

Russia

January | February 2016

DBCI



Digital Signage & DooH
Business Climate Index



**DIGITAL SIGNAGE
SUMMIT @ISE**

The pulse of the Digital Signage
and DooH industry



invidis
CONSULTING

invidis research
2016 RU 100

Business sentiment in Russia under pressure at the start of the new year

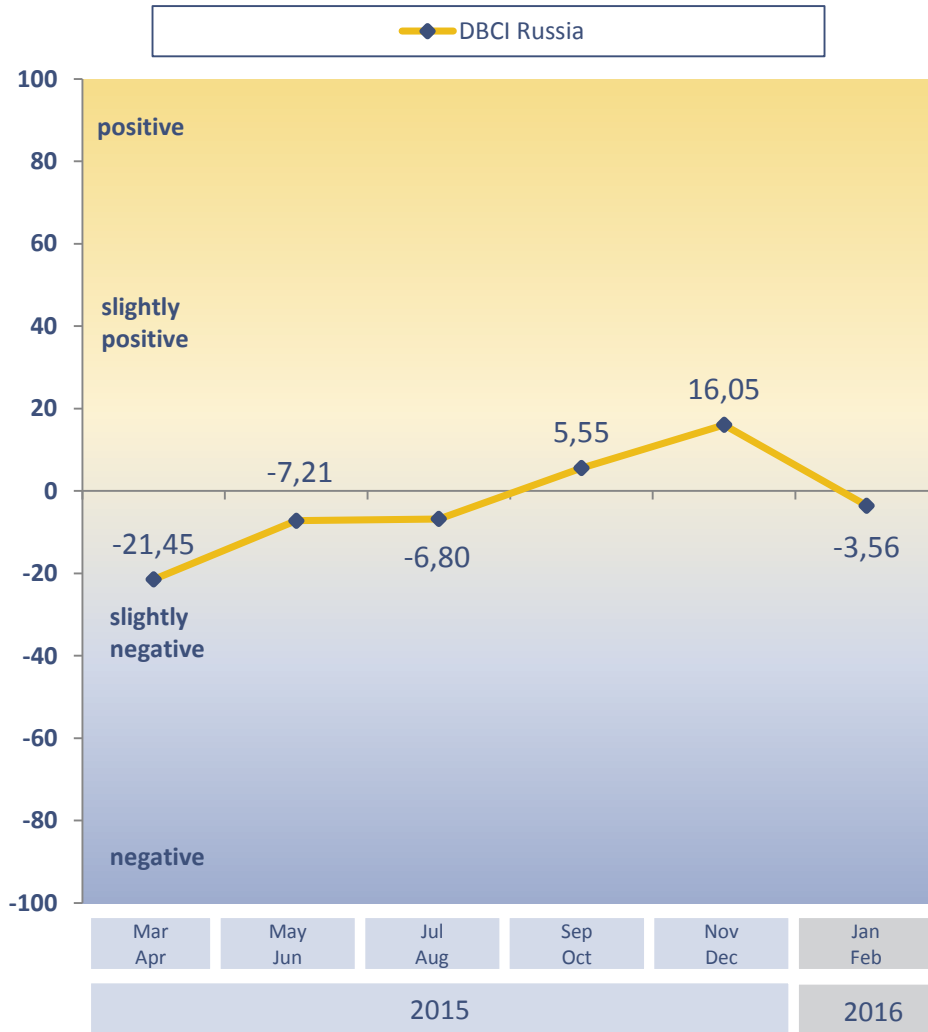


Fig. 1: DBCI Russia January | February 2016 „Index“ rolling 12 months, n=28

Participants: n=28; Region: RU; Survey Period: 2016 calendar weeks 2-3

- Since the last survey in November 2015 the Digital Signage Business Climate Index has lost its positive trend and decreased by 19,60 base points from 16,06 base points to -3,56 base points.
- The current business sentiment has declined only marginally, however the optimism towards the near future has deflated dramatically. Now almost 35% of all polled companies expect a *more unfavourable* situation for their business within the next six months.
- The general economy in Russia has to take on a wide range of problems in 2016. The primary ones being an continuously falling oil price and a low rubel exchange rate. The Digital Signage market participants are also effected by this development. Most components have to be bought in foreign currency, making the technology more expensive. This again puts strain on the budget of each project, even to the point of cancellation. Hence the number of projects declines (particularly in the smaller segment).
- On the bright side, the Football Worldcup 2018 is expected to defiantly push investments in digital projects.

