

Russia

July | August 2016

DBCI

The pulse of the Digital Signage and DooH industry



Digital Signage & DooH
Business Climate Index



**DIGITAL
SIGNAGE
SUMMIT**



invidis research
2016 RU 400

 Business sentiment in Russia stabilising on a positive level in the summer



- Since the last survey in May the Digital Signage Business Climate Index in Russia has remained almost flat with only a small nominal decrease by 0,03 base points from 38,23 base points to 38,20 base points. In total the Index is down by 16,5% year-on-year and up by 2,2% compared to the previous survey.
- The conservative assessment of the current business situation for products and services in the Digital Signage and Digital-out-of-Home industry has declined and positive view dominates the index Together with a decline of the negative assessment it is responsible for the overall stable trend of the index.
- However, the expectations for the near future have declined as more market participants are expecting a negative development of the business sentiment within six months.

Further Research

- Over 53% of the polled companies in Russia have growing revenues in the first semester of 2016. Still 23% of the market participants had to accept a decline in revenues in the first two quarters. However, all of those companies are expecting to balance the losses at the end of the year.

Participants: n=17; Region: RU; Survey Period: 2016 calendar weeks 29-30

Fig. 1: DBCI Russia July | August 2016 „Index“ rolling 12 months, n=17



Good current business situation & robust six month outlook

Current business Situation | Russia | July/August 2016

Expectations | Russia | July/August 2016

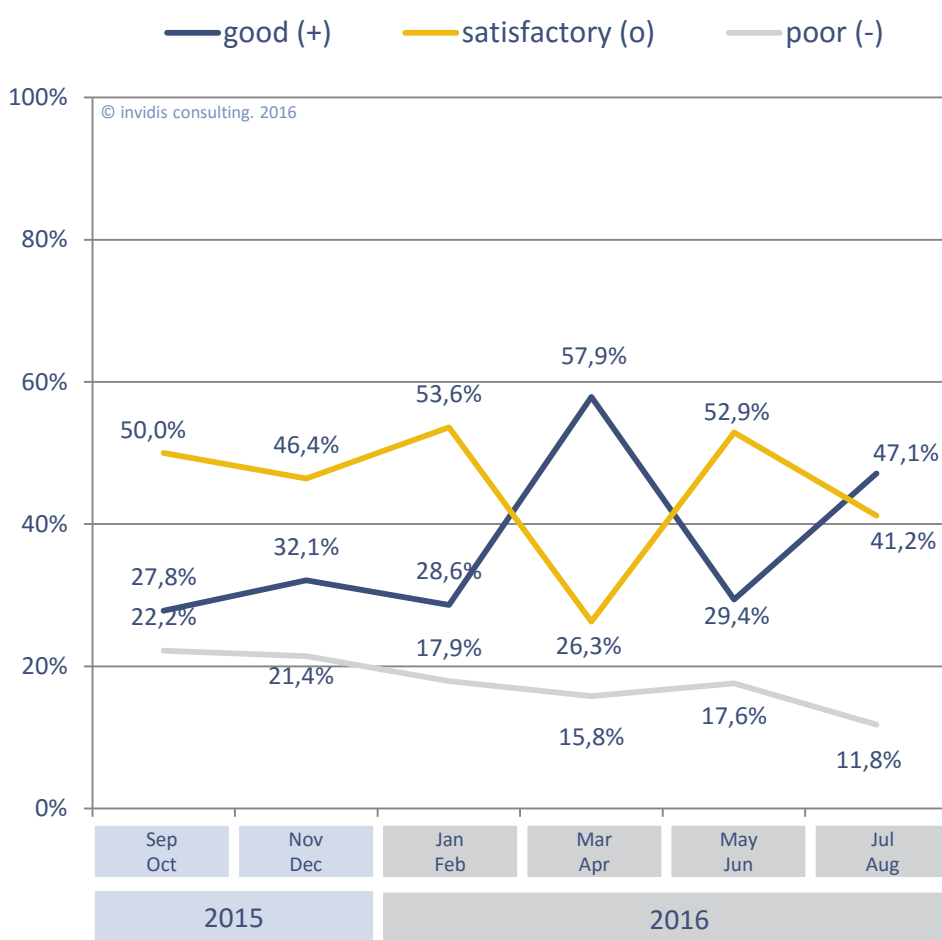


Fig. 2: DBCI Russia July | August 2016 „Business Situation“ rolling 12 months, n=17

