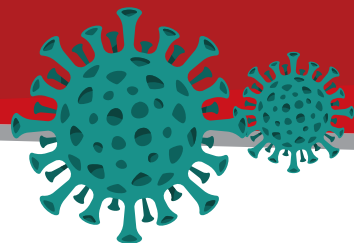


COVID-19 SA LOCKDOWN LEVEL 4 SHOPPING PATTERNS & BEHAVIOUR

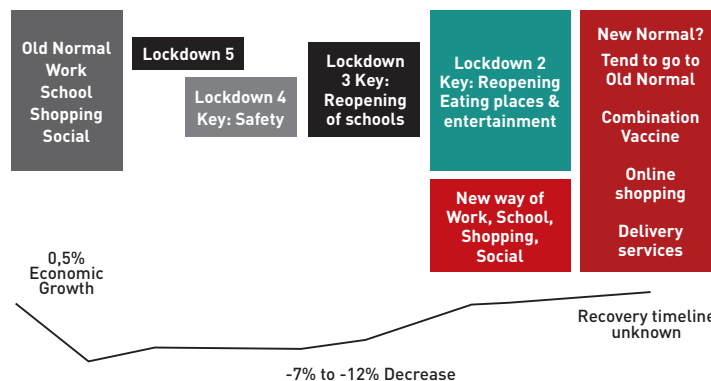
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Economic indicators during good and bad times

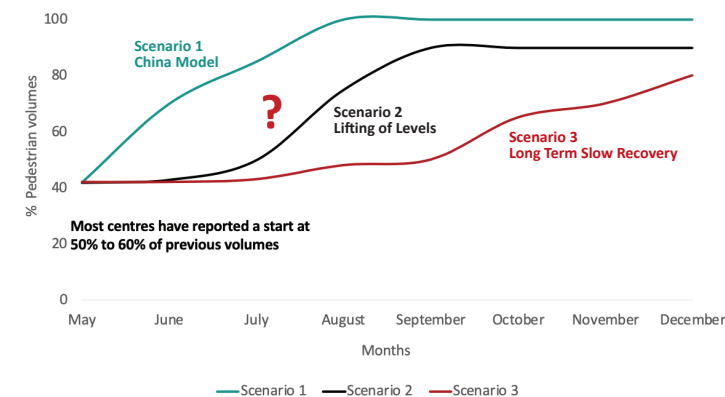
Property Economic Indicators	Trend			
	2006	2008	2020	Covid-19
GDP Growth	↑	→	↓	↓
Inflation	↓	↑	↓	↓
Car Sales	↑	↓	↓	↓
Formal Employment	↑	→	↓	↓
Retail Sales (real prices)	↑	↓	→	↓
SACCI - Business Confidence Index	↑	↓	→	↓
FNB/BER Building Confidence Index	↑	↓	↓	↓
FNB/BER Consumer Confidence Index	↑	↓	↓	↓
Interest Rates	↓	↑	↓	↓

Changing Behaviour

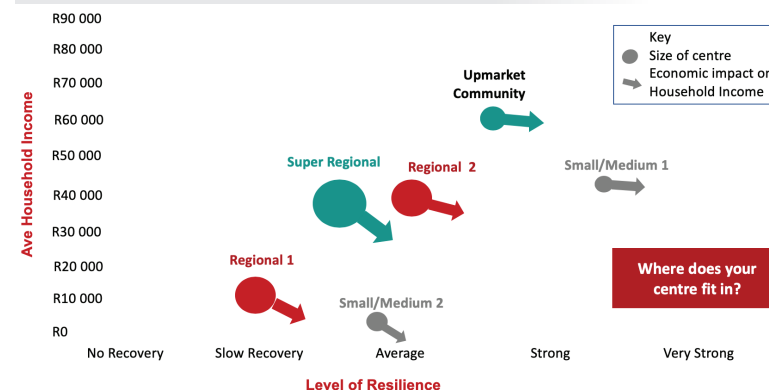


- **GDP** to show a decrease of 7% to 12% for 2020
- **35% unemployment** will add 2 million workers
Current unemployment rate is 29%
- **Retail sales** to drop by 12%-15%
- **SACCI BCI** at 78 - Lowest since 1985
Was 90 in March 2020
- **Interest rates, inflation and petrol prices-only positive**

