

Russia

July | August 2015

DBCI

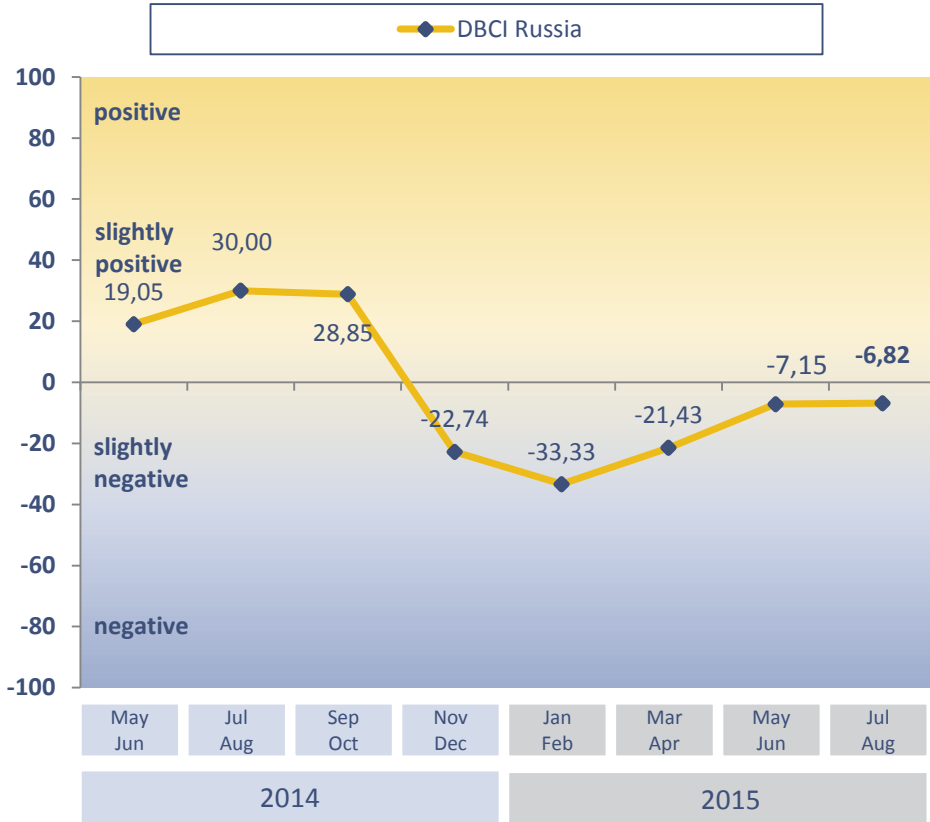
The pulse of the Digital Signage
and DooH industry

OVAB Digital Signage & DooH
Business Climate Index



invidis research
2015 RU 400

 Digital Signage business sentiment remains slightly negative in July and August



- The Digital Signage Business Climate Index (DBCI) in Russia has increased marginally since the last poll in May. The Index rose from -7,15 base points by 0,33 points to reach -6,82 base points.
- Like the current business situation and the outlook for the future is assessed more conservatively by the market participants compared to May
- As the political crisis has cooled off in the last few months, the economic situation in the Russian Federation remains volatile. The main problems are the low oil price, a high inflation combined with an devaluation of the local currency and the retreat of foreign investments.

Further research:

- Other than touch technology, interactive solutions are still not yet in high demand from the customer
- For QR/hashtag, iBeacon/NFC and Kinect most market participants expect only a average to low customer demand over the next 24 months

Participants: n=22; Region: RU; Survey Period: 2015 calendar weeks 28-29

Fig. 1: DBCI Russia July | August 2015 „Index Russia“, n=22



10.-11. September 2015
Digital Signage Summit Europe in Munich
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 Digital Signage industry with more conservative current business situation

