

Poland  
1<sup>st</sup> Quarter

**DBCI**

The pulse of the Digital Signage  
and DooH industry



Digital Signage & DooH  
Business Climate Index

DSF Europe cooperation partner Poland



invidis research  
2017 PL 100



**invidis**  
CONSULTING



**digital  
signage  
summit  
europe**

05-06 JULY 2017  
MUNICH  
GERMANY



## Drastic decline in business sentiment on the Polish Digital Signage market

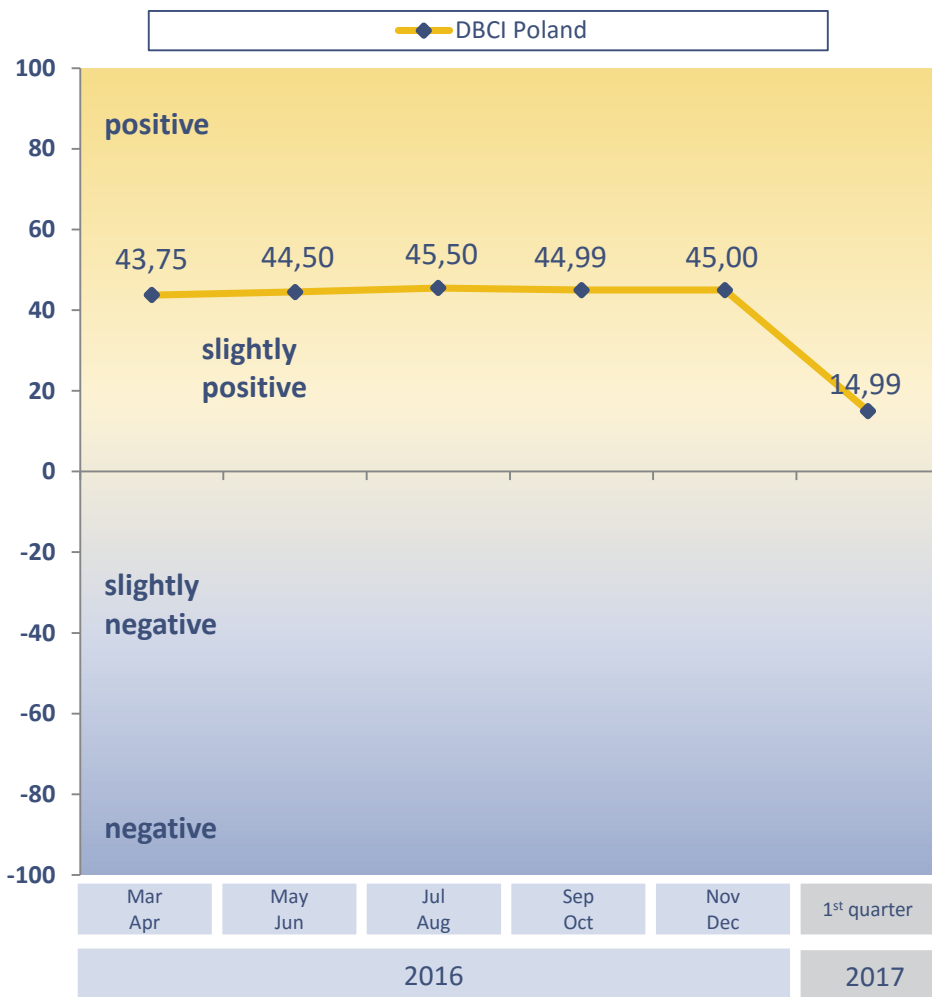


Fig. 1: DBCI Poland 1st Quarter 2017 „Index“, n=10

Participants: n=10; Region: PL; Survey Period: 2017 calendar weeks 2-3

- The Digital Signage Business Climate Index in Poland has registered a strong decline from an overall very stable positive level over the full year 2016. The index has decrease by 30,01 base points from 45,00 points to 14,99 base points. In total the Index is up down by -72,3% year-on-year and by -66,7% compared to the previous survey.
- The current business situation shows a strong negative trend with the good ratings decreasing in favour of the negative ones.
- Also the outlook towards the near future registered increasingly conservative and negative expectations for the future economic development. Resulting in currently only 40% of the surveyed companies expecting a better business situation for their products and services within the next six months.

### Further Research

- 50% of all companies in the Digital Signage market in Poland have hired new staff in 2016. In total between 20-30 new jobs were created.





