

LOCATION DATA TRAFFIC ANALYSIS

Since mid-March Canadians have experienced unprecedented disruption to their daily lives, as governments enacted Stay-at-Home orders for non-essential businesses and services in response to the COVID-19 pandemic. As a result, vehicular traffic on roads and highways across the country have understandably decreased. With Out-of-Home advertising reliant on the activity of Canadians as they move about their communities to work, shop and participate in leisure activities, any significant changes to these daily routines will in turn impact traffic around Out-of-Home locations. We set out to understand the impact of any traffic declines on PATTISON's national inventory (200+ markets) of static and digital outdoor displays and to share those findings with our clients.

Through our partnership with Pelmorex Data Solutions and their proprietary mobile/GPS location data, we have gathered the weekly traffic passing by our 24,000 geo-fenced displays, market by market, frame by frame and are assessing the weekly changes that are occurring to traffic flow from January 1 to today as well as going forward.

Here are our topline observations:

1 Traffic declines vary location by location

It appears that the area an OOH display is surrounded by can influence traffic flow from pre-COVID to today. Displays that are typically high-volume commuter routes saw steeper declines than displays that are within close proximity to the essentials service retailers such as grocery stores, QSRs and pharmacies.

For example, a Digital Superboard on Toronto's Gardiner Expressway has experienced a 60% decrease in traffic from the baseline of January 1-March 15 compared to w/o April 5. A 10x20 billboard a few kilometers north of the Gardiner and that is a short distance to a major grocery store brand has decreased by 46%

It's worth noting that in either case, both OOH displays still deliver considerable reach of the population as traffic flow has decreased not disappeared.



CLASSIC



DIGITAL



TRANSIT



PLACE BASED

pattisonoutdoor.com

PATTISON

2 Provincial emergency measures influence a market's overall average decrease

No two provinces or cities have identical emergency acts and therefore, the types of businesses deemed essential vs non-essential also vary city to city. We observe that our displays in Montreal which arguably has some of the strictest SAH measures in place have seen decreases in traffic volume of 52% on average while for the same time period, Vancouver decreased by 42%.

3 Smaller cities and rural markets traffic decreases are lower than expected

The St. Catharines-Niagara region is an example where less than 10% of the inventory (70 displays out of 807) saw decreases of more than 60%. A few 10x20 billboards have even seen an increase in traffic versus the pre-COVID baseline. Further investigation revealed their nearness to retail clusters of grocery stores, pharmacies and QSRs.

These three points reflect our topline, early observations of the massive amount of mobile/GPS data we are analyzing on a daily basis in order to provide transparent and actionable insights for our clients.

We believe that for the brands and businesses who are able to advertise during this time and wish to communicate messages of support and unity to local communities, OOH displays still provide **reach of the population** and more than ever, **contextual relevance** given their proximity to essential retailers and services.

We will continue to issue updates and can provide clients with a more comprehensive report upon request of their PATTISON Outdoor Account Executive.



CLASSIC



DIGITAL



TRANSIT



PLACE BASED

pattisonoutdoor.com

PATTISON

Methodology

- Date Coverage: January 1st, 2020 to April 5th, 2020
- Market Coverage: BC Interior, Vancouver, Calgary, Edmonton, Saskatchewan, Winnipeg, Toronto, Southwestern Ontario, Ottawa, Montréal and Halifax
- 10,000 Individual Locations
- Average location baseline between January 1st to March 15th 2020 was used as the baseline to determine the percentage change

Reporting

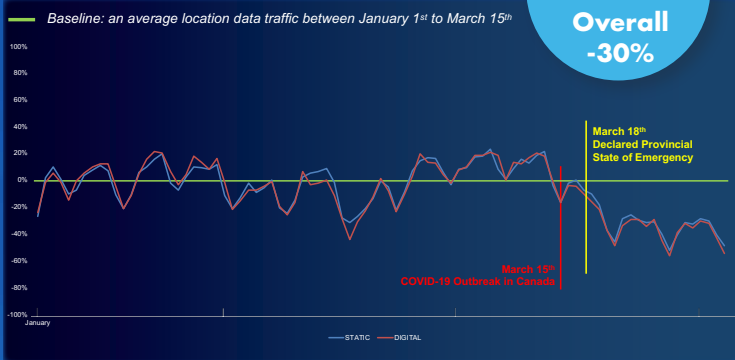
- An average traffic drop by each market since March 15th, 2020:

BC Interior	-30%
Vancouver	-42%
Calgary	-49%
Edmonton	-46%
Saskatchewan	-42%
Winnipeg	-41%
Toronto	-49%
Southwestern Ontario	-43%
Ottawa	-53%
Montréal	-52%
Halifax	-48%

BC INTERIOR

Average
% drop after
March 15th

Overall
-30%



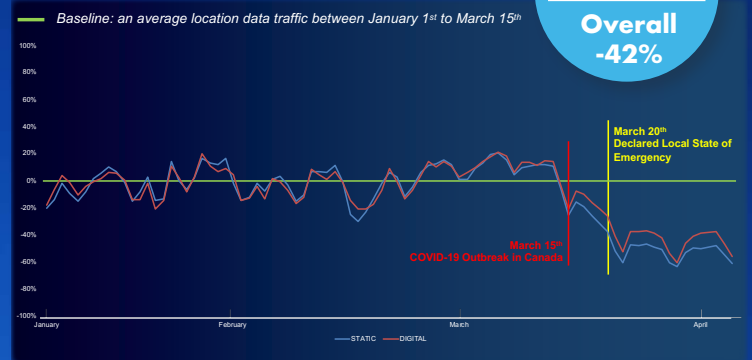
*The information presented here is anonymous, aggregated, and permission based GPS location data. At this time, the data is intended to be used for anecdotal purposes only. Readers are to be aware that this data only looks at those who have travelled during the months of January 1st to April 5th, 2020.

Pelmorex Location Insights, data taken from January 1st to April 5th, 2020.

VANCOUVER

Average
% drop after
March 15th

Overall
-42%



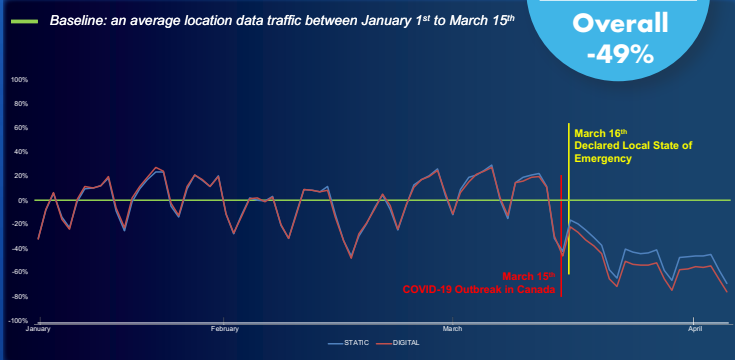
*The information presented here is anonymous, aggregated, and permission based GPS location data. At this time, the data is intended to be used for anecdotal purposes only. Readers are to be aware that this data only looks at those who have travelled during the months of January 1st to April 5th, 2020.

Pelmorex Location Insights, data taken from January 1st to April 5th, 2020.

CALGARY

Average
% drop after
March 15th

Overall
-49%



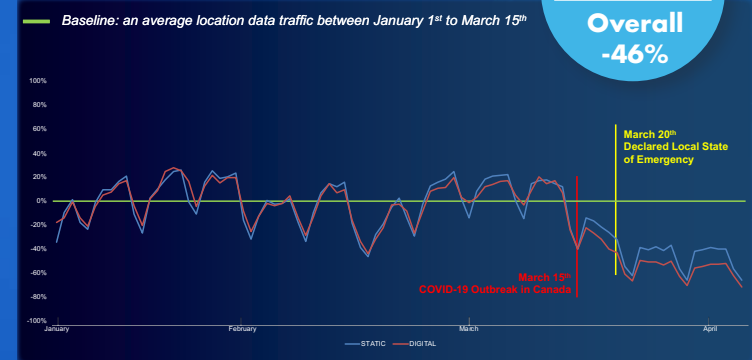
*The information presented here is anonymous, aggregated, and permission based GPS location data. At this time, the data is intended to be used for anecdotal purposes only. Readers are to be aware that this data only looks at those who have travelled during the months of January 1st to April 5th, 2020.

Pelmorex Location Insights, data taken from January 1st to April 5th, 2020.

