

VISTARMEDIA

Supporting Our Partners During COVID-19



If people are spending less time outside, how should this impact my OOH strategy?

We understand. “Stay at home” and “out-of-home media” don’t seem to go well together.

In reality, your audience hasn’t vanished - but they may have changed their behaviours. We are actively analysing data from a variety of sources to try and understand that change more accurately. Initial analysis suggests an increase in consumer time spent at certain locations as well as a huge amount of variability in how different geographic areas are being impacted [see “Location Data Analysis” for more details].

Because Vistar has access to the widest array of DOOH inventory and broad geographic coverage, we can work with you to shift targeting and budgets away from highly restricted/impacted locations to areas where there is still an opportunity to engage your consumers.





Conditions are likely to keep changing, sometimes rapidly. Do you offer a flexible solution so my brand can adjust strategy based on conditions in the future?

One of the biggest benefits of activating out-of-home programmatically is flexibility. With Vistar, you can easily adapt a strategy, whether that means shifting budget to locations that are less impacted, removing venue types that have restrictions placed on them, or choosing to pause/postpone a campaign. You are never locked in to a particular strategy or commitment.

We're working to provide clients as much proactive information as possible as things change, so we can work together to adapt your programs throughout this time of uncertainty. This provides you the flexibility to reactivate seamlessly as consumer behavior, demand and situational context evolve. Jumping on opportunities quickly can give an edge to brands in the market, so we recommend maintaining your ability to relaunch quickly.

How are impressions and CPMs being impacted by changes in consumer behavior?

The impression data in the Vistar platform comes directly from our media owner partners, and relies on data from credible industry auditing groups, such as MOVE. These groups analyse data over lengthy periods of time to determine impression metrics, so it is likely that any immediate changes in consumer behaviour may not be reflected right away. Certain media owners are proactively adjusting their impressions based on individually available data (such as credit card transactions).

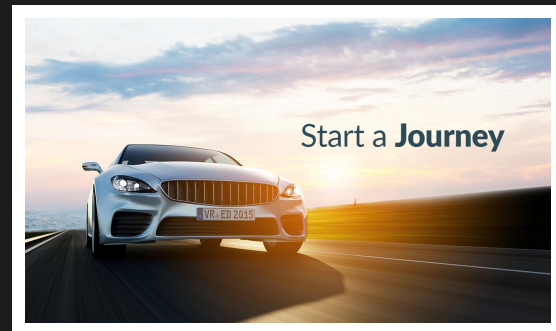
While there is no playbook on how to navigate this situation, we are confident that the auditing bodies, media owners and Vistar are taking every step possible to provide accurate, reliable data. In the meantime, our team is available to make recommendations about adapting campaign targeting if you have concerns about any current set up.



Make the Most of Your Assets

Only two creative sizes are required to access over 6,100 digital out-of-home screens and 250 million monthly impressions:

- Doctor's offices
- Pharmacies
- Petrol stations
- Supermarkets
- Food courts



Only 2 DOOH sizes are required, static or video:

- 1080x1920 (9:16)
- 1920x1080 (16:9)

Enjoy the Uniqueness of DOOH



EFFICIENCY

Eliminate media waste and loss of ROI, as Vistar only serves ads when and where your audience is Most likely to be. Minimising wastage is even more critical during economic downturn.



VARIETY

Extend your campaigns across a variety of venues that are still open, such as supermarkets, shopping centres, office buildings, banks, petrol stations, pharmacies and convenience stores.



FLEXIBILITY

Vistar empowers clients to best 'stagger their comeback.' Our platform never locks you into a particular strategy/commitment and allows you to shift budgets or pause/postpone campaigns.

AUSTRALIA MEDIA OWNER DATA ANALYSIS

Shopper Media

SHOPPING CENTRES



Shopper Media's supermarket-centric 'essential retail' centres have experienced higher than normal footfall and repeat visitations in recent weeks.



Footfall has increased 6.8% in the last 4 weeks and is up 38% on what they generally see in the week leading up to Christmas!



The weekend March 27-29 saw a softening of visitation to more normal levels in line with changing social guidelines.

Val Morgan Outdoors

SHOPPING CENTRES & PETROL STATIONS

5%

increase in audiences in
on-the-go locations as petrol
and convenience products remain
'essential'

12.7%

increase in traffic to its
homemaker shop locations
in the week 22-29 March,
compared to 26 Jan-29 Feb

5.6^K

digital screens in proximity
to supermarket, pharmacy
and convenience stores
during this time

Tonic Health Media

GP WAITING ROOMS & PHARMACIES



16MM

consumers are visiting Tonic's owned media channels (OOH Health & Wellbeing environments)

Globally, medical environments and pharmacies have remained open during this pandemic as a vital support for the community. As Australian cities face lockdown, Tonic is also assisting companies to communicate their health and advertising messages in these healthcare and online environments.

