COVID-19 U.S. Social Distance Tracker

March 24, 2020

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PlaceIQ Social Distance Tracker:

OBSERVING CHANGES IN CONSUMER BEHAVIOR THROUGH THE LENS OF FOOT TRAFFIC

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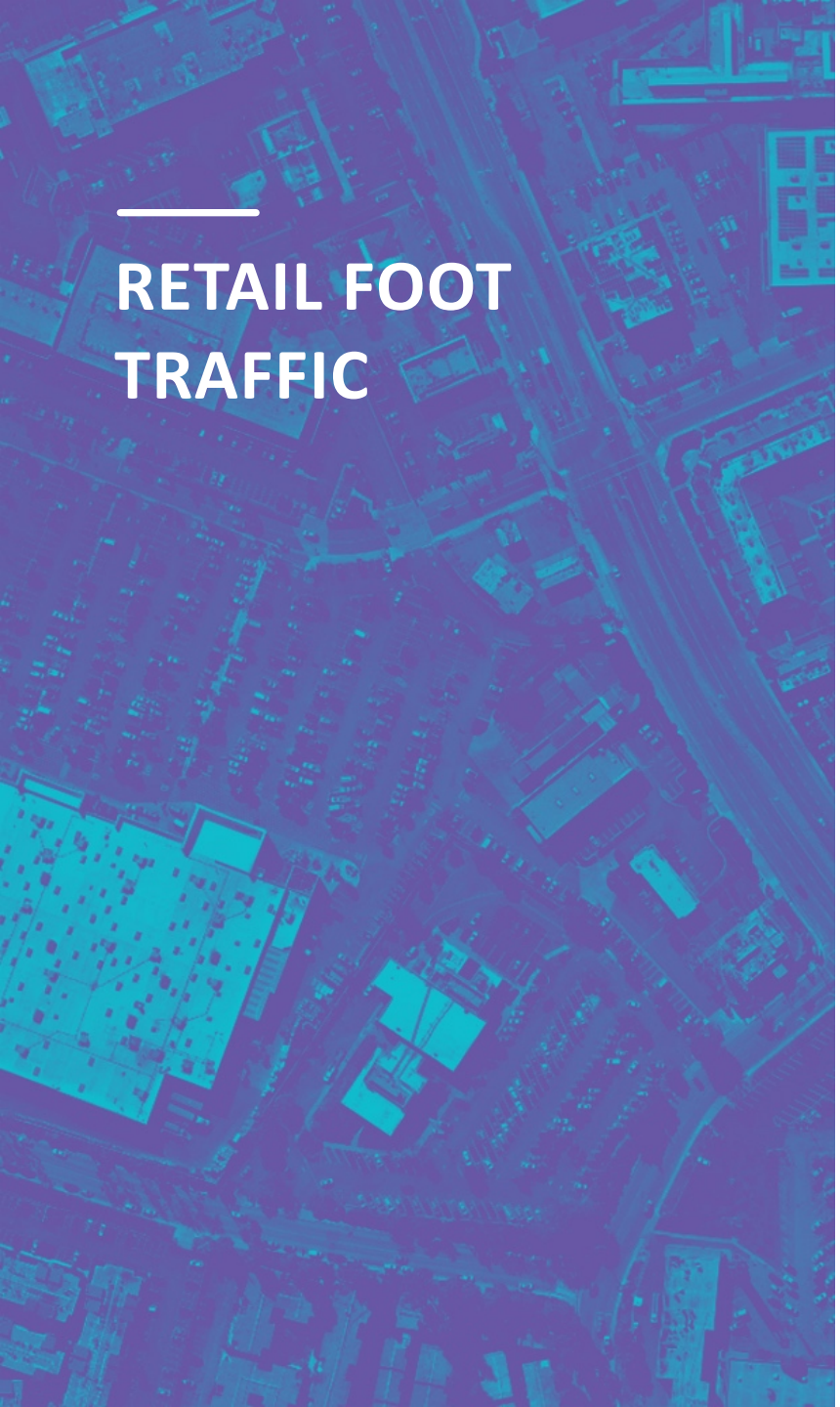
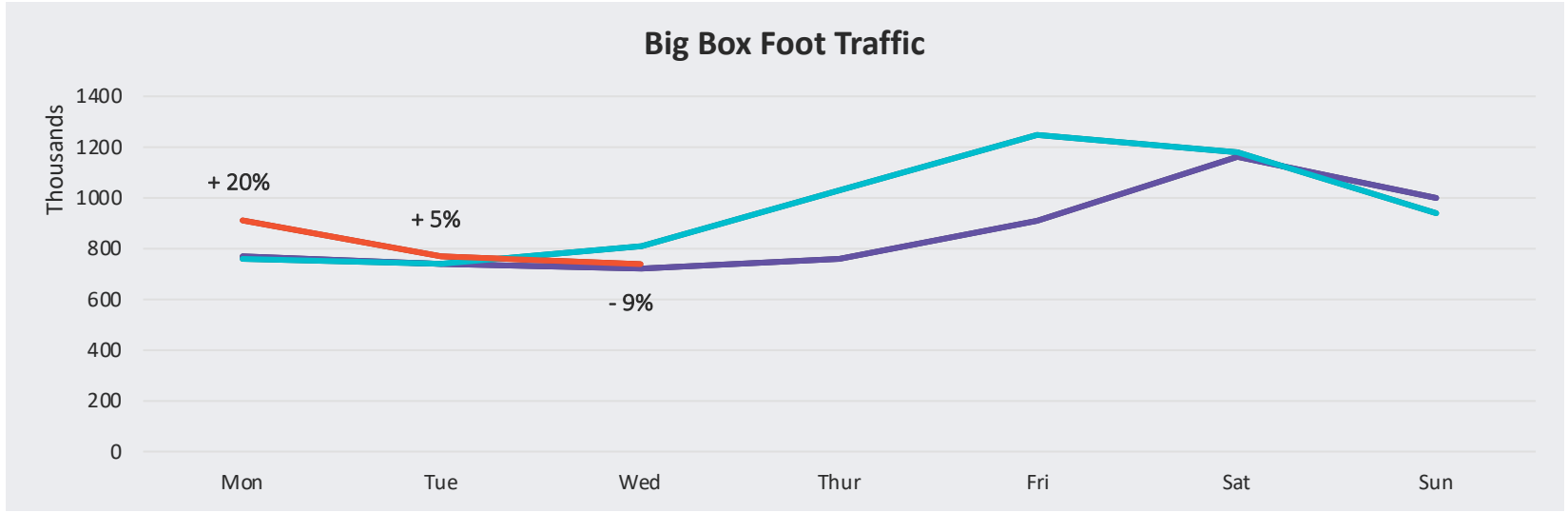


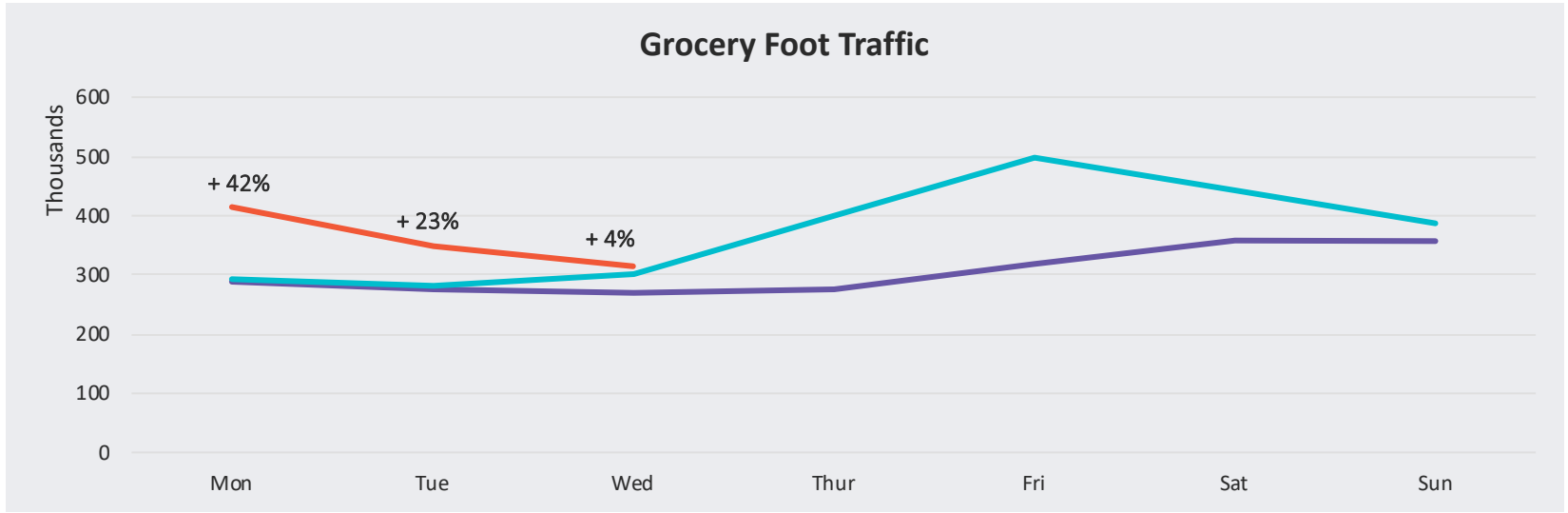
RETAIL FOOT TRAFFIC

Unsurprisingly our data confirms that, across the nation, Big Box, Grocery, and Pharmacy Retail foot traffic is up, and experienced a spike that kicked off Thursday, 3/12. The surge lasted over the weekend but is regressing back to usual volumes. We expect traffic is flattening as homes acquire sufficient supplies, supply chains take time to catch up, and more people socially isolate.