Return to Shopping Centres

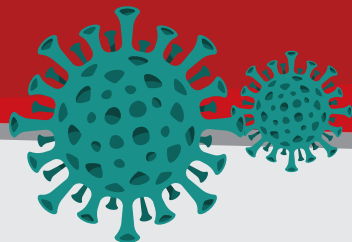


Resilience vs Monthly Household Income



COVID-19 SA LOCKDOWN LEVEL 4 SHOPPING PATTERNS & BEHAVIOUR

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Purpose of this Market Research

- Covid-19 changed shopping patterns and behaviour worldwide
- SACSC is in regular discussions with Government and stakeholders
- Need for information about changes in shopping habits all over South Africa

These insights will also guide tenants and shopping centre owners regarding the way forward in the implementation of Level 3 requirements and protocols.

Objectives

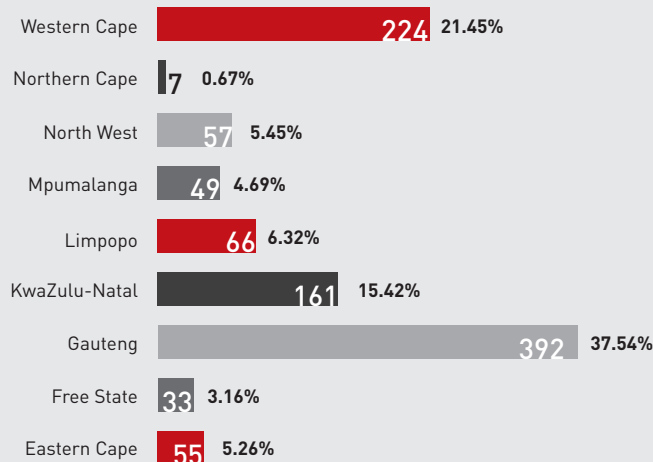
- Very broad overview of shopping behaviour **before** Lockdown Level 5;
- Shopping was done during Lockdown **Level 5**;
- The emphasis during **Level 4** is:
 - **Return** to shopping centres;
 - **Level of comfort** with which shoppers have returned to shopping centres;
 - **Health and safety requirements essential**;
 - How **many centres** have been visited during Level 4;
 - **Visits to specific centres, frequency, specific products, and time spent**;
 - **Satisfaction levels, frustrations** and their **overall experience** at a particular centre;
- Recommendations regarding products and services to be offered during Level 3 and

- To focus on the past, current and future use of online shopping.

