

2016/17

Media Digest

A definitive source for the media marketplace

- **THE BUSINESS OF MEDIA:**

The latest stats and insights on traditional, digital and emerging media

- **MEDIA CHANNELS:**

Advertising spend in a slow economy

- **CONSUMER DATA AND TRENDS:**

Adapting to changes in the consumer landscape

MARKETING



Welcome to the Canadian Media Directors Council's 2016–2017 edition of the Media Digest.

Much thought and effort has been put into providing you an invaluable guide to help you navigate the continuously evolving world of media.

The media challenge today is that we need to deliver across the continuum, from communications planning right through to programmatic offerings—tasks that truly sit at opposite ends of the spectrum, or so you might think. The reality is that these and all the needs in-between are driven by two key factors—consumer behaviour and data.

Without a strong knowledge of their consumer base, marketers are lost. How will they know where to place their communications, what is the best angle for capturing attention and how will they develop strong relationships with their customers?

We need to know what is influencing consumer behaviour—just look at the Pokémon Go phenomenon. Who would have expected droves of adults (not just kids) to be stumbling through the streets capturing Pokémon creatures? Our Canadian media industry does (or at least tries to) forecast what today's trends are and how they will evolve. To that end, we have put together a number of pieces on Canadian consumers and the various media available to reach them, with perspective provided by the best of our CMDC leadership.

As we have all come to realize, data drives everything. And while you may look at tactics such as programmatic as a cheap and cheerful way of driving volume, the reality is that with the right data application, programmatic can be the strongest targeting tool in your arsenal. But to deploy this “weapon,” you need strong foundational data. That is true of every recommendation



a media planner makes and the only way a marketer should approve such a plan. It requires fact-based decision-making.

Within this guide, you will find a wealth of information to help you start the journey to making those fact-based decisions. A breadth of research, articles and information on everything from traditional television to experiential marketing to VR provides you with context to help frame your ideas and develop robust communications efforts.

The Media Digest is the work of many hands. Thanks to all those who contributed their time and knowledge to make this the best digest to date. ●



The Canadian Media Directors' Council is a non-profit industry body comprised of media agency CEOs representing advertising and media agencies working to enhance the effectiveness of marketing communications in Canada.

Our mission is to be a leading partner and marcom business adviser to our industry stakeholders by fully leveraging our resources and our sphere of influence to:

Expose high-value opportunities

Transform performance markers

Solve barriers to better results

We are a unique organization internationally in that we are a stand-alone media agency association focused on serving our client and agency community to ensure that the Canadian marketplace is a transparent and accountable place to do business.

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ERRORS AND OMISSIONS

The contents of the CMDC Media Digest were written by member agencies of the Canadian Media Directors' Council, with a few expert exceptions. While we do our best to provide the most accurate and up-to-date information, occasionally errors or omissions can occur. Readers who wish to point out any errors or omissions are urged not to contact *Strategy* magazine but to email Janet Callaghan, president of the CMDC, at jsc@janetcallaghan.com. Thank you.

CANADIAN MEDIA DIRECTORS' COUNCIL

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REGULATORY NEWS + INFORMATION



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The role of media has gone through a massive transformation, balancing all that technology enables with a new multitude of creative possibilities and new ways to reach people with precision. It seems media trends are being updated every few weeks. And with that, we worry about overestimating the present and underestimating the future. Here are four things that (happily) keep us up at night:



Humanizing Data

When we talk about data, the conversation easily starts to migrate to the complexity of how, the attribution of, and the task of interpreting. All of that is important, but in a world where data is really just a reflection of human behaviour, we need to ensure we don't lose sight of its humanity.

The full embracement and actioning of data by media vendors and media agencies will see the true power of it unleashed when we humanize the monolithic "target" or "consumer" (words that should be banned by the media community) and recognize that we need to reach people.

"People" are different than a "target" since they are composed of needs, attitudes and behaviours that are valuable in understanding the "whys" behind the "whats" when it comes to the vast media and content landscapes. We're less interested that a person spends X number of



hours per week online. We're more interested in the idea of that person leveraging content for social status since that's what may be truly reflected in the data representing that person's content choices.

Data provides such insight because the content choices people make are a direct reflection of them as people. Since data is behaviour, it means media vendors and media agencies will need to become experts in human behaviour as much as they are experts in media. This is already impacting the type of people the industry attracts and hires and the roles they have. Who will be the first to hire a behavioural economist or data-centric cultural anthropologist?

True Media Innovation

What we mean here is not what is often mistakenly recognized and even rewarded as media innovation, such as a piece of brand agency-created content merely "amplified" by the media agency. Rather, a trend we're encouraged by is that more media vendors are more open to true media innovation by embracing the full creative

potential of their platforms or content and defying their traditional and often archaic conventions. If Cannes Lions 2016 is any indication, we're seeing more of it and believe more will come. For example, see the "End The Silence" work by Tienda La Sirena or the "Second Scoreboard" work by The Ministry of Women's Affairs in Costa Rica. In each of these cases, traditional content was altered to create powerful media experiences transcending regular advertising. As media platforms continue to scramble for share of spend, those willing to provide innovative breakthrough media-centric solutions will be winners.

Influencer Maturation

No question that there's power in influencer marketing. What is in question is how much power? Ask most any seller of influencers what the direct and real influence their influencers have on a brand and they inevitably respond with numbers reflecting followers, clicks, engagements, shares and the like. But they cannot answer the question about real key performance indicators' impact on the brand.

Influencer marketing is set to mature and will do so, in part, through research to quantify its direct value to brands. This will be led by challenger media agencies seeking validation of investment and impact. Recent research suggests that influencers with smaller numbers of followers have more real influence than those with large followings. So, small may be the new big. And who are the "alpha-influencers" influencing the influencers? Where influence exists and how it truly impacts a brand is a new and exciting road to navigate.

Content Discontent

People are drawn to what interests them, and that is (and will always be) content versus platforms or methods of distribution. But in a world that seems to be in a permanent state of distraction is a realization that brands need to be more frequent, diverse and perpetual with content, versus simply creating a single piece of content to endure.

An example of this is the programmatic creative campaign for Axe in Brazil where 100,000 pieces of content were created with data and customization at its heart. Is it even possible for that content to wear out? An increase in such campaigns will be the norm. It may not be 100,000 pieces, but we see more brands experimenting with programmatic creative and thinking about the modularity of the content elements as a way of being and staying interesting to people. ●

Contributed by**Greg Ramsay, VP Audience and Measurement Solutions, Starcom MediaVest Group**

The tidal wave of change that has swept across the media landscape continues to reshape the options for how marketers can reach consumers. Traditional media continue to be buffeted by the shift to digital, but the transition has also created new opportunities for some media to become more relevant and effective than ever. At the same time, digital media continue to adapt to meet new consumer needs and better leverage the promise of a world of abundant data.

For clients, however, this never-ending upheaval has reinforced the need for precision targeting, accountability and a laser focus on maximizing the return on their marketing investment.

DIGITAL TAKES A NEW TURN**Consumer choice takes a bite out of TV**

After fighting a desperate rear-guard action to fend off the disruption of its business model, 2016 likely marks the turning point in how the television industry markets to Canadian consumers. Even as Netflix established a foothold in almost half of anglophone households, cable companies were able to defend their subscriber bases by leveraging programming bundles and tiers that tied high-demand offerings like sports to more vulnerable stations.

While the CRTC's drive to create a "skinny basic" alternative for potential cord-cutters has fizzled, December marks the deadline for BDUs to offer true à la carte pricing on a station-by-station basis. Although pricing strategies will doubtless limit the financial savings for most consumers, a culling of the specialty-TV herd seems inevitable.

