

Russia

January | February
2017

DBCI

The pulse of the Digital Signage and DooH industry



Digital Signage & DooH
Business Climate Index



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2017 RU 100



Slightly more conservative business sentiment in Russia



Fig. 1: DBCI Russia January | February 2017 „Index“ rolling 12 months, n=13

- The Digital Signage Business Climate Index in Russia has registered a slight decline at the start of the new year. The index has decreased by 7,65 base points from 42,30 points to 34,65 base points.
- The current business situation is rated satisfactory by a majority of the market participants polled in this survey. Also the outlook towards the near future registered a more conservative expectation for Digital Signage and Digital out of Home products and services within the next six months.

Further Research

- 50% of all companies in the Digital Signage market in Russia have hired new staff in 2016. In total between 30-40 new jobs were created.
- The digital transformation in private and business life is responsible for an unbroken positive trend in the IT industry. Overall this has developed into a definite shortage of qualified personnel. Companies are more and more concerned, how they can match recruiting with their growth strategy.

Participants: n=13; Region: RU; Survey Period: 2017 calendar weeks 2-3



Robust current business situation and rather conservative outlook

Current business Situation | Russia | January/February 2017

Expectations | Russia | January/February 2017

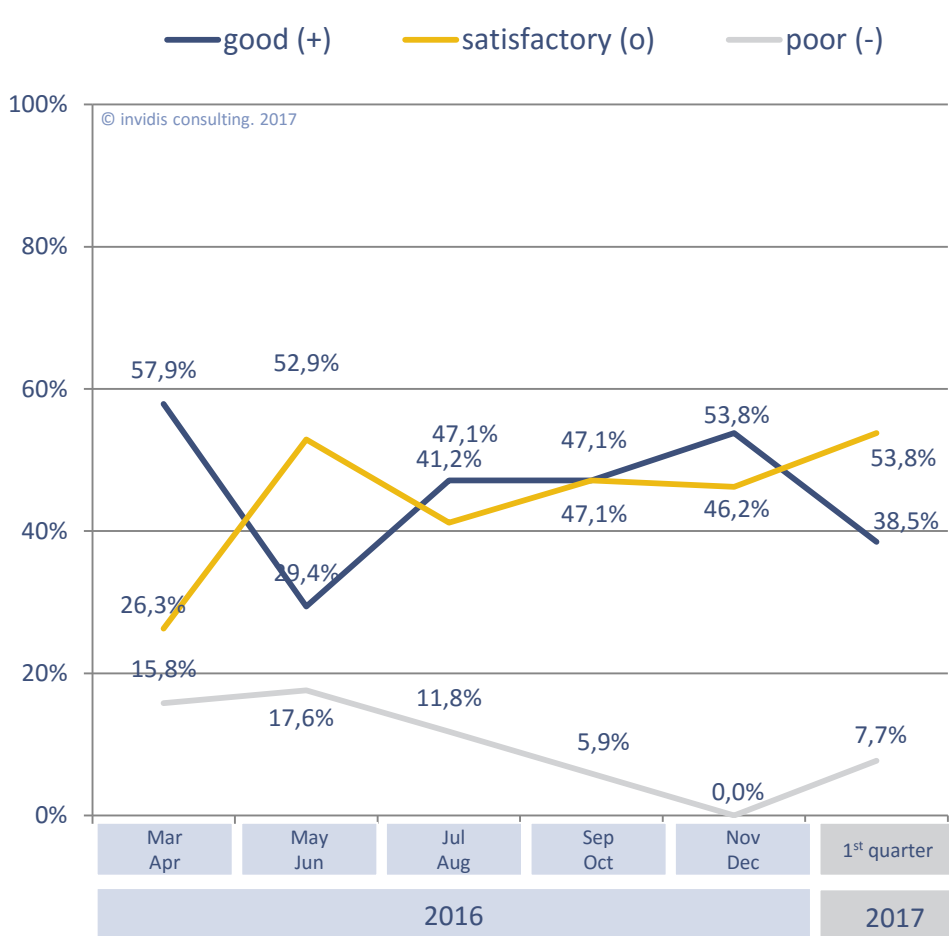


Fig. 2: DBCI Russia January | February 2017 „Business Situation“ rolling 12 months, n=13