EDMONTON

Average
% drop after
March 15th

Overall
-46%



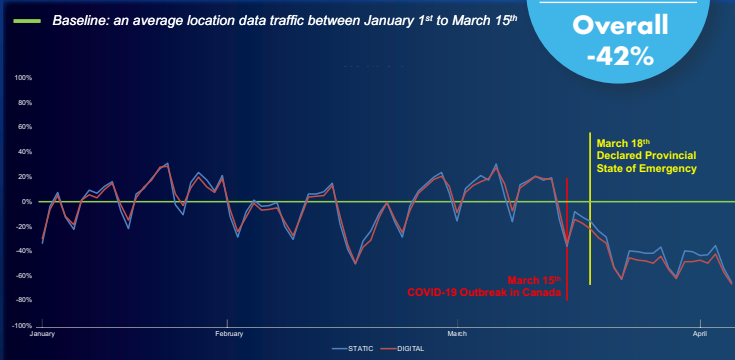
*The information presented here is anonymous, aggregated, and permission based GPS location data. At this time, the data is intended to be used for anecdotal purposes only. Readers are to be aware that this data only looks at those who have travelled during the months of January 1st to April 5th, 2020.

Pelmorex Location Insights, data taken from January 1st to April 5th, 2020.

SASKATCHEWAN

Average
% drop after
March 15th

Overall
-42%



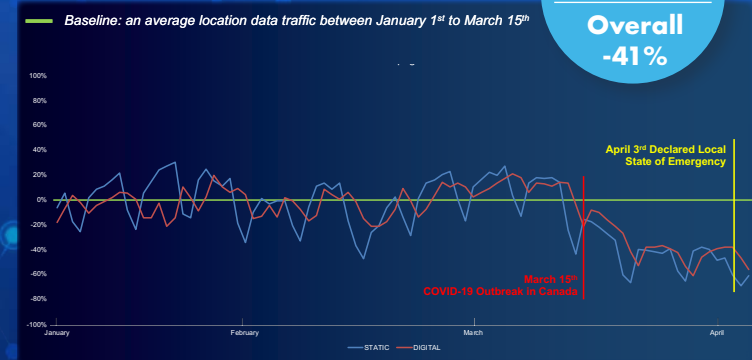
*The information presented here is anonymous, aggregated, and permission based GPS location data. At this time, the data is intended to be used for anecdotal purposes only. Readers are to be aware that this data only looks at those who have travelled during the months of January 1st to April 5th, 2020.

Pelmorex Location Insights, data taken from January 1st to April 5th, 2020.

WINNIPEG

Average
% drop after
March 15th

Overall
-41%



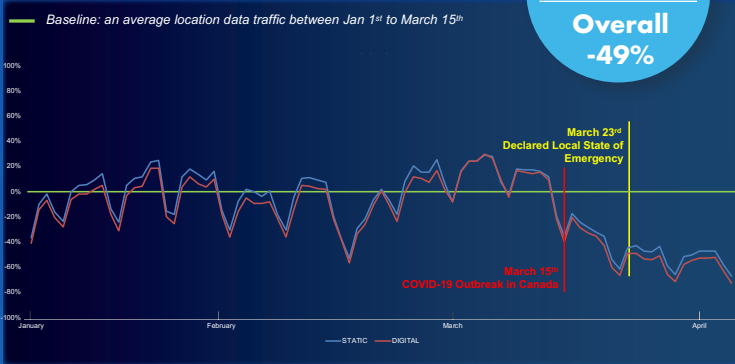
*The information presented here is anonymous, aggregated, and permission based GPS location data. At this time, the data is intended to be used for anecdotal purposes only. Readers are to be aware that this data only looks at those who have travelled during the months of January 1st to April 5th, 2020.

Pelmorex Location Insights, data taken from January 1st to April 5th, 2020.

TORONTO

Average
% drop after
March 15th

Overall
-49%



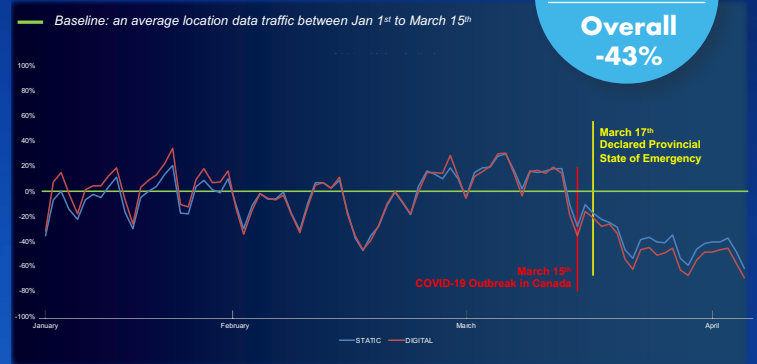
*The information presented here is anonymous, aggregated, and permission based GPS location data. At this time, the data is intended to be used for anecdotal purposes only. Readers are to be aware that this data only looks at those who have travelled during the months of January 1st to April 5th, 2020.

