PREPARED BY:

CMDC CANADIAN MEDIA DIRECTORS' COUNCIL

PUBLISHED BY:

MARKETING

Canadian Media Directors' Council

MEDIA DIGEST 10|11

CELEBRATING 40 YEARS

PUBLICATIONS MAIL AGREEMENT 40070230 POSTAGE PAID IN TORONTO MARKETING MAGAZINE, ONE MOUNT PLEASANT ROAD, TORONTO, CANADA M4Y 2Y5

DISPLAY UNTIL FEBRUARY 28, 2011

$19.95

SEPTEMBER 27, 2010

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Letter from the President
Canadian Media Directors' Council

Welcome readers,

The Canadian Media Directors' Council is celebrating the 40th anniversary of the Media Digest with the publication of this 2010/11 issue you are accessing. Forty years is quite an achievement of consistently providing *the* comprehensive source of key trends and details on the full media landscape in the Canadian marketplace. Fascinating to consider how the media industry has evolved over those forty years and how the content of the Digest has evolved along with the industry.

As our industry has transformed and instant digital access has become such an important component of any reference source, we are pleased to make the Digest and its valuable and unique reference information freely available to the industry online at www.cmdc.ca and www.marketingmag.ca, in addition to the hard copies distributed through Marketing Magazine and our member agencies.

The CMDC member agencies play a crucial role in updating and reinventing the Digest content on a yearly basis, and we thank each agency for their contribution. The 2010/11 edition was chaired by Fred Forster, president & CEO of PHD Canada and produced by Margaret Rye, the CMDC Digest administrator. The successful and timely delivery of the Media Digest to the industry each year is due in large part to Margaret Rye's level of commitment and stewardship. Special thanks to Margaret and Fred for their coordination of all the Digest components and their collaborative working style with all of the contributors.

Marketing Magazine has been the CMDC's long term partner in publishing the Media Digest. Our thanks to our partner editorial and sales team at Marketing. As our industry has been undergoing transformative change, the CMDC values Marketing's continued commitment to the importance of providing consolidated, relevant reference material to the media and marketing communities.

We must also thank our advertisers–their continuing support enables us to fund and publish the Digest on an annual basis.

The CMDC's mission is to further the advancement of media and communications in Canada, and the Media Digest continues to be an important element of our delivering against that mission. We welcome the positive response and feedback from our readers who make good use of its valuable multi-media content.

Anne Myers
President, CMDC

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The CMDC Media Digest is not intended to be a comprehensive directory of available media in Canada. For specific media information and rates, we refer you to Canadian Advertising Rates and Data (CARD), or to the relevant sales force.

Additional copies may be obtained for $25 ($40 outside Canada) from
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Publication mail agreement #40070230
Registration number 08985

Periodicals postage paid at Lewiston, NY.
Canadian and U.S. Postmasters: send address changes to Marketing Magazine, PO Box 18003 Toronto, ON M7Y 3J3.

Undeliverable copies notices to:
Marketing Magazine, One Mount Pleasant Rd., 7th Floor, Toronto, ON M4Y 2Y5,
duncan.palmer@rci.rogers.com.

U.S. periodical registration no. 010-574

Marketing is indexed in the Canadian Business Index by Micromedia Limited. Back copies are available in microform from Micromedia Limited, 20 Victoria St., Toronto, ON M5C 2N8, tel: (416) 362-5211; and from the University of Michigan Micro Films International, 300 North Zeeb Rd., Ann Arbor, MI, 48106. Marketing, USPS 010-574 is published weekly by Rogers Media. U.S. office of publication: 2221 Niagara Falls Blvd., Niagara Falls, NY 14304-5709. Periodicals Postage Paid at Niagara Falls, NY. U.S. postmaster: Send address changes to Marketing, PO Box 4541, Buffalo, NY 14240. ISSN #1196-4650

102nd Year—Vol. 115—No. 13

Single copy sales only (416) 764-1620

Current issue (in Canada) $5.95 plus GST and postage and handling (P&H). Back issues $10 plus GST and P&H. Outside Canada $10 plus P&H.

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Printed in Canada. Member Canadian Business Press and Audit Bureau of Circulations.
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Marketing is published 18 times a year except for occasional combined, expanded or premium issues, which count as two subscription issues. *Marketing*, established in 1908, is published by Rogers Publishing Limited, a division of Rogers Media Inc.

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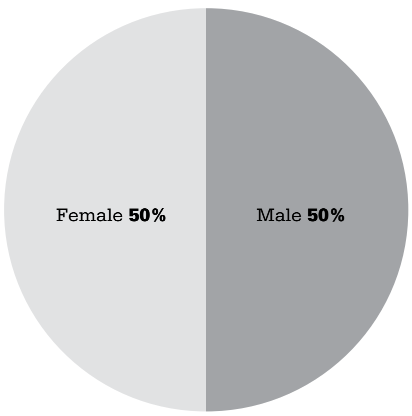
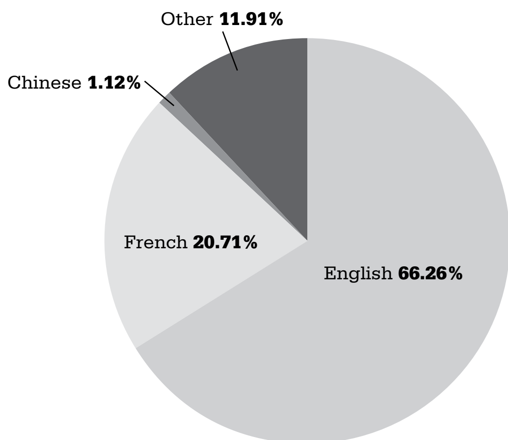
Canadian Market Data

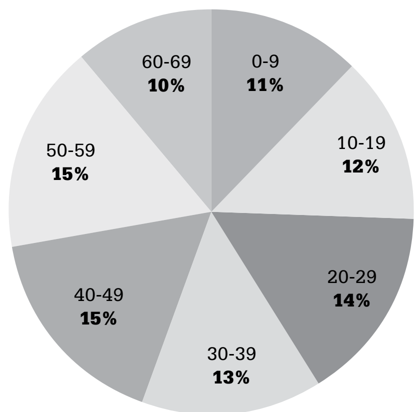
% Population by Sex



Home Language
(All of Canada)



Total % Population by Age



Source: FPmarkets – Canadian Demographics 2009

The Canadian Market – Provincial Data

Markets	2009 Est. Pop. (000)	'06 Census Pop. (000)	2009 % Canada	% Change '06-'09	Households '09 Est. (000)	Households % Canada	Retail $ '09 Est. Millions	% Canada	Retail $ Per HH	Market Rating Index
Newfoundland & Labrador	507.8	510.3	1.50	-0.48	203.5	1.50	6,961.9	1.63	34,200	109
Prince Edward Island	139.3	137.9	0.41	1.02	55.5	0.41	1,695.7	0.40	30,500	96
Nova Scotia	952.2	938.0	2.81	1.52	399.9	2.96	12,173.5	2.85	30,400	101
New Brunswick	755.7	745.7	2.23	1.34	312.0	2.31	9,836.9	2.30	31,500	103
Quebec	7,925.1	7,631.5	23.37	3.85	3,385.9	25.03	96,690.0	22.60	28,600	97
Ontario	13,137.7	12,665.4	38.74	3.73	4,997.9	36.94	151,876.7	35.50	30,400	92
Manitoba	1,222.6	1,184.0	3.69	3.26	481.1	3.56	14,989.1	3.50	31,200	97
Saskatchewan	1,020.6	992.1	3.01	2.88	410.7	3.04	14,062.8	3.29	34,200	109
Alberta	3,668.4	3,421.3	10.82	7.22	1,428.3	10.56	60,994.1	14.26	42,700	132
British Columbia	4,474.9	4,243.6	13.19	5.45	1,815.5	13.42	57,034.2	13.33	31,400	101
Northwest Territories	44.1	43.2	0.13	2.02	15.5	0.11	711.5	0.17	45,900	128
Nunavut	32.0	30.8	0.09	3.92	8.7	0.06	308.0	0.07	35,400	76
Yukon Territory	33.7	32.3	0.10	4.55	14.4	0.11	534.5	0.12	37,000	126
Canada	33,914.2	32,576.1	100.00	4.11	13,528.9	100.0	427,969.8	100.0	31,600	100

Source: FPmarkets – Canadian Demographics 2010

Markets with Populations of 100,000 and Over

		HOUSEHOLDS				RETAIL SALES		
Markets	2008 Est. Pop. (000)	2008 % Canada	% Change '06-'08	Total HH at July 1 (000)	Retail $ Millions	% Canada	$ Per Capita	Market Rating Index
Toronto, CMA	5,667.1	14.96	7.99	2,023.6	59,434.8	13.89	10,500	83
Montreal, CMA	3,850.5	12.03	5.44	1,627.6	45,593.6	10.66	11,800	94
Vancouver, CMA	2,330.0	6.76	8.54	914.4	26,902.2	6.29	11,500	92
Ottawa-Gatineau, CMA	1,220.6	3.66	6.62	494.5	13,403.1	3.13	11,000	87
Calgary, CMA	1,219.7	3.55	11.13	480.4	18,493.9	4.32	15,200	120
Edmonton, CMA	1,149.6	3.41	9.86	461.4	18,696.4	4.37	16,300	129
Quebec, CMA	756.3	2.50	5.70	338.2	10,037.3	2.35	13,300	105
Winnipeg, CMA	741.8	2.25	4.86	304.2	8,670.1	2.03	11,700	93
Hamilton, CMA	740.3	2.14	4.93	289.5	7,805.9	1.82	10,500	84
Kitchener, CMA	493.2	1.41	7.82	190.1	5,773.8	1.35	11,700	93
London, CMA	490.9	1.50	5.81	203.2	6,171.5	1.44	12,600	100
Halifax, CMA	407.0	1.28	8.15	172.8	4,868.0	1.14	12,000	95
St. Catharines - Niagara, CMA	405.2	1.21	1.83	164.3	5,019.3	1.17	12,400	98
Oshawa, CMA	361.3	0.99	8.43	134.1	4,108.6	0.96	11,400	90
Victoria, CMA	354.9	1.17	6.27	158.5	3,998.8	0.93	11,300	89
Windsor, CMA	336.5	0.99	2.23	133.5	3,604.6	0.84	10,700	85
Saskatoon, CMA	256.3	0.79	9.09	106.6	3,631.0	0.85	14,200	112
Regina, CMA	209.2	0.65	6.52	87.5	3,006.1	0.70	14,400	114
Sherbrooke, CMA	196.2	0.65	5.87	88.5	2,788.7	0.65	14,200	113
Barrie, CMA	192.8	0.53	7.64	71.1	2,845.8	0.67	14,800	117
St. John's, CMA	190.2	0.56	6.87	76.3	2,858.7	0.67	15,000	119
Kelowna, CMA	188.5	0.58	14.54	78.7	2,492.0	0.58	13,200	105
Abbotsford-Mission, CMA	175.3	0.46	8.74	62.7	2,255.9	0.53	12,900	102
Greater Sudbury, CMA	165.5	0.51	3.09	69.5	2,354.9	0.55	14,200	113
Kingston, CMA	160.2	0.49	4.12	66.8	2,153.3	0.50	13,400	107
Saguenay, CMA	152.9	0.48	1.52	65.6	2,253.7	0.53	14,700	117
Trois Rivieres, CMA	146.9	0.50	4.82	67.3	2,241.5	0.52	15,300	121
Brantford, CMA	139.0	0.40	4.06	53.5	1,543.2	0.36	11,100	88
Guelph, CMA	137.4	0.40	7.55	54.5	1,465.0	0.34	10,700	85
Moncton, CMA	137.3	0.42	8.12	57.1	2,081.8	0.49	15,200	120
Saint John, CMA	127.4	0.38	3.43	51.7	1,594.4	0.37	12,500	99
Thunder Bay, CMA	123.9	0.39	0.02	53.0	1,873.7	0.44	15,100	120
Peterborough, CMA	121.9	0.37	3.43	49.7	1,674.1	0.39	13,700	109
Chatham-Kent, CA	111.1	0.33	0.17	45.2	1,833.1	0.43	16,500	131
Lethbridge, CA	106.0	0.31	10.18	42.5	2,176.1	0.51	20,400	162
Cape Breton, CA	105.6	0.32	-0.34	43.6	1,419.3	0.33	13,400	107
Kamloops, CA	100.8	0.31	8.38	42.3	1,830.2	0.43	18,200	144

Source: FPmarkets – Canadian Demographics 2010

Cultural Diversity – 100,000+ Markets – Percentage of Population

Home Language	St. John's	Halifax	Cape Breton	Moncton	Saint John	Saguenay*	Montreal	Ottawa-Gatineau	Quebec City	Sherbrooke	Trois-Rivières	Barrie	Guelph	Hamilton	Kingston	Kitchener
English	98.76	95.96	96.87	68.23	96.33	0.49	16.32	59.73	1.02	4.39	0.50	95.32	88.84	87.42	94.43	86.15
French	0.10	1.01	0.22	30.08	1.58	98.83	68.38	29.00	97.12	92.15	98.13	0.68	0.59	0.42	1.35	0.36
Amharic	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0.06
Arabic	0.06	0.56	-	-	-	0.10	1.43	1.52	0.10	0.16	0.10		0.19	0.71	0.14	0.51
Armenian	-	-	-	-	-	-	0.33	-	-	-	-	-	-	-	-	0.06
Bengali	-	-	-	-	-	-	0.21	0.15	-	-	-	-	0.10	0.09	-	-
Bosnian	-	-	-	-	-	-	-	-	0.12	-	-	-	-	0.13	-	0.09
Bulgarian	-	-	-	-	-	-	0.10	0.05	-	-	-		-	-	-	-
Cantonese	0.06	-	-	-	0.08	-	0.21	0.34	-	-	-	0.10	0.34	0.19	0.20	0.21
Chinese, n.i.e*	0.19	0.26	0.17	0.08	0.48	-	0.98	1.00	0.05	0.11	-	0.15	0.96	0.61	0.50	0.84
Cree	-	-	-	-	-	-	0.09	-	-	-	-	-	-	-	-	-
Creoles	-	-	-	-	-	-	0.45	0.09	-	-	-	-	-	-	-	-
Croatian	-	-	-	-	-	-	-	-	-	-	-	-	0.09	0.42	-	0.28
Czech	-	-	-	-	-	-	-	-	-	-	-	-	-	0.06	-	0.06
Dutch	-	-	-	-	-	-	-	-	-	-	-	-	-	0.05	-	0.06
Finnish	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
German	-	0.07	0.08	0.05	-	-	0.05	0.08	-	-	-	0.18	0.18	0.13	0.09	0.83
Greek	-	0.11	-	-	0.09	-	0.62	0.06	-	-	0.07	-	0.05	0.12	0.14	0.15
Gujarati	-	-	-	-	-	-	0.11	-	-	-	-	-	0.11	0.07	0.06	0.18
Hebrew	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Hindi	-	-	-	-	-	-	-	0.10	-	-	-	-	0.09	0.08	-	0.14
Hungarian	-	-	-	-	-	-	0.06	0.06	-	-	-	0.06	0.65	0.22	-	0.11
Italian	-	-	-	0.09	-	-	1.32	0.34	-	-	-	0.22	0.74	1.09	0.07	0.14
Japanese	-	0.05	-	-	-	-	-	-	-	-	-		-	-	-	-
Khmer (Cambodian)	-	-	-	-	-	-	0.13	0.06	-	-	-	-	-	0.08	-	0.05
Korean	-	0.16	-	-	0.07	-	0.08	0.09	-	-	-	0.11	0.10	0.23	0.09	0.25
Kurdish	-	-	-	-	-	-	-	-	-	-	-	-	-	0.06	-	-
Lao	-	-	-	-	-	-	0.07	-	-	-	-	-	0.08	-	-	0.16
Macedonian	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0.06
Mandarin	-	0.09	-	-	0.14	-	0.16	0.35	-	-	-	0.08	0.27	0.22	0.19	0.24
Micmac	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Mi'kmag	-	-	2.02	-	-	-	-	-	-	-	-	-	-	-	-	-
Montagnais-Naskapi	-	-	-	-	-	-	0.05	-	-	-	-	-	-	-	-	-
Panjabi (Punjabi)	-	-	-	-	-	-	0.24	0.16	-	-	-	0.08	0.55	0.69	0.07	0.58
Pashto	-	-	-	-	-	-	-	-	-	-	-	-	0.11	-	-	0.11
Persian (Farsi)	-	0.12	-	-	0.18	-	0.25	0..35	-	0.31	-	0.10	0.36	0.25	0.09	0.48
Polish	-	0.17	0.07	-	-	-	0.18	0.24	-	-	-	0.51	0.67	0.81	0.10	0.68
Portuguese	-	-	-	-	-	-	0.36	0.28	0.05	-	-	0.12	0.09	0.60	0.54	1.17
Romanian	-	-	-	0.05	-	-	0.51	0.17	0.08	-	-	-	0.12	0.20	-	0.60
Russian	0.06	0.06	-	-	0.08	-	0.38	0.32	-	-	-	.014	0.13	0.16	0.08	0.18
Serbian	-	-	-	-	-	-	-	0.11	-	0.18	-	-	0.28	0.55	-	0.75
Serbo-Croation	-	-	-	-	-	-	-	0.08	-	0.18	-	-	-	-	-	0.07
Slovak	-	-	-	-	-	-	-	-	-	-	-	0.06	-	0.07	-	-
Somali	-	-	-	-	-	-	-	0.35	-	-	-	-	-	0.07	-	0.06
Spanish	0.18	0.11	-	-	0.13	0.13	1.60	0.61	0.37	0.86	0.31	0.39	0.57	0.60	0.29	0.81
Tagalog (Pilipino, Filipino)	-	-	-	-	-	-	0.17	0.15	-	-	-	0.08	0.32	0.18	0.06	0.11
Tamil	-	-	-	-	-	-	0.28	0.13	-	-	-	-	0.14	-	-	0.06
Turkish	-	-	-	-	-	-	0.11	0.08	-	-	-	-	-	0.09	-	0.09
Ukrainian	-	-	-	-	-	-	-	-	-	-	-	-	-	0.17	0.09	-
Urdu	0.05	0.06	0.11	-	-	-	0.20	0.22	-	0.05	-	0.19	0.17	0.32	0.09	0.32
Vietnamese	-	0.08	0.07	-	-	-	0.52	0.47	0.08	0.08	0.08	0.15	0.77	0.39	0.14	0.59
Yiddish	-	-	-	-	-	-	0.13	-	-	-	-	-	-	-	-	-
Multiple Responses	0.14	0.55	0.21	0.98	0.42	0.28	3.21	2.43	0.55	1.01	0.48	0.76	1.57	1.70	0.77	1.66
Other	0.41	0.59	0.17	0.45	0.41	0.17	0.70	0.87	0.46	0.53	0.33	0.54	0.78	0.80	0.44	0.69

Source: FPmarkets – Canadian Demographics 2010

• n.i.e refers to the combination of Chinese languages not specified elsewhere

Media Cross-Ownership 2010

Media Company	Postmedia Network Inc.	Shaw/Canwest*	Astral	CTV Globemedia	Rogers Media	CBC	Corus	Quebecor	Pattison	RNC Media	Torstar	Transcon. Media
TV Networks		1		1		2		1	3			
TV Conventional		16	2	28	10	26	3	10		5		
TV Specialty/Digital		21	20	30		5	13	6			1	
Radio Stations			83	34	51	80	58		29	16		
Daily Newspapers	13			1				25			13	12
Non-Daily Newspapers	26							238			101	170
Consumer/Trade Magazines		4		1	73			53			6	50
Outdoor/Indoor Facings			7,831						19,183			

** The sale of Canwest TV assets to Shaw Communications is subject to final CRTC approval. A decision, expected in Sept. 2010, is unavailable at press time.*

About Costs

The Media Digest is a comprehensive source of industry data and information. However, this year's edition purposely excludes published advertising rates or costs associated with individual vehicles. This is a departure from previous Digests where rates were provided against some media but not others. We have made this change to the Digest for consistency and in recognition of the fact that published rates, where they exist, are rarely reflective of the actual price paid by the media practitioner.

In general, media planners and buyers identify the best media and approach to achieve an advertiser's communication objectives, establish planned costs based on historical information and/or market experience and negotiate with suppliers to achieve the best possible value.

Basic media currencies such as Cost-per-Rating point (CPR) and Cost-per-Thousand impressions (CPM), using established industry audience measurement tools, are deployed by the media professional to establish benchmarks and relative efficiencies among competing suppliers. However, qualitative parametres also play an important role in the analytics and negotiation of the components of a media campaign, as does the value placed on the integration of multiple assets.

Cultural Diversity – 100,000+ Markets – Percentage of Population cont'd

Home Language	London	Oshawa	Peterborough	St. Catharines-Niagara	Sudbury	Thunder Bay	Toronto	Windsor	Winnipeg	Regina	Saskatoon	Calgary	Edmonton	Kelowna	Abbotsford	Vancouver	Victoria
English	90.00	94.26	97.39	91.40	80.22	94.91	69.17	85.09	87.62	95.54	95.26	84.87	88.23	95.05	81.25	70.59	93.94
French	0.39	0.85	0.31	1.24	16.29	0.89	0.49	0.93	1.85	0.52	0.32	0.45	0.69	0.37	0.27	0.38	0.46
Akan (Twi)	-	-	-	-	-	-	0.11	-	-	-	-	-	-	-	-	-	-
Amharic	-	-	-	-	-	-	0.05	-	0.12	-	-	0.11	0.05	-	-	-	-
Arabic	1.03	0.11	-	0.26	-	-	0.63	1.98	0.17	0.21	0.26	0.46	0.41	-	-	0.18	-
Armenian	-	-	-	-	-	-	0.15	0.06	-	-	-	-	-	-	-	-	-
Bengali	-	-	-	-	-	-	0.35	0.09	-	-	-	0.13	-	-	-	-	-
Bosnian	0.08	-	-	-	-	-	-	0.07	-	-	-	0.05	-	-	-	-	-
Bulgarian	-	-	-	0.07	-	-	0.09	-	-	-	-	0.05	-	-	-	-	-
Cantonese	0.19	0.12	0.07	0.11	-	0.06	2.86	0.25	0.28	0.17	0.19	1.29	0.99	0.09	0.18	4.90	0.56
Chinese, n.i.e*	0.49	0.23	0.11	0.35	0.13	0.18	2.58	1.11	0.58	0.57	0.65	1.78	1.42	0.21	0.41	4.33	0.89
Cree	-	-	-	-	-	-	-	-	-	-	0.13	-	-	-	-	-	-
Creole	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Croatian	0.09	-	-	0.14	0.07	0.08	0.16	0.28	0.09	-	-	0.06	-	-	-	0.10	0.05
Czech	-	-	-	-	-	-	-	-	-	-	-	-	-	0.08	-	-	-
Dutch	0.06	-	0.07	0.06	-	-	-	-	-	-	-	-	-	-	0.13	-	-
Finnish	-	-	-	-	0.28	0.56	-	-	-	-	-	-	-	0.17	-	-	0.06
German	0.19	-	0.08	0.38	-	0.06	0.10	0.15	0.55	0.18	0.38	0.12	0.22	0.78	0.80	0.15	0.15
Greek	0.16	0.10	-	0.07	-	-	0.38	0.13	0.07	0.12	0.07	-	-	-	-	0.10	-
Gujarati	-	0.11	0.07	-	0.05	-	0.71	0.20	0.06	-	-	0.21	0.12	-	-	0.13	-
Hebrew							0.10										
Hindi	0.09	-	-	-	-	-	0.38	0.12	0.07	-	0.07	0.18	0.27	0.07	0.09	0.54	-
Hungarian	0.12	0.11	-	0.16	-	-	0.13	0.16	-	-	-	0.08	-	0.21	0.08	0.10	-
Ilocano	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Italian	0.26	0.37	0.15	1.24	0.82	1.13	1.42	1.17	0.21	-	-	0.11	0.17	0.15	-	0.22	0.08
Japanese	-	-	-	-	-	-	0.08	-	-	-	-	0.09	-	0.11	0.08	0.38	0.20
Khmer (Cambodian)	0.10	-	-	-	-	-	-	0.09	-	-	-	-	-	-	-	-	-
Korean	0.32	0.09	0.17	0.17	-	-	0.77	0.13	0.23	0.09	-	0.49	0.24	0.11	0.90	1.78	0.24
Kurdish	0.10	-	-	-	-	-	-	-	-	-	-	-	-	-		-	-
Lao	-	-	-	0.11	-	-	-	-	0.08	-	-	-	-	-	0.06	-	-
Macedonian	-	0.06	-	-	-	-	0.12	0.23	-	-	-	-	-	-	-	-	-
Malay	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0.07	-
Malayalam	-	-	-	-	-	-	0.06	-	-	-	-	-	-	-	-	-	-
Mandarin	0.15	0.07	0.13	0.07	-	-	1.04	0.18	0.15	0.15	0.06	0.59	0.27	-	0.18	2.87	0.32
Micmac	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Montagnais-Naskapi-		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Ojibway	-	-	-	-	-	0.10	-	-	-	-	0.06	-	-	-	-	-	-
Oji-Cree	-	-	-	-	-	0.09	-	-	-	-	-	-	-	-	-	-	-
Panjabi (Punjabi)	0.09		-	0.06	-	-	2.12	0.58	0.66	0.19	0.09	1.55	1.03	0.65	12.11	4.30	0.68
Pashto	-	-	-	-	-	-	0.06	-	-	-	-	-	-	-	-	-	-
Persian (Farsi)	0.21	0.24	-	-	-	-	0.94	0.13	0.14	0.10	0.13	0.31	0.17	-	0.05	0.31	0.09
Polish	0.88	0.52	0.28	0.40	0.14	0.38	0.87	0.57	0.46	0.06	0.07	0.34	0.40	0.19	0.07	0.26	0.16
Portuguese	0.74	0.20	-	-	0.05	0.10	1.07	0.10	0.39	-	-	0.09	0.15	0.06	-	0.14	0.14
Romanian	0.09	0.10	-	-	-	-	0.29	0.46	-	-	-	0.14	0.07	-	0.11	0.14	-
Russian	0.18	0.08	-	0.13	-	-	1.00	0.11	0.25	-	-	0.36	0.18	0.07	0.14	0.38	0.11
Serbian	0.14	0.08	-	0.28	-	-	0.26	0.48	0.07	-	-	0.11	0.07	-	-	0.18	-
Serbo-Croation	0.08	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Sindhi	-	-	-	-	-	-	0.05	-	-	-	-	-	-	-	-	-	-
Sinhala (Sinhalese)	-	-	-	-	-	-	0.05	-	-	-	-	-	-	-	-	-	-
Somali	-	-	-	-	-	-	0.16	-	0.05	0.05	-	-	-	-	-	-	-
Slovak	-	-	-	-	-	-	-	0.08	-	-	-	-	-	-	-	-	-
Somali	-	-	-	-	-	-	-	0.05	-	-	-	-	0.11	-	-	-	-
Spanish	1.13	0.25	0.18	0.86	-	0.06	1.30	0.45	0.54	0.19	0.24	0.76	0.49	0.09	0.45	0.68	0.23
Tagalog (Pilipino, Filipino)	0.08	0.12	-	0.10	-	-	1.05	0.23	1.79	0.11	0.13	0.74	0.54	-	-	1.03	0.16
Tamil	-	0.13	-	-	-	-	1.46	-	-	-	-	-	-	-	-	0.10	-
Telugu	-	-	-	-	-	-	0.05	-	-	-	-	-	-	-	-	-	-
Turkish	-	-	-	0.05	-	-	0.13	0.11	-	-	-	-	-	-	-	-	-
Ukrainian	0.08	0.18	-	0.17	0.14	0.14	0.25	-	0.32	-	0.17	-	0.16	-	-	-	-
Urdu	0.15	0.13	-	0.08	-	-	1.40	0.37	0.10	-	0.05	0.49	0.22	-	-	0.21	-
Vietnamese	0.36	0.10	0.08	0.16	-	0.10	0.72	0.42	0.32	0.35	0.15	0.72	0.53	0.20	0.47	0.73	0.11
Yiddish	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Multiple Responses	1.18	0.91	0.33	1.12	1.30	0.63	3.70	2.11	1.79	0.68	0.61	1.92	1.74	0.92	1.66	3.00	0.77
Other	0.79	0.49	0.58	0.73	0.52	0.55	1.13	1.37	0.97	0.71	0.92	1.35	1.05	0.41	0.52	1.12	0.59

Source: FPmarkets – Canadian Demographics 2010 • n.i.e refers to the combination of Chinese languages not specified elsewhere

Cultural Diversity – 100,000+ Markets – Percentage of Population cont'd

Home Language	Brantford	Lethbridge	Chatham-Kent	Kamloops	National
English	94.27	94.65	94.06	96.24	66.26
French	0.30	0.31	0.61	0.10	20.71
Akan (Twi)	-	-	-	-	0.02
Algonquin	-	-	-	-	0.00
Amharic	-	-	-	-	0.03
Arabic	0.09	-	0.18	-	0.46
Armenian	-	-	-	-	0.07
Atikamekw	-	-	-	-	0.02
Bengali	-	-	0.05	-	0.11
Bisayan Languages	-	-	-	-	0.02
Blackfoot	-	-	-	-	0.01
Bosnian	-	-	-	-	0.03
Bulgarian	-	-	-	-	0.04
Cantonese	-	0.10	-	0.24	0.98
Carrier	-	-	-	-	0.00
Chilcotin	-	-	-	-	0.00
Chinese, n.i.e•	0.13	0.44	0.07	0.33	1.12
Chipewyan	-	-	-	-	0.00
Cree	-	-	-	-	0.17
Creoles	-	-	-	-	0.07
Croatian	-	0.09	-	-	0.07
Czech	-	-	-	-	0.02
Danish	-	-	-	-	0.00
Dutch	0.05	0.44	0.12	-	0.04
Estonian	-	-	-	-	0.01
Finnish	-	-	-	-	0.01
Flemish	-	-	-	-	0.00
Frisian	-	-	-	-	0.00
German	0.11	1.33	1.96	0.25	0.37
Gitksan	-	-	-	-	0.00
Greek	-	-	0.20	-	0.17
Gujarati	-	-	-	-	0.17
Hebrew	-	-	-	-	0.03
Hindi	-	-	-	0.08	0.14
Hungarian	0.11	0.07	-	-	0.07
Ilocano	-	-	-	-	0.02
Inuinnaqtun	-	-	-	-	0.00
Inuktitut, n.i.e.	-	-	-	-	0.08
Italian	0.32	0.09	-	0.52	0.53
Japanese	-	0.07	-	0.09	0.06
Khmer (Cambodian)	-	-	-	-	0.04
Korean	0.14	-	0.13	0.12	0.34
Kurdish	-	-	-	-	0.02
Kutchin-Gwich'in (Loucheux)	-	-	-	-	0.00
Lao	-	-	0.09	-	0.03
Latvian	-	-	-	-	0.01

Home Language	Brantford	Lethbridge	Chatham-Kent	Kamloops	National
Lithuanian	-	-	-	-	0.01
Macedonian	-	-	-	-	0.03
Malay	-	-	-	-	0.01
Malayalam	-	-	-	-	0.02
Malecite	-	-	-	-	0.00
Maltese	-	-	-	-	0.00
Mandarin	0.12	-	-	-	0.47
Mi'kmag	-	-	-	-	0.01
Mohawk	-	-	-	-	0.00
Montagnais-Naskapi	-	-	-	-	0.04
Nisga'a	-	-	-	-	0.00
North Slave (Hare)	-	-	-	-	0.00
Norwegian	-	-	-	-	0.00
Ojibway	0.39	-	-	-	0.03
Oji-Cree	0.41	-	-	-	0.04
Panjabi (Punjabi)	0.42	-	0.07	0.62	0.94
Pashto	-	-	-	-	0.02
Persian (Farsi)	-	0.24	0.08	-	0.32
Polish	0.72	0.13	0.25	-	0.32
Portuguese	0.33	-	0.39	-	0.33
Romanian	0.09	-	0.10	-	0.16
Russian	-	-	-	-	0.30
Serbian	0.06	-	-	-	0.11
Serbo-Croatian	-	-	-	-	0.02
Shuswap	-	-	-	-	0.00
Sindhi	-	-	-	-	0.02
Sinhala (Sinhalese)	-	-	-	-	0.02
Siouan Languages (Dakota/Sioux)	-	-	-	-	0.01
Slovak	-	-	-	-	0.02
Slovenian	-	-	-	-	0.01
Somali	-	-	0.15	-	0.05
South Slave	-	-	-	-	0.00
Spanish	0.13	0.44	1.15	0.11	0.66
Swahili	-	-	-	-	0.01
Swedish	-	-	-	-	0.00
Tagalog (Pilipino, Filipino)	0.18	0.08	-	0.08	0.39
Tamil	-	-	-	-	0.30
Telugu	-	-	-	-	0.01
Tigrigna	-	-	-	-	0.01
Turkish	-	-	-	-	0.05
Ukrainian	-	0.05	-	-	0.09
Urdu	0.17				0.34
Vietnamese	0.29	0.16	0.15	0.07	0.36
Yiddish	-				0.02
Multiple Responses	0.73	0.71	0.74	0.52	1.84
Other	0.44	0.59	0.55	0.62	0.25

Source: FPmarkets – Canadian Demographics 2010 • n.i.e refers to the combination of Chinese languages not specified elsewhere

Net Advertising Volume by Medium (Canada – millions of dollars)

Reported Media Actuals		2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Television	Total	2,450	2,553	2,593	2,827	2,964	3,014	3,241	3,299	3,393	3,102
	National Spot	1,200	1,209	1,201	1,312	1,310	1,302	1,309	1,338	1,303	1,158
	Local Spot	428	418	386	389	383	385	393	407	400	356
	Network	425	469	480	503	544	538	633	581	641	570
	Specialty	381	438	509	607	708	769	882	948	1,026	1,000
	Infomercial	17	20	18	17	18	19	24	24	22	19
	Year On Year Change	3.4%	4.2%	1.6%	9.0%	4.8%	1.7%	7.5%	1.8%	2.9%	-8.6%
Daily Newspaper	Total	2,581	2,501	2,510	2,529	2,611	2,659	2,635	2,572	2,489	2,030
	National	592	574	576	580	599	610	605	590	571	466
	Local	1,139	1,104	1,108	1,116	1,152	1,174	1,163	1,135	1,099	896
	Classified	849	823	826	832	859	875	867	846	819	668
	Year On Year Change	6.3%	-3.1%	0.4%	0.7%	3.2%	1.9%	-0.9%	-2.4%	-3.2%	-18.4%
Radio	Total	1,001	1,048	1,080	1,171	1,209	1,316	1,390	1,468	1,558	1,469
	National	231	237	235	271	271	323	352	379	408	376
	Local	771	811	845	900	938	993	1,038	1,089	1,149	1,093
	Year On Year Change	5.1%	4.7%	3.0%	8.4%	3.3%	8.8%	5.6%	5.6%	6.1%	-5.7%
Internet	Total	98	86	176	237	364	562	900	1,241	1,602	1,746
	Search	-	-	-	-	-	-	343	478	602	
	Display	-	-	-	-	-	-	314	432	490	
Classifieds/Directories		-	-	-	-	-	-	223	305	480	
	Email	-	-	-	-	-	-	20	17	18	
	Video	-	-	-	-	-	-	Na	9	12	
	Year On Year Change	96.4%	-12.2%	104.7%	34.7%	53.6%	54.4%	60.1%	37.9%	29.1%	9.0%
General Magazines	Total	514	541	558	610	647	665	682	718	692	590
	Year On Year Change	11.7%	5.3%	3.1%	9.3%	6.1%	2.8%	2.6%	5.3%	-3.7%	-14.7%
Out-Of-Home	Total	263	281	273	284	302	344	370	422	463	416
	Year On Year Change	8.3%	6.9%	-2.8%	4.2%	6.4%	13.6%	7.7%	14.0%	9.8%	-10.1%
Total Reported Actual		6,907	7,010	7,191	7,658	8,097	8,560	9,218	9,719	10,196	9,354
	Year On Year Change		1.5%	2.6%	6.5%	5.7%	5.7%	7.7%	5.4%	4.9%	-8.3%
Unreported Media Estimates											
Catalogue/ Direct Mail	Total	1,255	1,264	1,285	1,383	1,490	1,532	1,608	1,639	1,661	1,479
Phone Directories	Total	1,029	1,046	1,060	1,121	1,168	1,208	1,256	1,280	1,298	1,155
Miscellaneous	Total	1,165	1,177	1,192	1,261	1,314	1,359	1,413	1,440	1,460	1,300
Total Unreported (Estimates)											
	Total	3,449	3,487	3,537	3,765	3,973	4,099	4,278	4,360	4,420	3,934
	Year On Year Change		1.1%	1.4%	6.5%	5.5%	3.2%	4.4%	1.9%	1.4%	-11.0%
Total Advertising											
		10,356	10,497	10,728	11,424	12,070	12,659	13,496	14,079	14,616	13,288
Year On Year Change			1.4%	2.2%	6.5%	5.7%	4.9%	6.6%	4.3%	3.8%	-9.1%
Population (Millions)		30.7	31.0	31.4	31.7	31.9	32.2	32.6	32.9	33.3	33.7
Per Capita											
Total Advertising		337	338	342	361	378	393	414	428	439	394

"All Figures Are Calender Year Apart From Broadcast Which Is Based On The Broadcast Calendar I.E. Sep.1St - Aug.31St.
Reported Actuals: Source Is Tvb With Breakouts Based On Tvb Estimates. Television: Crtc; Radio: Crtc; Daily Newspaper: Cna; General Magazine: Magazines Canada;
Outdoor: Estimate Based On Nmr Data; Internet: Iab (2009 Is An Estimated Figure With No Breakdown Available At Time Of Press);
Unreported Estimates: Source Is Tvb With 2009 Figures Projected From 2008 Using The Total Reported Year On Year Change. Direct Mail: Canada Post;
Phone Directories: Estimate Based On Last Report By Teledirect (1999); Miscellaneous: Includes Estimates For Community Newspaper, Trade & Other Print
; Population: Statistics Canada Mid-Year Population By Year; Figures In Red Represent Industry Estimates."

Net Advertising Volume
(Canadian $ Millions)

Share of Reported Media Actuals	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Television	35.5%	36.4%	36.1%	36.9%	36.6%	35.2%	35.2%	33.9%	33.3%	33.2%
Daily Newspaper	37.4%	35.7%	34.9%	33.0%	32.2%	31.1%	28.6%	26.5%	24.4%	21.7%
Radio	14.5%	15.0%	15.0%	15.3%	14.9%	15.4%	15.1%	15.1%	15.3%	15.7%
Internet	1.4%	1.2%	2.4%	3.1%	4.5%	6.6%	9.8%	12.8%	15.7%	18.7%
General Magazines	7.4%	7.7%	7.8%	8.0%	8.0%	7.8%	7.4%	7.4%	6.8%	6.3%
Out-of-Home	3.8%	4.0%	3.8%	3.7%	3.7%	4.0%	4.0%	4.3%	4.5%	4.5%

Growth of Advertising Revenue by Medium (2000 = 100)

Medium	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Television	100	104	106	115	121	123	132	135	138	127
Daily Newspaper	100	97	97	98	101	103	102	100	96	79
Radio	100	105	108	117	121	131	139	147	156	147
Internet	100	88	180	242	371	573	918	1266	1635	1782
General Magazines	100	105	109	119	126	129	133	140	135	115
Out-of-Home	100	107	104	108	115	131	141	160	176	158
Total Reported Media Actuals	100	101	104	111	117	124	133	141	148	135
Total Unreported Media Estimates	100	101	103	109	115	119	124	126	128	114
Total Advertising	100	101	104	110	117	122	130	136	141	128

All figures are calender year apart from Broadcast which is based on the broadcast calendar i.e. Sep.1st – Aug.31st.
Reported Actuals: Source is TVB with breakouts based on TVB estimates. Television: CRTC; Radio: CRTC; Daily Newspaper: CNA; General Magazine: Magazines Canada; Outdoor: Estimate based on NMR data; Internet: IAB (2009 is an estimated figure with no breakdown available at time of press); Unreported Estimates: Source is TVB with 2009 figures projected from 2008 using the Total Reported year on year change. Direct Mail: Canada Post; Yellow Pages: Estimate based on last report by TeleDirect (1999); Miscellaneous: includes estimates for Community Newspaper, Trade & Other Print; Population: Statistics Canada Mid-Year Population by Year.

