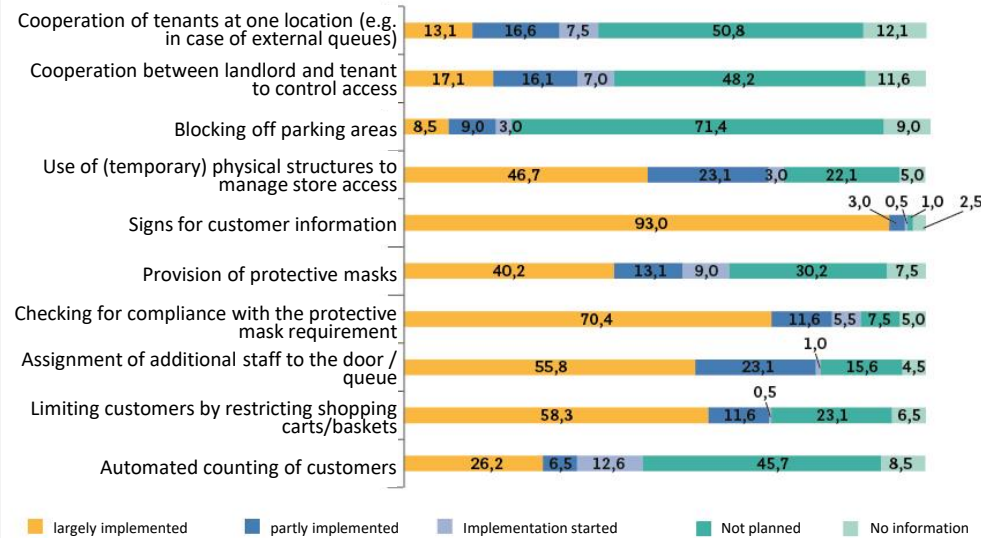# invidis happy hour #6

invidis X world

05|06 May 2020

- **Retail-Frontline Experiences**
- **Access Control | Keeping Customers Safe | Communication**
- **Online Development March-April 2020**

Access Control

Please indicate what measures your company takes to manage access to the store

In percent

Measure	largely implemented	partly implemented	Implementation started	Not planned	No information
Cooperation of tenants at one location (e.g. in case of external queues)	13,1	16,6	7,5	50,8	12,1
Cooperation between landlord and tenant to control access	17,1	16,1	7,0	48,2	11,6
Blocking off parking areas	8,5	9,0	3,0	71,4	9,0
Use of (temporary) physical structures to manage store access	46,7	23,1	3,0	22,1	5,0
Signs for customer information	93,0	3,0	0,5	1,0	2,5
Provision of protective masks	40,2	13,1	9,0	30,2	7,5
Checking for compliance with the protective mask requirement	70,4	11,6	5,5	7,5	5,0
Assignment of additional staff to the door / queue	55,8	23,1	1,0	15,6	4,5
Limiting customers by restricting shopping carts/baskets	58,3	11,6	0,5	23,1	6,5
Automated counting of customers	26,2	6,5	12,6	45,7	8,5

■ largely implemented   ■ partly implemented   ■ Implementation started   ■ Not planned   ■ No information

n = 199, Mehrfachnennungen möglich
Abweichungen zu 100 % rundungsbedingt

Quelle: EHI Retail Institute

EHI handelsdaten.de   EHI Retail Institute

- First measures that were implemented:
    - Customer information signs
    - Entrance and mask control by staff
    - Counting / limiting customers with carts / bags

