

Canadian Media Directors' Council

MEDIA DIGEST

09 | 10

Letter from the President Canadian Media Directors' Council

Welcome readers,

The Canadian Media Directors' Council is delighted to provide you with the 2009/2010 edition of the Media Digest. There has never been a more exciting time to be in the marketing communications business, and the Media Digest continues to be the sole comprehensive source of key trends and details on the full media landscape in the Canadian marketplace.

The Media Digest is contributed to by all of the CMDC agencies, whose members play an instrumental role in updating and reinventing the Digest content on a yearly basis. This 2009/2010 edition was chaired by Fred Forster, president & CEO of PHD Canada and compiled and produced by Margaret Rye, CMDC Digest administrator. Our special thanks to Fred and Margaret for their coordination and stewardship of all of the Digest components and working collaboratively with all of the contributors.

The CMDC has had a long partnership on the Media Digest with our publishing partner *Marketing* magazine. We value their commitment and continued support in recognizing the importance of providing a consolidated reference tool to the industry, as we go through unprecedented change. Our particular thanks to our partner editorial team at Marketing and their sales staff.

We must also thank our advertisers; it is with their continuing support we are able to fund and publish the Digest on an annual basis.

The Media Digest has been informing and advising the Canadian industry for more than 30 years. As our industry is transforming, we are pleased to be able to make the Media Digest and its valuable and unique reference information freely accessible to the industry in both hard copy and online at www.cmdc.ca and www.marketingmag.ca.

The Media Digest is an important element of the CMDC's mission to further the advancement of media and communications in Canada and we welcome the positive response we receive from readers who make good use of its valuable content.

Anne Myers
President, CMDC



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.

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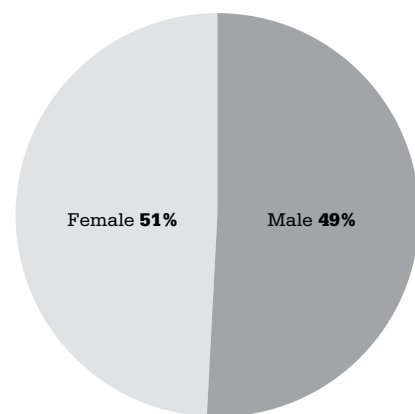
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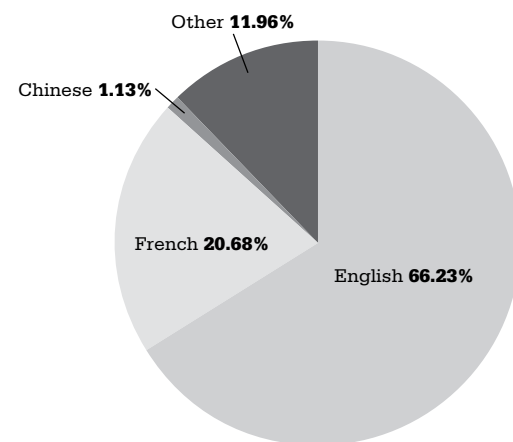
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Canadian Market Data

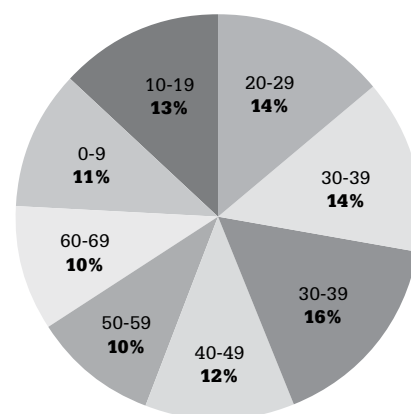
% Population by Sex



Home Language (All of Canada)



Total % Population by Age



Source: FPMarkets - Canadian Demographics 2009

Markets with Populations of 100,000 and Over

Markets	2008 Est. Pop. (000)	HOUSEHOLDS			RETAIL SALES			Market Rating Index
		2008 % Canada	% Change '06-'08	Total HH at July 1 (000)	Retail \$ Millions	% Canada	\$ Per Capita	
Toronto, CMA	5,772.0	15.53	8.80	2,045.1	62,255.8	14.78	10,800	87
Montreal, CMA	3,868.8	12.10	4.78	1,635.2	44,481.4	10.56	11,500	93
Vancouver, CMA	2,306.0	6.69	6.00	905.0	27,767.5	6.59	12,000	97
Ottawa-Gatineau, CMA	1,215.4	3.62	5.23	489.8	13,403.8	3.18	11,000	89
Calgary, CMA	1,221.6	3.53	11.77	477.3	21,775.7	5.17	17,800	144
Edmonton, CMA	1,144.4	3.36	9.27	454.8	20,451.6	4.86	17,900	145
Hamilton, CMA	740.8	2.13	3.83	287.7	7,836.7	1.86	10,600	86
Quebec City, CMA	751.1	2.48	3.63	335.3	9,465.6	2.25	12,600	102
Winnipeg, CMA	722.1	2.19	1.99	295.4	8,057.0	1.91	11,200	90
London, CMA	490.8	1.49	4.14	201.5	6,076.7	1.44	12,400	100
Kitchener, CMA	499.5	1.41	8.13	190.3	5,687.5	1.35	11,400	92
St. Catharines-Niagara, CMA	412.7	1.23	2.68	166.8	4,789.4	1.14	11,600	94
Halifax, CMA	389.9	1.22	3.72	165.4	4,860.8	1.15	12,500	101
Oshawa, CMA	382.8	1.04	13.05	139.9	4,093.9	0.97	10,700	87
Windsor, CMA	347.9	1.01	4.38	136.8	3,699.0	0.88	10,600	86
Victoria, CMA	357.2	1.17	4.21	158.0	4,059.7	0.96	11,400	92
Saskatoon, CMA	244.3	0.75	4.08	101.2	3,332.6	0.79	13,600	110
Regina, CMA	200.4	0.62	2.24	83.8	2,705.2	0.64	13,500	109
Barrie, CMA	219.9	0.59	20.88	80.2	2,572.6	0.61	11,700	95
St. John's, CMA	191.1	0.56	4.90	75.5	2,804.8	0.67	14,700	119
Abbotsford, CMA	174.0	0.46	5.74	61.7	2,409.7	0.57	13,800	112
Kelowna, CMA	180.2	0.55	7.46	75.0	2,516.8	0.60	14,000	113
Sherbrooke, CMA	198.2	0.66	5.01	88.7	2,728.2	0.65	13,800	111
Greater Sudbury, CMA	165.6	0.51	2.06	68.9	2,320.2	0.55	14,000	113
Kingston, CMA	162.0	0.50	3.98	67.0	2,070.8	0.49	12,800	103
Saguenay, CMA	152.1	0.49	0.17	65.7	2,153.7	0.51	14,200	115
Trois Rivières, CMA	146.2	0.49	2.47	66.7	1,998.1	0.47	13,700	111
Brantford, CMA	140.3	0.40	4.10	54.2	1,441.5	0.34	10,300	83
Guelph, CMA	139.4	0.41	8.71	55.1	1,411.8	0.34	10,100	82
Moncton, CMA	137.0	0.42	5.98	56.2	2,135.4	0.51	15,600	126
Thunder Bay, CMA	128.0	0.40	1.37	54.3	1,892.5	0.45	14,800	120
Saint John, CMA	125.1	0.38	0.53	50.8	1,302.7	0.31	10,400	84
Peterborough, CMA	124.4	0.37	4.10	50.4	1,529.2	0.36	12,300	99
Chatham-Kent, CA	112.8	0.34	0.68	45.7	1,810.0	0.43	16,000	130
Cape Breton, CA	106.0	0.32	-1.45	43.6	1,299.4	0.31	12,300	99
Lethbridge, CA	103.9	0.30	7.24	40.9	2,093.4	0.50	20,200	163
Red Deer, CA	103.5	0.30	22.96	41.2	2,311.1	0.55	22,300	181
Nanaimo, CA	100.7	0.32	6.14	42.9	1,707.6	0.41	17,000	137

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	514.8	514.3	1.51	0.09	204.3	1.51	6,459.6	1.53	31,600	102
Prince Edward Island	137.5	137.2	0.40	0.23	54.1	0.40	1,583.1	0.38	29,200	93
Nova Scotia	936.4	938.2	2.75	-0.19	391.9	2.90	11,331.8	2.69	28,900	98
New Brunswick	752.7	750.4	2.21	0.31	308.9	2.29	9,126.3	2.17	29,500	98
Quebec	7,960.3	7,717.3	23.35	3.15	3,393.3	25.10	91,002.2	21.61	26,800	93
Ontario	13,364.6	12,688.0	39.20	5.33	5,044.9	37.32	151,567.0	35.99	30,000	92
Manitoba	1,199.6	1,180.9	3.52	1.59	469.7	3.47	13,794.5	3.28	29,400	93
Saskatchewan	991.6	989.7	2.91	0.2	397.0	2.94	12,587.2	2.99	31,700	103
Alberta	3,671.7	3,382.9	10.77	8.54	1,415.5	10.47	65,159.3	15.47	46,000	144
British Columbia	4,448.1	4,293.9	13.05	3.59	1,798.6	13.30	56,986.8	13.53	31,700	104
Northwest Territories	49.8	45.3	0.15	9.79	17.5	0.13	737.8	0.18	42,100	120
Nunavut	34.2	31.0	0.10	10.33	9.5	0.07	298.7	0.07	31,500	71
Yukon Territory	33.2	32.0	0.10	3.97	14.0	0.10	510.4	0.12	36,400	124
Canada	34,094.6	32,700.9	100.00	4.26	13,519.4	100.0	421,144.6	100.0	31,200	100

Source: FPMarkets - Canadian Demographics 2009

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	98.12	95.97	96.89	67.85	96.36	0.49	16.33	59.52	1.03	4.41	0.50	95.10	88.87	87.43	94.41	86.17
French	0.17	1.01	0.22	30.45	1.58	98.83	68.37	29.26	97.11	92.13	98.14	0.70	0.58	0.42	1.36	0.36
Amharic	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0.06
Arabic	0.11	0.56	-	-	-	0.10	1.43	1.52	0.10	0.16	0.10	-	0.19	0.70	0.14	0.50
Armenian	-	-	-	-	-	-	0.32	-	-	-	-	-	-	-	-	0.06
Bengali	0.07	-	-	-	-	-	0.21	0.15	-	-	-	-	0.10	0.09	-	-
Bosnian	-	-	-	-	-	-	-	-	0.12	-	-	-	-	0.13	-	0.09
Bulgarian	-	-	-	-	-	-	0.10	0.05	-	-	-	-	-	-	-	-
Cantonese	0.08	-	-	-	0.08	-	0.21	0.33	-	-	-	0.10	0.34	0.19	0.19	0.21
Chinese, n.i.e *	0.27	0.26	0.17	0.08	0.47	-	0.98	0.99	0.05	0.11	-	0.16	0.95	0.61	0.50	0.85
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	-	-	-	-	-	0.10	0.07	0.06	0.18
Hebrew	-	-	-	-	-	-	0.05	-	-	-	-	-	-	-	-	-
Hindi	-	-	-	-	-	-	-	0.09	-	-	-	-	0.10	0.08	-	0.14
Hungarian	-	-	-	-	-	-	0.06	0.06	-	-	-	0.07	0.64	0.22	-	0.11
Italian	-	-	-	0.09	-	-	1.33	0.33	-	-	-	0.22	0.74	1.09	0.07	0.13
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	0.26
Kurdish	-	-	-	-	-	-	-	-	-	-	-	-	-	0.06	-	-
Lao	-	-	-	-	-	-	0.07	-	-	-	-	-	0.08	-	-	0.16
Macedonian	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0.06
Mandarin	0.09	0.09	-	-	0.14	-	0.16	0.35	-	-	-	0.08	0.27	0.21	0.19	-
Micmac	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Mi'kmag	-	-	2.00	-	-	-	-	-	-	-	-	-	-	-	-	-
Montagnais-Naskapi	-	-	-	-	-	-	0.05	-	-	-	-	-	-	-	-	-
Panjabi (Punjabi)	-	-	-	-	-	-	0.23	0.16	-	-	-	0.08	0.55	0.69	0.07	0.57
Pashto	-	-	-	-	-	-	-	-	-	-	-	-	0.11	-	-	0.11
Persian (Farsi)	0.12	0.12	-	-	0.18	-	0.25	0.35	-	0.31	-	0.10	0.35	0.24	0.09	0.48
Polish	-	0.17	0.07	-	-	-	0.18	0.23	-	-	-	0.57	0.67	0.81	0.10	0.67
Portuguese	-	-	-	-	-	-	0.36	0.28	0.05	-	-	0.13	0.09	0.60	0.54	1.17
Romanian	-	-	-	0.05	-	-	0.51	0.17	0.08	-	-	-	0.12	0.20	-	0.60
Russian	0.07	0.06	-	-	0.08	-	0.38	0.32	-	-	-	0.14	0.13	0.16	0.07	0.18
Serbian	-	-	-	-	-	-	-	0.11	-	0.18	-	-	0.27	0.55	-	0.75
Serbo-Croatian	-	-	-	-	-	-	-	0.08	-	0.18	-	-	-	-	-	0.07
Slovak	-	-	-	-	-	-	-	-	-	-	-	0.06	-	0.07	-	-
Somali	-	-	-	-	-	-	-	0.35	-	-	-	-	-	0.07	-	0.06
Spanish	0.30	0.11	-	-	0.13	0.13	1.60	0.61	0.37	0.86	0.31	0.40	0.57	0.60	0.29	0.81
Tagalog (Pilipino, Filipino)	-	-	-	-	-	-	0.17	0.15	-	-	-	0.09	0.32	0.18	0.06	0.11
Tamil	-	-	-	-	-	-	0.28	0.13	-	-	-	0.05	0.15	-	-	0.06
Turkish	-	-	-	-	-	-	0.11	0.08	-	-	-	-	-	0.09	-	0.09
Ukrainian	-	-	-	-	-	-	-	-	-	-	-	-	-	0.17	0.09	-
Urdu	0.09	0.06	0.10	-	-	-	0.19	0.22	-	0.05	-	0.21	0.17	0.32	0.09	0.32
Vietnamese	-	0.08	0.08	-	-	-	0.52	0.46	0.08	0.08	0.08	0.15	0.77	0.39	0.14	0.58
Yiddish	-	-	-	-	-	-	0.13	-	-	-	-	-	-	-	-	-
Multiple Responses	0.21	0.54	0.21	0.98	0.42	0.28	3.22	2.41	0.56	1.0	0.47	0.80	1.57	1.70	0.77	1.65
Other	0.51	0.59	0.18	0.44	0.40	0.17	0.65	0.87	0.46	0.52	0.33	0.50	0.79	0.80	0.45	0.69

Source: FPmarkets – Canadian Demographics 2009

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	94.20	97.38	91.41	80.21	94.95	69.01	84.96	87.66	95.56	95.29	84.91	88.27	95.03	81.32	70.52	93.95
French	0.39	0.85	0.30	1.24	16.31	0.89	0.48	0.92	1.84	0.52	0.32	0.44	0.70	0.37	0.27	0.38	0.46
Akan (Twi)	-	-	-	-	-	-	0.11	-	-	-	-	-	-	-	-	-	-
Amharic	-	-	-	-	-	-	0.05	-	0.12	-	-	0.11	0.05	-	-	-	-
Arabic	1.04	0.11	0.05	0.26	-	-	0.62	2.01	0.17	0.21	0.26	0.46	0.41	-	-	0.18	-
Armenian	-	-	-	-	-	-	0.15	0.06	-	-	-	-	-	-	-	-	-
Bengali	-	-	-	-	-	-	0.34	0.09	-	-	-	0.12	-	-	-	-	-
Bosnian	0.08	-	-	-	-	-	-	0.06	-	-	-	0.05	-	-	-	-	-
Bulgarian	-	-	-	0.07	-	-	0.09	-	-	-	-	0.05	-	-	-	-	-
Cantonese	0.19	0.15	0.08	0.11	-	0.05	2.95	0.24	0.28	0.17	0.18	1.29	0.98	0.09	0.18	4.94	0.55
Chinese, n.i.e	0.49	0.23	0.11	0.35	0.13	0.18	2.60	1.11	0.58	0.56	0.64	1.79	1.42	0.21	0.40	4.35	0.89
Cree	-	-	-	-	-	-	-	-	-	-	0.14	-	-	-	-	-	-
Creole	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Croatian	0.09	-	-	0.14	0.07	0.07	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	0.55	-	-	-	-	-	-	-	0.17	-	-	0.06
German	0.19	-	0.08	0.38	-	0.05	0.09	0.15	0.55	0.18	0.38	0.12	0.22	0.79	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	-	0.10	0.07	-	-	-	0.72	0.19	0.06	-	-	0.20	0.12	-	-	0.13	-
Hebrew	-	-	-	-	-	-	0.11	-	-	-	-	-	-	-	-	-	-
Hindi	0.09	-	-	-	-	-	0.39	0.12	0.07	-	0.07	0.18	0.26	0.07	0.09	0.54	-
Hungarian	0.12	0.10	-	0.16	-	-	0.13	0.17	-	-	-	0.08	-	0.21	0.08	0.09	-
Ilocano	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0.05	-
Italian	0.26	0.35	0.15	1.24	0.81	1.12	1.45	1.16	0.21	-	-	0.12	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	-	-	0.05	-	-	-	0.09	-	-	-	-	-	-	-	-	-
Korean	0.32	0.09	0.17	0.17	-	-	0.75	0.13	0.22	0.09	-	0.48	0.24	0.10	0.90	1.76	0.24
Kurdish	0.10	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Lao	-	-	-	0.11	-	-	-	-	0.08	-	-	-	-	-	0.06	-	-
Macedonian	-	0.07	-	-	-	-	0.12	0.23	-	-	-	-	-	-	-	-	-
Malay	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0.06	-
Malayalam	-	-	-	-	-	-	0.06	-	-	-	-	-	-	-	-	-	-
Mandarin	0.15	0.06	0.13	0.07	-	-	1.02	0.18	0.15	0.15	0.06	0.59	0.27	-	0.18	2.86	0.32
Micmac	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Montagnais-Naskapi	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Ojibway	-	-	-	-	-	-	0.10	-	-	-	0.06	-	-	-	-	-	-
Oji-Cree	-	-	-	-	-	-	0.09	-	-	-	-	-	-	-	-	-	-
Panjabi (Punjabi)	0.09	-	-	0.06	-	-	2.23	0.63	0.68	0.19	0.08	1.54	1.02	0.65	12.05	4.32	0.68
Pashto	-	-	-	-	-	-	0.06	-	-	-	-	-	-	-	-	-	-
Persian (Farsi)	0.21	0.24	-	-	-	-	0.94	0.12	0.14	0.10	0.12	0.31	0.17	-	0.05	0.89	0.09
Polish	0.88	0.50	0.28	0.41	0.14	0.37	0.85	0.57	0.46	0.06	0.07	0.34	0.40	0.19	0.07	0.26	0.16
Portuguese	0.74	0.19	-	-	0.05	0.10	1.06	0.10	0.39	-	-	0.09	0.15	0.06	-	0.14	0.14
Romanian	0.09	0.10	-	-	-	-	0.28	0.47	-	-	-	0.14	0.07	-	0.10	0.14	-
Russian	0.18	0.08	-	0.13	-	-	1										

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

Home Language	Brantford	Lethbridge	Red Deer	Nanaimo
English	94.31	94.66	95.24	95.24
French	0.29	0.30	0.08	0.31
Amharic	-	-	-	-
Arabic	0.09	-	-	-
Armenian	-	-	-	-
Bengali	-	-	-	-
Bosnian	-	-	0.06	-
Bulgarian	-	-	-	-
Cantonese	-	0.10	0.13	0.15
Chinese, n.i.e	0.13	0.44	0.27	0.36
Cree	-	-	-	-
Creoles	-	-	-	-
Croatian	-	0.09	-	-
Czech	-	-	-	0.06
Dutch	0.05	0.44	-	-
Finnish	-	-	-	-
German	0.11	1.33	0.05	0.21
Greek	-	-	0.07	-
Gujarati	-	-	-	-
Hebrew	-	-	-	-
Hindi	-	-	0.06	0.08
Hungarian	0.11	0.07	-	-
Italian	0.32	0.09	-	0.07
Japanese	-	0.08	-	0.11
Khmer (Cambodian)	-	-	0.06	0.06
Korean	0.14	-	-	0.41
Kurdish	-	-	-	-
Lao	-	-	-	-
Macedonian	-	-	-	-
Malay	-	-	-	0.06
Mandarin	0.12	-	-	0.14
Micmac	-	-	-	-
Mi'kmag	-	-	-	-
Montagnais-Naskapi	-	-	-	-
Ojibway	0.38	-	-	-
Oji-Cree	0.39	-	-	-
Punjabi (Punjabi)	0.42	-	0.10	0.81
Pashto	-	-	-	-
Persian (Farsi)	-	0.24	0.06	0.05
Polish	0.72	0.13	-	0.06
Portuguese	0.32	-	-	-
Romanian	0.09	-	0.10	-
Russian	-	-	0.08	0.08
Serbian	0.06	-	-	-
Serbo-Croatian	-	-	-	-
Slovak	-	-	-	-
Somali	-	-	-	-
Spanish	0.13	0.44	1.17	0.22
Tagalog (Pilipino, Filipino)	0.18	0.08	0.57	0.10
Tamil	-	-	-	-
Turkish	-	-	-	-
Ukrainian	-	0.05	-	-
Urdu	0.18	-	-	-
Vietnamese	0.29	0.16	0.20	0.26
Yiddish	-	-	-	-
Multiple Responses	0.73	0.71	0.60	0.75
Other	0.44	0.59	0.73	0.41

Source: FPMarkets – Canadian Demographics 2009

About Costs

Where costs are provided in this guide, such as for magazines, they are published rate card costs. However, actual costs by medium and by campaign can vary widely depending on many factors.

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 (CPM), using established industry audience measurement tools, are deployed by the media professional to establish benchmarks and relative efficiencies among competing suppliers. However, qualitative parameters 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.

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

Medium	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	
Television	Total	2,370	2,450	2,553	2,593	2,827	2,964	3,014	3,241	3,299	3,391
	National Spot	1,199	1,200	1,209	1,201	1,312	1,310	1,302	1,309	1,338	1,303
	Local Spot	433	428	418	386	389	383	385	393	407	400
	Network	419	425	469	480	503	544	539	633	581	641
	Specialty	304	381	438	509	607	708	769	882	948	1,025
	Infomercial	16	17	20	18	17	18	19	24	24	22
	Change	+1.7%	+3.4%	+4.2%	+1.6%	+9.0%	+4.8%	+1.7%	+7.5%	+1.8%	+2.8%
Daily Newspaper	Total	2,428	2,581	2,501	2,510	2,529	2,611	2,659	2,635	2,572	2,503
	National	557	592	574	576	580	599	610	605	590	575
	Local	1,072	1,139	1,104	1,108	1,116	1,174	1,174	1,163	1,135	1,105
	Classified	799	849	823	826	832	859	875	867	846	824
	Change	+2.1%	+6.3%	-3.1%	+0.4%	+0.7%	+3.2%	+1.9%	-0.9%	-2.4%	-2.7%
Radio	Total	953	1,001	1,048	1,080	1,171	1,209	1,313	1,388	1,467	1,547
	National	236	231	237	235	271	271	323	351	379	406
	Local	717	771	811	845	900	938	991	1,037	1,088	1,141
	Change	+3.6%	+5.1%	+4.7%	+3.0%	+8.4%	+3.3%	+8.6%	+5.7%	+5.7%	+5.5%
Internet	Total	56	110	97	176	237	364	562	900	1,241	1,602
	Search	-	-	-	-	-	-	-	343	478	602
	Display	-	-	-	-	-	-	-	314	432	490
	Classifieds/Directories	-	-	-	-	-	-	-	223	305	480
	Email	-	-	-	-	-	-	-	20	17	18
	Video	-	-	-	-	-	-	-	na	9	12
	Change	+124.0%	+96.4%	-11.8%	+81.4%	+34.7%	+53.6%	+54.4%	+60.1%	+37.9%	+29.1%
General Magazines	Total	460	514	541	558	610	647	665	682	718	692
	Change	+2.0%	+11.7%	+5.3%	+3.1%	+9.3%	+6.1%	+2.8%	+2.6%	+5.3%	-3.7%
Out-of-Home	Total	243	263	281	273	284	303	344	370	422	463
	Change	+10.9%	+8.3%	+6.9%	-2.8%	+4.2%	+6.4%	+13.6%	+7.7%	+14.0%	+9.7%
Catalogue/ Direct Mail	Total	1,190	1,255	1,264	1,285	1,383	1,490	1,532	1,608	1,639	1,662
	Change	-4.9%	+5.5%	+0.7%	+1.7%	+7.6%	+7.7%	+2.8%	+5.0%	+1.9%	+1.4%
Yellow Pages	Total	975	1,029	1,046	1,060	1,121	1,168	1,208	1,256	1,281	1,299
	Change	+4.3%	+5.5%	+1.7%	+1.3%	+5.8%	+4.2%	+3.4%	+4.0%	+1.9%	+1.4%
Miscellaneous	Total	1,119	1,165	1,177	1,192	1,261	1,314	1,359	1,413	1,441	1,461
	Change	+2.7%	+4.1%	+1.0%	+1.3%	+5.8%	+4.2%	+3.4%	+4.0%	+1.9%	+1.4%
Total Advertising	Total	9,794	10,368	10,508	10,728	11,424	12,070	12,656	13,494	14,079	14,620
	National	5,067	5,388	5,530	5,719	6,238	6,705	7,122	7,838	8,352	8,859
	Local	4,727	4,980	4,978	5,008	5,186	5,365	5,534	5,656	5,727	5,761
	Change	+2.0%	+5.9%	+1.4%	+2.1%	+6.5%	+5.7%	+4.9%	+6.6%	+4.3%	+3.8%
Total Television		2,370	2,450	2,553	2,593	2,827	2,964	3,014	3,241	3,299	3,391
Total Advertising		9,794	10,368	10,508	10,728	11,424	12,070	12,656	13,494	14,079	14,620
TV Share of Total Advertising (%)		24.2%	23.6%	24.3%	24.2%	24.7%	24.6%	23.8%	24.0%	23.4%	23.2%
Population (Millions)		30.4	30.7	31.0	31.4	31.7	32.0	32.3	32.6	32.9	33.3
Per Capita Television Advertising		78	80	82	83	89	93	93	99	100	102
Per Capita Total Advertising		322	338	339	342	361	377	392	413	428	439

*Sources:

Television: CRTC; **Daily Newspaper:** CNA for Total, estimates for breakdown; **Radio:** CRTC; **General Magazine:** Magazines Canada; **Outdoor:** estimate of net revenue based on NMR; **Direct Mail:** Canada Post; **Internet:** IAB; **Yellow Pages:** estimates based on last report by TeleDirect (1999); **Miscellaneous:** includes estimates for Community Newspaper, Trade & Other Print; **Population:** Statistics Canada Mid-Year Population by Year.

Note: Some figures may differ from previous charts due to updating. From 1991 forward, the source for all broadcast figures has been changed from Statistics Canada to CRTC. TVB has used internal estimates to correctly reflect the breakdown of Network and Spot revenue.

Figures in red represent Industry estimates. Broadcast revenue is based on the broadcast calendar ie. in each year indicated, the figures represent the revenue from Sep.01 of the previous year to Aug.31 of the indicated year. All other figures are based on revenue for the indicated calendar year.

MEDIA CROSS-OWNERSHIP 2009

(Based on CMDC Media Ownership and Share Report–July 2009 Edition)

Media Company	Canwest	Astral	CTV Globemedia	Rogers Media	Canadian Broadcasting Corp.	Corus	Quebecor	Pattison	RNC Media Inc	Torstar	Transcontinental Media
TV Networks	1		1		2		1				
TV Conventional	16*	2	29*	10	26*	3	8	3	5		
TV Specialty/Digital	19	14	34*	4	5	12*	5	1 investment	1	1 investment	
Radio Stations		84	34	53	80	53		29	15		
Daily Newspapers	13		1				56 1 in partnership			13	12
Non-Daily Newspapers	27						216			101	170
Consumer/Trade Magazines	5		1	87			66				50
Outdoor/Indoor Facings		6,911						18,817			

Editors Note

Canwest: CHCH Hamilton and CJNT Montreal have been sold but are still in the count as regulatory approvals required. Canwest plans to close CHEK Victoria and CHCA Red Deer by end of August

CTV Globemedia: Have sold CKX Brandon pending regulatory approval. Have sold Drive-In and Sex but still pending regulatory approval.

Canadian Broadcasting Corp.: 3 CBC stations became rebroadcasters in January therefore total was reduced by three.

Corus: Specialty number will increase by 2 if purchase from CTV is approved of Drive-In and Sex.

Growth of Net Advertising Revenue by Medium Index: 2001 = 100

Medium	2001	2002	2003	2004	2005	2006	2007	2008
Television								
Total	100	102	111	116	118	127	129	133
National Spot	100	99	109	108	108	108	111	108
Local Spot	100	92	93	92	92	94	98	96
Network	100	102	107	116	115	135	124	137
Specialty	100	116	139	162	176	201	216	234
Infomercial	100	90	85	90	95	120	120	110
Radio	100	103	112	115	127	132	140	148
Daily newspaper (Ex. classified)	100	100	101	104	106	105	103	101
General Magazines	100	103	113	120	123	127	133	128
Out of home	100	97	101	108	122	132	150	165
Internet	100	181	244	375	579	927	1279	1652
Catalogue/Direct mail	100	102	109	118	121	127	130	131
Yellow pages	100	101	107	112	115	120	122	123
Miscellaneous	100	101	107	112	115	120	122	124
Total - All media	100	102	109	115	120	129	133	139

Ethnic Media

ETHNIC MEDIA LANDSCAPE IN 2009

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 87 cultures in more than 370 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 – 59 Languages on 6 Analog and 79 Digital Stations

Analog Nationally: APTN (Aboriginal), and Vision TV (Arabic, South Asian). Regionally: OMNI1 & OMNI2 (Italian, Portuguese, Chinese and many other languages) and OMNI B.C., Teletatino (Italian & Spanish).

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

Radio – 66 languages aired on 57 stations

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

Print – 44 language groups in 228 publications

Daily papers are published in four languages – Chinese (4 papers), Italian (1), Korean (2) and Punjabi (1).

The remaining publications are issued weekly, bi-weekly or monthly.

Source: www.cardonline.ca

A Beginner's Guide to Ethnic Media

- Each ethnic paper or station must be purchased separately, which can be labour intensive and time consuming. Prepare for the possibility of a language barrier and book well in advance to limit delays.
- Many ethnic papers do not offer the variety of sizes and shapes that are typical in dailies and weeklies. Instead, they have set sizes for ads, which vary paper to paper.
- Colour is not universally available; sometimes only one colour is offered (e.g. red).
- Many ethnic media do not have audited circulation or measured audiences; however, excellent research for a few language audiences is available, particularly in the TV medium.
- Translation houses can usually accommodate the wide variety of languages used in large campaigns. For single ads, the media will often translate free of charge.
- Announcer-read scripts are common for radio and usually produced at no charge.
- For TV, commercials produced in the program content language are ideal. Some ads do appear in English or are dubbed into the content language.

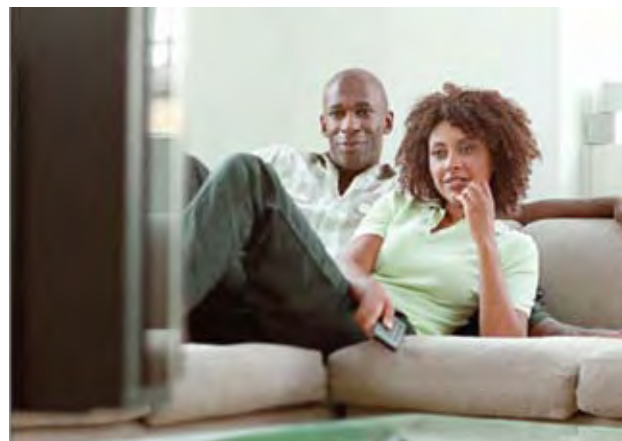
The only pan-Canadian group of French-language newspapers

on passe le mot

APF

www.apf.ca

A MESSAGE FROM



WELCOME TO THE TELEVISION SECTION OF THE 2009/2010 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 this Digest) is greater than ever. The Television Bureau of Canada (TVB), one of the sources for this section, welcomes any questions that extend beyond the scope of this Media Digest. For example, in this age of PVRs, how does the average household watch television? (Mostly live.) What is the incidence of commercial avoidance in PVR households? (13% of 18-49's start skipping commercials and then forget to do so.) What prompts a high percentage of PVR viewers to stop to watch a commercial? (Interest in the brand/product, or high entertainment value.) Recognizing the growth of viewing screen options, where do Canadians prefer to view television content? (Mostly on a television screen.) And we have explored the synergies between television and the internet, and the inherent marketing opportunities for advertisers to mine.

