

INSIGHTS REPORT



ISSUE # 4:

# IMPACT, GROWTH & CHANGE IN OOH

Q3 2021

# President's Note



**Amanda Dorenberg**  
President, COMMB

Summer and early fall both were full of events for the OOH industry and for COMMB. Changes and upgrades have extended the interim since our last report, and I wanted to thank you all for your patience. We believe the wait will be worthwhile as we worked through a reevaluation of our COMMB Insights to enhance the reporting output and include our valued place-based members.

Beginning with this edition, the report now will include an enhanced baseline comparison representing a median average of the 26+ months pre-COVID, as compared to the reported period in 2021, allowing us to represent the trends in consumer movement more accurately. The details within this issue of COMMB Insights break into two key sections. The first highlights the trends as seen in major outdoor markets across the country and within specific product groups, illustrating some key findings and introducing new anecdotal research in addition to the COMMB proprietary research. The second represents the performance of place-based venues in five major markets across the country since the bulk of restrictions were removed effective July 30. It was important for COMMB to take the time to assess, evaluate, and include these details for our Q3 comparison.

We are excited to share this compelling issue of COMMB Insights, as many businesses, including our members, have adopted a hybrid back-to-work strategy, seeing employees and team members back in the office for the first time in many months. The country added 157,000 full-time jobs in September, bringing the rate back to pre-pandemic levels. People are welcoming the return of music festivals, sporting events, movie premieres and the upcoming holiday season with open arms and warm hearts, bringing friends, family, and colleagues back together, in-person, again.

I know I've certainly felt a sigh of relief being able to collaborate with our beloved OOH industry, host in-person meetings, and make new industry friends, and it seems the insights and results within this issue of COMMB Insights represent that I am not alone in this sentiment as consumers are on-the-move again.

# Outdoor Results

COMMB, in collaboration with Spotzi, presents in this update a new approach for assessing market metrics in the context of COVID-19. The reference baseline is now reflective of more than 26 months of pre-COVID data, providing users with a more comparative baseline and a view of trends within 2021 to monitor continued progress towards "normality". At the time of the last update, July 2021, many provinces were continuing their pace towards reopening phases. In this update, we present data for Q3, providing a view to assess how things have changed from the beginning of summer through the present.

A number of developments have marked the continuing march towards a reopening of the Canadian economy; these include easing of various restrictions across Canada (Ontario plans to lift all remaining measures, including proof of vaccination and indoor mask requirements by March 2022) and the reopening of the border in August to fully vaccinated U.S. citizens. The graph below indicates this continued movement and outdoor activity within the "opportunity to see" (OTS) viewsheds. A deeper dive into changes between Q2 and Q3, 2021 indicates continued mobility among areas across Canada, particularly in Quebec and Halifax, increasing by 24 points and 22 points in Quebec City/Ottawa-Gatineau (QC) and Halifax, respectively.

The increased car-travel kilometres indicate more leisure travel and more commuters back on the road in their hybrid return to work environments. Hospitality, entertainment, personal service, and retail marketers should consider increasing their investment in OOH to take advantage of these trends.

This is especially true given the encouraging employment news cited above and Canada's still-record-low interest rates, which could spur businesses to expand to accommodate Canadians' growing appetite to travel, mingle, and spend.

In fact, [Dentsu predicts](#) Canada, at 5.9 percent, will enjoy the world's fifth-largest increase in advertising spend in 2022. The increase in mobility has come about in no small part to the valiant efforts within Canada to distribute vaccines to the population. Currently approximately 74 percent of the Canadian population is fully vaccinated. Canada currently ranks 10th worldwide for the percent of its population with at least one dose: 78 percent.

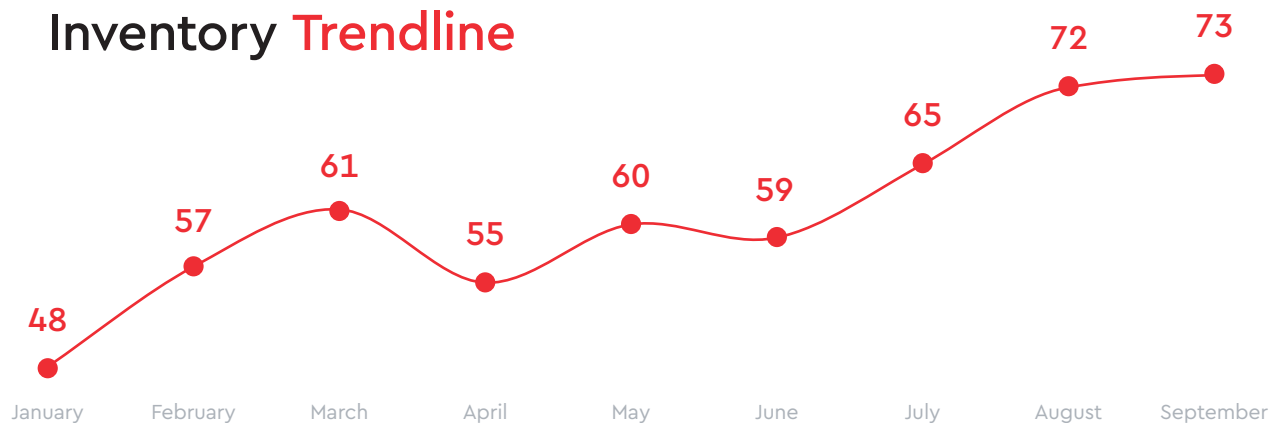
# Canadian Market Overview

Issue #3 of COMMB Insights contained information and results up to July 31, 2021, and saw many provinces move into Stage 3 of the reopening plans. This issue contains both August and September 2021 data as we examine the evolution of consumer movements over the course of Q2 and the summer months and moving into the early fall.

As mentioned in our last issue, July was a turning point for Canadians, and we anticipated increased movements throughout the months of August and September, between the easing restrictions, the reopening of the land-entry border between the United States and Canada to fully vaccinated U.S. citizens, and the September 7 opening to all fully vaccinated foreign travellers, all signs point towards a continued upward trend as we begin to see more local, national, and international travel, illustrated by the upward trend line as we examine the full calendar year results of 2021 movements.



## 2021 Canadian Outdoor Inventory Trendline



As we break this out into market growth between Q2 and Q3, 2021, almost all markets observed double-digit point growth between the percentage of consumer movements within opportunity to see out-of-home assets, including, as mentioned above, an impressive 24-point increase from Q2 to Q3, 2021 in Ottawa-Gatineau (QC) and Quebec City, with Halifax jumping 22 points. Not far behind in growth point increase, Ottawa-Gatineau (ON) saw 13 points, Toronto 12 points, Calgary 11 points, and Montreal 10 point increases, respectively.

## Market Overview – Outdoor

Activity Index vs Pre-COVID | % Growth from Q2 to Q3

Calgary	+11
Edmonton	+9
Halifax	+22
Montreal	+10
Ottawa-Gatineau (ON)	+13
Ottawa-Gatineau (QC)	+24
Quebec City	+24
Toronto	+12
Vancouver	+8

With Edmonton's historically strong performance and high indices as compared to baseline movements, it's not surprising that they saw a more modest point increase between Q2 and Q3, 2021, at 9 points. Vancouver trended relatively slower in its return to normalcy, with implications as a major international travel hub potentially being a driving force in its more modest recovery speeds. However, it did see an 8 point increase in movements between Q2 and Q3, 2021. Canadians certainly took advantage of the reopening of amenities and activities across the country. A contributing force in Canadians' comfort to re-enter their offices, gyms, favourite restaurants, and other social circles has been the push for vaccinations across the country, with more than 28M people (~74 percent of the Canadian population) being fully vaccinated.

