

mapic[®]

Palais des Festivals, Cannes, France
17 - 19 November 2020

#MAPIC
mapic.com

Highlight & Vision 2020



**LIVE
PLAY
SHOP**

EXECUTIVE SUMMARY

1

MAPIC 2020
DIRECTIONS

2

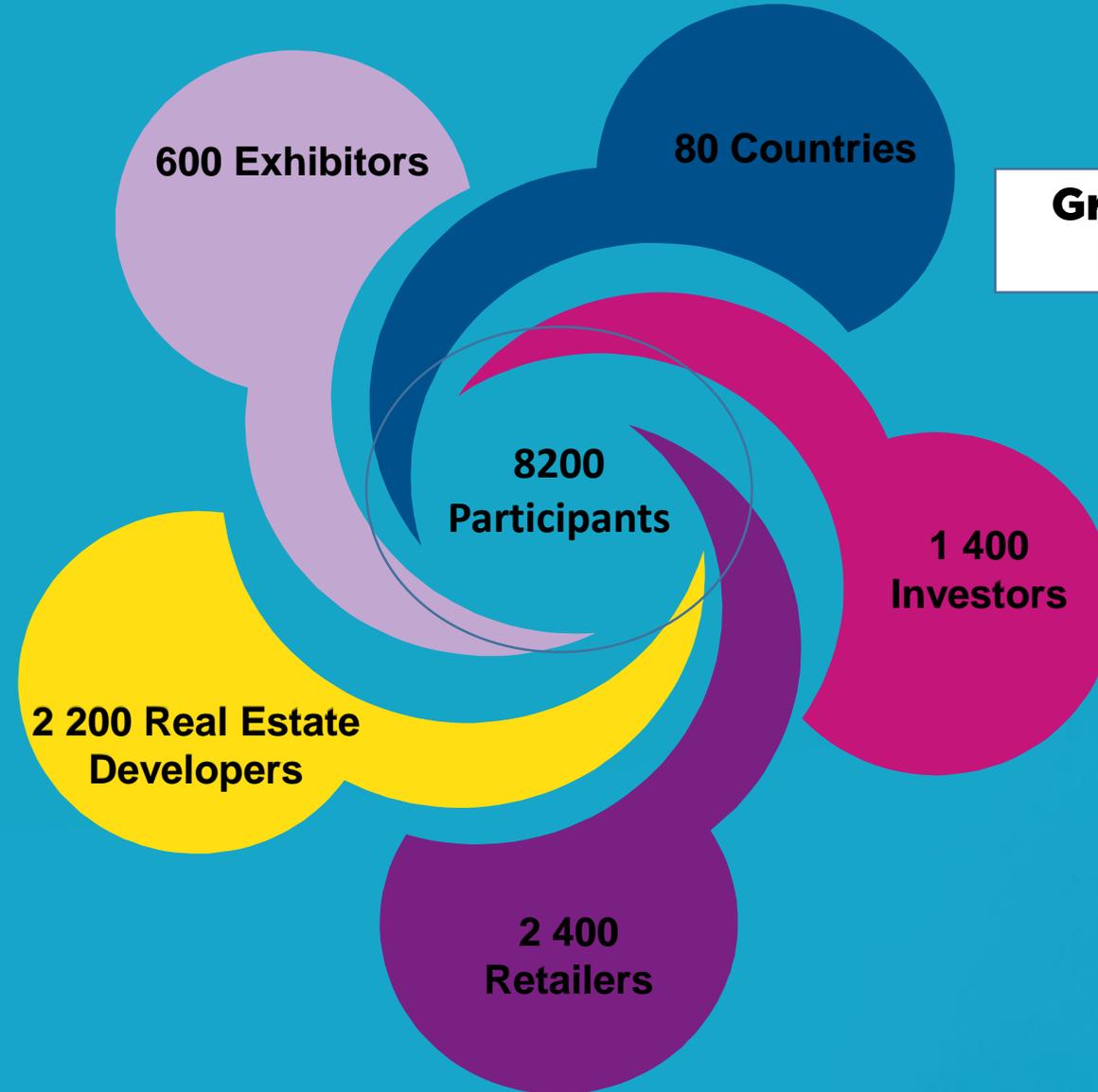
MARKETING &
CONTENT
STRATEGY

3

COMMERCIAL
STRATEGY



Key Figures Vs last year



Great figures in a difficult industry environment

Increase of the global MAPIC NPS



(35, + 20 pts vs. 2018) mainly due to:

- MAPIC confirmed as a powerful networking event in the industry: excellent networking opportunities, a very well-organized event, with a high quality profile of attendees. Participant directory usage and recommendations have a positive impact on Customers NPS (36.3 and 47.8 vs. 35).
- Leisure Day : visitors participating in the Leisure Day gave a high topline score and are more intend to return, with almost all (91%) of them satisfied with the event.

