



**Population Movement in Canada**  
October 2020 to December 2020

**OUT &  
ABOUT**

**PATTISON**

# Contents

- Learned Insights slide 3
- Thoughts on OOH Planning for 2021 slides 4 – 6
- Population Movement Activity slides 7 – 20
- Implications of 8pm Closures and Curfews slides 21 – 22
- Impact of Provincial Measures on TTC Ridership slides 23 – 25

# Learned Insights

The focus of this presentation is on Daily Population Movement trends, Fall 2020 compared to Fall 2019:

- Total Canada Daily Population Movement (Traffic) has been consistent across the months, despite the various provincial lockdowns / code reds / stage 3s / curfews :
  - Avg Canada Total Daily movement trends have been in the 81-85% of same movement year ago; while the 9 to 5 daily movement has been in the range of 74-80% compared to year ago.
  - BC Interior and Halifax have demonstrated the highest daily movement activity throughout 2020.
  - Regina, Saskatoon and Winnipeg have seen the largest fluctuations in daily movement over the Fall period.
  - The spike in movement during week 51 demonstrates that we all require “in-person” contact; family and holidays are important to each of us.
- Current movement looks nothing like it did last Spring. Many current media stories comment on the high volume of traffic, crowded buses, using mobility data to highlight that we are all out and about. COVID fatigue? Possibly.
- Reduced business hours and curfews -- after 8pm – mean minimal impact on overall circulations:
  - On average, only 10% of daily market mobility occurs between 8pm and 5am as reported in this Fall/Winter data.
- Transit ridership is well below its pre-COVID levels, but is much greater than it was during last April/May 2020
  - Total TTC average weekday ridership has fluctuated between 1 million and 1.3 million from August through the first week of January.
  - TTC Subway weekday ridership is currently in the 325,000 to 390,000 range, currently averaging between 30-35% of normal weekday ridership. This daily volume of people remains a large audience to target.



# Thoughts on OOH Planning for 2021

- You can have confidence in planning OOH
  - We have the research, mapping and marketing tools to support you through the planning and buying processes.
  - PATTISION will continue to support you by providing the transparent formation you need through our audience tracking, population movement trends and circulation updates.
- There are sizable audiences in OOH right now, and they continue to increase
  - There are clear rewards for brands that reinvest in this recovering market: increased share of voice, and significant gains in media value, are the likely outcomes for those who re-engage early while other brands contemplate their next move.
- People are out and about, everyday
  - The traffic patterns over the recent holidays highlight an indisputable fact – we are social creatures who need to see one another, and we will travel to do so.
- First we “baked bread”, now we have “baked flexibility into our daily routines”
  - We have become more creative and flexible with our time in order to get everything done.
  - We still require a work / family / personal life balance.
  - On-demand and always available services is turning us into a 24-hour culture.
  - As a result of this flexibility, you may need to increase your touchpoints with consumers in new and varying ways – OOH can deliver on many of these opportunities.

# Thoughts on OOH Planning for 2021 (cont'd)

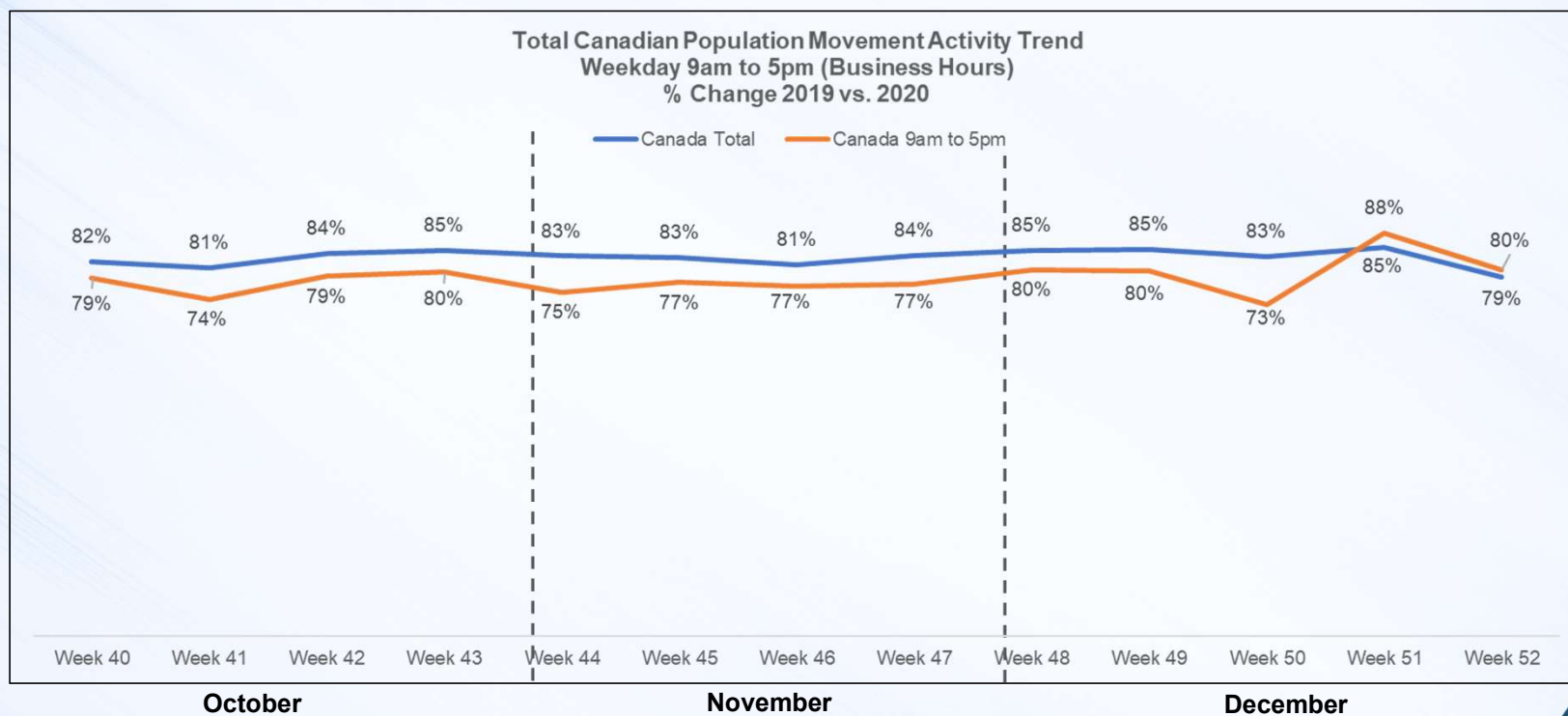
- Will you be ready when the “switch flips”?
  - Travel – experts agree that our need to travel and to enjoy experiences is insatiable.
  - Entertainment, bar and theatre districts will be swarmed as people return to these areas to socialize once again.
  - Cottage country – summer time is family & friends time; you can expect more family & friends time when we move into the ‘safe zone’ of vaccines and expanded outdoor spaces.
  - OOH has placements in all of these environments.
- Urban vs Suburban
  - Perhaps now we can all see that this isn’t a “versus” decision but an “and” choice.
  - Reaching people where they live is as important as where they work; but both are vital.
  - Downtown districts are neighbourhoods too.
  - Using a ‘day in the life’ approach to media planning will help you reach more touchpoints along this daily journey.
- Don’t miss out on great opportunities
  - The vast majority of OOH inventory is static inventory – from superboards and spectaculars to posters and street level, there are tens of thousands of excellent locations to utilize.
  - Exterior Transit does a better job than all other media (except flyers) in covering off both urban and suburban neighbourhoods door-to-door.
  - Impact – there is nothing larger than “large format” OOH.