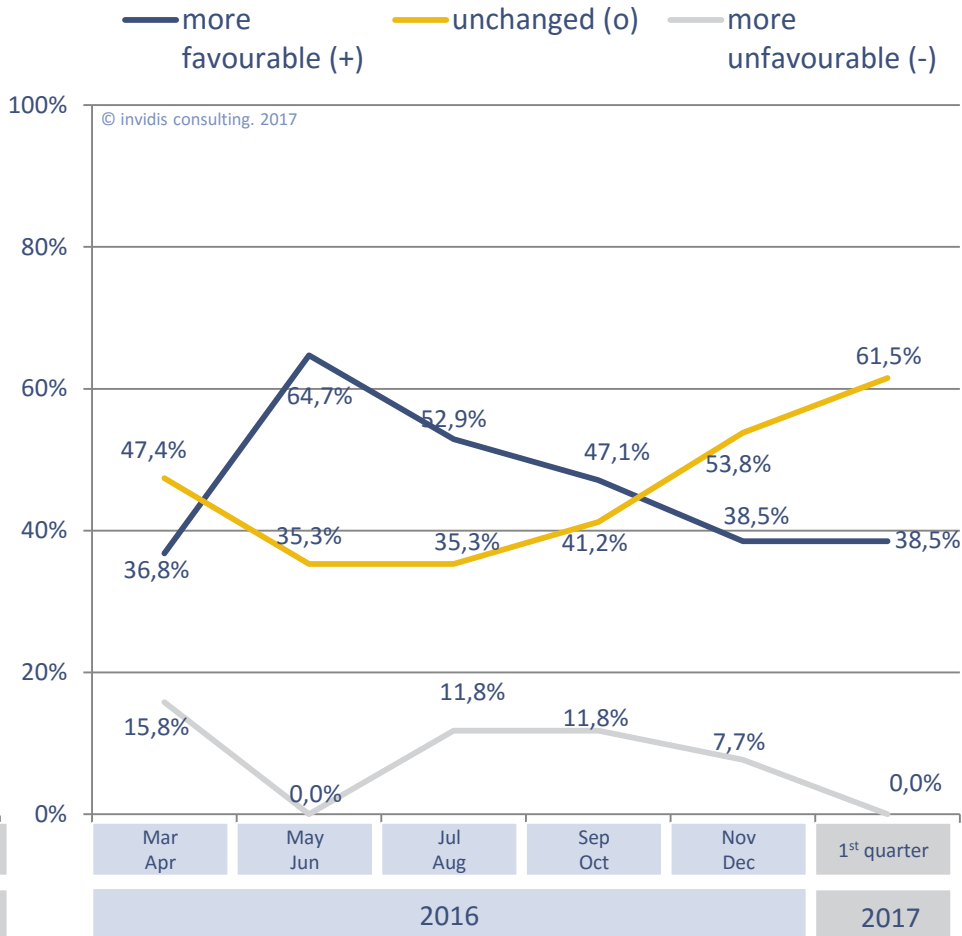


Fig. 3: DBCI Russia January | February 2017 „Expectations“ rolling 12 months, n=13



Hirings 2016 | Digital Signage creates many new jobs

- 50% of all companies in the Digital Signage market in Russia have hired new staff in 2016. In total between 30-40 new jobs were created.
- The digital transformation in private and business life is responsible for an unbroken positive trend in the IT industry. Overall this has developed into 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 digital experts on all management levels. Particularly qualified project managers and key account positions are in demand. But also technicians, programmers and administrators can be difficult to hire in highly industrialised regions where the competition for talent is strong.
- The increasing expansion in vertical markets by Digital Signage companies leads to a demand for more professionals from different industry branches.

Company growth in new jobs created 2016

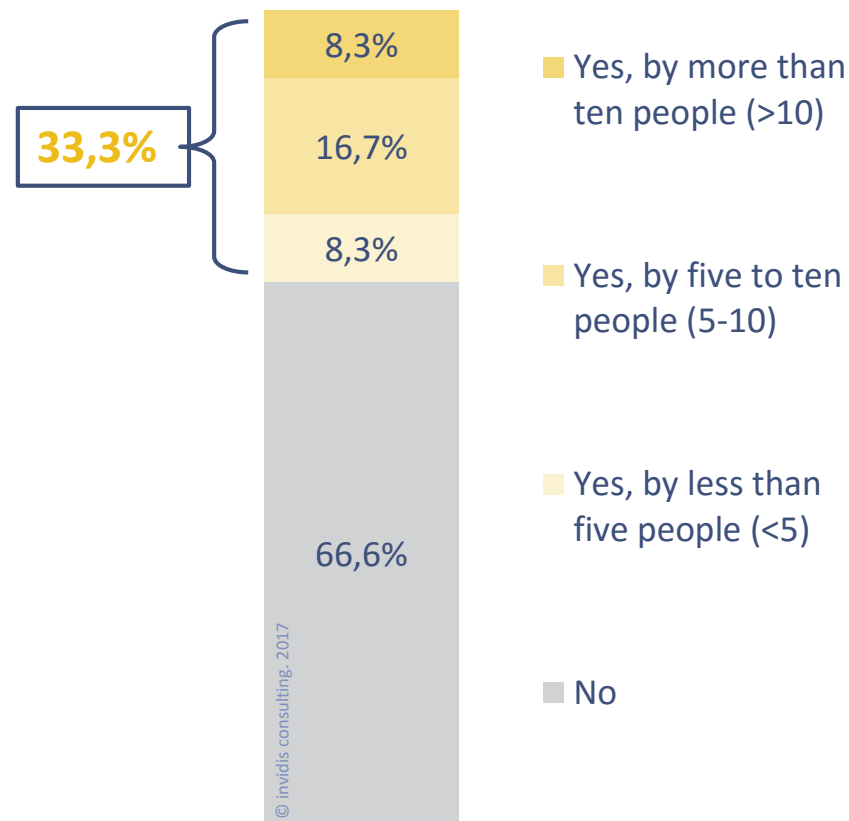


Fig. 4: DBCI Russia January/February 2017 "Hirings 2016", n=15



Roadmap 2017 & Contact

| 2017 | |
|-----------|----------------------------------|
| January | |
| February | |
| March | |
| April | |
| May | ← 2 nd quarter 2017 |
| June | |
| July | |
| August | ← 3 rd quarter 2017 |
| September | |
| October | |
| November | ← 4 th quarter 2017 |
| December | |

- The DBCI has recalibrated its iteration from a two month periode to a tree month periode starting in 2017
- The next survey will take place in calendar weeks 14-15 of 2017. The next planned publication date will be the first week of May 2017
- 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 2017. For further information please contact Daniel Russell.

invidis consulting

invidis is a renowned boutique consulting and research house based in Munich. Delivering actionable information and advise to customers across EMEA.

Contact

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DSS | The Digital Signage Summit series



- «Digital Signage Summit» is the leading event series for digital signage conferences in EMEA and North America
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- 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
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 - DSS Orlando | Orlando: 14/16. June 2017
 - DSS Europe | Munich: 5.-6. July 2017
 - DSS MENA | Dubai: September 2017
 - DSS Russia | Moscow: October 2017
 - DSS Africa | Johannesburg: October 2017
- More information at digitalsignagesummit.org