Broadcasting steps into programmatic

Small-scale tests using return path data and addressable VOD have been taking place over the past year, but most have either lacked scale or have been minor improvements on the current buying model. That looks set to change in the next few years. This year's upfront season unleashed a wave of announcements from television broadcasters promising cross-screen programmatic marketplaces in conjunction with partners like Videology, AOL and VisibleWorld.

Most of the current plans seem to be focused on operational efficiency rather than a complete reengineering of the television marketplace, but they will lay the foundations for a truly addressable future.

OOH becomes personal

The oldest advertising medium is suddenly hot again. Zenith forecasts that out-of-home advertising dollars will increase 7% in 2016, while other traditional media are flat or declining. Much of the increase is based on OOH's enthusiastic embrace of all things digital, including video, beacons and other mobile-based technologies.

For an industry that was based on traffic counts, this pivot to data has been transformational. The medium that epitomized static, mass-reach communications suddenly has the opportunity to deliver dynamic, personalized content at the moment when it's most relevant.

DIGITAL TAKES A NEW TURN**The shift to video continues**

The Internet is increasingly becoming a visual medium, with Cisco forecasting video will account for 85% of all North American Internet traffic by 2020. Facebook recognized this trend several years ago and has since become the #2 video platform in Canada. Indeed, the head of its European operations has gone as far as suggesting that in five years Facebook "will be probably all video" because it "conveys so much more information in a much quicker period."

Mobile data expands beyond the handset

Zenith estimates that mobile will account for 37% of all Canadian Internet ad spending this year, up from just 3% five years ago. The attraction of mobile advertising to marketers is obvious. It's an intensely personal device that identifies who you are, where you are (and where you have been), and what you're interested in.

Savvy marketers are already leveraging these capabilities within the mobile space, recognizing that a search for pizza when a consumer is walking down the street is likely a search for a nearby restaurant, while a search from their living room means they're looking for delivery.

The greater opportunity lies in linking this wealth of data across devices. Right now, a handful of industry heavyweights like Google and Facebook have access to cross-device identifiers that marketers can leverage within their own defined advertising platforms. Other players are working to build algorithms that identify users based on IP address, browsing activity and device type, and would leverage this data on tablets, PCs and even smart TVs or streaming audio devices.

Immersive augmented reality is back

Early versions of augmented reality hardware like Google Glass were interesting experiments that only gained traction among tech enthusiasts due to their high cost and the lack of “killer apps.” The increasing power of smartphones offered a low-cost, widely accessible solution that Snapchat successfully exploited with its popular filters.

Now Pokémon Go has redefined the category, smashing app download records and overloading its servers during the Canadian launch. Advertisers are scrambling to understand how they can exploit the platform safely, particularly after early reports of users lured into questionable situations. With an installed base of over 100 million devices, though, AR finally has the scale to catch marketers' attention.

MARKETERS PUSH FOR ACCOUNTABILITY

Building audiences, not targeting demos

After decades of trading on age and sex demographics, the advertising industry has been slow to embrace the shift

to programmatic media and the one-to-one targeting it offers. This reluctance was driven partially by a shortage of digital talent. However, there was also a sense that programmatic inventory was inherently riskier than traditional reserve buys.

Programmatic found its greatest support among performance marketers who valued the ability to precision-target consumers and adjust tactics to maximize conversion. Now, as the average tenure of an American CMO drops to 44 months, the pressure on marketers to prove their ability to drive ROI has increased dramatically. Traditional brand marketers are wading into programmatic marketplaces and eMarketer estimates that 58% of digital display ads will be bought programmatically in 2016.

Valuing programmatic impressions

A recent ComScore study found that less than half of all U.S. digital ad impressions were actually viewed by humans—45% were not viewable and 7% were served to non-human traffic. These impressions were served and paid for, but have absolutely no chance of driving business results.

While performance advertisers can optimize their buys based on conversions, brand marketers require a greater assurance their messages are actually being seen by consumers. ComScore's vCE and Nielsen's DAR were important first steps in this direction, but technologies like ComScore's Bid Ratings are the key to ensuring we can accurately assess the value of programmatic inventory.

Overcoming ad blockers

A 2016 IAB Canada study found that 17% of Canadians

use ad blocking software on their PCs, preventing tens of billions of ads from being served. Among the hard-to-reach male 18–34 demographic, penetration of ad blockers rose to 28%. While advertisers are never charged for these lost impressions, they represent a threat to the viability of ad-supported websites and create a segment of the population that cannot be reached online.

The positive news from the study was that the vast majority of Canadians accept the tradeoff of advertising for free, high-quality content. Users of ad blockers reported they would be less likely to use the software if there were fewer ads on webpages that didn't interfere with the user experience, underscoring the need for ads that are less intrusive and don't interfere with browsing.

A move towards holistic modeling

Marketing mix models (MMMs) have been the standard for measuring the ROI of advertising campaigns for over two decades. Unfortunately, these models are time-consuming to build and are typically based on multiple years of historical data, limiting their ability to respond to changes in a fast-evolving media landscape.

As a result, many marketers have also implemented multi-touch attribution models (MTA) that track the consumer's path to action in the digital space. MTA allows for much more agile optimization, but because offline data isn't currently incorporated, they offer an incomplete view of effectiveness.

In the short term, many marketers are juggling both solutions. But as traditional media continue to evolve into digital, addressable formats, the opportunity exists to bring together both online and traditional media in a single holistic view of campaign effectiveness. ●

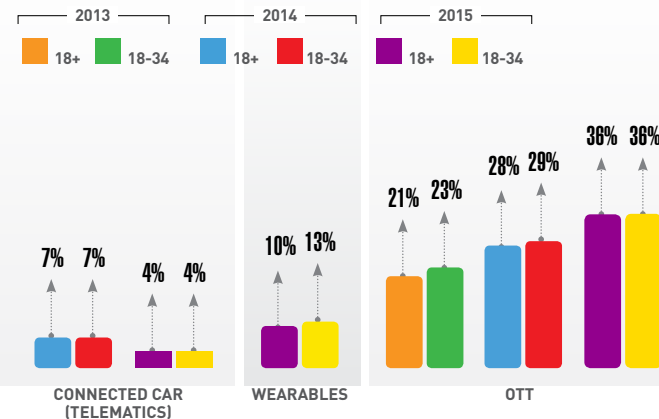
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Commissioned by IAB Canada

WHAT IS CMUST?

Since its inception in 2004, IAB Canada's Canadian Media Usage Trends Study (CMUST) is the only Canadian study crossing all major media and combining each channel's research audience currency of record. The study documents consumers' changing media consumption across all media as digital technologies impact the lives of Canadians. The study focuses on how new devices and new types of content are triggering ways consumers devote ever-growing time counts with the Internet. This includes simultaneous usage of TV and the Internet, car connectivity, new multi-platform data from ComScore, time spent with Internet video commercials and the impact of ad blocking.

