

VISTARMEDIA

Supporting Our Partners in the Wake of COVID-19

July 27, 2020



Navigating Through Unprecedented Change

We cannot deny that the OOH industry has been upended — “business as usual” simply won’t cut it.

Transitioning advertising budgets back into the OOH space requires a thoughtful approach, the use of data to back up decisions, and clear visibility into performance.

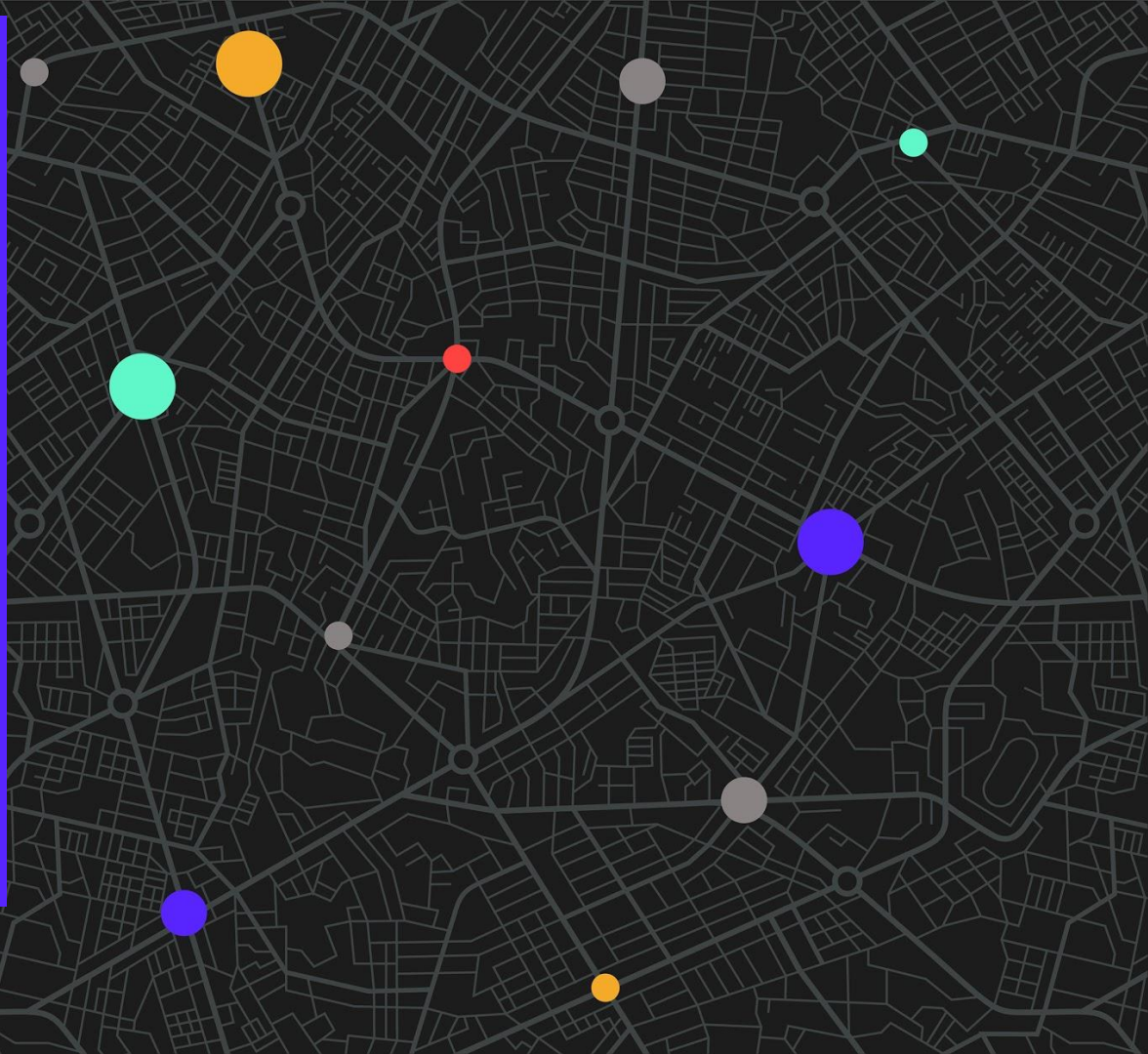
Over the past few months, Vistar has been analyzing consumer movement patterns and shifting behaviors to help our partners understand how to best utilize DOOH and ensure the right messages reach the right people at the right places and times.