# Western & Central Canada Update

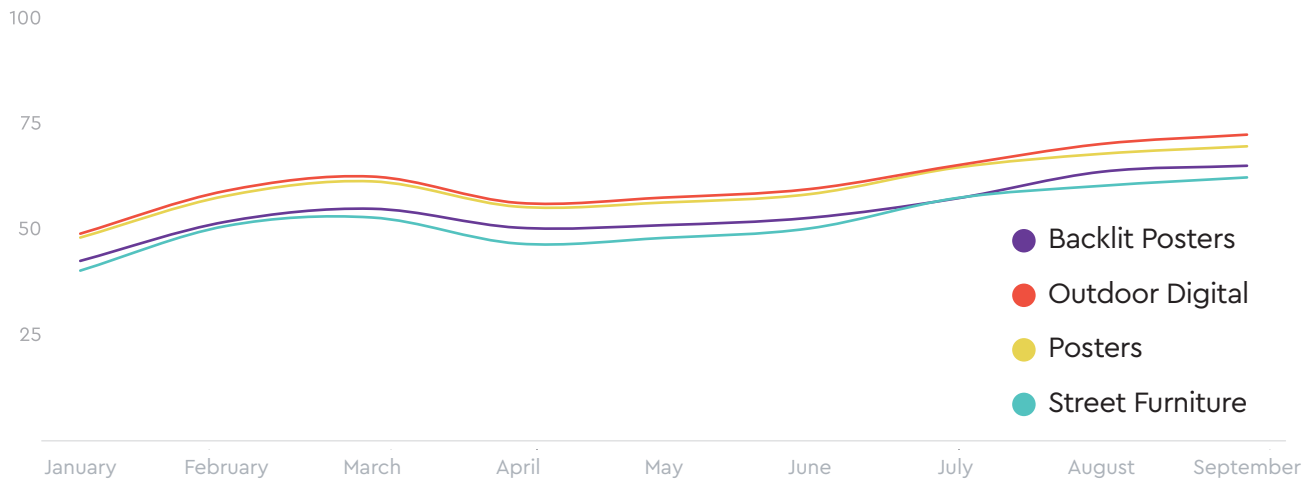
## Alberta

Alberta has experienced a mixed bag of pandemic-related issues in late summer. On the one hand, the province and its two largest markets, Calgary, and Edmonton, have taken more aggressive steps to reopen commerce and attractions. As a side effect, however, the region has undergone a fourth wave of COVID cases. At its September peak, the province experienced more than 1,600 new cases per day resulting in more than 1,130 daily hospitalizations, according to the Calgary Herald. Fortunately, CTV says modellers apprising the current situation indicate that there has been a significant reversal in growth in hospital admissions since implementing renewed caution and public health measures on September 15. This is welcome news as students return to school, and we move towards the cusp of the holiday shopping season.

Overall movement towards normalcy continues its trend in both Calgary and Edmonton, with the mobility index increasing 11 and 9 points respectively between

## Calgary Product Groups

Activity Index | 2021 vs. Pre-COVID



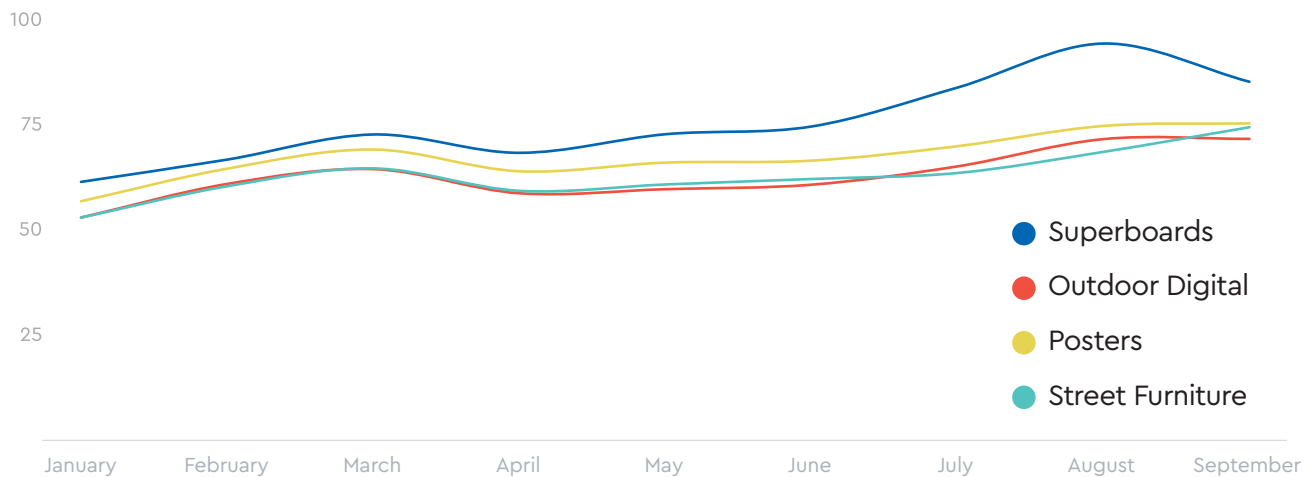
Q2 and Q3, 2021. Q3 has witnessed substantial growth in mobility in Alberta despite the recent COVID resurgence. According to the [Alberta Tourism Market Monitor](#) for October 2021, published by the Alberta Government, Q3 has been a rewarding season for the province despite the surge in COVID-19 cases, seeing year-over-year historical sites and museum attendance up +86.5 percent in August. Additional insights showcased that National Parks attendance was up +7.9 percent in September as compared to year-over-year and highway traffic counts in July were also up +7.9 percent year-over-year, with a variety of other mobility-related indicators also up in August. Time will tell whether or not the fourth wave of cases has had a more significant effect, though all indications are that health measures have had an impact and should temper any longer-term effects.

It's encouraging to note the gains for OOH use have been consistent across the board, with the trend lines for each media type running roughly parallel. As the graph shows, Calgary's street furniture has gained slightly on the other forms. Likewise, Edmonton's superboards took a noticeable leap in July and August. Of course, these cities couldn't fully sustain such huge gains, but the medium continues to lead the way at the end of the quarter.

In Edmonton, street furniture saw an increase of 8 points between Q2 and Q3, 2021, while traditional posters maintained their strong presence with an increase of 7 points. Superboards saw the largest increase between July and August of 9 points, the product group then dipped slightly between August and September

## Edmonton Product Groups

Activity Index | 2021 vs. Pre-COVID



by -8 points, perhaps as a result of rising COVID-19 cases and reimplementation of temporary restrictions. Fortunately, as we write this report, analysts have identified that Alberta's fourth wave has subsided.

