

# ROLLER COASTER RETAIL

Inspiring retailers during the ups & downs




INDIA






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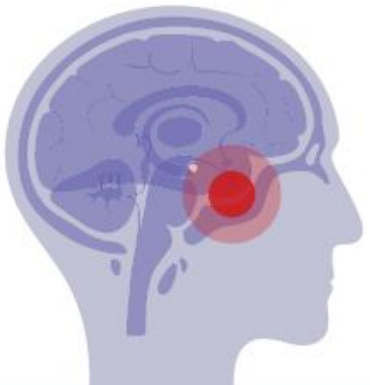


NCCc1ccc(O)c(O)c1

**DOPAMINE**

NCCc1c[nH]c2cc(O)ccc12

**SEROTONIN**



**AMYGDALA HIJACK**



**IRRATIONAL BEHAVIOUR**



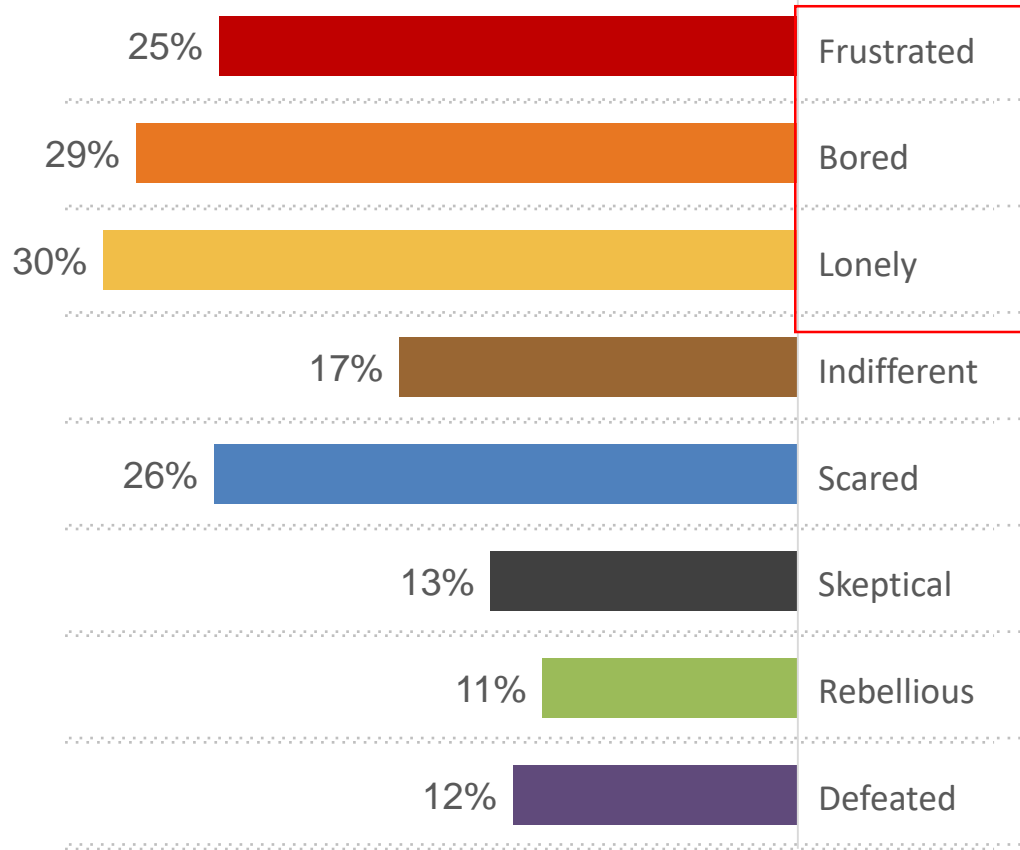
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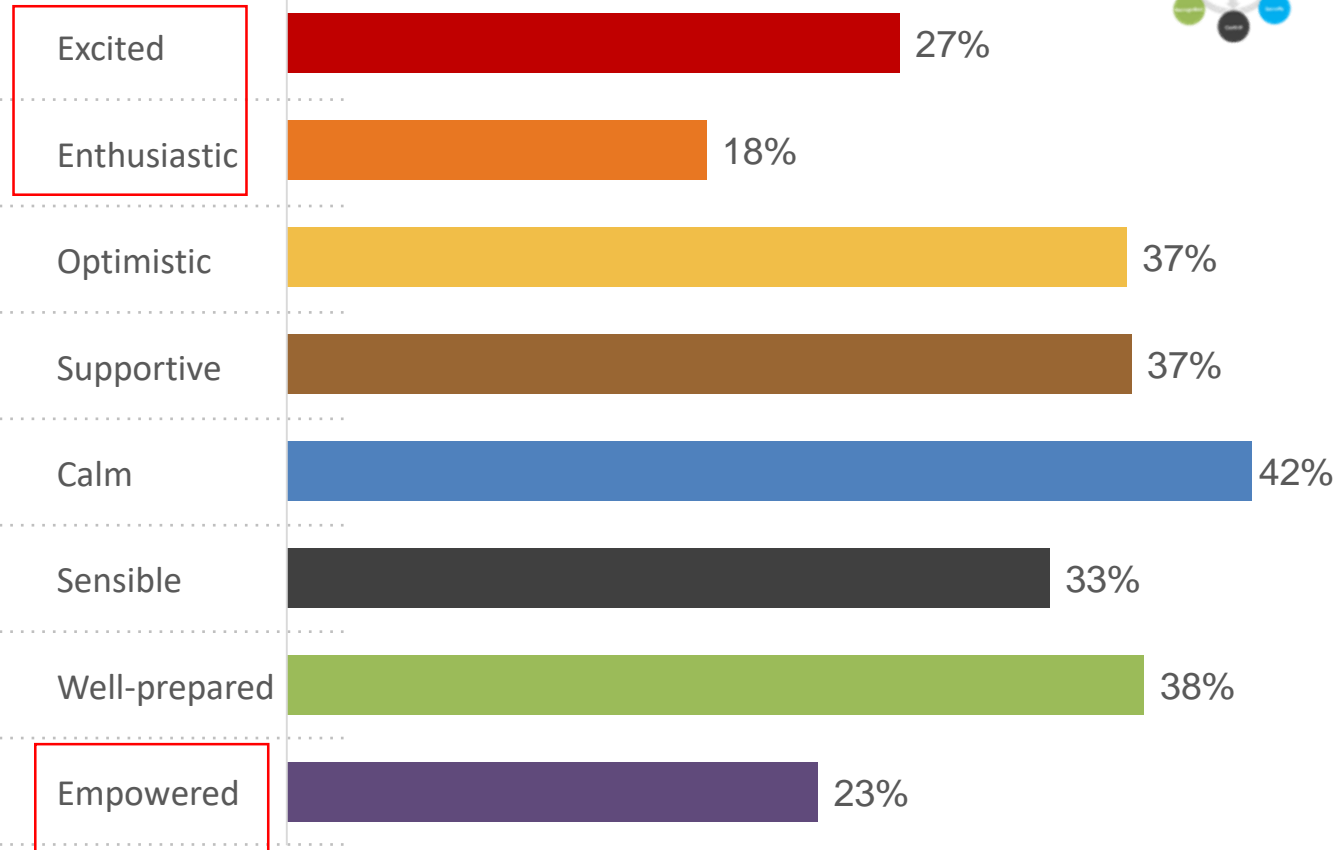
# Lack of Agency...