2015 Penetration by Device



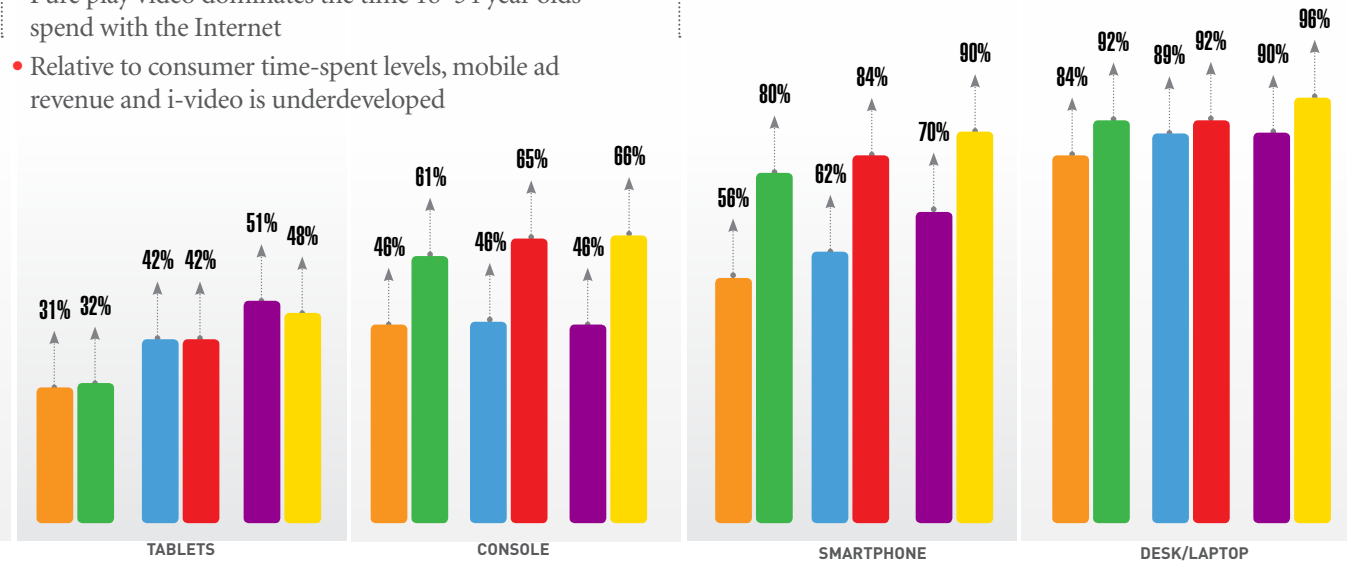
C-MUST HIGHLIGHTS

- Internet-accessing devices are proliferating
- Car connectivity and wearables are now in the Internet "pipeline"
- Offline media time is holding, Internet time is growing
- Mobile video is still effectively unmeasured
- 40% of actual Internet time is still buried
- TV/Internet is intersecting and a battle for video attention is being waged
- Ad blocking has impacted display ad impressions over the last two years
- Pure play video dominates the time 18–34 year olds spend with the Internet
- Relative to consumer time-spent levels, mobile ad revenue and i-video is underdeveloped



DEVICES

The chart below demonstrates how devices capable of accessing the Internet have grown over the last three years. Both adult 18+ and adult 18–34 per cent penetration levels are shown. There is a wide range of consumer uptake of these devices, ranging from desktop/laptop at 90%, to the relatively new car connectivity device at 4% penetration.

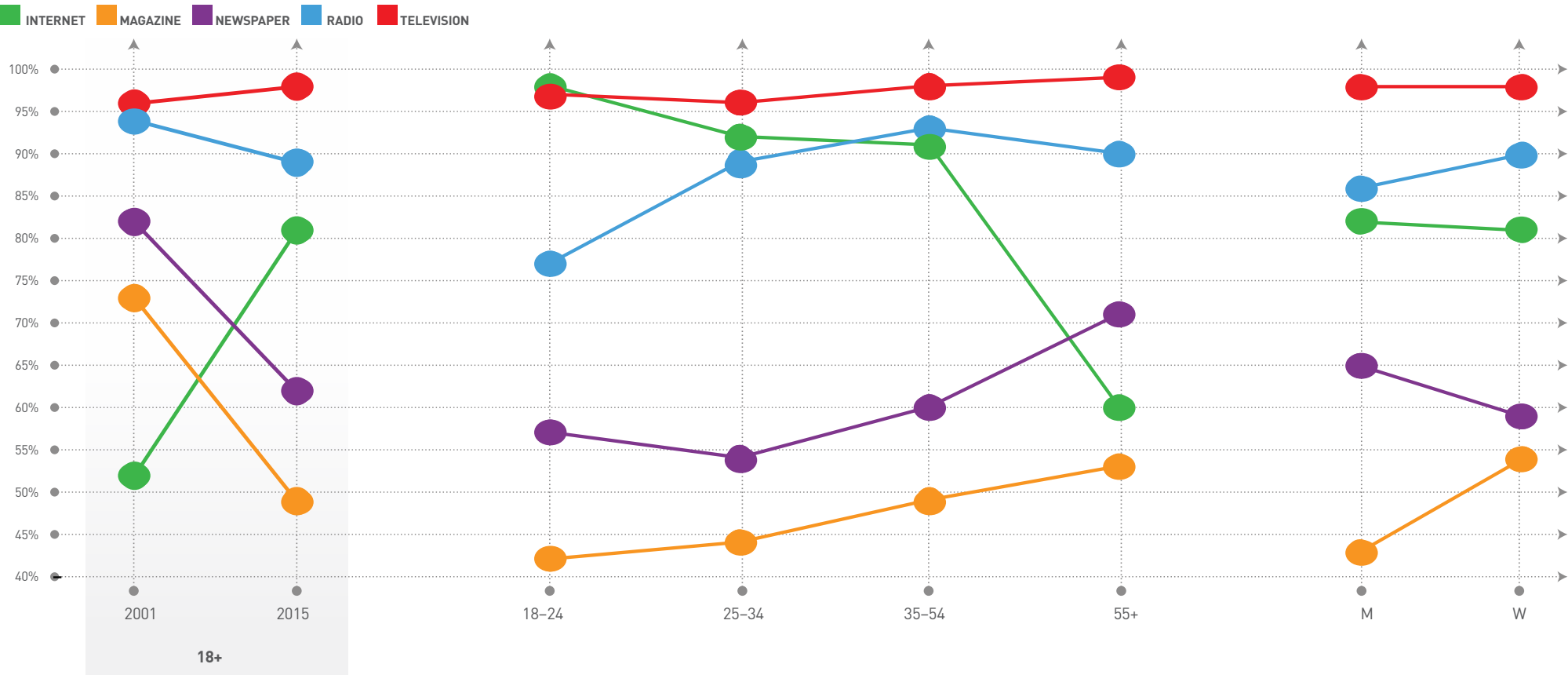


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REACH

Offline media have experienced declines in its ability to generate weekly reach over the last 14 years. TV is the exception, exhibiting an increase in weekly reach (due to changes to PPM survey methodology). Magazines experienced a particularly significant drop in reach due to the demise of the TV Guide segment of publishing. The Internet, on the other hand, is now utilized by just over 80% of adults in total Canada weekly, up dramatically from a 52% weekly reach level in 2001.