change
DBCI 2016 #1

year-on-year

-89,3%

previous survey

-122,2%



Current business situation & outlook more conservative

Current business Situation | Russia | January/February 2016

Expectations | Russia | January/February 2016

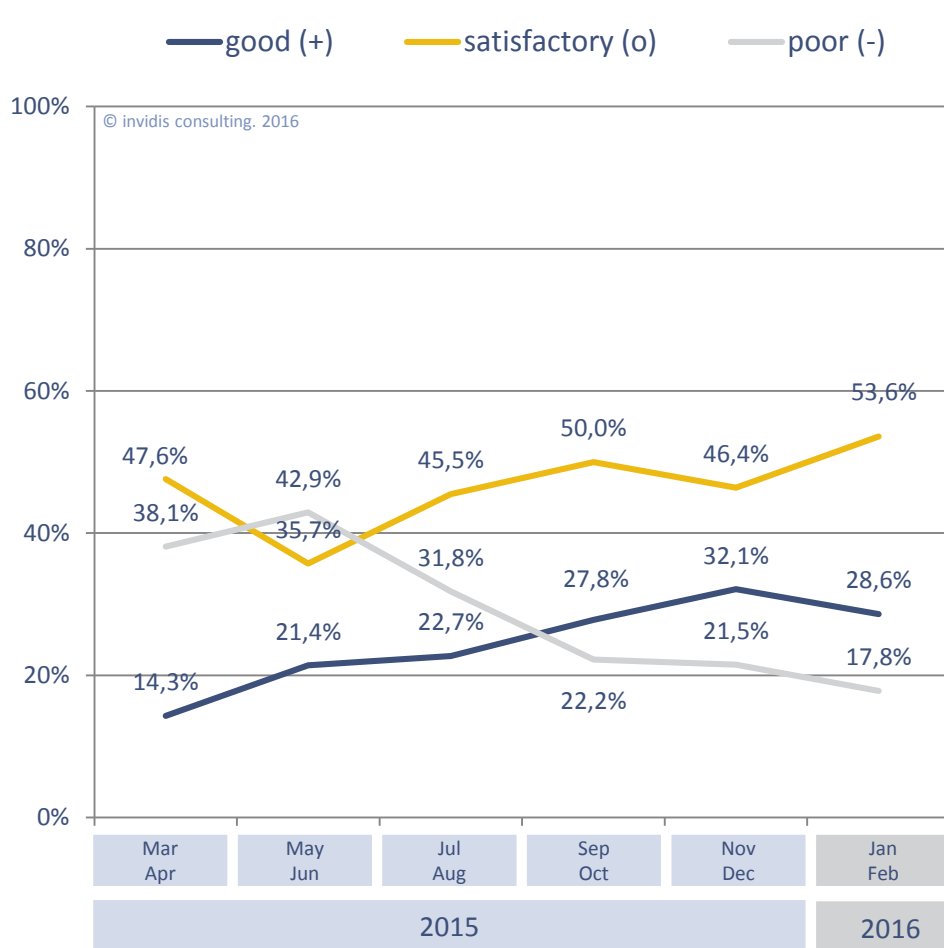


Fig. 2: DBCI Russia January | February 2016 „Business Situation“ rolling 12 months, n=28

