



invidis happy hour #8

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09 | 10 June 2020

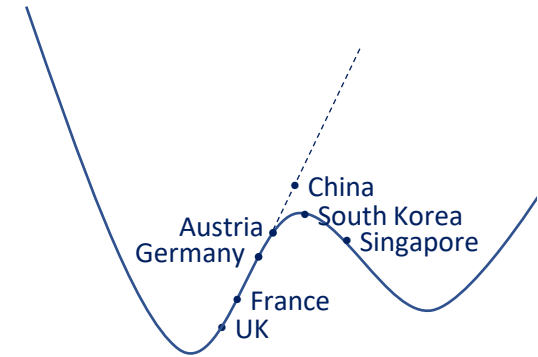
- **Status Quo**
- **Outlook**
- **Digital & Touchless Travel**



Threat of a Second Wave

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- Neither Asia nor Europe have reached the Post-Corona age yet
- Threat of second wave in fall/winter
- Currently relaxed regulations could be tightened again anytime
- Shift from access control to flow management
- Face masks, physical distance and fresh air in focus
- **Preparations and measurements necessary for pandemic setbacks or worst cast second wave**





Retail

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Liquidity

- Only 20-40% of retail rents paid in Q2/2020 across Europe

Retail/Leisure

- 2020 revenue forecasted to be between 40-70% of 2019 revenues

Travel / Transport / Hospitality

- 2020 revenue forecasted to reach max 50% vs 2019

(Source: Bloomberg)



Office

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- Reduced Capacity (currently limited to 30% occupancy, soon 50-70%)
- Flexibility is king / no experience with new regulations
- Biggest challenge: fresh air (aerosols), hygiene standards and meeting facilities

- Zoom fatigue





DB

**Sicher reisen.
Gemeinsam geht das.**

bahn.de/sicherreisen

STROER

DB

Wir

tun alles, damit Du im ICE/IC
sicher reisen kannst.

Wir tragen Masken,
um Euch zu schützen.

Wir machen noch viel mehr.
Auch an unseren Bahnhöfen.

bahn.de/sicherreisen

STROER

DB

Du

achtest auf Dich
und andere.

bahn.de/sicherreisen

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Revival of physical experiences

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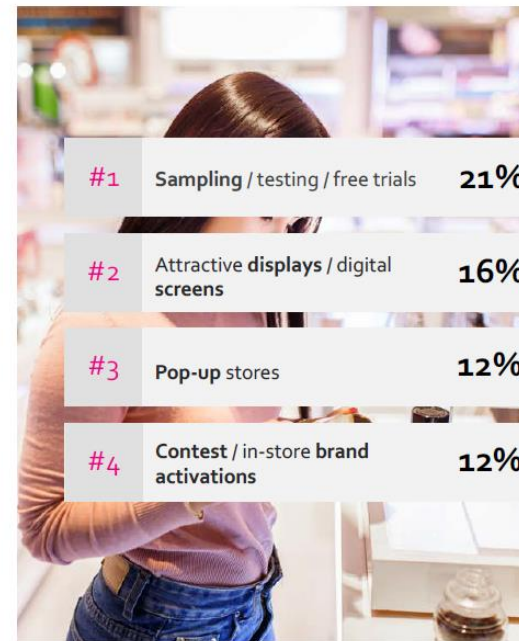
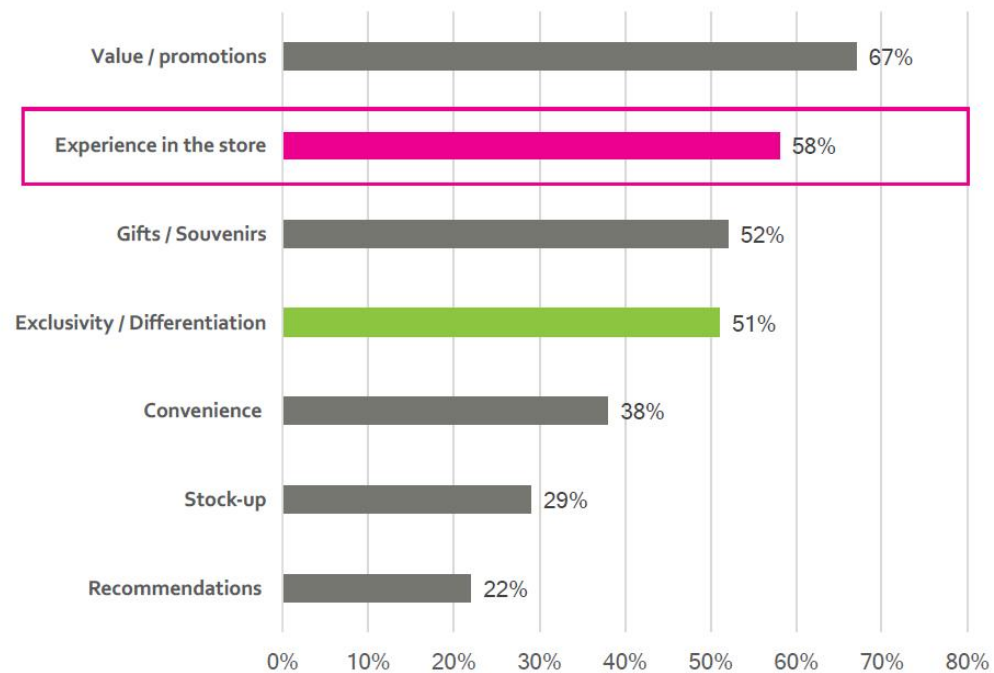
m1nd-set travel retail study “CX: Attitudes & Expectations Pre and Post Covid-19” (June 2020)

