



# invidis happy hour #3

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07 April 2020

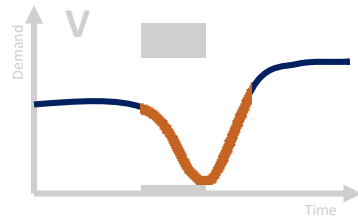
- **Preparations for Restart - Ready to reboot**
- **Mid-term Digital Signage Opportunities**



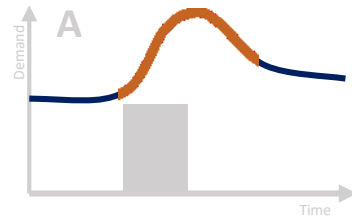
# impact of COVID19 - scenarios & actions

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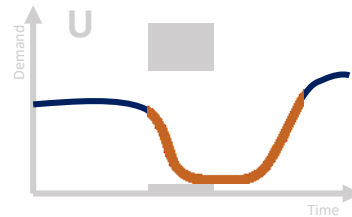
Types |



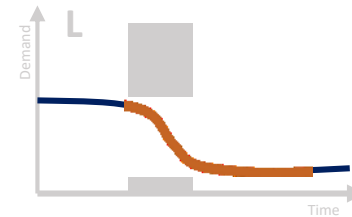
Rapid recovery after the crisis to normal level or even beyond



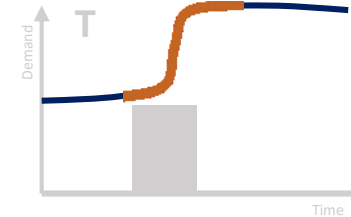
High demand after the crisis but not at peak level



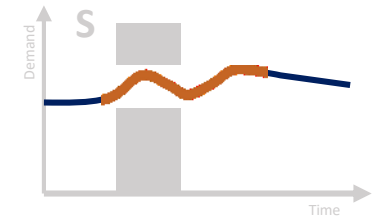
Slower recovery after the crisis to normal level



Slow recovery after crisis, changed customer habits



Demand remains at a high level in the medium and long term



COVID-19 does not fundamentally change the business model

DS Actions |

Offer solutions that help to reduce costs, leverage existing systems

Offer turn-key services that can be implemented quickly

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

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

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

Keep working on digital transformation

Examples |

- Restaurants
- DIY
- Banking

- Food
- Home, Beauty
- Corp. Comms

- Fashion & Lifestyle
- Electronics / Telco
- Automotive

- Airlines & Travel
- Hospitality

- Education
- Healthcare

- Services



# Return Scenario to New Normal

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	Phase I	Phase II	Phase III	Phase IV
What you have to believe	The curve is flattening	Number of acute new cases decline	Back to individual case tracking	Pandemic under control
Daily life	<ul style="list-style-type: none"> <li>• Social Distancing</li> <li>• Face Protection</li> <li>• Separate restrictions by age groups</li> <li>• Access / Crowd Control (App)</li> </ul>	<ul style="list-style-type: none"> <li>• Travel Domestic / Intra-EU</li> <li>• Small Gatherings up to 10/20 people</li> <li>• Access control at entrances</li> </ul>	<ul style="list-style-type: none"> <li>• European travel restrictions lifted</li> <li>• Gatherings up to 100 people</li> <li>• Relaxed access controls</li> </ul>	<ul style="list-style-type: none"> <li>• “The New Normal” or “The next normal”</li> </ul>
Overall business	<ul style="list-style-type: none"> <li>• Home Office as long as possible</li> <li>• Small Shops reopen</li> <li>• Economic activities still very limited</li> <li>• Focus on liquidity / cash management</li> <li>• Preparations for Reopening</li> </ul>	<ul style="list-style-type: none"> <li>• Offices reopen for staff</li> <li>• Shopping areas back to "new normal" - still considerably less footfall</li> <li>• Strict cost control</li> <li>• Focus on keeping/winning back customers</li> </ul>	<ul style="list-style-type: none"> <li>• Offices reopen for guests</li> <li>• Still hesitant consumer spending</li> <li>• Economic stimulus measures start</li> <li>• Insolvency bomb will detonate</li> <li>• Only essential investments</li> <li>• Restart of project work</li> </ul>	<ul style="list-style-type: none"> <li>• Verticals recover at different speeds (VAULTS scenarios)</li> </ul>
Digital Signage	<ul style="list-style-type: none"> <li>• Quick fixes (e.g. access control, information)</li> <li>• Strategies (tech choices, business models)</li> </ul>	<ul style="list-style-type: none"> <li>• Productizing quick fixes</li> <li>• Preparation for strategic projects</li> </ul>	<ul style="list-style-type: none"> <li>• Order of essential short-term projects</li> <li>• Restart of hibernated projects</li> <li>• Drive strategic projects</li> </ul>	<ul style="list-style-type: none"> <li>• “The New Normal” or “The next normal”</li> <li>• Mix of “old” business and new strategies</li> </ul>





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# DS Tech Impact

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## Increased demand for

- Basic Analytics & Communication (Counting, Distance) w/speakers, displays, LED
- Information Screens (Totems, Digital A-Frames)
- Touchless Interactive Solutions (Voice, Eyes & Mobile)
- Cashless
- Cross-Channel Solutions



# Digital Signage Business Climate | April 2020

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## Key Findings Mid March vs Beginning of April

- **EMEA**
  - sentiment significantly improved – less revenue impact, more opportunities
  - V-shaped recovery expected
- **DACH**
  - Sentiment improved, but outlook more negative than EMEA
  - Critical phase expected to last longer
  - Two groups – more optimistic (EMEA-like) and very pessimistic



# Early indicator 2021

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## Cancelled projects

Almost 80 per cent of architects reported project delays due to the corona crisis, with over a third seeing their projects cancelled entirely.

Source: Royal Institute of British Architects | n=1.000 architects | April 6<sup>th</sup> 2020





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