

THE MODERN TRENDS OF COVID-19



SPECIAL REPORT

**Canadian Travel Behaviour Affected by
COVID-19 Health & Safety Restrictions**

February 23, 2021

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A brief message from COMMB's president.

Throughout 2020, COMMB observed travel patterns to understand the affect on consumer behaviours and traffic trends, leveraging data from our members, Apple, Google and other publicly sourced information. At the time, we anticipated this to be a temporary solution, but recognize the value in a more granular, detailed level of insights across Canada. With that in mind, this is the final report in the originally launched series, providing insights through to January 2021.

In Q2-2021 we will launch with a more robust insights report at a more frequent interval of release. Expect to see detailed information from COMMB including product and road type variance, outdoor vs. place-based variance and much more across the top 10 markets in Canada (*Toronto, Montreal, Vancouver, Calgary, Edmonton, Quebec, Ottawa-Gatineau, St. Catharines-Niagara, Winnipeg & Hamilton*) as well as 7 regional markets (*Grand Falls-Windsor, Greater Sudbury, Kentville, North Bay, Sault Ste. Marie, St. John's & Timmins*). As we move forward in 2021, COMMB will continue to evolve and assess the impacts of COVID-19 in support of our members and the OOH industry to maintain and increase market share.

Sincerely,

Amanda Dorenberg
President, COMMB

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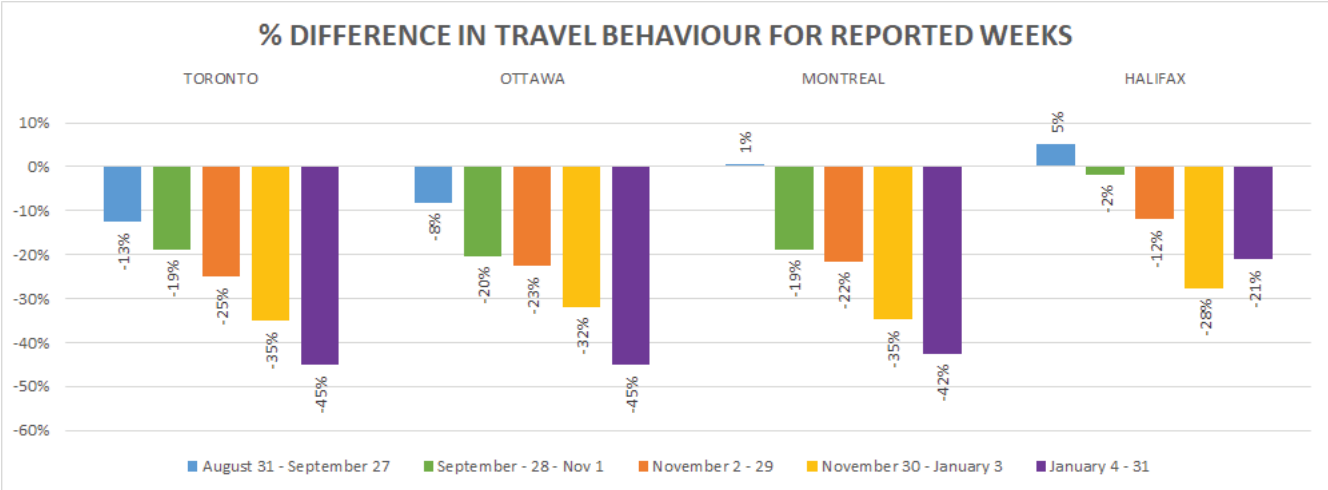
COMMB has conducted a review of traffic data to assess changes to travel behaviour since the onset of the COVID-19 pandemic. The review included sourcing mobile location data on over 12,000 geo-fenced static and digital outdoor advertising faces, publicly available data sources such as Apple, and geolocation mapping applications that provide insights such as driving direction. Data from these sources has been analyzed and output for multi-week periods to provide insight and illustrate a representative snapshot of travel behaviour, by market as well as a 7 market average.

Certain provinces experienced a second wave of lockdowns resulting from increases in the number of COVID-19 cases. This occurred

across the country towards the end of 2020 and into 2021. The pandemic has driven changes in customer behaviour as a result of these travel restrictions, provincial, regional and/or municipal lockdowns and stay-at-home orders.

Starting in January 2020 through to March 15th, data from 9 weeks was used as a baseline to calculate the % variance by week, for which the following weeks and months were averaged. The information and visuals within this report illustrate monthly travel behaviour changes from September 2020 through January 2021 within 7 major markets across Canada, we've broken these into Eastern and Western Canada.

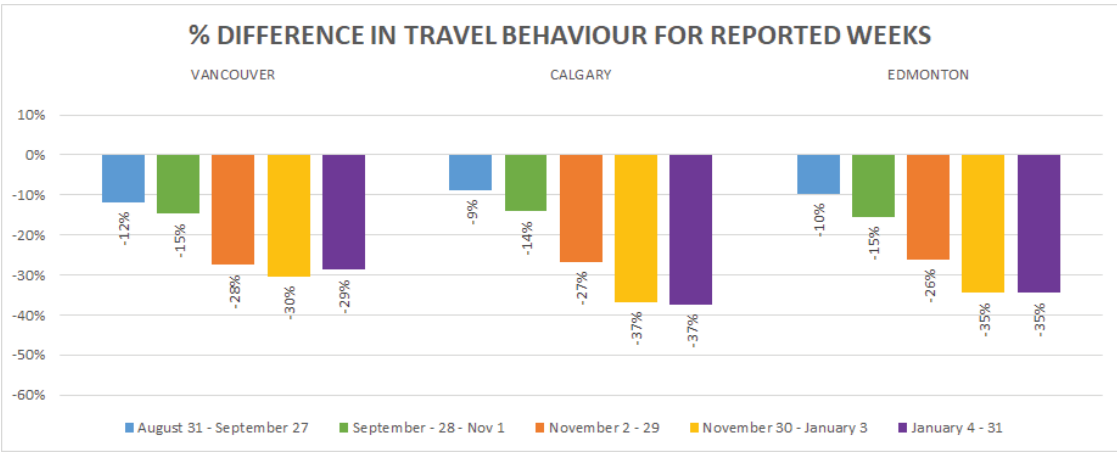
EASTERN CANADA :