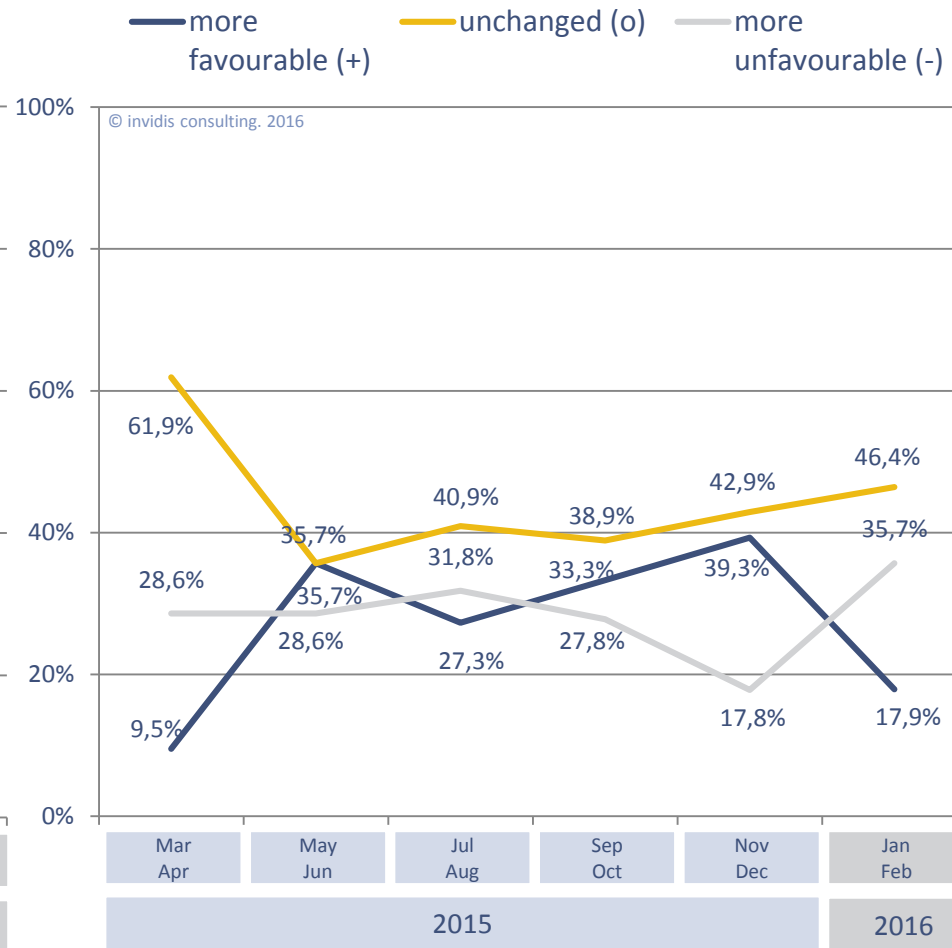


Fig. 3: DBCI Russia January | February 2016 „Expectations“ rolling 12 months, n=28



Hirings 2015 | Digital Signage creates many new jobs

- **44%** of all companies in the Digital Signage Market have hired new staff in the last year.
- In 2015 **up to 50 new jobs** were created in the Digital Signage market in Russia.
- In spite of the negative overall business situation in Russia, the Digital Signage industry managed to still grow enough to create new jobs. Now this unbroken positive trend in the IT industry overall has developed in a definite shortage of qualified personal. Companies are more and more concerned, how they can match recruiting with their growth strategy.
- As a whole there is a high demand for qualified personnel. Due to the digital transformation and the increasing integration of digital technologies the demand for personnel on a management level with new qualifications is very high (e.g. key account and project manager).
- The increasing expansion in vertical markets leads to a demand for more professionals from different industry branches by Digital Signage companies.

