

OOH MOBILITY TRACKER

INSIGHT INTO CONSUMER MOVEMENT THROUGHOUT
COVID-19 RESTRICTION LEVELS

LOCKDOWN ALERT LEVEL 3.1



STRICTER LOCKDOWN RULES NOT ON THE CARDS FOR GAUTENG

The provincial executive committee met over the weekend but spokesperson Thabo Masebe said that it **did not discuss the prospect of Gauteng moving back to a hard lockdown.**

*“We did not even discuss a hard lockdown. What we discussed as the provincial government is that we fully appreciate and support the strategy that is being implemented, the risk-adjusted and we also understand that **under level 3 lockdown, we should allow the economy to reopen.**”*

*Alexander Forbes chief economist Isaiah Mhlanga thinks it will be difficult for government to go back to a hard lockdown. **“It would hurt the economy further, it would be to the detriment to the fiscus and livelihoods of people,”** he said. Mhlanga noted that hospitals are already full, and infection cannot necessarily be controlled by a lockdown.*

LOCKDOWN ALERT LEVEL 3.1

INDUSTRIES PERMITTED TO OPERATE

WHAT'S ALLOWED

Full reopening of the retail sector

Sale of alcohol Mon - Thu

Re-opening of cinemas, sit-in at restaurants, theatres and casinos – subject to adherence to all health protocols

Personal care services, including hairdressing, beauty treatments, make -up, nail salons, piercing and tattoo parlours

WHAT'S NOT ALLOWED

The consumption of alcohol at or in a place of sale

Sale of tobacco

Tourist attractions and entertainment activities

Conferences and events

Short term home-sharing /letting/leasing/rental for leisure purposes

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

New directives which allow for increased travelling:

- Approved inter-provincial travel to use long-distance public transport (permit is required)
- Airports re-open for necessary domestic business travel from 15 June
- PRASA routes reopen

WHAT'S NOT ALLOWED

Domestic passenger air travel for leisure purposes & all international passenger flights

MOVEMENT RESTRICTIONS

WHAT'S ALLOWED

Schools re-open for all grade 7 & 12 learner - other grades will be staggered, with some students returning 6 July and the rest on 3 August

People may only leave their homes for work, to procure groceries and essential services, exercise or perform any of the other activities permitted under Level 3

- Run, cycle or walk exercise times will now be between 06:00 – 18:00
- More than 8 Million people return to work
- Work from home is still encouraged
- Partial reopening of places of worship

WHAT'S NOT ALLOWED

Visiting with family and friends

Exercising in groups

Attending large gatherings



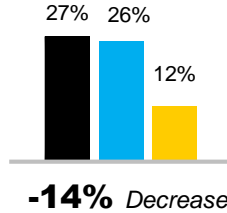
CONSUMER MOBILITY

LOCKDOWN ALERT LEVEL 3.1

CHANGE IN MOBILITY

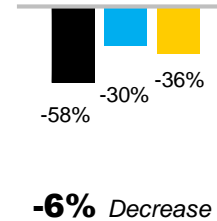
Comparison Periods:

- Baseline: Median value for corresponding day of the week, period 3 Jan–6 Feb 2020
- Level 5: % change as of 11 April 2020
- Level 4: % change as of 7 May 2020
- Level 3: % change as of 27 June 2020



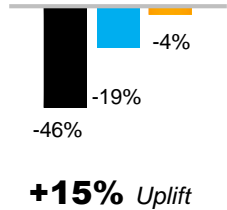
RESIDENTIAL

We are still seeing an increase in residential movement as consumers are moving around to shop closer to home and to commute to work.