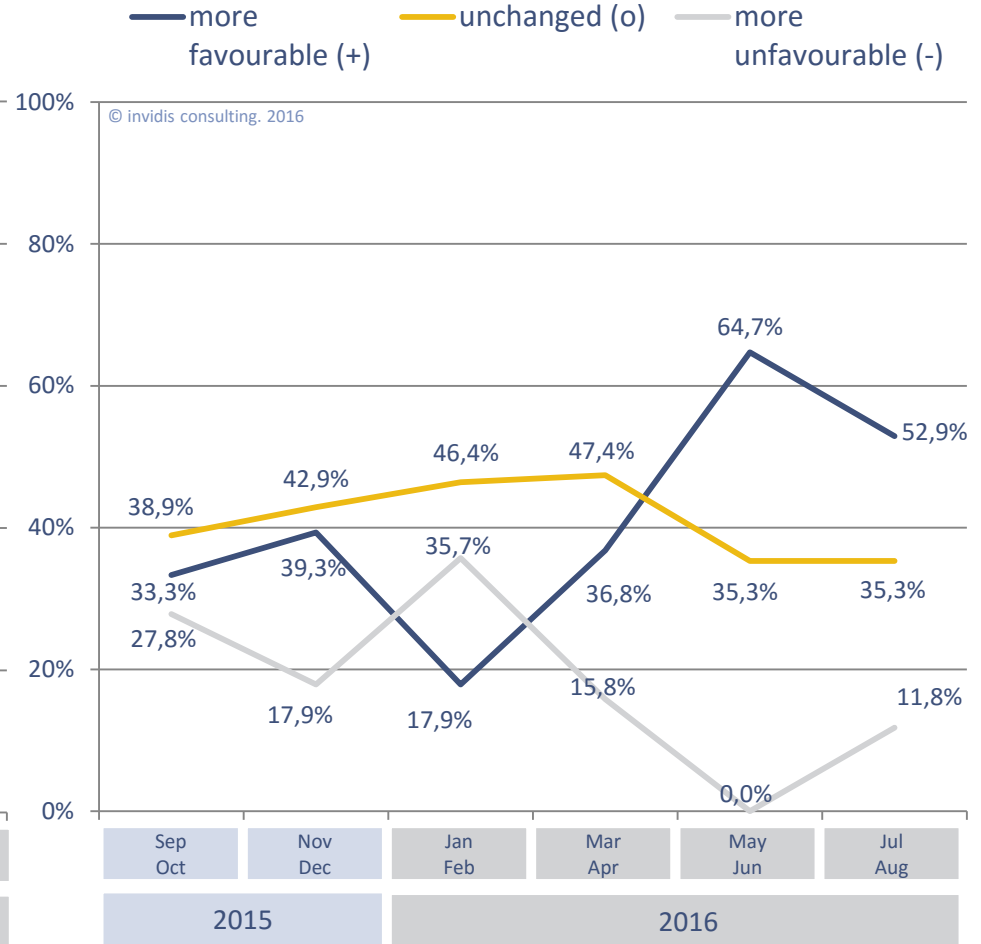


Fig. 3: DBCI Russia July | August 2016 „Expectations“ rolling 12 months, n=17



Further research | First semester 2016 with considerably higher revenues than 2015

“The revenues in the first half year 2016 have ... in comparison to the revenues of the same period in the previous year.”

Only **53,0%** of all polled companies could generate in parts a clear **increase** in **revenues** in the first half year term in 2016 compared to the same period in the previous year

23,6% of all polled companies had to accept a **decrease** in **revenues** compared to the previous year

