

**INSIGHTS REPORT**



# **IMPACT, GROWTH & CHANGE IN OOH**

**October 2022**

# Executive Summary

COMMB's latest Insights Report focuses on the ever-changing environment post pandemic with special attention on the consumer behaviours that affect marketing strategy and make the out-of-home segment an influential component. As expected, with COVID-19 under control, thanks to an 82%-plus [vaccination rate](#), the government has steadily eased restrictions on citizens and visitors to the country as positive tests have declined. The final COVID-related mandate - requiring airlines to verify vaccination status of foreign travellers or for air and rail passengers to wear masks - was [lifted on October 1](#).

Canadians continued to work and save throughout the pandemic, but now that restrictions on travel and assembly have ended spending is once again a priority for Canadians. 2022 has been referenced as the new, 'roaring 20s' as mass consumerism skyrockets. Research from [Numerator](#) indicates that while Canadians do not believe we will eradicate COVID-19 they do not feel it will exert undue financial hardships or hinder their ability to enjoy their lives. Still, how, and how well the nation recovers from the pandemic will determine optimal strategies for the out-of-home marketing industry and may well establish Canada's economic future. The demand for recreation and entertainment are leading the charge, with spending 40% higher compared to pre-pandemic, [according to TD Economics](#). A strong job market mitigates any lingering unease, and disposable income bolstered by many months of isolation with no opportunity for recreational spending has led to Canadians selling out events, and venues are surpassing attendance records – making it inevitable that people are outside of their homes and ready to spend. Aside from spending, travelling and experiencing, Canadians are also ready to get back to gathering with family and friends with [67% of Canadians planning to spend Thanksgiving with their loved ones](#). Canadians are headed back to a new sense of normal, and it's important advertisers understand this. The COMMB Insights Report consists of crafted first-

party data with reputable market research partners, and compiled impactful third-party data to support this new environment for Canadians. Challenges such as inflation and supply chain constraint linger, however the trends highlighted in this report clearly point to a need for marketers to respond nimbly and quickly to take advantage of shifting consumer and business opportunities as the country gets moving - and buying - again.



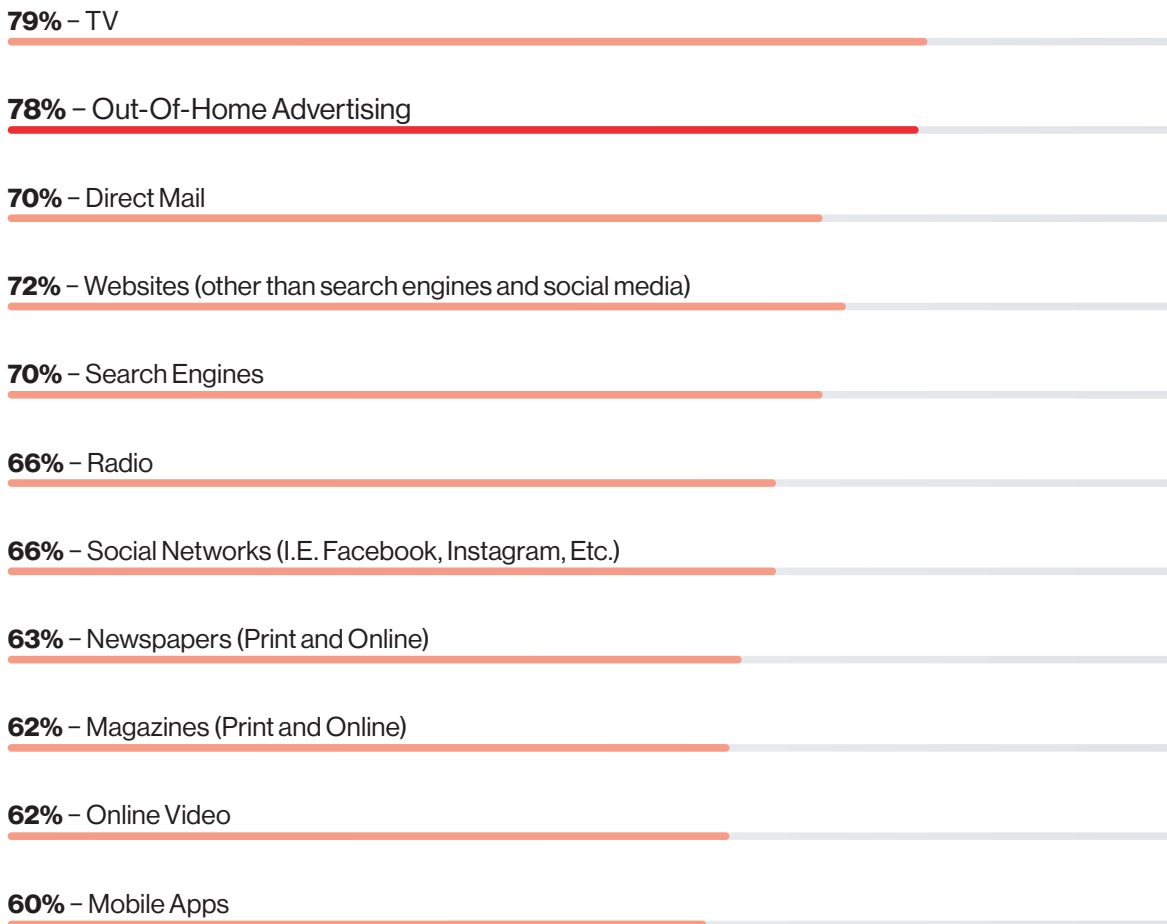
**Amanda Dorenberg**  
President, **COMMB**



