

Russia
May | June 2015

DBCI



Digital Signage & Dooh
Business Climate Index

The pulse of the Digital Signage
and Dooh industry

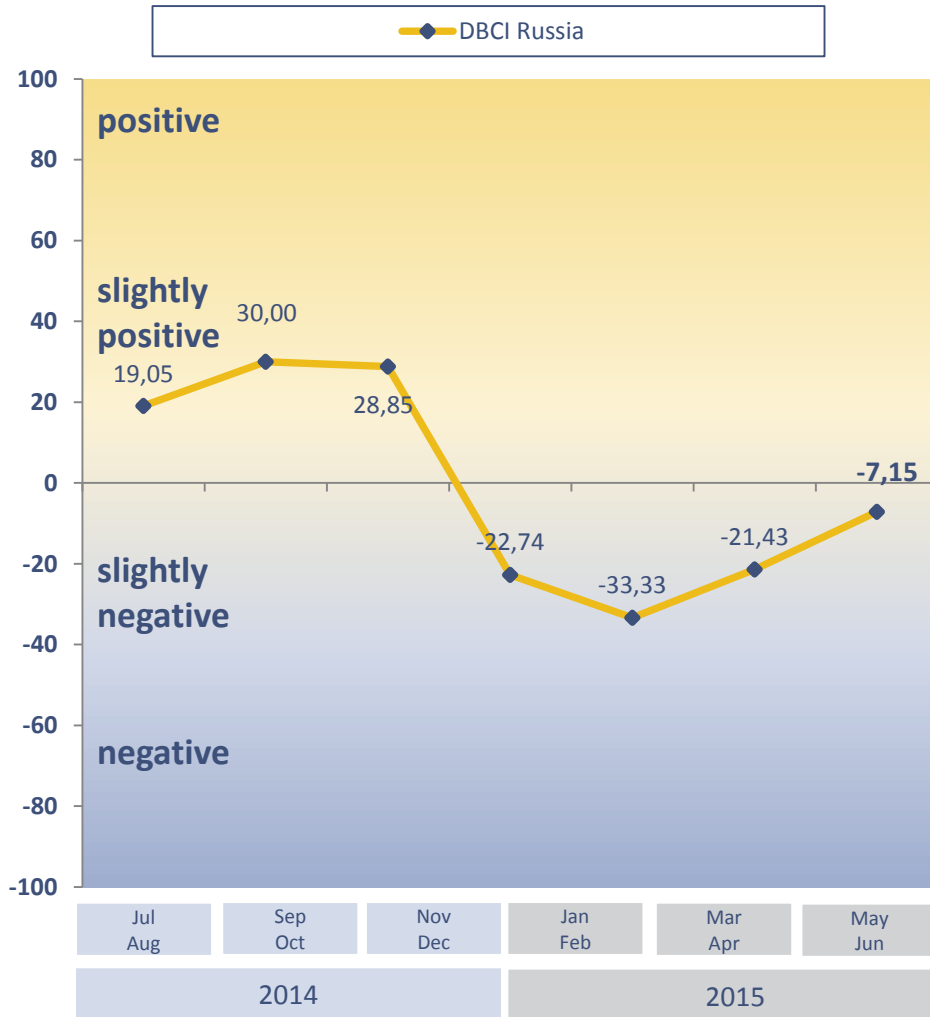


invidis
CONSULTING

invidis research
2015 RU 300



Digital Signage market with slow recovery in the second quarter of 2015



- The digital Signage Business Climate Index Russia has increased by 14,28 base points from -21,43 base points to -7,15 base points.
- The DBCI reflects the current slightly negative business sentiment of the Digital Signage industry in Russia
- Over 70% of the polled companies are satisfied or rate their current business climate with *good*. While only less than 30% see their situation as *negative*.
- With 36% particularly the answers for *more favourable* business conditions within the next six month have increased markedly. More companies than in the first quarter expect definitive new impulses in the market until the end of the year.

Further Research

- There are high hopes for the market potential for LED display technology in outdoor locations. The Digital Signage and Digital-out-of-Home companies polled in the DBCI all see a high to very high potential for LED display technology in competition to LCD displays within the next 24 months.