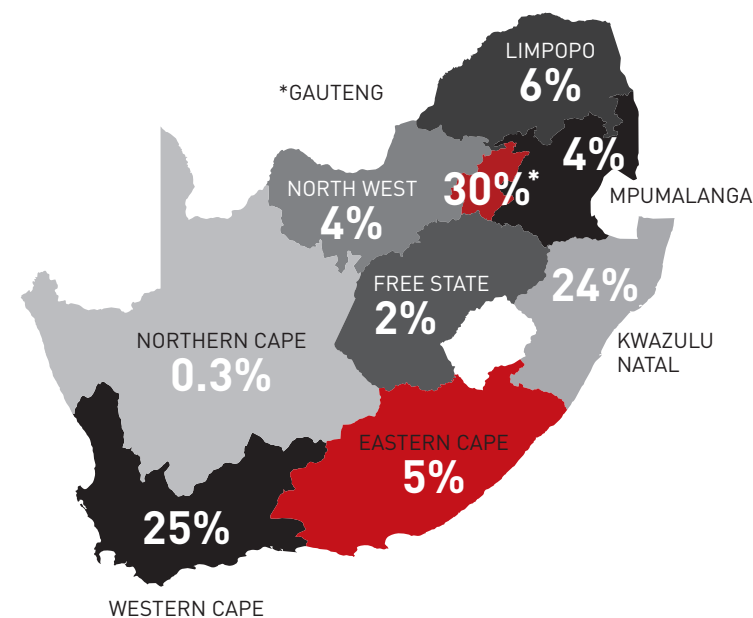
Research Methodology

- Broad overview
- SACSC sent out the questionnaire
- Done via social media, Facebook etc
- From 14 May to 25 May 2020
- Dipstick measurement/snap shot
- 5 600 responses very positive
- Good representation of different types centres countrywide.

Number of shopping centres visited per province (1044 total)



Respondents per province



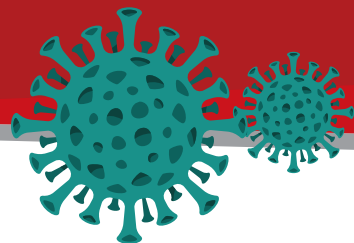
Gender



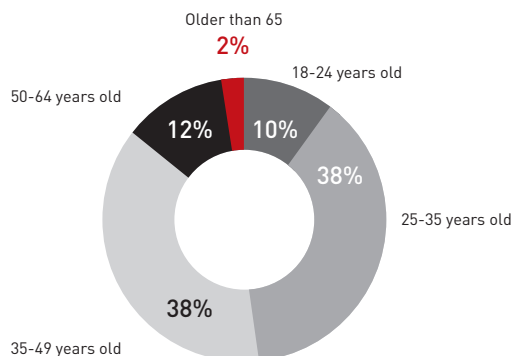
*1% prefer not to say

COVID-19 SA LOCKDOWN LEVEL 4 SHOPPING PATTERNS & BEHAVIOUR

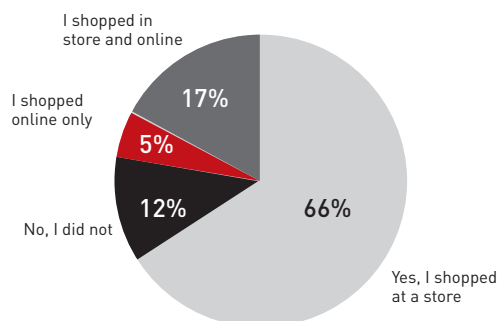
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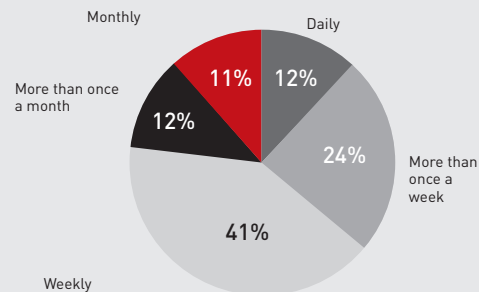
Age profile of respondents



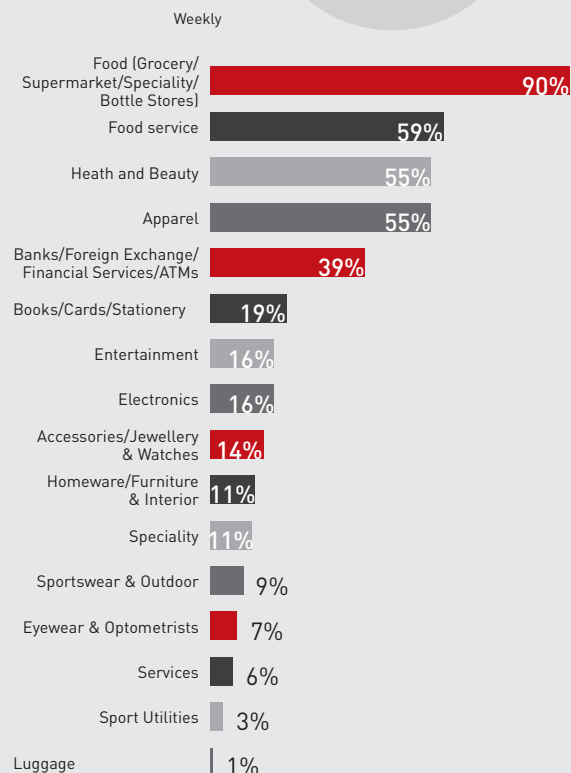
Level 5: Did you do any shopping?