ADDITIONAL RECOMMENDATIONS

Create a Positive Connection

With consumers experiencing high degrees of uncertainty and stress, there is an opportunity to tailor your creative messaging to create an emotional connection with your consumer.

ENHANCE MOMENTS OF RELIEF

While many advertising contexts are highly negative at the moment (news, social media, etc.), the times when consumers are outside the house may be moments of relief — taking a drive, taking a walk, even grocery shopping.

Leverage your creatives to provide messages of positivity and hope, building a positive association with your brand.

HELP THE RETURN TO NORMALCY

When the pandemic recedes, there will be a deep psychological connection to those moments returning to normalcy.

Activating quickly and integrating your brand with positive creative messaging will be an opportunity to forge a unique connection with your consumers.

The background of the slide is a dark, stylized map of a city grid. Overlaid on this map are seven red circles, each containing a white icon of a storefront with a awning. The circles are distributed across the left and center portions of the slide, with one circle in the top left, one in the top right, one in the middle left, one in the middle center, one in the middle right, one in the bottom left, and one in the bottom center.

Conquest Your Competition

Data from IRI reveals an interesting pattern of consumer behavior, showing spikes across all brands during a crisis period (for example, a hurricane) — but a decrease in sales for larger, name brands and an increase in smaller brands and private labels in the ensuing months.

This is an opportunity for competitive conquering across several industries, such as CPG, food and beverage, etc. — with economic uncertainty driving decreased brand loyalty and increased sales for small labels and private brands. Awareness campaigns for these brands can help brands capitalize on this behavior as well as influence point-of-purchase decisions.

Reinforce Self-Care

Data from IRI also reveals that consumers are purchasing in areas that enhance the at-home experience. This includes both entertainment offerings as well as wellness and DIY.

Tailoring creative to highlight the at-home experience and encouraging consumers to enjoy their time while following social distancing guidelines can promote your products as well as generate positive awareness of your brand.