Pelmorex Location Insights, data taken from January 1st to April 5th, 2020.

SOUTHWESTERN ONTARIO

Average
% drop after
March 15th

Overall
-43%



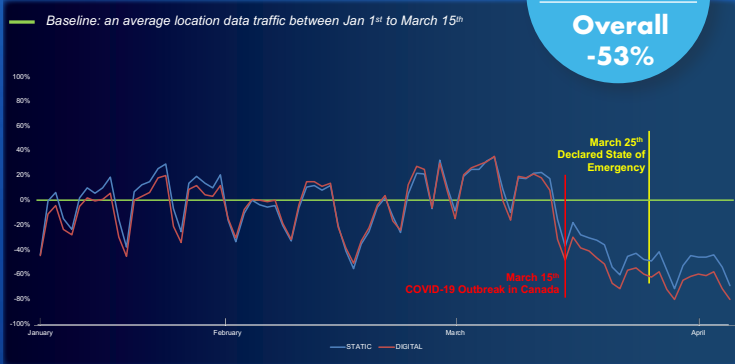
*The information presented here is anonymous, aggregated, and permission based GPS location data. At this time, the data is intended to be used for anecdotal purposes only. Readers are to be aware that this data only looks at those who have travelled during the months of January 1st to April 5th, 2020.

Pelmorex Location Insights, data taken from January 1st to April 5th, 2020.

OTTAWA

Average
% drop after
March 15th

Overall
-53%



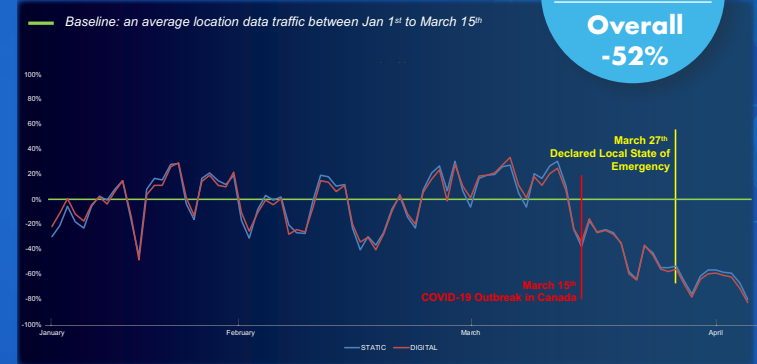
*The information presented here is anonymous, aggregated, and permission based GPS location data. At this time, the data is intended to be used for anecdotal purposes only. Readers are to be aware that this data only looks at those who have travelled during the months of January 1st to April 5th, 2020.

Pelmorex Location Insights, data taken from January 1st to April 5th, 2020.

MONTRÉAL

Average
% drop after
March 15th

Overall
-52%



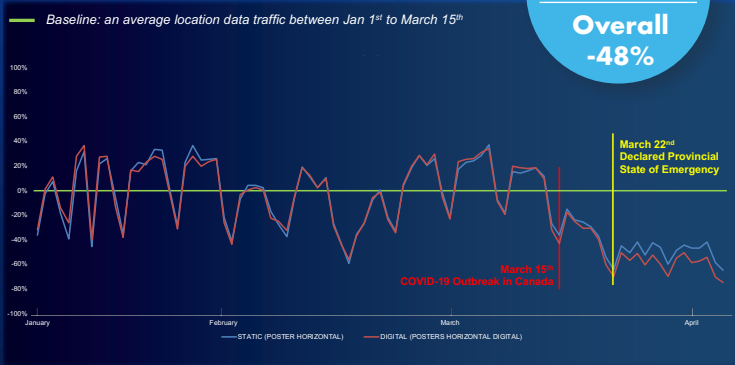
*The information presented here is anonymous, aggregated, and permission based GPS location data. At this time, the data is intended to be used for anecdotal purposes only. Readers are to be aware that this data only looks at those who have travelled during the months of January 1st to April 5th, 2020.

Pelmorex Location Insights, data taken from January 1st to April 5th, 2020.

HALIFAX

Average
% drop after
March 15th

Overall
-48%



*The information presented here is anonymous, aggregated, and permission based GPS location data. At this time, the data is intended to be used for anecdotal purposes only. Readers are to be aware that this data only looks at those who have travelled during the months of January 1st to April 5th, 2020.

Pelmorex Location Insights, data taken from January 1st to April 5th, 2020.



pattisonoutdoor.com

PATTISON