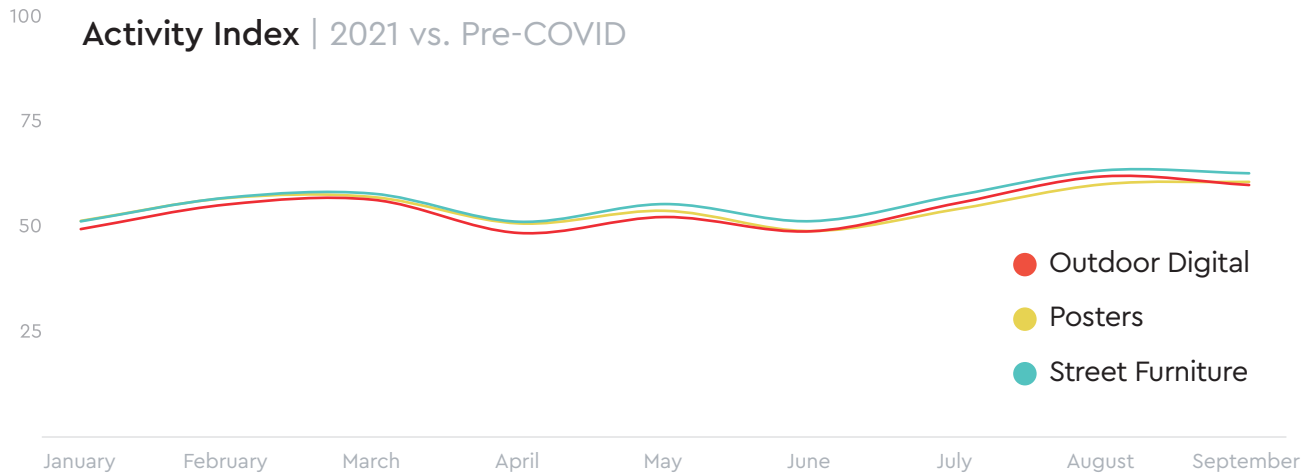
## British Columbia

British Columbia maintains a position as a key tourist destination, both for domestic and foreign travellers. Economic estimates of tourism spending indicate that roughly 40 percent of tourists to British Columbia came from travellers outside of Canada, according to the Tourism Industry Association of B.C. Airline passengers at Vancouver International Airport dropped from 13.7 million the year before the pandemic to just over 3 million in 2020. Passengers picked back up through the first half of 2021 to pre-pandemic levels (13.4 million in the first six months). However, looking at 2021, July's spike to nearly 700,000 passengers indicates confidence that COVID is coming to an end, and travellers are eager to explore the province's attractions.

The related events of August 9 (opening of the U.S. land border) and September 7 (opening to non-essential foreign visits by vaccinated persons) are likely to continue contributing to mobility growth going forward. Also contributing to mobility growth is the reappearance of cultural events in the area, including the Pacific National Exhibition, which was restricted to drive-through attendance in 2020, and this year witnessed attendance of nearly 289,000, according to Georgia Straight.



## Vancouver Product Groups



Vancouver has certainly seen one of the more conservative recoveries across Canada, pacing in a relatively consistent upward fashion. As a market overall, Vancouver saw an 8-point increase between Q2 and Q3, 2021 with outdoor digital leading the charge with a 9-point increase followed closely by street furniture and posters, which saw 8 and 7 point increases, respectively. These trends look to continue as we see more consumers willing to hop on a plane for some much-needed national and international travel.

The trends for monthly tourism growth in 2021 are returning as we can see by the chart below. There was a steep increase in July 2021 for domestic travel into Vancouver. With the reopening of the U.S. land border on August 9 and [Canada's allowance of non-essential foreign entry](#) as of September 7, we anticipate seeing a continuance of the upward trend as we enter into the holiday travel season.

## Eastern Canada Update

### Atlantic

The Atlantic region continued its movement towards increased activity, driven by strength in Nova Scotia and Halifax in particular. Halifax is among the strongest indexing markets as opposed to pre-COVID OOH activity, and while the area experienced somewhat of a slump earlier this year, growth from Q2 to

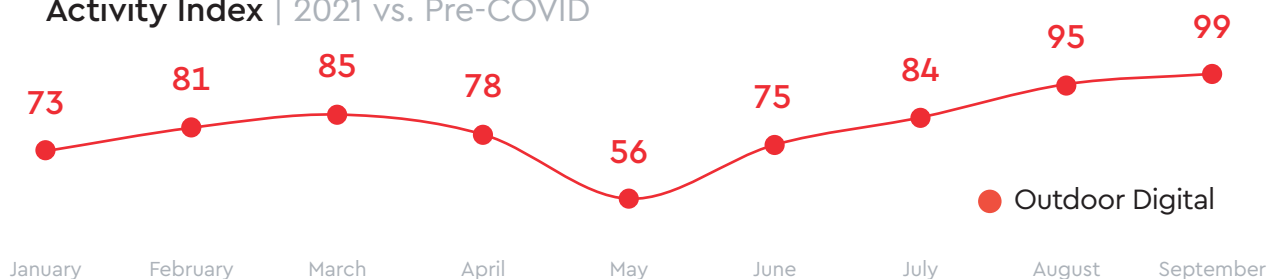
Q3 is in the double digits, increasing by 22 points. Activity in Nova Scotia was no doubt accelerated recently by the region's removal of gathering limits on events (festivals/sporting events) and other previously restricted social and professional interactions. The province moved to Phase 5 of the reopening on October 5. Three-quarters of the population in Nova Scotia are fully vaccinated.

Nova Scotia experienced a boom of visitors in July and August. In comparison to 2019, 2021 tourism figures languished in most months of the year up until July, which witnessed a substantial jump from June, followed by a similar spike in August.

Beginning in late summer, many of these visitors arrived by air with Tourism Nova Scotia counting 53,000 visitors flying to the province in August, more than double the total for the first seven months of the year. August also saw 180,000 visitors arriving by road, an 89 percent increase as compared to August 2020 and a whole lot of consumers directly exposed to out-of-home advertising as they're enroute to the Atlantic. While not yet at the levels that existed in 2019, these are still encouraging signs for the Atlantic region in general and likely to continue going forward.

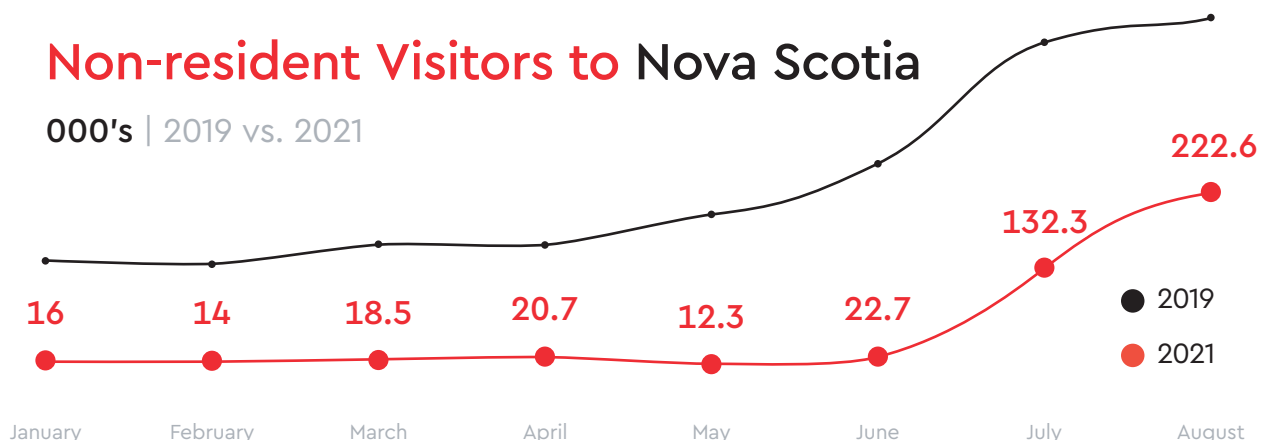
## Halifax Product Groups

Activity Index | 2021 vs. Pre-COVID



## Non-resident Visitors to Nova Scotia

000's | 2019 vs. 2021



# Ontario

The Ontario province has seen a strong rebound in all measures of OOH activity from Q2 to Q3, with Toronto growing 12 points. Ottawa also experienced double-digit growth, with the Ontario side increasing 13 points. Toronto is likely to continue to witness increased activity as a loosening of restrictions continues. For instance, the reinstatement of standing audiences and the removal of capacity limits at live music venues are certain to bring additional concert goers outside.