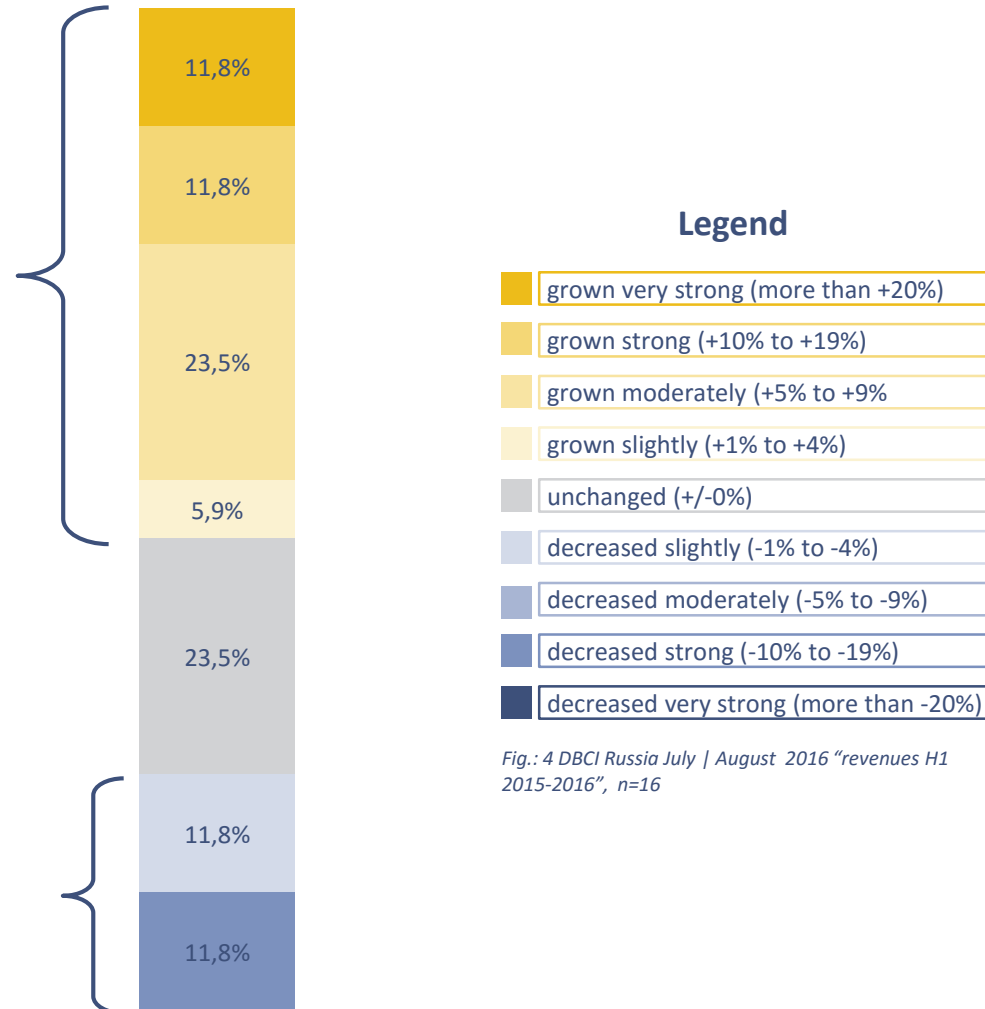


Fig.: 4 DBCI Russia July | August 2016 “revenues H1 2015-2016”, n=16

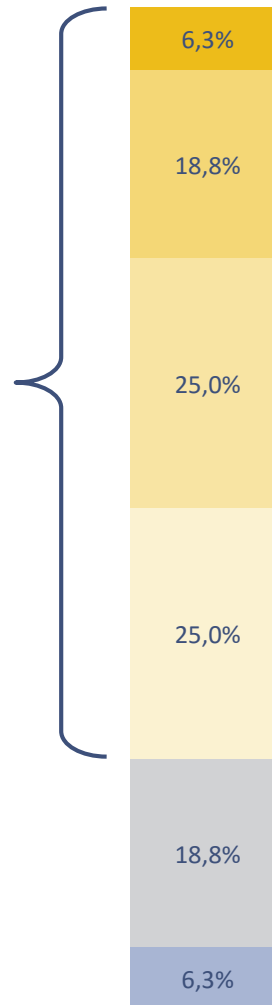


Further research | Clear increase in revenues expected for the full year 2016

“The revenues in 2016 will ... compared to the revenues in 2015.”

