

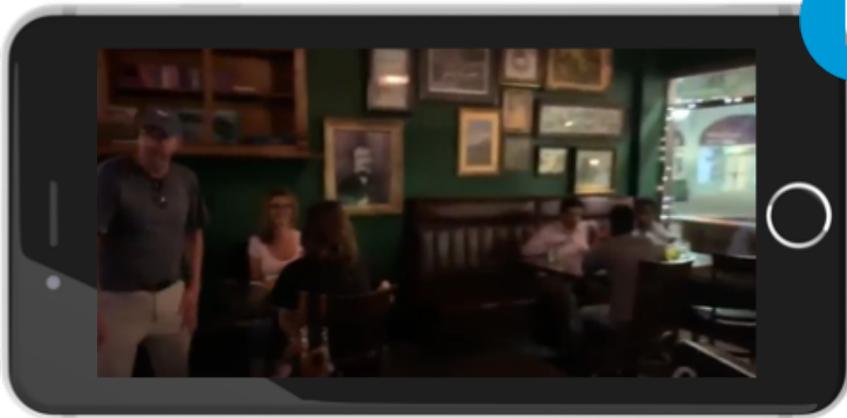


Monthly Restaurant Traffic Report

NATIONAL
August 1-31, 2020



IN RESTAURANTS



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Fat Badger, Regina

Canadians are enjoying the restaurant experience



Lure Lounge, Calgary



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Fiorellino, Montreal



Rogue Kitchen & Wet Bar, Vancouver

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Colony on Granville, Vancouver

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O'Hanlon's, Regina



Social Beer Haus, Calgary

AUGUST 2020 RESTAURANT AUDIENCE INSIGHTS OVERVIEW



UB Media commissioned independent third party mobile data reporting to provide in-depth analyses of the audiences at restaurants from March through August, 2020 in five key markets nationwide: British Columbia, Alberta, Saskatchewan, Ontario, and Quebec. Multiple reports provide detailed analyses including traffic, daytime/evening locations, demo (census), brand affinity, audience persona, and path to visit. Data was pulled using device IDs and GPS signals ethically sourced through mobile applications.

Alberta Executive Summary

Alberta traffic continued to trend better than August 2019, even though it showed a dip in traffic coming out of August 2020. With similar demographics month-over-month, peak visitation days were Tuesdays, Fridays and Saturdays, and peak visitation hours at lunch and dinner. As in July, most visitors lived/worked between 1-10 miles from the areas polygoned. Unlike 2019, visitors to the venues polygoned were three times more likely to visit grocery stores, animal care centers and quick-serve restaurants than the average person in the market. Visitors to venues in August continued to include those in the 'looking for love' category who used online dating apps for casual dating experiences. New to August were online shoppers who frequently used a variety of apps to search for a product or to price-compare. Rounding out the top five identified audience types were business travelers, fast foodies and the fitness-minded.

British Columbia Executive Summary

While BC eclipsed 2019 traffic trends in July, it saw a correction in August, dropping below last month's levels. As was the case in 2019, Friday was the highest traffic day of the week, with peak visitation hours at 1-3 pm, an interesting shift from 2019 which saw 4-8 pm as peak visitation hours. This may be reflective of the summer winding down and British Columbians preparing for the back-to-school/work seasons. As in July, visitors to the restaurants polygoned were over twice as likely to visit a gas station as the average resident in the market. Visitors were also over two and a half times more likely to visit a retail store, suggesting an increased level of confidence in the brick-and-mortar shopping experience. Demographics show 40% of visitors captured were parents, while over 60% chose a vehicle (car/truck, male/female average) as their main mode of transportation, suggesting visitors opted to drive versus taking transit. As in July, the top five audiences were business travelers, fast foodies, the fitness minded, online shoppers and fashionistas. The Royal Bank of Canada (RBC), Walmart, and Wyndham Hotels remained the top points of interest to visit before or after visiting a restaurant. The Home Depot snuck ahead of Shoppers Drug Mart in the top five ranking as one of the most frequented points of interest before or after visiting a dining establishment. This may suggest that British Columbians are engaging in the 2020 national home improvement trend as Canadians navigate through the pandemic.