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

TELEVISION: IT'S A FACT:

- On average 5.2 million Canadians are watching television every minute of every day ¹
- Television reaches:
 - 82.4% of Canadians every day ¹
 - 99.3% of Canadians every week ¹
 - 100% of Canadians every month ¹
- Time spent watching television:
 - Person 2+: 26.4 hours per week ²
 - Adults 18-49: 23.4 hours per week ²
 - Adults 25-54: 25.6 hours per week ²
- More than 47,000 commercials are cleared to air on Canadian television stations every year ³
- Canadians report advertising delivered by television to be the most Engaging, Persuasive and Influential versus advertising delivered by any other medium ⁴
- 65% of Canadians report that their favourite ad was a television ad, and 87% of people who have had an emotional response to an ad say it was a television ad ⁵
- 98.2% of all time spent watching television in Canada is to Live versus Playback programming (PVR or VCR) which is skip/fast forward proof ⁶
- 70% of people who use a PVR report awareness of advertising even in fast forward ⁷
- 49% of Canadians have gone online to search for something they have seen in a television commercial, and 22% of those people completed an online purchase ⁸

FOR MORE INFORMATION CONTACT THE TELEVISION BUREAU OF CANADA AT 416-923-8813 OR VISIT TVB.CA

- 1) BBM Nielsen/InfoSysTV national meter data; Persons 2+; Total Canada; Total TV; M-Su 6a-6a; average 52 weeks ending August 9, 2009
- 2) BBM Nielsen/InfoSysTV national meter data; Total Canada; Total TV; M-Su 6a-6a; average 52 weeks ending August 9, 2009; per capita
- 3) TVB Telecaster Services fiscal 2007/08
- 4) Angus Reid Strategies May 2009 survey
- 5) BBM Analytics omniVu October 2008 survey; Adults 18-49
- 6) BBM Nielsen/InfoSysTV national meter data; Persons 2+; Total Canada; Total TV; M-Su 6a-6a; average 52 weeks ending August 9, 2009
- 7) BBM Analytics omniVu July 2008 survey; Adults 18+
- 8) BBM Analytics omniVu June 2008 survey; Adults 18-49

Television

DISTRIBUTION

TV markets	40
Commercial TV stations	145
HHs with TV	99%
HHs with satellite or cable	90%
Average number of channels in HH	133

CONSUMPTION

Daily reach	83%
Average hours per week	27%

GENERAL INFORMATION

- 67% of Canadians live in multi-set households (TV Basics 2008-2009)
- 15% of households have PVRs, up from 10% in early 2008 (BBM Media Technology Trends, December 2008)
- Canadians spend 32% of their viewing time with U.S. Stations (BBM Fall 2008 Daily Reach %)
- The average weekly viewing hours for Canadians 2+ is 26 hours and 48 minutes
- 30-second commercial lengths are the most popular format for television advertising in Canada, representing 58% of all commercial time produced in Canada (TV Basics 2008-2009)

NATIONAL NETWORKS

There are two English and two French national commercial networks operating in Canada.

English-language

CBC English
CTV

FRENCH-LANGUAGE

Radio-Canada (CBC French)
TVA

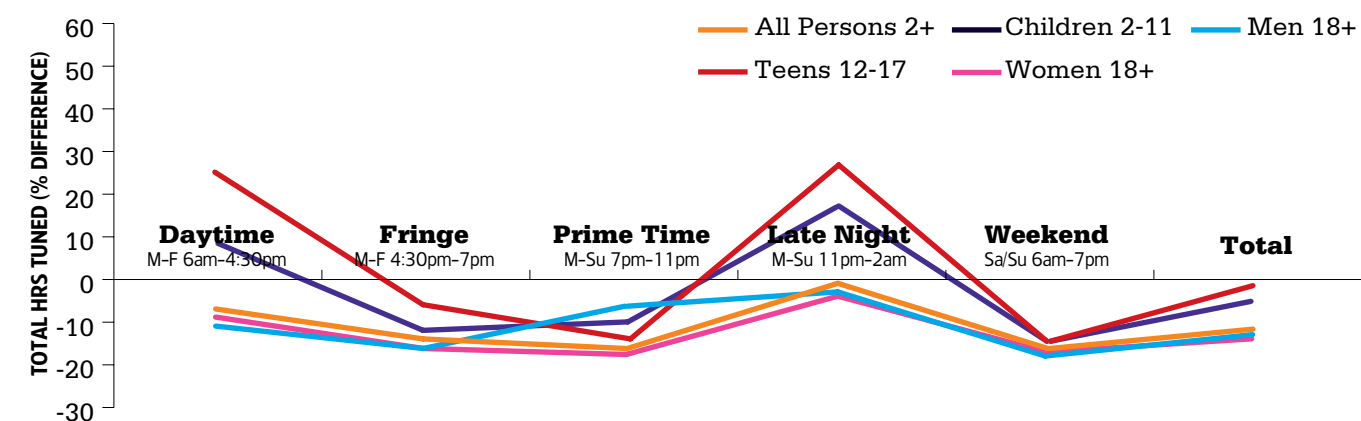
CBC TELEVISION A 24-hour English-language network for news, information, sports and entertainment programming produced by, for and about Canadians.

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.

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.

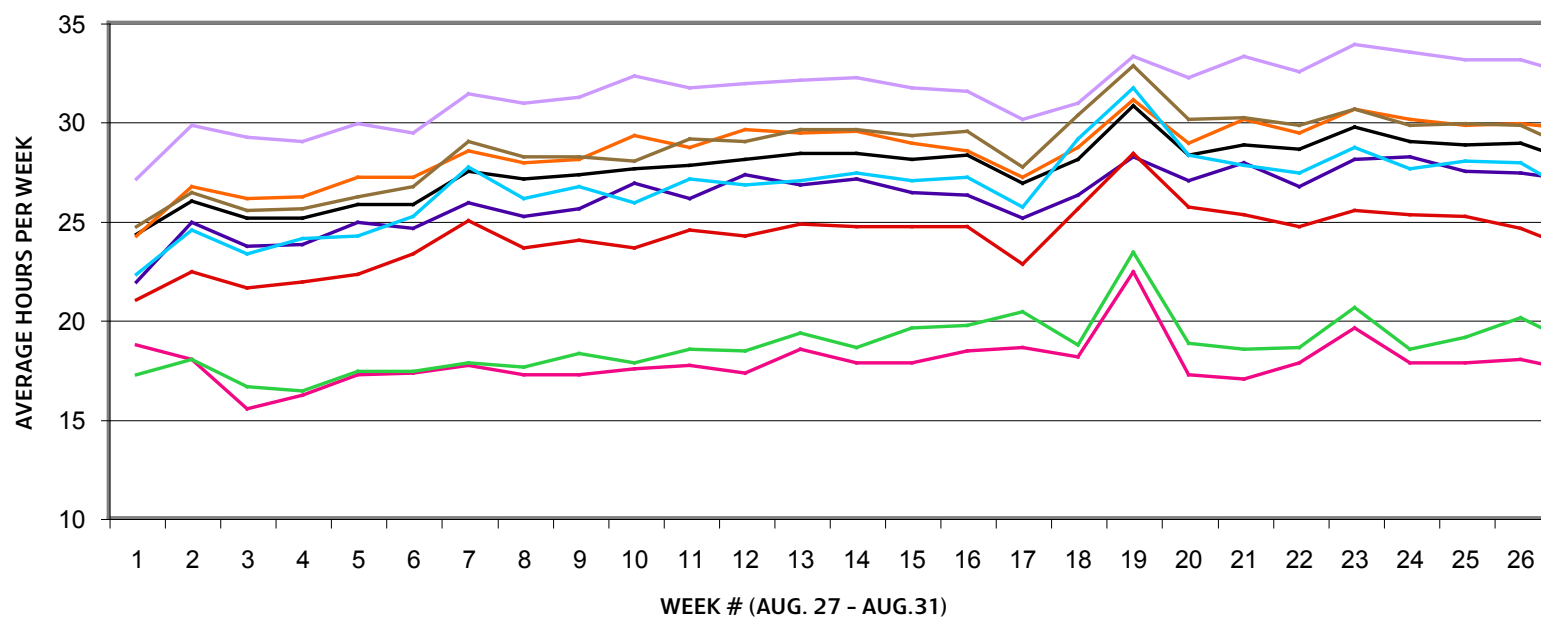
TVA is a private French-language television network that produces and broadcasts entertainment and public affairs programming. TVA owns and operates six of the ten stations comprising the TVA Network and four affiliates. Two of those affiliates are owned by Télé Inter-Rives Ltée, in which TVA has 45% 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 DROP-OFF



Source: BBM-NMR-PPM Spring, Summer, Fall 2008 *Meter Data

AVERAGE VIEWING TREND - MONDAY TO SUNDAY 6AM-6AM



Source: BBM-NMR-PPM Fall 2008

VCR, DVD AND PVR PENETRATION

	VCR		PVR		VCR Penetration%	DVD Penetration%	PVR Penetration%
	Reach %	Share %	Reach %	Share %			
Atlantic							
2003	18.9	3.7	N/A	N/A	75.4	31.3	N/A
2008	14.5	2.9	3.7	1.0	60.0	70.3	6.1
Quebec							
2003	19.9	3.6	N/A	N/A	76.8	35.2	N/A
2008	16.2	2.9	4.3	1.2	54.0	70.0	9.5
Ontario							
2003	20.3	4.5	N/A	N/A	79.0	40.4	N/A
2008	18.7	4.1	5.7	1.8	58.4	75.6	13.1
Prairies							
2003	25.1	5.7	N/A	N/A	76.6	45.0	N/A
2008	22.6	5.3	7.8	2.7	54.7	75.1	15.0
B.C.							
2003	23.6	5.1	N/A	N/A	75.6	43.5	N/A
2008	20.7	4.4	6.7	2.0	61.6	78.8	13.5
Total Canada							
2003	21.4	4.5	N/A	N/A	77.4	39.6	N/A
2008	18.7	3.9	5.7	1.8	56.8	74.3	12.3

Source: BBM Fall 2003 & 2008

REGIONAL NETWORKS - ENGLISH

ACCESS provides educational television service to Alberta and is carried on basic cable and satellite services. It is also carried by Star Choice and Bell ExpressVu in their basic English packages to all of Canada. Preschool children's programs carry no advertising.

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

CP24 A 24-hour local news channel that is offered to basic cable subscribers of the Rogers and Shaw systems in the Toronto DMA. CP24 is owned by CTVglobemedia.

CBC Regional Networks

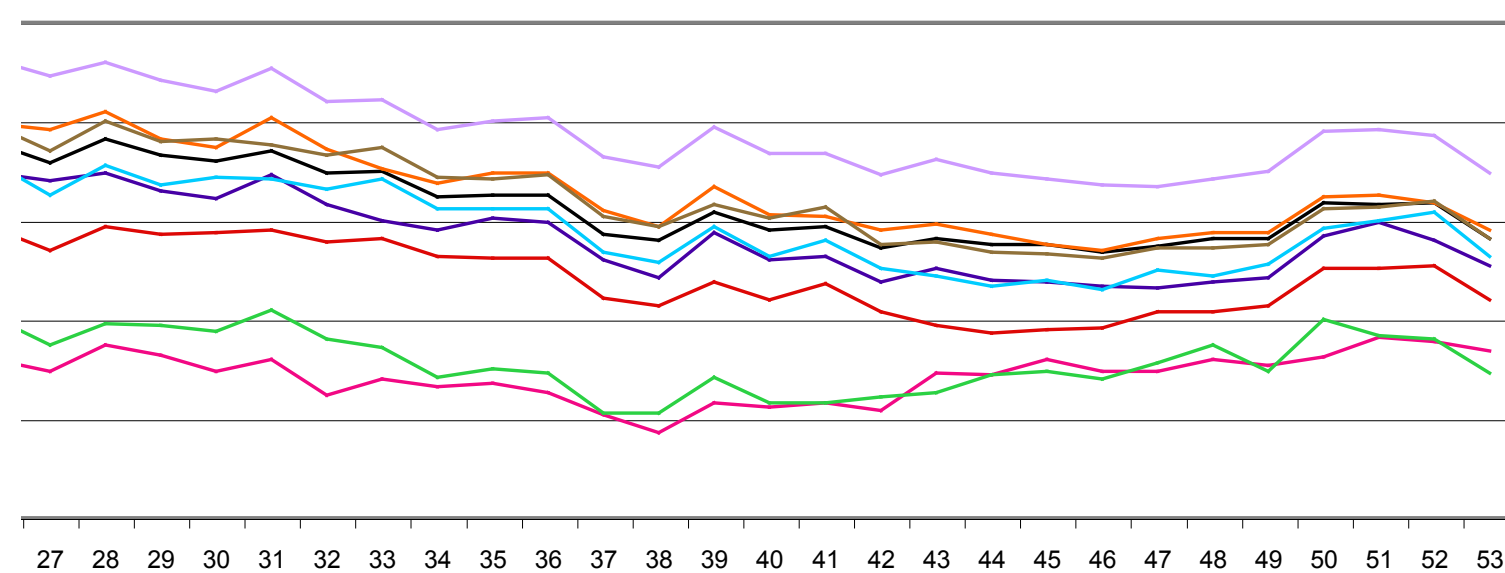
- **CBC MARITIMES** covers New Brunswick, PEI and Nova Scotia.
- **CBC ONTARIO** covers Ontario.
- **CBC PACIFIC** covers British Columbia.
- **CBC WESTERN** covers Manitoba, Saskatchewan and Alberta.

• **CBC NORTH** covers the Northwest Territories.

CITYTV Owned by Rogers, Citytv serves Toronto, Calgary, Edmonton, Vancouver and Winnipeg and surrounding areas with its intensely-local, urban-oriented and culturally-diverse programming.

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. Kenora and Thunder Bay are not CTV-owned.
- **CTV SASKATCHEWAN** covers 97% of the provincial population.

Canwest Regional Networks

- **GLOBAL TELEVISION NETWORK** is owned by Canwest. 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.
- **E!** covers Ontario (85%), Alberta (55%) and has stations in Victoria serving Vancouver/Victoria DMA, Kelowna serving Okanagan-Kamloops EM and Montreal Angelo. Combined E! Network covers over 75% 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 TV (DRTV) channel broadcasting in south-central Ontario region and Nova Scotia regions including Toronto and Halifax. Available in 1.7 million households. Owned by Torstar Media Group. Aired both short and long form advertising.

REGIONAL NETWORKS - FRENCH

TÉLÉ-QUEBEC Supported by the Quebec government, covering the entire province. Programming focus is on entertainment, culture and education.

TELEVISION QUATRE SAISONS (TQS) 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** Business News Network (formerly Report on Business Television) 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 NEWSWORLD** 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, the network offers a mix of comedy

and dramatic series, movies and country music news, videos, concerts and specials.

CTV NEWSNET CTV Newsnet is a 24-hour, all-news network

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

FAIRCHILD TELEVISION A national Chinese-language network serving larger cities in Canada. Time may be purchased nationally or regionally.

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

HGTV offers ideas on home renovation and landscaping.

HISTORY CHANNEL offers documentaries and dramas about events and people that have and continue to shape the world.

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 music-related programming to its audience of teens and young adults.

MUCHMOREMUSIC Geared toward the older siblings of MuchMusic fans, sister station MuchMoreMusic delivers concert specials, music videos, entertainment news, pop-culture programming, exclusive celebrity shows and classic movies.

OLN is Canada's ticket to adventurous entertainment with real and rugged experiences from around the world.

ROGERS SPORTSNET is a regional sports network. It consists of four regions: Sportsnet Ontario, Sportsnet East, Sportsnet West (Alberta, Saskatchewan, Manitoba, Northwest

PAY TV & SPECIALTY SERVICES – AVERAGE WEEKLY HOURS PER VIEWER TUNED & REACH % OF PAY-TV & SPECIALTY SERVICES * NON-U.S., INCLUDES DIGITAL STATIONS

Fall '07 Mo-Su 6a-6a Stations	TOTAL CANADA											
	IND. 2+		ADULTS 18+		WOMEN 18+		MEN 18+		TEENS 12-17		CHILDREN 2-11	
	AvWkHrs	AvWkRch%	AvWkHrs	AvWkRch%	AvWkHrs	AvWkRch%	AvWkHrs	AvWkRch%	AvWkHrs	AvWkRch%	AvWkHrs	AvWkRch%
Adrenaline Drive (MovieCentral2)	1.3	2.7	1.3	3	1.3	2.5	1.2	3.5	1.3	2.1	1	1.1
Animal Planet	1.5	2.9	1.6	2.9	1.9	2.8	1.3	3.1	0.8	2.4	1.4	2.7
AOV - ADULT	0	0	0	0	0.1	0	0	0	.	0	.	0
MOVIE CHANNEL												
AOV - MALEFLIXXX	2.1	0	2.1	0	2.1	0	.	0	.	0	.	0
AOV - XXX ACTION	.	0	.	0	.	0	.	0	.	0	.	0
CLIPS												
APTN HD	0.2	0.2	0.2	0.2	0.3	0.1	0.2	0.2	0	0.3	0	0
APTN+	0.5	7.5	0.5	8.5	0.5	7.5	0.5	9.6	0.4	2.5	0.4	3.3
APTN-N	0.7	0.4	0.7	0.5	0.7	0.4	0.6	0.5	0.2	0.1	0.2	0.1
ATN Caribbean	0.8	0.1	0.9	0.1	0.3	0.1	1.2	0.1	0.6	0.2	0.6	0.1
ATN Cricket	1.7	0	1.9	0	1	0	2.4	0	0	0	.	0
Plus Channel												
BBC Canada	1.5	2.8	1.5	3.1	2	2.9	1.2	3.3	0.8	1.8	0.9	0.6
BBC Kids	0.6	1.6	0.6	1.4	0.6	1.3	0.5	1.6	0.6	1.4	1	3.1
BIO	0.7	2.3	0.7	2.5	0.8	2.3	0.6	2.8	0.5	1.5	0.4	1.1
BITE	0.2	0.1	0.2	0.1	0.2	0	0.2	0.1	.	0	0.1	0
BNN Business	1.3	3.8	1.4	4.4	1	3.6	1.7	5.2	0.4	1.5	0.1	1.2
News Network												
Bold	0.3	0.6	0.3	0.7	0.4	0.6	0.3	0.9	0.3	0.2	0.2	0.2
Book TV	0.6	0.5	0.6	0.6	0.8	0.6	0.5	0.7	0.2	0.2	0.5	0.1
BPM TV	0.2	0.4	0.1	0.4	0.1	0.3	0.1	0.6	0.6	0.5	0.1	0.1
Bravo!	1.3	18.2	1.3	20.9	1.7	20.2	1	21.6	0.7	8.8	0.5	5.4
Christian Channel	0.7	0.3	0.7	0.3	0.9	0.3	0.6	0.3	0	0	0.1	0.1
CMT	1	15.2	1	16.7	1.2	17	0.8	16.4	1.2	10.7	0.6	7.2
Comedy+	1.1	20	1.1	21.1	0.9	18.1	1.3	24.3	1.3	22.6	0.8	10
Cool TV	.	0	.	0	.	0	.	0	.	0	.	0
Cosmo TV	1	1.9	0.9	2.1	1	2.6	0.6	1.6	3	1.5	0.8	0.6
CourtTV Canada	1.3	1.6	1.3	1.8	1.3	1.5	1.4	2	0.6	0.8	0.8	0.6
CP24	1.3	8.8	1.4	9.6	1.6	9.7	1.1	9.5	1	5	0.6	5.1
CTV Newsnet	1.2	12	1.2	13.8	1.2	12.8	1.3	14.9	0.4	4.4	0.3	4.1
Deja View	1.5	2.5	1.6	2.7	2	2.5	1.3	2.8	0.7	0.9	0.7	2
Discovery	1.4	25.9	1.4	27.4	1	22.9	1.6	32	1.3	25.6	1.4	15.7
Discovery Civilization	1	2.4	1	2.7	0.9	2.1	1.1	3.3	0.4	1.3	0.3	0.9
Discovery HD	0.6	1.5	0.6	1.6	0.5	1.2	0.7	1.9	0.3	1.4	0.4	1
Discovery Health	0.8	2.4	0.8	2.7	1.1	3	0.5	2.4	0.4	1.5	0.6	1
Discovery Kids	0.8	0.9	0.5	0.5	0.5	0.5	0.4	0.5	0.7	1.5	1.3	3.5
Documentary	0.5	1.1	0.5	1.3	0.4	0.9	0.5	1.7	0.2	0.5	0.2	0.3
Drive-In Classics	0.8	2.1	0.9	2.4	0.9	1.9	0.8	3	0.3	0.7	0.3	0.7
Encore 2 (MovieMax2)	1.3	6.9	1.3	7.7	1.4	7.2	1.3	8.4	0.8	3.6	0.8	3
Encore Ave. (MovieMax)	0.9	0.9	0.9	1	1	1	0.8	1.1	1.2	0.3	0.7	0.4
Encore Ave. HD	1.2	0.1	1.1	0.1	0.9	0.1	1.1	0.2	1.4	0	4	0
Equator HD	0.5	0.1	0.6	0.1	0.7	0.1	0.4	0.1	0.1	0	0.1	0
ESPN Classic	0.4	0.7	0.4	0.8	0.3	0.5	0.4	1.1	0.2	0.6	0.6	0.3
Family+	2.5	19.3	1.3	15.1	1.4	15.1	1.1	15	4.4	37.6	4.6	37.5
Fashion TV	0.4	0.7	0.3	0.8	0.3	0.8	0.3	0.7	0.7	0.8	0.3	0.1
Fight	0.7	0.9	0.7	1	0.3	0.7	0.9	1.3	0.7	0.5	0.3	0.3
Fine Living	0.6	0.9	0.6	1	0.6	1	0.6	1	0.6	0.3	0.5	0.3
Food Network	1.5	13.3	1.5	14.5	1.8	15	1.2	13.9	0.7	8.6	1.5	7.9
Fox Sports Canada	0.7	0.9	0.8	0.9	0.4	0.8	1	1.1	0.5	1.5	0.1	0.3
G4Tech TV	1	1	1.1	1	0.6	0.6	1.3	1.4	1.2	1.2	0.5	0.5
Game TV	0.6	1.4	0.6	1.6	0.6	1.1	0.7	2.2	0.5	0.4	0.5	0.5
Gol TV (Soccer)	1.1	0.2	1.3	0.3	1.1	0.2	1.4	0.3	0.4	0.3	0.1	0.2
Green Channel	.	0	.	0	.	0	.	0	.	0	.	0
Hard On Pridevision	0	0	.	0	.	0	.	0	.	0	0	0
HBO Canada East	1	3.7	1	4.1	0.9	3.3	1.1	4.9	0.6	2.4	0.6	1.4
HBO Canada West	0.9	2.5	0.9	2.8	1	2.4	0.9	3.2	0.7	1.5	0.7	0.9

ENGLISH CANADA CONT'D

Fall '07 Mo-Su 6a-6a Stations	ALL 2+		ADULTS 18+		WOMEN 18+		MEN 18+		TEENS 12-17		CHILDREN 2-11	
	AvWkHrs	AvWkRch%	AvWkHrs	AvWkRch%	AvWkHrs	AvWkRch%	AvWkHrs	AvWkRch%	AvWkHrs	AvWkRch%	AvWkHrs	AvWkRch%
Heartland Road (MovieCentral3)	1.1	2.3	1.1	2.5	1.3	2.4	1	2.6	1.4	1.8	0.8	1.2
HGTV	1.5	18	1.6	20	1.9	20.7	1.3	19.4	0.7	9	0.8	9.4
History+	1.9	21.7	2	24.4	1.8	20.8	2.1	28.1	0.8	11.9	1	8.4
Horse Playing Interactive	0.6	0.1	0.7	0.1	0.9	0.1	0.5	0.1	0	0	0.2	0
Hustler	0.4	0	0.4	0	0.1	0	0.5	0.1	0	0	.	0
ichannel	0.5	0.5	0.5	0.6	0.6	0.5	0.4	0.6	0.2	0.3	0.2	0.1
IFC	0.9	4.1	0.9	4.7	0.8	3.7	1	5.7	0.8	2	0.4	1.2
Leafs TV	1	1	1	1.1	1	0.7	1	1.5	0.7	0.8	0.6	0.6
M (TMN1)	1.3	4.7	1.4	5.1	1.4	4.4	1.4	5.8	1.1	4.1	0.7	2.7
M Excess (TMN3)	1.1	4.5	1.2	4.9	1	3.8	1.3	6	0.7	3.7	0.5	1.8
M Fest (TMN5)	0.8	2.3	0.8	2.6	0.8	2.2	0.8	2.9	0.4	1.4	0.3	0.7
M Fun (TMN4)	1.2	3.5	1.2	3.7	1.3	3.3	1.2	4.2	1.1	3.7	1.2	1.9
Men TV	0.5	1.3	0.5	1.5	0.5	1.1	0.5	1.9	0.2	0.4	0.2	0.4
Morepix	0.8	2.7	0.9	3	0.9	2.7	0.9	3.4	0.5	1.8	0.3	1.2
Movie Central	1.4	3.2	1.5	3.4	1.6	3	1.4	3.8	1.2	2.3	1.2	2
Movie Pix HD	0.6	0.4	0.7	0.5	0.5	0.4	0.7	0.6	0.5	0.2	0.2	0.2
MovieMax (Expressvu East)	.	0	.	0	.	0	.	0	.	0	.	0
Movieola	0.1	0.3	0.1	0.4	0.1	0.2	0.1	0.5	0	0.1	0	0.1
MovieTime	1.5	2.7	1.6	3.1	1.6	2.5	1.6	3.6	0.8	1.8	0.9	0.8
MPix	1.3	4.7	1.4	5.2	1.2	4.3	1.4	6.1	0.6	2.7	0.6	2.3
MSNBC	1.6	1.5	1.7	1.7	1.2	1.3	2.1	2.2	0.1	0.7	0.1	0.5
MTV	0.9	8.1	0.8	8.2	1	8.6	0.6	7.7	1.3	12	0.5	4.4
MTV2	0.7	1.4	0.6	1.4	0.6	1.1	0.6	1.7	0.9	2.9	0.6	0.8
MuchLOUD	0.3	0.3	0.4	0.3	0.2	0.2	0.4	0.4	0.3	0.2	0.1	0.1
MuchMoreMusic	0.7	12.5	0.7	13.5	0.7	13.5	0.6	13.6	0.7	10.6	0.5	6.7
MuchMoreRetro	0.1	0.2	0.1	0.3	0.1	0.2	0.1	0.3	0	0.1	0.1	0.2
MuchMusic	0.7	17.1	0.6	17.2	0.7	16.9	0.6	17.6	1.3	24.1	0.7	11.2
MuchVibe	0.7	0.3	0.7	0.3	0.5	0.3	0.9	0.4	0.4	0.3	0.3	0.2
Mystery	2.4	3.3	2.5	3.8	3.1	3.9	1.8	3.6	0.7	1.9	0.5	0.9
National Geographic	1.3	6.1	1.3	6.9	1.3	5.8	1.3	8	0.7	3.7	1.2	2.5
New Delhi TV	.	0	.	0	.	0	.	0	.	0	.	0
NewsWorld	1.4	20	1.4	23	1.5	21.5	1.3	24.4	0.4	8.7	0.4	6.3
NHL Network	0.9	0.5	0.8	0.5	0.7	0.4	0.9	0.7	0.8	0.6	1.4	0.3
Oasis HD	1.2	0.1	1.2	0.1	1.8	0.1	0.5	0.1	1.4	0	.	0
OLN	0.6	9.5	0.6	10.5	0.6	8.8	0.6	12.2	0.5	5.7	0.8	4.8
One:Body, Mind, Spirit	0.5	0.6	0.5	0.7	0.7	0.8	0.4	0.6	0.1	0.2	0.1	0.1
Out TV	0.4	0.3	0.4	0.3	0.4	0.3	0.4	0.3	0.3	0.2	0	0
Penthouse TV	0	0	0	0	.	0	0	0	.	0	.	0
Pet TV	0.9	0	0.8	0	1.1	0.1	0.4	0	0.6	0	2.1	0
Playhouse Disney	4.6	1.2	3.6	0.8	4.5	0.9	2.4	0.7	2.6	0.4	6	4.6
PunchMuch	0.2	0.4	0.2	0.4	0.2	0.3	0.1	0.5	0.4	0.5	0.1	0.2
Raptors TV	1	0.7	1	0.8	0.5	0.4	1.3	1.1	0.5	0.8	0.8	0.3
Red Light District TV	0.5	0	0.5	0	0	0	0.7	0	.	0	.	0
Rush HD	0.5	0	0.5	0.1	0.8	0	0.4	0.1	0.7	0	0.4	0
Salt & Light	0.5	0	0.5	0.1	0	0	0.5	0.1	.	0	.	0
Score	0.9	11.7	0.9	12.5	0.6	7.8	1.1	17.4	0.9	9	0.7	7.4
Scream	1.2	3.4	1.3	3.7	1.3	3	1.3	4.5	0.8	2.1	0.5	1.4
SexTV	0.5	1.4	0.6	1.7	0.5	1.1	0.6	2.3	0.4	0.3	0.2	0.4
Showcase Action	1.5	6	1.5	6.6	1.3	5.1	1.7	8.1	1.1	4.4	0.7	2.5
Showcase Diva	1.5	5.2	1.6	5.8	1.7	5.5	1.4	6.2	1	3.9	0.8	1.8
Showcase+	1.1	22.2	1.2	24.9	1.2	21.9	1.1	28	0.9	13.8	0.6	7.6
Silver Screen Classics	1.3	0.6	1.3	0.6	1.2	0.5	1.4	0.7	0.8	0.3	0.3	0.1
Slice	0.8	13.1	0.8	14.5	1	16.5	0.5	12.5	0.6	7.6	0.7	6.5
Space	1.4	14.8	1.5	16.3	1.3	13.4	1.6	19.3	0.7	9.3	0.8	7.4
Sportsnet East+	0.8	6.4	0.8	7.1	0.7	5	0.9	9.2	1.2	3	0.3	3.4
Sportsnet National+	1.4	22.4	1.5	24.4	1.1	18.4	1					

