

OOH MOBILITY TRACKER

INSIGHT INTO CONSUMER MOVEMENT THROUGHOUT
COVID-19 RESTRICTION LEVELS

LOCKDOWN ALERT LEVEL 4

INDUSTRIES PERMITTED TO OPERATE

WHAT'S ALLOWED

All essential services, plus:

Food retail stores, Delivery services, Agriculture, Forestry, Mining, All financial and professional services, Global business services for export markets, Postal and telecommunications services, Fibre optic and IT services & Formal waste recycling.

- Hardware sales are permitted
- Fast food (but only delivery)

WHAT'S NOT ALLOWED

- Selling of alcohol
- Selling of tobacco
- Hairdressers, hotels & guest houses will remain closed

PUBLIC TRANSPORT RESTRICTIONS

WHAT'S ALLOWED

Bus services, taxi services, e-hailing and private motor vehicles may operate at all times of the day, with limitations on vehicle capacity and stringent hygiene requirements.

- Public transport permitted between 05:00 and 19:00, limited to a 70% capacity
- All passengers & drivers must be wearing a mask

WHAT'S NOT ALLOWED

- If you do not have a permit you must stay home from 8pm – 5am.

MOVEMENT RESTRICTIONS

WHAT'S ALLOWED

No inter-provincial movement of people, except for transportation of goods and exceptional circumstances (e.g. funerals).

- Run, cycle or walk (within a 5km radius) between 06:00 – 09:00
- Attend funerals of close relatives
- Work from home

WHAT'S NOT ALLOWED

- If you do not have a permit you must stay home from 8pm – 5am
- Travelling between provinces & outside of SA
- Night vigils / recreational visits



CONSUMER MOBILITY

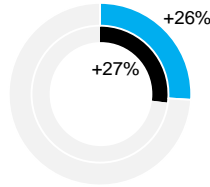
LOCKDOWN ALERT LEVEL 4

CHANGE IN MOBILITY

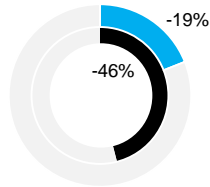
BASED ON LOCKDOWN REGULATIONS

Comparison Periods:

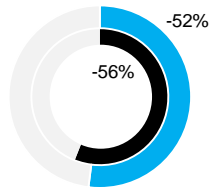
- **Baseline:** Median value for corresponding day of the week, period 3 Jan–6 Feb 2020
- **Level 5:** % change as of 11 April 2020 compared to baseline
- **Level 4:** % change as of 7 May 2020 compared to baseline



-1% Decrease



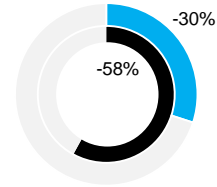
+27% Uplift



+4% Uplift

RESIDENTIAL

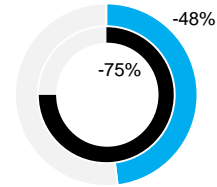
This increase in movement is largely due to consumers moving around to buy essential goods and essential workers still needing to commute to and from work.



+28% Uplift

GROCERY & PHARMACY

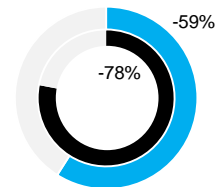
Mobility trends for places like grocery markets, food warehouses, farmers markets, specialty food shops, drug stores & pharmacies.



+27% Uplift

WORKPLACES

Movement is mostly due to essential services workers commuting to and from work.



+19% Uplift

PARKS

Mobility trends for places like national parks, public beaches, marinas, dog parks, plazas, and public gardens.

RETAIL & RECREATION

Mobility trends for places like restaurants, cafes, shopping centres, theme parks, museums, libraries, and movie theatres.

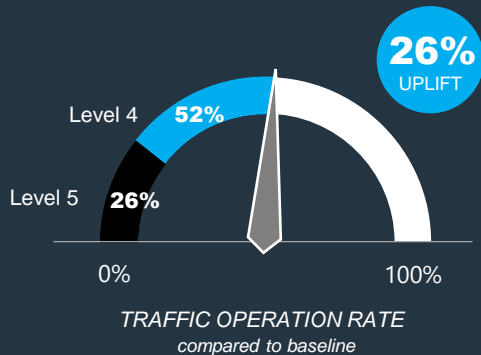
TRANSIT STATIONS

Mobility trends for places like public transport hubs such as bus, taxi and train.



