Russia

May | June 2016

DBCI

Digital Signage & DooH Business Climate Index

DIGITAL SIGNAGE FEDERATION

DIGITAL SIGNAGE SUMMIT EUROPE
23-24 June 2016, Munich, Germany

The pulse of the Digital Signage and DooH industry

inviDiS CONSULTING

invidis research
2016 RU 300

Business sentiment in Russia continuing it's recovery in May
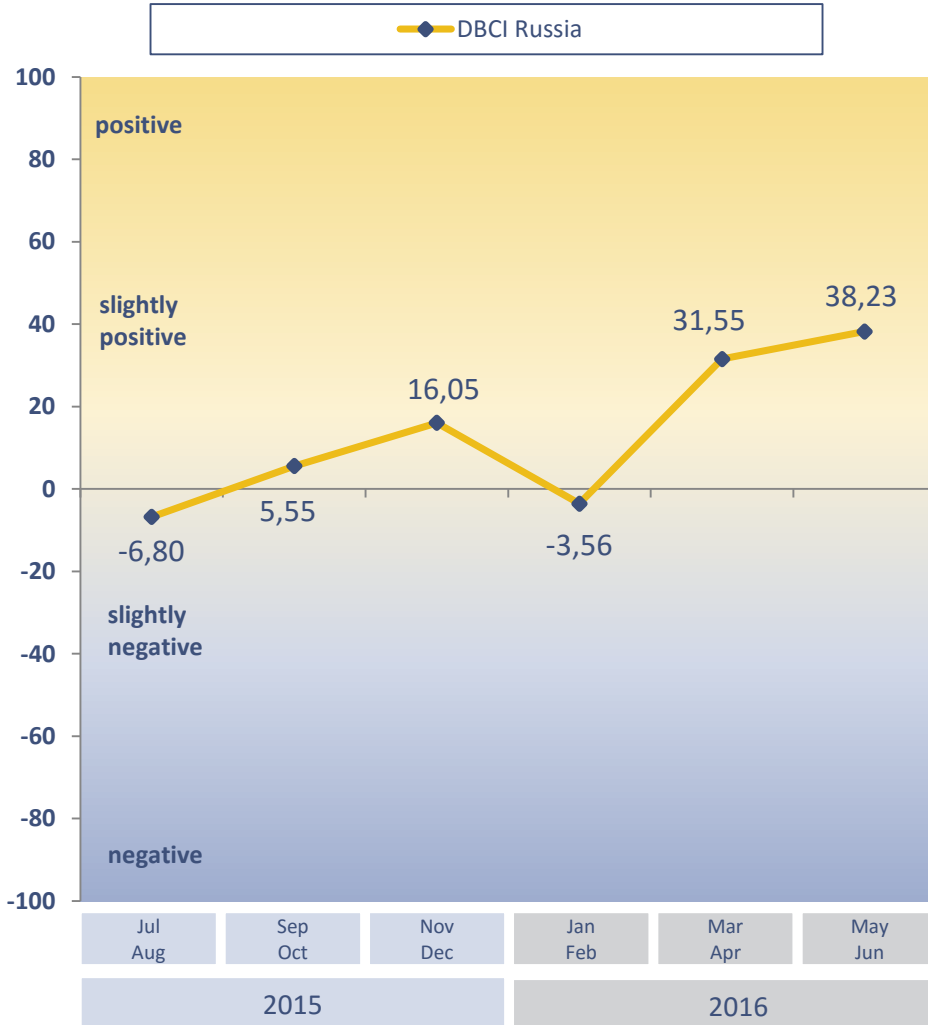

Fig. 1: DBCI Russia May | June 2016 „Index" rolling 12 months, n=17

- Since the last survey in March 2016 the Digital Signage Business Climate Index has further followed its positive trend and increased by 6,68 base points from 31,55 base points to 38,23 base points.

- As the current business situation is not rated as positive as in March, at the same time expectations for the near future have increased dramatically to an optimistic outlook. Now more than two thirds of all polled companies expect a *more unfavourable* situation for their business within the next six months.

