



Association
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Businesses



AEB-GfK Annual Survey

Strategies and Prospects for European Companies in Russia

5 March 2019

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About the survey



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- The Survey “Strategies and Prospects for European Companies in Russia” has been conducted by the Association of European Business for more than 11 years, in cooperation with GfK - since 2011
- The main goal of the Survey is to study the opinions of the European business on:
 - The development of local business
 - The development of industries
 - Economic development of Russia
 - Financial situation and conditions of doing business
 - General business climate

Data collection



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All AEB members will be questioned personally online or offline.



Participation in the survey is anonymous and does not require putting personal data or company's data



All results will be presented only in summarized form

The Survey results are used for:



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Informing AEB members about
business climate in Russia



Government relations development

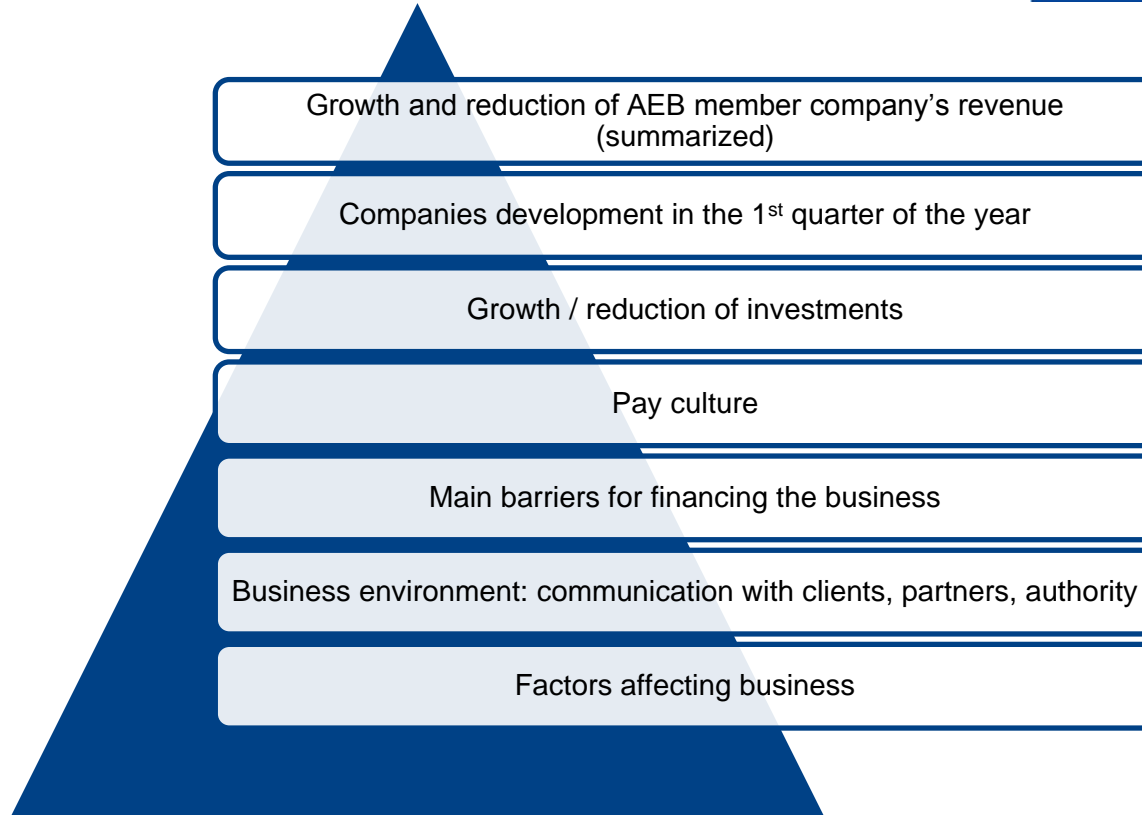


Organizing AEB events



Internal and external communications

The main survey results:



AEB-GfK publications in the top business and industry media



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Коммерсант



RG.RU
Российская Газета

интерфакс
INTERFAX

ПРАЙМ
АГЕНТСТВО ЭКОНОМИЧЕСКОЙ ИНФОРМАЦИИ



РИА НОВОСТИ



рамблер



Deutsche Welle



газета.ru

НЕЗАВИСИМАЯ

conews
ИЗДАНИЕ О ВЫСОКИХ ТЕХНОЛОГИЯХ



RETAIL.RU

AEB-GfK barometer



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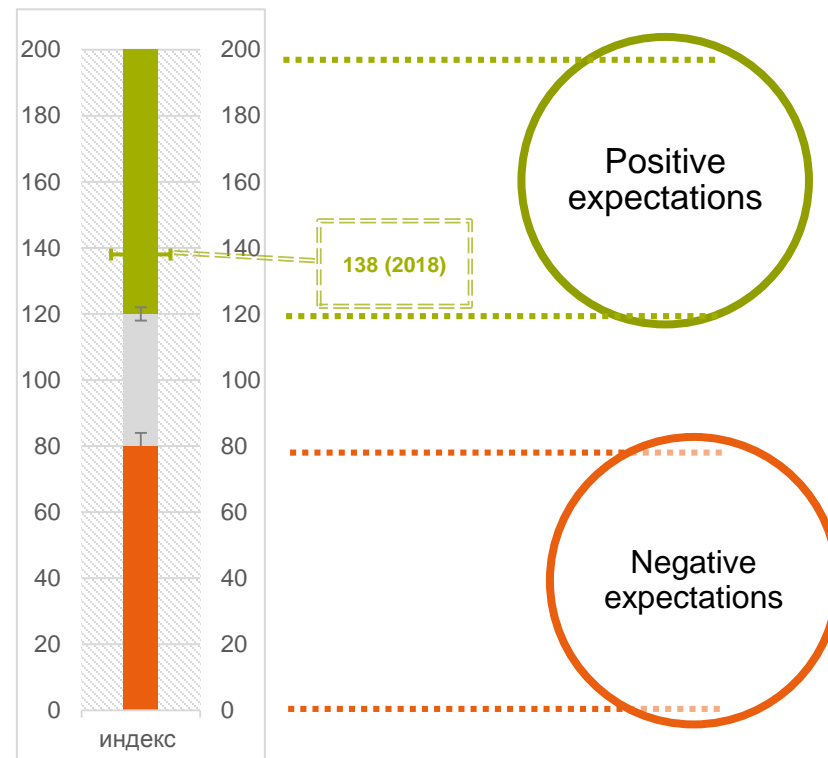


- Single indexes
- Current business situation
 - Current macroeconomic situation
 - Business development index



- Single indexes
- Business expectations
 - Short-term expectations index
 - Medium-term expectations index
 - Long-term expectations index
 - Expected revenues index
 - Expected profits index

