Russia

2nd Quarter 2017

DBCI

**Digital Signage & DooH
Business Climate Index**

**The pulse of the Digital Signage
and DooH industry**

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Drastically increased Digital Signage business sentiment in Russia

Fig. 1: DBCI Russia 2nd Quarter 2017 „Index" rolling 12 months, n=13

- The Digital Signage Business Climate Index in Russia has registered a drastic increase in the second quarter of the year. The index has grown by 19,15 base points from 34,65 points to 53,80 base points.

- With good answers increasing by 20% the assessment of the current business situation has become much more positive then in the previous survey.

- Also the outlook towards the near future is very optimistic Now more then 61% of the surveyed companies are expecting an *more favourable* business situation for their products and services in the next six months.

- Overall the Digital Signage industry has started well into the year, and expects to have a very good second quarter. The market is much more dynamic as anticipated.

- Microsoft Windows is still the major player in the OS market for Digital Signage installations. However, Android is gaining traction and was implemented in 16% of all projects in 2016.

Participants: n=13; Region: RU; Survey Period: 2017 calendar weeks 14-15

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Very good current business situation and strongly optimistic outlook

Current business Situation | Russia | 2nd Quarter 2017

— good (+) — satisfactory (o) — poor (-)

Expectations | Russia | 2nd Quarter 2017

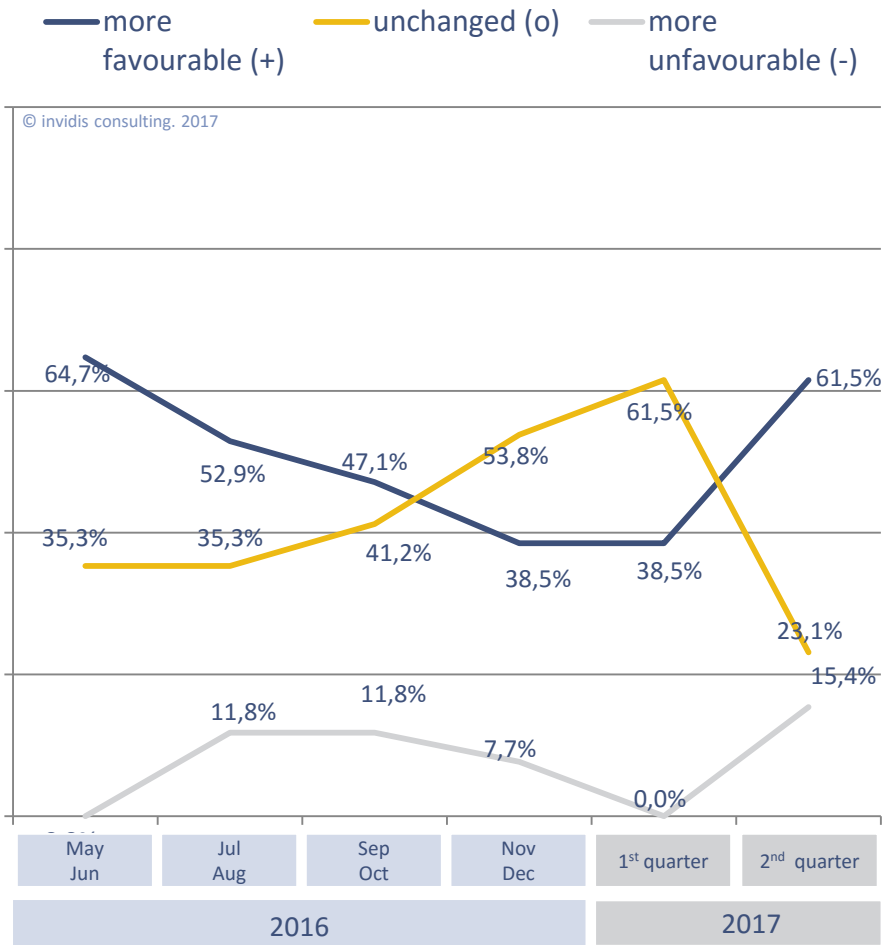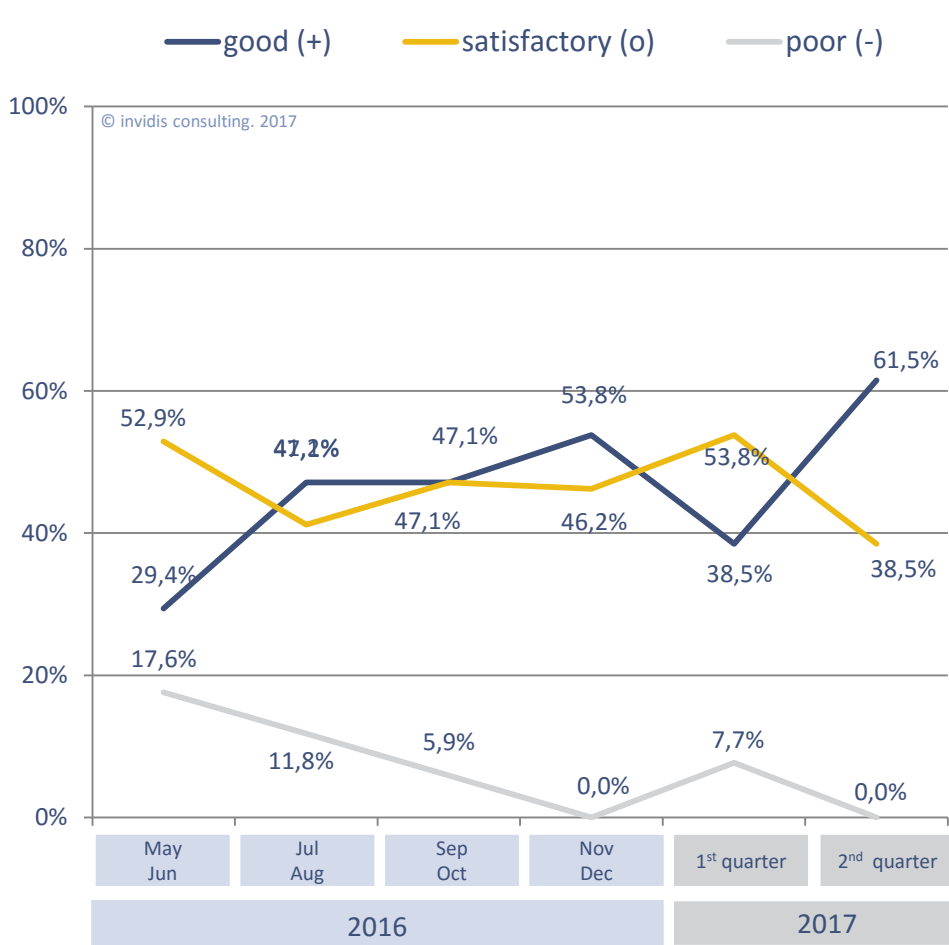— more favourable (+) — unchanged (o) — more unfavourable (-)