Weekly Reach by Age Group



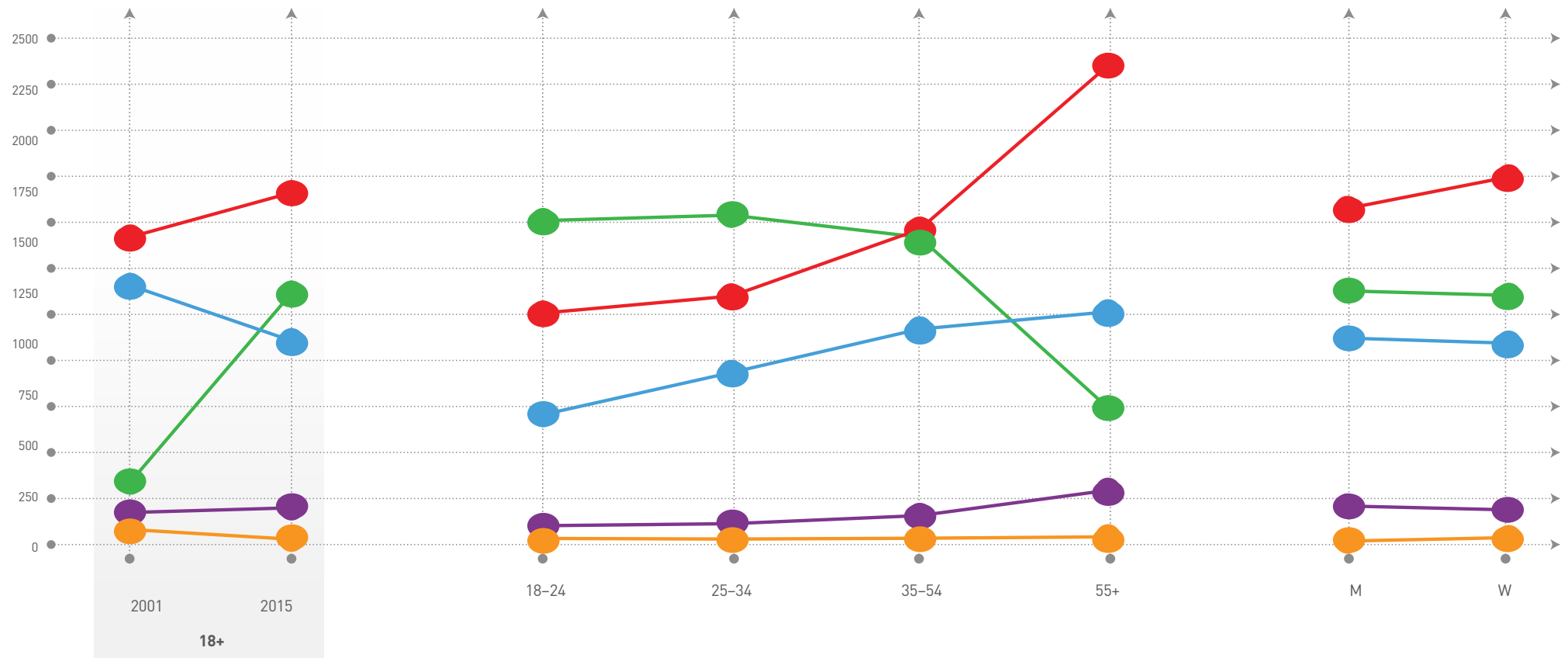
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TIME

Newspaper and TV have both experienced increases in weekly time counts (minutes per capita) over the last 14 years. The increase for TV comes as a result of changes in measurement technology. The newspaper medium has added new, youth-skewed, Metro dailies over the 2001–2015 period. Radio's decline in weekly minutes is due in large part to lower 18–24 time counts as this segment continues to search out and discover alternate sources of music. The Internet has outpaced the offline media in terms of growth in minutes per week and it's the only medium that can boast an overall youth-skewed profile.

Minutes Per Week Per Capita

■ INTERNET ■ MAGAZINE ■ NEWSPAPER ■ RADIO ■ TELEVISION



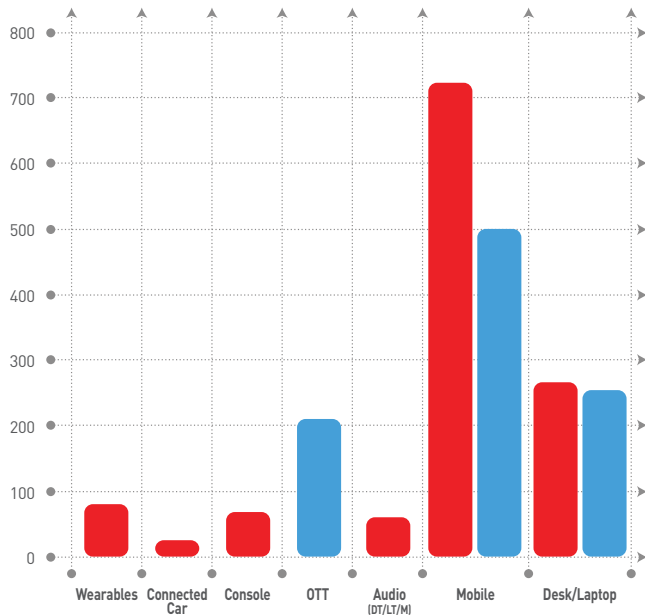
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UNEARTHED TIME

ComScore does not measure Internet consumption of many devices, namely wearables, car connectivity, game consoles, OTT, audio and, until recently, mobile video. In 2015, publishers began to tag their mobile video content, but as of fall 2015, ComScore's mobile video time counts are still sparse. This chart provides estimates of minutes per capita per week for adults 18+ to determine the Internet's "unearthed time." The unearthed time count is 2,186 minutes per week compared to 1,244 minutes counted by ComScore. More than 40% of the Internet's total consumed time is estimated to be "buried" or still unmeasured.

Minutes Per Week Per Capita

■ NON-VIDEO ■ VIDEO

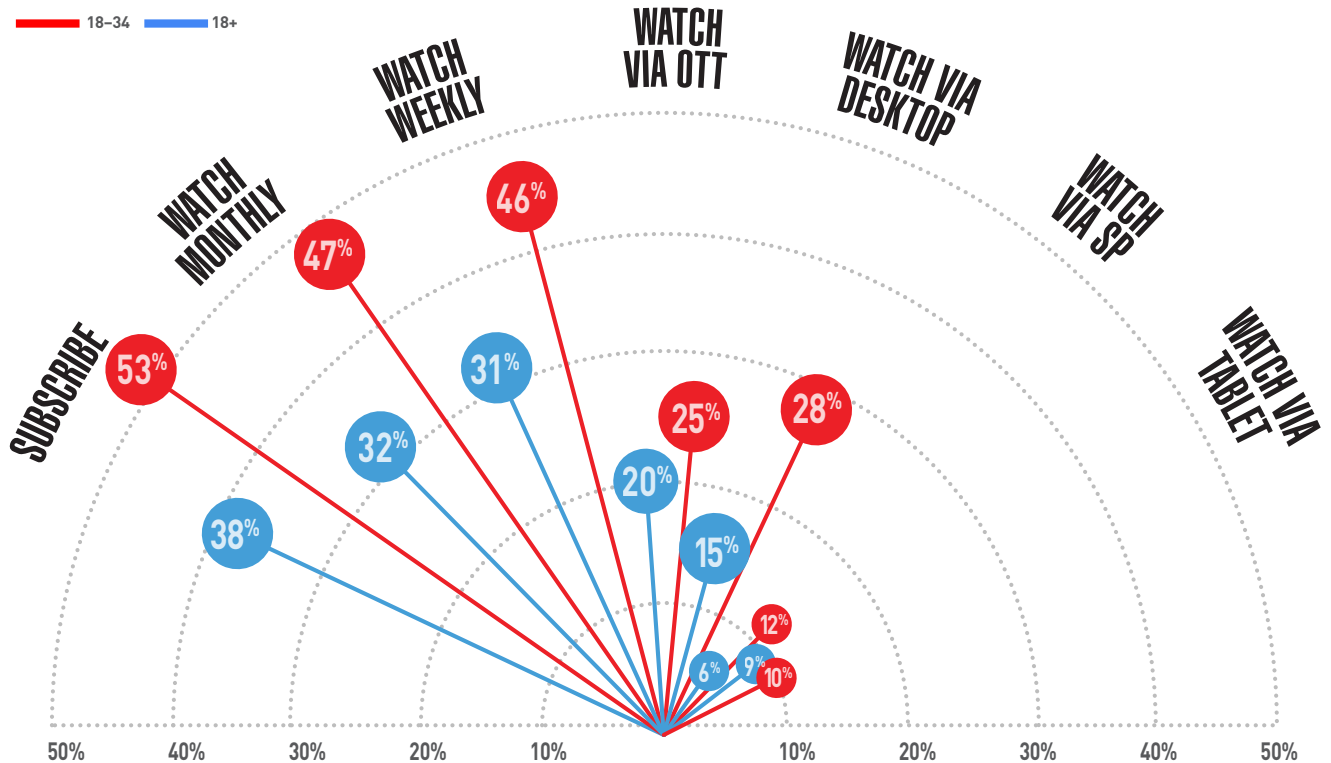


TV/INTERNET INTERSECTION

Each new year finds the TV and Internet mediums moving closer together, a phenomena referred to as "connected TV." Here are five new developments in the space where TV and Internet intersect.