# Thoughts on OOH Planning for 2021 (cont'd)

- OOH resonates with consumers
  - We can work with you to prove call to action, driving traffic to websites/APPs and retail stores.
- OOH buys you time with your customers
  - We're always on, 24/7, so we can reach your customer all day, every day.
- Market / Regional Variations
  - Ensure that you are taking into account market and regional variations; what works in one market or region does not necessarily work in others.
  - OOH campaigns can easily be customized by market; Pattison has more local market knowledge to help you plan and execute multi-market buys.
- A combination of OOH tactics may make your campaign better and help you deliver on multiple objectives at the same time.
  - Reach + Impact
  - GRP + Site Specific
  - Outdoor / Transit / Place-Based
  - Digital Outdoor + Digital Networks
  - Programmatic

## Across the country, the trends are similar:

- Total market mobility this past Fall has been consistently 80% - 85% of the same points in time year ago.
- Our “9 to 5” workday movement activity has been 75% to 80% compared to the same point in time year ago.
- In weeks 51-52, the Holiday Season appears to be the cause of more movement during the day



Environics Analytics MobileScapes Out & About Activity Trend (October-December 2019 vs. October-December 2020)  
 2019 = October 7<sup>th</sup>, 2019 to January 5<sup>th</sup>, 2020  
 2020 = October 5<sup>th</sup>, 2020 to January 3<sup>rd</sup>, 2021



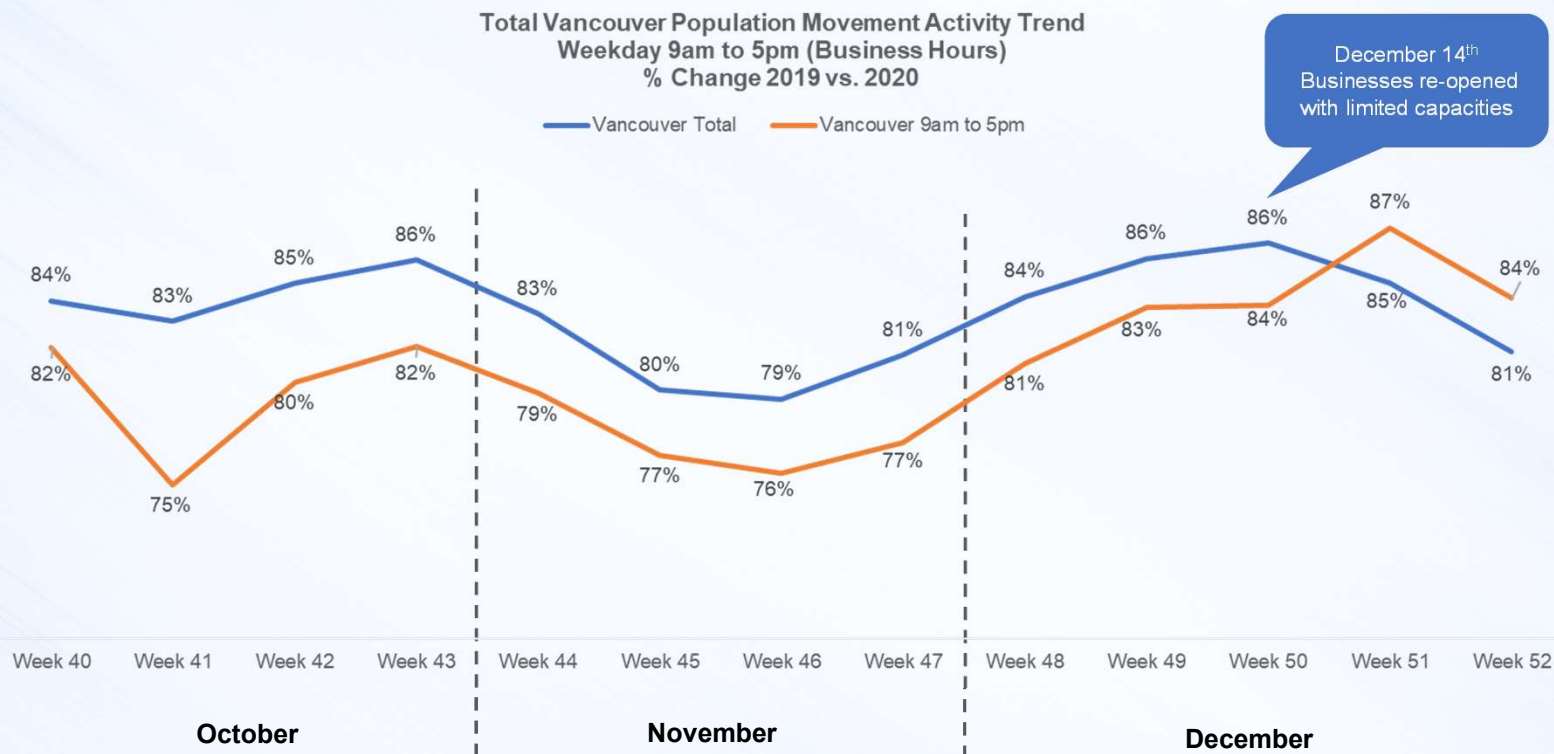
# % Range of Daily Movement Activity Summary

(% of same periods 2020 vs 2019)

Market	Total Daily Movement	9 to 5 Movement	9 to 5 "Spike" (week 51)
<b>Total Canada</b>	<b>81 – 85%</b>	<b>74 – 80%</b>	<b>88%</b>
Vancouver	80 – 85%	75 – 82%	87%
BC Interior	86 – 92%	84 – 90%	93%
Calgary	80 – 87%	75 – 80%	82%
Edmonton	80 – 87%	75 – 82%	85%
Regina	83 – 90%	69 – 85%	86%
Saskatoon	76 – 89%	61 – 85%	94%
Winnipeg	74 – 85%	63 – 77%	81%
Toronto	76 – 79%	64 – 71%	82%
Ottawa	76 – 82%	65 – 74%	87%
Montreal	74 – 82%	62 – 78%	87%
Quebec City	74 – 80%	66 – 76%	88%
Halifax	83 - 91%	79 - 87%	99%



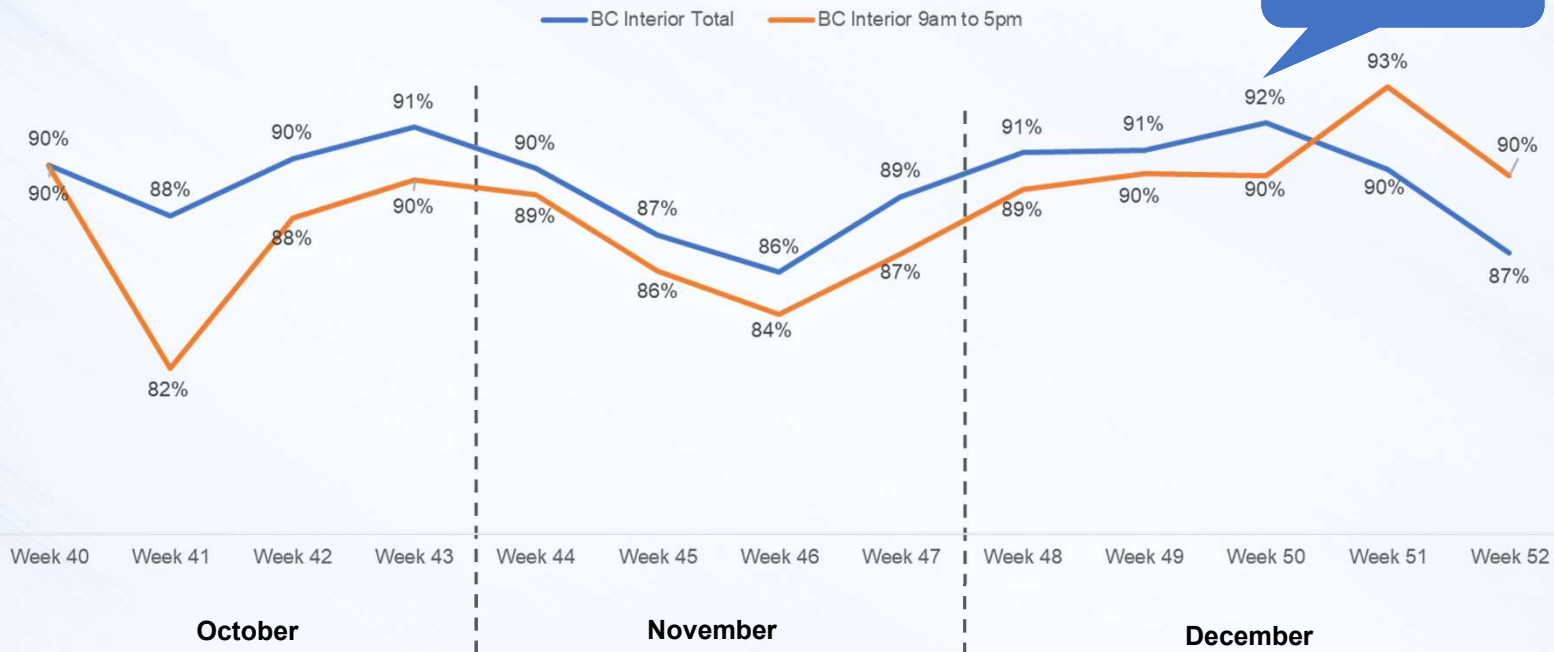
Vancouver has seen its daily movement activity, especially the 9 to 5 mobility, improve over the past four to six weeks.



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The BC Interior has been the most mobile market throughout 2020, with daily movement activity consistently greater than 85% to 90%.