Saskatchewan Executive Summary

With the retail sector, personal services and markets open again, Saskatchewan benefited from strong traffic trends in August, and continued to surpass those of 2019. Thursday through Saturday were the highest visitation days, with Thursday showing a 3% increase in visits when compared to July, and peak visitation hours at 5-7 p.m. Visitors to restaurants were over ten times more likely to visit a liquor store than the average resident in the market. The highest percentage of visitors lived/worked 1-2 miles away from the areas polygoned. Over 50% of visitors were parents and over 75% used a vehicle (male/female average) as their main mode of transportation. Demographics show over 30% with an annual household income of over \$100,000. Quick-serve restaurants, liquor stores, gas stations and retail stores, were among the top establishments visited before or after visiting a restaurant. Rounding out the top five audience types who visited the restaurants were bargain hunters, fast foodies, pet owners, online shoppers, and young adults looking to date.

AUGUST 2020 RESTAURANT AUDIENCE INSIGHTS OVERVIEW



Ontario Executive Summary

Coming out of August, Ontario demonstrated consistent traffic trends, surpassing those of August 2019. With similar demographics in August as compared to July, Friday through Monday were the highest visitation days. While 2019 showed a defined peak at the dinner hour, 2020 is showing an overall increase trend from 12-9 pm, perhaps due to more flexible work schedules amid the pandemic. Another indication of COVID realities was evidenced by the distance from home/work to the venues measured: the largest percentage live/work 1-25 miles from the venues measured versus up to 100 miles in 2019. This may suggest that visitors to the venues polygoned may have preferred to dine locally vs travelling. Visitors to the restaurants polygoned were twice as likely to visit a recreational area and almost twice as likely to visit a liquor store as the average resident in the market. This contrasts with 2019 when visitors were almost three times as likely to visit a casual dining establishment, and twice as likely to visit a furniture store as the average resident in the market. Grocery stores, liquor stores, and coffee shops remain the most popular points of interest before or after visiting a restaurant. Similar to July, the restaurants polygoned attracted business travelers, fast foodies, pet owners, online shoppers and the fitness minded.

