

VISTARMEDIA

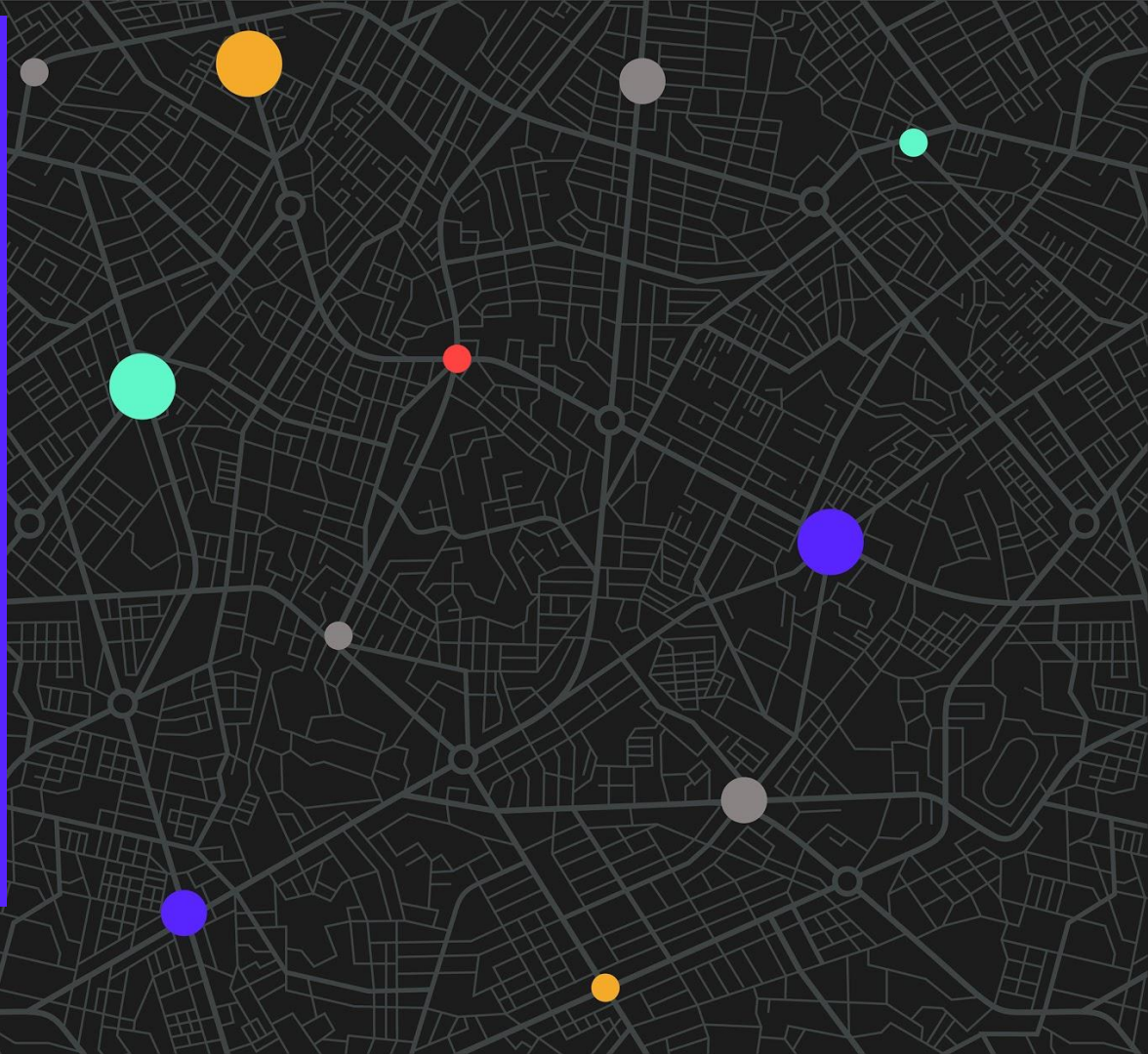
Supporting Our Partners
in the Wake of COVID-19



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.



Overall, traffic in Canada is down.

-91%

Overall decline in traffic in Canada between March 2nd - April 17th 2020.
Since the beginning of April, this decline has started to flatten.

Trends to Date

All DMAs have seen stable traffic levels since the 2nd week of April, and more than half of provinces (6 out of 11) have seen increases in traffic from last week. There has been an increase in traffic in Alberta, British Columbia, Manitoba, New Brunswick and Saskatchewan since last week. The chart below shows traffic patterns for all provinces over the past 2+ months.