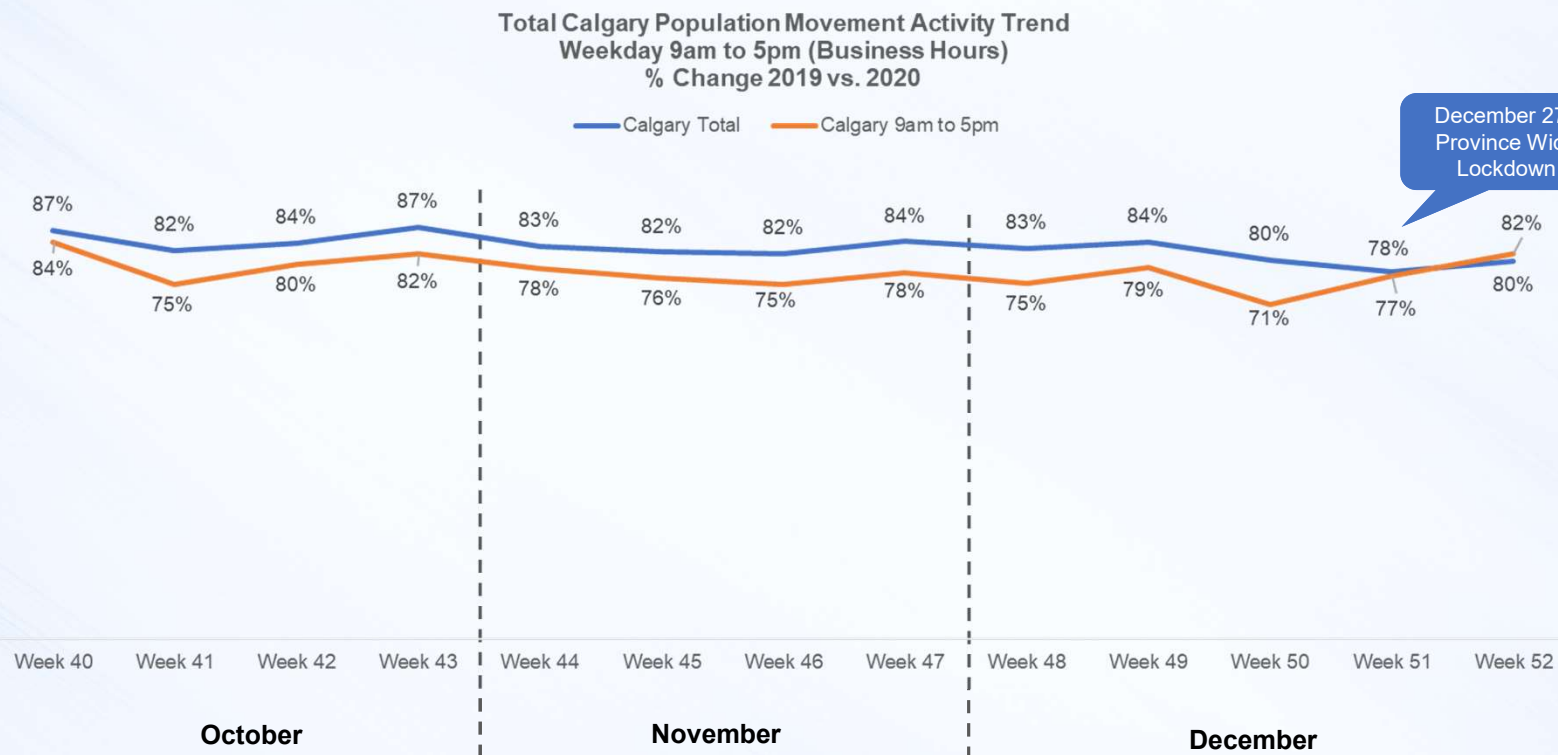
**Total BC Interior Population Movement Activity Trend**  
**Weekday 9am to 5pm (Business Hours)**  
**% Change 2019 vs. 2020**



December 14<sup>th</sup>  
 Businesses re-opened  
 with limited capacities

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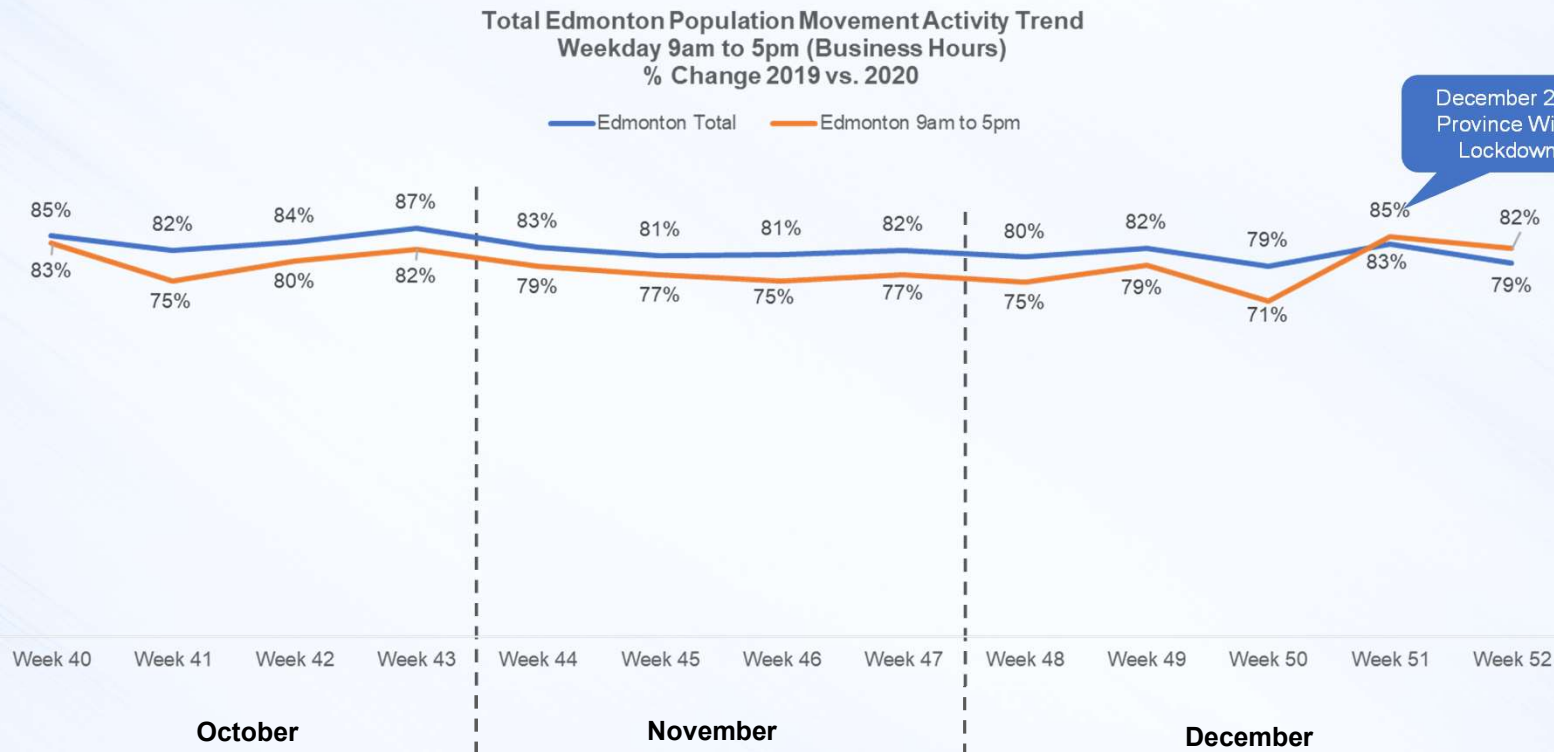
Both the total daily and 9 to 5 mobility in Calgary and Edmonton are almost identical.