- Physically limiting store access takes more time

- Automated customer counting is (currently) only considered by about 50% of respondents
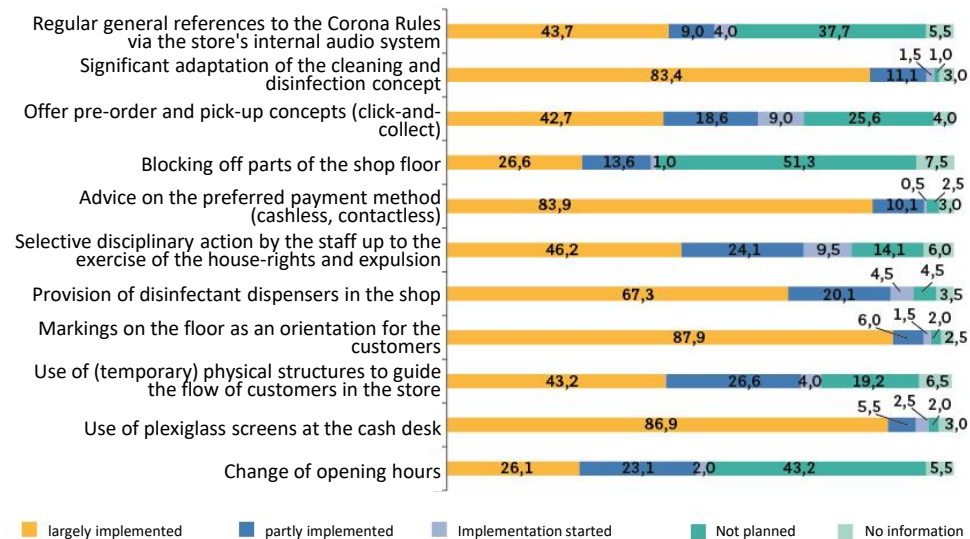
Throughput is the new Dwell Time

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Keeping Customers and Staff Safe

Please indicate what measures your company takes to make shopping in the store safer

In percent

Measure	largely implemented	partly implemented	Implementation started	Not planned	No information
Regular general references to the Corona Rules via the store's internal audio system	43,7	9,0	4,0	37,7	5,5
Significant adaptation of the cleaning and disinfection concept	83,4	11,1		1,5 / 1,0 / 3,0	
Offer pre-order and pick-up concepts (click-and-collect)	42,7	18,6	9,0	25,6	4,0
Blocking off parts of the shop floor	26,6	13,6	1,0	51,3	7,5
Advice on the preferred payment method (cashless, contactless)	83,9	10,1	0,5 / 2,5	3,0	
Selective disciplinary action by the staff up to the exercise of the house-rights and expulsion	46,2	24,1	9,5	14,1	6,0
Provision of disinfectant dispensers in the shop	67,3	20,1	4,5 / 4,5	3,5	
Markings on the floor as an orientation for the customers	87,9	6,0	1,5 / 2,0	2,5	
Use of (temporary) physical structures to guide the flow of customers in the store	43,2	26,6	4,0	19,2	6,5
Use of plexiglass screens at the cash desk	86,9	5,5	2,5 / 2,0	3,0	
Change of opening hours	26,1	23,1	2,0	43,2	5,5

Legend: largely implemented · partly implemented · Implementation started · Not planned · No information

n = 199, Mehrfachnennungen möglich
Abweichungen zu 100 % rundungsbedingt

Quelle: EHI Retail Institute

EHI handelsdaten.de EHI Retail Institute®

- Cleaning, contactless payments, floor markers, and sneeze shields as first, quick actions

- Implementation of disinfection dispensers, disciplinary measures, click-and-collect, and store layout changes take longer, but will be implemented by most stores

- Fewer retailers plan to change opening hours, to block off parts of the store, or to use the audio systems

- Overall, consistent picture with store checks

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# First steps towards the New Normal

Site Inspection
- Very quiet (approx. 40% of usual traffic)
- Everyone is wearing face masks
- Only a few lines (exception: extremely long lines in front of consumer electronics and sneaker shops, shorter lines in front of fast fashion)
- Visible luxury brand shopping bags (experience vs. online, high net worth individuals want to treat themselves)
- Global retail outlets partly closed (Apple, C&A, H&M, TKmaxx)
- Cleaning crews omnipresent

Access Control (two days after opening)
- Very pragmatic approach
- Counting manually (app)
- Limiting with … carts, hangers and, most popular, plastic price labels

