

Shifts in the Low Touch Economy

Welcome! While we wait for others...

Say hello in the chat: Name, Location, and tell us an unexpected change you've noticed caused by Covid-19.

Remember to select "Panelists and everyone" in the chat box



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Business
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Your hosts for today



CEO, Founding Partner



Founding Partner

We are a strategy & business design firm. At Board of Innovation we partner with the world's largest organizations to navigate fundamental shifts. We start from your assets & core strengths to find new growth.

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innovation**

Our life time mission

Inspire 100M people to innovate for a better tomorrow

What we do

Shaping non-obvious strategies and building new business with Fortune 500 companies.

What's in store for the next 45-minutes?

01 Intro to the Low Touch Economy

02 Unpacking short and long term impact

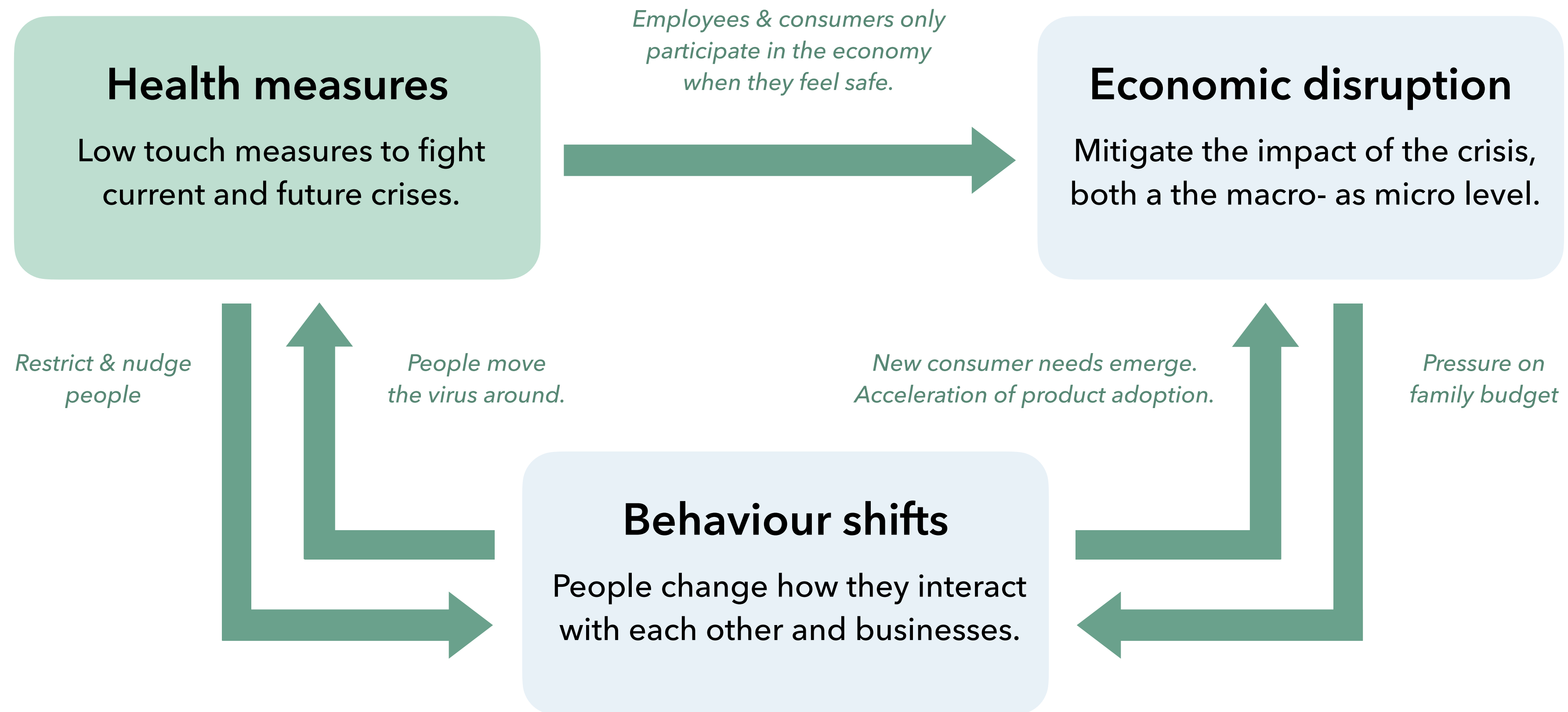
03 Creating actionable strategies for business

04 Q&A

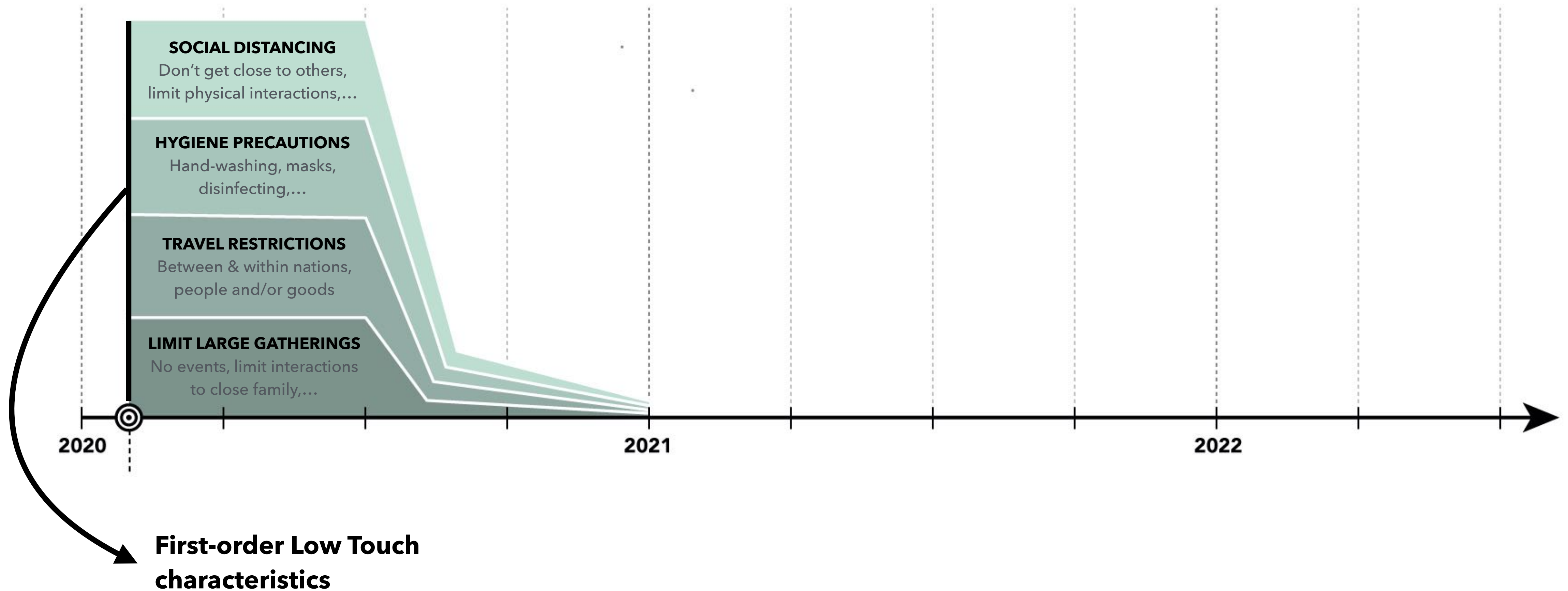


“Any viable exit strategy relies on building a new Low Touch Economy.”

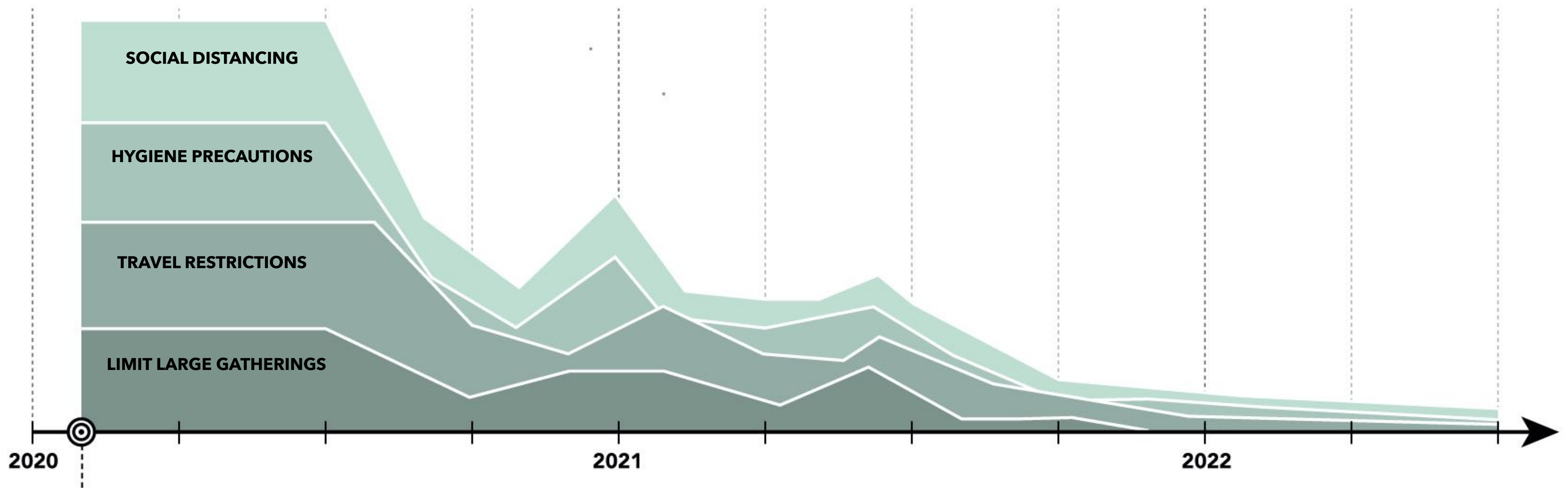
Low Touch Economy feedback loop



What some hope to see:



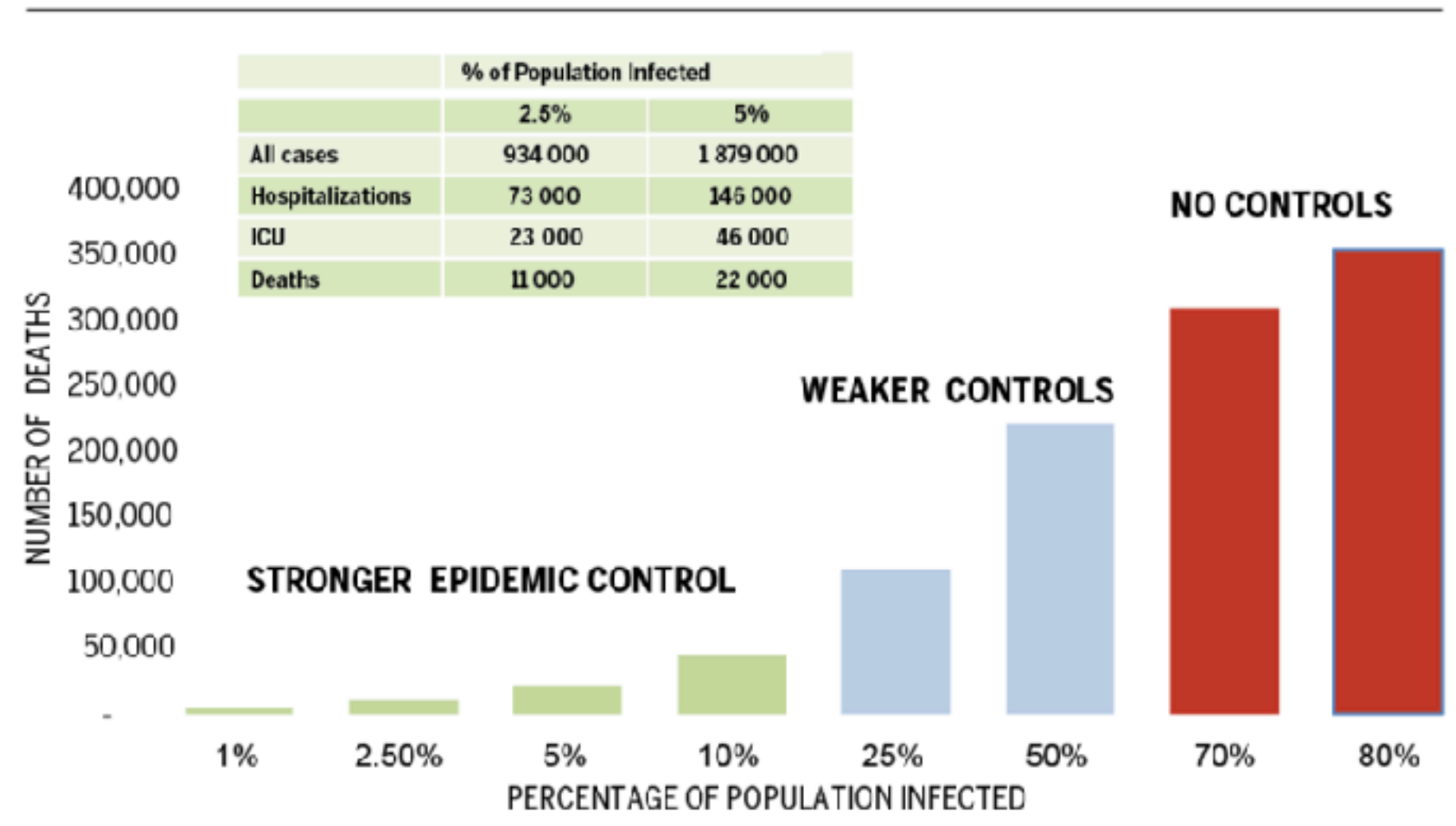
Our base case scenario: going back to a (new) normal will be a bumpier path



All the second order changes in how we live and work will sustain as well.