## Negative



## Positive



Country: IN | Wave Selection: Wave 38 - April 11 Base: 1001



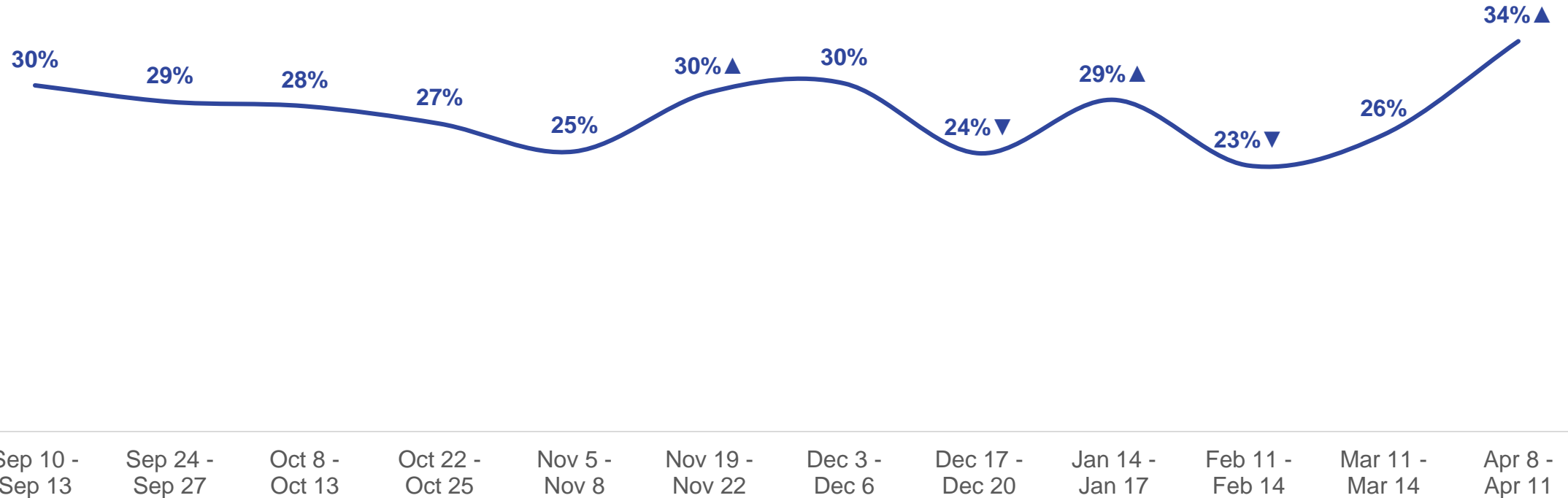
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# Sense for future is bleak..