Digital is not yet used
- Existing screens and people counters are not yet used for access control
- Exception local fashion retailers and restaurant (moved existing screen to the shop window for pick-up)
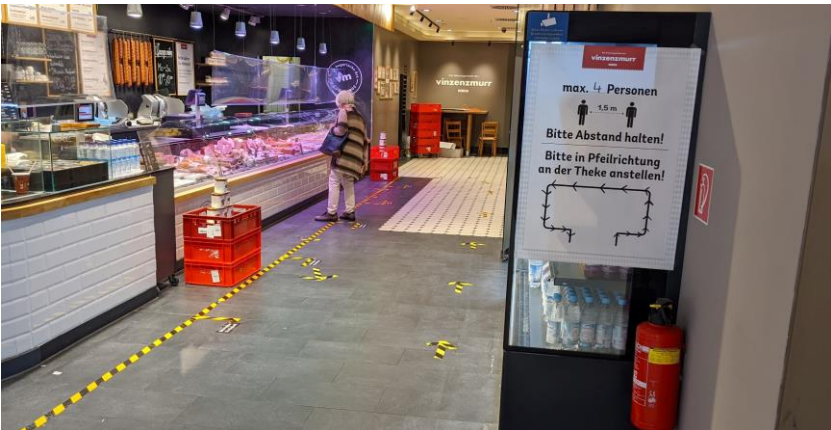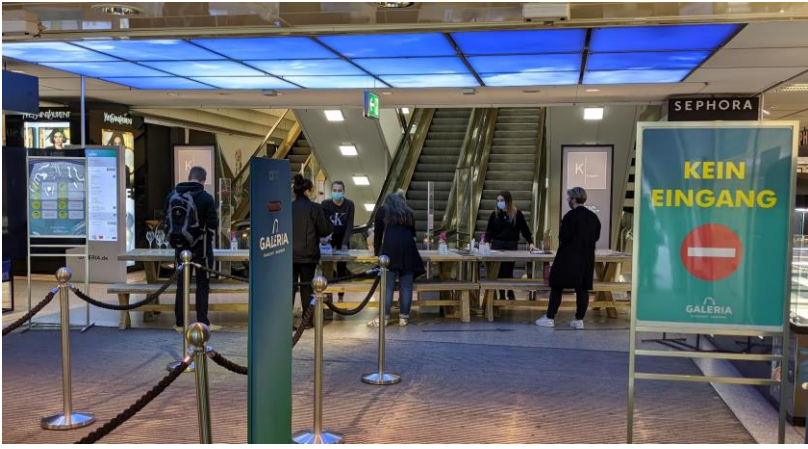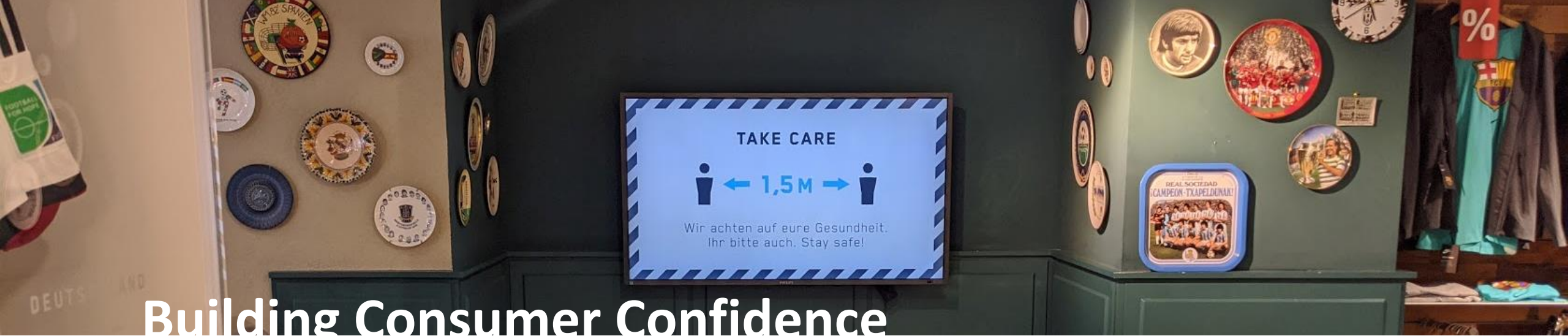
Building Consumer Confidence

- Consumers are feeling
  - denial,
  - anxiety,
  - dread and
  - hope.