Traffic to mall retail was significantly down from its usual weekend highs the week of 3/9, but is declining more significantly the week of 3/16. We expect this trend to continue as more states issue shelter in place orders and non-essential retailers temporarily close.

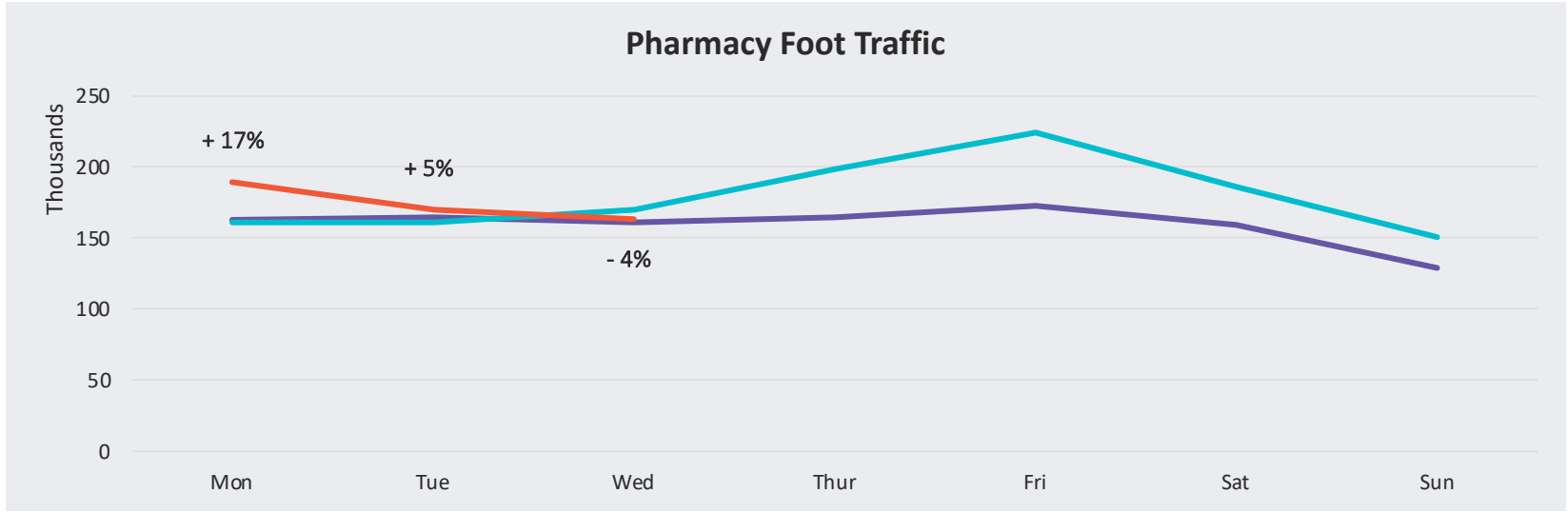
COVID-19 TRACKER:
Retail Foot Traffic

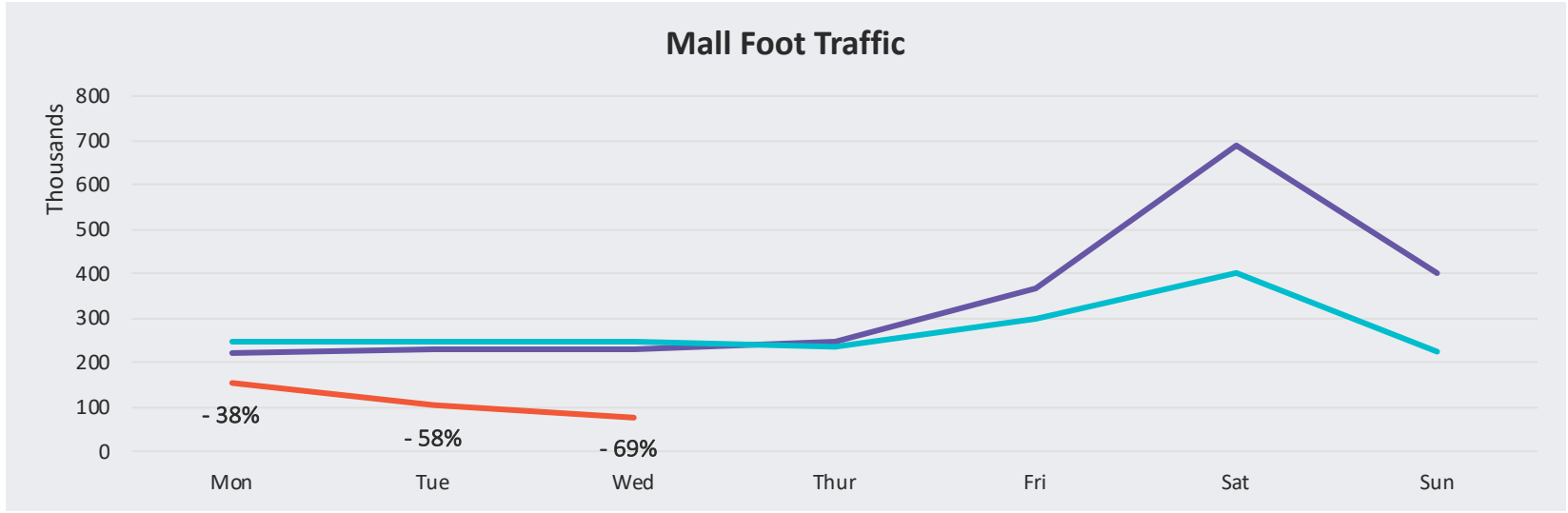




Week of 3/16 Week of 3/9 Week of 3/2

COVID-19 TRACKER:
Retail Foot Traffic Cont.