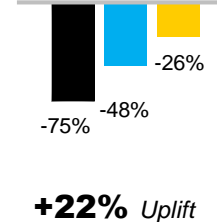
PARKS

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



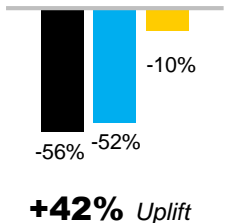
GROCERY & PHARMACY

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



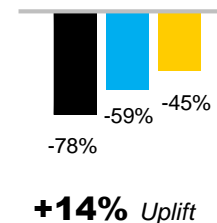
RETAIL & RECREATION

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



WORKPLACES

The majority of the workforce is back at work and back on the roads, with work from home & flexi-hours still encouraged.



PUBLIC TRANSPORT

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

ROAD COMMUTERS

LOCKDOWN ALERT LEVEL 3.1

KEY CHANGES

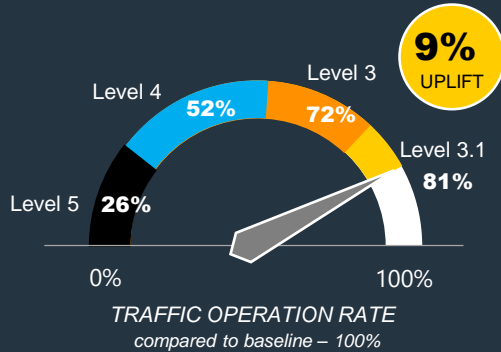
- With the easing of lockdown rules, public transit use and driving is increasing as people step out of confinement and move around again
- Traffic operation rate is tracking at **81%** compared to baseline
- **Workplace mobility is tracking at 90%**, Google Mobility reports workplaces to be down only 10% compared to the base period
- **Mpumalanga** has the **highest traffic operation rate**, reaching 86% in advanced lockdown level 3
- We are seeing the **biggest uplift in traffic in the North West**, at 14%
- Traffic operation rate in **peri-urban areas** is almost back to “normal”, tracking at **92%**





ROADSIDE COMMUTER DASHBOARD

LOCKDOWN ALERT LEVEL 3.1

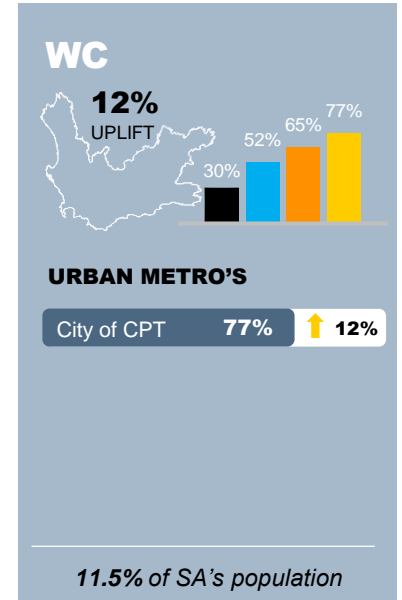
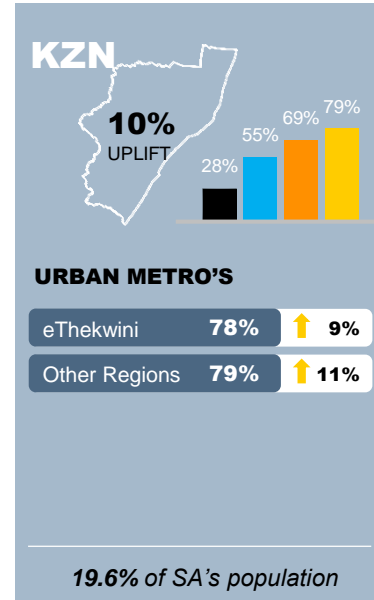
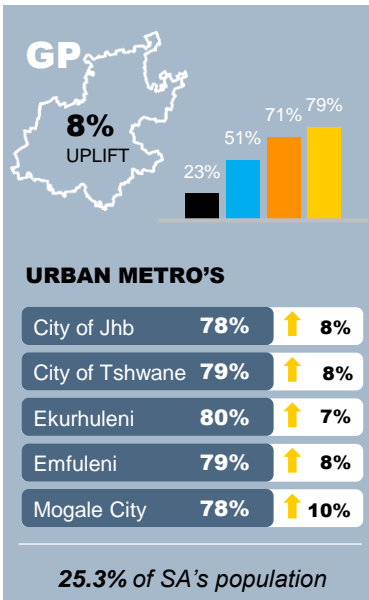