- But even if they aren't in the buying mood, brands
  can use this time to **build deeper relationships**

Communicating the New Normal

Mandatory Communication -> compliance
- Mainly regulatory e.g. number of shoppers allowed, mask regulations, sanitation rules
  (pay contactless, avoid touching merchandise, wear mask, disinfect hands)

Feel good Communication -> buying mood
- We care about you
- Don't worry, we take care of your health and wear protective masks, keep the safety distance and implement the hygiene regulations. You too, please!
- Keep calm, wear your mask and buy sneakers
- Don't worry, we are wearing masks and disinfect all surfaces regularly

Emotional Communication -> consumer-brand relation
- Welcome Back
- Great to See you again
- We've missed you
- Buy local, save jobs

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Touchscreens - User in Focus

- Consumer feel uncomfortable using public touchscreens
- Providing disinfection is essential, but not sufficient
- Residues of disinfection fluid on the screen irritate users
- Moving GUI
- Post cleaning schedule / sign-off

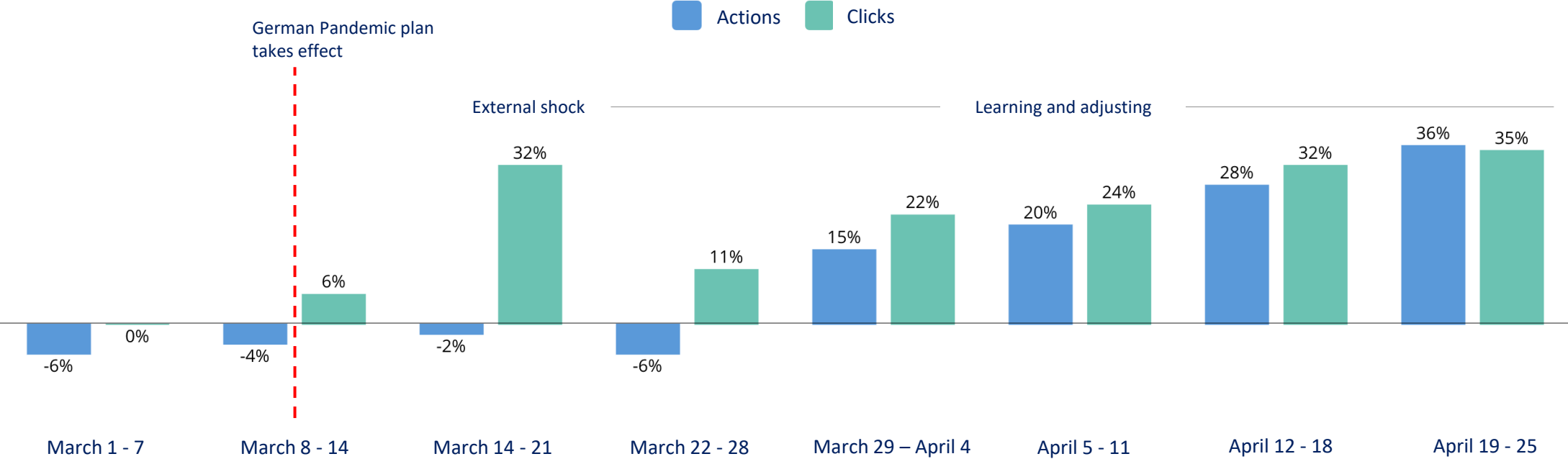- AVIXA Webinars | Digital Signage Power Hour
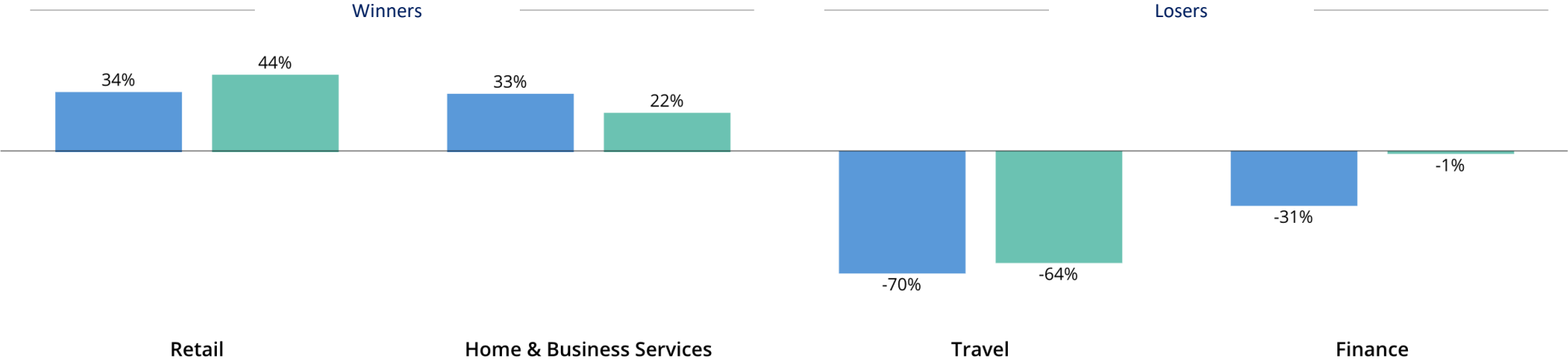
https://youtu.be/6MGQV5lGbYU