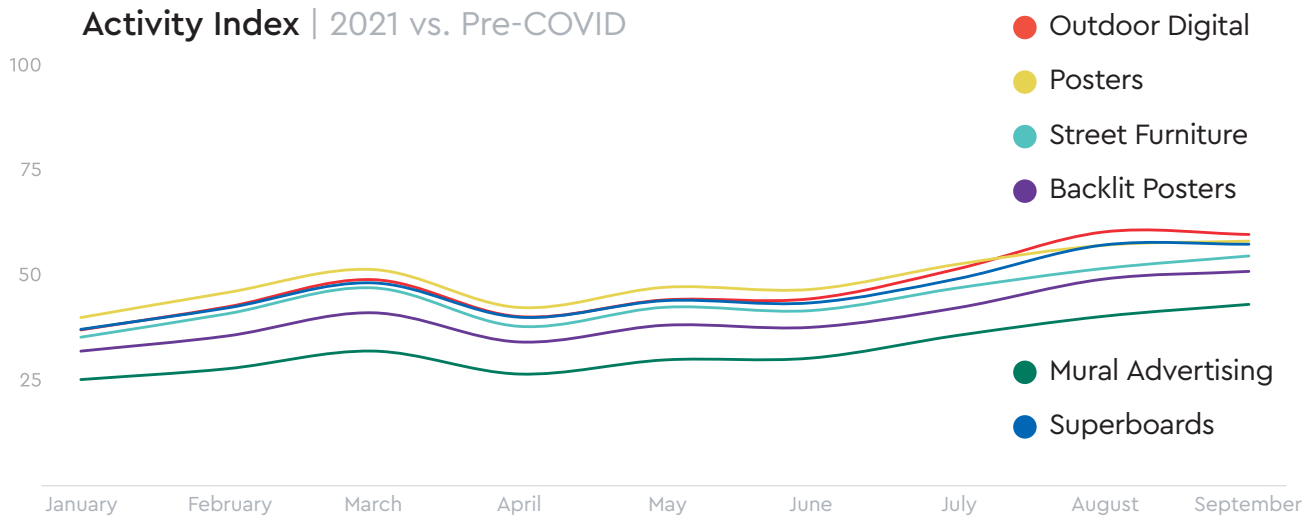
This change apparently occurred two weeks earlier than expected, further indicating an improvement in the current pandemic environment, vaccination rates, adherence to mask requirements, etc. [Anonymized, aggregated data published by Waze](#) compares driven kilometers to a 2020 pre-pandemic period to calculate percent change, which showcases that after a dip in early 2021, vehicle traffic has experienced a steady climb back towards normalcy. The percent change in driven kilometers per day was below the pre-COVID period from March 2020, seeing a significant return to vehicular movements above that baseline in July 2021 and continuing. Currently, kilometers per day are maintaining a positive increase through a good portion of August and September. Of course, with more people getting out of their houses and onto the area's roadways, OOH advertising is sure to make a greater impression. Marketers are taking notice, as well, driving up demand for all types of outdoor media in Ottawa and Toronto.

## Toronto

As noted in our previous issues, Toronto has seen some of the toughest restrictions globally, holding the record for the [longest ban on indoor dining](#), we were finally able to clink our champagne glasses in person, celebrating indoor dining restrictions being removed at the end of Q2 as of June 30, 2021. Assessing Q3 against Q2, 2021, Toronto saw

## Toronto Product Groups

Activity Index | 2021 vs. Pre-COVID



a strong rebound, gaining an impressive 12 points and welcoming back iconic in-person events such as the [Toronto International Film Festival](#) in September. Co-head and artistic director of TIFF, Cameron Bailey, was quoted in a [CTVNews](#) article stating, "I just feel really proud and grateful. Just that experience, bringing people back into movie theatres together, I'll always remember this year's festival for that", illustrating a sentiment we believe many Torontonians share.

A review of product performance from Q2 to Q3, 2021 saw double-digit increases across the board with outdoor digital leading the way with a powerful +14-point increase followed by superboards with a +12-point uptake. Backlit posters, murals, traditional posters, and street furniture all saw a +11-point increases.

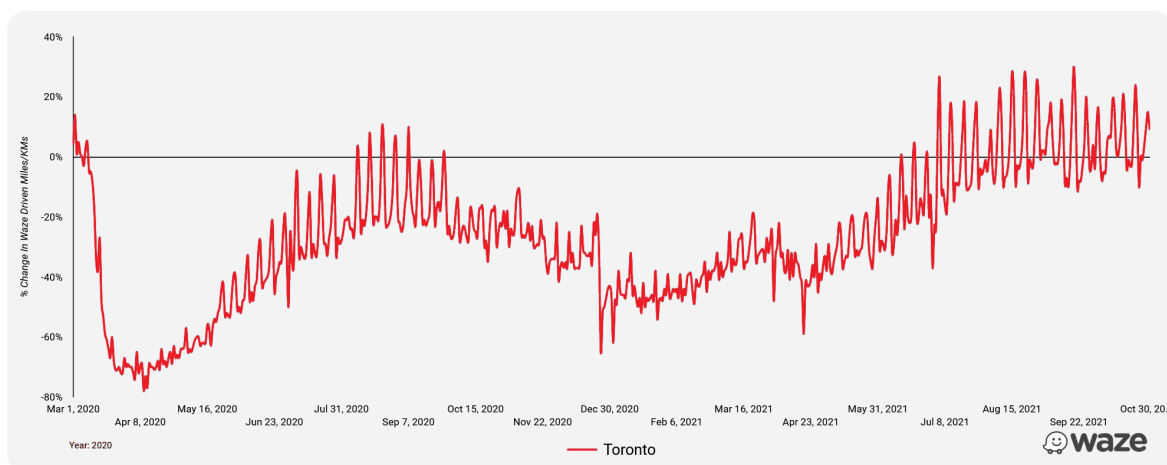
With further [restrictions being lifted in October](#) for concert events, welcoming back our championship Toronto Raptors team and beloved Toronto Maple Leafs to a full-capacity audience, and the return of many businesses to in-office work weeks, the city is vibrant, the car horns are blaring and the bustling energy of Toronto's urban core is on the rise. We anticipate seeing increased activity levels across the board as we lead up to the holiday season and consumers take

to the streets for the iconic [Hudson's Bay holiday window displays](#) and the Distillery Districts infamous Christmas Market, [which this year is coming back with a new name](#), The Distillery Winter Village, bringing thousands of consumers into Toronto's downtown core.

