invidis happy hour #2

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01 April 2020

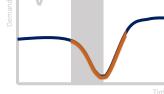
- Macro-Economic Recovery Scenarios 2020/21
- Short-term Digital Signage Opportunities



impact of COVID19 - scenarios & actions

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Rapid recovery after the crisis to normal level or even beyond

Offer solutions that help

to reduce costs, leverage

existing systems

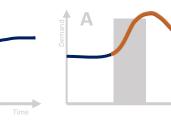
DS Actions

Examples |



• DIY

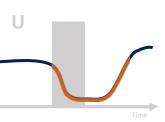




High demand after the crisis but not at peak level

Offer turn-key services that can be implemented quickly

- Food
- Home, Beauty
- Corp. Comms



Slower recovery after the crisis to normal level

Offer solutions that help to reduce costs, trigger discussions on mid-term solutions to win back customers

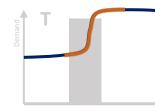
- Fashion & Lifestyle
- Electronics / Telco
- Automotive



Slow recovery after crisis, changed customer habits

Trigger strategic discussions on the value of DS for changed business models

- Airlines & Travel
- Hospitality

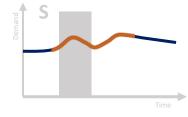


Time Demand remains at a high

level in the medium and long term

Emphasize scalability of DS solutions, fast implementation and speed to market are key

- Education
- Healthcare



COVID-19 does not fundamentally change the business model

Keep working on digital transformation

• Services

Source: invidis/Porsche Consulting

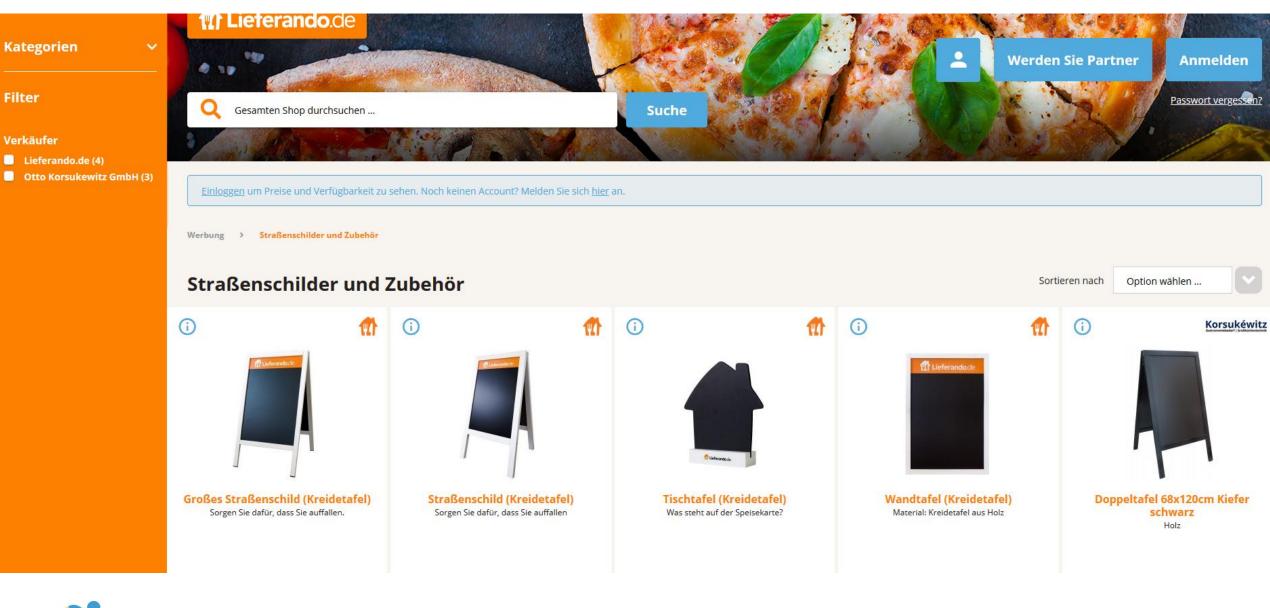




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- Not many businesses are currently operating with direct customer contact
- Limited footfall still in pedestrian areas and other public spaces, shopping windows remain an attractive space
- Solutions closed stores
 - Leveraging existing systems moving existing DS systems to the shop front / entrance
 - Extended Shelf / Touchscreens in shop windows (online shop) not recommendable
- Solutions open businesses
 - Digital A-Frames / totems for supermarket entrances (preferable full-service incl. content on rental basis)
 - Analytics / counter at entrance to manage crowds / inform customers about quieter times (simple, pragmatic solutions)









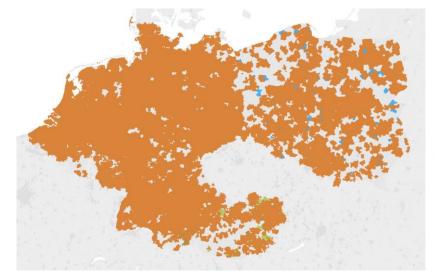
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Takeaway.com (e.g. Lieferando.de)

- 53k restaurants
- 159m orders
- 3k orders per restaurant
- 2019: 1.5bn EUR revenue (GMV)

Restaurants manage content via Takeaway.com / API for digital signage



Total food delivery in Leading Markets^{1,2}



Takeaway.com market penetration January 2020





LOOKING FORWARD TO SEEING YOU IN MUNICH! DSS EUROPE 2020 | 1-2 JULY

A JOINT VENTURE OF





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