ROADSIDE COMMUTER DASHBOARD

LOCKDOWN ALERT LEVEL 4

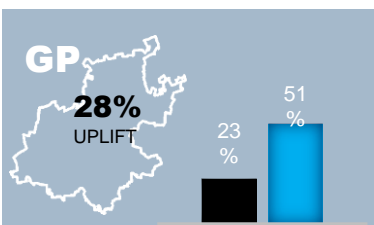


Comparison Periods:

- Prior to Outbreak: 2-8 March 2020 (**Baseline**)
- Lockdown Level 5: 6-12 April 2020
- Lockdown Level 4: 4-10 May 2020

Analysed geographical areas with a JCDecaux footprint (all provinces excl. Northern Cape)

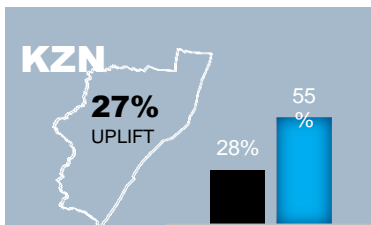
TRAFFIC OPERATION RATE (3 MAIN PROVINCES)



URBAN METRO'S

City of Jhb	45%	↑ 25%
City of Tshwane	55%	↑ 30%
Ekurhuleni	55%	↑ 27%
Emfuleni	54%	↑ 30%
Mogale City	45%	↑ 25%

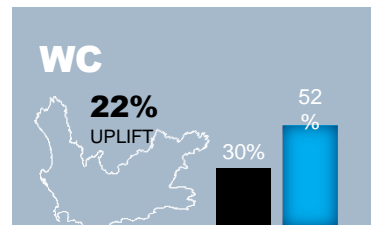
25.3% of SA's population



URBAN METRO'S

eThekweni	54%	↑ 28%
Other Regions	56%	↑ 26%

19.6% of SA's population



URBAN METRO'S

City of CPT	52%	↑ 22%
-------------	-----	-------

11.5% of SA's population

LOCKDOWN
Alert Level 5

Only essential service workers permitted to commute

LOCKDOWN
Alert Level 4

40% of the workforce returning to work. Work from home still enforced.