[Waze](#) data shows Toronto has seen a steady climb back to normal driving distances. Levels are still averaging around 0, indicating that the sampled population are driving about as much as they were at the time of the baseline, and much further than they were earlier this year. While that doesn't necessarily mean more cars are on the road, it does mean that the ones that are, are driving farther.

## Driven Miles/Kilometers by Day | Toronto

Percent Change | March 2020 – October 2021



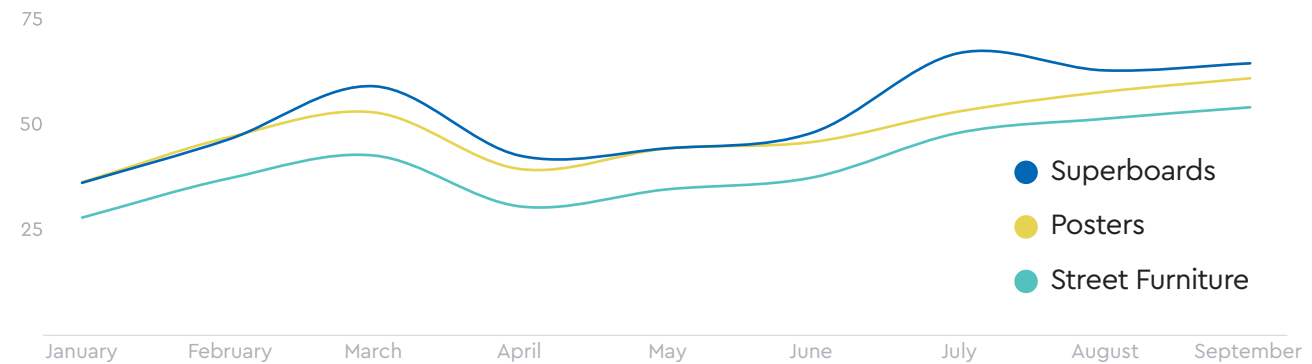
## Ottawa-Gatineau

True to its prior reports, both sides of Ottawa-Gatineau's unique market remain strong and saw double digit growth, with the Ontario half rising +13 points and the Quebec side seeing a bump of +24 points in Q3, likely explained by the heavier restrictions within the Ontario side than on the Quebec side of the market. Examining product level results, Ottawa-



## Ottawa (ON) Product Groups

Activity Index | 2021 vs. Pre-COVID

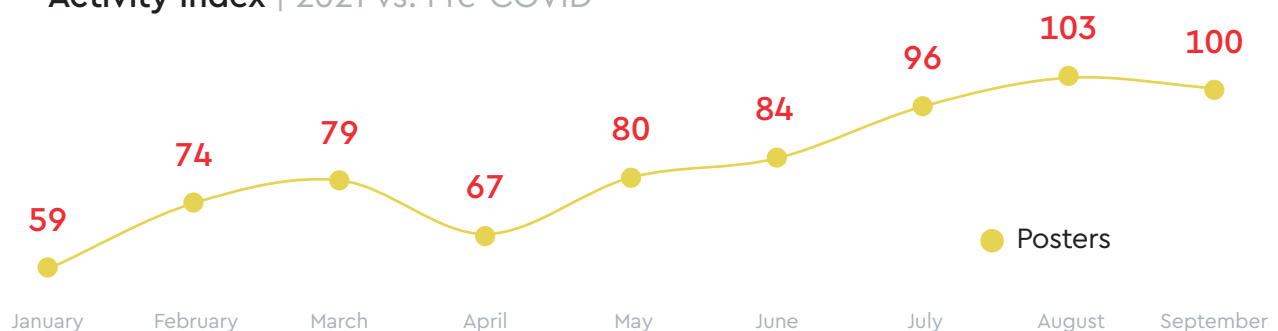


Gatineau (ON) products were led by superboards with a +19-point increase followed closely by street furniture with +16 points and traditional posters with +13-point increases, respectively.

Ottawa is a city that always has something to do, and Q3 was no exception. With the Ottawa Jazz Festival in August and events like the 176th annual Richmond Fair, the [Ottawa Bluesfest in September](#), along with sporting contests like [Atletico Ottawa \(soccer\)](#) and the Ottawa Senators, there's a plethora of reasons for people to enjoy Canada's capital city. Gatineau also saw the [34th annual Hot Air Balloon Festival](#) in September, the biggest event in the Outaouais region. While capacity at the event was limited, it was sure to draw a major crowd.

## Ottawa (QC) Product Groups

Activity Index | 2021 vs. Pre-COVID



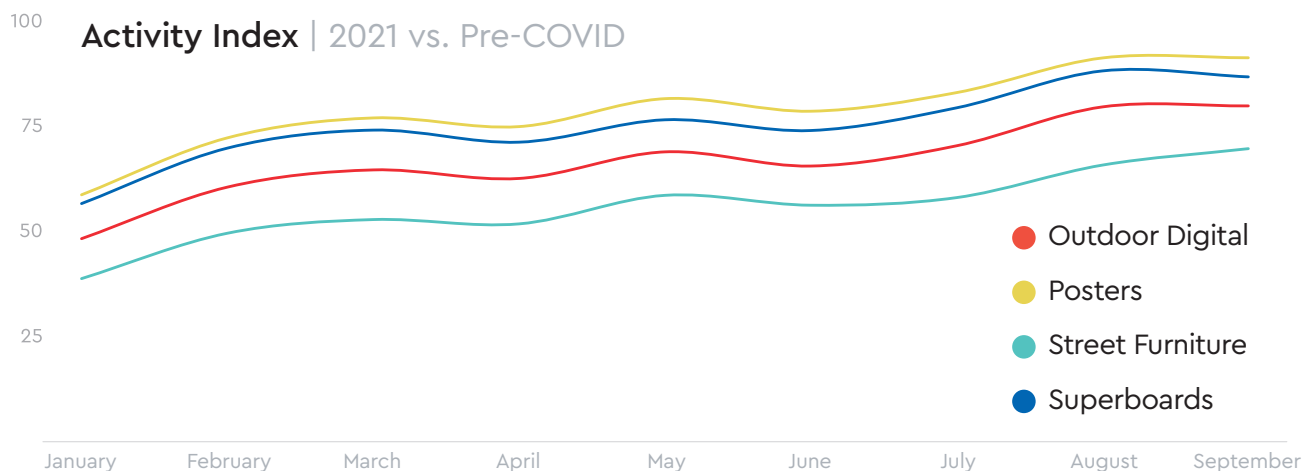
## Quebec

The largest markets in Quebec, Montreal and Quebec City, witnessed double-digit growth in the activity index, gaining 10 and 24 points, respectively. In addition to British Columbia, the province of Quebec is also continuing to maintain a ban on dancing in bars and nightclubs as part of its COVID regulations.

In a recent protest taking place in Montreal, people urged the provincial powers to reconsider and remove this restriction. As one participant in the protest put it, "We're ready, we're responsible people, we're all vaccinated, and we just want to be able to try and get back to normal." Still, the trend is moving in the right direction and towards more lenient nightlife guidelines so people can have some fun.