Ethnic Media

ETHNIC MEDIA LANDSCAPE IN 2010

For decades, Canada has been the destination for immigrants from around the world.
New immigrants contribute significantly to Canadian population growth and it is predicted that one day they will become the sole source of that Canadian growth.
With the media landscape constantly evolving and demographics becoming more diverse, it is important that messages are communicated effectively.

Ethnic media in Canada are represented by more than 93 cultures in more than 389 different media outlets. Across Canada there are at least 100 different languages spoken in the home. The vast majority seek community specific information that connects them to their heritage and is often written in their native tongue.

Television – 40 Languages on 10 Analog and 79 Digital Stations
Analog Nationally: APTN (Aboriginal), and Vision TV (Arabic, South Asian).

Regionally: OMNI (stations in Toronto, Vancouver, Edmonton and Calgary), CJNT in Montreal, Telelatino (Italian & Spanish).

Digital Multicultural Channels: There are 79 ethnic stations including Fairchild (Cantonese & Mandarin), Talentvision (Chinese), Odyssey (Greek) and ATN (South Asian).

Radio – 69 languages aired on 67 stations

Big Players: CHIN AM & FM (Toronto), Fairchild Radio (Edmonton & Calgary), CJVB AM (Vancouver) and CFMB AM (Montreal).

Print – 42 language groups in 230 publications

Daily papers are published in three languages–Chinese (5 papers), Korean (2) and Punjabi (1). The remaining publications are issued weekly, bi-weekly or monthly.

Source: www.cardonline .ca

All Media Data Sources

CANADIAN ADVERTISING RATES AND DATA (CARD) is a directory of all the media in Canada. These media, which supply the necessary information to CARD, are listed by category and show details of rates, circulation, booking rules and mechanical data. CARD also includes details of advertising agency, rep house and media organization personnel. CARD Online (cardonline.ca) offers the same information via the Internet.

WELCOME TO THE TELEVISION SECTION OF THE 2010/2011 MEDIA DIGEST, providing essential information about the single largest (and growing) medium in use by Canada's marketing community.

Today's marketing and advertising professionals are faced with an increasingly complex media environment, and are exposed to countless reports regarding media efficacy trends. As such, the need for accredited information (such as is provided within the Media Digest) is greater than ever. The Television Bureau of Canada (TVB), one of the sources for this section, is dedicated to providing marketers with answers to questions about television advertising that extend beyond the scope of this Digest.

From ad receptivity and attentiveness to attitudes towards advertising and overall media effectiveness, TVB provides Canada's advertising professionals with recent research to aid them with their critical media decisions.

The best decisions are informed decisions, and no other medium can compare to the depth of information provided by television!

Television

DISTRIBUTION

TV markets	40[1]
Commercial TV stations	148
HHs with TV	99%[2]
HHs with satellite or cable	92%[3]
Average number of channels in HH	150[4]

CONSUMPTION

Daily reach	95%[5]
Average hours per week	27.4%[6]

[1] BBM Fall 2009 EM Statistics (diary + meter markets)
[2] TVB, TV Basics 2009-2010
[3] TVB, TV Basics 2009-2010
[4] Media Stats, April 2010
[5] Infosys PPM, Total Canada 2+, Aug. 31-Dec. 27, 2009
[6] Infosys PPM,. Total Canada 2+, Aug. 31-Dec. 27, 2009

GENERAL INFORMATION

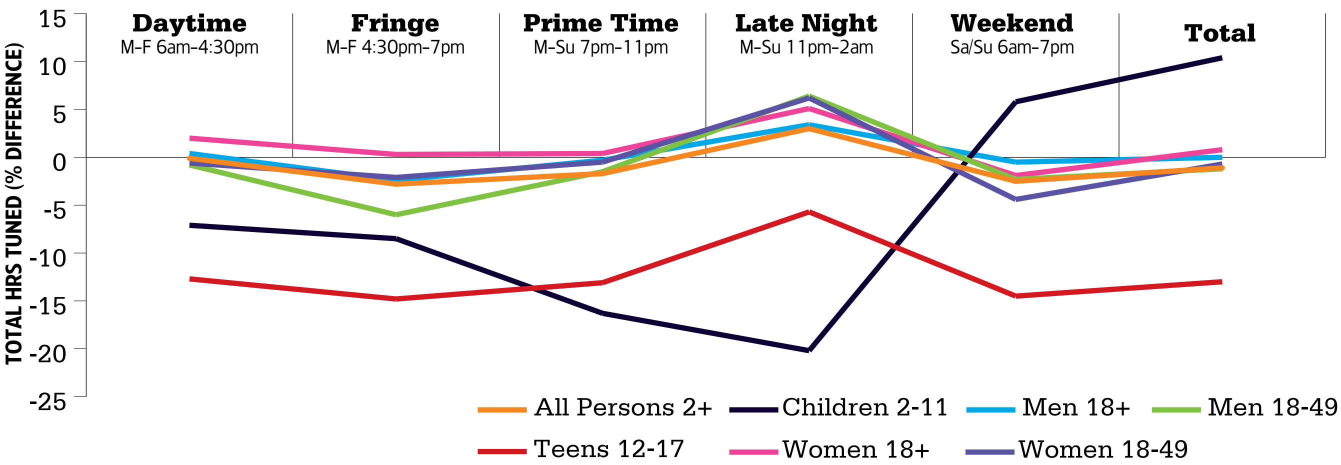
- 67% of Canadians live in multi-set households (TV Basics 2009-2010)
- 18% of households have PVRs, up from 14% in early 2009 (BBM Media Technology Trends, March 2010)
- Canadians spend 8.7% of their viewing time with US Stations [1]
- The average weekly viewing hours for Canadians 2+ is 27 hours and 4 minutes[2]
- 30-second commercial lengths are the most popular format for television advertising in Canada, representing 53% of all commercial time produced in Canada (TV Basics 2009-2010)

1. Not all US stations were encoded at the start of PPM measurement, so there has been a significant drop in measurement of time spent with US networks.
2. Infosys PPM, Total Canada 2+, Aug. 31-Dec. 27, 2009

NATIONAL NETWORKS

CBC TELEVISION A 24-hour English-language network for news, information, sports and entertainment programming produced by, for and about Canadians.
CTV CTV broadcasting signals cover 99% of English Canadian households through its owned-and-operated television stations across the country. CTV also owns A Atlantic, a Maritimes satellite service that reaches Newfoundland and Labrador.
GLOBAL A national network of stations airing news, information and entertainment programming.
RADIO-CANADA A French-language television network with popular and original programming, including news, current affairs, arts and culture and programs for children and youth.
TVA TVA is a private, French-language television network that produces and broadcasts entertainment and public affairs programming. TVA owns and operates six of the ten stations comprising the TVA Network and four affiliates. Two of those affiliates are owned by Télé Inter-Rives, in which TVA has a 45% ownership. TVA Network's signal reaches nearly the entire French-speaking audience in the province of Quebec and a significant portion of the French-speaking viewers in the rest of Canada.

TELEVISION SUMMER VIEWING DROP-OFF



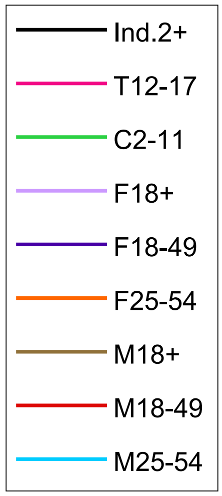
Source: Infosys National PPM, Fall 2009

VCR, DVD AND PVR PENETRATION

	VCR Reach %	VCR Share %	PVR Reach %	PVR Share %	VCR Penetration%	DVD Penetration%	PVR Penetration%
Atlantic							
2004	19.7	3.9	0.3	-	76.4	50.6	3.5
2009	14.2	3.0	5.3	1.2	45.1	69.2	10.4
Quebec							
2004	19.7	3.7	0.4	0.1	75.2	54.9	3.0
2009	16.1	3.0	6.3	1.6	44.6	66.6	13.9
Ontario							
2004	25.2	5.2	0.3	0.1	78.7	61.9	3.7
2009	18.2	4.1	9.7	3.1	47.7	17.6	18.3
Prairies							
2004	25.9	5.6	0.5	0.1	78.9	64.8	3.8
2009	19.9	4.7	13.5	4.6	46.1	72.0	22.9
B.C.							
2004	25.7	6.3	1.8	0.2	83.8	63.4	5.3
2009	18.5	3.5	15.2	4.9	51.1	76.4	22.2
Total Canada							
2004	23.7	4.9	0.6	0.1	78.4	60.1	3.7
2009	17.8	3.8	10.0	3.1	47.0	71.0	18.0

DVD and PVR penetration has increased significantly since 2004 in all regions.
VCR reach and penetration in all regions are declining as Canadians embrace new technology.

Source: BBM Fall 2004 & 2009



REGIONAL NETWORKS – ENGLISH

ACCESS provides educational television service to Alberta from off-air transmitters in Edmonton and Calgary and is carried on basic cable and satellite services for the rest of the province. It is also carried by Shaw Direct and Bell ExpressVu in their basic English packages to all of Canada. Preschool children's programs, shown in the mornings, are commercial free.

A Owned by CTVglobemedia, these channels cover the regions of Barrie/Toronto, Ottawa, Windsor and Vancouver Island.

CP24 CP24 is Toronto's 24-hour local news channel owned by CTVglobemedia.

CBC Regional Networks

- **CBC MARITIMES** covers New Brunswick, PEI and Nova Scotia.
- **CBC ONTARIO** covers Ontario.
- **CBC PACIFIC** covers British Columbia.
- **CBC WESTERN** covers Manitoba, Saskatchewan and Alberta.
- **CBC NORTH** covers the Northwest Territories.

CITYTV Owned by Rogers Communications, Citytv serves Toronto, Calgary, Edmonton, Vancouver and Winnipeg and surrounding areas with a mix of local, interactive formats.

CTV Regional Networks

- **CTV ATLANTIC** covers 98% of the Atlantic region, including Newfoundland/Labrador, PEI, New Brunswick and Nova Scotia.
- **CTV ONTARIO** covers 98% of the Ontario province.
- **CTV SASKATCHEWAN** covers 97% of the provincial population.

GLOBAL TELEVISION NETWORK
With stations in Halifax, Moncton/Saint John, Montreal, Ontario, Winnipeg, Regina, Saskatoon, Calgary, Edmonton and Vancouver, it covers 95% of total Canada and 98% of English Canada.

CTS An independent Ontario broadcaster covering 84% of the province with faith-based and family-friendly programming. CTS also has local stations in Calgary and Edmonton. The Ontario signal is available nationally on StarChoice and Bell ExpressVu.

OMNI OMNI Television is a free, over-the-air multilingual/multicultural broadcaster consisting of regional stations–OMNI in BC (CHNM); OMNI in Alberta (CJCO in Calgary; CJEO in Edmonton), and OMNI.1 (CFMT and OMNI.2) in Ontario. OMNI broadcasts an average of 20 languages per station.

SUN TV A conventional channel covering the Toronto/Hamilton market with re-broadcast transmitters in London and Ottawa. SUN TV station coverage now includes 90% of the population of Ontario.

SHOP TV CANADA A Direct Response (DR) channel broadcasting in the south-central Ontario and Nova Scotia regions, including Toronto and Halifax. It is available in 1.7 million household and airs both short and long form advertising.

REGIONAL NETWORKS – FRENCH

TÉLÉ-QUEBEC Supported by the Quebec government and covering the entire province, Télé-Quebec programming focuses on entertainment, culture and education.

V Covers approximately 94% of Quebec. Both network and selective bookings can be made.

SPECIALTY NETWORKS – ENGLISH

ABORIGINAL PEOPLES TELEVISION NETWORK (APTN) Offers a window into the lives of indigenous peoples in Canada and throughout the world.

BNN – BUSINESS NEWS NETWORK BNN is devoted exclusively to business and finance news with wall-to-wall coverage of the markets.

BRAVO! is devoted to the arts and culture.

CBC NEWS NETWORK A 24-hour, all-news and information English-language television service. Live news updates throughout the day and award winning documentaries.

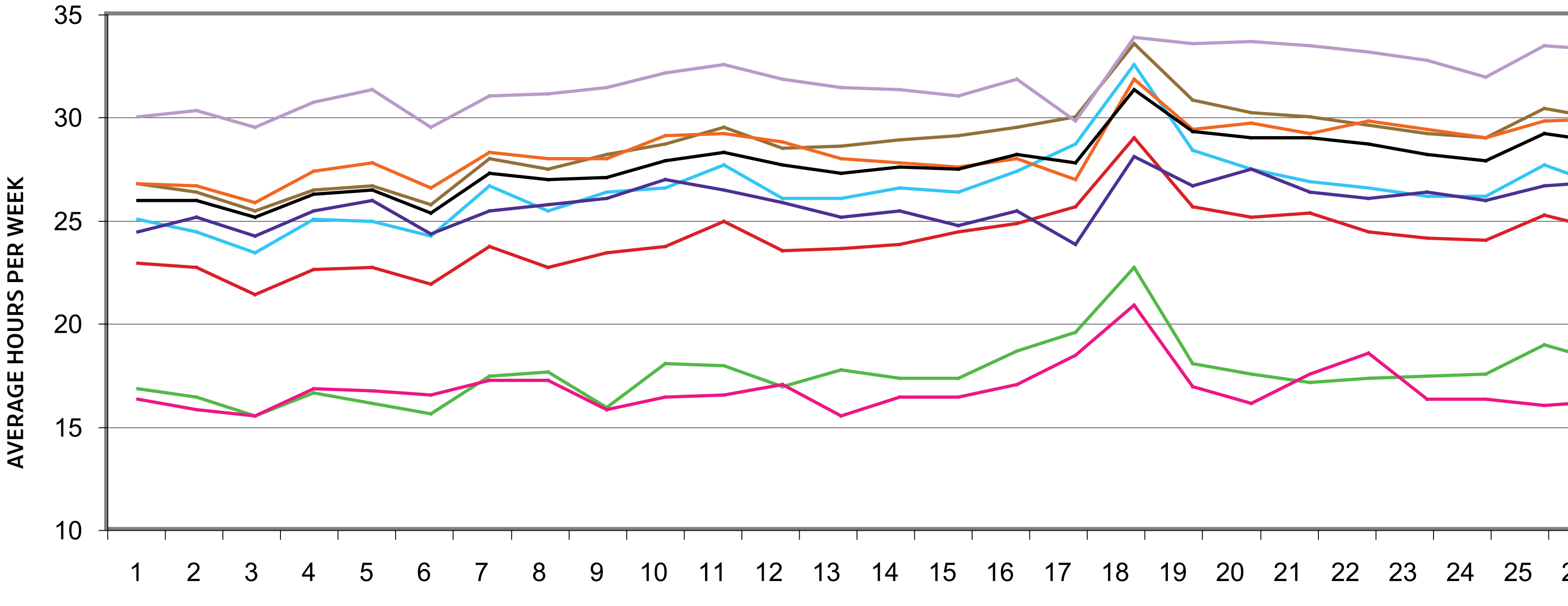
CMT Exploring themes relevant to country music, CMT offers a mix of comedy and dramatic series, movies and country music news, videos concerts and specials. CMT is available in over 9.5 million homes in Canada.

CTV NEWS CHANNEL is a 24-hour, all-news network.

DISCOVERY Discovery Channel is a source of factual programming exploring adventure, science and technology.

FAIRCHILD TELEVISION Fairchild Television is a national Chinese network in Canada. It offers over 21 hours of Cantonese programming daily and provides news, drama series and other programs to Chinese-speaking viewers of all ages. It is carried on cable services in Toronto, Vancouver, Calgary, Edmonton and Montreal, and on satellite by Bell TV and Star Choice.

AVERAGE VIEWING TREND - MONDAY TO SUNDAY 2AM-2AM



Source: Infosys National PPM, Fall 2009

FOOD NETWORK carries Canadian, U.S. and international culinary programs.

HGTV HGTV offers ideas on home renovation and landscaping.

HISTORY TELEVISION History Television offers audiences dramas, movies and documentaries about the people and events that have shaped the world.

MTV MTV offers a Canadian interpretation of the MTV brand across multiple platforms and across an MTV-branded analog specialty service that delivers lifestyle, talk and documentary programming.

MUCHMUSIC delivers a variety of youth and music-related programming to its audience of teens and adults.

MUCHMORE delivers music videos, concert specials, entertainment news, pop-culture programming, exclusive celeb-reality shows and classic cult movies.

OLN OLN offers action and adventure entertainment.

ROGERS SPORTSNET is comprised of four channels–Sportsnet East, Sportsnet Ontario, Sportsnet West and Sportsnet Pacific, all of which are available nationally. In addition, Sportsnet offers four high definition channels–Sportsnet East HD, Sportsnet Ontario HD, Sportsnet West HD and Sportsnet Pacific HD.

SLICE offers programming geared to women including family, fashion, relationships, diet, celebrity, finances and gossip.

SHOWCASE offers uncut series and movies.

THE SCORE is a national specialty television service delivering sports entertainment, highlights and live event programming in more than 6.7 million homes across Canada.

SPACE is Canada's national science fiction, speculation and fantasy channel.

STAR! is dedicated to the world of showbiz news and information.

TALENTVISION is a primarily Mandarin-language national television network that runs news, current affairs and informational programs. Popular drama series and variety shows from Mainland China and Taiwan are aired as well. Also offers Korean and Vietnamese programming.

TELETOON is available in both English and French, in 7.8 million Canadian homes, bringing animated entertainment to all ages.

THE COMEDY NETWORK airs comedy of all kinds, 24 hours a day, across multiple platforms, including a broadband service at thecomedynetwork.ca

THE WEATHER NETWORK is a provider of local, regional, national and international weather and weather-related information.

TREEHOUSE Seen in over eight million homes across Canada, Treehouse offers preschool programming from around the world that provides a co-viewing environment for children and their parents.

TLN (TELELATINO) TLN broadcasts a variety of domestic and international programming in Italian, Spanish and English, including news reports from Italy and Latin America, soccer, telenovelas, dramas, variety shows, feature films and specials. Telelatino is majority owned by Corus Entertainment.

TSN is a national network, covering a broad spectrum of sports.

TVTROPOLIS broadcasts recent iconic TV series.

VIVA A Canadian specialty network for boomers, VIVA targets women with a lineup of lifestyle programming, films and dramas.

VISIONTV Offers multi-faith and multicultural programming, along with comedy, drama and feature films for viewers aged 45-plus.

W NETWORK W Network's lineup of lifestyle shows, popular series and Hollywood hit movies is aimed directly at women.

YTV Aimed at kids aged 6-11 and their families, YTV is available in over 10.5 million homes across the country.

SPECIALTY NETWORKS – FRENCH

ARTV A blend of arts and culture, showcasing the film, theatre, music, dance and visual arts.

CANAL VIE Programming dedicated to women's interests, including health and well-being, family, food and design.

CANAL D Canal D is a documentary channel.

CANAL EVASION A tourism, travel and adventure channel.

HISTORIA A specialty television service dedicated to history in Quebec, as well as the rest of the world.

LA CANAL NOUVELLES (LCN) Continuous news format offering regional, national and international news updates.

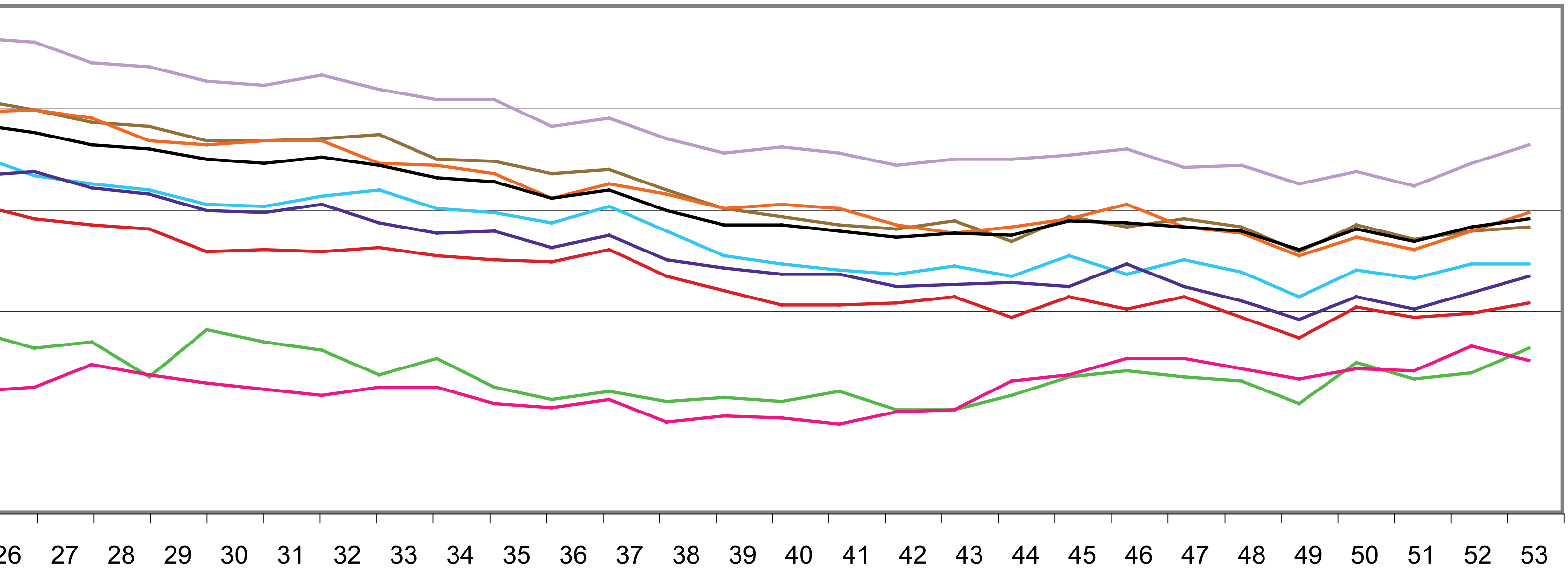
MÉTÉOMÉDIA Sister station to The Weather Network and a provider of weather and weather-related information.

MUSIMAX MusiMax is about Hollywood and the musical star system.

MUSIQUEPLUS MusiquePlus is a multi-platform, interactive brand devoted to music and entertainment.

RÉSEAU DE L'INFORMATION DE RADIO CANADA (RDI) A French-language, 24-hour news and information network, RDI links Francophones across the country with reporting and current affairs programming, including documentaries and interviews.

RDS (LE RÉSEAU DES SPORTS) is Canada's



French-language sports network.

SÉRIES+ offers new shows and the latest successful foreign productions, which are broadcast in French.

TELETOON (FRENCH) Available in both English and French in over 7.8 million Canadian homes, Teletoon offers animated entertainment for all ages.

TV5 Delivers a range of news, entertainment, documentary and sports from French-language sources in Canada and around the world.

VRAK TV Youth channel featuring sitcoms, dramas and cartoons.

ZTÉLÉ presents techno newsmagazines, science, extreme jobs and paranormal-oriented documentaries, as well as supernatural and mystery fiction TV series.

DIGITAL NETWORKS – ENGLISH

THE ACCESSIBLE CHANNEL Also known as TACtv, The Accessible Channel is a national, English-language, described-video, closed-captioned, basic HD digital-TV specialty service. TACtv broadcasts popular TV programs from conventional and specialty TV services and foreign-rights holders in open format for people who are blind, have low vision, are deaf or hard of hearing.

ACTION provides action-based movies and series.

ANIMAL PLANET offers a journey into the animal world at home and around the globe.

AUX TV offers music programming, including live performances, in-depth interviews and music videos.

BBC CANADA Home of the best British television from the BBC.

BBC KIDS Offers a lineup of children's programming from across the U.K. and around the world.

BIO, THE BIOGRAPHY CHANNEL showcases real people and real drama. Programming blocks offer a mix of biographies, reality series, documentaries and films.

BITE TV is an alternative comedy channel offering stand up, sketch and comedy programming and featuring the brightest comedy stars before they hit it big, and emerging and established comedy talents from across Canada and the globe.

BPM:TV is a dance channel featuring music videos, club openings, interviews and fashion.

BOLD is a 24-hour English-language digital television service with drama, comedy, performing arts and some sports.

BOOK TELEVISION is Canada's only television channel devoted to words, spoken, written, or wired.

COSMOPOLITAN TV targets women with a lineup of reality shows, dramas and movies.

COURT TV CANADA is a nationally distributed specialty service featuring programs about police, forensic science, the law, the courts, rescue and emergency medicine.

DEJA VIEW features classics from the 70s and 80s.

DISCOVERY CIVILIZATION CHANNEL explores the people, cultures and ideas that have shaped our common past, and those that will dictate our future.

DISCOVERY HD offers factual storytelling from Canada and around the world in HD.

DISCOVERY HEALTH CHANNEL features stories about human health.

DIY NETWORK CANADA offers home improvement programming.

DOCUMENTARY is an English-language digital television service delivering Canadian and international documentaries, films and series.

DUSK features supernatural, thriller and suspense-based Hollywood feature films and television.

EQUATOR HD features stories of remote cultures, rare geography and unique rituals.

ESPN CLASSIC has encore broadcasts of classic games and moments from the world of sports.

FASHIONTELEVISIONCHANNEL is an English-language fashion channel dedicated to the world of art, architecture, photography and design.

FOX SPORTS WORLD provides sports news, information and coverage of sporting events from around the world.

G4 G4 (formerly G4TechTV) is a digital television station that connects young adults to the latest in entertainment, gaming, pop culture and technology.

GAMETV provides a range of programming and online options, including classic game shows, reality programming, non-sports programming and game-related movies and documentaries.

GOLTV covers national and international soccer content, with an emphasis on Toronto FC, including profiles, live matches, analysis and programming on soccer.

GLOBAL REALITY CHANNEL Canada's channel dedicated to reality programming 24/7 features the most popular reality shows on TV.

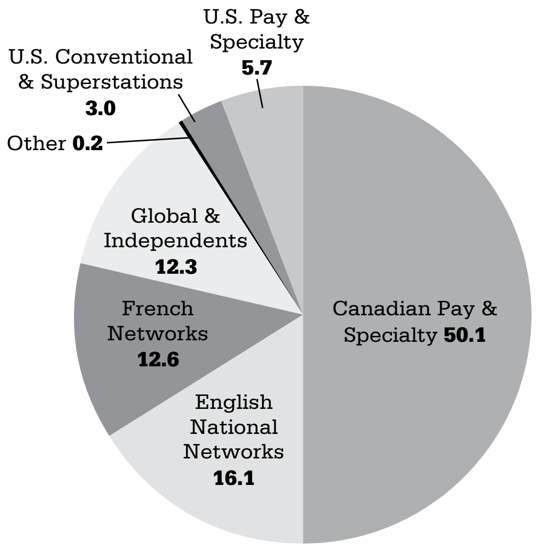
HPITV is a sports channel dedicated to horseracing from across North America and around the world, displaying post parades, handicapping commentary and races.

ICHANNEL is a public and social affairs issues channel. It broadcasts documentaries, discussion sessions and feature films.

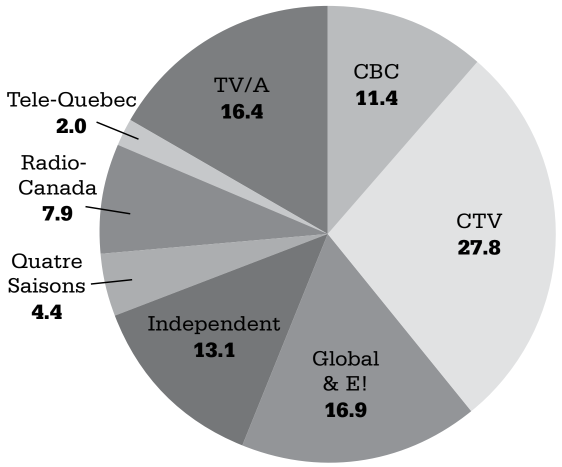
IFC The TV channel devoted to uncut movies.

IDNR – TV NATURAL RESOURCES TELEVISION offers programming about the natural resources sector in Canada and the people whose lives and businesses operate in this segment.

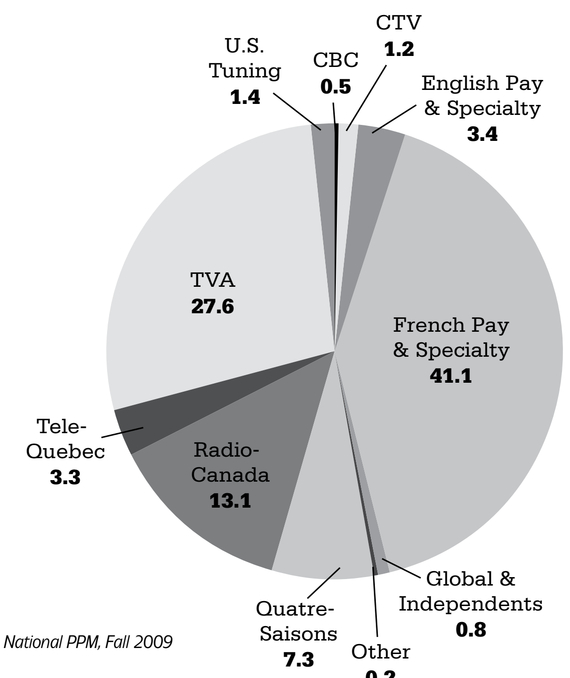
Viewing habits of Canadians 2+ by Station Groups, Share of Hours Tuned
TOTAL CANADA MON - SUN 6A-6A



National Television Audience Share across available Canadian Conventional channels - all persons 2+
TOTAL CANADA MON - SUN 6A-6A



Viewing Habits of Canadians 2+ Across Available Channels, Share of Hours Tuned
QUEBEC PROVINCE MON - SUN 2A-2A



Source: Infosys National PPM, Fall 2009

JOYTV offers multi-faith programming with family-friendly entertainment.

LEAFS TV focuses on the Toronto Maple Leafs and covers all game aspects including pre- and regular-season action, pre/post coverage and other Leafs-related content.

MEN TV Geared to men, with programming covering health, sports, lifestyle, cars, fashion and sex. Airs comedy, crime and outdoor programming.

MOVIEOLA features action, drama and comedy short films.

MOVIE TIME features big-ticket movies with over 250 movie titles each month and back-to-back movies on the weekend.

MTV2 airs and covers hit movies, comedy, extreme sports, live music and videos, animation and gaming.

MUCH LOUD delivers hard music–alternative, metal and punk music videos–featured along-side artist interviews, specials, classic archival material and concert info.

MUCHMORERETRO is the source of 24/7 classic retro music videoflow.

MUCHVIBE features contemporary urban music programming.

MYSTERY features a mix of television suspense and crime dramas .

NATIONAL GEOGRAPHIC CHANNEL offers programming about the exotic, natural world we live in.

NHL NETWORK offers complete hockey coverage, both on and off the ice.

NICKELODEON (CANADA) features a line-up of Nick's award-winning properties, from current live-action comedies and animated favorites to classic hits.

OASIS HD is a nature channel committed to family friendly shows, award winning documentaries and IMAX original films.

ONE: THE BODY MIND & SPIRIT CHANNEL Focuses on natural health and personal growth.

OUT TV Canada's media outlet dedicated to the LGBT community features Hollywood movies, indie favourites, documentaries, drama and real life programming.

THE PET NETWORK is focused on the world of pets and their relationship with humans.

PUNCHMUCH is Canada's fully automated, all-request music video service, allowing music fans to request videos, participate in polling and on-screen SMS chat, all via wireless phones.

RAPTORS NBA TV offers pre- and regular-season games and per/post shows on the Toronto Raptors and features about 140 NBA games from around the league.

ROGERS SPORTNET ONE has launched in August 2010. It offers a miscellany of sporting events.

RUSH HD is Canada's extreme sports HD channel.

SETANTA SPORTS (CANADA) An international pay TV sports network offering live and delayed European soccer, international rugby and other global sports.

SHOWCASE DIVA features hit movies and series for women.

SILVER SCREEN CLASSICS specializes in classic movies from the 1930s to the 1960s.

SUNDANCE CHANNEL offers feature films, festival-selected shorts, documentaries and original series.

TELETOON RETRO Available in English and French, Teletoon Retro presents classic cartoons.

THE FIGHT NETWORK offers combat sports, including mixed martial arts, boxing, wrestling, kickboxing and other sports.

TRAVEL + ESCAPE features programs that highlight glamorous and daring travel destinations.

TREASURE HD features cultural treasures such as quirky pieces of pop culture, the world's finest museums, films and classic concerts.

TSN2 brings a lineup of major league sports action.

PER CAPITA HOURS

Stations	Percent Distribution of Weekly Per Capita Hours by Daypart: Total Canada					
Audiences	Ind. 2+	A18+	F18+	M18+	T12-17	C2-11
Dayparts	% T min	% T min	% T min	% T min	% T min	% T min
M-F 2a-4:30p	23.4	23.1	24.3	21.8	20.7	27.5
M-F 4:30p-7p	12.5	12.1	12.2	12.1	14.3	14.7
M-Su 7p-11p	37.5	38.0	37.8	38.2	38.7	31.7
M-Su 11p-2a	9.6	10.2	9.6	10.9	7.2	4.7
Sa 2a-7p	8.0	7.7	7.5	8.0	9.3	10.4
Su 2a-7p	9.1	8.8	8.5	9.1	9.9	11.0

Source: Infosys National PPM, Fall 2009
Note: Infosys now tracks 2a–2a, the numbers have been changed to reflect this and capture total TV viewing.

TV LAND CANADA provides a range of familiar TV favorites.
W MOVIES Offering movies from romance to comedy, and thrillers to mysteries, W Movies targets women.
WILD TV HUNTING AND FISHING NETWORK offers a line-up of hunting and fishing shows with complementary programming.
WFN: WORLD FISHING NETWORK is dedicated to all segments of fishing with programming that covers instruction, tips, tournaments, travel, food, boating, outdoor lifestyle and more.

DIGITAL NETWORKS – FRENCH

ARGENT is a channel that focuses on economic and business news, as well as on personal finance. It also broadcasts entertainment shows related to money.
AVIS DE RECHERCHE is a public interest television network whose programming is entirely devoted to public safety, broadcasting images of missing persons and of suspects wanted by the police, as well as a variety of safety and prevention messages.
LES IDEES DE MA MAISON is a channel that focuses on renovations, decoration, cooking, gardening, D.I.Y. and the art of living.
MYSTÉRE offers a range of Canadian and foreign crime, action and suspense series.
PRISE 2 is a channel that includes television and cinema classics from Quebec and America, TV series that have aired at least 10 years ago and films that have aired 15 years ago.
RIS INFO SPORTS broadcasts sports news and scores updated all day long.
TÉLÉTOON RETRO (FRENCH) Available in both English and French, Teletoon Retro presents classic cartoons.
YOOPA offers programming dedicated to preschool-aged children.

PAY AND SPECIALTY SERVICES

ENGLISH LANGUAGE

HBO Canada
Encore Avenue
Movie Central
The Movie Network
Mpix
Family
Disney Playhouse
Viewers Choice

FRENCH LANGUAGE

Super Écran
Cinépop

PAY PER VIEW/ ON DEMAND

Viewers Choice
Shaw Pay-Per-View
Vu!-National (Bell ExpressVu)
Canal Indigo
Rogers

DIGITAL NETWORKS - OTHER LANGUAGES

ALL TV All TV is Canada's national Korean-language television broadcaster operating two linear channels and a digital signage channel.
ATN ATN provides TV programming in several South Asian languages. ATN operates 23 specialty TV channels.
CHANNEL PUNJABI TELEVISION has programming that includes daily broadcast of Gurbani from Sri Harmandir Sahib (Golden Temple), religioun, news about Punjab and the Punjabi community in Canada, current affairs and culture based shows from India and Canada.
ETHNIC CHANNELS GROUP is a distributor of international TV channels in Canada. It currently provides 15 services/channels 24/7. Languages offered include Russian, Arabic, Greek, Vietnamese, Tagalog, German, Hebrew, Iranian, Pakistani, Hindi and Urdu.
HTB Canada offers programming in Russian from Russia's national broadcaster.
LS TIMES Programming focuses primarily on current feature films from Hong Kong, with a mix of popular movies from China, Taiwan, Japan, South Korea and other Asian countries. All films are aired in original language with Chinese subtitles.
NTV Canada is a Russian-language channel broadcasting original NTV programming from Moscow and Canada. NTV Canada offers seven daily live news-broadcasts from Russia, a variety of feature films, TV serials, popular game shows and analyses of Russian/European soccer.
NUEVO MUNDO TELEVISION is Canada's first 100% Spanish language TV channel. Airs news and stories on the life of Spanish-speaking immigrants in Canada.
ODYSSEY is Greek television offering news, entertainment, sports and informative local programming directly from Greece.
ERT-SAT ERT sat (formerly Odyssey II) provides family oriented entertainment. The programming includes educational programs for children, soaps and novellas, Greek soccer, international news broadcasts, talk shows and documentaries.
PERSIAN VISION presents local Canadian content and programs from around the world, including news, sports and entertainment.
SAHARA ONE is a Hindi general entertainment channel. Programming includes daily soaps, movies from Bollywood, children's shows, game shows, talk shows, style and fashion, special events and live call-in shows.
SKY TG 24 CANADA offers 100% Italian language programming delivering headlines, breaking news, studio discussions and European soccer.
SSTV presents a variety of programming from movies to concerts, to reality T.V., as well as news information in Punjabi, Hindi and English.
TAMIL ONE provides entertainment, news and Canadian Tamil culture programs.
TAMIL VISION offers a variety of programs ranging from world news in Tamil, movies and tele-series and daily, locally produced news, live shows and localized programs.
TLN EN ESPANOL is an all-Spanish television channel offering programming from the Latin world. Programming highlights feature daily news, movies, Europa League soccer, soap operas, talk shows and live music.
FESTIVAL PORTUGUESE TELEVISION serves the Portuguese speaking communities in Ontario and Quebec. Programming includes news services from Portugal, Canada and around the world, sports programs and Portuguese and Brazilian telenovelas.

