

Unplugged Moderated Session:
A Reemergence Playbook for Marketers

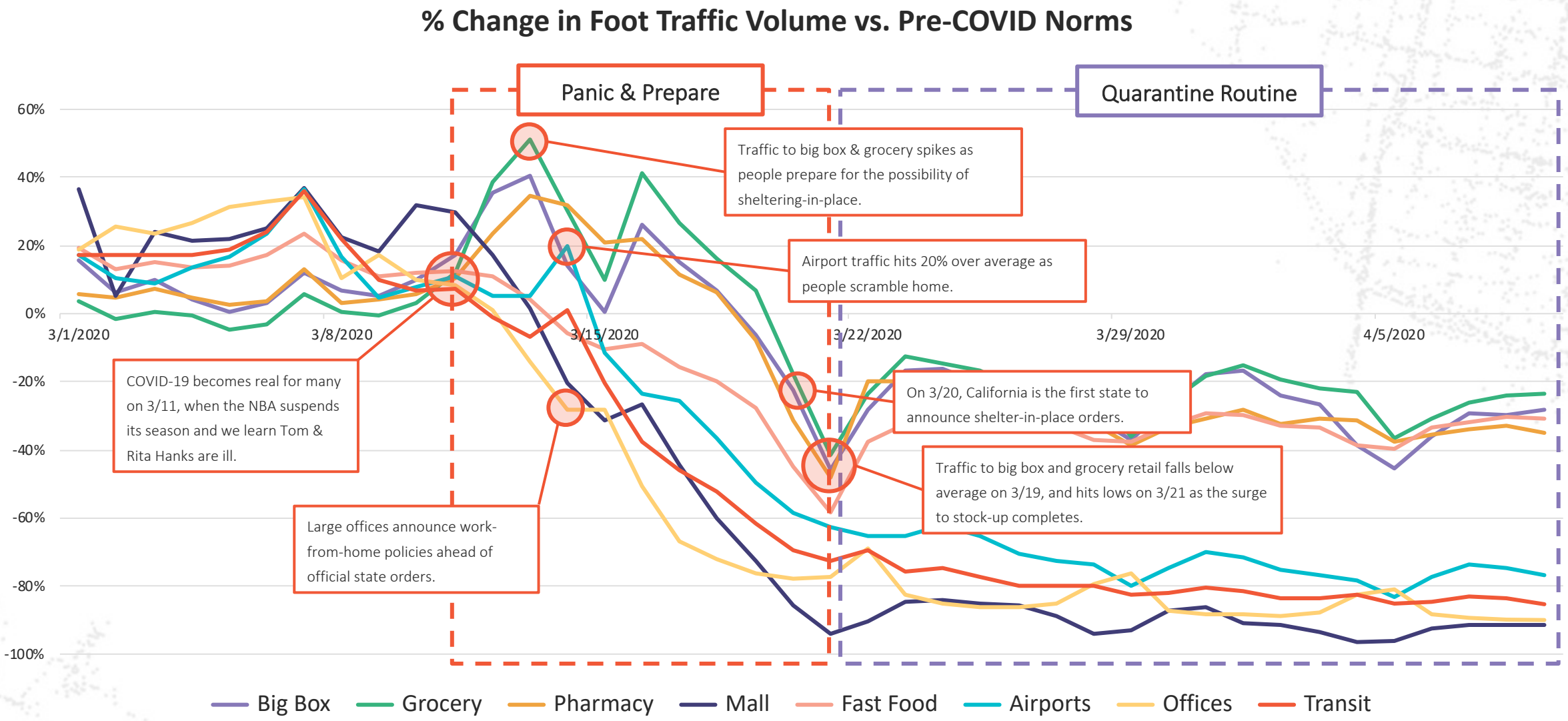
June 9, 2020

PlaceIQ — Confidential and Proprietary 2020

Social Distance Tracker Insights

HOW HAS CONSUMER BEHAVIOR CHANGED DURING COVID-19?