TOTAL CANADA CONT'D												
Fall '07 Mo-Su 2a-2a Stations	ALL 2+		ADULTS 18+		WOMEN 18+		MEN 18+		TEENS 12-17		CHILDREN 2-11	
	AvWkHrs	AvWkRch%	AvWkHrs	AvWkRch%	AvWkHrs	AvWkRch%	AvWkHrs	AvWkRch%	AvWkHrs	AvWkRch%	AvWkHrs	AvWkRch%
Super Channel 1	1.1	0.6	1.1	0.7	1.1	0.6	1.1	0.7	1.2	0.3	1	0.2
Super Channel 2	1.5	0.5	1.5	0.5	1.7	0.4	1.4	0.6	0.4	0.2	1.8	0.3
Super Channel 3	1	0.4	1	0.4	1.1	0.4	0.9	0.4	0.6	0.2	1	0.1
Super Channel 4	1.1	0.4	1.2	0.5	1.4	0.5	1	0.5	0.7	0.1	0.2	0.1
Super Channel HD	0.7	0.1	0.7	0.1	0.5	0.1	0.8	0.1	0.4	0.1	1.2	0.1
Teletoon Eng+	1.5	16.9	1	13.7	1	12.3	0.9	15.2	1.8	25.8	3	33.7
Teletoon Retro Eng	1.6	4.3	1.3	3.6	1.2	3.2	1.3	4	1	5	2.6	9.4
TMN HD	1.1	0.9	1.1	1	1	0.6	1.2	1.3	0.9	0.6	0.9	0.3
TMN MM HD	.	0	.	0	.	0	.	0	.	0	.	0
Travel + Escape	0.6	1.1	0.6	1.2	0.6	1.1	0.6	1.4	0.1	0.3	0.7	0.2
Treasure HD	0.7	0.1	0.7	0.1	0.6	0.1	0.7	0.1	.	0	.	0
Treehouse	3.5	10.7	2.4	7.9	2.8	8.6	1.9	7.3	1.9	6.5	5.7	34.5
TSN+	2	28.5	2.1	30.5	1.4	23.6	2.5	37.6	1.3	20.6	0.9	19.3
TSN2	0.7	3.6	0.7	3.9	0.5	2.6	0.8	5.3	0.4	2	0.4	2.7
TV Land	1.5	1.2	1.6	1.3	2.2	1.3	1.1	1.4	0.5	0.8	0.5	0.4
Tvtropolis+	1.3	17.7	1.3	18.9	1.5	17.8	1.2	20.2	1	16.9	0.9	8.9
Vision	1.1	7.8	1.1	9.1	1.3	10	1	8.3	0.4	2.3	0.5	2.2
Viva	0.8	3.9	0.8	4.5	1	4.7	0.6	4.3	0.4	1.3	0.4	1
W Network+	1.4	19.8	1.5	22.3	1.9	26	0.9	18.4	0.8	10.6	0.7	7.8
Weather	0.7	19.3	0.8	21.6	0.8	21.3	0.8	22	0.4	9.2	0.5	9.6
WFN (Fishing)	0.9	0.2	0.9	0.2	0.9	0.1	0.9	0.3	1.2	0.1	0.4	0.1
Wild TV	1.6	0.4	1.6	0.4	1	0.4	2.1	0.5	2	0.4	1.5	0.5
Xtreme Sports	0.5	0.2	0.4	0.1	0.5	0.1	0.4	0.2	0.5	0.5	0.9	0.2
YTV+	1.5	22.9	0.9	19.3	0.9	19.1	0.8	19.5	2	35.8	3.3	39.9
TOTAL Spec/Pay	9.9	82.7	10.1	82.2	9.5	81.5	10.7	82.9	7.9	82.4	9.9	86.4

Source: BBM-NMR-PPM Fall 2008

QUEBEC FRANCO												
Fall '07 Mo-Su 2a-2a Stations	IND. 2+		ADULTS 18+		WOMEN 18+		MEN 18+		TEENS 12-17		CHILDREN 2-11	
	AvWkHrs	AvWkRch%	AvWkHrs	AvWkRch%	AvWkHrs	AvWkRch%	AvWkHrs	AvWkRch%	AvWkHrs	AvWkRch%	AvWkHrs	AvWkRch%
ARTV	1.3	37.1	1.3	39.6	1.4	39.6	1.3	39.6	0.8	24.4	0.6	26.3
Canal D	1.9	54	2	55.2	2	53.2	1.9	57.2	1.5	52.7	1.3	45
Evasion	0.6	23.8	0.6	25.6	0.7	25.2	0.6	26.1	0.4	13.7	0.3	16.2
Canal Vie	2.1	49	2.2	49.8	2.9	51.7	1.5	47.9	1.9	42.8	1.4	47
Historia	1.5	36.4	1.6	37.8	1.8	36.2	1.5	39.5	1.2	29.6	0.7	29.6
LCN	1.9	52.1	2	54.7	2.1	53	2	56.5	1.2	37.4	0.9	42.1
Meteomedia	0.4	41.7	0.4	43.5	0.5	43.8	0.4	43.2	0.3	30.5	0.3	35.3
MusiMax	0.5	31.7	0.5	31.8	0.5	30.9	0.5	32.6	0.4	30.1	0.4	32.4
MusiquePlus	0.5	33.5	0.5	32.4	0.5	30.1	0.5	34.9	0.8	45.3	0.5	33.2
RDI	2	45.5	2.2	48.1	2.2	46	2.2	50.3	0.9	33.9	0.7	32.9
RDS	2.7	58.3	2.8	59.2	2.3	53.9	3.3	64.6	2.9	56.7	1.8	52.7
RDS Interactive	.	0	.	0	.	0	.	0	.	0	.	0
Series+	3.2	33.5	3.5	35.1	4.2	35.6	2.7	34.7	1.8	21.7	1.7	28.8
Super Ecran 1	1.7	24	1.7	23.3	1.7	21.5	1.7	25.2	1.7	31.5	1.7	24.1
Super Ecran 2	1.4	21.3	1.3	20.5	1.3	18.7	1.3	22.3	1.4	28	1.7	22.8
Super Ecran 3	0.7	15.5	0.8	15.4	0.8	13.7	0.7	17.2	0.7	18.7	0.6	13.8
Super Ecran 4	1.4	20.6	1.4	20	1.3	18.2	1.4	21.9	1.5	28.1	1.4	20.3
Super Ecran HD	.	0	.	0	.	0	.	0	.	0	.	0
Teletoon Fr.	2.5	42.4	1.9	37.9	1.9	36.6	1.8	39.2	2.7	55.2	4.9	69.7
TV5	1.1	28.3	1.1	30.7	1.3	31.2	1	30.2	0.5	16.9	0.4	16.8
VRAK	1.9	41	1.2	36.7	1.3	36.3	1.1	37.1	4	69.5	3.4	55
Z-tele	1.6	40.8	1.6	41.2	1.5	38.3	1.8	44.1	1.6	40.5	1.7	38.1
Argent	0.6	5.2	0.6	5.6	0.5	5	0.7	6.2	0.6	4.5	0.1	2.4
Avis de Recherche	.	0	.	0	.	0	.	0	.	0	.	0
Cinepop	1.6	10	1.7	10.4	1.7	10.1	1.8	10.7	0.9	9.6	1.2	7.3
Mystere	1.3	11.7	1.4	12.1	1.5	11.7	1.4	12.6	0.9	10.1	0.6	9.3
Prise 2	1	9.9	1.1	10.2	1.2	9.9	0.9	10.4	1.2	9.4	0.4	7.7
RIS	0.5	16.1	0.5	16.1	0.5	12.9	0.6	19.5	0.5	18.6	0.3	13.8
Les idées de ma maison	1.1	6.2	1.1	6.2	1.5	6.4	0.8	6.1	0.6	6.5	0.6	5.4
Teletoon Retro Fr	0.8	5.1	0.8	4.7	0.8	4.4	0.7	4.9	0.7	5.4	1.3	8.9
TOTAL Spec/Pay	13.5	95	13.7	95	13.8	94.5	13.5	95.6	13.4	94.2	12.2	95

Source: BBM-NMR-PPM Fall 2008

PER CAPITA HOURS

Stations	Percent Distribution of Weekly Per Capita Hours by Daypart: Total Canada					
	Ind. 2+	A18+	F18+	M18+	T12-17	C2-11
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 6a-4:30p	22.8	22.3	24.4	20.0	20.3	29.7
M-F 4:30p-7p	7.1	6.9	7.2	6.5	8.7	9.4
M-Su 7p-11p	41.0	41.9	41.4	42.5	41.8	30.3
M-Su 11p-2a	11.6	12.3	11.5	13.3	9.0	4.1
Sa 6a-7p	8.1	7.6	7.2	8.0	9.7	13.3
SU 6a-7p	9.4	9.0	8.3	9.8	10.6	13.3

Source: BBM-NMR-PPM Fall 2008

Territories and Nunavut) and Sportsnet Pacific (BC and Yukon Territories).

SLICE is a women's lifestyle channel targeting females 18-49. Programming includes talk shows and reality TV.

SHOWCASE offers uncut movies and series.

THE SCORE is a national specialty television network providing sports news, information, highlights and live event programming in more than 6.4 million homes across Canada.

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

THE SHOPPING CHANNEL is a 24-hour a day, shop at home retailer across Canada and online at theShoppingChannel.com

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

TALENTVISION A Mandarin-language television network that runs news, current affairs and informational programs. Also airs popular drama series and variety shows from Taiwan and China.

TELETOON airs animation for all ages. Available in both in English and French,

THE COMEDY NETWORK A specialty comedy service, it 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 Treehouse offers fun and imaginative programming for both children and parents. The lineup contains children's programming from Canada and around the world

TLN (Telelatino) offers programming in Italian, Spanish and English. TLN offers a variety of domestic and international programming including comprehensive news reports series and feature films., dramas, music specials, award-winning soap operas and live soccer from Italy, Europe and Latin America.

TSN is Canada's sports network. Its programming and news content are also available online at TSN.ca

TVTROPOLIS TVtropolis is the home of back-to-back, recent iconic hits.

VIVA is a specialty television service targeted to women aged 40-64 that offers program-

ming designed to enrich, inspire, guide and inform audiences.

VISION A multi-faith network that also airs secular family programming.

W NETWORK is committed to bringing women entertainment television. W delivers everything from Hollywood hits and popular dramas to lifestyle programs.

YTV is aimed at kids aged 6-11 and their families.

SPECIALTY NETWORKS - FRENCH

ARTV A blend of arts and culture, showcasing the best in film, theatre, music, dance, visual arts and more,

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

CANAL D Documentary and comedy programming.

CANAL EVASION A tourism, travel and adventure channel.

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

LE CANAL NOUVELLES (LCN) Presents news updates every 15 minutes focusing primarily on Quebec.

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

MUSIMAX Offering pop music to adults 25-54.

MUSIQUEPLUS The multi-platform for music, entertainment and today's lifestyle for an 18-34 year old audience.

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

RDS Le Réseau des Sports (RDS) is the world's only French-language, all-sports network.

SÉRIES+ Drama, romance and investigative programming.

TÉLÉTOON (FRENCH) is dedicated to all forms of animation. Targets all ages in distinct time

blocks.

TV5MONDE Encompasses 10 broadcast partners across the globe and creates a space dedicated to public expression. It airs programming that increases awareness of the diversity of cultures.

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

ANIMAL PLANET Animal Planet offers a journey into the animal world at home and around the globe through documentaries and programming.

ATN Asian Television Network provides television programming in several South Asian languages. ATN owns and operates 14 specialty TV channels.

BBC CANADA BBC Canada features lifestyle, drama and comedy content from Britain and the BBC.

BBC KIDS offers a lineup of children's programming from the UK and around the world.

BIO, THE BIOGRAPHY CHANNEL is a 24-hour channel dedicated to showcasing the real stories behind celebrity and pop-culture, with programming from biographies and documentaries to weekly series and films.

BITE TV An interactive TV station aimed at men 18-34. Aims comical, irreverent and edgy Canadian and international short form films, video and animation.

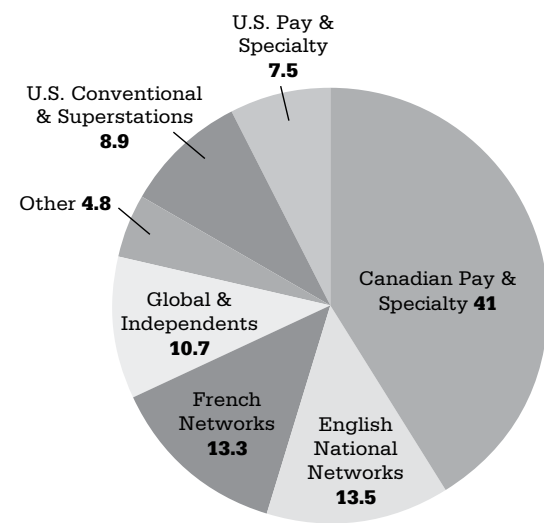
BPM:TV is a dance channel featuring high energy music videos, club openings, interviews and fashion.

BOLD is a 24-hour English-language digital television service with drama and comedy performing arts and exclusive coverage of sporting events.

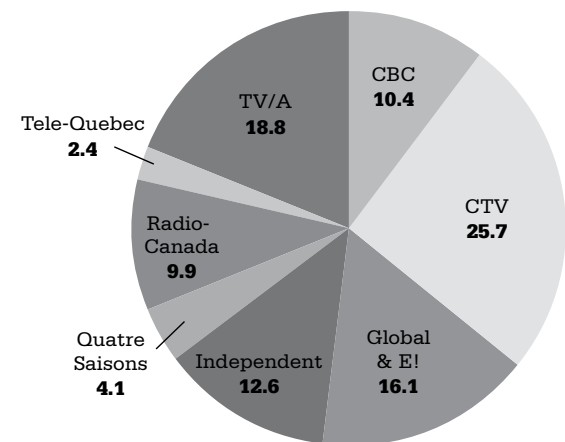
BOOK TELEVISION is Canada's only television channel devoted to words, spoken, written or wired.

CASINO AND GAMING TELEVISION (CGTV) CANADA A television network entirely devoted

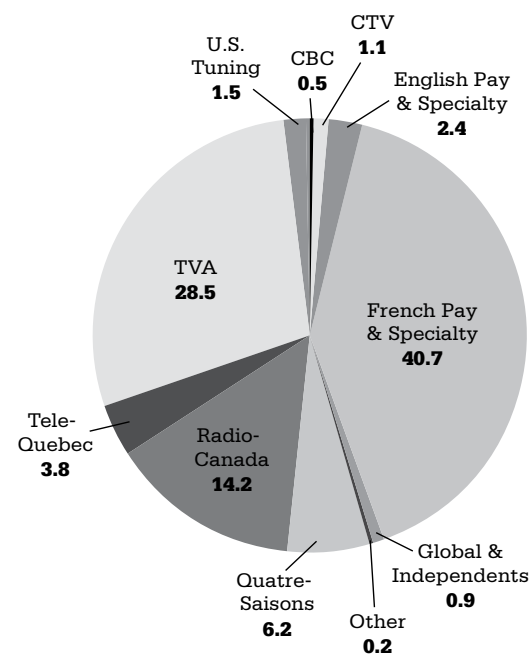
Viewing habits of Canadians 2+ by Station Groups, Share of Hours Tuned
TOTAL CANADA MON - SUN 6A-6A



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
TOTAL CANADA MON - SUN 6A-6A



to the casino and gaming lifestyle, **COSMOPOLITAN TV** Targeting women 18-34, Cosmo TV airs comedy, drama, relationship and reality programming. Like the magazine, the focus for CosmoTV is men, sex and relationships.

COURT TV CANADA 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 DejaView offers TV classics from the '70s and '80s.

DISCOVERY CIVILIZATION CHANNEL explores ancient cultures and modern civilizations.

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

DISCOVERY KIDS offers children of all ages informative and entertaining programming with an emphasis on action, adventure and the environment.

DISCOVERY HEALTH CHANNEL (DHC) Programs about medical science.

DRIVE IN CLASSICS A movie channel that airs drive-in movies of the '50s, '60s and '70s.

DOCUMENTARY is a 24-hour English-language digital television service delivering Canadian and international docs, films and series.

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

FASHIONTELEVISIONCHANNEL is a 24-hour, English-language fashion channel dedicated to the world of art, architecture, photography and design.

FINE LIVING is dedicated to providing information to help people find the most rewarding ways to spend their time and money.

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

G4TECHTV is a 24-hour lifestyle network dedicated to delivering the latest in gaming, technology and entertainment.

GAME TV For Canadians who love to play and watch games, GameTV provides programming and online options including classic game shows, reality programming, non-sports gaming and game-related movies and documentaries

GOLTV is a 24-hour sports network dedicated exclusively to soccer.

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

IFC (INDEPENDENT FILM CHANNEL) IFC is a TV channel devoted to uncut, indie films.

IDNR-TV NATURAL RESOURCES TELEVISION airs content about the extent, preservation and management of Canada's resources.

JOY TV offers multi-faith programming with family-friendly entertainment.

LEAFS TV Featuring the Toronto Maple Leafs pre- and regular-season games, pre/post shows and other Leafs-related content.

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

MOVIEOLA Action, drama and comedy short films.

MOVIE TIME is a digital channel with more than 250 movie titles each month.

MTV2 MTV2, for Canada's 12-24s, features music and celebrity programming.

MUCH LOUD delivers hard music—alternative, metal and punk music videos, featured alongside artist interviews, specials, classic archival material and up-to-the-minute concert info.

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

MUCHVIBE features contemporary urban music programming.

MYSTERY Mystery TV is the home of suspense and crime dramas.

NATIONAL GEOGRAPHIC National Geographic Channel's programming explores the exotic, natural world.

NHL NETWORK NHL Network provides 24-hour coverage of hockey, both on the ice and off. Programming includes live games, highlights, news and special events.

ONE: BODY, MIND & SPIRIT CHANNEL Focusing on natural health and personal growth.

OUT TV National gay and lesbian network featuring programming specifically for the gay and lesbian community. Includes drama, sitcoms and real-life programming.

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

RAPTORS NBA TV Delivers Raptors live pre- and regular-season games, pre/post shows and other Raptors/NBA related content, and over 150 NBA games from around the league.

SCREAM is a specialty television service dedicated to thriller, suspense and horror programming, 24 hours a day.

SEXTV: THE CHANNEL A mix of informative, educational and cutting-edge features about the human sexuality experience.

SHOWCASE ACTION features uncut action programming.

SHOWCASE DIVA features movies aimed at women.

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

SPORTSNET HD Available through digital subscription. Sportsnet Pacific HD, Sportsnet West HD, Sportsnet Ontario HD, Sportsnet East HD.

TELETOON RETRO (English) Features classic

animation.

THE CHRISTIAN CHANNEL Canada's nationally licensed digital television service for Christian viewers.

THE FIGHT NETWORK Combat sports programming including mixed martial arts, boxing, wrestling, kickboxing and other sports.

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

TRAVEL + ESCAPE features programs that highlight the most exotic and luxurious experiences the world has to offer.

TSN2 brings Canadian sports fans a lineup of major league sports action.

TVLAND CANADA is devoted to providing viewers a range of familiar TV favourites.

WILD TV Hunting, fishing and environmental programming.

WFN (WORLD FISHING NETWORK) Dedicated to every aspect of angling and sport fishing, including saltwater and freshwater fishing, professional competitions, expert advice, international fishing competitions, travel destinations and conservation.

DIGITAL NETWORKS - FRENCH

ARGENT A digital 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 A digital channel serving the public interest by promoting the fight against crime and public safety.

LES IDEES DE MA MAISON is a digital channel that focuses on renovations, decoration, cooking, gardening, D.I.Y. and the art of living.

MYSTÈRE offers a wide range of Canadian and foreign series geared at crime thrillers, action and suspense.

PRISE 2 A channel that includes television and great cinema classics series from Quebec and American series that have aired at least 15 years ago.

RIS INFO SPORTS is dedicated to round-the-clock sports coverage.

TÉLÉTOON RETRO (French) Features classic animation.

PAY AND SPECIALTY SERVICES

PAY TV LICENSEES

Canada is served by nine pay-TV networks, all of whom broadcast 24/7 commercial-free programming.

ENGLISH LANGUAGE

HBO
MOVIE CENTRAL
FAMILY CHANNEL
PLAYHOUSE DISNEY

THE MOVIE NETWORK
MPIX

FRENCH LANGUAGE
SUPER ECRAN
CINEPOP
ENCORE AVENUE

PAY PER VIEW/ ON DEMAND

VIEWERS CHOICE
SHAW PAY-PER-VIEW
VU!-NATIONAL (BELL EXPRESSVU)
CANAL INDIGO
ROGERS

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

Market	2+ Population (000)	Specialty/Pay TV Canada + US		Digital Specialty Canada		VCR/DVD Reach (%)	2+ TVs (%)	Penetration (%)				
		Reach (%)	Share (%)	Reach (%)	Share (%)			Cable	Satellite	PVR	VCR	DVD
Atlantic/Atlantique												
St. John's-Corner Brook	444	78	35	16	4	11	80	71	27	5	54	70
Charlottetown	141	74	33	19	3	18	66	46	45	7	57	76
Sydney-Glace Bay	141	79	32	18	3	11	76	58	39	5	51	70
Halifax	662	78	34	19	3	23	70	66	27	12	55	74
Saint-John-Moncton	608	77	32	25	3	18	60	48	47	11	54	70
Carleton	146	78	28	13	2	13	40	55	40	3	47	61
Québec												
Rim.-Mat.-Sept-Iles	150	82	27	14	1	10	72	67	31	7	51	65
Rivière-du-Loup	133	78	27	13	2	11	64	59	36	6	52	64
Saguenay	267	81	30	14	2	19	74	66	32	12	53	71
Québec	1,048	75	27	11	1	22	69	6	26	11	54	71
Sherbrooke	559	73	28	11	1	18	59	56	32	8	58	73
Montréal	4,538	69	27	10	1	17	63	58	29	9	55	73
Montréal-English		67	30	24	5	21	60	55	31	10	62	71
Montréal-French		70	26	7	1	17	64	67	20	8	58	72
Trois-Rivières	290	76	25	13	1	13	70	62	30	7	56	65
Rouyn-Noranda	141	78	30	13	2	17	66	59	34	8	53	69
Ontario												
Toronto-Hamilton	7,037	80	36	15	3	5	72	79	18	10	63	73
Ottawa-Gatineau	1,405	75	32	19	3	26	67	61	30	15	55	77
Ottawa-Gatineau Anglo		75	33	21	3	28	67	58	32	17	57	79
Ottawa-Gatineau Franco		75	31	13	2	20	67	69	25	10	49	71
Pembroke (CM)	99	76	33	30	5	19	67	19	73	10	53	70
Kingston		76	34	27	5	22	65	37	53	10	61	75
East Central Ont.	723	78	33	29	5	21	68	36	55	9	62	77
Peterborough		79	34	30	5	20	68	38	53	8	61	77
Barrie	472	76	34	23	5	25	66	50	42	13	57	74
Kitchener-London	1,931	76	34	24	4	25	64	58	33	13	59	76
Kitchener		76	35	23	4	25	65	62	30	14	58	76
London		76	34	26	4	26	64	57	34	12	60	76
Windsor	406	63	30	20	4	24	75	54	24	7	64	78
Sudbury-Timm.-N. Bay / S.S. Marie	520	81	43	21	4	18	70	51	44	8	58	76
Thunder Bay	150	81	43	21	4	18	72	56	38	11	59	76
Kenora	36	84	41	29	5	22	64	44	55	6	58	77
Manitoba												
Brandon	127	70	36	23	4	16	55	37	47	7	57	70
Winnipeg	933	78	37	24	5	26	69	68	23	14	60	75
Saskatchewan												
Yorkton	81	79	36	31	5	9	52	28	63	8	59	69
Regina-Moose Jaw	303	81	40	24	4	27	70	67	26	16	57	73
Saskatoon	317	75	35	27	5	24	68	57	32	11	57	73
Prince Albert	107	78	35	34	6	21	55	31	60	10	59	73
Alberta												
Medicine Hat	78	76	38	21	4	28	66	52	39	15	57	77
Calgary	1,495	76	32	13	2	27	72	67	26	14	61	78
Red Deer	245	77	37	23	4	20	61	36	55	11	53	74
Lloydminster	86	77	36	32	6	20	55	21	70	8	57	75
Edmonton	1,553	77	35	19	3	29	63	56	36	15	52	77
Br.Col./Col.-Brit.												
Okanagan-Kamloops	577	76	35	16	3	19	60	60	33	16	63	77
Terrace-Kitimat	70	73	34	24	4	22	51	44	44	8	55	75
Pr. George-Terrace-Kitimat		74	35	23	4	23	52	47	43	11	58	77
Prince George	107	75	36	23	4	23	53	48	42	12	60	78
Vancouver-Victoria	3,355	77	32	9	5	24	62	86	8	10	63	76
Dawson Creek	60	71	40	25	6	25	45	40	48	13	56	74
Total Canada	32,663	74	27	18	3	19	64	65	27	12	57	74

Source: BBM Canada Fall 2008 Sweep Survey

Television Data Sources

BBM CANADA/ SONDAGES BBM

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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; its data is the currency on which TV airtime is bought and sold in Canada. BBM also has offices in Montreal, Richmond and Moncton.

(Nielsen Media Research partnered with BBM to measure TV audiences until the expiry of the joint venture agreement at the end of August 2009.)

TELEVISION 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. Viewing is recorded in 15-minute increments from 6 a.m. to 2 a.m. Eight major markets are measured nine weeks out of the year and 30+ smaller markets are measured seven weeks a year.

PPMs are used to measure TV audiences in the four largest markets (Toronto, Vancouver, Montreal French and Calgary) and for networks, every hour of every day of the year. 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 can be reported in increments as small as a single minute.

TV REPORTS

BBM produces a number of different reports analyzing various aspects of TV viewing. *Market books* contain current audience ratings and share data, for several demographic groups, on central and extended markets, as well as full-coverage data for home market stations. *The Reach Book* reports TV station reach and share information for six broad demographic

groups in all BBM measured areas, organized by area and member station.

The TV Backgrounder 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 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 television viewing habits in Canada, in graphic form and detailed national TV viewing information in table form.

Further TV reports are available from BBM on a custom basis, including top-rated programs, post office reference guide and the specialty station market breakout.

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Fax: (905) 475-7296
E-mail: info.canada@nielsenmedia.com
nielsenmedia.ca

EASTERN CANADA

1111 Boul. Dr. Frederik-Philips,
Bureau 505
St-Laurent, PQ H4M 2X6
Phone: (514) 333-1416
Fax: (514) 333-1526

Nielsen Media Research provides:

ADVERTISING INTELLIGENT SERVICES

Ad expenditures, GRP data and creative tracking services. Its advertising expenditure estimates are available for television (network and spot), radio, magazines, daily newspapers and out-of-home.

CREATIVE TRACKING SERVICES

Copies of advertising executions from television, radio, select magazines and newspapers in Canada. All creative placements of all major television stations and specialty networks across the country are monitored. Nielsen Media Research's library of broadcast creative

encompasses everything back to 1977—about 500,000 commercials.

TARGET AUDIENCE ANALYSES

Advertisers and their agencies use Nielsen Media Research's audience analyses and applications to estimate the future performance of television shows, to execute television buys and to measure the performance of campaigns.

TELEVISION BUREAU OF CANADA (TVB)

TORONTO OFFICE

160 Bloor St. E., Suite 1005
Toronto, ON M4W 1B9
Phone: (416) 923-8813
Toll Free: 1-800-231-0051
Fax: (416) 413-3879
E-mail: tvb@tvb.ca
tvb.ca

MONTREAL OFFICE

550 Sherbrooke St. W., Suite 980
Montreal, QC H3A 1B9
Phone: (514) 284-0425
Fax: (514) 284-0698
E-mail: lgroleau@tvb.ca

TVB is a resource centre for its 150-plus members—Canadian television stations, networks, specialty services and their sales representatives. Resources include media and television research, business category information, TVBasics (a compendium and reference guide on television) and the Bessies and Retail Commercial Awards competitions. Telecaster, a body within TVB, issues clearance numbers for all advertising on subscribing stations.

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.

A MESSAGE FROM

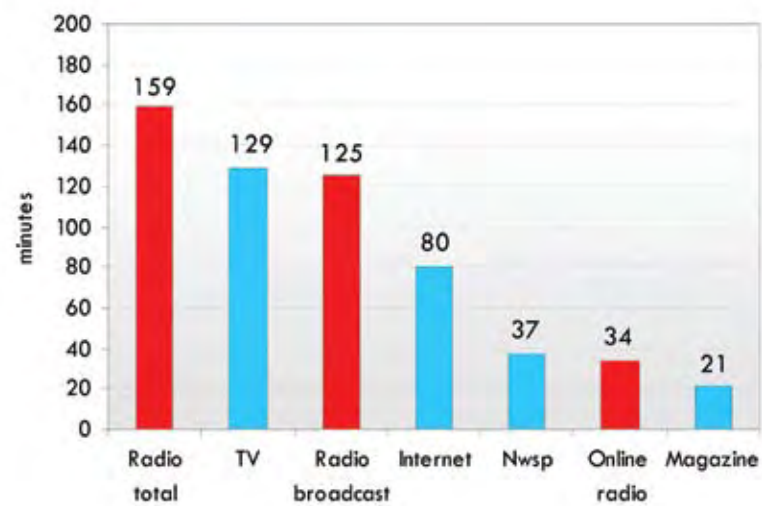


MARKETING BUREAU

RADIO PLAYS A STRONG ROLE IN THE DAILY LIVES OF CANADIANS.

As our lives grow busier and more active, radio is always available at the push of a button or a click of the mouse. A constant companion that provides effortless entertainment and information, radio is not demanding of the listener's time, it simply adapts to their lifestyle. That is why adult Canadians spend more time with radio during a typical work day than any other medium.

ADULTS 18+ TIME SPENT WITH MEDIA -TYPICAL WORKDAY



Source: 2009 Foundation Research Study

CURRENT RESEARCH STUDIES DEMONSTRATE RADIO'S VERSATILITY AND EFFICACY.

- Radio reaches 81% of adults daily (BBM)
- The 2009 Foundation Research study reports that of all the major media, radio and the internet have the highest percentage of adults reporting that their time spent is equal or greater than the previous year
- Adding radio to a print or TV campaign increases awareness and brand preference (2005 RAEL Research)
- 36% of adults listen to radio while online; 45% of adults indicate that a radio ad prompted them to search the web for more information (2009 Foundation Research)

PPM AUDIENCE DATA WILL INCREASE YOUR RADIO INTELLIGENCE

Portable People Meter (PPM) will provide audience data for radio in the top 5 markets across Canada. Radio station audiences will be measured continuously by the minute allowing radio planners, buyers, sellers and programmers to gain greater insight to consumer tuning patterns. This means more efficient radio campaigns, improved radio station content and the ability to reach the right person at the right time.

NEED MORE INFORMATION?

The Radio Marketing Bureau is Canada's premier marketing and resource centre for radio advertising. Our mandate is to inspire and educate the advertising community about radio's power and effectiveness in achieving business goals. Visit our website at www.rmb.ca.