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

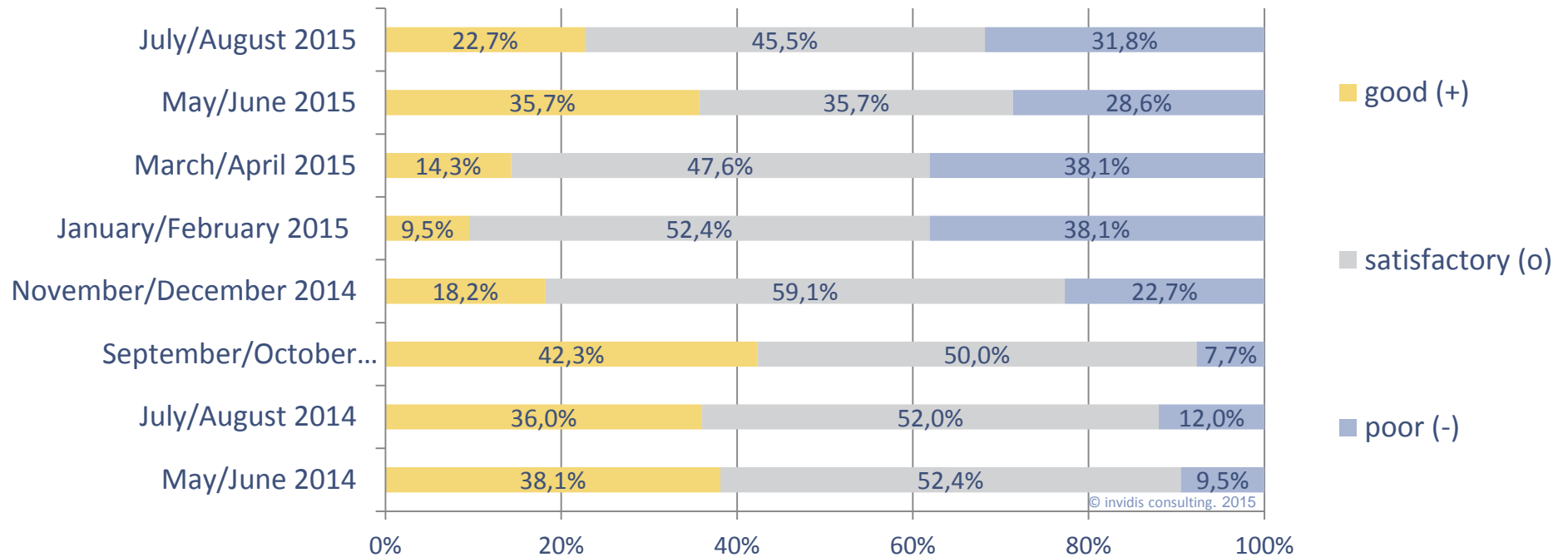


Fig. 2: DBCI Russia July | August 2015 "business situation", n=22



Market participants have robust outlook for the next six months

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

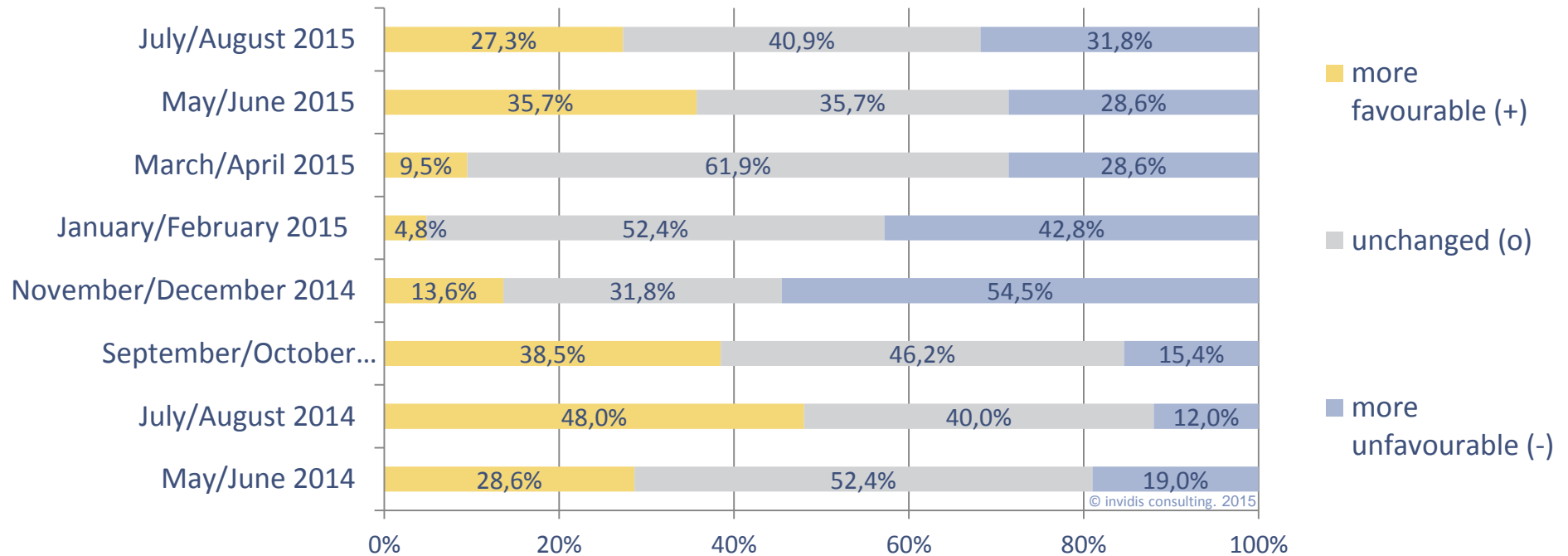


Fig. 3: DBCI Russia July | August 2015 "business expectations", n=22



Further research | High customer demand for touch solutions expected

Interactive solutions – customer demand outlook 2016/17

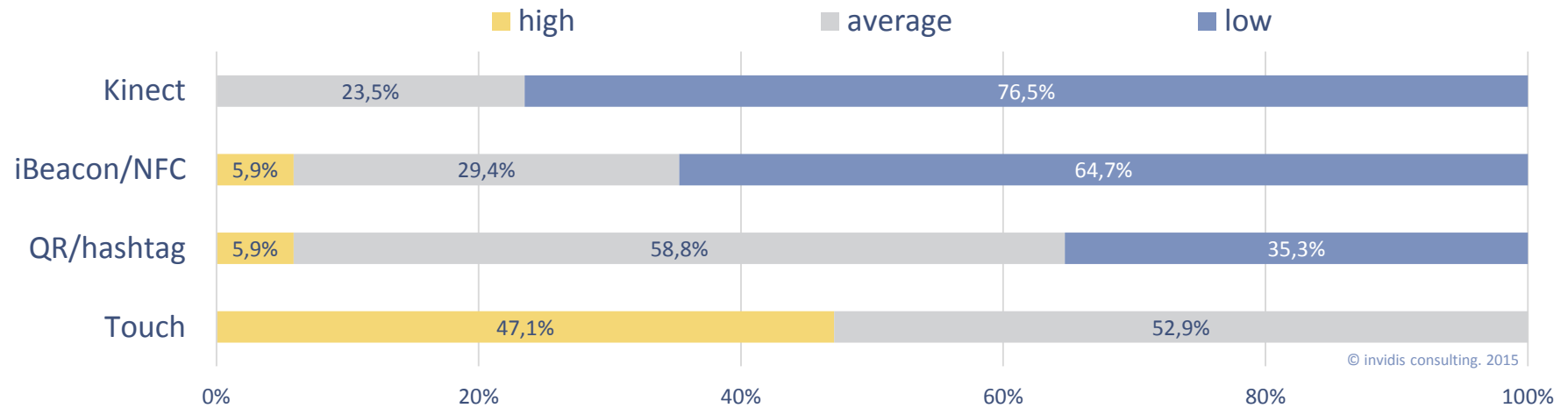


Fig. 4: DBCI Russia July | August 2015 “customer demand interactive solutions 2016/17”, n=17

Question: Interactive solutions for Digital Signage and Digital out of Home installations are becoming increasingly popular. How do you expect the customer demand for the following interactive solutions will become in the next 24 months?

- Interactive solutions for Digital Signage and Digital out of Home installations are becoming increasingly popular. In the Retail sector multi- and omni-channel concepts have taken up speed in the last two to three years.
- However, as the market participants expect only for touch solutions a significant customer demand within the next 24 months. While touch is already an established method of interaction and most users are familiar with the technology through use of mobile devices, other interactive solutions are less in demand.
- Whereas the Kinect technology is still not providing sufficient usability. iBeacon or NFC is yet to manage the challenging privacy issues. And finally analogue interactive options like QR or hashtag activation lacks seamless media communication



Roadmap 2015 & Contact

- The next survey will take place in calendar weeks 36-37 of 2015.
- The next planned publication date will be the 5th October 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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2015
January
February
March
April
May
Jun
July
August
September
October
November
December

Sept./Oct. | 2015/10/05

Nov./Dec. | 2015/12/02

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**Digital Signage Summit Europe in
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