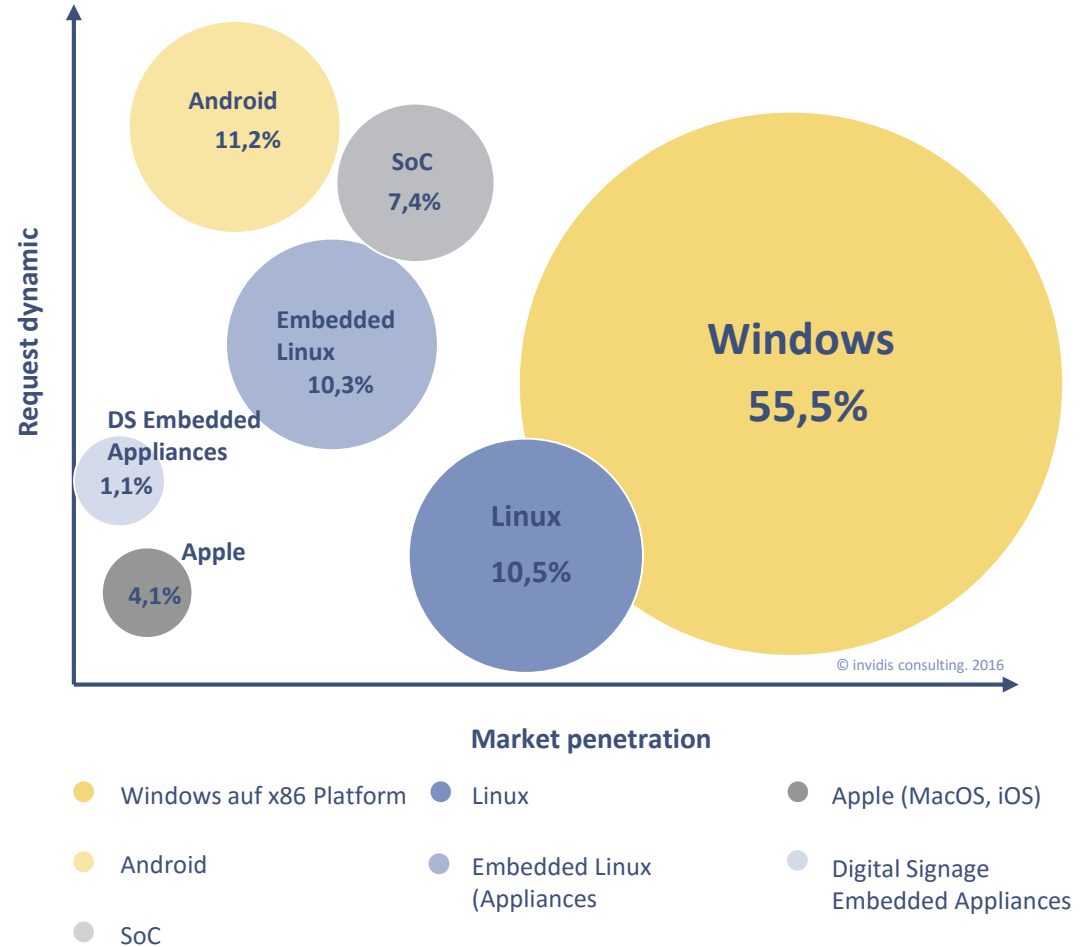


Fig. 4: DBCI Poland May | June 2016 "operating systems 2015", n=9



## Roadmap 2016 & Contact

<b>2016</b>	
January	
February	
March	
April	
May	
June	
July	← <b>DBCI Jul./Aug.   WN32</b>
August	
September	← <b>DBCI Sep./Oct.   WN41</b>
October	
November	← <b>DBCI Nov./Dec.   WN50</b>
December	

### OVAB Europe will be rebranded as **Digital Signage Federation Europe** starting with the 1<sup>st</sup> April 2016

- The next survey will take place in calendar weeks 30-31
- The next planned publication date will be in week 32
- 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» new brand for event series
- DSS is a dedicated confex event platform - conference and exhibition - featuring digital signage and DooH topics
- 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
- All events also have a dedicated exhibition space for product presentation and networking opportunities

