

VISTARMEDIA

Supporting Our Partners in the Wake of COVID-19

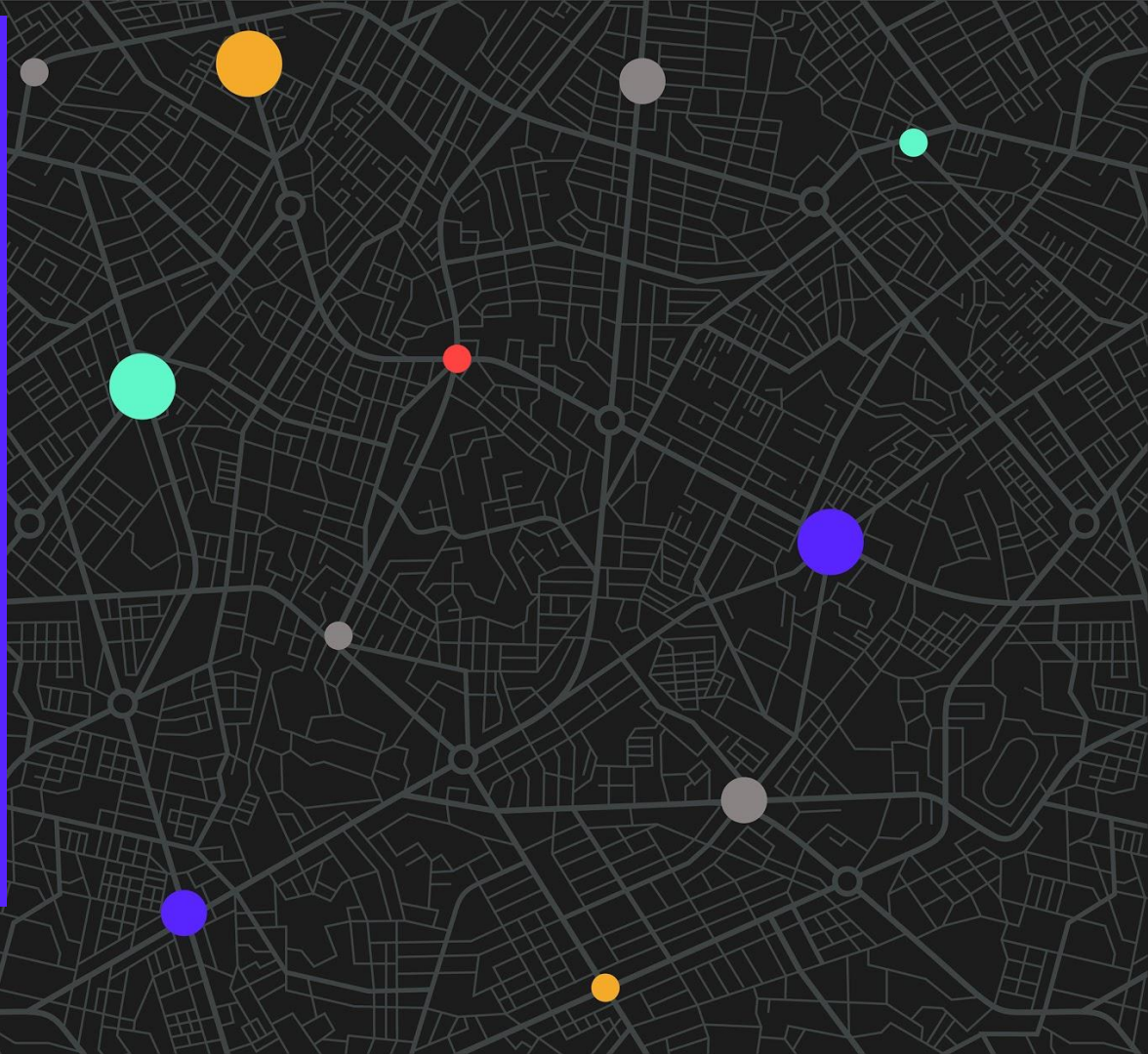
Volume 3: April 29, 2020



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, U.S. traffic is down.

-51%

Decline in overall U.S. traffic between March 3rd - April 26th, 2020.
However, traffic has been stable since the beginning of April and this past week saw an increase in traffic.

**Traffic = number of unique devices observed surrounding venues.*

Trends to Date

Nearly all DMAs have seen stable traffic levels since the beginning of April and all DMAs have seen an increase in week over week traffic when comparing the week of April 26th to April 19th.