## COMMB is launching The Media Spectator Review (The MSR) in 2022 – here’s a sneak peek

COMMB is excited to introduce an annual report of consolidated first-party research. As leaders in outdoor advertising and the place-based space, COMMB is dedicated to providing dynamic research insights that fuel marketers and brands to reach success. The Media Spectator Review includes studies focused on audiences that are exposed to media, with a primary focus on outdoor for our inaugural issue, as well as outdoor and place-based in combination with other media formats moving forward. COMMB members will have the benefit of reviewing a single document with insights on the industry, allowing for effective plug-and-play takeaways. This document is set to launch early November, 2022, however, we are providing early access via our Insights Report for a sneak peek on the exciting findings from this year.

### Canadians Pay Attention To Out-Of-Home Advertising



## Canadians **Take Action** After Seeing An Ooh Ad

“Upon Seeing an OOH ad, I...”

Base; 2022 (n=1267), 2019: (n=2263)



**37%**

Became aware of a product, service, or sale



**26%**

Went online to search for more information on a product or service



**22%**

Considered an advertised product or service



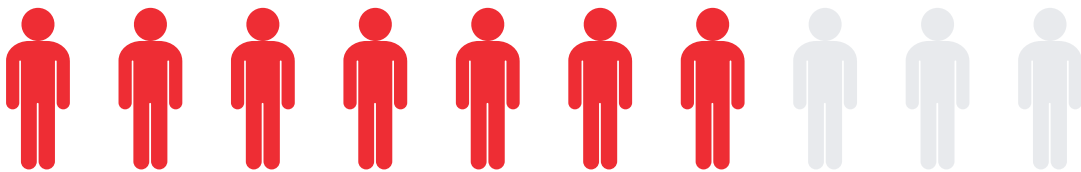
**17%**

Visited a store in person or online



**16%**

Looked for more information on a product or service offline



**7 in 10 Canadian shoppers** admit to **taking action** upon seeing an OOH ad

The objective of COMMB’s MSR is to understand the Canadian audience and how consumers are truly integrating back into normalcy, their media and advertising consumption and patterns amongst other compelling insights for our beloved OOH industry. COMMB partnered with leading market research firms and gathered powerful survey based data to uncover Canadians habits over the summer months.