December 27<sup>th</sup>  
 Province Wide  
 Lockdown

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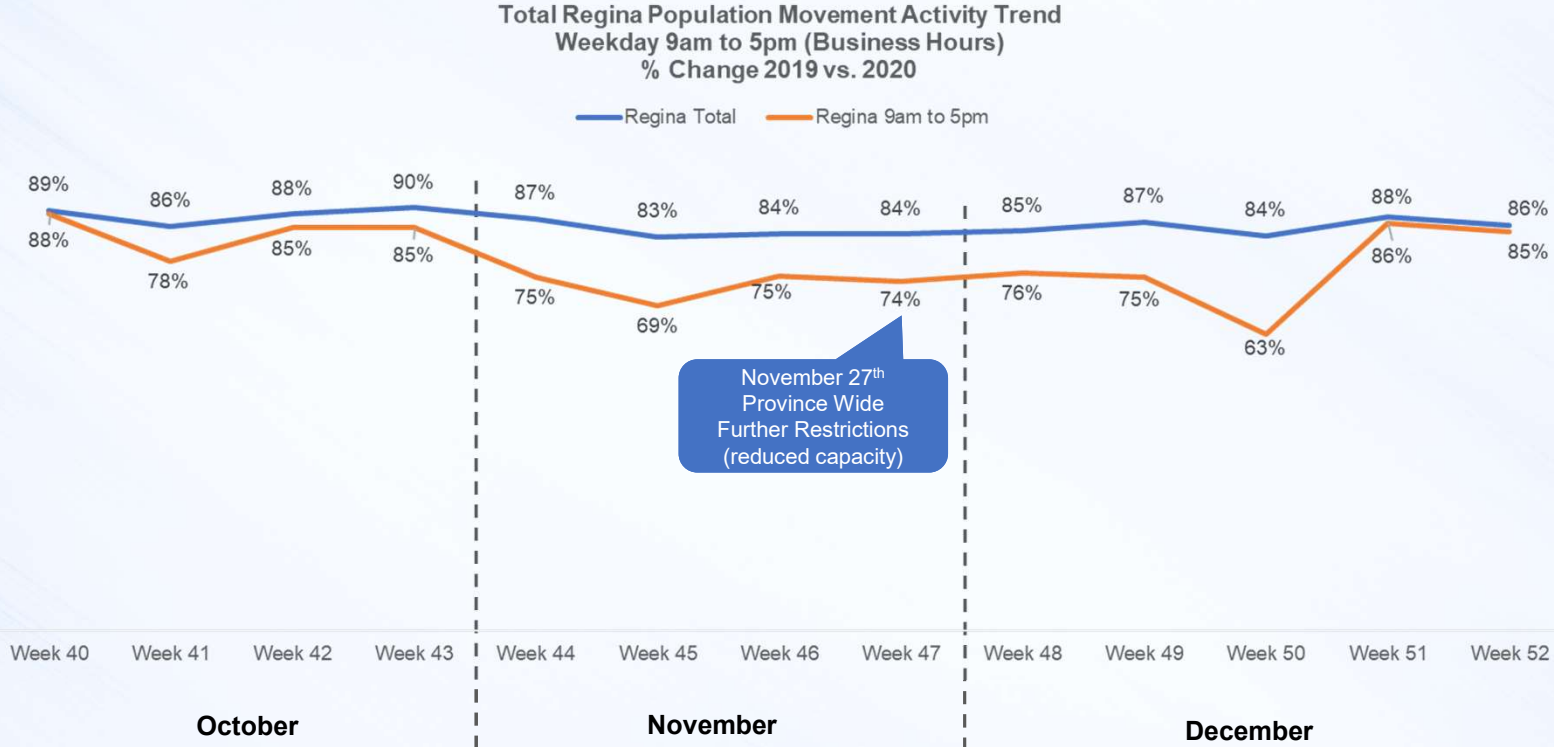
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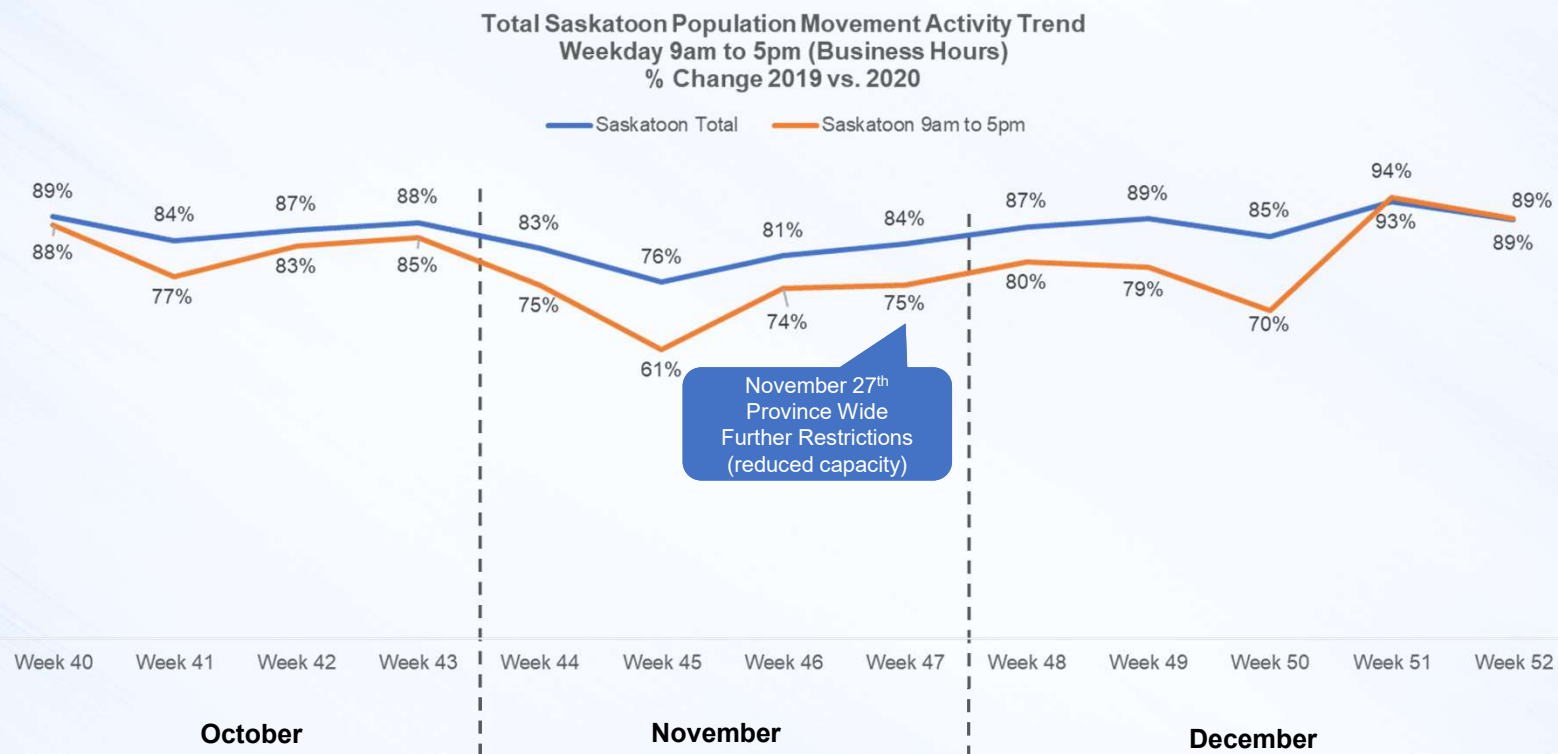
The markets of Regina, Saskatoon and Winnipeg experienced the largest fluctuations in 9 to 5 daily activity – in some instances in response to rising daily COVID case counts and government requests to restrict daily travel – while their total daily mobility remained relatively constant.