Both Montreal and Quebec City are reopening as evidenced by the number of events happening in both August and September. A myriad of opportunities for residents and visitors alike to experience events happened in Q3, including arts, food, and film festivals, as well as the 41st annual Montreal International Jazz Festival. Pared down and delayed from its usual June start date, the fact that this festival went on at all is a testament to the region continuing to pace towards normalcy.

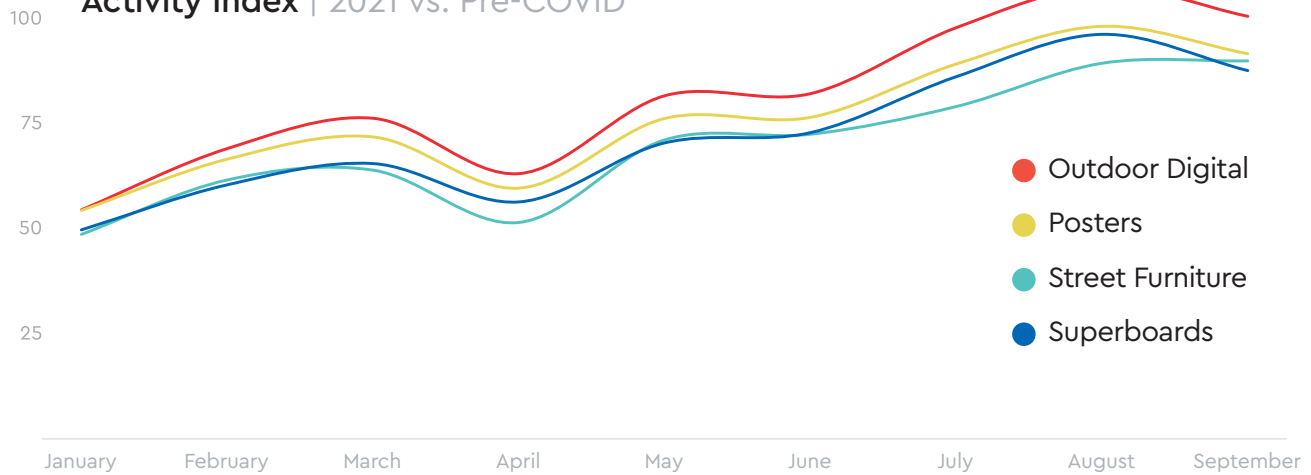
## Montreal Product Groups



With regard to kilometers traveled on the region's roads, and focusing on data provided through Waze, both Montreal and Quebec City have increased activity on the roads with kilometers traveled since mid-July 2021 activity has consistently risen above its pre-COVID benchmark.

## Quebec City Product Groups

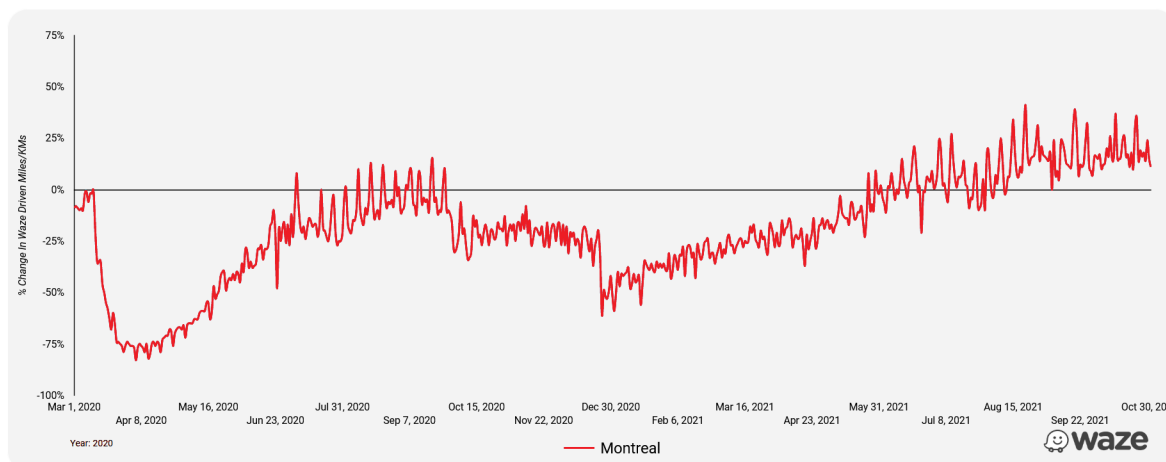
Activity Index | 2021 vs. Pre-COVID



Product results were impressive across the board in both markets. In Montreal, outdoor digital and superboards led the charge with +10 points, followed by street furniture and posters with +8 and +9-point increases. Quebec City also saw outdoor digital in the lead with a +28-point increase, superboards weren't far behind with a +25-point increase and posters and street furniture saw +24 and +23-point increases – overall two very impressive markets.

## Driven Miles/Kilometers by Day | Montreal

Percent Change | March 2020 – October 2021



# Place-Based

The following provides a closer look at place-based venues and overall changes in activity among areas in Canada since the beginning of the pandemic. It is perhaps an obvious understatement that the arrival of COVID impacted society in a substantial and perhaps immutable way.

Among those the pandemic hit hardest are the multitude of businesses (and their employees) who needed to put their lives on hold while the world wrestled with how to address the deadly virus. As the introduction and approval of vaccines began to move things in a more positive manner, small movements towards reopening have resulted in some variance between areas in Canada, as provinces took different approaches to how restrictions would loosen, and which indicators were most critical in their decision making.

The graph below provides an overview of the percentage change in the activity index since the provincial lifting of restrictions. All have achieved positive movement, though clearly some are seeing increases in activity more than others. Montreal saw the highest increase post-restriction removal of +16 points with Edmonton on their tails at +14 points, followed by Calgary at +11 points, Vancouver at +8 points and Toronto at +5 points.

If 2020 was a period of lockdown and social distancing, 2021 was the beginning of recovery and continues to trend positively towards pre-COVID benchmarks. Other indicators outside the activity index align with a transition towards full reopening. For instance, monthly sales among eating and drinking establishments are trending higher towards pre-COVID levels. Although their dataset is only reflective up to July, the correlation between reopening noted in June and revenue can be seen. Another month or two of growth similar to spring and summer will push food and drink spending beyond what it was before

COVID came to Canada's shores. It would not be surprising for August numbers to approach \$7.5 billion, topping previous years' Augusts, traditionally the most profitable month for the nation's hospitality businesses.

