INSIGHTS REPORT

COMMB
Canadian Out of Home Marketing and Measurement Bureau

IMPACT, GROWTH & CHANGE IN OOH

August 2023

President's Note

Mid-summer is upon us, and thus far in 2023, we have witnessed tremendous growth and transformation in the out-of-home environment. We continue to witness our media focus shift on technology advancements, personalization and customer engagement, as well as a strong focus on sustainability, diversity, and inclusivity in advertisements. Additionally, we are witnessing Canadians rushing back to their favourite resto-bars and retail locations to enjoy real, tangible in-person experiences. As a result, the out-of-home medium experiences heightened exposure. In this edition of the Insights Report we delve into the resurgence of resto-bars, the vibrant energy of brick-and-mortar, and focus the spotlight on the 2SLGBTQIA+ audience by outlining their consumer profile and how to resonate with them in an impactful way.

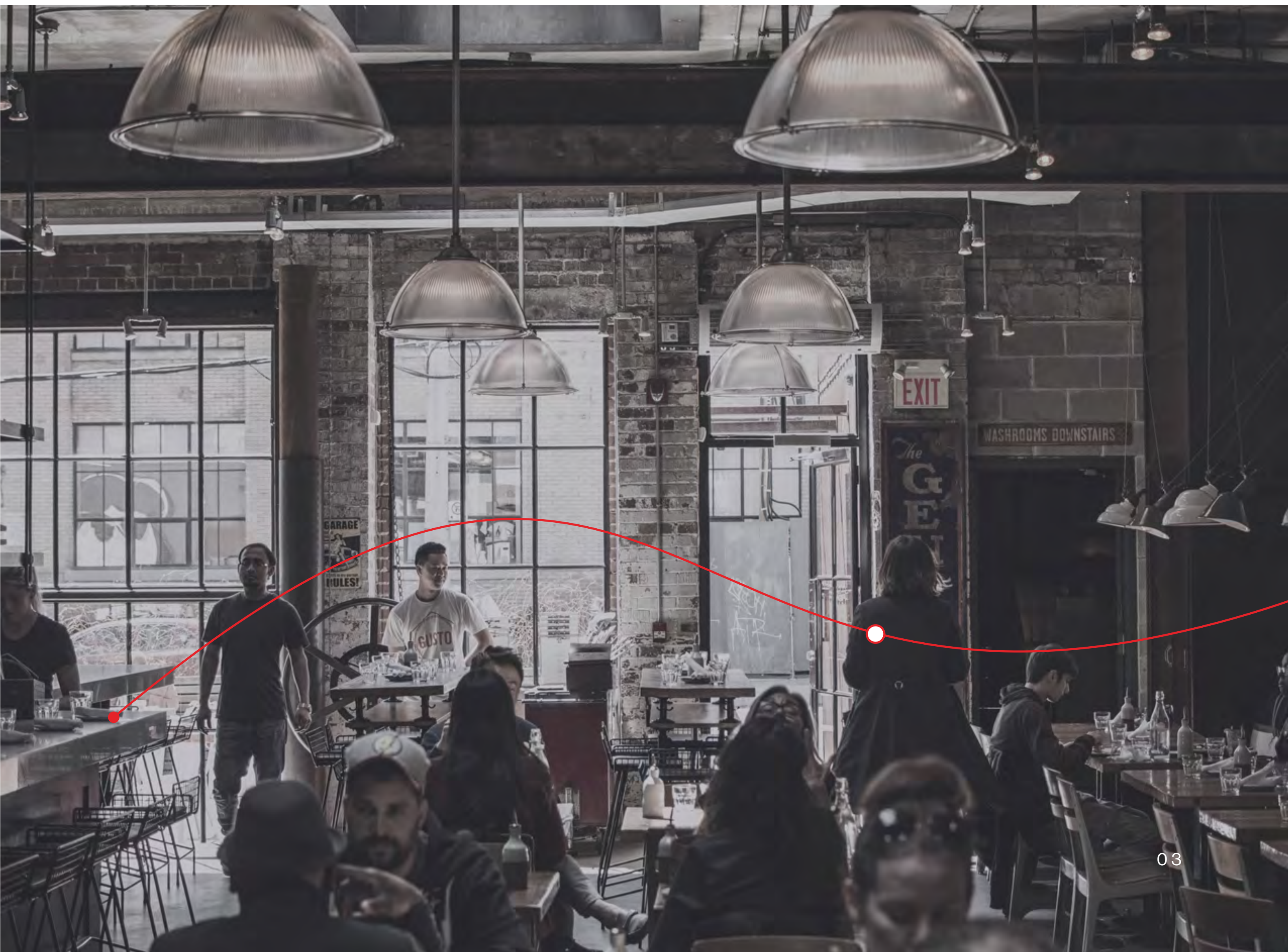
Resto-bars are 'bouncing back from the dip' seen in 2020, as reports show that in the first quarter of 2023 **restaurant visits increased by 11% and spending rose by 18%**. The return to pre-Covid dining, delivery, and takeout levels occurred as early as the beginning of spring. According to Deloitte, by March 2023, 55% of customers were visiting casual restaurants as often or more frequently than they did before the pandemic. Perhaps more surprising, given the upsurge in takeout spawned by the pandemic, 69% are still using these services just as often.

This resurgence could be due to the fact Canadians are back in-office or in a hybrid work environment, encouraging dine-in experiences in the morning hours and at lunch or dinner with coworkers. Limited-service eating places such as take-out only establishments and food trucks are also continuing to see growth, surpassing pre-pandemic levels in some instances. This trend, which may have been influenced by previous years and further amplified by the impact of COVID-19 restrictions, showcases the preference of Canadians for the convenience and enjoyment of dining out. During the COVID-19 pandemic, the government stepped in to support the development of patios for resto-bar establishments.

Canadians are back in-office or in a hybrid work environment

We continue to see patios being erected all across Canada, which is proven to significantly boost restaurant gross profits, with the potential for up to a 65% increase. With a growing array of dining establishments available, the expansion of out-of-home assets provides opportunity to connect with a broader spectrum of Canadians.

Whatever the reason, and no matter whether they cater to families, after-work happy hours, or secluded dinners for two, restaurants, cafes, and bars are stepping up efforts to lure repeat customers and build reliable stables of regulars. Engaging with new and casual customers along their commutes or as they enjoy outdoor activities delivers strong ROI. Studies show that attracting new dining and drinking customers costs multiple times more than retaining those who already frequent an establishment. OOH media is an ideal way to market loyalty programs, incentivize repeat business, and boost order size. Alleviate concerns over the cost of dining out



and a potential recession by incorporating discounts for customers who scan QR codes or otherwise interact regularly with your OOH campaign.