COMMB and **Leger**, the largest Canadian-owned market research company, crafted a survey to better understand Canadians today. Overall results showed a very positive sentiment from Canadians with 79% using their personal vehicles for their daily activities and 75% visiting their place of work at least once a week! 86% engaging with others outside the home and 82% reported eating out at any kind of restaurant. This study was also presented to media planning and buying personnel to understand the variant between the general consumer and the media industry, an impressive 95% of media personnel surveyed reported that the information

presented changed their perception of how Canadians are moving about their daily activities, and 50% indicated that the results will affect their media planning and buying considerations to include OOH on more plans.

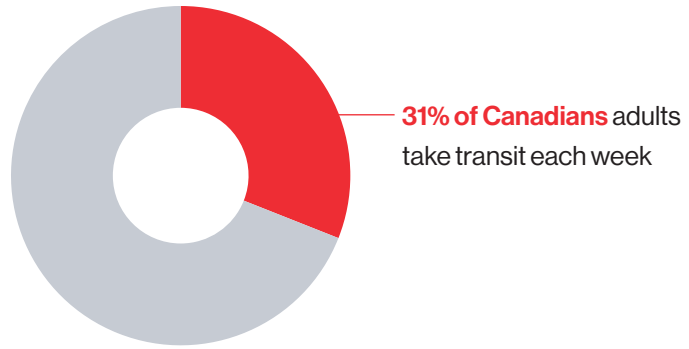
MasterCard's most recent **SpendingPulse** reinforces these findings and offers an explanation for this out-of-home activity. "In the beginning of the pandemic everybody was at home. They were buying athleisure, sports, sweatpants, and fixing up their houses," said Steve Sadove, MasterCard senior advisor and former Saks CEO. "[I]n a post-pandemic environment, they want to change their behaviour and get out, they want to go to parties, they want to go to social occasions."

## **Keep your eyes out** for our **Media Spectator Review** for the full findings from the **COMMB/Leger** report.

Another exciting project which COMMB has been actively launching for over a decade is the Brand Spark Shoppers Study, enhancing the survey questions annually to better understand the consumer trends. For the 2022 edition, COMMB breaks down details from the survey within the VECTOM+H&QC markets: Vancouver, Edmonton, Calgary, Toronto, Ottawa, Montreal, Halifax and Quebec City, with a summary of Canada as a whole as well. The Shopper Study provided insights on the recall and efficacy of various outdoor media, details on transit habits and place-based venue visitations as well as their sentiment towards out-of-home audiences. Here are some takeaways from the study which best represent the overall positive findings.



Almost 1 in 2 in the largest 3 markets take **transit each week**, as do a majority of Canadians 18-34



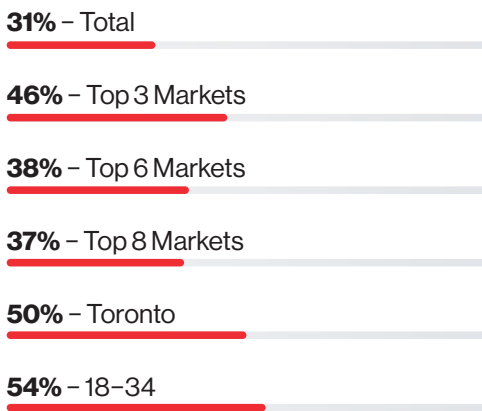
### Transportation used in single trips – Past 7 days

Base; (n=2126)