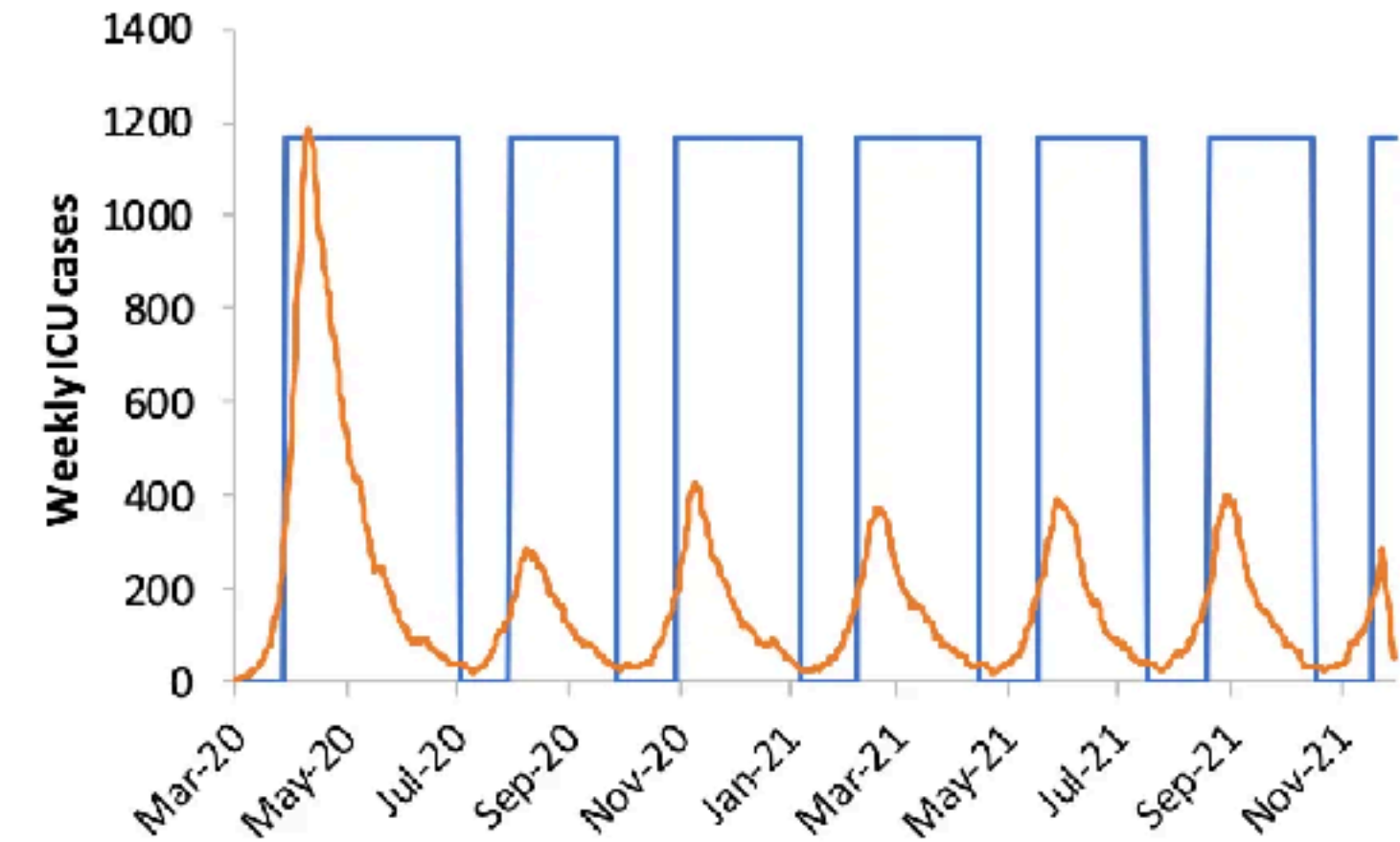
Why #1: Studies (like everything, very much in flux)

DIFFERENT SCENARIOS OVER THE COURSE OF PANDEMIC



SOURCE: PUBLIC TECHNICAL BRIEFING

NATIONAL POST



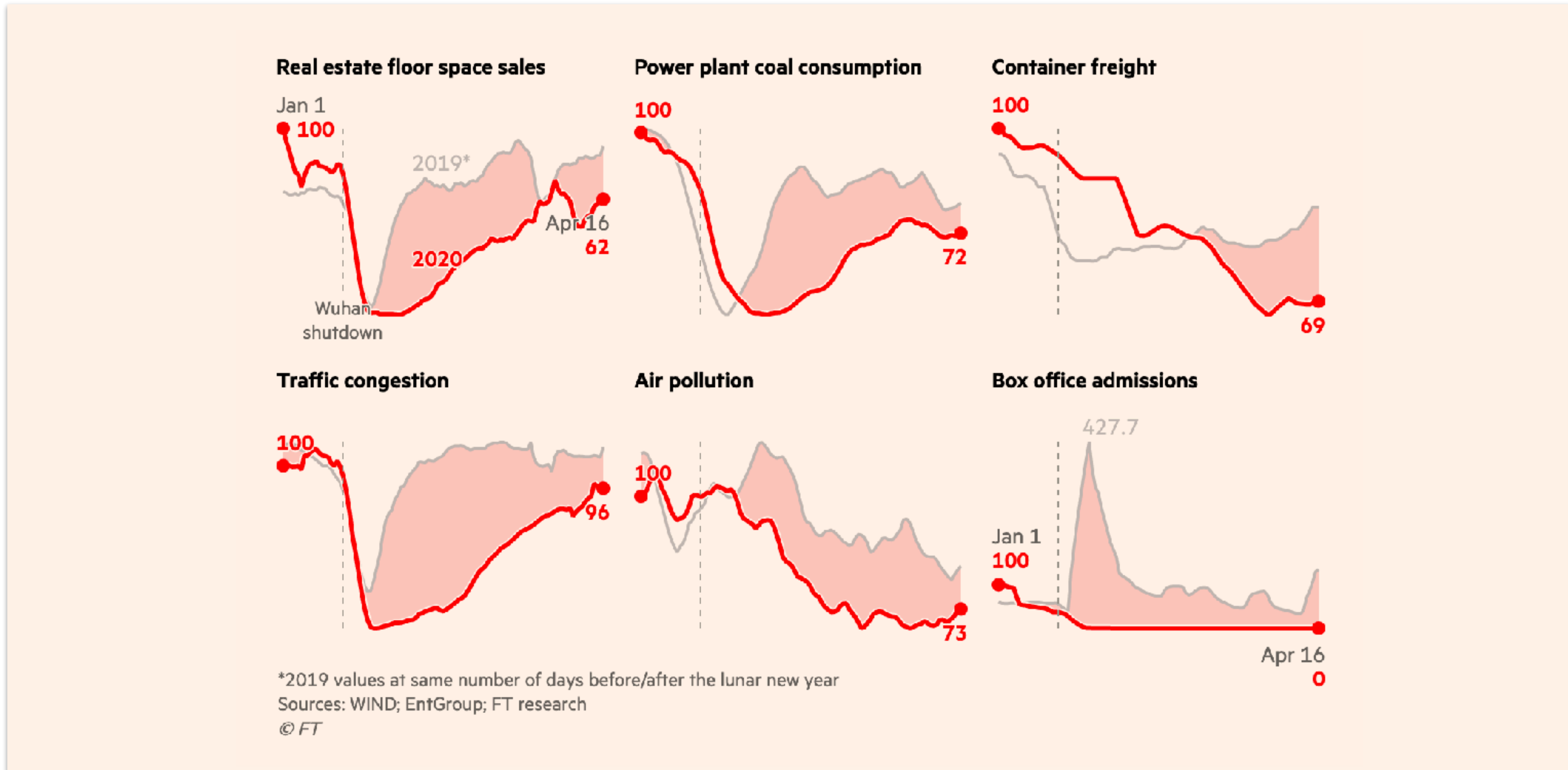
Source: Imperial College

Figure 4: Illustration of adaptive triggering of suppression strategies in GB, for $R_0=2.2$, a policy of all four interventions considered, an “on” trigger of 100 ICU cases in a week and an “off” trigger of 50 ICU cases. The policy is in force approximate 2/3 of the time. Only social distancing and school/university closure are

Trudeau: “Life won't return to normal until we have a vaccine — 12 to 18 months”

CDC Director: “for the next 24 months, you know, we're all in this together”

Why #2: China and others getting back to "normal"



It will be a process of trial & error.



So far, most regions didn't manage to recover easily.

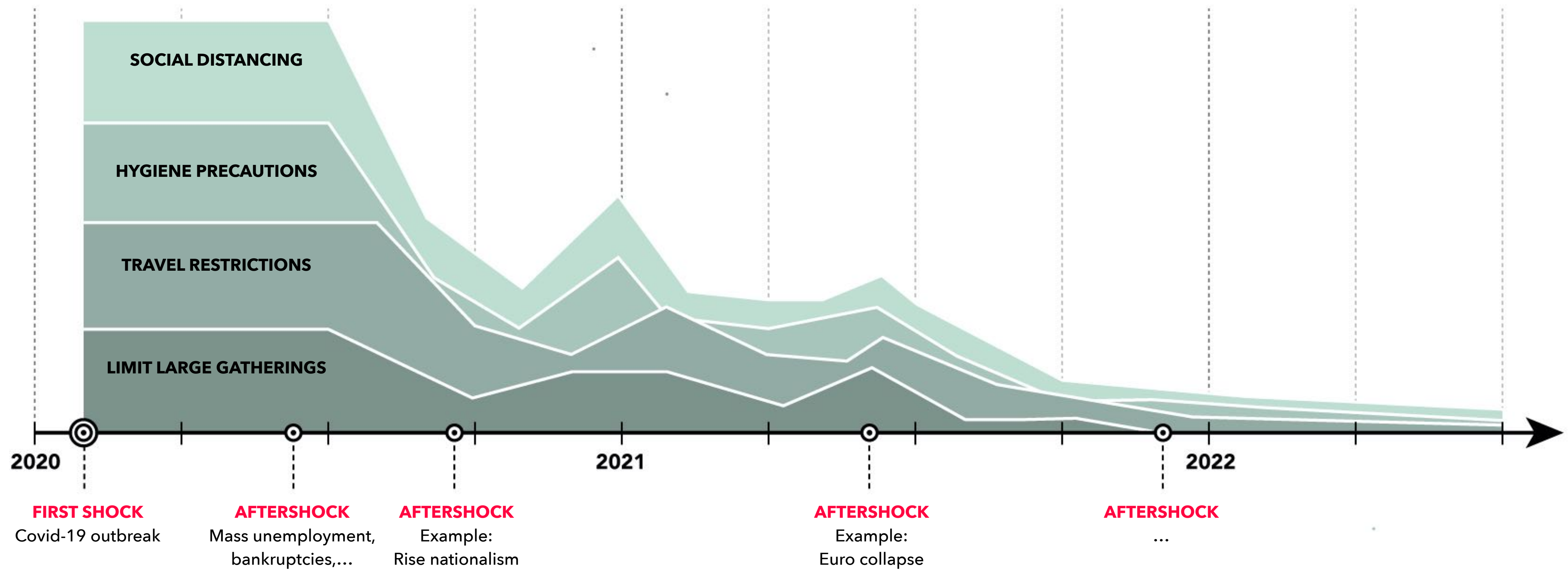
- Chinese cinemas told to close just a week after reopening.
- Singapore had to introduce a lockdown as well.



Big lockdown replaced by dozens of changes to daily life.

- Excessive cleaning operations
- Restricted apartment blocks
- Health and security checks everywhere

We should prepare for several years of aftershocks.



In the chat:

Which other aftershocks should we expect?

- 
- 01 Intro to the Low Touch Economy
 - 02 Unpacking short and long term impact
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Geopolitics

e.g. Protectionism

Macro-economics

e.g. Limited access to capital

Shifts are happening on many fronts

Human behavior

e.g. Immune certification

Webinar

Regulation

e.g. New privacy laws

Industry dynamics

e.g. Supply chain disruptions

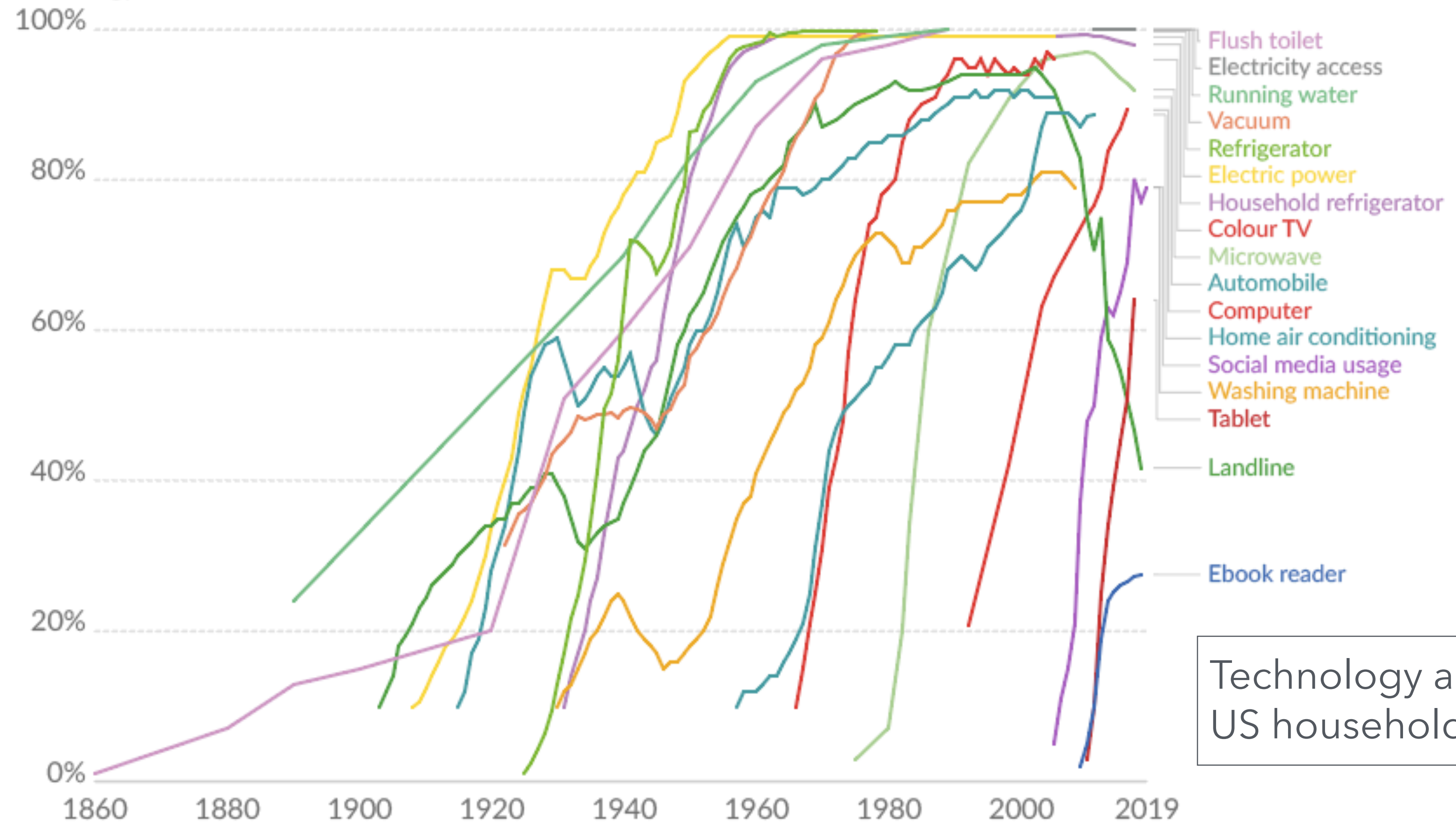
Technology

e.g. Contactless everything

The adoption curve of products is getting steeper (= faster)



Technology adoption rates, measured as the percentage of households in the United States using a particular technology.