Brick-and-mortar continues to thrive post-pandemic, hand-in-hand with e-commerce. The in-person shopping experience is loved and preferred by many. The convenience of physically touching items, receiving in-person assistance from sales associates, and trying on clothing and accessories before purchasing are all aspects of the shopping experience Canadians crave. With Canadian retail sales climbing 2.4 per cent in March compared with the same month a year earlier, brick-and-mortar is forecasted to be on a positive trajectory for the rest of 2023. Another trend we are seeing in this space is technological advancements. The brick-and-mortar store, rooted in tradition yet far from stagnant, embraces the power of technology to elevate the in-store experience which is becoming well-received by shoppers. For countless Canadians navigating their shopping journey, seamlessly bridging the convenience of the online realm with the offline environment has become an essential in a positive experience. Combine entertainment with shopping – retailtainment – by making OOH messaging not only fun but also addictive, through games, quizzes, trivia, and education on new recipes, ways to accessorize fashions, or places to take recreation equipment, take site-based messaging a step above mobile ads.

Audio OOH and digital OOH screens penetrate these spaces, proving to be a significant aid in the shopping environment, as **67% of consumers say they frequently buy products based on digital signage visuals**. With tech at the forefront of these spaces and shoppers yearning for a deeper more convenient in-store experience, in-store digital displays are no longer just an option. They are must-haves – not solely for wayfinding and in-store promotions but for honing in on the capabilities of dynamic digital to reach specific audience segments that can be difficult to reach.

As the second iteration of the COMMB Insight Report's Audience Spotlight, we discuss the 2SLGBTQIA+ audience. It has been proven that younger audiences, within the Gen Z and Millennial age range, champion the out-of-home medium. A large quantity of this demographic is what makes up the 2SLGBTQIA+ community. We also know that Gen Z generates about $229 billion annually just in wages made via full-time employment.

Reflecting on the facts, we can assume the 2SLGBTQIA+ community would

make an excellent target audience for brands. With nearly 20% of Generation Z, 11.2% of millennials, and less than 3.3% of GenX and Baby Boomer generations identifying as LGBTQ+, it is obvious that younger people are less self-concious about living their true selves than their parents and grandparents who may still fear social or professional prejudice. The trend bears paying attention to, especially for brands and venues that cater to younger consumers. These evolving societal norms bear directly on consumer behavior and should motivate marketing strategies: As 2SLGBTQIA+ self-identification grows, it solidifies into an identifiable, reachable consumer demographic that can deliver strong revenue for companies that represent and portray authenticity in their OOH marketing. But it's not about throwing rainbows on a billboard during Pride Month and calling it a day – it's about real, meaningful support that transcends beyond advertising. We discuss more about this group's consumer trends, their values, and how successful brands have engaged with this community in a way that resonates.

We hope you enjoy this edition of **COMMB's August 2023 Insights Report!**

Amanda Dorenberg
President, COMMB

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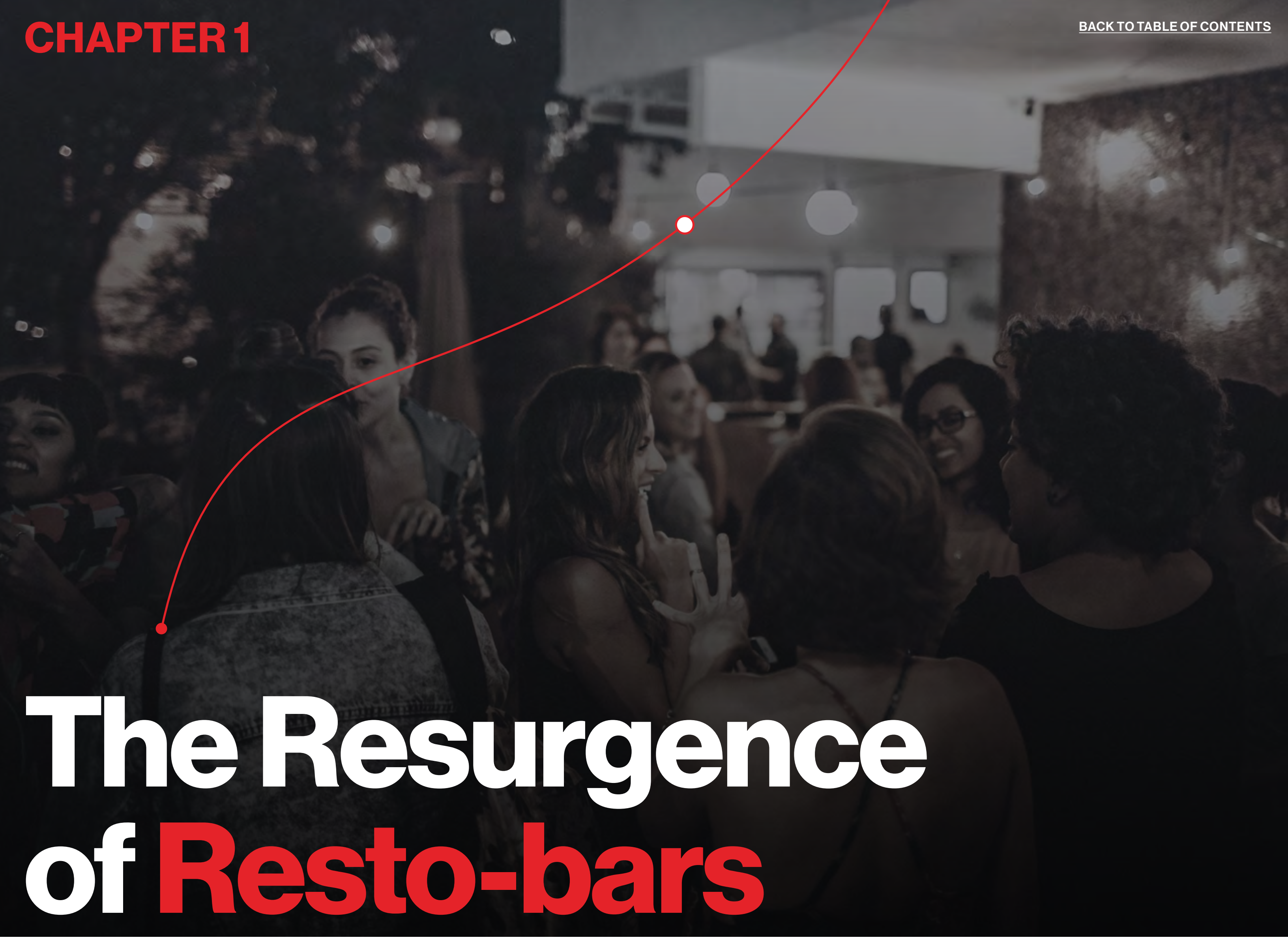


The Resurgence of Resto-bars

From the warm ambiance of a restaurant to the spirited atmosphere of a bar, or anything in between, Canada's food service establishments are seeing prominent recovery and have reclaimed their place as hotspots for dining, socializing, and reconnecting with friends and loved ones outside of the home.

