

# OOH MOBILITY TRACKER

INSIGHT INTO CONSUMER MOVEMENT THROUGHOUT  
COVID-19 RESTRICTION LEVELS

**LOCKDOWN ALERT LEVEL 3**

# LOCKDOWN ALERT LEVEL 3

## INDUSTRIES PERMITTED TO OPERATE

### WHAT'S ALLOWED

Full reopening of the retail sector

Sale of alcohol Mon - Thu

Restaurants for delivery or collection of food only

### WHAT'S NOT ALLOWED

The consumption of food and beverages at or in a place of sale.

Sale of tobacco

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

Tourist attractions, casinos 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 (only the 4 majors: ORTIA, Lanseria International, CTIA, KSIA)
- 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

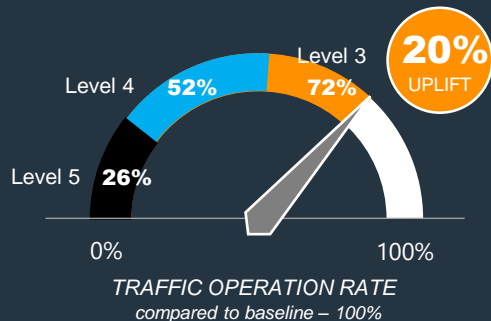
Exercising in groups

Attending large gatherings



## ROADSIDE COMMUTER DASHBOARD

### LOCKDOWN ALERT LEVEL 3



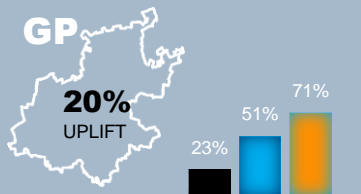
**Significant increase in traffic from Fri 5 June.  
Highest traffic over weekends (Fri-Sun).**

#### 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: 4-10 June 2020

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

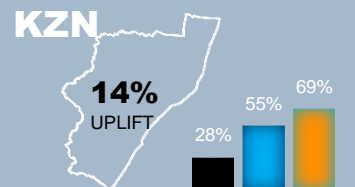
## TRAFFIC OPERATION RATE (3 MAIN PROVINCES)



#### URBAN METRO'S

City of Jhb	70%	↑ 25%
City of Tshwane	72%	↑ 17%
Ekurhuleni	73%	↑ 18%
Emfuleni	72%	↑ 18%
Mogale City	69%	↑ 24%

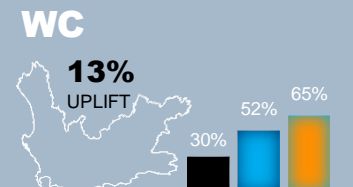
25.3% of SA's population



#### URBAN METRO'S

eThekweni	69%	↑ 15%
Other Regions	68%	↑ 12%

19.6% of SA's population



#### URBAN METRO'S

City of CPT	65%	↑ 13%
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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

Additional 8 Million  
workers return from  
the 1<sup>st</sup> of June.  
Work from home  
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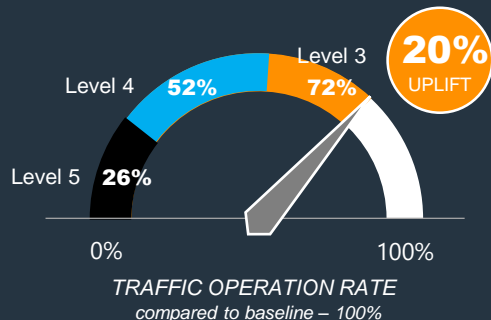
**LOCKDOWN**  
Alert Level 2