Technology adoption
US households

Source: Comin and Hobijn (2004) and others

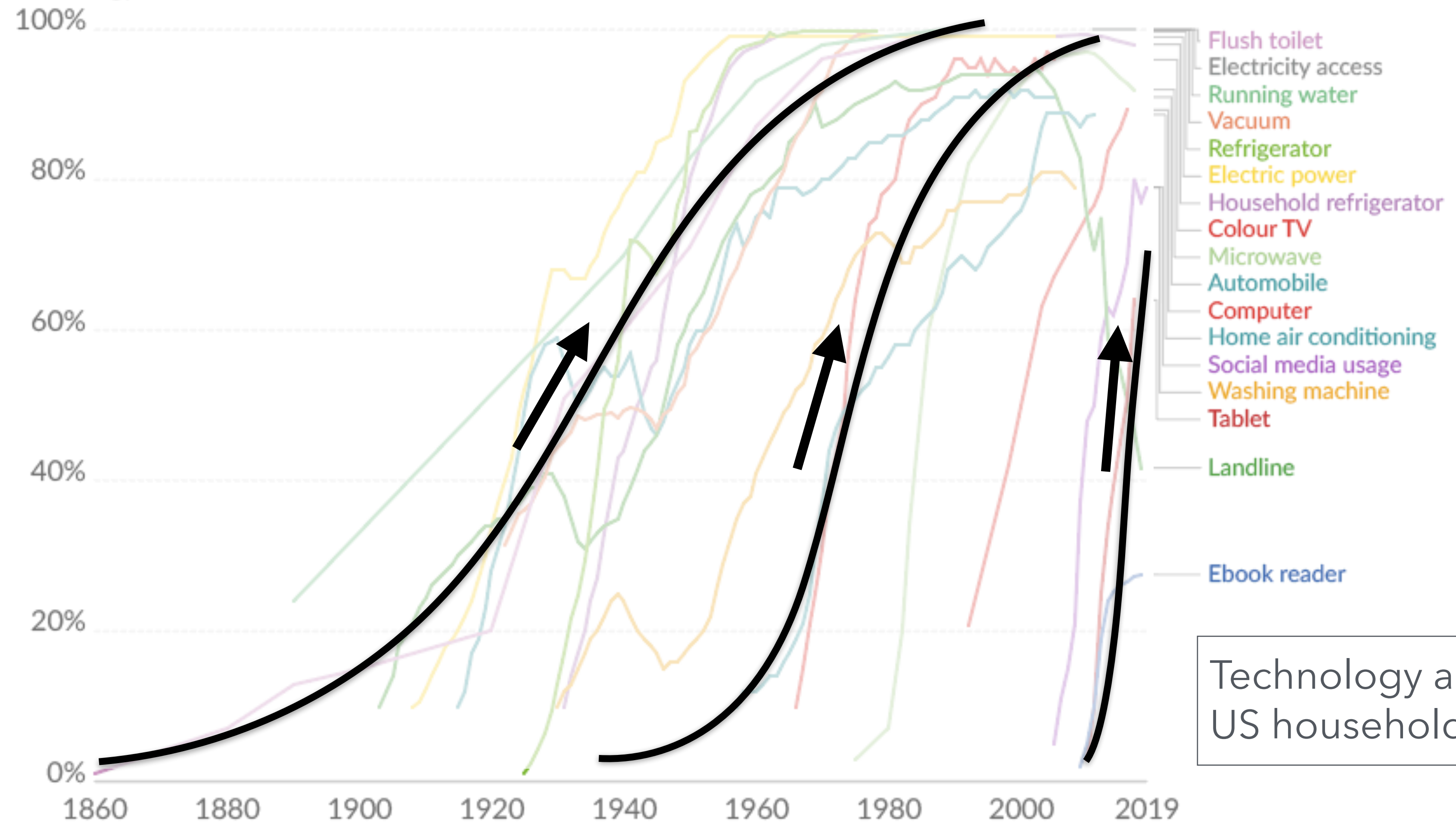
Note: See the sources tab for definitions of household adoption, or adoption rates, by technology type.

OurWorldInData.org/technology-adoption/ • CC BY

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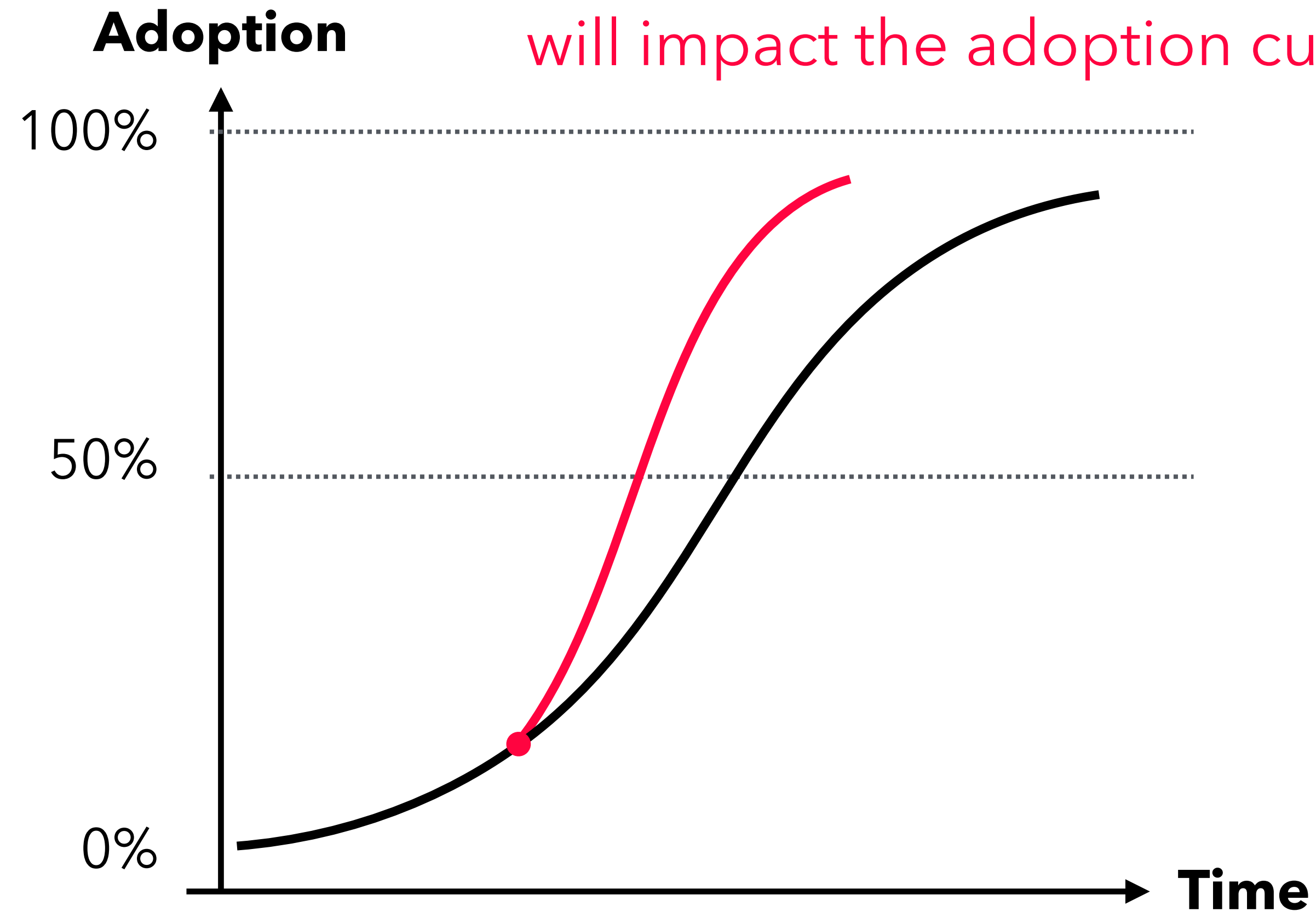
Source: Comin and Hobijn (2004) and others

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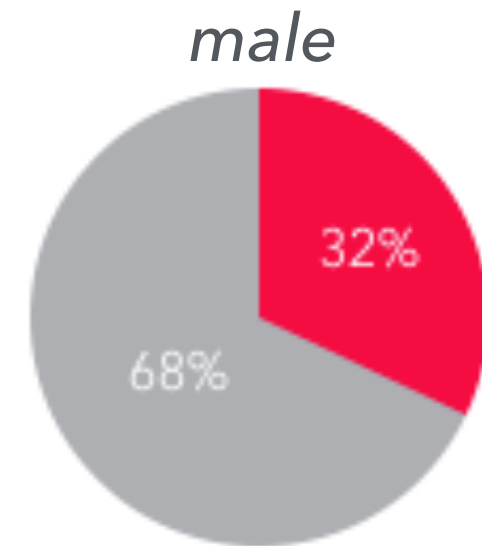
OurWorldInData.org/technology-adoption/ • CC BY

Due to this crisis, accelerated adoptions

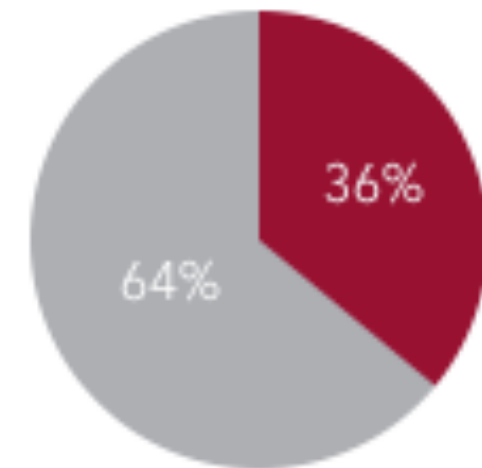
New habits and needs due to the Low Touch Economy will impact the adoption curve for some products



Due to this crisis, accelerated adoptions

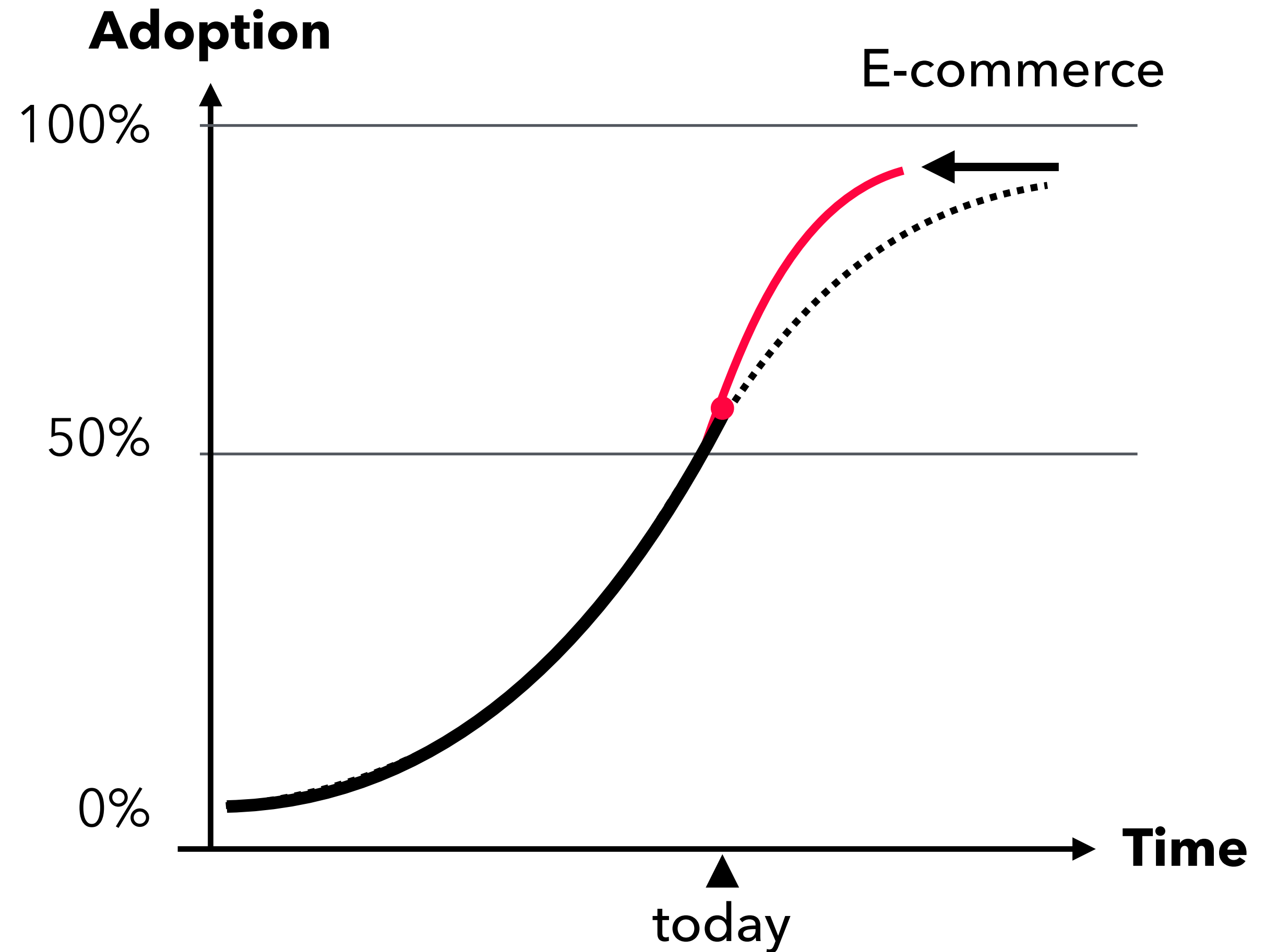


More 1/3 people never shopped online (US DATA)



During the pandemic 25% of these people now did.

source: statistica.com n=2200, March 24-26 2020



Due to this crisis, accelerated adoptions

BREAKING | 21,661 views | Apr 2, 2020, 05:33pm EDT

Coronavirus: 36% Of Americans Say Pandemic Has Made A 'Serious Impact' On Their Mental Health



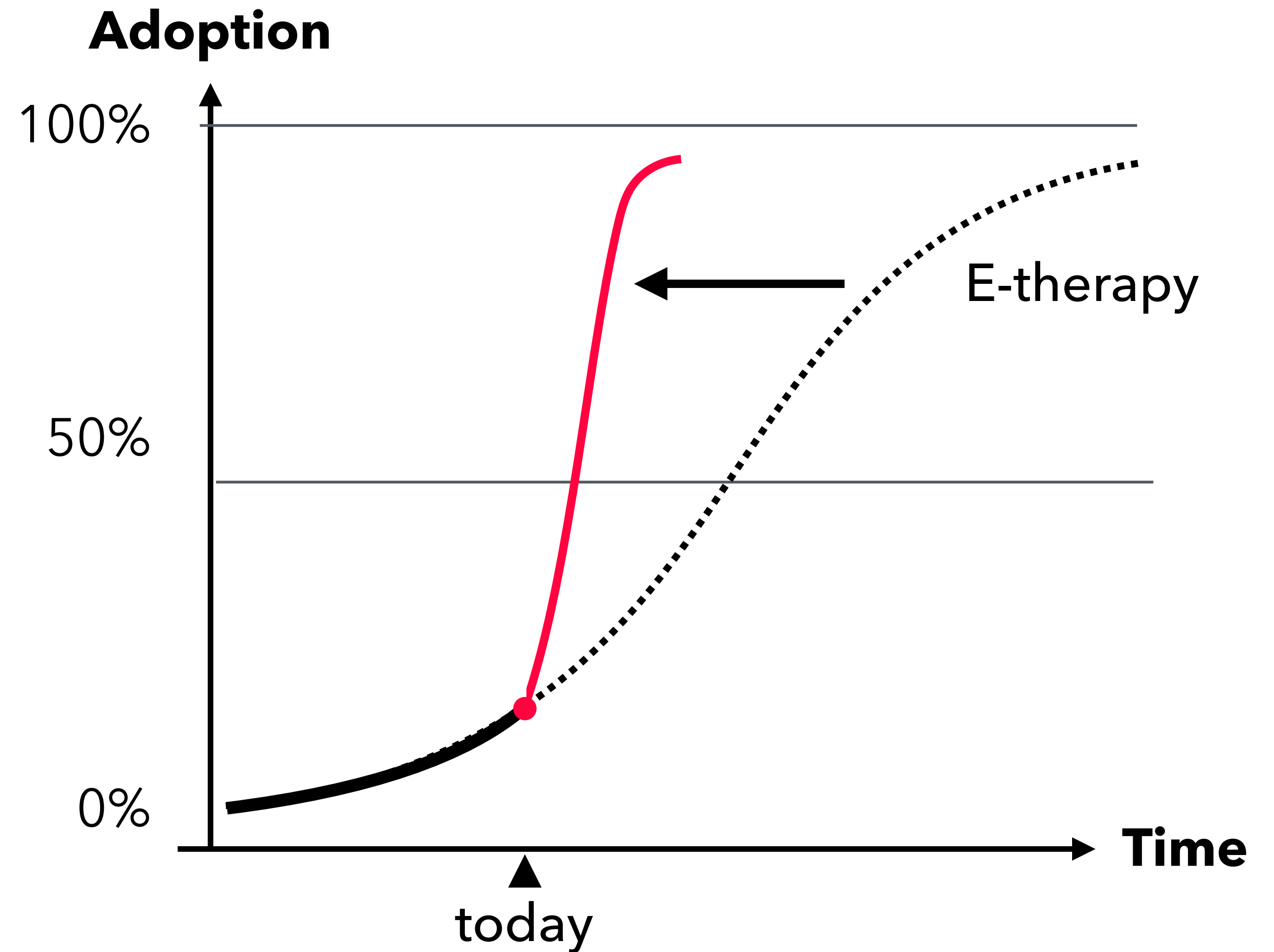
Carlie Porterfield Forbes Staff

Business

I cover breaking news.