Comparison Periods:

- Prior to Outbreak: 2-8 March 2020 (**Baseline**)
- Lockdown Level 5: 6-12 April 2020
- Lockdown Level 4: 4-10 May 2020
- Lockdown Level 3: 1-7 June 2020
- Lockdown Level 3.1: 1-7 July 2020

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

TRAFFIC OPERATION RATE (3 MAIN PROVINCES)



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 3.1

With the easing of lockdown rules, people are moving around more often.

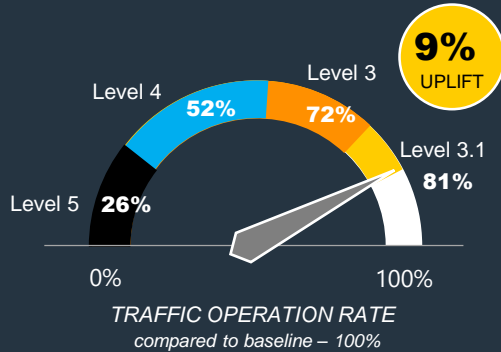
LOCKDOWN
Alert Level 2

LOCKDOWN
Alert Level 1



ROADSIDE COMMUTER DASHBOARD

LOCKDOWN ALERT LEVEL 3.1

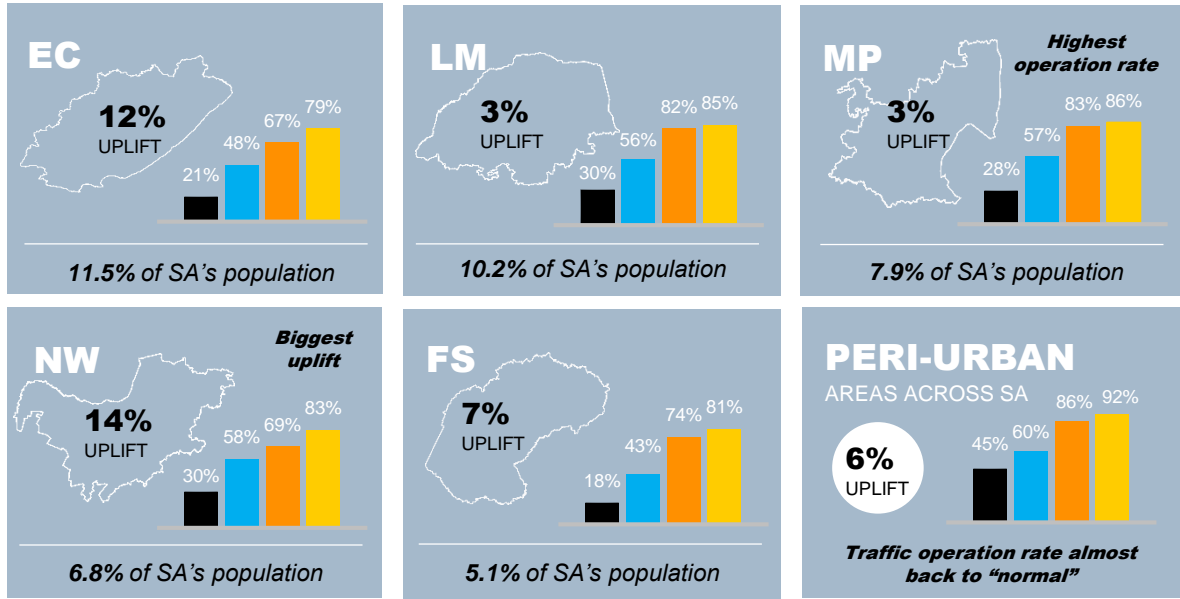


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Analysed geographical areas with a JCDecaux footprint (all provinces excl. Northern Cape)

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 3.1

With the easing of lockdown rules, people are moving around more often.

