

Russia

September | October 2015

DBCI



Digital Signage & DoOH
Business Climate Index

The pulse of the Digital Signage
and DoOH industry

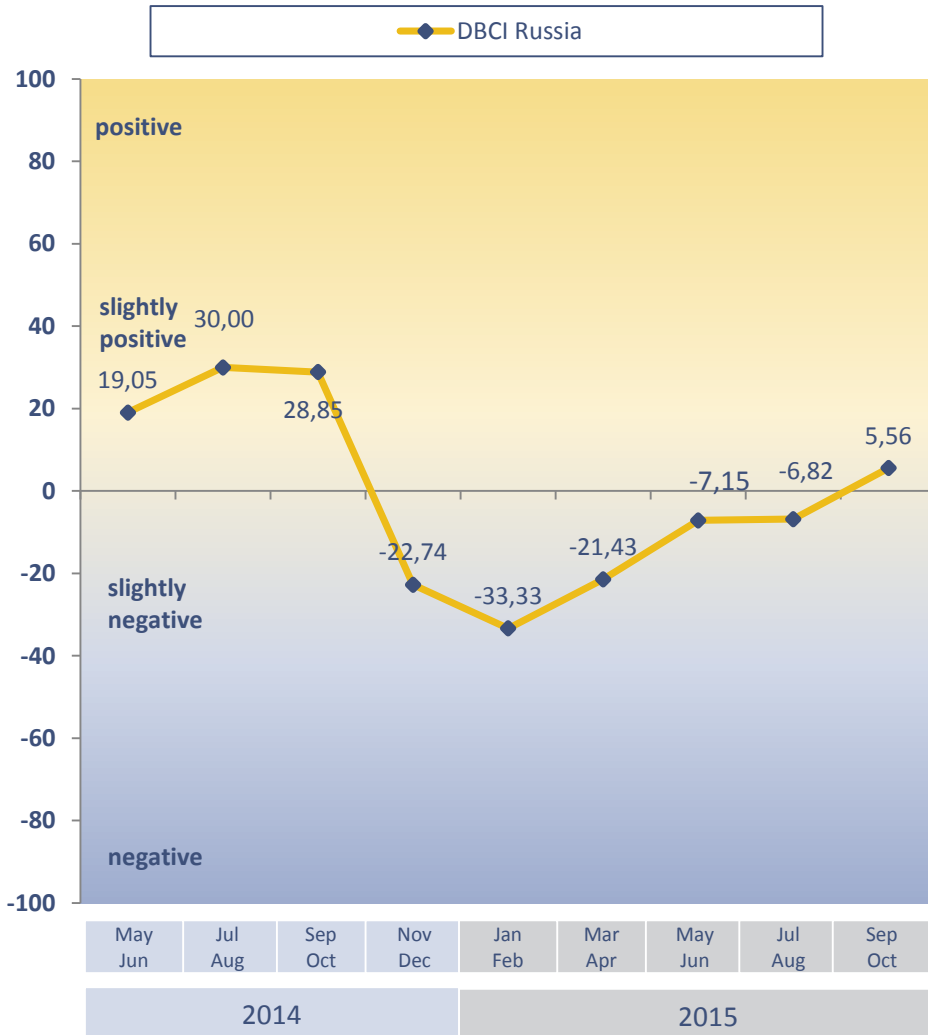


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CONSULTING

invidis research
2015 RU 500



Digital Signage business sentiment with a slight end-of-year recovery



- Since the last survey in July 2015 the Digital Signage Business Climate Index has increased by 12,37 base points from -6,82 base points to 5,56 base points.
- The current business situation has brighten up and increased by 5% reaching a 12 month high. The cautious situation at the start of the summer has changed, and the Russian IT industry is slowly managing to recover from the economical turmoil of the oil price decline and international sanctions on goods and investments
- The optimism towards the near future also saw growth. As 33% of all polled companies expect a *more favourable* situation for their business within the next six months.

Further Research

- 50% of the polled companies in Russia expect to have a growth in revenues in 2015 compared to 2014
- Still 37% of all polled companies had to accept a decline in revenues in the first six months of 2015.

