

Case Study:

Mall & Casino

Consumer Data Analytics

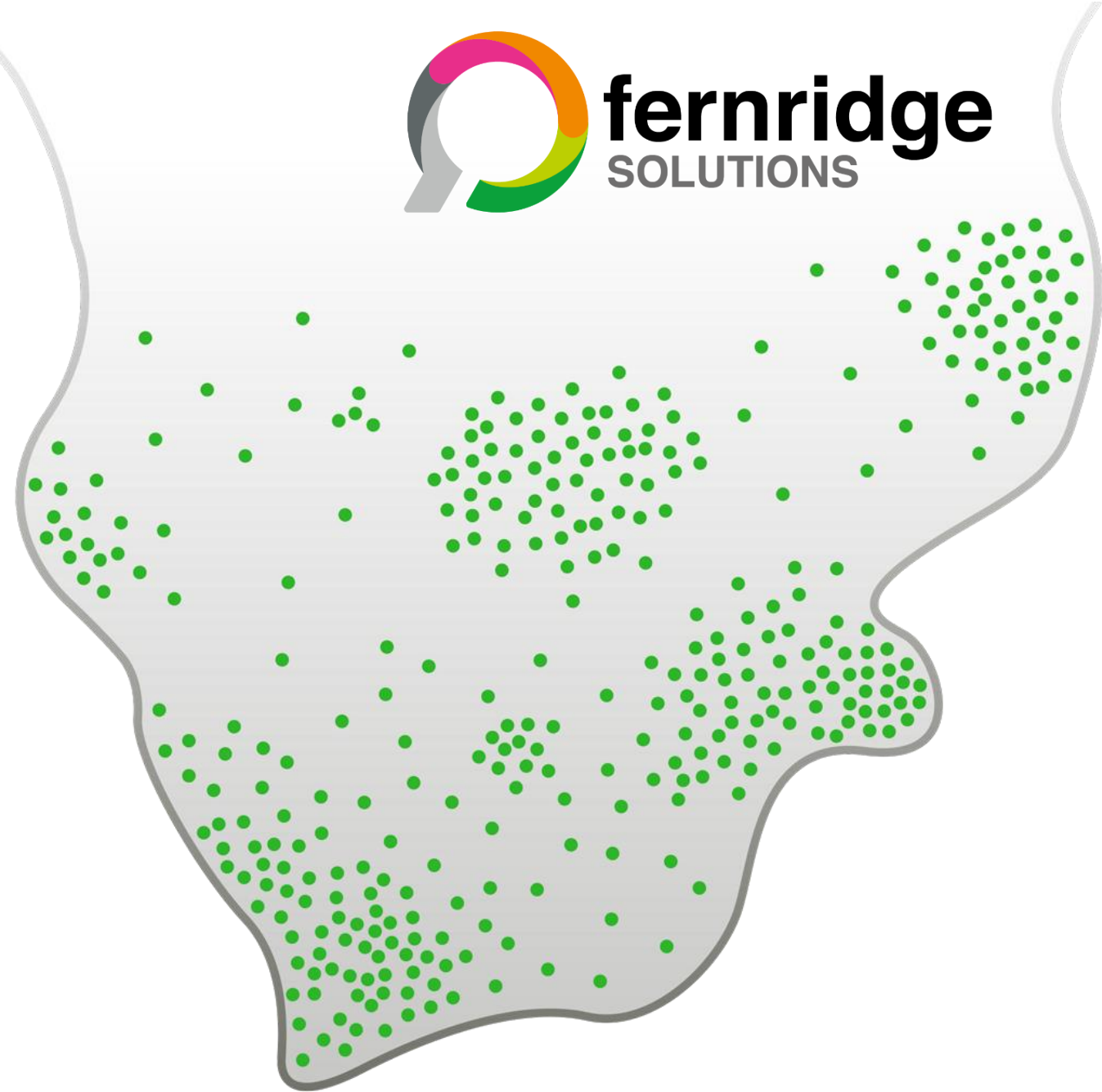
Sybrand Strauss

Director & Founder

API

Cape Town

September '24



About Us

Who are we?

Fernridge is a 22-year-old technology and data enabled **insights** & solutions business located in Johannesburg, South Africa.

What do we do?

We empower our clients with actionable insights to make informed business decisions by providing them with location-based proprietary **data** and **solutions** across **Africa**.

Value proposition:



Data

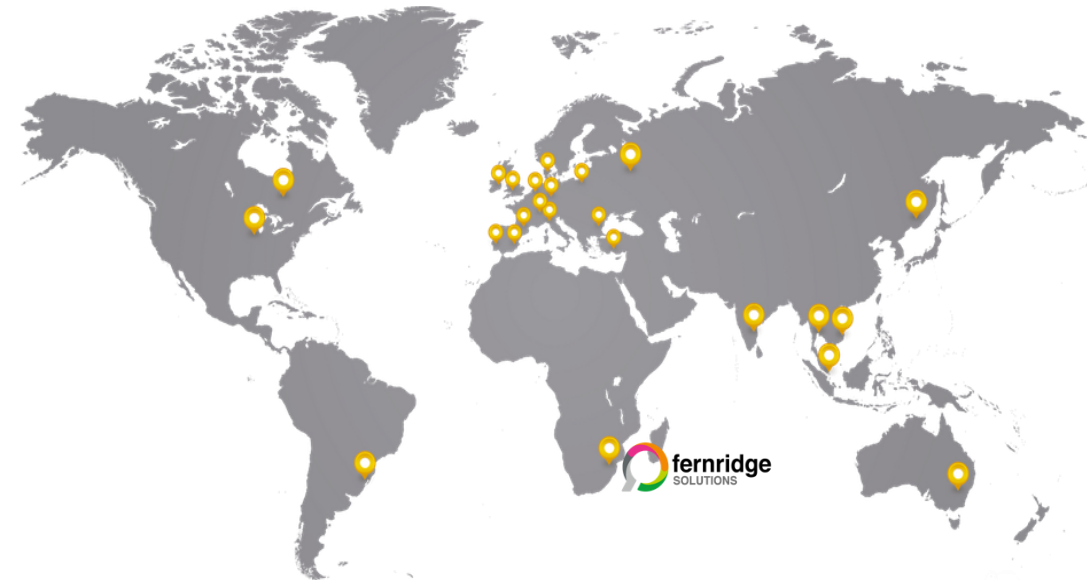


Insight



Action

Member of: **Ebeltoft Group**
Global Brand & Retail Experts





Our Experience



22

Years in business
(est.2002)



2

B-BBEE Level



75

Africa cities/towns
where fieldwork has
been conducted



12m

Geo-referenced
dwellings in South
Africa



13.5m

Geo-referenced
dwellings in Africa
(excluding South
Africa)



>200

Cities and towns
across Africa
covered by our
proprietary
demographic data



1,300

Unique clients
obtained expert
advice



5,000+

Market reports
completed



6,000+

Reports published
since 2015 through
www.africaeye.co.za



1m

Unique Points-of-
Interest mapped
(commercial,
education, medical,
hospitality,
transport, etc.)