LOCKDOWN
Alert Level 3

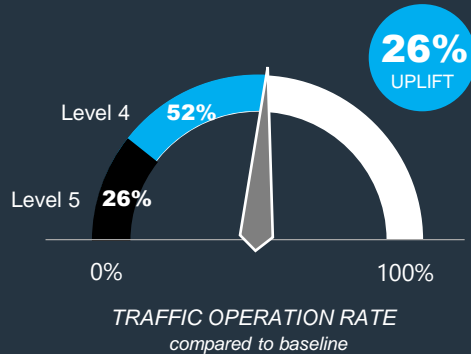
LOCKDOWN
Alert Level 2

LOCKDOWN
Alert Level 1



ROADSIDE COMMUTER DASHBOARD

LOCKDOWN ALERT LEVEL 4

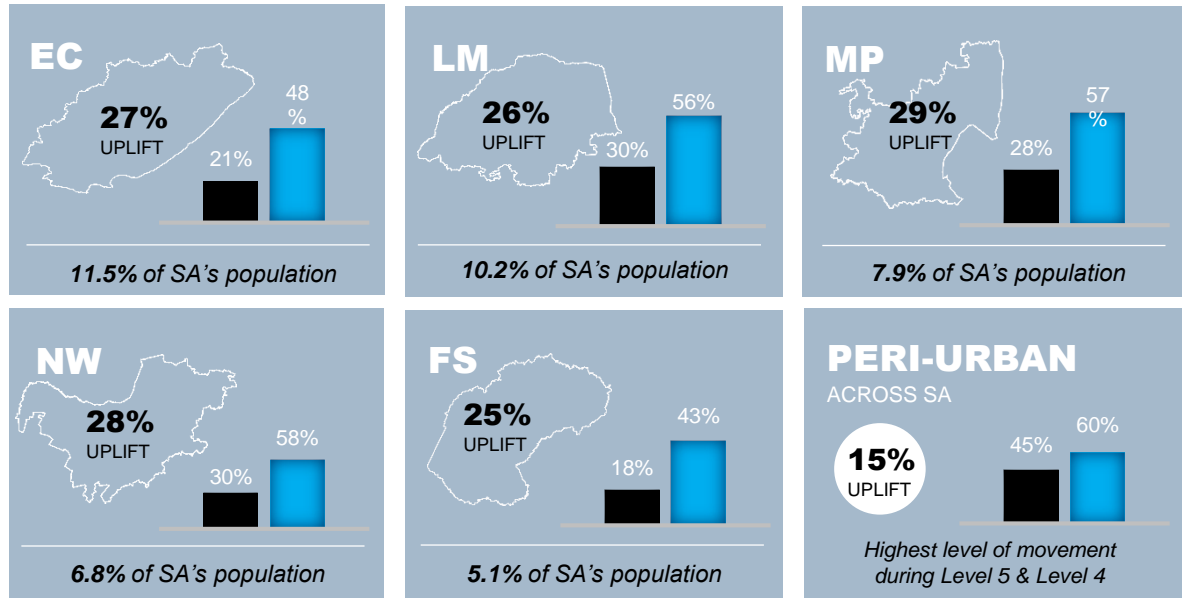


Comparison Periods:

- Prior to Outbreak: 2-8 March 2020 (**Baseline**)
- Lockdown Level 5: 6-12 April 2020
- Lockdown Level 4: 4-10 May 2020

Analysed geographical areas with a JCDecaux footprint (all provinces excl. Northern Cape)

TRAFFIC OPERATION RATE (REST OF SA)



LOCKDOWN
Alert Level 5

Only essential service workers permitted to commute

LOCKDOWN
Alert Level 4

40% of the workforce returning to work. Work from home still enforced.

LOCKDOWN
Alert Level 3

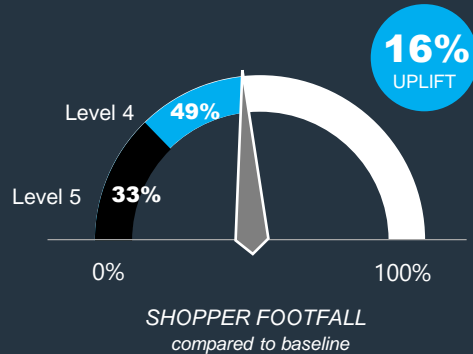
LOCKDOWN
Alert Level 2

LOCKDOWN
Alert Level 1



MALL NETWORK COMMUTER DASHBOARD

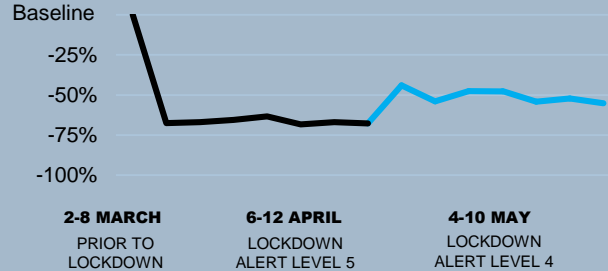
LOCKDOWN ALERT LEVEL 4



Comparison Periods:

- Prior to Outbreak: 2-8 March 2020 (**Baseline**)
- Lockdown Level 5: 6-12 April 2020
- Lockdown Level 4: 4-10 May 2020

Analysed JCDecaux mall network (13 Malls)



ESSENTIAL GOODS & SERVICES

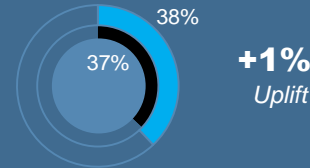
(Stores allowed to trade)

- Food & Healthcare
- Computer & Tech
- Winter clothing
- Hardware products
- Homeware products
- Restaurants (Take-aways)
- Stationary & Educational

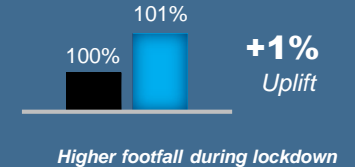
SUPER REGIONAL CENTRES



REGIONAL CENTRES



SMALL REGIONAL CENTRES



LOCKDOWN Alert Level 5

Only essential pharmacy & grocery stores allowed to operate (reduced hours).

LOCKDOWN Alert Level 4

Expansion of the availability of essential goods & services (reduced hours continue).