Need to be improved!

visibility and accessibility of Retailers (core target): highlight in communication tools and programme, pricing strategy, reinforce quality and communication on the Retailers Lounge.

networking and matchmaking :

- Increase education on show preparation through specific communications, show services and tools (especially on 1st timers Exhibitors)
- Use matchmaking data to feed onsite networking opportunities (closed door events, similar interests meetups sessions).

34

NPS VISITORS
VS 17 LY

37

NPS EXHIBITORS
VS 11 LY

1. STRATEGIC DIRECTIONS 2020

Market trends & MAPIC opportunities

Industry trends: *under transformation*

- **Retailers** face decreasing profitability due to online competition, the **need to invest in digital solutions and in remarkable customer experience**. High numbers of store closures and concentration on key locations
- **Investors become more selective in their choice of retail assets**, with a preference for assets that offer either experiential retail or iconic locations
- **The amount of completions in Europe was the lowest of the previous 24 years and is comparable with the volumes delivered in the early 1990s**. In the majority of European countries, the shopping centre market is approaching maturity and demand for shopping centre space is in relative equilibrium with supply. **Developers are focusing on redevelopment, extension and refurbishment projects**, aimed at creating modern pleasing shopping and entertainment/leisure centres. Many shopping centres located in existing secondary retail space are likely to be transformed into mixed-use schemes such as hotel, office & residential.

With new Market Opportunities

- **Mixed use, experience and services**
Leisure and food & beverage market saw the highest growth, having expanded at **34%** annually over the past two years. Large flagship schemes are almost exclusively mixed use and contain retail, F&B, leisure, residential, co-working, hotels, fitness, health and wellness.
Opportunities: 1/Launch of LeisurUp 2/Integrate city-centre urban players @MAPIC 3/Continue to increase the presence of retail companies focused on people services and experiences (wellness, culture & education, sport, health & beauty...)
- **Innovation**
Technologies and analytics are helping leaders make more informed location decisions; and better understanding of shoppers' behaviour can improve operational efficiency and lower costs.
Opportunities: Continue to diversify innovative solutions offer inside the MIF
- **Retail logistics**
The rise of e-commerce and the digital marketplace phenomenon, generated delivery schedule challenges traditional logistics and supply chain models, and companies are now forced to adjust their strategies to provide the low-cost and on-demand delivery services
Opportunities: Integrate retail logistics providers in the scope

Covid 19 situation

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Has strongly and internationally impacted the whole value chain of the retail & retail property industries: from production, to expansion plans and leasing issues.

Therefore, we revised the 2020 show main theme to a more industry challenge focus:

Embrace Collaborative Retail: ready to change the rules?

“With the Covid-19 pandemic and the huge difficulties the retail and leisure industries are facing and will face, the world of retail will rely more on collaboration: on sharing data, lease reductions if necessary, with humanity at the heart of the business.”

As she officially launches MAPIC 2020, event director **Nathalie Depetro** reflects on how we must all share these difficulties and adapt through new business models.

Read the interview Homepage MAPIC.com or blog

<https://www.globalrealestateexperts.com/retail/embracing-collaborative-retail-ready-to-change-the-rules/>



4 main strategic axes

STRONGLY REINFORCE RETAILER PRESENCE AT THE HEART OF THE MARKETPLACE

Next generation retail

EMPHASIZE SHOPPING & MULTI USAGE URBAN DEVELOPMENT

A true mixing of uses

ENLARGE THE SCOPE OF INNOVATION TO RETAIL LOGISTIC & E-RETAILING

Spotlight on Innovation

INCREASE CUSTOMER VALUE through MATCHMAKING SOLUTIONS

4 main strategic axes

STRONGLY REINFORCE RETAILERS PRESENCE AT THE HEART OF THE MARKETPLACE

1/ Leisure strong focus through the Launch of LeisurUp “Build unique, vibrant and lively experiences for spaces and places!”