30,000

Retailers mapped



25,000

Customer-in-action
interviews/surveys
conducted



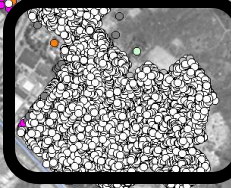
The Power Of Spatial



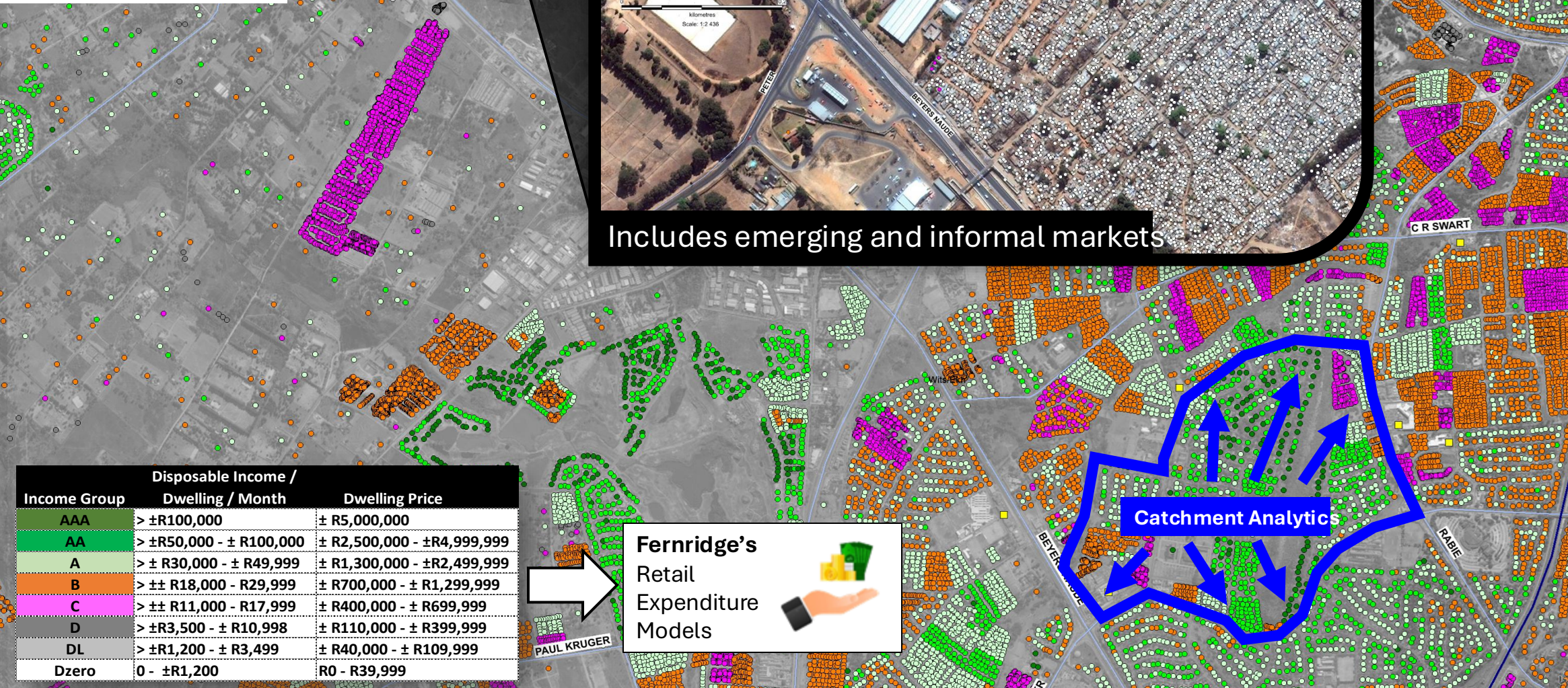
AfricaEye DATA:

Fernridge's best-in class, proprietary and granular data

- Privacy-lead (POPI)
- Proprietary
- Granular
- More than 220 projects completed outside of RSA over the last 5 years



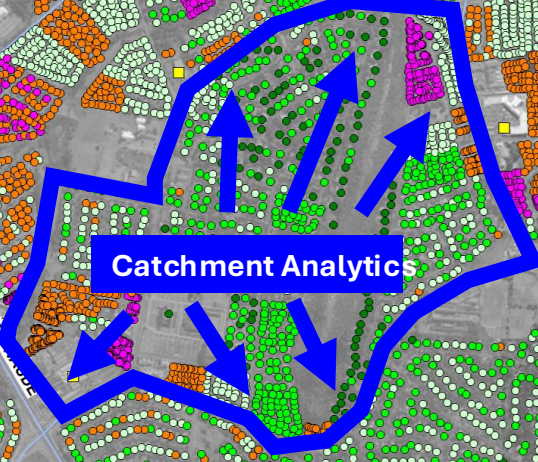
Includes emerging and informal markets



Income Group	Disposable Income / Dwelling / Month	Dwelling Price
AAA	> ±R100,000	± R5,000,000
AA	> ±R50,000 - ± R100,000	± R2,500,000 - ±R4,999,999
A	> ± R30,000 - ± R49,999	± R1,300,000 - ±R2,499,999
B	> ± R18,000 - R29,999	± R700,000 - ± R1,299,999
C	> ± R11,000 - R17,999	± R400,000 - ± R699,999
D	> ±R3,500 - ± R10,998	± R110,000 - ± R399,999
DL	> ±R1,200 - ± R3,499	± R40,000 - ± R109,999
Dzero	0 - ±R1,200	R0 - R39,999



Fernridge's
Retail
Expenditure
Models



AfricaEye comprises 25+ million data points spanning South Africa and Sub-Saharan Africa

- Privacy-led, rich, deep South African data, with impressive Sub-Saharan coverage

25+m

Approximately half of the AfricaEye dataset pertains to South Africa, with the balance spread across 20 Sub-Saharan countries