WE SHELTERED IN PLACE AS A NATION, FOLLOWING CULTURAL CUES



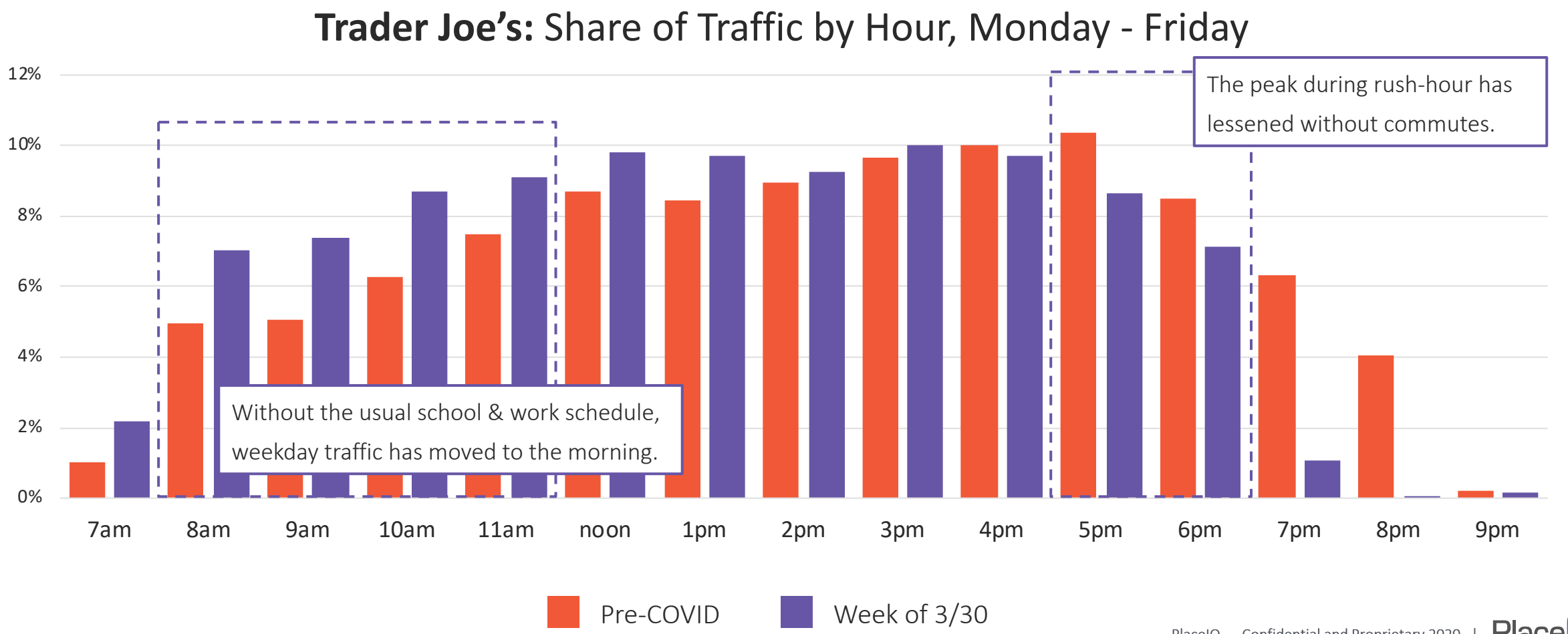
VERTICALS AND SUBCATEGORIES VARIED IN DECLINE

Category	Decline in Foot Traffic
Grocery	- 27%
Big Box	- 34%
Fast Food	- 34%
Pharmacy	- 34%
Auto Dealerships	- 43%
Coffee Shops	- 52%
Fast Casual Dining	- 58%
Nature & Outdoors	- 60%
Airports	- 77%
Casual Dining	- 77%

