

Russia

January | February 2015

**DBCI**



Digital Signage & Dooh  
Business Climate Index

The pulse of the Digital Signage  
and Dooh industry



**invidis**  
CONSULTING

invidis research  
2015 RU 100



## Digital Signage market faces difficult year 2015

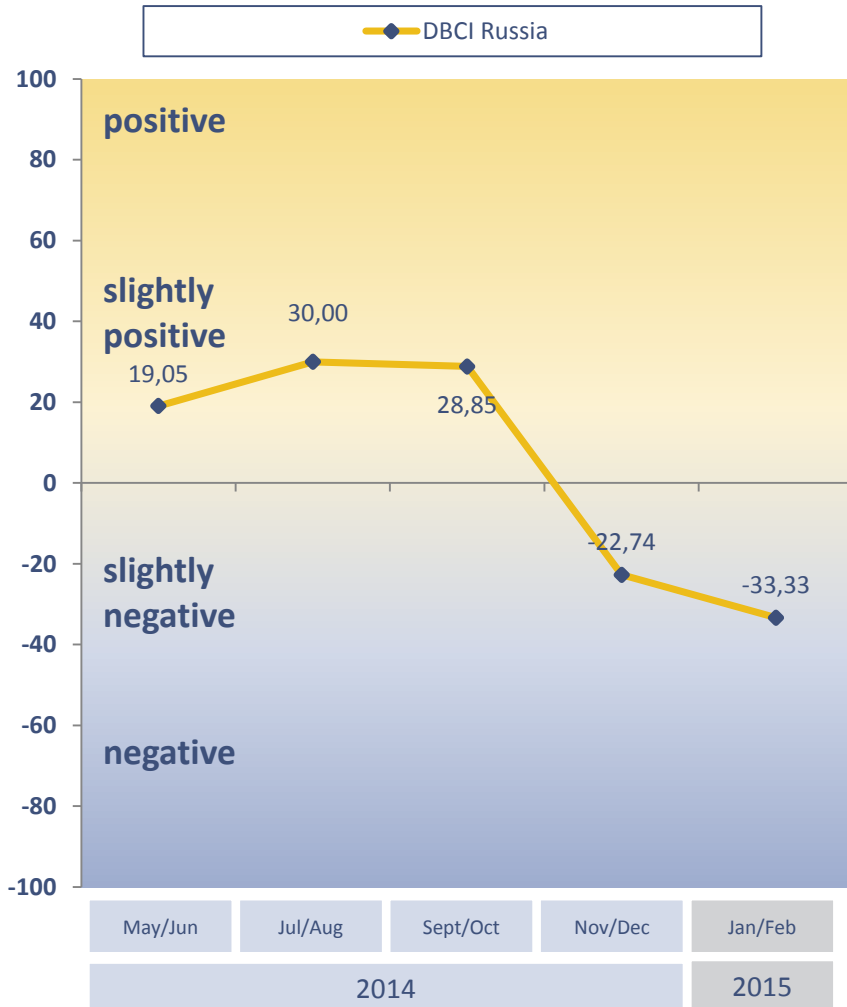


Fig. 1: DBCI Russia January | February 2015 „Index Russia“, n=21

- The digital Signage Business Climate Index Russia has been polled for the fifth time in Russia. Since the last survey in November, the index has dropped further from -22,75 by 10,59 base points to reach -33,33 base points
- Only little more than half of the market still sees the current business situation as satisfactory. While the outlook for the next six months has slightly recovered since the last survey
- After a good start in 2014, at least since the third quarter of the year, the volatile political situation and its economic consequences had a clear negative impact on the Digital Signage market in Russia
- Particularly 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 postponed
- The industry has also a negative outlook on the growth potential for 2015. Further planned investments will be put on hold and the competition for the remaining business will markedly intensify

### Further research:

- The Digital Signage industry created new jobs in 2014. 40% of all companies in the Digital Signage Market have hired new staff

