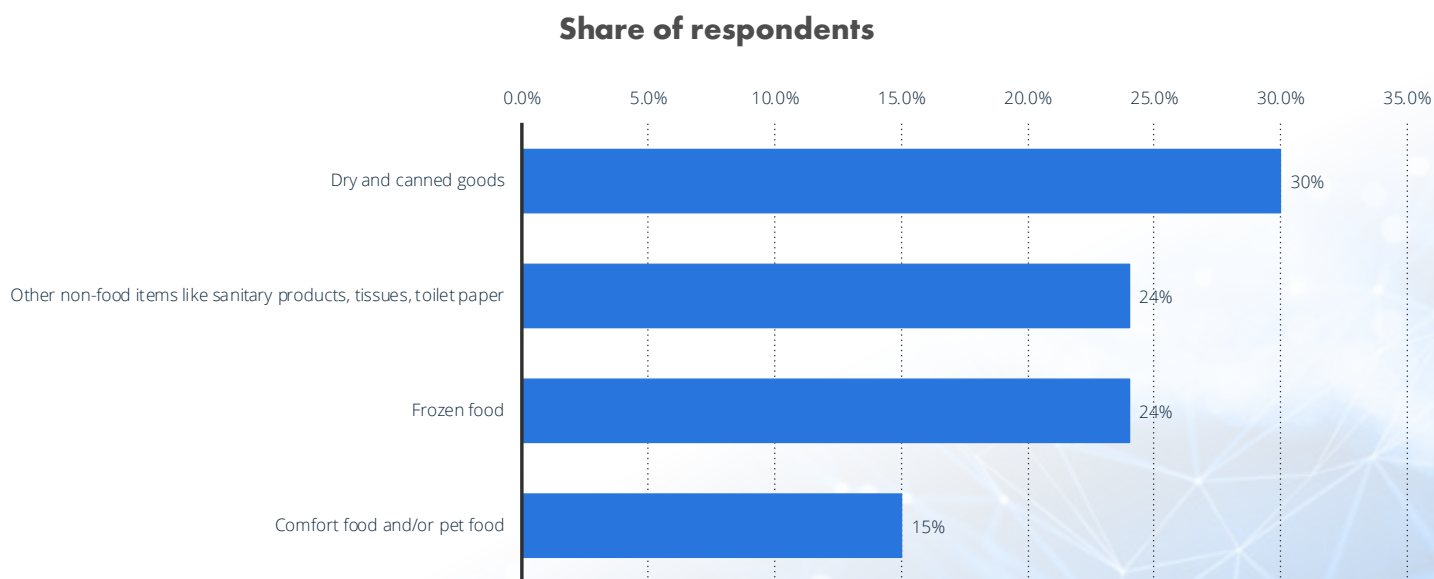


WHAT ARE CANADIANS BUYING?

Canadians felt the need to stock up, despite most having provisions at the start of the outbreak. According to a study done by Dalhousie University, 63% of Canadians said they already had provisions at home, while 41% had purchased provisions during the outbreak. The most popular products among those who have shopped have proven to be dry and canned foods (30%), and non-food items including sanitary products, tissues and toilet paper (24%) [Source: Dalhousie University].

Leading provisions purchased due to the coronavirus outbreak in Canada as of March 2020
Main grocery supplies purchased by Canadians due coronavirus 2020