## Return to Normal in One Year or More (Including "Never / Don't Know")



Country: IN | Wave Selection: Wave 39 - April 25 Base: 1000



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# Not comfortable stepping out...



## Perceived Risk of Various Activities



Country: IN | Wave Selection: Wave 38 - April 11 Base: 818

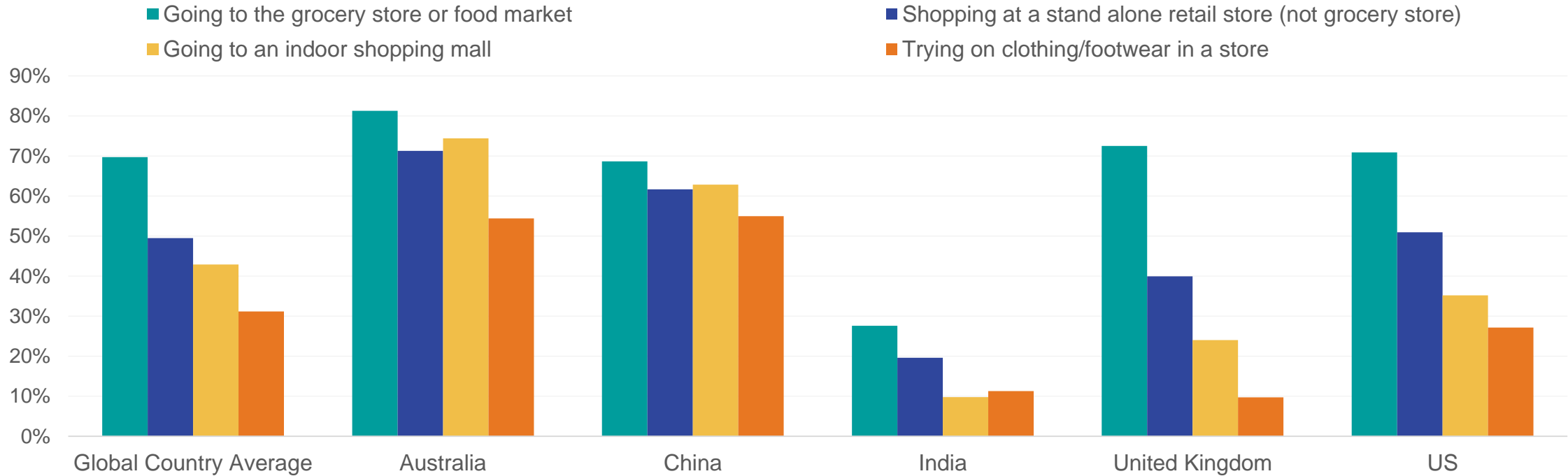


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# Participation in retail activities much below the average

## Already Participating in Retail



Country: IN | Wave Selection: Wave 39 - April 25

Base: Global Country Average:14507, AU:1001, CN:1001, IN:1001, UK:1000, US:1000



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# WHAT IT FEELS LIKE TO BE IN RETAIL TODAY

**Forced operational changes  
across all sectors**

**Tipping point  
for eCommerce**

**Increased frugality  
further pressuring margins**

**Dramatic shift to new  
digital payment platforms**

**Accelerated decline of already  
fragile retailers**

**Need to reinvent  
at every turn**



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# Staying on track in 'No Normal'

## DIGITAL

## PHYSICAL



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THANK YOU

**ACCEPT AND EMBRACE  
THE ROLLER COASTER RIDE**



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