# More negative current business situation & robust outlook

Current business Situation | Poland | 1<sup>st</sup> Quarter 2017

Expectations | Poland | 1<sup>st</sup> Quarter 2017

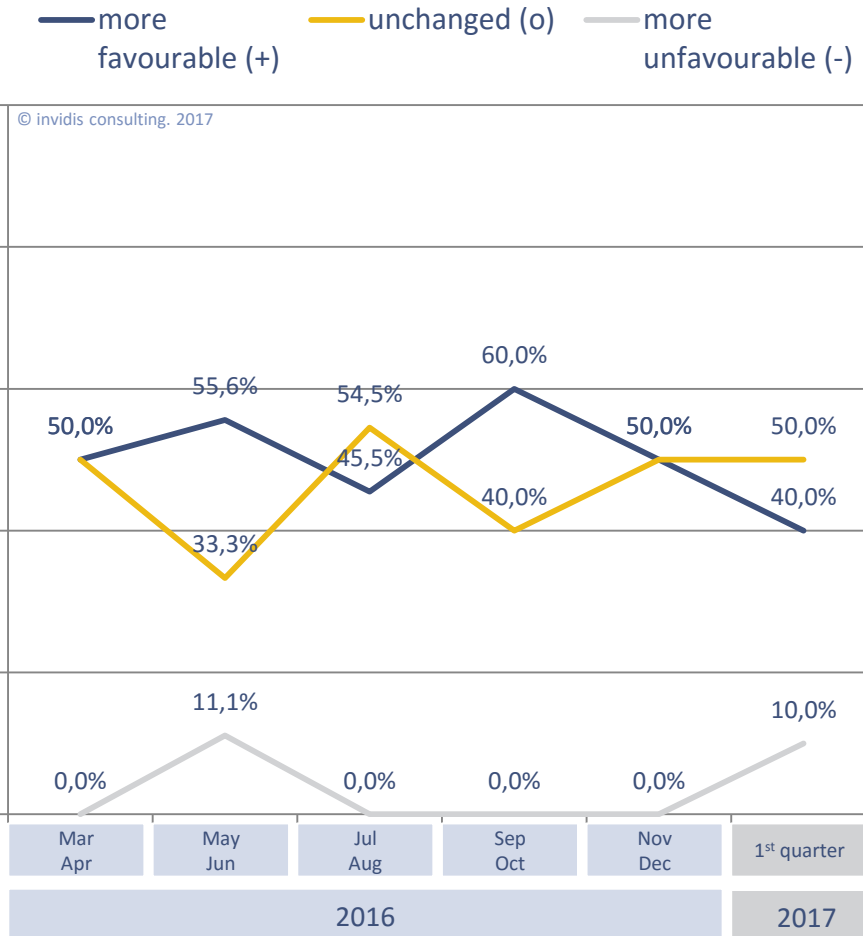
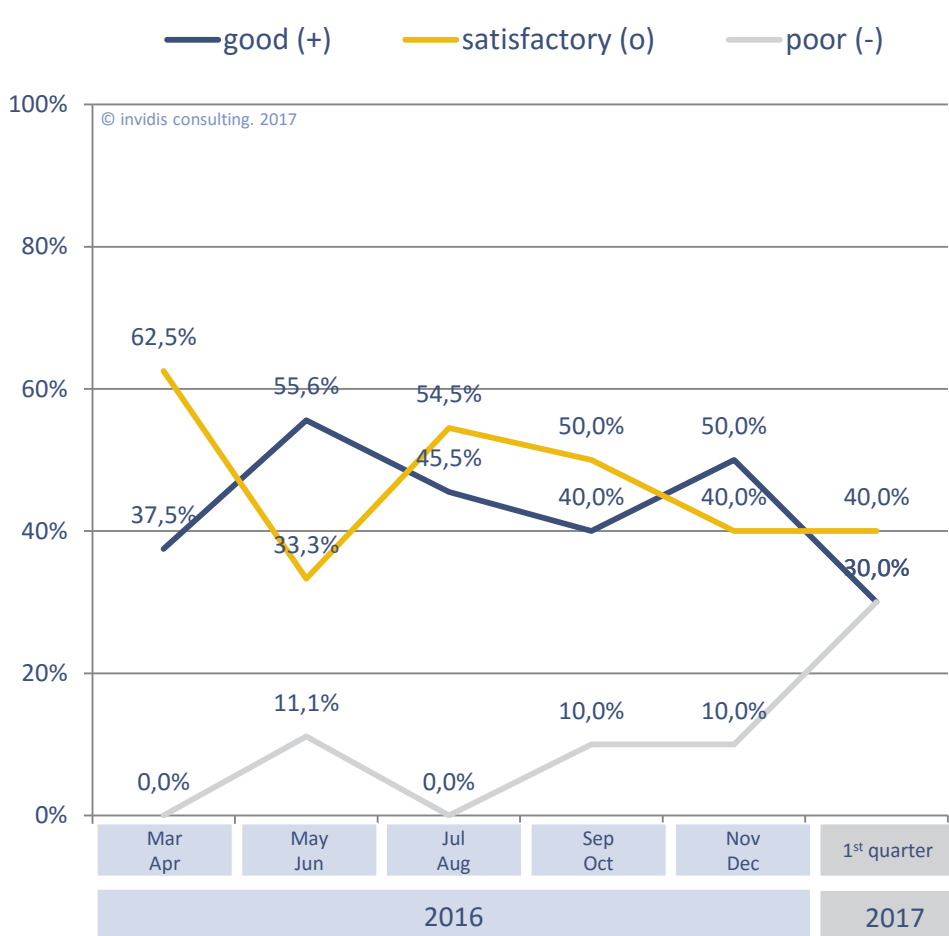