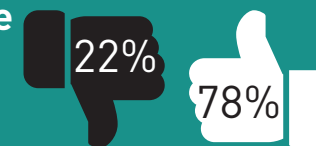
Before Lockdown: How often did you do shopping?



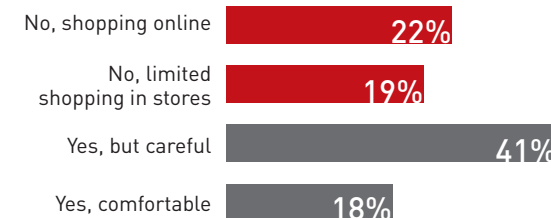
Before Lockdown: Merchandise categories supported?



Level 4: Have you visited a Shopping Centre?



Level 4: Comfortable Shopping

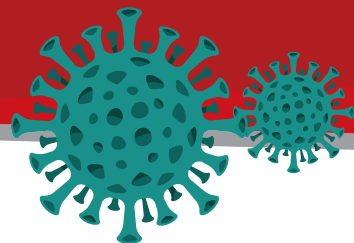


Level 4: How many Centres do you visit?

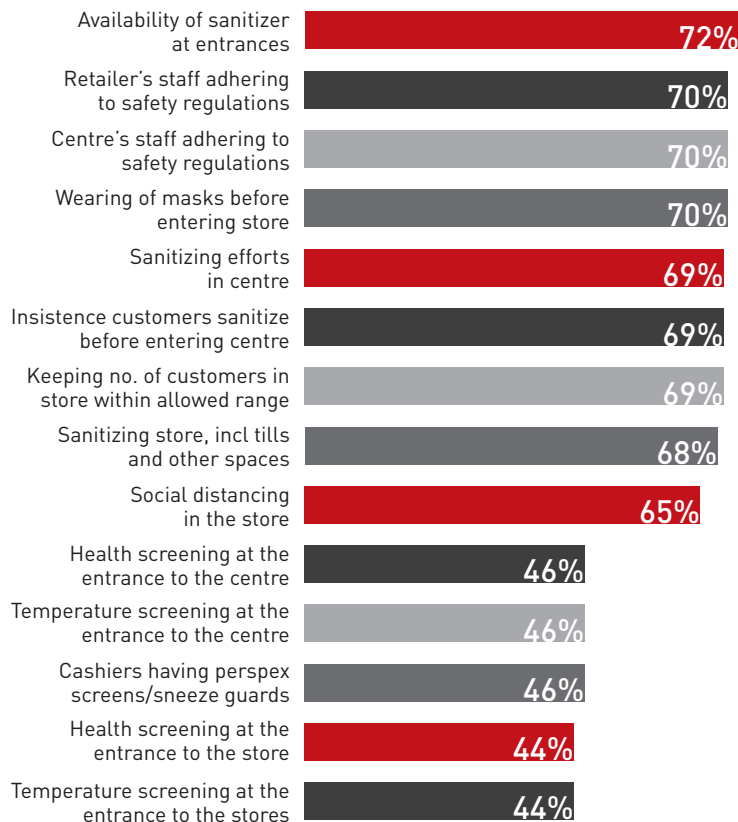