AEB-GfK index, 2018

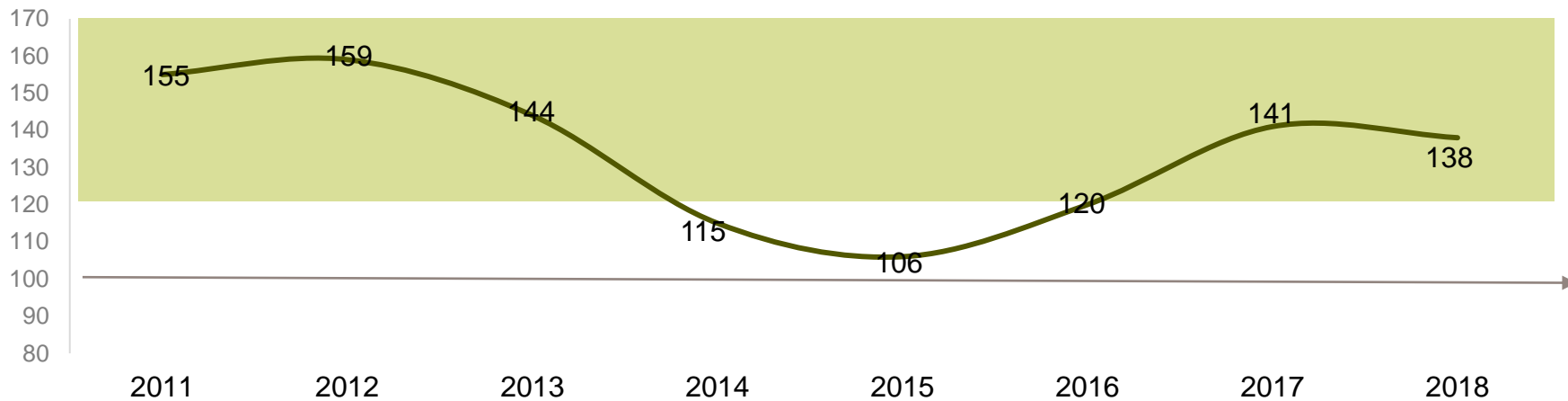


Source: Research for AEB 2018

AEB-GfK Index, 2011 -2018



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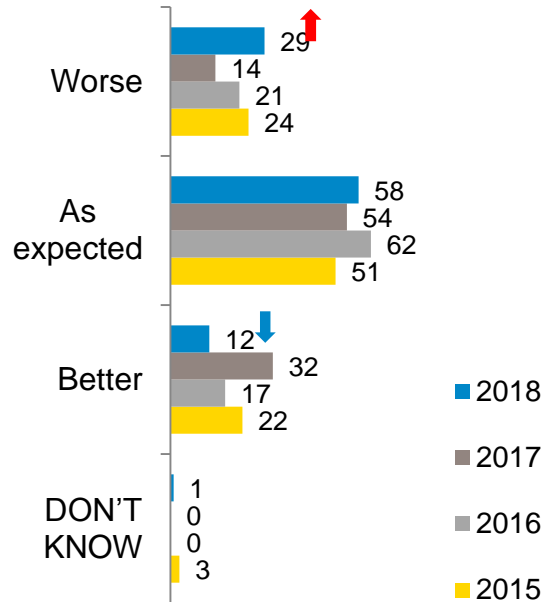


Source: Research for AEB 2018

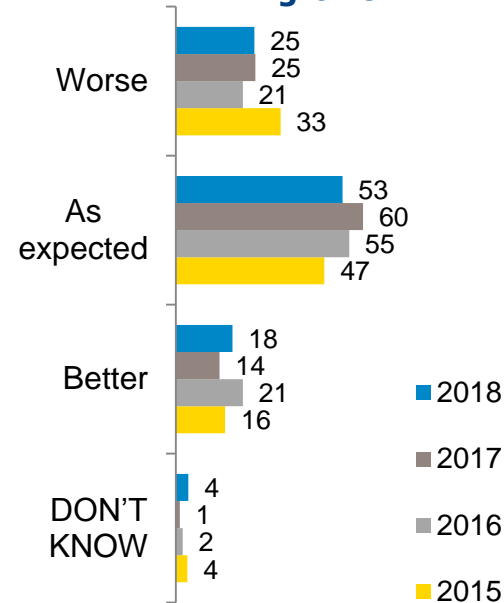
Development of the economy and business in the first 3 months, %



Expectations regarding the economy



Expectations regarding business growth



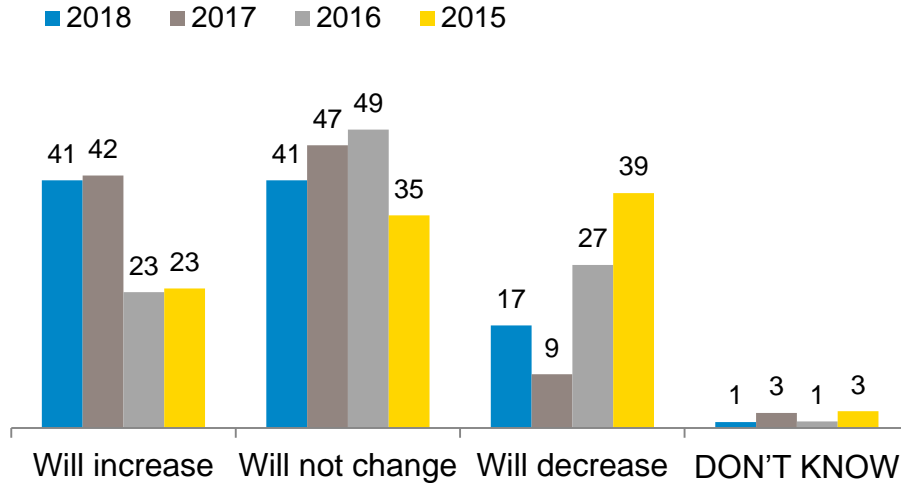
↑↓ A significant increase/decrease from 2017

Q15. How has the overall state of the economy developed in the first 3 months compared to your expectations at the start of the year?