April 15, 2020

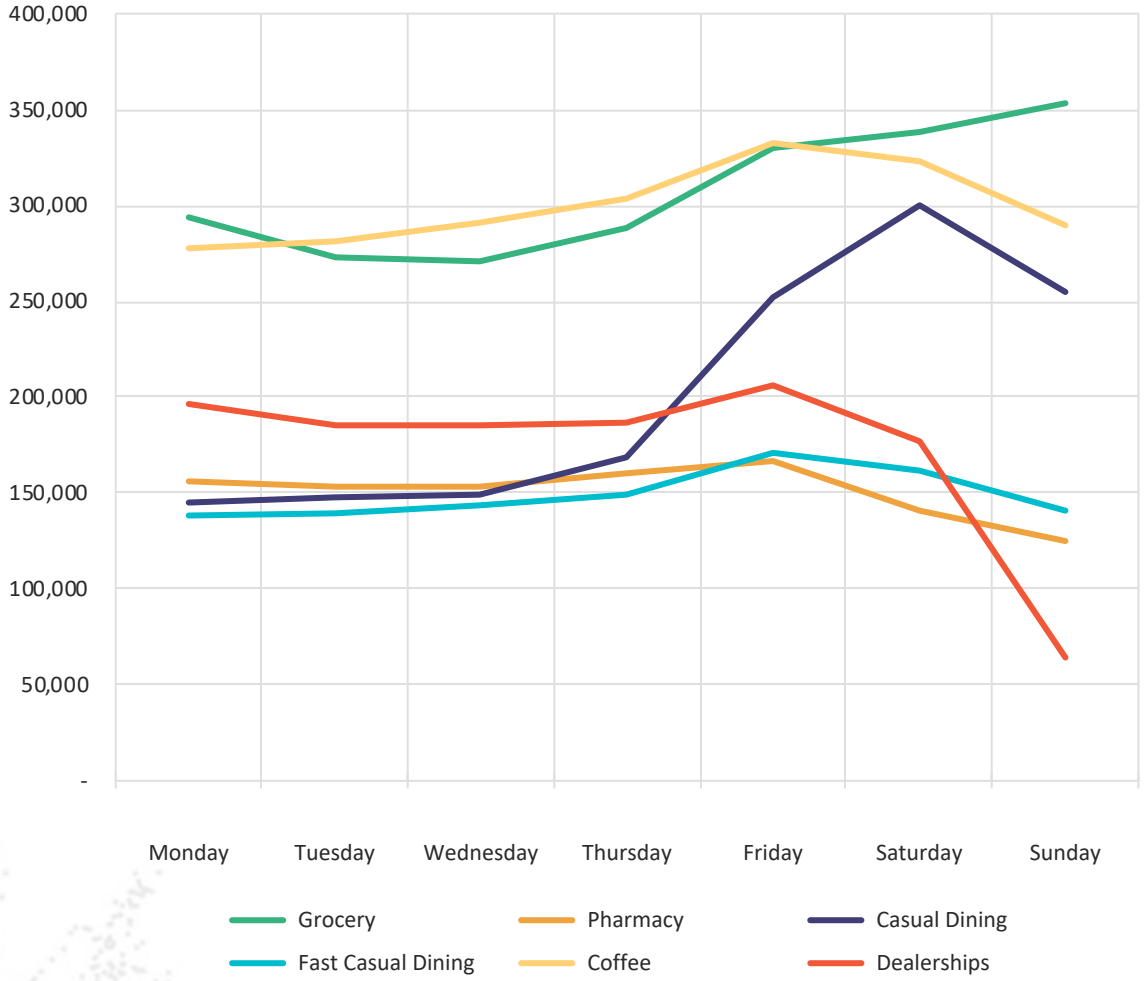
ACTIVITIES LIKE GROCERY SHOPPING OCCURRED EQUALLY THROUGHOUT THE DAY

With less schedule constraints, **visits are more evenly distributed.**