- The business sentiment in May has steadied the drastic change from a slightly negative to a good business sentiment since the turn of the year. In general the Russian IT market seems to have left the lowest point of the economic slowdown behind. This was reflected in a general sales increase in the LFD market and in new digital signage project developments.

- Most Digital Signage solutions have been reliant on Windows as OS in 2015. However Linux based solutions are increasingly implemented

Participants: n=17; Region: RU; Survey Period: 2016 calendar weeks 20-21

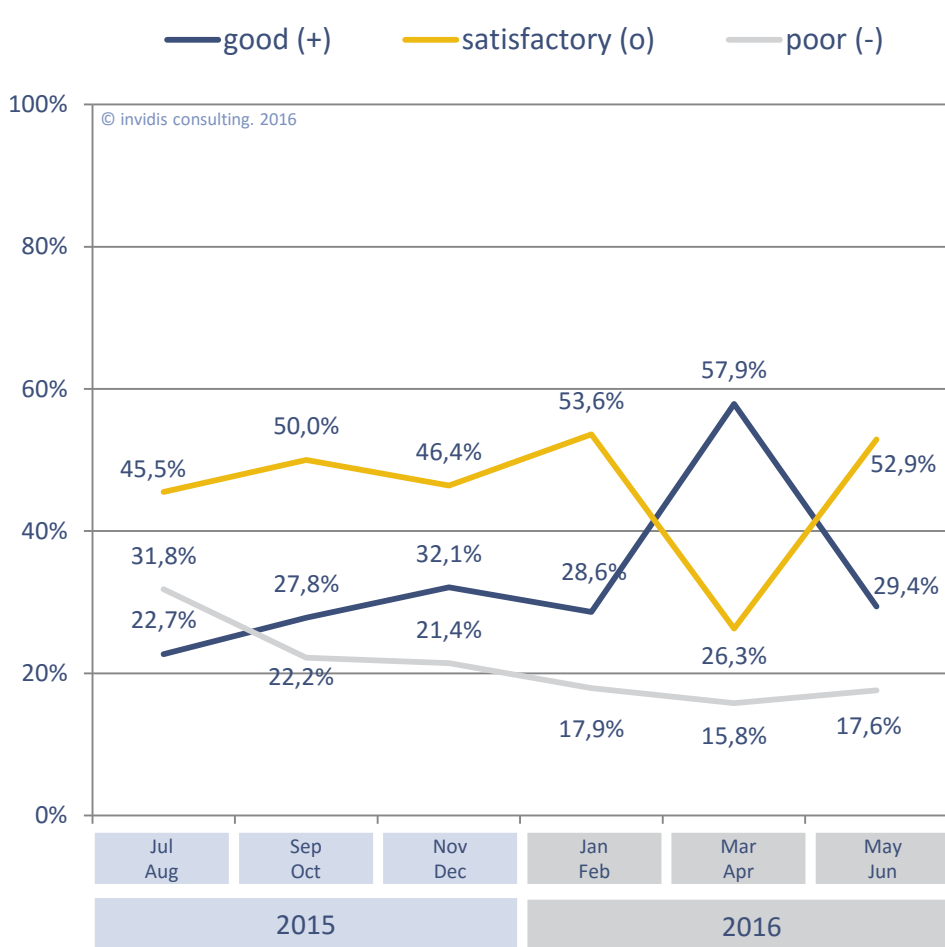# Satisfied current business situation & outlook markedly increased

