



From Fragmentation to Integration

How AI and Managed Services Drive Consolidation



invidis.com



invidis consulting

- is a boutique digital consultancy with expertise in digital signage, digital retail, digital-out-of-home, and smart cities based in Munich/Germany
- specializes in scalable and sustainable digital concepts and strategies
- advises clients across the world
- thinks strictly customer-centric, but with store operations and backend processes in mind
- makes “gut feelings” quantifiable and actionable with Retail Analytics and AI
- supports management to better understand “retail experiences” and competitive dynamics
- helps clients to design deliverable strategies while keeping scope and budgets in focus
- has developed into one of EMEAs leading, supplier independent digital signage consultancies since 2006
- is industry thought-leader presenting more than 50 times annually at conferences around the globe

Editorial



Events



Research



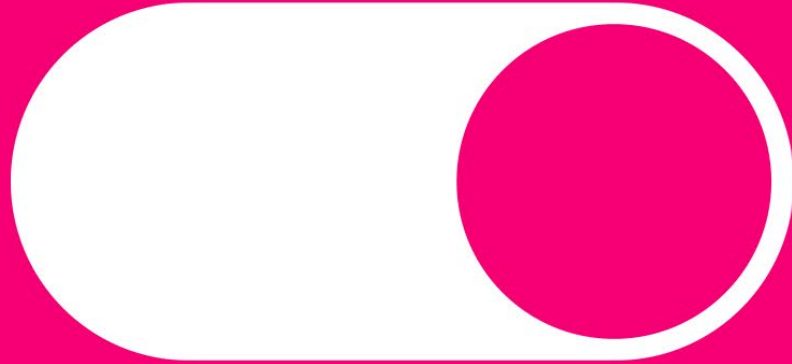
About us

More of invidis



IN COOPERATION WITH SIXTEEN:NINE

Managed Signage



Unlocking new services

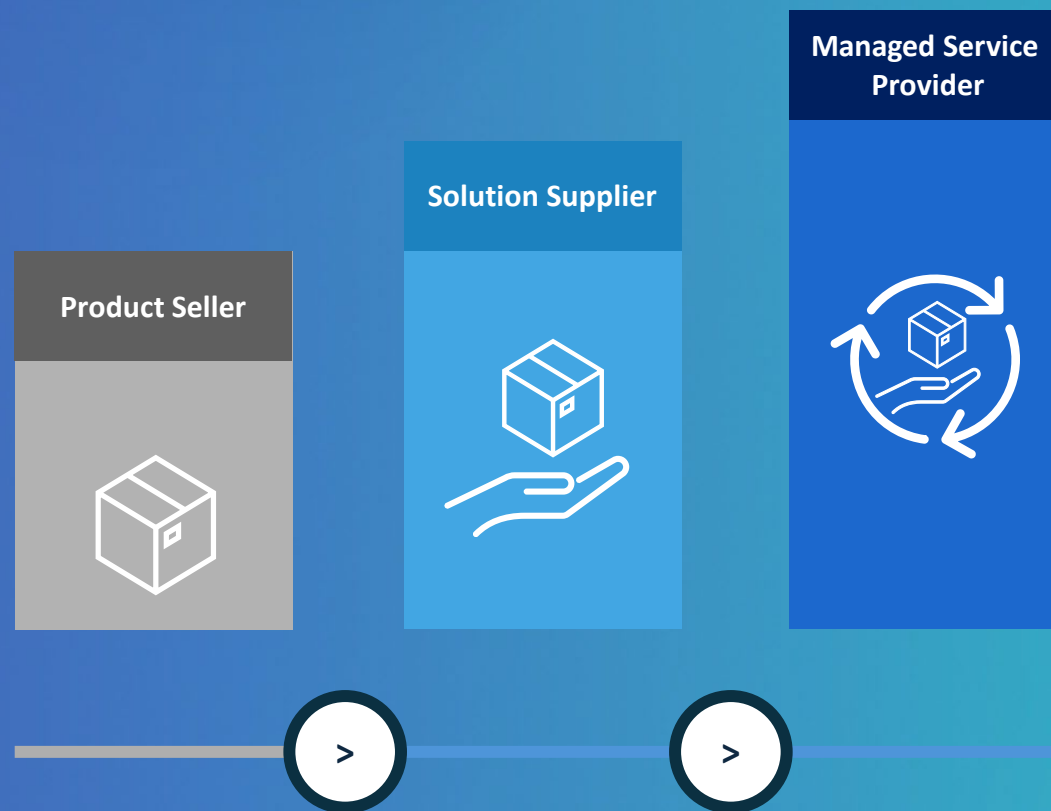


YEARBOOK
DIGITAL SIGNAGE & DOOH

2025



From Hang & Bang to trusted Service Partner



DSE



● **Managed Signage**

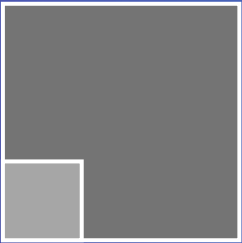
Service / Maintenance

Reactive / “error fixing”
after installation



**Operational
Services**

“Ownership” for
operations after
installation



**Screen as a
Services**

“Ownership” of the full
hardware lifecycle of a network



**Signage as a
Services**

Full responsibility for
the complete DS network
solution (on behalf of the client)