NETFLIX

Probably the best example of the intersection of Internet and TV, Netflix now boasts subscription penetration of more than 50% of adults 18–34 in Canada, according to the spring 2015 MTM survey. Netflix is now clearly positioned within the mainstream video entertainment marketplace.

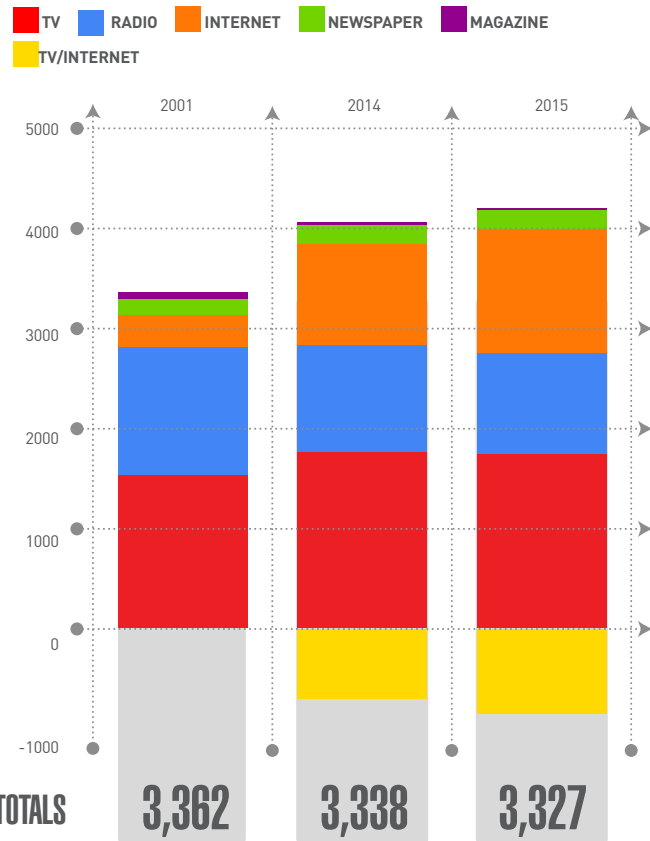


Source: MTM Survey, Spring 2015

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SIMULMEDIA

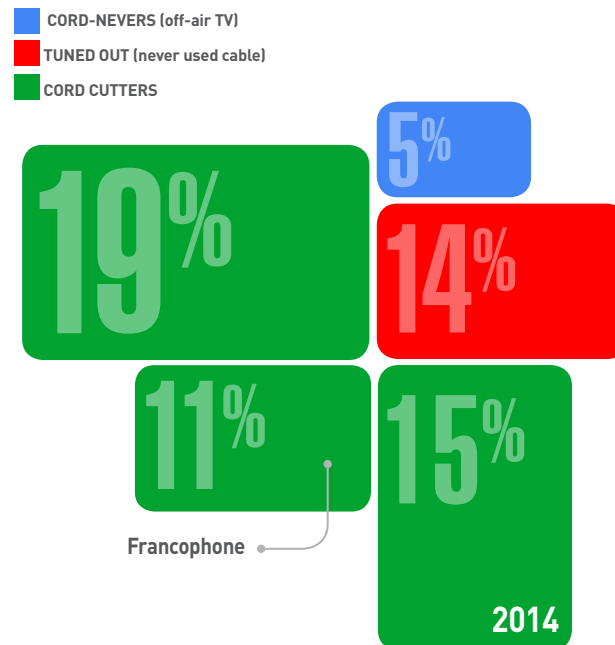
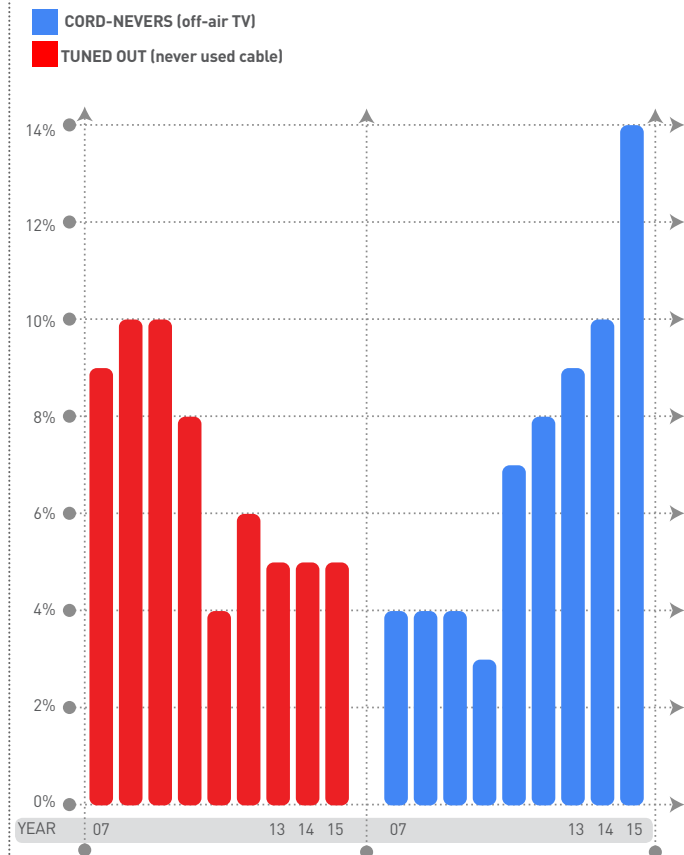
The 2015 MTM survey found that 51% of TV viewing occurs while accessing the Internet. Once these duplicated, “simulmedia” minutes are removed from total media time, we find little change in the resulting unduplicated media time consumption year over year.



CORD CUTTING

Cord cutters are individuals who either watch TV off air (in decline) or who never watch live TV at all (growing). The sum of these two groups stands at 19%, up from 14% in 2014. French Canada's cord cutting proportion is smaller because pick and pay cable options exist in Quebec.

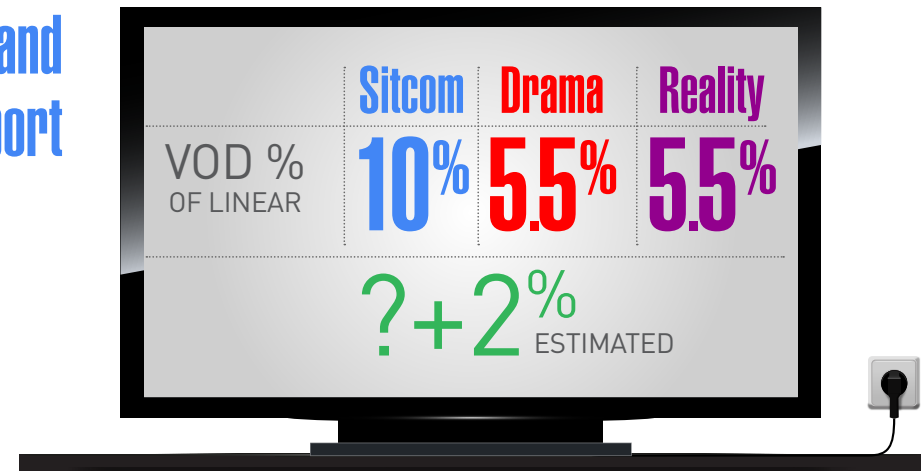
Cord Cutting

Cord Cutting
Portions of Canadians 18+

VIDEO ON DEMAND

In October 2015, Numeris published the results of a measurement test that ran between January and June 2015. Three English-language broadcasters encoded their video-on-demand content in a way that allowed for a separate PPM audience track to take place. These incremental “on demand” audiences were generated from set-top box VOD and also included audiences who tuned to streamed TV content on broadcaster websites. These VOD program audience results were segmented by genres. The extra VOD tuning accounted for between 5.5% and 10% of the linear or live TV audience levels. We have estimated that only 25% of total TV time is impacted by VOD, resulting in a time count “lift” of 2% for the TV medium.