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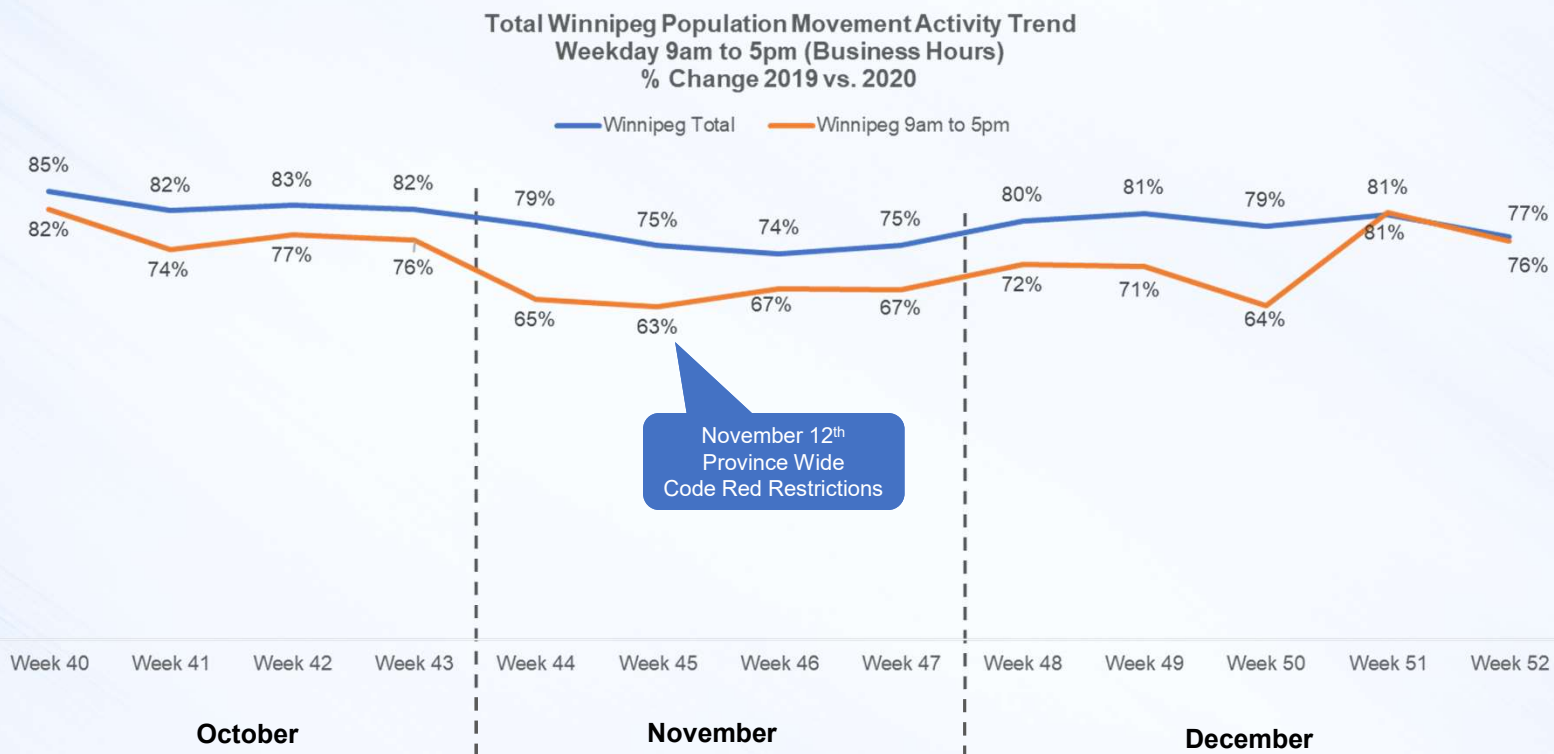
# Saskatoon

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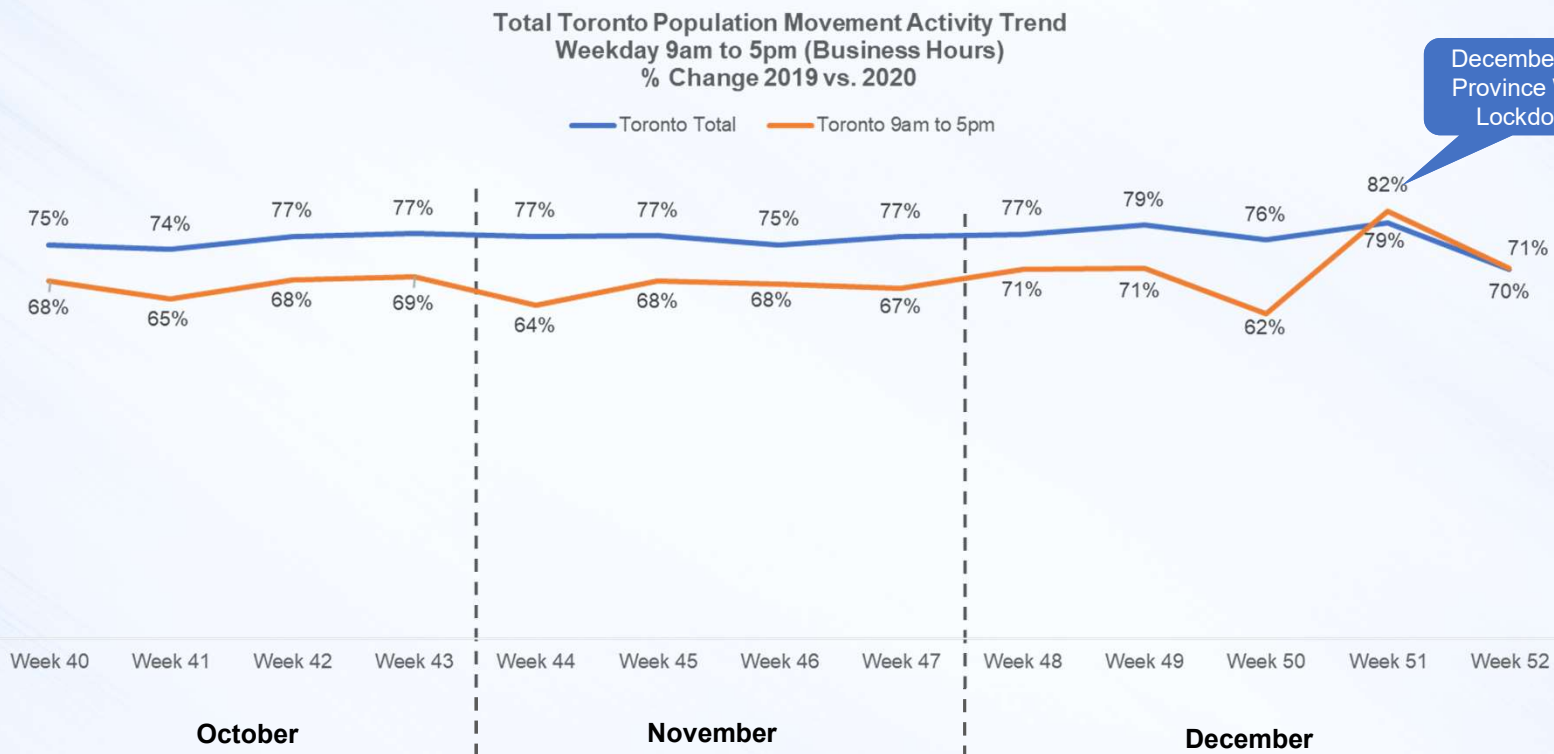
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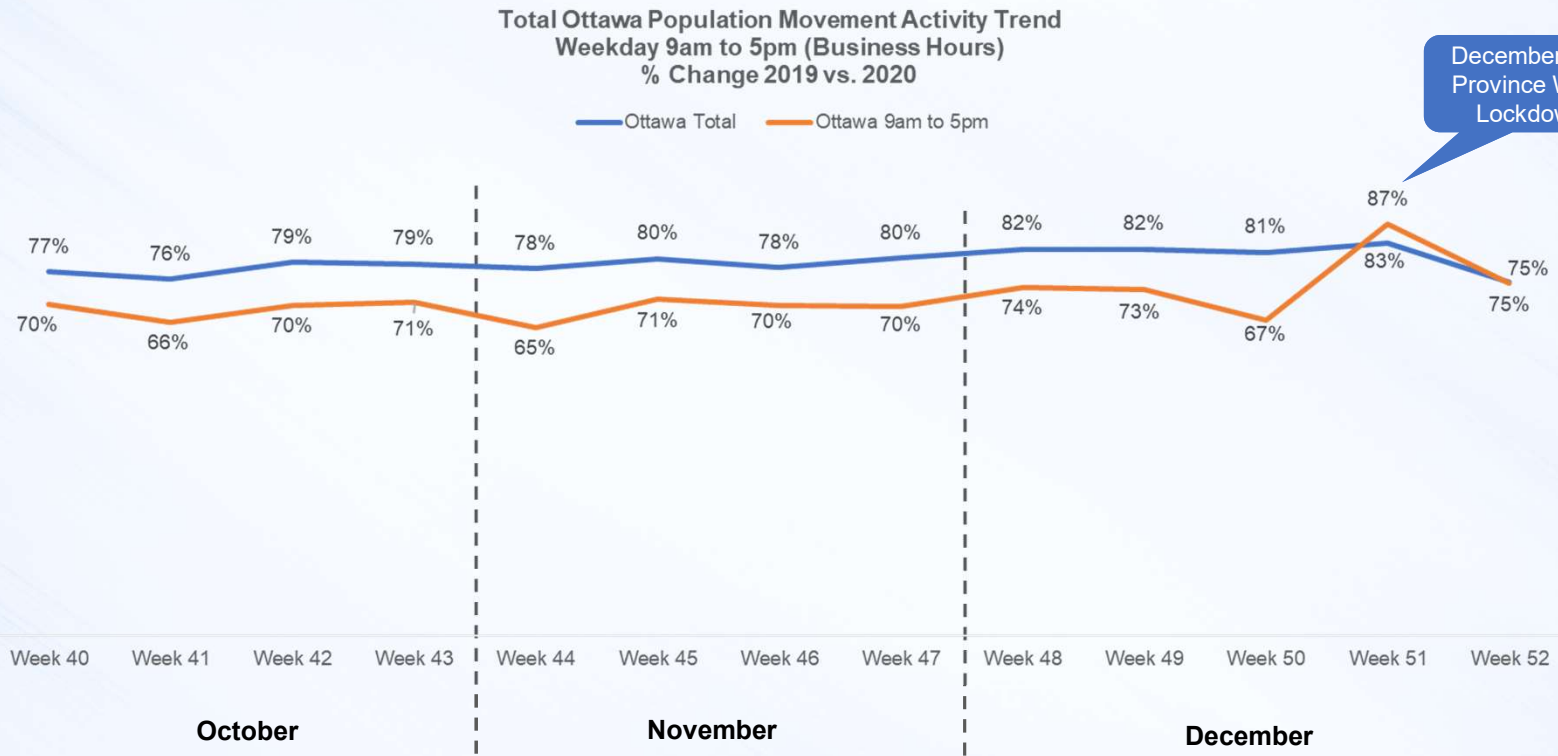
While total daily movement has remained constant in Toronto, there was a significant surge in the week leading up to Christmas in 9 to 5 activity as everyone prepared for the Holiday season as well as the “lockdown” that began on December 26<sup>th</sup>.