LOCATION DATA ANALYSIS

Location Data Analysis

Movement data is a valuable source of truth especially in the DOOH space. Vistar looked at unique mobile devices surrounding DOOH venues available in the Vistar platform to understand volume change by market and venue type.



Coming Back from COVID-19

All analyses point to programmatic DOOH making a strong comeback. Overall, foot traffic* levels have continuously increased, and we've seen solid consecutive week-over-week growth across most provinces. Additionally, all DOOH venue types have seen week-over-week boosts, with the vast majority of Vistar's inventory becoming available again.

- **+12%** increase in overall traffic surround Vistar's DOOH inventory since the end of March
- **+84%** of Vistar's Canadian inventory is back online
- COMBB data shows Canadian travel behaviours at **-8%** below pre-pandemic norms

**Traffic = number of unique devices observed surrounding DOOH venues*



Better-than-Before Billboard Traffic

Vistar also analyzed foot traffic to a select list of billboard venues across Canada to understand how traffic changed from February to June. We found that traffic levels in nearly all provinces have surpassed the February visit rates, with the exception of Ontario and Alberta. Overall, traffic has increased more than 5%, compared to pre-COVID “normal” times.

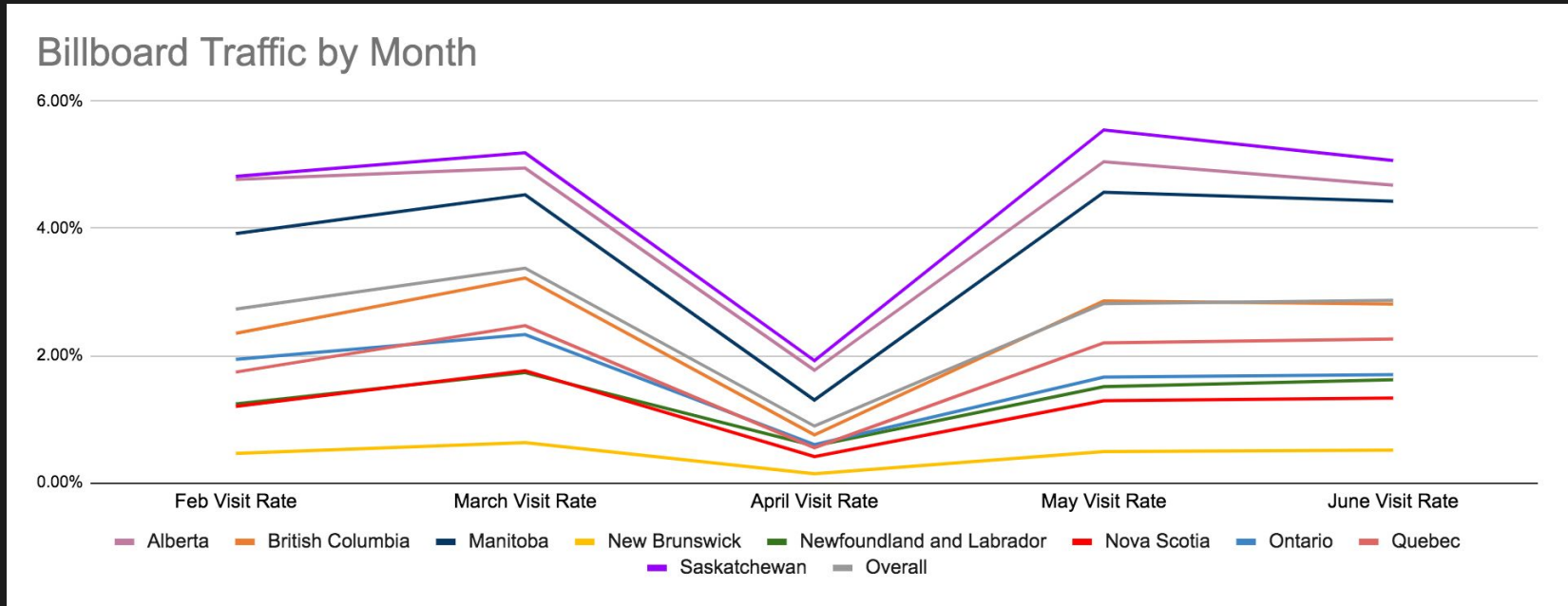
PROVINCE	% CHANGE SINCE FEB.
Alberta	-1.89%
British Columbia	19.57%
Manitoba	13.01%
New Brunswick	10.87%
Newfoundland/Labrador	30.65%
Nova Scotia	10.83%
Ontario	-12.37%
Quebec	29.89%
Saskatchewan	5.19%