**LOCKDOWN**  
Alert Level 1



## ROADSIDE COMMUTER DASHBOARD

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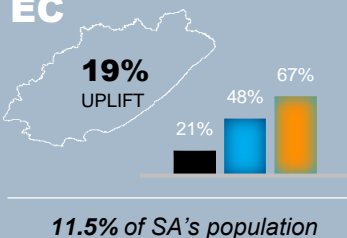
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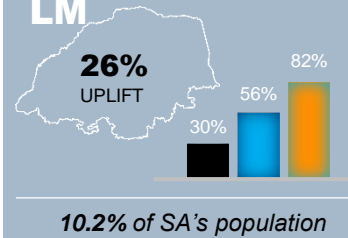
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## TRAFFIC OPERATION RATE (REST OF SA)

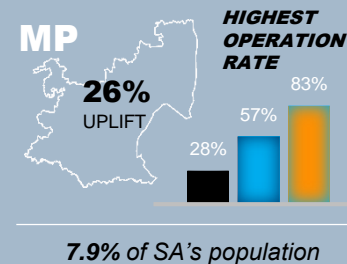
### EC



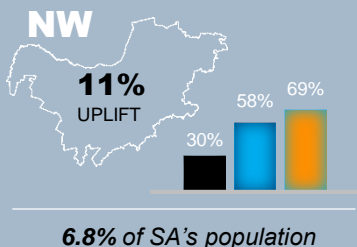
### LM



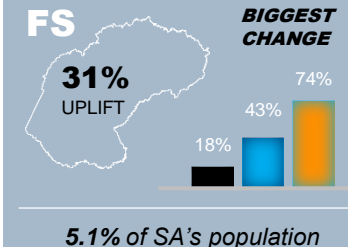
### MP



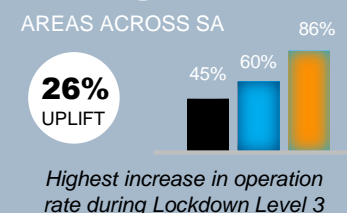
### NW



### FS



### PERI-URBAN AREAS ACROSS SA



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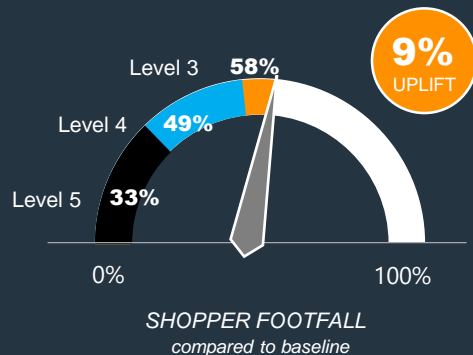
#### LOCKDOWN Alert Level 2

#### LOCKDOWN Alert Level 1



## MALL NETWORK COMMUTER DASHBOARD

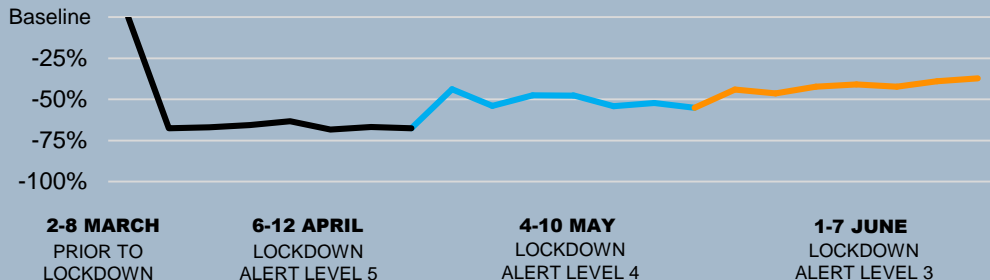
### LOCKDOWN ALERT LEVEL 3



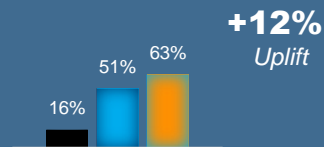
#### Comparison Periods:

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Analysed JCDecaux mall network (13 Malls)

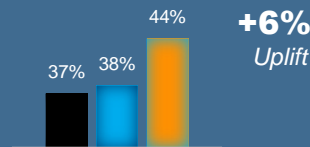


#### SUPER REGIONAL CENTRES



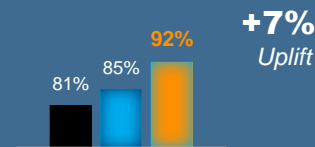
*Biggest uplift in shopper footfall during Level 4.*

#### REGIONAL CENTRES



*Biggest uplift in shopper footfall during Level 3.*

#### 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

Additional 8 Million workers return from the 1<sup>st</sup> of June. Work from home still encouraged.