SPECIALTY STATION REACH, VCR, CABLE, 2+ TV SETS EXPRESSED BY % OF POPULATION 2+

Market	2+ Population (000)	Specialty/Pay TV Canada + US Reach (%)	Specialty/Pay TV Canada + US Share (%)	Digital Specialty Canada Reach (%)	Digital Specialty Canada Share (%)	VCR/DVD Reach (%)	2+ TVs (%)	Penetration (%) Cable	Penetration (%) Satellite	Penetration (%) PVR	Penetration (%) VCR	Penetration (%) DVD
Atlantic												
St. John's-Corner Brook	446	82	37	22	4	14	79	69	27	7	41	65
Charlottetown	135	78	36	21	4	16	67	46	47	10	45	69
Sydney-Glace Bay	139	74	30	21	4	11	74	54	39	7	49	69
Halifax	654	77	33	24	5	21	69	65	30	16	48	73
Saint-John-Moncton	609	78	36	24	4	21	68	51	41	11	45	68
Carleton	146	77	28	14	2	14	67	49	47	5	40	60
Québec												
Rim.-Mat.-Sept-Iles	220	83	28	19	2	15	70	66	31	9	47	63
Rivière-du-Loup	135	78	27	19	2	17	68	55	39	9	47	60
Saguenay	268	84	30	16	2	20	75	70	28	15	42	65
Québec	1,057	77	27	17	2	22	66	66	26	15	48	67
Sherbrooke	565	78	26	14	2	21	60	60	33	12	47	70
Montréal-English	4,666	73	32	26	4	22	67	57	35	17	48	70
Montréal-French		77	40	14	2	17	72	27	8	22	58	72
Trois-Rivières	303	78	26	15	2	18	67	66	28	11	47	67
Rouyn-Noranda	142	76	30	15	3	13	65	58	37	7	51	68
Ontario												
Toronto-Hamilton	7,350	81	38	23	4	26	66	75	20	20	46	72
Ottawa-Gatineau	1,422	75	32	20	3	27	68	60	33	21	45	71
Ottawa-Gatineau Anglo		74	33	22	4	29	69	57	35	25	46	72
Ottawa-Gatineau Franco		75	30	14	2	22	65	66	28	14	44	71
Pembroke (CM)	101	79	34	30	6	17	66	14	80	9	48	70
Kingston		79	36	30	5	24	69	36	58	15	49	73
East Central Ont.	734	81	36	29	5	23	68	33	62	14	48	71
Peterborough		81	36	27	4	19	68	33	63	11	48	69
Barrie	510	78	36	28	5	25	77	51	44	19	47	71
Kitchener-London	1,960	74	36	23	4	24	64	57	32	16	54	73
Kitchener		73	37	23	4	24	64	58	30	14	54	73
London		78	35	23	4	23	67	60	32	18	52	74
Windsor	416	64	27	15	2	19	77	52	24	10	51	74
Sudbury-Timm.-N. Bay / S.S. Marie	521	80	35	27	4	20	69	45	50	13	52	68
Thunder Bay	152	80	43	22	3	22	70	56	38	13	51	75
Kenora	36	80	42	24	5	18	63	43	51	7	47	71
Manitoba												
Brandon	127	73	34	25	4	16	56	35	52	9	55	68
Winnipeg	941	79	38	24	4	25	68	70	23	17	54	74
Saskatchewan												
Yorkton	81	82	39	34	4	16	57	26	66	11	51	64
Regina-Moose Jaw	299	85	42	28	4	30	72	66	30	28	47	68
Saskatoon	315	81	42	35	5	20	65	56	38	18	49	72
Prince Albert	106	75	38	34	6	21	56	26	64	8	55	71
Alberta												
Medicine Hat	81	79	41	24	4	24	62	54	41	20	49	71
Calgary	1,584	77	35	18	3	34	68	73.7	24.5	32	40.7	68.4
Red Deer	245	74	31	24	4	25	66	43.5	45.5	14	49.8	79.5
Lloydminster	89	84	39	34	6	22	57	27	72	13	47	73
Edmonton	1,640	79	37	24	4	29	68	60	34	24	45	74
British Columbia												
Okanagan-Kamloops	577	80	37	20	3	23	66	61	34	18	56	77
Terrace-Kitimat	70	69	34	23	4	19	50	43	42	8	53	73
Pr. George-Terrace-Kitimat		72	35	20	3	27	54	56	32	13	50	74
Prince George	107	75	35	17	3	33	58	68	23	18	47	76
Vancouver-Victoria	3,404	77	29	15	2	29	60	88	9	24	51	77
Dawson Creek	63	72	37	27	5	27	42	36	52	16	52	74
Total Canada	**33,503**	**78**	**34**	**21**	**3**	**25**	**66**	**66**	**28**	**18**	**47**	**71**

Source: BBM

Television Data Sources

BBM CANADA/ SONDAGES BBM

1500 Don Mills Road – 3rd floor
Toronto, Ontario M3B 3L7
T: 416.445.9800
www.bbm.ca

BBM is the member-owned tripartite industry organization that has measured TV audiences across Canada since 1952. BBM provides broadcast measurement and consumer behaviour data to broadcasters, agencies and advertisers. These data are the currency on which TV airtime is bought and sold in Canada. BBM also has offices in Montreal, Richmond and Moncton.

TV AUDIENCE MEASUREMENT

BBM measures TV audiences using two different methodologies–paper diaries and portable people meters (PPMs). Diaries are used to collect data on single weeks of viewing by persons age 2+, for selected weeks of the year–four weeks in the fall and three weeks in early spring. Viewing is recorded in the diary in 15-minute increments from 6 a.m. to 2 a.m.

PPMs are used to measure TV audiences in Toronto, Vancouver, French Montréal and Calgary and for regional and national networks. PPMs are small, pager-like devices carried by a representative panel of persons age 2+. They passively record exposure to TV programmes and advertisements by picking up inaudible codes embedded in the broadcasts. Data are captured every hour of every day and can be reported in increments as small as a single minute.

TV REPORTS

BBM produces a variety of reports analyzing various aspects of TV viewing.

THE REACH REPORT, issued with every survey, provides TV station reach and share information for six broad demographic groups in all BBM measured areas, organized by area and member station.

THE TV TECHNICAL GUIDE, issued with every survey, provides overall statistics and sampling data validating the survey, such as overall tuning levels, response rates, trends etc.

THE EM MARKET STATS CARD provides relevant information about every extended market measured, including a trend of VCR, Cable, DVD, PVR and satellite penetration, as well as average hours per capita and audience shares by station group.

THE TV GEOGRAPHICAL REFERENCE GUIDE contains detailed provincial and market maps, plus Statistics Canada population estimates for each reported age/gender subgroup in every BBM defined area and market.

THE TV DATA BOOK provides an overview of national and regional TV viewing habits in Canada in graphic form and detailed national TV viewing information in table form.

THE TV STATION GUIDE contains information such as station location, station groups, total tuning groups, TV area list, call letter changes and more.

Further TV reports are available from BBM on a custom basis.

NIELSEN MEDIA RESEARCH

160 McNabb Street
Markham, Ontario L3R 4B8
Phone: 905.475.9595
http://ca.nielsen.com

The Nielsen Company is a global information and media company providing marketing and consumer information, TV and other media measurement, online intelligence and more. In addition to the Canadian head office in Markham, Nielsen has an office in Montreal.

COMPETITIVE INTELLIGENCE SERVICES

Nielsen provides data on advertising expenditure, TV GRP data and creative tracking. Its advertising expenditure estimates cover TV (network and spot), radio, magazines, daily newspapers and out-of-home, with detail available down to the city level.

CREATIVE TRACKING SERVICES Nielsen provides copies of advertising executions from TV, radio and selected magazines and newspapers. For TV specifically, Nielsen monitors all major TV stations and specialty networks across the country. Nielsen's library of approximately half a million TV commercials dates back to the 1970s.

AUDIENCE ANALYSIS Nielsen offers a suite of software tools for analysis of TV audiences. Agencies use these tools in the planning, execution and reporting of TV campaigns, as well as in the analysis of competitive TV activity.

BBM ANALYTICS

1500 Don Mills Road – 3rd floor
Toronto, Ontario M3B 3L7
T: 416.445.8881
www.bbmanalytics.ca

BBM Analytics is a subsidiary of BBM Canada offering a portfolio of software solutions that provide insights into the impact of broadcast content and consumer behaviour. In addition to the Toronto head office, BBM Analytics has offices in Montreal and Vancouver.

AUDIENCE ANALYSIS BBM Analytics provides a variety of software applications for analyzing meter and diary TV audience data at the respondent and summarized level. Agencies use these tools in the planning, execution and reporting of TV campaigns, as well as in the analysis of competitive TV activity.

COMPETITIVE INTELLIGENCE BBM Analytics offers a database of TV GRP activity that allows clients to analyze competitive campaigns. The database covers the activity of almost one million brands and is available in Toronto, Vancouver, Calgary and French Montreal.

TV BUREAU OF CANADA (TVB)

160 Bloor Street East, Suite 1005
Toronto, Ontario M4W 1B9
Phone: 416.923.8813
www.tvb.ca

The TVB is a resource for its 150+ membership, comprised of Canadian TV stations, networks, specialty services and their sales representatives. It also acts as a marketing organization promoting the benefits of TV advertising to the industry. TVB resources include media research, business category information and publications such as TVBasics. TVB's Telecaster service issues clearance numbers for all advertising on member stations. TVB has an office in Montreal in addition to the Toronto head office.

Radio

Radio

Distribution

Commercial radio stations	**681**
HHs with radio	**99%**

Consumption

1-week reach A 18+	**92%**
Avg 18+ hrs weekly	**19**

GENERAL INFORMATION

There are 1213 over-the-air Canadian radio services in Canada: 897 English-language, 270 French-language and 46 other languages. Of the private commercial stations, 158 are AM and 523 are FM. (Source: CRTC Communications Monitoring Report 2009)

Radio reaches 91% of Canadians 12 and older in an average week and that figure has remained constant for most demographic groups, with slight declines amongst teens and young adults. Weekly reach is very consistent across all regions of the country.

FM Radio stations reach 81% of persons 12+ while AM reaches 31%. AM radio has a slightly higher reach against men than against other groups, likely because many AM stations target male listeners with "all sports" or "all news" formats. FM dominance decreases with age as older listeners are more likely to tune to news/talk formats on AM radio.

Unlike television, which is generally bought on a program-by-program basis, radio is purchased by time blocks or dayparts. Understanding the performance of various dayparts against different demo-

WEEKLY REACH AND SHARE OF HOURS TUNED BY DEMO

	REACH			SHARE		
Canada	All (%)	AM (%)	FM (%)	AM (%)	FM (%)	Misc. (%)
12+	91	31	81	20	78	2
Women 18+	93	29	82	19	79	2
Men 18+	91	37	80	22	75	3
Teens 12-17	79	10	76	4	94	2

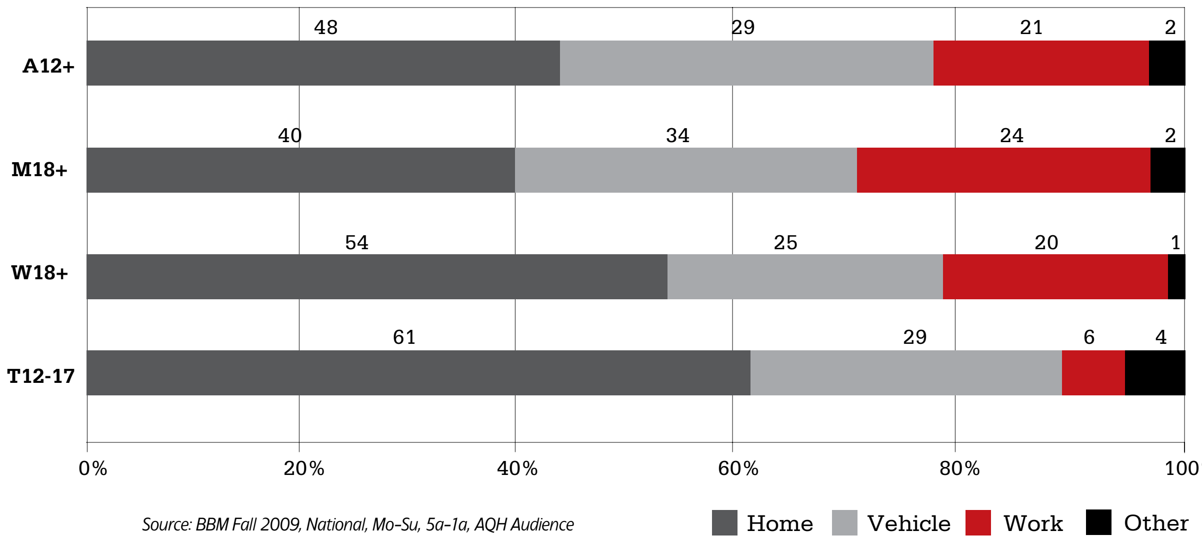
Source: BBM Fall 2009, Mo-Su, 5a-1a

AUDIENCE COMPOSITION BY DAYPART (%)

Time Block		Women 18+	Men 18+	Teens	Total
Breakfast	Mo-Fr 6-10a	49	48	3	100
Midday	Mo-Fr 10a-4p	51	48	1	100
Drive	Mo-Fr 4-7p	47	49	4	100
Evening	Mo-Fr 7p-12a	45	48	7	100

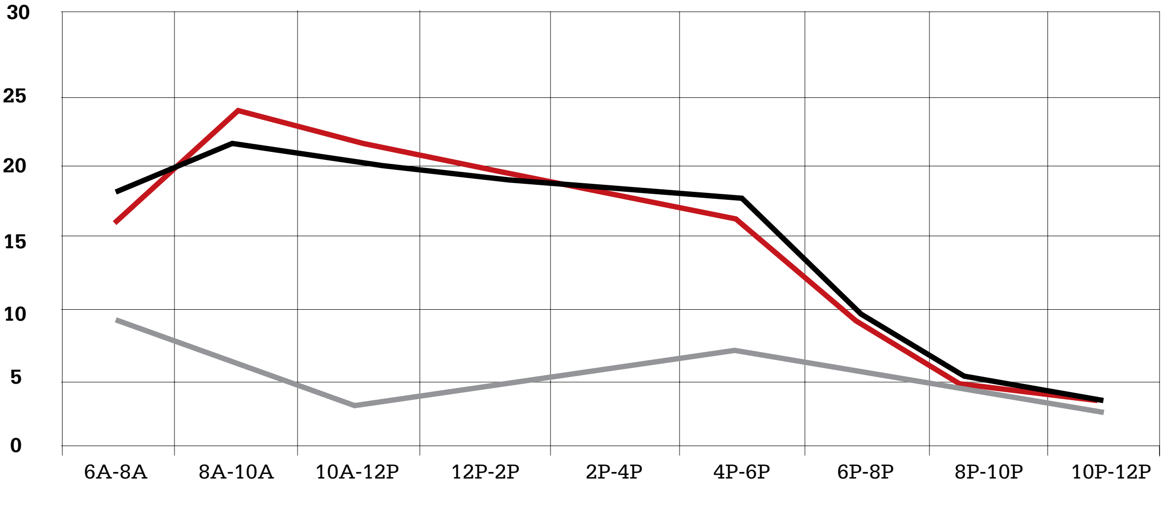
Source: BBM Fall 2009, National, AQH Audience

PERCENTAGE OF LISTENING BY LOCATION



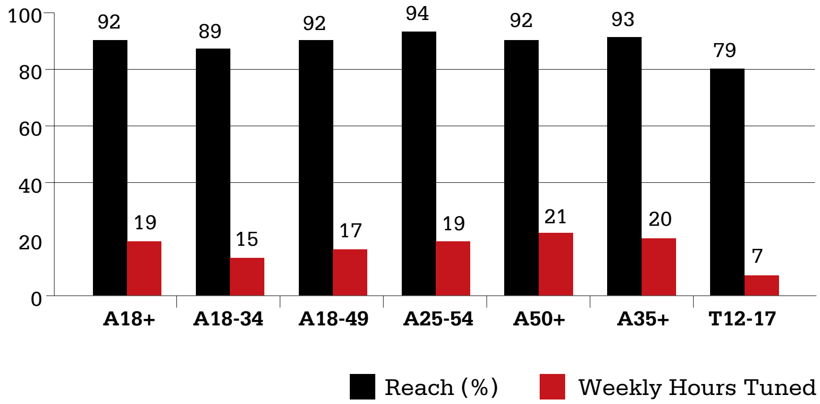
Source: BBM Fall 2009, National, Mo-Su, 5a-1a, AQH Audience

AVERAGE QUARTER-HOUR RATINGS BY DAYPART



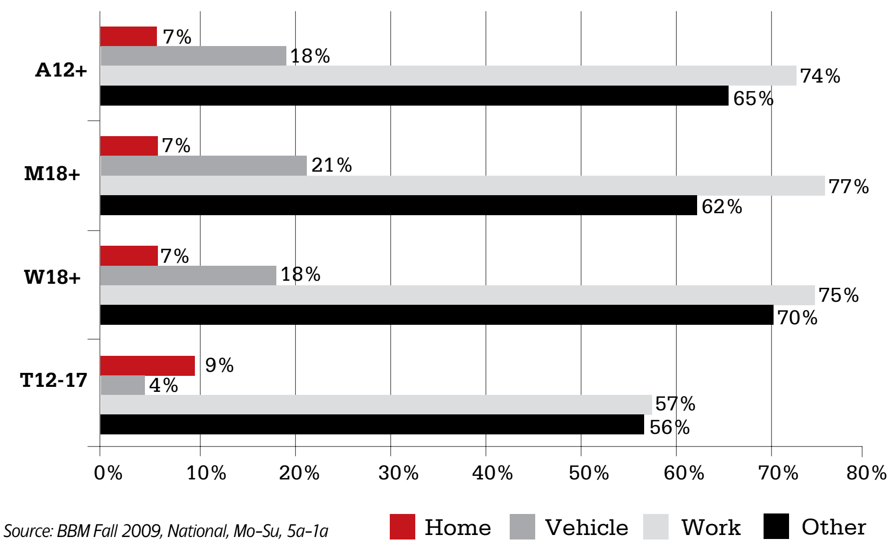
Source: BBM Fall 2009, National, Mo-Su

WEEKLY REACH & HOURS TUNED BY MAJOR DEMO



Source: BBM Fall 2009, National, Mo-Su, 5a-1a

PERCENT WEEKLY REACH BY DEMO AND LOCATION



Source: BBM Fall 2009, National, Mo-Su, 5a-1a

graphic groups is key to the effective use of radio. For example, more women are reached by the midday time block than by the evening time block. But for a teen target group, the evening time block is a better choice than midday. Radio can be bought on a ROS (run of schedule) basis or as targeted as midday only.

Radio reaches a large percentage of the population, however the reach against younger groups, particularly teens, continues to decline. This may be owing in part to teens having more entertainment options available to them than before and more places to get music, but also speaks to the fact that there are few radio stations that program specifically to reach this target group.

About half of all radio listening done by Canadians occurs in the home. The figure is significantly higher for teens (61%) and lower for men (40%).
Although about half of all hours tuned occur in the home, radio's actual weekly reach for many demos is higher in the vehicle than at home. Reaching consumers in their vehicles is key for retailers, as the radio message could be the last one to which a consumer is exposed before entering a store to make a purchase.

For adults, radio listening usually peaks mid-morning, with a secondary peak around the dinner hour. For teens, the highest peak is early morning before school, with a secondary peak in late afternoon. Teen tuning drops off much less

Bookings/Cancellations

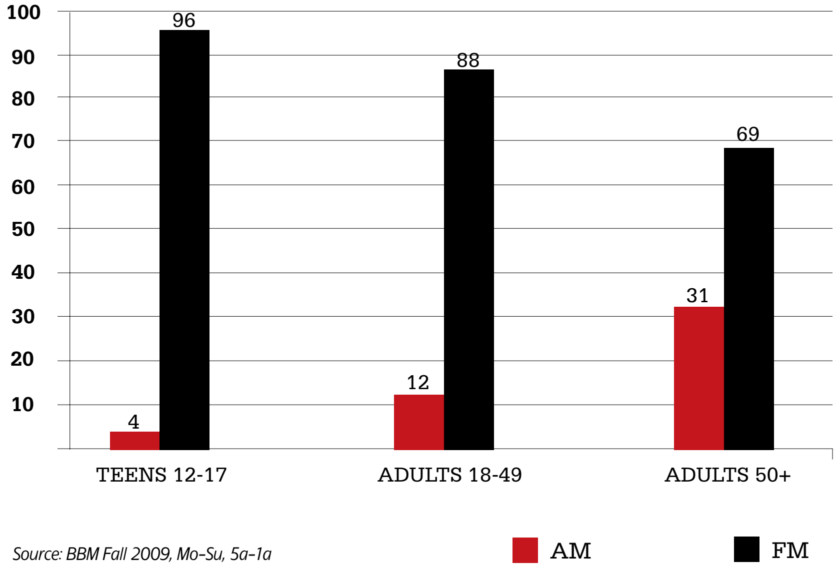
Most radio stations provide the opportunity to sponsor specific programming features (e.g. news, sports, traffic). Additionally, discounts for long-term bookings or volume are generally offered. Demand for radio airtime has increased dramatically over the past few years and this has precipitated a demand-driven rate card in major markets. Lead time has become crucial in maintaining market costs and access to preferred inventory.

In most cases, campaigns with creative executions of 60 seconds or shorter can be terminated by either the station or the agency with 14 days' notice. A flighted contract cancelled during the hiatus period may be subject to the same condition. The standard contract form should be consulted for detailed terms and conditions.

Promotions

Radio stations will also create promotions for advertisers. These promotions can be as simple as product giveaways during station-owned features or as major as an advertiser-specific promotion. Promotions generally have some type of cost associated with them and the advertiser will need to provide prizes for the listeners. Promotions can air as part of a brand sell campaign (e.g. 30-second spots) or can air by themselves.

AM/FM SHARE OF TUNING BY AGE GROUP



Source: BBM Fall 2009, Mo-Su, 5a-1a

than adult tuning after the late afternoon peak, holding fairly steady through most of the evening.

This consumption pattern is markedly different from that of television, where peak viewing for most demos occurs in the middle of the evening, around 9 p.m.

The last five years have not seen a significant shift in share of hours tuned by ownership group in English Canada. Share of tuning for Corus, Standard and CHUM has shown a minor decrease. while CBC's share has shown a slight increase. Rogers' share has remained the same.

French Canada has seen some activity in share of tuning by ownership group. All major station groups have shown an increase in share of tuning since Fall 2003, with the exception of Astral/Standard. Corus showed the largest increase, picking up eight share points.

COMMERCIAL REGULATIONS

Both AM and FM stations are self-regulating in terms of number of commercial minutes and placement of those minutes. CBC radio stations are non-commercial and airtime cannot be purchased by advertisers.
The 30-second spot is the most commonly aired spot length. However, stations will accept 60-second bookings at an 85-100% cost premium. Ten-second spots are becoming more popular among some advertisers and can be a more cost-effective way to use radio. Fifteen-second spots are accepted by a few radio stations but the majority of stations do not sell 15-second spots.

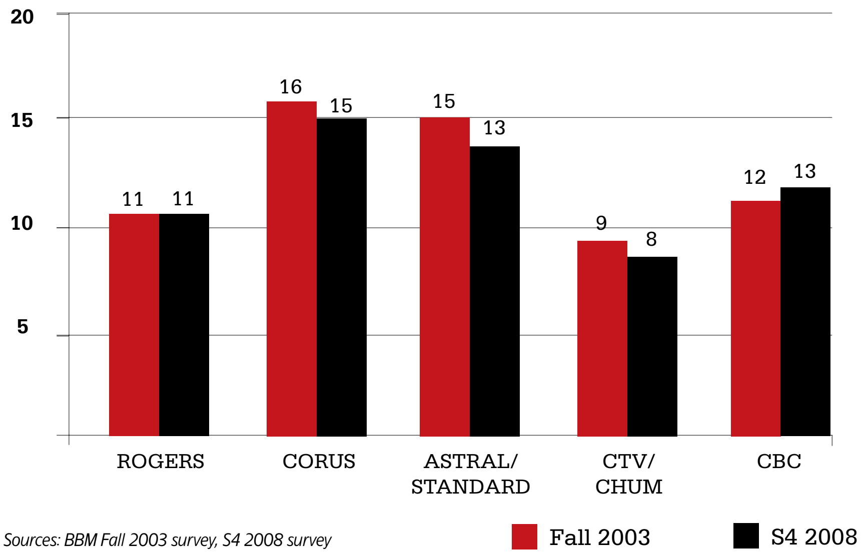
SYNDICATED RADIO

Syndicated radio can be an alternative way to plan or purchase a national campaign. Many syndicated radio owners offer a variety of programming that caters to different audiences. They can also create programs or features that are advertiser-specific, to air across their station roster. Some broadcasters will offer traffic tags and targeted sponsorships on a national or provincial basis. Key syndicators include Orbyt, Skywards Traffic Network, Canadian Traffic Network and Deep Sky.

SATELLITE RADIO

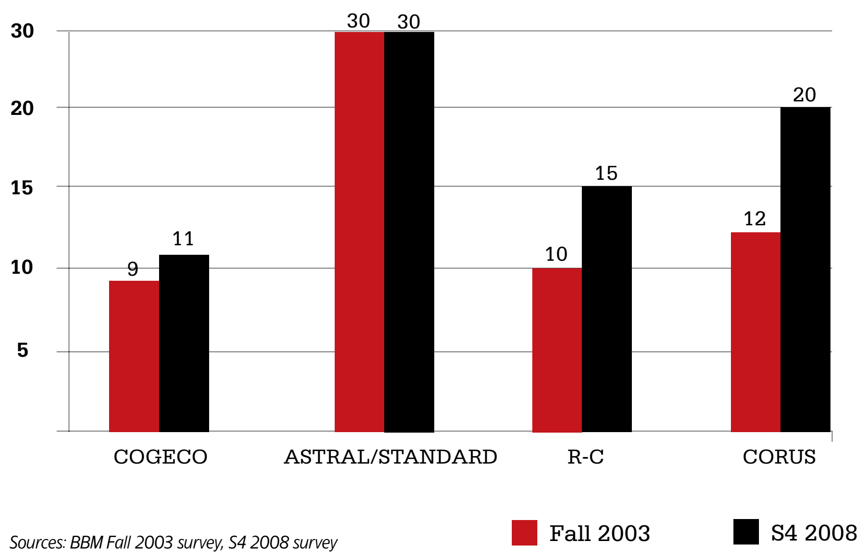
In Canada there are two companies offering subscription-based satellite radio service: privately owned Sirius Canada and publicly owned XM Canada. Although Sirius and XM merged in 2008 in the U.S., they continue to operate separately and compete against each other in Canada.
Subscribers can access Sirius or XM programming through integrated satellite radios

SHARE OF RADIO HOURS TUNED BY MAJOR STATION – ENGLISH 18+



Sources: BBM Fall 2003 survey, S4 2008 survey

SHARE OF RADIO HOURS TUNED BY MAJOR STATION – FRENCH 18+



Sources: BBM Fall 2003 survey, S4 2008 survey

installed in vehicles or with a variety of aftermarket radios available from consumer electronics stores. For subscribers, satellite radio offers coast-to-coast signal coverage, digital quality sound and content not found on terrestrial radio, including live sports, news, talk/entertainment programming and commercial-free music. Selected news/talk channels may offer advertising on a limited basis. Sirius and XM Canada have recently rolled out online streaming products in addition to iPhone/iPod and BlackBerry listening applications.

Radio Data Sources

BBM CANADA/ SONDAGES BBM

1500 Don Mills Road – 3rd floor
Toronto, Ontario M3B 3L7
T: 416.445.9800
www.bbm.ca

BBM is the member-owned tripartite industry organization that has measured radio audiences across Canada since 1944. BBM provides broadcast measurement and consumer behaviour data to broadcasters, agencies and advertisers. These data are the currency on which radio airtime is bought and sold in Canada. BBM also has offices in Montreal, Richmond and Moncton.

Radio Audience Measurement

BBM measures radio audiences using two different methodologies – paper diaries and portable people meters (PPMs). Diaries are used to collect data on single weeks of tuning by individuals age 12+, for selected weeks of the year. Over 100 markets are measured for eight weeks in the fall, with larger markets measured for eight additional weeks in the spring. Tuning is recorded in the diary in 15-minute increments from 5 a.m. to 1 a.m. The diaries also capture selected information on product usage and lifestyle.

PPMs are used to measure radio audiences in Vancouver, Calgary, Edmonton, Toronto and Montreal. PPMs are small pager-like devices carried by a representative panel of persons age 2+. They passively record exposure to radio programming and advertisements by picking up inaudible codes embedded in the broadcasts. Data are captured every hour of every day and can be reported in increments as small as a single minute.

Radio Reports

BBM produces a number of different reports analyzing various aspects of radio tuning.

THE REACH REPORTS provide an overview of all measured Canadian areas, showing top-line reach and share of hours for all reported radio stations.

THE RADIO DATA BOOK provides an overview of national, provincial and local radio tuning based on the latest fall radio survey and the previous four fall surveys, painting a portrait of radio tuning habits.

THE RADIO GEOGRAPHICAL REFERENCE GUIDE contains detailed provincial and market maps, with Statistics Canada population estimates for each reported age/gender subgroup in every BBM defined area and market. It also contains populations for counties and provinces.

THE RADIO STATION GUIDE (RSG) contains information on radio stations, such as radio station profiles, profile changes, station groups, special geographies, format names and more.

THE RADIO TECHNICAL GUIDE (RTG) provides descriptions about recent technical and policy changes, five-year listening trend, quintiles trended over time and sample size and return rates.

BBM ANALYTICS

1500 Don Mills Road – 3rd floor
Toronto, Ontario M3B 3L7
T: 416.445.8881
www.bbmanalytics.ca

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AUDIENCE ANALYSIS BBM Analytics provides a variety of software applications for analyzing meter and diary radio audience data at the respondent and summarized level. Agencies use these tools in the planning, execution and reporting of radio campaigns.

CONSUMER STUDY The Return-to-Sample (RTS) study collects data on retail shopping, product consumption, lifestyle and psychographics from individuals who have completed a radio diary. The resulting database allows for cross-referencing of consumer behaviour against radio ratings in top markets.

NIELSEN MEDIA RESEARCH

160 McNabb Street
Markham, Ontario L3R 4B8
Phone: 905.475.9595
http://ca.nielsen.com

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RADIO MARKETING BUREAU (RMB)

The RMB was a resource centre for the radio industry for almost fifty years. It ceased operation in 2010 and will be succeeded by the formation of a yet-to-be announced new association.

Broadcast Commercial Acceptance

Radio and television commercials must follow certain federal and provincial acts and regulations, industry codes and advertising guidelines.

GENERAL RULES

1. All TV commercials on Telecaster member stations should have Telecaster approval. Please check with the Telecaster Services of TVB for guidelines, rules, regulations and associated costs. Go to: www.tvb.ca
2. Advertising intended for placement on CBC & Radio-Canada services requires prior approval from CBC Advertising Standards/Bureau du Code Publicitaire. Go to: http://cbc.radio-canada.ca
3. Advertising Standards Council (ASC) reviews all prescription and non-prescription drug advertising (including natural health products) directed to consumers. This ensures that all Health Canada regulatory requirements are met. Go to http://adstandards.com

TELECASTER CATEGORIES WITH SPECIFIC RULES

1. Telecaster will review a script/commercial that is directed at children, but will not assign a clearance number until the ASC provides a "Kids" pre-clearance number and all other requirements for Telecaster clearance have been met.
2. All food and non-alcoholic beverage advertising must comply with the Guide to Food Labelling and Advertising, plus the Food & Drugs Act and Regulations.
3. All beer and alcohol advertising must comply with the Canadian Radio-Television & Telecommunications Commission (CRTC) Code for Broadcast Advertising of Alcoholic Beverages.
4. All infomercials must receive clearance from Telecaster. There are specific guidelines to follow vis à vis visual content, disclaimers, etc. All advertisers must comply with the Code of Ethics and Standards of Practice of the Canadian Marketing Association.
5. Closed Captioning and "Billboard" messages are cleared by the individual networks/stations. Exception to the rule is when the CC or "Billboard" message contains a sell line, special offer, sales or product cost. In these cases, the spots will require Telecaster clearance.
6. All commercials pertaining to gambling (Canadian Indian reserves, bingo parlours, legitimate gambling casinos, Provincial Lottery Corporation products, home/hospital lotteries) are contingent on the Criminal Code (both federal and provincial) and the provincial licensing laws. Indemnity letter from advertiser is required by Telecaster stating there is compliance with all laws. "For fun" gaming web site advertising is treated separately by Telecaster and requires an "Undertaking Letter" from the advertiser and a Canadian Legal Opinion Letter, per point 4 of the Undertaking Letter.
7. Movies, DVD/videos, video games and some other commercials will receive ratings or time restrictions depending on the content of the commercial. Each commercial for video games must have an ESRB rating code before a Telecaster number can be issued.
8. Personal products (feminine hygiene, laxatives, personal lubricants and haemorrhoidal) must also comply with Telecaster approvals. Due to their sensitive nature there may be scheduling restrictions.
9. Direct Response commercials that advertise the price of the product or service advertised must clearly show the type of funds (U.S. or Canadian), applicable taxes and shipping and handling. If there is a money-back guarantee and the consumer must pay for return shipping, the addition of a video super indicating "Less S+H" is required. Compliance with Phone Service Guidelines is also mandatory, as well as all other Telecaster guidelines.
10. Phone Service commercials must follow the Phone Service Guideline in addition to all of the other appropriate Telecaster Guidelines.
11. Comparative advertising must follow the Comparative Advertising Guideline in addition to all of the other appropriate Telecaster Guidelines.
12. Contests and prizes must abide by Canadian laws. Telecaster will require a letter from the advertiser/agency confirming that positive legal advice was obtained.
13. Election advertising must clearly identify the person, corporation, trade union, registered party or registered constituency association paying for the commercial over a minimum of 3 seconds.
14. Issue and Opinion advertising also has a number of criteria to follow. All must have Telecaster approval.
15. Text Message commercials must follow the Text Message Guideline in addition to all of the other appropriate Telecaster Guidelines.
16. High Definition (HD) commercials and Standard Definition (SD) commercials must be assigned individual Telecaster approval numbers. When making an SD and an HD submission, Telecaster only needs to view the HD version, per the Telecaster High Definition Guideline.

PRE-CLEARANCE ORGANIZATIONS

ADVERTISING STANDARDS CANADA (ASC)

ASC helps to ensure the integrity and viability of advertising through industry self-regulation. As Canada's advertising self-regulatory body, ASC administers the Canadian Code of Advertising Standards (Code), the principal instrument of advertising self-regulation in Canada. The Code sets the criteria for acceptable advertising and forms the basis for the review and adjudication of consumer and trade complaints.

ASC Clearance Services provides an effective and efficient fee-based advertising review mechanism for advertising in five regulated categories:

- Children's advertising
- Food and non-alcoholic beverages
- Alcoholic beverages
- Non-prescription drugs, natural health products and direct-to-consumer advertising and information regarding disease states
- Cosmetics

Advertising preclearance helps ensure advertisements meet specific legislative, regulatory and/or sectoral industry guideline requirements. Go to www.adstandards.com/clearance for more information.

CONTACT:
TORONTO OFFICE
Advertising Standards Canada
175 Bloor Street East, South Tower
Suite 1801
Toronto, ON M4W 3R8
Tel: 416-961-6311
Fax: 416-961-7904

MONTREAL OFFICE
Les normes canadiennes de la publicité
4832 rue Sherbrooke ouest
Bureau 130

Montreal, QC H3Z 1G7
Tel: 514-931-8060
Fax: 514-931-2797

MIJO CLEARANCES
MIJO Clearances is a bilingual advertising clearing house. It provides copy review within the time frame specified and then assigns clearance numbers to the acceptable copy.
MIJO Clearances reviews both English and French materials under applicable acts, codes and guidelines in all of the following categories:

- Food and non-alcoholic beverages
- Alcoholic beverages
- Cosmetics
- Consumer Drug Products
- Natural Health Products.

"Route to" services include facilitating approvals from the Telecaster Committee and Ad Standards department of the CBC.
Go to www.mijo.com

CONTACT
Tel: 416-964-7539
Toll free: 1-800-387-0644
Email: clearances@mijo.com

CLEARANCE ORGANIZATIONS

CBC ADVERTISING STANDARDS BUREAU/ RC BUREAU DU CODE PUBLICITAIRE

Commercials intended for airing on CBC/RC services must meet the Corporation's advertising presentation standards in word, tone and scene to ensure all is in good taste, truthful and non-exploitive of children. CBC/RC requires ASC approval for non-prescription drugs prior to seeking approval from CBC Advertising Standards Bureau/RC Bureau du Code Publicitaire. Script consultations are recommended prior to production. CBC does not charge for approval services.
An overview of CBC/RC policies is available at http://cbc.radio-canada.ca.

CONTACT, ENGLISH COMMERCIALS
Courier Address:
CBC Advertising Standards
Canadian Broadcasting Centre
Room 6H202
205 Wellington Street W.
Toronto, ON M5V 3G7

Mailing Address:
P.O. Box 500, Station "A"
Room 6H2002
Toronto, ON M5W 1E6
Tel: 416-205-7344
Fax: 416-205-2815

CONTACT, FRENCH COMMERCIALS
Courier Address:
Maison Radio-Canada
20e étage
1400, boul. René-Lévesque est.
Montréal, QC H2L 2M2

Mailing Address:
Case postale 6000
Montréal, QC H3C 3A8
Tel: 514-597-4249
Fax: 514-594-4684

CANADIAN RADIO-TELEVISION AND TELECOMMUNICATIONS COMMISSION (CRTC)
Established by parliament in 1968, the CRTC derives its authority of broadcasting from the Broadcasting Act of 1991. It is vested with the authority to regulate and supervise Canadian broadcasting and telecommunications. Its mandate is to enforce Parliament's intent that the national broadcasting system serves the national purpose.

For alcoholic beverage advertising, compliance with the Broadcast Code for Advertising Alcoholic Beverages is a condition of broadcast license for all broadcast stations in Canada. Pre-clearance is performed by independent agencies recognized by the CRTC.

CONTACT:
Phone: 819-997-0313 or 1-977-249-2782,
Toronto 416-952-9096
crtc.gc.ca

HEALTH CANADA
Health Canada is the national regulatory authority for drug advertisements. It provides policies to effectively regulate marketed health products, puts in place guidelines for the interpretation of the Regulations and oversees regulated agencies. Drug advertisements are reviewed and pre-cleared by independent agencies recognized by Health Canada: ASC and PAAB.
Go to http://hc-sc.gc.ca

CONTACT:
Advertising Standards Canada
Director, Consumer Drug Section
175 Bloor Street East
South Tower, Suite 1801
Toronto, Ontario M4W 3R8
Telephone: (416) 961-6311
Fax: (416) 961-7904
Web site: adstandards.com

PHARMACEUTICAL ADVERTISING ADVISORY BOARD (PAAB)
Existing since 1976, the PAAB is the independent review agency whose primary role is to ensure that healthcare product communication is accurate, balanced and evidence-based, and reflects current and best practice. The scope of the PAAB includes promotional healthcare product communication for prescription, non-prescription, biological, vaccines and natural health products directed to healthcare professionals in all media.
Since 1990, PAAB has provided advisory comments on direct-to-consumer materials for prescription drugs and vaccines in all media. PAAB advisories for television ads are recognized by the CBC and Telecaster.
Go to www.paab.ca

CONTACT:
Pharmaceutical Advertising Advisory Board
375 Kingston Rd., Suite 200
Pickering, Ontario L1V 1A3
Telephone: (905) 509-2275
Fax: (905) 509-2486

TELECASTER SERVICES OF TVB
Most television stations require that commercials, infomercials and public service announcements receive a Telecaster clearance number before airing. This is the final clearance prior to airing, so any other required clearances must be done first. The Telecaster service has existed since 1973 and was formed as a voluntary, self-governing clearance committee. Its primary function is to review advertising messages to ensure they comply with Telecaster Guidelines. As well, staff provide assistance to advertisers regarding general interpretation of guidelines prior to production or telecast. Telecaster Services recommends that scripts or storyboards be submitted at www.tvb.ca for preliminary review before production to minimize the risk of rejection of a produced commercial. The final production is required before a Telecaster number can be issued. Please check with Telecaster for fee schedules. Rarely is a commercial cleared by Telecaster and then rejected by a participating station, but guidelines are voluntary and collective and may be superseded by individual network or station policy.
Guidelines are available at www.tvb.ca

CONTACT:
Television Bureau of Canada
Telecaster Services
160 Bloor Street East
Suite 1005
Toronto, Ontario
M4W 1B9
Phone: 416-923-8813
Fax: 416-413-3877
E-mail: tvb@tvb.ca
Web: www.tvb.ca

CONTACT LIST:
http://www.tvb.ca/pages/TCEContact.htm/

NEWSPAPERS – DAILIES & COMMUNITY PAPERS

Canadian newspapers and their sites are strong. We are presented with lots of negative statistics that source from newspapers in the United States, but in Canada, newspapers are buoyant. There are almost 100 dailies and over 1,100 community newspapers – roughly the same number as there were 10 years ago. NADbank (2009) and ComBase (2008/2009) reveal that newspaper print readership is stable and has been over the past five years. And print newspapers continue to be the largest ad medium in Canada, representing 24% of all advertising dollars spent.

Newspaper reach continues to be impressive. According to NADbank, almost half of Canadians read printed daily newspapers each weekday and over the course of a week daily newspaper readership climbs to three quarters of Canadian adults. ComBase also reports that 74% of Canadians are community newspaper readers* and that nine out of ten adults read newspapers (daily or community) either in print or online**. Newspapers also also help advertisers reach specific target groups very effectively.

Print newspaper readers notice the ads. A whopping 75% of newspaper readers indicate that they browse the ads.[1] Research finds newspapers ads are also more engaging – scoring 18% higher than average when compared to TV, radio and the Internet.[2] In addition, 73% of Canadian newspaper readers have been influenced to buy something as a result of an ad in a printed newspaper.[1] Finally, and most importantly, newspapers provide a strong return on investment (ROI). BrandScience (UK) studied 400 retail case studies to determine ROI. For every $1 spent, the ROI was twice as high for newspapers (£6.23) vs. TV and Outdoor (£3.57 each).