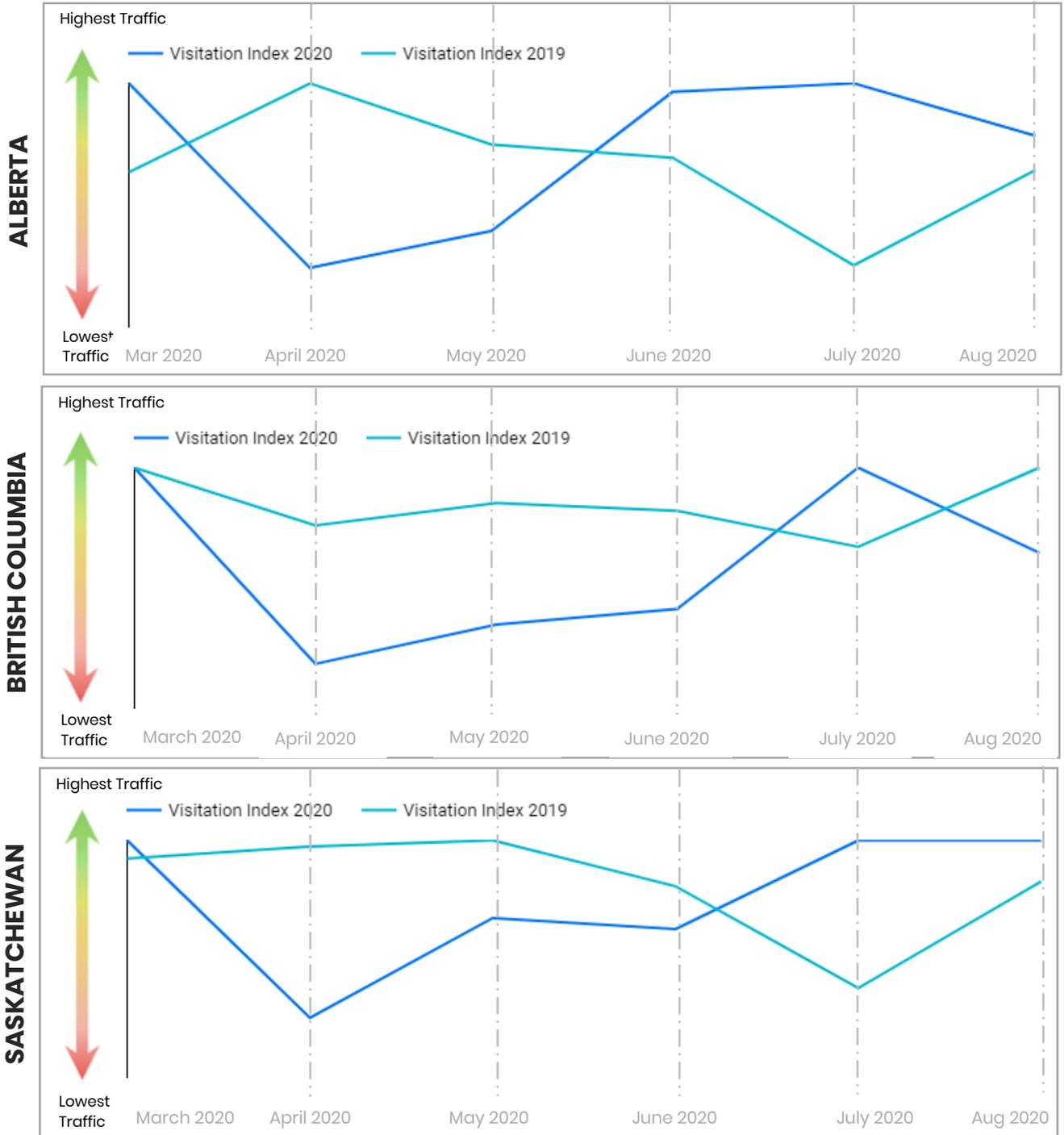
Quebec Executive Summary

Of all the national markets measured, Quebec demonstrated the strongest traffic trends coming out of August, meeting best pre-COVID traffic levels (March 2020) and continuing its upward trajectory in line with 2019 trends. As in previous months this year, most visitors lived/worked within 10 miles of the venues polygoned. Over 60% of the audience chose driving as their main mode of commuting, while 29% chose public transit. Demographics show over 50% of the audience were females, and 43% were parents. A distinct behavioural change was noted in visitors to restaurants when comparing similar time frames from 2019 to 2020: in 2019 Michael Kors, Banana Republic and Éconofitness were the top three points of interest visited before or after dining at a restaurant. In 2020 that shifted to The Royal Bank of Canada (RBC), The Home Depot, and Tourism Canada (parks and recreation). The latter two locations are potentially reflective of the current national trends: 'staycationing' inside Canada and engaging in home improvements. Visitors to restaurants in August were over twice as likely to visit restaurants as the average resident in the market. Rounding out the top audience types were business travelers, fast foodies and sports junkies, along with the July influx of online shoppers and pet owners continuing.

Traffic Trends by Market



This report evaluates the growth in foot traffic to restaurants from March to the end of August, 2020 in British Columbia, Alberta, and Saskatchewan, and also compares 2019 to 2020 traffic.



Traffic Trends by Market



This report evaluates the growth in foot traffic to venues from March to the end of August, 2020 in Ontario and Quebec and also compares 2019 to 2020 traffic.