- Importance of experiential retail in engaging with customers
- In-store experience will become a „must-have“ in order to compete against other channels, especially online which has gained relevance since Covid-19 outbreak
- Consumer concerns and fears with the Covid-19 pandemic will make technology, digitalization and XR innovations become the way forward to attract and engage for retailers.



Role of experiential retail in driving purchases

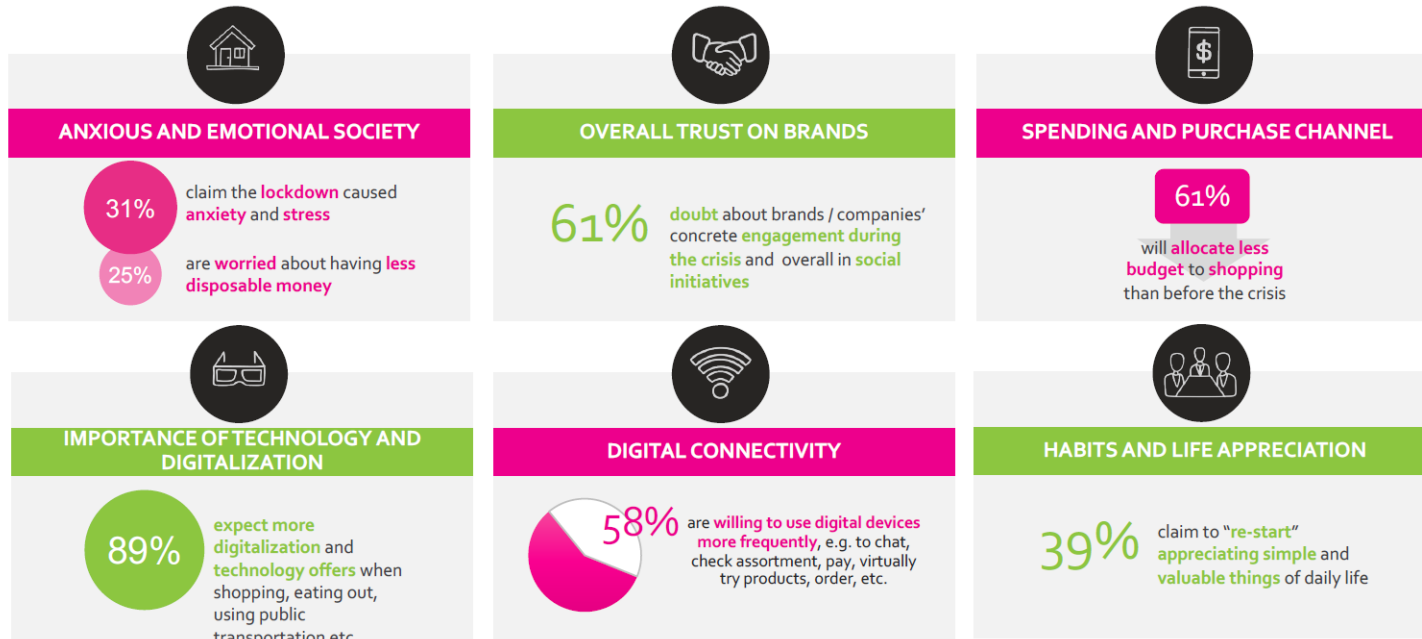
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Source: m1nd-set travel retail study "CX: Attitudes & Expectations Pre and Post Covid-19" (June 2020)

How Covid-19 has changed consumers

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Source: m1nd-set travel retail study "CX: Attitudes & Expectations Pre and Post Covid-19" (June 2020)



How Covid-19 has changed consumers (2)

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62% of consumers will refrain from being in proximity with retail staff

51% of consumers will refrain from unnecessarily touching products

45% of consumers will refrain from testing / trying products

Source: m1nd-set travel retail study "CX: Attitudes & Expectations Pre and Post Covid-19" (June 2020)