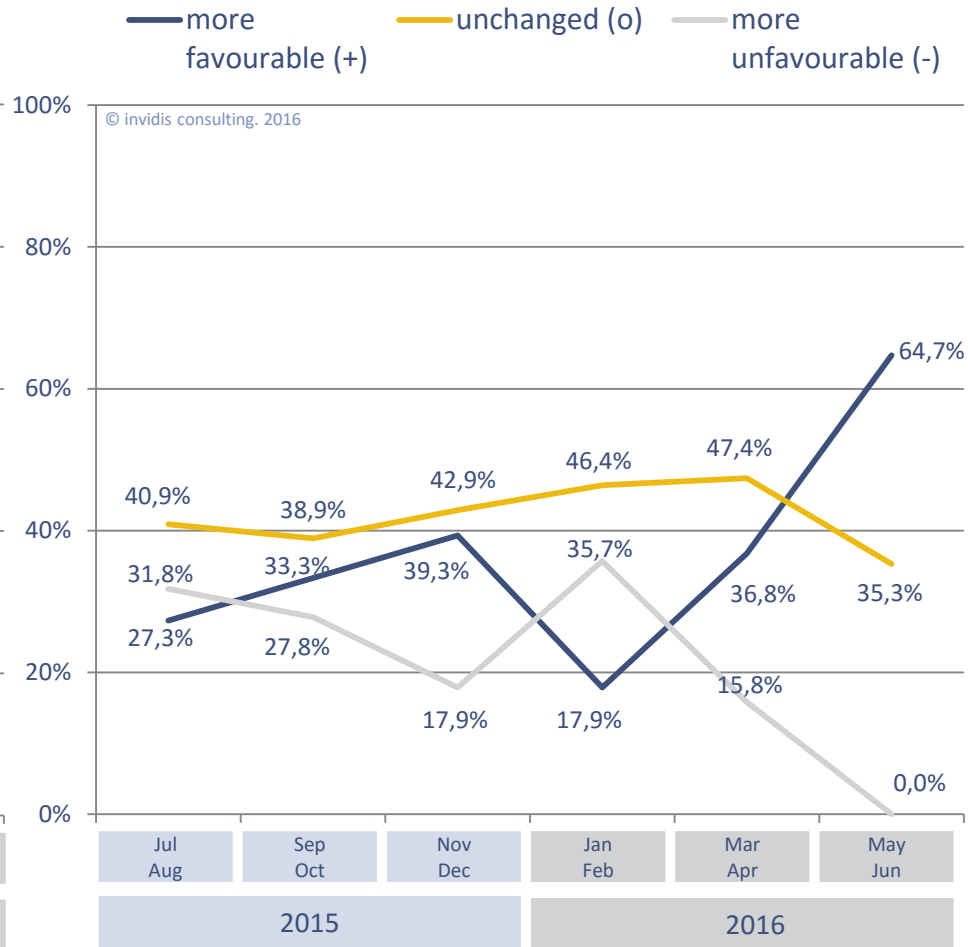*Fig. 2: DBCI Russia May | June 2016 „Business Situation" rolling 12 months, n=17*

Fig. 3: DBCI Russia May | June 2016 „Expectations" rolling 12 months, n=17

Windows in first, Linux challenges & Android picks up speed

Question: How high was the percentage of operating systems used in Digital Signage Projects in 2015?

Windows is implemented most frequently with Digital Signage projects. However other operating systems have significantly gained ground in the last two years.

Particularly Linux based installations are becoming more and more popular. Here cost and security issues are dictating the decisions. With Digital Signage installations becoming more varied in size and required performance, the appliances running on a non-PC architecture like Raspberry Pi, Cisco, BrightSign, Spinetix etc. are more widely integrated.

Cost effective systems operating on Android or SoC basis currently have the highest dynamic in the market. Still many security and performance issues remain.

Apple operating systems could establish a robust nice segment. However, many managers with IT responsibility dismiss it as an operating system for Digital Signage installations.