+5%

overall increase in national traffic around billboards, compared to pre-COVID February

A Strong Return for OOH

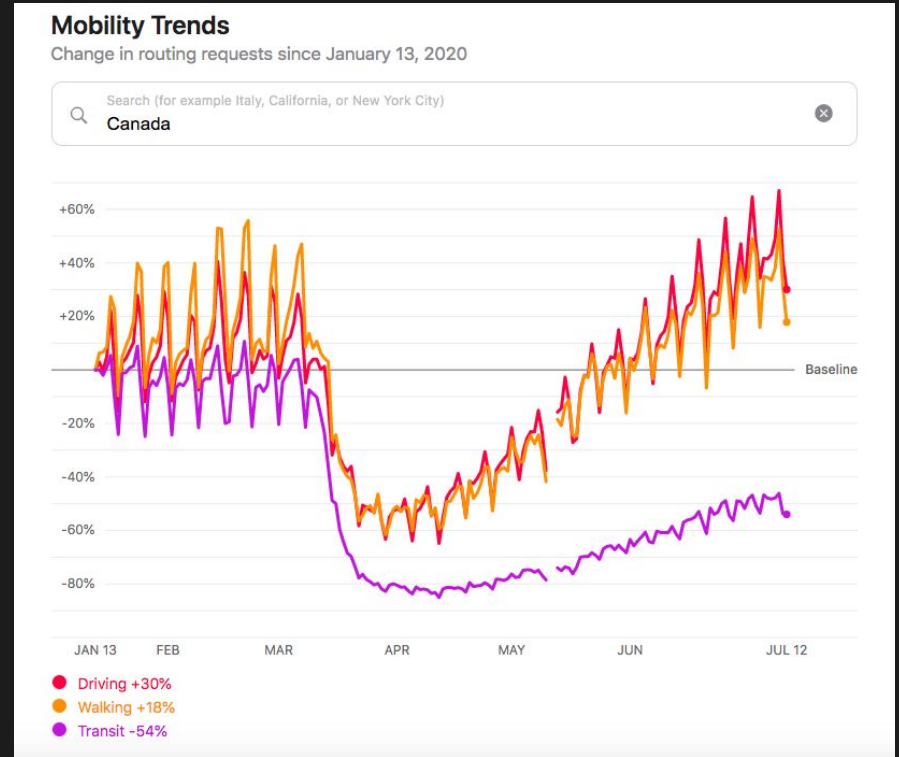
The chart below looks at monthly foot traffic – the number of devices seen near the billboards out of the total number of devices in the market – showing just how strong of a return OOH is making.



Walking & Driving Are Trending Up

Apple's Mobility Report also shows promising signs of movement throughout Canada. The report analyzes the change in requests for directions in Apple Maps. Looking at Canada overall, there has been a:

- **+30%** increase in driving direction requests
- **+18%** increase in walking requests
- **-54%** decrease in transit request



Available Venue Types by Province

Alberta	Bars, Casual Dining, Recreational Locations, Gyms, Salons, Offices, Billboards, Bus Shelters, Apartments, Malls, Airports, Subway
British Columbia	Bars, Casual Dining, Hotels, Recreational Locations, Sports Entertainment, Gyms, Salons, Offices, Billboards, Urban Panels, Apartment Buildings, Malls, Airports
Manitoba	Bars, Casual Dining, Recreational Locations, Gyms, Offices, Billboards, Malls
New Brunswick	Bars, Casual Dining, Recreational Locations, Sports Entertainment, Gyms, Office Buildings
Newfoundland and Labrador	Bars, Gyms, Offices, Billboards
Nova Scotia	Bars, Casual Dining, Recreational Locations, Gyms, Offices, Billboards, Malls
Ontario	Bars, Casual Dining, Recreational Locations, Sports Entertainment, Gyms, Offices, Billboards, Bus Shelters, Apartments, Convenience Stores, Malls, Subway
Prince Edward Island	Bars, Gyms, Offices
Quebec	Bars, Casual Dining, Recreational Locations, Gyms, Offices, Billboards, Bus Shelters, Urban Panels, Apartments, Malls, Subway
Saskatchewan	Bars, Casual Dining, Recreational Locations, Gyms, Offices, Billboards, Malls, Airports