Radio

Distribution

Commercial radio stations	649
HHs with radio	99%

Consumption

1 week reach	93%
Avg 18+ hours per week	19

GENERAL INFORMATION

There are 1238 over-the-air Canadian radio services in Canada: 919 English-language, 286 French-language and 33 other languages. Of the private commercial stations, 184 are AM and 465 are FM. (Source: CRTC Broadcasting Policy Monitoring Report 2007)

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 demographic

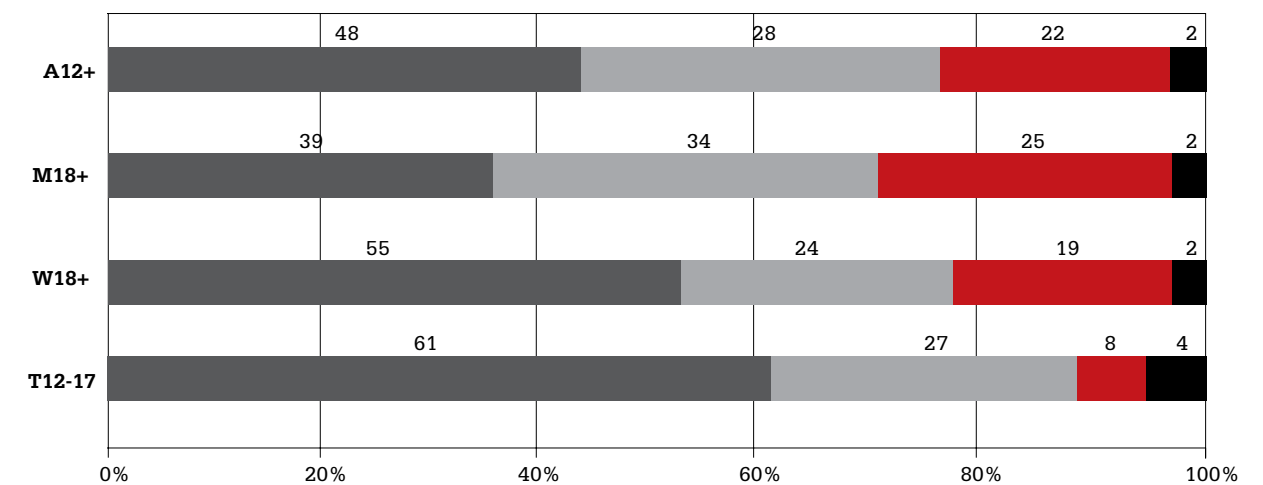
Canada	REACH			SHARE		
	All (%)	AM (%)	FM (%)	AM (%)	FM (%)	Misc. (%)
12+	91	31	81	21	77	2
Women 18+	93	31	83	20	78	2
Men 18+	92	36	81	22	75	3
Teens 12-17	79	11	76	7	92	1

Source: BBM S4 2008, Mo-Su, 5a-1a

Time Block	AUDIENCE COMPOSITION BY DAYPART (%)			
	Women 18+	Men 18+	Teens	Total
Breakfast Mo-Fr 6-10a	48	48	4	100
Midday Mo-Fr 10a-4p	50	49	1	100
Drive Mo-Fr 4-7p	46	50	4	100
Evening Mo-Fr 7p-12a	44	48	8	100

Source: BBM S4 2008, National, AQG Audience

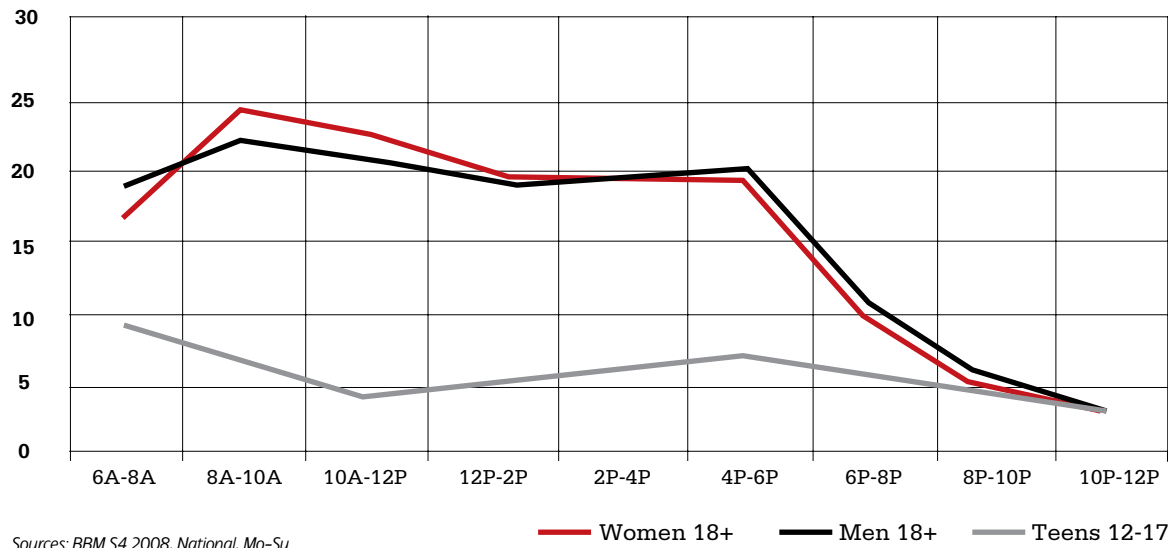
PERCENTAGE OF LISTENING BY LOCATION



Source: BBM S4 2008, National, Mo-Su, 5a-1a, AQH Audience

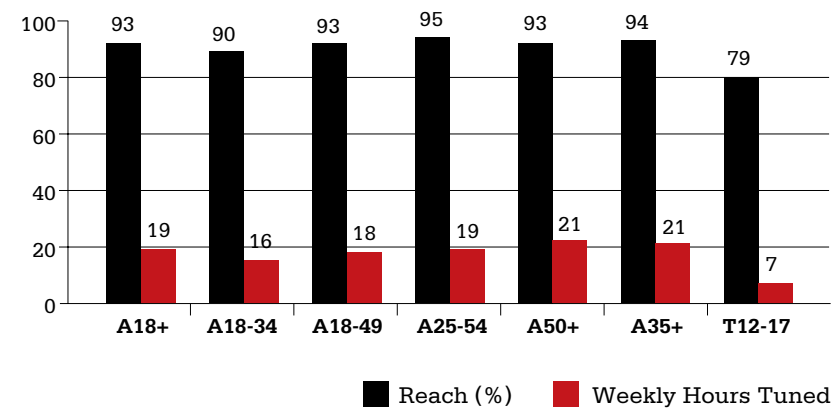
■ Home ■ Vehicle ■ Work ■ Other

AVERAGE QUARTER-HOUR RATINGS BY DAYPART



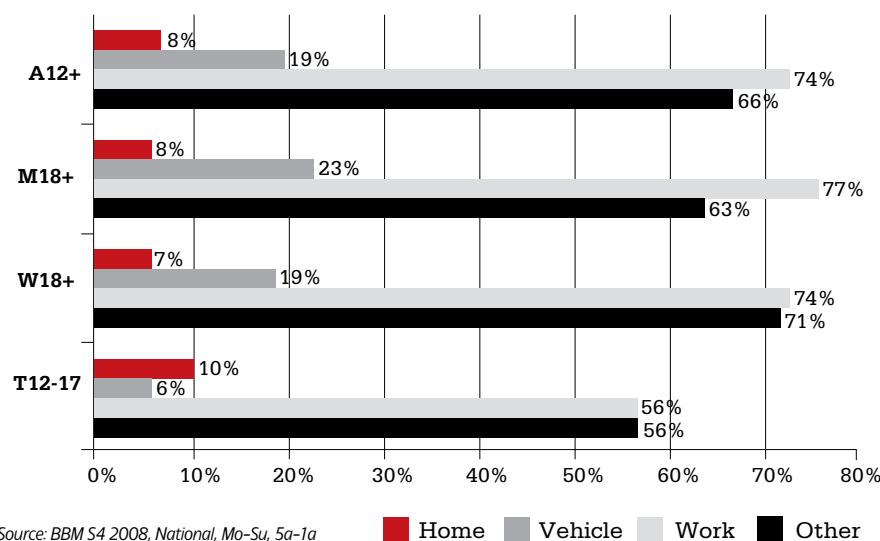
Sources: BBM S4 2008, National, Mo-Su

WEEKLY REACH & HOURS TUNED BY MAJOR DEMO



Source: BBM S1 2008, National, Mo-Su, 5a-1a

PERCENT WEEKLY REACH BY DEMO AND LOCATION



Source: BBM S4 2008, National, Mo-Su, 5a-1a

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 an ROS (run of schedule) basis or against a specific daypart.

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 (39%).

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 a consumer is exposed to 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

Bookings/Cancellations

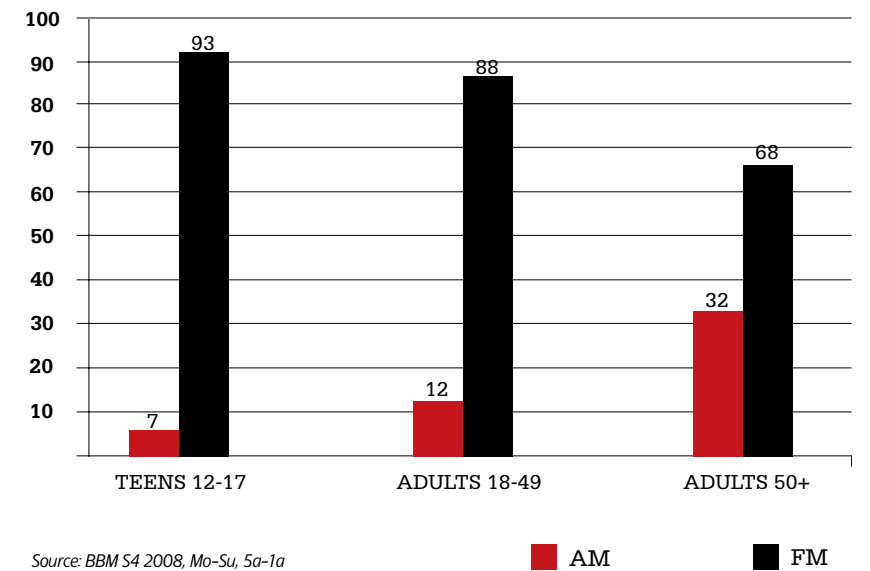
Most radio stations provide the opportunity to sponsor specific programming features (e.g. news, sports, traffic). Additionally, discounts for long-term bookings or volume are generally offered. Demand for radio airtime has increased dramatically over the past few years and this has precipitated a "demand-driven 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 offer not only brand campaign commercials, but will also create promotions for advertisers. Promotions can be as simple as product giveaways during station-owned features or as big as an advertiser-specific promotion. Promotions generally have some type of cost associated with them and the advertiser will need to provide pricing for the listeners. Promotions can air with a brand sell campaign (30-second spots) or can air by themselves.

AM/FM SHARE OF TUNING BY AGE GROUP



Source: BBM S4 2008, Mo-Su, 5a-1a

highest peak is early morning before school, with a secondary peak in late afternoon. Teen tuning drops off much less 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 Rogers, Corus and Standard has shown a minor decrease while CBC's share has shown a slight increase. CHUM's share has remained the same. Corus' and Standard Radio's share of tuning has declined slightly.

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. Corus showed the largest increase in share at 7%.

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.

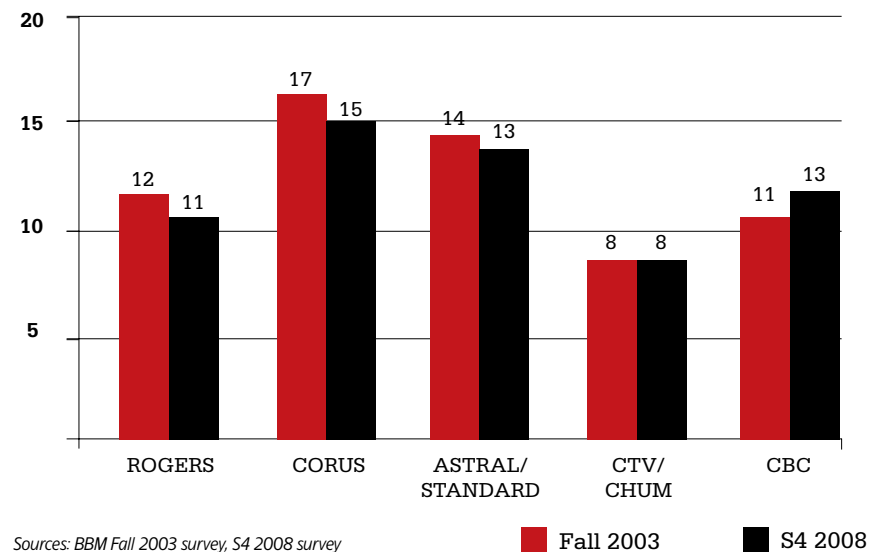
SYNDICATED RADIO

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 (30 or 60 seconds long) that are advertiser-specific, to air through their roster of radio stations. Other broadcasters offer traffic tags and targeted sponsorships on a national or provincial basis. Major syndicators include Orby, Skywards Traffic Network, Canadian Traffic Network and Deep Sky.

SATELLITE RADIO

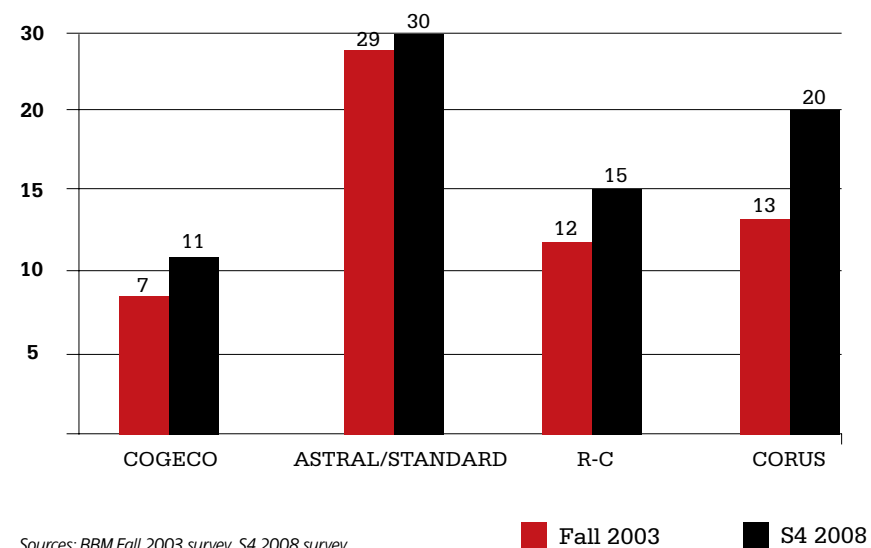
Satellite radio arrived in Canada in November 2005. There are two major players selling satellite radio service in Canada: privately owned Sirius Canada (CBC,

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

Sirius and Slight Communications) and publicly owned XM Canada (XM and CSRI). Although XM and Sirius merged in 2008 in the U.S., they continue to compete with each other in Canada.

Both companies have concluded agreements with various Canadian automotive partners to have satellite radio installed in vehicles. Sat-

ellite radio will also be expanding its market through carriage on cable, direct-to-home (DTH) and mobile wireless carriers. As a result, this will place satellite radio services in direct competition with pay audio for its target audience. (Source: CRTC Broadcasting Policy Monitoring Report 2007)

Satellite radio is commercial-free and is sup-

ported through subscriber fees. Some news/talk formats may eventually offer advertising time on a limited basis. Since its launch, satellite radio has had little measurable impact on terrestrial radio and single-digit penetration. It may force terrestrial stations to streamline their programming to eliminate clutter and become more specialized in order to compete.

Radio Data Sources

BBM CANADA/SONDAGES BBM

Head Office – Toronto
1500 Don Mills Road – 3rd floor
Toronto, Ontario M3B 3L7
T: 416.445.9800
F: 416.445.8644
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; its data is the currency on which radio airtime is bought and sold in Canada. BBM also has offices in Montréal, Richmond and Moncton.

Radio Audience Measurement

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

PPMs were first used to measure radio audiences in Montreal beginning December 2008, and are scheduled to expand to measure Toronto, Vancouver, Calgary and Edmonton effective September 2009. PPMs are small pager-like devices carried by a representative panel of persons age 2+. They passively record exposure to radio programmes and advertisements by picking up inaudible codes embedded in the broadcasts. PPMs measure radio tuning every hour of every day of the year and data 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 MARKET/REGIONAL REPORTS contain current audience ratings, share and trend data for each reported radio station. This information is provided for several age/gender groups and sales and programming time periods, as well as individual 15-minute periods throughout the week and weekend. Each radio station's audience is also profiled by occupation, education,

language, and other characteristics.

THE CENTRAL MARKET REACH REPORT provides an overview of all measured Canadian markets, showing top-line reach and share of hours for all reported radio stations.

THE COUNTY REACH REPORT provides top-line information on station reach and share of hours tuned for all counties, regional districts, and census divisions in Canada.

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. This reference book provides a picture of radio tuning habits, both during the most recent calendar year and over the past five years.

THE RADIO GEOGRAPHICAL REFERENCE GUIDE contains detailed provincial and market maps, 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) contained information of 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 & policy changes, five year listening trend, quintiles trended over time and sample size & return rates.

RADIO MARKETING BUREAU (RMB)

175 Bloor St. E., Suite 316, North Tower
Toronto, ON M4W 3R8
Phone: (416) 922-5757
Toll Free: 1-800-ONRADIO (667-2346)
Fax: (416) 922-6542
E-mail: info@rmb.ca
rmb.ca

The Radio Marketing Bureau is the prime resource center for radio advertising in Canada. The RMB's research department offers a comprehensive marketing and media resource library as well as the RMB/BBM RTS (return-to-sample) study and radio survey qualitative data.

Broadcast Commercial Acceptance

BROADCAST COMMERCIAL ACCEPTANCE

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

GENERAL RULES

- All TV commercials should have Telecaster approval. Please check with the Telecaster Services of TVB for guidelines, rules, regulations and associated costs. Go to: tvb.ca
- CBC, Newsworld, Radio-Canada and RDI require all commercials be submitted to CBC Advertising Standards/Bureau du Code Publicitaire. Go to: <http://cbc.radio-canada.ca>.
- Advertising Standards Council (ASC) reviews all prescription and non-prescription drug advertising (including natural health products) directed to consumers. This ensures that all regulatory requirements are met for Health Canada. Go to <http://adstandards.com>

CATEGORIES WITH SPECIFIC RULES

- All advertising to children must be cleared through Advertising Standards Canada (ASC) Clearances Services to ensure that the commercials adhere to applicable legislation, regulations, and/or sectoral codes and guidelines of the Broadcast Code for Advertising to Children. Telecaster will only review after ASC has approved the commercial.
- All food and non-alcoholic beverage advertising must comply with the Guide to Food Labelling and Advertising, plus the Food & Drugs Act and Regulations.
- All beer and alcohol advertising must comply with the Code for Broadcast of Advertising Alcoholic Beverages.
- 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.
- Closed Captioning messages are cleared by the individual networks/stations. Except-

tion to the rule is when the CC message contains a sell line, special offer, sales or product cost. In this case, Telecaster will be the clearing house.

- All commercials pertaining to gambling (Canadian Indian Reserves, Bingo Parlours or legitimate gambling casinos) 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.
- Movies, videos and video games have time restrictions dependent on the content. Each commercial for video games must have an ESRB rating code before a Telecaster number can be issued.
- Personal Products (feminine hygiene, laxatives, personal lubricants and haemorrhoidal) must also comply with Telecaster approvals. Due to sensitive nature there may be scheduling restrictions.
- Condom advertising must deal only with the issue of disease prevention with education as the primary message. Visual must be responsible and sensible. It cannot promote casual sex and/or promiscuity nor can it mention contraception.
- All Direct Response advertising must clearly show the cost (including U.S. or Canadian funds, applicable taxes and shipping and handling), as well as purchase terms. Compliance with Phone Service Guidelines is also mandatory, as well as all other telecaster guidelines.
- Phone Service commercials also have a number of guidelines. They must display a high standard of sensitivity to public opinion. Refer to the Objectives Guideline and the Sexual Innuendo Guideline in Telecaster criteria.
- Comparative advertising must represent the truth. Telecaster has numerous guidelines that must be followed.
- Contests and prizes must abide by the Can-

adian laws. Telecaster will require a letter from the advertiser/agent confirming that positive legal advice was obtained.

- 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.
- Issue and Opinion advertising also has a number of criteria to follow. All must have Telecaster approval.

CLEARANCE ORGANIZATIONS

Advertising Standards Council (ASC)
ASC is the Canadian advertising industry's self-regulatory body that ensures the integrity and viability of advertising.

It administers the Canadian Code of Advertising Standards, provides consumers with an accessible mechanism to submit a complaint about an advertisement, reports on consumer complaints and provides the ad industry with a confidential mechanism to resolve competitive disputes about advertising.

ASC provides the industry with an objective, independent, fee-based advertising copy review service to help advertisers working in specific categories to comply with pertinent laws and regulations. All advertising for alcoholic beverages, consumer drugs, cosmetics, food and non-alcoholic beverages and children's advertising are reviewed by ASC.

Go to <http://adstandards.com> for more information.

CONTACT:

TORONTO OFFICE
Advertising Standards Council
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

BROADCAST CLEARANCE ADVISORY (BCA)

BCA is a bilingual, cost-effective clearing house. It provides copy analysis with the time frame specified and then assigns BCA numbers on the acceptable copy.

They review both English and French materials that are to be submitted under applicable acts, codes and guidelines in any of the following categories:

- Food and non-alcoholic beverages
- Alcoholic beverage broadcast advertising
- Cosmetics, toiletries and fragrances
- Consumer drug products
- Children's advertising (single market only)

"Route to" services include facilitating approvals from the Telecaster Committee and ASC department of the CBC.

CONTACT

Tel: 416-778-5597 or 1-800-387-0644, Toronto 416-952-9096

CBC ADVERTISING STANDARDS BUREAU/RC BUREAU DU CODE PUBLICITAIRE

TV commercials intended for airing on CBC/RC stations 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.

CBC will not accept infomercials.

CBC/RC policies are 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: 416-205-7342
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 and derives its authority of broadcasting from the Broadcasting Act of 1991. The CRTC 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.

- CRTC regulates:
- Canadian ownership/control of all broadcast outlets
- License application and renewal for all broadcast outlets
- Canadian programming content
- Cable TV license applications and renewals
- Cable fee structures (basic service only)
- Program substitution/simulcasting
- Compliance with the Broadcast Code for Advertising Alcoholic Beverages is a condition of broadcast license for all broadcast stations in Canada.

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 COMMISSIONER

Approves all prescription drug advertising to professionals and acts as an advisory for prescription drug advertising to consumers.
Go to 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 1972 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 provides assistance to advertisers regarding general interpretation of guidelines prior to production or telecast.

Telecaster recommends that scripts or storyboards be submitted 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 tvb.ca or from TVB office.

CONTACT

160 Bloor Street East,
Suite 1005
Toronto, Ontario
M4W 1B9
Phone: 416-923-8813
Fax: 416-413-3879
Email: tvb@tvb.ca

A MESSAGE FROM

CANADIAN NEWSPAPER ASSOCIATION



ASSOCIATION CANADIENNE DES JOURNAUX



NEWSPAPERS—DAILIES AND COMMUNITY PAPERS

The Canadian market for newspapers and their sites is significant. Daily and community newspapers remain the largest medium—representing 24% of ad dollars spent in 2008. NADbank finds dailies reach almost half of Canadians each day and print readership has remained stable over the past 5 years. COMbase indicates that community newspapers reach almost three quarters of Canadians each weekday/weekend. And while Canadians are embracing online newspaper sites, approximately 80% of this group also read the print newspaper!

A June, 2009 study undertaken by IPSO-Reid on behalf of the Canadian Newspaper Association found that Canadians turn to newspapers (print or online) MORE often during times of crisis or a major event for trustworthy and reliable information. On key issues, such as the Canadian economy and job losses or Swine flu, Canadians look to newspapers (print or online) 31% and 28% more, respectively, to garner dependable information. Interestingly, while both issues are of interest to all age groups, the Swine flu readership increase is highest amongst 18-34 year olds. And in terms of advertising, 28% more use newspapers or newspaper inserts to find sales, discounts and bargains during challenging economic times.

2010 promises to offer continued innovation from newspapers. Newspaper organizations are branching out more and more, providing information and advertising opportunities on different platforms: online, e-newsletters, mobile and more.

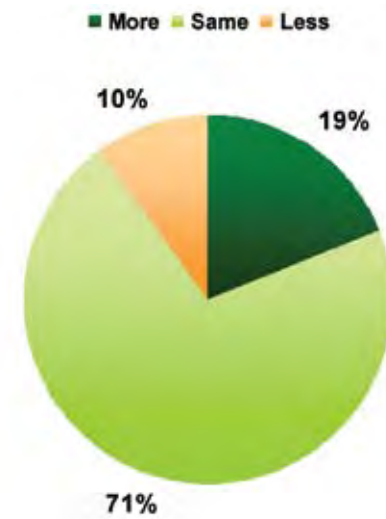
New devices are on the horizon, such as e-readers, which may provide interesting prospects for newspapers and their partners. Video continues to gain ground and Twitter is beginning to play a role in news gathering. Newspapers and their sites are embracing their readers by encouraging their participation in news sourcing and/or offering more occasions for two-way dialogue (e.g. through online chat forums).

Moving forward, newspaper formats may change (based on European trends) and additional colour is likely based on new printing capabilities. Internationally, mobile has been used more due to attractive, flat-rate data plans. If Canadian data plans change, the opportunity to fully utilize mobile will be an exciting option for newspapers.

The Canadian Newspaper Association (www.cna-acj.ca) and the Canadian Community Newspapers Association (www.ccna.ca) offer valuable industry information and tools. Review the sites or feel free to contact us directly, if you require any further information.

CANADIANS READ MORE!

19% indicate they rely on newspapers (print or online) MORE to gain reliable information about a crisis

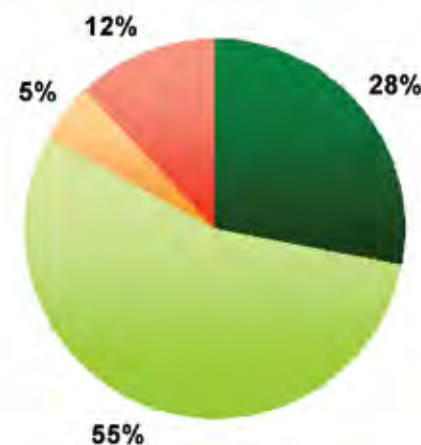


Source: Ipsos Reid, June 2009

NEWSPAPERS FOR SALES

28% MORE, particularly 18-34s & women, use newspapers and inserts to find sales, discounts and bargains during challenging economic times

■ More ■ Same ■ Less ■ Do not read newspapers



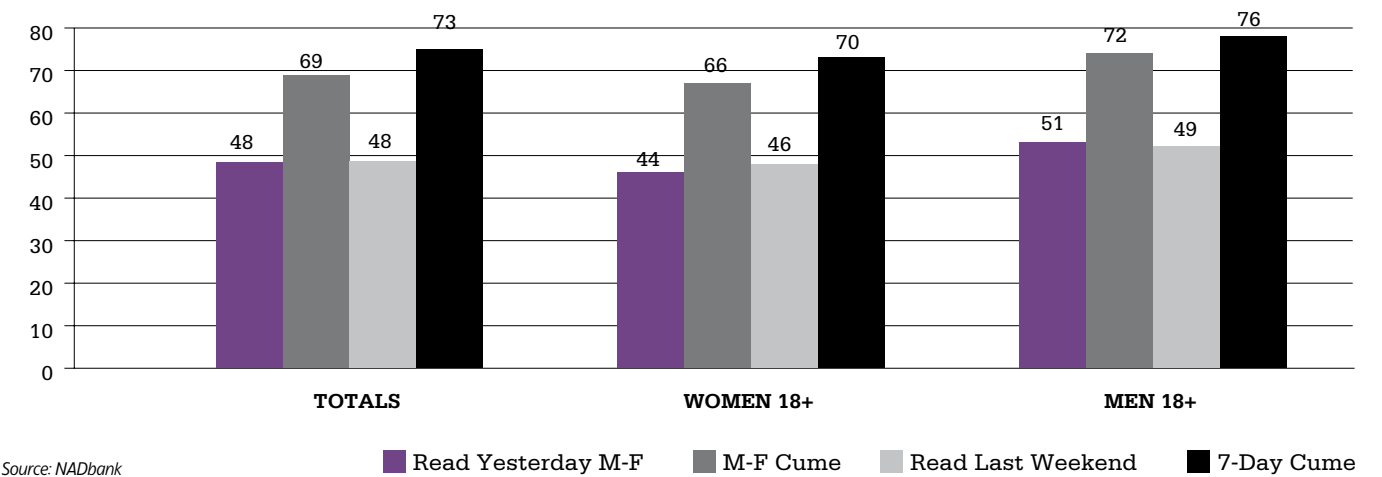
Source: Ipsos Reid, June 2009

	% More	Region	% More
Age			
18-34	34	BC	30
35-54	24	Alberta*	22
55+	27	Sask/ Manitoba*	16
Gender			
Male	24	Ontario	31
Female	31	Quebec	25
		Atlantic*	36

* Caution small base

Daily Newspapers

National Readership: 54 Markets, Adults 18+



Source: NADbank

DISTRIBUTION

Newspaper markets	94
Number of daily newspapers	124
Number of national newspapers	2
Total circulation	6.0 million

Source: CAROnline, May 2009

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 124 daily newspapers in Canada.
- Thirteen are French-language papers, 111 are English-language papers.
- Gross daily circulation represents a household penetration of 45%.
- There are currently 11 free dailies in 6 markets in Canada.
- Newspapers are extending their reach beyond the core printed product and increasing their audience online.
- 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 ver-

tical, vs. columns and lines. At least 3 papers have adopted modular pricing.

There are two basic newspaper formats: **BROADSHEET**

- A broadsheet page ranges from 10 ½ inches to 11 ½ inches wide by 20 ¾ inches to 22 inches deep. Currently a number of papers are in the process of downsizing in response to high newsprint costs.
- There are 73 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 9 ¾ inches to 10 ¾ inches wide and 12 ¼ inches to 14 ½ inches deep. Tabloids are also trimming paper sizes.
- There are 51 tabloids with the number of columns ranging from 5 to 10.
- Full page linage ranges from 1000 to 2000 lines.

DAILY NEWSPAPER CIRCULATION & COST BY REGION

	Atlantic	Quebec	Ontario	Prairies	BC & Yukon	Total
Number of Markets	13	6	35	14	26	94
Number of Dailies	14	13	44	21	32	124
Circulation	359,940	1,234,303	2,682,485	921,080	825,363	6,023,171
B/W Line Rate (\$)	24	64	210	64	83	445
Full Page B/W (\$)	68,142	123,970	487,821	157,027	128,876	965,836
Full Page Colour (\$)	82,182	153,054	562,289	193,359	153,155	1,144,039

Source: CARD Spring/Summer 2009, Daily Newspapers Fast-Track

DAILY NEWSPAPER CIRCULATIONS AND COSTS BY POPULATION GROUP

	1MM+	500M-1MM	100M-500M	50M-100M	Under 50M	Total
Number of Markets	6	3	26	24	35	94
Number of Dailies	29	5	30	25	35	124
Circulation	4,093,744	447,254	932,057	329,567	220,549	6,023,171
Full Page B/W (\$)	520,502	63,567	211,187	86,285	84,295	965,836
Full Page Colour (\$)	609,347	86,712	245,451	100,436	102,093	1,144,039

Source: CARD Spring/Summer 2009, Daily Newspapers Fast-Track

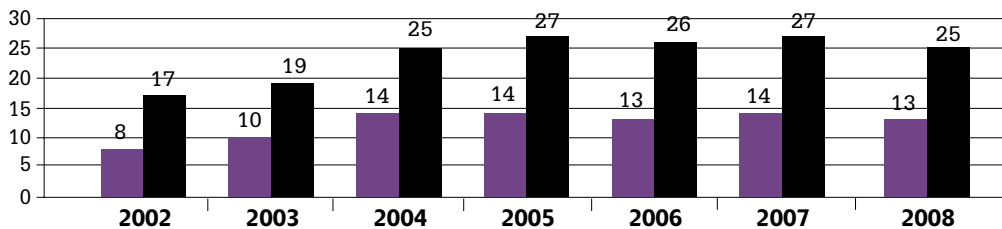
DAILY NEWSPAPER READERSHIP – ADULTS 18+ PROFILES BY REGION (%)

	Atlantic	Quebec	Ontario	Prairies	BC & Yukon	Total
Men	48	48	49	49	49	49
Women	52	52	51	51	51	51
18-24	12	11	12	14	12	12
25-34	18	18	18	20	18	19
35-49	30	30	31	30	30	31
50-54	9	10	9	9	10	9
55-64	15	14	13	12	14	13
65+	16	17	16	14	16	16

Source: NADbank 2008

Weekday Readership of Free Dailies Stabilizing (%)

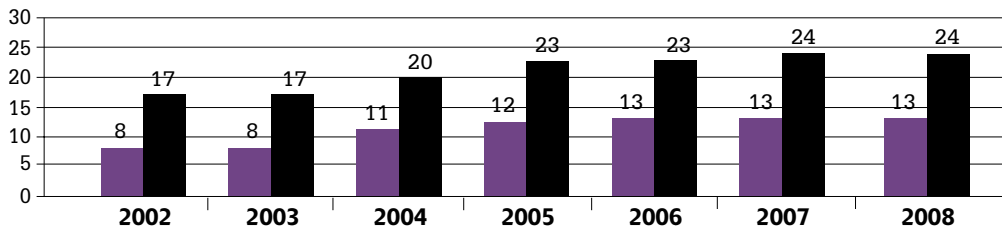
Toronto CMA



Source: NADbank 2008

Weekday Readership of Free Dailies Stabilizing (%)

Montreal CMA



Source: NADbank 2008

Bookings/Cancellations

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.