Q19. How do business results in the first 3 months compare to targets?

Base = 76 AEB members (2018)
79 AEB members (2017)
89 AEB members (2016)
108 AEB members (2015)

Investments, %



Q13. How do you expect your investments to change in 2018 vs. 2017?

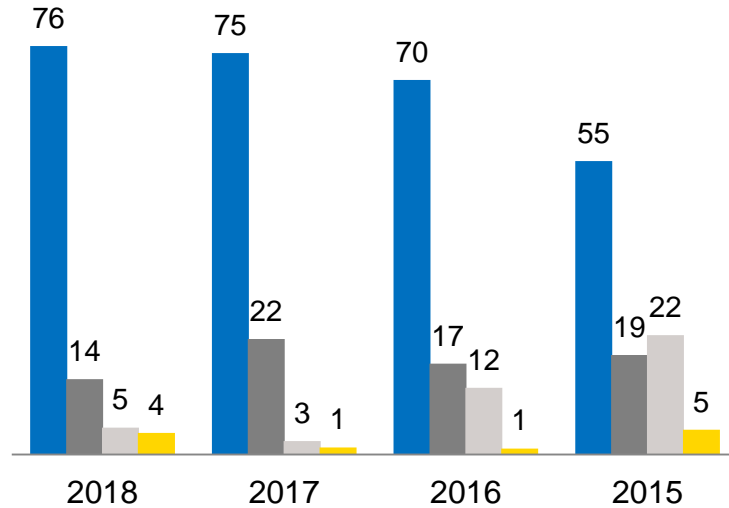
Revenue in the coming 3 years, %



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- Will increase
- Will not change
- Will decrease
- DON'T KNOW



Q20. What is your 3-year forecast for your company's business in Russia?

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Base = 76 AEB members (2018)
79 AEB members (2017)
89 AEB members (2016)
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Economic outlook for Russia in the coming 10 years, %



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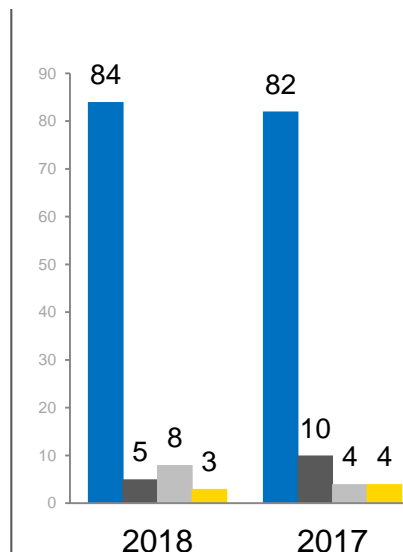
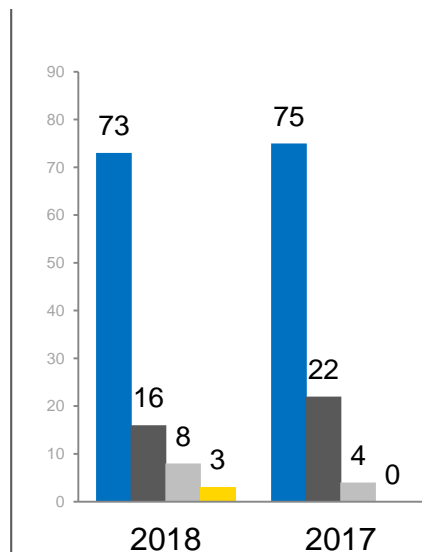
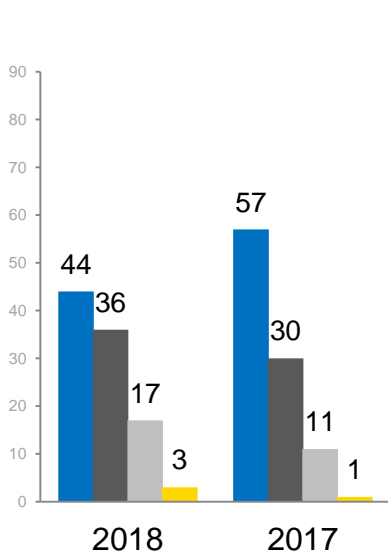