Video On Demand Measurement Report



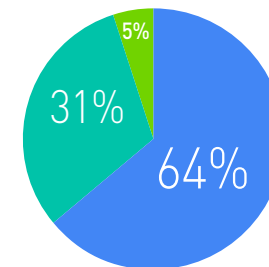
Source: NUMERIS October 2015

The minute-per-week time counts used in this CMUST report include time consumers spend with commercials (TV, radio and Internet video) and ads (newspaper and magazine). The industry does not measure time spent with ads, but a time spent with commercials can be determined. TV and radio channels that are commercial enterprises dedicate fixed amounts of time per hour to the airing of commercials, and in this way broadcast time counts can be estimated. ComScore measures, through its Ad Metrix service, video commercial time exposures. This chart adds up these commercial minutes, shows a time composition percentage and compares the time composition to the distribution of ad revenue for these three media forms. The percentages line up, suggesting that revenue per minute of tuning is comparable between these three media forms.

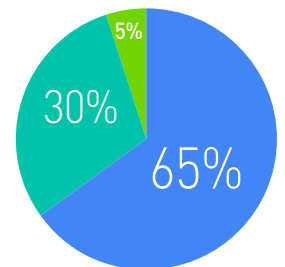
Time & Money Spent with Commercials

TELEVISION RADIO INTERNET

Commercial Time

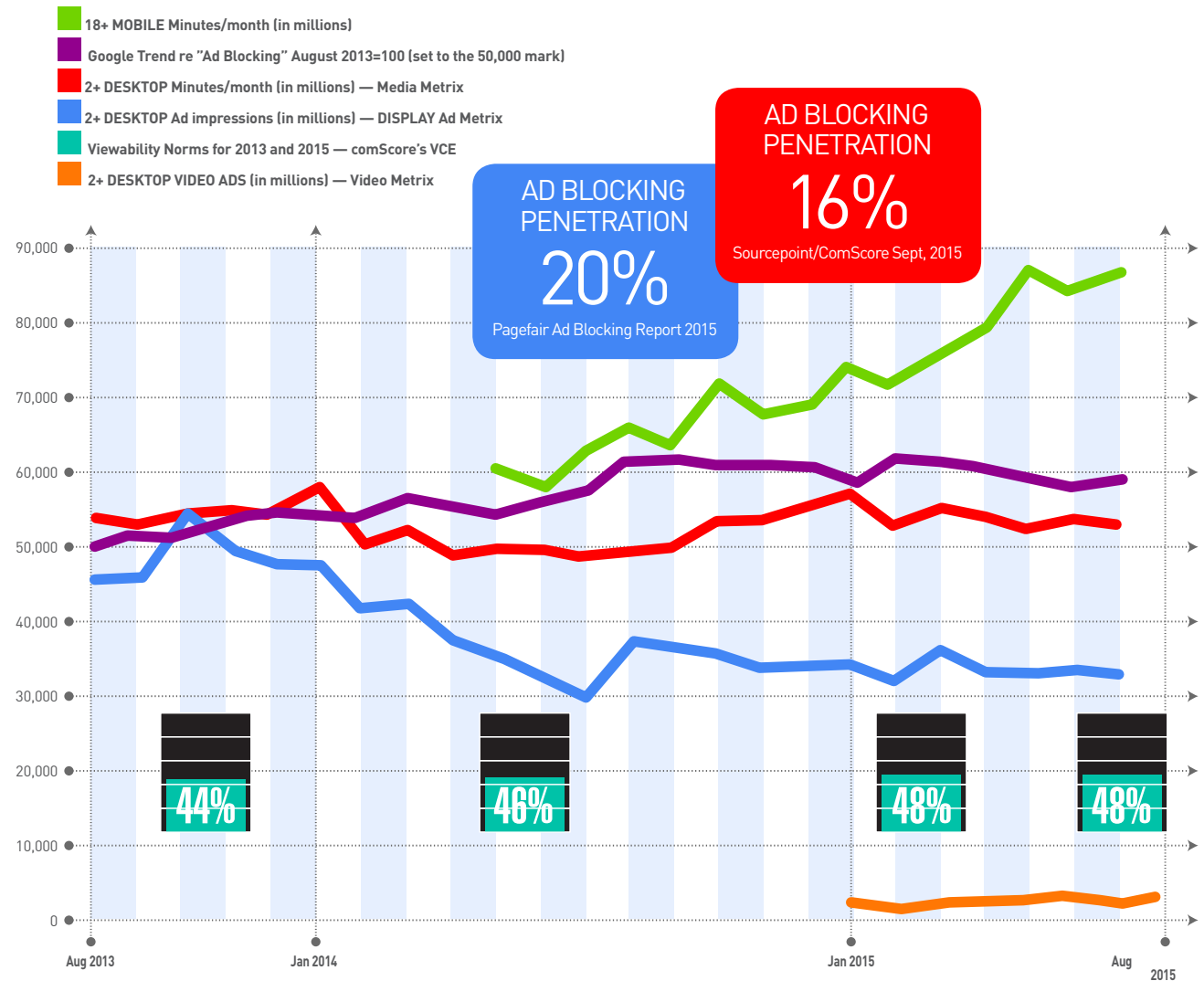


Commercial Revenue



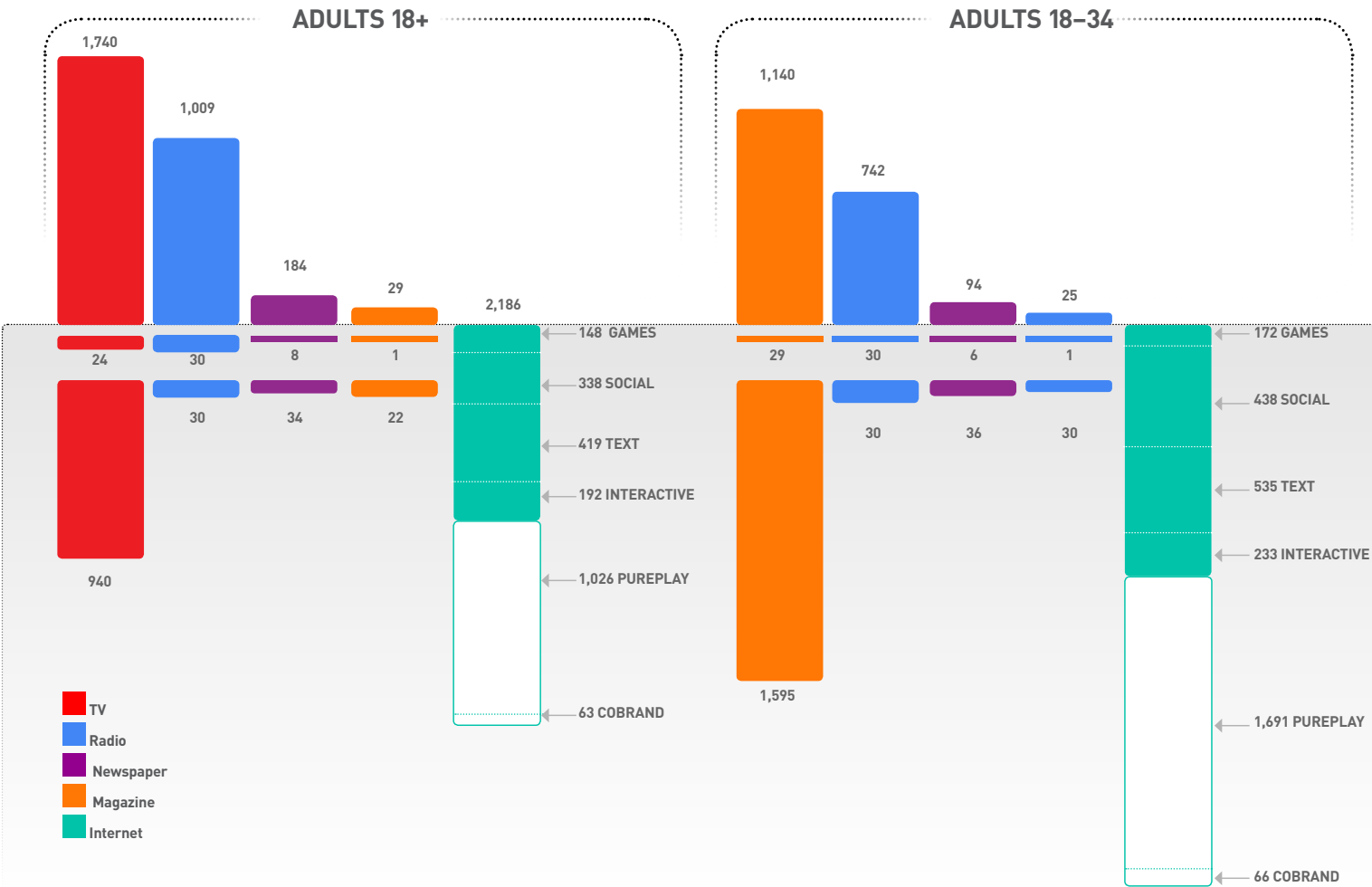
AD BLOCKING

The blue trend line tracks the number of display ad impressions that occurred on desktop/laptop between August 2013 and August 2015, a 30% downward trend. Why? Desktop/laptop time is steady (the red line), even as mobile time is on the upswing (the green line). Video ads, while growing, are not a significant explanation (the orange line) and viewability norms have not altered enough to have caused the downward thrust of the display ad impressions. That leaves ad blocking as the most likely reason for the ad impression decline we've seen over the last two years. A Pagefair study of ad blocking in Canada from 2015 puts ad blocking penetration at 20% and a 2015 Sourcepoint/ComScore report places the penetration level at 16%, suggesting that ad blocking is responsible for less than 20% of the display impression declines since 2013.



INTERNET CONTENT

This chart quantifies the amount of time (minutes per week per capita) adults 18+ and adults 18–34 spend with different genres of Internet content. Legacy media minutes are scaled above the line and Internet minutes are scaled below the line. Cobranded refers to Internet time spent with online extensions to legacy media channels (TheStar.ca, for example) and pureplay refers to time spent with Internet content that is off-line media-like but available only online (Huffington Post, for example). Of note is the very large degree of time spent with video (the red boxes), be it on-line or off-line.



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REVENUE DEVELOPMENT

Adults in Canada spend 23% and 17% of their total media time with mobile Internet and Internet video respectively. Marketers, on the other hand, spend only 8% and 2% of total ad budgets against these two media forms. Mobile and i-video suffer from a high degree of revenue underdevelopment today. A listing of “headwinds” and “tailwinds” relating to this dynamic suggests some of the forces at work that might explain this underdevelopment.