City Size Publication Detail

1MM+	
Newspaper	Total Circ. (M-F)
Toronto Star	421,709
The Globe and Mail (National)	335,575
Metro Toronto	275,617
24 hours Toronto	270,999
Le Journal de Montréal	267,396
La Presse (Montreal)	200,921
Toronto Sun	195,683
National Post (National)	191,815
Vancouver Sun	166,646
Vancouver Province	160,805
Metro Vancouver	150,000
24 Heures Montreal	145,016
Montreal Gazette	143,851
Métro Montréal	142,925
24 Hours Vancouver	125,940
Ottawa Citizen	124,847
Calgary Herald	121,172
Edmonton Journal	119,129
Edmonton Sun	63,503
Metro Ottawa	60,000
Metro Edmonton	60,000
Metro Calgary	60,000
Calgary Sun	57,207
24 Hours Calgary	50,000
Ottawa Sun	48,369
24 Hours Edmonton	38,375
24 Hours Ottawa	35,085
Le Droit (Ottawa)	34,570
Le Devoir (Montreal)	26,589
Total 1MM+ Markets	4,093,744

500M-1MM	
Newspaper	Total Circ. (M-F)
Winnipeg Free Press	119,933
Le Journal de Québec	102,929
Hamilton Spectator	101,095
Le Soleil (Quebec City)	83,141
Winnipeg Sun	40,156
Total 500-1MM Markets	447,254

100M-500M	
Newspaper	Total Circ. (M-F)
Halifax Chronicle Herald	110,935
London Free Press	82,337
Victoria Times Colonist	69,546
Windsor Star	67,106
Waterloo Regional Record	63,465
Saskatoon Star Phoenix	55,101
Regina Leader Post	49,608
Le Nouvelliste (Trois-Rivières)	42,072
Moncton Times & Transcript	36,832
Saint John Telegraph Journal	33,171
La Tribune (Sherbrooke)	32,040
Metro Halifax	30,000
St. John's Telegram	27,536
St. Catharines Standard	26,624
Thunder Bay Chronicle Journal	26,571
Kingston Whig-Standard	24,815
Sudbury Star	18,643
Peterborough Examiner	18,483
Lethbridge Herald	17,725
Red Deer Advocate	16,001
Kelowna Daily Courier	15,573
Guelph Mercury	13,013
Victoria News Daily	10,000
Nanaimo/Parksville	10,000
News Bulletin Daily	8,000
Barrie Examiner	7,217
Nanaimo Daily News	7,184
Surrey Leader Daily	7,000
Kelowna Capital News Daily	5,500
Abbotsford News Daily	5,200
Sherbrooke Record	4,759
Total 100-500M Markets	932,057

50M-100M	
Newspaper	Total Circ. (M-F)
Le Quotidien (Chicoutimi)	27,121
Cape Breton Post (Sydney)	25,018
Fredericton Daily Gleaner	21,685
Brantford Expositor	21,065
Charlottetown Guardian	20,470
Sault Ste. Marie Star	17,168
Sarnia Observer	16,995
La Voix de l'Est (Granby)	15,543
Niagara Falls Review	15,419
Prince George Citizen	13,979
North Bay Nugget	13,934
Brandon Sun	13,850
Cornwall Standard Freeholder	13,476
Welland Tribune	12,711
Kamloops Daily News	12,655
Belleville Intelligencer	12,503
Chatham Daily News	12,318
Medicine Hat News	12,274
Tri-City/MR/Pitt M Daily (Port Coquitlam)	7,100
Grande Prairie Daily Herald-Tribune	6,634
Comox Valley/Campbell River Record Daily	4,500
Vernon Morning Star Daily	3,500
Kamloops This Week Daily	3,400
Chilliwack Progress Daily	3,200
Fort McMurray Today	3,049
Total 50-100M Markets	329,567

UNDER 50M	
Newspaper	Total Circ. (M-F)
L'Acadie Nouvelle (Caraquet)	20,314
Simcoe Reformer	19,793
Owen Sound Sun Times	15,318
Brockville Recorder and Times	11,886
Stratford Beacon Herald	9,493
Summerside Journal Pioneer	8,907
Timmins Daily Press	8,402
New Glasgow News	7,826
Moose Jaw Times-Herald	7,503
Penticton Herald	7,493
Corner Brook Western Star	7,381
Prince Albert Daily Herald	7,289
Orillia Packet and Times	7,018
Woodstock Sentinel Review	7,000
Truro Daily News	6,704
St. Thomas Times Journal	6,542
Pembroke Daily Observer	6,023
Trail Daily Times	5,224
Alberni Valley Times (Port Alberni)	4,538
Northumberland Today (Cobourg/Port Hope)	4,005
Alaskan Highway News (Fort St. John)	3,725
Prince Rupert Daily News	3,591
Cranbrook Daily Townsman	3,380
Kenora Daily Miner & News	3,205
Peace Arch News Daily (White Rock)	3,200
Nelson Daily News	3,176
Amherst Daily News	3,161
Cowichan Valley News Leader	3,000
Portage La Prairie Daily Graphic	2,571
Whitehorse Star	2,538
Fort Frances Daily Bulletin	2,400
Dawson Creek Daily News	2,200
Port Hope Evening Guide	2,173
Bulkley Valley Northern Daily	1,900
Kimberly Daily Bulletin (Cranbrook)	1,670
Total Under 50M Markets	220,549

Source: CAROnline, April 2008

AD TYPES

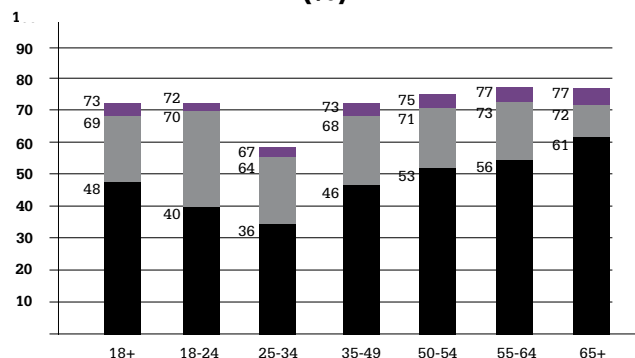
- **ROP COLOUR** Run of Press colour is available in virtually all daily papers. Cost premiums vary by publication and minimum linage requirements range from zero to 1,000 lines.
- **INSERTS** can be carried by most papers. The cost varies according to the number of pages, the size of the insert, paper type and whether it is machine or hand inserted.
- **FLEXFORM** 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'n
\$75M+	47	109
\$50 to \$75M	25	99
\$30 to \$50M	15	95
\$20 to \$30M	8	91
Under \$20M	5	74

DAILY READERSHIP BY EDUCATION		
Highest Level Achieved	%	Index to Pop'n
University Grad+	35	109
Some Post-secondary	34	100
Graduate High School	19	96
Some High School or Less	10	82

Source: NADbank 2008

Daily Newspaper Readership by Age (%)



Source: NADbank 2007

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

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.

AUDIT BUREAU OF CIRCULATIONS (ABC)

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

TORONTO OFFICE

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

MONTREAL OFFICE

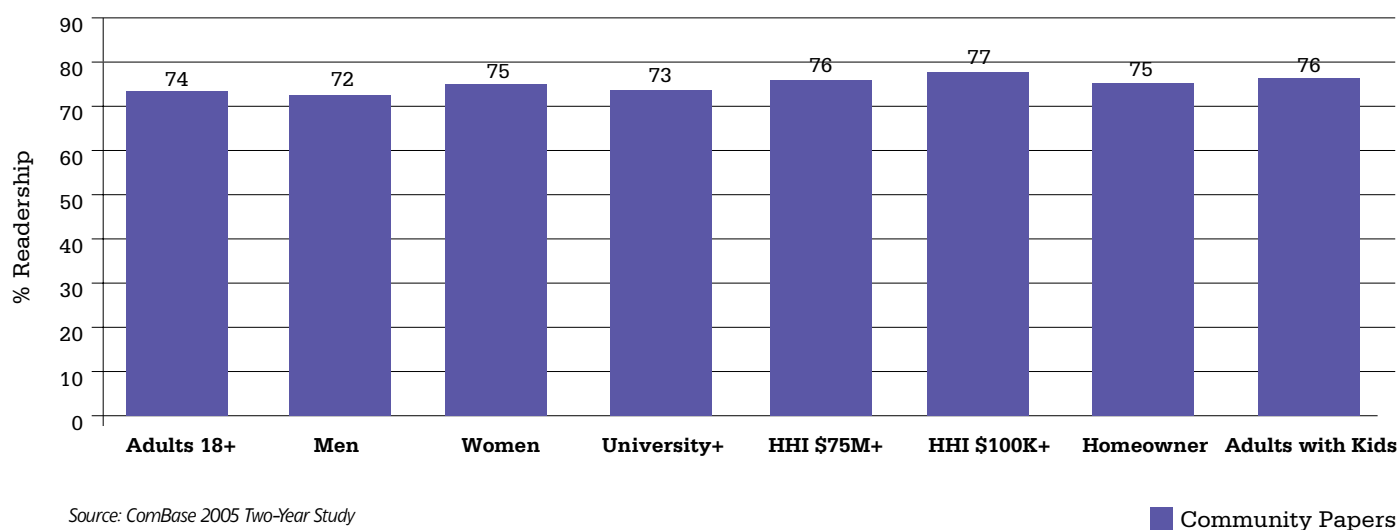
1010 rue Sherbrooke Ouest
Bureau 1800
Montreal, QC H3A 2R7
Phone: (514) 845-0003
Fax: (514) 845-0905

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,

Community Newspapers

Exclusive Readership of Community Newspapers



Source: ComBase 2005 Two-Year Study

Distribution

Number of papers	1,100
Total circulation	17 million

Publishing Days

Wednesday	34%
Friday	23%
Tuesday	15%
Thursday	14%
Monday	6%
Saturday	4%
Sunday	2%
Monthly	1%

Source: ComBase 2005 Two-Year Study; Canadian Community Newspapers Association

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—in key metropolitan areas, rural and remote regions, and all areas in between. 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.

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 (75%) than any other medium.

Community newspapers reach all upscale demographics—professionals, well-educat-

ed, affluent consumers—as well as families with children and home-owners. 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, Hebdom 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.

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 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 are available to members and can be accessed online at accessabc.com, while CCAB data are available at no cost at 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 informa-

tion 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 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 on-line media behaviour, readership of online newspapers, reasons for using community newspapers, flyer usage and a number of life events. Data are expected to be released in December 2009. To learn more about ComBase, visit 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 (CCAB). Hebdos Québec is also a partner of Community Media Canada. For more information visit communitymedia.ca.

A MAJORITY OF ENGLISH-CANADIAN ADULTS AGE 18+ READ THE LAST ISSUE OF THEIR COMMUNITY NEWSPAPER

English 18+	74%
British Columbia	80%
Ontario	69%
Alberta*	76%
Saskatchewan	83%
Manitoba	77%
Quebec (English)	61%
Quebec (French)	66%
Atlantic Canada	67%
Yukon	80%

Source: ComBase 2005 Two-Year Study, StatHebdo 2007 for French Quebec
*Excludes Edmonton
**ComBase 2003 One Year Study

OVER TWO-THIRDS OF ENGLISH-CANADIAN ADULTS AT ALL INCOME LEVELS READ THE LAST ISSUE OF THEIR CANADIAN COMMUNITY NEWSPAPER

HHI < \$30K	69%
HHI \$30 - 49K	75%
HHI \$50 - 74K	76%
HHI \$75K +	76%

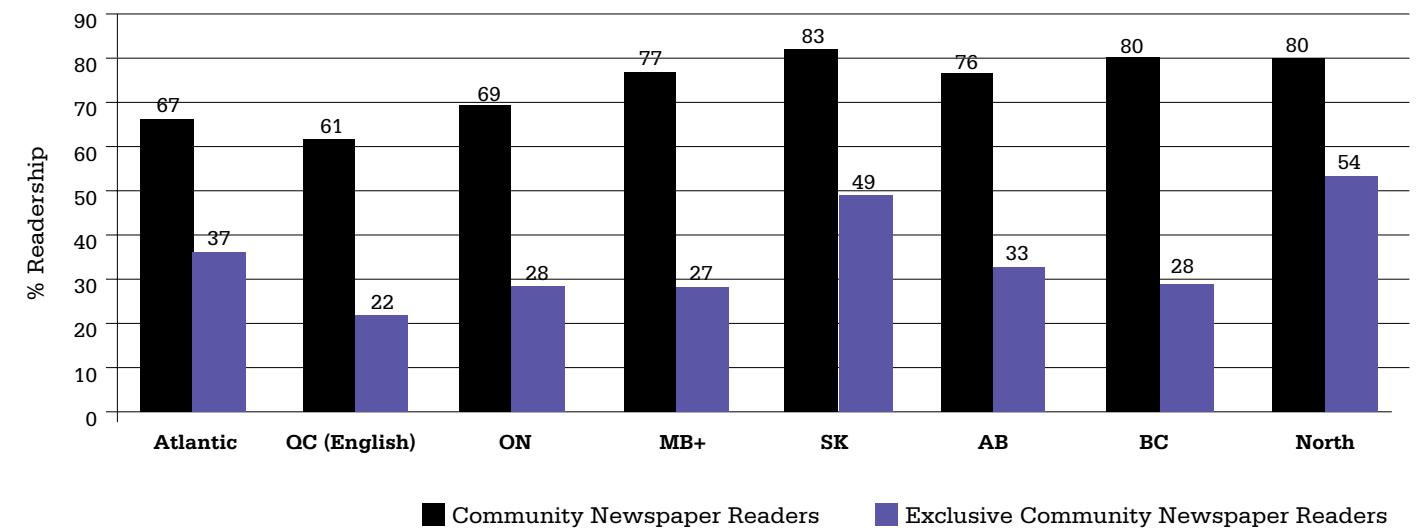
Source: ComBase 2005 Two-Year Study

KEY DEMOGRAPHIC TARGETS 18+

Women	75%
University Education	73%
Home Owners	75%
HHI \$75K+	76%
Households with Kids	76%
Age under 40	70%
HH Size 4+	75%

Source: ComBase 2005 Two-Year Study

ComBase 2005 Provincial Readership Highlights



Source: ComBase 2005 Two-Year Study *2003/2004 Study; **Includes CSD of St. John's and Mount Pearl only.

CCNA Members - Ownership Breakdown

Owner	# of Titles	# of Editions	Paid Circ.	Controlled Circ.	Total Circulation	Av. Circ Per Edition
Independent owners (1 title per owner)	197	203	365,798	1,169,110	1,534,908	7,561
Publishing Groups (43 groups with 2-9 titles)	122	123	167,910	882,676	1,050,586	8,541
Sun Media*	104	119	172,721	1,093,320	1,266,041	10,639
Metroland Media Group	99	141	134,606	4,461,318	4,595,924	32,595
Black Press Group	68	105	63,428	2,235,854	2,299,282	21,898
Glacier Ventures International	51	73	164,807	265,406	430,213	5,893
G.T.C. Transcontinental Group	39	40	82,640	305,854	388,494	9,712
CanWest Global Communications	23	41	18,997	1,474,081	1,493,078	36,417
Great West Newspapers, LP.**	19	20	25,113	185,484	210,597	10,530
Brunswick News	19	20	47,388	108,016	155,404	7,770
Performance Printing	14	14	14	401,795	401,809	28,701
Multimedia Nova Corporation	13	13	3,106	457,379	460,485	35,422
Department of National Defence	6	6	3,054	25,975	29,029	4,838
Total	774	918	1,249,582	13,066,268	14,315,850	15,595

As of April 1, 2009. Source: Canadian Community Newspapers Association.
*Sun Media includes Bowes Publishers and Osprey Media Group
**Glacier Ventures International Corp. is a 50% shareholder of Great West Newspaper Group

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. In fact, StatHebdo is the only media study

that reports products and services usage for 150 different markets. For more information on the readership survey, visit hebdo.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 eight 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, apf.ca.

CCNA Members - Provincial Breakdown

Province	Total Members	Total Editions	Total Paid Circulation	Total Controlled Circulation	Total Circulation	Median	Lowest Circulation	Highest Circulation
BC	115	188	188,260	3,831,711	4,019,971	15,035	641	118,224
AB	113	118	145,537	750,903	896,440	3,995	506	127,593
SK	85	86	122,129	244,098	366,227	1,754	180	29,926
MB	45	46	57,580	323,651	381,231	3,221	787	54,056
ON	315	370	476,638	7,295,893	7,772,531	11,550	280	166,091
QC	21	25	51,707	305,664	357,371	7,408	1,635	64,000
NB	23	24	57,494	123,381	180,875	5,268	2,924	19,048
PE	3	3	5,544	8,020	13,564	5,228	2,313	6,023
NS	30	30	66,757	155,049	221,806	3,908	995	34,480
NL	14	15	44,517	0	44,517	2,868	920	5,203
YT	1	3	8,593	9,555	18,148	5,565	5,159	7,424
NT	6	7	21,461	6,689	28,150	2,322	1,369	9,592
NU	3	3	3,365	11,654	15,019	6,194	1,909	6,916
National	774	918	1,249,582	13,066,268	14,315,850	6,234	180	166,091

As of April 1, 2009. Source: Canadian Community Newspapers Association.

Bookings/Cancellations

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 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.

Community Newspaper Data Sources

CANADIAN COMMUNITY NEWSPAPER ASSOCIATION (CCNA)

8 Market Street, Suite 300
Toronto, ON M5E 1M6
Phone: (416) 482-1090
Toll-free: 1-877-305-2262
Fax: (416) 482-1908
E-mail: info@ccna.ca
communitynews.ca
For advertising: communitymediacanada.ca
or call 1-866-669-2262

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

LES HEBDOS DU QUÉBEC

538 Place St-Henri
Montreal, QC H4C 2R9
Phone: (514) 861-2088/ 1-866-861-2088
Fax: (514) 861-1966

The CCNA represents 700-plus 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

8 Market Street, Suite 300
Toronto, ON M5E 1M6
Phone: 1-800-481-6580
Fax: (905) 780-9469
Mobile: (647) 225-8766
combase.ca

ALBERTA WEEKLY NEWSPAPERS ASSOCIATION

4445 Calgary Trail South, Suite 800
Edmonton, AB T6H 5R7
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

E-mail: communications@hebdos.com
hebdos.com

Les Hebdos du 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).

OFFICE DE LA DISTRIBUTION CE RTI FIEE ODC

1 Place Ville-Marie
Bureau 3000
Montreal, QC H3B 4T9
Phone: (514) 393-5139
Fax: (514) 393-5289
E-mail: info@odcinc.ca
odcinc.ca

A not-for-profit organization, the ODC serves over 190 Canadian publications, most of them in Quebec. Among its services is the verification of the number of copies distributed by each of its members, while assisting their publishers in the maintenance of circulation information.



At the end of the day this is all that matters
82 daily newspapers in
54 urban markets across Canada,
70% of adults 18+

NADbank is a tri-partite organization comprised of daily newspapers, advertising agencies/media buying companies, advertisers, research consultants, government departments and educational institutions.

NADbank (Newspaper Audience Database) is the principal research arm of the Canadian daily newspaper industry. NADbank is an annual study conducted in urban markets across Canada.

NADbank contacts:
Anna Craswell, President
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Lisa Bouthin
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Newspaper Audience Database Inc.
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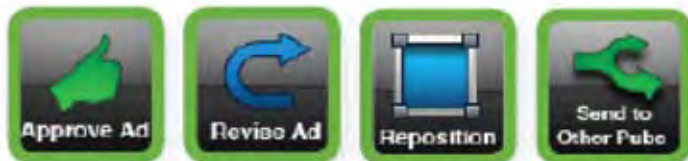
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MAGAZINES CANADA LAUNCHES NATIONAL AD PORTAL FOR MAGAZINES

Magazines Canada AdDirect™ makes it easier for agencies and advertisers to submit advertising files to publishers. AdDirect™, Canada's national web-based magazine ad preflight and delivery portal, streamlines the process making delivery more immediate, efficient and user-friendly.

AdDirect™ automatically evaluates agency or advertiser ad files against publishers' individual specifications to ensure they meet the technical requirements needed to print as intended. And, should the validation process reveal any technical reasons why the ad may not reproduce as expected, AdDirect™ immediately informs you and provides assistance to help make the fix. AdDirect™ validates the ad and delivers it instantly, supplying you with an automatic digital receipt confirming that the ad has been received by the publisher. AdDirect™ receives and processes files 24/7, ensuring they are print-ready, all through one easy-to-use national website. AdDirect™ is a free service for advertisers and agencies.



Using AdDirect™ is as simple as 1-2-3.

1. Visit <https://addirect.sendmyad.com/> to set up your own account and establish your own user name and password.
2. Upload, preflight and review your ad quickly and simply. Just choose a participating publication, select the relevant ad information for your particular ad and click 'Upload' to transport your PDF file.
3. Approve your ad. Once the ad is approved, a PDF/X-1a file is generated and automatically sent to the magazine.

That's it!



FOR MORE INFORMATION about how Magazines Canada AdDirect can work for you, visit www.magazinescanada.ca to access the portal (<https://addirect.sendmyad.com/>), view a portal demo, download a step-by-step User Guide or set up a free account. Contact Gary Garland, Executive Director Advertising Services at ggarland@magazinescanada.ca or call 416-596-5318.

Consumer Magazines

Distribution

Consumer magazines	1250
Business/trade	1050
Annual circulation	770 million

Consumption

1 month reach	84%
1 week reach	67%
Issues read per year	60%
Readers per issue	4.8

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. Although the tough economic climate of 2009 has forced several magazines to close, overall annual readership of magazines is still 107 million and, on average, Canadians ages 12+ read 4 magazines per month.

PMB 2009 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 2009 study, readership information is provided for 63 English and 41 French consumer magazines. Titles being measure for the first time are: Loulou,

Loulou (French), Our Canada, Parents Canada and The Health Journal.

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

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

US SPILL

The degree of spill into Canada from U.S. magazines continues to decrease year over year. In 2008 there were 25 fewer U.S. publications measured with paid Canadian circulation of more than 25,000, compared to 2007.

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

Magazine Name	Total Paid CDN.Circ	Magazine Name	Total Paid CDN.Circ
National Geographic	354,975	National Enquirer	60,812
Cosmopolitan	232,320	Life & Style Weekly	60,582
People	171,783	Shape	59,082
Prevention	158,849	Fitness	57,554
O, The Oprah Magazine	153,711	Glamour	55,174
Woman's World	152,876	Real Simple	53,922
Martha Stewart Living	136,037	J-14	52,025
Men's Health	132,780	Cosmo Girl!	50,835
Women's Health	127,362	Discover	50,321
In Style	124,687	Better Homes and Gardens	48,196
In Touch Weekly	118,671	Vogue	46,248
Endless Vacation	117,245	Playboy	45,992
Sports Illustrated	115,368	Bon Appetit	44,335
Maxim	110,321	M	41,696
First	84,218	Woman's Day	40,727
Star Magazine	80,909	Car and Driver	37,011
US Weekly	79,539	Self	35,892
Family Circle	76,644	Parents	35,476
People Stylewatch	72,827	Teen Vogue	32,438
Vanity Fair	70,310	Martha Stewart Weddings	31,402
Golf Digest	70,286	Ladies' Home Journal	31,981
The Economist (NA Edition)	69,968	Twist	31,255
Seventeen	68,741	Scientific American	30,206
Good Housekeeping	67,211	Fortune (North America)	27,555
Everyday Food	61,423	GQ-Gentlemen's Quarterly	25,959

Source: ABC 2008

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.

Canadian Consumer/Business Magazines: Circulation, Page Rates & Readership: English (measured/reported in PMB 2009 Spring)

English Publications	Magazine Class	1P 4CB Rate (\$)	Circulation (000)	RPC	PMB 2008 ALL 12+ (000) Readership	Male	Female
Alive	Health & Fitness	\$9,500	200	2.7	549	135	414
British Columbia Magazine	General Interest	\$10,835	87	13.0	1135	647	489
CAA Magazine (excludin Manitoba)	General Interest	\$28,887	1484	1.6	2305	1096	1210
CAA Magazine -Manitoba	General Interest		126	1.7	210	86	124
Canadian Business	Business & Finance	\$18,180	93	11.1	1,031	702	329
Canadian Family	Women's	\$11,580	91	9.5	863	242	622
Canadian Gardening	Gardening	\$13,145	156	12.7	1980	662	1318
Canadian Geographic	General Interest	\$16,950	212	17.8	3768	2051	1718
Canadian Health *	Health & Fitness		41	30.3	1244	489	755
Canadian Health & Lifestyle	Health & Fitness	\$16,984	398	6.2	2477	927	1550
Canadian Home Workshop	Homes	\$10,000	117	9.1	1063	704	359
Canadian House & Home	Homes	\$19,853	254	9.3	2361	668	1692
Canadian Living	Women's	\$40,315	516	7.7	3959	1093	2866
Chatelaine	Women's	\$49,400	601	6.3	3768	669	3099
City Parent	Families	\$4,399	130	0.8	108	15	93
Cottage Life	General Interest	\$12,195	71	13.5	956	516	440
Elle Canada	Women's	\$15,900	136	12.5	1699	199	1499
EnRoute	General Interest	\$19,900	154	7.0	1078	664	414
EYE WEEKLY	City & Regional	\$5,890	117	1.8	213	138	75
Famous	Entertainment	\$28,750	623	2.0	1222	571	652
Fashion Magazine	Women's	\$20,970	152	13.3	2028	414	1614
Financial Post Business	Business & Finance	\$20,500	216	5.5	1178	883	295
Flare	Women's	\$22,200	158	9.6	1518	184	1334
Food & Drink	Food & Beverage	\$19,348	526	4.4	2304	904	1400
Glow	Women's	\$22,000	-	-	1057	128	928
Golf Canada	Sports	\$16,764	137	10.3	1415	1086	329
Good Times	Mature Market	\$8,950	158	3.0	478	154	324
Harrowsmith Country Life	General Interest	\$8,500	126	6.1	772	330	443
Homemakers	Women's	\$23,925	395	4.1	1608	302	1306
HOURL	City & Regional	\$9,311	37	2.8	103	59	43
Inside Entertainment	Entertainment	\$12,733	184	8.4	1548	728	821
LouLou (Eng) *	Women's	\$16,308	147	4.7	693	38	655
MacLean's	News	\$36,700	385	6.3	2414	1231	1182
MIRROR	City & Regional	\$3,668	61	2.1	127	83	45
MoneySense	Business & Finance	\$14,545	120	7.0	846	533	312
Movie Entertainment	Entertainment	\$10,300	521	3.6	1888	947	941
NOW	City & Regional	\$5,190	107	3.0	321	184	137
Ontario Golf	Sports	\$5,395	45	5.2	235	194	42
Ontario Out of Doors	Fishing & Hunting	\$8,695	93	6.3	591	411	179
Ottawa Magazine	City & Regional	\$4,335	36	3.8	138	76	62
Our Canada *	General Interest		305	3.3	1016	369	647
Outdoor Canada	Fishing & Hunting	\$10,410	94	16.4	1544	1014	530
ParentsCanada *	Women's		122	9.6	1176	290	886
People	Women's	\$29,215	172	20.7	3560	1086	2473
Professionally Speaking	Education	\$9,090	207	1.4	290	111	179
Profit	Business & Finance	\$18,180	126	2.4	306	229	77
Readers Digest	General Interest	\$40,770	955	6.9	6564	2906	3657
Report on Business Magazine	Business	\$25,325	288	4.6	1315	966	348
Starweek	TV & Radio	\$17,794	616	1.6	992	449	543
Style at Home	Homes	\$15,950	230	7.0	1602	334	1268
Teen Tribute	Youth	\$17,720	400	2.5	984	368	617
The Beaver	General Interest	\$6,025	46	7.6	348	213	135
The Health Journal *	Health & Fitness		*	*	1108	420	689
The Hockey News Magazine	Sports	\$6,529	90	22.2	1997	1578	419
Today's Parent	Women's	\$19,620	185	10.1	1866	425	1442
Toronto Life	City & Regional	\$14,585	96	7.6	728	382	346
Tribute	Entertainment	\$19,900	500	3.1	1539	811	727
TV Week Magazine	TV & Radio	\$5,280	71	3.3	235	85	150
Vancouver Magazine	City & Regional	\$7,705	48	6.5	313	172	141
Vervegirl	Youth	\$13,029	151	2.0	305	56	249
Western Living	Lifestyles	\$22,170	184	3.2	585	296	289
Westworld	General Interest	\$13,770	1155	1.1	1255	600	655
what's cooking	Food & Beverage	\$40,869	1409	2.6	3705	883	2822
What's Up Kids Family Magazine	Women's	\$9,900	89	5.3	468	133	335

* 1 year data imputed into PMB 2 year data

Canadian Consumer/Business Magazines: Circulation, Page Rates & Readership: French (measured/reported in PMB 2009 Spring)

French Publications	Magazine Class	1P 4CB Rate (\$)	Circulation (000)	RPC	PMB 2008 ALL 12+ (000)		
					Readership	Male	Female
7 Jours	Women's	\$13,050	98	10	984	380	605
Affaires Plus	Business	\$9,585	89	3	270	176	94
Bel Âge Magazine	Mature Market	\$7,850	143	4.6	653	188	465
Châtelaine	Women's	\$16,800	206	4.3	895	210	685
Clin d'Oeil	Women's	\$8,520	77	9.1	697	145	552
Commerce	Business	\$5,925	44	2.9	127	90	37
Cool!	Youth	\$5,045	50	7.3	364	101	263
Côté Jardins	Gardening	\$4,710	*	*	312	96	217
Coup de Pouce	Women's	\$13,935	230	5.5	1254	374	880
Décoration Chez-Soi	Home	\$6,800	83	9	744	236	509
Décormag	Home	\$5,390	90	7.5	677	222	455
Dernière Heure	General Interest	\$4,760	20	14.8	297	104	193
Échos Vedettes	Women's	\$5,400	36	8.3	298	117	181
Elle Québec	Women's	\$9,930	93	8.5	788	165	623
Famous Quebec	Entertainment	\$10,747	142	1.3	182	79	103
Femme d'Aujourd'hui	Women's	\$4,140	*	*	251	57	195
Fleurs, Plantes et Jardins	Gardening	\$6,874	71	6.6	465	163	303
ICI	City & Regional	\$4,897	92	1	90	55	36
L'actualité	News	\$18,940	184	4.8	885	455	430
La Semaine	Women's	\$9,000	61	9.2	559	233	326
Le Lundi	Women's	\$7,095	28	18.3	513	203	311
Le Magazine Enfants Québec	Women's	\$8,185	64	3.5	223	56	167
Le Magazine Jobboom	General Interest	\$3,975	83	4.9	411	232	178
Les Affaires	Business	\$14,282	86	3.2	271	187	84
Les Idées de ma Maison	Home	\$6,800	74	10.1	746	273	473
LouLou (Fr) *	Women's	\$8,720	74	4.5	332	48	284
Madame	Women's	\$7,780	100	2.9	293	42	252
Moi & cie	Women's	\$5,465	46	4.9	225	18	207
Primeurs	TV & Radio	\$7,875	386	1	380	155	225
Québec Science	General Interest	\$3,630	20	13.1	262	154	108
qu'est-ce qui mijote	Food & Beverage	\$40,869	610	2.3	1392	406	986
Rénovation Bricolage	Home	\$4,905	35	16.1	564	335	230
Ricardo	Food & Beverage	\$7,750	*	*	511	133	378
Sélection du Reader's Digest	General Interest	\$13,230	255	4.2	1064	487	577
Sentier Chasse- Pêche	Fishing & Hunting	\$5,795	61	7.8	478	359	119
Star Inc.	Women's	\$6,510	37	13.4	495	176	319
Star Système	Entertainment	\$4,760	34	10.1	343	114	229
Summum	Men's	\$3,392	27	9.1	247	190	57
Touring (French & English)	General Interest	\$12,995	681	1.7	1171	640	531
Tout Simplement Clodine	Women's	\$5,720	32	12.4	397	65	332
TV 7 Jours/TV Hebdo	TV & Radio	\$9,770	211	3.4	719	304	415
Voir	City & Regional	\$24,641	*	*	500	280	221

* 1 year data imputed into PMB 2 year data

Canadian Consumer/Business Magazines: Circulation, Page Rates & Readership: English not reported in PMB 2009 (over 50,000 audited circulation)

English Publications	Magazine Class	Circulation (000)	1P 4CB Rate (\$)
2 Magazine	Women's	95	\$12,345
A Patient's Guide to Medical Information	Health & Fitness	**	\$7,500
Baby Stages Newborn	Babies & Moms	259	\$18,500
Baby Stages Tiny Tots	Babies & Moms	199	\$18,500
Canadian Home & Cottages	Homes	78	\$9,560
Chickadee	Children	102	\$6,900
Chill-The Official Magazine of the Beer Store	Men's	201	\$14,215
Chirp	Children	82	\$6,900
Common Ground	Health & Fitness	69	\$3,018
Dogs In Canada Annual	Animals	93	\$9,046
Dreamscapes Travel & Lifestyle Magazine	Travel	121	\$8,540
Exclaim!	Music	104	\$4,550
Famous Kids	Children	200	\$18,900
Here's How!	Consumer Technology	89	\$13,200
Home & Décor	Homes	66	\$2,265
Home Works	Homes	430	\$8,580
hub: consumer electronics & more	Consumer Technology	120	\$7,525
Jobposting Magazine	Students & Alumni	52	\$5,499
Kids Tribute	Children	298	\$17,500
Legion Magazine	Mature Market	274	\$12,097
Maxim	Youth	110	\$27,040
More	Women's	141	\$13,230
OMHA Hometown Hockey	Sports	96	\$6,470
Ontario Snowmobiler	Sports	68	\$7,085
Open Magazine	Health Magazine	80	\$3,650
Owl	Children	84	\$6,900
Parents Canada	Babies & Moms	120	\$11,995
Parents Canada Baby and Childcare Encyclopaedia	Babies & Moms	101	\$11,685
Parents Canada Best Wishes	Babies & Moms	148	\$15,782
Parents Canada Labour and Birth Guide	Babies & Moms	140	\$13,687
Performance Auto & Sound	Auto & Cycle	51	\$3,850
Plaisirs de Vivre/Living with Style	Homes	68	\$6,825
POP!	Children	373	\$16,400

** Not available

Canadian Consumer/Business Magazines: Circulation, Page Rates & Readership: **French not reported in PMB 2009** (over 50,000 audited circulation)

French Publications	Magazine Class	Circulation (000)	1P 4CB Rate (\$)
Auto Passion	Auto & Cycle	128,000	\$10,860
Aventure Chasse et Pêche	Fishing & Hunting	62,654	\$3,315
Baby Stages Newborn	Babies and Moms	299,000	\$18,500
Bien Grandir	Parenting	194,835	\$3,950
Branché	Consumer Technology	325,000	\$9,090
Cellier	Food & Beverage	100,000	\$9,705
Contact	Student & Alumni	155,000	\$2,725
Courrier Hippique	Horses	56,000	\$1,880
En Primeur	Entertainment	105,108	\$8,190
En Primeur Jeunesse	Children's	105,000	\$6,300
Espaces	Travel	59,894	\$3,850
Forces	Technical, economic	66,500	\$6,000
Gardening News	Gardening	350,000	\$6,000
Guide des Vacances au Québec (Winter/Spring)	Travel	1,189,204	\$11,000
Guide des Vacances au Québec (Summer/Fall)	Travel	430,204	\$5,500
Les idées Réno Dépôt	Home	50,000	\$5,410
Le Journal Santé	Health & Fitness	144,000	\$6,200
Magazine Le Clap	Entertainment	100,000	\$3,075
Mon Enfant	Babies and Moms	50,550	\$7,315
Le Must Alimentaire	Food & Beverage	75,000	\$8,000
New Outlook	Mature Market	330,000	\$14,500
Nouvelles CSQ	General Interest	85,000	\$4,995
Occasions	Food & Beverage	170,000	\$13,595
Place des Arts Magazine	Entertainment	200,000	\$7,350
Plaisirs de Vivre	Homes	67,796	\$7,575
Pop!	Children's	373,020	\$10,000
Protégez-Vous	General Interest	117,549	\$9,075
pure	Women's	68,931	\$8,310
Quebec Scope Magazine	Lifestyle	50,000	\$1,895
Sentier VTT Quad	Sports	52,169	\$3,280
Styles de Vie	French	190,567	\$6,495
UdeS	Alumni of Sherbrooke University	90,000	\$5,150
Virage	Mature Market	203,224	\$5,460
Voilà Québec	TV & Radio	116,000	\$7,195

General Business Publications

Based on Canadian Advertising Rates & Data (CARD) business publications represent the single largest category within the vertical business offerings, in total number of titles. There are more than 80 categories listed alphabetically, from "Advertising & Marketing" to "Woodworking."

