

Russia

November | December 2014

**DBCI**



Digital Signage & DoOH  
Business Climate Index

The pulse of the Digital Signage  
and DoOH industry



**invidis**  
CONSULTING

invidis research  
2014 RU 600

 General political-economic climate considerably impacts Digital Signage market

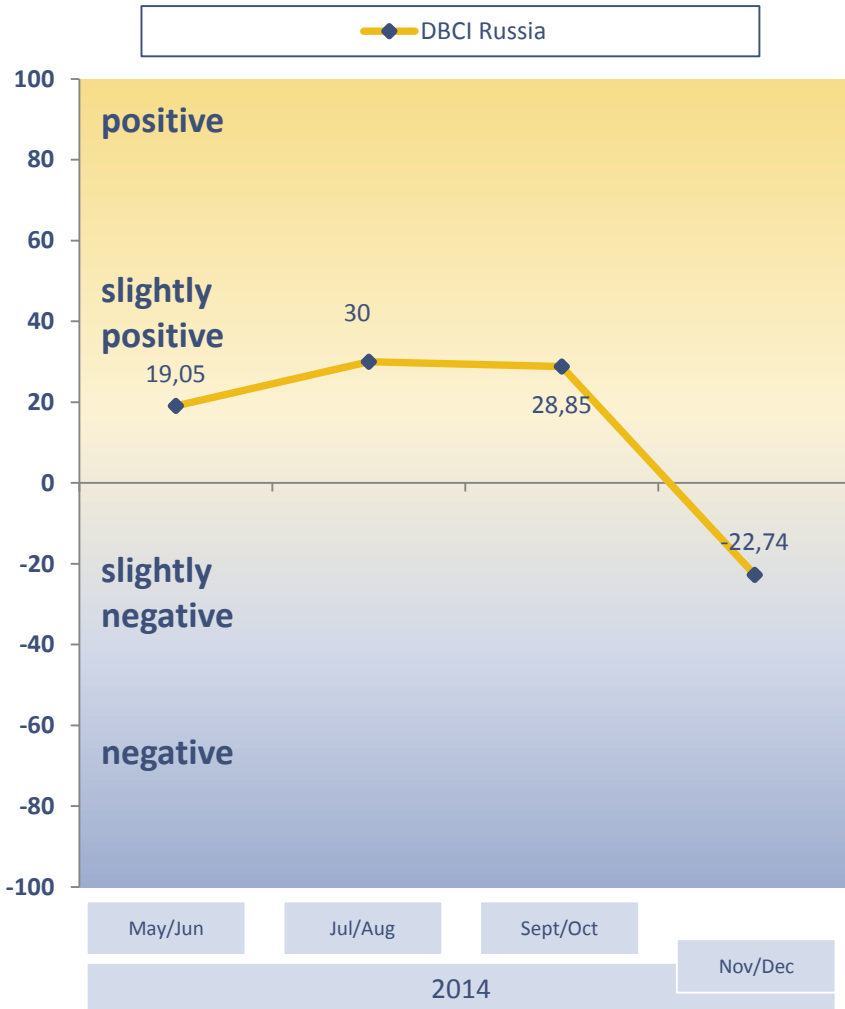


Fig. 1: DBCI Russia November/December 2014 „Index Russia“, n=22

- The digital Signage Business Climate Index Russia has been polled for the fourth time in 2014. Since the last survey in September, the index has dropped dramatically from 28,85 by 51,59 base points to -22,74 base points
- The current business situation is still satisfactory, with the expectations for the next six months highly negative
- Amid the current volatile political situation and its economic consequences the Digital Signage market in Russia has a negative outlook on further growth potential for H1 2015
- The tumbling currency exchange rate of the Ruble and a freeze in government financed projects has resulted in many tenders being put under revision or being postponed

**Further research:**

- Falling hardware prices and availability of plug-and-play solutions resulted in a high demand for entry-level Digital Signage
- The Russian industry for digital OoH media favours the nomenclature Adscreen (Рекламный экран)