Most-wanted digital tools

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84%

of consumers want an **app** and **QR code** on smartphone to find out more about a product / brand and for final payment

78%

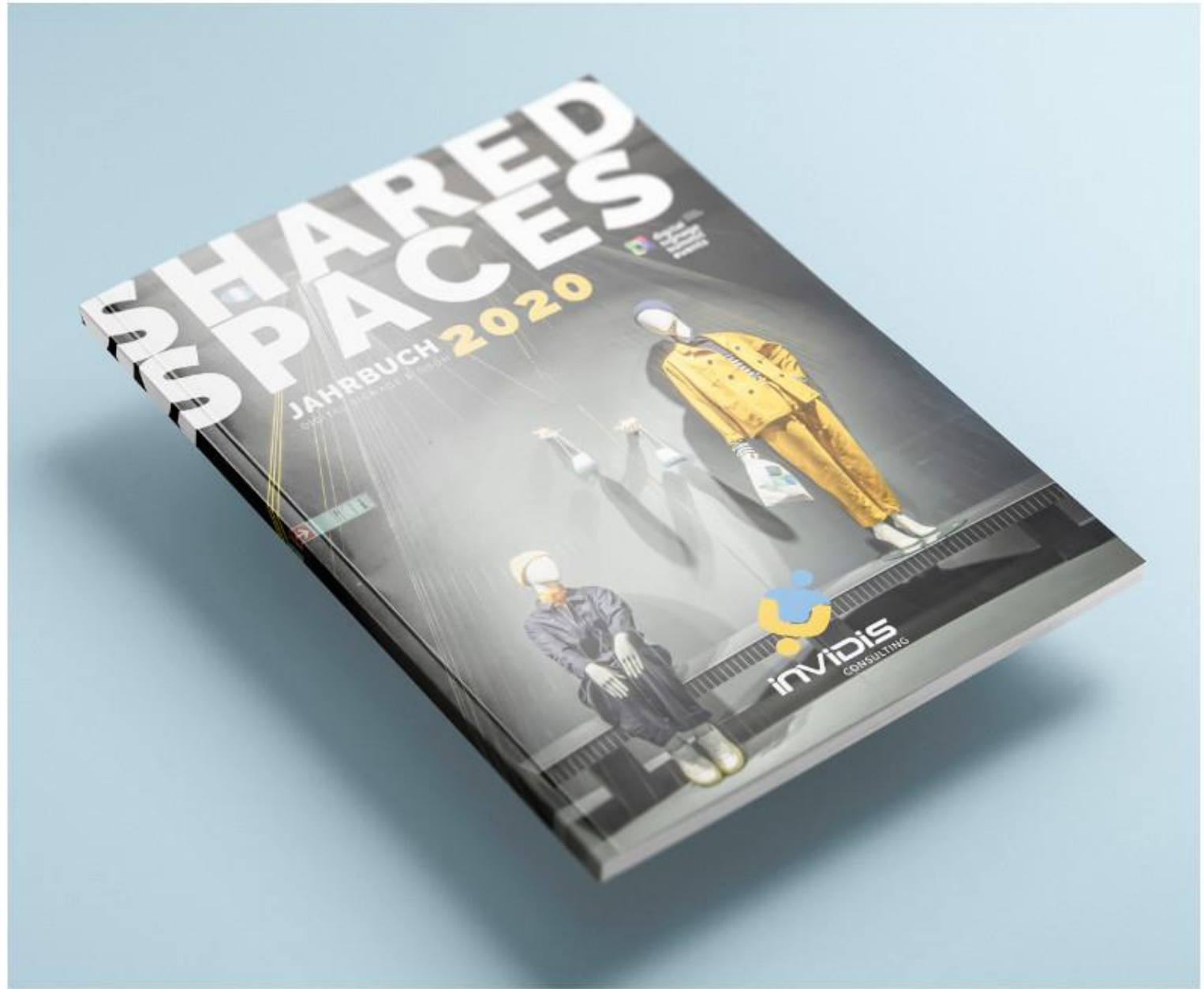
of consumers want **digital screens** displaying ongoing content about brand/product's history, origin, ingredients, usage, etc.

65%

of consumers want **guided selling displays** offering personalized recommendation and advice after answering a few profiling questions

Source: m1nd-set travel retail study "CX: Attitudes & Expectations Pre and Post Covid-19" (June 2020)







contacts

Florian Rotberg
Florian.Rotberg@invidis.com
+49 89 200041611
+49 160 97364533

Stefan Schieker
Stefan.Schieker@invidis.com
+49 89 200041690
+49 151 12151617

invidis consulting GmbH
Grillparzerstr. 12a
81675 Munich | Germany

[invidis.com](https://www.invidis.com)