11.4 million

South Africa dwellings

13+ million

Rest of Africa dwellings

21

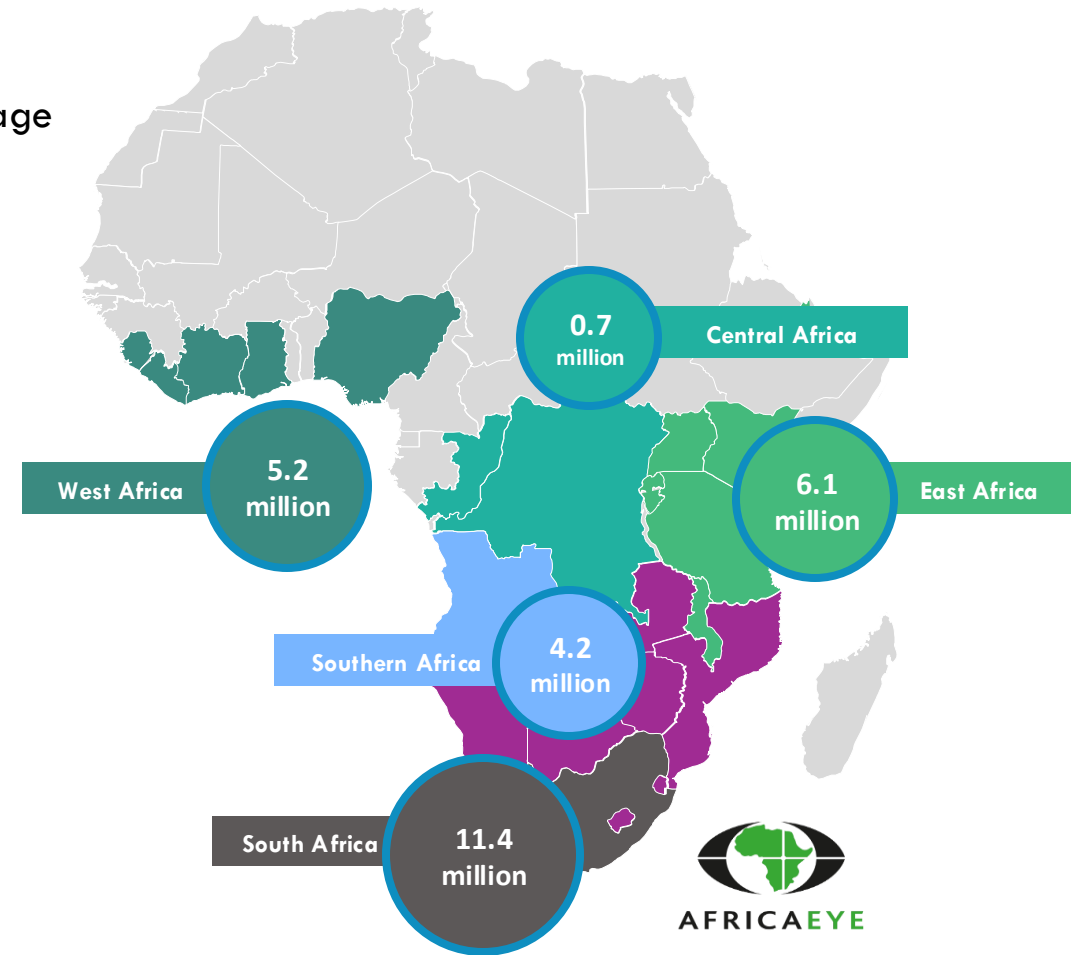
Countries in coverage

272

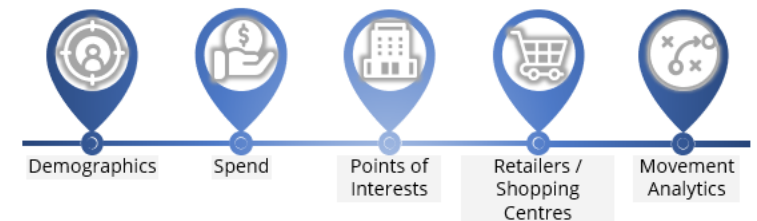
SA towns and territories mapped

199

Rest of Africa cities mapped



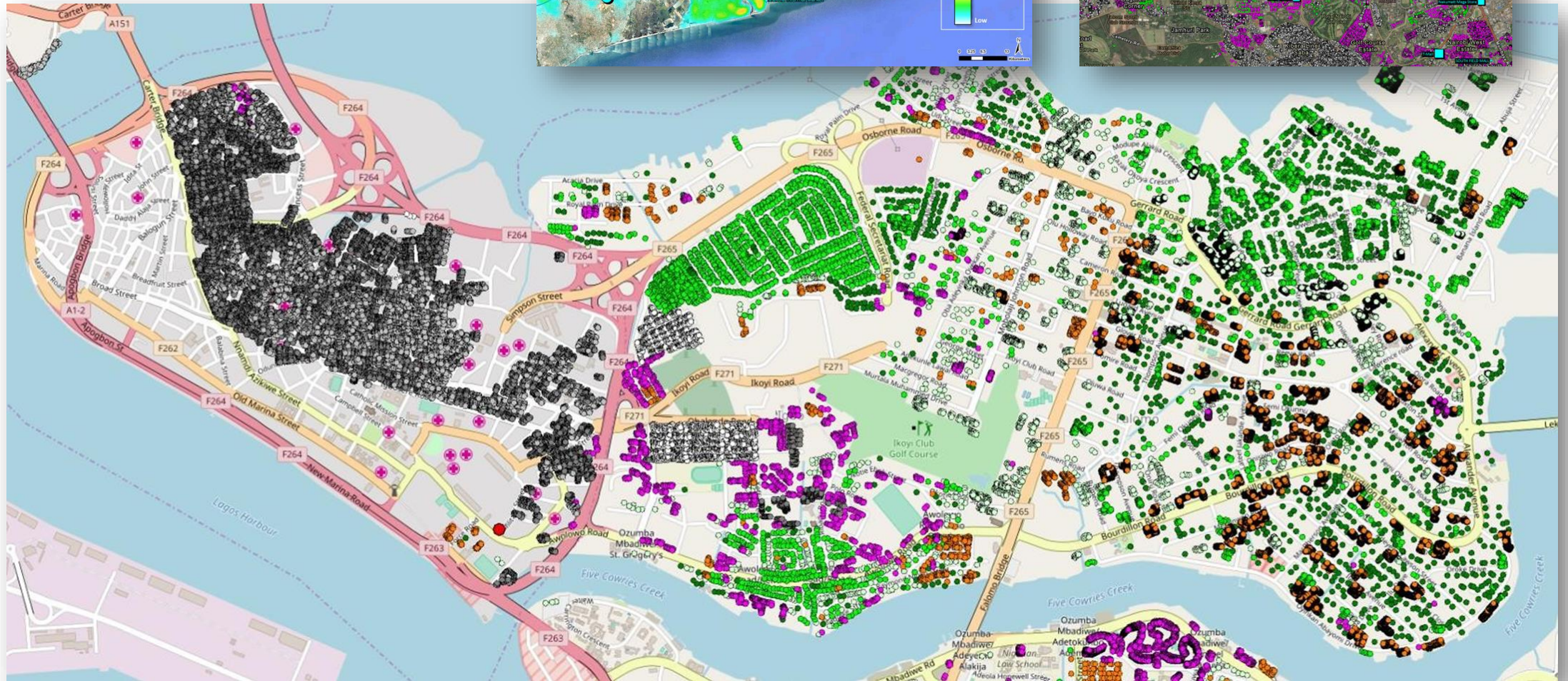
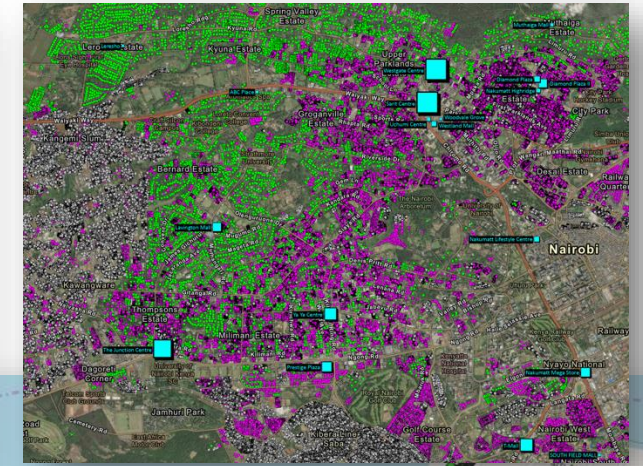
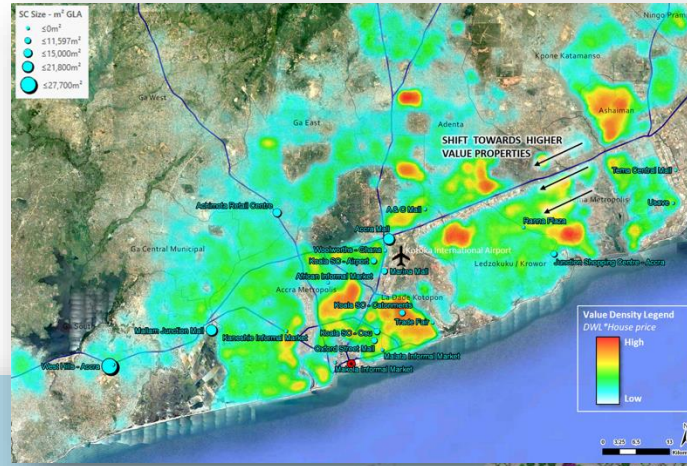
The AfricaEye dataset pertaining to the rest of Africa is particularly **unique**, given the generally **low levels of focus** offered by other location intelligence organisations **direct towards rest of Africa** (ex South Africa)