#### Net Transit Use (Past Week)

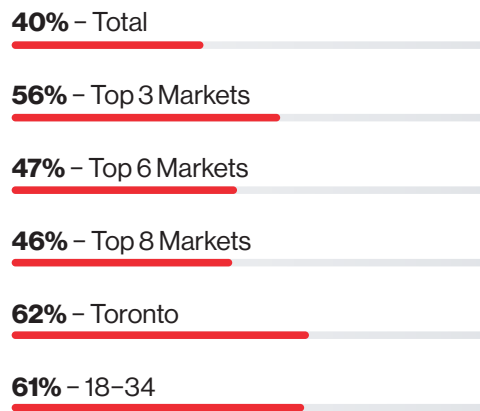
##### Among **all** Shoppers:

Rode at least one of local bus, streetcar, LRT, train, or subway



##### Among those who **recall OOH**:

Rode at least one of local bus, streetcar, LRT, train, or subway



With more Canadian consumers taking to air, rail, and vehicular travel, naturally they are spending less time consuming streaming services, watching television or browsing online. As a result of the increased movement outside of one's home, and the inherent need to focus on one's surroundings while commuting, OOH is seeing a resurgence of brand affinity in the race for consumer attention. Billboards, street furniture, and kiosks, truckside and taxi-top advertising are sparking engagement, while digital out-of-home (DOOH) continues its rise in the media mix, with some agencies and brands moving DOOH from the OOH bucket into digital display. AdQuick recently released a report debunking myths and misconceptions about OOH advertising, citing that while advertisers may recall OOH's history as a difficult medium to manage and buy, modern technology has ushered in a new era of outdoor advertising - across both traditional media formats and digital out-of-home.

# 2022 Trends

## Record-Breaking Attendances

In-person events and festivals are seeing an influx of attendance; this is likely due to Canadians shift in their priorities post pandemic. According to Bizzabo, nearly half of all events and conferences on its platform in the second quarter of 2022 were in-person gatherings. That's a threefold increase over the last quarter of 2021. Even more events through the rest of the year will be conducted through total or partial physical attendance.

The infamous Calgary Stampede saw a triumphant return to a jam-packed stadium with its 10-day rodeo commanding an **attendance of 300,000 people on the first day**, a bucking good turnout we'd say. The total attendance was expected to top 1.2 million guests, which is right in line with both 2018 and 2019 numbers, with nearly 30% of attendees joining from outside of Calgary. The stampede always draws an impressive crowd of tourists, however this year was even more impactful as we embrace our normal existence within the community and tourists clamour out and about, exploring the city of Calgary outside of stampede events - and taking in the out-of-home assets along the way.

“There’s nothing better. The Stampede is Calgary, and vice versa. **People need it and are ready to celebrate and come together again.**”

Kristen Anderson, Stampede Communications Manager





The surrounding businesses in Calgary which help support hospitality for visitors also saw an increase, with 90% occupancy rate during the Stampede. Steve McDonough, president and chairman of the Stampede board, said “I think it’s fair to say Stampede in Calgary is back in the saddle.”

Encapsulating everything that signifies the end of the summer season, from coast to coast, **Toronto’s CNE** (Canadian National Exhibition) & Vancouver’s PNE (Pacific National Exhibition) both saw unprecedented attendance numbers. The CNE with an attendance of over 1.5 million people coming for the midway, concerts and especially the food and PNE, BC’s largest ticketed event, with an **attendance goal 525,000**, the event drew crowds nearing the 530k mark, offering something new this year with its ‘Canoe Culture’ exhibit which celebrated indigenous art and culture.



“We’re looking at other fairs this year, more people have come out. But also, the per-person spending is way up. It says to me that **people are ready to return back to normal**, even though there are still risks out there. **They want to socialize and they want to be together with family and friends,**” so that’s a good sign.”

Darrell Brown, CEO, Canadian National Exhibition

Smaller, but nonetheless heavily attended were various other events including the Borden Air Show. Record numbers turned out for the 2022 Canadian Armed Forces Day and Airshow, with an **attendance of 54,000**, a 20% increase over its previous peak attendance in 2016.