75,1% of all polled companies are expecting a healthy **growth** in **revenues** for the year 2016 compared with the previous year

Only **6,3%** of all polled companies expect a **decrease** in **revenues** compared to the pervious year

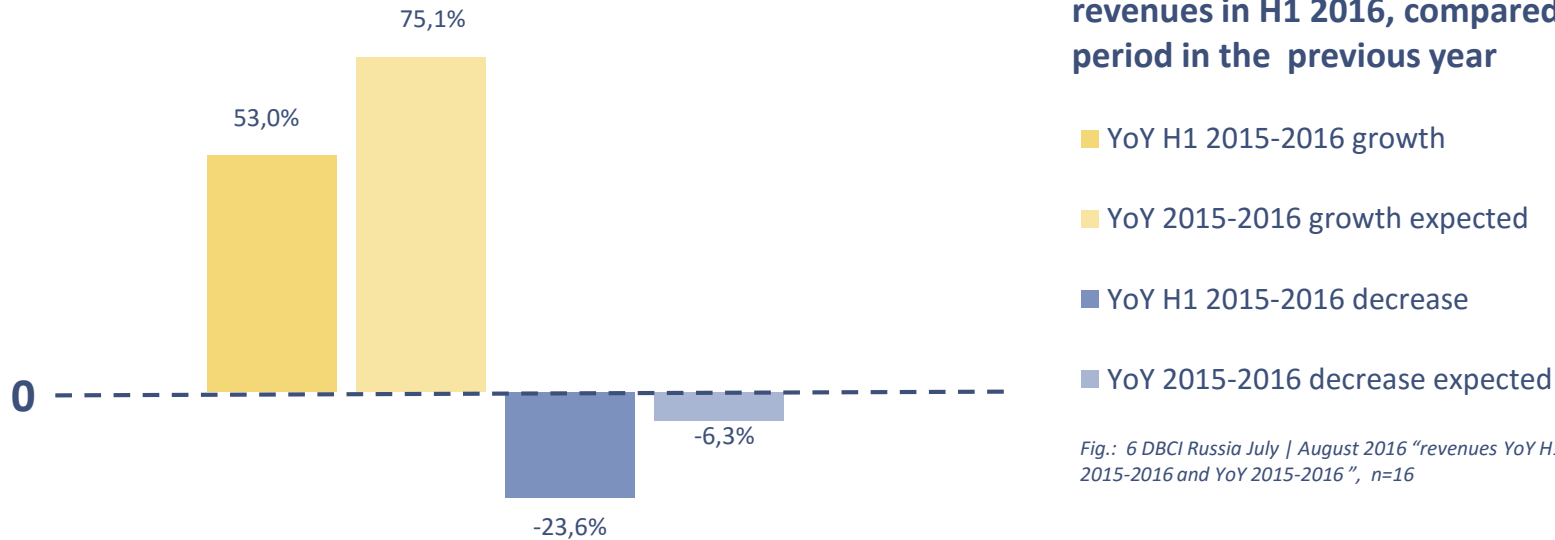


Legend

- grow very strong (more than +20%)
- grow strong (+10% to +19%)
- grow moderately (+5% to +9%)
- grow slightly(+1% to +4%)
- stay unchanged (+/-0%)
- decrease slightly (-1% to -4%)
- decrease moderately (-5% to -9%)
- decrease strong (-10% to -19%)
- decrease very strong (more than-20%)

Fig.: 5 DBCI Russia July | August 2016 “expectation revenues YoY 2015-2016”, n=16

 Further research | First semester losses expected to be contained later this year



Percentage of polled companies which have registered a growth respectively a decline in revenues in H1 2016, compared to the same period in the previous year

- YoY H1 2015-2016 growth
- YoY 2015-2016 growth expected
- YoY H1 2015-2016 decrease
- YoY 2015-2016 decrease expected

Fig.: 6 DBCI Russia July | August 2016 "revenues YoY H1 2015-2016 and YoY 2015-2016", n=16

- Over 75% of the polled companies in Russia expect to have a growth in revenues in 2016 compared to 2015
- Still 23,6% of all polled companies had to accept a decline in revenues in the first six months of 2016. However many of those companies are expecting to have balanced the losses at the end of the fourth quarter
- Traditionally the IT business has a relative calm period in the summer, followed by a strong showing towards the end of the year



Roadmap 2016 & Contact

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

← DBCI Sep./Oct. | WN41

← 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 39-40
- The next planned publication date will in week 41
- 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.

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» 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