A stand alone exhibition co-located with MAPIC (1 day prior, 1 day during). 3000 sq.m/50 Exhibitors/2,000 participants

Offer a specific programme to MAPIC clients

2/ Place retailers at the heart of the show value proposition

- Consolidate historical key accounts from the Fashion industry (traditional retail): **500 accounts**.
- Focus on new retail occupancy segments: Leisure, Food, Wellness, Beauty, Healthcare: **20% annual growth**
- **Creation of a specific retailer journey**: Maintain specific pricing policy + Create a Retailer talks Arena + Dedicated Retailers meetings Lounge.

Targets: 2600 retailers in 2020

4 main strategic axes

STRONGLY EMPHASIZE SHOPPING & MULTI USAGE URBAN DEVELOPMENT

1/ Focus the conference programme structure on the new challenges of the retail property industry

- 1 day conference on Shopping as a service, part of the new mixed-use schemes (Retail, Hotel, Office & Residential)

Targets 2021: +100 attendees

- Dedicate the 2nd day to Retail redevelopment, extension and refurbishment projects (global trend)

2/ Focus on City urban development & Investment

- Extend the former City session to include a « Cities Summit » and launch a closed-door event between Urban Leaders & developers

Targets 2020: 90 city representatives

- Create an investment forum to highlight the new collaboration between all retail stakeholders

4 main strategic axes

ENLARGE THE SCOPE OF INNOVATION TO RETAIL LOGISTIC & E-RETAILING

- **Reinforce MIF** (MAPIC Innovation exhibiting area) with new innovative solutions: VR, Product customization, Visual search, E-commerce platform development, Omnichannel experiences, Pop-up shops, Social shopping...

Targets: +25% exhibitors per year

- **Increase recruitment of E-retailer** target audience: GAFAs, pure players & digital native brands

Targets: 100 E-tailers in 2022

- Develop **logistic providers presence** and add content on the impact of E-retail/urban logistic

Targets: 50 attendees 4 stands in 2021

4 main strategic axes

INCREASE CUSTOMER VALUE through MATCHMAKING SOLUTIONS

- **On-line matchmaking recommendations:** Revamp registration data collection to better identify customer business needs

Targets: 100% penetration rate

- **Creation of the very first on-line retailers Guide inside the OBD**

- **On-site matchmaking:** Invest in tool to pre-book meetings between buyers/exhibitors

Targets: 2020 organise pre-booked meetings for the top 30 exhibitors

2.

MARKETING & CONTENT STRATEGY

**EMBRACING
COLLABORATIVE
RETAIL:
READY TO CHANGE
THE RULES?**

Right now the retail market is facing a day-to-day challenge, from how to look after staff to how to pay rent, keeping each business viable, working with the supply chain and trying to share the burden so that the industry can come through this crisis together and rebuild.

This will require Embracing Collaborative Retail to focus on new business models for retail, mixing uses, compelling cities, refurbishment and extensions, sustainability and the innovation that underpins all of these.

#1 COLLABORATIVE RETAIL

Collaboration? This new approach requires retailers, brands, operators, developers and investors to engage with Embracing Collaborative Retail, creating mixed-use projects that enrich their environments, enhance their locations and create a profitable and sustainable future. Our industry's revival relies on us pulling together and rebuilding with each other.

**HOW BRANDS & RETAILERS MUST
RETHINK THEIR COLLABORATIVE
MODELS TO SUCCEED?**

**WHY COLLABORATION IS CRUCIAL
FOR RETAIL PROPERTY PLAYERS TO
REBUILD THE INDUSTRY?**

#2 THE NEW RETAIL AGE

To succeed and prosper in the new retail age, retailers and brands must rethink their business models, productions, their use of physical and digital assets and how they create new customer experiences. The understanding of new consumer expectations and habits will redefine the future.

#3 ETHICAL & SUSTAINABLE

But these changes will have to be executed in a sustainable way. Investment, development and consumer priorities all require that new and redeveloped assets must be sustainable, ethical, reflect and meet local production and community needs. Technology and digital innovation will be at the heart of many of these new business models.