Segment – YoY

This chart is showing actions and clicks by segment
for March – end of April this year vs. last year

Actions and Clicks / CJ Global Performance / March 1 – April 25

YoY development in %

■ Actions   ■ Clicks

Winners   Losers

34%	44%		
33%	22%		
		-70%	-31%
		-64%	-1%

Retail   Home & Business Services   Travel   Finance
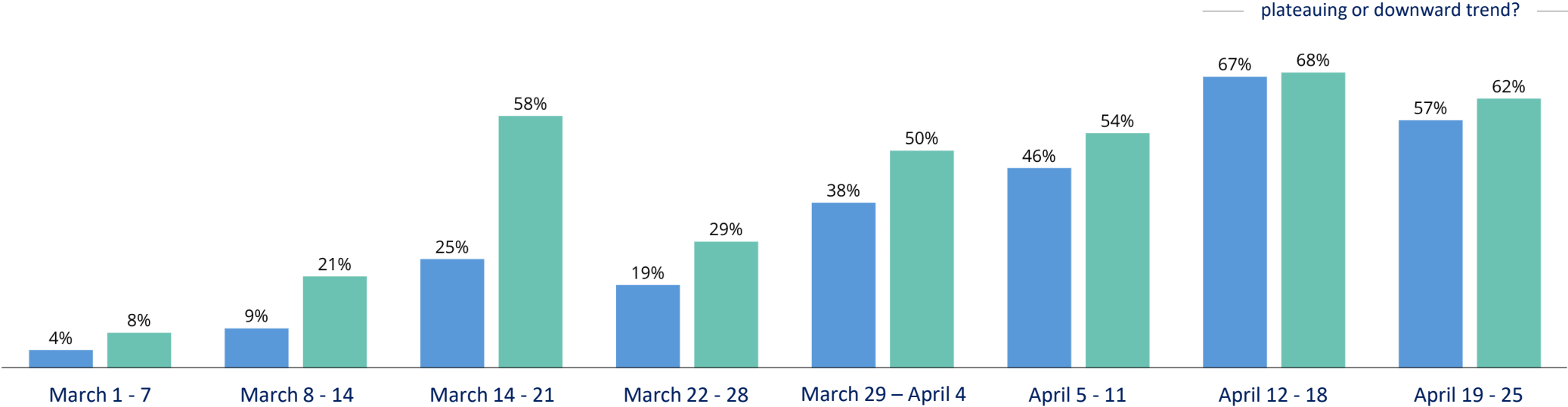
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Segment by Week – YoY

This chart is showing actions and clicks by segment by week
for March – end of April this year vs. last year

Actions and Clicks / Weekly Performance by Segment / March 1 – April 25

YoY development in %

■ Retail Actions   ■ Retail Clicks

plateauing or downward trend?

|	March 1 - 7	March 8 - 14	March 14 - 21	March 22 - 28	March 29 – April 4	April 5 - 11	April 12 - 18	April 19 - 25
Retail Actions	4%	9%	25%	19%	38%	46%	67%	57%
Retail Clicks	8%	21%	58%	29%	50%	54%	68%	62%

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Segment drill-down – YoY

March 27 – end of April 25 this year vs. last year

Key take-aways

- Both Travel and Ticketing for live events have plummeted and the impact is visible online and offline. A quick recovery is unlikely.