Short term (1-2 years)

Medium term (3-5 years)

Long term (6-10 years)

■ Growth ■ Stagnation ■ Decline ■ DON'T KNOW

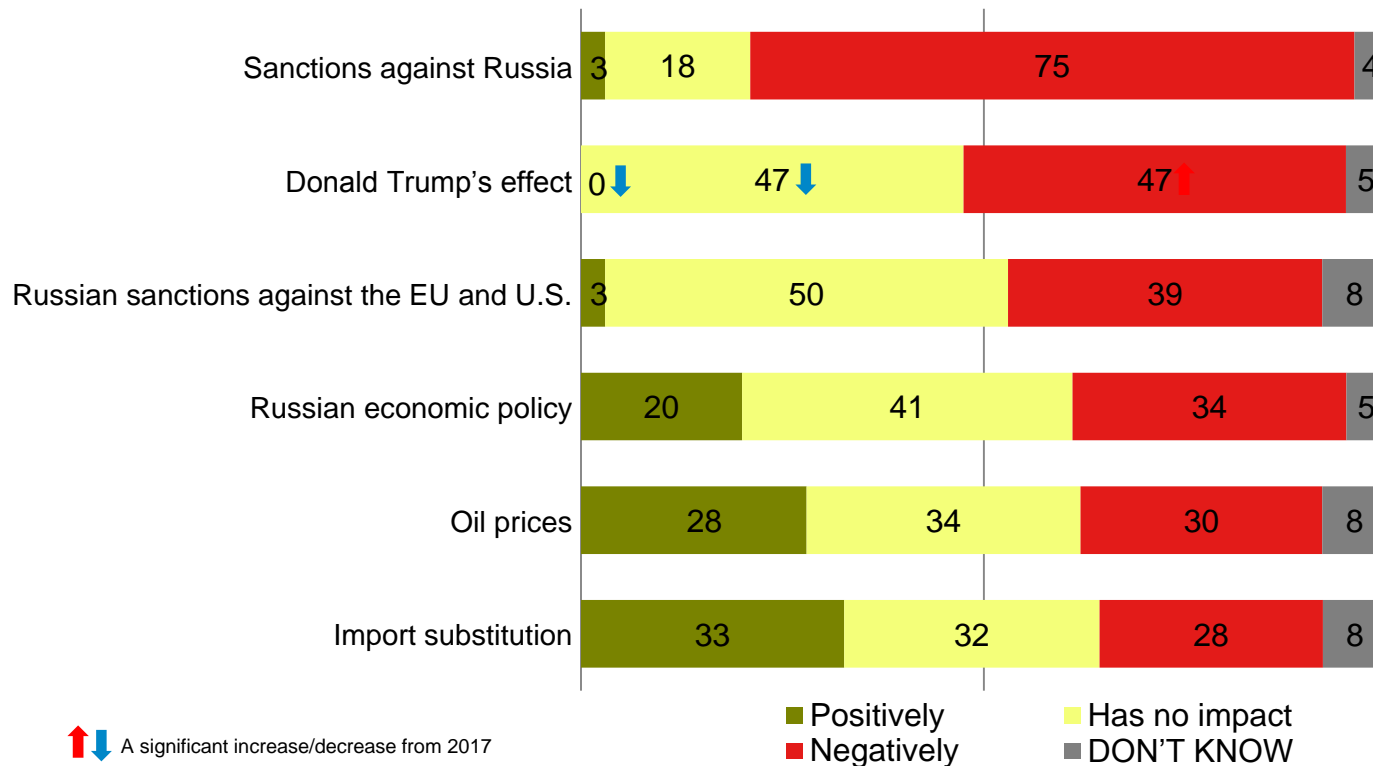


Q16. How would you evaluate the economic outlook for Russia?