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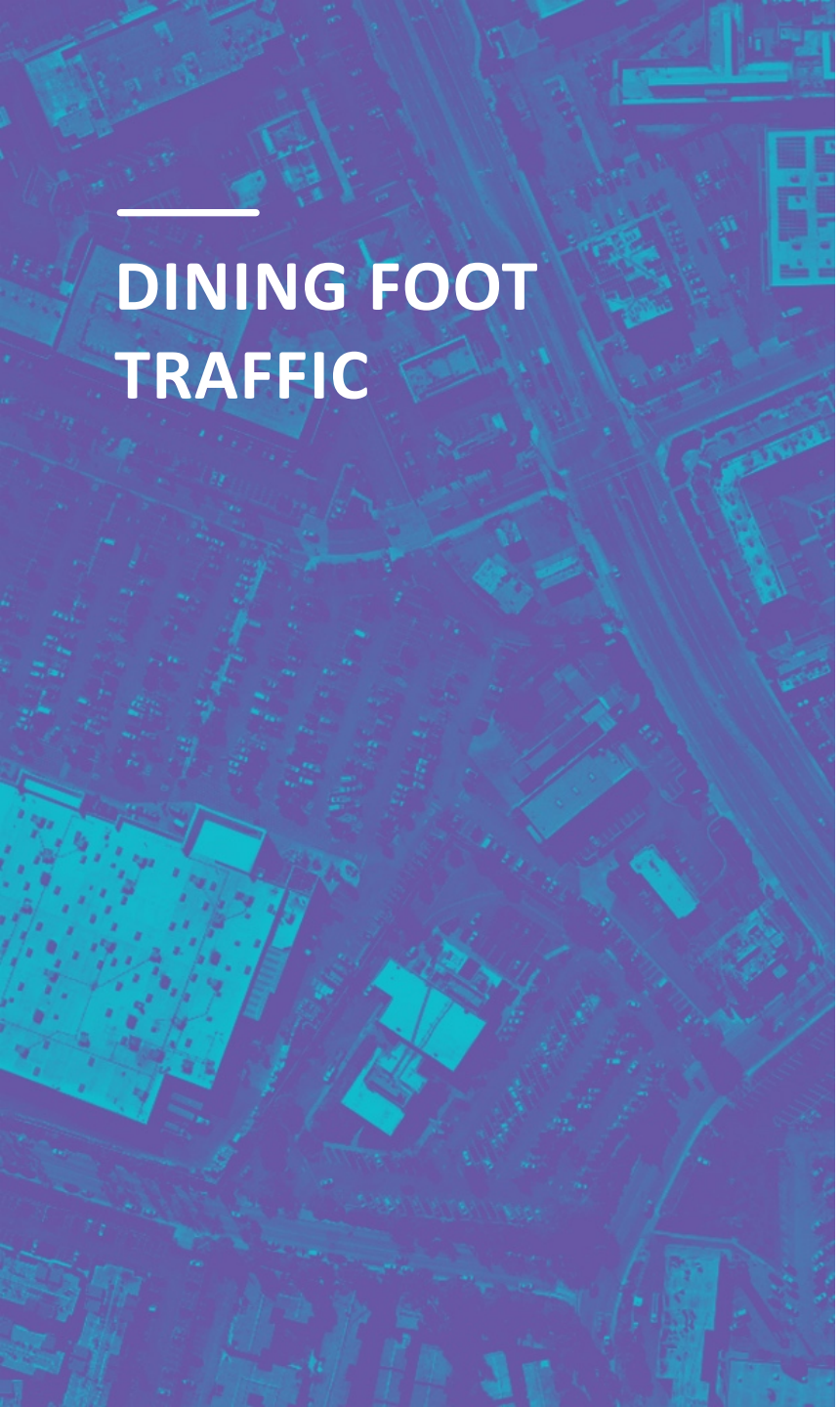
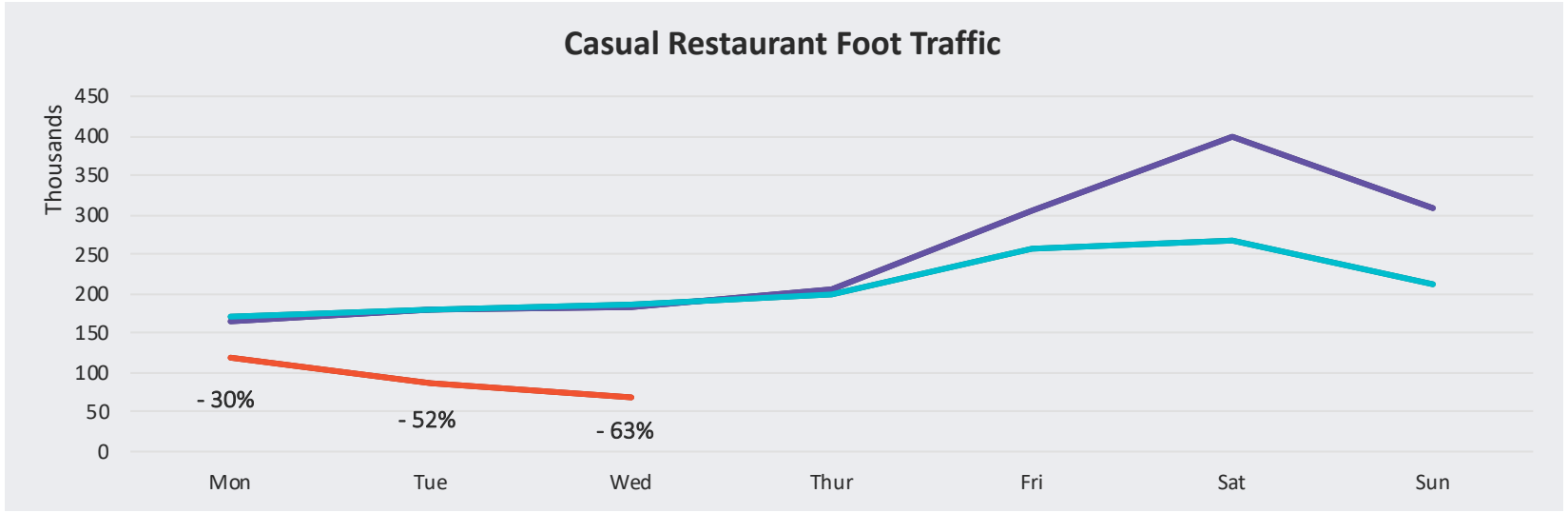


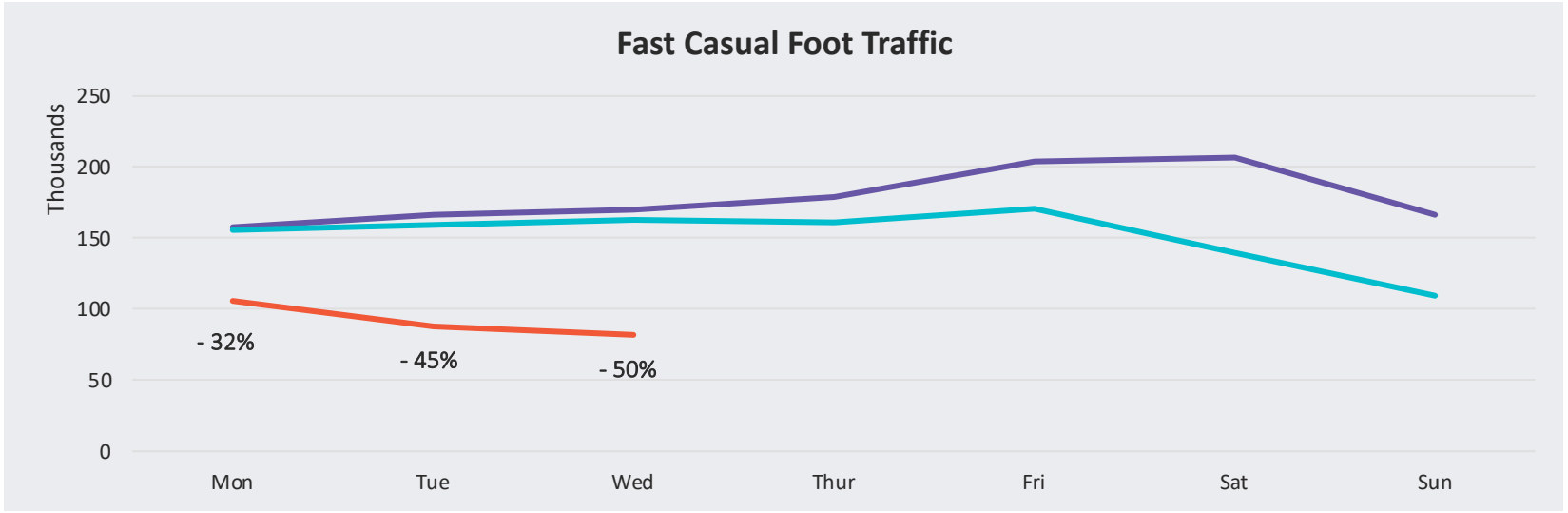
DINING FOOT TRAFFIC

A new rule of thumb is emerging in the dining sector: businesses more dependent on customers dining-in are being hit harder than those who specialize in take-out. Casual restaurants (like TGI Fridays or Applebees) are down over 60% from their usual volumes, while fast food traffic is down about 25%. Fast casual venues (like Chipotle and Panera) are down somewhere in between.

Fast casual restaurants should be set up for growth in the medium term – their menus and operations support take-out business well – but doing so will require significant customer messaging to establish new habits. In upcoming Tracker editions, we will be monitoring how pivoting to pick-up options affects traffic to these locations.

COVID-19 TRACKER:
Dining Foot Traffic





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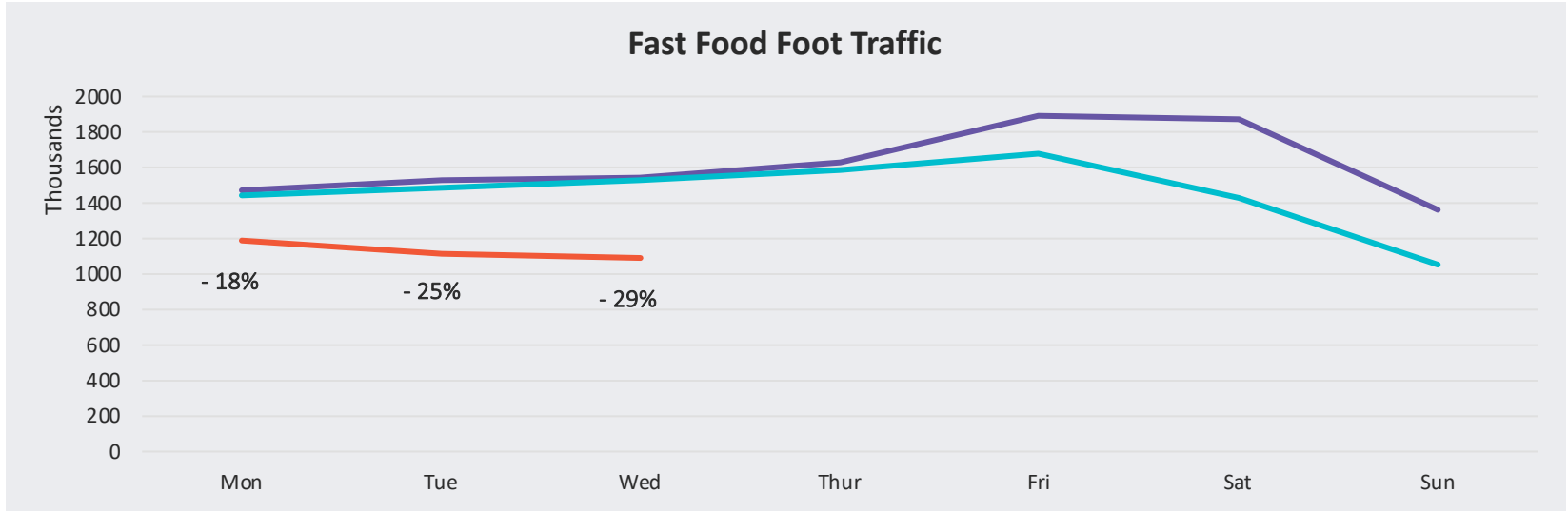
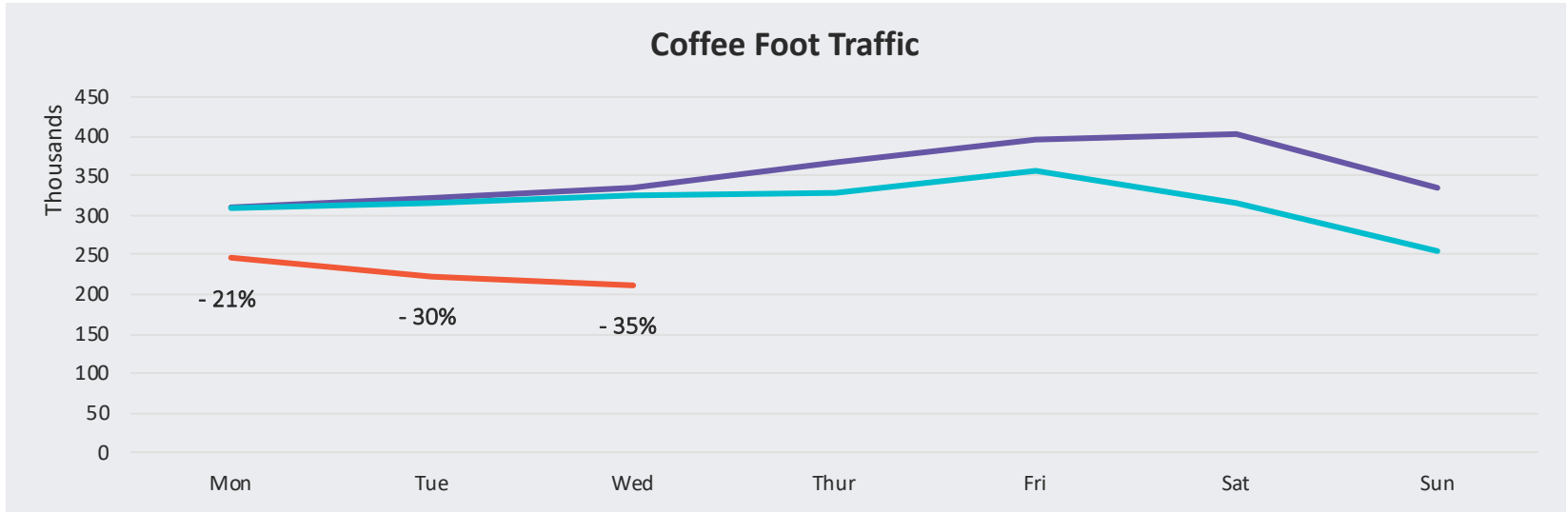
COVID-19 TRACKER:
Dining Foot Traffic Cont.