From bustling cities like Toronto and Vancouver to cozy towns tucked away in picturesque Canadian landscapes, resto-bars have faced unprecedented obstacles over the past few years. This section of COMMB's Insight Report will explore the 'bounce back from the dip', investigate how the industry is once again growing, and in some cases, surpassing its pre-pandemic levels. We'll dive into subsectors of the industry, such as Quick Service Restaurants (QSR), food delivery services, and the infamous summer patio season – as Canadians strive to get outside during the summer weather.

The bounce back from the dip

The resto-bar industry in Canada has displayed wonderful resilience and revival after the dip in 2020 due to the pandemic. Reports show that in the first quarter of 2023, **restaurant visits increased by 11% and spending rose by 18%** compared to the same quarter the previous year. It should be noted that this is especially promising despite current inflation trends and higher prices. **Consumers are visiting restaurants more and more frequently since March 2020**.

The recovery of this sector can be attributed to multiple factors. People are slowly returning to their workplaces and getting back into 'normal' routines outside their household. This behavioural change has contributed to increased visits to food services throughout the day. A subsector of this industry – breakfast/morning snacks – **has seen significant growth, with demand being up by 13%**. This is a great example of people leaving their homes for work or morning routines, and subsequently, being exposed to OOH. Lunch, dinner, and afternoon snack visits also **saw growth of 10%, 10%, and 8%**, respectively, compared to the same quarter last year.

Total Spend in Canada:

According to Statistics Canada, total food service and drinking places spend is up 11.1%, with April 2022 spend at $6,865,420 versus April 2023 at $7,725,198.

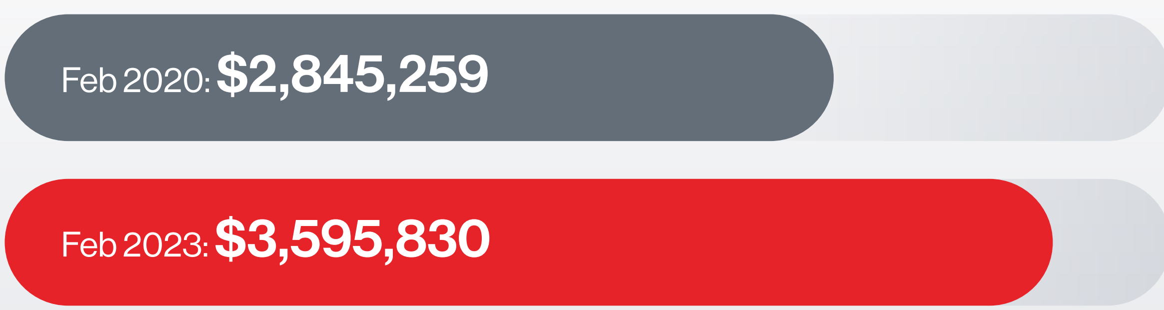
Current dollars   Trend-cycle (current dollars)

A medley of dining destinations

The resto-bar industry invites consumers into a medley of dining and drinking options. From the elegance of full-service restaurants to the convenience of food trucks and take-out establishments, or even specialized food services and bars: each subsector is experiencing unique levels of recovery and growth.

For instance, recent data from Statistics Canada reveals a compelling trend: limited-service eating places experienced a lesser impact from the pandemic and exhibited a quicker recovery compared to other resto-bar subsectors. These establishments have even surpassed their pre-pandemic sales figures. This phenomenon can be attributed to the availability of take-out and delivery services that remained operational during the pandemic, pointing towards a shift in consumer habits and a growing reliance on these convenient and expedient dining experiences.

Limited service eating places sales figures



It isn't just this subsector experiencing substantial growth. On a year-over-year basis, **unadjusted sales in the food services and drinking places subsector for March 2023 were up by 14.4% compared to March 2022**. In the same period, sales for food purchased from full service restaurants increased by 12.3%, while sales for alcoholic beverages served in licensed establishments rose by 9.8%. Special food services saw a 41% increase, while sales at limited-service eating places rose 16.7%.

The role of food delivery services

The popularity of food delivery services in Canada has continued to grow, with the pandemic affecting people's food ordering habits long-term. Canadians embraced the convenience of having their food delivered, with a majority using online platforms.

Delivery by the numbers

$32

Canadians spend an average of $32 per online order

$98 Bn

Canadian food delivery market is set to reach $98 billion by 2027

73% – of restaurant operators believe third-party delivery will continue to grow

55% – of Canadians have used SkipTheDishes in the last 12 months

>50% – of bars and restaurants say they will likely adopt contactless delivery on a permanent basis

According to Made in CA, people with higher incomes are more likely to order food online, especially if they have children. Similarly, students are more likely to use delivery services at 26%.

What does this mean for resto-bars? Food delivery plays an important role in this industry. It can increase revenue for restaurants, allowing eat-in restaurants to tap into a larger customer base while expanding their exposure and customer base simultaneously. Resto-bars encourage clientele to venture out of their homes and engage in social interactions. Consequently, successful establishments serve as catalysts for OOH advertising. Using tools like food delivery to enhance prosperity can only continue to help OOH.

Patio season is in full swing

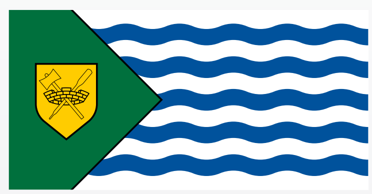
The patio season here in Canada is in full force this summer and government agencies are stepping up to continue support this area of the industry. Many restaurant establishments put serious efforts into their patio planning, recognizing the importance of outdoor dining in the Canadian climate. The popularity of patio season surged during the pandemic due to restrictions and its popularity has continued to increase.

Adding an outdoor patio has been shown to significantly boost restaurant gross profits, **with the potential for up to a 65% increase**, according to a report by VSAG. This presents a great opportunity for operators to increase their revenue, particularly during peak seasons for outdoor dining.

The Canadian government is taking steps to assist restaurants in their patios:

In Ottawa, **restaurants will receive a 50% discount on fees** for patio space, and discussions are underway to make pandemic-induced changes permanent (such as allowing patios on sidewalks and roadways).

Toronto's CaféTO program, which supports outdoor dining, has been made permanent, and alleviates financial pressures on restaurants. Fees for this program have also been significantly reduced.



In Vancouver, the B.C. government has extended temporary expanded service area (TESA) authorizations until December 31, 2024. This extension allows liquor-licensed businesses to **create or expand outdoor seating spaces, including patios, to accommodate the ongoing patio season**.