Impact of various factors on company business



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Q22. What is the impact on your company of the following factors?

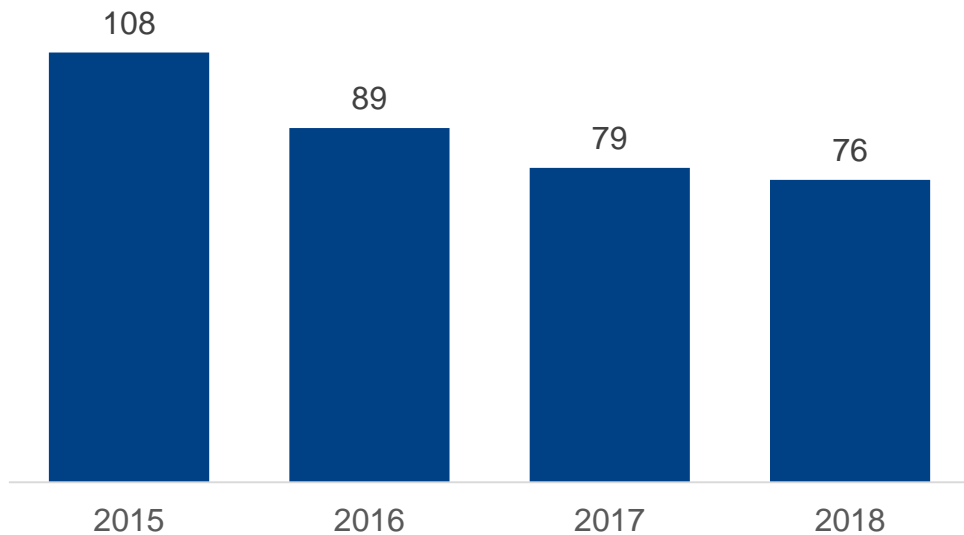
AEB-GfK survey participation



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Number of AEB members, participated in the surveys in 2015 – 2018

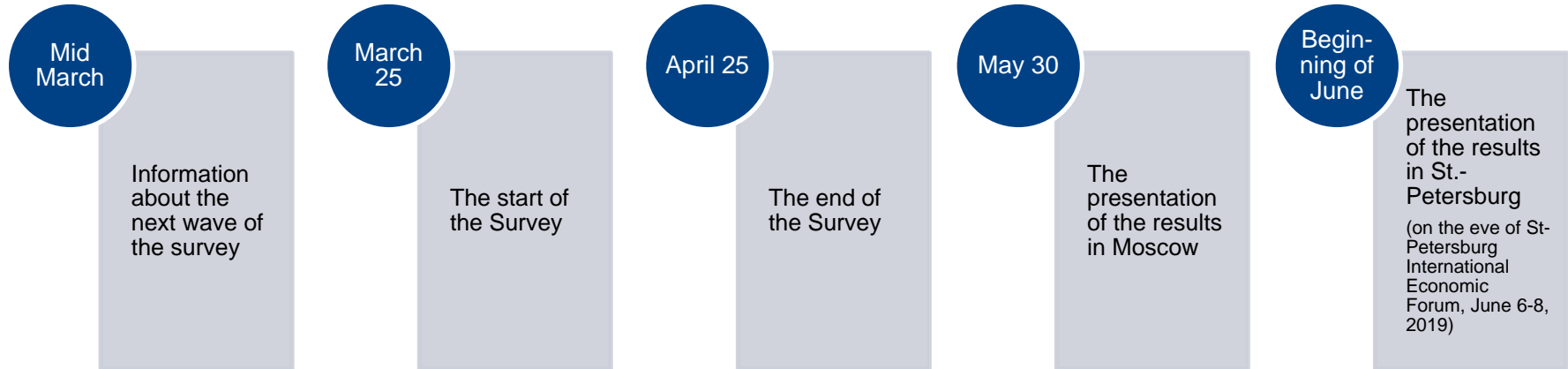


Source: AEB Survey 2011-2018

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Thank you!