LOCKDOWN
Alert Level 2

LOCKDOWN
Alert Level 1

MALL SHOPPER FOOTFALL

LOCKDOWN ALERT LEVEL 3.1

KEY CHANGES

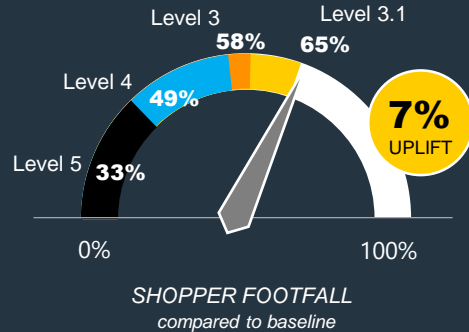
- Shopper Footfall is now tracking at **65% compared to the baseline**, a **7% uplift** from Level 3 shopper analysis
- Impacted by the **relaxed lockdown rules from the 1st of July**, allowing cinemas & restaurants to operate subject to adherence to health protocols
- Continuous increase in shoppers across super-regional, regional & small regional centres
 - **Small regional centres are tracking at 98%** of footfall compared to the base period
- **Western Cape has the highest uplift** in shopper footfall, at **15%**
- Vincent Park, Eastern Cape, continues to have more shoppers during lockdown
 - **19% more shoppers compared to baseline**





MALL NETWORK COMMUTER DASHBOARD

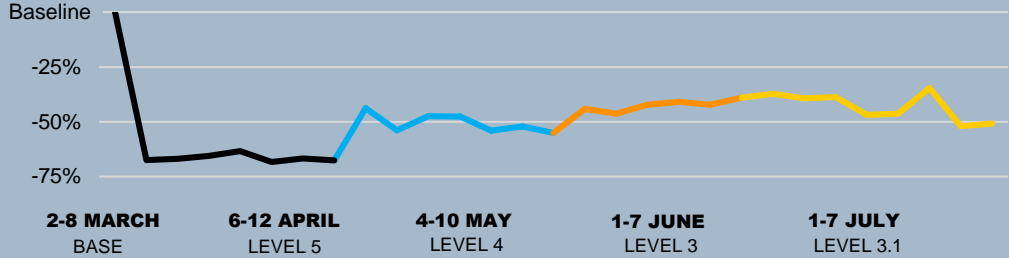
LOCKDOWN ALERT LEVEL 3.1



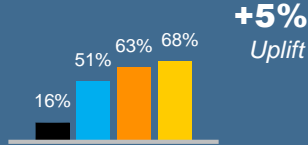
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Analysed JCDcaux mall network (13 Malls)

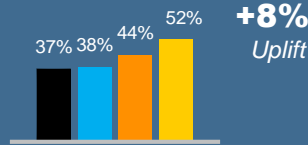


SUPER REGIONAL CENTRES



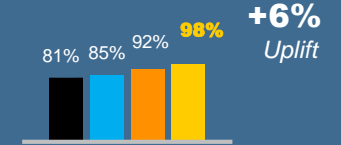
Continuous increase in shopper footfall.

REGIONAL CENTRES



Biggest uplift in shopper footfall during Level 3.1.

SMALL REGIONAL CENTRES



Highest Shopper Footfall. Almost achieving baseline.

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 3.1

Relaxed lockdown rules from the 1st of July, allowing cinemas & restaurants to operate subject to adherence to health protocols.