PMB measures the readership of three segments of the business audience – Selected

Professional/Business Managers (SPBMs), those with business purchase influence (BPIs) and readers with personal incomes of more than \$60,000. When considering the business audience, many of the available consumer publications also index highly for the three above mentioned targets. The chart below illustrates a selection of both general business and consumer publications and their respective indices against PMB-de-

finied 'Business' Targets, highlighting those that index above 140%.

Year over year change: From '08 to '09 there were 5 additional publications that index higher than the specified 140, these titles include *Cottage Life*, *Food & Drink*, *Professionally Speaking* and *The Globe and Mail* (Sat). There was only 1 title (*Decoration Chez Soi*) that no longer has an index above 140.

Magazine	TOTAL CANADA 18+ INDEX			
	Circulation	Selected Prof. Bus. Managers SPBMs	Business Purchase Influence	Personal Income \$60K+
English				
Canadian Business	78.5	301	180	245
Cottage Life	70	200	141	175
EnRoute	155.5	349	185	285
FP Business	207.1	316	177	276
Food & Drink	524.1	170	132	153
Golf Canada	136.8	206	147	171
Macleans	361	168	121	140
Money Sense	104.8	247	146	231
National Post (M-F)	191.8	254	143	270
Professionally Speaking	209.9	207	143	236
Profit	128.8	363	202	258
Report on Business Magazine	NA	288	165	264
Style at Home	227.5	155	129	104
The Globe & Mail (M-F)	335.5	271	146	251
The Globe & Mail (SAT)	402.8	253	145	234
Toronto Life	89.6	238	142	208
Vancouver Magazine	48.4	196	140	159
Western Living	185.4	222	148	188
French				
Affaires Plus	81.9	244	177	167
Commerce	40.8	339	191	218
L'actualite	181.2	140	123	130
Le Devoir (sat)	41.3	174	139	107
Les Affaires	81.9	207	146	200

Source(s): CARD Spring/Summer 2009; PMB 2008 2 Year Survey

Magazine	Circulation			RATE		
	(000)	P 4C	P B+W	P 4C	P B+W	P B+W
Canadian Family Physician	34.5	3,720	2,160			
CME	38.6	4,370	2,535			
Canadian Journal of Diagnosis	38.6	4,445	2,610			
Canadian Medical Association Journal	71.1	5,160	3,290			
Le Medecin du Quebec	18.7	2,785	1,600			
Ontario Medical Review	28.3	2,670	1,420			

Source: CARD Spring/Summer 2009

Magazine	Circulation		RATE	
	(000)	P B+W	P B+W	P B+W
The Ad Pages	11	3,320		
AMPO Repertoire (French)	15.1	1,950		
CARD	845	5,448		
Marketing	10.7	6,170		
Blitz Magazine	N/A	3,395		
Contact	26.6	6339.5		
Strategy	11.5	5,510 (4/C)		

Source: CARD Spring/Summer 2009

MEDICAL JOURNALS

There are 75 medical publications listed in CARD. Editorial themes/topics include specific fields such as surgery or cardiovascular medicine, and some on general medicine. 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. More complete details on the Medical Study are available in the Print Measurement Bureau listing on page 56 of this digest. Opposite is a partial sample of some of the Medical titles available.

ADVERTISING & MARKETING PRESS

A further example of the range of businesses reported in CARD is its "Advertising & Marketing" section.

FARM PUBLICATIONS

Finally, CARD devotes a separate section to Farm publications, of which nearly 93 are published in Canada, principally in provinces west of Ontario. Leading titles are *Central Alberta Farmer*, *La Nouvelle Agricole*, *Canola Digest*, *Dairy Update*, *Cattlemen*, *Better Farming*, *Western Producer* and *Saskatchewan Farm Life*.

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.



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 connects with 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 or turned off.

Whether building reach fast or targeting specific market segments like health and fitness enthusiasts, air travelers 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 live 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 300 case studies demonstrating the power of our medium, creative guidelines for effective OOH communications, research, and a list of our member companies and their products.

Out-of-Home & Transit

Out-of-Home

GENERAL INFORMATION

Consumers spend more than 50% of their time outside of the home and more than 5 hours a week are spent commuting.* Out-of-home media presents a means of connecting with this consumer.

*Source: TNS Canadian Facts

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 gen-

erally categorized into two groups: traditional and non-traditional. The first group includes types which 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.

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

Measurement of circulation includes vehicular traffic for outdoor products. Circulation for some outdoor products also includes pedestrian traffic. Indoor media circulations include pedestrian traffic only. GRPs are calculated using circulation.

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 traditional 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 Campaign Specific Audit.

Most non-traditional out-of-home media do 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.

Out-of-home reach and frequency are determined using circulation counts and potential exposure data from a syndicated database. In the case of traditional media, there is COMB Navigator, which uses audited circulation and exposure data from BBM RTS to estimate reach and frequency for a number of demographic groups.

DEFINITIONS

HORIZONTAL POSTERS Horizontal posters are 10'H x 20'W, illuminated from the front, paper-covered boards that are available in most markets. Posters are printed on multiple sheets of paper which 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.

Distribution

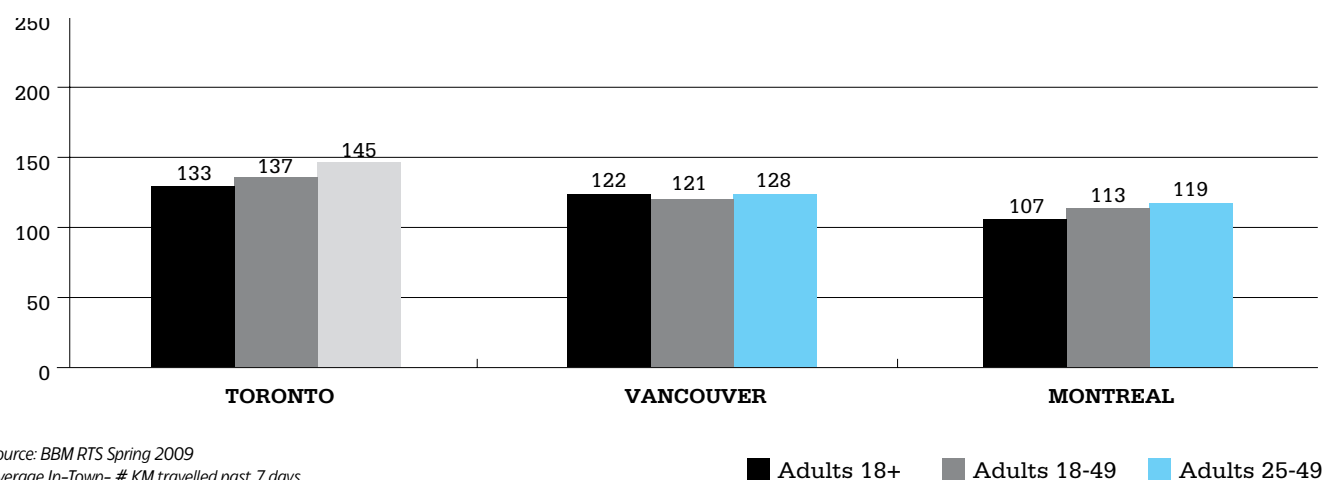
Total inventory of traditional outdoor (faces)	44,523
Total inventory of new out of home (faces)	41,413

Consumption (A18+)

1 week reach	96%
Kilometres driven average per week	135
A18-24 taking transit at least once per week	6.2%

Sources: COMB Market Data Report April 2009, BBM RTS Spring 2009

WEEKLY AVERAGE IN-TOWN KILOMETRES TRAVELLED PER CAPITA



Source: BBM RTS Spring 2009
Average In-Town - # KM travelled past 7 days

BACKLIT OUTDOOR Backlit units are, as their name suggests, lit from behind. The standard size is 9'H x 22'W. 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, kiosks/columns with advertising faces. The standard size is 6'H x 4'W. 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. 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/MURALS These are large-format advertising displays. Each location is oversized and unique in dimension. Printed on vinyl, 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'H x 44'W) and Series 14 (14'H x 48'W).

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 includes both the small digital screens in the upper corner 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 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.

4 WEEK OUT-OF-HOME REACH AND FREQUENCY SCHEDULE BASED ON 25 DAILY GRPS FOR HORIZONTAL POSTERS AND STREET FURNITURE										
Market	12+ Pop'n	Operator	Product	Panel Numbers	TARGET: 12+			TARGET: 25-54		
					GRPs/wk	Impr/wk	4 wks	GRPs/wk	Impr/wk	4 wks
Montreal CMA	3293.3	Astral	Horizontal	23	178	23442	66.1/10.8	185	12677	66.4/11.1
		Pattison	Horizontal	26	176	23152	63.2/11.1	176	12082	63.0/11.2
		CBS	Horizontal	26	182	23969	67.9/10.7	183	12509	67.8/10.8
		Astral	Column	51	175	23095	58.4/12.0	176	12033	58.1/12.1
		Pattison	Street Furniture	53	176	23231	58.1/12.1	177	12143	57.9/12.3
		CBS	Street Furniture	62	175	23087	68.4/10.2	178	12210	68.4/10.4
Toronto CMA	4783.5	Astral	Horizontal	42	177	33930	60.1/11.8	181	18633	59.7/12.1
		Pattison	Horizontal	60	178	34021	66.4/10.7	180	18585	65.9/11.0
		CBS	Horizontal	49	177	33847	68.6/10.3	179	18448	68.1/10.5
		Astral	Street Furniture	73	176	33627	66.7/10.5	177	18173	66.1/10.7
		Pattison	Street Furniture	108	177	33778	43.3/16.3	177	18224	42.8/16.5
		CBS	Street Furniture	63	176	33681	62.7/11.2	176	18172	62.1/11.4
Calgary CMA	985.9	Astral	Horizontal	15	173	6944	65.6/10.7	188	4199	67.4/11.1
		CBS	Horizontal	15	181	7266	59.7/12.3	196	4394	61.5/12.8
		Pattison	Street Furniture	22	172	6920	58.4/12.0	182	4076	59.6/12.2
		CBS	Street Furniture	26	175	7037	70.3/10.2	180	4033	71.4/10.1
		Mix			701	28167	90+	746	16702	90+
		Pattison	Horizontal	23	173	14214	68.8/10.3	183	7726	67.3/10.9
Vancouver CMA	2002.8	CBS	Horizontal	19	178	14630	58.5/12.5	186	7876	57.3/13.0
		Pattison	Street Furniture	40	174	14301	64.3/11.1	183	7720	62.9/11.6
		CBS	Street Furniture	30	172	14163	68.9/10.3	178	7511	67.2/10.6
		Mix			697	57308	90+	730	30833	90+

Source: COMB Navigator

COMPARISON OF OUT-OF-HOME MEDIA

Product	Supplier	# of Markets	Size (h x w)	Measure of Media Weight	Rotation Period	Min. Flight Length
AIRPORT ADVERTISING						
Exterior	Astral Media Outdoor	2	Various	Location Buy	n/a	n/a
Interior	Astral Media Outdoor	2	Various	Location Buy	n/a	n/a
Exterior	Clear Channel Outdoor	2	Various	Location Buy	n/a	n/a
Interior	Clear Channel Outdoor	2	Various	Location Buy	n/a	n/a
Express Television	Clear Channel Outdoor	3	Various	Location Buy	n/a	n/a
Interior	Fly Away	n/a	n/a	n/a	n/a	n/a
Interior	Interspace Airport Advertising	13	Various	Location Buy	n/a	n/a
Interior	Pattison	1	Various	Location Buy	4 wks	4 wks
Exterior	Pattison	4	Various	Location Buy	4 wks	
Digital Interior	Pattison	1	Various	Location Buy	4 wks	
Digital Exterior	Pattison	1	Various	Location Buy	4 wks	
Specialty	Pattison	9	Various	Location Buy	4 wks	
BACKLITS						
Backlits	Astral Media Outdoor	2	Various	Location Buy	4 wks	4 wks
Backlits Horizontal	CBS Outdoor Canada	8	9' x 22'	Panel Buy	4 wks	4 wks
Backlits Vertical	CBS Outdoor Canada	1	Various	Location Buy	4 wks	4 wks
Backlits	Cineplex Entertainment	National	4' x 6'	Location Buy	4 wks	4wks
Backlits	Far West Outdoor	1	10' x 30'	Location Buy	4 wks	4wks
Backlits	IMA Outdoor	1	16' x 60'	Location Buy	4wks	4wks
Backlits	Maxximum Outdoor Inc.	1	Various	Location Buy	4 wks	4 wks
Backlits Superboards/ Bulletins/Spectaculars	Pattison	63	Various	Location Buy	4 wks	4
Backlit Spectaculars	PenEx Media	1	Various	Location Buy	4 wks	4 wks
Backlits	Pumped Inc.	1	Various	Location Buy	Varies	n/a
Tunnel	Gallop + Gallop Media Corporation	1	6' x 10'	Location Buy	Varies	Varies
Backlits	Van Wagner Communications Company Canada	1	Various	Location Buy	4 wks	4 wks
Backlits	Titan Worldwide	1	Various	Location Buy	n/a	n/a
SUPERBOARDS, BULLETINS, SPECTACULARS						
Superboards	Astral Media Outdoor	6	14' x 48'	Location Buy	4 wks	4 wks
Superboards	The Billboard People Inc.	12	10' X 40'	Location Buy	4 wks	4 wks
Superboards	The Billboard People Inc.	5	14' x 48'	Location Buy	4 wks	4 wks
Superboards	CBS Outdoor Canada	9	10' x 44'	Location Buy	4 wks	4 wks
Superboards	CBS Outdoor Canada	5	14' x 48'	Location Buy	4 wks	4 wks
Spectaculars	Clear Channel Outdoor	8	Various	Location Buy	4 wks	4 wks
Superboards, bulletins, spectaculars	Doubleclutch Communications Inc.	1	Various	Location Buy	4 wks	4 wks
Superboards	E.C Boone Ltd.	1	Various	GRPs/ Location	4 wks	4 wks
Superboards	Far West Outdoor	1	14' x 48'	n/a	n/a	n/a
Billboards	IMA Outdoor	1	12' X 40'	Location Buy	4 wks	4 wks
Posters	King West Central	1	40' X 15'	Location Buy	n/a	n/a
Spectaculars	Maxximum Outdoor Inc.	2	Various	Location Buy	4 wks	4 wks
Various	Media House	1	Various	Location Buy	n/a	n/a
Various	Media One Outdoor	1	Various	Location Buy	n/a	n/a
Spectacular Scrolling Display	Outdoor Broadcast Network Inc.	1	Various	Location Buy	8 wks	8 wks
Superboard Series 10	Pattison	31	Various'	Location Buy	Various	Various
Superboard Series 14 "Max"	Pattison	15	14' X 48'	Location Buy	4 wks	4 wks
Spectaculars	Pattison	10	Various	Location Buy	Various	Various
Superboards, bulletins, spectaculars	Prime Outdoor	1	Various	Location Buy	4 wks	4 wks
Spectaculars, posters	RCC Media	1	Various	Location Buy	n/a	n/a
Backlit Superboards	SuperSign Outdoor	1	Various	Location Buy	n/a	n/a
Superboards, Bulletins, Spectaculars	Titan Worldwide	2	Various	Location Buy	n/a	n/a
Banners	Titan Worldwide	1	Various	Location Buy	n/a	n/a
Tri-Vision	Titan Worldwide	1	Various	Location Buy	n/a	n/a
Inflatable Billboards	Tynk Outdoor	National	Various	Location Buy	n/a	n/a
Spectacular	West Palm	n/a	n/a	n/a	n/a	n/a
Superboards, bulletins, spectaculars	Yonge 401	1	10' x 35'	Location Buy	4 wks	4wks
ELECTRONIC MESSAGE SIGNS						
Digital Network	Astral Media Outdoor	1	48"x14'	Network/ Location Buy	4 wks	4wks

COMPARISON OF OUT-OF-HOME MEDIA CONT'D

Product	Supplier	# of Markets	Size (h x w)	Measure of Media Weight	Rotation Period	Min. Flight Length
Elevator Advertising	Captivate Network	3	n/a	Location Buy	1 wk	1wk
Elevator Advertising	IHN Media	n/a	n/a	Location Buy	n/a	n/a
Hospital Electronic Signs	Lumicom Media Inc.	1	1' 7" x 3' 7"	Location Buy	12 wks	12 wks
Electronic Message Signs	Metro Toronto Convention Centre	1	n/a	Location Buy	1 wk	1 wk
eBoards-Resto-Bar	NEWAD	National	Various	# of Impressions	2 wks	2wks
eBoards-Colleges & Universities	NEWAD	National	Various	# of Impressions	2 wks	2 wks
Video Board Network	Outdoor Broadcast Network	National	Various	National/Regional	n/a	n/a
Digital Networks- Mall/Elevator/TTC	Pattison	35	Various	Location Buy	4 wks	4 wks
LED Video Screen	Titan Outdoor	1	22'x30'	Location Buy	n/a	n/a
Video Panels	POPMedia Network	National	n/a	National/Regional	n/a	n/a
Videoscreen	Titan Worldwide	1	Various	Location Buy	n/a	n/a
Digital Screens	Zoom Media	12	15"	# of screens, length of loop	4 wks	4 wks
EVENTS						
Klubcat, mobile club	Redcat Media	National	Various	# of high schools	6 wks	6 wks
MALL POSTERS						
Mall Backlits	ActionView Advertising System Inc.	n/a	7' X 4'	Location Buy	4 wks	4 wks
Mall Backlits	Bayview Village Shopping Centre	1	4' X 5'	Location Buy	n/a	n/a
Mall Banners and Posters	Clear Channel Outdoor	National	Various	Location Buy	4 wks	4 wks
Mall Posters	CMedia Malls Canada Inc.	n/a	11' x 3'	Location Buy	4 wks	4 wks
Mall Posters	Holt Renfrew Centre Mall Posters	1	4' x 5'	Location Buy	4 wks	4 wks
Mall Backlits	IMA Outdoor	2	4' x 6'	Location Buy	4 wks	4 wks
Mall Banners	Maxximum Outdoor Inc.	2	Various	Location Buy	4 wks	4 wks
Mall Posters	Outdoor Broadcast Network Inc.	1	12' x 16'	Location Buy	8 wks	8 wks
Mall Posters, Banners/ Specialty/Digital	Pattison	28	Various	GRPs/ Location Buy	4 wks	4 wks
Mall Posters, Banners, Digital	neo Traffic	19	Various	Location Buy	4 wks	4 wks
POSTERS						
Posters	Albion & Woodside Cinemas	1	7' 4" x 11'	Location Buy	4 wks	4 wks
Horizontal Posters	Astral Media Outdoor	9	10' x 20'	GRPs/ Location	4 wks	4 wks
Vertical Posters	Astral Media Outdoor	8	16' x 12'	GRPs/ Location	4 wks	4 wks
Posters	Bayfield 7 Cinema	1	8' x 3'	Location Buy	4 wks	4 wks
Posters	The Billboard People Inc.	50	10' x 20'	Location Buy	4 wks	4 wks
Posters	The Billboard People Inc.	13	10' x 30'	Location Buy	4 wks	4 wks
Posters	CBS Outdoor Canada	National	10' x 20'	GRPs/ Location	4 wks	4 wks
Posters	E.C Boone Ltd.	1	10' x 20'	GRPs/ Location	4 wks	4 wks
Posters	Far West Outdoor	n/a	10' x 20'	Location Buy	4 wks	4 wks
Horizontal Posters	Pattison	National	10' x 20'	GRPs/ Location	4 wks	4 wks
Vertical Posters	Pattison	National	12' x 16'	GRPs/ Location	4 wks	4 wks
Digital Posters	Pattison	2	Various	Location Buy	4 wks	4 wks
STREET LEVEL						
Street Level	Adapt Media Inc.	17	4' x 6'	GRPs/ Location	4 wks	4 wks
Column and Megacolumns	Astral Media Outdoor	4	5' x 3'	GRPs/ Location	4 wks	4 wks
Transit Shelter	Astral Media Outdoor	1	4' x 6'	GRPs/ Location	4 wks	4 wks
Street Level	Canadian TODS Ltd.	Ontario	n/a	Location Buy	n/a	n/a
Transit Shelter	CBS Outdoor Canada	National	6' x 4'	GRPs/ Location	4 wks	4 wks
Transit Shelter	Clear Channel Outdoor	1	4' x 6'	GRPs/ Location	4 wks	4 wks
Transit Shelter	Creative Outdoor Advertising	23	72' x 23'	Location Buy	4 wks	4 wks
Street Level	Derksen (Canada) Inc.	n/a	n/a	Location Buy	1 night	1 night
Street Level	EcoMedia Direct Inc.	1	5' x 3'	Location Buy	2 wks	2 wks
Street Level	Far West Outdoor	1	n/a	n/a	n/a	n/a
Flashmedia	Gallop + Gallop Media Corporation	19	24" x 32"	GRPs/ Location	4 wks	4 wks
Wild Postings	Grassroots Advertising Inc.	11	Various	Location Buy	1-4 wks	1-4 wks
Transit Shelter	IMA Outdoor	Go Stations	4' x 6'	Location Buy	4 wks	4 wks
Transit Signs	IMA Outdoor	Go Stations	6" x 12"	Location Buy	4 wks	4 wks
Interactive Street Level	IMA Outdoor	1	n/a	Location Buy	n/a	n/a
Wild Postings	Mango Moose Media	3	Various	Location Buy	4 wks	4 wks
Projection Media	Mango Moose Media	n/a	n/a	n/a	n/a	n/a
Backlights	Paris Lites	1	6'3" x 4'7"	Location Buy	n/a	n/a
Street Level	Pattison	National	Various	GRPs/ Location	4 wks	4 wks
Bus Benches	Pattison	3	2' x 6'	Location Buy	n/a	26 wks
Transit Shelter	Streetseen Media	7	4' x 6'	GRPs/ Location	4 wks	4 wks

Source: CARD Spring/Summer 2009

COMPARISON OF OUT-OF-HOME MEDIA CONT'D

Product	Supplier	# of Markets	Size (h x w)	Measure of Media Weight	Rotation Period	Min. Flight Length
INDOOR POSTERS						
Fitting Room Posters	Fashion Frame	7	13" x 17"	Location Buy	4 wks	4 wks
Indoor Posters	Grassroots Advertising Inc.	3	n/a	n/a	n/a	n/a
Resto-Bar	Media One Indoor	n/a	n/a	# of Faces	n/a	n/a
Office Building	Mediacity	6	13' x 17'	# of Faces	4 wks	4 wks
Washroom Posters						
Elevator Advertising	Metromedia	5	Various	Location Buy	n/a	n/a
Indoor Billboards-Resto-Bar	NEWAD .	National	Various	# of Impressions	2 wks	4 wks
Indoor Billboards -Health & Fitness	NEWAD	National	Various	# of Impressions	2 wks	2 wks
Indoor Billboards - Colleges and Universities	NEWAD	National	Various	# of Impressions	4 wks	4 wks
Tanning Salon Room Posters	Statements Media	n/a	14" x 20"	# of Faces	4 wks	4 wks
Washroom Posters	Stellar Stall Advertising	n/a	Various	# of Faces	n/a	n/a
Indoor Billboards - Resto-bar	Zoom Media Inc.	15	Various	# of Faces	4 wks	4wks
Indoor Billboards - Fitness	Zoom Media Inc.	19	Various	# of Faces	4 wks	4 wks
Indoor Billboards - Campus	Zoom Media Inc.	15	Various	# of Faces	4 wks	4 wks
Indoor Billboards - Golf Courses	Zoom Media Inc.	14	Various	# of Faces	4 wks	4 wks
Indoor Billboards - Medical	Zoom Media Inc.	9	Various	# of Faces	4 wks	4 wks
MOBILE SIGNAGE						
Bicycle	CycleMedia	1	n/a	# of Faces	n/a	n/a
Mobile	GO Mobile Media	1	Various	n/a	n/a	n/a
Truck	Impact Media	1	9" x 12"	Hour	n/a	n/a
Truck	Lime Outdoor	National	n/a	n/a	n/a	n/a
Bicycle	Mango Moose Media	1	Various	# of Faces	n/a	n/a
Wraps	Mango Moose Media	7	Various	# of Faces	20 days	20 days
Mobile	Mango Moose Media	National	Various	# of Faces	Daily	Daily
Video Panels	Media Nomadz	n/a	n/a	Hour	n/a	n/a
Truck	Mobile Outdoor Media Advertising	Major Markets	Various	# of Faces	n/a	12 wks
illuminated Vehicle Billboards	Motomedia	19	n/a	Hour	n/a	n/a
Bicycle	Promogroup Canada	1	4' x 6'	Day	n/a	n/a
Rickshaw	Rickshaw Runners of Toronto Media	1	Various	Week	n/a	n/a
Rollerblader	The Rolling Ads/La Pub Qui Roule	1	2' x 2'	n/a	n/a	n/a
Mobile billboard/Wraps	RS Ontario Inc. Outdoor Media	n/a	n/a	n/a	n/a	n/a
Banner	Splash Creation	1	20' long	n/a	n/a	n/a
Mobile billboard	Streetlevel Media Vehicles	1	Various	n/a	4 wks	4 wks
Mobile billboard	ThinkTank Advertising & Design	1	Various	n/a	n/a	n/a
Truck	TransAd Marketing Group	Ontario	n/a	n/a	n/a	n/a
Truck	Urban Visions	1	n/a	n/a	n/a	n/a
Segway	Velocity Advertising	n/a	n/a	n/a	n/a	n/a
Truck	West Palm	n/a	Various	n/a	n/a	n/a
Scooter	Wild on Media	National	n/a	# of Faces	n/a	n/a
Truck	WOW Mobile Media	n/a	53' x 8'	# of Faces	n/a	n/a
MURALS						
Murals & Banners	Abcon Media	1	n/a	Location Buy	n/a	n/a
Murals	Astral Media Outdoor	1	n/a	Location Buy	4 wks	4 wks
Artistic Murals	Astral Media Outdoor	1	n/a	Location Buy	4 wks	4 wks
Murals, Banners & Multimedia	CBS Outdoor Canada	1	Various	Location Buy	4 wks	4 wks
Murals	Far West Outdoor	1	n/a	Location Buy	n/a	n/a
Murals & Banners	Maximum Outdoor Inc.	2	Various	Location Buy	4 wks	4 wks
Wall Banners & Outdoor Exclusives	The Media Merchants	1	Various	Location Buy	n/a	n/a
Murals & Wall Banners	Pattison	2	Various	Location Buy	Various	Various
Big Banners	Rouge Campus	National	10' x 7'	# of Campuses	4 wks	4 wks
Big Banners	Rouge Restobar	National	5' x 7'	# of Venues	4 wks	4 wks
Murals	StrategicMedia Outdoor Inc.	1	Various	Location Buy	4 wks	4 wks
Murals	Titan Worldwide	1	Various	Location Buy	n/a	n/a

COMPARISON OF OUT-OF-HOME MEDIA CONT'D

Product	Supplier	# of Markets	Size (h x w)	Measure of Media Weight	Rotation Period	Min. Flight Length
PARKING LOT						
Gate arms	Abcon Media	1	48" x 5.75"	n/a	n/a	n/a
Interactive Street Level	IMA Outdoor	4	n/a	n/a	n/a	n/a
Pillar	Padvertising	1	Various	n/a	4 wks	4 wks
Indoor Billboards	Zoom Media Inc.	5	Various	# of Faces	4 wks	4 wks

OUT-OF-HOME DISTRIBUTION

Top 20 Markets By Population	Airport	Backlight	Electronic Message	Elevator	Indoor	Mall	Murals	Parking Lot	Posters	Street Level	Superboard
Calgary	P	CBS,FW,P	CA	CA	FF,MC,NE,Z	CC,NT,P	-CBS	AB	CBS,FW,P	AM,CBS,GG,GR,P	CC,P
Edmonton	I, P	CBS,P		-	FF,NE,Z	CC,NT,P,OBN	-	AB	CBS,P	AM,CBS,GG,GR,P	P
Greater Sudbury	-	CBS		-	Z	CC,NT,P	-	-	CBS,P	CBS,P	-
Halifax	I	-		-	NE	NT, OBN	-	-	CBS,P	AM,CBS	CBS,CC,P
Hamilton	I	CBS,P		-	NE,Z	CC,P	-	AB	AO,CBS,P	AM,CBS,CO,GG,GR,IMA,P	CBS,P
Kitchener	-	P		-	NE	CC,P	-	-	CBS,P	GG,P	CBS,P
London	-	P		-	NE,Z		-	AB	P	CBS,CO,GG,GR,P	P
Montréal	AO	AO,CBS,IMA,P		-	FF,MC,NE,Z	CC,NT,P	-	AB	AO,CBS,P	AM,AO,CBS,GG,GR,MM,P	AO,CBS,CC,P
Oshawa	-	-		-	NE,Z	P	-	AB	CBS,P	GG,IMA,P	-
Ottawa-Gatineau	I, P	P		-	FF,MC,NE,Z	P	-	AB	AO,CBS,P	AM,CC,GR,P	AO,CBS,MX
Québec	AO	AO,CBS,P		-	FF,MC,Z	NT,P	-	AB	AO,CBS,P	AO,CBS,GG,GR,P	AO,CBS,P
Regina	I	-		-	NE	CC	-	AB	CBS,P	AM,CO,GG,P	CBS,P
Saguenay (Que.)	-	-		-	NE	-	-	-	CBS	AO,CBS,GG	CBS
Saskatoon	I, P	P		-	NE	P, OBN	-	AB	CBS,P	AM,GG,P	CBS,P
Sherbrooke (Que.)	-	-		-	NE	-	-	-	AO,CBS,P	AO,CBS,GG	-
St. Catharines (Ont.)	-	P		-	Z	P	-	-	CBS,P	AM,GG,P	P
Toronto	CC	AO,CBS,CX,GG,MX,P,PX,S	CA,MTC	CA,MA	FF,GR,MC,NE,Z	AR,BV,CC,IMA,MX,OBN,NT,P	AO,CBS,ME,MX,P,S	AB,IMA,PV	AO,CBS,P	AM,AO,CBS,CO,EC,GG,GR,IMS,MM,PL,P	AO,CBS,CC,DC,IMA,MH,MX,M1,OBN,P,PR,RCC,SS,T,Y
Vancouver	CC	CBS,P	CA	CA	FF,MC,NE,Z	CC,IMA,P,OBN	CBS,P	AB	CBS,P	AM,CBS,GG,GR,MM,P	P
Windsor	-	-		-	NE,Z	P	-	AB	CBS,P	CBS,GG	CBS,P
Winnipeg	I	-		-	NE	CC,NT,P,OBN	-	AB	CBS,P	AM,CBS,GG,GR,P	CBS,P

Source: COMB Market Data Report April 2008, Statistics Canada

LEGEND

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

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 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.