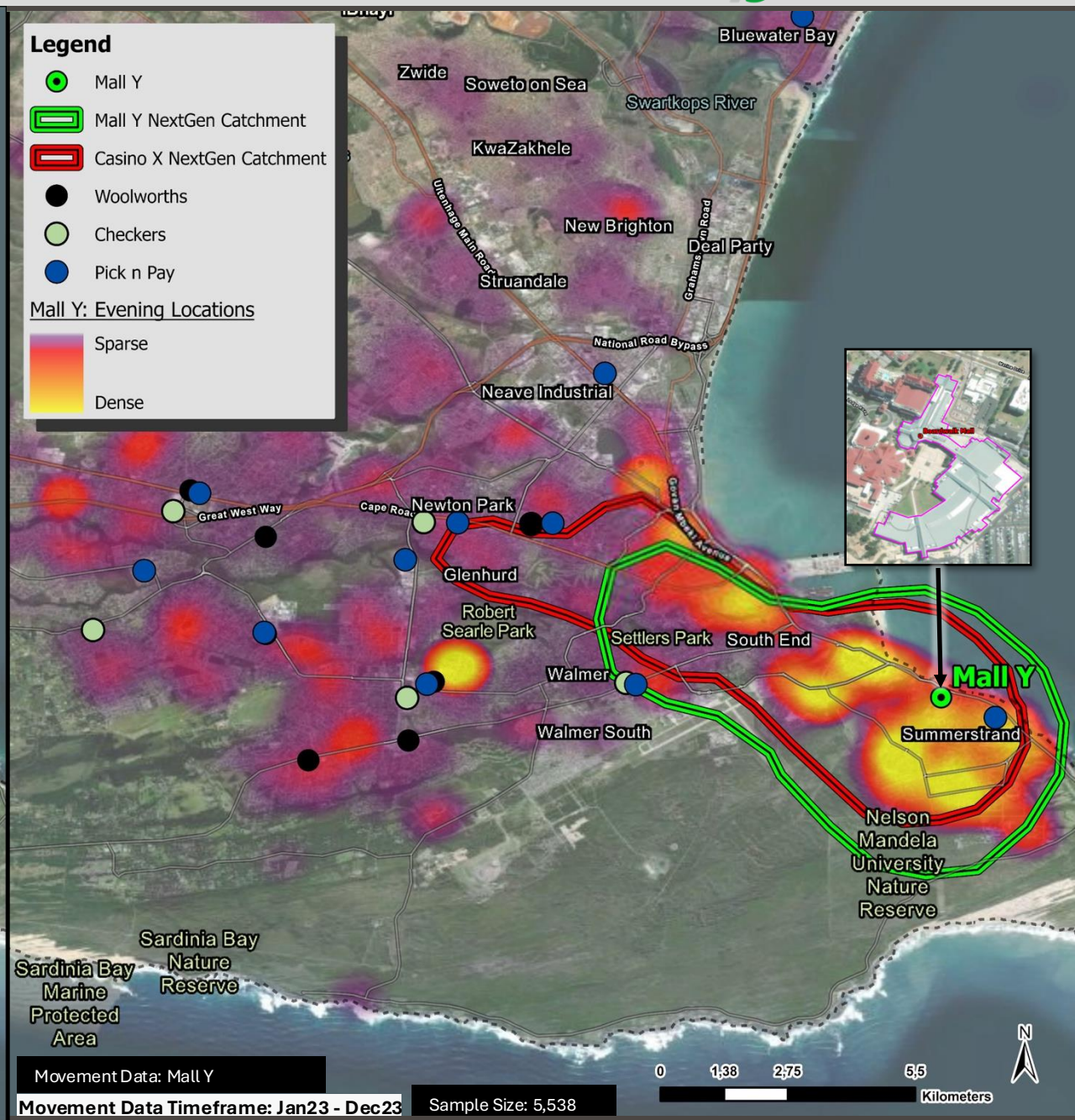
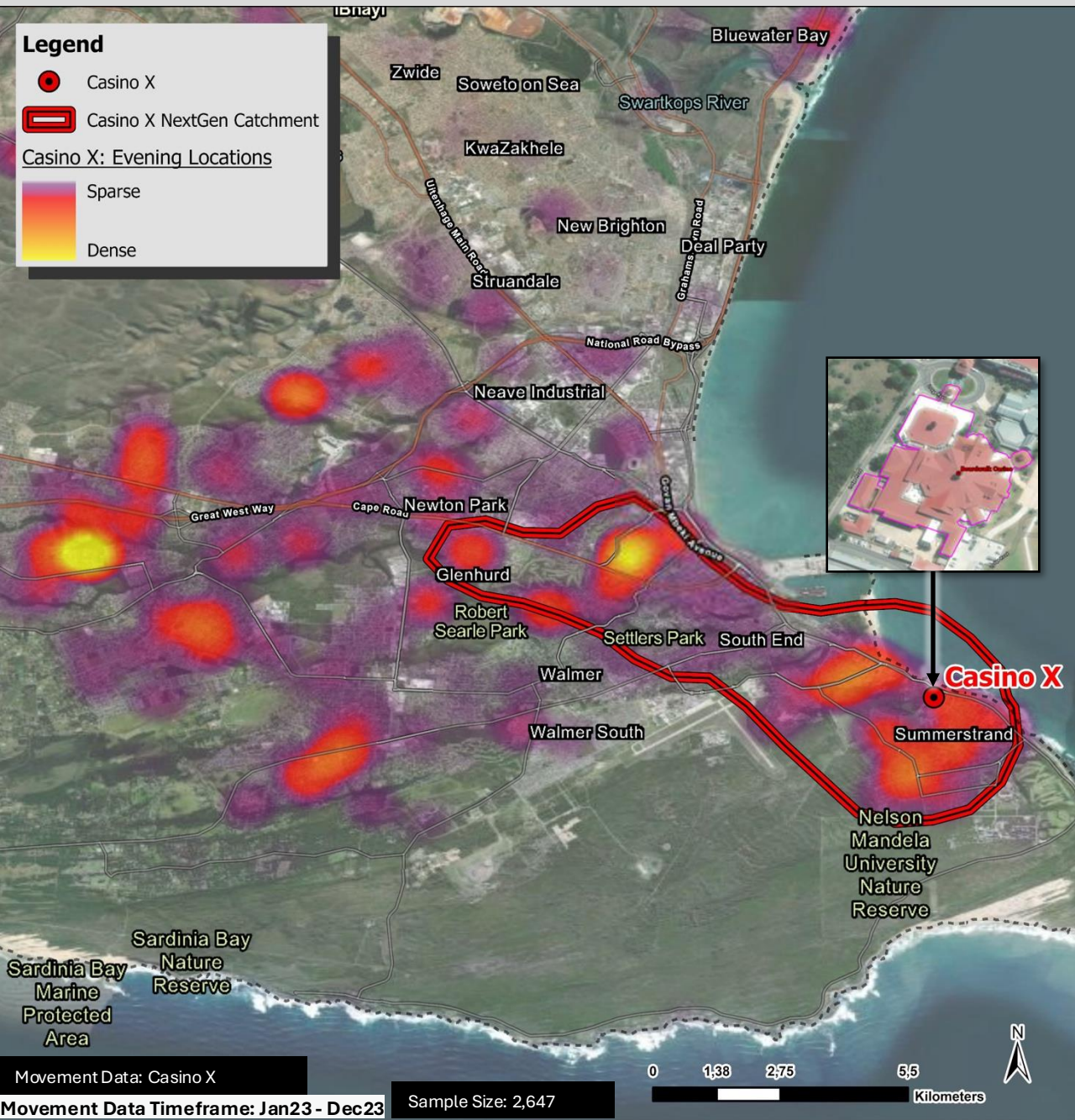
Africa

Snapshots of Significant Africa Markets: Fernridge Go-To-Market Strategy Reports



CASE STUDY: Casino X & Mall Y






The power of matching Fernridge's proprietary household income data to dynamic movement data of customers

Trade area


Visitor's night-time location

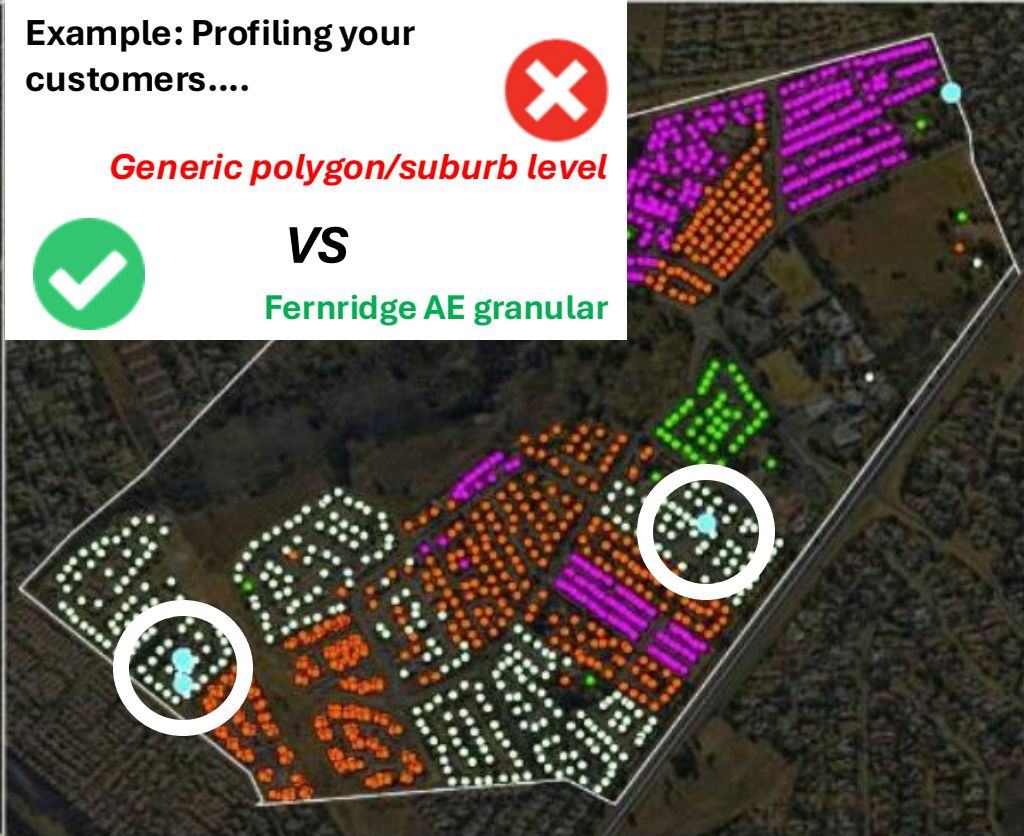
Income Group (Monthly Net HSE Income)		Area Profile %
A++	(>R100,000)	0%
A+	(±R50,000 - R99,999)	4%
A	(±R30,000 - R49,999)	27%
B	(±R18,000 - R29,999)	43%
C	(±R11,000 - R17,999)	26%
D	(±R3,500 - R10,999)	0%
D Low	(±R1,200 - R3,499)	0%
D Zero	(<R1,200)	0%
Total		100%

Example: Profiling your customers....