#### Survey facts

- Participants: n=21
- Region: Russia
- Time frame: 2015 calendar weeks 4-5



## Many market participants with negative current business sentiment

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

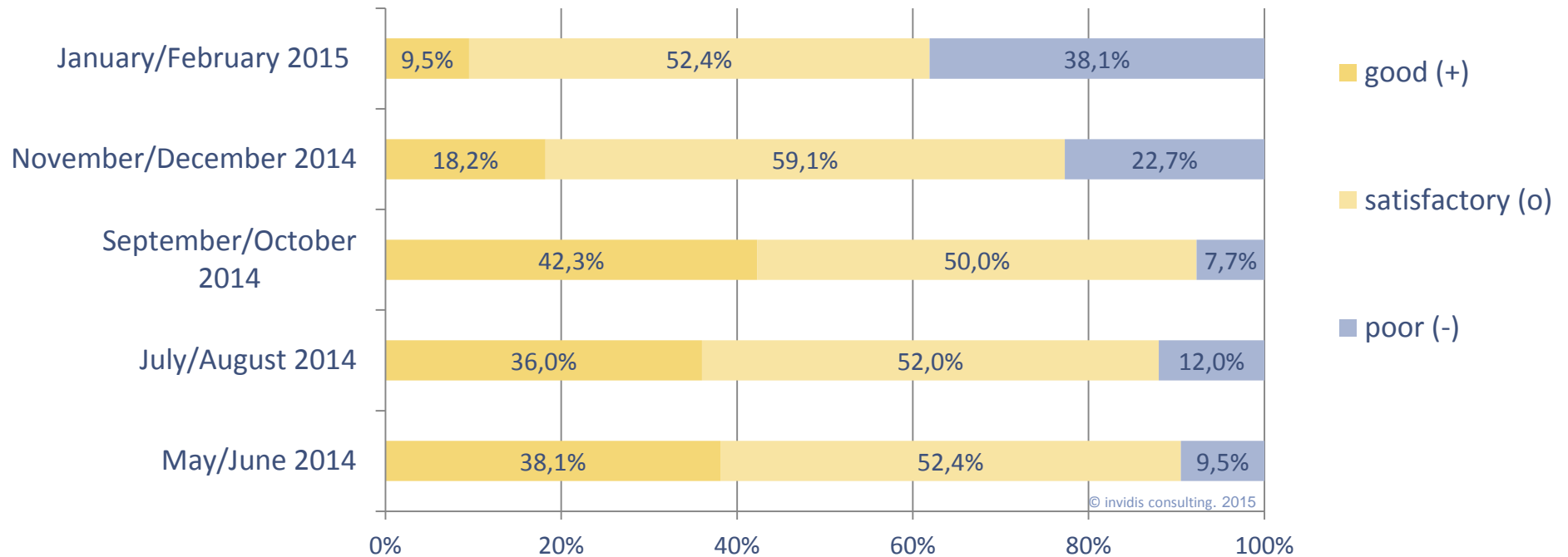


Fig. 2: DBCI Russia January | February 2015 "business situation", n=21



## Expectations for the year 2015 highly conservative

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

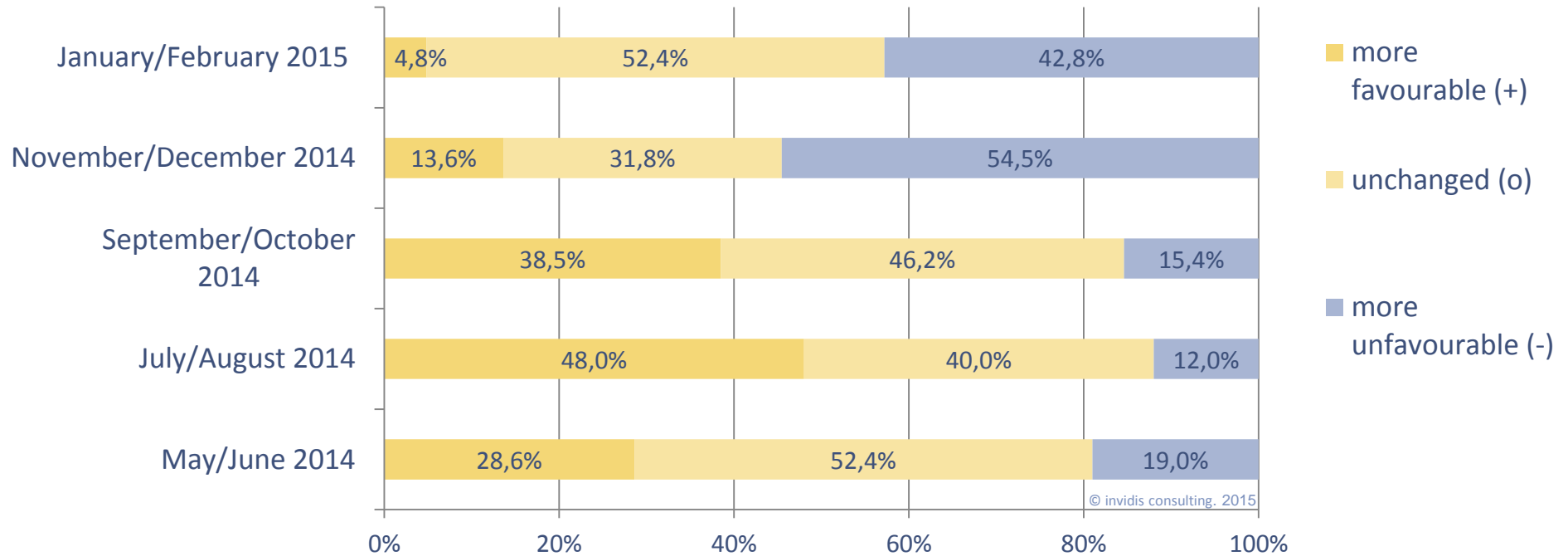


Fig. 3: DBCI Russia January | February 2015 "business expectations", n=21



# Hirings 2014 | Digital Signage industry created new jobs in 2014

- 40% of all companies in the Digital Signage Market have hired new staff in the last year
- In the year 2014 between 30 to 40 new jobs were created in the Digital Signage market in Russia
- The comparably low growth year 2014 in the Russian Digital Signage market and the difficult economic situation is also reflected in the number of new openings created