- Financial services has seen a significant drop overall but showing a slight recovery in CW 17. The reduction in branches will continue, digital signage per branch is expected to increase

- Strong consumer demand in digital Education will translate into public sector and presents an opportunity for digital signage industry

- The increased consumer demand in Computer & Electronics may move (back) to offline Retail with the re-opening due to backlog of orders online

- Beauty with lots of browsing – are purchases delayed for re-opening of high-street shops?
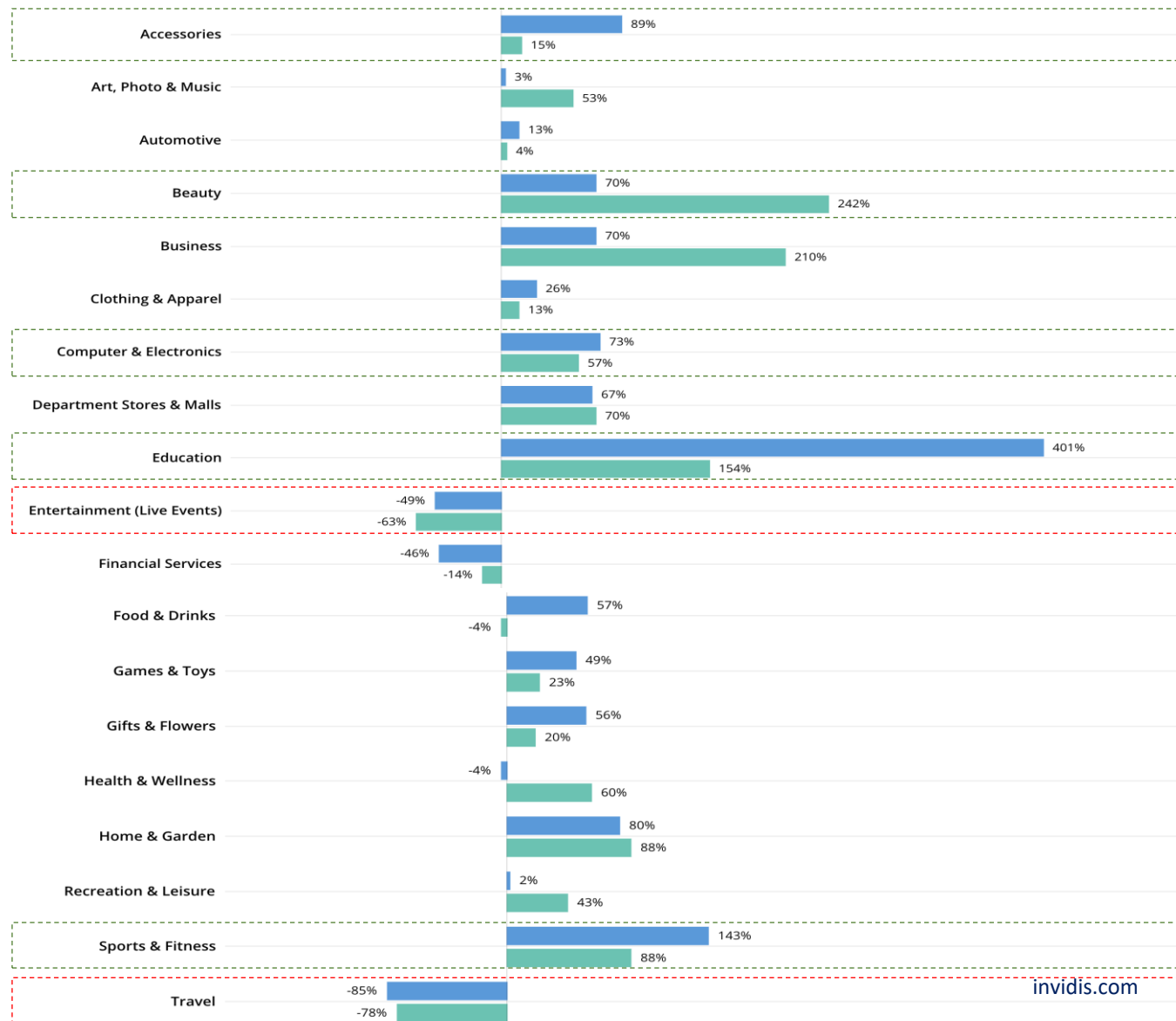
What are your experiences?
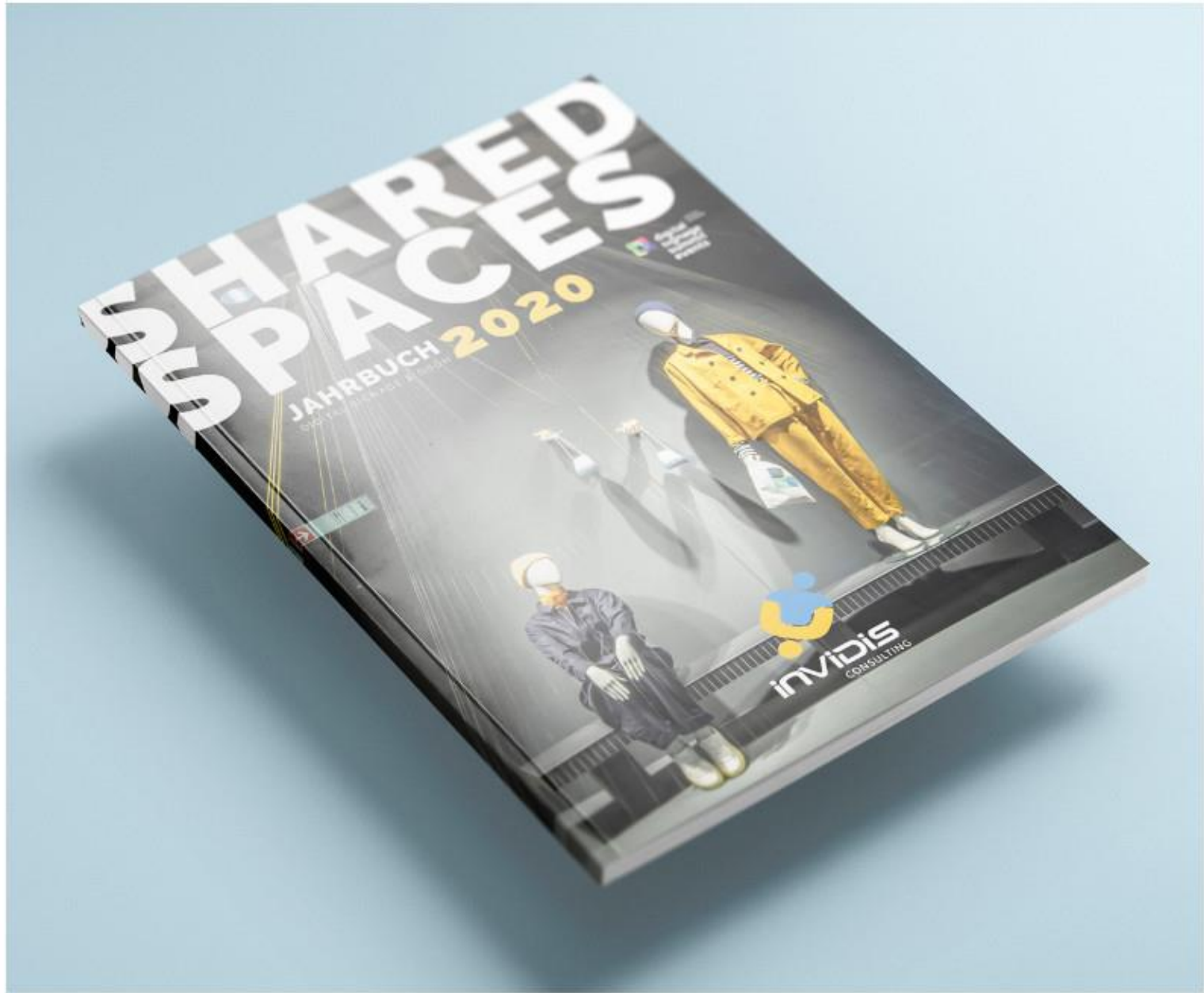
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