- 36% of Americans told an [American Psychiatric Association](#) poll that the pandemic has had a serious impact on their mental health, and according to a [PiplSay poll](#), 31% of Americans say they're sleeping less because of coronavirus-related anxiety.
- As people self-quarantine, remote therapy services like [Talkspace](#) and [Brightside](#) have seen an increase in demand— Talkspace told Bloomberg it experienced a [65% increase](#) in customers since mid February and Brightside has seen a [50% increase](#) in new users since the start of the year.

source: Forbes.com Apr 2, 2020



Allowing new habits & ideas to launch

Politics

Spanish Government Aims to Roll Out Basic Income 'Soon'

By [Rodrigo Orihuela](#)

5 April 2020, 23:43 CEST

The Spanish government is working to roll out a universal basic income as soon as possible, as part of a battery of actions aimed at countering the impact of the coronavirus pandemic, according to Economy Minister Nadia Calvino.

Social Security Minister Jose Luis Escriva is coordinating the project and plans to put some sort of basic income "in place as soon as possible," with the main focus on assisting families, Calvino, who also serves as deputy prime minister, said in an interview Sunday night with Spanish broadcaster La Sexta.

But the government's broader ambition is that basic income becomes an instrument "that stays forever, that becomes a structural instrument, a permanent instrument," she said.

source: [Bloomberg.com](#) Apr 5, 2020

abc NEWS CORONAVIRUS GOVERNMENT RESPONSE

Fauci: 'In a perfect world' Americans would stop shaking hands

"We've got to break that custom," the infectious diseases expert said.

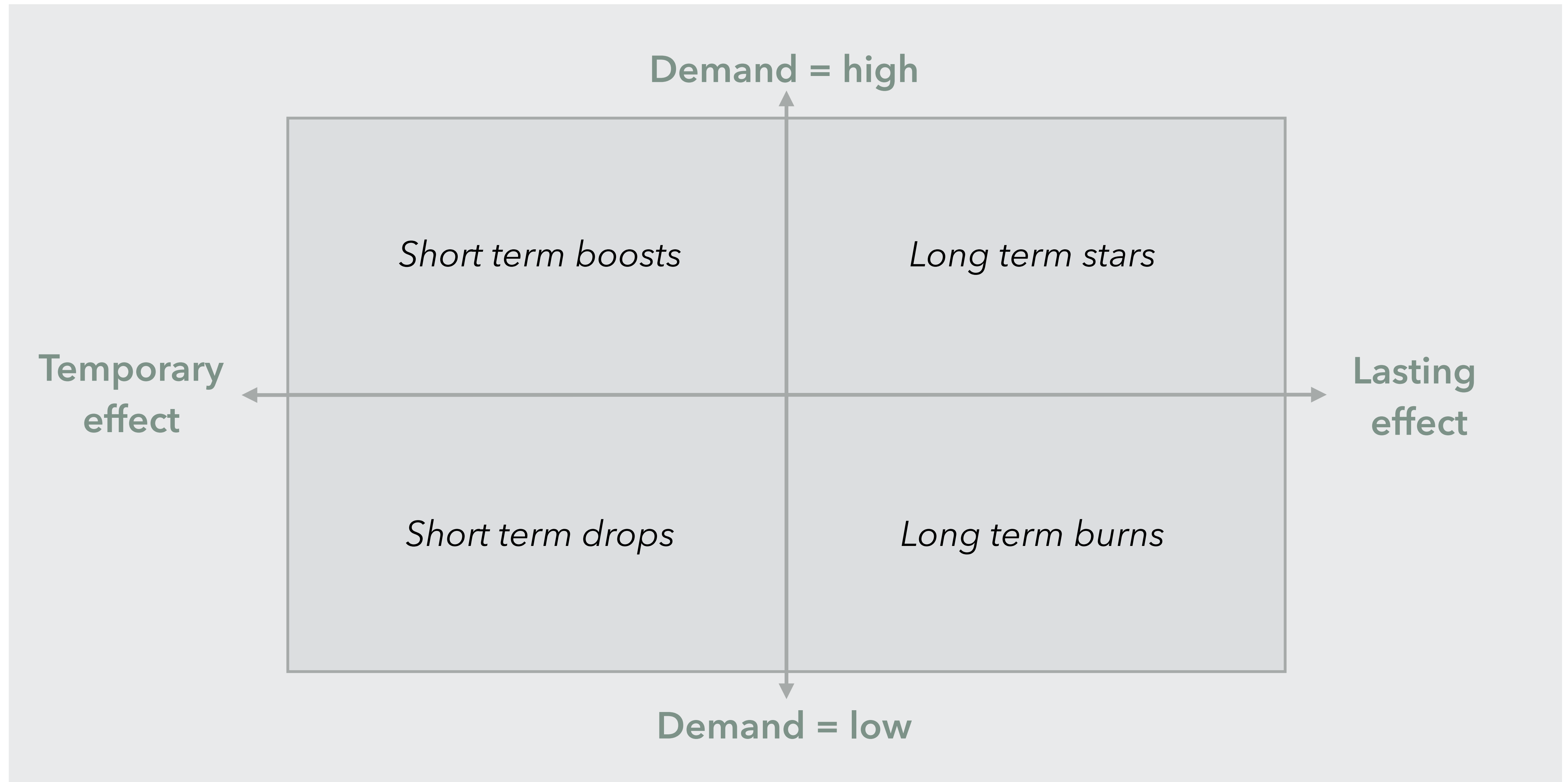
By [Libby Cathey](#)

9 April 2020, 19:59 • 8 min read

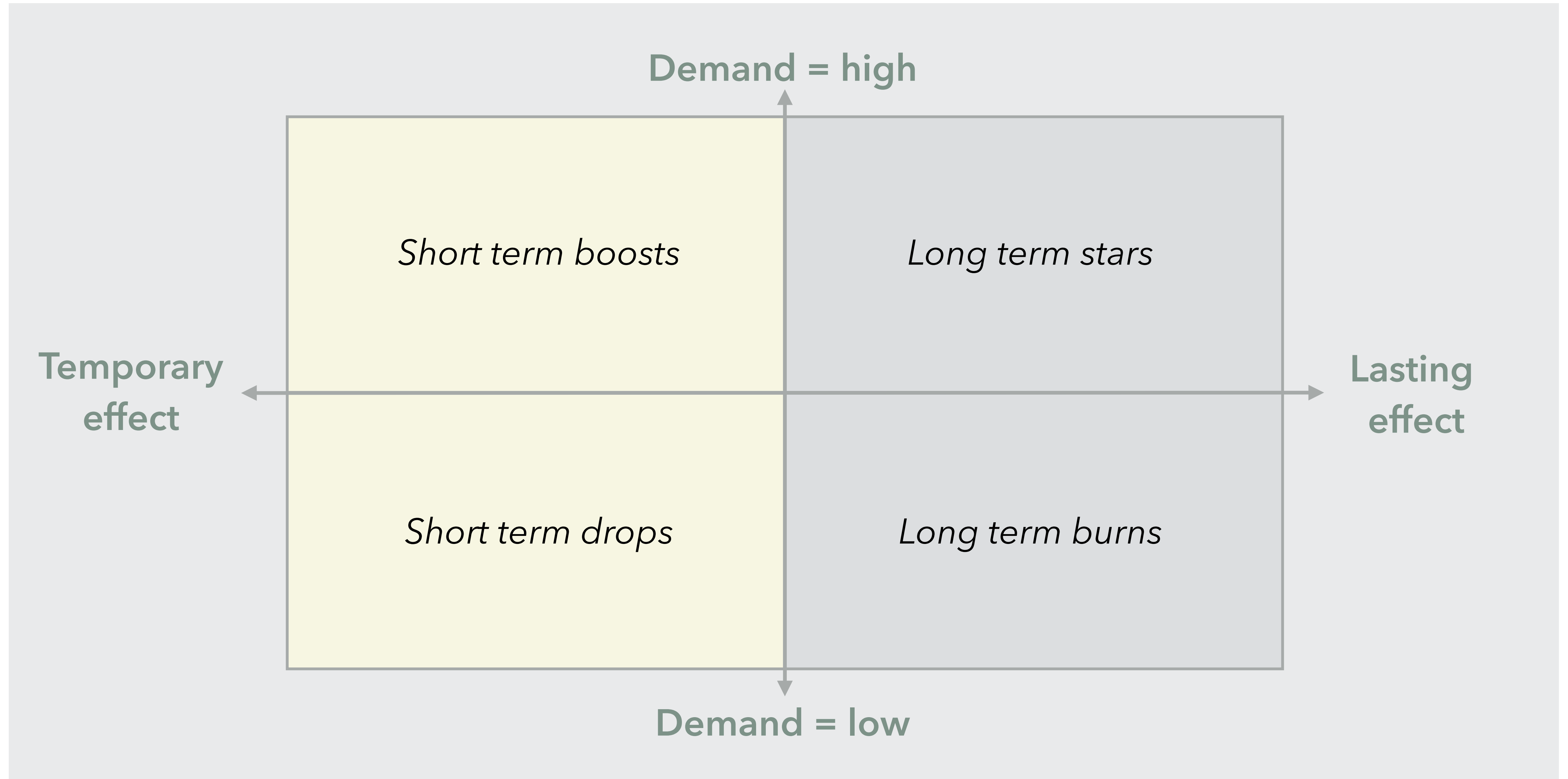


source: [abcnews](#) Apr 9, 2020

There will be winners & losers



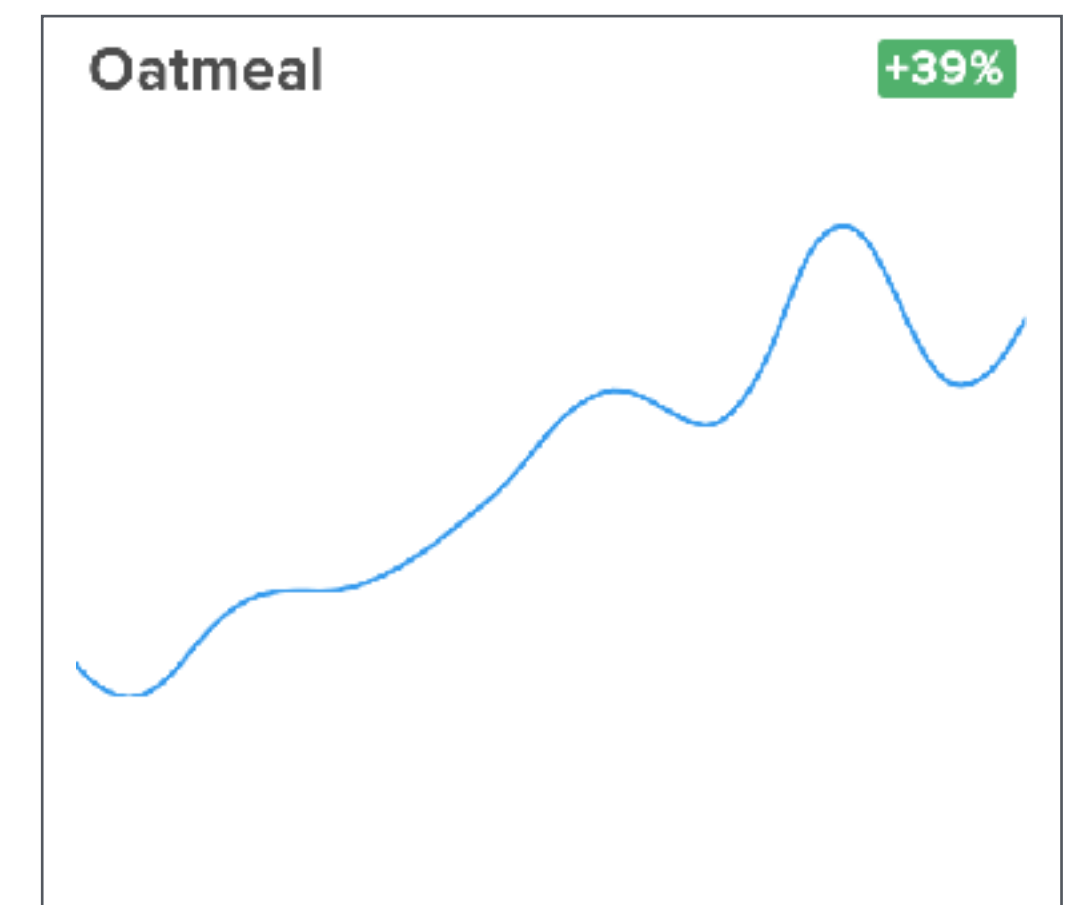
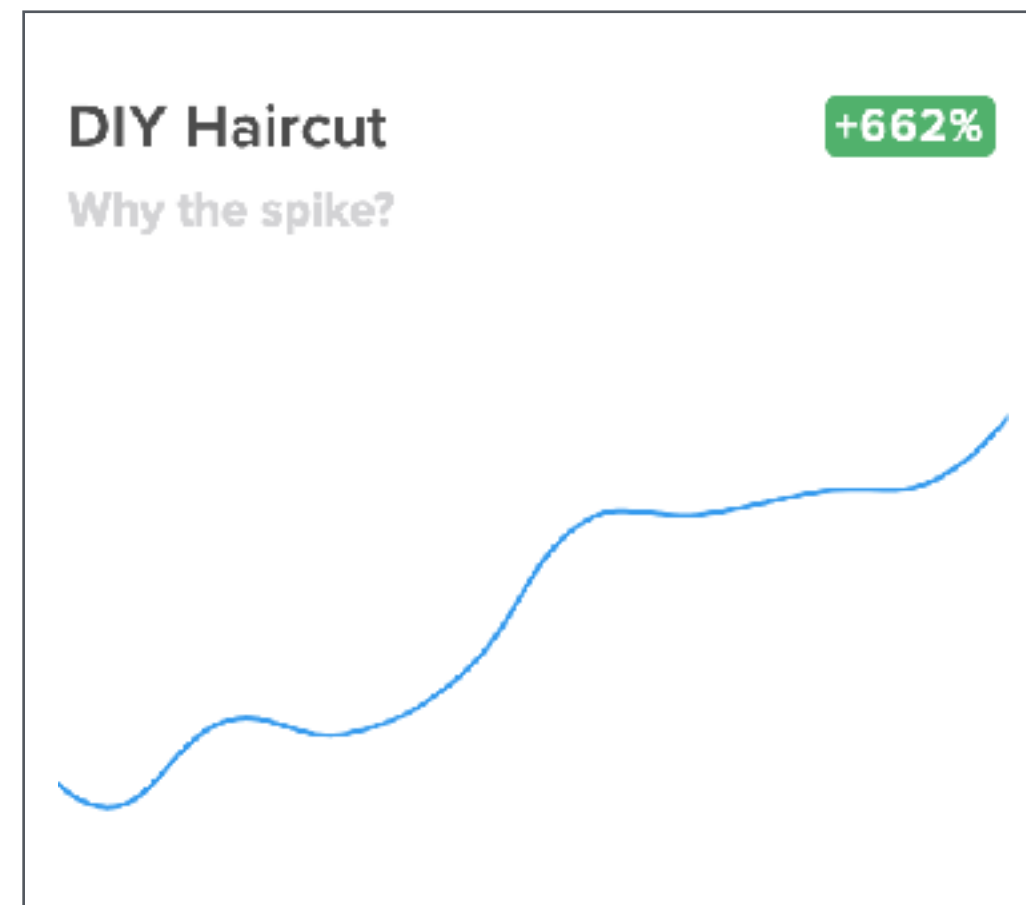
Short term: winners & losers