In the case of i-video, target rating points (TRPs), which implies the need for a weight threshold as is the case with TV, has been met with resistance. On the other hand, the TRP provides a positive measurement commonality between TV and i-video that can assist in merging the two channels into one weight generator. ●

	Time (minutes per capita Ad 18+)		Revenue (millions)	
Mobile	1,222	23%	\$903	8%
iVideo	908	17%	\$266	2%
Total	5,232	100	\$10,986	100%

Headwinds Tailwinds

Mobile

Lack of mobile website design	Under-utilized (less cluttered)
Unresponsive site design	Reach Extension
Small restrictive units	Rapid growth in time spent
Audio Disable	More focused messaging
Ad Blocking (Apple 6.0)	Evidence of highly responsive

i-Video

TRP's	TRP's
Undesirable content	Less clutter
TV VOD, IPTV	Youth supplement
Ad Aversion	Programmatic
Plan or buy decision?	Multichannel Planners

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The media industry continues to evolve at an ever-increasing pace. Advertisers, with the hopes of reaching audiences more efficiently, continue to shift spend towards online platforms. Media suppliers adapted their offering to compete fiercely in an industry whose growth is directly linked to our sluggish economy.

The collapse of oil prices, starting at the end of 2014, is the biggest factor affecting the Canadian economy in 2016. Prices fell from a peak \$115 a barrel in June 2014 to under \$35 at the end of February 2016. This was due to both over supply and a collapse in demand thanks to faltering European and Asian economies. (Source: World Economic Forum)

This is great news when you fill up your tank, but the falling oil prices put Canada into a minor recession in the second half of 2014. Although we have seen weak signs of recovery by mid 2016, we remain uncertain regarding the remainder of 2016. Oil also had a major impact on the Canadian dollar, causing it to fall from around 95 cents

U.S. in 2014 to around 75 cents U.S. in the second half of 2016. (Source: Glushkin Sheff and Associates)

The low dollar impacts all Canadians as they pay more for imported goods. The average Canadian will pay \$345 more on food (on average) than they did last year, according to The Food Institute of the University of Guelph. However, it's not all bad news, as some sectors of the economy benefit from the low dollar, such as manufacturing and tourism. This is reflected regionally in the Canadian Consumer Confidence Index and consumer spending. Both of these indicators continue to make ground nationally, driven by provinces with tourism and manufacturing-based economies, such as Ontario, British Columbia and Quebec.

Tied closely to the growth of the Canadian economy, advertising spend has maintained a predicted low single-digit year-on-year growth of +3.0% in 2016 and 2017 as the economy recovers, slightly higher than the actual spend recorded on 2015 of +2.5%, according to the Carat Ad Spend Report. The report notes that the moderate growth in the Canadian market continues to be affected by the slow economy, with the fall in oil prices and limited exports.

Although the size of the advertising-spend pie is not growing substantially, some media are making substantial gains at the expense of others.