Online readers want content (i.e. any source that creates original content such as newspapers, magazines or TV). Forty-two percent spend their time online on content sites vs. communications such as email (27%) and social networking such as Facebook or Twitter (13%).[3]

Online newspaper readership grows every year. Currently 30% of all Canadians visit a newspaper site or hub* in a given week.[4] Reading a newspaper online or in print is not a one or the other decision. Actually 80% of Canadians that read a newspaper online also read a print newspaper.[4]

Newspaper web sites are very effective. Seventy-five percent have seen something on a Canadian newspaper site and have gone online to find out more.[1] Furthermore, research indicates that ads outperform on newspaper websites – performing better than ads on other sites, such portals, on all 47 metrics studied.[3]

Moving forward, there are many exciting opportunities for newspapers. On the print side, more colour is being added. And creatively shaped ads and placements are being used by newspaper advertisers more and more to enhance their messages. Print ads are becoming more interactive through QR and scan codes, as well as augmented reality (i.e. holding the paper up to a web cam where the ad comes to life).

On the electronic side, e-readers including the iPad offer an exciting platform for news (and ad) delivery. Online video and mobile also continue to grow and offer unique ad opportunities.

The future is news delivered on any device Canadians want it – in paper, on their computer or mobile. It is a very exciting time for news media!

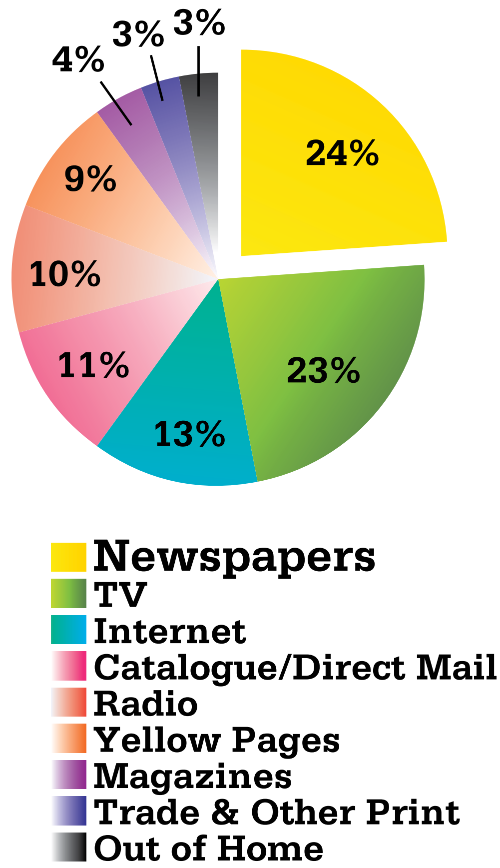
* hub = umbrella sites housing individual newspapers
(e.g. CanWest publishes Canada.com; Quebecor, Canoe.ca and Gesca, Cyberpresse.ca)
*read any of the last four editions of local community newspaper
** read any newspaper online in the last week/read any of the last four community newspaper issues/read any of the last five weekday daily newspaper issues

1 Ipsos Reid 2010
2 Nielsen research (US)
3 Online Publishers Association 2009
4 NADbank 2010

CANADIAN NEWSPAPER ASSOCIATION / ASSOCIATION CANADIENNE DES JOURNAUX

CANADIAN Community Newspapers ASSOCIATION

Canadian Media Industry 2009



Source: TVB, TD Newcrest estimates, Jan. 2010

Driver...to online

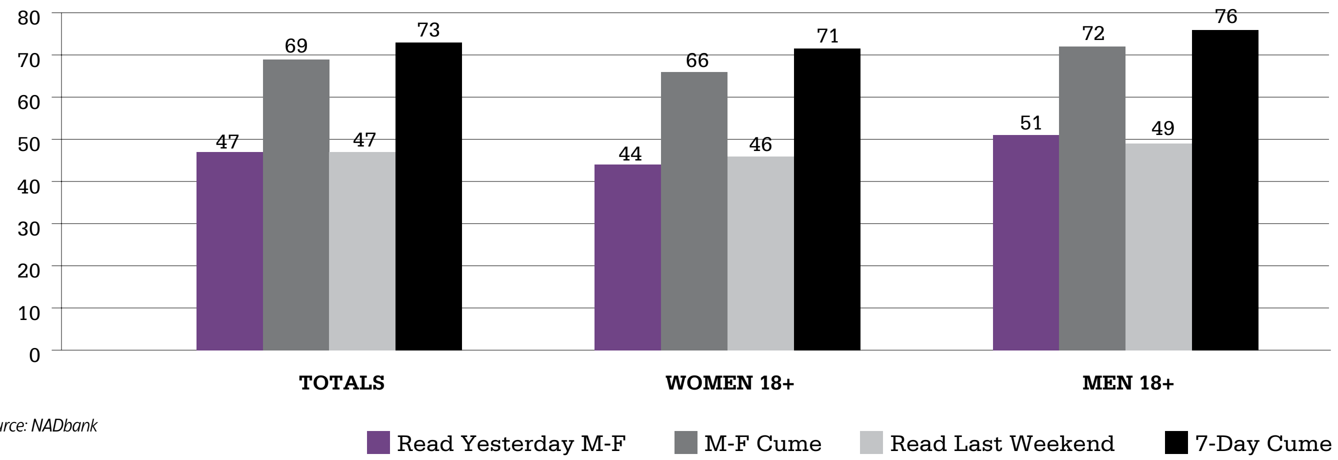
I have gone online to find out more about something that I have seen in a print newspaper

To what extent do you agree or disagree with the following statements:Base: Newspaper readers n=669

Ipsos Reid for the CNA, 2010

Daily Newspapers

% National Readership: 54 Markets, Adults 18+



Source: NADbank

DISTRIBUTION

Newspaper markets	**91**
Number of daily newspapers	**123**
Number of national newspapers*	**2**
Total circulation	**5.9 million**

** The National Post has limited distribution of the printed product in Atlantic and Man/Sask.*

Source: CARDonline, June 2010

CONSUMPTION

1 week reach	**73%**
Time spent reading Mo-Fr	**46 minutes**
Time spent reading weekend	**86 minutes**

Source: NADbank, 2009

GENERAL INFORMATION

- There are currently 123 daily newspapers in Canada.
- Thirteen are French-language papers, 110 are English-language papers.
- Gross daily circulation represents a household penetration of 44%.
- There are 11 free dailies in 6 major markets. Another 12 free dailies are published by Black Press and distributed in regional B.C. markets.
- Online readership of daily papers continues to grow.
- Offset printing is used for almost all of the dailies.

FORMATS

- Agate is the standard measurement unit for most newspapers. There are 14 agate lines per inch of depth. Width is generally measured in columns, which vary by newspaper. Columns x lines = total agate linage.
- Modular advertising involves selling ads by standardized sizes, e.g., ½ page vertical, vs. columns and lines. As of press time, 17 papers have moved to modular pricing.

There are two basic newspaper formats:

BROADSHEET

- A broadsheet page ranges from 10 inches to 11 7/8 inches wide by 20 inches to 22 inches deep. A number of papers have recently reduced page size in response to high newsprint costs.
- There are 72 broadsheets varying from 6 to 12 columns, with a 10-column format common to many.
- Full page linage ranges from 1800 to 3480 agate lines.

TABLOID

- A tabloid page is generally 10 inches to 10 3/8 inches wide and 11 3/8 inches to 14 1/2 inches deep. An exception is *t.o.night*, Toronto's newest free afternoon daily, which is a compact 7 5/8 inches x 10 1/4 inches. As with broadsheets, several tabloids have also recently trimmed paper size as a cost cutting measure.
- There are 51 tabloids with the number of columns ranging from 5 to 10.
- Full page linage ranges from 1050 to 2000 lines.

DAILY NEWSPAPER CIRCULATION & COST BY REGION

	Atlantic	Quebec	Ontario	Prairies	BC & Yukon	Total
Number of Markets	13	6	34	14	24	91
Number of Dailies	14	13	44	21	31	123
Circulation	352,672	1,276,638	2,569,698	891,780	818,388	5,909,176
Full Page B/W ($ Net)	63,205	109,793	429,176	142,001	109,372	853,547
Full Page Colour ($ Net)	76,094	137,565	498,876	163,831	128,597	1,004,963

Source: CARDonline June 2010

DAILY NEWSPAPER CIRCULATIONS AND COSTS BY POPULATION GROUP

	1 M+	500M-1M	100M-500K	50M-100K	Under 50K	Total
Number of Markets	6	3	26	23	34	92
Number of Dailies	30	5	30	24	34	123
Circulation	4,009,376	465,078	917,324	318,951	198,447	5,909,176
Full Page B/W ($ Net)	456,867	56,005	188,345	73,250	79,080	853,547
Full Page Colour ($ Net)	538,304	65,947	219,236	86,625	94,851	1,004,963

Source: CARDonline June 2010

DAILY NEWPAPER READERSHIP – ADULTS 18+ PROFILES BY REGION (%)

	Atlantic	Quebec	Ontario	Prairies	BC & Yukon	Total
Men	48	54	53	52	52	48
Women	52	46	47	48	48	52
18-24	8	10	10	10	10	10
25-34	13	15	13	14	14	14
35-49	25	27	27	28	27	27
50-54	11	10	10	10	10	10
55-64	20	17	18	18	17	18
65+	23	21	23	20	22	22

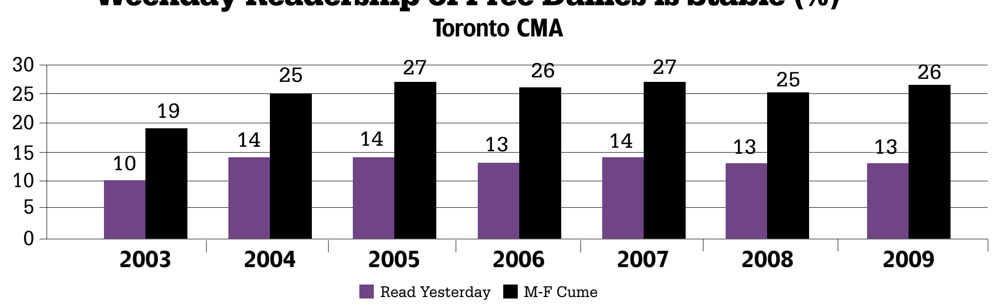
Source: NADbank 2009

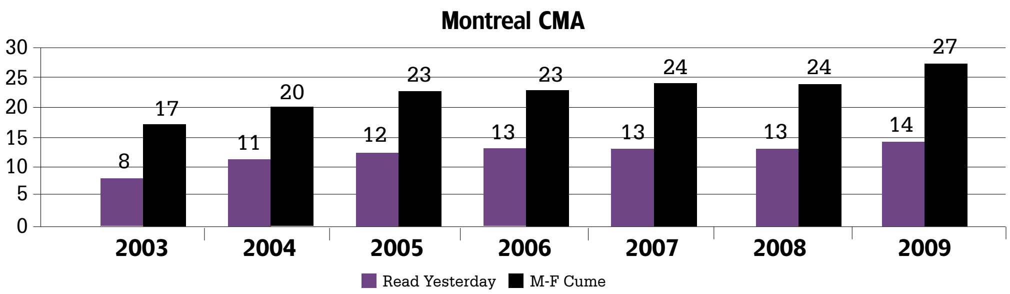
READERSHIP BY REGION – ADULTS 18+ (%)

	Atlantic	Quebec	Ontario	Prairies	BC & Yukon	Total
Read yesterday	50	47	45	48	52	47
M-F Cume	75	67	67	71	73	69
Read Last Weekend	53	49	46	49	42	47
7-Day Cume	78	73	72	75	74	73

Source: NADbank 2009

Weekday Readership of Free Dailies is Stable (%)





Source: NADbank 2009

Booking and Cancellation

As a general rule, on-page ads must be booked or cancelled before noon, two days prior to publishing. In the case of special sections, which are preprinted, the bookings and cancellations may need to be made one or two weeks in advance. Longer lead times of two to three weeks are needed for optimal positioning, especially for colour ads. Flexform, gatefolds, wraps and inserts may require much longer lead times.

AD TYPES

- **ROP COLOUR** Run of Press colour is available in virtually all daily papers. Cost premiums vary by publication and minimum linage requirements range from zero to 1,000 lines.
- **INSERTS** can be carried by most papers. The cost varies according to the number of pages, the size of the insert, paper type and whether it is machine or hand inserted.
- **FLEXFORM** is any odd-shaped ad that does not conform to standard sizing, e.g., the ad may be placed around editorial in a variety of ways. Flexform is available in many dailies and usually carries a cost premium.
- **WRAPS AND GATEFOLDS** A multi-page ad that wraps around the paper (tabloid) or a section (broadsheet), including the front section. Often includes a partial page. Gatefolds can also be placed within a section.
- **GUARANTEED POSITIONING** Many positioning guarantees carry a premium charge.

DAILY READERSHIP BY INCOME

Annual HH Income	%	Index to Pop
$75M+	47	107
$50 to $75M	25	99
$30 to $50M	15	99
$20 to $30M	8	90
Under $20M	5	74

DAILY READERSHIP BY EDUCATION

Highest Level Achieved	%	Index to Pop
University Grad+	36	110
Some Post-secondary	33	98
Graduate High School	19	95
Some High School or Less	10	89

Source: NADbank 2009

Market Size Publication Detail

1 M+	
Newspaper	**Total Circ. (M-F)**
Toronto Star	390,163
The Globe and Mail (National)	304,967
Le Journal de Montréal	266,160
Metro Toronto	258,858
24 Hours Toronto	247,236
La Presse (Montréal)	206,921
Vancouver Sun	182,823
Toronto Sun	178,461
National Post	177,989
Montreal Gazette	173,757
Vancouver Province	164,411
24 heures (Montréal)	143,008
Métro Montréal	142,154
Metro Vancouver	140,000
Calgary Herald	137,174
Ottawa Citizen	130,233
24 Hours Vancouver	122,230
Edmonton Journal	111,962
Edmonton Sun	55,955
Metro Calgary	55,000
Metro Edmonton	55,000
Metro Ottawa	50,000
t.o.night (Toronto)	50,000
Calgary Sun	48,948
Ottawa Sun	46,052
24 Hours Calgary	39,584
Le Droit (Ottawa/Gatineau)	37,311
24 Hours Ottawa	32,568
24 Hours Edmonton	31,612
Le Devoir (Montreal)	28,839
Total 1M+ Markets	**4,009,376**

500K-1M	
Newspaper	**Total Circ. (M-F)**
Winnipeg Free Press	122,465
Le Journal (Quebec City)	111,721
Hamilton Spectator	101,979
Le Soleil (Quebec City)	78,740
Winnipeg Sun	50,173
Total 500K-1M Markets	**465,078**

100-500K	
Newspaper	**Total Circ. (M-F)**
Halifax Chronicle Herald	108,130
London Free Press	76,151
Victoria Times Colonist	63,722
Kitchener Waterloo Regional Record	63,465
Windsor Star	61,898
Saskatoon StarPhoenix	53,109
Regina Leader Post	48,213
Le Nouvelliste (Trois Rivieres)	44,085
Moncton Times & Transcript	35,569
Metro Halifax	35,000
La Tribune (Sherbrooke)	34,113
Saint John Telegraph Journal	32,688
St. Catharines Standard	32,473
St. John's Telegram	26,266
Thunder Bay Chronicle Journal	25,736
Peterborough Examiner	24,929
Kingston Whig-Standard	22,892
Lethbridge Herald	18,051
Sudbury Star	15,466
Red Deer Advocate	14,423
Kelowna Daily Courier	13,149
Guelph Mercury	13,049
Victoria News Daily	10,000
News Bulletin/Daily (Nanaimo/Parksville/QB)	8,000
Barrie Examiner	7,825
Nanaimo Daily News	6,630
Kelowna Capital News Daily	6,500
Surrey Leader Daily	6,000
Abbotsford News Daily	5,200
Sherbrooke Record	4,592
Total 100-500K Markets	**917,324**

50K-100K	
Newspaper	**Total Circ. (M-F)**
Le Quotidien (Chicoutimi)	27,655
Cape Breton Post (Sydney)	23,806
Fredericton Daily Gleaner	20,892
North Bay Nugget	19,521
Charlottetown Guardian	19,118
Sault Ste. Marie Star	18,337
Brantford Expositor	18,290
Cornwall Standard-Freeholder	15,910
Niagara Falls Review	15,419
Prince George Citizen	15,126
La Voix de l'Est (Granby)	14,893
Sarnia Observer	14,347
Brandon Sun	13,969
Welland Tribune	13,443
Kamloops Daily News	12,237
Medicine Hat News	11,993
Belleville Intelligencer	11,606
Chatham Daily News	9,305
Grande Prairie Daily Herald-Tribune	5,699
Comox Valley/Campbell River Daily	4,500
Vernon Morning Star Daily	3,500
Kamloops This Week Daily	3,400
Chilliwack Progress Daily	3,200
Fort McMurray Today	2,785
Total 50-100K Markets	**318,951**

UNDER 50K	
Newspaper	**Total Circ. (M-F)**
L'Acadie Nouvelle (Caraquet)	20,314
Owen Sound Sun Times	13,519
Orillia Packet and Times	9,802
Brockville Recorder and Times	9,615
Timmins Daily Press	9,300
Stratford Beacon-Herald	8,320
Summerside Journal Pioneer	8,309
Moose Jaw Times-Herald	7,503
Penticton Herald	7,131
Woodstock Sentinel-Review	7,000
New Glasgow News	6,988
Corner Brook Western Star	6,863
Simcoe Reformer	6,572
Prince Albert Daily Herald	6,095
Truro Daily News	5,800
Pembroke Daily Observer	5,621
Cranbrook Daily Townsman	5,400
Trail Daily Times	5,224
St. Thomas Times-Journal	4,628
Prince Rupert Daily News	4,620
Alberni Valley Times (Port Alberni)	4,206
Northumberland Today (Cobourg/Port Hope)	4,005
Alaska Highway News (Fort St. John)	3,880
Peace Arch News Daily (White Rock)	3,200
Kenora Daily Miner & News	3,037
Cowichan Valley News Leader Pictorial Daily	3,000
Amherst Daily News	2,929
Nelson Daily News	2,630
Fort Frances Daily Bulletin	2,400
Whitehorse Star	2,397
Dawson Creek Daily News	2,200
Portage La Prairie Daily Graphic	2,067
Kimberley Daily Bulletin	1,972
Bulkley Valley Northern Daily	1,900
Total <50K Markets	**198,447**

Source: CARDonline June 2010

Daily Newspaper Data Sources

CANADIAN NEWSPAPER ASSOCIATION

890 Yonge St., Suite 200
Toronto, ON M4W 3P4
Phone: (416) 923-3567
Fax: (416) 923-7206
E-mail: info@cna-acj.ca
cna-acj.ca

The Canadian Newspaper Association represents newspapers published in English and French. A non-profit organization, the CNA works with its board of directors and several committees composed of newspaper representatives across Canada to serve the industry in three main areas: public affairs, marketing and member services.

NADBANK – NEWSPAPER AUDIENCE DATABANK

890 Yonge Street, Suite 200
Toronto, ON M4W 3P4
Phone: (416) 923-3369
Fax: (416) 923-4002
E-mail: mjohnston@nadbank.com

4366 rue St-Ambroise
Montreal, QC H4C 2C7
Phone: (514) 923-9720
Fax: (514) 935-6191
nadbank.com

NADbank (Newspaper Audience Databank) is the research arm of the Canadian daily newspaper industry. It designs and conducts research in Canadian urban markets to provide cost effective and accurate in-depth marketing information for its members to assist in the buying and selling of daily newspaper advertising in Canada.

NADbank is a tri-partite organization comprised of daily newspapers, advertising agencies, media buying companies and advertiser members. NADbank is governed by a board of directors and two operating committees.

NADbank Inc. now measures 13 free daily newspapers in seven major markets

AUDIT BUREAU OF CIRCULATIONS (ABC)

151 Bloor St. W., Suite 850
Toronto, ON M5S 1S4
Phone: (416) 962-5840
Fax: (416) 962-5844
Email: joan.brehl@accessabc.com
accessabc.com

ABC is a not-for-profit, tripartite association of advertisers, advertising agencies and publishers.

The purpose of ABC is to set standards by which circulation and other data of member newspaper and magazine publishers may be audited; verify facts and figures through field auditors' examination of all pertinent records; and report these facts and figures through regularly published, standardized reports. Reports include:

AUDIT REPORTS Annual verification of Publisher's Statements for periodicals– bi-annual study for daily newspapers with circulation under 25,000; bi-annual or group audits available for weekly newspapers.

PUBLISHER'S STATEMENTS Two statements of circulation issued yearly by publishers for release by the ABC.

COUPON DISTRIBUTION VERIFICATION AUDIT REPORTS Annual coupon audit reports providing data on coupon handling practices for daily newspapers.

CANADIAN NEWSPAPER CIRCULATION FACT BOOK Circulation data for Canadian daily newspapers by market, county and province.

MAGAZINE TREND REPORT Annual report providing circulation and ad rates trends for five years for all Canadian and U.S. magazine members.

WEB-BASED ANALYSIS TOOL FOR PERIODICALS AND NEWSPAPERS Providing 10 years of data, including Canadian circulation of U.S. magazines on the ePeriodical Tool.

ABCi A division of ABC that provides audits of traffic claims from sites on the web.

BPA WORLDWIDE

(Formerly Canadian Circulations Audit Board – CCAB)
bpaww.com

TORONTO OFFICE
90 Eglinton Avenue E.,
Suite 980
Toronto, ON M4P 2Y3
Phone: (416) 487-2418
Fax: (416) 487-6405

MONTREAL OFFICE
1010 rue Sherbrooke Ouest
Bureau 1800
Montreal, QC H3A 2R7
Phone: (514) 845-0003
Fax: (514) 845-0905

The CCAB division audits all paid, controlled or any combination of paid and controlled circulation for over 450 business and farm publications, consumer magazines and community and daily newspapers throughout Canada. CCAB issues standardized statements of data reported by members and verifies the figures shown in the statements by audit examination of any records considered necessary. Basic published reports include two Circulation Statements a year, submitted by the publishers' staff, and Bilingual ConsumerTRAC, Daily NewspaperTRAC and Community NewspaperTRAC trend reports published twice a year. In addition to these reports, CCAB provides flyer distribution accreditation on behalf of the Flyer Distribution Standards Association, whose goal is to establish standards, from technical specifications to processes and terminology, for the retail flyer process.

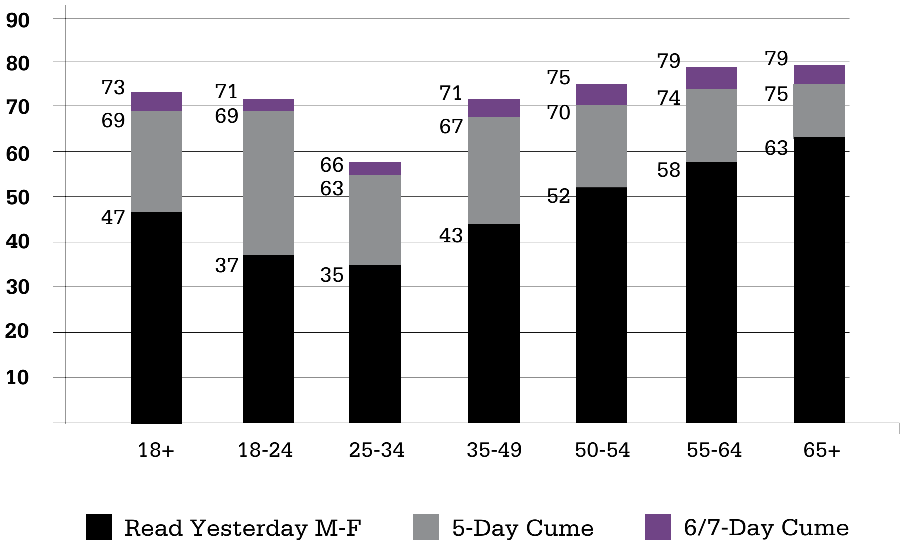
PMB and Newspapers

PMB audits several newspapers. Data for each are listed below.

READERSHIP (12+)			
Newspapers	(000)	Circulation (000)	Readers Per Copy
Globe & Mail (M-F)	1,079	305	3.5
Globe & Mail (Sat)	1,183	375	3.2
National Post (M-F)	481	178	2.7
National Post (Sat)	548	154	3.6
Montréal Le Journal (l-v)	1,108	266	4.2
Montréal Le Journal (sam)	1,009	290	3.5
Montréal Le Journal (dim)	827	265	3.1
Metro Montréal	344	142	2.4
Montréal 24 Heures	260	143	1.8
Quebec City Le Journal (l-v)	344	112	3.1
Quebec City Le Journal (sam)	416	131	3.2
Quebec City Le Journal (dim)	268	115	2.3
Toronto Star (M-F)	1,410	390	3.6
Toronto Star (Sat)	1,746	567	3.1
Toronto Star (Sun)	1,150	348	3.3
Toronto Sun (M-F)	868	178	4.9
Toronto Sun (Sat)	582	148	3.9
Toronto Sun (Sun)	751	282	2.7
Toronto Metro	656	259	2.5
Toronto 24 Hours	363	247	1.5
Vancouver Metro	210	122	1.7

Source: PMB 2010

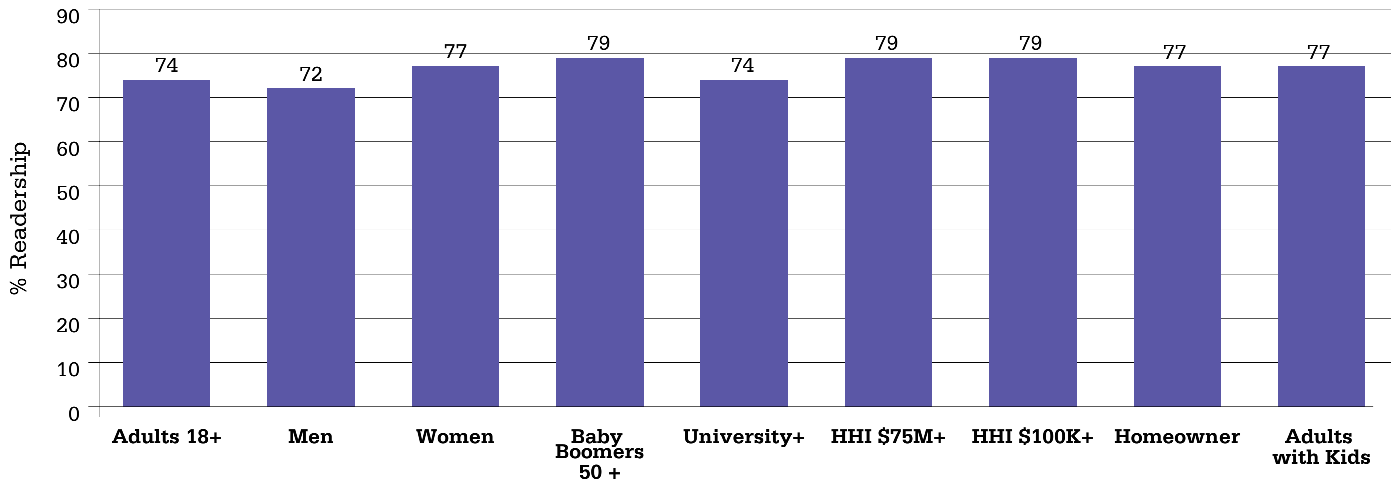
Daily Newspaper Readership by Age (%)



Source: NADbank 2009

Community Newspapers

% Readership by Demographic



Source: ComBase 2008–2009. Base: Adults 18+, Canada. Read any of the last four issues.

GENERAL INFORMATION

The community newspaper industry is vibrant–and large. Across Canada, every week, more than 1,100 titles circulate more than 15 million copies in communities large and small. Community newspapers offer the ability to reach Canadians in a way that other national media cannot. The role they play is vital, often being the only choice for local news and information relevant to readers in the community.

Distribution

Number of papers	**1,100+**
Total circulation	**15 million**

The relationship between community newspapers and their readers is a loyal one. On average, one third do not read anything else, and most readers read every issue, cover to cover.

Readership of community newspapers remains solid, with 74% of adults reading a community newspaper every week. They also reach more women (77%) than any other medium.

Community newspapers reach all upscale demographics—well-educated, affluent consumers—as well as families with children and homeowners. Paid versus free circulation is not a factor in readership.

Community newspapers are committed to the environment, promoting recycling and reusing, and adopting practices to reduce their carbon footprint: using newsprint from certified Canadian suppliers (those that do not participate in illegal logging); using a more energy-efficient production process; and using vegetable-based inks.

QUICK FACTS

The majority of community newspapers serve English- or French-speaking readers in geographic markets that are represented by the Canadian Community Newspapers Association (CCNA) and its French-language counterparts, Hebdos Québec and the Association de la presse francophone.

While column widths and number of columns vary by publication in broadsheet or tabloid format, a growing use of modular advertising is simplifying the buying process.

Run of press (ROP) colour is available in most community newspapers. Cost premiums vary by publication and ROP colour is subject to minimum lineage requirements.

Inserts and advertising supplements can be carried in most newspapers. Costs vary according to both the page count or weight, and size of the insert. The newspapers will insert either by hand or machine and this cost is included in the rate. Many papers with their own printing facilities can produce these supplements to customer specifications.

Almost all community newspapers are weeklies and generally the material and space closing dates range from one week to two days prior to the publishing date. However, an insert requires more lead time, therefore, booking is

COMMUNITY NEWSPAPERS - DEMOGRAPHICS	
Adults 18+	74%
GENDER	
Male	72%
Female	77%
AGE	
Young Readers 18-24 years	60%
Age 25-49 years	73%
Baby Boomers 50+ years	79%
EDUCATION	
High School or less	73%
College (including Technical)	77%
University +	74%
HOUSEHOLD INCOME	
<$30K	65%
$30-$49K	75%
$50K+	78%
$75K+	79%
$100K+	79%
RESIDENCE	
Own Residence	77%
Rent Residence	64%
FAMILY STATUS	
With children	77%
Without children	73%
LIFE EVENTS (occurred in last year/next year)	
Marriage	73%
Child/Grandchild born	74%
Retire	78%
Change job	69%
Move (same city)	71%

REASONS FOR READING

Reasons for Reading	% of Community Newspaper Readers
Local Events	63%
Flyers	36%
Editorial	35%
Classified	33%
Advertising	31%
Real Estate	22%
Jobs/Employment	19%

Source: ComBase 2008–2009. Base: Adults 18+, Canada. Read any of the last four issues.
**Multiple mentions accepted*

required about two weeks prior. The produced insert normally needs to arrive a week prior to the insertion date. If a cancellation must occur and it is late, the publication will try to fill the space, but if they are unable to do so the advertiser may end up paying for the ad in full.

CIRCULATION

More than 650 community newspaper titles are measured by Canadian Media Circulation Audit (CMCA), a unit of CCNA. Circulation data are reported twice a year and verified annually by CMCA. An audit is conducted annually by an independent certified auditor or a public chartered accountant. CMCA data can be accessed online at www.circulationaudit.ca.

An additional 180 community newspapers are currently measured by Audit Bureau of Circulations (ABC) or Canadian Circulation Audit Board (CCAB). Circulation data are reported in a publisher's statement and then audited either annually or bi-annually. ABC data is available to members and can be accessed online at www.accessabc.com, while CCAB data is available at no cost at www.bpaww.com.

In Quebec, more than 140 community newspapers are measured by the Office de la distribution certifiée (ODC). Complete distribution data are available at no cost at www.odcinc.ca.

CANADIAN COMMUNITY NEWSPAPERS ASSOCIATION (CCNA)

Representing the community press in Canada for 90 years, the Canadian Community Newspapers Association is a federation of seven regional newspaper associations. Currently CCNA and its regional affiliates represent more than 770 community newspapers across Canada to advertisers, agencies, government and the general public.

The community newspaper industry provides several tools designed to inform and assist the ad buying process.

COMMUNITY MEDIA CANADA: CAMPAIGN CALCULATOR AND ONLINE RESOURCE

CCNA's Community Media Canada website includes an online campaign calculator that provides campaign estimates for up to 850 titles in both official languages and in a variety of ad sizes; direct contact information for national advertising representation services; Market Analyzer geo-targeting system; and PlanHebdo media planning tool for French-language markets in Quebec. For more information, visit www.communitymedia.ca.

MARKET ANALYZER: GEO-TARGETING TOOL

Market Analyzer is an on-line geographic information system (GIS) that merges socio-economic and demographic data with the physical coverage area of participating newspapers. The resulting data allow planners to assess newspapers and their markets based on various demographic, household spending or other targeting criteria as it relates specifically to the areas covered by each newspaper.

COMBASE: READERSHIP RESEARCH

Market-by-market readership research for individual community newspapers is available from ComBase, the Canadian Community Newspaper Database Corporation. ComBase is administered by a tri-partite board of directors representing advertisers, agencies and publishers.

The ComBase 2005 study includes title-specific data for 400+ Canadian markets on more than 1,000 publications, including community newspapers, ethnic and alternative press, auto trader and employment papers, shoppers, farm publications, dailies, entertainment publications and free publications, as well as over 1,000 radio stations.

ComBase's third national study is currently underway. The study will include 235 markets in almost all provinces. New questions have been included to capture data for online media behaviour, readership of online newspapers, reasons for using community newspapers, flyer usage and a number of life events. Complete data were expected to be released in late summer 2010. To learn more about ComBase, visit www.combase.ca.

HEBDOS QUÉBEC

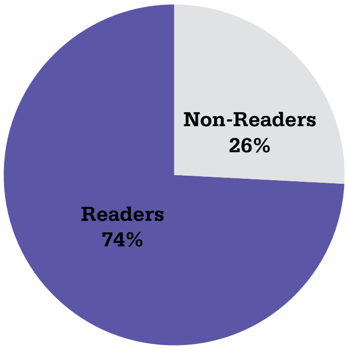
Hebdos Québec encompasses 150 French-language weeklies with a total Quebec readership of more than 3.6 million. To be a member of this organization, the publications must be certified by ODC Certified Distribution (ODC), Audit Bureau of Circulations (ABC) or Canadian Circulation Audit Board

READERSHIP OF FLYERS DELIVERED IN COMMUNITY NEWSPAPERS

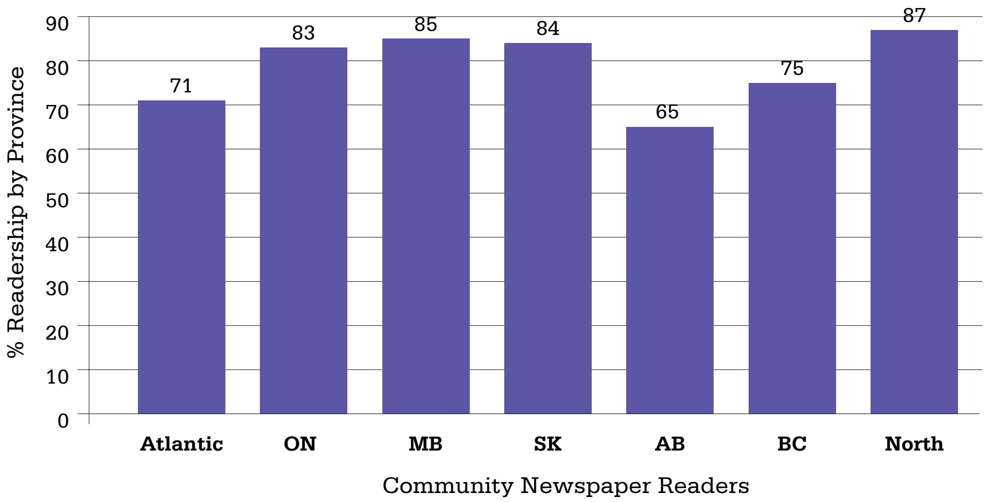
Flyer Type	% Readership of Flyers
Grocery Store	76%
Department Stores including Clothing	70%
Home Improvement Store	68%
Furniture or Appliances or Electronics	66%
Drug Store or Pharmacy	62%
Computer Hardware or Software	47%
Fast Food Restaurant	42%
Automotive Supply or Service	40%
Telecommunication & Wireless Products	31%
Investment or Banking Services	27%
Other Products or Services	57%

*Source: ComBase 2008–2009. Base: Adults 18+, Canada. Read any of the last four issues. *Always or sometimes read flyers*

Community Newspapers - Readership



Source: ComBase 2008-2009.
Base: Adults 18+, Canada. Read any of the last four issues of community paper / read any of the last five weekday issues of daily newspaper



*Source: ComBase 2008–2009. Base: Adults 18+, Canada. Read any of the last four issues. * Atlantic is NS/NB/PEI/NL ** Northern Canada is NWT/NU*

Major Corporate Owner (10+ papers)

Major Corporate Owner (10+ papers)	# of Titles by Province													Total # of Titles	% Share
	BC	AB	SK	MB	ON	QC	NS	NB	NL	PE	YT	NT	NU		
Independent Single (1 paper)	13	32	34	23	82	10	9	2	-	-	1	2	1	209	27.0%
Independent Group (2-9 papers)	4	20	14	14	36	5	9	1	-	4	-	4	2	113	14.6%
Sun Media Corporation	-	31	4	10	56	-	-	-	-	-	-	-	-	101	13.0%
Metroland Media Group	-	-	-	-	96	-	-	-	-	-	-	-	-	96	12.4%
Black Press Group	65	5	-	-	-	-	-	-	-	-	-	-	-	70	9.0%
Glacier Media Group	17	6	24	1	-	1	-	-	-	-	-	-	-	49	6.3%
G.T.C. Transcontinental Group	-	-	6	-	2	2	12	1	14	-	-	-	-	37	4.8%
Canwest Global Communications*	18	-	-	-	5	-	-	-	-	-	-	-	-	23	3.0%
Brunswick News	-	-	-	-	-	-	-	19	-	-	-	-	-	19	2.5%
Great West Newspapers	-	19	-	-	-	-	-	-	-	-	-	-	-	19	2.5%
Performance Printing	-	-	-	-	14	-	-	-	-	-	-	-	-	14	1.8%
Multimedia Nova Corporation	-	-	-	-	13	-	-	-	-	-	-	-	-	13	1.7%
Unknowns / No Information	2	-	1	-	8	-	-	-	-	-	-	-	-	11	1.4%
Total # of Titles	**119**	**113**	**83**	**48**	**312**	**18**	**30**	**23**	**14**	**4**	**1**	**6**	**3**	**774**	
% Share	**15.4%**	**14.6%**	**10.7%**	**6.2%**	**40.3%**	**2.3%**	**3.9%**	**3.0%**	**1.8%**	**0.5%**	**0.1%**	**0.8%**	**0.4%**		

Source: Canadian Community Newspapers Association
Ownership of CCNA members only
** now Postmedia*

(CCAB). Hebdos Québec is also a partner of Community Media Canada. For more information, visit www.communitymedia.ca.

StatHebdo: 2007 Readership and Consumption Patterns Study

The Léger Marketing market research firm conducted a large scale survey (30,200 respondents) of the Quebec population's reading habits; this was administered by Hebdos Québec and called StatHebdo. The survey focused on the readership rate of each member publication and identified the profile of the weeklies' readers. The StatHebdo survey also measured the readership rate of the dailies distributed in these markets, as well as the consumption patterns of the readers for a wide range of products and services. StatHebdo is the only media study that reports products and services usage for 150 different markets. Most other competitive media studies report their data only for major urban areas. For more information on the readership survey, visit www.hebdos.com.

PlanHebdo:
A web-based media planning tool

PlanHebdo brings together several different databases and is divided into three modules: readership data that provides useful information such as demographic profile and reach of daily newspapers in the distribution area of the weekly; product and service usage in 8 distinct economic sectors for 150 weeklies; and a campaign calculator that provides, in two easy steps, the estimated cost of a campaign.

ASSOCIATION DE LA PRESSE FRANCOPHONE

The French-language newspaper association L'Association de la presse francophone (APF) brings together 24 community newspapers from outside Quebec, and is the only pan-Canadian association of French newspapers. Most of the APF newspapers offer high standards of quality. For example, the circulation (total of 170,000) of all the newspapers is certified.

The APF website includes information about its member newspapers, as well as advertising resources. Ad campaigns can be placed through two advertising representation firms. For more information, visit www.apf.ca.