Many of the DMAs that have seen the greatest increase in traffic week over week are in Florida where some beaches are beginning to reopen. We believe these increases could indicate the start of the rebound in traffic at least at a regional level.

The list to the right shows the DMAs with the greatest increase in traffic from April 19th to April 26th.

GREATEST INCREASE IN WEEK OVER WEEK

% CHANGE IN TRAFFIC:

Panama City, FL

West Palm Beach-Ft. Pierce, FL

Traverse City-Cadillac, MI

Ft. Myers-Naples, FL

Grand Rapids-Kalamazoo-Battle Creek, MI

Palm Springs, CA

Orlando, FL

Minot-Bismarck-Dickinson(Williston), ND

Minneapolis-St. Paul, MN

Tampa, FL

Trends to Date

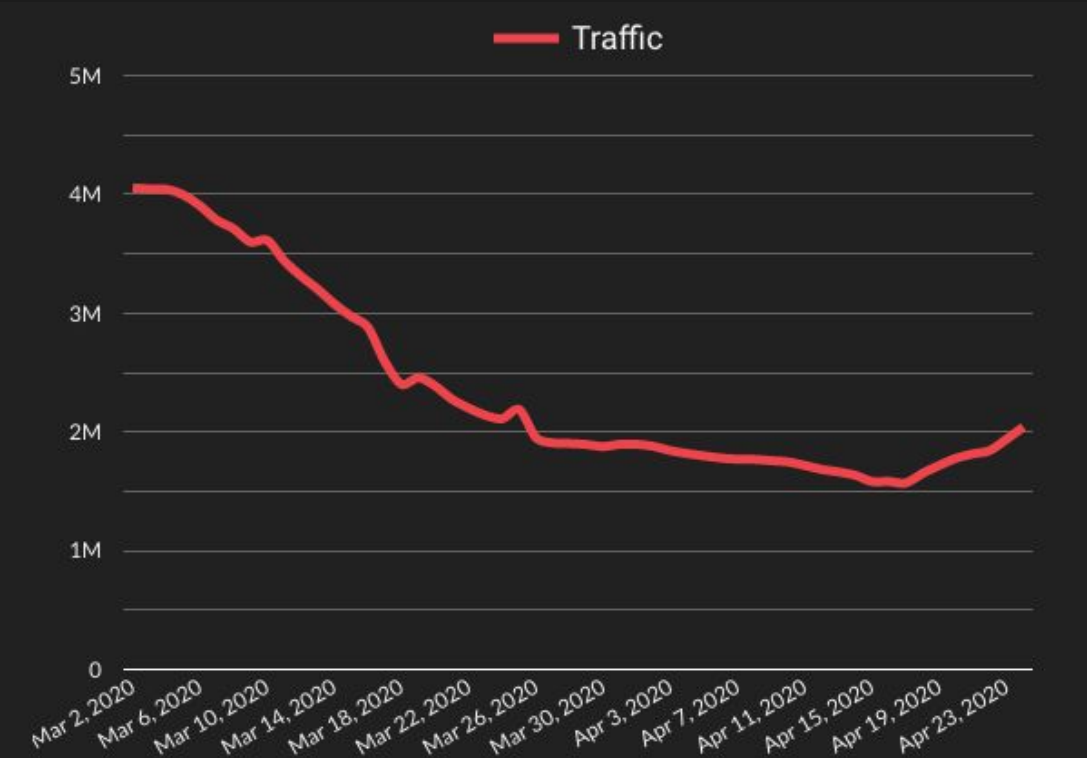
Taking a look at the top 10 DMAs, many of these are among the DMAs that have seen the greatest declines in traffic since the beginning of COVID-19 but are also seeing increases in week over week traffic. Among these DMAs, it appears most southern DMAs have experienced smaller decreases in traffic than other regions -- with Houston only having a -45% decrease and Atlanta and Dallas-Fort Worth only having a -46% decrease.

Week Over Week % Change in Traffic by Top 10 DMAs

DMA Name	Week 1-2	Week 2-3	Week 3-4	Week 4-5	Week 5-6	Week 6-7	Week 7-8	Week 1-8
New York	-22%	-38%	-30%	-10%	-9%	-9%	24%	-68%
Los Angeles	-15%	-36%	-21%	0%	-12%	0%	26%	-52%
Chicago	-16%	-35%	-26%	4%	-3%	-13%	27%	-55%
Philadelphia	-32%	-40%	-3%	-10%	-19%	-14%	19%	-71%
Dallas-Fort Worth	-18%	-24%	-20%	-6%	2%	-6%	20%	-46%
San Francisco-Oakland-San Jose	-27%	-42%	-22%	-1%	-6%	11%	18%	-60%
Washington, D.C.	-18%	-31%	-23%	-8%	-8%	-10%	20%	-60%
Houston	-16%	-22%	-23%	-4%	-1%	-7%	23%	-45%
Boston (Manchester)	-18%	-33%	-25%	-4%	-3%	-13%	20%	-60%
Atlanta	-14%	-26%	-18%	-5%	-6%	-3%	18%	-46%

*Percentage changes reflect week-over-week trends.