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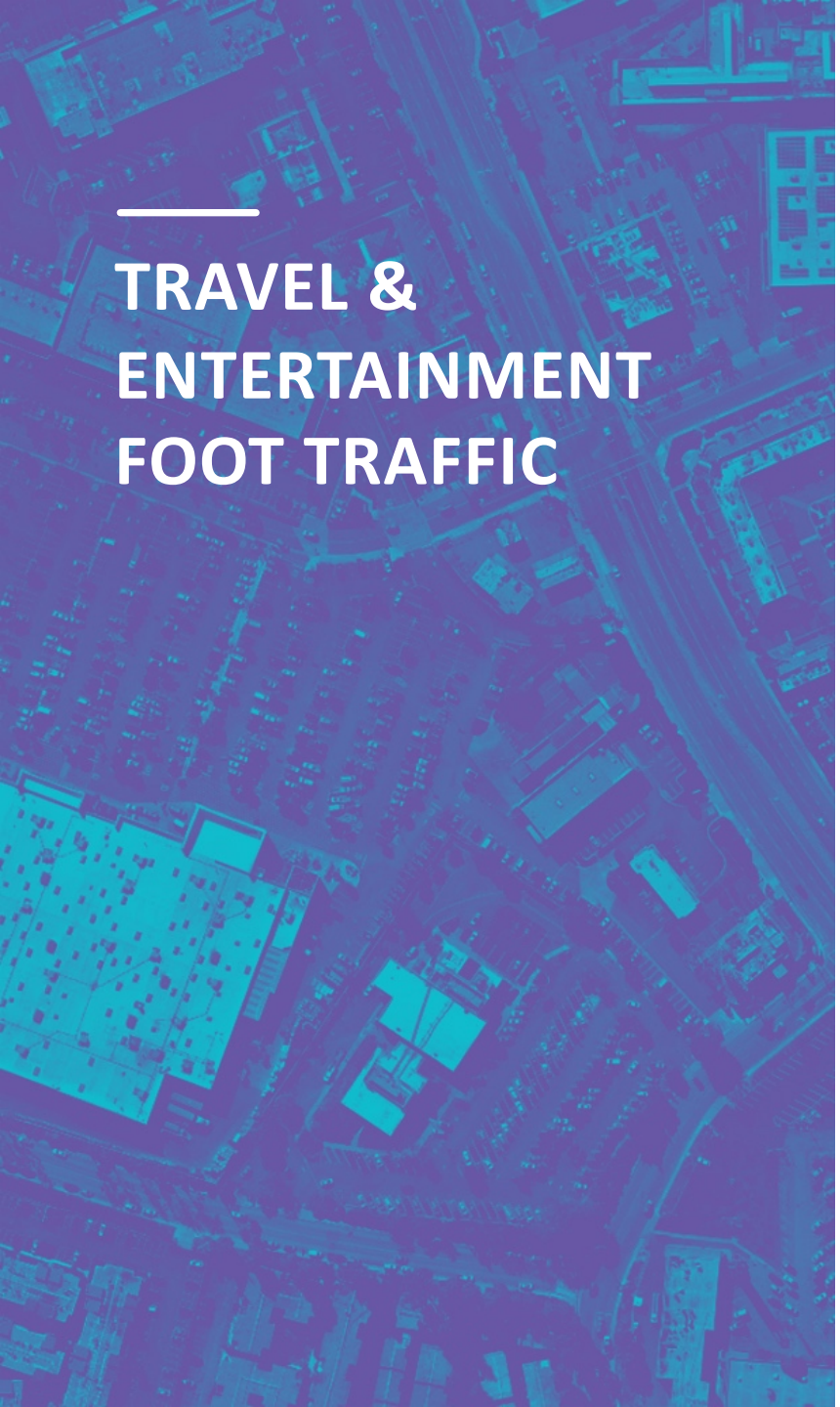
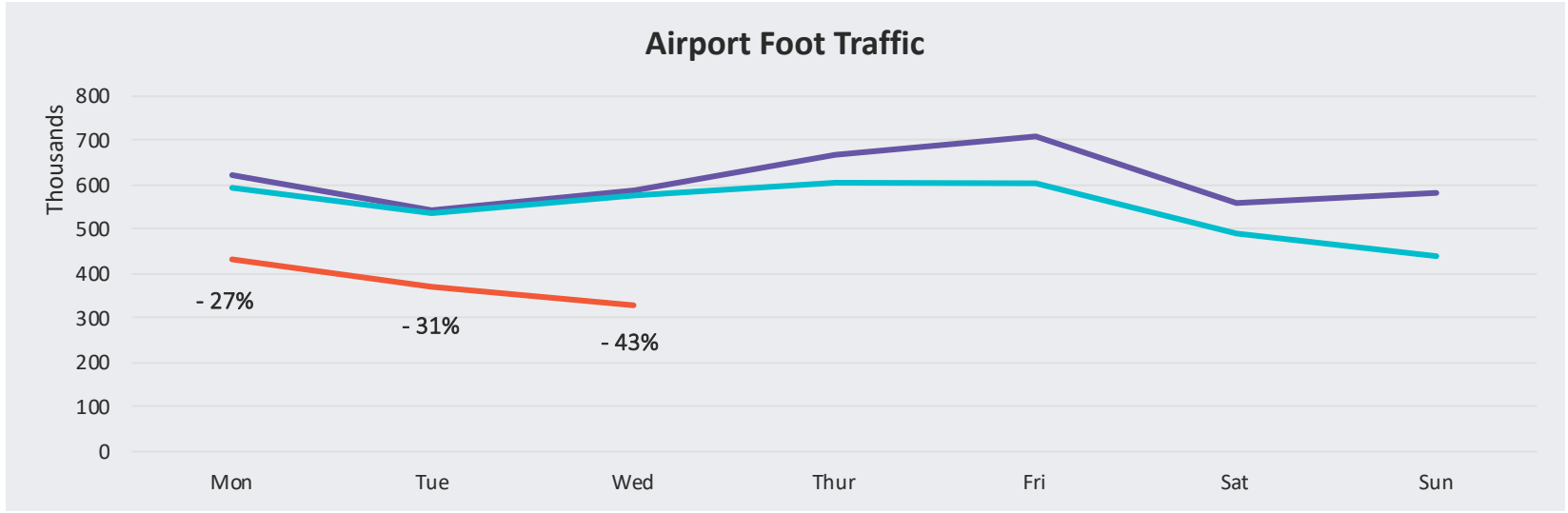