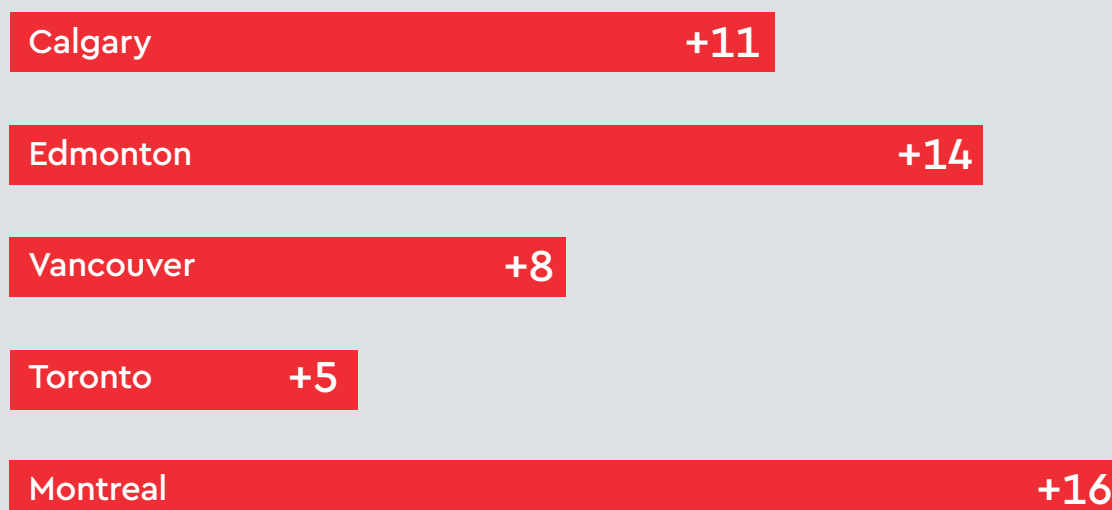
Provinces are continuing to loosen restrictions, which are likely to have a greater impact going forward; for instance, Ontario moved to lift capacity limits for restaurants, gyms, casinos, and other similar establishments in October; Quebec is following suit in November.

Other indications that the Canadian population is embracing some return to normal activity include the resurgence recently of reopening sporting events to spectators. As the NHL and NBA seasons resumed, fans overwhelmingly embraced their return. The loosening of restrictions in most markets allowing a return to full capacity pushed attendance further. The Toronto Raptors home opener was a sell-out, and while NHL venues began with attendance limits, Montreal has recently lifted those and will allow spectators at full capacity. Indoor venues initially began with a 50-percent capacity limit, but those have now been opened at full capacity, perhaps an indicator that future activity will maintain its path towards normalcy.

## Canadian Place-Based Networks

Includes: Arena, Campus, Cinemas, Resto-Bars and Women's Venues

**Index vs Pre-COVID** | % Growth Since Restrictions Lifted



BASED ON THE DATA FOR THE 5 MEASUREMENT NETWORKS COMMB IS MONITORING.



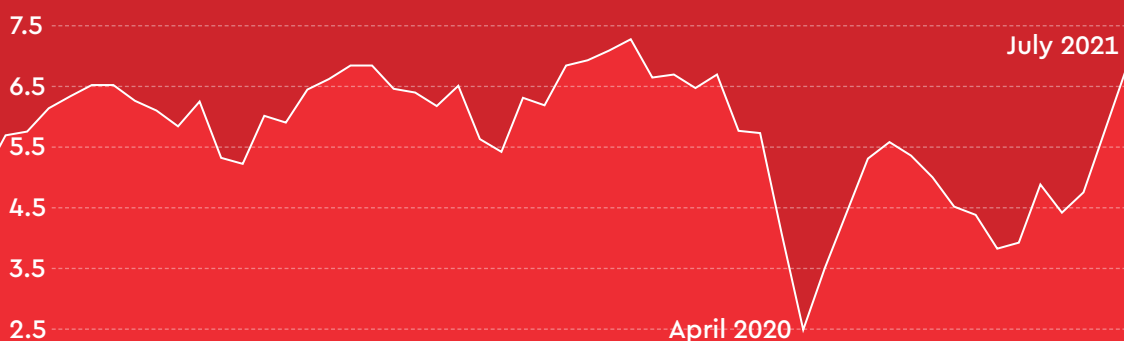
## Resto-Bar

While things still aren't completely back to normal, 2021 has been a year of recovery and has continued to trend positively. For example, according to StatsCan (image below), monthly sales in food and drink venues are trending towards pre-pandemic levels, indicating that the resto-bar industry is on a speedy road to recovery. Although its dataset is only reflective up to July, the correlation between reopening noted in June and revenue can be seen.

Many events such as [Burger Week \(Oct. 14-23\) in Halifax](#) and [Street Eats in Toronto \(November\)](#) are just two examples that seek to increase consumer attendance to local restaurants with a philanthropic flare. Started eight years ago, Burger Week aims to raise funds for Feed Nova Scotia; it's raised more than \$560,000 and, this year, had 142 restaurants participate to both contribute to the cause and to drive business. Toronto's Street Eats, with a similar concept, aims to raise \$250,000 to support those experiencing poverty and homelessness and to drive awareness of local businesses across the city. In both cases, they're drawing incredible crowds, and we anticipate seeing an uptick in our place-based results for our next report.

### Monthly sales of food and drink venues in Canada

In Billion CAD | from January 2017 to July 2021



Across the country, provinces are moving into lighter restrictions as vaccinations increase. In [Alberta](#), July saw a +24-percent increase in receipts for food and beverage establishments. In October, [Ontario moved to lift capacity limits](#) in restaurants, gyms, casinos, and others. [Quebec is following suit in November](#), which should continue the upward trend in activity within our place-based networks.

## Arena

There are so many inspiring success stories across the country about the progress in reopening that exemplify people's eagerness to get back into place-based environments. One significant example is the excitement surrounding the start of both the NHL and NBA seasons in Canada. People overwhelmingly leapt at the opportunity to engage in these sporting spectacles once more, with most markets allowing them to be held at full capacity, something that hasn't happened since 2019 in Canada. In fact, the Toronto Raptors home opener held on October 4, 2021, had 20,000 fans in attendance and was completely sold out. The theme of the night was ["We Back"](#), driving at a long-awaited return to enjoying the experience in person.

Recreational sports enthusiasts [were able to enjoy participation in activities](#) as well as watching them when announcements were made to reopen indoor recreation facilities to vaccinated individuals earlier this year. The latest exciting news is that spectator areas of these facilities are now open at full capacity, whereas previously they were limited to 50 percent.

## Cinema

Perhaps the most emblematic event that brings into clear focus a return to pre-pandemic times is the opening of movie theaters across the country. Many venues are likely seeing a return to greater levels of attendance if anecdotal evidence is any indication. Moviegoers across the country were thrilled when it was announced that cinemas were reopening this summer. There's nothing quite like movie theatre popcorn. Success of blockbuster