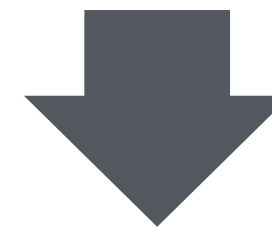
Short term: winners



Demand



Short term: losers



Demand

26 Automotive Mats **-50%**



Shelter-in-place orders have been implemented across the country and, except for the occasional grocery store trip, consumers not driving their cars have fewer needs for automotive parts and accessories.

45 Sunglasses & Eyeglasses **-43%**



Demand for sunglasses has declined, since many family vacations and other outdoor activities have been delayed.

84 Golf Clubs **-33%**



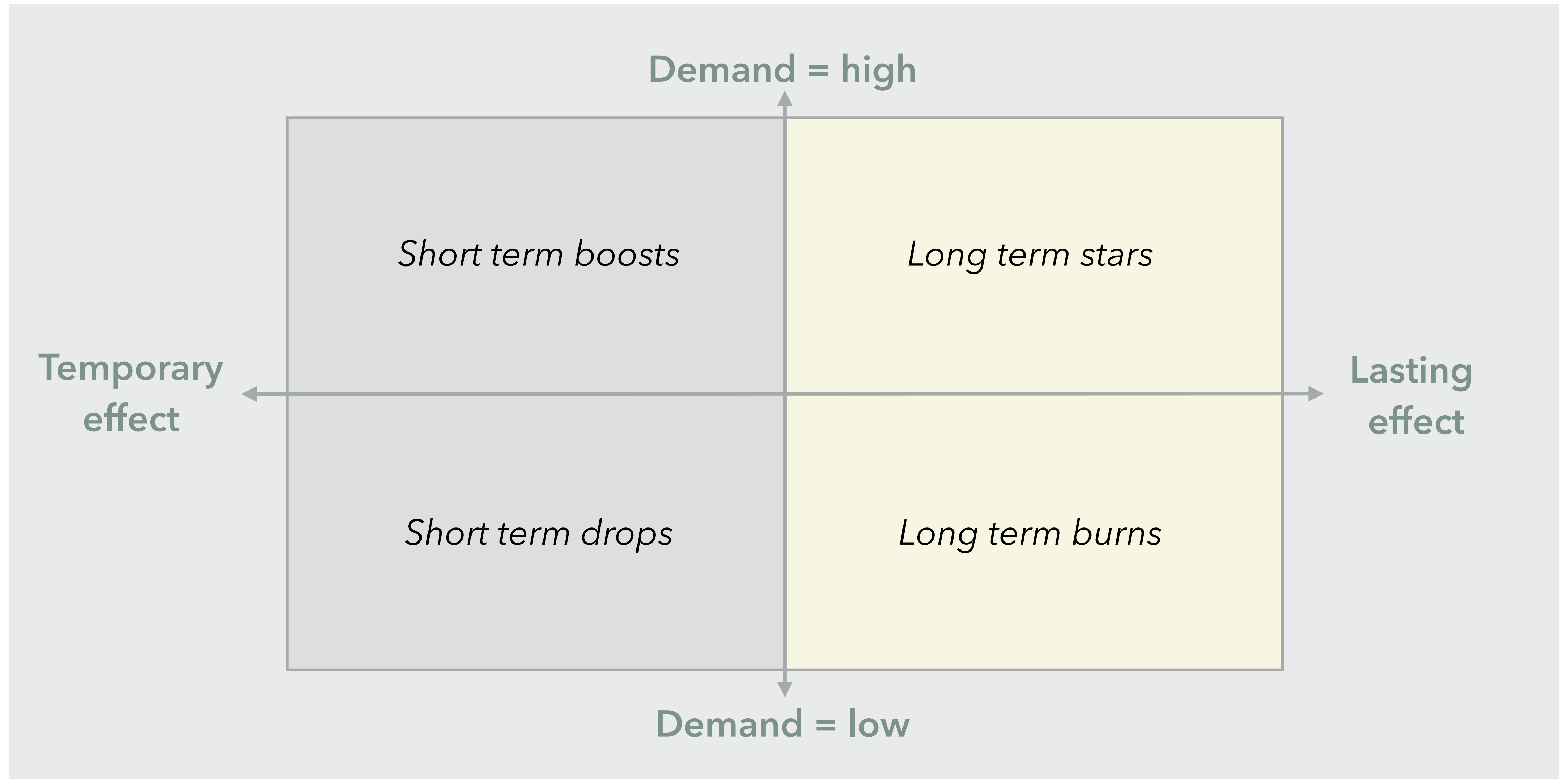
While spring and summer are typically popular times for golf, courses are closed and consumers are seeking new indoor activities, rather than a new set of golf clubs.

58 Camping Equipment **-39%**

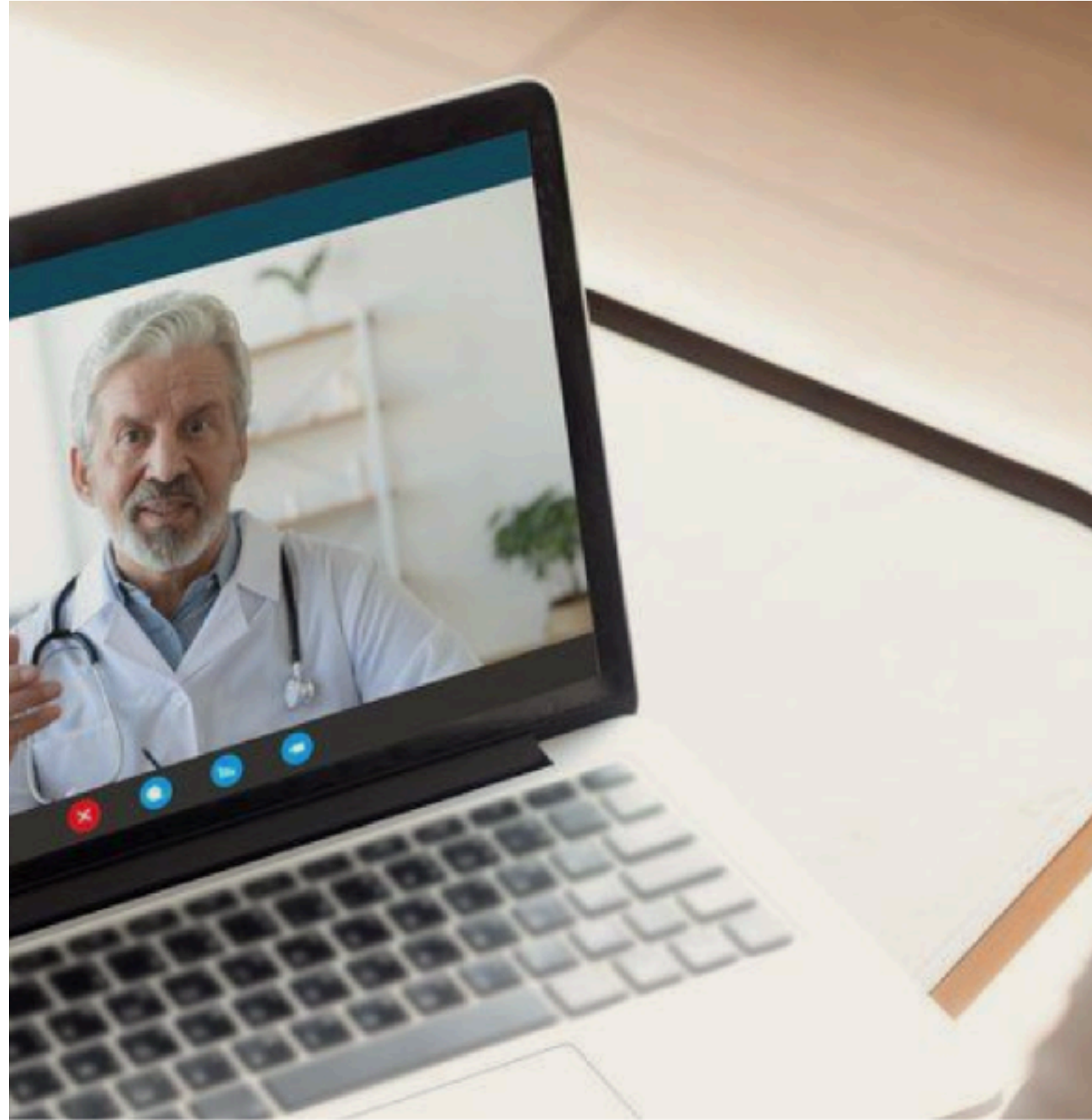


Many public parks, hiking trails and campsites are closed, resulting in a decreased demand for new equipment.

We need to think more critically about the long term



Both companies & consumers changed course already.



Businesses have pivoted from to fully-remote. (changes in IT, policies,...) inc. more traditional industries

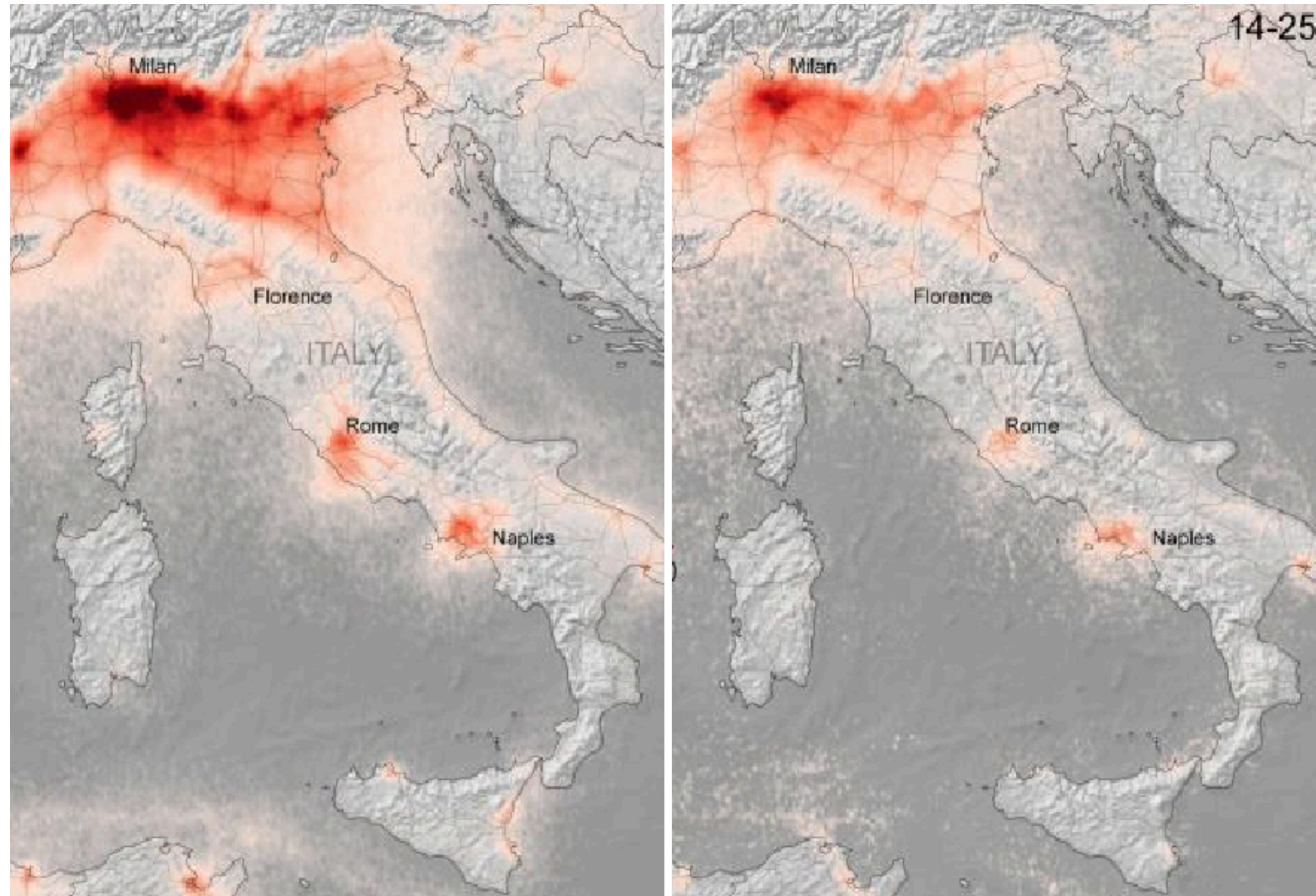


Upgraded homes: gym, workplaces, kitchen appliances, entertainment,...



Communities have found new ways to stay connected.