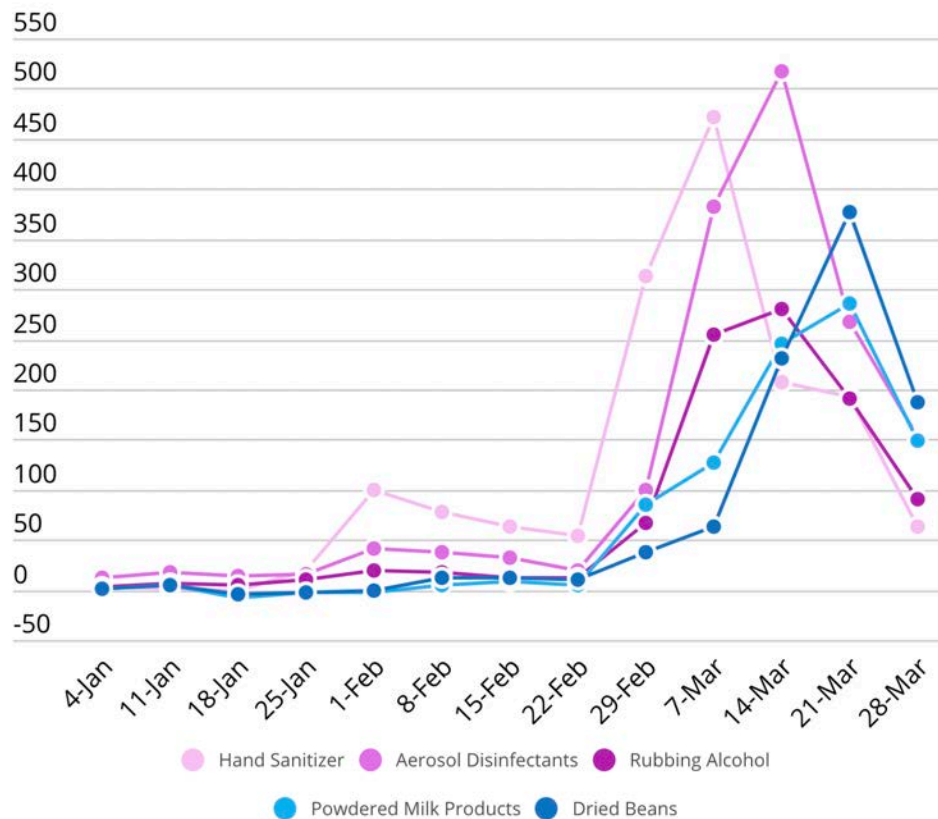


Note: Canada; March 13 to 15, 2020; 1,014*

WHAT ARE CANADIANS BUYING?

These trends are similar to what has been seen in the US. With Nielsen reporting massive growth in sales of products within these categories compared to the same time period in 2019. In the week of March 14th, 2020, hand sanitizer saw a 200% growth in sales compared to 2019. Powdered milk products were up 250% and aerosol disinfectants, over 500% [Source: Nielsen].

% sales growth vs year ago (US Dollars)



Source: Nielsen Retail Measurement Services, Total U.S. All Outlets Combined, 1 week periods starting 12/29/2019 vs. year-ago

Where Canadians are currently Shopping

Returning to the Dalhousie study, only 3% of Canadians have turned to online ordering as a result of their concerns, at the time of this study.

The majority of Canadians are still making trips to physical grocery stores, with 71% having done so in the last week of March, according to a study done by Leger. Trips to pharmacies, convenience stores, and liquor stores are also still occurring, as these businesses remain open [Source:Leger].



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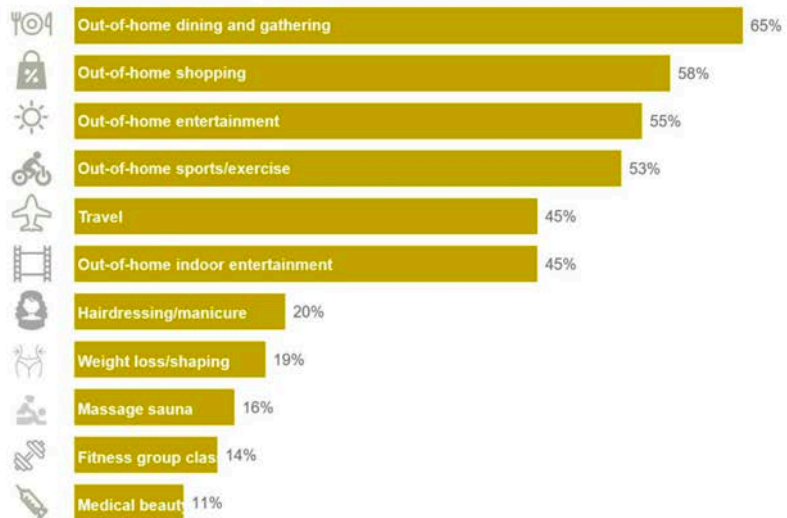
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POST-COVID ANTICIPATED CONSUMER BEHAVIOURS

A robust rebound in shopping behaviour and purchases is expected to occur in a post-pandemic culture.

