

Poland

September | October 2016

DBCI

The pulse of the Digital Signage
and DooH industry



Digital Signage & DooH
Business Climate Index

DSF Europe cooperation partner Poland



invidis research
2016 PL 500





The Polish Digital Signage market shows very stable good business sentiment

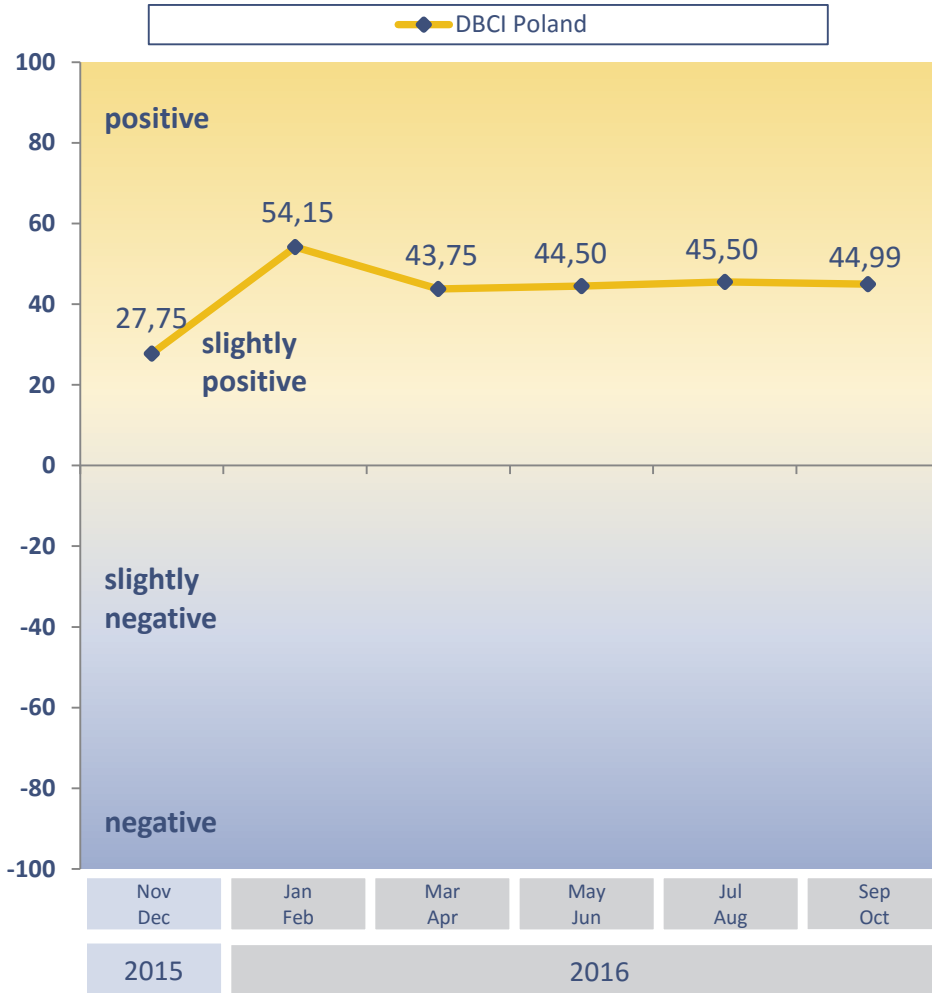


Fig. 1: DBCI Poland September | October 2016 „Index“, n=10

Participants: n=10; Region: PL; Survey Period: 2016 calendar weeks 38-39

- The Digital Signage Business Climate Index in Poland is on a very stable positive level over the full year 2016. The index has seen a nominal decrease of 0,51 base points from 55,50 points to 44,99 base points. In total the Index is down by +25,0% year-on-year and -1,1% compared to the previous survey.
- The current business situation shows a slightly more concerned sentiment - with positive and neutral ratings in decline, while the negative ratings have risen to 10%.
- However, the outlook towards the near future registered increasingly positive expectations for a more favourable business situation. Currently 60% of the surveyed companies are expecting a better business situation for their products and services within 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
- The DooH industry sees a low growth potential in programmatic buying for DooH until 2020.