#### LOCKDOWN Alert Level 2

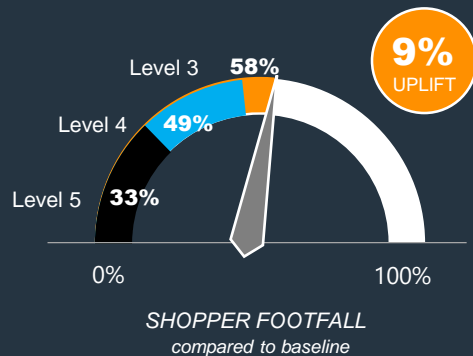
#### LOCKDOWN Alert Level 1





## MALL NETWORK COMMUTER DASHBOARD

### LOCKDOWN ALERT LEVEL 3

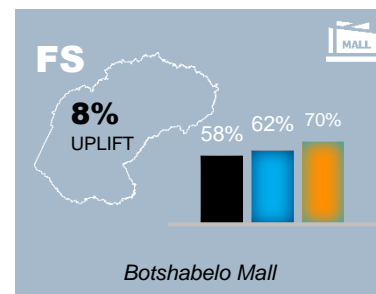
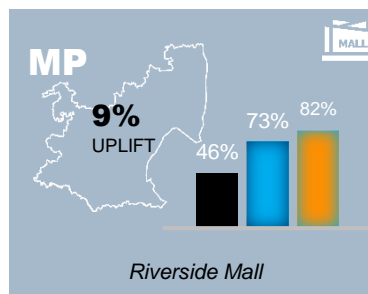
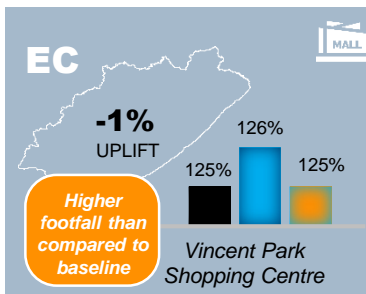
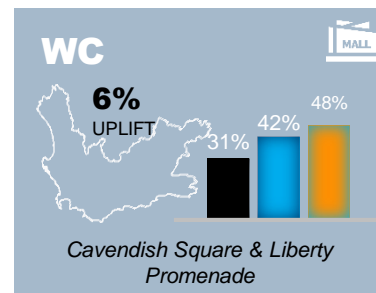
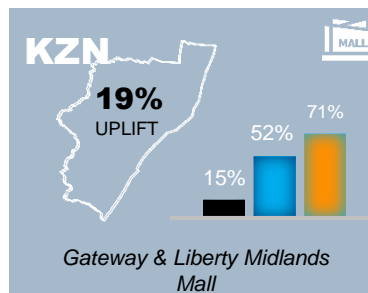
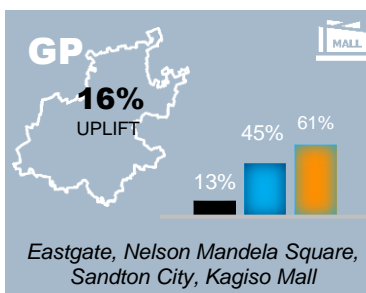


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Analysed JCDecaux mall network (13 Malls)

## 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

Full reopening of the retail sector with stringent health protocols in place.