Fig. 2: DBCI Poland 1<sup>st</sup> Quarter 2017 „Business Situation“ rolling 12 months, n=10

Fig. 3: DBCI Poland 1<sup>st</sup> Quarter 2017 „Expectations“ rolling 12 months, n=10



## Hirings 2016 | Digital Signage creates many new jobs

- 50% of all companies in the Digital Signage market in Poland have hired new staff in 2016. In total between 20-30 new jobs were created.
- The digital transformation in private and business life is responsible for an unbroken positive trend in the IT industry. Overall this has developed into 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 digital experts on all management levels. Particularly qualified project managers and key account positions are in demand. But also technicians, programmers and administrators can be difficult to hire in highly industrialised regions where the competition for talent is strong.
- The increasing expansion in vertical markets by Digital Signage companies leads to a demand for more professionals from different industry branches.

Company growth in new jobs created 2016

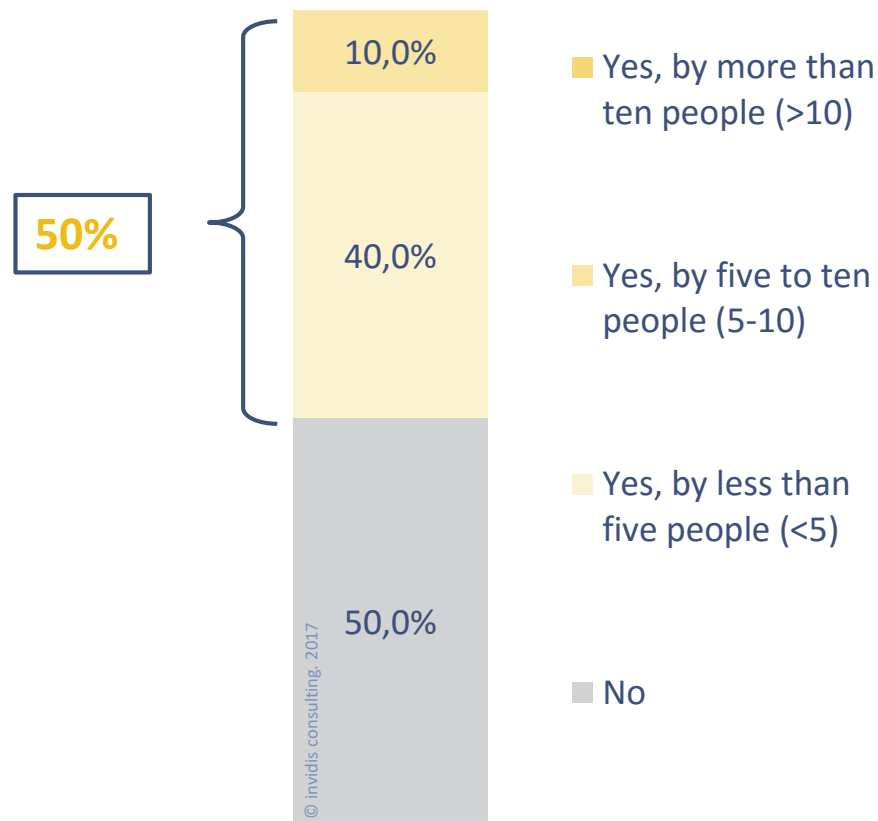


Fig. 4: DBCI Poland 1st Quarter 2017 "Hirings 2016", n=15



## Roadmap 2017 & Contact

<b>2017</b>	
January	
February	
March	
April	
May	← 2 <sup>nd</sup> quarter   2017
June	
July	
August	← 3 <sup>rd</sup> quarter   2017
September	
October	
November	← 4 <sup>th</sup> quarter   2017
December	

- The DBCI has recalibrated its iteration from a two month period to a three month period starting in 2017
- The next survey will take place in calendar weeks 14-15 of 2017. The next planned publication date will be the first week of May 2017
- 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 2017. For further information please contact Daniel Russell.

### **invidis consulting**

invidis is a renowned boutique consulting and research house based in Munich. Delivering actionable information and advise to customers across EMEA.

### **Contact**

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- 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
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  - DSS Europe | Munich: 5.-6. July 2017
  - DSS MENA | Dubai: September 2017
  - DSS Russia | Moscow: October 2017
  - DSS Africa | Johannesburg: October 2017
- More information at [digitalsignagesummit.org](http://digitalsignagesummit.org)