For example, Chinese consumers who were the first citizens to be ordered to stay-at-home say according to studies that they are looking forward to spending money on out-of-home activities. The most popular choice is dining, with 65% looking forward to out-of-home dining and gathering. Other popular activities include: out-of-home shopping (58%), out-of-home entertainment (55%), out-of-home sports/exercise (53%), travel (45%), and out-of-home indoor entertainment – i.e. movie theatres (45%) [Source: Kantar].

But everyone is looking forward to 'returning' to the new normal



KANTAR

China gives us further insight into the pent-up demand for outside activities that we could expect in Canada as evidenced by what occurred in China during a recent holiday weekend (April 3-5):

"Meanwhile in Shanghai, the famous Bund waterfront was once again packed with shoppers and tourists, after weeks of being near deserted. Many of the city's restaurants that were shuttered only days ago also appeared to be doing a brisk trade, with several requiring reservations to enter."

[Source]: CNN.com; April 6, 2020 [Source]: CNN.com; April 6, 2020



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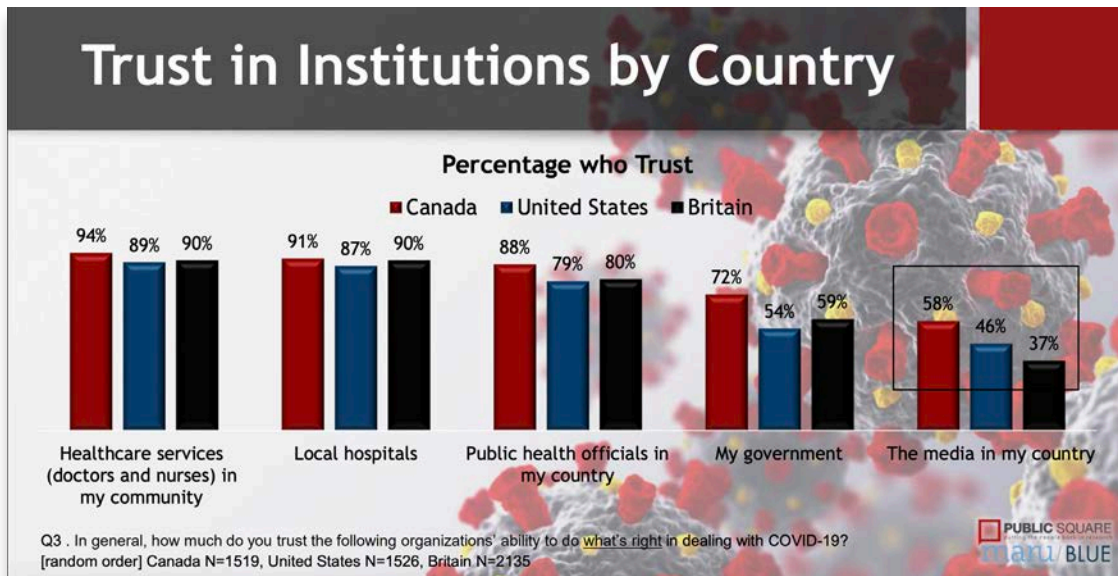
PLACE BASED