LOCKDOWN Alert Level 2

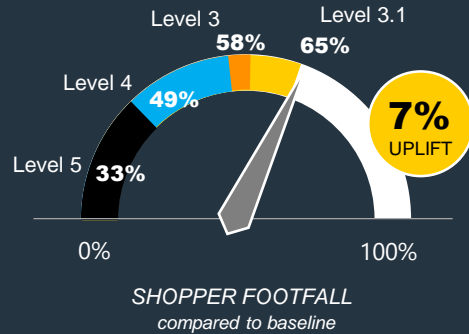
LOCKDOWN Alert Level 1



MALL NETWORK

COMMUTER DASHBOARD

LOCKDOWN ALERT LEVEL 3.1

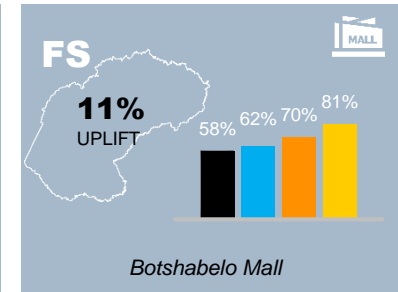
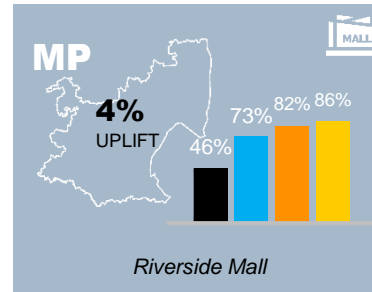
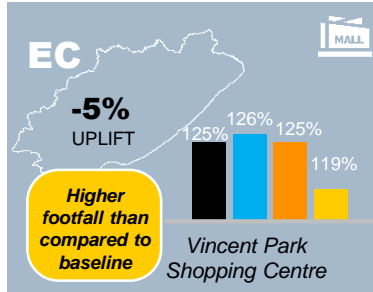
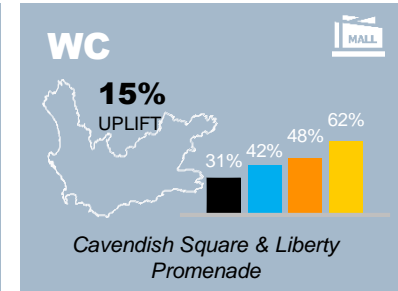
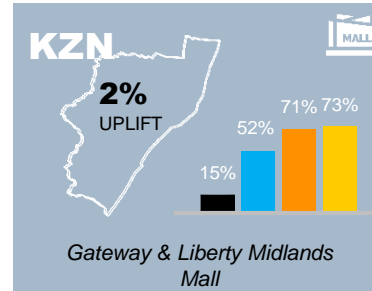
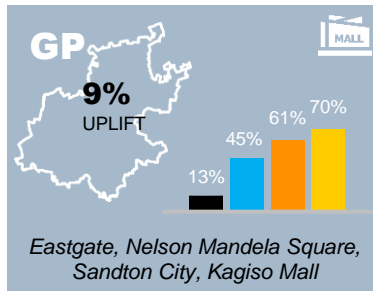


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Analysed JCDecaux mall network (13 Malls)

SHOPPER FOOTFALL (BY PROVINCE)



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 3.1

Relaxed lockdown rules from the 1st of July, allowing cinemas & restaurants to operate subject to adherence to health protocols.