Traffic in the U.S. From March 2 - April 26



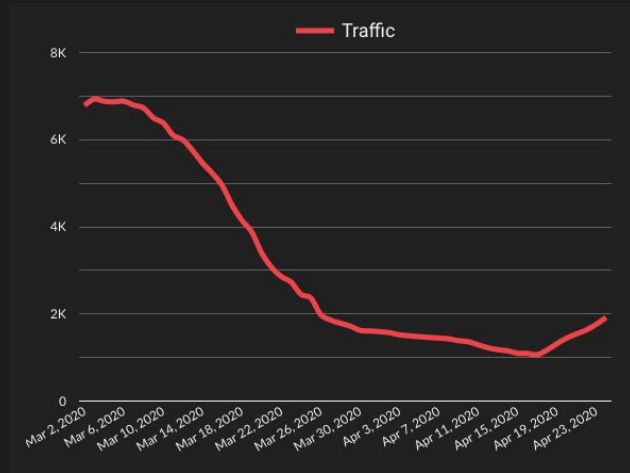
Throughout the month of April, the decline in traffic around DOOH venues leveled off and now we are seeing an uptick in traffic at the end of April.

Looking at traffic holistically, the chart here shows an increase in traffic around DOOH venues since April 19th.

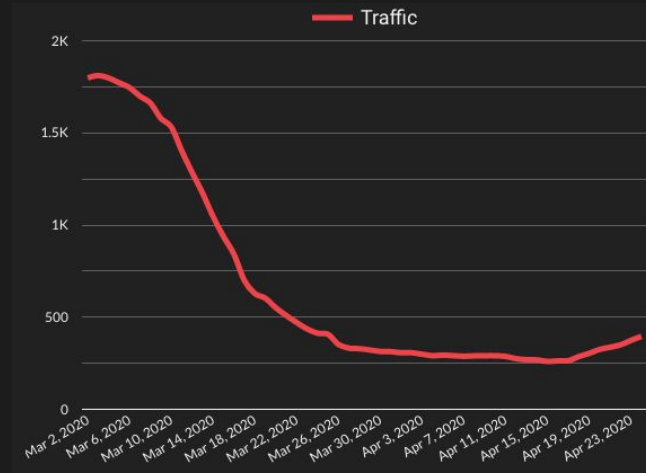
Travel Sector Impact

While the travel industry is among the industries most affected by COVID-19, we are starting to see a bounce back in traffic to these DOOH venues. Airports and Hotels are among the venues seeing the strongest increases in traffic week over week. The top 5 venues that saw the greatest increases in traffic from April 19 - April 26 were Airports, Office Buildings*, Hotels, Transit and Gas Stations.

AIRPORT TRAFFIC



HOTEL TRAFFIC



*Inventory avails may be limited

Impacted Venue Types

While traffic to all venue types is down since the beginning of COVID-19, the impact varies significantly by venue type.

LEAST AMOUNT OF DECREASE IN TRAFFIC:

Fuel Stations	Convenience Stores
Grocery Stores*	Residential Buildings
Gas Stations	QSR
Retail	Financial Services
Veterinarian Offices	Doctors Offices
Liquor Stores	Billboards

**Grocery store data is limited*

GREATEST AMOUNT OF DECREASE IN TRAFFIC:

Malls	Cafes
Sports Arenas	Schools
Sports Entertainment	Office Buildings
Businesses & Services	Airports
Gyms	Salons
Hotels	Entertainment

FAQs

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 [see “Location Data Analysis” for more details].

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?