LIFESTYLE DESTINATIONS TO SERVE CUSTOMERS

THE RISING IMPORTANCE OF SUSTAINIBILITY TO THE COMMERCIAL REAL ESTATE

#4 LIFESTYLE DESTINATIONS

This changes everything in the retail environment. Shopping centres are transforming into wide-ranging, mixed-use lifestyle destinations and densifying their footplates to accommodate leisure, F&B, work spaces, residential, healthcare and well-being and even logistics. Entertainment will play a key role in shaping the future of retail. More than that, however, we have witnessed the incredible enthusiasm of the industry to learn, share and embrace new ideas around experience.

CONFERENCE & CONTENT STRATEGY: 2020 TRENDS

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RETAIL

SUSTAINABILITY
STORES NETWORK (RE)STRUCTURATION
DIGITAL NATIVE BRANDS & E-COMMERCE
STOCKS, PRODUCTION & SUPPLY-CHAIN
RENTAL RETAIL
LOCAL RETAIL
NEW OPERATING MODELS
LOGISTICS

CUSTOMER-CENTRIC

CUSTOMER EXPERIENCE
CONSUMER NEEDS
NEW USES
RESPONSIBLE & COLLABORATIVE ECONOMY
NEW SERVICES
HUMAN
SECOND HAND MARKET

EMBRACING COLLABORATIVE RETAIL

INNOVATION

SHARING ECONOMY
SUSTAINABILITY
AUTOMATED STORE
CONNECTED SHOPPING
AI, VISUAL & FACIAL RECOGNITION
DATA / CRM
LOGISTICS

CITIES & URBAN DEVELOPMENTS

SUSTAINABILITY
MIXED-USE & ICONIC PLACES
CONVENIENCE RETAIL
COMMUNITY HUBS
THE NEW OCCUPANCY
SHIFTING CITY

Upgrade MAPIC 2020 conference programme



3 DAY PROGRAMME

Tuesday	17 nov
Wednesday	18 nov
Thursday	19 nov



TO REINFORCE MAPIC AS AN INTERNATIONAL EDUCATIONAL PLATFORM

- Conference sessions
- Pitching sessions
- Dedicated workshops

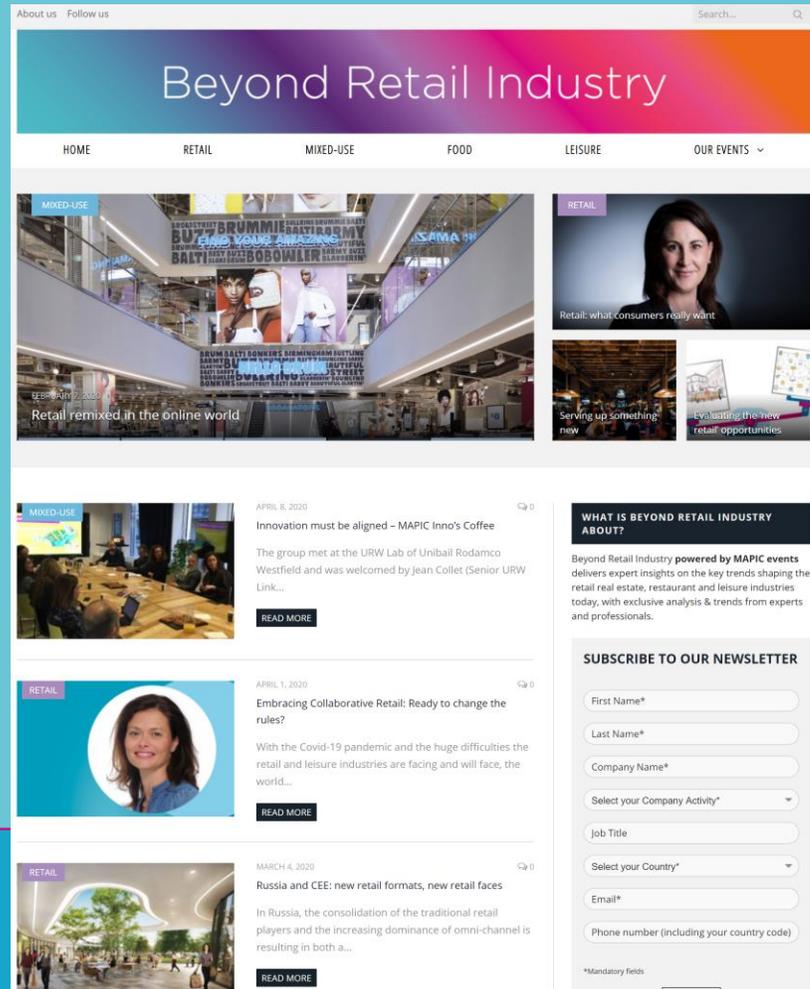


INCLUDING NETWORKING & CLOSEDOOR EVENTS

- INTERNATIONAL OUTLET SUMMIT
- MULTI-UNIT FRANCHISE SUMMIT
- MAYOR SUMMIT

CONFERENCE & CONTENT STRATEGY

Building a content marketing strategy



NEW RETAIL REAL ESTATE BLOG
REDEFINE PRINT PUBLICATIONS' GOALS
CREATE SYNERGIES PRINT - DIGITAL CONTENT

AN INTENSIVE CONTENT STRATEGY
MAPIC PUBLICATIONS ALL YEAR LONG