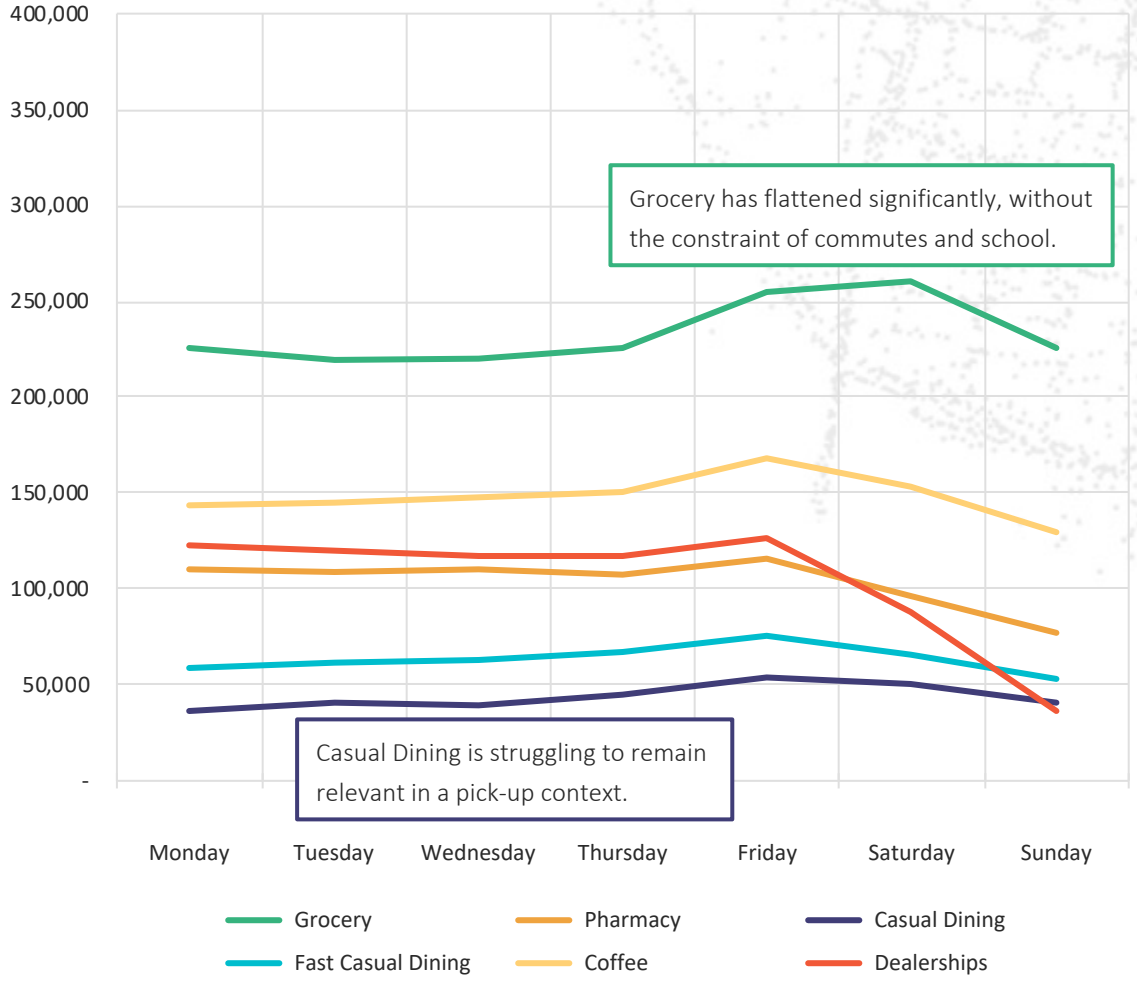


OUR WEEKLY ROUTINE BECAME FLAT

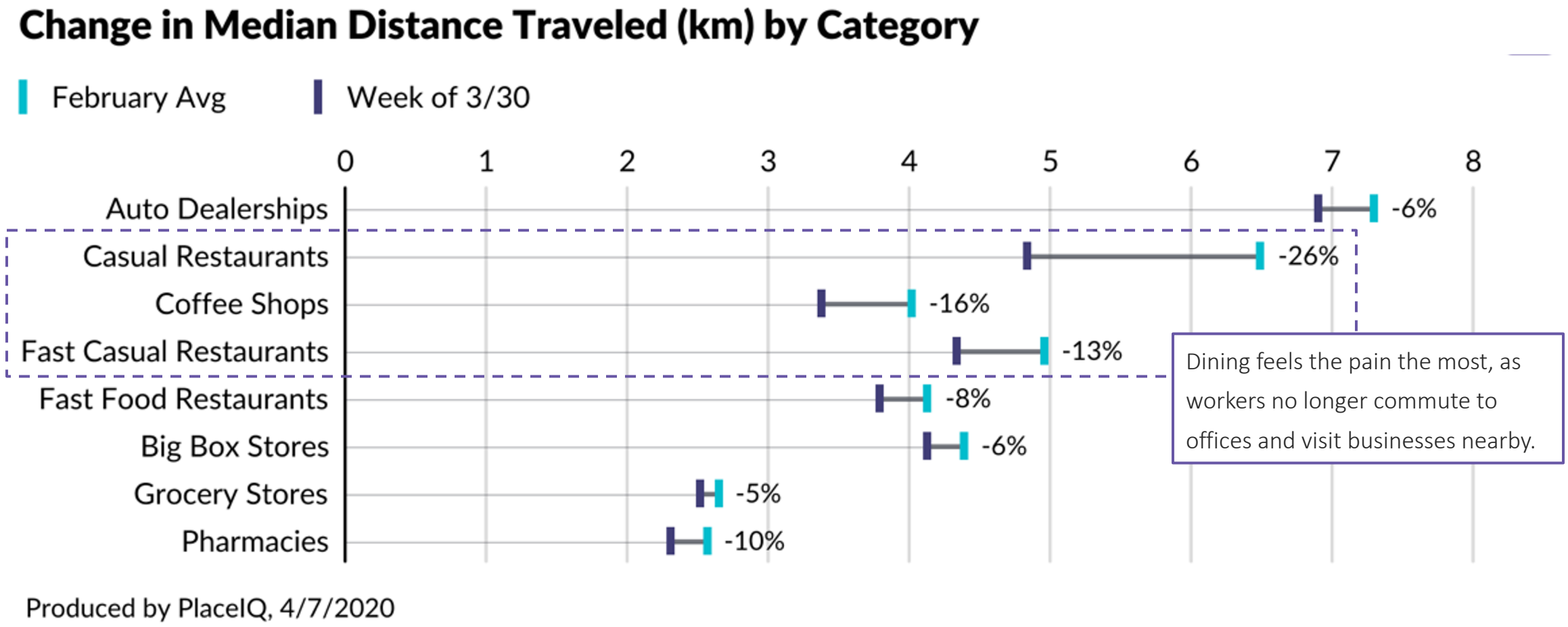
The Pre-COVID Weekday Foot Traffic Routine