COVID-19 SA LOCKDOWN LEVEL 4 SHOPPING PATTERNS & BEHAVIOUR

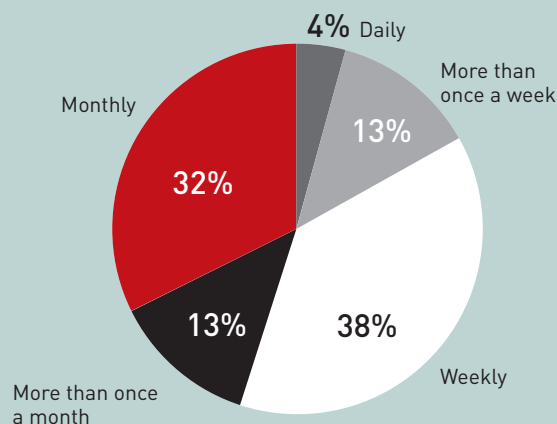
MARKET STUDY - MAY 2020



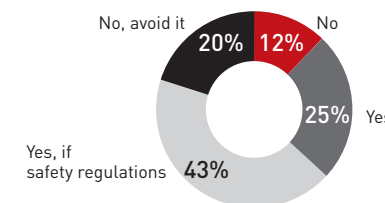
Essential aspects in Shopping Centres (Essential to Very Essential)



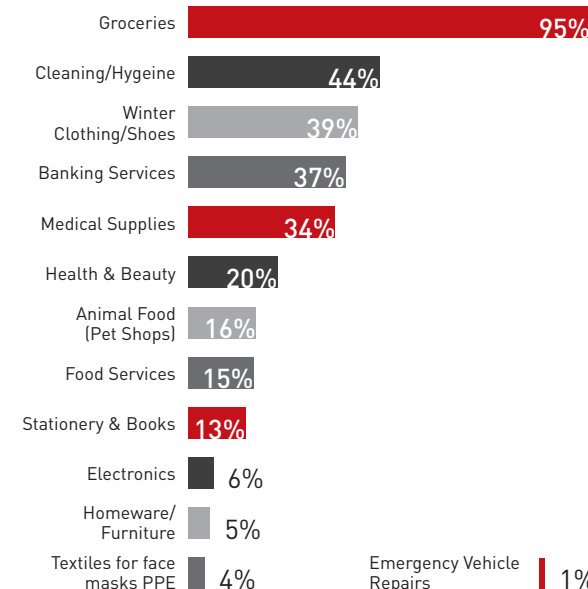
Level 4: Frequency of visiting Shopping Centres?



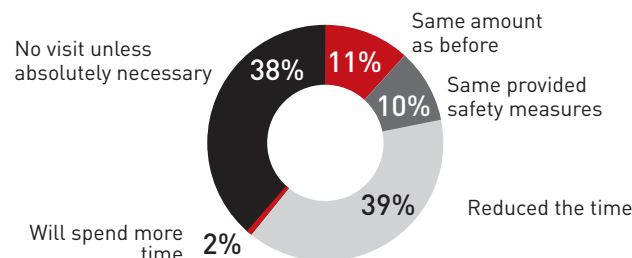
Level 4: Visiting restrooms in Shopping Centres