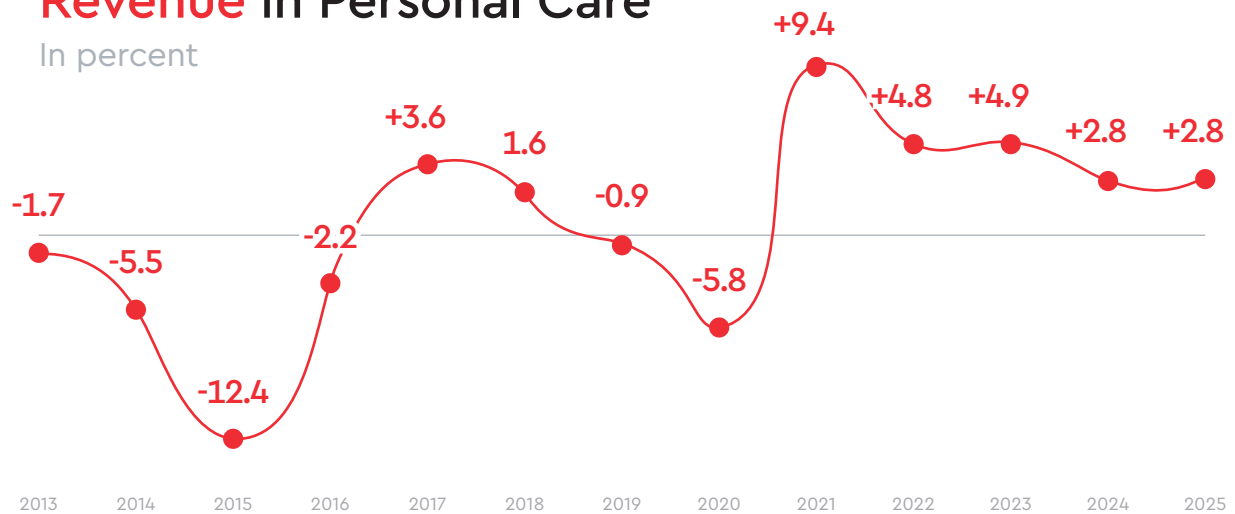
movies like Shang-Chi and the Legend of the Ten Rings and No Time to Die exemplified just how eager people were to see films on the big screen again. There's no end in sight for big-name films in 2021, with many new movies, including Spider-Man: No Way Home and The Matrix Resurrections, slated to release this holiday season. As Rafiq Khimani, General Manager of Cineplex Cinemas Varsity stated, "It [the reopening] has been absolutely wonderful.... We have definitely doubled our attendance this weekend." Currently, there is a relative lack of data available to assess whether that anecdote is being repeated in other theaters; this will be a space to watch during the next several months to evaluate that trend. As Paul Dergarabedian, a cinema executive, hinted, "The upcoming slate of films looks to continue a positive trend of recovery for the business.... As more and more theaters open for business, the industry is counting on the early promise of a strong recovery now [to] carry forward into 2022 and beyond."

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— Rafiq Khimani, General Manager of Cineplex Cinemas Varsity

## Revenue in Personal Care

In percent



With all the excitement about reopening and trends towards normal socialization, it's no surprise that people are spending more in personal care than they did in years past. According to Statista, revenue in personal care in Canada grew by 9.4 percent in 2021, eclipsing projections for 2022 and beyond by a fair margin.

# 1

Find [here](#) a summary of place-based restrictions by province and territory.

# 2

Additionally, here are interesting insights outlining a few different stories detailing Canadians' excitement for [back-to-activities in each Province](#).

# Summary of Findings

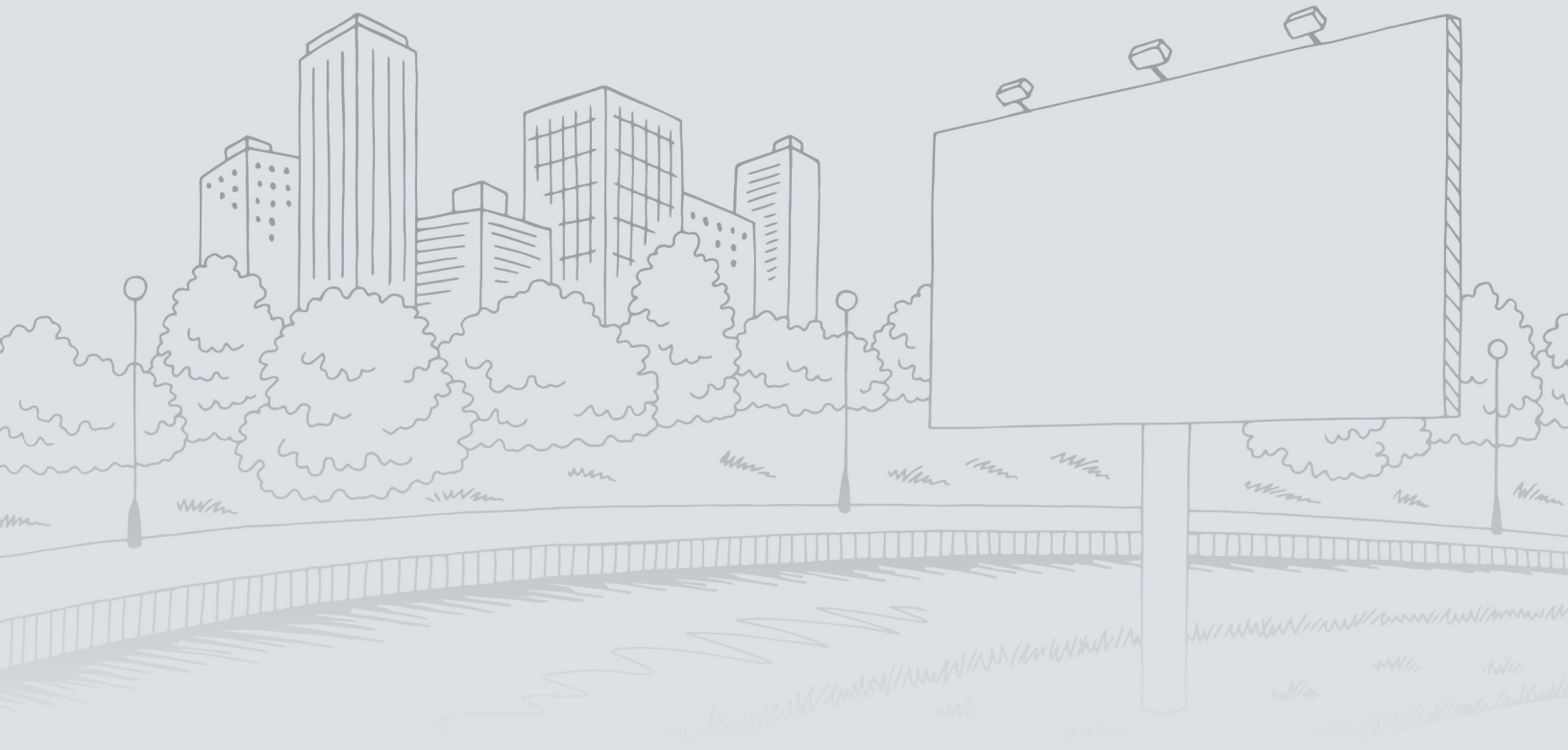
This edition of the report marks the first indication that Canada as a whole has erased the most jarring effects of the COVID-19 pandemic. Events that went on hiatus during 2019 and 2020 are coming back full-force. Restaurants and entertainment venues are operating at near-full capacity, and people are getting out of their homes to congregate and travel. Indicators across the board reveal increased social activity and mobility, putting more citizens and tourists in position to view all types of OOH marketing media and messaging. Advertisers are taking notice and have been quick to respond.

Every Canadian market tallied substantial growth from Q2 to Q3, many recording double-digit jumps. Particularly encouraging, place-based signage has picked up as movie theaters, sports arenas, concert venues, and amusement facilities are quickly coming back online.

Much of the credit goes to Canada's first-line responders, medical professionals, political and community leaders, and responsible citizens who have kept the pandemic at bay and sustained the economic recovery. Continued vigilance is necessary, but with adherence to masking, distancing, and occupancy guidelines, it is easy to expect the nation to maintain its momentum and return to an era of prosperity.



# Thank You!



## ↙ Get in touch!

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