Market share of IT operating systems in Digital Signage installations 2015

Request dynamic

Android 5,9%

Embedded Linux 29,5%

DS Embedded Appliances 1,0%

Apple 4,5%

Linux 7,3%

Windows 51,8%

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Market penetration

- Windows auf x86 Platform
- Linux
- Apple (MacOS, iOS)
- Android
- Embedded Linux (Appliances
- Digital Signage Embedded Appliances
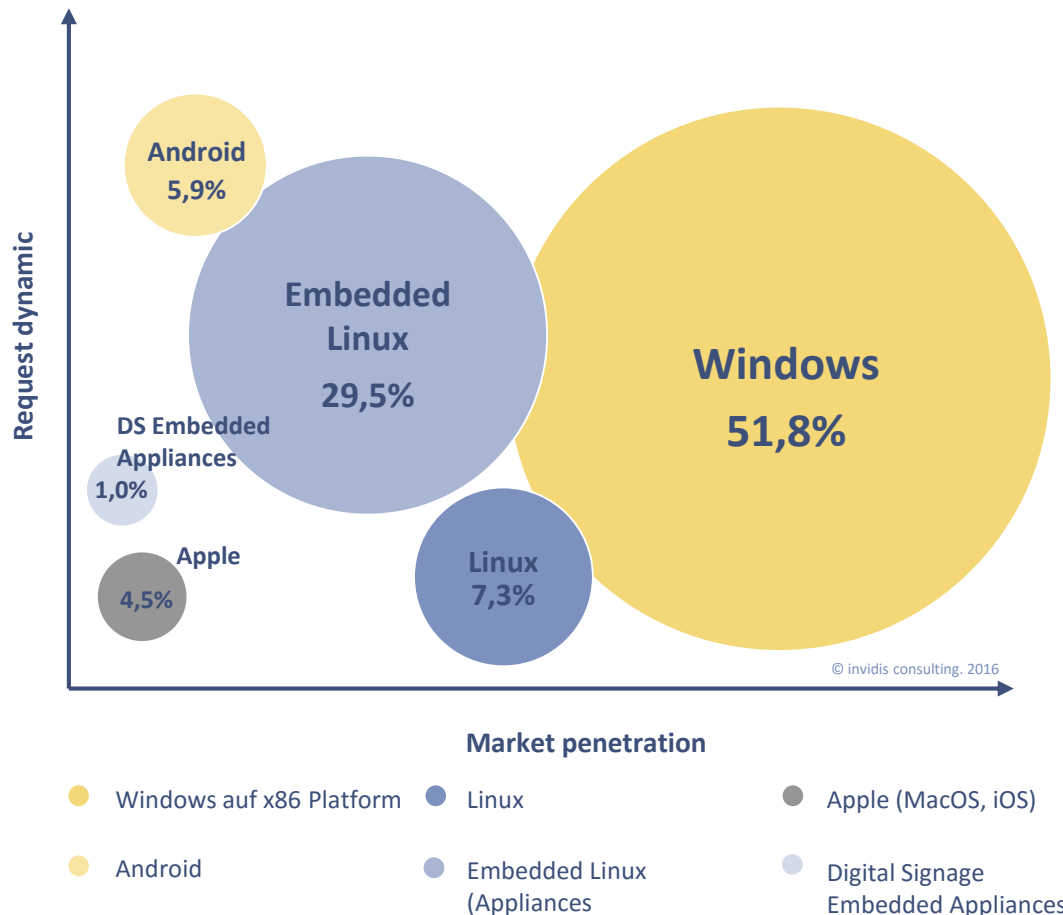
Fig. 4: DBCI Russia May | June 2016 "operating systems 2015", n=11

Roadmap 2016 & Contact

2016
March
April
March
April
May
June
July
August
September
October
November
December

◁ DBCI Jul./Aug. | WN30

◁ DBCI Sep./Oct. | WN39

◁ DBCI Nov./Dec. | WN48

OVAB Europe will be rebranded as **Digital Signage Federation Europe** starting with the 1st April 2016

- The next survey will take place in calendar weeks 28-29

- The next planned publication date will in week 30

- The DBCI is polled by invidis consulting and published in cooperation with DSF 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.

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DSS | The Digital Signage Summit series

- «Digital Signage Summit» new brand for event series
- DSS is a dedicated confex event platform - conference and exhibition - featuring digital signage and DooH topics
- 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
- All events also have a dedicated exhibition space for product presentation and networking opportunities

| ISE Amsterdam 9-12 Feb | INFOCOMM Las Vegas 7 Jun | EUROPE Munich 23-24 Jun | MENA Dubai 19-20 Sep | RUSSIA Moscow 1-2 Nov | N.Y.C. New York 10 Dec |