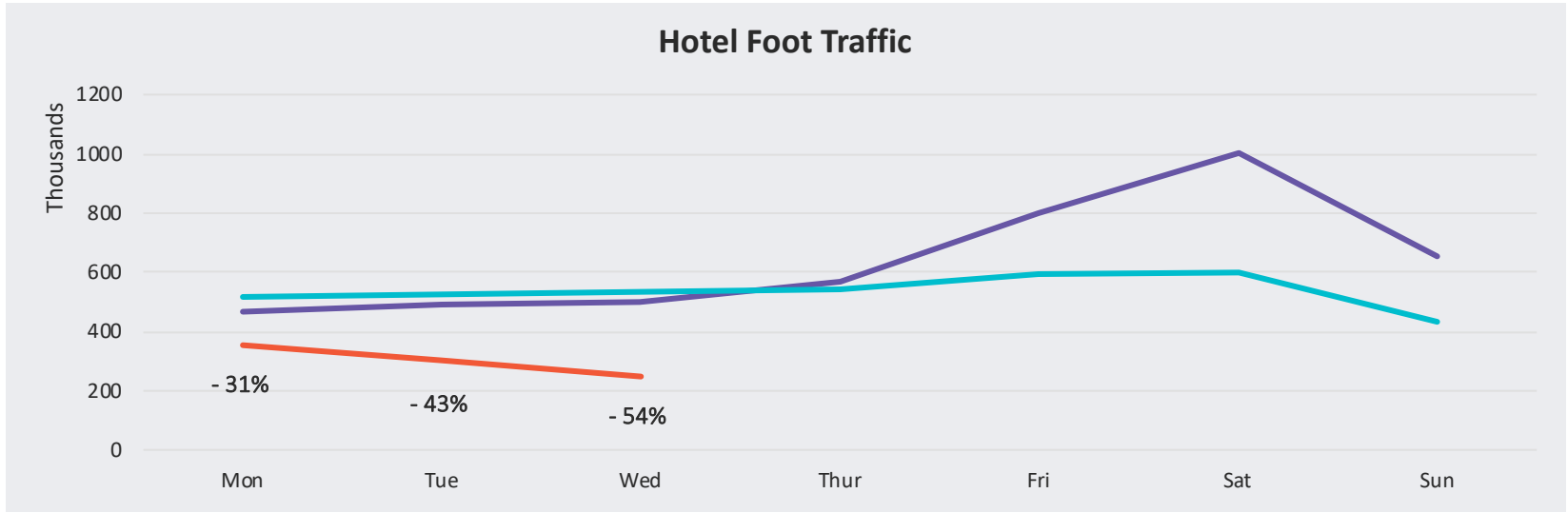
TRAVEL & ENTERTAINMENT FOOT TRAFFIC

Travel associated traffic has been on a steady decline since the week of 3/9. Airports and hotels are now off 40-50% from their norms and we expect them to fall further as more data rolls in.

Foot traffic to entertainment venues is providing a preview of where airports and hotels will likely end up. These venues fell much faster because events were canceled more widely than shelter-in-place orders were issued, resulting in an 86% drop over a single week.

COVID-19 TRACKER:
Travel & Entertainment Foot Traffic





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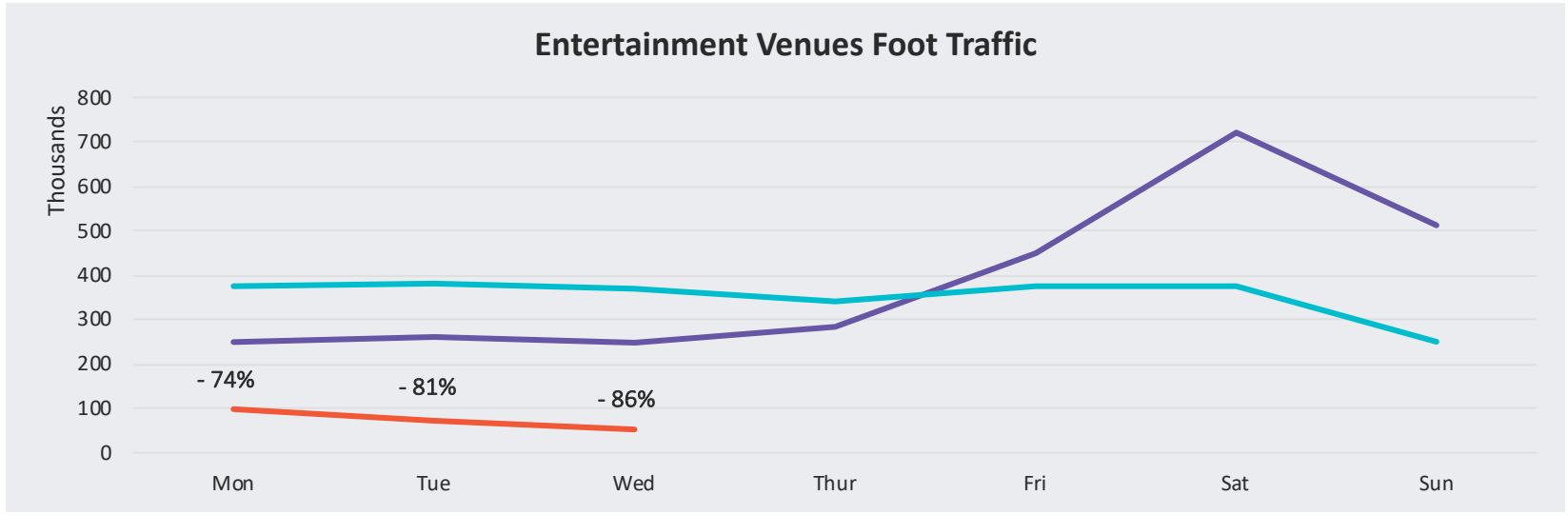