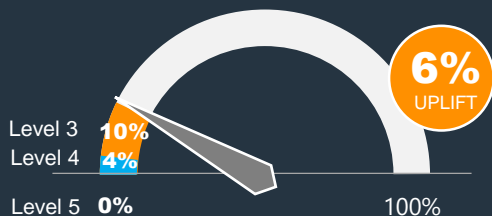
#### LOCKDOWN Alert Level 2

#### LOCKDOWN Alert Level 1



# GAUTRAIN COMMUTER DASHBOARD

## LOCKDOWN ALERT LEVEL 3



### GAUTRAIN COMMUTERS

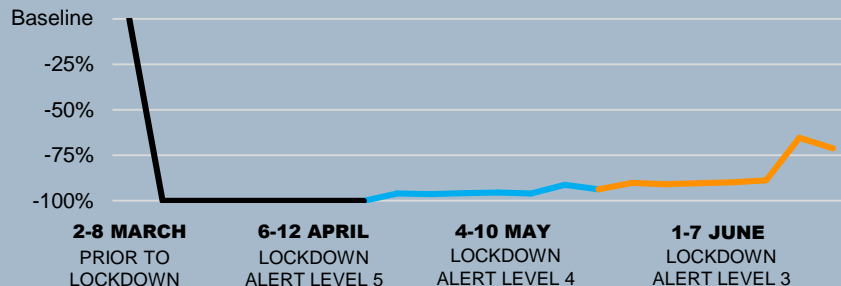
compared to baseline  
(regular operations – all stations)

± 125 000 commuters for the month of May  
(Level 4)

± 65 000 commuters in the 1st week of June  
(Level 3)

### Comparison Periods:

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NB TO NOTE: VARYING  
OPERATIONAL TIMES

### 4-19 May - Peak hours

05:30-09:00 AM  
& 15:00-19:00 PM

### 20-31 May - Daily

05:30-19:00

### From 1 June - Daily

05:30-20:30

## COMMUTERS

COMPARED TO BASELINE

Centurion	9%	↑ 5%	Hatfield	10%	↑ 6%	Marlboro	16%	↑ 10%
Midrand	12%	↑ 7%	Park	13%	↑ 8%	Pretoria	17%	↑ 10%
Rhodesfield	10%	↑ 6%	Rosebank	8%	↑ 5%	Sandton	7%	↑ 4%

OR Tambo - Not operational from 27 March.

**LOCKDOWN**  
Alert Level 5

Gautrain  
services not  
operational.

(27 Mar–3 May 2020)

**LOCKDOWN**  
Alert Level 4

Operational  
services with  
limited hours daily.

(4-31 May 2020)

**LOCKDOWN**  
Alert Level 3

Operating daily  
from 05:30 to  
20:30.

(From 1 June 2020)

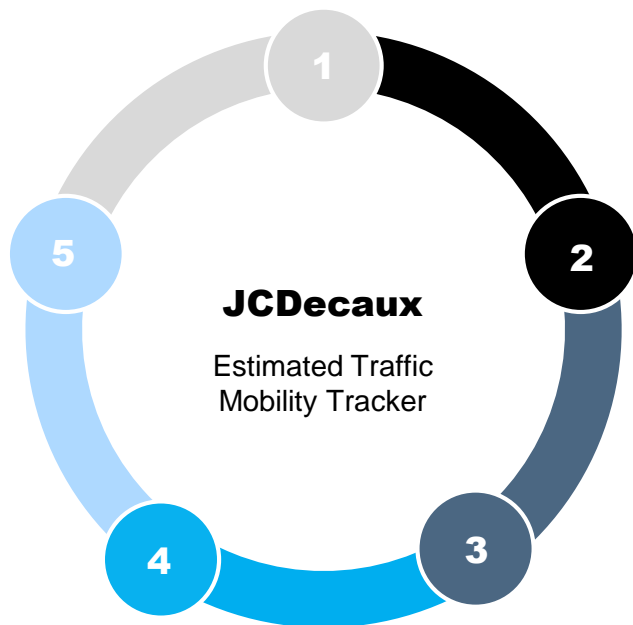
**LOCKDOWN**  
Alert Level 2

**LOCKDOWN**  
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# 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

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