Participants: n=22; Region: RU; Survey Period: 2015 calendar weeks 19-20

 Digital Signage industry with clearly increased current business situation

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

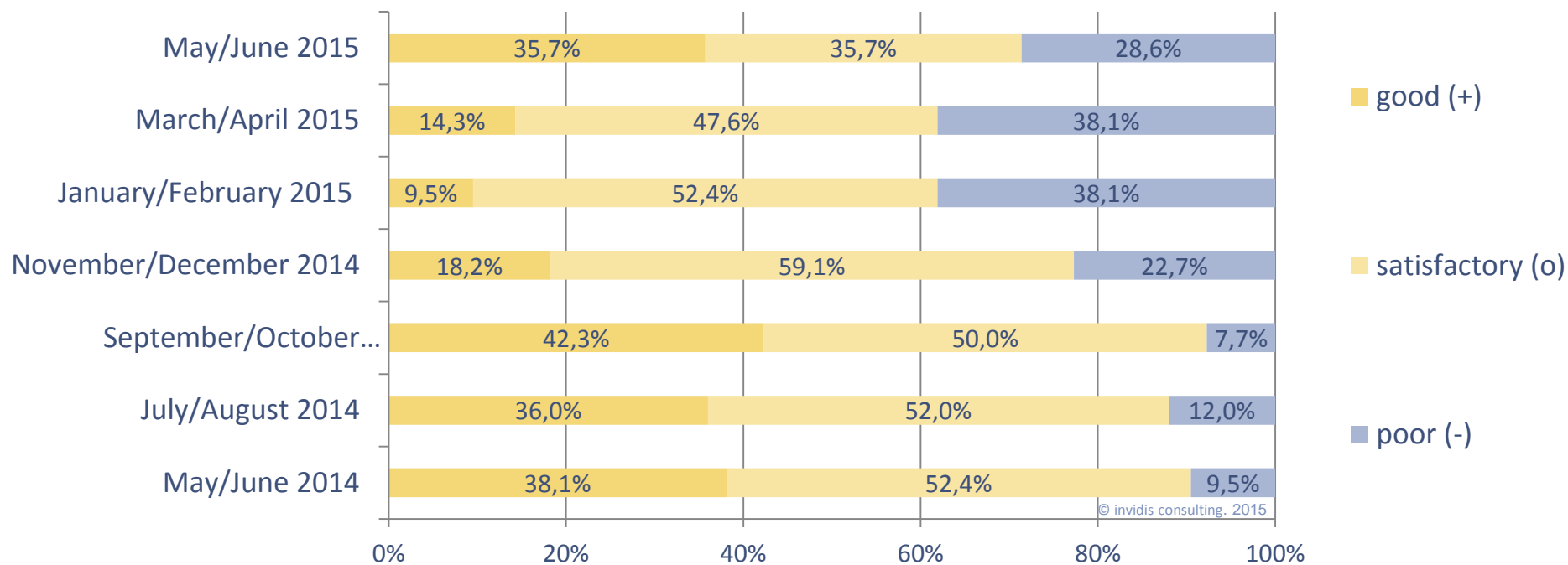


Fig. 2: DBCI Russia May | June 2015 "business situation", n=22



Market participants have improved outlook for the rest of 2015

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

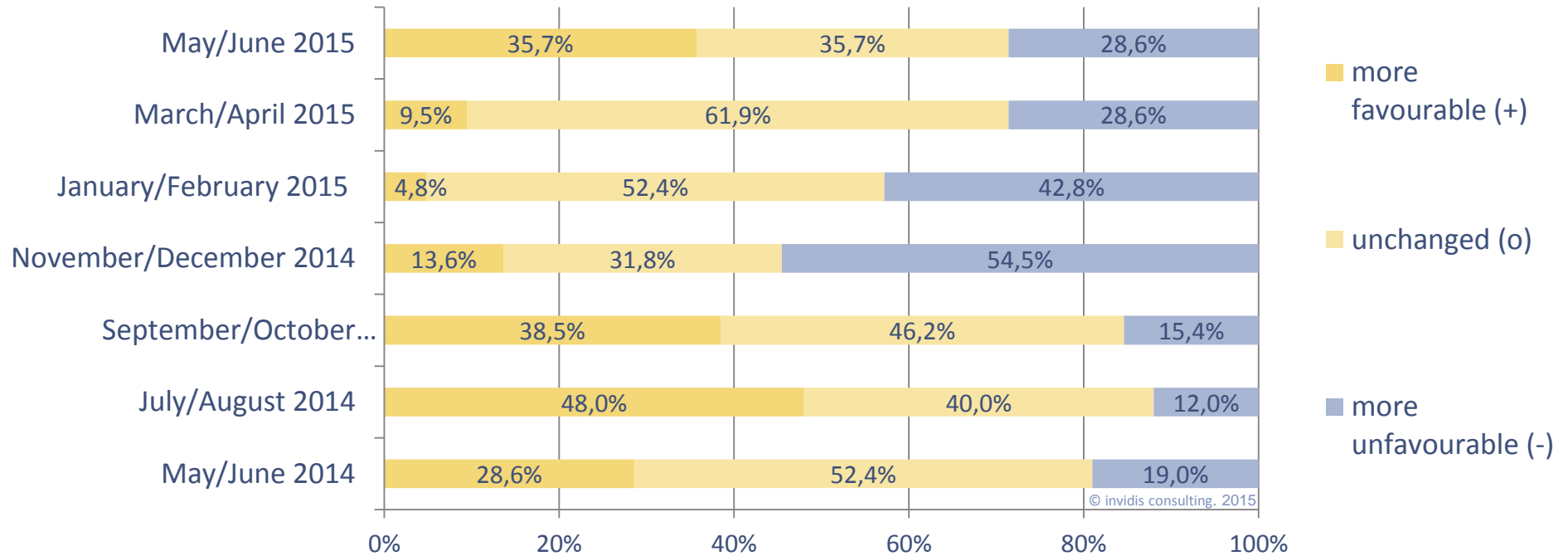


Fig. 3: DBCI Russia May | June 2015 "business expectations", n=22

 High hopes for market potential of LED display technology in outdoor locations

Question: LED display technology has developed positively over the last years. Improved quality, smaller pixel pitch and lower prices have increased the acceptance in the market. How high do you see the potential for LED display technology in competition to LCD display technology in the next 24 months?

- The Digital Signage and Digital-out-of-Home companies polled in the DBCI see a high to very high potential for LED display technology in competition to LCD displays within the next 24 months