 **Generic polygon/suburb level**

VS

 **Fernridge AE granular**





Casino X

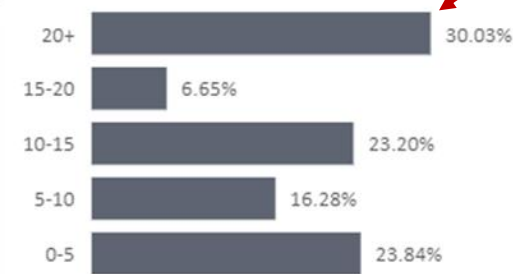
Customer Demographic Profile

Movement Data

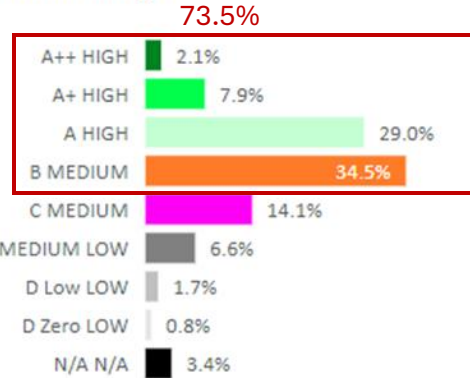
Date : Jan 2023 - Dec 2023

SubPlace	Unique Devices	% Per Suburb	Ave Dist (km)
Summerstrand	321	12.27%	0.31
Kabega	88	3.36%	14.07
Lorraine	80	3.06%	12.28
Humewood	75	2.87%	0.88
Mount Croix	70	2.68%	5.00
Port Elizabeth Central	53	2.03%	4.25
Sunridge Park	47	1.80%	11.13
Walmer	46	1.76%	5.54
Fairbridge Heights	45	1.72%	33.56
Rowallan Park	42	1.61%	17.95
Linkside	40	1.53%	6.00
Van Riebeeck hoogte	40	1.53%	31.98
Overbaakens	37	1.41%	9.95
Willow Glen	34	1.30%	14.00
Broadwood	33	1.26%	10.03
Cotswold	30	1.15%	10.47
Sherwood	28	1.07%	15.43
Newton Park	27	1.03%	9.04
Glenhurd	25	0.96%	8.00
Algoa Park	24	0.92%	11.92
Kamma Park	23	0.88%	14.00
Malabar	23	0.88%	12.30
Sidwell	23	0.88%	8.52
Bethelsdorp SP	22	0.84%	18.64
Mount Pleasant	22	0.84%	10.32
Mill Park	21	0.80%	5.43
Bluewater Bay	20	0.76%	13.50
Jeffrey's Bay SP	19	0.72%	69.00
Total	2616	100.00%	114.92

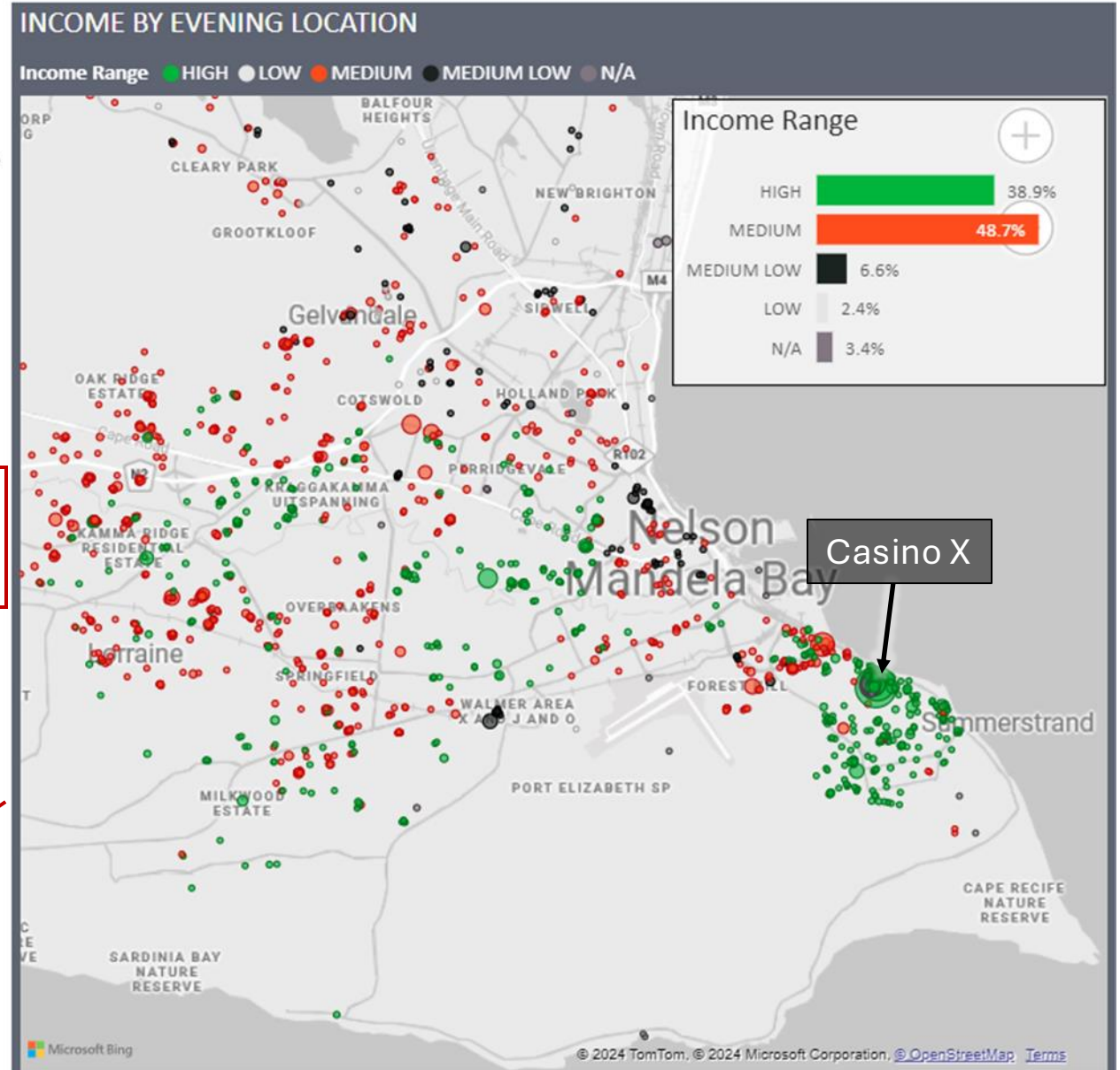
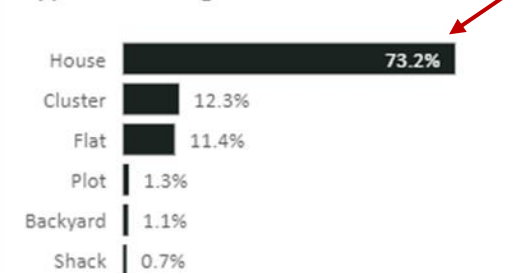
Drive Distance Range