Level 4: Products purchased

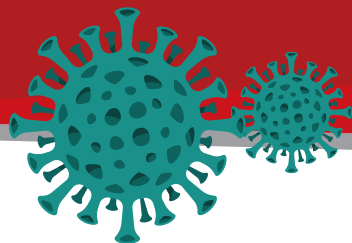


Level 4: Time spend in Shopping Centres

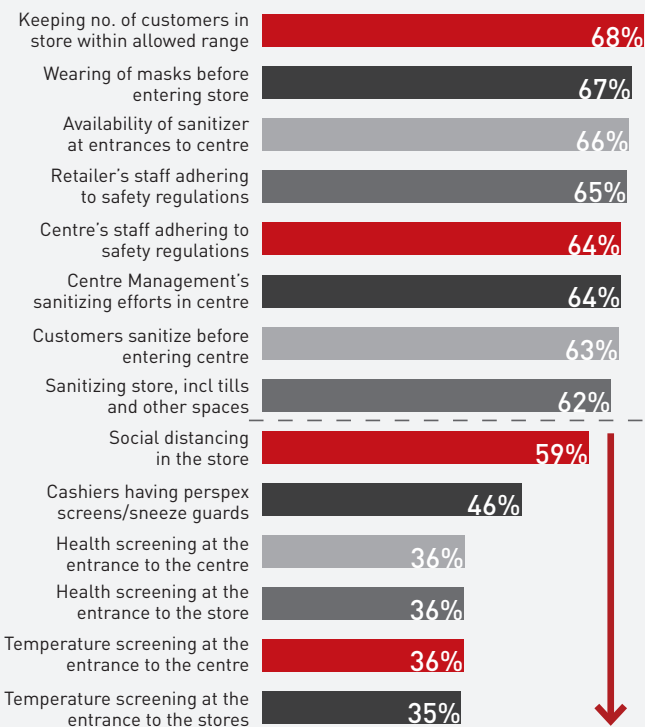


COVID-19 SA LOCKDOWN LEVEL 4 SHOPPING PATTERNS & BEHAVIOUR

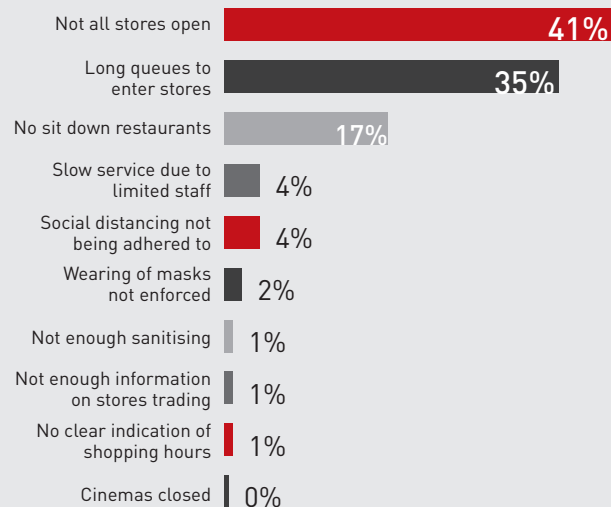
MARKET STUDY - MAY 2020



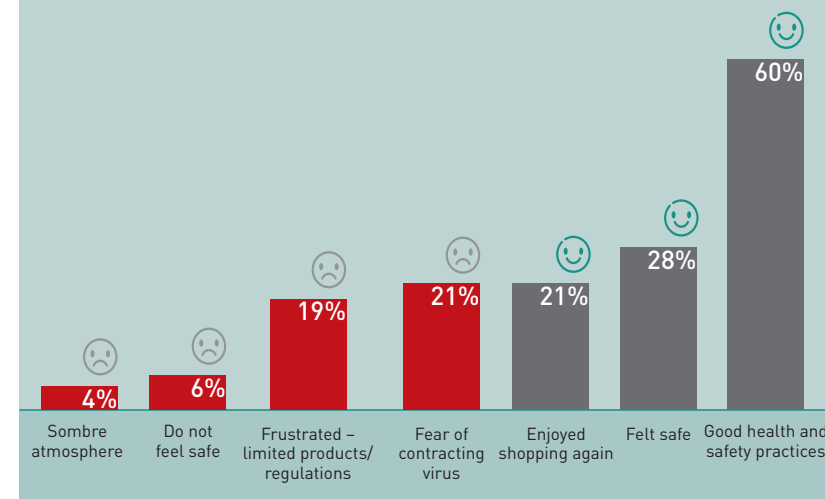
Level 4: Satisfaction ratings at centres visited