LOCKDOWN Alert Level 3

LOCKDOWN Alert Level 2

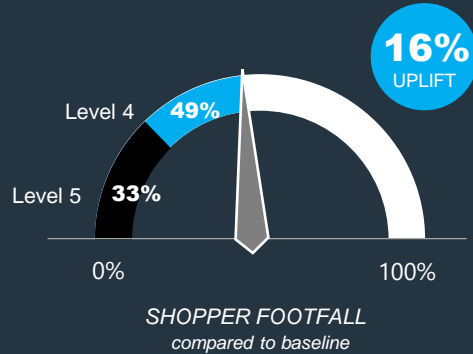
LOCKDOWN Alert Level 1



MALL NETWORK

COMMUTER DASHBOARD

LOCKDOWN ALERT LEVEL 4

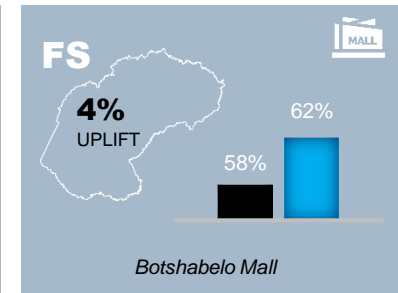
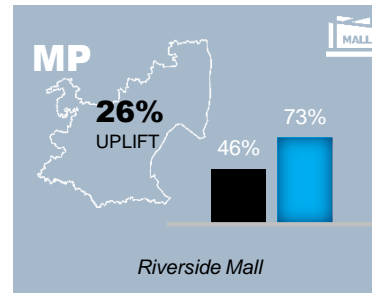
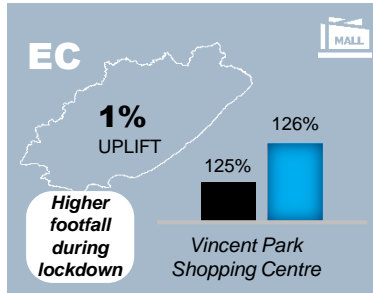
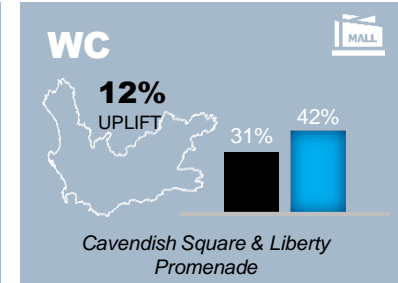
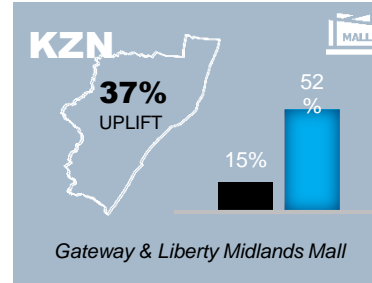
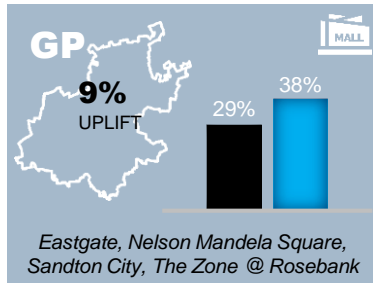


Comparison Periods:

- Prior to Outbreak: 2-8 March 2020 (**Baseline**)
- Lockdown Level 5: 6-12 April 2020
- Lockdown Level 4: 4-10 May 2020

Analysed JCDecaux mall network (13 Malls)

SHOPPER FOOTFALL (BY PROVINCE)



LOCKDOWN
Alert Level 5

Only essential service workers permitted to commute

LOCKDOWN
Alert Level 4

40% of the workforce returning to work. Work from home still enforced.

LOCKDOWN
Alert Level 3

LOCKDOWN
Alert Level 2

LOCKDOWN
Alert Level 1

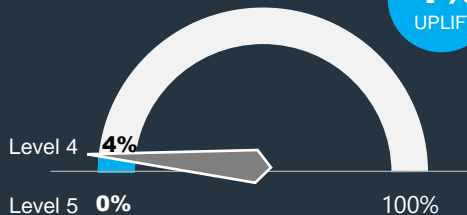


GAUTRAIN COMMUTER DASHBOARD

LOCKDOWN ALERT LEVEL 4

4%

UPLIFT



GAUTRAIN COMMUTERS
compared to baseline
(regular operations – all stations)

Comparison Periods:

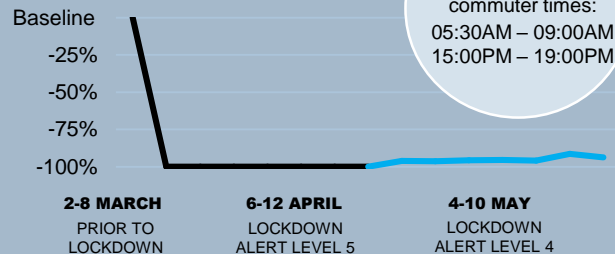
- Prior to Outbreak: 2-8 March 2020 (**Baseline**)
- Lockdown Level 5: 6-12 April 2020
- Lockdown Level 4: 4-10 May 2020

PEAK HOURS

COMPARISON (MON – SUN)

5%

COMMUTERS COMPARED
TO BASELINE
(LIMITED HOURS)



Centurion

-96%

Park

-93%

Hatfield

-95%

Pretoria

-91%

Marlboro

-92%

Rhodesfield

-95%

Midrand

-94%

Rosebank

-96%

OR Tambo

*Not operational
from 27 March.*

Sandton

-97%

COMMUTERS COMPARED TO BASELINE (PEAK HOURS)

LOCKDOWN
Alert Level 5

Gautrain
services not
operational.

(27 Mar–3 May 2020)

LOCKDOWN
Alert Level 4

Operational
services with
limited hours.

(From 4 May 2020)

LOCKDOWN
Alert Level 3

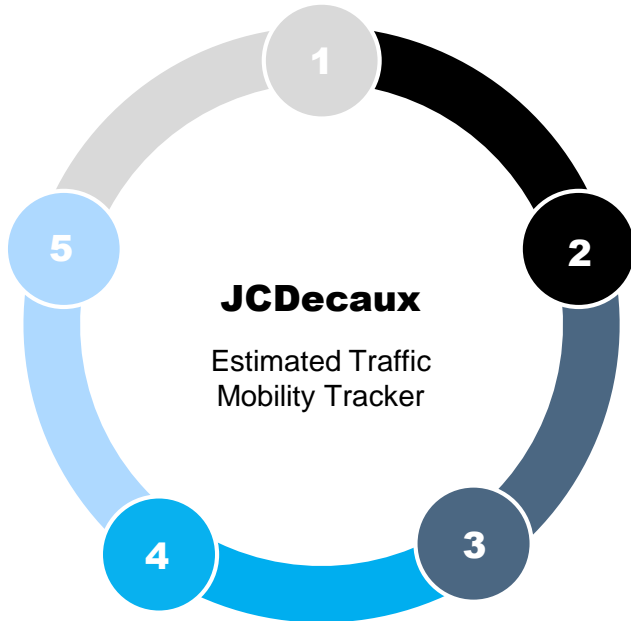
LOCKDOWN
Alert Level 2

LOCKDOWN
Alert Level 1

METHODOLOGY

ROAD TRAFFIC ANALYSIS

The building blocks for calculating the estimated traffic mobility per geographic area.



1

JCDecaux Roadside Inventory

Analysed Geographical areas with a JCDecaux footprint.

2

Audience Base Data (Before Lockdown)

OMC ROAD - Roadside Outdoor audience data

3

Dynamic Traffic Trend Data

Sources: Geo-Int | Lightstone | Google Mobility Tracker

4

Data Source Fusion

Aggregation of traffic changes province, metro and peri-urban areas.

5

Application of Estimated Traffic Mobility

JCDecaux Internal - GIS Insights Team

THANK YOU

The information and contents of this document is only for the intended recipient and may not be used, published or distributed without the prior express written consent of JCDecaux. Where reuse of this document is authorized by JCDecaux in writing, such reuse shall be subject to inter alia the appropriate attributions and acknowledgments. The opinions expressed in this document are in good faith and such opinions may have been based on or derived from several sources, including online sources, as referenced in the document, and JCDecaux makes no representations and gives no warranties of whatever nature in respect of the content of this document, including but not limited to, the accuracy or completeness of any information, facts and/or opinions contained herein. Where this document contains references or hyperlinks to websites or sources, JCDecaux is not responsible for, inter alia, the content or availability of these websites or sources. JCDecaux, its affiliates and subsidiaries, and their respective directors, employees and agents, will not be held liable under any circumstances for the use of and/or reliance on the contents, opinions, estimates, forecasts and findings in this document. Any use of and/or reliance on the contents of this document is done so entirely at your own risk.