Be careful: a wish is not a prediction



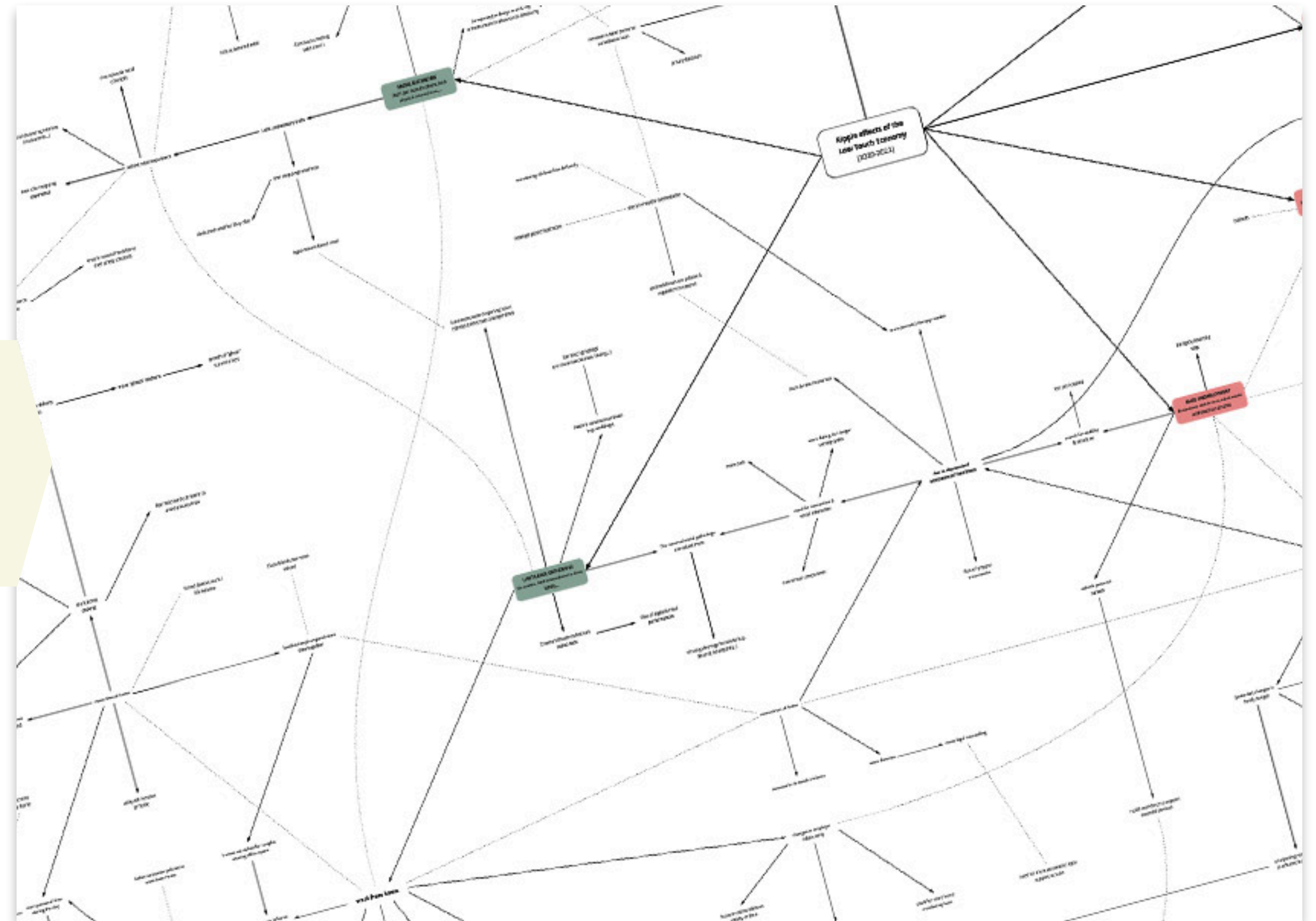
For now, people didn't change their view on climate change and how to respond.



VR has critical bottlenecks why adoption was slow so far. This crisis didn't take these hurdles away.

1 shift could lead to many ripple effects

Download all reports & materials here:
lowtoucheconomy.com



Hygiene theatre

Today.



Tomorrow?



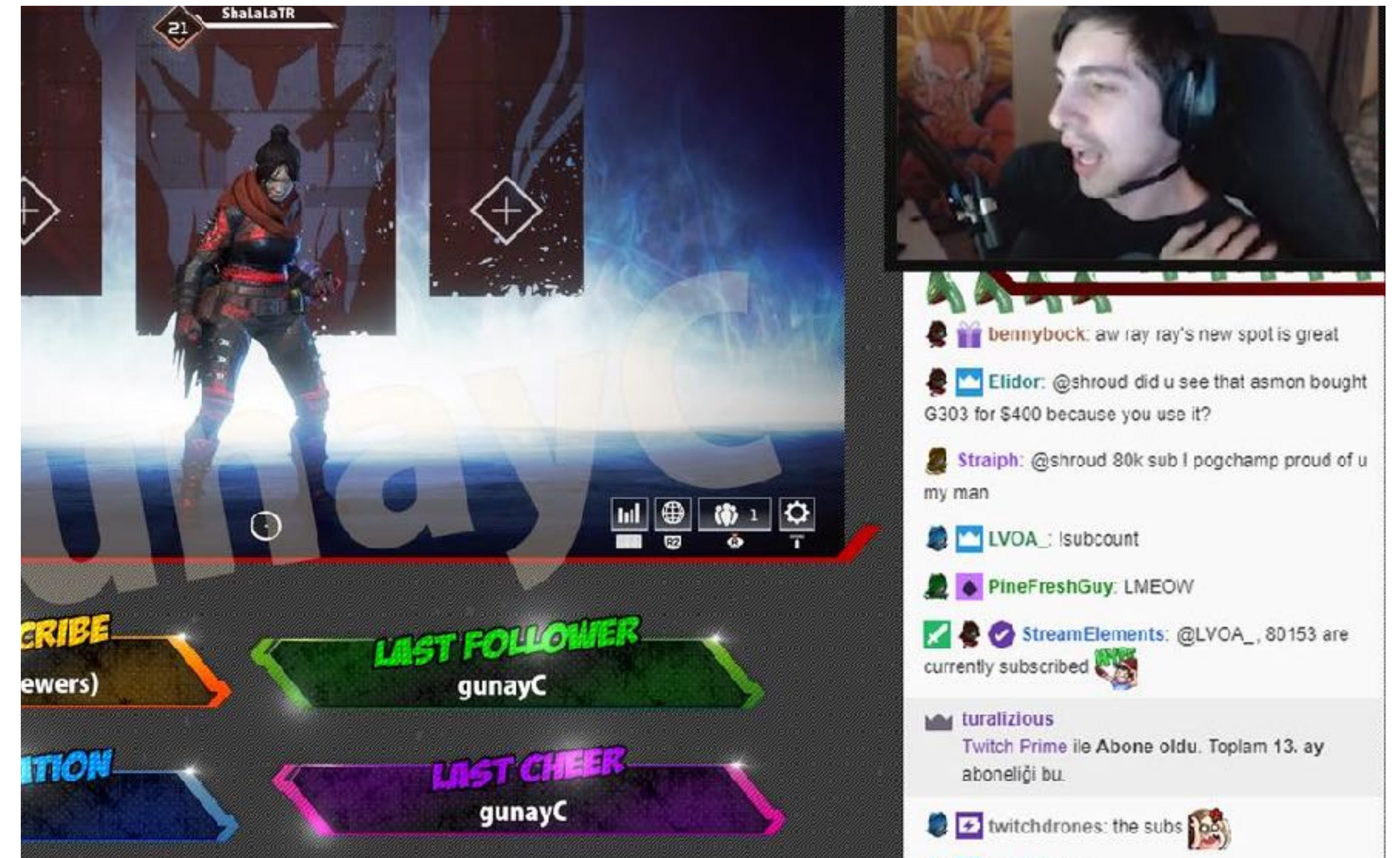
New security gates, packaging, hospitality rituals,
to signal "this product is safe to use"

Personal identity reshuffle

Today.



Tomorrow?



New (digital) status symbols, mixed identities,
new role for fashion & luxury,...

Shared mobility ~~victory/backlash/...~~

Today.



Tomorrow?



Preference for individual transport vs sharing/touching assets?

Every industry will face different challenges

Industry characteristics

← If characteristic is present in your or your clients' business, impact is negative (unless you successfully pivot). →

	Large gatherings are essential	Close human interaction is essential	Hygiene, or perception thereof, is critical	Dependant on travel (business and leisure)	Service or product is postponable or expendable	Impact analysis
Tourism and hospitality	Very high	Very high	High	Very high	High	Very high
Sports	Very high	Very high	Medium	Low	Medium	High
Music	High	High	Low	Medium	Medium	High
Automotive	Low	Low	Medium	Low	Very high	High
Beverages (Alcohol)	High	High	Medium	Medium	Low	Medium
Retail (non-food)	High	Medium	Medium	Medium	Medium	Medium
Pharmaceuticals	Low	Low	Medium	Low	Low	Low

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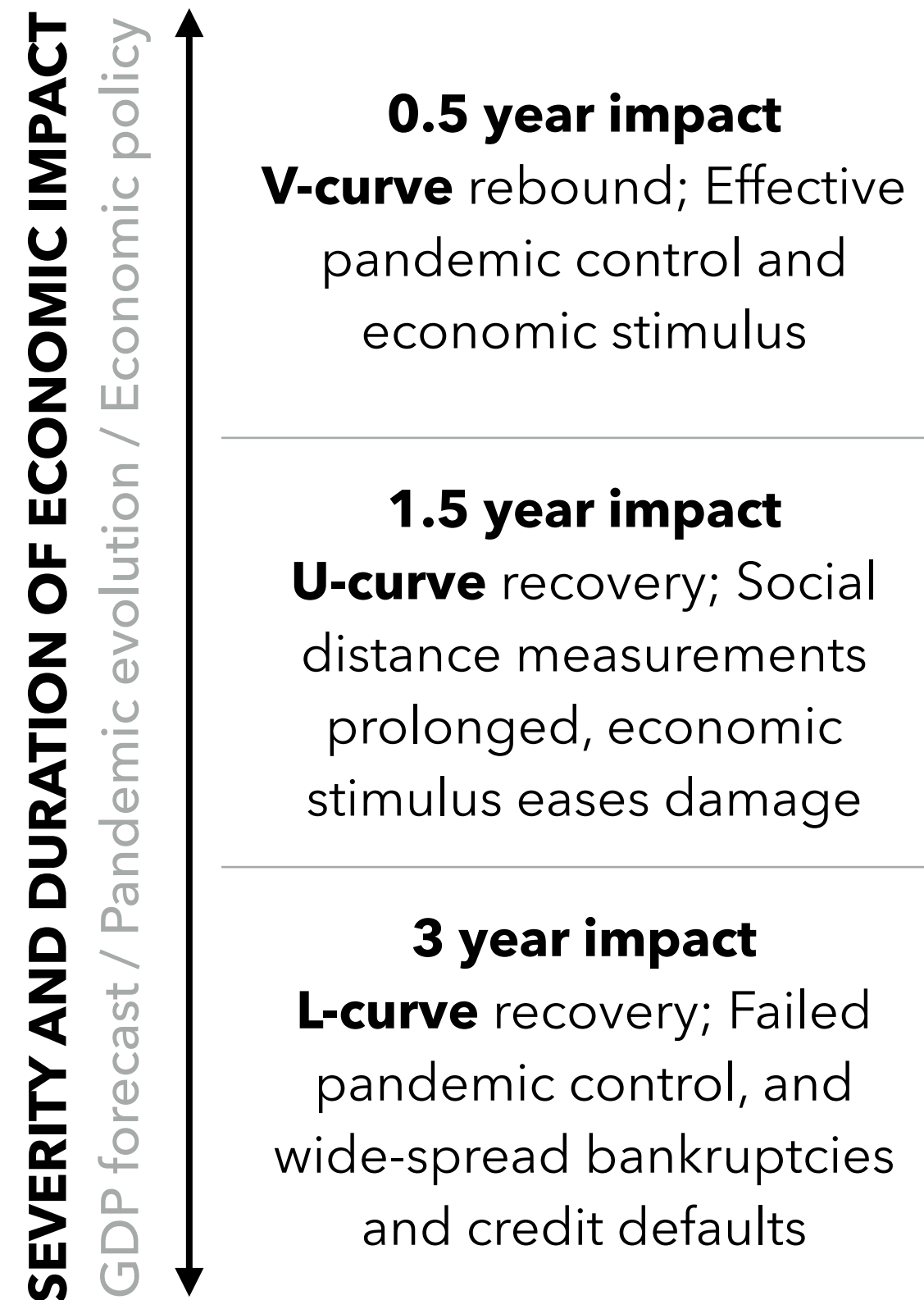
Scenario planning:

Is it a 6 months or an 18 months problem?

How will it impact my different businesses?

What if Harvard's scenarios pan out?

Adapt your strategic response



Adapt your strategic response



Poll:

How would you describe the impact on your organisation?

1. **Positive** (revenue growth)
2. **Mildly negative** (0 to -15%)
3. **Severe** (-15 to -50%)
4. **Catastrophic** (over -50%)

Our expectation:

Most organisations will not be able to push through this crisis as they did in 2008.

Adapt your strategic response

		IMPACT ON YOUR ORGANISATION			
		Direct impact of Covid-19 / Indirect impact of economic recession / Ability to adapt fast			
		Positive Revenue growth through demand surge <i>e.g. E-commerce</i>	Mildly negative Sustained revenue loss of 0-15% in Q2-4 2020 <i>e.g. Consumer Goods</i>	Severe Sustained revenue loss of 15-50% in Q2-4 2020 <i>e.g. Oil and gas</i>	Catastrophic Sustained revenue loss of +50% in Q2-4 2020 <i>e.g. Tourism</i>
SEVERITY AND DURATION OF ECONOMIC IMPACT GDP forecast / Pandemic evolution / Economic policy	0.5 year impact V-curve rebound; Effective pandemic control and economic stimulus	Ride the wave: boost supply to keep up with demand surge	Push through and prepare for fast back-to-normal upswing	Survive and prepare for relatively slow back-to-normal recovery	Mothball large part of the business and prepare for re-start
	1.5 year impact U-curve recovery; Social distance measurements prolonged, economic stimulus eases damage	Push for growth and market share	Defend, improve competitive position, and find new growth	Pivot through organic innovation and inorganic growth, or divest	Pivot through organic innovation and inorganic growth, or divest
	3 year impact L-curve recovery; Failed pandemic control, and wide-spread bankruptcies and credit defaults	Aggressive push for growth and market share	Defend, improve competitive position, and find new growth	Prepare for aggressive new entrants. Reinvent and create totally new position, or abandon	Last survivor strategy or abandon market

Adapt your strategic response



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Adapt your strategic response

Covid-19 Strategy Matrix

boardofinnovation.com

IMPACT ON YOUR ORGANISATION

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Note: strategic response also depends on financial strength, competitive position and industry attractivity.

