

SPECIAL REPORT

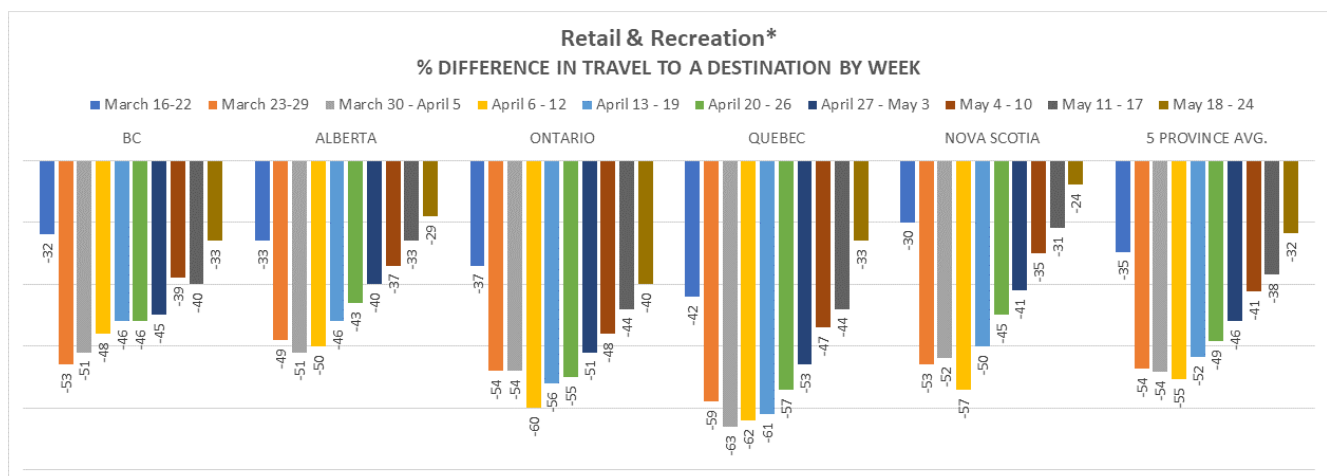
Out of Home Activity Level Increases as COVID-19 Restrictions Are Lifted

June 3rd, 2020

This is COMMB's 4th Special Report on Canadian's travel and activity levels during the COVID-19 pandemic. COMMB sourced mobility data from mapping software and mobile device data along with coinage collection data from digital jukeboxes for this report.

Data that tracks consumer movements shows an increasing trend in out of home activity compared to the lows experienced during the early stages of the pandemic in late March/early April. These numbers are encouraging and show how Canadians are increasing their travel and activity patterns as restrictions are lifted.

The largest upswing in activity occurred in Retail & Recreation with Quebec having the highest increase of 11 percentage points, from the previous week of May 11-17, followed by British Columbia and Nova Scotia with 7 points. The 5-province average was up 6 percentage points, for the same period, to -32% below baseline numbers.



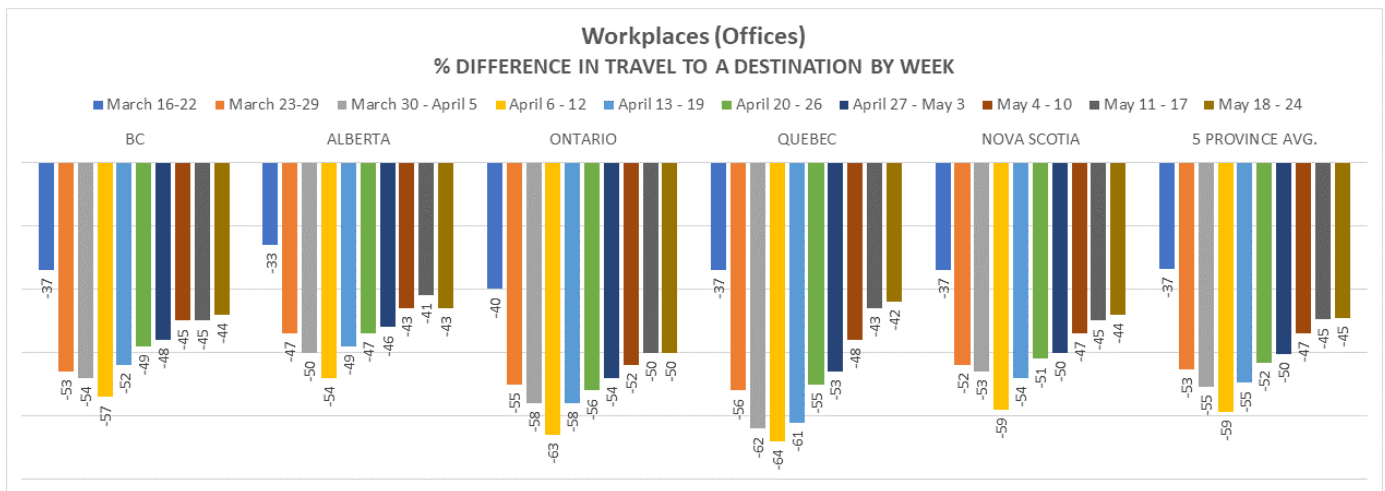
* Includes restaurants, cafes, shopping centres, theme parks, museums, libraries, and movie theaters