The Transit Reach Frequency Model provides the advertising industry with a single source planning tool that is applicable to all major transit markets across the country. It provides users with detailed analysis utilizing market specific, demographic and product usage data

to plan and buy transit campaigns.

The model uses market specific BBM Return to Sample (RTS:RAE). The sample allows planners to recognize individual market nuances and offers audience demographics, media habits and product usage. Data is updated twice annually in May and September and market options include CMA and Transit system “footprint” with either a CSD or Core definition.

Planners can select the number of campaign weeks, from 4–8–12 but anywhere from 1–52 weeks is available, and the tool generates standard reports.

EXTERIOR

SEVENTY POSTERS are 21”H x 70”W in aluminum frames permanently attached to the sides & the rears of buses. These are the most widely available units.

KING POSTERS are 30”H x 139”W 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. Full wraps 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 11”H x 35”W and Super 11”H x 70”W.

DOOR CARDS/VERTICAL POSTERS are a verti-

cal format usually found beside the doors of cars. They are available on both subway and commuter trains. A standard 28”H x 20”W size unit can also be found on station walls in some markets.

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 68 ¼”H x 47 ¼” W. Larger format backlits and murals 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 can purchase 100% of all available station inventory that includes 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.

COMPARISON CHART OF TRANSIT MEDIA

Product	Supplier	# of Markets	Size (h x w)	Measure of Media Weight
INTERIOR				
Interior Posters	21st Century Advertising	1	35" x 11"	Full or 1/2 Showing
Interior Super Posters	21st Century Advertising	1	70" x 11"	Full or 1/2 Showing
Interior Posters	Belleville Transit	1	Various	Full or 1/2 Showing
Interior Posters	CBS Outdoor Canada	4	11" x 35"	GRPs/%Showing
Interior Super Posters	CBS Outdoor Canada	4	11" x 70"	Full or 1/2 Showing GRPs/%Showing
Interior Posters	Day Nite Media Sales	4	35" x 11"	Full or 1/2 Showing
Interior Super Posters	Day Nite Media Sales	4	70" x 11"	Full or 1/2 Showing
Interior Posters	Exclusive Advertising	1	20" x 28"	Full or 1/2 Showing
Airplane Tray Tables	Inflite Media	n/a	n/a	# of vehicles
Interior Posters	Lamar Transit Advertising	26	11" x 35"	Full or 1/2 Showing
Interior Super Posters	Lamar Transit Advertising	6	11" x 70"	Full or 1/2 Showing
Interior Bus Vertical Posters	Métromédia Plus	1	20" x 28"	Full or 1/2 Showing
Interior Subway Vertical Posters	Métromédia Plus	1	20" x 28"	Full or 1/2 Showing
Interior Posters	Métromédia Plus	8	35" x 11"	Full or 1/2 Showing
Interior Super Posters	Métromédia Plus	8	70" x 11"	Full or 1/2 Showing
Interior Posters	North Bay Transit	1	35" x 11"	Full or 1/2 Showing
Interior Posters	Pattison	18	35" x 11"	GRPs/Full or 1/2 Showing
Interior Super Posters	Pattison	17	70" x 11"	GRPs/Full or 1/2 Showing
Interior Posters	Peterborough Transit	1	35" x 11"	Full or 1/2 Showing
Interior Super Posters	Peterborough Transit	1	70" x 11"	Full or 1/2 Showing
Interior Posters	Reid Signs	1	35" x 11"	Full or 1/2 Showing
Interior Posters	Sambrook Media	4	35" x 11"	Full or 1/2 Showing
Interior Super Posters	Sambrook Media	4	70" x 11"	Full or 1/2 Showing
Seatbacks	School Bus Seatbacks	1		# of vehicles
Interior Posters	Streetseen Media	50	35" x 11"	Full or 1/2 Showing
EXTERIOR				
Exterior 70s	21st Century Advertising	1	21" x 70"	GRPs
Exterior Kings	21st Century Advertising	1	30" x 139"	GRPs
Exterior Windows	21st Century Advertising	1	Various	# of vehicles
Exterior Bus Backs	Airport Express Bus Ads	1	n/a	# of vehicles
Exterior 70s	Belleville Transit	1	21" x 70"	GRPs
Exterior 70s	CBS Outdoor Canada	4	21" x 70"	GRPs
Exterior Kings	CBS Outdoor Canada	4	30" x 139"	GRPs
Exterior 70s	Day Nite Media Sales	5	21" x 70"	GRPs
Exterior Bus Decals	Day Nite Media Sales	4	Various	# of vehicles
Exterior Kings	Day Nite Media Sales	5	30" x 139"	GRPs
Exterior 70s	Far West Outdoor	1	21" x 70"	GRPs
Exterior Backs	IMA Outdoor	1	4' x 8'	GRPs
Exterior Kings	IMA Outdoor	1	30" x 139"	GRPs
Horizontal Posters	IMA Outdoor	1	7' x 14'	# of vehicles
Exterior 70s	Lamar Transit Advertising	30	21" x 70"	GRPs
Exterior Kings	Lamar Transit Advertising	11	30" x 139"	GRPs
Exterior 70s	le Groupe Imagi Communication	27	21" x 70"	GRPs
Exterior Kings	le Groupe Imagi Communication	26	30" x 139"	GRPs
Exterior 70s	Métromédia Plus	8	21" x 70"	GRPs
Exterior Kings	Métromédia Plus	8	30" x 139"	GRPs
Exterior 70s	North Bay Transit	1	21" x 70"	GRPs
Exterior Kings	North Bay Transit	1	30" x 139"	GRPs
Exterior Bus Decals	Pacific Western Tour Bus Advertising	n/a	7' x 4'	# of vehicles
Exterior 70s	Pattison	19	21" x 70"	GRPs/Full/Half
Exterior Kings	Pattison	19	30" x 139"	GRPs/Full/Half
Exterior 70s	Peterborough Transit	1	21" x 70"	GRPs
Exterior Kings	Peterborough Transit	1	30" x 139"	GRPs
Exterior Windows	Peterborough Transit	1	Various	# of vehicles
Exterior 70s	Reid Signs	1	21" x 70"	GRPs
Exterior Kings	Reid Signs	1	30" x 139"	GRPs
Exterior 70s	Sambrook Media	4	21" x 70"	GRPs
Exterior Kings	Sambrook Media	4	30" x 139"	GRPs

TRANSIT MEDIA SUPPLIERS IN TOP 10 MARKETS

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

COMPARISON CHART OF TRANSIT MEDIA CON'T

Product	Supplier	# of Markets	Size (h x w)	Measure of Media Weight
Exterior 70s	Streetseen Media	49	21" x 70"	GRPs
Exterior Kings	Streetseen Media	49	30" x 139"	GRPs
Exterior Taxi	Taxi Advertising	n/a	Various	GRPs
Headliners	Pattison	9	Various	GRPs/Full/Half
Headliners/Kings	Pattison	11	Various	GRPs/Full/Half
Headliners/70s	Pattison	4	Various	GRPs/Full/Half
Superbus/Train	Pattison	17	Various	Per vehicle
Bus Murals	Pattison	16	Various	Per vehicle
Ultra Tails	Pattison	16	Various	Per vehicle
Subway/Terminal				
Electronic Displays	Alstom Télécite	1	12" x 40"	# of seconds
Station Domination	CBS Outdoor Canada	1	Various	Location Buy
Subway Posters	CBS Outdoor Canada	1	6' x 4'	GRPs
Interior Vertical Subway Posters	CBS Outdoor Canada	1	28" x 20"	GRPs/%Showing
Ferry Terminal Posters	Day Nite Media Sales	1	Various	# of posters
Station Domination	Exclusive Advertising	1	Various	Location Buy
Station Domination	Pattison	2	Various	Per Sq. Ft/Various
Interior Vertical Posters	Lamar Transit Advertising	1	70.75" x 45"	# of posters
Subway Kings	Métromédia Plus	1	139" x 30"	# of posters
Platform Poster	Métromédia Plus	1	144" x 66"	# of posters
Backlit Station Poster	Métromédia Plus	1	48" x 72"	# of posters
Super Vertical Poster	Métromédia Plus	1	12'x16'	# of posters
Station Wraps	Métromédia Plus	1	Various	Location Buy
Digital	Métromédia Plus	1	N/A	# of Seconds
Digital	Onestop Network	2	n/a	# of seconds
Station Posters	Pattison	2	Various	# of posters
Ferry Terminal Posters	Pattison	6	Various	# of Posters
Ferry Terminal Display	Pattison	2	Various	Per Terminal/Day
TAXI				
Cab tops	Canada's CabAds	8	Various	# of vehicles
Taxi Headrest Screens	Kick Media Marketing Solutions	1	n/a	# of vehicles
TRANSIT SHELTERS				
Transit Shelter	Day Nite Media Sales	4	4' x 6'	Location Buy
Transit Shelter	le Groupe Imagi Communication	4	n/a	Location Buy
Transit Shelter	North Bay Transit	1	4' x 6'	Location Buy
VEHICLE WRAPS				
Wraps	21st Century Advertising	1	Various	# of vehicles
Wraps	CBS Outdoor Canada	3	Various	# of vehicles
Wraps	Exclusive Advertising	1	Various	# of vehicles
Wraps	Greyhoundmedia/Gam	2	Various	# of vehicles
Wraps	le Groupe Imagi Communication	1	Various	# of vehicles
Wraps	Métromédia Plus	8	Various	# of vehicles
Wraps	Pattison	14	Various	# of vehicles
Wraps	Peterborough Transit	1	Various	# of vehicles
Taxi Wraps	Taxi Art Media	1	Various	# of vehicles
Train Wraps	WestPalm	1	Various	# of vehicles

TRANSIT USER BREAKDOWN

Average minutes spent commuting by Transit (one-way)	Adults 18 +	Adults 18 - 24	Adults 25 - 49
TORONTO	36	35	36
VANCOUVER	35	39	35
MONTREAL	34	32	34

Source: BBM RTS Spring 2009

4 WEEK TRANSIT REACH AND FREQUENCY SCHEDULE

Based on 25 Daily GRPs for a variety of Transit Advertising Products

Mixed Buy Transit R/F Report											
Operator	Territory	12+ Pop'n (000)	Transit System	Product	Posters	All Persons 12+			All Persons 25 to 54		
						GRPs/Wk	Impr/wk	4Wks	GRPs/wk	Impr/wk	4wks
Metro	Montreal CMA	3250	bus	King (30" x 139")	281	350	11375	76/18.5	398	6824	90%+
Media Plus				Seventy (21" x 70")	351	350	11375	70/19.9	398	6824	90%+
				Standard Interior (11" x 35")	2791	350	11375	38/36.8	310	5314	90%+
				Metro Standard Interior (20" x 28")	1330	350	11375	34/41.4	369	6330	90%+
				Mix		1400	45501	99/56.6	1475	25292	90%+
CBS	Toronto CMA	4704.8	bus/streetcar	King (30" x 139")	407	350	16467	78/18.0	409	10545	90%+
				Seventy (21" x 70")	508	350	16467	73/19.3	409	10545	90%+
				Standard Interior (11" x 35")	3325	350	16467	38/36.9	304	7838	90%+
				Standard Interior (11" x 35")	2692	350	16467	34/40.7	347	8950	90%+
				Mix		1400	65868	99/56.6	1468	37877	90%+
Pattison	Calgary CMA	955.3	bus	King (30" x 139")	84	350	3343	73/19.3	389	2115	90%+
				Seventy (21" x 70")	105	350	3343	67/20.8	389	2115	90%+
				Standard Interior (11" x 35")	1071	350	3343	30/46.5	309	1677	90%+
				C-Train Standard Interior (11" x 35")	415	350	3343	25/55.8	326	1773	90%+
				Mix		1400	13374	99/56.6	1413	7680	90%+
Lamar	Vancouver CMA	2006.8	bus	King (30" x 139")	174	350	7024	77/18.2	391	4253	90%+
				Seventy (21" x 70") (11" x 35")	217	350	7024	71/19.6	391	4253	90%+
				Standard Interior	1603	350	7024	40/35.4	288	3126	90%+
				Standard Interior (11" x 35")	1728	350	7024	26/53.8	345	3753	90%+
				Mix		1400	28095	99/56.6	1416	15385	90%+

Other markets available include: Halifax, Quebec city, London, Oakville, Edmonton, Victoria, Ottawa and Winnipeg. Other products and demographics available please contact one of the member companies: CBS Outdoor, Lamar, Metro Media Plus, Pattison Outdoor or OMAC, for more information. Source: BBM RTS Fall '08

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@amccanada.ca
 omaccanada.ca/amccanada.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.

A MESSAGE FROM



STIMULATE. INNOVATE. TRANSFORM. RESET. REPEAT. STIMULATE. INNOVATE. TRANSFORM. RESET. REPEAT. (FASTER)

SUCH IS THE STATE OF TODAY'S INTERACTIVE ADVERTISING LANDSCAPE...

And although the pace of change may seem overwhelming, fortunately, by following just a few simple principles, it's easy to maximize advertiser investment within the Interactive arena.

PRINCIPLE 1: Follow The Consumer

According to a review of PMB, NADbank and BBM/RTS, the Internet is now the #1 media in terms of time spent for 18-34 year-olds, and will be for all 18-49 year-olds within 8 years. The Internet provides a "mirror image" of the age profile of other media. This is particularly true for the Internet vs. TV. So, shifting a portion of the budget from TV to the Internet will help balance media weight across age groups.

PRINCIPLE 2: Understand The Internet Imperative

Recent research by Rob Young, Sr. VP Planning Services, PHD Canada, utilizing data from PMB's 2008 study, indicates Internet Imperatives (consumers who are heavy Internet users, but only light TV users), are prime prospects for upscale consumer products, and index higher than each of TV Imperatives (consumers who are heavy TV users, but only light Internet users), Dual Light TV/Internet and Dual Heavy TV/Internet users as:

- Consumers who spend \$1,500+ monthly on credit cards
- Consumers who own \$5,000+ Personal Computing systems
- Consumers who make \$10,000+ RRSP contributions annually
- Consumers who own or recently purchased a new, \$50,000+ car
- Consumers who spent \$50,000+ in Home improvements in past year

PRINCIPLE 3: Use Display + Search Advertising To Maximize Online + Offline Sales

According to a recent comScore Media Metrix study, because the overall number of unique people reached by Display is so much higher than other Online advertising formats, the total dollars in sales generated by Display advertising is actually very large—as even a small purchase lift acts across such

a large base. And, even when products were available Online, of the total sales attributed to Display advertising, a full 68% actually occurred offline. Drive still more sales by exploiting Display and Search synergies. In their 2008 Digital Outlook Report, Avenue A | Razorfish showed previous exposure to a Display banner increased the likelihood users would enter a branded Search query vs. an unbranded one by 55%. In a similar study by the Atlas Institute, users who clicked on Search ads who were also exposed to Display ads, were 56% more likely to purchase from their client, Alltel Wireless.

PRINCIPLE 4: Drive Engagement + ROI Through Social Media Marketing

A recent Wetpaint/Altimeter study found that the most valuable brands in the world are experiencing a direct correlation between top financial performance and deep social media engagement. Socially engaged companies (those brands who have dedicated social media teams, are engaged in seven or more channels, and also make Social Media a core go-to-market strategy), experienced an average increase in revenue growth of 18% in the past year vs. "Wallflowers" who actually experienced a 6% decrease in revenues.

PRINCIPLE 5: Create Cross-Platform Programs Including Online Video + Mobile

A new study by CNN International has found that despite high cross-over between audiences of all CNN properties, users are in a different state of mind when Online or using a Mobile device vs. watching TV. As a result, one in five consumers who were exposed to TV advertising for a well known financial institution were spontaneously able to recall the brand advertised. But, when Online and Mobile advertising were added, this figure rose to one in three.

The Interactive Advertising Bureau of Canada (www.iabcanada.com) is the national voice and de facto thought leader of the Canadian Interactive marketing and advertising industry, and is a not-for-profit association representing a membership composed of Advertisers, Agencies, Publishers and Interactive Service Associates.

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

Internet & Mobile Media

MOBILE MEDIA USERS

Wireless phone penetration among A18-34	73%
Wireless phone penetration among A35-54	66%
Wireless phone penetration among T16-17	65%
Households with access to a wireless phone	72%
Penetration in major urban centres	70%
Wireless phones being used mostly for personal use	61%
Wireless phones being used mostly for business use	27%

Source: CWTA - 2008 Attitudes Towards Wireless Study

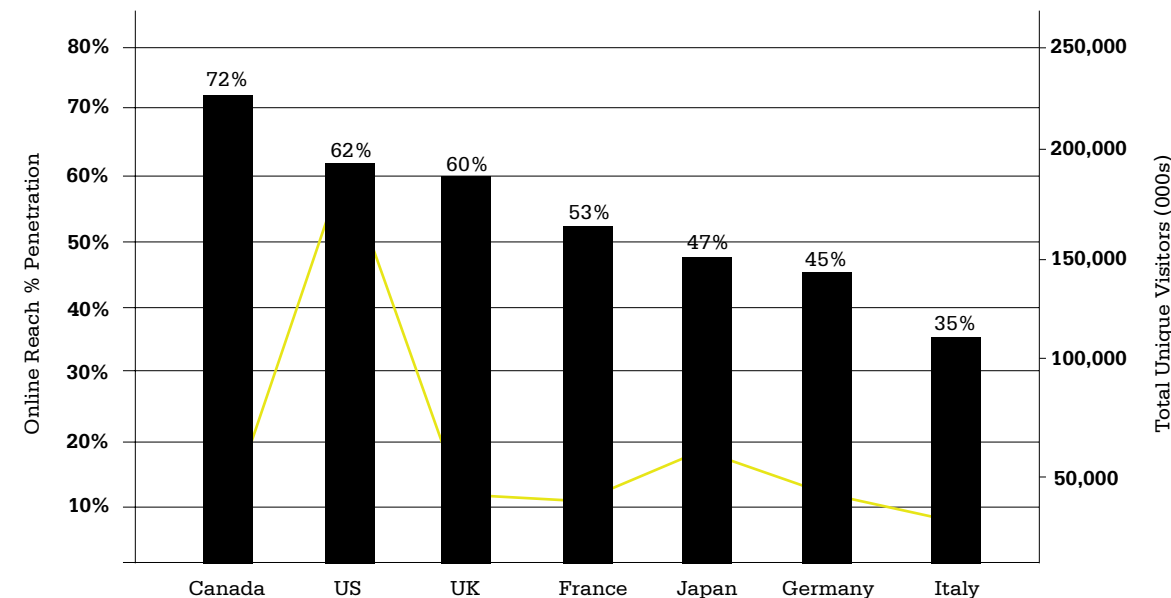
THE INTERNET IN CANADA

Even with slowing growth in audience, Canada continues to be one of the most connected countries in the world, making the Internet an ever more important media channel to reach consumers. With an audience of just over 24,000,000, Canada remains one of the leading countries in broadband access. Also having one of the highest broadband penetration rates in the world allows for an "always on" experience, further reinforcing the importance of this medium to reach Canadian consumers. With the growth of mediums such as mobile devices, video, gaming, social network sites and the ability to access

online content from anywhere, Canadians continue to be the heaviest internet users in the world. An average of 45.5 hours are spent online per month for Canadians, while the world wide average is 26 hours.

WEB ADVERTISING IN CANADA

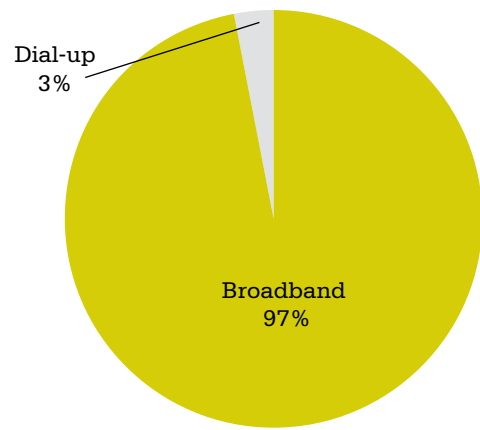
ADVERTISING NETWORKS
 Networks are made up of multiple sites and can be purchased on either a cost-per-click or a cost-per-acquisition model. They also allow media buyers to optimize their campaigns by increasing the activity on those sites that perform the best and limiting activity on the sites that don't perform.



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

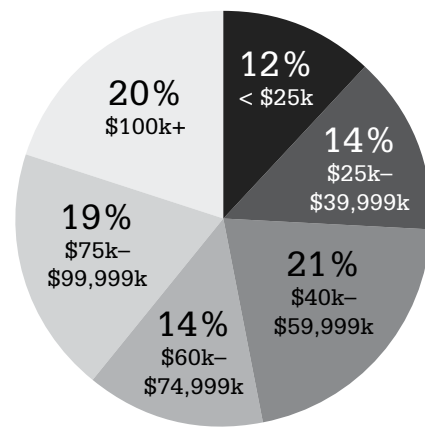
■ Online Population ■ Online Reach

% Compoaltion Unique Visitors - Connection Speed



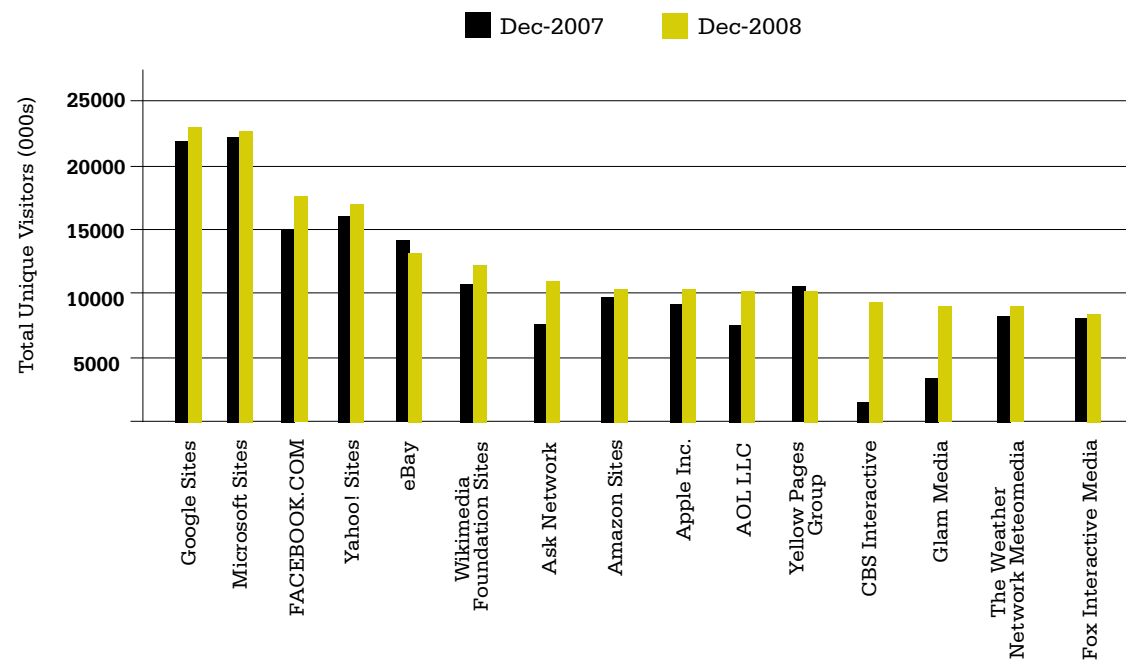
Source: comScore Media Metrix, (Canada), Persons 2+, Dec 2008
Connection Speed- Home Location Only

Total Unique Visits by Household Income



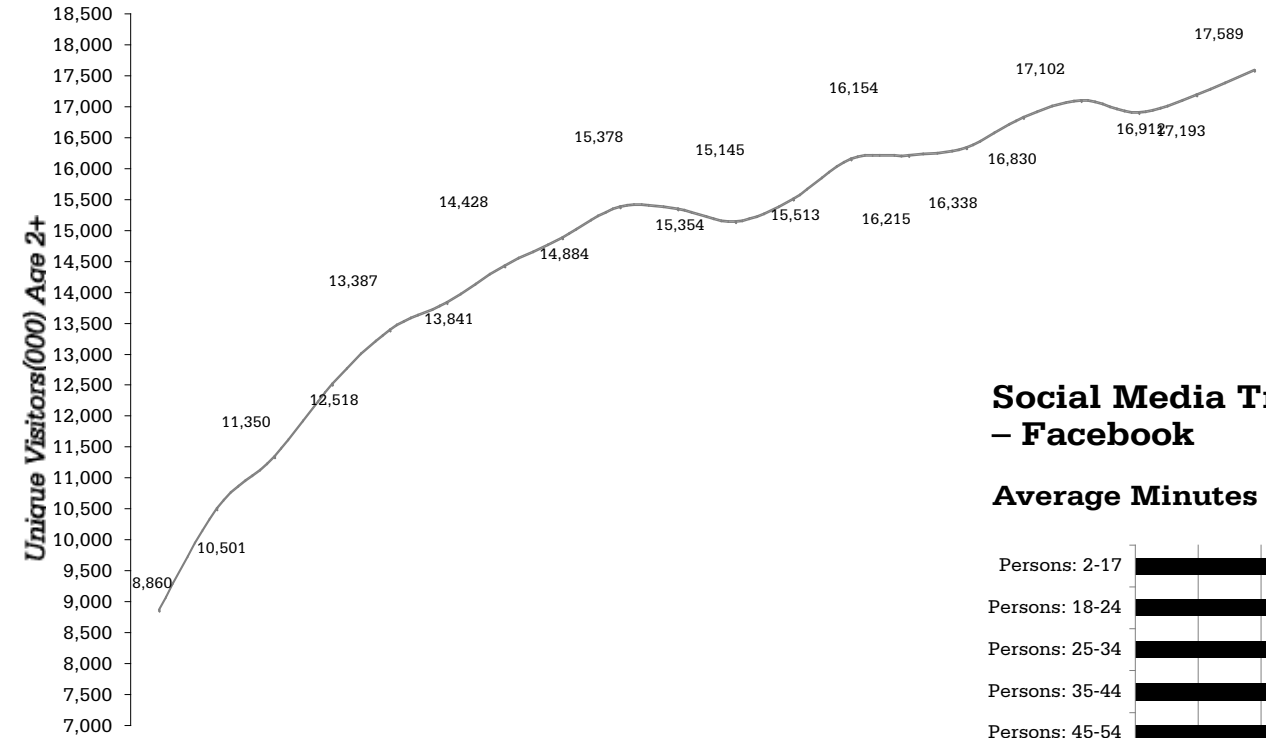
Source: comScore Inc. Canada, May 2009

Top Properties



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

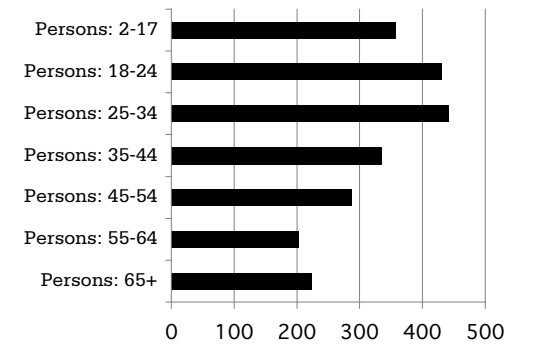
Facebook.com April 2007 to November 2008



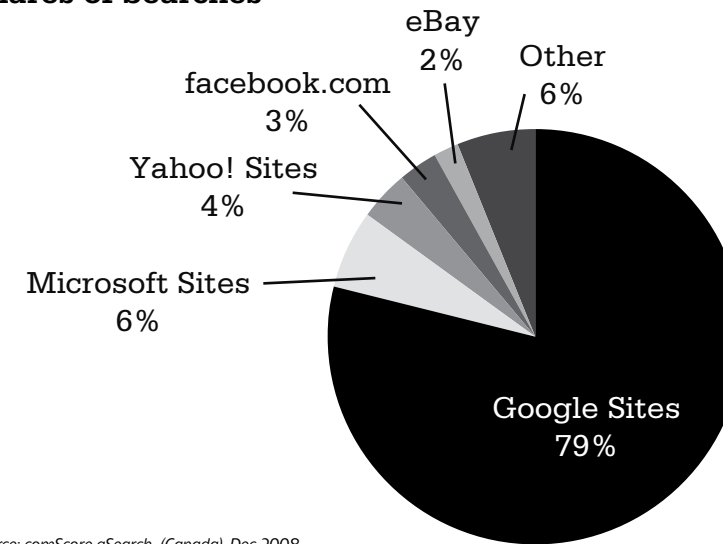
Source: comScore Canada November 2008

Social Media Trends - Facebook

Average Minutes per Visitor

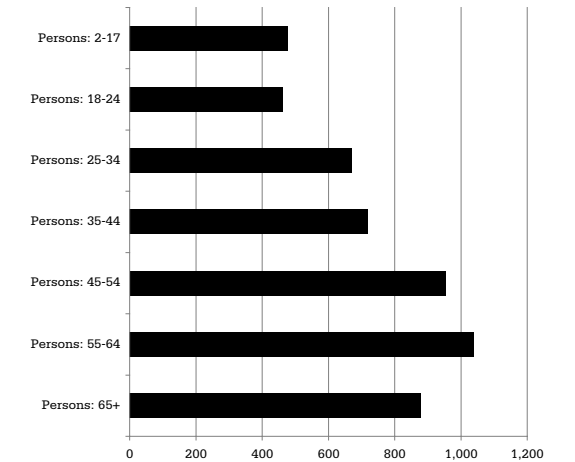


Search Market in Canada Shares of Searches



Source: comScore qSearch, (Canada), Dec 2008

Average Pages per Visitor



EMAIL MARKETING

This type of marketing takes advantage of email lists of subscribers to newsletters and/or messages and opportunities from sponsors. Quality lists are generally those that are opt-in only and are updated frequently. They tend to be niche and highly targeted by age, location, gender, income, occupation and interests. Response rates tend to be high due to the fact that the audience is usually qualified.