As customers make their way to their favourite resto-bar, they are likely to come across various OOH advertisements. These can include both place-based assets within the resto-bar itself, as well as billboards and transit shelter ads encountered during their travels. With patio season in full swing, it is reasonable to expect that people during the summer and fall months will be more attentive to OOH advertisements.

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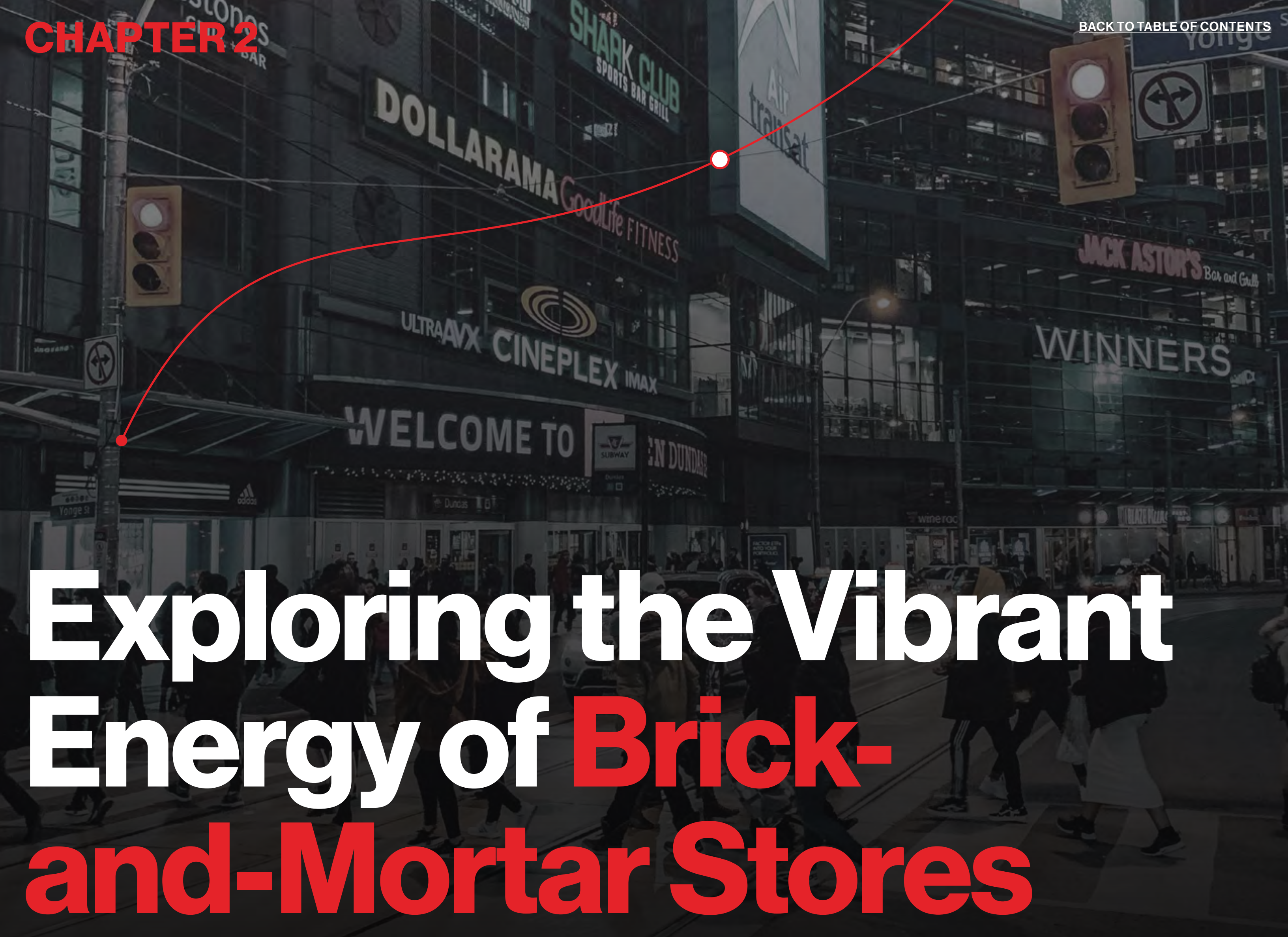

Exploring the Vibrant Energy of Brick-and-Mortar Stores

2023 could be considered a 'new year, new me' era as Canadians redefine their lifestyles and embrace a sense of adventure post-covid. With brick-and-mortar stores facing challenges during the covid-19 lockdowns, e-commerce accelerated and became an essential for businesses to continue thriving, or at least stay afloat. However, with the return to normalcy, brick-and-mortar locations are seeing an influx of visitors - providing the retail consumer an unbeatable, physical experience that the digital world would struggle to replicate. The ability to see and touch products, try on clothing and accessories before purchasing, receive immediate assistance from staff and the convenience of browsing multiple products at once are all aspects of the brick-and-mortar experience that many Canadians crave while shopping. An omnichannel strategy has included brick-and-mortar since the dawn of time - and Canadian retailers are continuing to incorporate physical retail establishments.

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While brick-and-mortar stores continue to serve their primary purpose as in-person shopping destinations (accounting for 93% of usage), they have also evolved into hubs for home and office deliveries (55%) and fulfilling BOPIS (buy online, pick-up in store) orders. The once perceived rivalry between e-commerce and brick-and-mortar retail has transformed into a collaborative partnership, working in tandem to offer diverse consumer experiences that cater to a range of needs.

How retailers are utilizing their physical units?

93% – in-store shopping

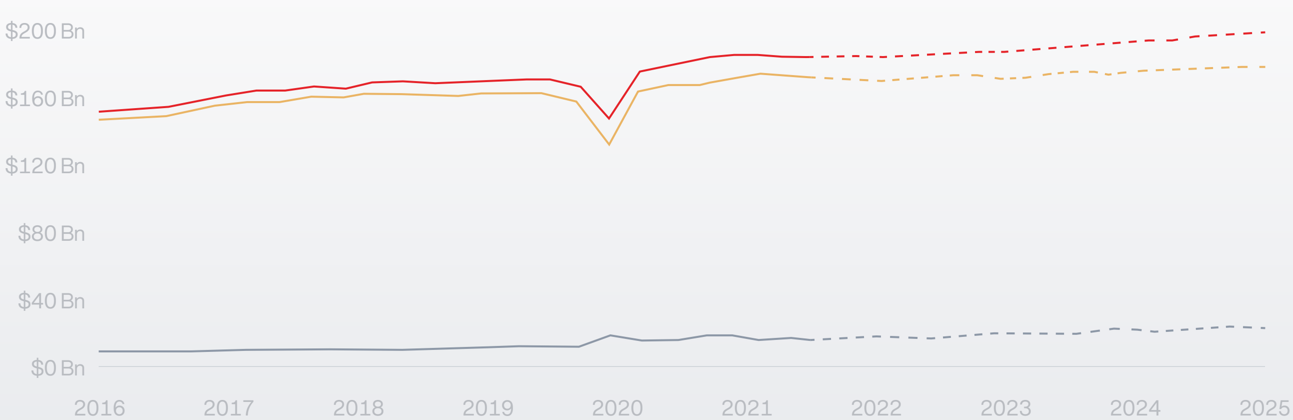
55% – fulfillment of home and office delivery

52% – fulfillment of BOPIS orders

What are the facts?