Income Range



Type Dwelling



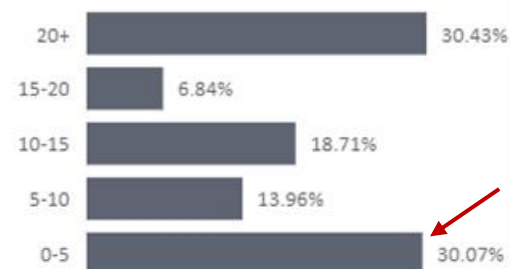


Movement Data
Date : Jan 2023 - Dec 2023

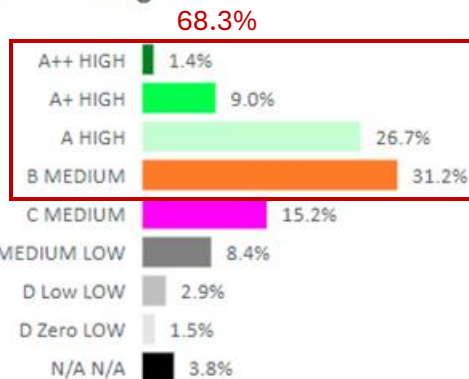
SubPlace	Unique Devices	% Per Suburb	Ave Dist (km)
Summerstrand	817	14.97%	0.67
Port Elizabeth Central	196	3.59%	3.70
Humewood	177	3.24%	1.20
Walmer	175	3.21%	6.02
Nelson Mandela Metropolitan University	126	2.31%	2.13
Kabega	93	1.70%	14.31
Lorraine	85	1.56%	12.72
Overbaakens	75	1.37%	10.00
Malabar	72	1.32%	12.58
Parsons Vlei	66	1.21%	15.76
Newton Park	64	1.17%	8.97
Algoa Park	62	1.14%	12.06
North End	60	1.10%	5.25
Bluewater Bay	59	1.08%	13.80
South End	59	1.08%	2.69
Humewood Extention	55	1.01%	2.00
Mount Pleasant	53	0.97%	10.81
Nelson Mandela Bay NU	53	0.97%	21.89
Broadwood	51	0.93%	10.25
Bethelsdorp SP	42	0.77%	18.45
Mount Croix	40	0.73%	5.10
Mill Park	39	0.71%	6.69
Kamma Park	37	0.68%	14.00
Cotswold	35	0.64%	10.37
Fairview AH	34	0.62%	10.94
Total	5458	100.00%	140.32

Mall Y

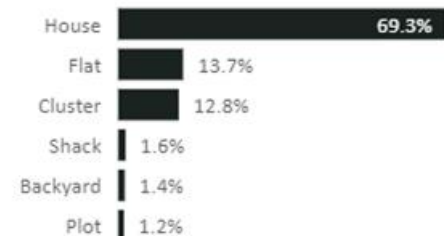
Drive Distance Range



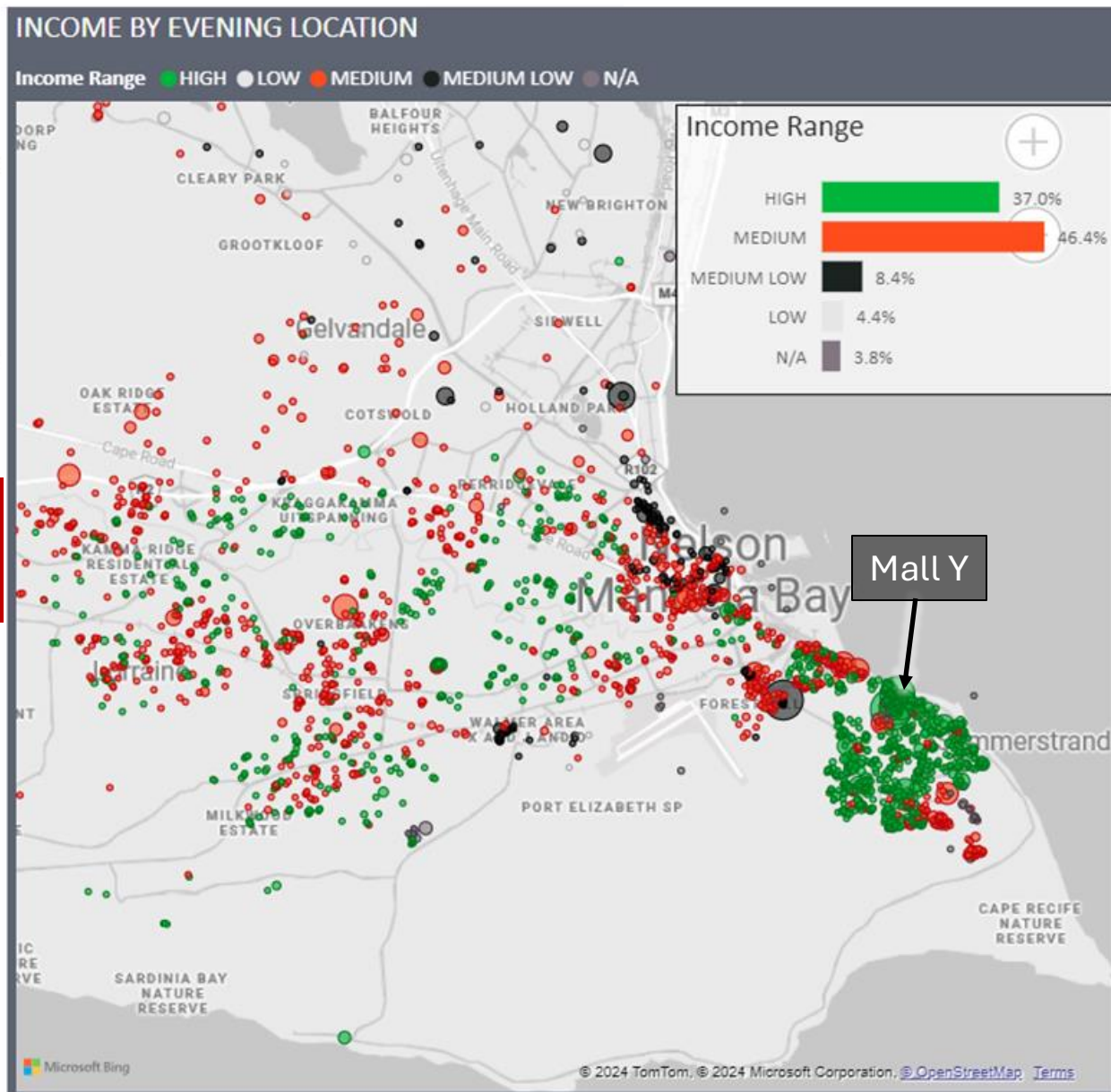
Income Range



Type Dwelling



Customer Demographic Profile

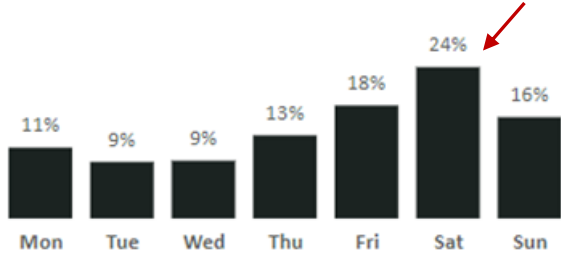


Casino X

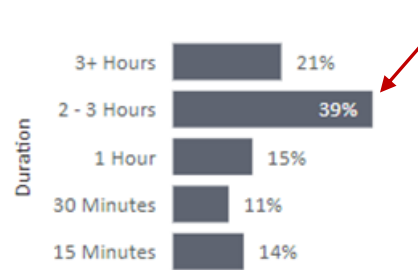
2647
Total Unique Devices

7962
Total Sample Visits

Day of the Week

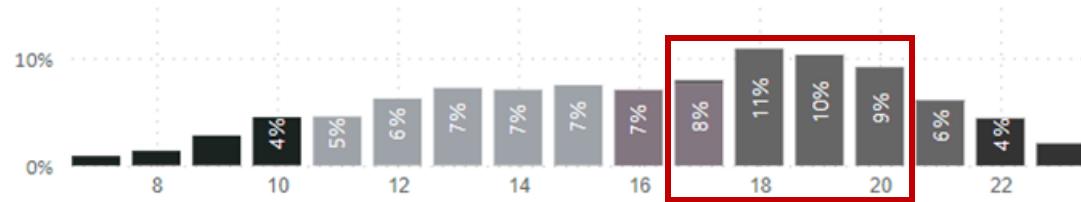


Duration of Visit

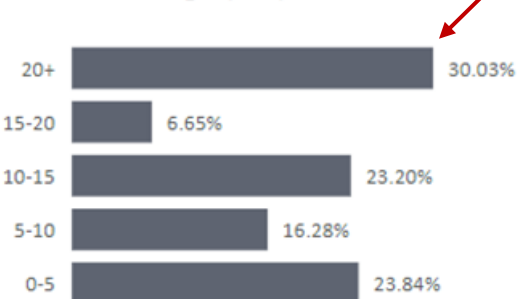


Time of Day

● Afternoon ● Evening ● Lunch Time ● Morning ● Night



% of Visitors Residing within Drive Distance Range (km)