	year-on-year	previous survey
change	-25,0%	-1,1%
DBCI 2016 #5		



More conservative current business situation & outlook

Current business Situation | Poland | September/October 2016

Expectations | Poland | September/October 2016

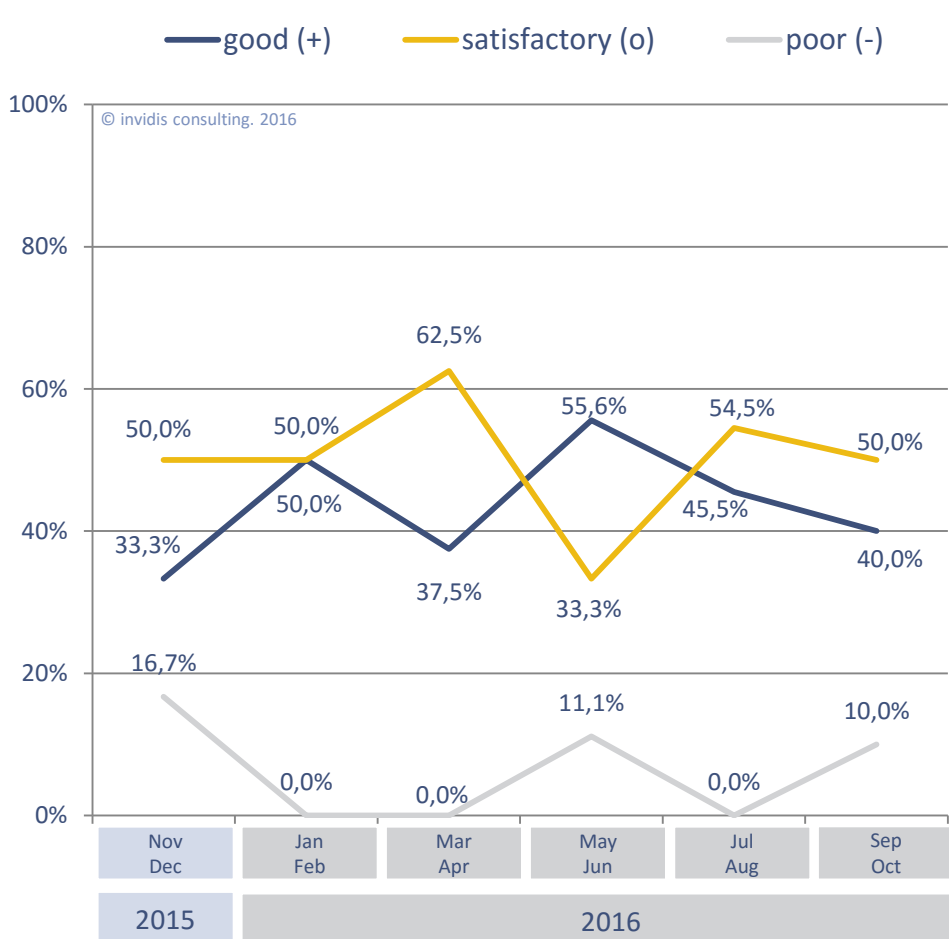


Fig. 2: DBCI Poland September | October 2016 „Business Situation” rolling 12 months, n=10