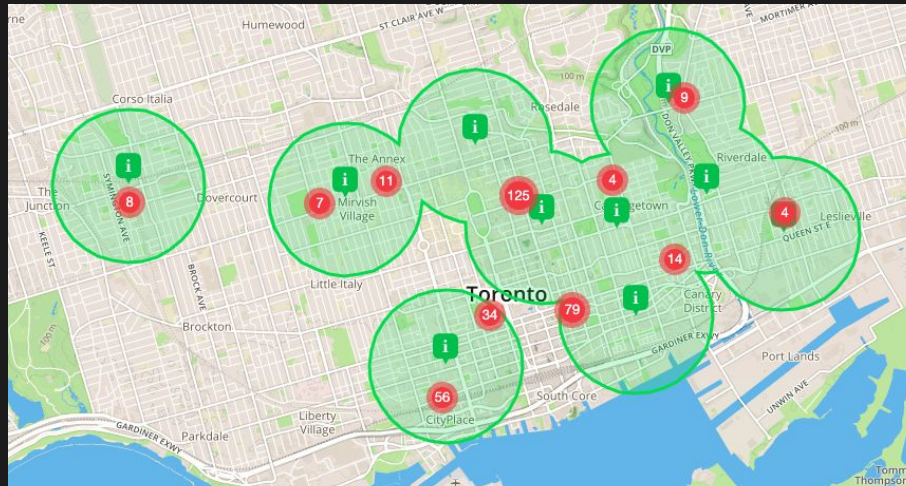
AUDIENCE & TARGETING RECOMMENDATIONS
FOR DIGITAL OUT-OF-HOME

Pedestrian Zones In Toronto

Toronto will close some curb lanes to make room for pedestrians & parking.

Toronto's pedestrian-only zones provide outdoor waiting areas for grocery & pharmacy stores, and for additional outside seating for dine-in restaurants. This creates new high-dwell locations to reach consumers through DOOH!

Vistar created [a plan](#) using a POI list of the 10 intersections in Toronto with lane closures for pedestrian zones. By using a 1km radius around these locations, there are almost 350 relevant DOOH screens you can activate.

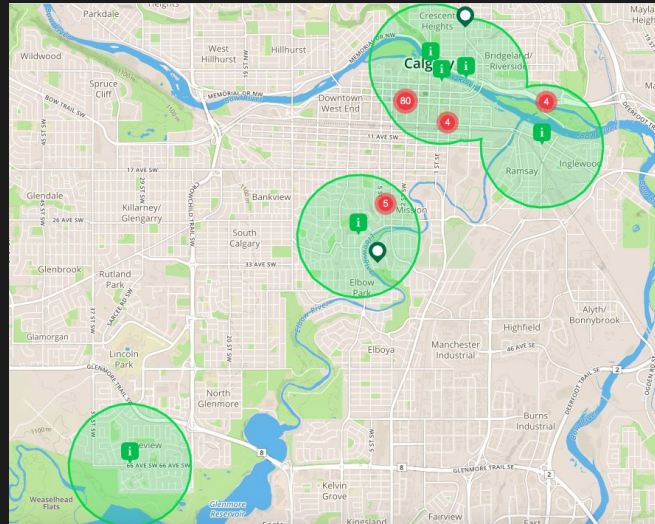


Pedestrian Zones In Calgary

Road closures planned for Calgary to give more room to pedestrians and cyclists.

Calgary also recently created new pedestrian-only zones, producing new high-dwell locations to reach consumers through DOOH!

Vistar created [a plan](#) using a POI list of temporary street closures, in effect between 7 PM Friday and 7 PM Sunday. By using a 1km radius around these hotspots, there are 90 screens and more than 2M impressions available over the next 30 days.