Western Canada's multicultural event, Surrey Fusion Festival, is a two-day celebration that includes an array of activities, such as 8 stages, 30 cultural food pavilions, amusement rides and more. This event saw its **highest attendance to-date in 15 years** this year.

Fiction and pop culture fan convention Fan Expo Canada saw thousands of comic, anime and cosplayers returning for the first time without any restrictions. With cast members from Lord of the Rings, The Boys, Stranger Things, and Sons of Anarchy (among many others) making appearances, a **record breaking crowd of over 140,000 people** attended the event.

Canada's sports fanatics also made the extra effort to show their pride and support their teams. This summer marked the return of the Honda Indy in Toronto after two years of cancellations. An estimated **50,000 fans turned out for the three-day race**.

**“It looked like they needed more grandstands. It shows we should be running **more races here in Canada.**”**

**Scott Dixon**, 6-time IndyCar series Champion, 2022 Honda Indy Champion.

This year also saw the Formula 1 Grand Prix return to Montreal for the first time since 2019. A whopping 338,000 fans attended the race at Circuit Gilles Villeneuve, **eclipsing the 2019 attendance of 307,000**, an indication that Montrealers are eager to engage. The 2022 National Bank Open returned with a vengeance setting an attendance record totalling 237,158 spectators and 1,400 volunteers over the course of the 10-day event. An **increase of 12,000 over the previous record set in 2019**.



Overall, Canadian event planners and organizers are seeing positive attendance rates, in many cases record breaking attendance. Perhaps an interesting correlation to the desire to re-engage with friends and family in social settings, CBC cited that **many report their percentage of savings increasing over the pandemic**. Knowing this trend, combined with the desire of recreation and entertainment being a priority for Canadians, we can surmise that people will utilize some accumulated savings to fill this need. It's an excellent opportunity for the entertainment industry to ramp up advertising for their in-person events. Below are some events that met recorded attendance levels, surpassed expected numbers, proving entertainment is a relevant industry category and is on the uprise.

# The Return of Live Music

Summer is the most anticipated season of the year for many Canadians, likely more so this year than ever. With summer weather ideal for getting outside to enjoy one's favourite summer activities, most of Canada saw near-normal or **above-normal temperatures**, a welcome statistic for many of us warm weather seekers. The positive weather forecast encouraged concert goers to flock to venues to enjoy the return of their beloved bands and artists. LiveNation Entertainment, one of the world's largest live entertainment companies composed of global market leaders such as Ticketmaster and Live Nation Concerts, released their **Q2 report** and it contained some incredible insights. One thing is for certain, artists are eager to return to their favourite venues, international tours and share their voice with the world again, and the fans are certainly showing their appreciation:

100,000,000



100 million tickets sold globally for 2022 concerts by the end of Q2 (which already surpasses the total for all of 2019)



Concert bookings  
**up 30%** vs Q2 2019

**+30%**



Average revenue per fan  
**up 20%** vs 2019

**+20%**

Major artists showed up all over Canada drawing massive crowds and extensive wait lists for resale tickets, including names like Greta Van Fleet, Rammstein, Harry Styles, and The Red Hot Chili Peppers. These artists filled the big venues in the major markets, with 43,000 excited **Rammstein fans in Montreal**, and **Harry Styles in Toronto** completely selling out within minutes of ticket sales going live.



Major stadium and amphitheatre venues were not alone in this trend, there was a resurgence in the music festival scene as well. Ottawa BluesFest audiences were consistent with past years, with at least **20,000 people showing up each night** over the 10-day festival and the Boots & Hearts Music Festival had a strong showing drawing a crowd that **averaged 40,000+**. The show this year was headlined by icon Shania Twain who gave the fans a concert to remember. Osheaga drew 120,000 fans out in Montreal, matching the 2019 attendance. The main difference is that this year, **50% of the crowd were from Quebec**, whereas in the past around 65% were from out-of-province, perhaps indicative of uncertainty on the rules of Canadian travel - which hopefully as of Oct. 1st with all restrictions being removed will no longer be an issue.