Community Newspaper Data Sources

CANADIAN COMMUNITY NEWSPAPER ASSOCIATION (CCNA)

890 Yonge Street, Suite 200
Toronto, ON M4W 3P4
E-mail: info@ccna.ca
communitynews.ca
For advertising: communitymediacanada.ca or call 1-866-669-2262

The CCNA represents 770 English-language community newspapers in Canada. The CCNA is a federation of seven regional/provincial associations. Community Media Canada is the advertising and promotions arm of the Canadian community newspaper industry. The association publishes information on the CMC website (communitymedia.ca). Advertising may be placed in member newspapers through CMC's one-stop service operated by the seven regional associations.

ComBase (Community Newspaper Database) measures newspapers of all types, in nearly 400 Canadian markets and sub-markets. ComBase provides title and market-specific audience information to assist in the buying and selling of community newspaper advertising space.

COMBASE
890 Yonge Street, Suite 200
Toronto, ON M4W 3P4
Fax: (905) 780-9469
Mobile: (647) 225-8766
combase.ca

ALBERTA WEEKLY NEWSPAPERS ASSOCIATION
3228 Parsons Road
Edmonton, AB, T6N 1M2
Phone: (780) 434-8746/ 1-800-282-6903
Fax: (780) 438-8356
E-mail: info@awna.com
awna.com

ATLANTIC COMMUNITY NEWSPAPERS ASSOCIATION
7075 Bayers Road, Suite 216
Halifax, NS B3L 2C2
Phone: 1-877-842-4480
Fax: (902) 832-4484
E-mail: mail@acna.com
acna.com

BRITISH COLUMBIA & YUKON COMMUNITY NEWSPAPERS ASSOCIATION
#122-1020 Mainland St.
Vancouver, BC V6B 2T4
Phone: (604) 669-9222/ 1-866-669-9222
Fax: (604) 684-4713
E-mail: info@bccommunitynews.com
bccommunitynews.com

QUEBEC COMMUNITY NEWSPAPERS ASSOCIATION
400 Grand Blvd., Suite 5
Ile Perrot, QC J7V 4X2
Phone: (514) 453-6300
Fax: (514) 453-6330
E-mail: info@qcna.qc.ca
qcna.org

MANITOBA COMMUNITY NEWSPAPERS ASSOCIATION
275 Portage Ave., Suite 600
Winnipeg, MB R3B 2B3
Phone: (204) 947-1691
Fax: (204) 947-1919
Toll-free in Manitoba: 1-800-782-0051
Toll-free in Canada: 1-866-669-2262, Ext. 3
E-mail: tanis@mcna.com
mcna.com

ONTARIO COMMUNITY NEWSPAPERS ASSOCIATION
3050 Harvester Rd., Suite 103
Burlington, ON L7N 3J1
Phone: (905) 639-8720
Fax: (905) 639-6962
E-mail: info@ocna.org
ocna.org

SASKATCHEWAN WEEKLY NEWSPAPERS ASSOCIATION
401 45th Street West, Suite 14
Saskatoon, SK S7L 5Z9
Toll-free in Saskatchewan:
1-800-661-7962
Phone: (306) 382-9683
Fax: (306) 382-9241
swna.com

HEBDOS QUÉBEC

538 Place St-Henri
Montreal, QC H4C 2R9
Phone: (514) 861-2088/ 1-866-861-2088
Fax: (514) 861-1966
E-mail: communications@hebdos.com
hebdos.com

Hebdos Québec is a non-profit corporation whose members publish 150-plus weekly French newspapers with over 3 million readers. The association's mandate is to foster and stimulate the development of weeklies. It has a readership study of weeklies in Quebec available on its website (hebdos.com).

CANADIANS LOVE THEIR MAGAZINES

Across multiple platforms—print, digital, web, mobile or iPad—magazines make the connection with readers in the most engaging ways. In a world where it's getting harder to meaningfully reach consumers without being ignored, irritated or shut out at the press of a button, magazines provide "win-win" solutions for both the advertiser and the consumer.

Research demonstrates how magazines connect in powerful ways. Magazines are:

- #1 in throwing *consumers* to *websites*
- #1 in *motivating web* searches
- #1 in *engagement*, servicing individual reader needs and passions with fresh content in every issue. Reading is viewed as *my time*
- #1 in increasing *brand favourability*, a positive shift in brand attitudes
- #1 in increasing *purchase intent*, arguably the hardest performance metric to shift

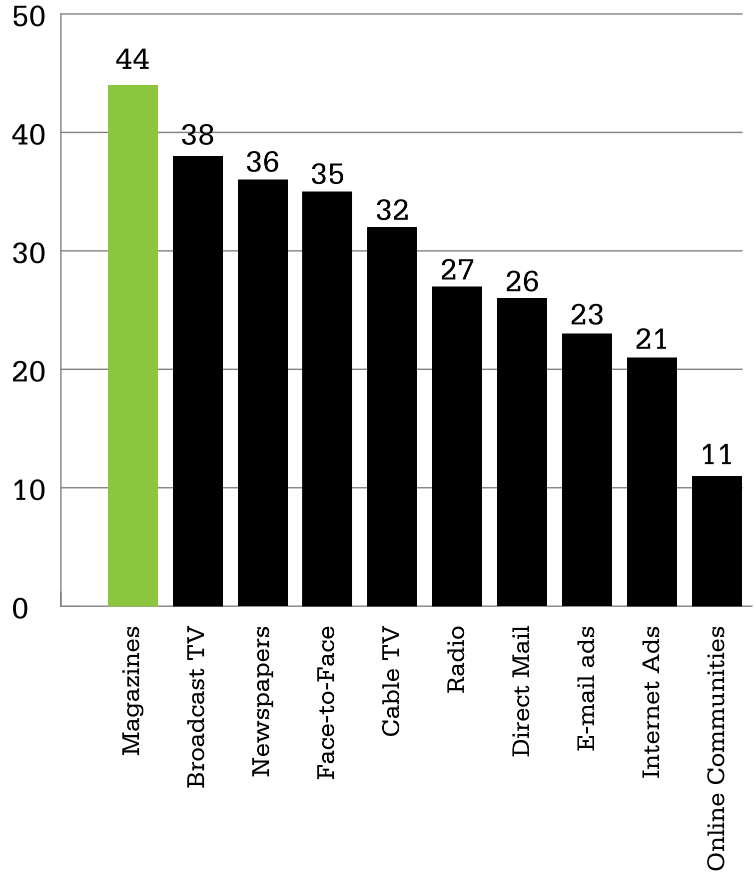
That's because:

- Consumers *pay attention* to magazine ads at the same level as television ads and more than other media
- Magazine ads are *viewed as a useful service*, not an interruption. Consumers read them almost as much as editorial
- Magazine ads *provide important details*; they tell the full brand story in a relevant, trusted environment
- Magazines provide *broad mass coverage and narrow, laser-like targeting* against geography, demographics, lifestyles and personal passions

Combine these benefits with a magazine's shelf life (messages work 24/7) and low production costs, and advertisers are assured of more bang for their media buck. Dollar for dollar, magazines pack the punch necessary to connect with and persuade Canadians to act!

Need more info to make an informed decision? Visit magazinescanada.ca and check out our updated *2010 Consumer Magazine Fact Book* or *Business Media Fact Book* for the latest facts on how magazines can be put to work for you. Or contact us at adinfo@magazinescanada.ca or 416-596-5318.

Top Media that Trigger Online Search (A18+)



Source: BIGresearch, Simultaneous Media Survey (SIMM 14) June, 2009

Consumer Magazines

Distribution

Consumer magazines	**1279**
Business/trade	**770**
Annual circulation	**770 million**

Source: Magazines Canada

Consumption

1 month reach	**77%**
1 week reach	**60%**
Readers per issue	**4.8**

Source: PMB Spring 2010

GENERAL INFORMATION

The wide variety and sheer number of Canadian magazines mirrors our diverse nation. With well over 1,000 consumer magazines listed in Canadian Advertising Rates and Data (CARD), divided into 200 categories, there is a Canadian consumer magazine to match each person's individual interests.

PMB 2010 UPDATES

The Print Measurement Bureau (PMB) is Canada's leading syndicated study for single-source data on a variety of subjects, including readership of consumer magazines. In the Spring 2010 study, readership information is provided for 67 English and 44 French consumer magazines. Titles being measured for the first time are *Hello* and *Zoomer.*

CREATIVE CONSIDERATIONS

A wide variety of standard creative formats exist within magazines and many more 'unique formats' are up to the discretion of the individual publishers. Research has been conducted by Magazines Canada around 'best practices' for magazines. Some findings conclude that being positioned on the left side or the right side of the magazine page makes little difference to the impact or recall of an ad. In addition, positioning within the book, be it up-front or in the back-end, also makes little-to-no difference. Larger format ads like a full page plus fractional or double page spread seem to be more impactful than smaller formats. For more general information about Canadian magazines, visit: magazinescanada.com

CLOSING DATES AND CANCELLATION POLICIES

Most national monthly magazines require insertion orders for colour advertisements four to six weeks prior to publication date. Many major national magazines are able to offer 35-day (or less) lead time from published space closing to first consumer impact. Material is generally due a week later. National weekly publications are often able to accommodate advertisers on significantly shorter notice.

Monthly magazines are on-stand and mailed to subscribers three to four weeks prior to the cover date; weeklies, one week prior. Orders previously booked are non-cancellable after the closing date. Refer to CARD, publication rate cards or your magazine sales representative for more specific information.

Common Formats
Full Page
Fractional Pages (1/2, 1/3, 2/3, 1/4, 1/6)
DPS, Half-page spread
Mini page
Guide page spread
Consecutive pages (direct or alternating)
IFC, IBC, OBC
Inserts
Polybags
BRC
Advertorial

Special Formats
Gatefolds (doubles, triples, side, bottom, top)
French Doors (on cover)
Bellybands
Ink Jetting
Special Inks (5 or 6 colour)
Glue-ons
Pop-ups
1/3 page centre spread
1/4 page checkerboard
1/3 page bookends (outer edges of spread)
Fragrance strips
Scratch & sniff
Page tabs
Cabbage heads (glued/dye cut extensions)
Peel & Reveal – Perforated tabs
Peel & Reveal – Stickers (like Advent calendar)
Static cling pages

Canadian Consumer/Business Magazines: Circulation & Readership: English (measured/reported in PMB 2010 Spring)

English Publications	Magazine Class	Circulation	Readership	RPC	PMB 2010 ALL 12+ Male	Female
Alive	Health & Fitness	189	527	2.8	142	385
British Columbia Magazine	City & Regional	88	1017	11.6	585	432
CAA Magazine	General Interest	1539	2386	1.6	1100	1287
Canadian Business	Business & Finance	91	1162	12.8	771	391
Canadian Family	Women's	91	856	9.4	283	573
Canadian Gardening	Gardening	153	1899	12.4	725	1174
Canadian Geographic	General Interest	210	3412	16.2	1844	1568
Canadian Health	Health & Fitness	42	1416	33.7	567	849
Canadian Health & Lifestyle	Health & Fitness	399	2176	5.5	814	1363
Canadian Home Workshop	Homes	109	960	8.8	612	348
Canadian House & Home	Homes	245	2363	9.6	710	1653
Canadian Living	Women's	513	3979	7.8	1095	2884
Chatelaine	Women's	586	3562	6.1	676	2886
Cottage Life	General Interest	71	798	11.2	439	359
Elle Canada	Women's	136	1623	11.9	203	1420
enRoute	General Interest	149	1030	6.9	614	416
Eye Weekly	City & Regional	108	216	2.0	152	64
Famous	Entertainment	650	1094	1.7	475	619
Fashion Magazine	Women's	153	1908	12.5	394	1514
Financial Post Magazine	Business & Finance	197	1113	5.6	805	308
Flare	Women's	156	1408	9.0	184	1224
Food & Drink	Food & Beverage	503	2205	4.4	914	1291
Glow	Women's	*	829	*	99	730
Golf Canada	Sports	129	1362	10.6	1061	301
Good Times	Mature Market	161	500	3.1	159	341
Harrowsmith Country Life	General Interest	124	757	6.1	296	461
Hello! Canada1	Entertainment	107	637	6.0	128	510
Homemakers	Women's	369	1477	4.0	320	1156
Hour	City & Regional	34	94	2.8	54	39
Loulou (Eng)	Women's	148	711	4.8	78	633
Maclean's	News	377	2370	6.3	1247	1123
MIRROR	City & Regional	59	119	2.0	78	41
MoneySense	Business & Finance	111	858	7.7	536	321
Movie Entertainment	Entertainment	462	1814	3.9	940	874
Now	City & Regional	106	363	3.4	228	135
Ontario Out of Doors	Fishing & Hunting	90	579	6.4	440	139
Our Canada	General Interest	300	989	3.3	372	617
Outdoor Canada	Fishing & Hunting	95	1548	16.3	1043	505
ParentsCanada	Women's	121	1183	9.8	305	878
People	Women's	168	3542	21.1	1124	2418
Professionally Speaking	Education	211	309	1.5	108	201
Profit	Business & Finance	123	273	2.2	201	71
Reader's Digest	General Interest	914	6360	7.0	2911	3449
Report on Business Magazine	Business	276	1270	4.6	942	328
Starweek	TV & Radio	608	830	1.4	425	405
Style at Home	Homes	227	1333	5.9	263	1070
The Beaver/Canada's History	General Interest	46	327	7.1	201	126
The Health Journal	Health & Fitness	*	1153	*	478	675
The Hockey News Magazine	Sports	91	2114	23.2	1677	437
Today's Parent	Women's	180	1678	9.3	392	1286
Toronto Life	City & Regional	95	739	7.8	403	336
Tribute	Entertainment	500	1590	3.2	797	793
TV Week Magazine	TV & Radio	67	227	3.4	83	143
Vancouver Magazine	City & Regional	48	318	6.6	190	128
Vervegirl	Youth	160	344	2.2	60	285
Western Living	Lifestyles	185	558	3.0	261	297
Westworld/Going Places	General Interest	1303	1477	1.1	721	756
what's cooking	Food & Beverage	1401	3541	2.5	902	2639
What's Up Family Magazine	Women's	87	369	4.2	97	272
Zoomer Magazine1	Mature Market	195	469	2.4	175	294

1 = Imputed 2 year data – See PMB 2010 Spring Technical Appendix

Circulation data in accordance with PMB requirements were not received. No readers-per-copy data are shown

Numbers in 000 except for RPC

U.S. MAGAZINES WITH PAID CANADIAN CIRCULATION OF 25,000+

Magazine Name	Total Pd & Ver Circ	Magazine Name	Total Pd & Ver Circ
National Geographic	363,946	Fitness	46,160
Cosmopolitan	265,990	J 14	46,041
People	183,720	Kids Fun Stuff To Do Together	45,983
Woman's World	135,246	Discover	45,288
Prevention	130,525	True Story Plus	44,818
Endless Vacation	130,441	Real Simple	44,663
In Style	120,991	M	42,339
Men's Health	117,716	Better Homes and Gardens	
Women's Health	115,869	Holiday Food	41,713
In Touch Weekly	111,902	Time	41,710
Martha Stewart Living	110,574	Woman's Day	40,134
O Oprah	109,375	Playboy	37,764
Teen People	107,669	Fortune (Worldwide)	37,095
Sports Illustrated	102,493	Stuff	36,493
YM	99,940	OK! Weekly	34,792
First	94,511	Popular Mechanics	34,766
Seventeen	89,461	Golf Magazine	34,269
Us Weekly	81,117	Runners World	34,185
Vanity Fair	78,829	Teen Vogue	34,016
Economist (North American Edition)	77,046	Fine Cooking	33,450
Taste Of Home	76,781	Marie Claire	33,385
Weight Watchers	76,512	Scientific American	33,102
Star	75,434	Car And Driver	32,844
Maxim	75,360	Elle	32,628
Vogue	73,305	Twist	31,524
Golf Digest	66,459	Globe	31,350
Life & Style Weekly	64,647	Quick And Simple	30,884
YM Special	63,640	Clean Eating	30,761
People Stylewatch	63,574	O At Home	30,121
Glamour	63,451	GQ Gentlemen's Quarterly	30,023
National Enquirer	60,430	Taste Of Home	
Good Housekeeping	60,166	Healthy Cooking	29,152
Cosmo Girl	58,462	Country Living	28,560
Family Circle	58,017	Rotarian	28,326
Everyday Food	55,861	Ladies Home Journal	28,199
Shape	54,065	Elle Girl	27,643
Birds And Blooms	52,142	Motor Trend	27,599
FHM (For Him Magazine)	51,667	Oxygen Women's Fitness	26,741
Popular Science	50,758	Conde Nast Traveler	26,442
Every Day With Rachael Ray	50,398	New Yorker	26,075
Better Homes And Gardens	49,896	Self	25,452
Life	48,059	Bloomberg Businessweek	25,229
Victoria	47,472	Fortune (North America)	25,134
Bon Appetit	46,249	Guideposts	25,029

Source: Abc 2009

HE READS

MEDICAL REPORTS AND

report cards

HE ALSO READS

WEARING

ENS

AND putting greens

MACLEAN'S IS ALWAYS IN HIS WAITING ROOM

3x

HE'S SPENT

HALF HIS LIFE IN FORMAL EDUCATION AND EARNS THREE TIMES THAT OF THE AVERAGE CANADIAN

HE SAVES

LIVES AND OVER

$360,000

HE TAKES

THE BLACK LAB AND THE

BlackBerry

OUT FOR WALKS

ICE TO REACH YOUR CONSUMER, NO MATTER WHO THEY ARE.

ROGERS connect™

Innovate. Inspire. Engage.

Canadian Consumer/Business Magazines: Circulation & Readership: French (measured/reported in PMB 2010 Spring)

French Publications	Magazine Class	Circulation	Readership	RPC	PMB 2010 ALL 12+ Male	Female
7 Jours	Women's	94	916	9.7	337	579
Affaires Plus	Business	86	287	3.3	193	93
Bel Âge Magazine	Mature Market	142	605	4.3	177	428
Châtelaine (Fr)	Women's	204	951	4.7	262	689
Chez-Soi	Home	81	627	7.7	198	430
Clin d'oeil	Women's	74	660	8.9	136	524
Cool!	Youth	*	352	*	116	236
Côté Jardins	Gardening	*	232	*	87	144
Coup de pouce	Women's	225	1229	5.5	344	885
Décormag	Home	90	564	6.3	176	388
Dernière Heure	General Interest	21	349	16.6	142	208
Échos Vedettes	Women's	35	243	6.9	101	142
Elle Québec	Women's	90	764	8.5	153	611
Enfants Québec	Women's	62	255	4.1	57	198
Famous Québec	Entertainment	150	162	1.1	62	100
Femme d'aujourd'hui	Women's	*	208	*	55	153
Fleurs, Plantes et Jardins	Gardening	71	497	7.0	217	280
La Semaine	Women's	59	495	8.4	183	312
L'actualité	News	182	831	4.6	430	400
Le Lundi	Women's	27	437	16.2	160	276
Le Magazine Jobboom	General Interest	82	366	4.5	229	137
Les Affaires	Business	85	256	3.0	170	87
Les Idées de ma maison	Home	71	682	9.6	249	433
Loulou (Fr)	Women's	74	292	3.9	29	263
Madame	Women's	101	262	2.6	34	228
Moi & cie	Women's	43	239	5.6	24	215
Primeurs	TV & Radio	374	330	0.9	159	170
qu'est-ce qui mijote	Food & Beverage	544	1372	2.5	428	944
Rénovation Bricolage	Home	33	512	15.5	321	191
Ricardo	Food & Beverage	*	521	*	149	372
Sélection du Reader's Digest	General Interest	246	1013	4.1	480	534
Sentier Chasse-Pêche	Fishing & Hunting	62	520	8.4	411	109
Star Inc.	Women's	33	384	11.6	159	225
Star Système	Entertainment	34	371	10.9	123	248
Summum	Men's	25	261	10.4	207	54
Touring (Fre & Eng)	General Interest	721	1113	1.5	608	505
Tout Simplement Clodine	Women's	35	324	9.3	46	278
TV 7 Jours/TV Hebdo	TV & Radio	200	651	3.3	271	380
Voir	City & Regional	*	457	*	263	194

1 = Imputed 2 year data - See PMB 2010 Spring Technical Appendix

**Circulation data in accordance with PMB requirements were not received. No readers-per-copy data are shown*

Numbers in 000 except for RPC

General Business Publications

Based on Canadian Advertising Rates & Data (CARD), business publications represent the second largest publication category, in total number of titles, behind consumer magazines. There are 779 business publication titles in 90 different categories, which include topics such as advertising and marketing, education, insurance and management.
PMB measures the readership of two segments of the business audience – select Professional/Business Managers, and Managers/Owners/Professionals/Executives (MOPEs). PMB also measures readership of those involved in business purchase decisions. When considering the business audience, many of the available consumer publications also index highly for the above mentioned targets. The chart below illustrates a selection of both general business and consumer publications and their respective average issue readership indices against PMB-defined 'Business' Targets.

Canadian Consumer/Business Magazines: English not reported in PMB 2010 (over 50,000 audited circulation)

English Publications	Circulation (000)
Baby and Child Care Encyclopaedia	94
Baby Stages–Tiny Tots	240
Baby Stages	239
Carguide	82
ChickaDEE	99
Chirp	79
Entertainment	408
Exclaim!	105
The Georgia Straight	119
Legion Magazine	259
Maxim	75
More	138
Owl	83
Parents Canada – Expecting	140
Pop!	329
ScoreGolf	139
Today's Bride	98
Today's Parent–Baby & Toddler	131
Today's Parent–Newborn	110
Today's Parent–Pregnancy	128
United Church Observer	57
The Walrus	53
Whoa!	327

Canadian Consumer/Business Magazines: French not reported in PMB 2010 (over 50,000 audited circulation)

English Publications	Circulation (000)
Branché	224
Plaisirs de Vivre	68
Protégez-Vous	108
Sept Jours	78

Consumer Publication Index on Business Targets

Adults 18+ Index (Total Canada)				
Publication	Circulation (000s)	MOPEs	Selected Prof./Business Managers	Business Purchase Involvement
English				
CAA Magazine	1,601.5	127	150	110
Canadian Business	80.5	185	301	165
Canadian Home Workshop	97.1	123	153	132
Cottage Life	71.8	137	179	140
EnRoute	135.7	215	344	175
Eye Weekly	124.7	244	171	129
Financial Post Magazine	168.6	221	316	165
Food & Drink	496.8	148	180	140
Golf Canada	136.8	140	224	155
Macleans	362.8	127	153	118
MoneySense	101.2	184	233	143
National Post (M-F)	152.2	218	260	160
National Post (Sat)	161.2	175	245	132
Now	105.5	174	161	127
Profit	88	232	299	197
Report On Business Magazine	256.4	215	325	168
The Globe & Mail (M-F)	306	201	258	145
The Globe & Mail (Sat)	380.6	204	249	136
Toronto Life	86	187	253	155
Western Living	162.3	158	171	153
French				
Affaires Plus	77.8	177	287	199
Commerce	NA	198	352	194
L'actualité	170.1	119	153	126
Le Devoir (M-F)	28.8	178	247	131
Le Devoir (Sat)	48	173	212	127
Les Affaires	80.5	224	288	192
Touring (French & English)	730.8	126	145	126
Voir	87.2	133	144	124

Source: PMB 2009 Fall Readership and Product (2yr)
Circulation Source: CARD Spring/Summer 2010

MEDICAL JOURNALS

There are 79 medical publications listed in CARD. Medical publications include those focused on general medicine/family practice, as well as specialty topics such as cardiology.

Thirty-one of these are either members of the Canadian Circulations Audit Boards (CCAB), Canadian Association of Medical Publishers MMS, or the PMB-administered study of medical press readership.

Medical Publications

Magazine	Circulation (000s)
English	
Canadian Family Physician	34.9
Canadian Journal of CME	36.7
Canadian Journal of Diagnosis	36.5
L'actualité Medicale	16.5
Le Medecin du Quebec	18.3
The Medical Post	47.5

Source: CARD Spring/Summer 2010

ADVERTISING & MARKETING PRESS

A further example of the range of business publications reported in CARD is its "Advertising & Marketing" section. The chart below shows a handful of the 11 publications available to reach advertising and marketing professionals.

Advertising & Marketing Publications

Magazine	Circulation (000s)
English	
CARD	0.9
Contact	NA
Direct Marketing	NA
Marketing	7.2
Strategy	11

Source: CARD Spring/Summer 2010

FARM PUBLICATIONS

CARD also devotes a separate section to Farm publications. Of the 94 titles published in Canada, there are 70 English and 18 French titles, with an additional 6 published in both French and English. Leading titles include *Alberta Farmer Express*, *Better Farming*, *Cattlemen*, *Grainews*, *La Terre De Chez Nous* and *Western Producer*. The majority of Farm magazines have a regional focus in addition to being targeted to crop or livestock farmers, whereas the Farm newsprint publications have more general agriculture news and information.

Magazine Data Sources

PRINT MEASUREMENT BUREAU (PMB)

77 Bloor St. W., Suite 1101
Toronto, ON M5S 1M2
Phone: (416) 961-3205/
1-800-PMB-0899
Fax: (416) 961-5052
pmb.ca

PMB is an industry organization with over 560 members, including publishers, advertising agencies, advertisers and other related companies in the Canadian media industry. The major data component of the annual PMB study is the detailed readership data for over 125 Canadian consumer magazines and newspapers and the linkage of the data with information on readers' product usage patterns, their usage of brands, retail shopping habits and general lifestyles. The study also provides general usage data on other media such as television, radio, daily newspapers, outdoor, transit and the Internet. Generic (quintile) data on all media can be used for cross-media evaluation exercises. PMB is now released biannually.

PMB MEDICAL MEDIA STUDY (MMS)

77 Bloor St. W., Suite 1101
Toronto, ON M5S 1M2
Phone: (416) 961-3205/
1-800-PMB-0899
Fax: (416) 961-5052
E-mail: tosha@pmb.ca
pmb.ca

The MMS is the principal source of readership data for publications directed to the medical profession. The study is released once a year (July) and measures the reading habits of the following physician/specialist groups: general practice/family medicine, surgery, internal medicine, psychiatry, obstetrics/gynaecology and cardiology. The study also provides additional market information on physicians/specialists: type of practice, number of prescriptions written per day, policy on seeing sales reps, use of technology and number of patients per day.

PMB PHARMACIST STUDY

77 Bloor St. W., Suite 1101
Toronto, ON M5S 1M2
Phone: (416) 961-3205/
1-800-PMB-0899
Fax: (416) 961-5052
E-mail: tosha@pmb.ca
pmb.ca

The PMB study examining media consumption among pharmacists uses a mail questionnaire sent to a sample of retail and hospital pharmacists to establish readership patterns for nine publications. The last release was January 2008, based on a two-year rolling sample of 1,400 pharmacists.

MAGAZINES CANADA

425 Adelaide St. W., Suite 700
Toronto, ON M5V 3C1
Phone: (416) 596-5382
Email: adinfo@magazinescanada.ca
magazinescanada.com

Magazines Canada is a not-for-profit organization whose primary purpose is to provide marketing, education, research and technical support for the Canadian consumer magazine industry. Magazines Canada represents over 300 magazines totaling 90% of Canadian magazine paid circulation. Services to advertising agencies and their clients include:

RESEARCH LIBRARY Free access to magazine research from around the world.

PAGE NEWSLETTER A monthly newsletter about magazine research and news.

MAGBLAST PODCAST A monthly blast of topical magazine information.

MAGWORKS CREATIVE TESTING A new, cost-effective way to test magazine ad creative performance.

WEBSITE Summarizes industry trends and research information most requested by media planners and advertisers to
assist them in gaining instant access to relevant magazine info.

AUDIT BUREAU OF CIRCULATIONS (ABC)

151 Bloor St. W., Suite 850
Toronto, ON M5S 1S4
Phone: (416) 962-5840
Fax: (416) 962-5844
Email:
Accessabc.com

ABC is a non-profit, tripartite association of advertisers, advertising agencies and publishers. The purpose of ABC is to set standards by which circulation and other data of member newspaper and magazine publishers may be audited; verify facts and figures through field auditors' examinations of all pertinent records; and report these facts and figures through regularly published, standardized reports. Magazine reports include:

PAID AND CONTROLLED CIRCULATION AUDIT REPORTS Annual report.

MULTIMEDIA PUBLISHER'S STATEMENTS Incorporates website traffic activity data in Paragraph 1 of a magazine's circulation statements, allowing magazines to present a broader view of their reach and total audience to buyers who advertise on multiple platforms within the same brand.

CONSOLIDATED MEDIA REPORT Compiles circulation from Publisher's Statements and website traffic data, along with any other auditable media, into one aggregated figure providing advertisers with a capsule summary of a publication's overall brand.

MAGAZINE TREND REPORT Annual report providing circulation and ad trends for five years for all Canadian and U.S. magazine members.

CANADIAN CIRCULATION OF U.S. MAGAZINES Annual Report.

A MESSAGE FROM

OMAC
Out-of-Home Marketing Association of Canada

OUT-OF-HOME MEDIA: CONSUMER CONNECTION 24/7

With consumers spending more than 50 percent of their time outside the home, Out-of-Home media is the most effective way to reach, engage and influence today's mobile and active consumer.

Providing 24/7 visibility, 365 days per year, Out-of-Home media delivers the opportunity to influence purchase within minutes of the buying decision due to strategic placement of OOH advertising on the path to purchase. It intercepts consumers at many points throughout their day: on the way to work, at lunch, on a break and on the weekend. It cannot be time-shifted, turned over or clicked off.

Whether building mass reach fast or targeting specific market segments like air travelers, shoppers or college students, OOH offers a broad range of opportunities to create memorable connections with consumers and deliver measurable results. Advancements in technology are fostering new digital formats and networks, inspiring cross channel interactive programs that tap mobile marketing, generate real-time results and drive to the web.

If you're looking for additional proof that Out-of-Home media can help you build market share and strengthen brand loyalty, visit OMAC's website at www.omaccanada.ca. There you'll find over 350 case studies demonstrating the power of our medium, creative guidelines for effective OOH communications, over 1,200 creative examples, research and a list of our member companies and their products.

Out-of-Home & Transit

Out-of-Home

Distribution

Total inventory of measured traditional outdoor (faces)	43,954
Total inventory of measured non-traditional outdoor (faces)	37,112

Consumption (A18+)

1 week reach	92%
Kilometres driven average per week	135
A18-24 hours/week on transit (transit users)	4.7%

Sources: COMB Market Data Report April 2010, BBM RTS Spring 2010

GENERAL INFORMATION

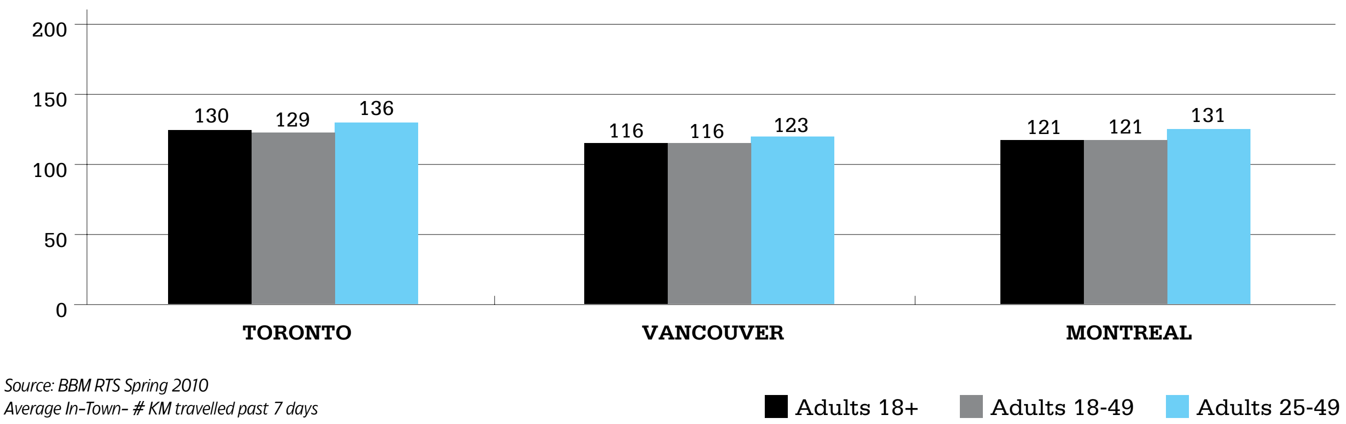
Out-of-home is seen as both the oldest form of advertising as well as one of the fastest growing and diversifying forms. Traditional outdoor has been available long before advertising was seen as an industry–pictures painted on rocks illustrated which hunting grounds had worked. In Canada, out-of-home is generally categorized into two groups: traditional and non-traditional. The first group includes types that have been available for a longer time–posters, backlit posters, transit shelters, street level, mall posters, superboards, permanents, bulletins and murals. Non-traditional is everything else.

Non-traditional out-of-home has been growing exponentially over the past few years, as more and more operators identify new places to place advertising–elevators, bathrooms, change rooms, waiting rooms, hubcaps, golf carts, parking lots, truck sides, rickshaws and even the sky–and technology to deliver the message.

Of course, the line between traditional and non-traditional is blurring. How do you categorize a digital poster? There was a time when measurement could be seen as how to define a product–COMB (Canadian Outdoor Measurement Bureau) measured traditional out-of-home and everything else was non-traditional. Of course, COMB measures advertising, both static and moving, for some advertising in change rooms and on our streets; and does not measure some of the most traditional advertising like murals (from some suppliers). It may be time to change our look at out-of-home from traditional/non-traditional to industry measured/not industry measured.

On the industry measured side, COMB audits traditional out-of-home media, as well as

WEEKLY AVERAGE IN-TOWN KILOMETRES TRAVELLED PER CAPITA



Source: BBM RTS Spring 2010
Average In-Town- # KM travelled past 7 days

OUT-OF-HOME DISTRIBUTION

Top 20 Markets By Population	Airport	Backlight	Electronic Message	Indoor	Mall	Murals	Parking Lot	Posters	Street Level	Superboard
Calgary	P	CBS, P	CA, NE, OBN, ZO	NE, ZO	CC, NT, P	P, RCC	AB	CBS, P, RCC	AM, CBS, P	P
Edmonton	I, P	CBS, P	CA, NE, OBN, ZO	NE, ZO	CC, NT, P	–	AB	CBS, P	AM, CBS, P	P, PRO
Greater Sudbury	–	–	–	–	CC	–	–	OP, P	BK	–
Halifax	I, P	–	–	NE	NT, P	–	AB	CBS, P	AM, CBS	CBS, P
Hamilton	–	P	OBN	NE, ZO	CC, P	–	AB	AO, CBS, P	AM, CBS, P	CBS, P
Kitchener	–	–	OBN	NE, ZO	CC, NT, P	–	–	CBS, P	P	–
London	–	–	–	NE, ZO	CC, NT, P	P	AB	CBS, P	CBS, P	P, RCC
Montréal	AO, CC	AO, CBS, P	AO, CA, NE, ONE, P, ZO	NE, ZO	CC, NT, P	AO	AB	AO, CBS, P	AM, AO, CBS, P	AO, CBS, CC, P
Oshawa	–	–	–	NE, ZO	CC, NT, P	–	AB	AO, CBS, P	AM	–
Ottawa-Gatineau	I, P	P	ZO	NE, ZO	NT, P	–	AB	AO, CBS, P	AM, P	AO
Québec	AO	CBS	ZO	ZO	NT, P	–	AB	AO, CBS, P	CBS, P	AO, CBS, P
Regina	I	–	–	NE	CC	–	AB	CBS, P	AM, P	CBS, P
Saguenay (Que.)	–	–	–	NE, ZO	–	–		CBS	AO, CBS	–
Saskatoon	I, P	P	P	NE	CC, NT, P	–	AB	CBS, P	AM, P	CBS, P
Sherbrooke (Que.)	–	–	–	ZO	NT	–	–	AO, CBS.P	AO, CBS	CBS
St. Catharines (Ont.)	–	P	OBN	NE, ZO	NT, P	–	–	CBS, P	AM, P	P
Toronto	CC	AO, CBS, P, RCC	AO, CA, NE, OBN, ONE, P, ZO	NE, ZO	NT, P	AO, CBS, P, RCC	AB, IMA, PV	AO, CBS, P, RCC	AM, AO, CBS, P	AO, CBS, CC, PRCC, P, RCC
Vancouver	CC	CBS, P	AO, CA, NE, OBN, ZO	NE, ZO	CC, NT, P	–	AB	CBS, P	AM, CBS, P	P
Windsor	–	–	OBN	NE	NT, P	–	AB	CBS, P	CBS	CBS
Winnipeg	I	–	OBN	NE	CC, NT, P	–	AB	CBS, P	AM, CBS, P	CBS, P

Source: COMB Market Data Report Apr 2010, Cardonline & Coda

LEGEND

AB	Abcon Media	**FW**	FarWest	**MC**	MediaCity	**PL**	Paris Lites
AM	Adapt Media	**FF**	Fashion Frame	**MTC**	Metro Toronto Convention Centre	**P**	Pattison
AO	Astral Outdoor	**GG**	Gallop	**MA**	Metromedia	**PX**	Penex
BK	BK Corporate Marketing	**GR**	Grassroots Media	**NT**	neoTraffic	**PR**	Prime
BV	Bayview Village	**HR**	Holt Renfrew	**NE**	NewAd	**RCC**	RCC
CA	Captivate	**IMA**	IMA	**OBN**	Outdoor Broadcast Network	**S**	Skywalk
CBS	CBS Outdoor	**I**	Interspace	**ONE**	Onestop Network	**S**	Strategic Media
CX	Cineplex	**MM**	Mango Moose	**OP**	Outdoor Exposure	**SS**	SuperSign
CC	Clear Channel	**MX**	Maxximum	**PRO**	Pro-Lite Outdoor Adv.	**T**	Titan
CO	Creative Outdoor	**MH**	Media House	**PV**	Padvertising	**Y**	Yonge 401
DC	Doublecluth	**ME**	Media Merchants			**ZO**	Zoom Media
EC	ecoMedia	**M1**	Media One				

some digital and indoor posters. COMB is a tripartite organization that supplies audited circulation for the outdoor industry. GRPs are calculated using this circulation (measured in vehicular traffic for outdoor, and pedestrian traffic for indoor) generated only by those people living in the market. COMB publishes its Market Data Report twice a year. Gross (total) and in-market circulation data are reported by type, operator and market. These reports also include detailed information on the techniques used for traffic counting.

The remainder of out-of-home advertising does not have an industry body that acts as a circulation auditor. They tend to have proprietary studies that are undertaken on their behalf. These studies do not use a specific standard approach to audience measurement, and are not necessarily comparable to the circulation data available from COMB.

Outdoor suppliers will generally provide an affidavit at the end of a campaign that shows the delivery of the campaign compared to what was purchased. In the case of measured out-of-home, COMB has standardized the reporting for the media that it audits and will (for a fee) provide advertisers with a third-party, proof-of-performance report.

Outdoor space is sold by market, either on the basis of a package that delivers weekly or daily GRPs or by specific location(s).

Legislation governing out-of-home is determined on a market by market basis which has resulted in inconsistent availability of specific products across markets. In April 2010, the city of Toronto introduced a sign by-law to harmonize a number of laws from the pre-amalgamated municipalities. The by-law includes a "tax" that must be paid by the operators for the sites they lease. The scale of proposed taxes run from $1,000 a year to $24,000, depending on the size and type of sign, and would generate about $10.4-million a year for the city.

Out-of-home reach and frequency are determined using circulation counts and potential exposure data from a syndicated database. In the case of measured media, COMB has industry-approved approach and software, COMBNavigator, which uses audited circulation and exposure data from BBM RTS to estimate reach and frequency for a number of demographic groups.

The out-of-home advertising industry is promoted and represented by OMAC (Out-of-Home Marketing Association of Canada). OMAC serves as a central resource for information on out-of-home advertising including products, networks, creative and research.

DEFINITIONS

HORIZONTAL POSTERS Horizontal posters are large (10 x 20 feet), illuminated from the front, paper-covered boards that are available in most markets. Posters are printed on multiple sheets of paper that are glued to the unit face.

VERTICAL POSTERS Similar to horizontal posters, vertical posters are 12 feet wide x 16 feet high. They are primarily available in major urban centres.

TRIVISIONS/TRIOS Horizontal or vertical posters that have rotating blades that allow three advertising faces to be shown on the same structure. These blades rotate at a set speed allowing each side to be shown for a set period of time.

BACKLIT OUTDOOR Backlit units are, as their name suggests, lit from behind. The standard size is 10 x 20 feet. Backlits are printed on a single sheet of vinyl attached at the edges to the unit.