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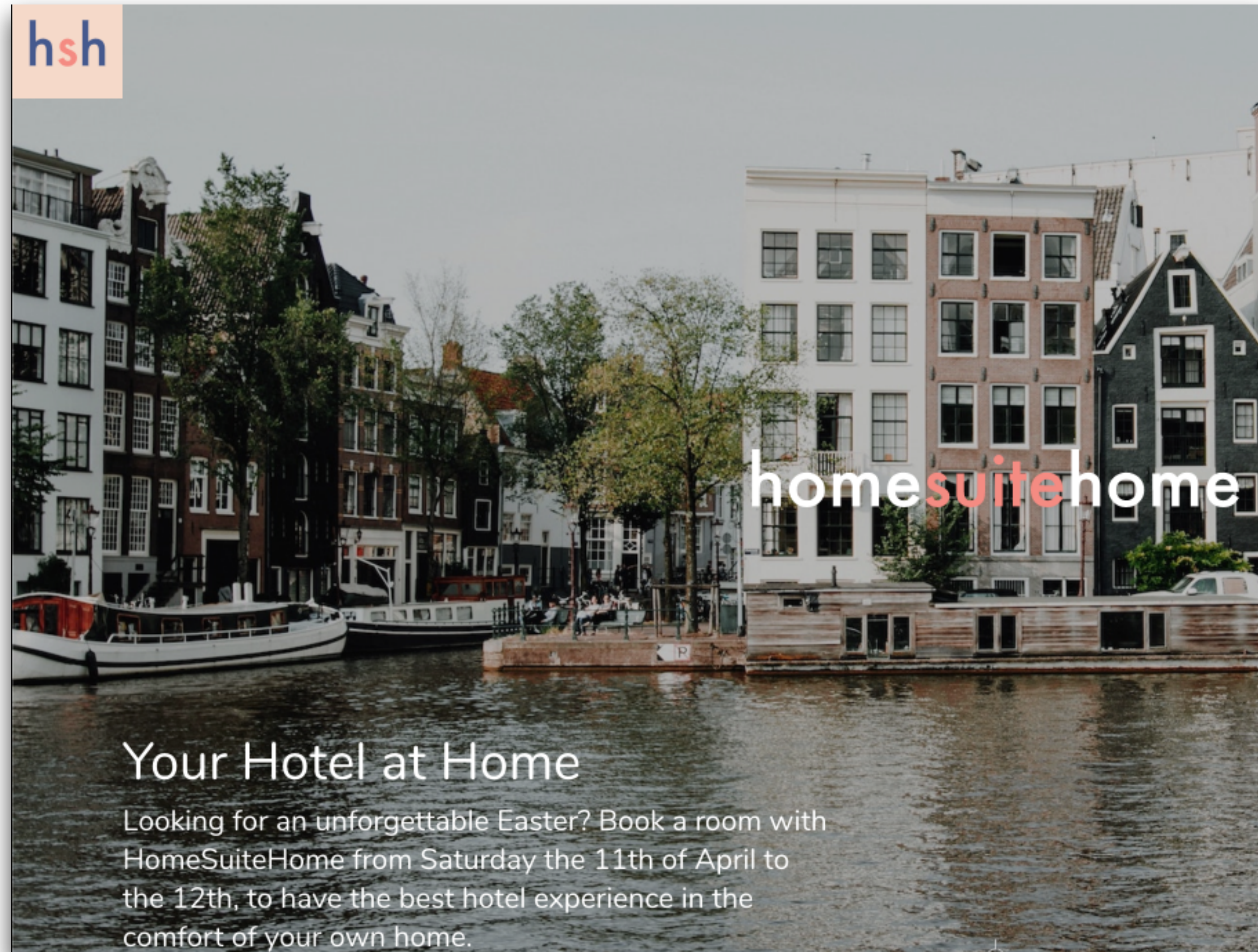
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Examples:

What type of pivots do we see already?

Pivot 1: HomeSuiteHome



hsh

homesuitehome

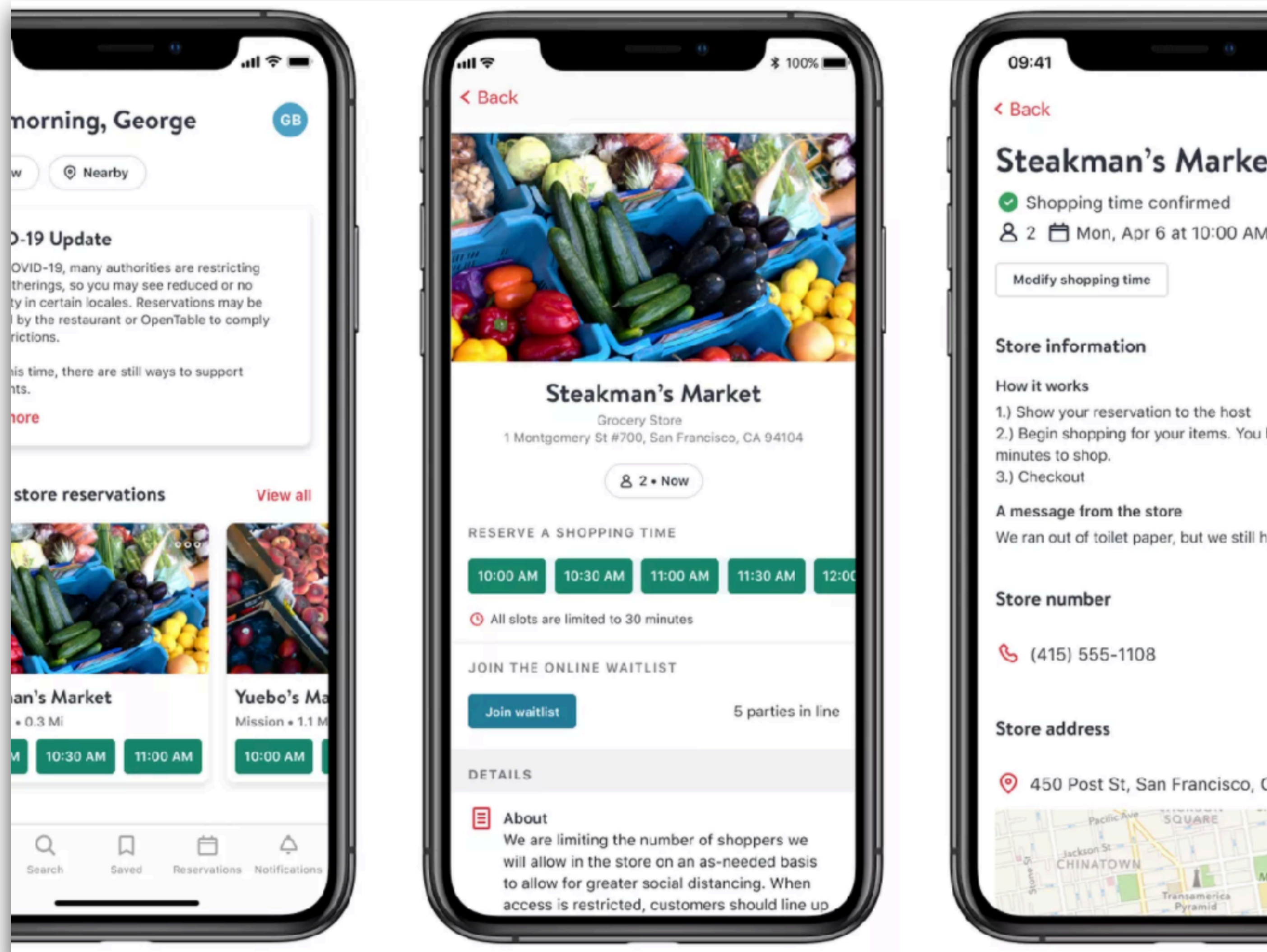
Your Hotel at Home

Looking for an unforgettable Easter? Book a room with HomeSuiteHome from Saturday the 11th of April to the 12th, to have the best hotel experience in the comfort of your own home.

Agency catering to hotels pivots to providing a **hotel experience for citizens staying-at-home**

Pattern: change of channel and customer (direct-to-consumer)

Pivot 2: OpenTable



Restaurant booking app pivots to **bookings for retail visits**

Pattern: change of vertical

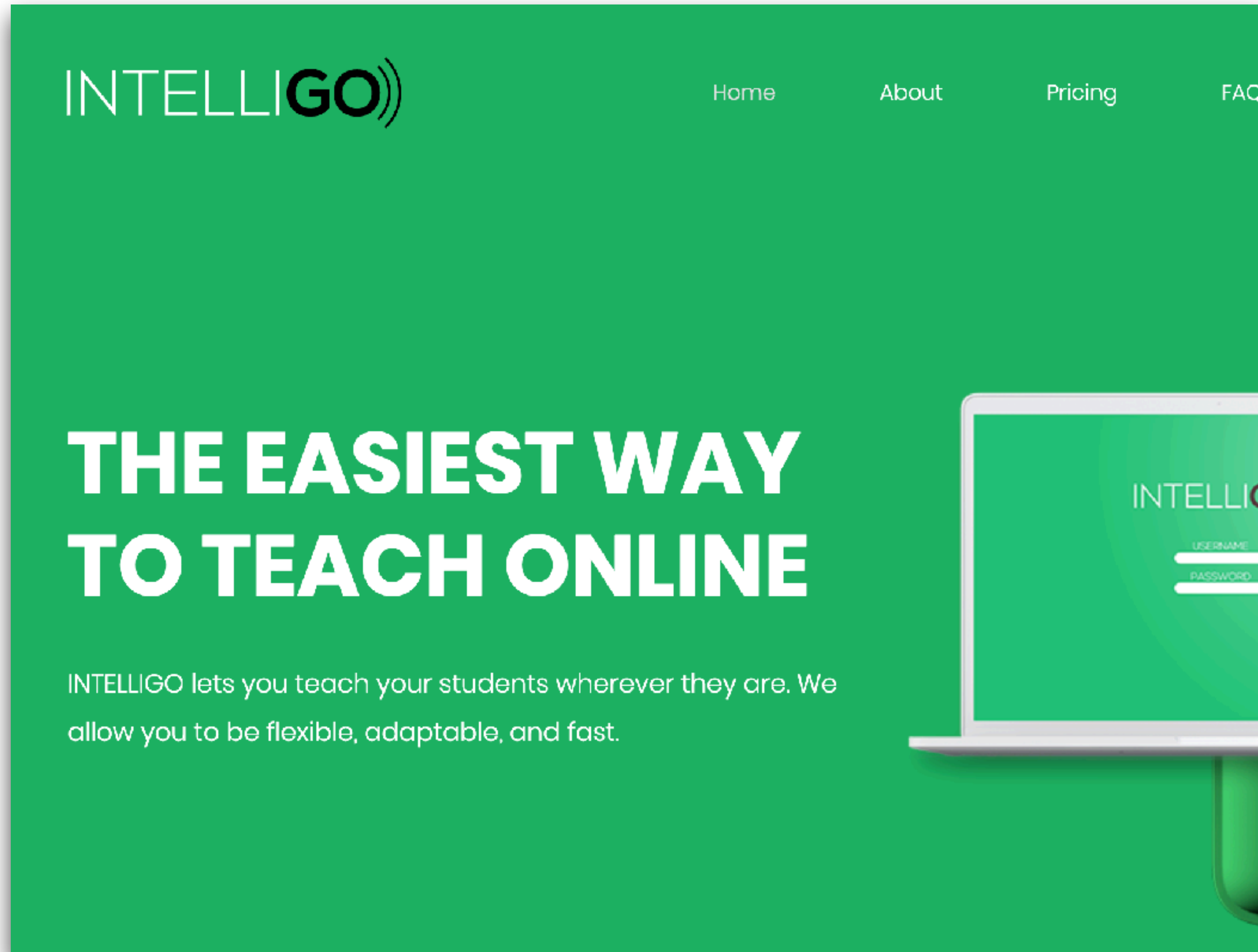
Pivot 3: Dyson CoVent



Household appliances company pivots to **producing ventilators**

Pattern: change of product and change of vertical (Dyson here to stay in medical?)

Pivot 4: IntelliGO by SXS Events



Events production company pivots to **production of online learning**

Pattern: change of vertical and change of service, using core assets

Public list of Business Model Shifts

Read first: Excluded from list

- Pivots that are focused on temporary pivots (e.g. pivots to making masks, sanitizers, drugs...)
- temporary marketing and/or charity campaigns

Pivot summary (max 35 words)

Country	Pivot summary (max 35 words)	1	2	3	4	5
IL	Up Hotel Agency offers a hotel booking system. They launched a new brand to bring a hotel experience to your home.(service includes remote concert, concierge, curated box with local products)	n	y	y	n	n
US	Restaurant bookings services switches to time slot reservations for retail/supermarkets.	y	y	n	n	n
UK	SXS Events is a production company for large events. Their video production experience made them switch to online education. They now help with video production of e-courses.	y	n	y	n	y
AU	Normally supports pop-up bars at events. They used their liquor license to sell & deliver alcohol.	y	y	y	y	y
UK	Booking agencies for musicians/artists switched to online booking of personalised music messages.	y	y	y	y	y
UK	From offline Art Workshops to online art courses	y	y	y	y	y
GE	From online apparel for men, now adding new product lines (cleaning, some grocery items...)	y	y	y	y	y
TR	From selling sandwiches switching to online selling of basic grocery items (milk, bread...)	y	y	y	y	y
US	Stagekings normally build stages for large events. Switched to providing standing desks to support working from home	n	y	y	n	n
AU	Stagekings normally build stages for large events. Switched to providing standing desks to support working from home	y	y	y	y	y
	... switches from hotels to social distancing services to get restaurants up & delivery solutions	y	y	y	y	y
	... switches from hotels to social distancing services to get restaurants up & delivery solutions	y	y	y	y	y

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In the chat:

What other smart pivots have you seen?

Switching from defense

Mitigating the biggest risks is crucial, from a health & safety, operational as well as a P/L point of view. This is an ongoing effort.

to offense

But it's time to prepare for the next phase. Industries that were stable for a decade are now wide open to turn around.

Fast and decisive movers will win.