Ontario markets studied, Toronto and Ottawa, show similar declines in the most recent months from December to January 2021, down 10 points to -45%, reflecting the municipal restrictions implemented in late November in the Toronto market and further province-wide restrictions implemented in December. Montreal has seen a decline of 7 points to -42% as a result of provincial restric-

tions and curfews, less local, regional and inter-provincial travel over the holiday season and into the new year. Halifax was not nearly as affected and showed slight increases in travel behaviour up +7 points to -21%, for the same time period, indicating a significant trend in consumer behaviours following increased cases of COVID-19.

WESTERN CANADA :

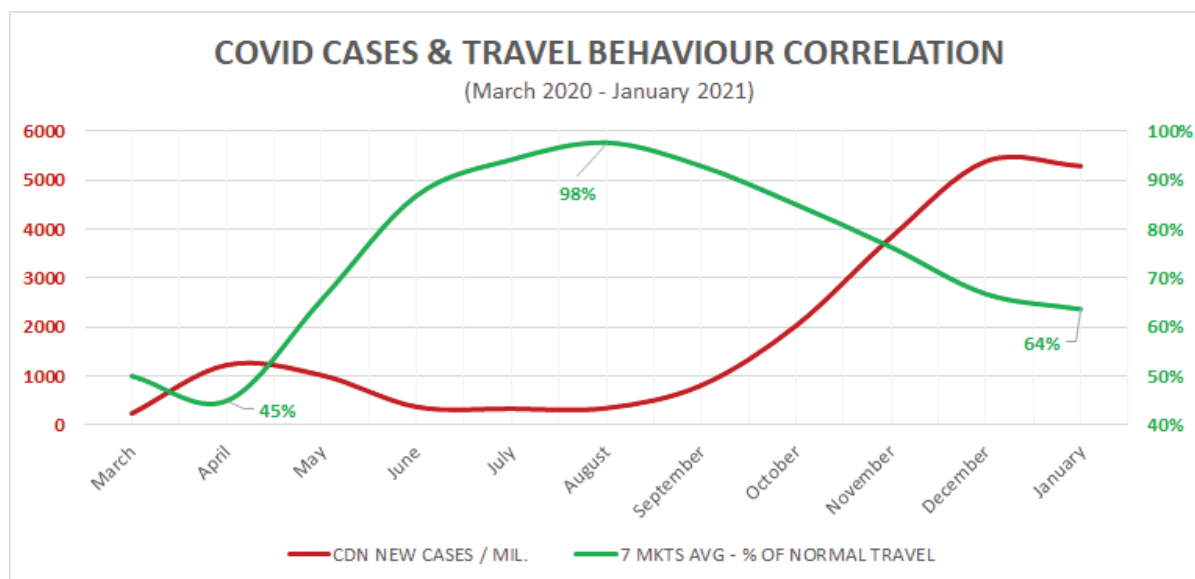


There was little change in travel behaviour in Vancouver over the past few months, with a slight increase of 1 point to -29% for January. Calgary and Edmonton held steady at -37% and -35%, respectively, during the weeks between December and January. Vancouver showed the most consistent stabilization overall, varying only 1 to 2 points during the

prior 3 months. The data suggests that within the western Canadian markets, we saw less variance between consumer behaviours as a result of lower cases of COVID-19, more lenient public safety guidelines due to lower case-loads. This allowed consumers to return to a more normal day-to-day travel pattern.

PERCENTAGE OF TRAVEL BEHAVIOUR & NEW NUMBER OF CASES :

The information below highlights traffic patterns of those who *are* on the move in correlation to the new COVID-19 cases across Canada. The prior information in this report for Eastern & Western Canada highlighted the decline in movement.



The graph above illustrates concurrently the number of new COVID-19 cases in Canada and the % of travel behaviour from March 2020 to January 2021. The averaged travel behaviour that COMMB reported since the beginning of the pandemic across the 7 markets studied, and the reported COVID-19 cases per million, illustrate a clear correlation between increases in number of new cases and reduced travel behaviour. Shown in the early initial phase (March-April) a steep decline in the percentage of travel patterns due to newly implemented city and/or provincial restrictions. During the spring and summer months, as new cases dropped, travel began to resume to near-normal levels. This positive pattern is something to monitor in the coming months as we maneuver the remainder of this second wave of COVID-19 cases and altered travel behaviour.

In preparation for a potential third variant wave, and in support of the upcoming COMMB Media Suite launch later this year, COMMB is ramping-up its insights reporting in support for its members. The new insights

are scheduled to launch in Q2 with a solution that will provide increased persistency of information at a more granular level, allowing COMMB to provide delineation between outdoor and place-based, variance by road segmentation as well as product type. The solution includes sourcing three years of historical data (2019 baseline, 2020 major COVID-19 impact year, & ongoing throughout 2021), allowing COMMB to provide compelling insights to support OOH spends during the uncertain times. In addition, this data will assist COMMB and our members in making an informed decision about data insights as we approach the launch of the COMMB Media Suite and moving into 2022 and beyond.

The data contained in this report represents general travel behaviour activity and does not apply to specific OOH advertising locations, as travel patterns will vary based on road type within a market.

[Click Here](#) to view previous Travel Behaviour Reports.



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