STREET LEVEL OUTDOOR These rear-illuminated units consist of two- or four-sided advertising faces. Street level advertising includes transit shelters and blocks or columns with advertising faces. The standard size is 4 feet wide x 6 feet high. They are primarily available in urban centres.

ELECTRONIC MESSAGE This signage comes in varying video and digital formats ranging from still to full motion. The units usually display ads on a rotational basis (typically 10 to 15 seconds in length). The size of the units can vary from small to large. Most units are available only in major urban centres.

INDOOR POSTERS Indoor posters come in a few different sizes and are made of paper. They can also be backlit or be digital. This format can be targeted to specific environments (e.g. resto/bar, movie theatre, fitness facility, stadium, etc.).

MALL POSTERS Mall posters are rear-illuminated, available in major shopping centres across Canada. Audience calculations are based on pedestrian traffic passing the advertising face.

PERMANENTS/BULLETINS These are large-format advertising displays. Each location is oversized and unique in dimension. Materials vary from paint to vinyl, and the locations can be customized to suit the advertiser's specifications. Because of their size, unique shape and/or degree of impact, these units are typically located in high-traffic areas.

SUPERBOARDS AND SPECTACULARS These large display units may be expanded from a rectangular format to include space extensions, flashing neon lights, laser beams, electronic messaging, etc. They can be tailored to an advertiser's specifications. They are typically located in high traffic areas. There are two standard sizes, Series 10 (10 feet x 40 feet) and Series 14 (14 feet x 48 feet).

MURALS These are typically large-format displays on sides of buildings in downtown cores. Each location is unique and may utilize all or part of a wall–customization is common. They typically are printed on vinyl, but may be hand-painted.

AIRPORT Airport advertising encompasses all advertising found in airport terminals (indoor) and on the airport grounds (outdoor). Most indoor units are backlit, but can also be kiosks, pillar wraps and displays. Outdoor units are typically large format backlights and superboards.

ELEVATOR This category entails both the small digital screens in the upper portion of elevators as well as the paper posters that are mounted on the walls of the elevator. There are no standard sizes for these units. Typically digital screens sell advertising based on a portion of the screen carrying ads, while the remainder shows news content.

PARKING LOT An all-encompassing category that includes all advertising found in parking lots – boom-arm, flat posters, pillar wraps. There are no standard sizes, however individual suppliers do have their own specifications.

MOBILE This includes all advertising that is not in a specific location. It entails everything from people walking with sandwich boards to 16-wheelers on the highway.

Out-of-Home Data Sources

OUT-OF-HOME MARKETING ASSOCIATION OF CANADA

24 Duncan St., 2nd Floor
Toronto, ON M5V 2B8
Phone: (416) 968-3435
Fax: (416) 968-6538
E-mail: rcaron@omaccanada.ca/
rcaron@amcacanada.ca
omaccanada.ca/amcacanada.ca

The main goal of OMAC is to provide advertisers, agencies and media management companies with relevant industry information and research to plan and buy out-of-home advertising.

CANADIAN OUT-OF-HOME DIGITAL ASSOCIATION

300-266 King St. W.
Toronto, ON M5V 1H8
Fax: (416) 646-2722
www.oohdigital.ca

CODA's mission is to provide the out-of-home industry with leadership and establish best practices for association members to improve the effectiveness of the industry as a whole.

CANADIAN OUT-OF-HOME MEASUREMENT BUREAU

24 Duncan St., 2nd Floor
Toronto, ON M5V 2B8
Phone: (416) 968-3823
Fax: (416) 968-9396
E-mail: hthompson@comb.org
comb.org

The Canadian Out-of-Home Measurement Bureau (COMB) is a media measurement organization that fulfills two services on behalf of the out-of-home industry: measurement and auditing. COMB is charged with the verification of circulation for the benefit of the industry and its users. COMB is a national, non-profit organization independently operated by representatives from agencies, advertisers and the Canadian out-of-home advertising industry.

Transit

GENERAL INFORMATION

Transit advertising covers all advertising found in and on transit vehicles in Canada. The category runs the gamut from taxi headrests to subway stations/platforms to interior cards to wrapped commuter trains. Unlike traditional out-of-home, there is no industry body that audits circulations and develops reach/frequency models for transit.

In a broad sense there are two areas of transit advertising – interior and exterior. As their names would suggest; interior is all advertising that is inside a transit location – bus, subway car, subway platform, commuter train – and exterior is anything on the outside of vehicles. Exposure models for the two types are very different.

Interior transit circulations are generally determined by passenger counts provided by the transit authority. These counts tend to be system-wide, rather than specific to a particular route, line or station. Using these counts and a factor of likelihood of exposure, a model has been developed to determine GRPs. Space is generally sold on a GRP basis or by showing (percentage of transit vehicles in which the advertising unit appears). However, specific sites, stations and cars can also be purchased.

Exterior transit is also sold on a GRP basis using estimated impressions. These are calculated using a model that incorporates, among other variables, traffic counts and distance travelled by the vehicle.
Transit has a number of different formats available that have, for the most part, been standardized across the country.

EXTERIOR

SEVENTY POSTERS are 21" x 70" in aluminum frames permanently attached to the sides and the rears of buses. These are the most widely available units.

KING POSTERS are 30" x 139" in aluminum frames permanently attached to the sides of buses. There are some variations of this format available in select markets.

FULL WRAPS/BUS MURALS/BUS BACKS are vinyl coverings of all or part of transit buses. The vinyl covering can be applied to all sides of the vehicle with the exception of the front. The minimum campaign length varies by market, with smaller markets requiring a larger commitment. Full Wraps, as the name suggests, cover both sides and back of the vehicle; Bus Backs are only the back of the vehicle; and bus murals cover only on the driver's side. In some cases, interior cards are included in the purchase.

INTERIOR

TRANSIT POSTERS are a horizontal format found inside transit vehicles above the windows. These are widely available with the exception of Montreal subway cars. Cards come in two sizes–Standard, which are 35" x 11"; and Super, which are 70" x 11".

DOOR CARDS/VERTICAL POSTERS are a vertical format usually found beside the doors of cars. They are available on both subway and commuter trains. A standard 20" x 28" size unit can also be found on station walls in some markets.

Advertisers have flexibility in creative approach utilizing interior formats. Any combination of units, including all units within a vehicle, can be purchased by one advertiser. In addition, take-away items like coupons or take-one pads can be added to the units.

STATION POSTERS are located on platform waiting areas and in high-traffic areas of transit and commuter stations. They come in various sizes, with the most common being 47¼ " x 68¼ ". Larger format backlits and murals are also available at selected stations.

DIGITAL CONTENT on LCD is available on both the Toronto and Montreal subway systems. Both television and flash animation creative can be used. Messaging can be delivered in real time, or sponsorship of relevant content can be purchased to increase relevance to viewers.

STATION DOMINATION is available in the subway/LRT systems of Toronto, Montreal and Vancouver. One advertiser purchases 100% of all available station inventory and can include murals, turnstiles, stairs and floors where advertising is generally not available.

TAXI MEDIA are also available with varying formats. Both interior and exterior formats are available on taxis in some markets. These run the gamut from cards on the back of headrests to full vinyl wraps.

Other available locations for transit advertising include schoolbus seatbacks and airplane trays.

TRANSIT MEDIA SUPPLIERS IN TOP 10 MARKETS

Market	Transit Supplier	Light Rail/Subway Supplier
Toronto	CBS,IMA, Streetseen	CBS, Exclusive, OneStop
Vancouver	Lamar	Lamar
London	Lamar	-
Montreal	Métromédia, Pattison	Métromédia, Alstom, OneStop
Quebec City	Métromédia	-
Ottawa	Pattison	-
Calgary	Pattison	Pattison
Edmonton	Pattison	Pattison
Winnipeg	Pattison	-
Hamilton	Streetseen	-

Source: CARDonline

TRANSIT USER BREAKDOWN

Average minutes spent commuting by Transit (one-way)

	Adults 18 +	Adults 18 - 24	Adults 25 - 49
Toronto	35	29	36
Vancouver	30	26	31
Montreal	36	32	35

Source: BBM-RTS Major Market–Spring 2010 Study

A MESSAGE FROM

iab.canada

SUMMARIZING 2009, PLUS 5 TRENDS TO WATCH IN 2010

INTERNET USE GROWS AT A DOUBLE-DIGIT RATE
And May Have Surpassed TV Viewing In 2009
According to IAB Canada's annual survey of the most recent data from PMB, NADbank and BBM RTS, the Internet returned to double-digit growth in 2008. Based on the 2008 studies, the Internet was already #1 in terms of time spent for 18-34 year olds, and was within one point of Radio's second place share. However, according to Ipsos' Inter@ctive Reid Report (fielded in Q4 2009), the Internet has since leaped over both Radio and TV, with the number of weekly hours spent Online by all Canadians (18.1 hours) found to be higher than the 16.9 hours spent watching TV.

EMERGING PLATFORMS ARE EMERGING NO MORE…
Mobile Is Mass + Multi-Functional
With Mobile penetration at 65% in Canada, can we still call the Mobile platform emerging? From old favourites such as SMS to new ones such as Mobile Apps, Ads, Video, Social, Search, Location-Based Services, Augmented Reality and even M-Commerce – there are a multitude of marketing tactics and results that can be delivered across Mobile devices.

It's Game On! With Videogaming
Would it surprise you to learn that the earnings of Guitar Hero III surpassed that of Titanic? Videogaming is not just for geeks anymore... In their research, Kia found that Gamers were 33% more likely than non-Gamers to purchase a new car every 3 years; and that when Kia advertised both "around" and "in" games on Microsoft's Xbox, they were able to lift purchase consideration by a full 96%.

Digital Out Of Home Invites Interaction
Digital signage is everywhere: on the walls of our malls, in our transit systems, schools, hotels, offices and even in our personal residences. And although that adds up to a lot of opportunities to be seen, Advertisers who visualize only TV-like push marketing programs for these screens are missing out on the myriad ways in which Online, Social Media and Mobile technologies and content can be integrated into DOOH to pull consumers into intense brand engagement experiences. Digital signage can "react" with advertiser messages based on a user's location, gender, touch (Coca Cola) and eye movement (Amnesty International); and can even place the user within the message itself (Atlantic Lottery Corp., Sun-Rype).

Attribution Is Everything
Measurement and metrics are a marketer's best friends, except when errors in how we attribute success occurs… According to Atlas, attributing marketing success to the "last Interactive ad seen" overlooks between 93-95% of the interactions that actually drive results. Atlas' engagement mapping shows that it's a long road to conversion. Publishers higher in the Interactive marketing funnel (who deliver ad exposures up to 90 days prior to conversion), are valuable sources of new prospects that feed traffic to lower-funnel channels– yet over 75% of advertisers' "primary actions" consider a window of only fourteen days or less as important. Clearly, it's time to open up the conversion window and let upper-funnel sites in.

Customized Creative
New technologies allow advertisers to create thousands of iterations of a single Display ad at a low cost and with a fast time-to-market. Consumer insights from the custom ads abound, and in the case of Yahoo!'s Smart Ads solution, increased HP's return on ad spend (ROAS) to 20.5 times that of previous Display ad campaigns, placing this top-of-funnel program on par with Search.

Transitioning Content To A Real Time, Touch-Based Computing World
With analytic dashboards now available to monitor the "day of" and ongoing success of marketing programs on a minute-by-minute basis; the largest Search Engines now integrating real-time results from Social Media updates; and the launch of touch-based smart phones and the iPad changing the game yet again, there are new opportunities and hurdles for Advertisers to face in transitioning assets to take advantage of these new trends. The time to create your action plan is now!

Transparency, Education, Choice + Accountability: The Key To Maintaining Consumer Confidence In Targeted Advertising
The promise of interest-based, location-based, customized or data-driven advertising is that instead of experiencing ads as interruptions, consumers will experience them as services, based on the heightened relevance that targeting provides. To make sure this remains true, marketers will need to let consumers know when they're being targeted; help them learn more about the targeting procedures being used; allow them to opt-out of targeting altogether; and maintain that preference for as long as the user determines it is needed.

FOR MORE INFORMATION
on Interactive advertising contact:
Paula Gignac
President, IAB Canada
iabcanada.com
416-598-3400 (ext. 26)

Internet & Mobile Media

MOBILE MEDIA STATS

Wireless phones are among the fastest growing consumer products in history.

At the end of December 2009, Canadian wireless phone subscribers numbered 22.8 million.

75% of Canadian households have access to a wireless phone.

Canadians send 122 million text messages per day.

Each year, Canadians place more than 6 million calls to 9-1-1 or emergency numbers from their mobile phones.

Half of all phone connections in Canada are now wireless.

THE INTERNET IN CANADA

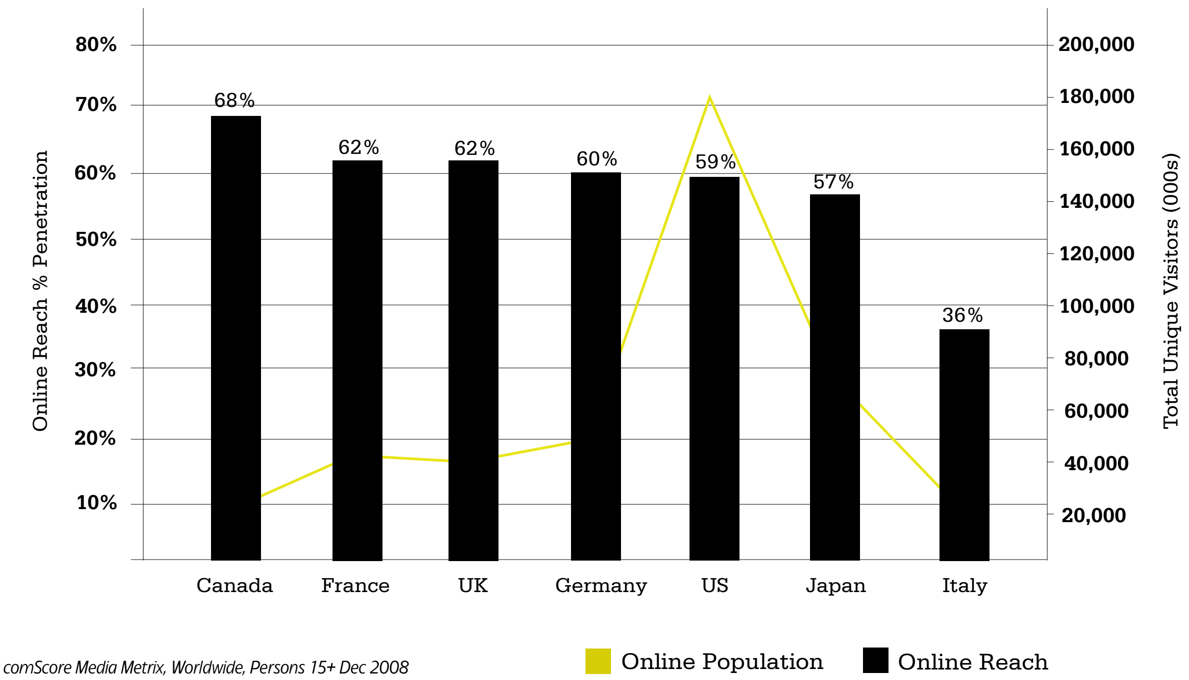
Canadians of all ages and regions have embraced the Internet and it has become a larger part of their regular media mix. On average, Canadians are spending more time online than the rest of the world's population and, as tracked by IAB Canada, the time spent with the medium continues to grow substantially. Canada's high household Internet penetration, combined with its extremely high broadband penetration also means that we are among the world's heaviest consumers of Conversational Media (blogs and social networks like Facebook) as well as online video content, according to comScore. More Canadians are spending more time, viewing more video and social media content than their international counterparts on a per capita basis. Canadians are far more likely to enjoy an "always on," high-speed, multimedia experience and this adds to their increased usage.

ONLINE ADVERTISING IN CANADA

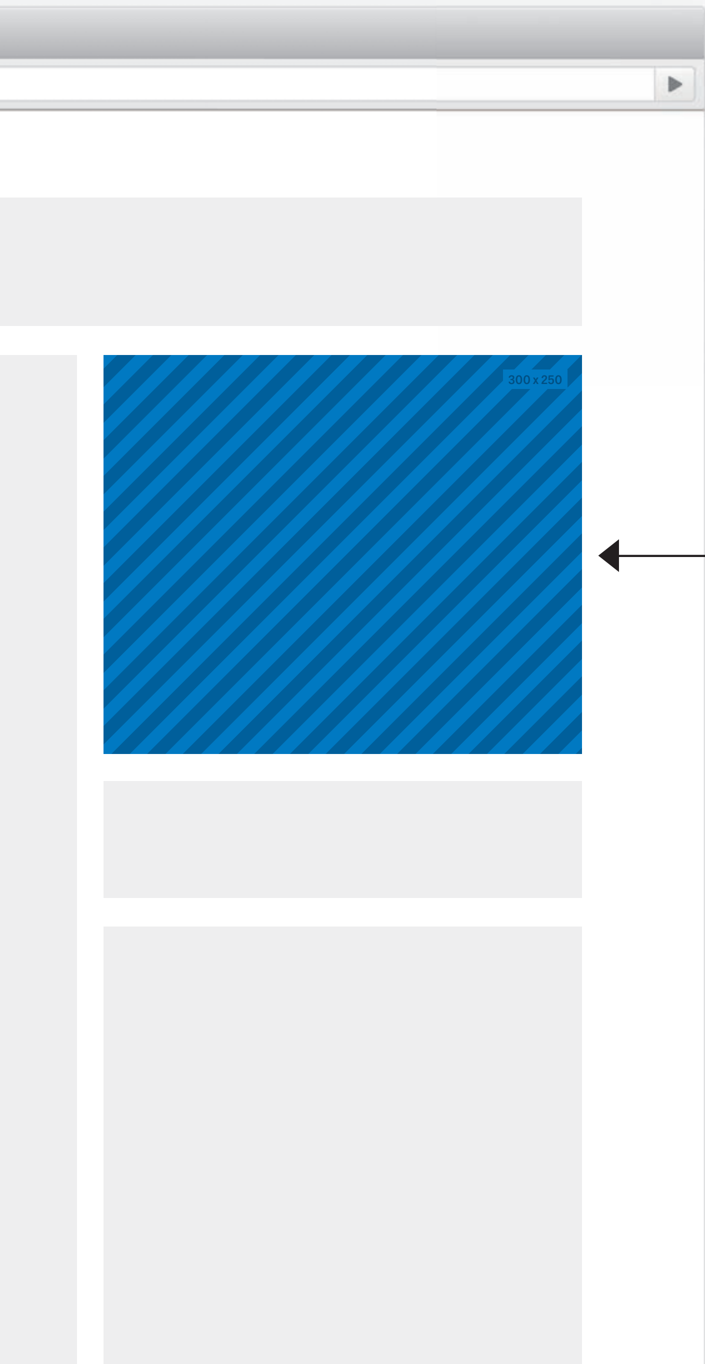
ADVERTISING NETWORKS

Advertising Networks aggregate online inventory from a number of different publishers to create significant reach and ad delivery against a specific audience. The number of publishers used could range from one to many thousands. Networks gather the inventory either through

INTERNATIONAL INTERNET REACH



Source: comScore Media Metrix, Worldwide, Persons 15+ Dec 2008



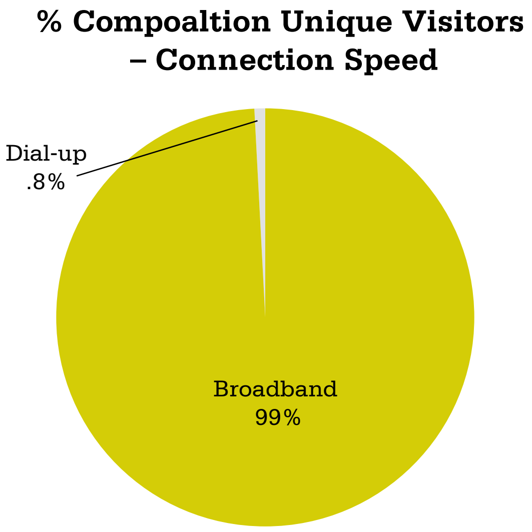
Things we're geeking out on:

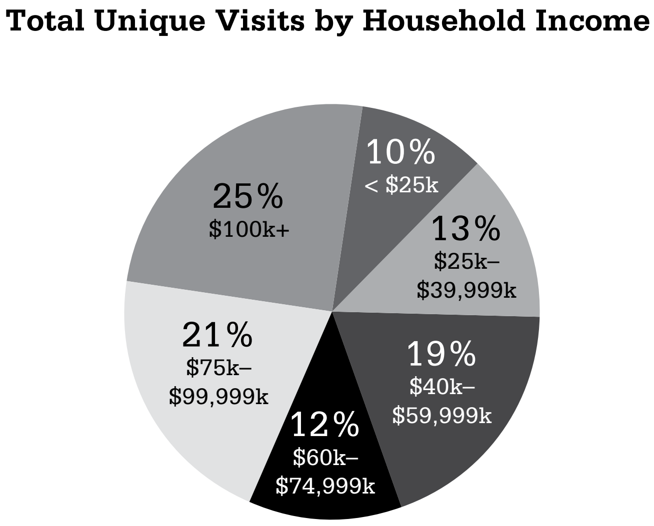
Search.
Maps.
Translation.

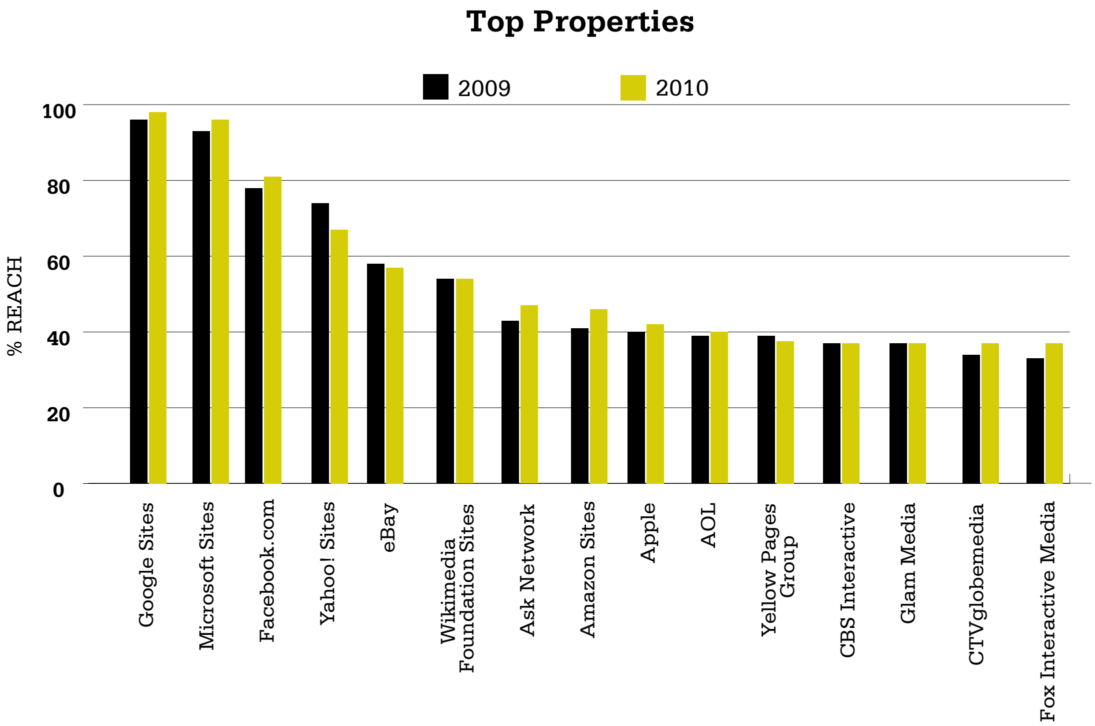
And banner ads.

WATCH THIS SPACE.

google.com/watchthisspace







Source: comScore Media Metrix, (Canada), Persons 2+, Dec 2007 – Dec 2008

direct relationships with the publisher or via an online ad exchange. Some publishers may grant a network the exclusive rights to represent some or all of their website's inventory. Other publishers offer their inventory to multiple networks via multiple relationships or through an ad exchange. While almost all online ad networks offer inventory that conforms to IAB Canada's standardized ad formats, some may offer alternative sizes, as well as more premium, integrated inventory like page takeovers, site skins or sponsorships.

Most networks offer advertisers a number of different purchasing options (Cost-Per-Thousand, Cost-Per-Click, Cost-Per-Acquisition, flat rate for sponsorships/packages/takeovers). Many offer options for targeting including by demography, by geography, IP, content, based targeting, sub-channels, interest-based targeting and site re-targeting. While many provide broad reach, certain specialty networks, for example The Travel Ad Network or NetShelter, target a specific category or niche audience.

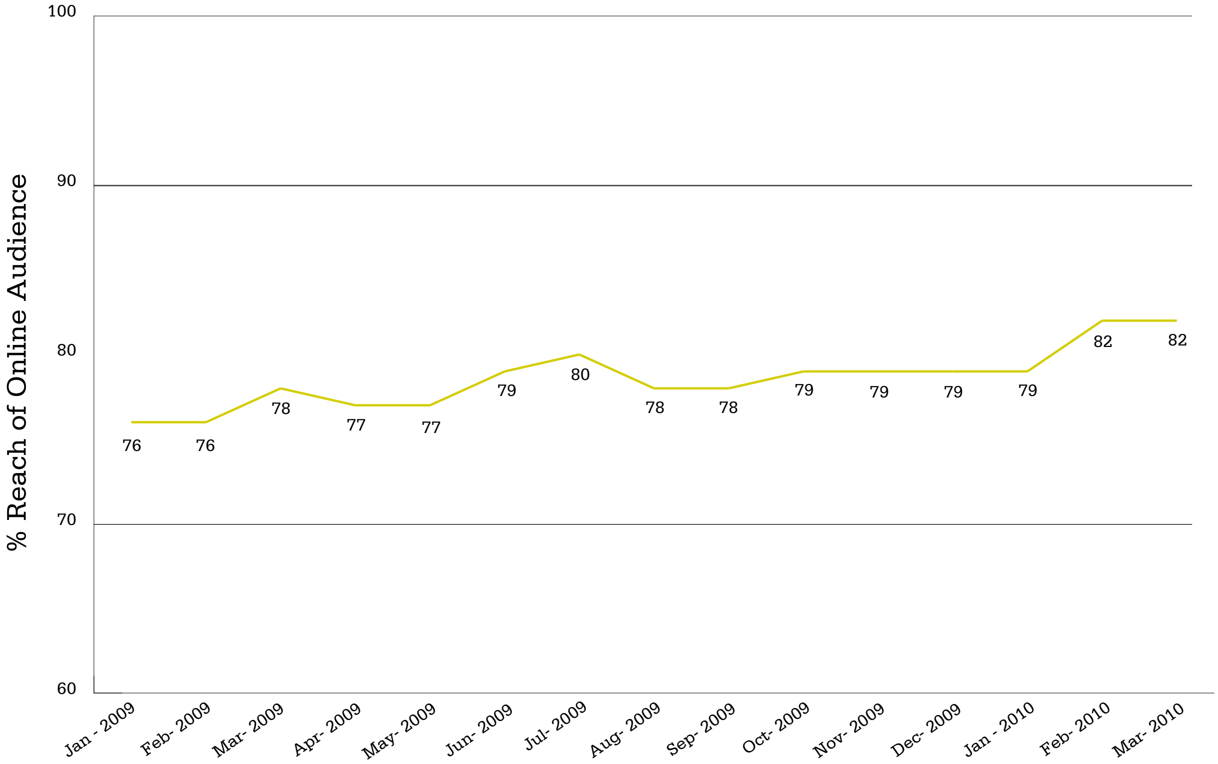
EMAIL MARKETING

Targeting opt-in subscribers of the publisher's mailing list, email marketing can provide a great relationship building opportunity to a highly targeted and loyal audience who has volunteered to receive this information. Subscription base can be further targeted by gender, geography, age, interest, etc. Placements, generally, take the form of display or text ads on newsletter, sponsored email blast as sole advertiser of the insertion, or content integration. Traffic generated through the placements can, in most cases, be tracked via third party ad server.

IAB CANADA STANDARD AD UNITS (CANADIAN UNIVERSAL AD PACKAGE OR CUAP)

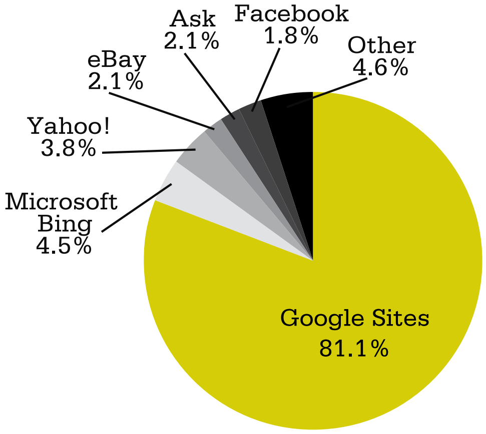
These are ad units or placements that can appear throughout a website, via a run of site

Facebook.com Jan 2009 to Mar 2010



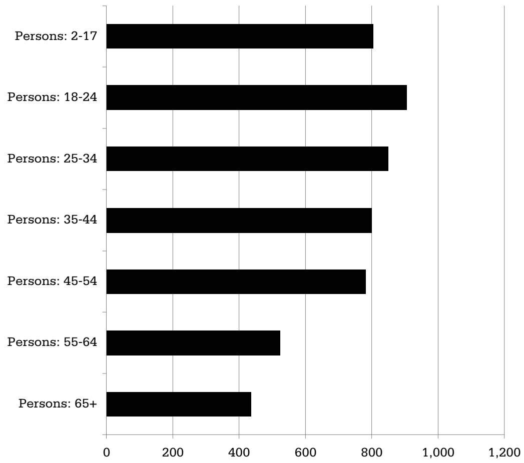
Search Market in Canada

Shares of Searches

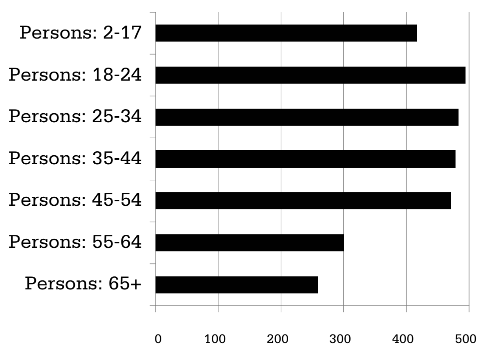


Social Media Trends – Facebook

Average Pages per Visitor



Average Minutes per Visitor



buy, a run of network buy, or within specific pages on a certain site, and are offered by the largest number of publishers and networks in Canada. The specifications have been standardized (dimensions, file sizes, etc.) to offer the greatest level of acceptance by suppliers, reducing the need for multiple versions of the same ad. The three principal sizes are the Leaderboard (728 x 90 pixels), Skyscraper (160 x 600 pixels) and the Big Box (300 x 250 pixels).
The link to the CUAP summary document for standard, rich media, video standards (includes creative/tag naming conventions) is www.iab-canada.com/standards/cuap 0708.pdf

BUYING STRATEGIES

For awareness campaigns, ad units can be placed on high traffic, high profile pages, like homepages or on a run-of-site basis to ensure a level of brand or content association, as well as context (i.e. auto ads on automotive websites). Certain permanent placements may be preferred due to the premium position. For post-click or post-impression performance, network placements often provide great volume and reach of the target audience in a cost-efficient manner. Most publishers and networks offer deeper levels of targeting, and ad delivery can be further filtered by category, content, interest, geography, etc.

SPONSORSHIP

Sponsorship takes a variety of forms depending on its purpose, often supported by banner placements or email marketing to increase exposure frequency. Homepage takeover is used for big blast awareness to promote a launch of new product or service. Advertorial and brand sponsorship is generally used to capitalize from the brand association with the publisher. Campaigns tend to have more room for creativity, as well as customized or exclusive branding and link placement, resulting in greater impact to the consumers.

ONLINE VIDEO/ BROADCASTING

With the change of consumer behavior and the availability of more online video content, popularity of online video is increasing. Average Canadian online viewing time increased by 53% from last year. As the audience is already in-the-video mind state, video ads can be an impactful engagement tool. Most commonly used video placements include: pre-rolls, post-rolls and in-unit videos. Premium charge is often required for pre-roll inventory due to the limited availability. However, in-unit videos can be run through any standard banner positions at regular CPMs with an additional ad serving fee only.

SEARCH ENGINE MARKETING

SEM (Search Engine Marketing) has typically been referred to as being at the bottom of the purchase funnel. This is to say that most television, out of home, print, radio or other campaigns an advertiser may have, are all driving to search. This is quite often the case; however, search is unique in having a presence at the beginning, middle and the end of the consumer purchase process. It's for this reason (among many others) that search has become an integral part of any media execution. There are billions of searches every month and being able to properly capitalize on the potential of this visibility should be a very important part of any marketing group.

WHY IS SEARCH SO IMPORTANT?

Canadian consumers are not only driven to search by other media, they often begin their research process online. Whether they need a phone number, an MP3 player or a new car, users are turning to search engines more and more for product research. Studies have shown that roughly 80% of users do their research through search engines before completing a purchase. That means that quite often, before the actual conversion takes place, users will look to search as a means of confirming the validity of their probable purchase decisions. It's at this moment that a company has the opportunity to present themselves as the "right choice."
SEM allows a business to select a list of keywords they want their brand(s) to receive exposure on. They must then create relevant ad copy to be displayed to users once the keyword(s) is typed in.
The SEM text ads will appear either to the top left or to the right in the "sponsored links" area. Each time a user clicks the ad, the advertiser would then be charged, and the user is sent directly to the advertisers' website. This cost-per-click (CPC) model ensures that customers are only paying for relevant site traffic. Each keyword also has the ability to drive to a specific landing page (destination after the click).

BIDDING AND CTR (CLICKTHROUGH RATE)

The 3 major search engines (Google, MSN's Bing and Yahoo!) have all implemented auction based systems in that an advertiser will choose their maximum CPC bid which will play a role in determining the position in which the ad appears in the search listings. The maximum CPC bid is simply the predetermined maximum amount an advertiser is willing to pay for each click generated in the search engines. Each keyword can have a unique CPC bid allowing a different set of strategies depending on the keyword type. The Search engines will never surpass this maximum, but depending on the levels of competition and various other factors, the CPC will almost always end up being less than the maximum CPC bid.
The second factor that comes into play when determining CPC and ad position is the clickthrough rate. An advertiser may be willing to have a high maximum CPC, but if few users are actually clicking on their ad, the ad is viewed by the search engines as irrelevant and the campaign is hindered by having to pay a higher CPC as a result. On the flip side, an advertiser can have a lower CPC bid but because of a great clickthrough rate, relevance and other performance metrics, the ads can still obtain premium positions in the search listings.

TRACKING

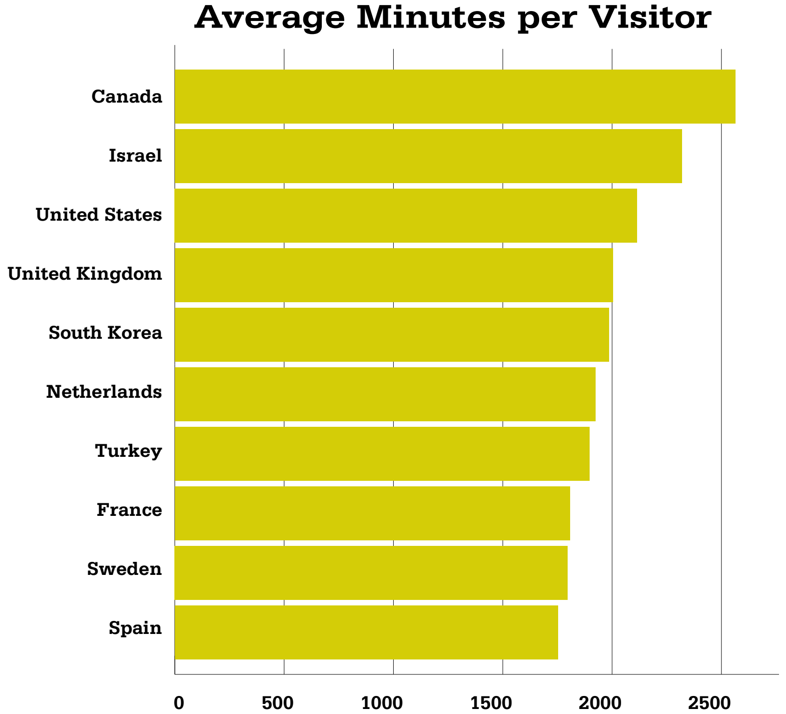
Once the user has clicked the ad, this is not the end of the process, but rather the beginning. With the multiple tracking tools available, search results can display which keywords/ads were clicked the most, generated the most leads, the most sales, generated the most revenue per sale and which offered the best return on investment (ROI).

ORGANIC OPTIMIZATION

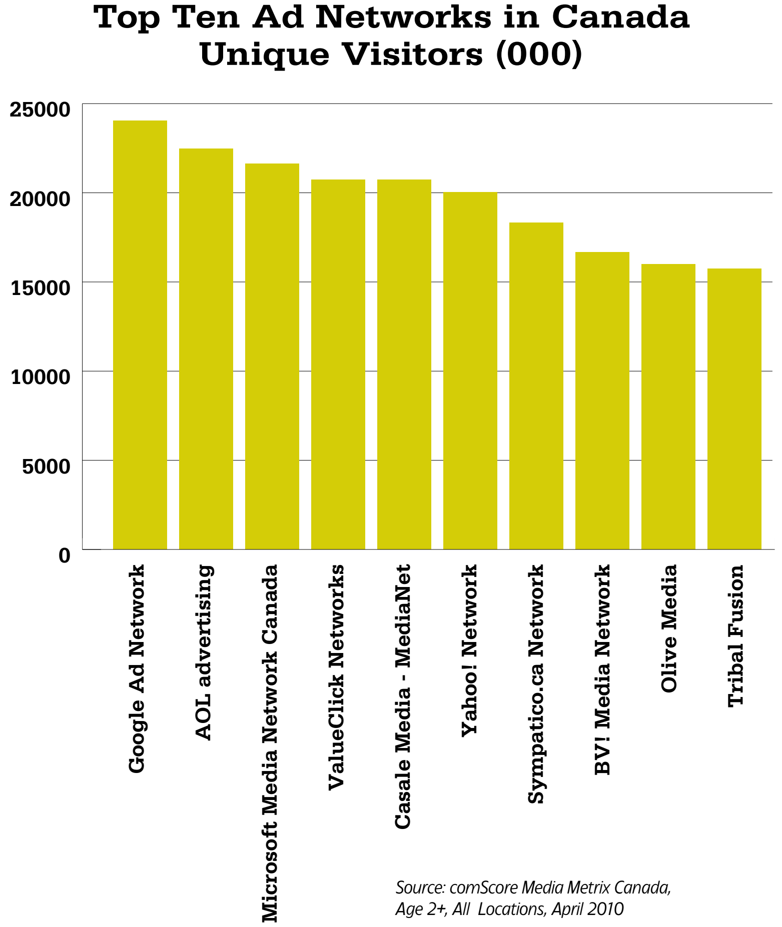
Search Engine Optimization (SEO) is about optimizing the content (words, images), structure (navigation, programming) and links (votes of confidence) to help improve a site's ranking on the search engines for a given set of relevant keywords.
The end goal of a SEO mandate is to increase organic search traffic (and sales) to one's website. The three components as SEO can be summarized as:
Creating a website the search engines can index so the site can be found when people carry out a search.
Creating content that describes products and services using words and phrases used by potential customers.
Securing links from other sites so show the search engines how important the site is.

WHY SHOULD COMPANIES CARE ABOUT SEO?

- 87% of all visitors are from a page 1 position
- 91% of Internet users use search engines
- Over 3 billion searches carried out monthly in Canada
- 73% of all online transactions start with search engines
- 3.5 billion websites compete for the top slots, but the reality is that only fractions of a percent reach the first page



Source: comScore Media Metrix, Persons 15+, All Locations, April 2010
Source: Wikipedia Population Estimates — as of May 2010



Source: comScore Media Metrix Canada, Age 2+, All Locations, April 2010

GAMING

GAMING

Online gaming in North America will grow significantly in the next five years, with almost 130 million online PC and console gamers projected by 2010, and 170 million by 2013. Major game releases can now rival or exceed Hollywood blockbusters. For example, *Avatar* generated box office sales of $242 million its first week of release, where as Call of Duty: Modern Warfare 2 reached $550 million in sales its first week of release.