Artificial Intelligence

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AI

AI First

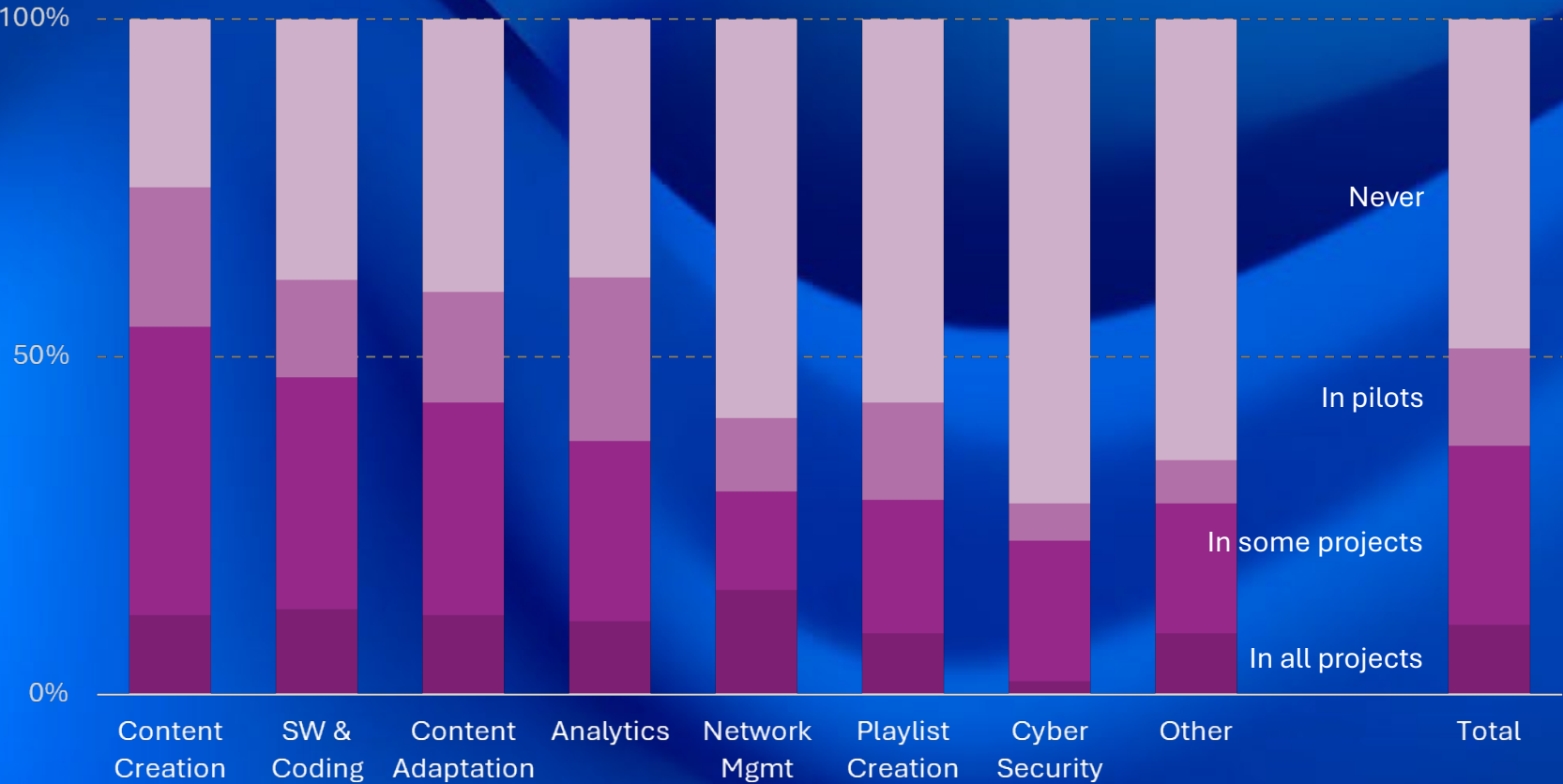
Cloud First

Mobile First

Online First

**“AI-first is not an opportunity,
it’s a necessity for survival”**

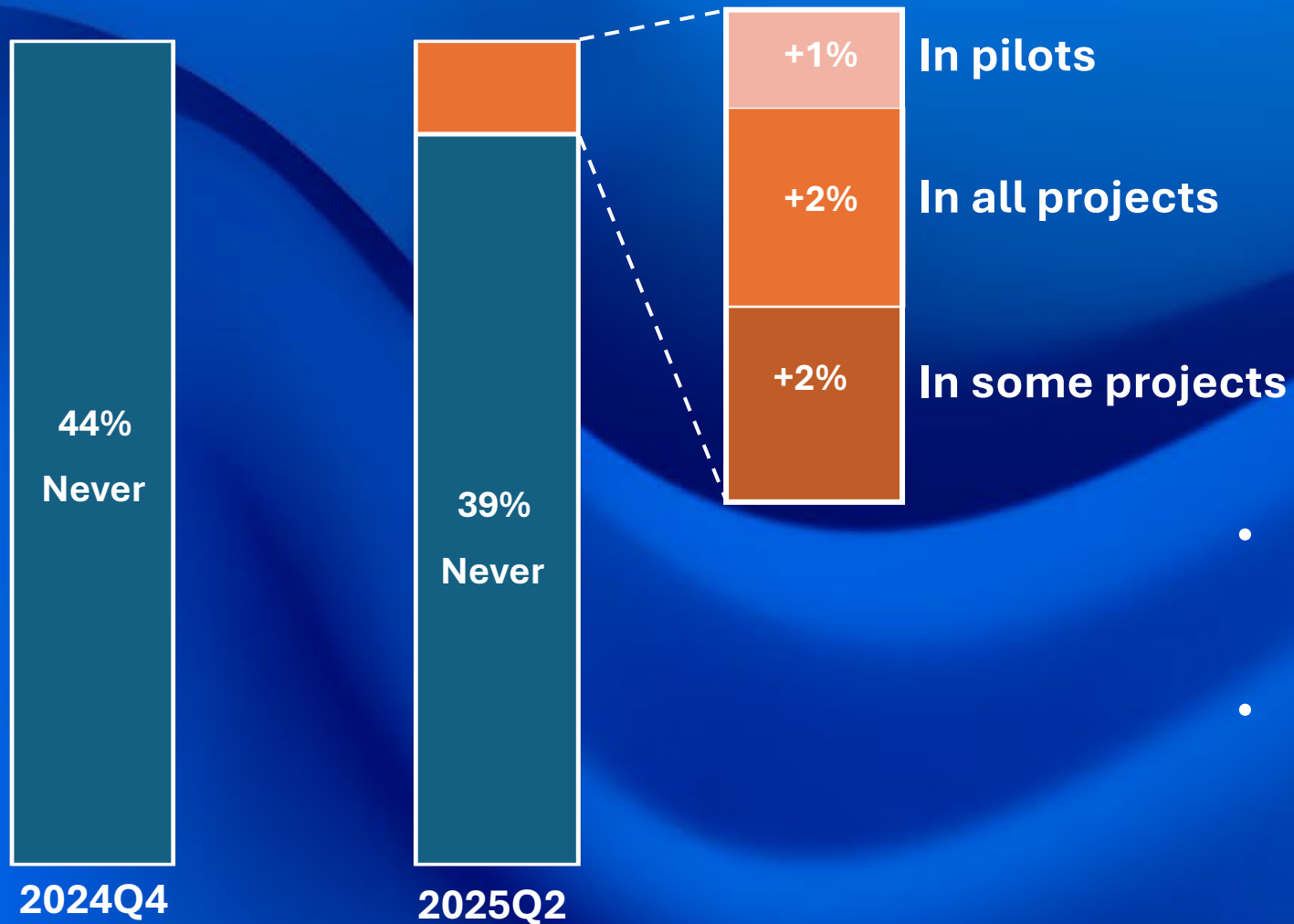
How do you use AI in digital signage?



- Still **Early Days** for AI in Digital Signage
- **Content, Software Development and Analytics** are key application areas

AI in Digital Signage

Source: DBCI Q4 2024, N=112
Q: How do you use AI in digital signage?