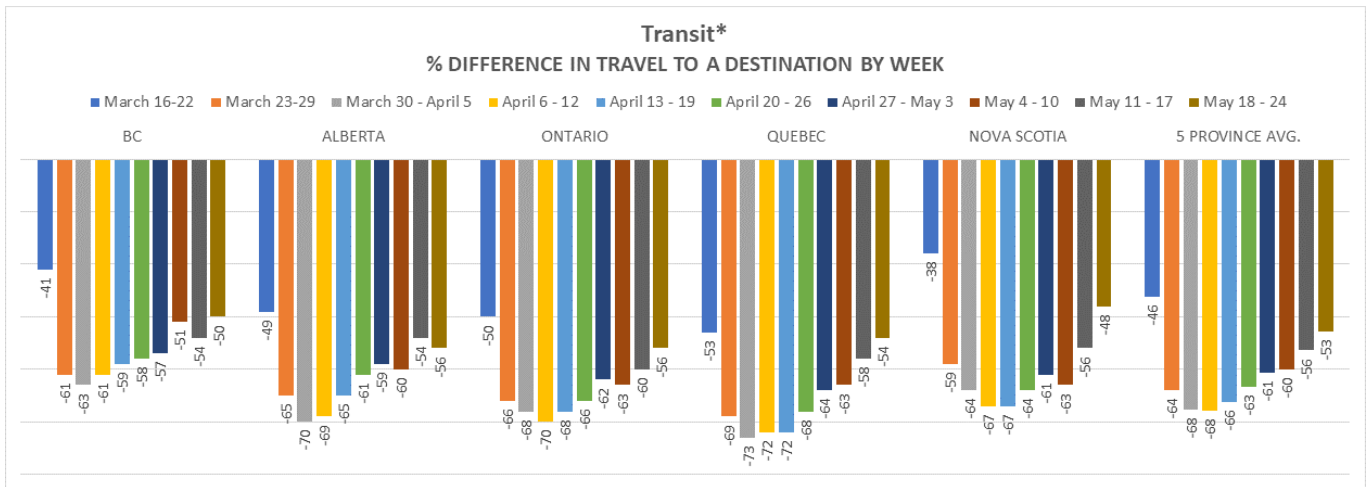
In May, shopping centres started to open their doors across Alberta, British Columbia, Saskatchewan, Manitoba, New Brunswick, and Prince Edward Island. In Ontario and Quebec, only retail stores with street entrances opened for business.

As resto-bars re-open, coinage from digital jukeboxes shows increased use by patrons. Comparing YOY data for the week of May 18-24, Alberta reported coinage at 87% for the 49 open venues and British Columbia at 82% for the 13 open venues. For the week of May 25-31, Alberta reported coinage at 55% for 81 open venues and British Columbia at 110% for 21 open venues.

Workplace activity across the 5-provinces showed a 14-percentage point upturn, from the week of April 6-12, to -45% the week of May 18-24. Quebec reported slightly higher at -42% and Ontario increased by 13 percentage points to -50% below normal benchmarks.



Transit saw a 3-percentage point uplift in activity across provinces to -56% from last week, and as provinces re-open and people return to work, use of transit is expected to increase. Nova Scotia reported the highest increase in transit use with an 8-percentage point increase since May 11-17.



* Includes public transport, hubs such as subway, bus, and train stations

Mobile device data on specific intersections and areas in Toronto, Montreal and Vancouver also show an increase in activity. Most noticeably, traffic in transit hubs has bounced back to mid-March numbers from low periods in April.

Data over a 5-week period starting January 3rd to February 6th was used as a baseline to calculate the % difference by week, for the three graphs above. The sample used in this data is based on devices with opted in location history settings on their devices.

COMMB continues to review the impact of COVID-19 on OOH's audiences and will provide future updates.