Participants: n=18; Region: RU; Survey Period: 2015 calendar weeks 36-37



Digital Signage industry with increasingly positive current business situation

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

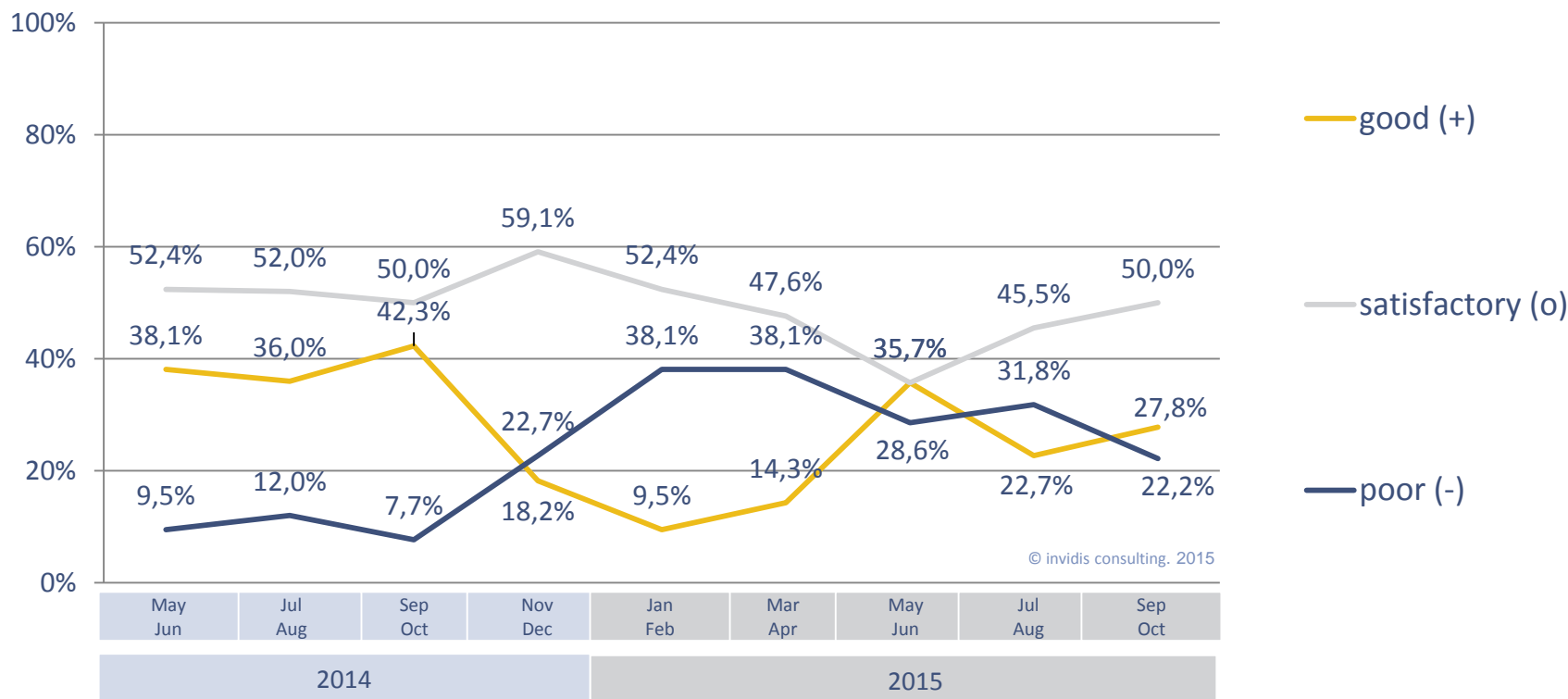


Fig. 2: DBCI Russia September | October 2015 "business situation", n=18

 Market participants have better outlook for the next six months

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

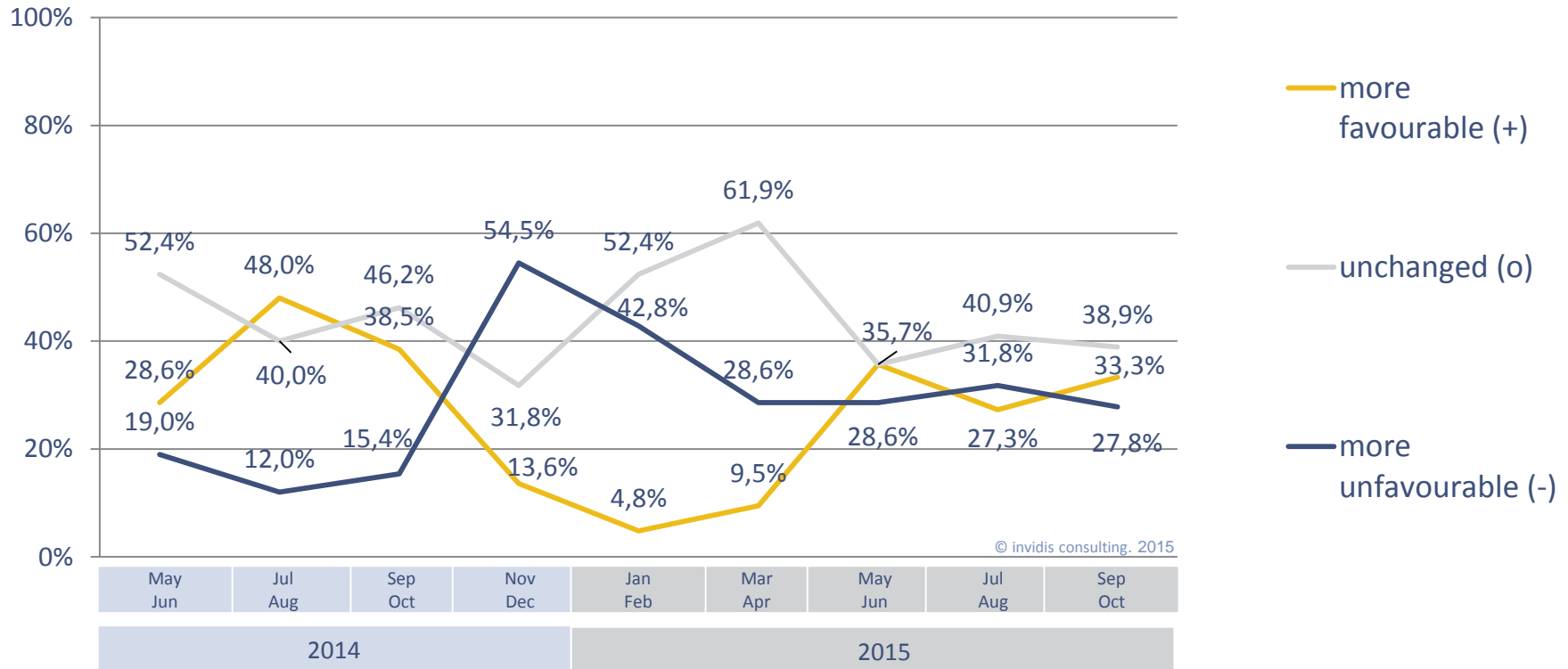


Fig. 3: DBCI Russia September | October 2015 "business expectations", n=18



Further research | First semester 2015 with higher revenues than 2014

“The revenues in the first half year 2015 have ... in comparison to the revenues of the same period in the previous year.”

50,1% of all polled companies could generate in parts a clear **increase in revenues** in the first half year term in 2015 compared to the same period in the previous year

Only 37,5% of all polled companies had to accept a **decrease in revenues** compared to the previous year