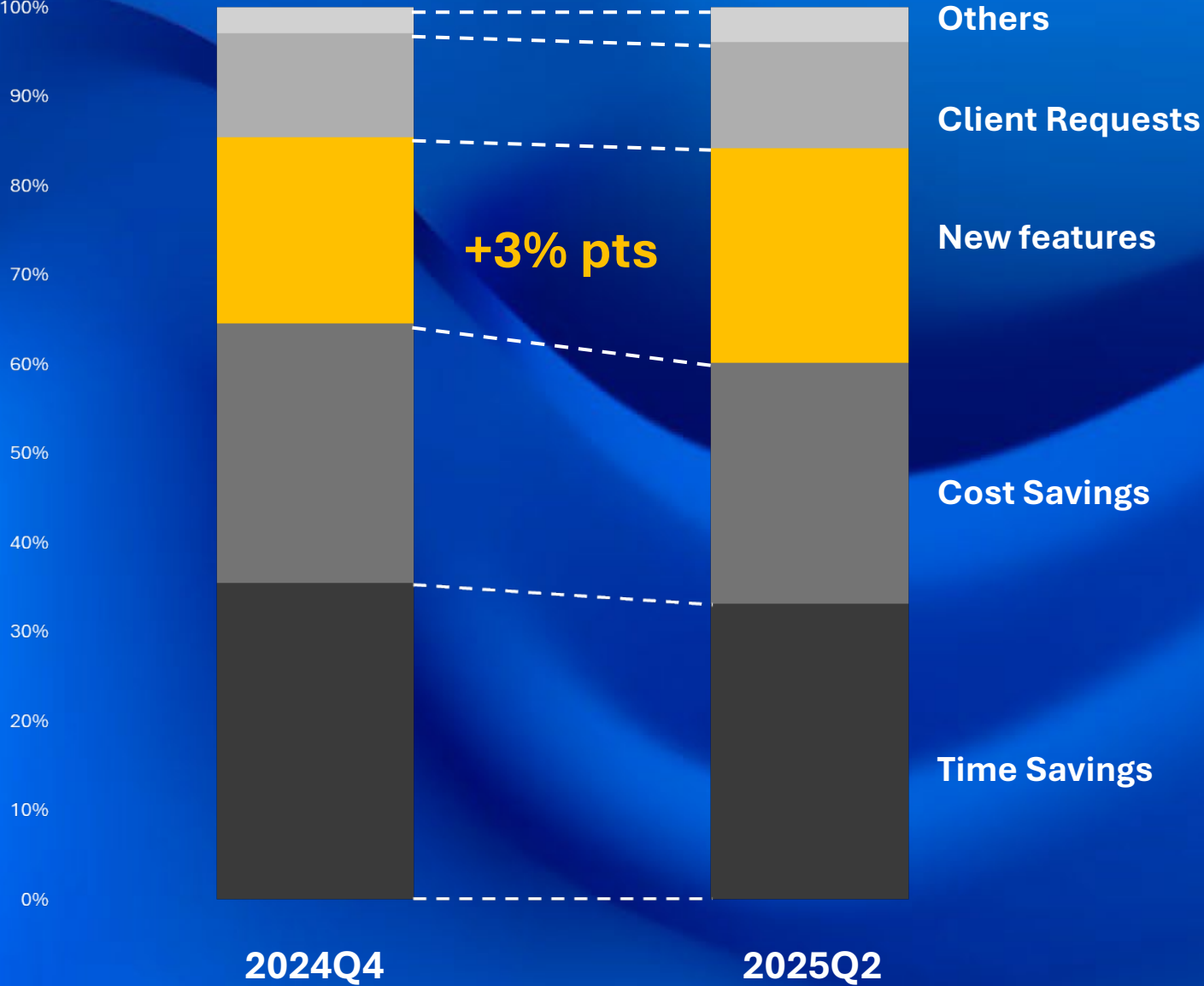
- AI adoption is rising slowly in digital signage.
- More potential to realize; Many processes still have little to no benefit from AI.

AI



- **Software Development** takes **#1 spot** in productive AI use
- **GenAI** use cases **prevail** over **Analytic AI**

Ranking Productive AI-Use



- **Savings' share decreased slightly**, maintaining their position as the **main driver**
- **Innovation** on the rise: Innovation-led AI use surged **3% pts**
- **Client Requests** continue to be amongst areas with **lowest AI demand**

What's driving AI use?

Mergers & Acquisitions

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M&A Trends

- Main drivers: AI & Managed Services
- Consolidation is picking up as industry is moving from hang & bang to managed services
- Regional solutions are replaced by global concepts
- IT-Integrators discover ProAV / Digital Signage
- Hardware Vendors expand downstream (e.g. Software, Services, Security)
- Lifecycle Management & Sustainability requires solid balance sheet, refurbishing & financing



XTG Group (USD 400m) | AVI-SPL total 1.8bn USD



Revenue: 576m USD

RICOH

Revenue: 700m USD | Total: 15.5bn USD



Total: 1.6bn USD



Combined Revenue: 400m USD



Mergers & Acquisitions



ScreenCloud



Wallboard

AVI  SPL

VERTISEIT

 poppulo

STRATACACHE

PLAYipp

NAVORI 
Innovation & Performance

CreativeRealities 

econocom

Expect more



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SIXTEEN:NINE
ALL DIGITAL SIGNAGE, SOME SNARK