# Canadians are Travelling

Travel has been a hot topic over the past years, but reports have shown that Canadians are keener than ever on exploring Canada. This is a trend that we noticed in 2021 when domestic flights became available again - Canadians leapt at the opportunity to leave their home province for a vacation. In summer 2022, that pattern continued. Year over year, **Kayak.ca saw a 50% increase** in total flight searches in Canada (international & domestic), taking us right back up to pre-pandemic levels.

But, where do Canadians want to travel, and who primarily does? **According to Comscore**, women 25-34 are the most inclined to hop on a plane. **60% of Canadians are thinking about, planning, or have booked travel this year**. Google Flights data shows that domestic flight searches have exceeded 2019 levels, with Vancouver, Calgary, and Toronto being the top-searched destinations. International flight searches have hovered around pre-pandemic levels, with people predominantly searching for London, New York, and Paris. **StatsCan's June 2022** data reported that Canadians returned from nearly 2.6 million trips, which is 587% higher than June 2021. There were also nearly 2.2 million trips to Canada from abroad, which is 13 times more than in June 2021.

This travel recovery is also reflected in Canadian Airlines, for example, **Air Canada's passenger revenues** from the 2nd Quarter of 2022 increased about eight times when compared to the 2nd Quarter of 2021. Air Transat's planned capacity for summer 2022 **represents ~90% of 2019 capacity levels**, whereas **WestJet is returning 94% of its pre-pandemic network** for summer 2022.

Looking from the outside in, Google flight searches have reflected the travel desires to Canada as well. Global searches for travelling to Canada increased by 100%. Canada's natural and man-made tourist attractions are big draws, with Canada's Wonderland, Niagara Falls, Ripley's Aquarium of Canada, Lake Louise, and Banff National Park rounding out the top 5 searches.

Not only is air travel seeing this positive turnaround, the cruise industry is also reporting optimistic data for 2022. Nearly **80% of travelers who have cruised before say they will cruise again** – the same percentage as before the pandemic. They forecast that passenger volume is expected to recover 101% of 2019 levels by the end of 2022 - an overall exciting resurgence of the cruise industry.



An excellent example of cruise recovery in Canada is that there are **30 ships expected to grace St. John's shore in 2022**, bringing about 37,000 passengers with them; marking a more buoyant cruise season than before the pandemic!

Finally, we are also seeing our friends south of the border return for visits, with US-residents arriving by automobile. **Over 1.2 million trips have been recovered in July 2022** so far, which is almost 10 times more trips that were taken in July 2021, and well over half (56.6%) of the 2.2 million US-resident arrivals by automobile during the same month in 2019. Canadians also are getting back behind the wheel. A **MasterCard study** found that this vacation season drivers spend 28% more year-over-year and 40.4% more than before the pandemic. Higher gas prices are partly to blame, but it is clear that Canadians are driving more and driving farther - mostly for domestic pleasure trips.

Whether Canadians are taking to air, or water, we are seeing an exponential increase in travel plans across the country for 2022 and travelling to new destinations, as we know, takes time and planning. It doesn't just start on the flight itself, providing an optimal opportunity for brands and advertisers to get in front of their consumers before they book their tickets! Canadian travellers have multiple exposure points along their journey for noticing out-of-home and place-based advertising. From their car-share ride on major highways, to their journey throughout the airport - the possibilities for ad exposure are endless and what an optimal time to be preparing for the upcoming holiday season travels. In the COMMB Media Spectator Review, survey results showed that 39% of Canadians spent at least 3 hours at the airport. Longer lines and longer wait times means more potential for ad exposure! Knowing Canadians are travelling at pre-pandemic levels, or exceeding them, is a significantly positive piece of knowledge for the outdoor industry.