- Over the last years, improvements in LED display technology have resulted in a lower pixel pitch. Together with a rapid increase in competition and hence falling prices the market potential of LED display technology will further increase in the next years. The big market players like Samsung and LG have noted this trend and duly seek a fast market entrance.
- Still the survey shows the highest potential is still attributed to outdoor installations. For indoor solutions the low viewing distance dictates a very low pixel pitch and hence high costs.

LED display technology outlook 2016

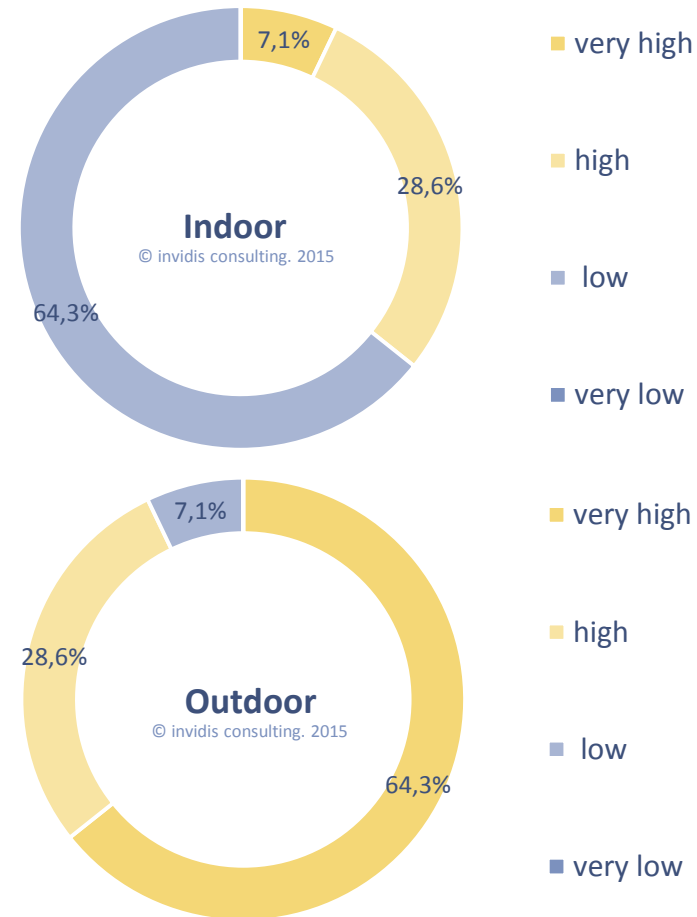


Fig. 4: DBCI Russia May | June 2015 "LED display technology outlook 2016", n=19



Roadmap 2015 & Contact

2015
January
February
March
April
May
Jun
July
August
September
October
November
December

← **Jul./Aug. | 2015/08/05**

← **Sept./Oct. | 2015/10/05**

← **Nov./Dec. | 2015/12/02**

- The next survey will take place in calendar weeks 28-29 of 2015.
- The next planned publication date will be the 5th July 2015
- 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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