Survey facts

- Participants: n=22
- Region: Russia
- Time frame: 2014 calendar weeks 45-46

 Digital Signage market still satisfied with the current business situation

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

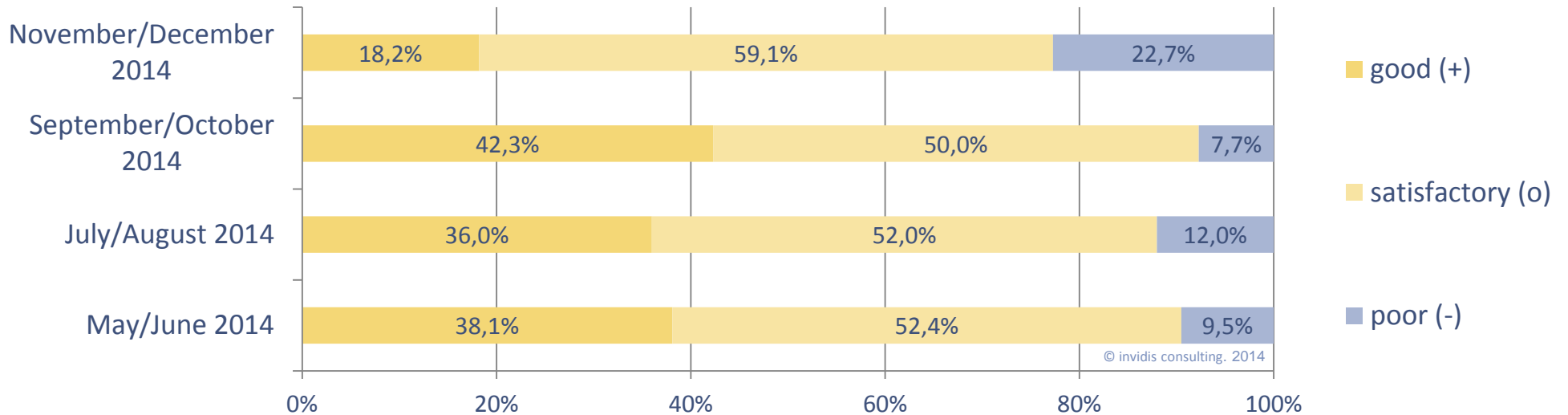


Fig. 2: DBCI Russia November/December 2014 "business situation", n=22



## Negative outlook dominates for the new year

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

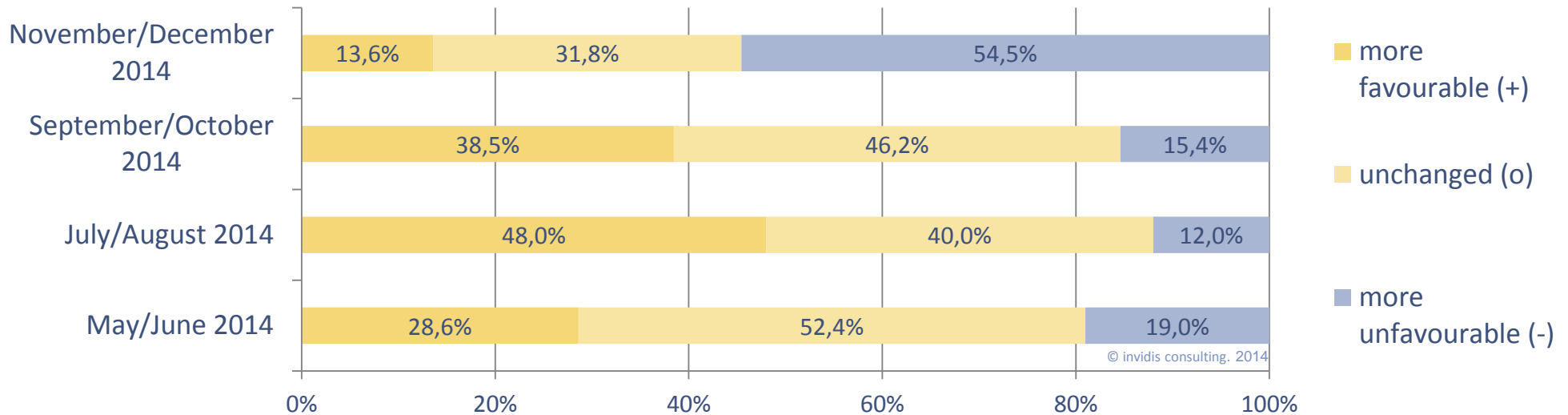
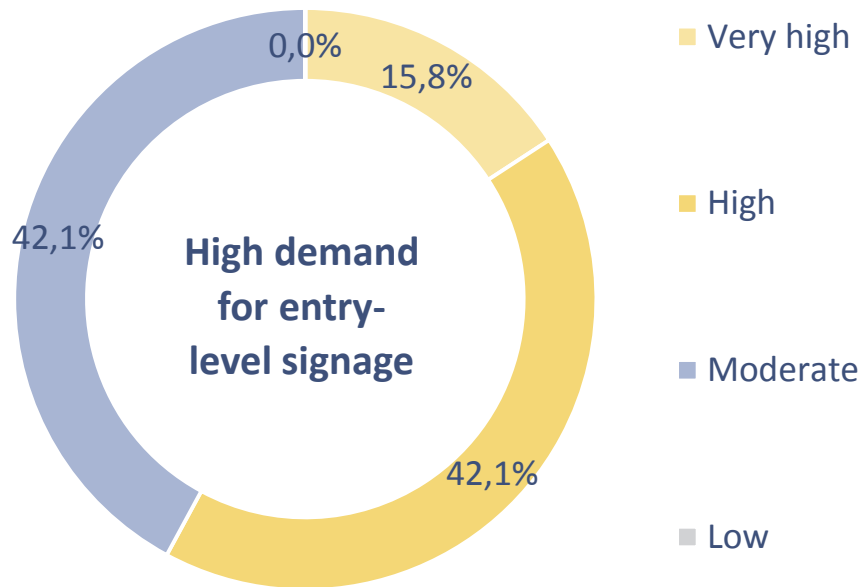