WHITE PAPERS
INTERVIEWS
EXCLUSIVE REPORTS
ARTICLES

- Acquisition**
- Educational angle
- Engagement**
- from conferences program content
- Retention**
- Research oriented (premium)
 - Blog as a service



MARKETING STRATEGIC PLAN

BRAND AWARENESS

(event that moves with the times)

- Social Advocacy
- All year long marketing campaigns
- MAPIC Awards as a communication pillar
- New strategic partnerships (new targets touchpoints)

ACQUISITION

(Focus on below targets)

- Retailers from new retail mix
- E-retailers and DNVB
- Retail real estate innovation
- Logistic
- Public authorities

RETENTION

(Focus on below targets)

- First Timers
- Strategic accounts

Focus on RETAILER's CUSTOMER JOURNEY

- Before
- After Registration
- Onsite
- After the show

ENGAGEMENT

- Communication and education to use the Online Database
- Onsite networking (matchmaking data)

CUSTOMER KNOWLEDGE

(digital behavior & analytics, surveys, phone interviews, sales team insights => PERSONA)

3. COMMERCIAL STRATEGY

Focus on the value proposition!

A unique industry brokerage platform

Buyers recruitment

- **2600** retailers attending!
 - 30 retailer desks sold
 - 3 day non stop retailers pitching
 - Retailer Area including a retailers Lounge
-
- **1400** investors

MATCHMAKING

Sustain key exhibitors

- Maintain our international dimension
- Organise key exhibitor account 1to1 meetings
- Introduce our matchmaking tools with buyers: on-line & on-site

Insist and valorize our strengths

3 great zones to maintain our competitive advantage by being a step beyond

- MAPIC Innovation Forum

The only show where Innovation & retail real estate stakeholders can meet!

- OUTLET ZONE

The only show gathering the international outlet community with a specific content offer!

- RETAILERS AREA

The only show with such a number of retailers attending!

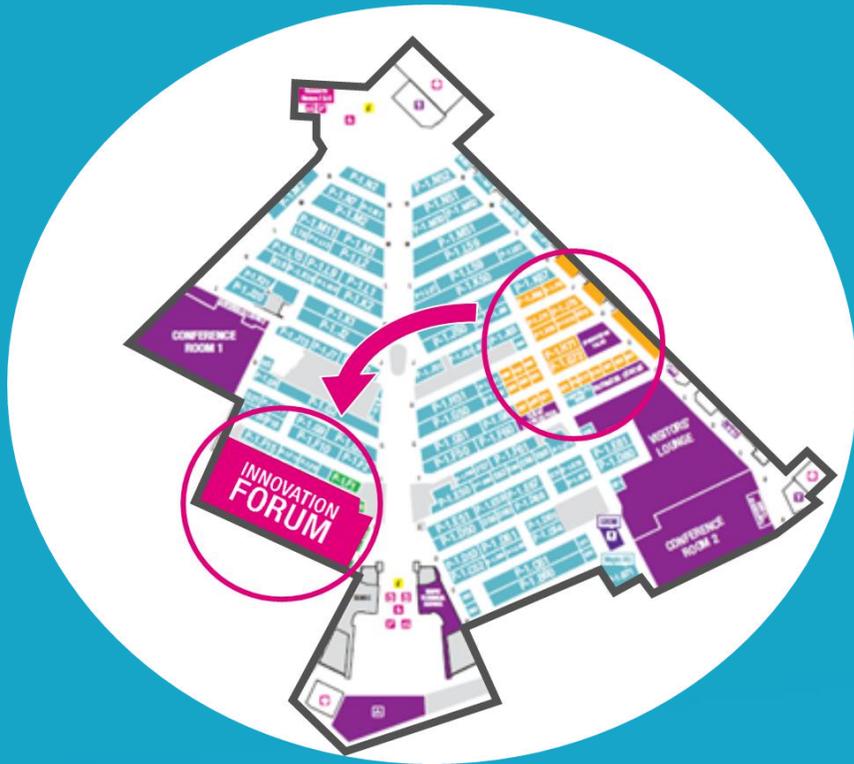


MAPIC Innovation forum

The only show where Innovation & retail real estate stakeholders can meet!