The Shelter-in-Place Foot Traffic Routine



PEOPLE DROVE LESS, STAYING MOSTLY WITHIN 3 MI FROM HOME

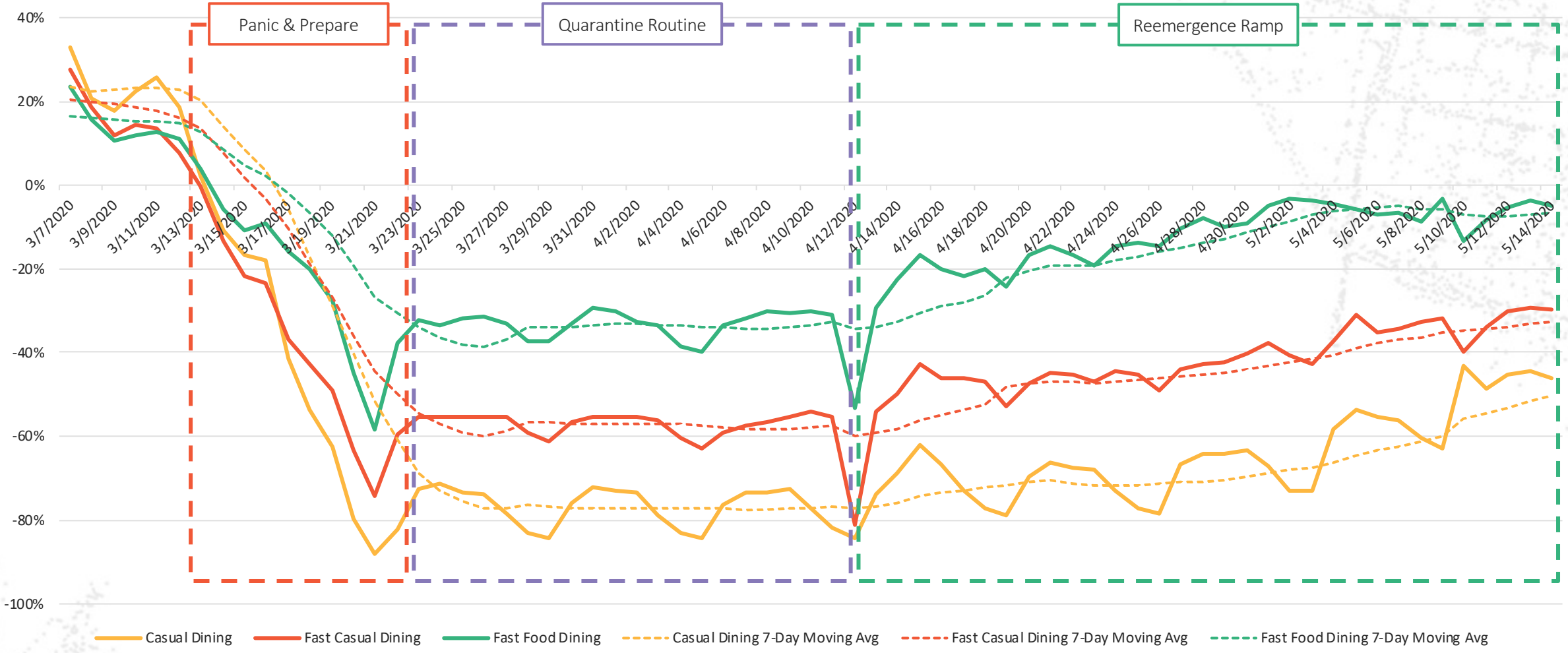


The Next Phase of Social Distancing

FOOT TRAFFIC IS RETURNING, BUT IT VARIES BY REGION

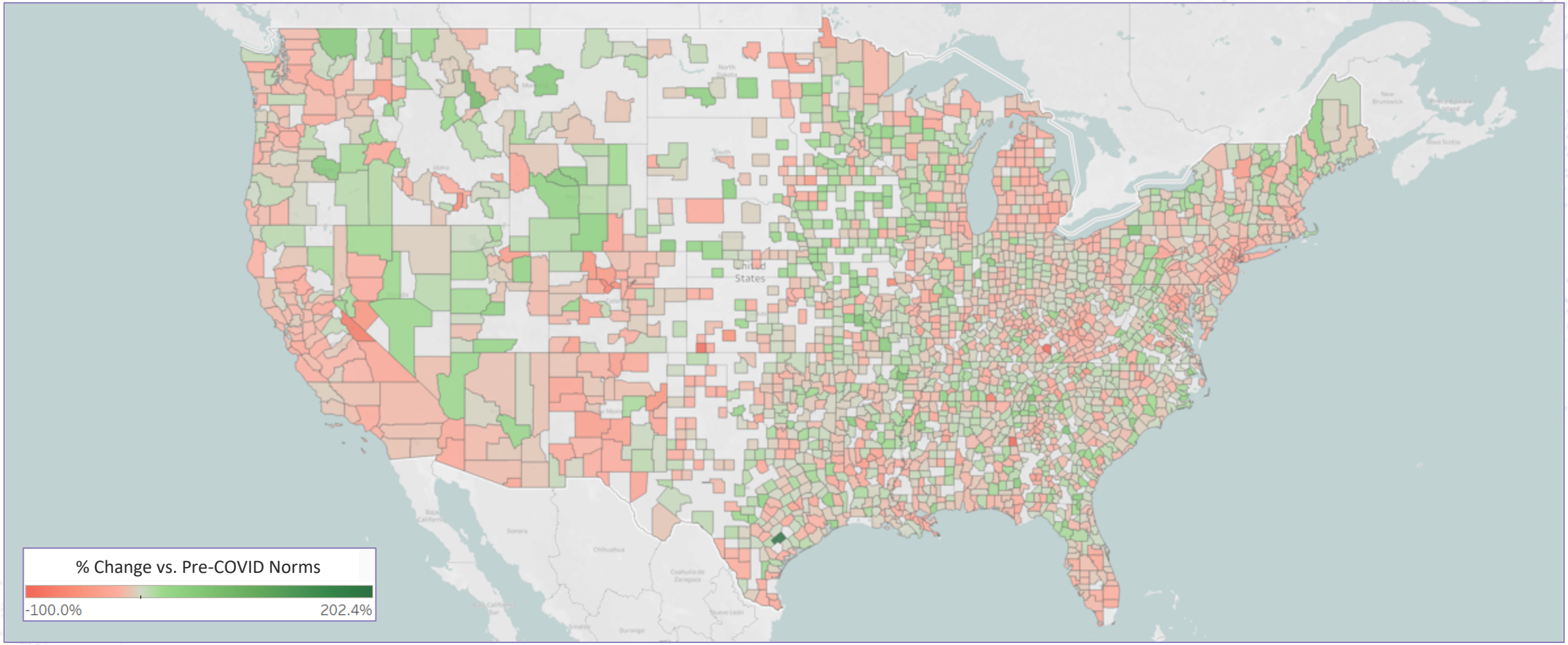
REEMERGENCE IS OCCURRING BEFORE REOPENING

Change in Foot Traffic to Restaurants vs Pre-COVID Norms



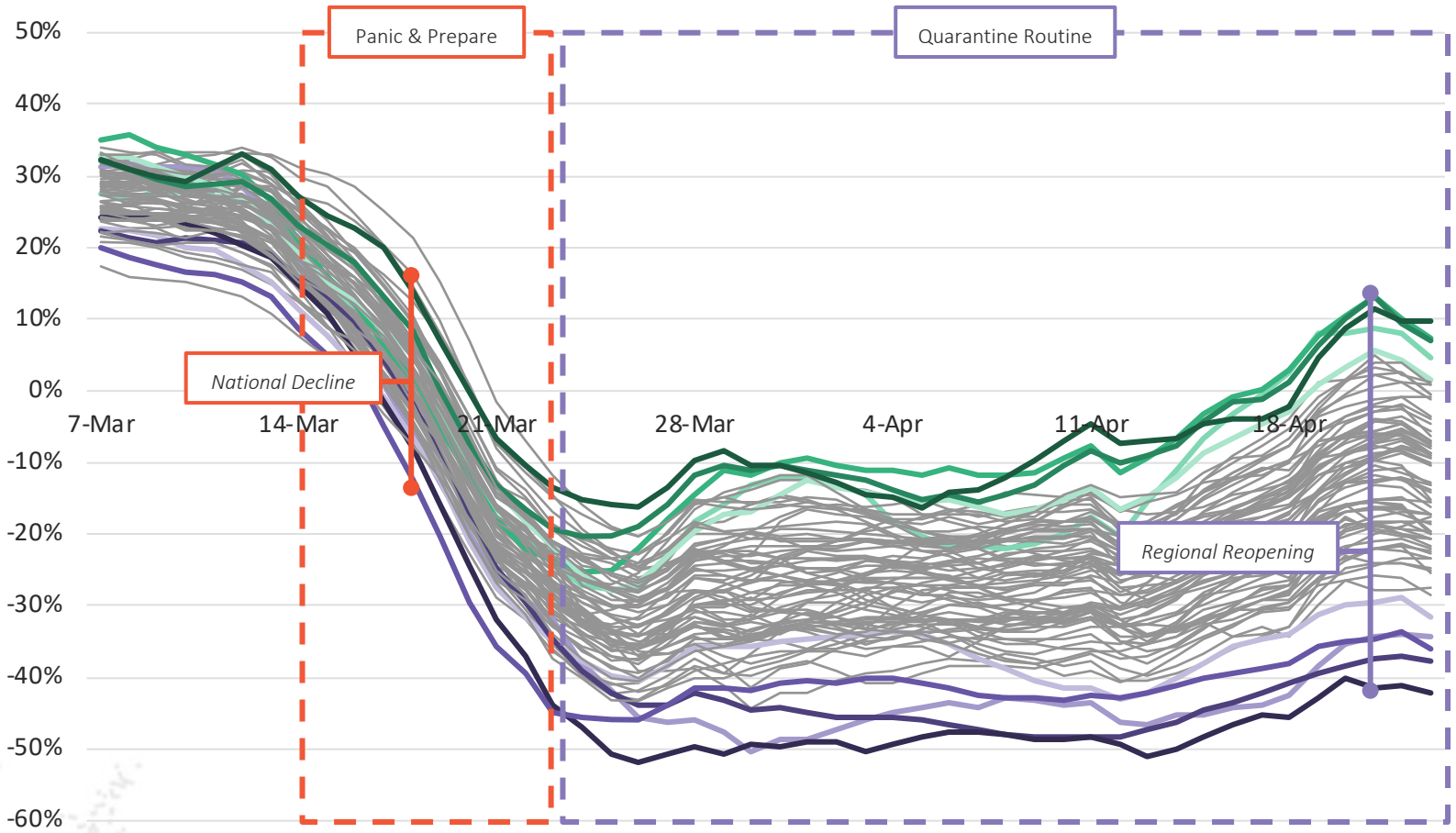
REEMERGENCE IS INCREDIBLY VARIED FROM COUNTY TO COUNTY

In What Counties is McDonald's Foot Traffic Reemergent?



WE'RE REEMERGING AS REGIONS, EACH ON OUR OWN SCHEDULE

% Change in Foot Traffic Volume to Fast Food Dining vs. Pre-COVID Norms, by DMA, 7-Day Moving Average



Market Area	Change vs. Pre-COVID
Wichita, KS	+ 10%
Little Rock, AR	+ 7%
Tulsa, OK	+ 7%