During the recession, **Sanofi**, the French pharmaceutical company, increased its absolute R&D expenditure from €950 million in 2000 to €1.3 billion in 2003, to keep its product pipeline robust. The company gained market share and **outperformed peers** in the stock market. Afterwards the company was well positioned to acquire Aventis, a much larger Franco-German pharmaceutical company, after a takeover battle, in the economic upswing of 2004. ([HBR](#))

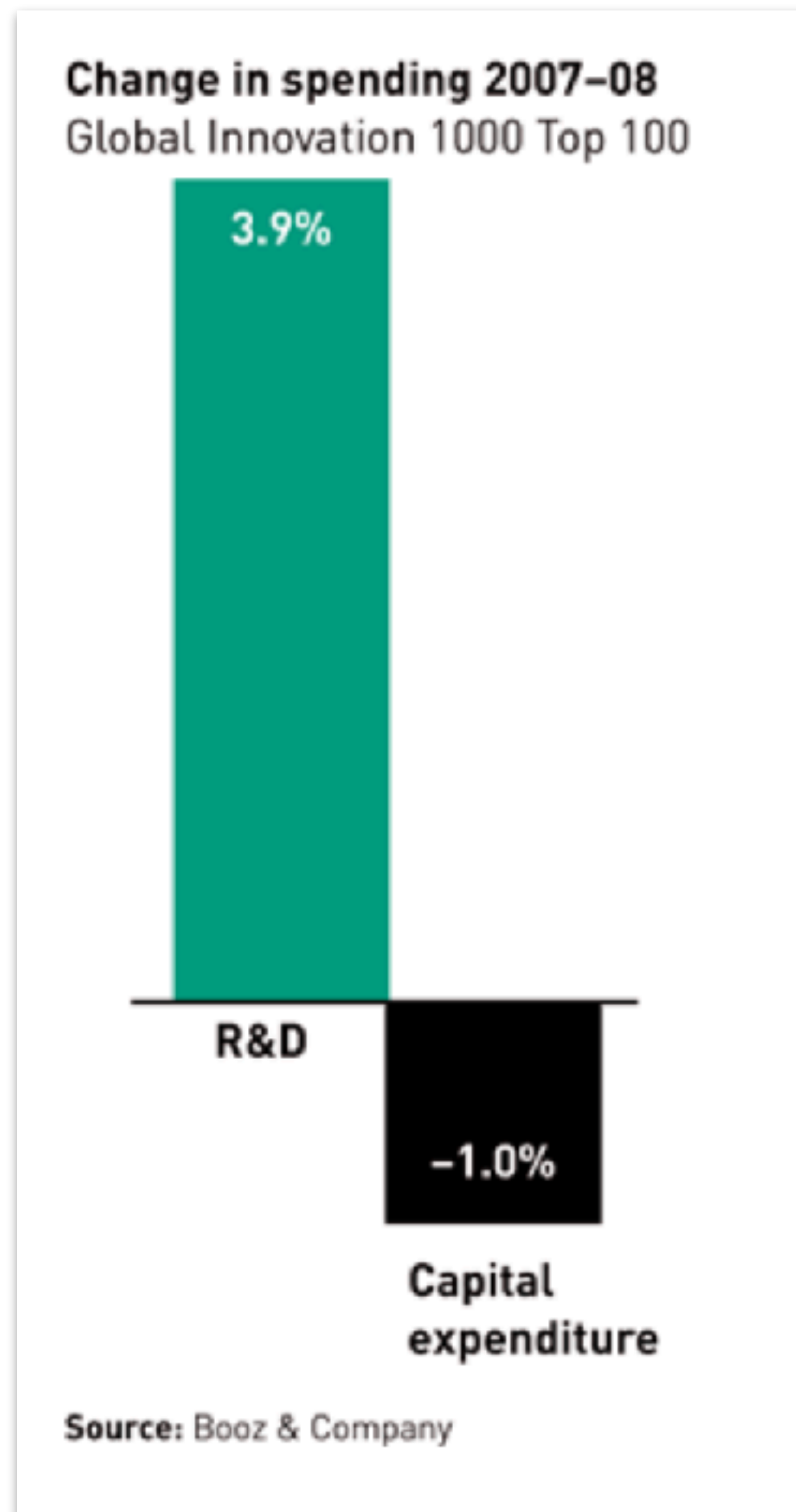


The outbreak of SARS was a pivotal moment that put **Alibaba** on its path to becoming a \$470 billion e-commerce behemoth. ([CNBC](#))



Cosmetics company **Lin Qingxuan** was forced to close 40% of its stores due to Covid-19. The company redeployed its 100+ beauty advisors from the stores to become online influencers who leveraged digital tools, such as WeChat, to engage customers virtually & drive online sales. As a result, its sales in Wuhan **achieved 200% growth** compared to the prior year's sales. ([HBR](#))

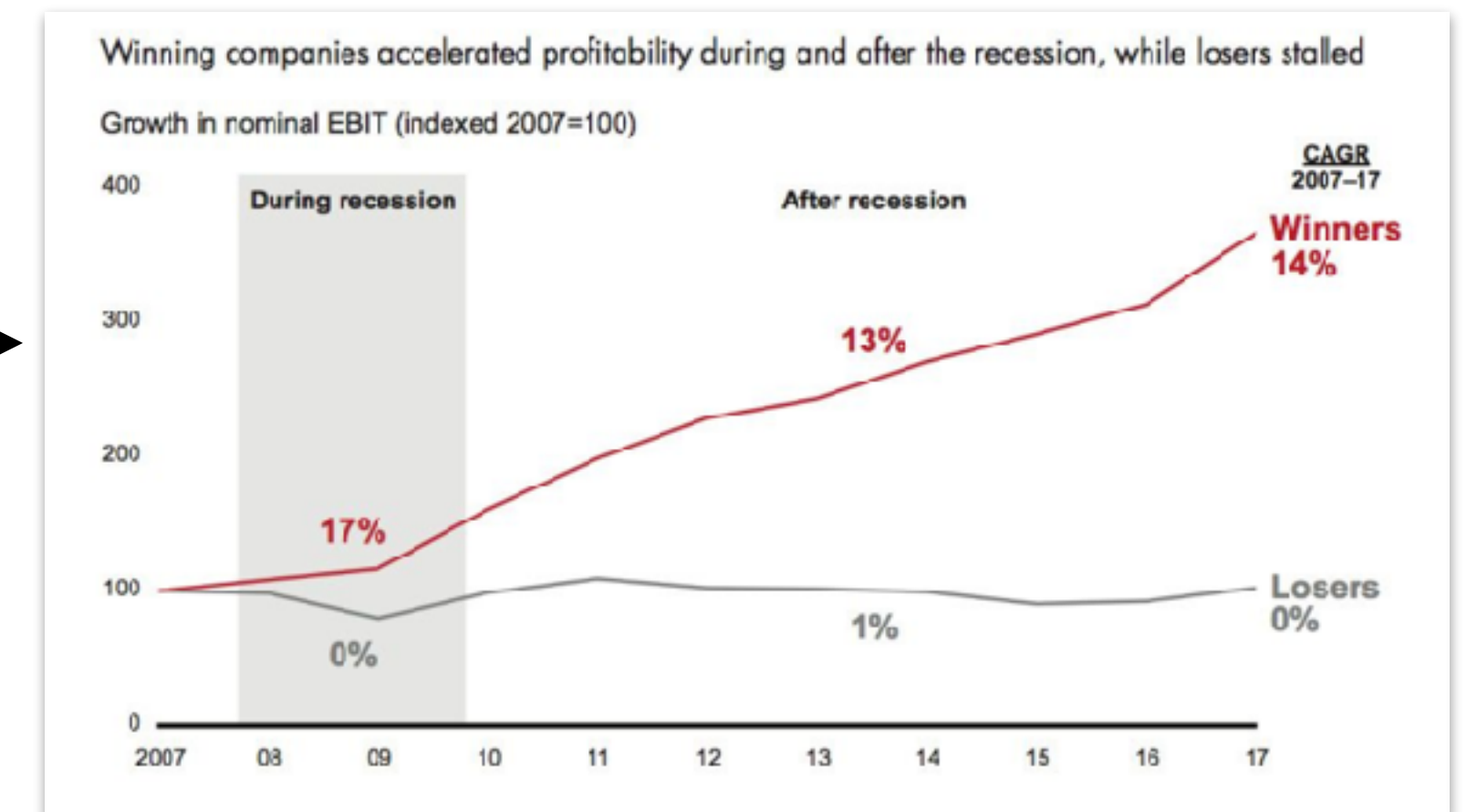
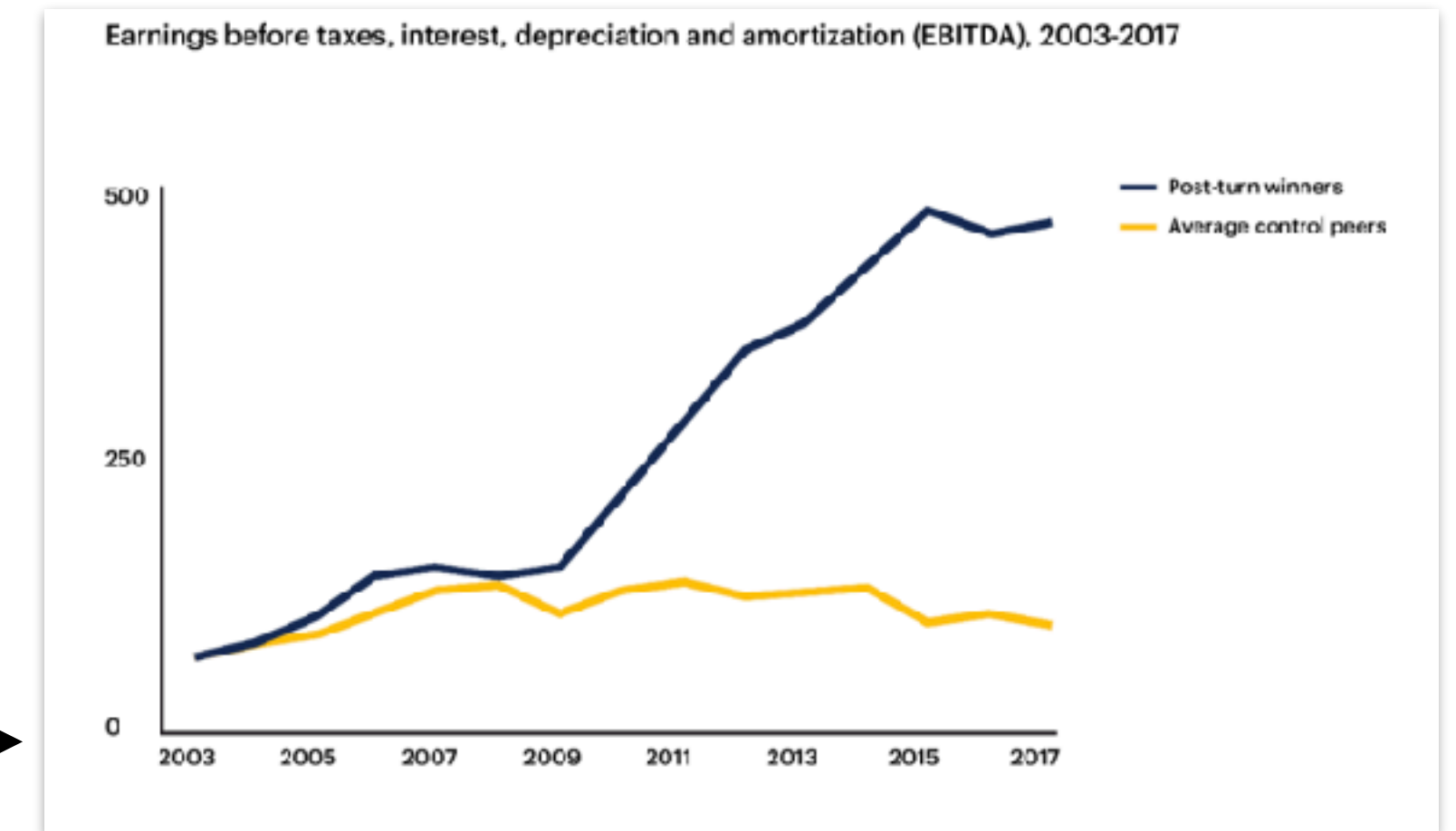
Now is the time invest in innovation & R&D



The 100 most innovative companies **spend even more on R&D** during a recession, while others were stalling. In the long run, these investments are **paying off in profitability & growth**.

Gartner looked at 30 F1000 companies that accelerated during the crisis of 2008. All of them **invested in new growth options instead of just cutting costs**.

Also, Bain & Company came to a similar conclusion after analyzing 5000 companies over 10 years. Growing outside of the core business was named as one of the strategies to win.



Key take-aways:

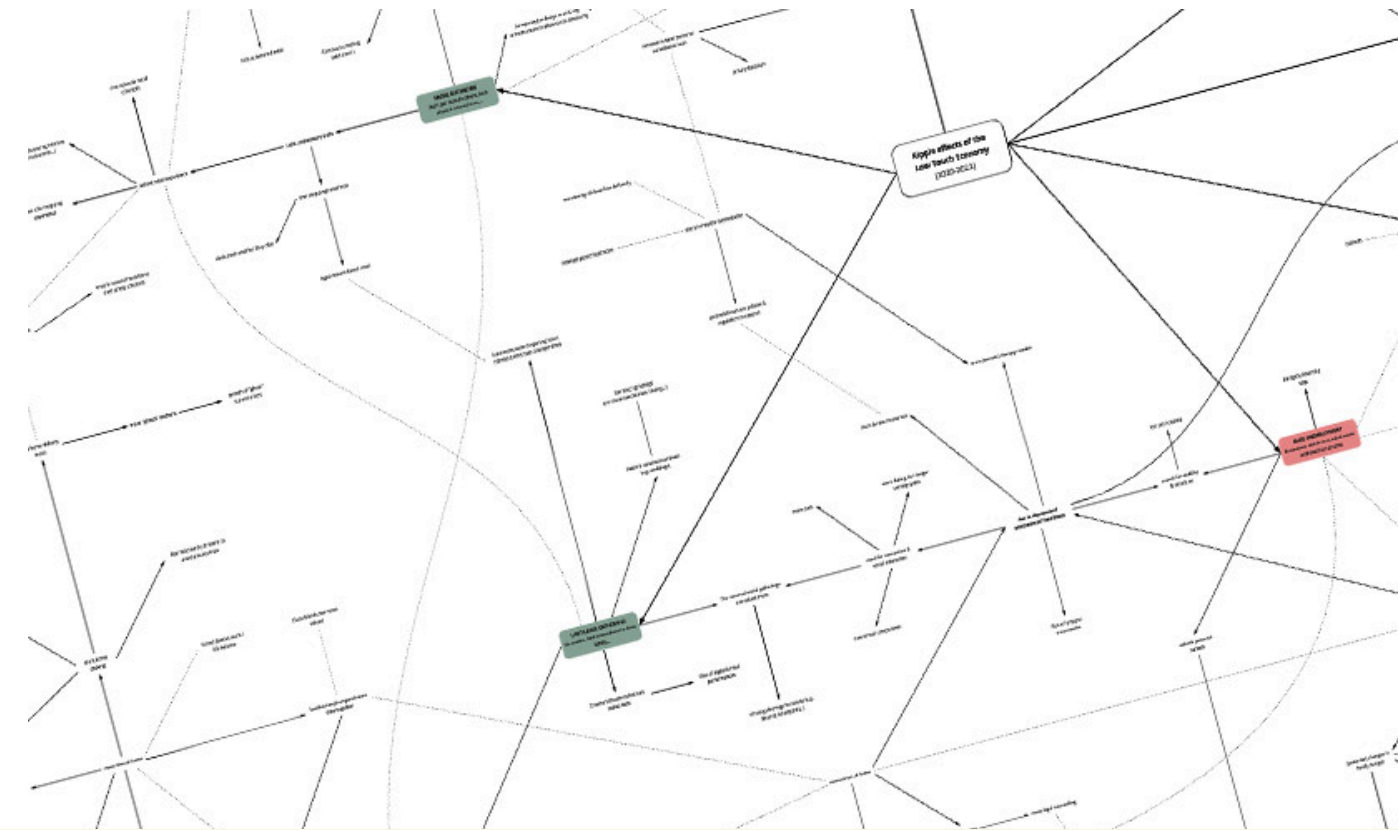
01 The Low Touch Economy is here to stay

02 Scenario plan your strategic response

03 Go on offense, not just defense

Questions? Let's discuss.

Let's
not
make
this the
end!



Free reports and tools

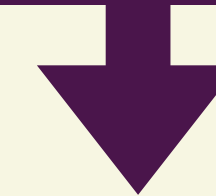
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We'll be sending everyone the recording and the slides.



Continue the discussion



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innovation

**Thank you
and stay safe**

For all your inquiries:
philippe@boardofinnovation.com