Market ^	3/15/20	3/22/20	3/29/20	4/5/20	4/12/20	4/19/20	% Change sin...
1. Alberta	-13%	-50%	-71%	-31%	-17%	1%	-93%
2. British Columbia	-12%	-47%	-73%	-25%	-7%	4%	-91%
3. Manitoba	-12%	-43%	-76%	-41%	-14%	14%	-93%
4. New Brunswick	-11%	-34%	-64%	-33%	0%	19%	-83%
5. Newfoundland a...	8%	-35%	-80%	-18%	3%	-4%	-89%
6. Northwest Territ...	-28%	-49%	-42%	-33%	33%	-17%	-84%
7. Nova Scotia	-11%	-45%	-73%	-16%	-29%	-2%	-92%
8. Ontario	-14%	-44%	-62%	-22%	-24%	-3%	-89%
9. Prince Edward I...	-13%	-55%	-68%	3%	-37%	65%	-87%
10. Quebec	-11%	-52%	-67%	-35%	-25%	-1%	-93%
11. Saskatchewan	-5%	-38%	-78%	-42%	-2%	3%	-92%

*Low scale of data for Northwest Territories and Prince Edward Island. Far right column refers to % change in traffic from week 1 to week 7.

Impacted Venue Types

Overall traffic has declined since the beginning of March. The impact on different venue types, however, has varied greatly.

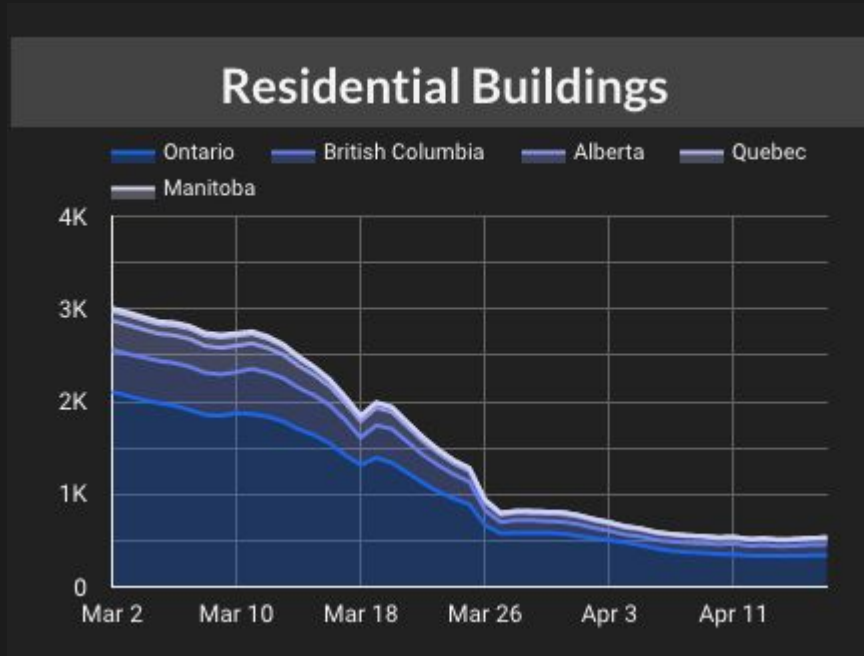
GREATEST DECLINE IN TRAFFIC:

Sports Entertainment
Office Buildings
Transit
Malls

LEAST DECLINE IN TRAFFIC:

Residential Buildings
Convenience Stores

Traffic to Residential Buildings by Province



Among the venue types analyzed, residential buildings have seen the smallest decline in traffic since the beginning of the pandemic, which makes sense as people have been instructed to stay home.

More Venues Stable or Increasing

Some venue types are seeing an increase in traffic compared to last week. This could indicate that the worst declines in traffic are over and that consumers are starting to leave their homes again.

INCREASED TRAFFIC SINCE LAST WEEK:

- Malls
- Office Buildings
- Transit
- Billboards

STABLE TRAFFIC SINCE LAST WEEK:

- Residential Buildings
- Convenience Stores

More Venues Stable or Increasing

Some venue types are seeing an increase in traffic compared to last week. This could indicate that the worst declines in traffic are over and that consumers are starting to leave their homes again.

Province	Stable since last week	Increased since last week
Alberta	Transit, Billboards, Residential Buildings	Office Buildings, Malls
British Columbia	Transit	Billboards, Malls, Office Buildings, Residential Buildings
Manitoba		Malls, Billboards
New Brunswick		Billboards
Nova Scotia	Billboards	
Ontario	Billboards, Malls, Residential Buildings, Convenience Stores, Transit	Office Buildings, Doctors Offices
Quebec	Billboards, Office Buildings, Transit, Residential Buildings	
Saskatchewan	Malls	Billboards

ADDITIONAL RECOMMENDATIONS

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

We understand. “Shelter in place” 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 behaviors. We are actively analyzing 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.

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 DMAs 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.

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.



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.



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.



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