NEW LOCATION



Guided Tours



NEW Startup Jungle

OBJ : 18 startup desks



Demo Automated Store on the parvis



INNOVATION STAGE

6 curated sessions (77 ppl / workshop 2019)
+ pitching sessions



INNOVATION STAGE TO ACCELERATE RETAIL PROPERTY PLAYERS COLLABORATION



TUESDAY 17 NOVEMBER 2020

WEDNESDAY 18 NOVEMBER 2020

THURSDAY 19 NOVEMBER 2020

10.00 - 10.15
INNOVATION EXPERT INSIGHT

10.15 - 11.00
INNOVATION LAB

11.00 - 12.00
INNOVATION FLASH TALKS
Discover the latest innovations to increase the performance of your shopping destinations!

14.30 - 14.45
INNOVATION EXPERT INSIGHT

14.45 - 15.15
PAYMENT TO ENHANCE THE SEAMLESS EXPERIENCE

15.15 - 16.15
INNOVATION FLASH TALKS
Discover the latest innovations to increase the performance of your shopping destinations!

10.00 - 10.15
INNOVATION EXPERT INSIGHT

10.15 - 11.00
AI & VOICE RECOGNITION TO ENHANCE & PERSONALISE CUSTOMER RELATIONSHIPS

11.00 - 12.00
INNOVATION FLASH TALKS
Discover the latest innovations to increase the performance of your shopping destinations!

14.30 - 14.45
INNOVATION EXPERT INSIGHT

14.45 - 15.15
AUTOMATED STORES TO ADD VALUE TO YOUR CUSTOMERS

15.15 - 16.15
INNOVATION FLASH TALKS
Discover the latest innovations to increase the performance of your shopping destinations!

11.00 - 11.15
INNOVATION EXPERT INSIGHT

11.15 - 11.45
BE CONNECTED!

11.45 - 12.45
INNOVATION FLASH TALKS
Discover the latest innovations to increase the performance of your shopping destinations!

14.30 - 14.45
INNOVATION EXPERT INSIGHT

14.45 - 15.30
COLLABORATIVE RETAIL IN A DATA WORLD

15.30 - 16.15
INNOVATION FLASH TALKS
Discover the latest innovations to increase the performance of your shopping destinations!

4th edition of the OUTLET Summit



A dedicated closed-door event

New venue: Salon des Ambassadeurs, Level 4 (TBC)

Tuesday 17 November - afternoon

300 participants expected

3 hours of conferences & networking-oriented moments

- ✓ **keynote address**
- ✓ **CEOs panel session**
- ✓ **round table discussions led by sponsors**
- ✓ **outlet projects presentations powered by MAPIC Awards,....)**
- ✓ **outlet happy hours**