Annual Frequency of Visit per Distance Range (km)

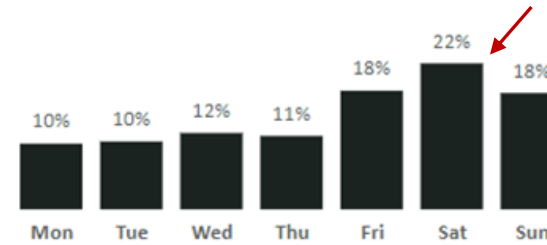


Mall Y

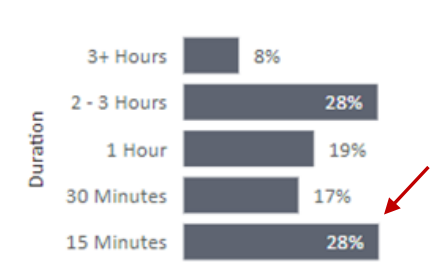
5538
Total Unique Devices

14975
Total Sample Visits

Day of the Week

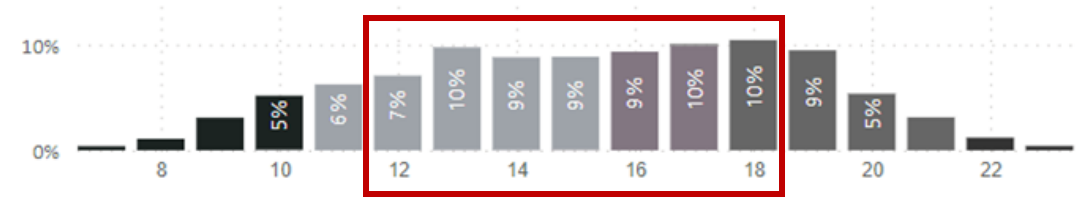


Duration of Visit

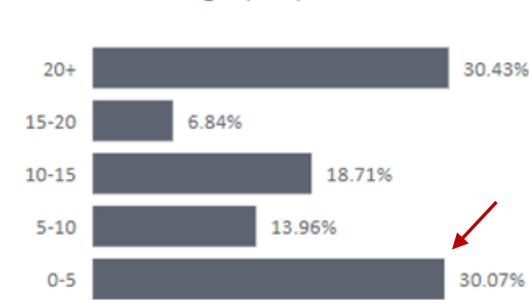


Time of Day

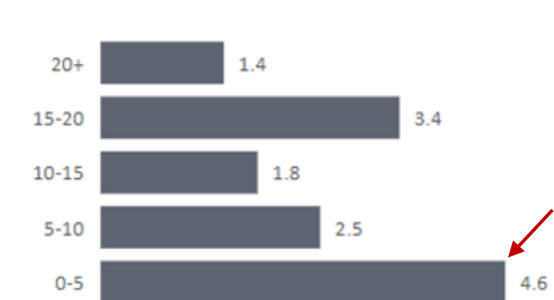
● Afternoon ● Evening ● Lunch Time ● Morning ● Night

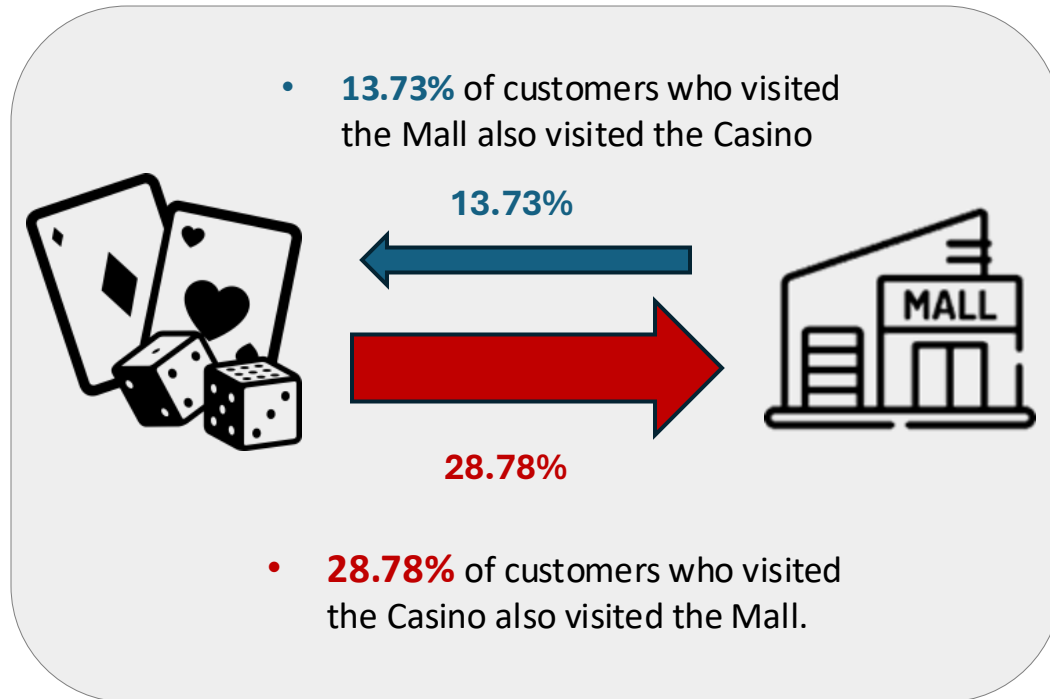


% of Visitors Residing within Drive Distance Range (km)