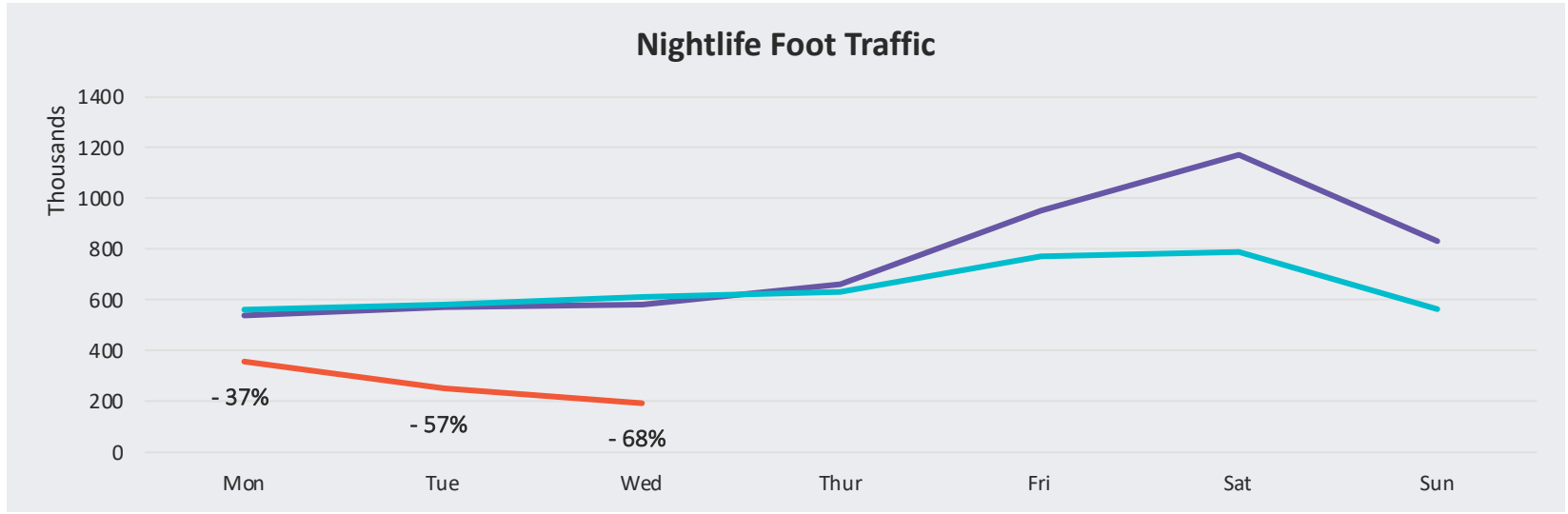

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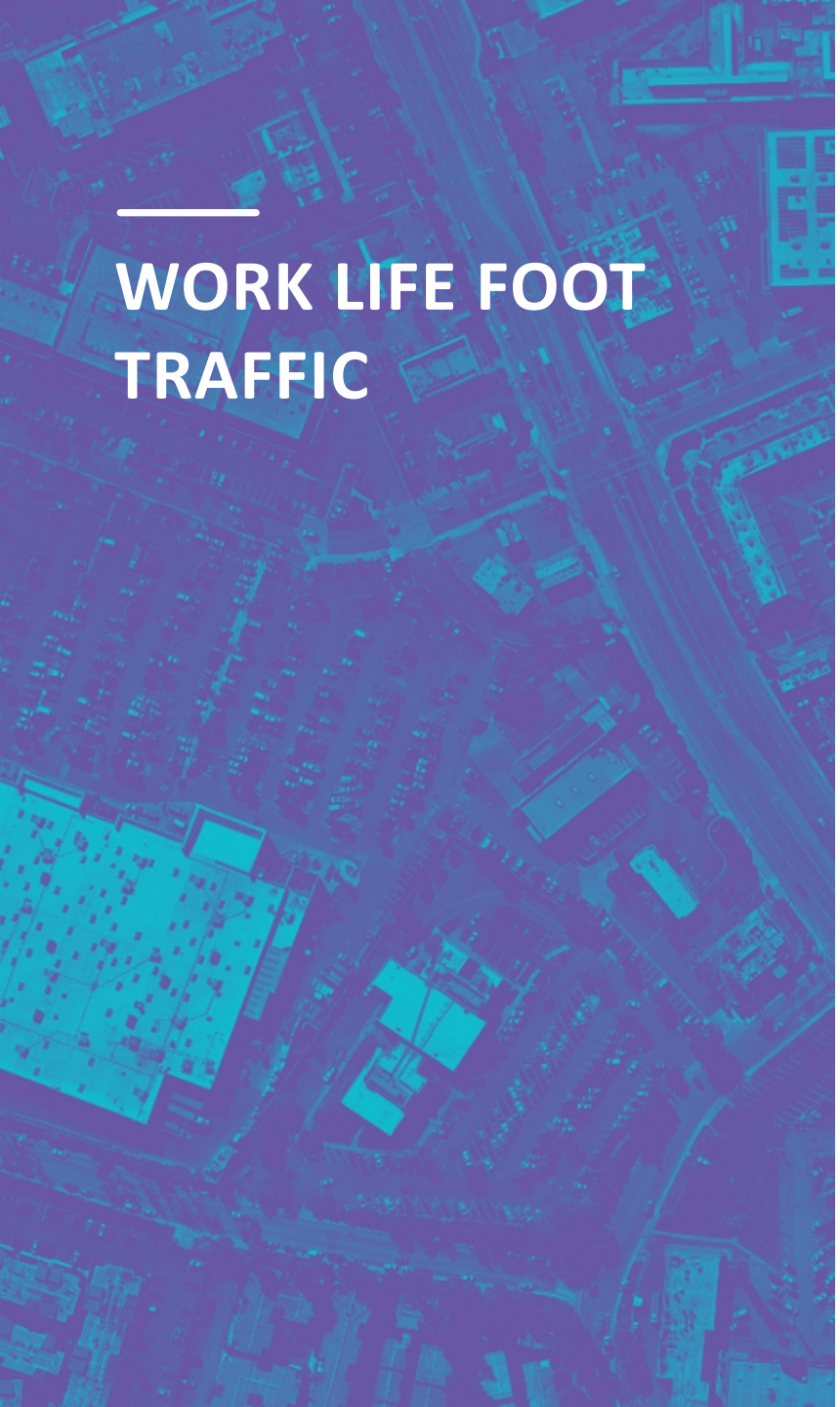

WORK LIFE FOOT TRAFFIC

Across social media and publications, we're all seeing (and soaking up) tips for working from home as office workers become remote.

Our data confirms this shift showing workplace traffic is nearly at usual *weekend* levels. In our next email, we fully expect to be below weekend norms.

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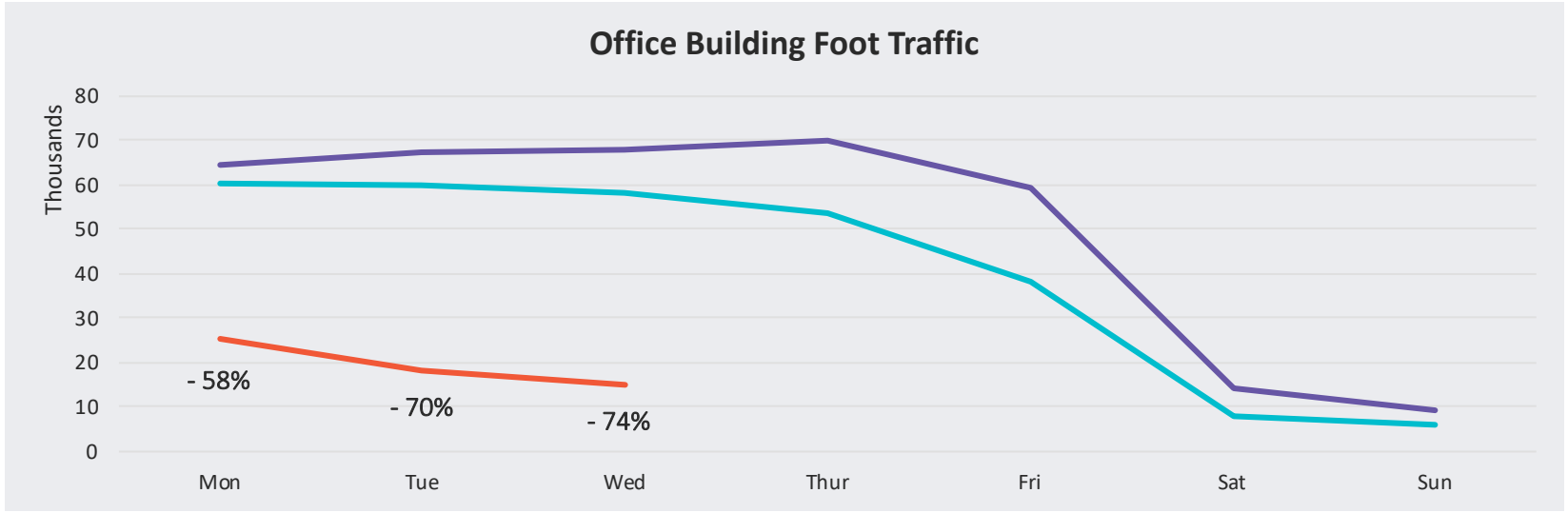
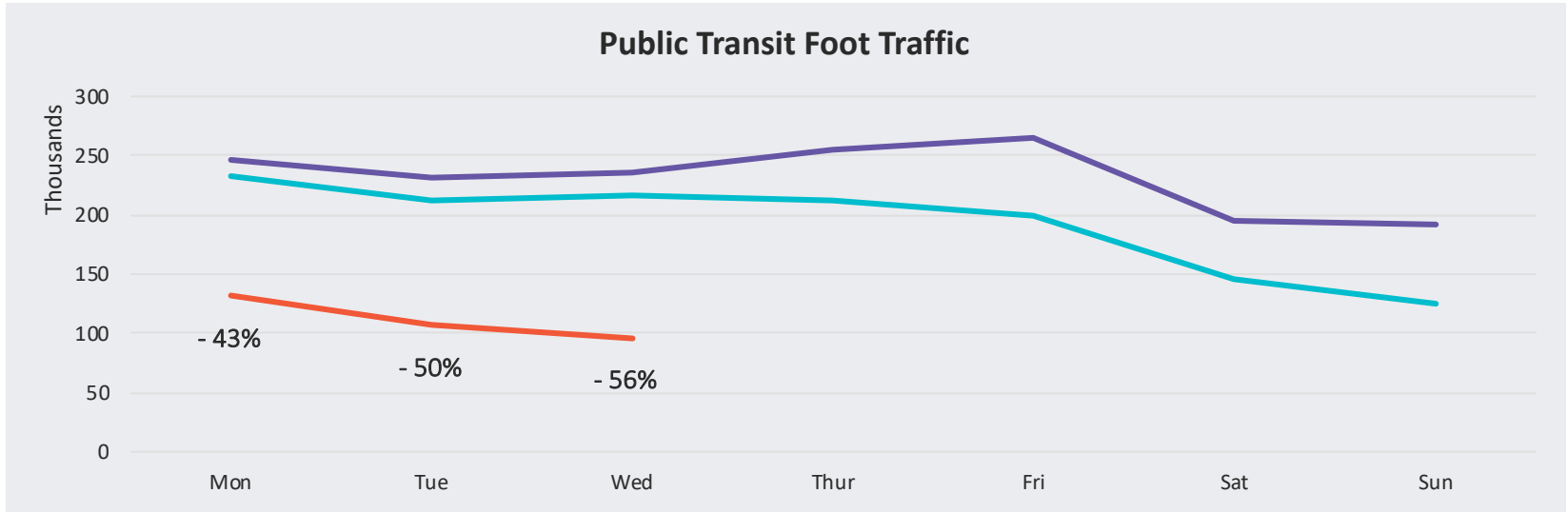
Work Life Foot Traffic