# Nothing Beats In-Person

The place-based space saw an influx in traffic to their venues in 2022. From a retail perspective, nearly 9 in 10 said they will be buying more at brick-and-mortar locations. Shopping in-store is back, and it's thriving. People are more prone to shop in-store because they are craving in-person experiences and wanting to get away from their computers and out of their homes. This is an impactful insight. The desire to be out and about is surpassing the convenience of e-commerce for the retail shopper. Physical in-person experiences have been the trend for 2022 despite the increased push by e-commerce brands. People want to be tactile - they enjoy trying on clothes and making shopping a social event, being out with friends and family and simply socializing again. Canadians are shopping in-person, and they're also taking action when they are exposed to outdoor advertising. 7 in 10 shoppers admit to taking action upon seeing an OOH ad, an insight found from COMMB's MSR. Understanding what shopping habits Canadians have is one thing, but knowing that they are taking action when out and about is an undeniably exciting piece of evidence for the OOH industry.

Canadians were binge watching their favourite shows and learning how to balance at home and work responsibilities - under one roof - throughout the pandemic years, but now they are craving the in-person cinematic experience. Households are expected to continue viewing the movie-going experience as a worthwhile, inexpensive means of out-of-home entertainment with Top Gun: Maverick being a domestic record for Tom Cruise besting his top grossing film worldwide, Mission: Impossible – Fallout.

Other indoor entertainment activities are seeing an influx as well. Within COMMB's MSR, we uncovered that 71% of Canadians engaged in an indoor entertainment activity in the past month - including concerts, restaurants, bars and malls. Nothing beats in-person!



**85% of Canadians** left home to run errands at least **once a week**

With all of this exciting activity during Q2 and over the summer, it's no surprise that the topic of 'back to work' is on the uprise in news articles and conversation. The latest from a new [Ipsos poll](#), found three quarters of Canadian workers have returned to their original workplace. [Royal Bank of Canada](#) and [Bank of Nova Scotia](#) have both requested staff return to the office in the coming months. With many employers expected to follow the lead of [JP Morgan](#) and other leading investment banks that have deemed remote employment unsustainable, there soon could be substantially more Canadians lingering in skyscraper lobbies, riding elevators, and gathering in common areas, where they can engage with print and digital signage. Some workplaces are returning to a 'hybrid' model with some days in the office, and some at home. This does not mean individuals are not leaving their homes during the day. In fact, **85% of Canadians left home to run errands at least once a week**, another MSR statistic. Although some workplaces might continue remote working models, people are still out and about whether that's during their lunch break, running a quick errand, or picking up their kids from school. Working from home does not mean Canadians are inside all day - it means Canadians have the freedom with more flexible schedules - giving opportunities for more ad exposure points during the day. The return of consumers' daily routines bodes well for place-based OOH. While curbside pickup may remain popular, a significant number of grocery, fashion, and homeware shoppers enjoy the in-store experience. With no restrictions, they are now free to indulge their browsing, and a big part of that experience includes engaging with in-store advertising and video signage. Likewise, fitness studios are now operating at full speed, putting captive audiences in front of video screens where they consume not only entertainment but also marketing messages.