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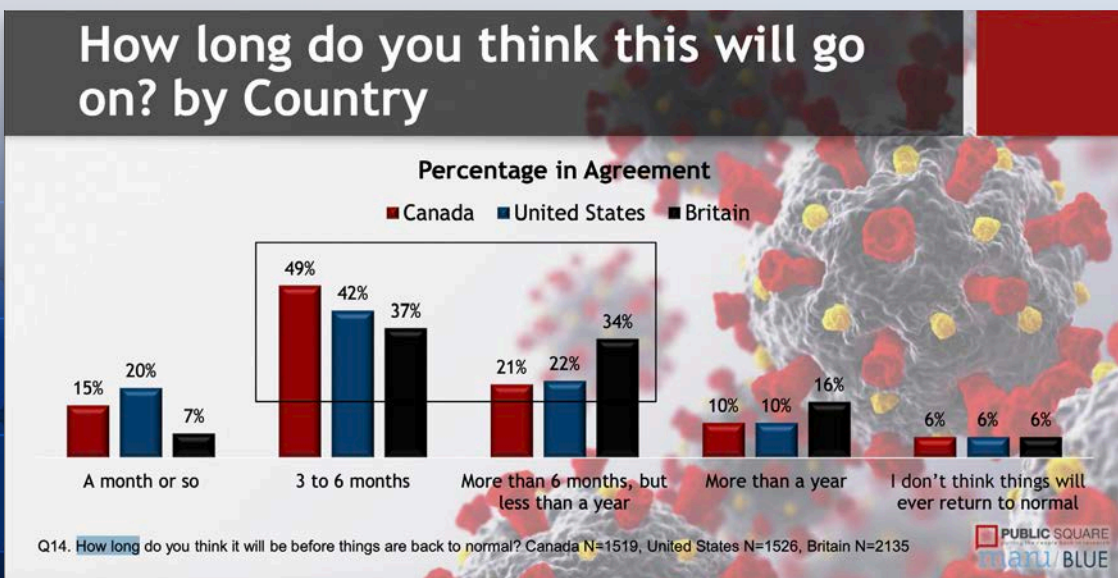
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CANADIANS ATTITUDES & PERCEPTIONS

Canada is currently near or at the peak of the pandemic. Governments continue to add or expand restrictions such as closing parking lots at public parks and implementing fines for those violating social distancing and so it is natural that Canadians are eager to return to normalcy. But Canadians overwhelmingly agree with these measures as demonstrated by the high levels of trust in public institutions such as governments [Source:Public Square].



Canadians' high trust in their public institutions may be why they lead the US and UK in optimism in believing things will be back to normal in 3-6 months [Source:Public Square]. And as a result, we can expect a strong rebound in outdoor activities and events, as well as footfall to other businesses, such as salons and restaurants.



OOH CONTINUES TO REACH CANADIANS

Since mid-March, we have experienced unprecedented disruption to daily life in Canada as provincial governments enacted Stay-at-Home orders for non-essential businesses and services. As a result, vehicular traffic on our roads have decreased to varying degrees and as an Out-of-Home advertising company, we are assessing, city by city, billboard by billboard, the weekly changes to traffic flow. Our early analysis indicates there are locations that have seen a significant decrease while a number of others have to a lesser extent, especially those that are in close proximity to essential service retailers such as grocery stores, pharmacies, gas stations and quick service restaurants.

We are committed to our tradition of transparency and therefore we will share our traffic pattern findings in the coming weeks as more data is analyzed. We thank you for your patience as we undertake this significant analysis.

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**BRANDS AND
BUSINESSES**
HARNESS THE **POWER** OF
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OOH ADVERTISING OPPORTUNITIES FOR BRANDS AND BUSINESS

Since mid-March of this year, Canadians have experienced unprecedented disruption to daily life caused by the global COVID-19 pandemic especially as our federal and provincial governments rapidly enacted emergency measures to keep the public safe while working to slow the virus's spread. When Stay-at-Home (SAH) orders for non-essential businesses and services went into effect, vehicular traffic on roadways dropped accordingly. As an Out-of-Home advertising company we know that it is the public's daily exposure to our displays that has made our medium a go-to communication platform for brands and businesses. Therefore, by utilizing mobile/GPS data from Pelmorex, our location data provider, we are assessing, city by city, billboard by billboard, the weekly changes to traffic flow pre-COVID and during this SAH time.

WHAT WE KNOW TODAY

Traffic on roadways has decreased but has not disappeared. OOH's strength has always been the fact that our advertising displays are within close proximity of where consumers work, shop and frequent for leisure and entertainment. Of these consumer touchpoints, shopping trips - specifically to grocery stores, pharmacies and liquor outlets - are still occurring during the SAH period. According to Leger, 71% of Canadians made a trip to a grocery store the w/o March 29.

The movement of the population, while reduced from pre-COVID, aligns with our early traffic analysis of OOH displays located near these essential service retailers. In fact, weekly traffic during March was more affected on high-volume commuter highways vs the traffic passing our OOH displays located within a 1-2KM radius of essential retail.

Therefore, there is opportunity for advertisers to reach Canadians when they are outside of their home during SAH and with messages on OOH displays that acknowledges the public and unifies the brand with the greater cause.



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