Level 4: Main frustrations of shoppers

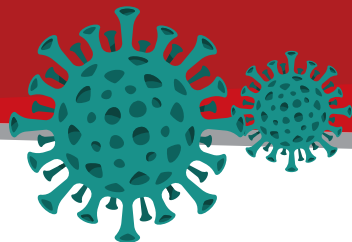


Level 4: Overall Experience

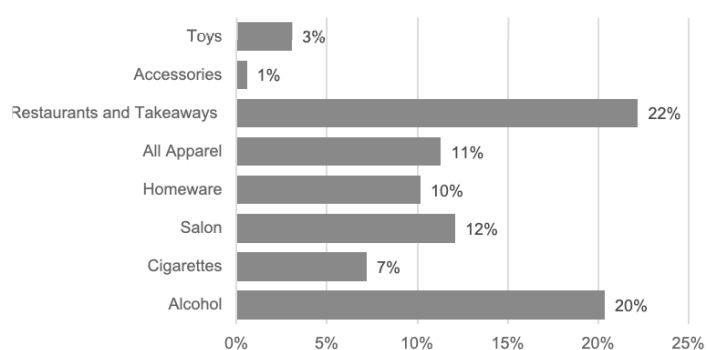


COVID-19 SA LOCKDOWN LEVEL 4 SHOPPING PATTERNS & BEHAVIOUR

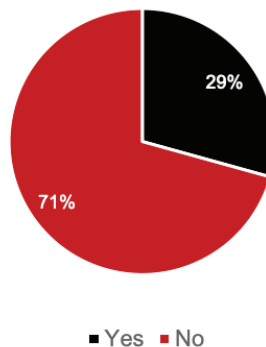
MARKET STUDY - MAY 2020



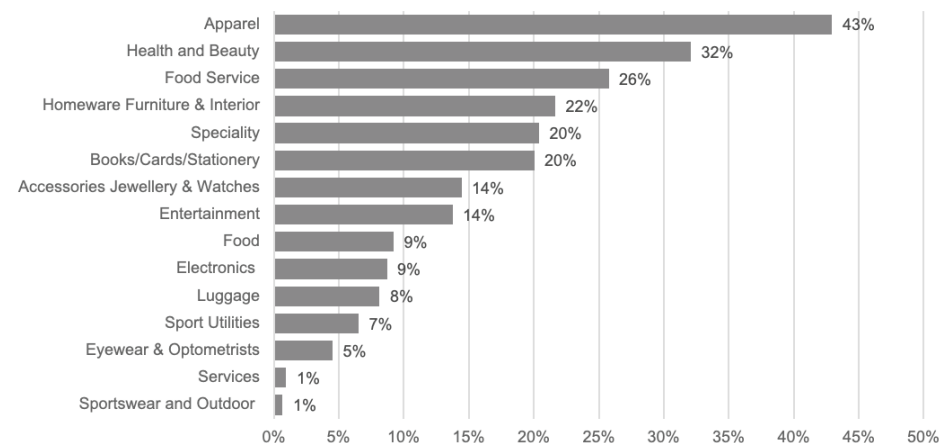
Types of products wanted in level 3



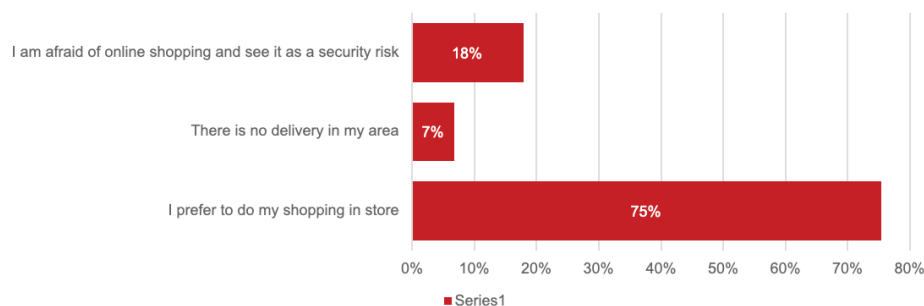
Are you a regular online shopper?



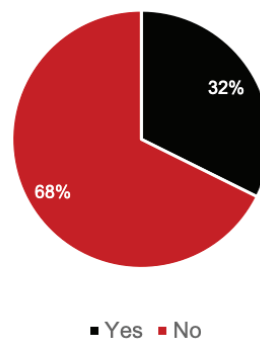
Merchandise categories to buy online



Why do you not shop online?



Are you a regular online shopper now?



Preferred delivery method