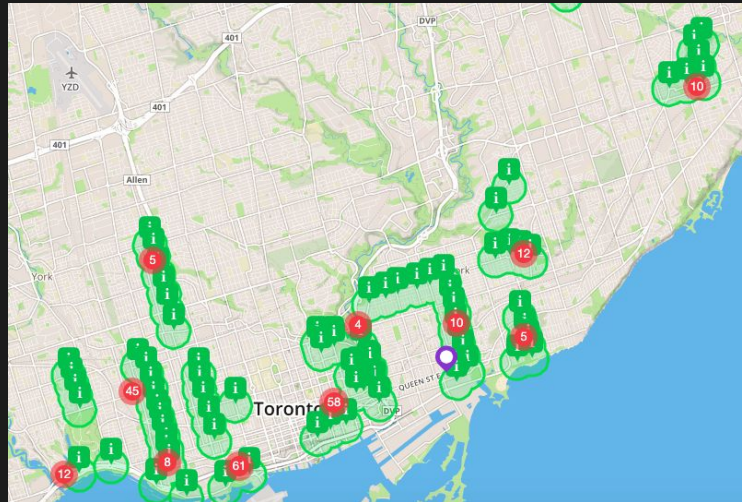


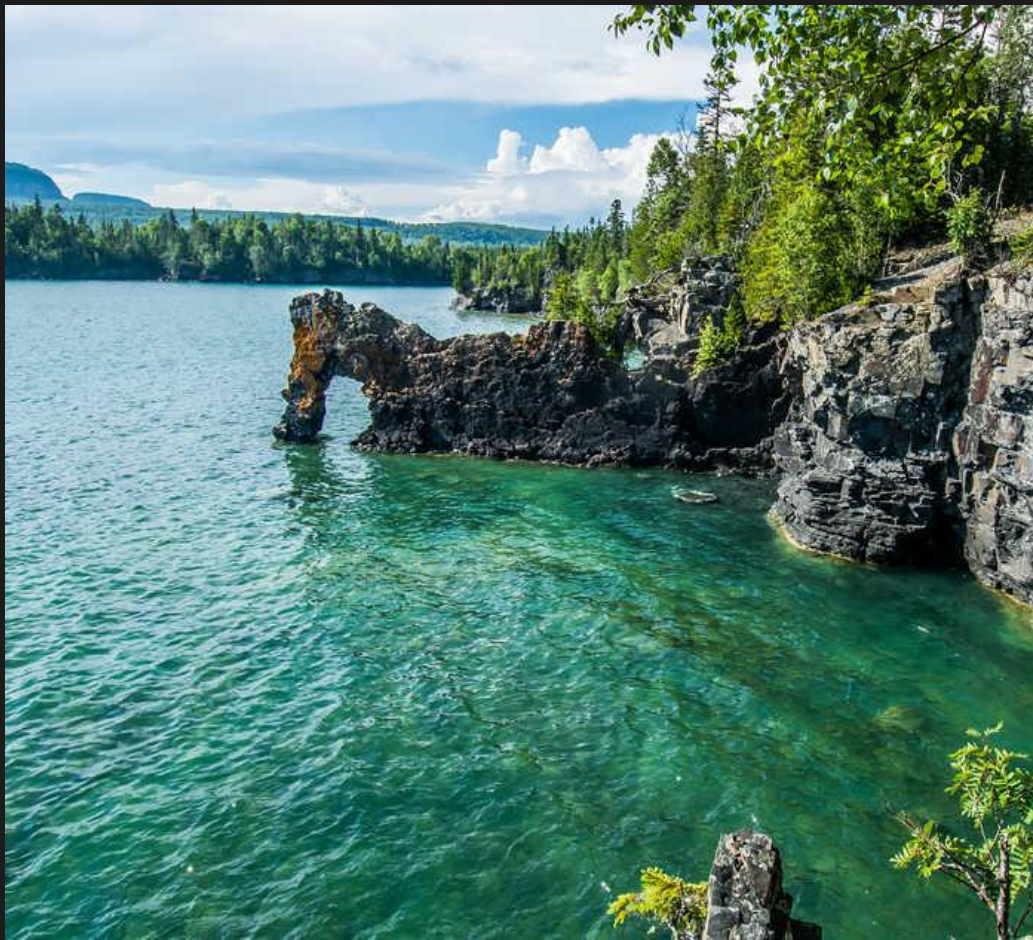
Weekend Pedestrian Streets

Toronto closing 57 km of streets to traffic for pedestrians and cycling.

To create ample space for pedestrians on weekends, Toronto has completely closed certain streets.

Vistar created [a plan](#) using a POI list of spots along the 57km of streets that are completely closed to traffic on weekends to allow pedestrian traffic. Using a radius of 0.5km and targeting Saturdays and Sundays, this plan delivers more than 240 screens — with the expectation that this number will go up as more venues open up.





Ontario Provincial Parks

Reach visitors traveling to Ontario's provincial parks this summer with DOOH! Vistar has 73 screens and more than 8M impressions [available](#) within a 5km radius around these parks through the end of September.

Inventory includes:

- Entertainment
- Health & Beauty
- Office Buildings
- Residential
- Retail



Alberta Provincial Parks

Reach visitors traveling to Alberta's provincial parks this summer with DOOH! Vistar has 62 screens and more than 61M impressions [available](#) within a 5km radius around these parks through the end of September.