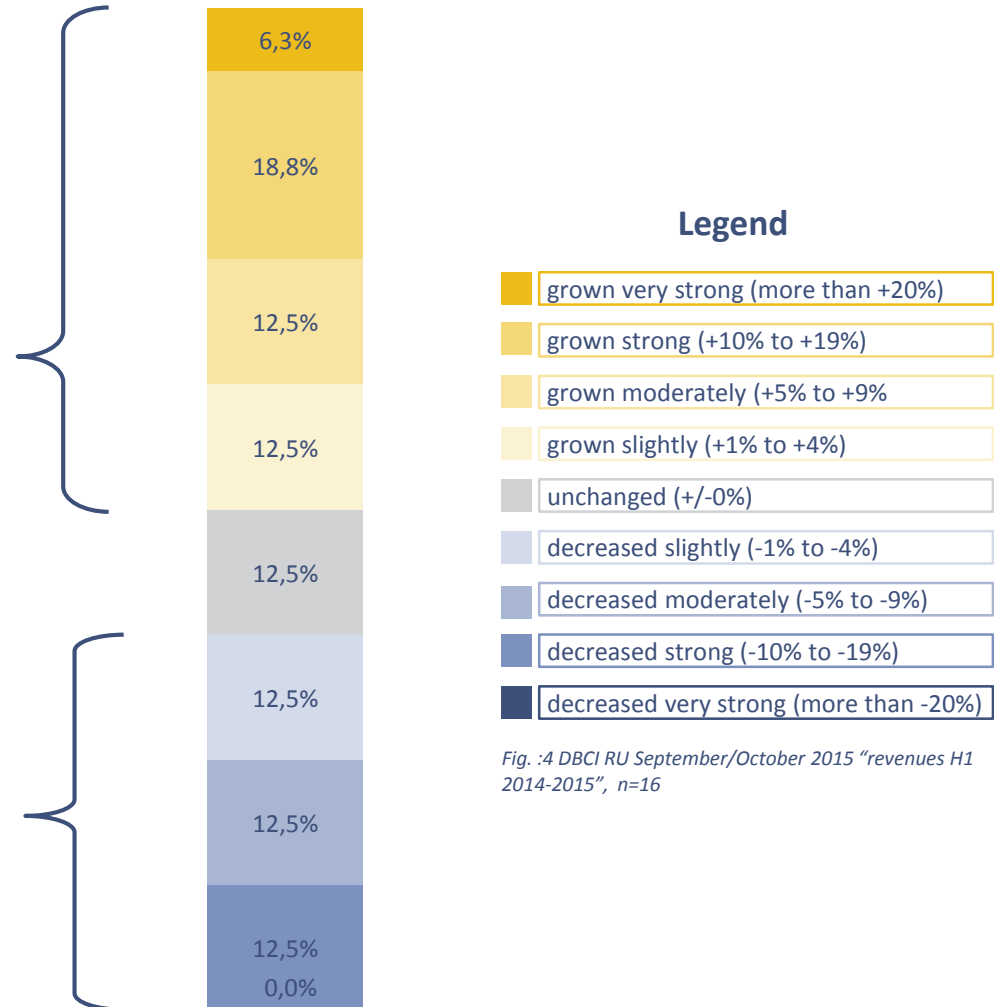


Fig. :4 DBCI RU September/October 2015 “revenues H1 2014-2015”, n=16



Further research | Increase in revenues expected for the full year 2015

“The revenues in 2015 will ... compared to the revenues in 2014.”

50,0% of all polled companies are expecting a healthy **growth** in **revenues** for the year 2015 compared with the previous year

Only 37,7% of all polled companies expect a **decrease** in **revenues** compared to the pervious year

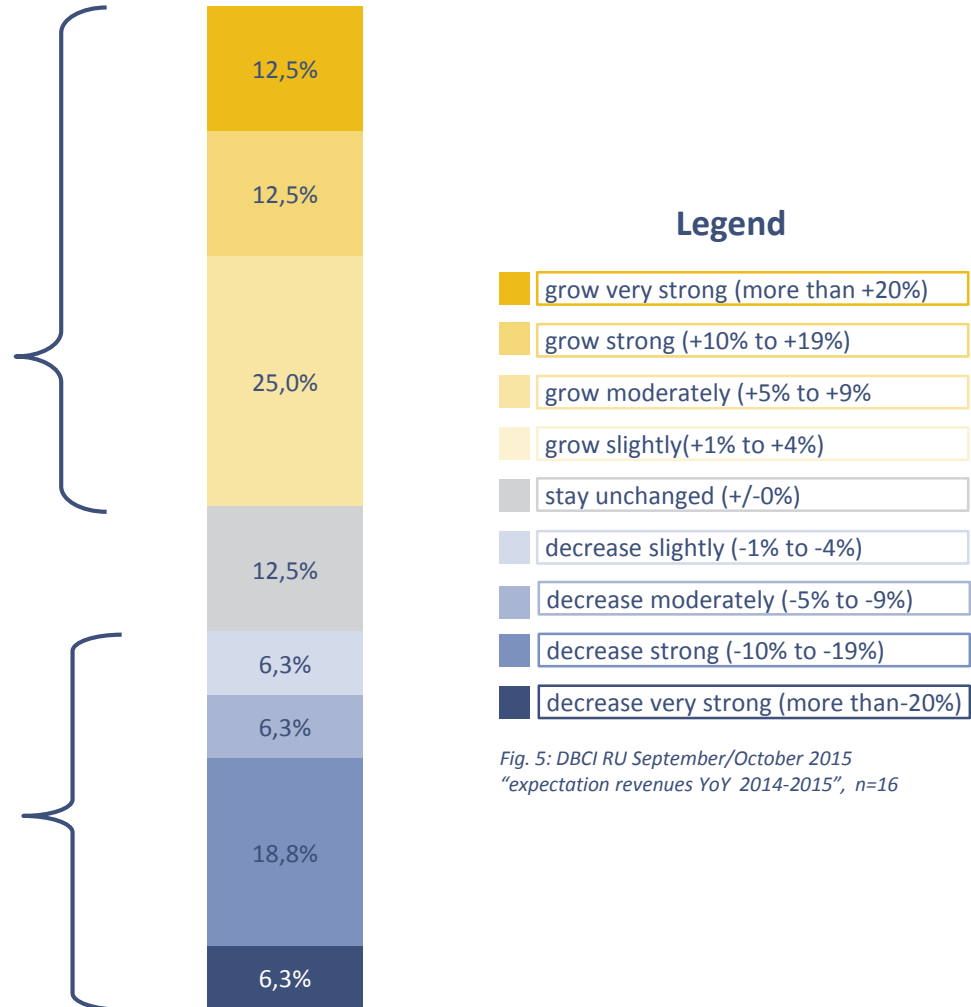


Fig. 5: DBCI RU September/October 2015
“expectation revenues YoY 2014-2015”, n=16



Roadmap 2015 & Contact

- The next survey will take place in calendar weeks 45-46 of 2015.
- The next planned publication date will be the 2nd December 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
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November
December

Nov./Dec. | 2015/12/02