Fig. 2: DBCI Russia 2nd Quarter 2017 „Business Situation" rolling 12 months, n=13

Fig. 3: DBCI Russia 2nd Quarter 2017 „Expectations" rolling 12 months, n=13

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Further research | Windows in first and Android challenges

Question: How high was the percentage of operating systems used in Digital Signage Projects in 2016?

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

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

Also Linux based installations are becoming consistently 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.

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 2016
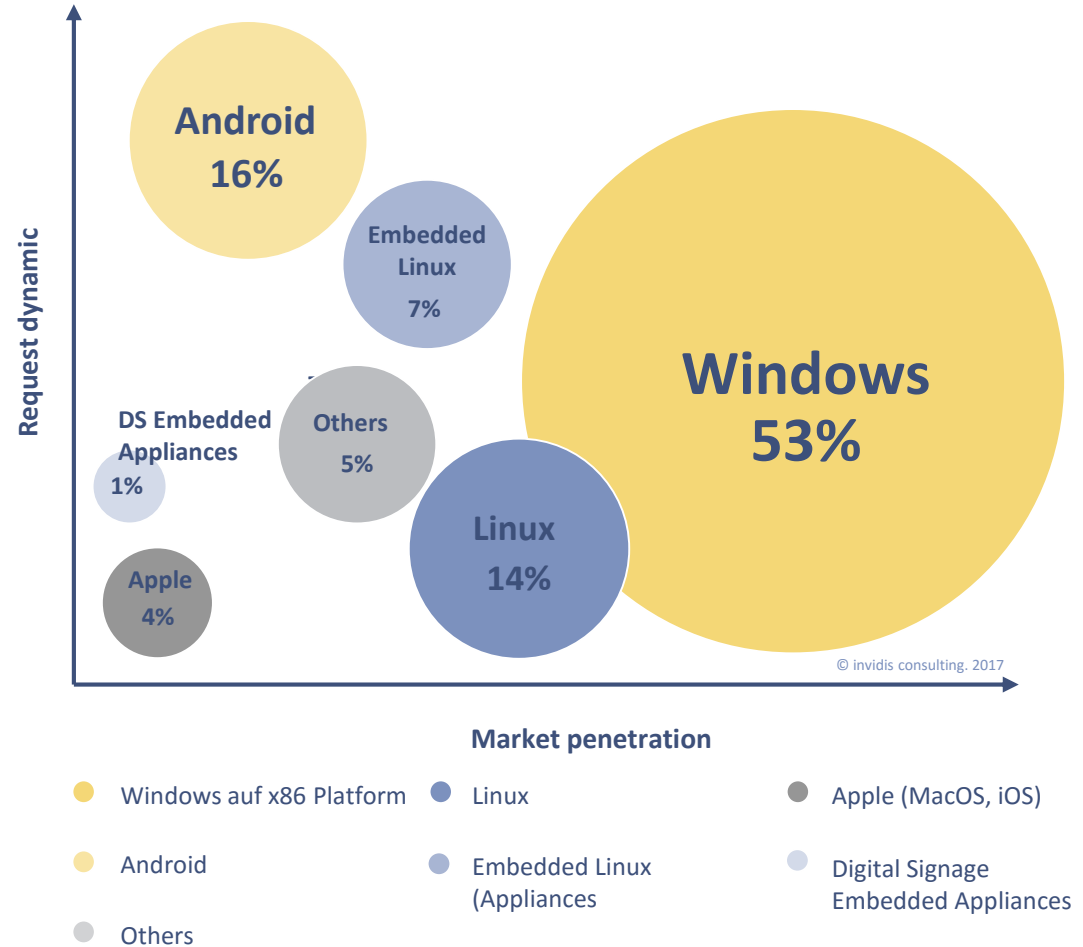
Request dynamic

Android 16%

Embedded Linux 7%

DS Embedded Appliances 1%

Others 5%

Windows 53%

Linux 14%

Apple 4%

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Market penetration

- Windows auf x86 Platform
- Linux
- Apple (MacOS, iOS)
- Android
- Embedded Linux (Appliances
- Digital Signage Embedded Appliances
- Others

Fig. 4: DBCI 2nd Quarter 2017 "operating systems 2016", n=12

Roadmap 2017 & Contact

2017
January
February
March
April
May
June
July
August
September
October
November
December

3rd quarter | 2017

4th quarter | 2017

- 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 32-33 of 2017. The next planned publication date will be the first week of September 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.

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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
- 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

- Join us at one of our upcoming events in
    - 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