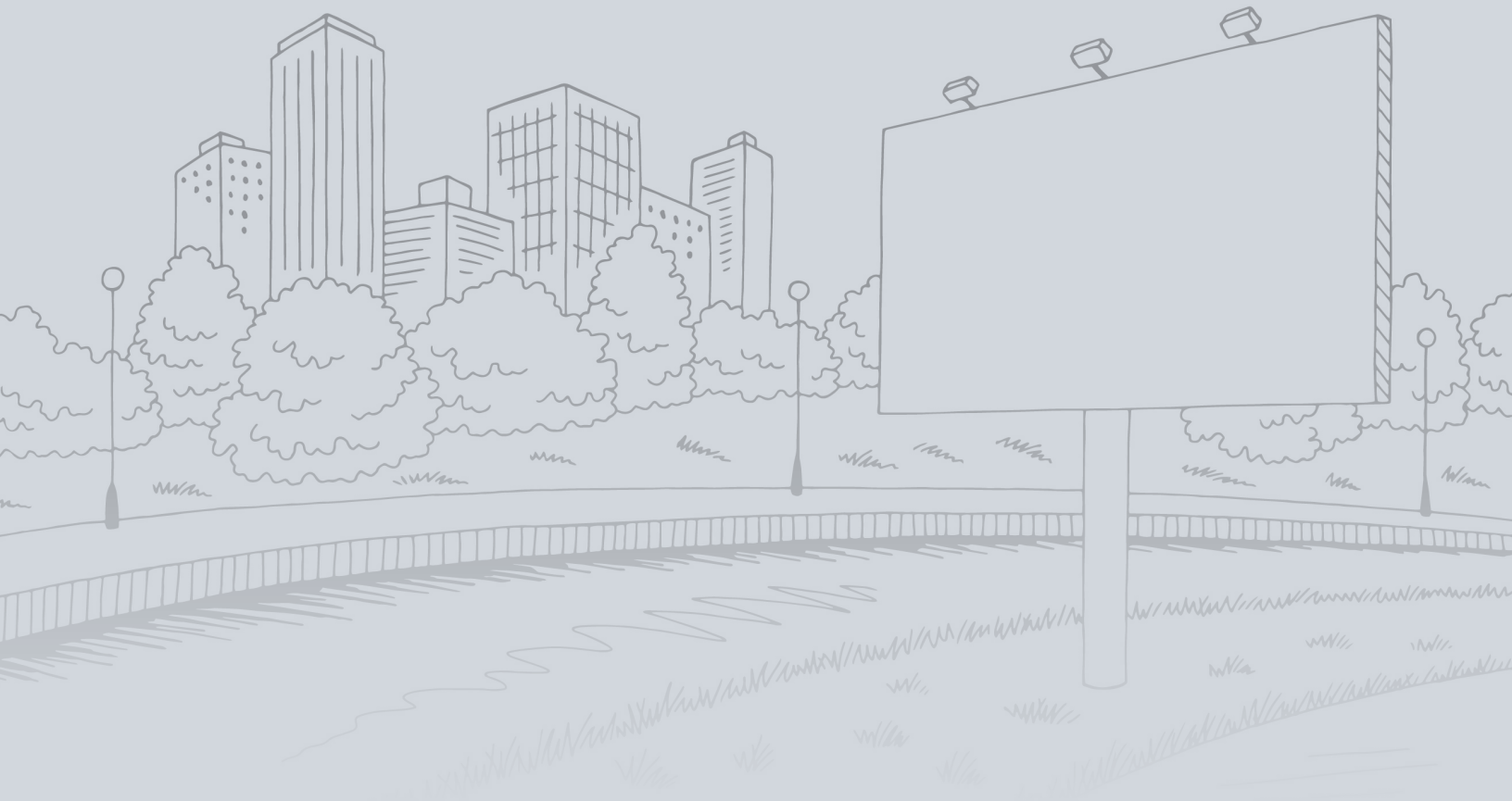
# 2022 is a year to remember.

2022 has given us an exciting uprise of encouraging data post-pandemic. We are understanding this new normal and lay of the land, as consumers shift their desires and priorities to focus on the pleasures of life. This type of audience makes for an exciting target - one that is ready to spend, looking for indulgences and on-the-go whether that's to run a quick errand or to embark on a vacation destination. We can forecast that these trends will continue into Q4 with the holidays quickly approaching. Canadians are no longer in a lockdown period. With restrictions lifted for the first time in two years during this period, Canadians will have the ability to enjoy their holiday season in a different light. COMMB will continue to watch the holiday trends unfold in Q4, and continue to report on insights for the industry.

## Special thanks for contributions to:

Amanda Dorenberg  
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# Thank You!



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