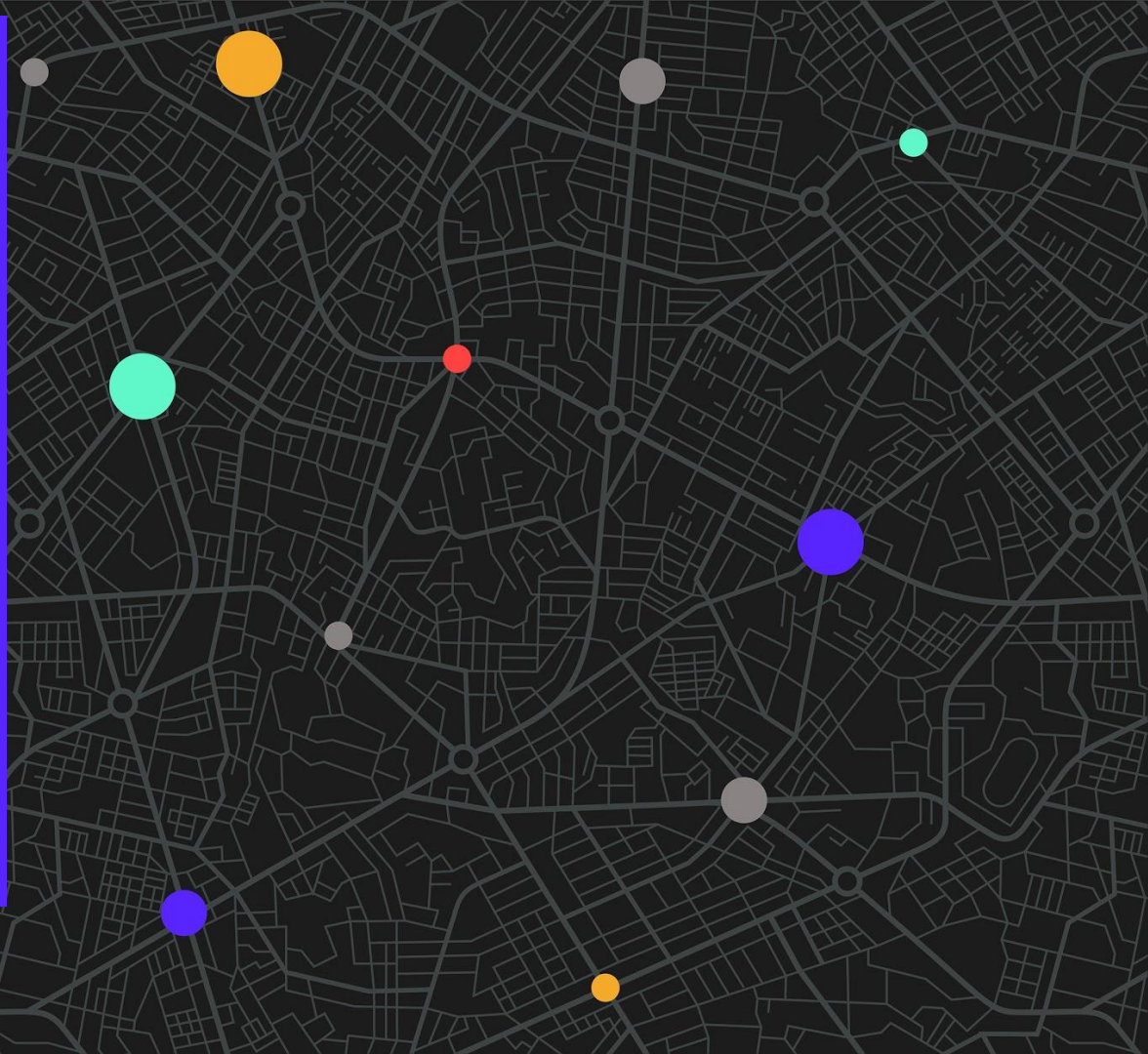




UNITED STATES LOCATION DATA ANALYSIS

Location Data Analysis

Movement data is a valuable source of truth especially in the DOOH space. Vistar has analysed reports from multiple leading research and location data companies to compile the following insights into consumer movement patterns.



Increase to:

BIG BOX RETAILERS | CONVENIENCE STORES | ROADWAYS & GAS STATIONS



Big box store visitation mirrors that of grocery stores.

Both NinthDecimal and Foursquare are reporting upticks in visitation to big box retailers over the past several weeks, but, mirroring grocery store movement data, has begun decreasing in recent days.



Convenience stores seem to have less foot traffic volatility.

Based on Foursquare reports, convenience store visitation is fairly steady across the board, with increased traffic (+6%) in New York City in particular.



Auto-based movement seems higher or stable.

GlobalWebIndex found that 73% of U.S. drivers are driving more or the same amount since the coronavirus outbreak, and multiple sources cite motor fuel consumption up (+8%) over four weeks prior.

Ambiguous:

GROCERY STORES

Grocery stores are more ambiguous. Some sources indicate an increase in foot traffic, while others show a decrease.

Foursquare reports a 34% increase in visitation to grocers from February 19th to March 20th. While acknowledging a sharp increase initially and then a dip in foot traffic, Foursquare reports again increased traffic.

NinthDecimal reports a decrease in foot traffic, but more granular metrics reveal similar trends. There was an increase in visitation to grocery stores shortly after the Italy lockdown (3/9 – 3/15) which is likely due to 'stocking up', but there has since been a decrease week over week (3/16 – 3/22) of 19%.

Decrease to:

AIRPORTS | ENTERTAINMENT | CASUAL DINING | QSR | MOVIE THEATERS | OFFICE BUILDINGS

- X — From February 19th (which is seen as marking the end of 'normal' movement generally) to March 20th, foot traffic to airports has decreased by 40% (Foursquare). Data from NinthDecimal breaks this down by week, with the greatest drops in visitation occurring between March 16th and March 22nd – a 49% decrease week over week.
- X — Non-essential, leisure entertainment-related movement is taking a big hit, with movie theaters experiencing an 86% decrease (3/16 – 3/22 based on the previous week, NinthDecimal).
- X — Similar to movie theater movement trends, foot traffic to malls and other shopping centers has decreased 75% week over week (3/16 – 3/22 based on the previous week, NinthDecimal).
- X — As restaurants shut down, foot traffic shows the impact, via NinthDecimal:
 - Casual dining restaurants have been hit hardest, with a 77% decrease in traffic week over week (3/16 – 3/22 based on the previous week) though, of course this does not take delivery volume into account.
 - Quick service restaurants are also seeing decreased foot traffic but less-so, with a 38% decrease week over week (3/16 – 3/22 based on the previous week).
- X — With business closures and restrictions on non-essential employee movement, foot traffic in office buildings has decreased (an 83% reduction from February weekly average, according to PlaceIQ data).

Reference Resources

- [DYNATA](#)
- [NINTHDECIMAL](#)
- [FOURSQUARE](#)
- [IRI](#)
- [CUEBIO](#)
- [OPENWEBINDEX](#)
- [PLACEIQ](#)

A Note From Vistar



At Vistar, our mission is twofold: to serve as a reliable and consistent business partner and help the out-of-home industry grow and thrive.

We remain both especially confident in our medium and grateful for our clients in this trying time. As the COVID-19 situation evolves rapidly, our teams are working hard to provide the most rigorous and reliable information on all things OOH. We are committed to help you navigate the current landscape as it continues to unfold. If you have any questions or concerns, please feel free to reach out to us.

Most importantly, stay healthy and know Vistar is thinking of you all.



VISTAR MEDIA

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