- The high customer demand and a growing number of projects in the first semester of 2014, led many companies to hired new employees. By the end of the year most of that projects were put on hold and job cuts will be eminent in the first two quarters of 2015

Company growth in new jobs created 2014

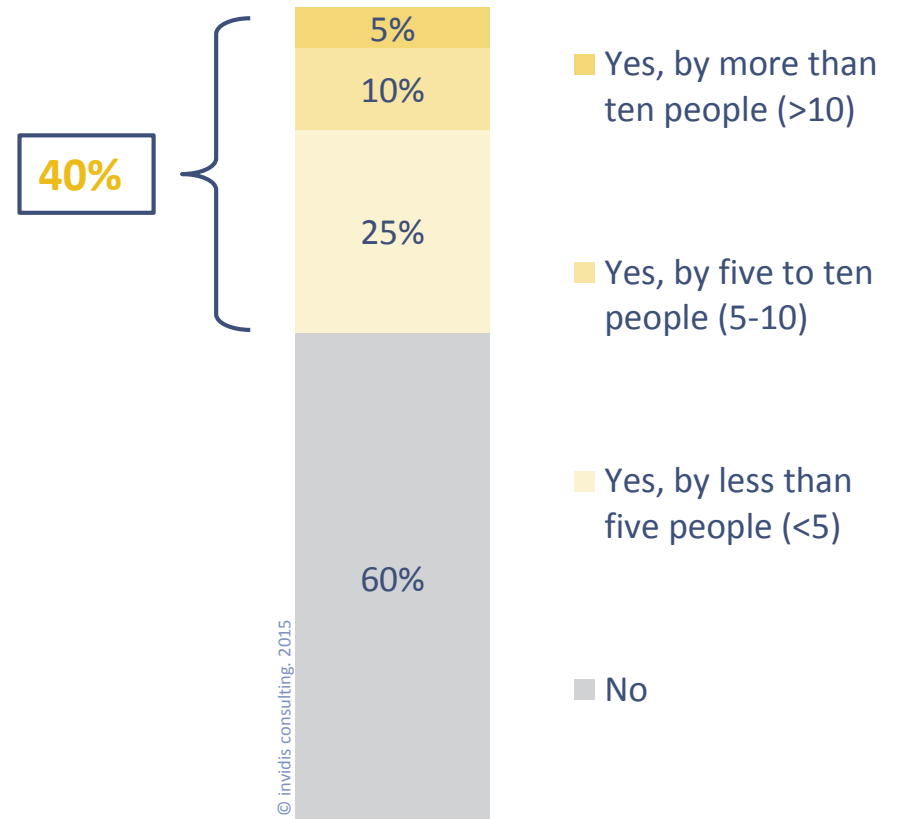


Fig. 4: DBCI Russia January/February 2015 "Hirings 2014", n=20



## Roadmap 2015 & Contact

2015	
January	
February	
March	← <b>Mar./Apr.   2015/04/09</b>
April	
May	← <b>May/Jun.   2015/06/03</b>
Jun	
July	← <b>Jul./Aug.   2015/08/05</b>
August	
September	← <b>Sept./Oct.   2015/10/05</b>
October	
November	← <b>Nov./Dec.   2015/12/02</b>
December	

- The next survey will take place in calendar weeks 11-12 of 2015.
- The next planned publication date will be the 9<sup>th</sup> April 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 2015. For further information please contact Daniel Russell.

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