Company growth in new jobs created 2015

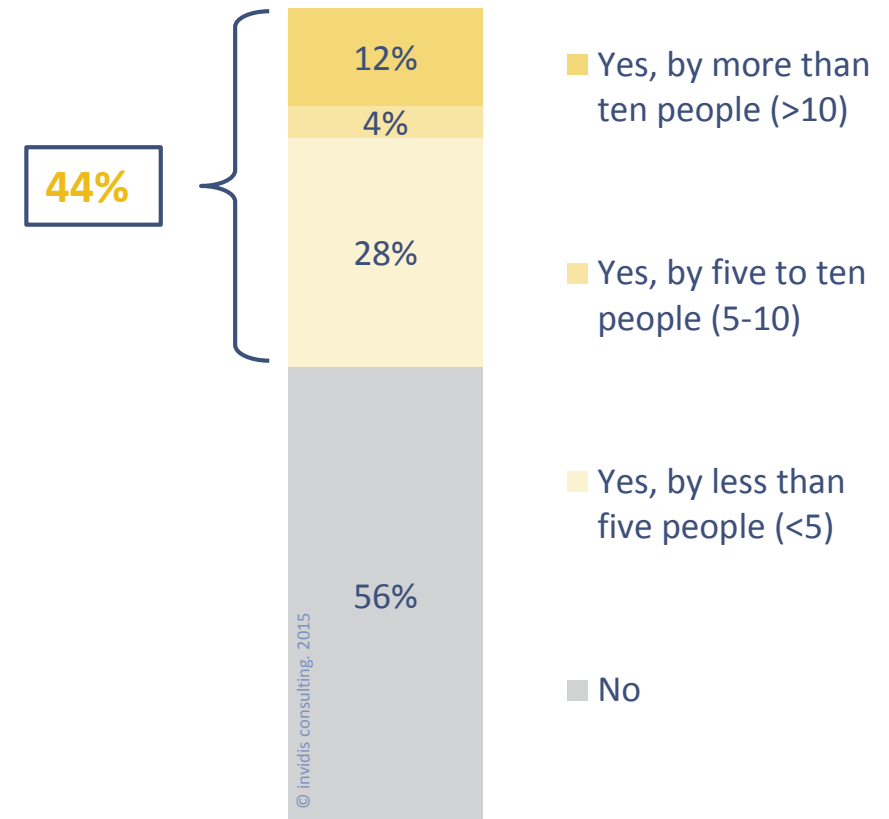


Fig. 4: DBCI Russia January/February 2016 "Hirings 2015", n=25



Roadmap 2016 & Contact

2016	
January	
February	
March	← DBCI Mar./Apr. WN13
April	
May	← DBCI May./Jun. WN21
June	
July	← DBCI Jul./Aug. WN30
August	
September	← DBCI Sep./Oct. WN39
October	
November	← DBCI Nov./Dec. WN48
December	

- The next survey will take place in calendar weeks 10-11
- The next planned publication date will in week 13
- 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 2016. For further information please contact Daniel Russell.

Contact:

Daniel Russell | Research Analyst
invidis consulting GmbH
Rosenheimer Str. 145e
DE-81671 Munich
Daniel.Russell@invidis.com
Phone: +49 89 2000416-21
Mobile: +49 151 62438503



DSS | The Digital Signage Summit series



**DIGITAL SIGNAGE
SUMMIT @ISE**

- «Digital Signage Summit» new brand for event series

- ❖ DSS Europe: 23-24 June 2016
- ❖ DSS MENA: 19-20 Sep 2016
- ❖ DSS Russia: 1-2 Nov 2016



**DIGITAL SIGNAGE
SUMMIT EUROPE**

- DSS is a dedicated confex event platform - conference and exhibition - featuring digital signage and DooH topics



**DIGITAL SIGNAGE
SUMMIT RUSSIA**

- Each event features visionary and best practise presentations as well as panel discussions concerning the most recent state of the art projects, trends and drivers of the industry



**DIGITAL SIGNAGE
SUMMIT MENA**

- All events also have a dedicated exhibition space for product presentation and networking opportunities



DSS | Digital Signage Summit Kick-off Sessions @ ISE 2016



- Together with the ISE and in cooperation with Digital Signage Summit Europe, invidis consulting will be present at [Integrated Systems Europe](http://Integrated Systems Europe 2016) 2016 (9 – 12 February 2016, Amsterdam) with several digital signage events.
- **ISE 2016 Presentations invidis consulting**
Every Day at 12:00, Commercial Theatre Hall 8
- **Digital Signage Summit Market Briefings**
Every Day at 14:00, Room F102
- **Digital Signage Summit Guided Tours**
Every Day at 14:30, Room F102
- **More here:**
invidis.de/ise-2016-digital-signage-ise-program/