SITE SPECIFIC PLACEMENT

Individual web sites are chosen based on demographics, audience size, content/environment

and value. There are typically two types of sites that would be selected—mass reach portals and niche sites.

SPONSORSHIPS

These partnerships are used to create synergy between brands and can lend credibility by joining with an established and trusted brand. The most common online sponsorships are homepage placements, roadblocks, website sponsorships and content integration

SOCIAL MEDIA

17,000,000+ Canadians visit Facebook.com

monthly and the popularity of social networks only continues to grow as new sites join the mix. Once thought of as just the realm of the young, these networks are now seeing users across a broad demographic spectrum with men, women, older and wealthier segments of the population now represented. These sites offer various opportunities from text ads and banners to fan pages and branded channels.

ONLINE VIDEO/BROADCASTING

With the popularity growing amongst sites like Youtube and the increasing number of TV properties broadcasting entire shows online, online

video has become an area where Canadians spend an increasing amount of time. Opportunities for video include pre-roll, in-video, adjacent in-banner, sponsored content, etc.

SEARCH

SEM (search engine marketing) advertising is used to take advantage of those consumers that are searching for info on products and services. Ads consist of text links served up on search engines based on pre-selected keyword lists. When a user types in a query the search engine then matches the words to the keywords of various advertisers and a text ad

is served in the paid listings at the top or side margin of the page. Unlike the organic listings, SEM allows the advertiser to control the message that is served to a particular query, often increasing relevancy and the chance of a click through. Search is based on a cost-per-click model, therefore, advertisers only pay for those ads that are clicked on.

CREATIVE OPTIONS

There are three standard units that are currently used:

- Big Box (300W x 250L pixels)
- Skyscraper (120W x 600L or 160W x 600L

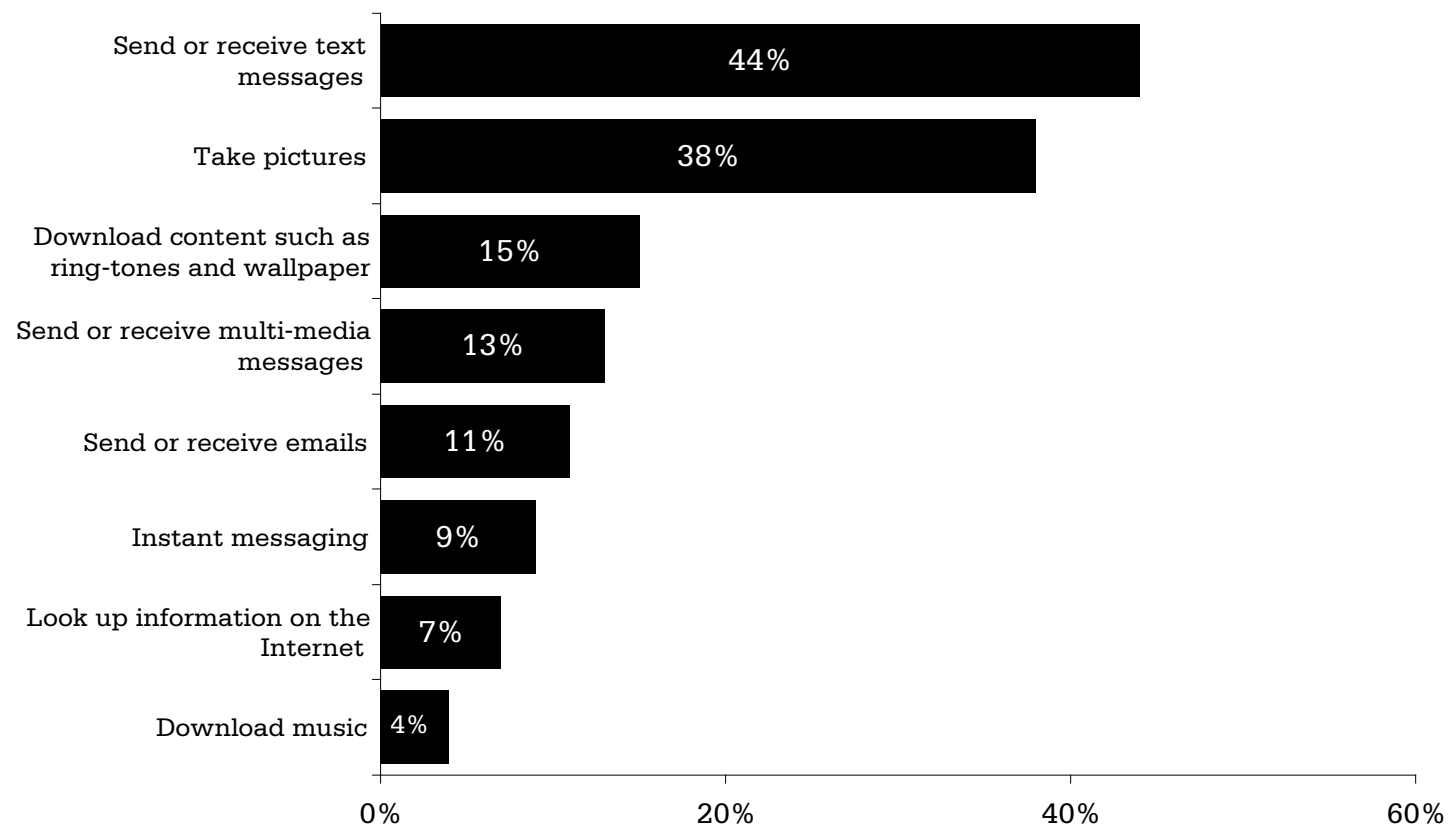
pixels)

- Leaderboard (728W x 90L pixels)

Rich Media and Video are ad units that use advanced technology to deliver a more engaging experience to the user. They are designed to increase and measure the interactivity with the brand like video views, game plays, sign-up etc. Can include such things as expandable banners, interactive banners, vokens, cross-talk banners, pre-roll video, in-banner video, widgets or "ticker" ads.

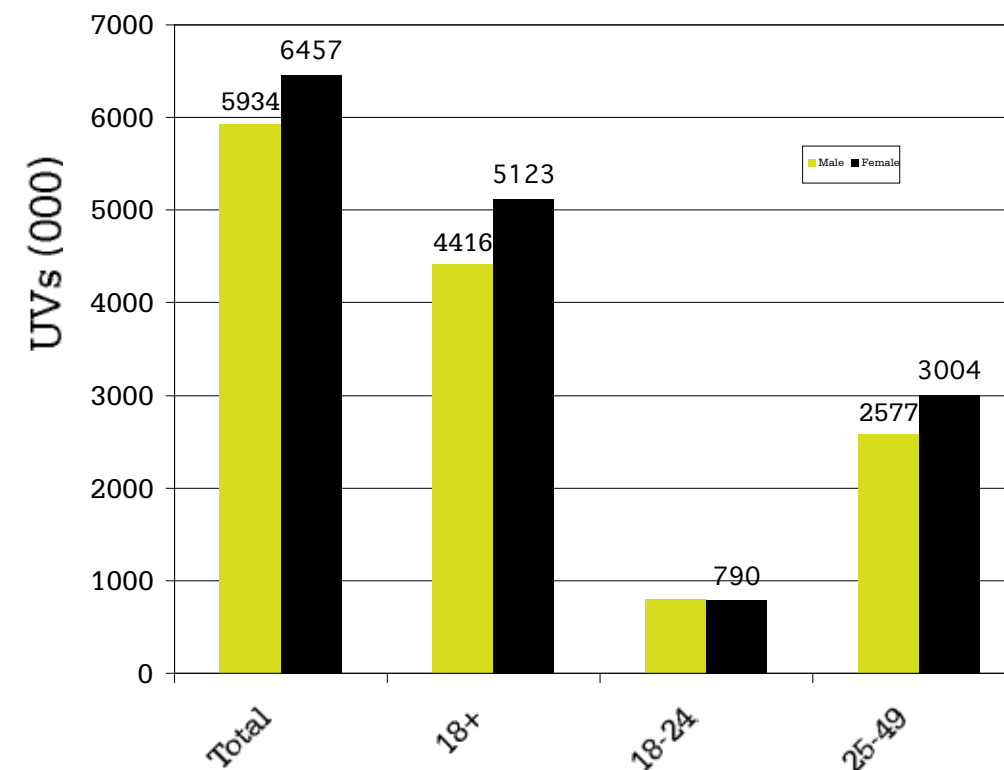
Text Ads are made up solely of text and a clickable link. They are used to drive traffic to the

Usage of features among Canadians who have access to cellular phones



Source: CWTA – 2008 Attitudes Towards Wireless Study

Canadian Adults Play Video Games November 2008 – Visit and/or Play PC Games Site Online



Sources: comScore November 2008, Simmons Research, 2006 Adult Study and ESAC 2006 Report (Entertainment Software Association of Canada)

- 52% of all Canadian adults played a PC Game online in November 2008
- An avg. of 2,928,000 played every day
- Slightly more women than men – 52%
- For any game play (PC or Console) the average game player age in Canada is 33
- 31% are under age 18
- 44% are 18-49
- 25% are 50+

advertiser's site. They are typically low in cost and use simple messaging. Often the ads can appear to be content on the site, increasing their effectiveness.

MOBILE MEDIA

Over the past 20 years, wireless products have grown to become an essential factor in the lives of Canadians. Due to the aggressive competition, marketing and strong customer service, the industry generated more than \$12 billion in 2007. Another reason for the success of wireless products is the industry's willingness to provide Canadian's with what they want, such as inter-carrier text messaging, common short codes and Wi-Fi hotspots.

Mobile phones are considered one of the fastest growing products in history, with 21.5 million Canadian wireless phone subscribers at a national penetration rate of 67% as of December

2008. Canada is a world leader in communication networks and technology and now offers coverage to more than 98% of Canadians. SMS penetration continues to grow. However, the increased usage of advanced wireless data services, particularly mobile Internet browsing and multimedia messaging services, are used by less than one-fifth of Canadian wireless consumers.

Although the overall price of wireless services is among the most talked about topics in the industry, the lack of unlimited wireless data plans is a the most significant impediment to increased acceptance of wireless data services.

MOBILE WEB

- Mobile web sites are specifically designed to be viewed on mobile devices such as mobile phones and PDAs. Compared to a typical Web site, a mobile Web site will have a min-

imal amount of graphics and text.

- Wireless Application Protocol (WAP): World standard for the presentation and delivery of wireless information and services on mobile phones and other wireless terminals.
- Mobile web offers users access to: mobile sites, applications (games, maps, video content), text and multimedia messaging services.
- Demographics: skew higher for male users, and overall users are generally in the 18-44 year old age group (25-34 bull's eye). Large disposal income, 38% earning over \$75K and 22% earning over \$100K+.
- 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.

Both ad banners and ad full-page images may be active and link to either to places inside the application or to outside the application through links.

TEXT MESSAGING

- Text Message or SMS (Short Message Service) allows mobile customers to send, receive and view short text messages.
- Advantages:
 - Allow to POP solutions.
 - Ability to measure the interaction-how many people received and redeemed the coupon.
- Offer as a consumer engagement tool.
- Reach a more pressed-for-time, hyper-tasking, highly mobile consumer.
- Short Codes are new way to use Text Messaging that lets 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 often spell a word or brand name. I.e: "72346" spells "RADIO" and could be used to request or vote for a song.
- Short Codes are administered by the CWTA.
- Consumers only receive information that they have requested.

MULTIMEDIA MESSAGING SERVICES (MMS)

- Rich media equivalent to short message services (SMS) text message.
- Can include images, video and sound.
- Media publishers are beginning to use MMS to distribute mobile content. I.e: CBS News, FOX25.
- MMS Response Capabilities
 - Message-based responses: opt-in receive messages, text in to vote, win
 - Call-based responses: call in to vote, buy, renew

WAP (Wireless Application Protocol) landing page; a subscriber can click on a WAP link and be directed to another WAP site

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.
- Bluetooth technology is anticipated to provide greater bandwidth and distances.
- Consumers need to have Bluetooth turned on in order to receive content.
- Broadcasters can broadcast any content supported by mobile phones such as text, images, video, audio, games, smart messaging service (SMS).
- How does it work: The consumer receives a request for permission

from broadcaster (advertiser or retailer) The consumer gives permission to the broadcaster to send the content, so it can be downloaded automatically to the mobile phone/device

IN-GAME ADVERTISING

- In-game advertising refers to the use of computer and video games as a medium in which advertising is delivered.
- 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.
- Ads:
 - Advergame: It integrates the brand or brand messaging into the game experience.
 - In-Game Advertising: Incorporates advertisements into a complete game. These ads may be related to the game play such as drinking

a branded pop or banners placed within an environment.

- Static In-Game advertising: Virtual billboards placed directly into the game by artists or programmers.

Dynamic In-Game advertising: Can be altered remotely and tailored accordingly to geographical location or time of day.

IN-GAME MAIN LEADERS

- Massive: (<http://advertising.microsoft.com>)
 - Allows marketers to reach and engage gamers playing Xbox and PC games
 - Ads are delivered across a network of top-selling video games in real-time while gamers are engaged in gameplay.
- IGN: (<http://corp.ign.com>)
 - Online provider of videogame, entertainment and lifestyle content, as well as community and interactive services through the Sony Playstation and PC-based games.

- Google: (www accuracast.com)
 - Offers in-game advertising service through the AdSense platform for in PC-based games and around PC based games.
- IGA: (www.igaworldwide.com)
 - Facilitates advertisers to target millions of consumers playing games across a wide range of gaming platforms and genres.
 - Provider for Playstation and is partnered with leading game companies such as Electronic Arts.
- NeoEdge : (<http://www.neoedge.com>)
 - Enables large format, high quality ads to be inserted into casual games.
 - Partnered with Yahoo, Lycos and other major portals.
- Double Fusion: (www.doublefusion.com) (Not in Canada))
 - Provides marketers and their advertising agencies with in-game, around-game and web-based solutions.

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

Phone: (416) 682-1047
Fax: (416) 682-1050
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.advertising.aol.ca

Company Name:
AOL Advertising
Parent Company:
AOL Canada Corp.

Address: 55 St. Clair
Avenue West, 7th
Floor, Toronto, ON,
M4V 2Y7

Tel: 416-960-6618
Fax: 416-960-6502
Toll-free: 1-888-274-2790
Contact: Marshall Self,
Director of Sales
marshall.self@corp.aol.com

Traffic	Website Profile	User Profile	Ad Rates	Inventory
<p>Unique Visitors: 22.2 Million/Month</p> <p>Page Views: 7.2 Billion/Month (as per July 2008 com-Score MediaMetrix)</p>	<p>AOL Advertising makes it easier than ever for advertisers to harness the full power of digital media to meet their marketing objectives. AOL Advertising offers best-in-class solutions that leverage AOL's premier consumer brands (MapQuest, AOL Music, Moviefone, Spinner, That's Fit and more), Third Party Partner (Canadian Driver) and Advertising.com's industry-leading reach across multiple networks including display, video, mobile search and affiliate.</p>	<p>AOL Advertising reaches 90.5% of Canadian Online users. Combining that reach with industry leading targeting and optimization technologies allows you to position your message within the most relevant online content and efficiently reach your desired audience.</p>	<p>Specifications vary. Contact an AOL Advertising sales rep for a customized proposal.</p>	<p>Ad Units: Display, Rich Media, Video, Mobile, Affiliate, Text, Search, Performance, Integration and Sponsorship; Targeting: Behavioural, Retargeting, Geographic, Demographic, Daypart, Content Channels, Frequency Capping</p>



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: Dorothy Clark
dorothy.clark@casalemedia.com

Traffic	Website Profile	User Profile	Ad Rates	Inventory
<p>Unique Visitors: 21,785,000/Month</p> <p>Page Views: 4,905,000,000/Month</p>	<p>MediaNet® reaches 90% of the Canadian online audience through its select collection of 3,000 actively monitored premium websites including the biggest brand name publications in every major vertical. MediaNet® is a 100% direct, 100% transparent, fully optimized, Brand Safe® environment trusted by leading international brands and media agencies.</p>	<p>MediaNet® provides brands with massive 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.</p>	<p>Banners, towers, rectangles, vokens; in-banner video/expandable rich media; over 1 billion ads delivered daily. To inquire about rates, volumes and how to advertiser with us, please call 416-785-5908.</p>	<ul style="list-style-type: none"> Rich media



www.eyeweekly.com

Company Name: EYE WEEKLY
Parent Company: Toronto Star Newspapers Ltd.
Address: 625 Church Street Toronto, ON M4Y 2G1

Contact: Kristie Painting, Olive Media info@olivemedia.ca
Tel: 416-687-5700

Traffic*	Website Profile	User Profile**	Ad Rates	Inventory
<p>Unique Visitors: 180,000/Month</p> <p>Email Subscribers: 10,000</p>	<p>EYE WEEKLY.com is the interactive resource for urban lifestyle explorers exploring cultural activity in Toronto. Daily irreverent coverage of Toronto's most engaging people and events, exclusive video of concerts in Toronto's hottest clubs, and the city's most comprehensive events database come together to create an indispensable website for Toronto's culturally infused community.</p>	<p>Upwardly mobile Toronto trendsetters:</p> <ul style="list-style-type: none"> • 36% are between 18-34 yrs old • 70% are between 18-49 yrs old • 57% male • 64% have HHI \$60,000+ • 66%† of readers have visited an advertiser's web site after seeing it in EYE WEEKLY/eyeweekly.com • 65%† of readers have researched or made a purchase as a result of seeing a product advertised via EYE WEEKLY/eyeweekly.com 	<p>ROS display campaigns, contests, e-newsletter, micro-sites, section takeovers, section sponsorships and custom-ized programs, quoted upon request.</p>	<p>All IAB standard units plus:</p> <ul style="list-style-type: none"> • Promotions & contests • Mobile opportunities • Rich media & expandable units • e-newsletter marketing • Micro-sites and other customized options available.

*Google Analytics, July 2009
 **Audited. Comscore, June '09
 †User Survey May, 2009



www.adreach.ca

Company Name: Ad*Reach
Parent Company: Ontario Community Newspapers Association.
Address: 103-3050 Harvester Road Burlington, ON L7N 3J1

Tel: 416-350-2107
Fax: 905-639-6962
Contact: Minna Schmidt, Sales Manager, m.schmidt@ocna.org

Traffic	Website Profile	User Profile	Ad Rates	Inventory
<p>Page Views: 12 million/Month</p>	<p>AdReach Ontario is the respected sales and marketing division of the Ontario Community Newspapers Association, representing more than 300 newspapers in Ontario. AdReach assists planners to coordinate campaigns across Ontario's Community Newspapers in a convenient one order, one bill program. In addition to print advertising, AdReach began offering banner ad space on member's newspaper sites in 2009. The Community News sites are grouped by geographic zone (e.g. Northwest Ontario, Metro Toronto, Niagara) which offers advertisers geographic penetration in one simple buy.</p>	<p>Community Newspapers have always attracted loyal readers interested in hyper-local news and information about their communities. Visitors to newspaper's Community News Sites are the same as the print readers as well as non-traditional newspaper readers seeking relevant and reliable information about specific communities.</p>	<p>Leaderboard ads available in one or a combination of regional zones across Ontario. Call Minna 416-350-2107 ext.22 for rates or visit adreach.ca for rate card</p>	<ul style="list-style-type: none"> • Animation • Banner Ads • Rich media

www.apf.ca
www.francopresse.ca

Company Name: Association de la presse francophone
Address: 267 rue Dalhousie Ottawa, ON K1N 7E3

Tel: 613-241-1017
Fax: 613-241-6313
Toll-free: 1-800-267-7266
Contact: Murielle Guerrette apf@apf.ca

Traffic	Website Profile	User Profile	Ad Rates	Inventory
<p>Page Views: The websites www.apf.ca and www.francopresse.ca, which reach all parts of French-speaking Canada, have 25000 visitors and 370000 page views per month.</p>	<p>The websites www.apf.ca and www.francopresse.ca include 24 community newspapers from outside Québec. These websites bring together French-language newspapers from across Canada.</p> <p>They offer excellent visibility to anyone wishing to reach all parts of French-speaking Canada.</p>	<p>The websites www.apf.ca and www.francopresse.ca are among the most visited sites in minority francophone communities across Canada.</p>	<p>For information on our Web banners, visit www.apf.ca or www.francopresse.ca (Advertising tab) or contact us at apf@apf.ca or at (613) 241-1017.</p>	<ul style="list-style-type: none"> • Online ad space available • Links • Other: cross-Canada classified ads, sponsorship of an excellence awards gala

THE GLOBE AND MAIL **www.globeandmail.com**

Company Name: The Globe and Mail
Parent Company: CTVglobemedia Publishing Inc.
Address: 444 Front Street West Toronto, ON L3Y 1H1

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

Traffic	Website Profile	User Profile	Ad Rates	Inventory
<p>Unique Visitors: 6,508,849/Month</p> <p>Page Views: 123,962,906/Month</p> <p>Average Visit Length: 12.79 minutes</p>	<p>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 globeinvestor-gold.com, which provides access to additional Globe and Mail content and databases, and features such as past newspaper page pdfs and articles. Several site enhancements (TBA) are planned for the fall of 2009.</p>	<p>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:</p> <ul style="list-style-type: none"> • 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 118 National Newspaper Awards, since the awards were established in 1949. 	<p>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.</p>	<ul style="list-style-type: none"> • 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



www.torstardigital.com

Company Name: Torstar Digital
Parent Company: Torstar Corporation
Address: 590 King St. West, Suite 400 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
<p>Through Olive Media, its online advertising sales company, Torstar Digital has the ability to reach over 14 million unique visitors and deliver 180 million page views per month.</p>	<p>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.</p>	<p>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.</p>	<p>To inquire about how you can advertise with us, email info@olivemedia.ca</p>	<p>Banner Ads, Button Ads, Co-branding, Content Integration, Contests, E-mail Marketing, E-Newsletter Sponsorship, Research, Rich Media, Special Events, Sponsorships, Text Links, Tower Ads, Video</p>



www.tribalfusion.com

Company Name: Tribal Fusion
Address: 318 Wellington St. W #610
Parent Company: Exponential Interactive Inc.
Address: Toronto, ON M5V 3T4

Tel: 416-979-4358
Cell: 510-847-9922
Fax: 647-436-5023
Contact: Anne Mains
 anne.mains@tribalfusion-corp.com

Traffic	Website Profile	User Profile	Ad Rates	Inventory
<p>Page Views: 1.8 Billion/Month</p>	<p>With industry leading optimization technology, a 100% transparent site list, and a premium publisher network of over 2000 high-quality sites, Tribal Fusion is a digital marketing solutions company that creates fully customized advertising campaigns to help companies capitalize on opportunities at every level of the consumer decision process.</p>	<p>Tribal Fusion reaches over 70% of all Canadians online across 100+ content channels which reach nearly every audience segment both large and small.</p>	<p>For a listing of advertising opportunities, please visit www.tribalfusion.com. Rates vary based on targeting options. Please call 416-979-4358 for information specific to your advertising needs.</p>	<p>Banner Ads, Button Ads, Content Integration, Interstitials, Micro sites, Dynamic Ads, Rich Media, Sponsorships, Site Skins, Text Links, Tower Ads, Video, Research</p>



www.yellowpages.ca

Company Name: Yellow Pages
Address: 16 Place du Commerce Verdon, QC H3E 2A5
Parent Company: Yellow Pages Income Fund

Tel: 416-412-5724
Fax: 416-412-5798
Contact: Victoria Hart, National Sales
 victoria.hart@ypg.com

Traffic	Website Profile	User Profile	Ad Rates	Inventory
<p>Page Views: 75 Million/Month</p> <p>Unique Visits: 6.9 Million/Month</p> <p>Reach: 28% of online Canadians</p>	<p>Yellow Pages Group owns the leading network of directory websites in Canada including YellowPages.ca™ and Canada411.ca™ as well as the CanadaPlus.ca™ network – a leader in the local city sites market.</p>	<p>Online Canadians ready-to-buy and looking for local businesses that best meet their needs.</p>	<p>Placement on our network of sites, with rich media options available, including video. Content integration, microsites and more. Contact Yellow Pages Group for details.</p>	<ul style="list-style-type: none"> • Content Integration • Micro Sites • Rich Media • Text Links • Video • PPC/SEM

Direct Response Marketing

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 five 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 on additional products or services when they respond.

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 as 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 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 is typically bought on a 24-hour run of schedule (ROS) or blocks of day-parts (morning/afternoon, etc.) basis. This inventory is predominantly remnant air time that is sold on a pre-emptable basis and the cost per spot is usually 25-50% lower than traditional spot buys. Short form TV commercials can be 15, 30, 60, 90 and 120 seconds in length. Long form commercials, 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. It 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 high volume of calls coming in 24 hours a day. Many potential customers will spend no more than 1-3 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.

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 rely 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 to houses and/or apartments and one day a week, usually Friday or Saturday.

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

TMC DISTRIBUTORS

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

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

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

4. UNADDRESSED ADMAIL: Canada Post delivery to houses and/or apartments and/or businesses. Published five days a week but with a three-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 Distributors 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.

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

Media Software & Data Services

ACNEILSEN COMPANY OF CANADA

160 McNabb St.
Markham, ON L3R 4B8
Phone: (905) 475-3344
Fax: (905) 475-8357
neilsen.ca

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

NEILSEN MEDIA RESEARCH CANADA

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

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

ADTRAQ/CO HARRIS SOFTWARE SYSTEMS

25 Dyas Rd.
Toronto, ON M3B 1V7
Phone: (416) 445-9640
Fax: (416) 443-3088

ADTRAQ/CO HARRIS SOFTWARE SYSTEMS LES SYSTÈMES INFORMATIQUES HARRIS

390 rue Lemoyne
Montreal, QC H2Y 1Y3

Phone : (514) 842-0101
Fax : (514) 842-0111
Adtraq provides a tracking system for media purchase administration.

MIJO

633 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.

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 OOH.

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.

ELODA

424 Saint-Francois-Xavier St.
Montreal, QC H2Y 2S9
Phone: (514) 842-1513
Fax: 1-888-842-4002
eloda.com
TORONTO OFFICE NO LONGER EXISTS

Eloda provides measurement and proof-of-performance data.

FUIMUS CORPORATION

Advertising Agency Management Systems
349-1543 Bayview Ave.
Toronto, ON M4G 3B5
Phone & Fax: (416) 601-1744
Email: fuimus@fuimus.com
fuimus.com

Fuimus offers an advertising agency management software system (AAMS).

NIELSEN IMS (INTERACTIVE MARKET SYSTEMS)

20 Toronto Street Suite 860
Toronto, ON M5C 2B8
Phone: (416) 961-2840
Fax: (416) 644-3530

Montreal
Phone: (514) 240-3012
imsms.com/nielsen.com

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

**LEADING NATIONAL
ADVERTISERS – LNA
(DIVISION OF NIELSEN IMS)**

20 Toronto Street Suite 860
Toronto, ON M5C 2B8
Phone: (416) 644-3527
Fax: (416) 644-3537
imsms.com

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

**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

MISA provides media campaign data for the outdoor advertising industry.

MARKETRON

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

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

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 REAL MEDIA

161 Eglinton Ave. E., Suite 505
Toronto, ON M4P 1J5
Phone : (416) 966-2542
Fax: (416) 966-3097
247canada.com

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

**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.

**TNS MEDIA INTELLIGENCE/
EVALIANT**

8718 Royal Bluff Drive
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.

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.

Associations

Name	Phone	Toll Free	Fax	E-mail	Website
Advertising Agency Association of BC	(604) 687-7911		(604) 640-4343	Patty.jones@dDBCANADA.COM	www.aaabc.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 Newspapers Association	(780) 434-8746	1-800-282-6903	(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	1-800-565-0109	(416) 964-0771	scharles@acaweb.ca	www.acaweb.ca
Association des Agences de Publicité du Québec	(514) 848-1732	1-877-878-1732	(514) 848-1950	aapq@aapq.ca	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.bccommunitynews.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) 413-3870		(416) 413-3878	ccor rado@bes.ca	www.bes.ca
Bureau de Commercialisation de la Radio du Québec	(514) 528-0888		514-529-7225	info@bcrq.com	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 Association of Exposition Management	(416) 787-9377	1-866-441-9377	(416) 596-1808	info@caem.ca	www.caem.ca
Canadian Association of Fairs & Exhibitions	(613) 233-0012	1-800-663-1714	(613) 233-1154	info@canadian-fairs.ca	www.canadian-fairs.ca
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.communitynews.ca
Canadian Magazine Publishers Association	(416) 504-0274		(416) 504-0437		www.magazinescanada.ca
Canadian Marketing Association	(416) 391-2362		(416) 441-4062	info@the-cma.org	www.the-cma.org
Canadian Media Directors' Council (CMDC)	(416) 480-6656		n/a	cmdc_conference@ideaguys.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	1-800-866-1189	(416) 968-9396	abaker@comb.org	www.comb.org
ComBase	(416) 482-1090	1-800-481-6580	(416) 482-1908	kellylevson@combbase.ca	www.combase.ca
Le Conseil des Directeurs Médias du Québec	(450) 582-8165		(450)582-9339	info@cdmq.ca	www.cdmq.org
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.magazinescanada.ca
Manitoba Community Newspapers Association	(204) 947-1691	1-866-669-2262 Ext 3	(204) 947-1919	tanis@mcna.com	www.mcna.com
NADbank Inc.	(416) 923-3569		(416) 923-4002		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 Certifiée	(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	rcaron@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			wwsr@rogers.com	www.tcaan.ca
Western Association of Broadcasters		1-877-814-2719	1-877-814-2749	info@wab.ca	www.wab.ca

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.

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.

HAWTHORNE EFFECT A psychological phenomenon whereby people (customers) act differently when they are being studied.

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 BY MARKET (MBM) A classification of media scheduling, which puts an advertiser's marketing dollars against existing business in separate television markets.

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, 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 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.

BOOKENDS 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 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.

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.

PRIMEFRINGE/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 "piggyback" commercial.

SPOT TV Purchase of broadcast time on a station-by-station basis, i.e., non-network time. Sometimes referred to as Selective.

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.

TELETEXT Data transmission system that enables users to obtain and display pages of alphanumeric or graphic information. The system uses television channels, FM radio broadcasting, phone line circuits or a combination of the three.

TIERING Optional packages of pay-cable or basic cable services available to subscribers.

PRINT

ADNORM A term used by Starch 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.

BROADSHEET Full-size newspaper, approximately 13 inches wide by 22 inches deep, and 1,800 modular agate lines. Modified broadsheet size is usually 11 1/2 by 21 inches.

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.

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 of 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.

RUN OF PAPER OR RUN OF PRESS (ROP) 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 by 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.

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 edumericals. 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.

MODELLING 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 Corporation 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 which 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.

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: 300X 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 Webpage 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 ad which 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 which 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, intercommercial 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.

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 cookie browser or user resulting in one or more pulled text and/or graphics downloads from a site.

SESSION COOKIES Cookies which 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 Web site; 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 - wiki is 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 who establishes arrangements with existing mobile service operator(s) to resell pre-packaged or repackaged mobile wireless service plans. The MVNO handles its own customer care, billing, marketing and branding.

QR 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 features like e-mail, Internet and e-book 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.

Address Book

INTERNET



AOL Advertising

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MAGAZINE



Dialogue - Canadian Payroll Association

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OUT-OF-HOME



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Session #1: Tuesday, October 6, 2009

Theme: **CONTEXT**

- The evolving relationship with clients and the expectations of their agency partners
- Building business plans and developing successful partnerships

Session #2: Tuesday, October 27, 2009

Theme: **STRATEGY**

- Relationships between brand advertising and consumer behaviour
- Using principles of market, media research and consumer insights and metrics

Session #3: Tuesday, November 24, 2009

Theme: **EXECUTION**

- Gaining perspective and understanding of range of media selection
- Learn about transactions: negotiation tactics, better practices and procedures

Go to www.marketingmag.ca/digestlive for full agenda

Time: 7:30am - 11:45am

Place: Velma Rogers Theatre
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