1. Canadian retail sales climbed 2.4 per cent in March compared with the same month a year earlier, outperforming most developed markets around the world.
2. 5.7% annualized increase in consumer spending in Q1 2023.

Historic and forecasted growth in total Canadian retail sales



3. **Store vacancy rates are declining.** "A combined average vacancy rate of 10.3 per cent was reported for retail properties contained in the MSCI (Morgan Stanley Capital International) Index, as of the first quarter of 2021. The rate has steadily declined since then, with an average of 8.4 per cent reported at the midway mark of 2022"

4. "Foot traffic is catching up, interest in in-store purchases remains high, and pent-up demand for travel and services is leading to new openings, especially restaurants. Many retailers and food-services operators have concluded that this is a window of opportunity they shouldn't miss, and some are willing to absorb the current high construction costs even building entirely new spaces in order to capitalize." - JLL Real Estate Firm

5. There is a demand for retail space in Canada, which continues to outpace supply. Construction for these spaces are unable to keep up with the influx of demand.

Specific industries are finding even more positive results since opening their doors back up post-pandemic. Clothing, shoes, and other fashion accessories have emerged as the top-performing categories in 2022, and this trend is expected to continue in 2023 as people resume their normal activities post pandemic.

Other areas in which retail environments are thriving include building material and garden equipment and supplies dealers (+1.6%), as well as at sporting goods, hobby, musical instrument, book, and miscellaneous retailers (+1.6%).

Consumer Insights

Canadians continue to embrace the in-person shopping experience, demonstrating a strong preference for traditional retail settings. A remarkable 73% of Canadian consumers indulge in the pleasure of visiting physical stores on a monthly basis or more frequently.

Top reasons Canadians want to shop in-store

73% – enjoy shopping in-store and missed it during COVID-19 lockdowns

56% – check the product is the correct item and not broken/faulty

52% – prefer to view/test products before buying

Spontaneous shopping is a common occurrence in physical retail establishments, and it goes beyond what one might typically imagine. Even when customers visit physical stores to collect their online orders, more than half end up adding extra items to their baskets. The in-person shopping experience influences consumers, encouraging them to make additional purchases and contribute to the revival of brick-and-mortar stores. This collaboration is an excellent example of e-commerce and brick-and-mortar working together to create seamless touchpoints for the shopper.

When customers pick up their online order(s) in-store, do they usually buy something else that was not in their original order?

51% 27% 22%

Yes No Unsure

Retailers are leaning into technology enhancements

Brick-and-mortar stores have enhanced the in-store experience by offering self-serving technologies - and they're valued by the Canadian shopper. 52% say knowledgeable and helpful sales associates are an appealing part of in-store shopping, and self-serving technologies aid in the support of the shopper. Even in this physical environment, technology plays a part to enhance the shopping experience for consumers.

Outside of self-serving technologies, brick-and-mortar stores are adding an abundance of tech-focused additives to the shopping experience to connect the online convenience with the offline environment. Some key examples are:

Mobile apps providing store locations, digital catalogues and real-time inventory locations.

Augmented Reality which provides the shopper interactive experiences in-store, like virtual clothing/accessory try-on experiences or visualize furniture placement.

Self-checkout and cashier-less systems provide the shopper with reduced wait times.

Internet of Things (IoT) integration is being utilized to enhance the shopping experience. Retailers are leveraging IoT technologies to gather data and optimize the in-store experience. (For example, sensors can track foot traffic patterns, monitor inventory levels, adjust lighting and temperature settings, and send notifications to store associates for replenishment or assistance.)

Beacon technology is becoming an essential in retail locations. Beacons use Bluetooth Low Energy (BLE) signals to transmit information to nearby smartphones. Stores can utilize beacon technology to send personalized offers, discounts, and product recommendations directly to customers' devices as they browse the store, enhancing engagement and driving sales.

Virtual Reality (VR) and Virtual Fitting Rooms are being integrated by some retailers looking to offer immersive out-of-the-box experiences. Virtual fitting rooms allow customers to virtually try on clothes, accessories, or even test different makeup looks without physically trying them on.

As retailers and brick-and-mortar locations work to enhance their customers' experience with the adaptation of technology, OOH operators follow suit with building assets within these spaces. Dynamic digital screens have the capability to showcase targeted advertisements, product information, promotions, and even provide wayfinding assistance within the store. They can be easily updated and tailored to different customer segments, making this an excellent solution for advertisers looking to reach a specific audience - and they work. 67% of consumers say they frequently buy products based on digital signage visuals. In-store shoppers are watching the evolution of technology penetrate their favourite retail locations, enhancing their experience day by day, and place-based digital screens are a part of this elite environment.

Retail Digital Signage Solutions

90% – buyers make purchase after watching a video

76% – of US consumers visit stores with digital signage

67% – of customers purchase being influenced with signage visuals

24% – increase in footfall witnessed with retail digital signage installation

80% – of brands noticed up to 33% increase in sales

80% – of millennials love stores with interactive digital kiosks

35% – reduction in perceived wait time due to digital signage

While brick-and-mortar shopping represents the traditional approach, it is far from being stagnant or outdated. Technology is becoming a main focus to enhance and evolve the brick-and-mortar space. Knowing that, we can assume that place-based OOH will continue to thrive alongside 'smart retail' with endless capabilities of dynamic digital at the fingertips of brands and advertisers. With e-commerce and brick-and-mortar both occupying a special place in the hearts of shoppers, both are poised to flourish alongside each other, as well as independently, in the years ahead.

Audience Spotlight

LQBTQ+ Community

We have a deeper understanding of the out-of-home audiences we reach with outdoor advertising - although out-of-home is a one-to-many medium and reaches mass audiences, we are now aware through a multitude of studies that **Millennials and Gen Z's (18-38) are an extraordinarily receptive audience when it comes to recalling the out-of-home medium**. One theory worthy of contemplation is that repeated exposure to online advertisements may gradually diminish their persuasive impact. Another theory could be due to fraudulent ads penetrating the online space, and out-of-home holding a level of trust as a tangible, 'real-life' advertisement. Regardless of the answer, we know that this audience is an excellent target. Acquainting ourselves with the Millennial and Gen Z audiences as out-of-home patrons unveils opportunities for advertisers and brands to speak to, engage with and in turn, build loyal brand advocates.

Gen Z's generate about $229 billion annually just in wages made via full-time employment.