Inventory includes:

- Entertainment
- Health & Beauty
- Office Buildings
- Outdoor
- Retail
- Transit



Reaching Roadtrippers

With caution about flying high, many would-be travelers are taking to the road this summer!

With a POI targeting strategy, you can reach drivers as they travel on 400 Highway North to Canada's cottage country.

[This plan](#) uses a 3km radius and targets billboards to ensure consumers are being reached along their routes this summer.



Reaching Roadtrippers

With caution about flying high, many would-be travelers are taking to the road this summer to Niagara Falls.

With a POI targeting strategy, you can reach drivers as they travel along the 403 and QEW highways to get there.

[This plan](#) uses a 2km radius and targets billboards to ensure consumers are being reached along their routes this summer.

FAQs



Conditions are likely to keep changing, sometimes rapidly. If behaviours are constantly shifting, how should this impact my out-of-home strategy?

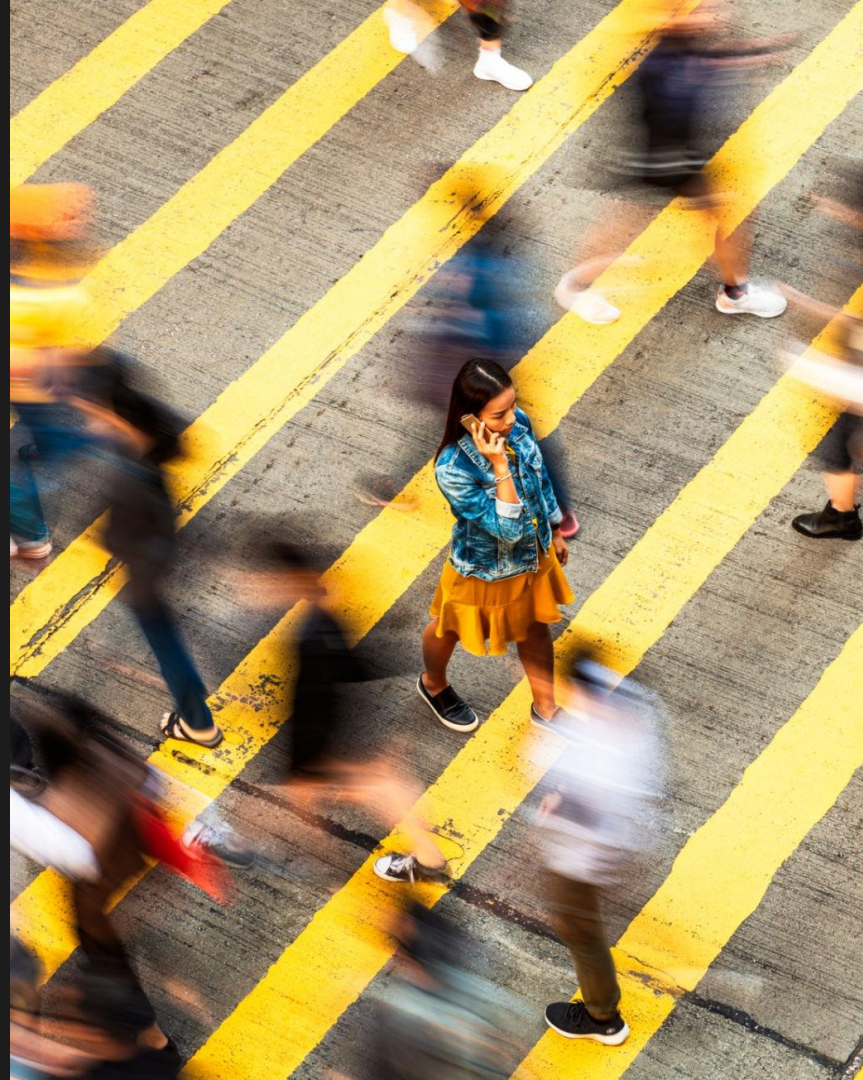
One of the biggest benefits of activating out-of-home programmatically is flexibility. With Vistar, you can easily adapt a strategy, whether that means shifting budget to locations that are less impacted, removing venue types that have restrictions placed on them, or choosing to pause/postpone a campaign. 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 behaviour, 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 venues, impressions and CPMs being impacted by changes in consumer behaviour?

The impression data in the Vistar platform comes directly from our media owner partners, and relies on data from credible industry auditing groups. These groups analyze 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.



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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