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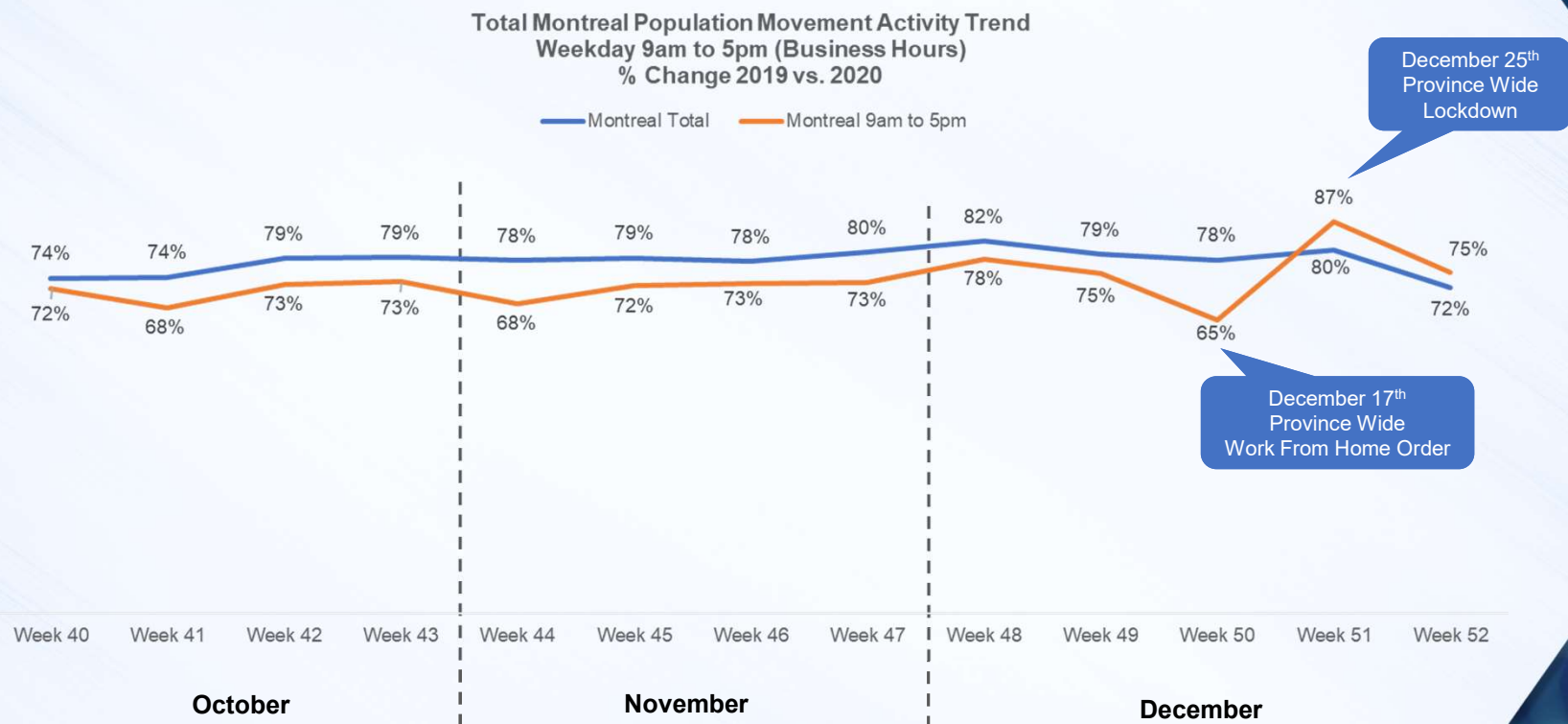
Like Toronto, Ottawa’s daily movement has remained constant, and there was a significant surge in the week leading up to Christmas in 9 to 5 activity as everyone prepared for the Holiday season as well as the “lockdown” that began on December 26<sup>th</sup>.



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# Montreal

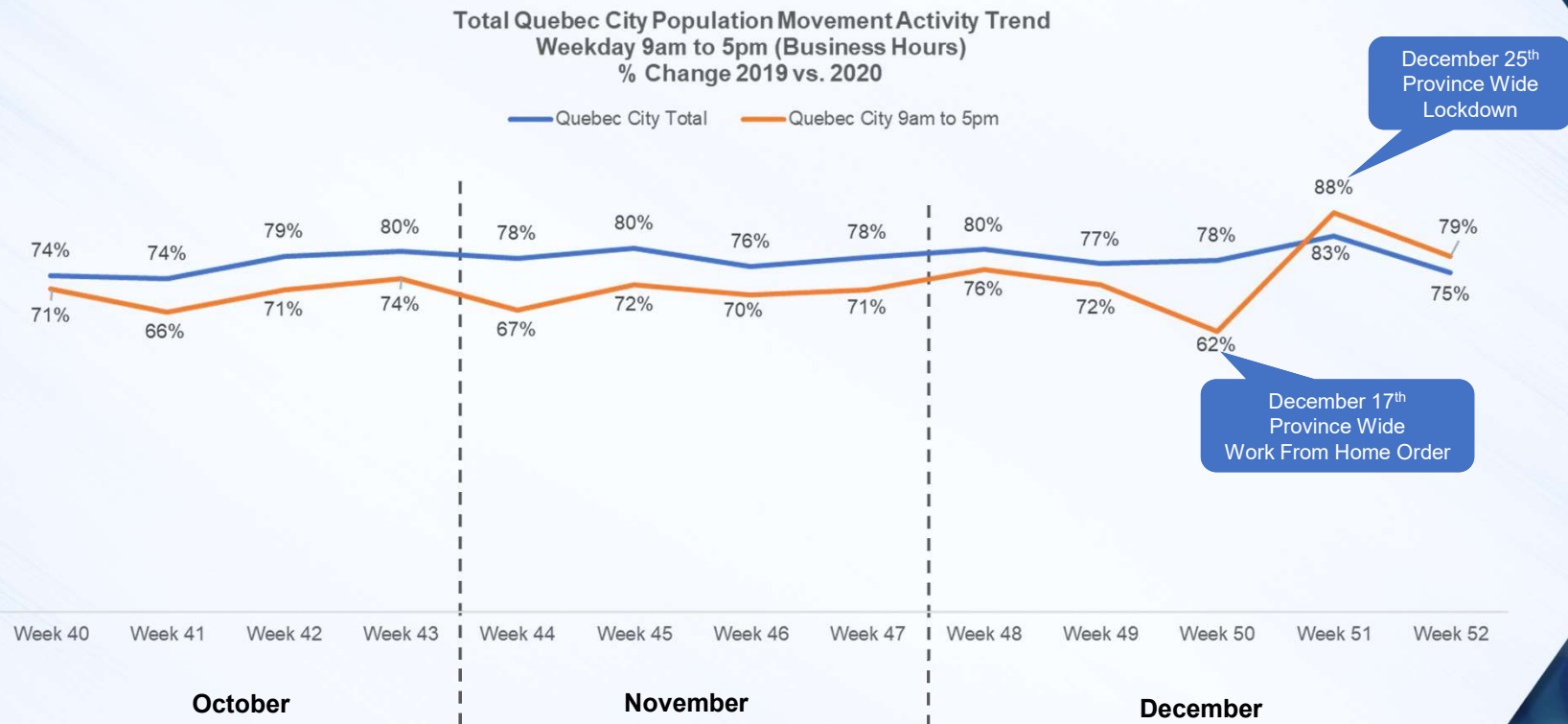
The province-wide 'work from home' order did not deter Montrealers from finishing up their Holiday shopping; and it is still to be determined if the province-wide lockdown will reduce daily traffic.