58% of the LGBTQ+ community is 34 years or younger in age, 73.4% are under the age of 44. This is disproportionately skewed compared to the national population, making this diverse audience a prime target for out-of-home advertisers to reach. Consisting of roughly 1 million (4%) of Canada's population, the 2SLGBTQIA+ community should not be overlooked as a primary target audience. There is an abundance of research regarding a desire for inclusivity in advertisements and audiences longing to feel connected to brands beyond the ad. In fact, 70% of Gen Z consumers are more likely to trust brands that show diversity in their ads. Combine this knowledge with this group acknowledging out-of-home on a regular basis, and we've discovered a community that is undoubtedly a remarkable audience to engage with.

Who are they?

Young and trend-seeking, the 2SLGBTQIA+ community is diverse, affluent and value-driven. 35% of this audience has a salary of $44,000 CAD or higher. They are educated, from smaller households and more likely to live in a larger cities. More than 40% of 2SLGBTQIA+ consumers live in urban centres, compared to 27% of the total population.

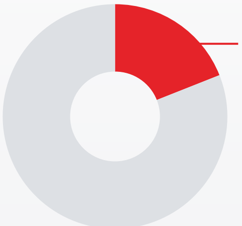
What are the facts?

57%

of 2SLGBTQIA+ households are more likely to choose a store that offers high quality prepared foods and hot meal solutions

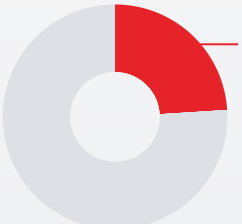
63%

of 2SLGBTQIA+ households are more likely to choose a store that carries ethnic/imported products



19%

of 2SLGBTQIA+ households are trying to incorporate more plant-based proteins into their diets, and 18% followed a vegetarian diet last year



24%

of 2SLGBTQIA+ households say they only buy organic or plant-based beauty products

65%

of 2SLGBTQIA+ households are trying to lose weight and 64% are looking for products with reduced sugar

Source: Consumer Data on LGBTQ+ Canadian Households Nielsen

Sustainable and ethical values

This audience is committed to living a healthy and sustainable lifestyle, and they expect to see the same values in the brands they support. Although, brand loyalty for the 2SLGBTQIA+ community spans beyond a brand's core values in the sustainability and ethical sense. This audience will choose to support brands that are outwardly supporting the 2SLGBTQIA+ community and proactively including this diverse group in advertisements. 55% will choose to do business with companies that are committed to the diversity and equal treatment of the LGBTQ2+ community.

During Pride month, corporations tend to utilize this time to speak directly to the community, and it can be seen as 'jumping on a bandwagon' for brand visibility. Supporting this community and including diverse campaign messaging throughout the entirety of the year is an ideal strategy that is more accepted within the 2SLGBTQIA+ community. **72% believe brands should do more to support this community outside of Pride**. By providing real, authentic support all year long, brands will be more likely to attract 2SLGBTQIA+ shoppers. Additionally, 70% of those in this community state they would pay a premium for a product from a company that supports the LGBTQ2+ community, and 78% would switch brands that are known to be LGBTQ2+ friendly.

OOH, and other traditional media, have work to do to become more inclusive, but have tremendous opportunity for growth with these consumers:

LGBTQ+ perceptions of non-inclusivity in advertising

45.2% – Social media

47.2% – People (influencers)

47.8% – Streaming movies/TV series

48.8% – Podcasts

50.2% – Music streaming services

52.6% – Online (excluding social)

56.3% – TV

57.7% – Magazines

61.1% – Cinema/Outdoor

71.6% – Radio

71.8% – Newspapers

Read as: 78.1% of LGBTQ+ identifying people believe newspapers are very non-inclusive of the LGBTQ+ community.

Source: Nielsen global LGBTQ+ inclusive media perceptions study, 2022.

Ways to improve LGBTQ+ inclusivity in media

50.5% – Avoid stereotyping individuals in advertising/programming

46.0% – Be more authentic/realistic in depictions of LGBTQ+ individuals in advertising/programming

40.3% – Use of more LGBTQ+ individuals in advertising/programming

40.3% – Ensure LGBTQ+ inclusivity is ingrained in all areas of a company, not just in adv./prog.

40.0% – Involve the LGBTQ+ community when visioning and creating advertising/programming

Read as: 46% of the LGBTQ+ community believes improved authenticity will help improve inclusivity in content and advertising.

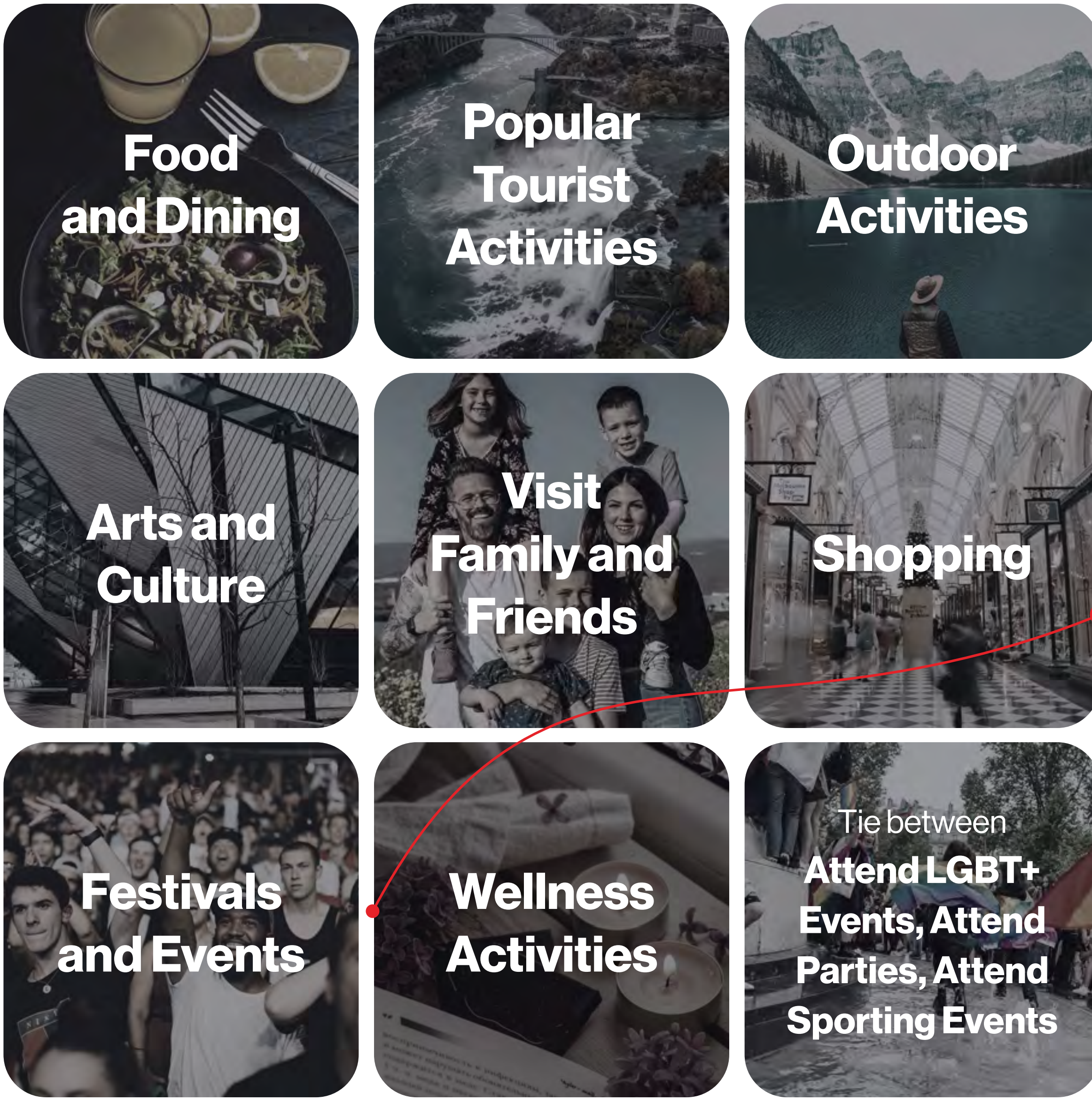
Source: Nielsen global LGBTQ+ inclusive media perceptions study, 2022.