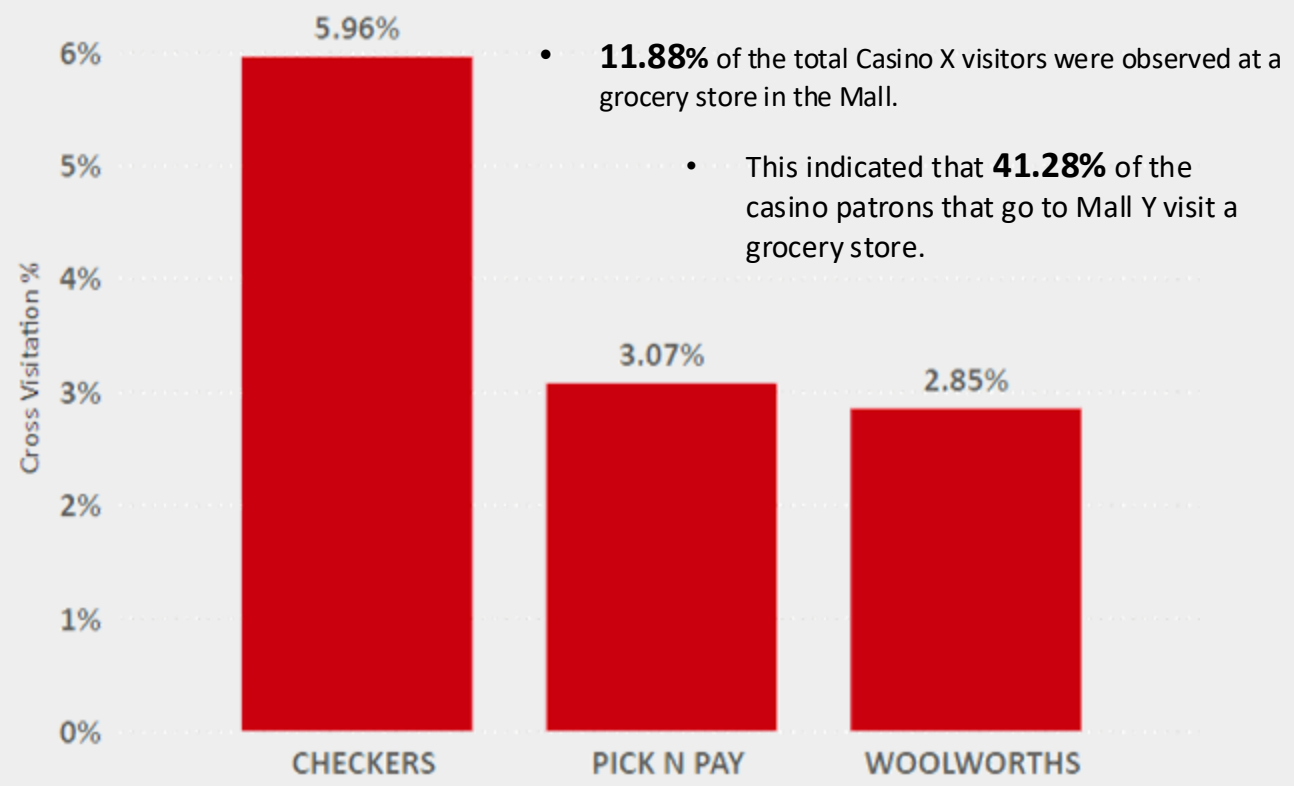


Annual Frequency of Visit per Distance Range (km)





Cross Visitation % from Casino X to Food Grocers Located in Mall Y



Casino X

Mall Y

Checkers

Pick n Pay

Woolworths

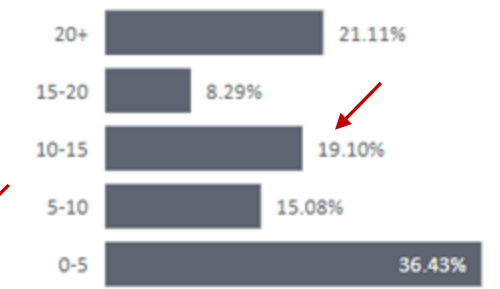
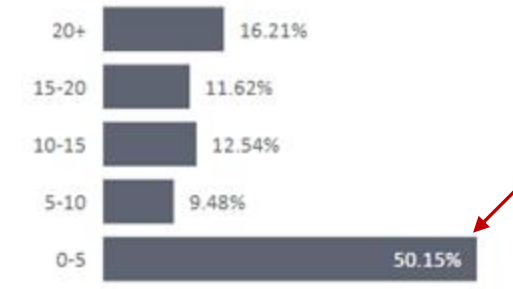
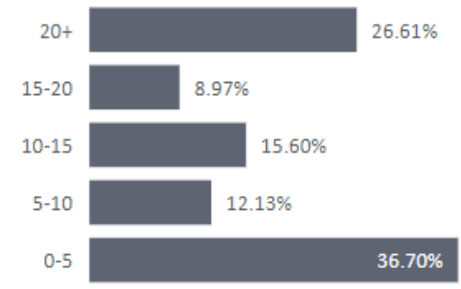
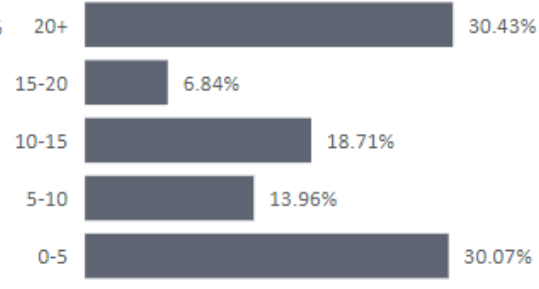
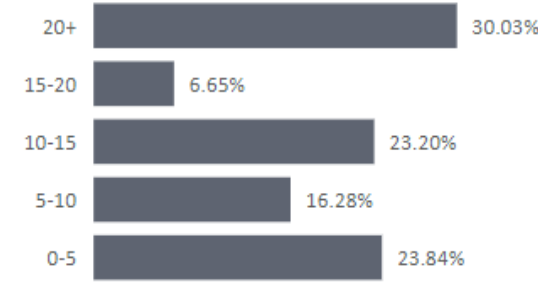
Drive Distance Range

Drive Distance Range

Drive Distance Range

Drive Distance Range

Drive Distance Range



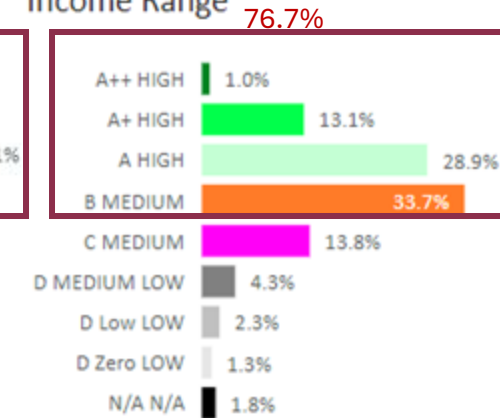
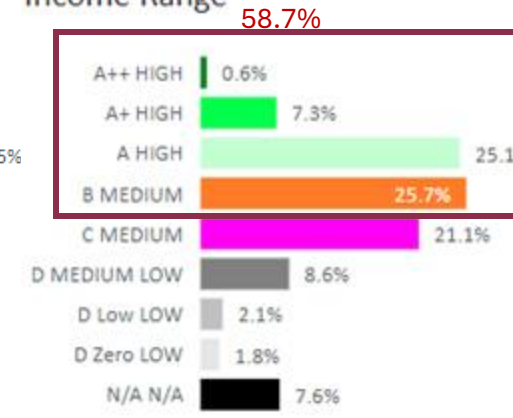
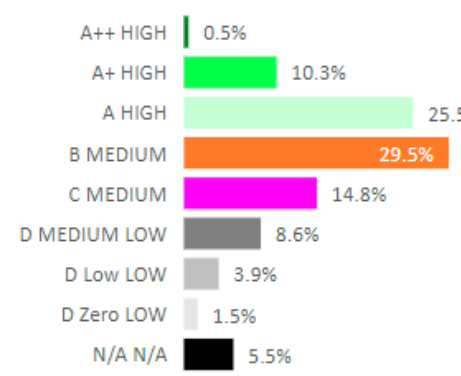
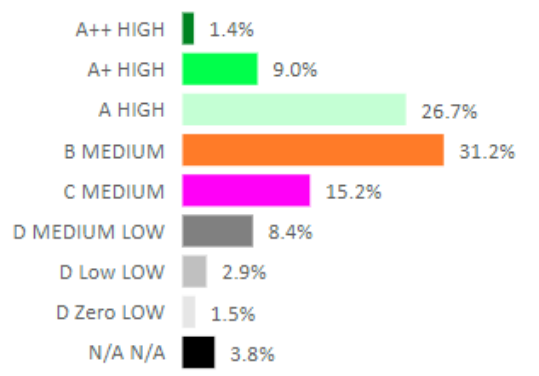
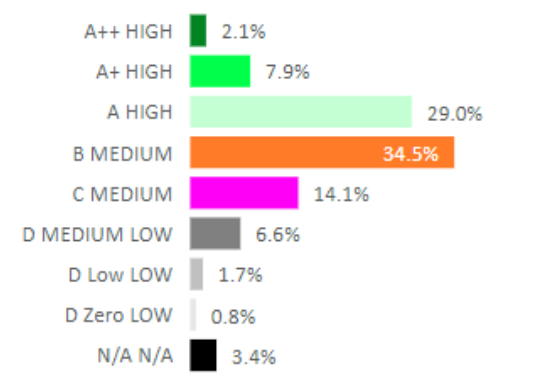
Income Range

Income Range

Income Range

Income Range

Income Range



Insights Summary

- **Matching** our granular household income data with ping data, we can gain a much better understanding of the market supporting a facility
- By analysing the movement of customers, along with their income – we are able to see **frequency** of different income groups visiting the facility:
 - **Travel distance** of visitors
 - **Duration** time spent at facility
- **Cross – Visitation** can show how patrons interact with 2 different facilities, showing the relationship between the facilities
- Determine major **competitors** (outflow)
- **Product improvement** & experience – targeting particular market
- Ultimately advising your marketing, leasing and development strategies, **optimising your asset**



thank
you



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