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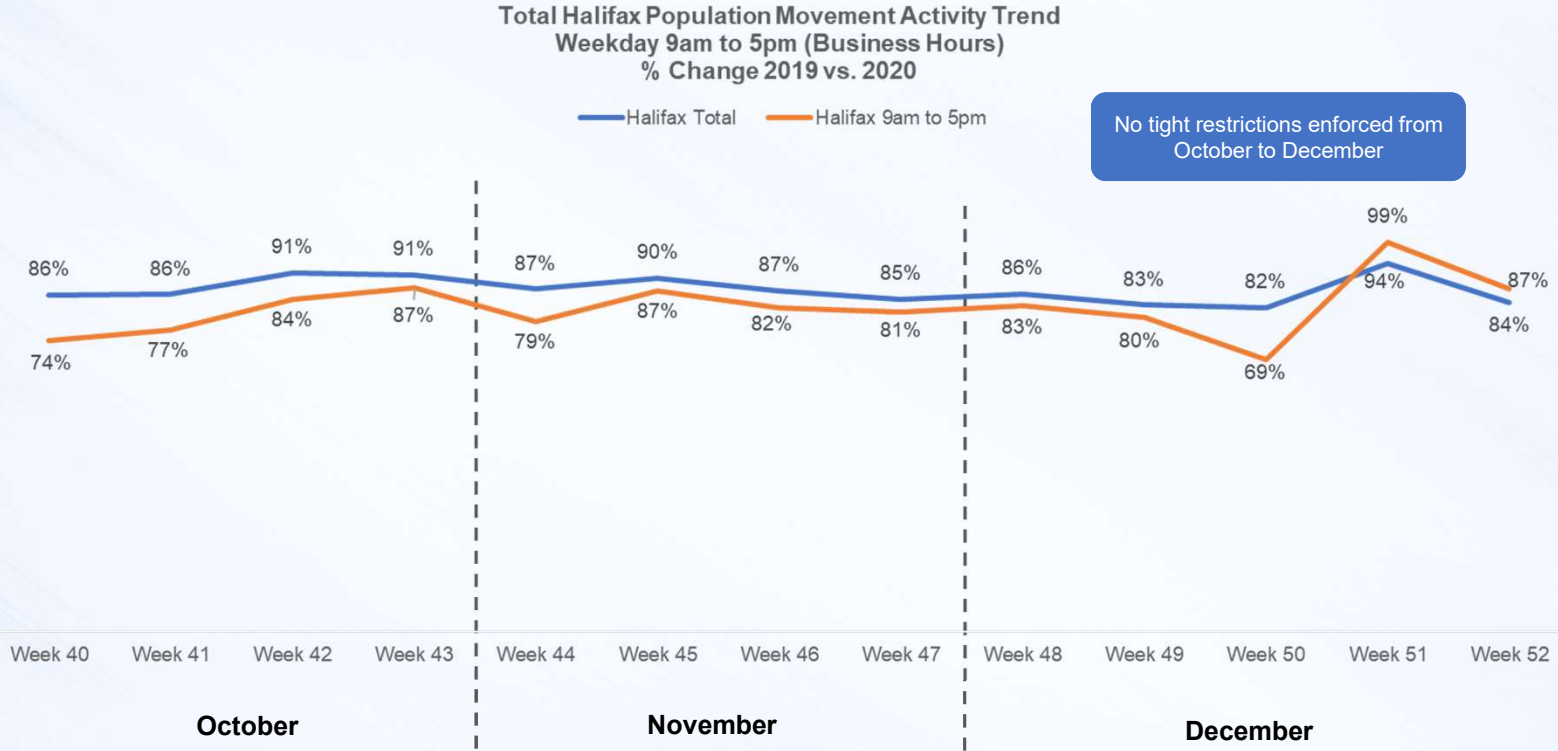
# Quebec City

The province-wide 'work from home' order did not deter Quebec City residents from finishing up their Holiday shopping; and it is still to be determined if the province-wide lockdown will reduce daily traffic.



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Daily movement activity in Halifax is second only to the BC Interior. The Atlantic 'bubble' helped Haligonians retain much of their daily routines.



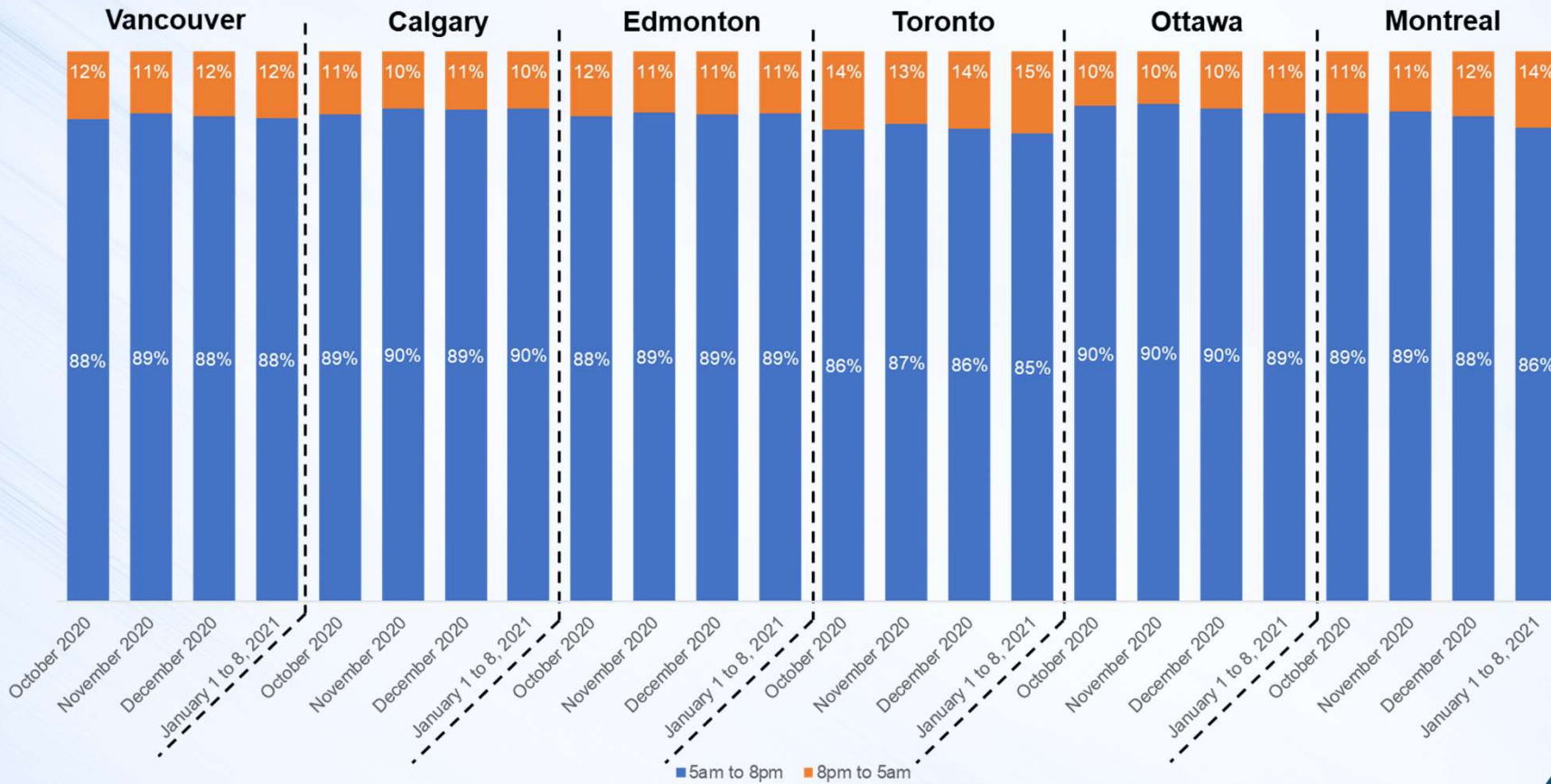
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## Implications of 8pm Business Closures or Curfews

- The purpose of these mandated evening closures (Ontario) or curfew (Quebec) is to try to reduce community spread of the COVID-19 virus.
- The volume of traffic that is 'out and about' after 8pm until 5am is a minor part of the overall daily traffic.
- The following slide highlights that the % of total traffic between 8pm and 5am in the major markets is between 10% and 15% of the total daily traffic.
- The majority of daily traffic, 85% to 90%, is captured between 5am and 8pm, during our "daily routines".