The 2SLGBTQIA+ Travel Market

Canadian LGBTQ2+ travellers spend $12 billion per year on travel

The 2SLGBTQIA+ community demonstrates an affinity for indulging in travel experiences, with travel budgets that surpass those of the average globetrotter. Canadian 2SLGBTQIA+ travellers have income that surpasses the general population, they tend to have higher discretionary income. 28% of Canadian LGBTQ2+ travellers have income higher than $100,000, and close to half of those spend over $2,000 per leisure trip 3-4 times per year. On average, they spend $1,855 per trip compared to $265 per trip for the general travelling public. There's a difference regionally as well - per trip, LGBTQ2+ travellers from British Columbia spend an average of $1,980, Albertans spend $1,975, and Ontarians spend $1,826. Considering travelling is not an essential expenditure, we can assume that this community has additional income that can be allocated to more lavish experiences. This presents an exceptional opportunity for advertisers to effectively engage with and gain visibility amongst this affluent audience - especially in tourist activities such as shopping, dining and entertainment.

Top 9 LGBTQ2+ Tourism Activities of Choice:



Ways to engage with the 2SLGBTQIA+ community

Before we discuss engaging with this community through advertising, it is extremely important to be cognizant of going beyond the surface. Cassius Naylor, co-director of advocacy of Outvertising which is an industry advocacy group, states the following as guidance for brands looking to engage with this audience.

"Let's be clear: inclusive copy and rainbow logos alone do not change the world. They don't make queer people safer or our lives fairer and more prosperous. Everyone knows how to talk the talk these days, but meaning comes in walking the walk. So the prescription for real impact is simple: stand firm in your action.

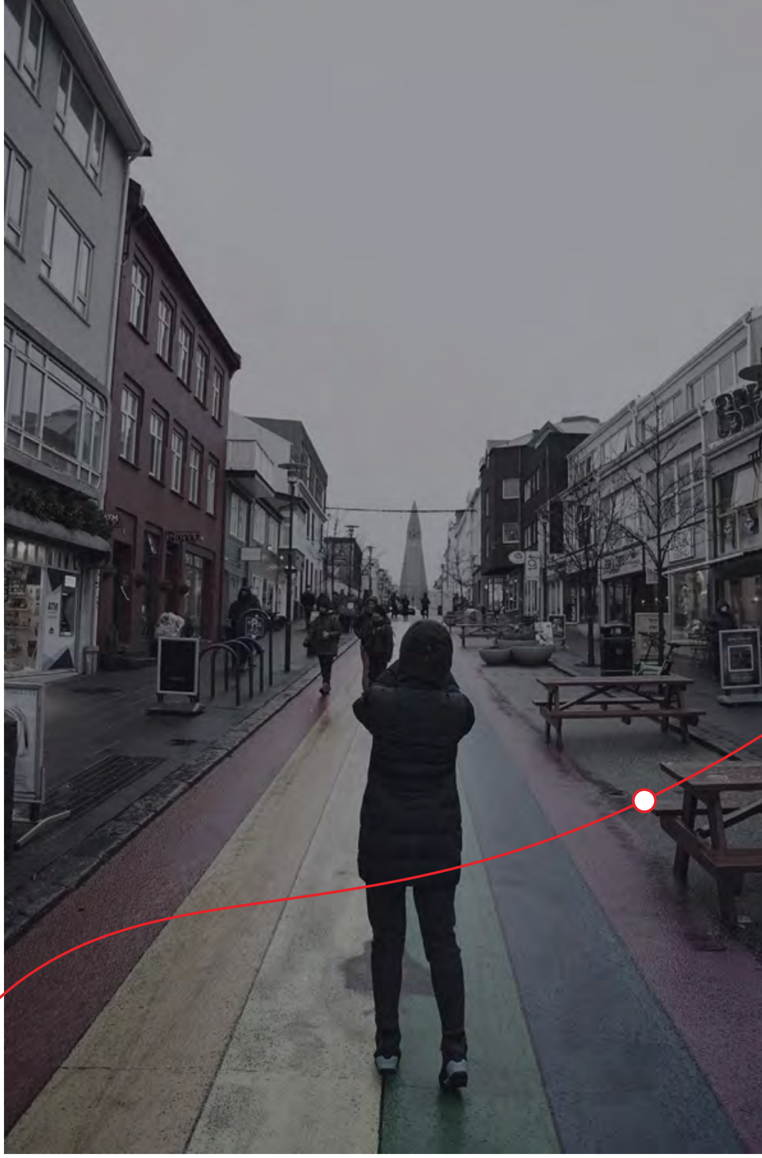
Campaign, lobby, agitate and caucus for the LGTBQ+ community. Use the strength of your investment and divestment to empower social justice and disempower those who are profiting from hate-mongering and disinformation. Real allyship is an act of courage."

***Cassius Naylor**, co-director of advocacy of Outvertising*

Canada's 2SLGBTQI+ Chamber of Commerce (CGLCC) discusses their six essential elements for success for crafting a marketing strategy to engage with this community in a multitude of steps.