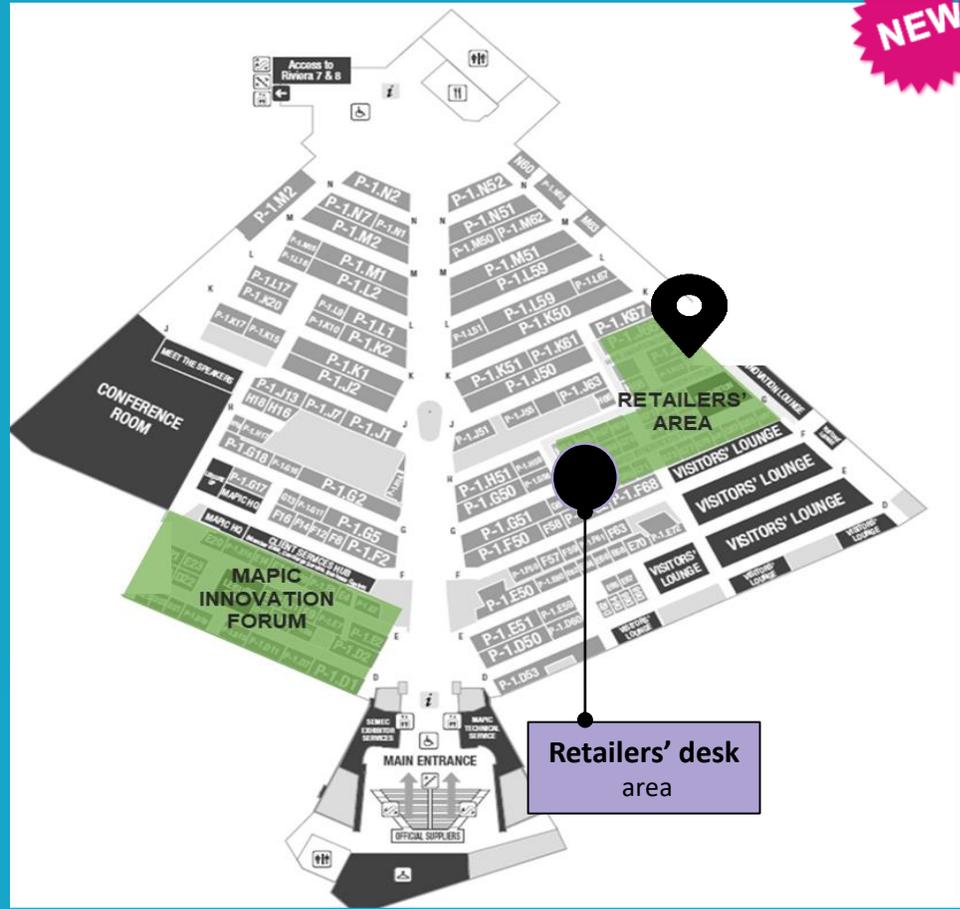


Retailers at the heart of MAPIC

The only show with 2600 retailers attending!



MEET RETAILERS AT THEIR DESK!



Key retailers invitations



30 retailers desks

€2,000



Retail Talks



E-tailers in spotlight



Brand showcase

€5,000



Master Franchise Summit



RETAILERS STAGE TO REINFORCE RETAIL AT THE HEART OF THE SHOW



TUESDAY 17 NOVEMBER 2020

10.00 - 10.15
RETAIL EXPERT INSIGHT

10.15 - 11.00
HOW TO DEVELOP AND (RE)STRUCTURE RETAIL CHAINS?

11.00 - 12.00
RETAIL FLASH TALKS
Spot & connect with international in-vogue

14.30 - 14.45
RETAIL EXPERT INSIGHT

14.45 - 15.30
URBAN FORMATS & SHOPPING EXPERIENCES: SHAPING RETAIL TO KEEP UP WITH CONSUMERS

15.30 - 16.30
RETAIL FLASH TALKS
Spot & connect with international in-vogue retailers, new brands & DNVBs!

WEDNESDAY 18 NOVEMBER 2020

10.00 - 10.15
RETAIL EXPERT INSIGHT

10.15 - 11.00
WHICH FORMAT BEST SUITS YOUR BRAND?

11.00 - 12.00
RETAIL FLASH TALKS
Spot & connect with international in-vogue

14.30 - 14.45
RETAIL EXPERT INSIGHT

14.45 - 15.30
FROM STORES TO STORIES

15.30 - 16.30
RETAIL FLASH TALKS
Spot & connect with international in-vogue retailers, new brands & DNVBs!

THURSDAY 19 NOVEMBER 2020

11.00 - 11.15
RETAIL EXPERT INSIGHT

11.15 - 12.00
HOW SUSTAINABILITY IN RETAIL IS CHANGING THE FUTURE OF COMMERCE?

14.30 - 15.30
RETAIL FLASH TALKS
Spot & connect with international in-vogue retailers, new brands & DNVBs!

Next steps

1. Launch of the communication all channels

Early May

2. Webinar launch on Innovation

Mid of May

3. On-site security tools to prepare the venue in November

On going

A decorative graphic in the bottom right corner consisting of a grid of small, semi-transparent squares in various colors like blue, green, and purple.

THANK YOU !

mapic®

June 3rd Q&A

LIVE on Teams 😊

Send your questions to Oriane:
Oriane.caulet@reedmidem.com