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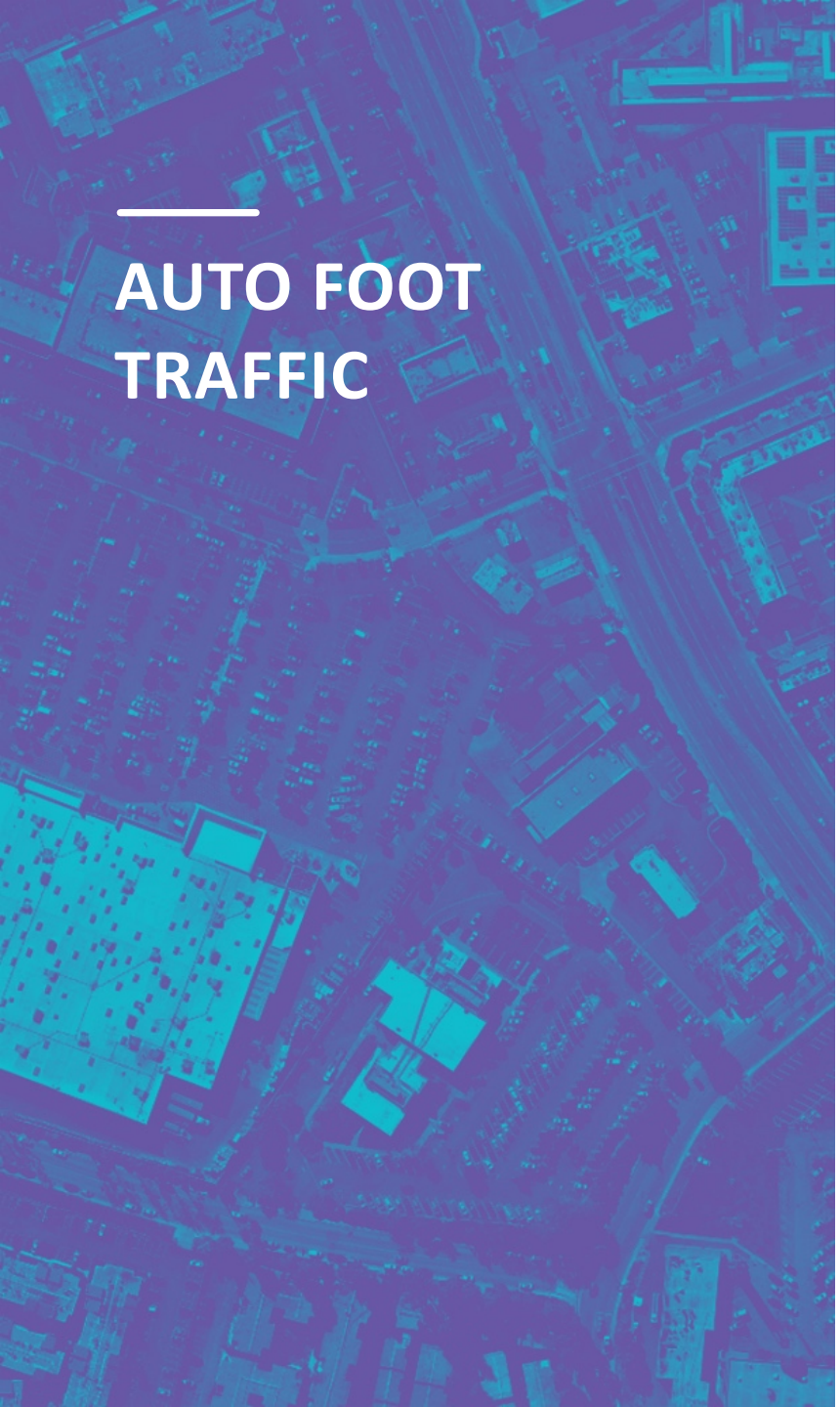
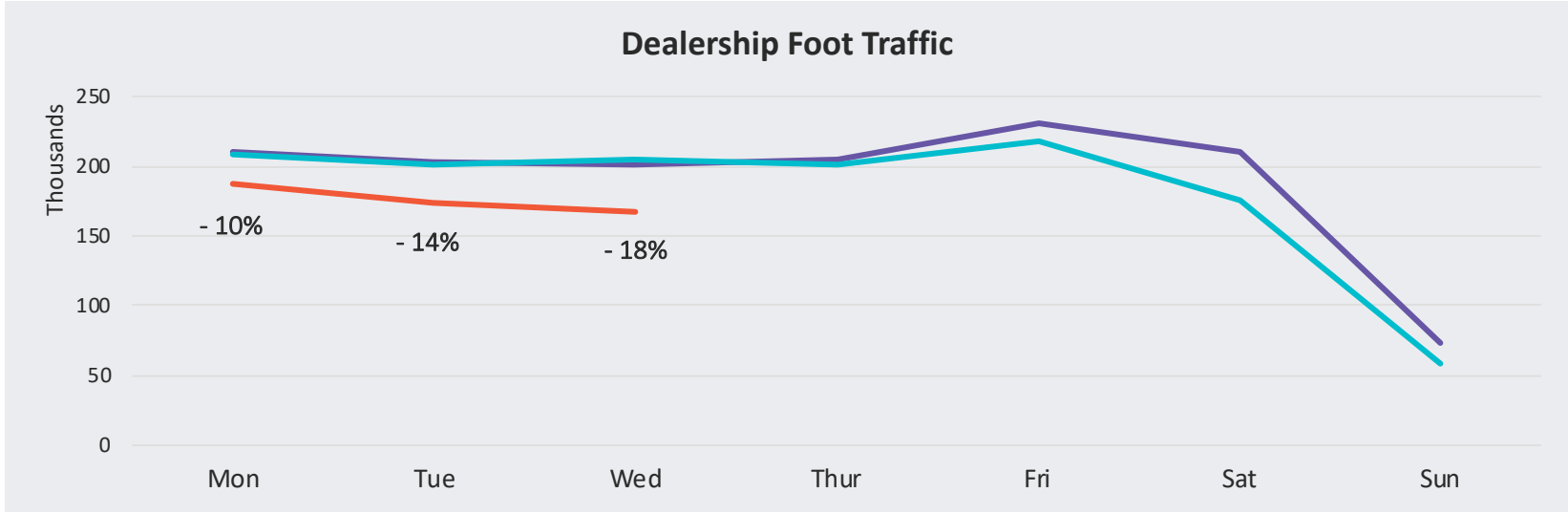


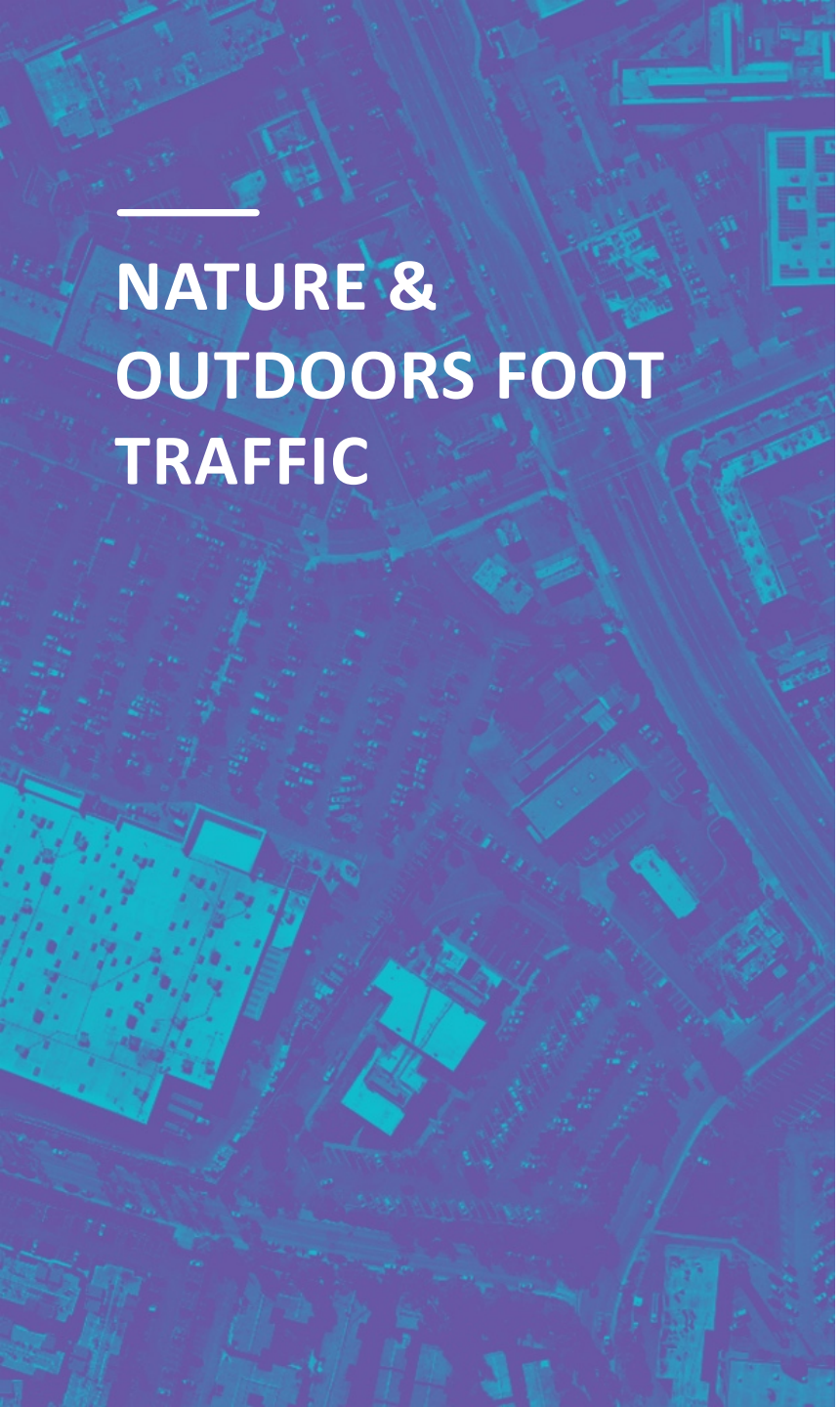
AUTO FOOT TRAFFIC

Auto dealerships that rely on in-person sales are also feeling the shift, though dealership visitation is dropping at a lesser pace than non-essential retail and dining locations. This could be because the majority of traffic to dealerships, at any given time, is service traffic – which might be a visit that is essential due to safety.