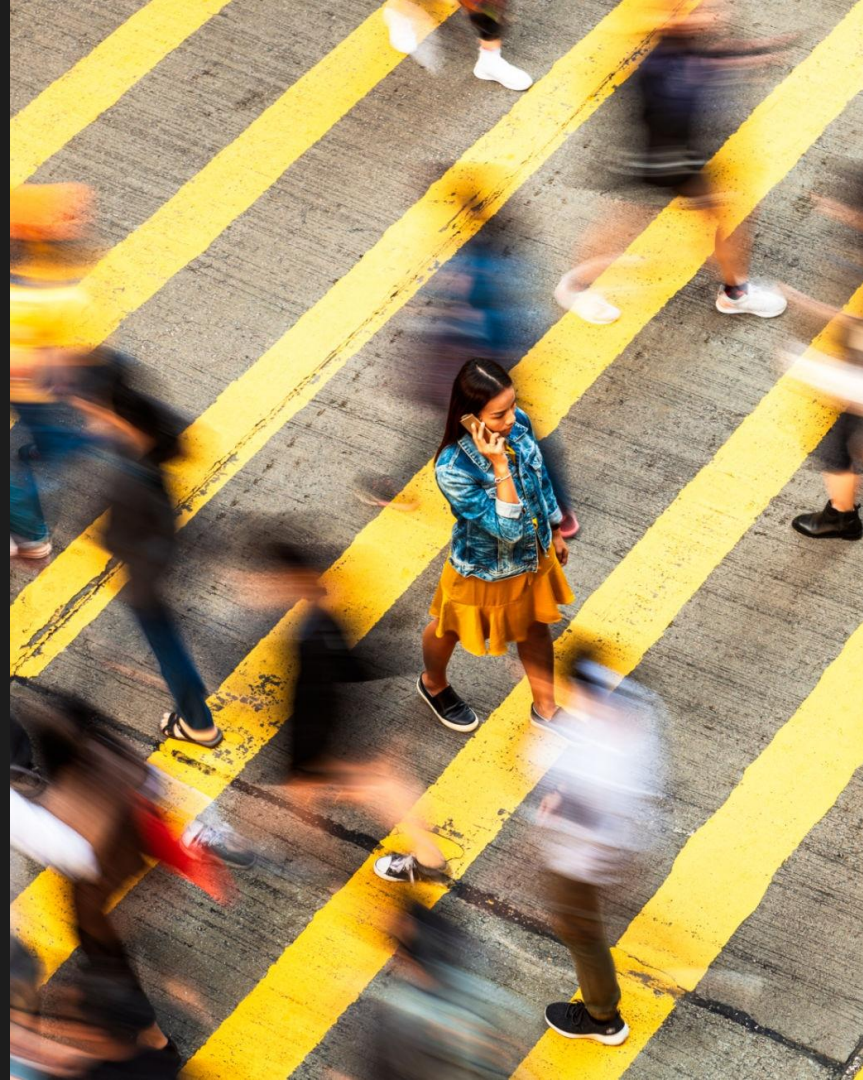
One of the biggest benefits of activating out-of-home programmatically is flexibility. With Vistar, you can easily adapt a strategy, whether that means shifting budget to DMAs that are less impacted, removing venue types that have restrictions placed on them, or choosing to pause/postpone a campaign. 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.

How are impressions and CPMs being impacted by changes in consumer behavior?

The impression data in the Vistar platform comes directly from our media owner partners, and relies on data from auditing bodies such as Nielsen and Geopath. Both Nielsen and Geopath analyze data over lengthy periods of time to determine impression metrics, so it is likely that any immediate changes in consumer behavior may not be reflected right away. We are continuing to work directly with these auditing bodies and our media owners to understand how we can get the most accurate data available. Certain media owners are proactively adjusting their impressions based on individually available data (such as credit card transactions).

While there is no playbook on how to navigate this situation, we are confident that the auditing bodies, media owners and Vistar are taking every step possible to provide accurate, reliable data. In the meantime, our team is available to make recommendations about adapting campaign targeting if you have concerns about any current set up.



How is Vistar handling venues that are no longer open or restricted due to regulations & recommendations?

Requests & delivery will be limited across the below venues due to COVID-19 government restrictions for non-essential business & services:

- BARS • CASUAL DINING • COMMUNITY CENTERS
- FAMILY ENTERTAINMENT • GYMS • MALLS • MOVIE THEATERS
- OFFICE BUILDINGS • SALONS • SCHOOLS • SPORTS ARENAS
- SPORTS ENTERTAINMENT CENTERS • UNIVERSITIES

FOR ACTIVE CAMPAIGNS: Please work with your Vistar Media support team to optimize campaigns to make sure they deliver in full.

FOR FUTURE CAMPAIGNS: The available impressions in Planning will be impacted for future months; please contact the Vistar support team when creating plans so they can provide accurate estimates and media owner contact information as needed.



ADDITIONAL RECOMMENDATIONS

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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