## Traffic Comparison – 5am to 8pm vs 8pm to 5am (October 2020 to January 8<sup>th</sup>, 2021)

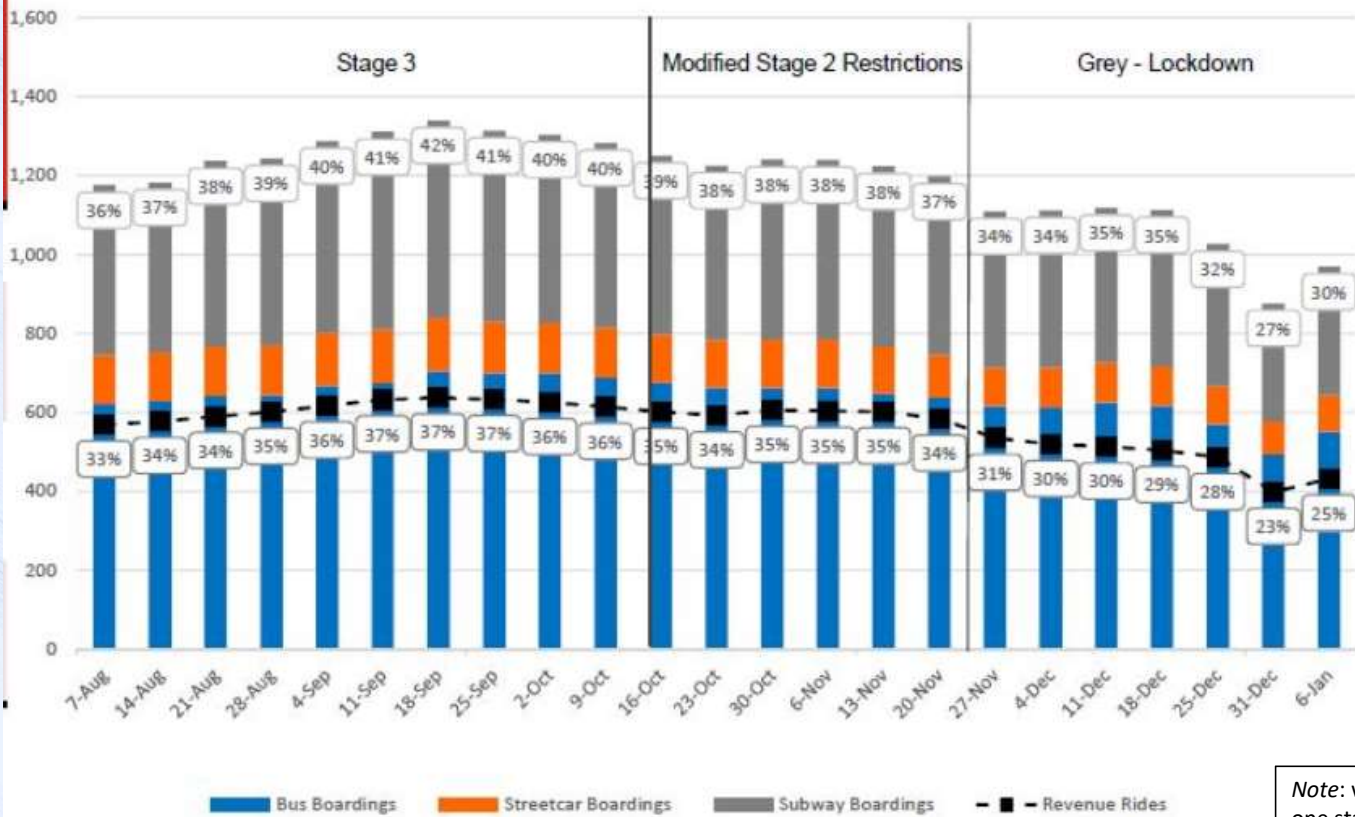


Pelmorex Location Insights data is taken from October 1<sup>st</sup>, 2020 to January 8<sup>th</sup>, 2021 (Baseline: October 1<sup>st</sup>, 2020 to January 8<sup>th</sup>, 2020 - 24hours data) in various CMAs. \*The information presented here is anonymous, aggregated, and permission-based GPS location 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 October 1<sup>st</sup>, 2020 to January 8<sup>th</sup>, 2021.

# Impact of Provincial Measures on TTC Ridership

- Weekday daily ridership on the TTC remains much higher than it was last April/May 2020.
- Subway weekday ridership has fluctuated between 30% more recently and 42% in September of pre-COVID levels. After averaging between 450,000 – 500,000 daily during the Fall, Subway weekday ridership most recently is 326,000 – 392,000. This is still a significant weekday daily audience.
- Bus ridership has fluctuated between 552,000 and 699,000 daily, averaging between 25% and 37% of pre-COVID ridership levels.
- The TTC surface fleet – buses and streetcars – is operating between 85% to 100% of service, offering an excellent opportunity for exterior transit advertising throughout the market and especially in the suburbs.

Boarding by Mode & Revenue Rides



<sup>1</sup>Revenue Rides provided by Finance % of pre-COVID Weekday Ridership (March 2020 baseline)

Note: week ending December 25<sup>th</sup> includes one statutory holiday; week ending December 31 includes two statutory holidays (Boxing Day and New Year's Day).

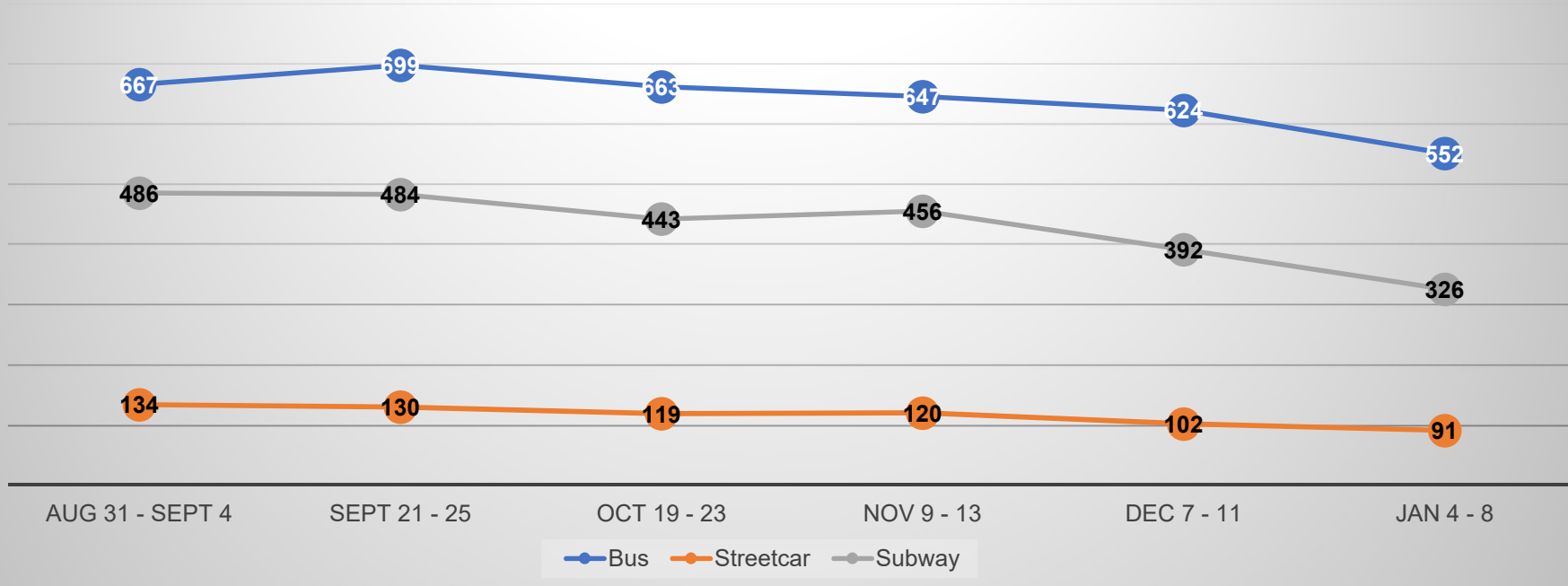
# Impact of Provincial Measures on TTC Ridership





# Impact of Provincial Measures on TTC Ridership

TTC: Average Weekday Ridership (000)



Source: Toronto Transit Commission

The background is a vibrant blue digital landscape. It features a grid of binary code (0s and 1s) that appears to be receding into the distance. A white outline of a world map is overlaid on the grid, with a blue circle highlighting a specific region in the Southeastern United States. Various glowing blue geometric shapes, such as triangles and polygons, are scattered throughout the scene, some appearing to float or move. The overall effect is one of high-tech connectivity and global reach.

**THANK  
YOU**

**PATTISON**