1. **Engage with the community before starting your marketing strategy.** Make sure you have already identified and empowered one or more local leaders in this space prior to your campaign strategy development. The inclusion of one or more senior representatives from the 2SLGBTQIA+ community is essential to steer the process, ensure authenticity, foster community engagement, provide sustained leadership, and achieve positive outcomes. Their involvement will contribute to the long-term success and sustainability of the program.
2. **Have an engaged and visible local community.**
3. **Build collaborative local, regional and broader partnerships.**
4. **Provide dedicated investment and support.**
5. **Offer unique products and experiences.**

6. **Implement inclusive marketing strategies and promotional activities.**
    a. Demonstrate authenticity in all marketing and communications by featuring 2SLGBTQIA+ individuals, stories and imagery in both general and targeted campaigns on all platforms;
    b. Encourage affiliations with local, national and/or international LGBT+ tourism organizations who offer additional resources, support and marketing tools;
    c. Feature 2SLGBTQIA+ information, imagery, package details and relevant web links in general marketing and promotional campaigns and platforms.



To understand these steps in more detail, visit Canada's 2SLGBTQI+ Chamber of Commerce (CGLCC) and read "An LGBT+ Travel Market Guide & Tourism Development Toolkit."

Engaging with this community goes beyond the billboard. It's important to champion and both internally and externally support the 2SLGBTQIA+ community through initiatives, partnerships and supporting local organizations and charities. Merely including 2SLGBTQIA+ messaging in advertising strategies without integrating it into a company's core objectives and values risks being perceived as inauthentic and may not be genuinely embraced by the 2SLGBTQIA+ community.

Thankfully, there are brands that do this right. **Ben and Jerry's** to some is considered the 'Pride Month Blueprint' with their 2SLGBTQIA+ support that spans across the entirety of the year - not just pride month.

Three notable areas in which the Ben and Jerry's company focuses their efforts in this space is the following:

The brand is both reactive and proactive, ensuring they are always two steps ahead when it comes to advocacy.

Ben and Jerry's

1. **At Ben and Jerry's, Pride Is 365 Days a Year.** As stated above, this company does not only focus their efforts during Pride Month, and they are proactive with launching campaigns related to supporting the 2SLGBTQIA+ community throughout the entire year.
2. **They Put Their Money Where Their Mouth Is.** Ben and Jerry's doesn't just talk the talk. When it comes to social issues, their core company values include supporting the rights of the 2SLGBTQIA+ folks, by offering their largest resource: money.
3. **They Connect with 2SLGBTQIA+ People.** Ben and Jerry's co-founders joined queer individuals and allies during an anti-discrimination event. By collaborating with knowledgeable individuals and organizations, they demonstrate a commitment to consistent advocacy beyond a limited timeframe, establishing themselves as a pioneering force for change in the lives of those in the 2SLGBTQIA+ community.

Prideful Billboard Campaigns

PRIDE Month billboards to combat 'disturbing' rise in visible hate

OUTFRONT

Celebrates PRIDE Month with '15 Seconds of Fabulous' OOH Campaign

LCBO #ToastToPride

Special thanks to our contributors:

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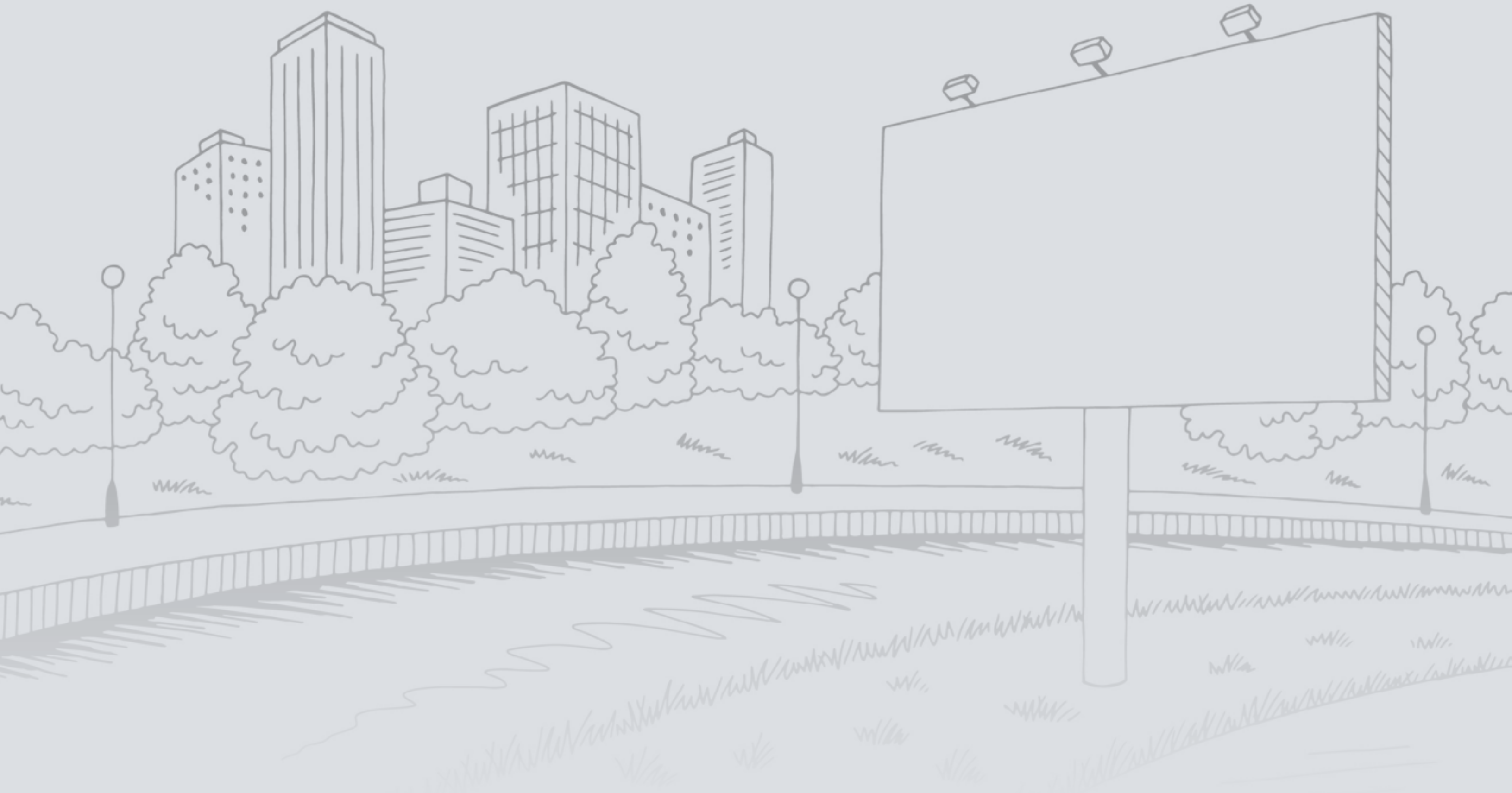

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