Fig. 3: DBCI Russia November/December 2014 "business expectations", n=22



Further Research | High demand for entry-level Digital Signage Solutions

**Demand for entry-level products in Digital Signage projects 2014**



***Question:** How much demand did your customers have for entry-level products (hardened consumer displays, cost effective media players, standard software, content shops & templates) within the last 12 months?*

Falling hardware prices and availability of plug-and-play solutions have resulted in a high demand for entry-level Digital Signage

Fig. 4: DBCI Russia November | December 2014  
"demand for entry level products 2014", n=19

 Further Research | DooH in Russia industry favours Adscreen (Рекламный экран)

**Question:** Which nomenclature do you prefer for Digital-out-of-Home?

57,9% of all polled companies are favoring the nomenclature Adscreen (Рекламный экран) for the media

31,6% of all polled companies are favoring the nomenclature Digital out of Home

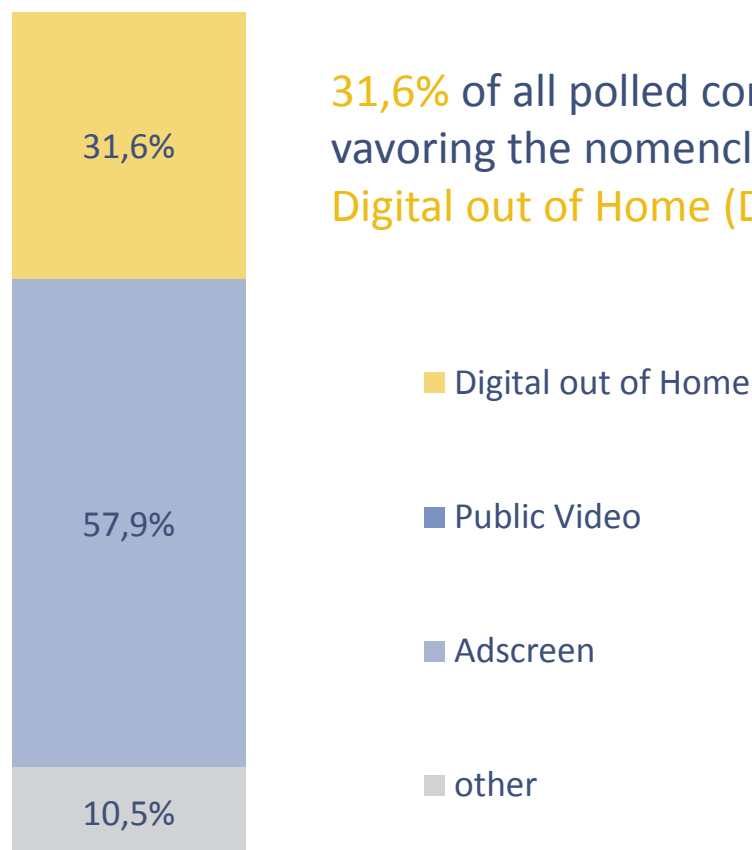


Fig. 5: DBCI Russia November | December 2014 "favoured nomenclatura DooH", n=19



## Roadmap 2015 & Contact

2015	
January	← Jan./Feb.   02. 02.
February	
March	← Mar./Apr.   23. 03.
April	
Mai	← May/Jun.   18. 05.
Jun	
July	← Jul./Aug.   20. 07.
August	
September	← Sept./Oct.   17. 09.
October	
November	← Nov./Dec.   26. 11.
December	

- The next survey will take place in calendar weeks 3-4 of 2015.
- The next planned publication date will be the 2<sup>nd</sup> February 2014.
- 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 2014. For further information please contact Daniel Russell.

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