IN-GAME ADVERTISING

Display advertising (static and animated) can be placed within a game environment itself on a computer, console or mobile game. The advertising is encountered during the course of playing the game and is measured by 'impressions.' An impression is recorded after a predetermined length of time of screen exposure.

There are two main forms of in-game advertising: static and dynamic. Static advertising is hard-coded directly into the game by game developers and must be planned months prior to game launch. Dynamic advertising is very much like online display ads–they load randomly and can be targeted by geographical location or time of day–and can be bought and inserted after the game is released.

Key players are Microsoft Advertising (Xbox Live); LoudMouthEntertainment (Sony Playstation); Wild Tangent (PC-based, computer casual gaming); and Google (PC-based games).

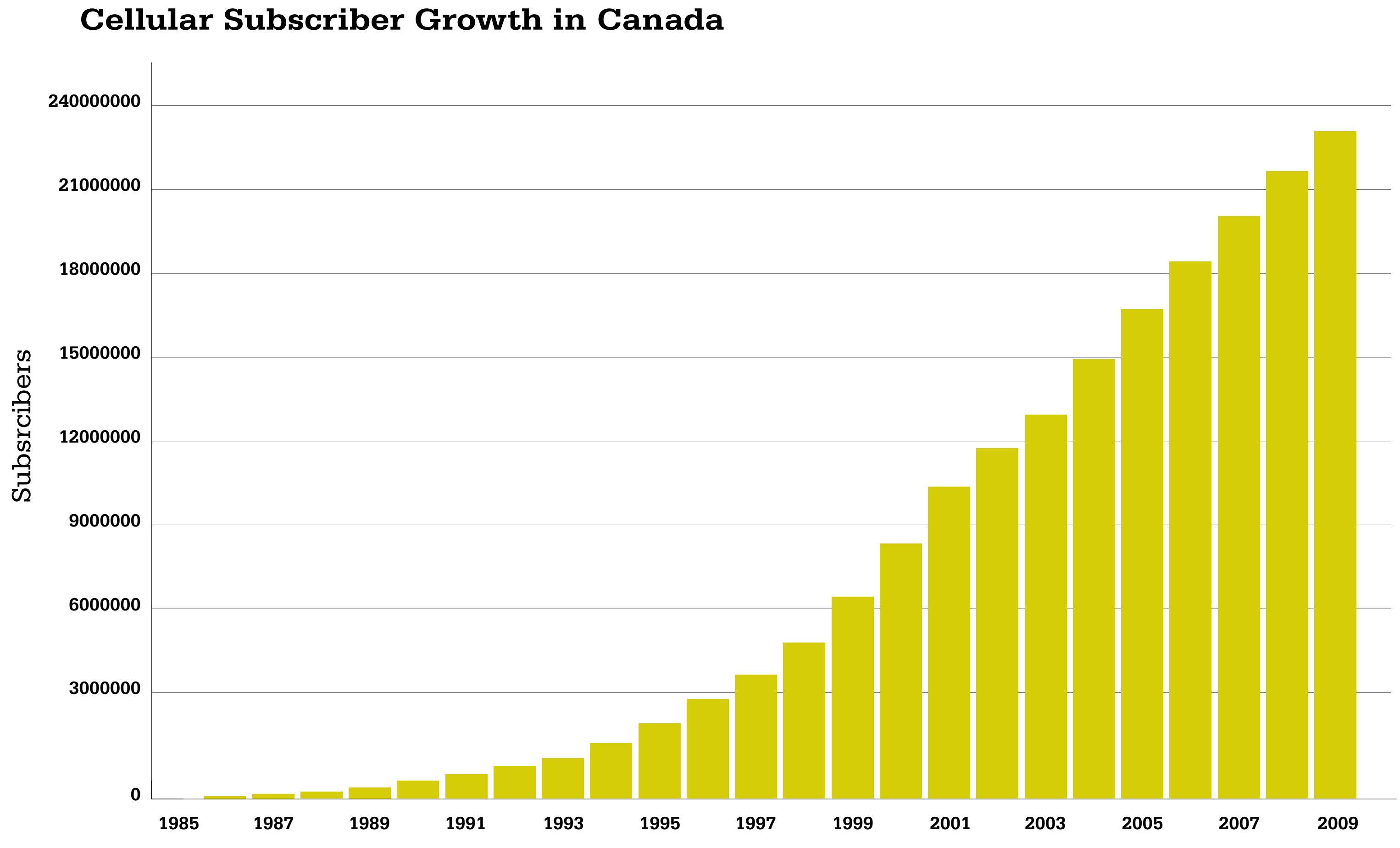
GAME PLATFORM ADVERTISING

Display advertising (static and animated) can surround the gaming experience both pre- and post-game on such platforms as consoles (Xbox Live) and computers (Wild Tangent). More and more, consumers access non-gaming media such as movies, TV shows and music via game devices such as computers and game consoles, so game platform advertising offers a way to reach consumers outside of traditional channels. An offshoot of platform advertising is organized gaming events, such as online tournaments.

Key players are Microsoft Advertising (Xbox Live); LoudMouthEntertainment (Sony Playstation); Wild Tangent (computer casual gaming).

ADVERGAMES

Advergames integrate the brand and brand messaging into the game experience and is most often employed to reach casual gamers. However, with the increased popularity of downloadable content and applications, there are increased opportunities to reach serious gamers.



Source: CWTA

MOBILE MEDIA

Wireless products, services and networks have become an essential part of Canadians' daily lives. Mobile subscribers numbered 22.8 million as of December 2009 and 75% of households now have access to a mobile phone. For many people, the mobile phone is replacing the traditional land line, eased by the fact that wireless carriers offer coverage to more than 99% of Canadians. According to the Interactive Advertising Bureau of Canada, mobile advertising revenue is also growing–from $1.1 million in 2006 to $2.7 million in 2007, and it was expected to reach $5.2 million in 2008.

While subscriber growth is set to continue as new carriers enter the market, saturation will eventually occur, positioning innovation as a key cornerstone for future growth. As devices improve, a greater percentage of people are upgrading to media services when they get a new handset. Although 25.8% of all phones shipped in 2008 were smartphones (a mobile phone with advanced, PC-like capabilities, like the iPhone or BlackBerry), this is relatively low compared to the worldwide figures. However, the penetration of smartphones in Canada is expected to increase, with current shipment numbers growing at twice the rate of the rest of the world. Barriers to entry like data plan and device costs are constantly being lowered and smartphone use is rapidly becoming more prevalent.

The extensive digital wireless networks available to Canadians allow users to broaden and customize their mobile experience. Devices have moved beyond simple voice calls and text messages and can now provide access to e-mail and instant messaging, corporate networks and the Internet.

MOBILE WEB

- Mobile websites are specifically designed to be viewed on mobile devices such as mobile phones and PDAs.
- Wireless Application Protocol (WAP): World standard for the presentation and delivery of wireless information and services on mobile phones and other wireless terminals. A WAP browser provides all of the basic services of a computer-based web browser but is simplified to operate within the restrictions of a mobile phone (i.e. smaller screen).
- Ad Banner: static logo or image, text or combination of these.
- Ad full-page image: full screen advertisement, which may be placed as a "bumper" for the launch or exit of the application or as a splash or jump-page (formerly called interstitials) within the application.

APPLICATIONS

With growing smartphone adoption, particularly of the iPhone, mobile apps have become a significant part of the mobile landscape.

These applications are either pre-installed on phones during manufacture, or downloaded by customers from app stores and other mobile software distribution platforms.

Applications can be ad-supported and offer all manner of functionality, including location-based services, news, weather and more. In April of 2010, Apple announced the launch of iAd, an ad networking, hosting, insertion and development company that places ads within applications without interrupting the application experience.

TEXT MESSAGING

Text Message or SMS (Short Message Service) allows mobile customers to send, receive and view short text messages.

- Reach a more pressed-for-time, hyper-tasking mobile consumer.
- Short Codes let users interact with media outlets, companies and other sources of information, products or services. They are easy and fast – five or six digits long – and can spell a word or brand name.
- Short Codes are administered by the CWTA (Canadian Wireless Telecommunications Association)

MULTIMEDIA MESSAGING SERVICES (MMS)

- Messages that include multimedia content that can be sent to and from mobile phones, and can include images, video and sound.
- Media publishers are beginning to use MMS to distribute mobile content.
- Challenges with content adaptation and handset configuration can make it difficult to use MMS for marketing and bulk messaging purposes.

BLUETOOTH

- Name of a short-range radio frequency (RF) technology that is capable of transmitting voice and data.
- Bluetooth can be used to synchronize and transfer data among devices without connecting cables.
- Consumers need to have Bluetooth turned on or enabled in order to receive content.
- Allows for permission-based marketing–user will receive a request from a broadcaster and upon accepting will be sent the content to download directly to their mobile phone.

SUPPLIERS OF MOBILE AD INVENTORY

- **AD MOB:** A mobile ad network recently purchased by Google. www.admob.com
- **AOL**
- **CANOE:** Site is available to browse from any internet-enabled device. www.qmisales.ca/digital/mobile-advertising.html
- **IMPACT MOBILE:** Activate Interactive or Traditional Media. www.impactmobile.com/index.php
- **MSN:** Delivers ads against premium content on the MSN Mobile home page, MSN Sports, MSN Autos, MSN Money, and more. http://advertising.microsoft.com/canada/en/Advertise/ad-solutions/mobile
- **POLAR MOBILE:** Their content and advertising platform provides publishers, brands and advertisers the tools to deliver, measure and monetize digital media on all major mobile devices, including iPhone, BlackBerry, Android and Windows Mobile. www.polarmobile.com/
- **QUATTRO MOBILE:** Their mobile web and in-application advertising network includes thousands of mobile websites and iPhone, Android and other smartphone applications. Recently purchased by Apple. www.quattrowireless.com/
- **THE SCORE:** Mobile web and apps for sports fans. http://www2.thescore.com/scoremobile/
- **SYMPATICO.CA MOBILE NETWORK:** Canada's leading premium ad network with offerings across mobile web, apps, SMS and development. Visit symbl.ca for more.
- **WEATHER NETWORK:** Real time weather information available through the mobile web, text messaging or variety of apps. www.theweathernetwork.com/advertising/advindex
- **YAHOO:** Offers a comprehensive set of mobile ad products–including display advertising and mobile ad tools. http://ca.mobile.yahoo.com/business/advertiser

Internet Data Sources

COMSCORE MEDIA METRIX COMSCORE CANADA

90 Sheppard Ave. E., Ste. 1000
Toronto, ON, M2N 3A1
Phone: (416) 642-1002
Fax: (416) 642-1007
comscore.com

Company Overview

comScore Media Metrix, a division of comScore Canada, provides Internet audience measurement services that report details of website usage, visitor demographics and online buying power.

Product Overview

comScore Media Metrix research and products include the following:

- Comprehensive metrics detailing online media usage for home, work and French-speaking audiences.
- Complete online visitor demographics.
- Qualitative audience detail linked to electronically captured online usage.
- Global audience measurement in over 30 countries.
- An advanced content classification system and reporting structure.
- Detailed measurement of online search behaviour.

COMSCORE SURVEYSITE COMSCORE CANADA

comScore SurveySite is an online market research firm that provides quantitative and qualitative research. SurveySite's focus is on translating research objectives into successfully managed projects.

TNS MEDIA INTELLIGENCE – EVALIANT SERVICES

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E-mail: infocanada@tns-mi.com
tns-mi.com

Company Overview

Evaliant Services, a division of TNS Media Intelligence, is a provider of online advertising data. Evaliant tracks more than 100,000 brands and products on thousands of sites in North America. In Canada, over 450 English and French sites are tracked daily. U.S. Internet data are also available with more than 2,000 sites tracked.

Webvertising

AD NETWORKS

www.casalemedia.com

Company Name:
Casale Media Inc.
Parent Company:
Casale Media Inc.

Address:
74 Wingold Ave.
Toronto, ON
M6B 1P5

Tel: 416-785-5908
Fax: 416-785-5689
Toll-free: 1-888-227-2539
Contact: Victor Amorim,
victor.amorim@casalemedia.com

Traffic

Unique Visitors:
20,902,000/Month

Page Views:
5,191,000,000/Month

Website Profile

Casale Media's MediaNet is Canada's largest independently owned advertising network, reaching more than 85% of the Canadian digital audience. Founded and headquartered in Toronto, we proudly provide advertisers with more coverage of Canadian content than any other network. In addition to our coverage accross more than 3,000 widely recognized premium properties, we are also the exclusive Canadian sales agent for some of the Web's hottest destinations including eBay.ca, iVillage, NBC Sports and Access Hollywood.

User Profile

MediaNet® provides brands with scalable reach to every major demographic segment online through its 19 core consumer verticals and 80 content channels; MediaNet skews highest to adults 18+ with online buying power.

Ad Rates

Casale Media Accepts banners, towers, rectangles, overlays; in-banner video/expnadable rich media; over 1 billion ads delivered daily. To inquire about rates, volumes and how to advertise with us, please call 416-785-5908.

Inventory

- Banner Ads
- Rich Media
- Sponsorships
- Tower Ads
- Video

Tech Specs

Casale Media accepts the following ad units: 728x90, 120x600, 300x250,336x280. Please visit www.casalemedia.com/ad_specifications for more detail.

Member of the IAB comScore Media Metrix, July 2010

www.globeandmail.com

Company Name:
The Globe and Mail
Parent Company:
CTVglobemedia Publishing Inc.

Address:
444 Front Street West
Toronto, ON
M5V 2S9

Contact:
Jo-Anne Johnson, Sr. National Sales Manager, Canada, USA and Europe:
jajohnson@globeandmail.com
Tel: 416-585-5000

Traffic

Unique Visitors:
3,315,000/Month

Page Views:
92,000,000/Month

Average Visit Length:
26.7 minutes

Website Profile

The Globe's digital network is Canada's #1 online newspaper destination, delivering breaking and business news, sports, auto and lifestyle content. It encompasses our flagship newspaper website, Globeandmail.com, along with a variety of individual content areas, such as Business, Investing, Sports, Life and Auto. While these sites correspond to their newspaper counterparts, they're enhanced with interactive features and utility -- enabling reader commenting, blog pages, podcasts, and live streaming video, to name a few of the features to engage readers. Our Globeinvestor.com site offers a wealth of financial reporting and investing tools, along with some unique enhancements created from time to time in partnership with sponsor advertisers. In addition, our ultra-engaged readers have the option of registering for globeinvestorgold.com, which provides access to additional Globe and Mail content and databases, and features such as past newspaper page pdfs and articles.

User Profile

We understand that advertising is as much an art as a science, so we spend a great deal of time quantifying our reach, our audience and advertising effectiveness – both in our print and online products. Ask any media expert about The Globe and Mail and they will tell you a brand benefits far more from advertising within our products than the numbers initially suggest. Here's why:

- Your brand's message is reinforced by real life opinion-makers who buy into your brand as a result of the relationship you develop with them through us;
- Your brand's ads help to fuel our readers' aspirations, while you reach an audience who has the income to act on your offerings, and;
- Your brand borrows from the credibility we have established as Canada's most decorated newspaper, with 125 National Newspaper Awards, since the awards were established in 1949.

Ad Rates

We offer a full range of IAB compliant advertising formats, from simple banners and buttons to dynamic Flash animated, video-based, expanding and floating ad placements. Our online production team is committed to working with you to successfully implement any creative campaign. Our goal is to present your brand's message in the most compelling and memorable way. Visit www.globelink.ca/digital/adformats for further details, or contact your sales rep.

Inventory

- Animation
- Audio
- Banner Ads
- Button Ads
- Co-branding
- Content Integration
- Contests
- Email Marketing
- E-Newsletter Sponsorship
- Interstitials
- Micro Sites
- Research
- Rich Media
- Sponsorships
- Text Links
- Tower Ads
- Video

Tech Specs

For advertising specifications, please visit globelink.ca/adformats

www.gorillanation.com

Company Name:
Gorilla Nation

Address:
69 Yonge Street
Suite 800
Toronto, ON
M5E 1K3

Tel: 416-593-3778
Fax: 416-599-3778
Contact:
Walder Amaya, VP of Canadian Operations - walder.amaya@gorillanation.com

Traffic	Website Profile	User Profile	Ad Rates	Inventory
Unique Visitors: Unduplicated: 15,294,282/Month **Page Views:** 447,802,000/Month **Average Visit Length:** 4.78 minutes	Gorilla Nation is the world's largest online branded sales company, exclusively representing the online branded ad inventory of over 500 premium content sites. GN is focused on selling site-specific, integrated media and promotional programs accross its properties on behalf of Fortune 500 brand marketers - marrying message with media. Working closely with its web publisher partners, GN's expertise within 30 select vertical markets provides advertising clients the ability to build high impact, rich media programs across one or more properties to provide superior audience reach, site-specific creative frequency, guranteed media placements and integration of message to contextually relevant audiences. The company is committed to delivering integrated creative media programs, from concept through execution, and exceptional customer service. Founded in 2001, Gorilla Nation is headquartered in Los Angeles with offices in New York, Chicago, San Francisco, Scottsdale, Toronto, London, Sydney and Melbourne.	Gorilla Nation offers a one-stop advertising solution across a wide selection of content verticals and key demographic segments. Not only offering display media, Gorilla Nation is at the leading edge of content integration and custom creative executions both on a site-specific basis as well as on broad reach scale. With strong partnerships with leading publishers in Film, Male Lifestyle, Women Lifestyle, Kids/Tweens, Gaming, and Video, Gorilla Nation is your key partner in creating scalable, customizable programs to serve your advertising needs.	For information on rates and advertising capabilities, please call 416.593.3778 ext 2142 or contact walder.amaya@gorillanation.com	• Banner Ads • Button Ads • Co-branding • Content Integration • Contests • E-Newsletter Sponsorship • Microsites • Video • Rich Media • Sponsorships • Text Links **Tech Specs** Please E-Mail for Technical Specs & Availability

Based on comScore Media Metrix, July 2010

www.suite66.com

Company Name:
Suite 66
Parent Company:
Rydium Canada Inc.

Address: 366 Adelaide St. West, Suite 600
Toronto, ON
M5V 1R9

Tel: 416-628-5565
Fax: 416-628-5561
Toll-free: 1-866-779-3486
Contact: Steve Macfarlane, smacfarlane@suite66.com

Traffic	Website Profile	User Profile	Ad Rates	Inventory
Unique Visitors: 15,000,000/Month	Suite 66 is Canada's largest independent online sales agency. We provide marketers with advertising opportunities on independently owned and operated Canadian sites and US based sites. The combination of Suite 66 Sites and the Suite 66 Performance Network gives advertisers a wide range of options. Publishers benefit from our proactive sales efforts to communicate the advantages and benefits of their sites.	National reach through key content categories including: automotive, business, education, entertainment, fashion, food, home, kids, lifestyle, news, sports and technology. Visitors to these sites include all demographic targets such as young adults, women 18-34, men 18-34 and adults 25-54. We reach business people, car shoppers, home owners, fashion followers, movie fans, sports fans, kids, students and parents.	Please contact Suite 66 for site specific rates, Performance Network rates and other opportunities including email, sponsorships, and customized solutions.	• Banner Ads • Button Ads • Content Integration • Contests • Email Marketing • E-Newsletter Sponsorships • Micro Sites • Rich Media • Sponsorships • Tower Ads • Video **Tech Specs** Standard IAB specifications apply. Please contact Suite 66 for your specific needs.

Member of the IAB

www.torstardigital.com

Company Name:
Torstar Digital
Parent Company:
Torstar Corporation

Address:
590 King St. West
Toronto, ON
M5V 1M3

Tel: 416-687-5700
Fax: 1-866-473-3921
Contact:
info@torstardigital.com

Traffic	Website Profile	User Profile	Ad Rates	Inventory
Unique Visitors: 16,756,000/Month **Page Views:** 3,775,000/Month	Torstar Digital, a leader in the Canadian digital media landscape, operates a portfolio of leading digital businesses including web development (TOPS), online media properties (including thestar.com and toronto.com), online marketing services (eyeReturn Marketing) and one-stop online advertising sales through Olive Media.	A national reach of highly targeted Canadians. Our audience is comprised of engaged web enthusiasts across multiple interest areas, including sports, autos, technology, entertainment, news, business, and finance.	To inquire about how you can advertise with us, email info@olivemedia.ca	• Banner Ads • Button Ads • Co-branding • Content Integration • Contests • E-mail Marketing • E-Newsletter Sponsorship • Rich Media • Special Events • Sponsorships • Tower Ads

comScore Media Key Measures Report, Advertising Networks Category, July 2010
Member of the IAB

INFORMATION/ENTERTAINMENT/SEARCH

canoe.ca
A Quebecor Media Company

www.canoe.ca

Company Name:
Canoe.ca
Parent Company:
Quebecor Media Inc.

Address:
333 King Street East
Toronto, ON
M5A 3X5

Tel: 416-350-6379
Fax: 416-947-2152
Contact:
Vivian Ip,
vivian.ip@qmisales.ca

Traffic	Website Profile	User Profile	Ad Rates	Inventory
Unique Visitors: 9,400,000/month **Page Views:** 452,000,000/Month **Average Visit Length:** 28.2 minutes/visitor	Canoe is Canada's leading portal to Canadian content, providing news, information, classifieds and entertainment.	Canoe.ca is one of Canada's most viewed networks, attracting 9.4 million unique visitors each month, nationally. Canoe.ca reaches 70% of French Canadian Internet Users monthly.	For more information regarding advertising on the Canoe.ca network, please contact your National Sales Executive, or contact us at info@qmisales.ca (Underline)or 416-350-6379.	• Animation • Audio • Banner Ads • Button Ads • Co-branding • Content Integration • Contests • E-Newsletter Sponsorship • Interstitials • Pop-ups • Research • Rich Media • Special Effects • Sponsorships • Text Links • Video **Tech Specs** Specifications vary by ad unit, however we can accept most formats.

Figures are audited (comScore Media Metrix)
comScore Media Metrix, Key Measures Report, July 2010
Member of the IAB

www.eyeweekly.com

Company Name:
EYE WEEKLY
Parent Company:
Toronto Star

Address:
1 Yonge St. 2nd Floor
Toronto, ON
M5E 1E6

Contact:
Christeen Comeau,
ccomeau@eyeweekly.com
Tel: 416-933-3433
Fax: 416-933-3484

Traffic	Website Profile	User Profile	Ad Rates	Inventory
Unique Visitors: 180,000 Visits/Month 138,000 Uniques/Month **Page Views:** 600,000/Month **Average Visit Length:** 4.20 minutes	Toronto's source of news and entertainment information and commentary.	Toronto's Ultimate urban lifestyle and entertainment guide for urban professionals 18-34.		• Banner Ads • Contests • E-Newsletter Sponsorship • Rich Media • Sponsorships **Tech Specs** Please e-mail for technical specs & availability

** May 2010*

www.metronews.ca/www.journalmetro.com

Company Name:
Metronews.ca
Parent Company:
Torstar Corporation

Address:
625 Church St. 6th floor
Toronto, ON
M4Y 2G1

Tel: 416-486-4900
Fax: 416-486-4035
Contact:
hailey.benizhak@metronews.ca

Traffic	Website Profile	User Profile	Ad Rates	Inventory
Unique Visitors: 585,000/Month 1,700,000/Month Page Views on Web, Avg 3 pageviews per visit 2,700,000/Month on Mobile, Avg 10 pageviews per visit	Metronews.ca and Journalmetro.com are the news sites of Canada's most read newspaper. They feature updated local and world news, entertainment and lifestyle content for Canada's top 7 markets.	Exhibiting the traits of the Metro brand, our sites aim to target young minded, active, metropolitans (YAM's).	ROS display campaigns, section and home-page takeovers, sponsorships, custom contextual content, microsites, contests, e-newsletters (database of 10,000+), casual games. Contact a sales rep for a customized package.	• Banner Ads • Button Ads • Co-branding • Content Integration • Contests • E-Newsletter Sponsorship • Gaming • Micro Sites • Rich media • Sponsorships • Video

Omniture Site Catalyst and Google Analytics Jan–June 2010 (Web)
Server Data Jan–June 2010 (Mobile)

Direct Marketing

Direct response marketing is designed to solicit a consumer response and encourage the customer to contact a company directly. It can be used to acquire new customers or generate repeat business with established ones. Results can be tracked and measured daily, providing a daily and weekly ROI. As well, the live schedule can be continuously optimized.
There are six key elements that need to be taken into consideration when planning a direct response campaign.

1. THE OFFER A direct response advertisement is comprised of three main components–product information, sales proposition and a response mechanism. The most important component is the response mechanism. One must tell people what to do and how they will benefit. Time sensitive special offers tend to generate an immediate response. Once the consumer is intrigued with the initial offer, one can up sell them when they respond on additional products or services.

2. THE CREATIVE There are special techniques that go into producing a direct response commercial that will ensure it will generate a response. It is not as simple as adding a toll-free number to a commercial or ad. The cost of developing or editing a DRTV short-form or long-form commercial is wide ranging and can be anywhere from $25,000 to $750,000, depending on the quality, length, actors and the experience of the company that is producing it.

3. THE MEDIA Almost any media platform used for traditional marketing can be used for direct response. However, depending on the advertising objectives, the cost per response can vary widely.

Print includes major daily and community newspapers, consumer and trade magazines and free standing inserts (FSIs). Utilizing an existing subscriber base of a magazine or newspaper to reach a potential audience can be an efficient method of finding a DM target. A stand-out print ad diverts someone's attention from the editorial to the ad. Make the opening statement or headline powerful and valuable. Use interesting graphics and visuals that arrest the senses with a call to action.

Direct Mail (DM) includes addressed and unaddressed mail, flyers, door hangers, polybags and coupon envelopes. A successful mailing must reach the right person, be read by that person, and it must persuade that person to buy something or at least respond for more information from the company. The mailing
list must be as targeted, accurate and current as possible. Lists can be rented or purchased from companies who specialize in address data management. Access lists can sometimes be provided by magazine publishers, membership directories, local organizations, public records and telephone phone directories. Unaddressed mail can be used to target postal codes available through Canada Post. There are distribution companies that can narrow down the target audience by city, neighborhood, postal code, FSA and even postal walk.

Television DRTV is different than a brand buy, focusing less on GRPs and much more on the cost per minute. The purpose is to get an effective ROI from the TV (low cost per call, cost per lead) versus creating an 'impression.'
DRTV can be bought in a number of ways:
Remnant Time: most popular, it is unsold inventory and can be purchased at a lower cost.
Blended Buy: a mixture of remnant time and prime time.
Per-Inquiry Basis: stations are compensated based on the number of responses (calls) driven by the DRTV spot. This is not that common.
Custom: DRTV commercials can play on almost any station, any time of day–it depends on the objectives and the budget.
Short form DRTV can be 15, 30, 60, 90 and 120 seconds in length. Long form DRTV, also known as infomercials or paid programming, are usually 30 to 60 minutes in length. Most TV stations have allocated certain times of the day for paid programming, primarily late night and early morning. DRTV is typically bought on a 52-week basis and is available on most stations.

Radio commercial lengths are usually 15, 30 and 60 seconds in length, but longer commercial time is available.

4. RESPONSE & MEDIA TRACKING The major benefit with direct response advertising is the ability to continuously measure and optimize the ROI of a campaign. Toll-free numbers, promotional codes and unique URLs are used as markers for measurement. Success metrics include the number of calls, leads, applications and sales that are completed versus what it cost to generate the actions.
The Broadcast Verification System (BVS) is a third party tracking tool for television that detects and delivers commercial activity data overnight. The commercial must have a "veil encoded strip" embedded by a production house prior to shipping spots to stations. The resulting reporting on clearance levels outlines when, where and if the broadcast commercials aired. It is a resource to agencies and advertisers, networks and syndicators. Production houses in Canada equipped to handle the encoding are CFA Communications and MIJO Corporation. Eloda is another third party tracking tool for television, using direct-from-satellite and other source monitoring coupled with patented AdDNA, technology for ad recognition, indexing and valuation for occurrence validation.

5. CUSTOMER CALL SERVICE There are many third party call centres (telemarketers) in Canada that will handle the response by taking calls, orders, upselling other products or services, reporting and providing customer service. Some advertisers prefer to set up a call centre in house but consideration must be given to the ability to handle a high volume of calls coming in 24 hours a day. Many potential customers will spend no more than 1 to 3 minutes on hold and will tend not to call back if the lines are busy. It is just as important to provide an immediate response for the customer when they call in as it is to develop creative to elicit an immediate response from them.

6. PRIVACY The knowledge and consent of the individual is required for the collection, use, or disclosure of personal information, except where inappropriate. Consent is defined as a customer's agreement for the future use of his or her personal information for marketing purposes, subject to the following industry definitions of types or degrees of consent:
IMPLIED CONSENT is used to communicate with one's own customers, such as sending out a magazine subscription renewal notice or a solicitation for a further donation.
OPT-OUT CONSENT is used to grant permission for use of the customer's information to send future marketing offers or solicitations not directly related to the original transaction, as well as to grant permission for the transfer of the customer's personal (non-sensitive) information to a third party. (Example: a list rental of newspaper subscribers' names and addresses for marketing purposes).
POSITIVE OR OPT-IN CONSENT is required for the transfer of information a reasonable person

would consider sensitive, to a third party (Example: financial or health information, or certain video rentals or magazine subscriptions).

The Personal Information Protection and Electronic Documents Act, also known as PIPEDA, has been coming into effect in stages.

Phase One: the act applied to personal information about customers or employees in the federally regulated sector – such as banks and telecommunications companies.

Phase Two: PIPEDA was extended to cover personal health information collected, used or disclosed by these organizations.

Phase Three: Covers all personal information of customers that is collected, used, or disclosed in the course of commercial activities by private sector organizations, except in provinces that have enacted legislation deemed to be substantially similar to the federal law.

One of the biggest examples of the increased challenge facing direct marketers is the National Do Not Call registry set up in 2009.

DIRECT MARKETING SUPPLIERS

There are several agencies and consultants that offer complete project management, while others specialize in one or more specific areas:

MEDIA MANAGEMENT AGENCIES assist with the strategy, including targeting, planning, execution, data analysis and reconciliation.

CREATIVE AGENCIES assist with concept strategy, copy and design of print and broadcast production.

LIST BROKERS/MANAGERS provide mailing list services including identification and segmentation.

DIRECT MAIL PRODUCTION COMPANIES handle printing, distribution, database/ list rental management, printing and Canada Post regulations.

FULFILLMENT CENTRES store, process and ship inventory, as well as track movement and expenditures.

CALL CENTRES/TELEMARKETING SERVICES offer inbound and/or out-bound telephone and/ or Internet CSRs for customer service, sales, surveys, call-data reporting and support.

Flyers

FLYERS/INSERTS/ PREPRINTS

There are more than 10 billion flyers distributed annually in Canada at a cost in excess of $1.5 billion. The “media” is approximately 30% of the cost, with the balance made up by pre press, print production and transportation to the media. The largest sample variable is print production, where the stock and number of pages can make a huge difference in the CPM.

Flyers are a medium that largely relies on the customer’s interest in the product category to gain readership. Consequently, the best efficiency (ROI) can be achieved by targeting households with the highest propensity to purchase the category at a given location(s).

The media distributors have created a very flexible selection process that lets advertisers choose relatively small geographic areas and the type of dwelling desired.

FLYER MEDIA

The media principally falls into two categories: Subscriber with (or without) Extended Market Coverage and Total Market Coverage.

SUBSCRIBER NEWSPAPERS: Paid publications that are published 5 to 7 days per week. Papers are distributed to subscribers (Subs) or through Single Copy Sales (SCS). Houses and apartments are generally not separable.

EMC (EXTENDED MARKET COVERAGE): Flyers distributed to non subscribers of daily newspapers. Delivery is houses and/or apartments and one day a week, usually Friday or Saturday.

TMC (TOTAL MARKET COVERAGE – within specified geography) Flyers distributed to all deliverable households. Delivery is houses and/or apartments. Canada Post and some distributors also provide coverage to businesses.

TMC DISTRIBUTORS

COMMUNITY PAPERS: A newspaper that is published 1 to 3 times per week and distributed at no cost.

SHOPPERS: Like a community newspaper, except there is little or no editorial content; one day per week.

TRUCK & CREW DELIVERY: With or without a bag. Non-publishing distributors of flyers and community papers. One to 3 days per week; sometimes with a 2-day delivery window.

UNADDRESSED ADMAIL: Canada Post delivery to houses and/or apartments and/or businesses. Five days a week, but with a 3-day delivery window.

FLYER GEOGRAPHY

Each distributor can provide targeting to one or more of the following geographic units. Generally, subscriber papers provide FSA or Zones (sometimes CTs or DAs for EMC coverage). Most TMC distrbutors provide CTs, DAs and/ or Routes.

***ZONES:** Multiple FSAs

***FSA** (Forward Sortation Area): The first 3 digits of the Postal Code (e.g. L6H) comprising of 4,000 to 20,000+ households. Urban codes A1 to A9, Rural codes A0.

LDU (Local Delivery Unit): The last 3 digits of the Postal Code (2H5), used to locate communities within a rural FSA or city block or apartments within an urban postal walk. Urban LDUs are 10 to 200 households, rural are 50 to 4,000.

POSTAL WALK: The local geographic area within an urban FSA with multiple LDUs or approximately 300 to 600 households.

***CT** (Census Tract): Stats Canada Geographic Area approximately 1,000-3,000 households.

***DA** (Dissemination Area)**:** Stats Canada’s smallest unit of geography, approximately 400 to 700 households. (Prior to 2001–EA Enumeration Area).

DISTRIBUTOR ROUTE: Non-standard geography of approximately 100 to 500 households.

**indicates standard geographic boundaries.*

TARGETING METHODS

Targeting refers to “Ranking Geography” so that a selection process can choose the areas that meet the budget or pre-determined cut off.

Attributes can be assigned based on:

1. AVERAGE SALES/POSTAL CODE (collected by Retailer)

2. DEMOGRAPHICS (average household income, family size, etc.)

3. PSYCHOGRAPHICS (Consumer Lifestyle Clusters)

4. CSP (Consumer Spending Potential – by category) aka FAMEX (Family Expenditure)

5. DISTANCE OR DRIVE TIME (from store)

Or a combination of any two or more of the above.

FLYER DISTRIBUTION STANDARDS ASSOCIATION (FDSA)

The Flyer Distribution Standards Association addresses issues shared by retailers, distributors, printers, binderies, transport companies and media agencies. Its mandate is to establish standards for the retail flyer process, from technical specifications to processes and terminology, to increase efficiency for the entire industry.

For information about the FDSA
please contact:

FDSA
c/o Retail Council of Canada
1255 Bay Street, Suite 800
Toronto, ON
M5R 2A9
Phone: (416) 922-0553
Fax: (416) 922-8011
www.fdsa-canada.org

Associations

Name	Phone	Toll Free	Fax	E-mail	Website
Advertising Agency Association of BC	(604) 694-0844		(604) 694-0845	david@hyphenweb.com	www.aabc.ca
Advertising Association of Winnipeg	(204) 831-1077		(204) 885-6265	info@aaw.org	www.aaw.org
Advertising Standards Canada	(416) 961-6311		(416) 961-7904	info@adstandards.com	www.adstandards.com
Alberta Weekly Newspaper Association	(780) 434-8746	866-669-2262	(780) 438-8356	info@awna.com	www.awna.com
Association de la Presse Francophone	(613) 241-1017		(613) 241-6313	apf@apf.ca	www.apf.ca
Association des Médias Écrits Communautaires du Québec	(514) 383-8533	1-800-867-8533	(514) 383-8976	medias@amecq.ca	www.amecq.ca
Association of Canadian Advertisers	(416) 964-3805		(416) 964-0771	rscotland@acaweb.ca	www.acaweb.ca
Association des Agences de Publicité du Québec	(514) 848-1732		(514) 848-1950		www.aapq.ca
Atlantic Community Newspapers Association	(902) 832-4480	1-877-842-4480	(902) 832-4484	info@acna.com	www.acna.com
Audit Bureau of Circulations (ABC)	(416) 962-5840		(416) 962-5844	marian.robertson @accessabc.com	www.accessabc.com
British Columbia and Yukon Community Newspapers Association	(604) 669-9222	1-866-669-9222	(604) 684-4713	info@bccommunitynews.com	www.bccommunity news.com
BBM Bureau of Measurement	(416) 445-9800		(416) 445-8644	info@bbm.com	www.bbm.ca
Broadcast Research Council of Canada	(416) 413-3864		(416) 413-3879	brc@tvb.ca	www.brc.ca
Broadcast Executives Society	(416) 899-0370			admin@bes.ca	www.bes.ca
Bureau de Commercialisation de la Radio du Québec	(514) 528-0888		(450) 664-4138		www.bcrq.com
Canadian Advertising Research Foundation (CARF)	(416) 413-3864		(416) 413-3879	carf@tvb.ca	www.carf.ca
Canadian Association of Broadcast Representatives	(416) 764-3159		(416) 7643188	info@cabr.ca	www.cabr.ca
Canadian Association of Broadcasters (CAB)	(613) 233-4035		(613) 233-6961	cab@cab-acr.ca	www.cab-acr.ca
Canadian Association of Ethnic Radio Broadcasters	(416) 531-9991		(416) 531-5274	info@chinradio.com	www.chinradio.com
Canadian Business Press	(416) 239-1022		(416) 239-1076	admin@cbp.ca	www.cbp.ca
CCAB, Division of BPA Worldwide	(416) 487-2418		(416) 487-6405	info@bpaww.com	www.bpaww.com
Canadian Community Newspapers Association (CCNA)	(416) 482-1090	1-877-305-2262	(416) 482-1908	info@ccna.ca	www.community news.ca
Canadian Magazine Publishers Association	(416) 504-0274		(416) 504-0437		www.magazines canada.ca
Canadian Marketing Association	(416) 391-2362		(416) 441-4062	info@the-cma.org	www.the-cma.org
Canadian Media Directors' Council (CMDC)	(416) 921-4049			jsc@janetcallaghan.com	www.cmdc.ca
Canadian Newspaper Association (CNA)	(416) 923-3567		(416) 923-7206	info@cna-acj.ca	www.cna-acj.ca
Canadian Out-of-Home Measurement Bureau	(416) 968-3823		(416) 968-9396	nwillim@comb.org	www.comb.org
ComBase		1-800-481-6580		info@combase.ca	www.combase.ca
Le Conseil des Directeurs Médias du Québec	(514) 990-1899			info@cdmq.org	www.cdmq.ca
Hebdos du Québec	(514) 861-2088	1-866-861-2088	(514) 861-1966	communications@hebdos.com	www.hebdos.com
Independent Publishers Association of Ontario	(416) 534-9572			wseto@careerinsider.ca	www.ipao.ca
Institute of Communication Agencies (ICA)	(416) 482-1396	1-800-567-7422	(416) 482-1856	ica@icacanada.ca	www.icacanada.ca
Interactive Advertising Bureau of Canada (IAB)	(416) 598-3400	NA	(416) 598-3400	pgignac@iabcanada.com	www.iabcanada.com
Magazines Canada	(416) 504-0274		(416) 504-0437	info@magazinescanada.ca	www.magazines canada.ca
Manitoba Community Newspapers Association	(204) 947-1691	1-800-782-0051	(204) 947-1919	tanis@mcna.com	www.mcna.com
NADbank	(416) 923-3569		(416) 923-4002	lmilton@nadbank.com	www.nadbank.com
National Advertising Benevolent Society of Canada (NABS)	(416) 962-0446	1-800-661-6227	(416) 962-9149	nabs@nabs.org	www.nabs.org
Office de la Distribution Cerifiée	(514) 393-5139		(514) 393-5289	info@odcinc.ca	www.odcinc.ca
Ontario Association of Broadcasters	(905) 554-2730		(905) 554-2731	memberservices@oab.ca	www.oab.ca
Ontario Community Newspapers Association	(905) 639-8720		(905) 639-6962		www.ocna.org
Out of Home Marketing Association of Canada	(416) 968-3435		(416) 968-6538	nlowen@omaccanada.ca	www.omaccanada.ca
Print Measurement Bureau (PMB)	(416) 961-3205	1-800-762-0899	(416) 961-5052		www.pmb.ca
Quebec Community Newspapers Association	(514) 453-6300		(514) 453-6330	info@qcna.qc.ca	www.qcna.org
Radio Marketing Bureau	(416) 922-5757	1-800-667-2346	(416) 922-6542	info@rmb.ca	www.rmb.ca
Saskatchewan Weekly Newspapers Association	(306) 382-9683	1-800-661-7962	(306) 382-9421	info@swna.com	www.swna.com
Television Bureau of Canada	(416) 923-8813	1-800-231-0051	(416) 413-3879	tvb@tvb.ca	www.tvb.ca
Trans-Canada Advertising Agency Network (T-CAAN)	(416) 221-6984		(416) 221-8260	marketingmonkey @sympatico.ca	www.tcaan.ca
Western Association of Broadcasters		1-877-814-2719	1-877-814-2749	info@wab.ca	www.wab.ca

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Fax: (416) 966-3097
247canada.com

ACNIELSEN COMPANY OF CANADA
160 McNabb St.
Markham, ON L3R 4B8
Phone: (905) 475-3344
Fax: (905) 475-8357
nielsen.ca

ACNielsen provides measurement and analysis of marketplace dynamics and consumer attitudes and behavior.