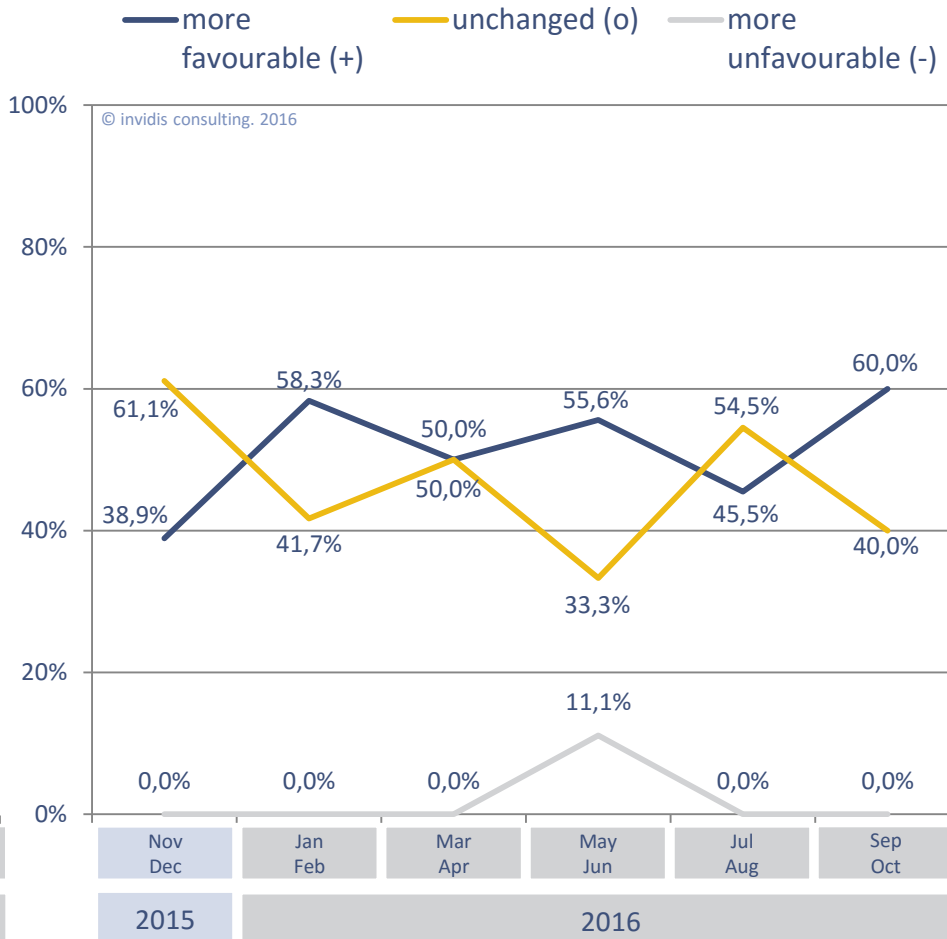


Fig. 3: DBCI Poland September | October 2016 „Expectations” rolling 12 months, n=10



Further research | The SMB sector drives Digital Signage revenues

Question: How many projects did your company roll out in the following categories in 2015?

- Three quarters of all DS projects in 2015 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 12% of all Digital Signage networks are 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.
- Over the last two years the split has remained similar, only the percentage of large scale projects has increased drastically from 2% to 13%..

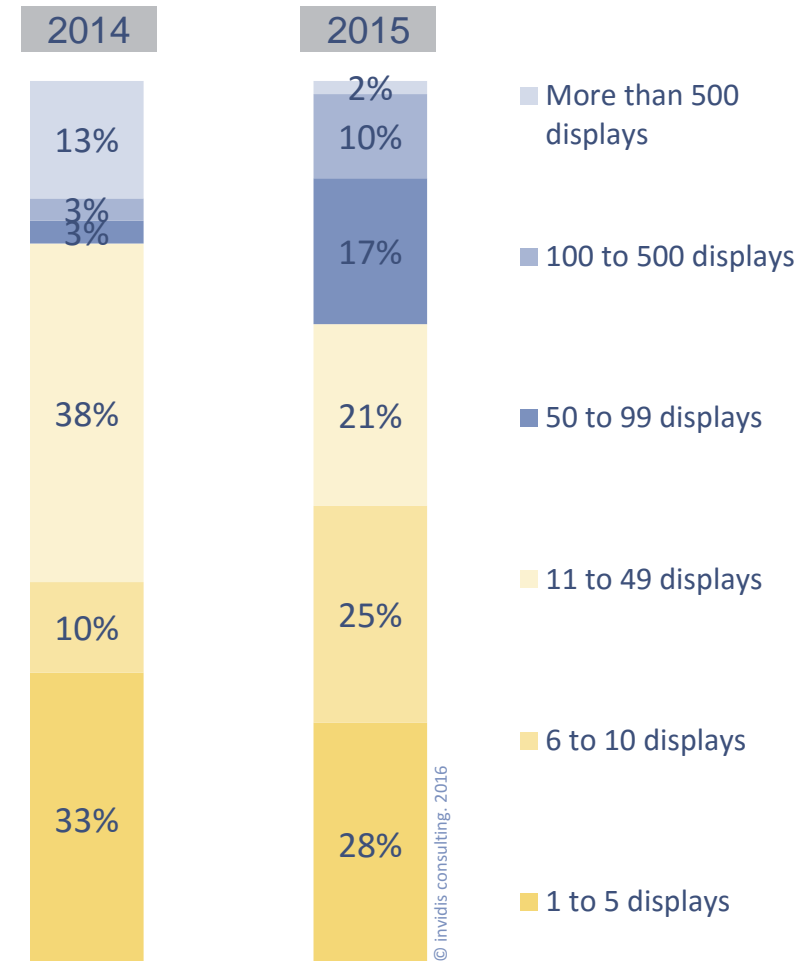


Fig. 4: DBCI Poland September | October 2016 „project sizes 2014-15“, n=10



Roadmap 2016 & Contact

2016
January
February
March
April
May
June
July
August
September
October
November
December

← DBCI Nov./Dec. | WN50

OVAB Europe will be rebranded as Digital Signage Federation Europe starting with the 1st April 2016

- The next survey will take place in calendar weeks 48-49
- The next planned publication date will be in week 50
- The DBCI is polled by invidis consulting and published in cooperation with DSF 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



THE LEADING DIGITAL SIGNAGE AND DIGITAL OUT OF HOME STRATEGY CONFERENCE 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

A JOINT VENTURE BETWEEN:

Integrated Systems Events