Chattanooga, TN	+ 5%
Memphis, TN	+ 1%

Market Area	Change vs. Pre-COVID
Los Angeles, CA	- 32%
Detroit, MI	- 34%
San Francisco, CA	- 36%
Miami, FL	- 38%
New York, NY	- 42%

Reemergence Playbook

EFFECTIVELY MARKETING IN REGIONAL RECOVERY

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CHALLENGES FACING MARKETERS

“Reopening” and “Reemergence” are Different and Don’t Always Align

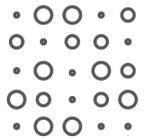
- Official orders, “reopening”, has little impact on a community’s desire to leave the house to visit businesses, “reemergence.”
- Changing rules in Georgia and Texas did little to spur people back to stores.

Reemergence is Regional in Nature

- Gains in foot traffic vary widely by county and category, creating a complex environment of diverse behaviors.
- Rural communities are more likely to be out and about, but local economies, politics, infection rates, and perceived risk drive different behaviors.

IMPLEMENTING TACTICS FOR REEMERGENCE

To overcome the challenge of local complexities created by regional recovery, use tools which wrap nuanced, local data into easily used products.



Monitor

- See where reemergence is occurring – by county, category, and brand
- Track changes to individual venues with daily data



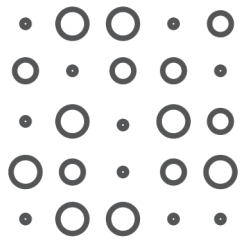
Segment

- Easily target regions and households by how much they're reemerging
- Build and discover segments in Audience Dashboards



Measure

- Evaluate impact by campaign using Place Visit Stream
- Gauge local impact by analyzing longitudinal trends with Daily Visit Count data