ADTRAQ/CO HARRIS SOFTWARE SYSTEMS
25 Dyas Rd.
Toronto, ON M3B 1V7
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ADTRAQ/CO HARRIS SOFTWARE SYSTEMS LES SYSTEMS INFORMATIQUES HARRIS
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Montreal, QC H2Y 1Y3
Phone: (514) 824- 0101
Fax: (514) 824-0111

Adtraq provides a tracking system for media purchase administration.

BBM ANALYTICS
1500 Don Mills Road, 3rd Floor
Toronto, ON M3B 3L7

BBM Analytics is a leading provider of software that analyses TV and radio data from BBM Canada, with products including InfoSys+, Airware, microBBM and SalesPRO. BBM Analytics also offers insights on commercial tracking for TV and radio as well as consumer profile data in the form of the RTS survey.

COMB NAVIGATOR (COMB)
111 Peter Street, Suite 500
Toronto, ON M5V 2B8
Phone: (416) 968-3823
comb.org

Comb Navigator provides a reach and frequency planning tool for out-of-home media.

CORE DIRECT
695 Route 46 W., Suite 403
Fairfield, NJ 07004
Phone: (973) 276-0882
Fax: (973) 276- 0891
coremedia-systems.com

Core Direct provides syndicated software solutions for DRTV.

DONOVAN DATA SYSTEMS-DDS
2 St. Clair Ave W., Suite 1500
Toronto, ON M4V 1L5
Phone: (416) 929-3372
Fax: (416) 929-0779
ddscanada.com

Donovan provides an online information system tracking media buying processes and administration.

DOUBLECLICK (DART) –A DIVISION OF GOOGLE
111 Eighth Ave., 10th Floor
New York, NY 10011
Phone: (212) 271-2542
doubleclick.com

Doubleclick (DART) provides ad management and tracking for online advertising.

FUIMUS CORPORATION
Advertising Agency Management Systems
119-660 Eglinton Ave. East, Ste 349
Toronto, ON M4G 2K2
Phone & Fax: (416) 601-1744
Email: fuimus@fuimus.com
fuimus.com

Fuimus offers an advertising management software system (AAMS).

LEADING NATIONAL ADVERTISERS-LNA (DIVISION OF NIELSEN IMS)
20 Toronto Street, Suite 860
Toronto, ON M5C 2B8
Phone: (416) 644-3527
Fax: (416) 644-3530
inacan.com

LNA collects and classifies advertising expenditure information for the magazine and newspaper industries.

MARKETRON

5075 Yonge St., Suite 404
North York, ON M2N 6C6
Phone: (416) 221-9944
Fax: (416) 981-8766
Email: canadasupport@marketron.com
Marketron.com

Marketron offers TC software to track broadcast sales and inventory data.

MIJO

635 Queen St E
Toronto, ON M4M 1G4
Phone: (416) 964-7539
1-800-463-6456
Fax: (416) 778-9799
mijo.ca

Mijo provides a full range of broadcast, audio/visual, print and post-production services.

NIELSEN IMS (INTERACTIVE MARKET SYSTEMS)

20 Toronto Street, Suite 860
Toronto, ON M5C 2B8
Phone: (416) 961-2840
Fax: (416) 644-3530
Montréal
Phone: (514) 240-3012
nielsen.com/nielsenimscanada

Nielsen IMS provides a media planning and analysis software for both industry and proprietary research.

NIELSEN MEDIA RESEARCH CANADA

160 McNabb St.
Markham, ON L3R 4B8
Phone: (905) 475-9595
Fax: (905) 475-7296
nielsenmedia.ca

Nielsen Media Research is a provider of electronic television audience and media intelligence services in Canada.

TELMAR HMS

90 Eglinton Ave E., Suite 410
Toronto, ON M4P 2Y3
Phone: (416) 487-2111
Fax: (416) 487-2119
ca.telmar.com

Telmar provides a media planning system.

24/7 provides web analytics and search engine marketing software and solutions.

TNS MEDIA INTELLIGENCE/ EVALIANT

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Charlotte, NC 28269
Phone: (704) 598-7054/ (877) 598-7054
Fax: (704) 599-6250
Hotline: 800-497-8450

Evaliant is a provider of online advertising data, tracking ads on sites throughout North America.

SCALA CANADA (PREVIOUSLY MARKET INFORMATION SERVICES OF CANADA)

49 The Donway West, Suite 405
Toronto, ON M3C 3M9
Phone: (416) 391-7555
Fax: (416) 391-7579
Email: info@scala.com
Scala.com

Scala provides media campaign data for the outdoor advertising industry.

Media Terminology

GENERAL

ACCUMULATION Counting a person once who is exposed to a message only once over a specific time period (one week, four weeks, etc.). They are not counted each time they are exposed to the message.
ACHIEVEMENT Actualized delivery of audience, ratings, etc. of a media campaign, usually compared to planned/estimated objectives.
AIDED AWARENESS Per cent of an audience aware of a brand or advertising message once prompted with visual or aural cues.
AUDIENCE COMPOSITION Analysis of audience in terms of selected sub-groups based on demographics, lifestyle, etc., usually expressed as percentages.
BLOCKING CHART The graphic presentation on a calendar of planned advertising activity.
BRAND DEVELOPMENT INDEX (BDI) A market's propensity to use a specific brand, compared to the population in general; calculated by dividing the per cent of a product's total sales by the per cent of the total population in a specific market/region.
BUDGET CONTROL REPORT (BCR) Monthly, quarterly or annual document detailing actual versus projected expenditures to date.
BURST & BLACK A TV flighting method where an advertiser has several high weight flights, but is otherwise dark.
BUY REQUEST A form outlining specific requirements (target group, flight dates, etc.) of a broadcast campaign to be purchased.
CALL TO ACTION Copy that encourages the reader to respond and provides clear details on how (e.g. by mail, toll-free number, website or fax) and expiry date for response.
CONVERGENCE A multi-platform campaign employing many or all properties owned by one major media owner.
COST PER RATING (CPR) The cost of delivering a message to 1% of a pre-determined target group.
COST PER THOUSAND (CPM) Cost to deliver a message to 1,000 individuals. These individuals may be limited to those who meet specified demographic, psychographic or product consumption criteria.
CROSSTAB (X-TAB) Cross-referencing of data to identify habits/characteristics of a defined subset of the population.
CUMULATIVE AUDIENCE (CUME) Total unduplicated number of homes/individuals reached by a schedule of commercials/programs/ issues within a given time.
CUMULATIVE REACH Percentage of the target reached by a schedule in a given time period.
DECAY The decline in top-of-mind awareness as the result of a hiatus period, commercial wearout or competitive action.
DUPLICATION The extent to which two media vehicles have a common audience.
EFFECTIVE FREQUENCY Exposures to an advertising message required to achieve effective communication. Generally expressed as a range below which the exposure is inadequate and above which the exposure is considered wastage.
EFFECTIVE REACH Percentage of target reached at the stated "effective frequency" level.
EFFICIENCY Cost-effectiveness of a media buy based on CPMs/CPRs.
FLIGHTING Periodic waves of advertising, separated by periods of total inactivity (as opposed to continuous advertising).
FREQUENCY The number of times an advertising message has been exposed to a target audience.
FREQUENCY DISTRIBUTION Average frequency, broken down to indicate the percentage of the audience that has been exposed to the message once, twice, etc.
GROSS RATING POINTS (GRPS) The sum of all ratings delivered by a given schedule, against a pre-determined target group. GRPs = reach x frequency.
HEAVY-UP Increase in media weight for a short span of time.
HIATUS Period of time between advertising flights.
IMPRESSIONS/MESSAGES The total number of commercial occasions or advertisements scheduled, multiplied by the total target audience potentially exposed to each occasion. A media plan's impressions are usually referred to as gross impressions.
MARKET DEVELOPMENT INDEX (MDI) A market's propensity to use a product category; calculated by dividing the per cent of a product category's total sales by the per cent of the total population in a specific market/region.
OPTIMIZATION A process of adding media elements in order to achieve maximum results at each step.
POST-BUY ANALYSIS An analysis of actual media deliveries calculated after a specific spot or schedule of advertising has run.
PRE-BUY ANALYSIS A report of estimated deliveries of a broadcast media spot or schedule purchased.
PULSING A flighting technique that calls for either a continuous base of support, augmented by intermittent bursts of heavy weight, or an on-off, on-off pattern.
QUINTILES Grouping of survey results into equally sized groups, arranged by order of magnitude of activity. Each quintile represents one-fifth of the total population (quartiles by quarters, etc.).

REACH A measurement of the cumulative unduplicated target audience potentially exposed once or more to a particular program, station or publication in a given time frame. Reach is usually expressed as a percentage of the target population in a geographically defined area.
RECENCY A campaign's ability to reach its target audience as close as possible to the time of purchase, in order to maximize recent exposure to the message.
SHARE-OF-MARKET (SOM) A company's total sales volume expressed as a percentage of total category sales.
SHARE-OF-VOICE (SOV) A company's total advertising spend expressed as a percentage of total spending by the category.
SHORT RATE Charge incurred when an advertiser fails to meet the previously contracted volume of media time or space.
SPONSORSHIP Positioning an advertiser as a co-presenter of a specific program, publication or event.
STANDARD BROADCAST CALENDAR Division of a year into specified weeks commencing Mondays, and months comprised of stated full weeks only commencing the Monday of the week containing the first day of a calendar month. For costing/billing/scheduling purposes.
TALENT CYCLE A 13-week time period upon which residual payments to an advertisement's performers are based. Each time the advertising runs in a new talent cycle, an additional payment is required.
TEASER Advertisements preceding a major campaign that do not state the full commercial message, but are intended to build interest in a product/service prior to its launch.
TEST MARKET (TEST CELL) Process of conducting a small-scale promotion or introduction of goods in order to gather information useful in a broader promotion or product introduction.
TRAFFIC The person or department within an advertising agency responsible for the progress of creative through all stages of production and shipment of material to the media.
UNAIDED AWARENESS Percentage of target group aware of brand/advertising without prompting.
WASTE COVERAGE When media purchased reaches the wrong audience.
WEAR-OUT A level of frequency or point in time when an advertising message loses its ability to effectively communicate.
WEIGHTED AUDIENCE Audience to which adjustment factors have been applied. For example, a secondary target group may be discounted by 50% to reflect a lesser degree of importance.
WEIGHTED MEASURE Measure to which adjustment factors have been applied to one of the variables.

BROADCAST

ADJACENCY A commercial time slot immediately before or after a specific program.
AFFIDAVIT Written legal proof-of-performance from a radio or television station that a commercial ran at the time indicated.
AVAILABILITIES (OR AVAILS) Programs or time periods a station offers for sale.
AVERAGE MINUTE AUDIENCE/RATING The average number of persons, or per cent of a demographic, listening to a station during an average minute.
BACK-TO-BACK SCHEDULING Two or more commercials that are run one immediately following the other.
BILLBOARD Sponsoring announcement/identification at the beginning, end or in a break of a radio or television program.
BLANKET COVERAGE Refers to the complete coverage that a broadcast station has in a particular area.
BLOCK PROGRAMMING Programming of shows with a common demographic appeal, one after another.
BOOKEND Spots airing at the beginning and end of a commercial cluster.
BREAKFAST/DAY/DRIVE/EVENING In radio, basic dayparts sold. Time blocks are usually 6 a.m. to 10 a.m., 10 a.m. to 3 p.m., 3 p.m. to 7 p.m. and 7 p.m. to midnight, respectively.
CABLE SUBSTITUTION As regulated by the CRTC, any Canadian television station airing U.S. programming has to remove the U.S. advertisements and replace them with Canadian advertisements.
CENSUS AGGLOMERATION (CA) Geographical area, defined by Statistics Canada, with a population of 10,000 to 99,999.
CENSUS METROPOLITAN AREA (CMA) Geographical area, defined by Statistics Canada, with a population in excess of 100,000.
CENTRAL MARKET AREA (CMA) Geographical area, defined by BBM, usually centred around one urban centre.
CHURN Turnover in subscribers. Primarily refers to pay TV.
CLUSTER The set of different commercials within a commercial break, usually two to three minutes in total.
COMMUNITY ANTENNA TELEVISION (CATV) Antenna arrangement that receives distant signals and re-transmits via cable to subscribers.
COVERAGE Percentage of homes or individuals in a specific area that receive a broadcast and/or cable signal.
CRAWL An intrusive ad unit that literally crawls across the bottom of the viewing screen.
CUMULATIVE AUDIENCE (CUME)/PER CENT CUME The number of different people who tune, for at least one-quarter hour, to a station within a specified time block. Often expressed as a per cent.
CUT-IN Regional (or station) insertion of an alternative commercial replacing a spot carried nationally (or provincially) on a network.
DESIGNATED MARKET AREA (DMA) Geographical area comprised of a market and adjacent counties or census divisions, as defined by Nielsen Media Research.
DIRECT BROADCAST SATELLITE (DBS) Satellite that broadcasts directly to a subscriber's home dish antenna.
EXTENDED MARKET AREA (EMA) Geographical area comprised of a market and adjacent counties or census divisions, as defined by BBM.
FULL COVERAGE Audience that encompasses a station's total geographic reach.
GRID CARD Rate card that reflects audience delivery and demand at different times, resulting in a variety of rates for that program.
HOMES USING TELEVISION (HUT) Per cent of households with one or more sets tuned in at a given time.
HOURS TUNED Usually expressed as the average amount of time spent per person with a given station in a weekly period. It is an indication of the loyalty that an audience has to a station.

INTERSTITIAL Mini information segment, usually 30 or 60 seconds in length.
LEAD-IN/LEAD-OUT Programming leading into or out of a time block.
LOCAL PROGRAM Non-network program airing on a station.
MAKE-GOOD Commercial announcement offered to an advertiser as compensation for a pre-empted spot or one that ran incorrectly.
NARROWCASTING Programming designed to reach specific vertical targets. Often developed to appeal to special-interest or age groups.
NET (UNDUPLICATED) AUDIENCE Number of households or people reached by a particular broadcast schedule or program.
ONE TIME ONLY (OTO) A spot that is available only once.
PRE/POST RELEASE A pre-released program airs before the U.S. episode and post-release airs after.
PRIME/FRINGE/DAY In television, the basic dayparts sold. Prime runs 6 p.m.-11 p.m., fringe 4:30 p.m.- 6 p.m. and 11 p.m. until sign-off, and daytime sign-on until 4:30 p.m.
PROGRAM SUBSTITUTION Substitution, by the cable company, of one program for another on a given channel.
PERSONAL VIDEO RECORDER (PVR) A set-top box that stores video information in digital form.
QUARTER-HOUR AUDIENCE Same as Average Minute Audience but information is measured in 15-minute blocks. Viewers/listeners must tune in for five or more minutes to be counted.
RATING The average percentage of target group population within a defined geographic area tuned to a particular program at a specific time period.
ROADBLOCK Scheduling of commercial time, on all available stations, at a fixed time.
ROTATION Scheduling of a pool of commercials through a set schedule, on a rotating basis.
RUN OF SCHEDULE (ROS) Scheduling of a commercial in variable timeblocks, days or programs.
SETS-IN-USE (SIU) Total number of sets viewed at a specific time.
SHARE The percentage of the total television-viewing or radio-listening audience tuned to a particular program or station at a specific time, expressed as a per cent of average people viewing or listening during that time period.
SHARE OF AUDIENCE The percentage of all households watching a particular program. The household, rather than each person, is counted as a whole.
SIMULTANEOUS PROGRAM SUBSTITUTION Cable replacement of American identification and commercials with Canadian where the U.S. and Canadian stations are telecasting the same episode of a program at the same time.
SPILL-IN Broadcast signal from one market received in another.
SPLIT COMMERCIAL A commercial from the same advertiser devoting part of its time to one product, part to another, each being able to stand alone. Sometimes referred to as a "piggy-back" commercial.
SPOT TV Purchase of broadcast time on a station-by-station basis, i.e., non-network time. Sometimes referred to as Selective.
SQUEEZE-BACKS When an ad shares the television screen with a program's credits. Hence the credit's are "squeezed."
STRIP PROGRAMMING A program scheduled at the same time (usually during fringe or daytime) on successive days (usually Monday-Friday).
SUPERSTATION Station whose signal is available to cable systems across the country via satellite transmission.
TIERING Optional packages of pay-cable or basic cable services available to subscribers.

PRINT

ADNORM A term used by Starch Research to indicate readership averages by publication, by space size and colour, and by type of product. The norm is used to provide a standard of comparison for individual ads.
ADVERTORIAL Refers to a type of advertising that is placed in a print publication. The ad appears like an editorial article.
AGATE LINE A unit of space measurement, equal to one column wide and 1/14 inch deep.
ANNUALS Publications that are distributed once per year.
AUDIT REPORT The annual ABC Circulation Report, usually covering a 12-month period, details circulation by province, county/census divisions, cities, towns and villages.
BANNER Advertisement that runs horizontally on the bottom of a page of a publication.
BELLY BAND Ads that wrap around the paper. Consumers must remove the wrap before they can read the paper.
BLEED Printing to the edge of a page so there is no margin.
CENTRE SPREAD In the centre of a publication, an advertisement appearing on two facing pages printed as a single sheet.
CIRCULATION Average number of copies per issue sold or distributed.
CLOSING DATE The final deadline by which a publication will accept advertising space reservations/material.
CLUTTER The extent to which a publication's pages are fragmented into small blocks of advertising and/or editorial.
CONTROLLED CIRCULATION Publications distributed free, or mainly free, to individuals within a specific demographic segment, geographic area or job function.
COST RANK (CRANK) Ranking of publications by their coverage, cost per thousand, audience composition, etc., against a defined target group.
COVERAGE Percentage of individuals in a specific target group/geographic area reached by a publication/combination of publications.
DISPLAY ADVERTISING Advertisement that appears in any part of a publication other than the classifieds section.
EARLUG Space on either side of the masthead, or the top corners of the front page of a newspaper section, that is sold for advertising.
EARNED RATE Discounted advertising rate based on lineage/space committed.
FLEXFORM Advertisement not conforming to a standard shape.
FP4C A full-page, four-colour advertisement in a publication.
FREE-STANDING INSERT (FSI) A loose advertisement that is inserted into a newspaper.
GATEFOLD ADVERTISEMENT A continuous piece of paper folded to conform to a publication's page size. Often an extension of a magazine's cover.

GEOGRAPHIC SPLIT RUN Advertisements are created that have a specific message for a particular region, while the rest of the country receives one generic message.
GUTTER (TRUCK) Blank space on the inside page margins where a publication is bound or folded.
HALFTONE Reproduction made from an original photograph by transforming the different tones into a series of dots.
HOOKER (TAG) In newspaper advertising, local dealers' names appended to national advertising.
HORIZONTAL PUBLICATION A publication with editorial content of interest to a wide variety of readers.
IBC (INSIDE BACK COVER) Position of an advertisement on the inside back cover of a publication.
IFC (INSIDE FRONT COVER) Position of an advertisement on the inside front cover of a publication.
INCUMBENCY POSITION Premium positions in a specific issue for which right of first refusal is given to an advertiser who has historically held that position.
INFO PATCH Advertisement that is glued on the front of a newspaper. It unfolds to display the message.
ISLAND POSITION An advertisement in the centre of the page, surrounded by editorial.
JUNIOR PAGE Usually a 7-inch wide x 10-inch high ad in a tabloid or broadsheet format.
LETTERPRESS Printing done from cast metal type or plates on which the image or printing areas are raised.
MECHANICAL REQUIREMENTS Information and instructions regarding the physical aspects of preparing advertising material.
OBC (OUTSIDE BACK COVER) Position of an advertisement on the outside back cover of a publication.
OFF–REGISTER Blurred printing caused by out-of-position printing plates.
OFFSET PRINTING Process that prints by transferring ink from a cylinder to a rubber blanket, then to the printing surface.
OTC (OPPOSITE TABLE OF CONTENTS) Position of an advertisement on the page opposite the table of contents of a publication.
POSITION CHARGE The surcharge to ensure placement of an advertisement in a specific position in the publication.
RETAIL TRADING ZONE (RTZ) Area beyond and including the City Zone in which the residents regularly trade with the merchants located within the City Zone. Boundaries are defined by ABC.
RHP (RIGHT HAND PAGE) Position of an advertisement on a right-hand page of a publication.
ROP—RUN OF PAPER OR RUN OF PRESS Advertisements placed anywhere within the regular printed pages of a newspaper.
ROP COLOUR Process colour that is printed in a newspaper during the regular press run for that edition.
SATELLITE PAPER Publication whose typesetting signal is sent to distant printing facilities via satellite for regional or national distribution.
SPECIAL COLOUR A specific colour or tone not possible through regular four-colour process, e.g., fluorescent or metallic.
SPECTACOLOUR Pre-printed advertisement in roll-form that has two fixed dimensions: the width and depth of the newspaper page.
TABLOID PRINT Format of approximately 13 x 10 inches.
TAG-ONS Elastics that wrap around the paper with an advertisement brochure.
TEARSHEET Page of a publication supplied to agency/advertiser for checking purposes.
VERTICAL PUBLICATION Publications whose editorial content deals with interests of a specific industry.
VOLUME DISCOUNT A discount given by a publication based upon the number of times one advertises in it.
WRAP ADVERTISING A single advertiser's message printed on the front cover, IFC, OBC, and back cover of a publication.

OUT-OF-HOME

BACKLIT POSTER A luminous sign containing advertising graphics printed on translucent polyvinyl material.
BANNER Large format vinyl ad unit affixed to the side of a building.
ELECTROLUMINESCENT PAPER (EL) An OOH enhancement, where light pulses (built into the advertisement) can be utilized to highlight specific elements of an advertisement. The pulsing light can by synced to a rhythm or voice or motion activation.
FACE An individual, out-of-home advertising unit.
FLAGGING Peeling, ripping and other damage to out-of-home paper posters.
KING DISPLAYS Poster located on the exterior sides of a transit vehicle.
MINIBOARD Poster of dimensions of 13 x 17 inches presented in a stainless steel frame. Found in resto-bars, colleges and universities and health and fitness centres.
MOBILE SIGNAGE Moving billboards; truck side advertising using specialized and dedicated vehicles.
MURAL Advertisement painted on a wall.
SEVENTIES Poster located on the rear exterior of a transit vehicle.
SPECTACULAR A very large billboard ranging in sizes from 10 x 24 feet to 10 x 60 feet.
STALL ADVERTISING Advertisement on miniboard posted inside a washroom stall.
STATION DOMINATION A single advertiser blankets all the traditional media within a station.
SUPERBOARD A billboard that has extensions added onto it that extend further than the traditional size.
TALL WALL/VERTICAL POSTER A vertical billboard affixed to buildings.
TRI-VISION A mechanical advertising display with three or more separate faces that can be programmed to move in several ways at different time intervals.
VIDEO DISPLAYS LED screens offering TV-quality displays that are positioned at outdoor locations.
WRAP Advertisement painted on the entire exterior surface of a vehicle.

DIRECT MARKETING

ABANDONMENT As in the phrase "call abandonment." This refers to people who, being placed on hold in an incoming call, elect to hang up ("abandon") the call. Call centres monitor closely the "abandonment rate" as a measure of their inefficiency.

ACD AUTOMATIC CALL DISTRIBUTOR A machine used in modern call centres for incoming calls. It routes calls to available agents, holds overflow calls, gives and takes messages, provides reports.
ACQUISITION COST The cost of signing up a new customer. **LIFETIME VALUE** is often used to compute the maximum allowable acquisition cost.
AFFINITY ANALYSIS A process of finding relationships between customer purchases, e.g. people who buy skis also buy snow tires.
AFFINITY MATRIX A cross tab showing cross-buying patterns by customers who did or did not buy products A, B, C and D.
ATTRITION MODEL A model that predicts which customers are most likely to leave. Usually expressed as a percentage of likelihood.
BACK END The measurement of a buyer's performance after he has ordered the first item in a series offering. Sometimes used to refer to the activities necessary to complete a mail-order transaction once an order has been received.
C.P.I. COST PER INQUIRY A simple arithmetical formula derived by dividing the total cost of a mailing or an advertisement by the number of inquiries received.
C.P.C. Cost per Call.
C.P.O. COST PER ORDER As with C.P.I., except based on actual orders rather than inquiries.
CHURNING The practice of customers switching to another supplier based on special discount offers. Used particularly in the cellular telephone or credit card industries.
COMPUTATION PERIOD The number of years from now that you can safely project customer lifetime value. The period is short for products that soon become obsolete.
CONVERSION RATE The percentage of responders who become customers.
DATABASE MARKETING The systematic collection and manipulation of data to achieve marketing goals. Databases can include customers, prospects and dealers/distributors.
DE-DUPE Identifying and consolidating duplicate names; usually done in a merge/purge operation.
F.S.A. FORWARD SORTATION AREA The alphanumeric, three-digit prefix of Canadian postal codes. Used widely in list selection due to its precision and demographic indicators.
FRONT END Refers to the initial level of response from the target audience, especially where two-step selling is used.
GEOCODING The process of appending latitude and longitude coordinates to a database record so it can be properly placed on a geographical map.
HOUSE LIST Direct marketer's own list of customers, inquiries and hot prospects, past and current.
IN-BOUND A telephone sales term relating to a program reliant on buyers "phoning in" as a result of other media, e.g. mail, space, TV or radio.
INFOMERCIAL Long form of DRTV, usually 30 minutes, but can be 60 minutes with broadcaster permission. Sometimes referred to as edumercials. Asks viewers to respond, usually by placing an order for product, service or information.
LIST BROKER A specialist who makes all necessary arrangements for one company to use the list(s) of another company. A broker's services may include most, or all, of the following: research, selection, recommendation and subsequent evaluation.
LIST MANAGERS Data-processing firms and related businesses that house list maintenance facilities capable of adding, deleting, outputting and analyzing lists and responses.
MODELING A statistical technique that determines which pieces of data in a customer database explains the customer's behaviour. The output of a model is a series of weights that can be multiplied by customer data (e.g. income, age, length of residence) to create a score that predicts likelihood to respond to an offer.
N.D.G. NATIONAL DISTRIBUTION GUIDE The instruction manual released by Canada Post outlining rules and schema for using the postal service for commercial mailings. "N.D.G." is an acronym for a mailing list properly sorted to obtain bulk postage rates.
OUT-BOUND Telephone sales originated by the selling party calling the buyer (popularly known as telemarketing).
PENETRATION RATIO Customers as a percentage of the universe defining a customer's type of household or business.
R.F.M. RECENCY, FREQUENCY, MONETARY VALUE. The three factors reviewed in evaluating a past buyer's profile.
SELF-MAILER A common mail package built from one piece of paper stock that does not require an envelope but does provide a response device within its folds.
SHORT FORM DRTV 60- or 120-second television commercials that include a request for the viewer to place an order for product, service or information.
S.I.C. STANDARD INDUSTRIAL CLASSIFICATION CODE A three- and four-digit code used to classify businesses by vocation.
WOE (**WINDOW ENVELOPE**) A mailing envelope with a transparent panel for the address.
W.A.T.S. LINE WIDE AREA TELEPHONE SERVICES LINE Discounted long-distance lines offered by the phone companies to bulk users.

INTERNET

ABOVE THE FOLD Part of an email message or web page that is visible without scrolling.
AD ACTIVITY User interaction with an ad unit not necessarily resulting in a click-through.
AD IMPRESSION Ad that is served to a user's browser. Ads can be requested by the user's browser (referred to as pulled ads) or they can be pushed, such as e-mailed ads.
AD REQUEST Request for an advertisement as a direct result of a user's action, as recorded by the ad server.
AD SERVING Delivery of ads by a server to an end user's computer on which the ads are then displayed by a browser and/or cached.
AD STREAM Series of ads displayed by the user during a single visit to a site (also impression stream).
ADVERTISING NETWORK Online aggregator or broker of advertising inventory for many sites.
AUGMENTED REALITY 3D enhancement of an advertisement via specific computer software, the trigger of which is built into a

traditional advertisement and then activated by proximity to a computer or cell phone

AUTO BIDDING Opposite of Fixed Bidding in paid search campaigns in which an advertiser sets a maximum bid for a specific keyword, but may pay less for each clickthrough of that keyword.

BANDWIDTH The transmission rate of a communications line or system.

BANNER A horizontal, graphic advertising image displayed on a web page.

BEHAVIORAL TARGETING Displaying ads to users based on their past browsing behavior within an ad network.

BID (KEYWORD BID) Maximum amount of money that an advertiser is willing to pay each time a web searcher clicks on an ad.

BIG BOX One of three standard creative ad units: 300 x 250 pixels. (See also Leaderboard and Skyscraper)

BUTTON Clickable graphic, potentially an advertisement, that contains certain functionality, such as taking one to another site or executing a program.

CACHE Memory used to temporarily store the most frequently requested online content/files/pages in order to speed its delivery to the user.

CAPPING To voluntarily prevent ads from repeatedly displaying, often referred as frequency capping.

CLICK-THROUGH RATE (CTR) The rate (expressed as a percentage) at which users click on an ad. This is calculated by dividing the total number of clicks by the total number of ad impressions.

CONTENT INTEGRATION Advertising woven into online editorial content or placed in a contextual envelope. Also known as "Web advertorial."

CONTENT NETWORK Group of websites that agree to show ads on their sites, collectively served by a 3rd party ad network, in exchange for a share of the revenue generated by those ads.

CONTEXTUAL ADVERTISING Advertising that is targeted to a non-search web page based on the page's content, keywords or category.

COOKIE A very small text file (i.e., program code) that is stored on a user's browser for the purpose of uniquely identifying that browser.

CPA (COST-PER-ACTION) Performance-based advertising model where payment is dependent upon an action that a user performs as a result of the ad.

CPC (COST-PER-CLICK) Cost of advertising based on the number of clicks received.

CPL (COST-PER-LEAD) Performance-based advertising model where the cost of advertising is determined based on the number of database files (leads) received.

DYNAMIC AD INSERTION Process by which an online ad is inserted into a web page in response to a user's request. Allows for multiple ads to be rotated through one or more spaces or placed based on demographic data or usage history for the current user.

EXPANDABLE BANNERS Banner ads that can expand beyond the confines of the traditional banner, to reveal more advertising information triggered by a click, roll-over or auto-initiation.

FIXED BIDDING Keyword bidding in paid search campaigns wherein payment exactly matches the original bid for each click-through.

FLOATING ADS Online ad or ads that appear within the main browser window, on top of the web page's normal content, thereby appearing to "float" over the top of the page.

GEO-TARGETING Geo-targeting allows advertisers to specify where ads will or will not be shown based on user location.

HYBRID PRICING Pricing model based on a combination of a CPM pricing model and a performance-based pricing model.

HYPERLINK HTML programming that redirects the user to a new URL when the individual clicks on hypertext.

INTERSTITIAL ADS Ads that appear between two content pages. Also known as transition ads, intermercial ads, splash pages and Flash pages.

JUMP PAGE AD Microsite that is reached via click-through from a button or banner ad.

LANDING PAGE Web page viewed after clicking on a link within an email or an ad. Also may be called a microsite, splash page, bounce page or click page.

LEADERBOARD One of three standard creative ad units – horizontal format: 728 x 90 pixels. (See also Big Box and Skyscraper)

MICROSITES Multi-page ads accessed via click-through from initial ad. User stays on the publisher's web site, but has access to more information from the advertiser than a standard ad format allows.

MINIMUM BID The lowest amount of money that a pay-per-click search engine allows advertisers to bid for a certain keyword.

MOUSE-OVER The process by which a user places his/her mouse over a media object, without clicking. The mouse may need to remain still for a specified amount of time to initiate some actions like an expanding ad.

ORGANIC SEARCH RESULTS Unpaid search engine listings, as distinct from paid search engine placements or pay per click ads.

PAGE REQUEST The opportunity for an HTML document to appear on a browser window as a direct result of a user's interaction with a web site.

PAY-PER-CLICK Also called Cost-per-Click. A performance-based online advertising pricing model in which advertisers pay according to the number of visitors that click on an online ad as opposed to payment based on exposure (CPM model).

PAY PER CLICK SEARCH ENGINE (PPCSE) A type of search engine in which search results are determined by advertiser bids. Generally speaking, the advertiser that bids the highest amount on a specific keyword will appear as the No. 1 search result for that specific keyword.

PAY-PER-LEAD A performance-based advertising pricing model in which advertisers pay for each "sales lead" generated.

PAY-PER-SALE A performance-based advertising pricing model in which advertisers pay based on how many sales transactions were generated as a direct result of the ad.

PIXEL PICTURE Element (single illuminated dot) on a computer monitor. The metric used to indicate the size of Internet ads.

POP-UNDER AD Ad that appears in a separate window beneath an open window. Pop-under ads are concealed until the top window is closed, moved, resized or minimized.

POP-UP AD Online ad that appears in a separate window on top of content already on-screen.
POP-UP TRANSITIONAL Initiates play in a separate ad window during the transition between content pages.
POST-CLICK Actions performed by a user on an advertiser site after being redirected there from clicking an ad.
POST-ROLL Form of online video ad placement where the advertisement is played after the content video plays.
PRE-ROLL Form of online video ad placement where the advertisement is played before the content video plays.
QUALITY SCORE A score assigned by search engines that is calculated by measuring an ad's click-through rate, analyzing the relevance of the landing page, and other factors like historical keyword performance, to determine the quality of a site, rewarding those of higher quality with top placement and lower bid requirements.
PUSHDOWN An ad unit that literally "pushes" down the content to reveal a rich media advertisement.
QUERY An online request for information, usually to a search engine.
RE-DIRECT One server assigning an ad-serving or ad-targeting function to another server, often operated by a third company.
RON (RUN-OF-NETWORK) Scheduling of Internet advertising whereby an ad network positions ads across the sites it represents at its own discretion, according to available inventory.
ROS (RUN-OF-SITE) Scheduling of Internet advertising whereby ads run across an entire site, often at a lower cost to the advertiser than the purchase of specific site sub-sections.
SESSION Also called a "visit." A single, continuous set of activity attributable to a cookied browser or user resulting in one or more pulled text and/or graphics downloads from a site.
SESSION COOKIES Cookies that are loaded into a computer's RAM, and only work during that browser session.
SKYSCRAPER One of three standard creative ad units–vertical format: 160 x 600 pixels. (See also Big Box and Leaderboard)
SPLASH PAGE A preliminary page that precedes the user-requested page of a website; usually promotes a particular site feature or provides advertising.
TEXTUAL AD IMPRESSIONS The delivery of a text-based advertisement to a browser. To compensate for slow Internet connections, visitors may disable "auto load images" in their graphical browser. When they arrive at a page that contains an advertisement, they see a marker and the advertiser's message in text format in place of the graphical ad.
THIRD-PARTY AD SERVER Independent, outsourced companies that specialize in managing, maintaining, serving, tracking and analyzing the results of online ad campaigns. Total visits should filter robotic activity, but can include visits.
UNIQUE COOKIE A count of unique identifiers that represents unduplicated instances of Internet activity (generally visits) to Internet content or advertising during a measurement period.
UNIQUE DEVICE An unduplicated computing device that is used to access Internet content or advertising during a measurement period.
USER CENTRIC MEASUREMENT Web audience measurement based on the behavior of a sample (panel) of web users.
VIRAL MARKETING Advertising and/or marketing techniques that "spread" like a virus by getting passed on from consumer to consumer and market to market.
WEB 2.0 A term that refers to a supposed second generation of Internet-based services on the World Wide Web, especially the movement away from static Web pages.
WIDGET The key difference between a widget and a web application is portability. Widgets are applications that can function on any site that accepts external content, including social networks, blog platforms, start pages (i.e. MyYahoo), desktop platforms or personal web pages.
WIKI A collection of web pages designed to enable anyone with access to contribute or modify content, using a simplified markup language.

MOBILE

ANALOG The "traditional" method of telecommunications, a transmission method employing a continuous (rather than pulse or digital) electrical signal.
CELL Physical area in which coverage is provided.
DIGITAL Describes a method of storing, processing and transmitting information through the use of distinct electronic or optical pulses that represent the binary digits 0 and 1.
IVR (INTERACTIVE VOICE RECORDINGS) Used for marketing executions. Limited use in Canada.
MOBILE COVERAGE The geographic area in which a given service provider provides connectivity using a given wireless protocol. Mobile coverage may be provided in one of two ways–either as an on-net service using the network managed by the service provider, or as a roaming service using a network managed by another service provider.
MOBILE VIRTUAL NETWORK OPERATOR (MVNO) A mobile service provider that establishes arrangements with existing mobile service operator(s) to resell pre-packaged or repacked mobile wireless service plans. The MVNO handles its own customer care, billing, marketing and branding.
QR/QR CODE A mobile coupon. It allows a merchant to "track" redemptions and overall uptake.
SMART PHONE A mobile phone offering complete operating system software providing a standardized interface and platform for application developers and featuring e-mail, Internet and ebook reader capabilities, with a built-in, full keyboard. Advanced 3G devices are equipped with more powerful processors, abundant memory and large screens.
SMS (SHORT MESSAGING SERVICE) A wireless messaging service that permits the transmission of a short text message from and/or to a digital mobile telephone terminal.
VOIP (VOICE OVER INTERNET PROTOCOL) A service or capability utilizing both hardware and software that enables users to employ IP networks, such as the Internet, as the transmission medium for voice communication.
WAP (WIRELESS APPLICATION PROTOCOL) A transaction-oriented specification for sending and receiving information, content and service-specific data over wireless networks.
WAP DEVICE Any device (e.g., mobile phone, PDA or simulator) that allows access to wireless content.
WIRELESS A device or system that performs one or more telecommunications applications without using wires to communicate between nodes, usually by relying on radio frequencies instead.

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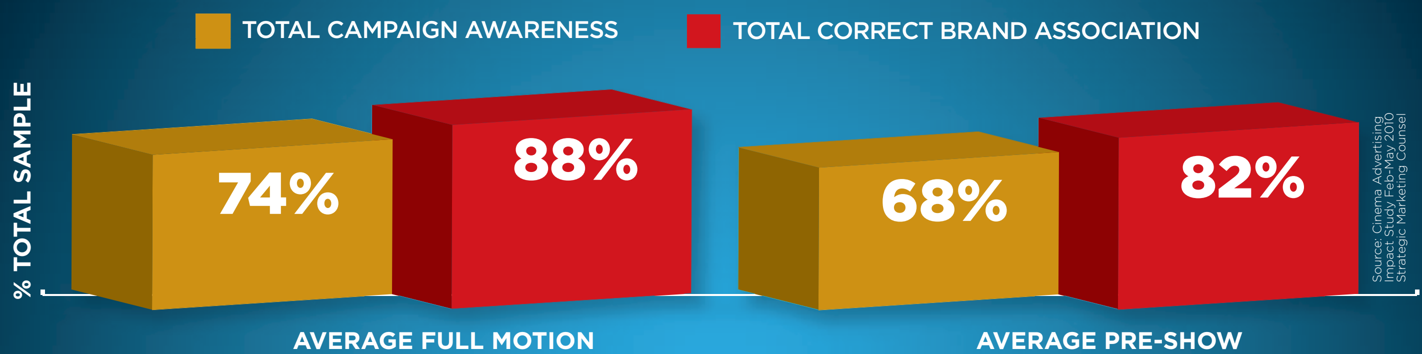

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