We'll continue to monitor how traffic shifts, and expect to see a decline in auto maintenance due to less usage while communities shelter in place.

COVID-19 TRACKER:
Auto Dealership Foot Traffic



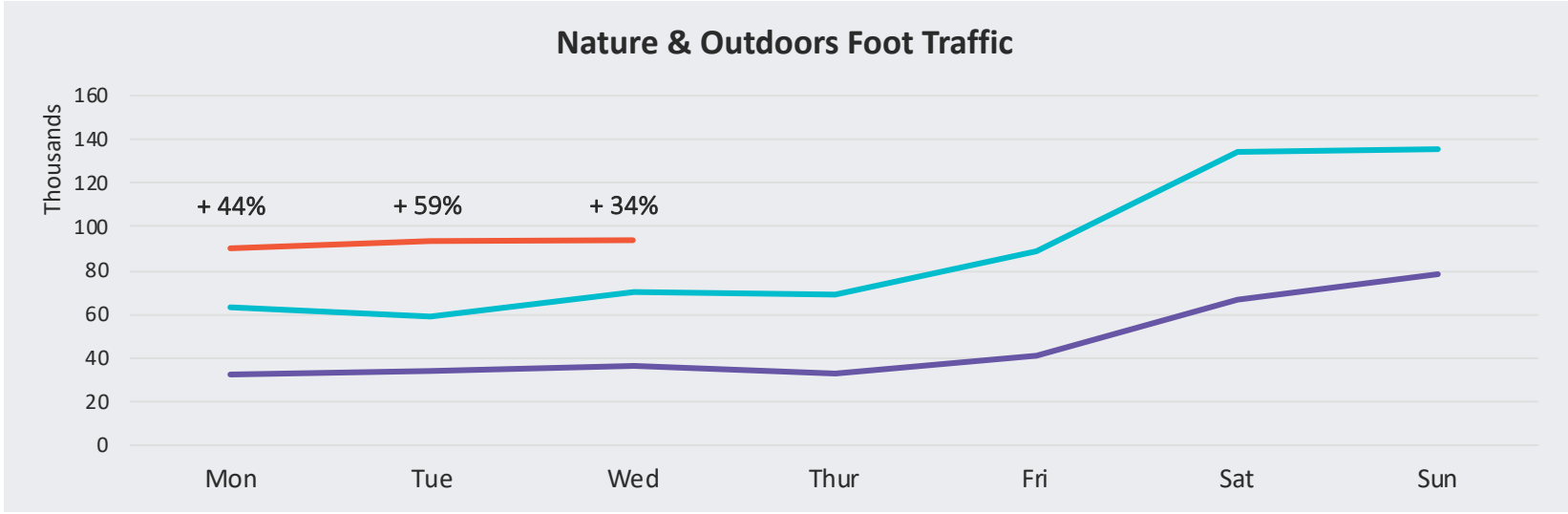


NATURE & OUTDOORS FOOT TRAFFIC

Thankfully, it is possible to socially isolate while exercising, and we're seeing people do exactly that. Traffic to large, natural parks is up significantly from the previous week.

As governments and citizens better negotiate the best way to allow people safe ways to get some fresh air, we hope to see this figure equalize, not continue to climb. Already many municipalities in California have closed public beaches and sports courts to encourage better distancing.

COVID-19 TRACKER:
Aggregate Foot Traffic



OVERALL CONSUMER MOVEMENT

We've also created a rolled up metric which approximates general out-of-home visitation across all verticals. We will be using this overall index as a proxy to understand how effectively people are *staying at home*.

Currently, this metric is down roughly a third from normal levels, but we expect (and hope) to see this fall further as more are made aware of the importance of social isolation in mitigating the effects of COVID-19.

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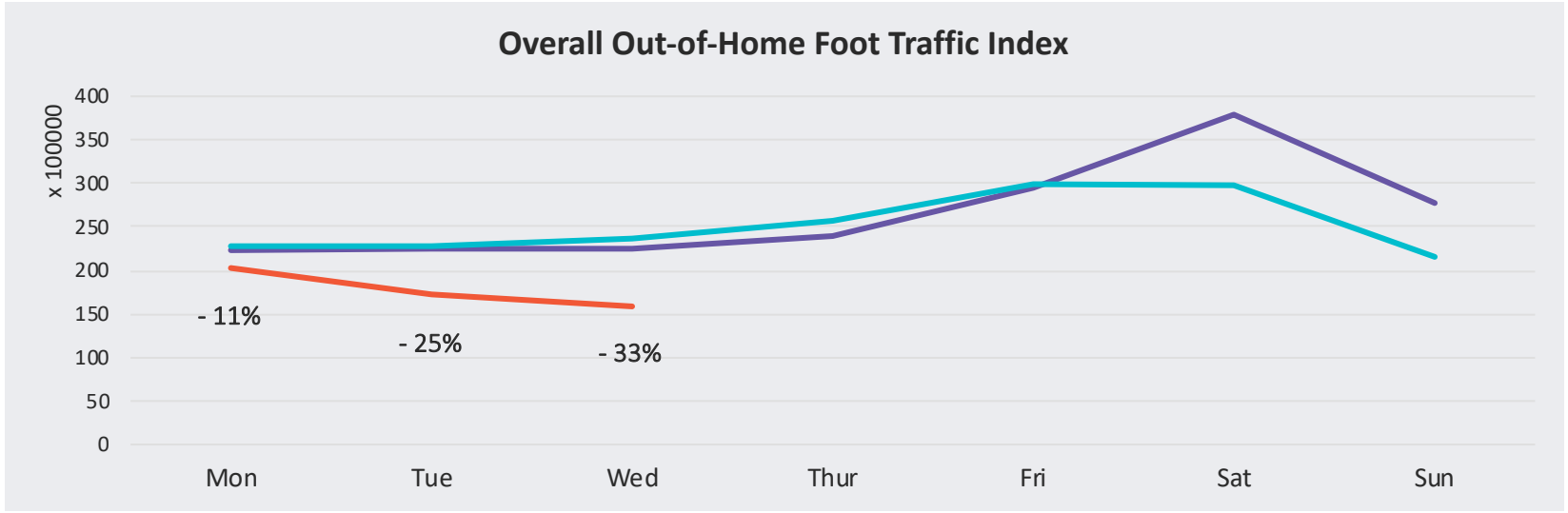

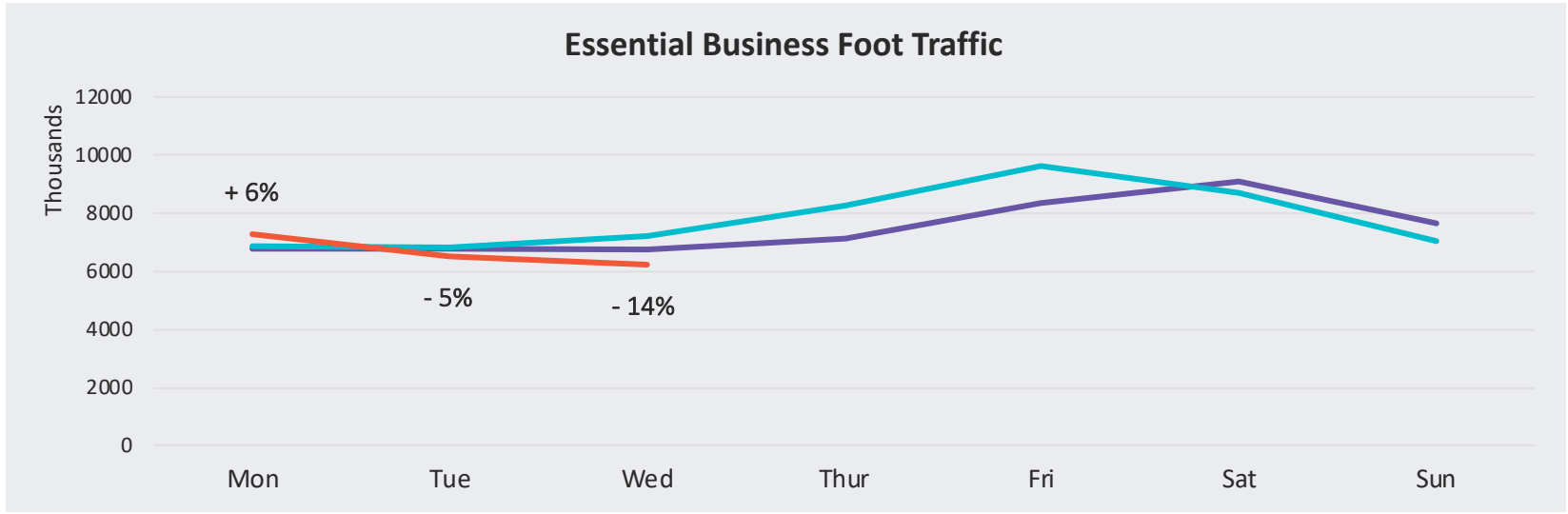

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