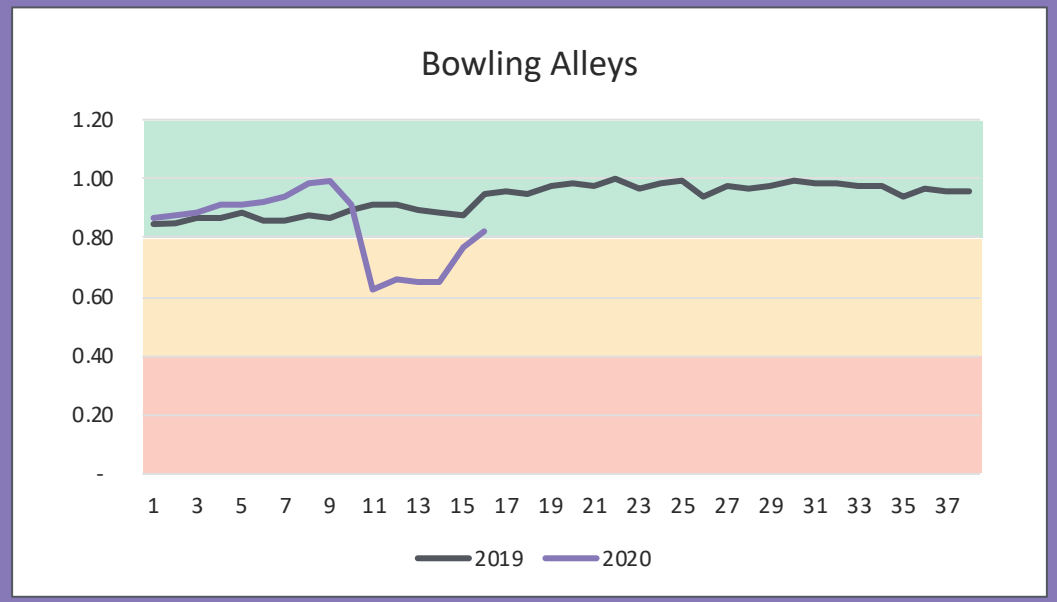


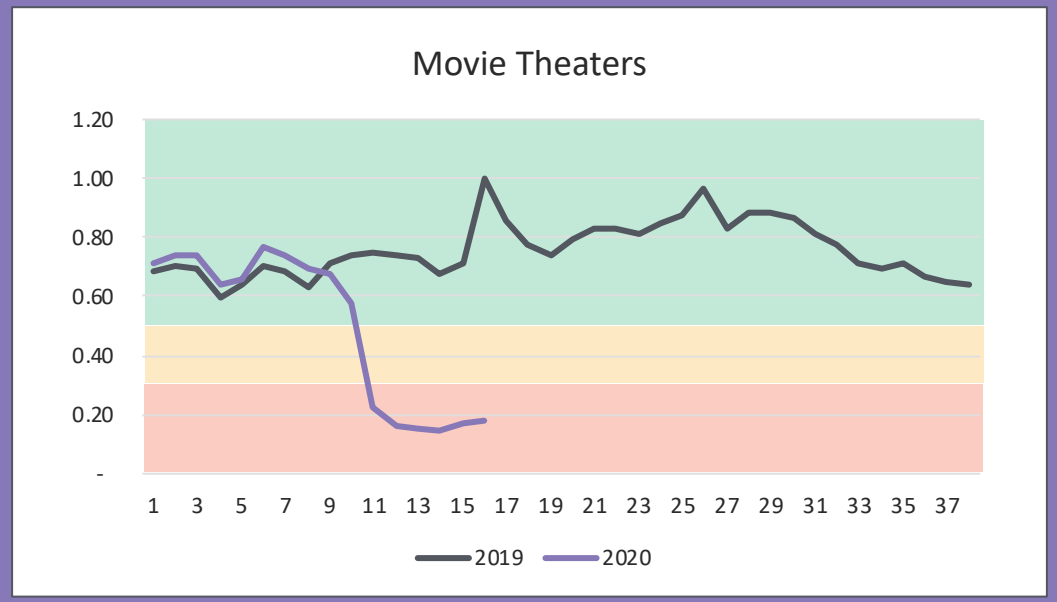
Monitor

REEMERGENCE DATASET

Track emergence and sheltering by category or brand, at the county level.

- Daily year-over-year visitation indexes
- For each US county
- At the brand or category level
- Data back to January 1st, 2020
- Available June 15th





National Example

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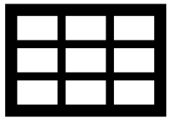
THE RIGHT MONITORING SOLUTION FOR YOUR USE CASE

Choose a data solution that is suited to your specific needs and infrastructure.



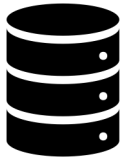
Traffic Health

- Dashboard for querying traffic to brands nationally and by DMA
- Designed for dashboard access in browser



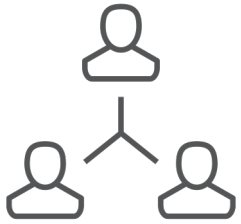
Reemergence Dataset

- Visit indices vs. 2019 at the brand/category and county level
- Designed for Excel, Tableau, and other BI tools



Daily Visit Counts

- Daily visit counts at the individual venue level
- Designed for databases and datalakes



Segment

REEMERGENT AUDIENCES

Identify and target devices & households based on their observed rate of reemergence. For example, target households which are just now increasing their number of trips out of home.



Strictly Isolating



Cautiously Reemerging



Reemerged

REEMERGENT AUDIENCES USE CASES

Reemergent Regions:

McDonald's Example

- **Sheltering Regions:** "Take a break on Takeout Tuesday!"



- **Testing Regions:** "Coffee and breakfast are still on!"



- **Emergent Regions:** "Come try out our new chicken sandwich!"





Measure

MEASURE WITH PLACE VISIT STREAM

Receive a stream of visit data to client-specified locations, matched to media exposures across channels. This enables you to conduct your own measurement with a platform you trust.

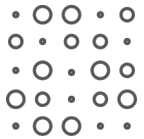
MARKETER'S BENEFITS

- ✓ Easy to implement across partner platforms
- ✓ High precision with scale and confidence
- ✓ Omnichannel measurement, including mobile, social, search, desktop, TV, and video through GCM



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