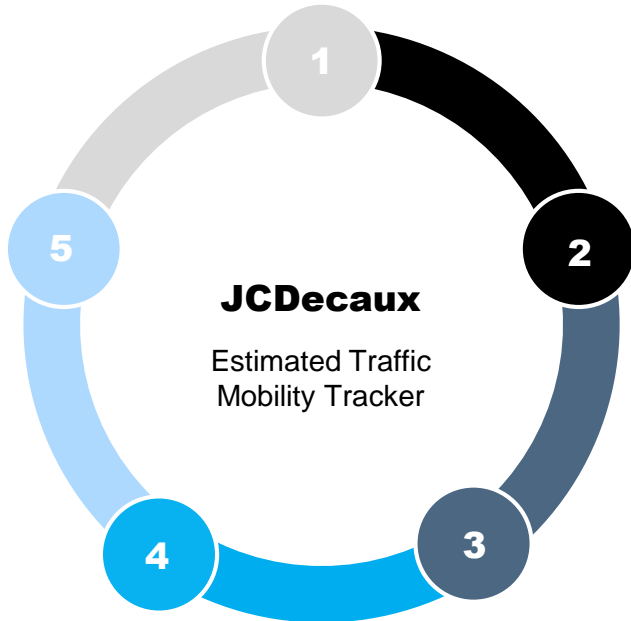
LOCKDOWN
Alert Level 2

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

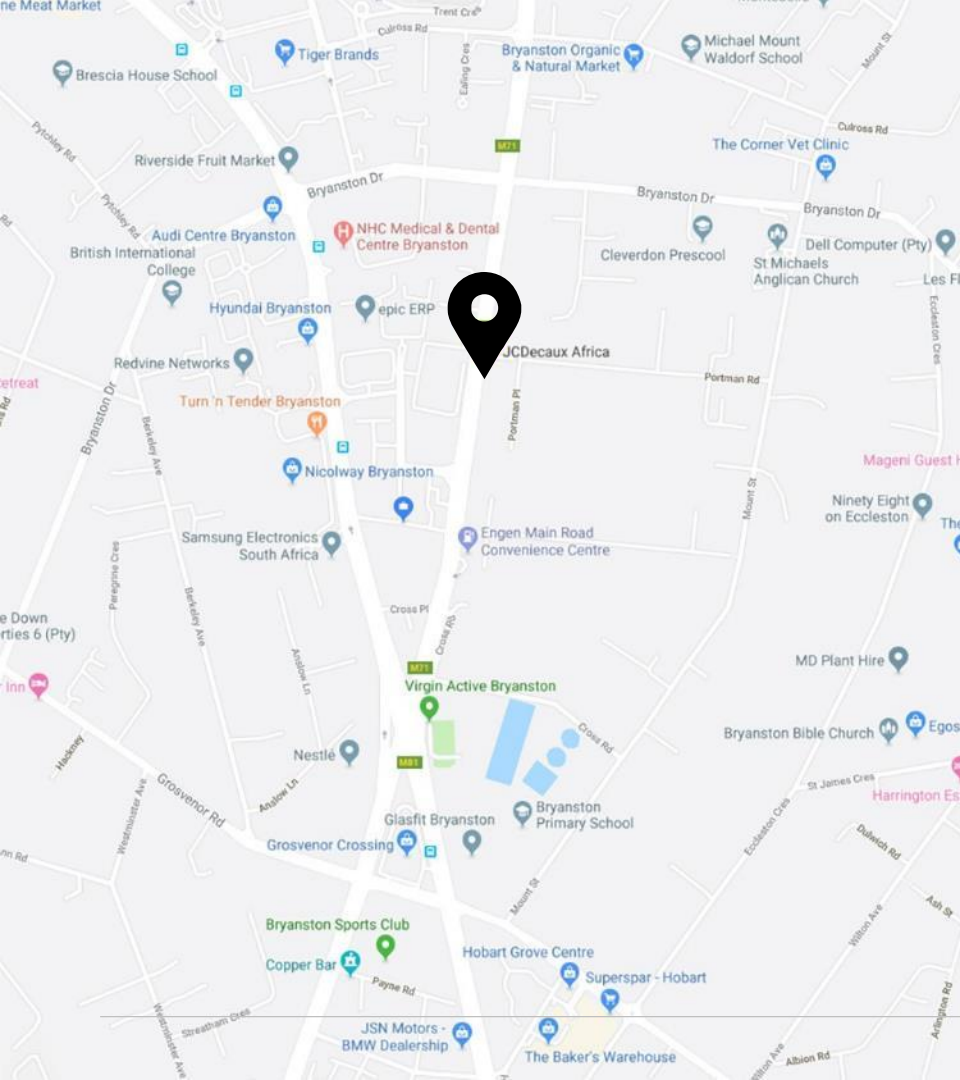
Data Source Fusion

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

5

Application of Estimated Traffic Mobility

JCDecaux Internal - GIS Insights Team



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