Advertisers are increasing their investment in the digital ad space. This increased investment is driven by a 79% year-over-year growth in mobile use due to a wider adoption of tablets and smartphones as more mobile content becomes available online. (Source: IAB Canada)

Out of home (OOH) has also experienced steady growth in revenue over the past five years. This growth can be attributed to audience erosion in other media, a mobile and active population, and significant investments in digital OOH. (Source: OMAC)

Broadcast television investments remained relatively stable, falling just 0.6% in 2015 versus 2014. This is due to a shift in consumer viewing habits toward other broadcasting platforms such as desktop and mobile. (Source: CRTC)

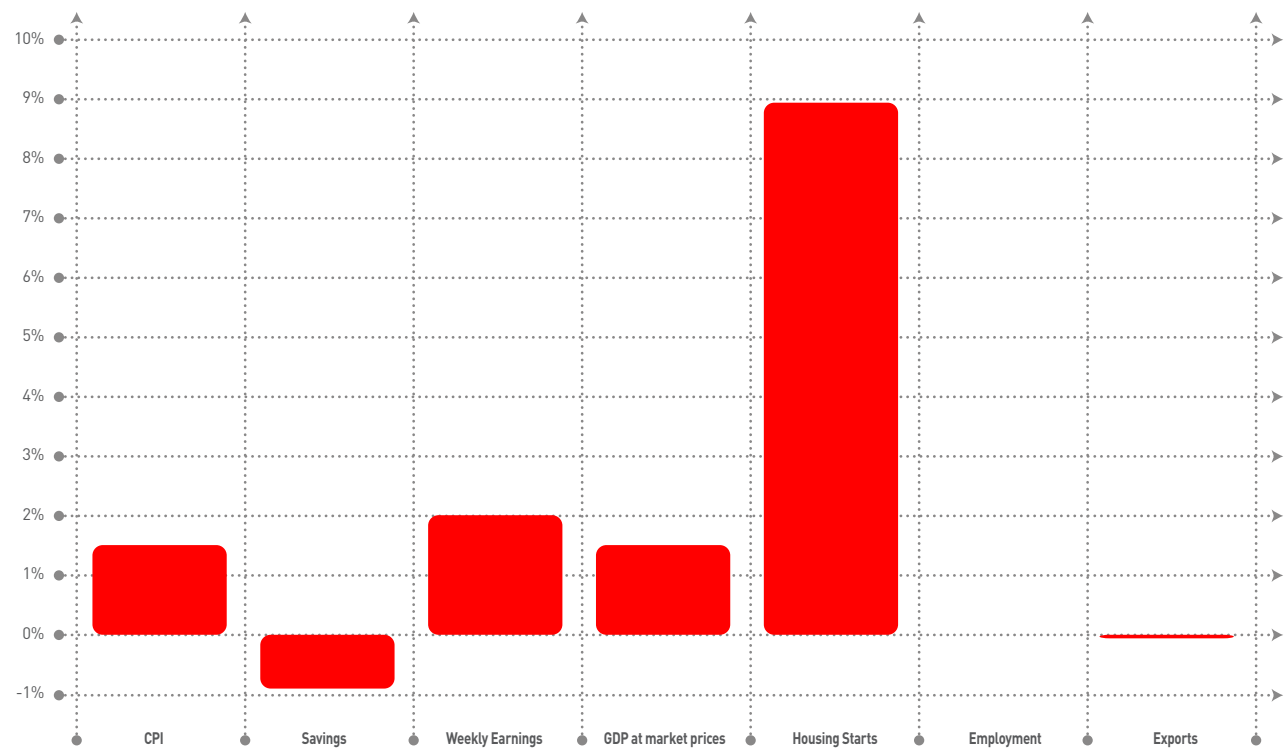
Radio advertising revenue has remained remarkably stable over the last five years with total revenue down 0.8% YOY. Investment is shifting from local radio, which has seen a steady decline in investment, to national radio, which has grown consistently since 2009. (Source: CRTC) Radio stations have also been adapting to stay relevant with millennials through online streaming and mobile apps such as iheartradio and Adwave.

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Newspaper ad revenue continues to decline, despite the insatiable appetite for content and the high value that newspaper journalism contributes to all channels. Daily newspapers saw a steep decline of 15.2% in advertising volume in 2015, partly due to a decrease from 104 to 99 daily newspapers and losing market share to mobile and digital news platforms. Community newspapers also saw a substantial decrease in revenue of 9.1% despite a 1.9% increase in circulation in 2014. (Source: Newspapers Canada) This erosion will continue until the right newspaper business model evolves to pay for development of premium content and the total eyeballs it delivers.

All media must continuously evolve to stay relevant and reach the right audiences at a time when technological advancements are growing at an exponential rate. The companies that will succeed in this environment are the ones that are always looking ahead to leverage new technology to reach the right audiences more efficiently at the right time and place. ●

Key Economic Indicators (2015)



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Net Advertising Volume

Canada - Millions of Dollars (CDN Currency)

Medium		2011	2012	2013	2014	2015
REPORTED ACTUALS						
Television	Total	3,552	3,467	3,387	3,361	3,342
	Conventional	2,302	2,189	2072	2099	2093
	Specialty	1,233	1,263	1297	1244	1235
	Infomercial	17	15	17	18	14
	Share of Reported Media	29.5%	27.7%	27.8%	27.8%	26.6%
Online Television	Total	107	115	123	142	169
	(incl. in Internet) Share of Reported Media	0.9%	0.9%	1.0%	1.2%	1.3%
All Television	Grand Total	3,658	3,582	3,510	3,503	3,511
Daily Newspaper	Total	1,971	2,019	1,679	1,392	1,181
	National	709	804	664	529	401
	Local	709	719	592	529	506
	Classified	335	289	249	175	119
	Inserts	217	207	173	159	155
	Share of Reported Media	16.4%	16.1%	13.8%	11.5%	9.4%
Community Newspaper	Total	1,167	1,253	996	925	841
	National	131	123	107	120	101
	Local	705	798	602	535	484
	Classified	113	106	83	72	68
	Inserts	219	226	204	198	188
	Share of Reported Media	9.7%	10.0%	8.2%	7.7%	6.7%
Online Newspaper¹	Total	289	277	262	273	283
	(incl. in Internet) Share of Reported Media	2.4%	2.2%	2.2%	2.3%	2.3%
All Newspaper	Grand Total	3,427	3,549	2,936	2,590	2,305
(Total of Daily, Community, Internet)						
Radio	Total	1,576	1,585	1,600	1,589	1,576
	National	442	454	477	497	509
	Local	1,134	1,131	1,123	1,091	1067
	Share of Reported Media	13.1%	12.7%	13.1%	13.1%	12.6%
All Internet (Total of Desktop & Mobile)	Total	2,674	3,085	3,418	3,793	4,604
	Search*	1,081	1,586	1802	2052	2512
	Display*	840	974	1091	1274	1554
	Classifieds/Directories*	576	249	289	171	162
	Email*	13	12	18	19	13
	Video*	73	92	208	266	358
	Video Gaming*	10	13	11	11	5
	Share of Reported Media	22.2%	24.7%	28.0%	31.4%	36.7%

Medium		2011	2012	2013	2014	2015
Desktop	Total	2,593	2,925	2,991	2,890	2,984
(incl. in Internet)	Share of Reported Media	21.5%	23.4%	24.5%	23.9%	23.8%
Mobile	Total	81	160	427	903	1,620
(incl. in Internet)	Share of Reported Media	0.7%	1.3%	3.5%	7.5%	12.9%
General Magazines	Total	593	573	558	472	412
	Share of Reported Media	4.9%	4.6%	4.6%	3.9%	3.3%
Out-of-Home	Total	516	520	548	559	586
	Share of Reported Media	4.3%	4.2%	4.5%	4.6%	4.7%
TOTAL ACTUALS		12,049	12,503	12,185	12,091	12,543
UNREPORTED ESTIMATES						
Catalogue/Direct Mail	Total	1,243	1,257	1,239	1,181	1,196
	Share of Reported Media	61.1%	60.8%	68.6%	73.1%	77.7%
Yellow Pages	Total	791	811	566	435	344
	Share of Reported Media	38.9%	39.2%	31.4%	26.9%	22.3%
TOTAL ESTIMATES		2,034	2,067	1,805	1,616	1,540
TOTAL ESTIMATED ADVERTISING		14,083	14,570	13,990	13,707	14,082
Total Television		3,552	3,467	3,387	3,361	3,342
Total Advertising		14,083	14,570	13,990	13,707	14,082
TV Share of Total Advertising [%]		25.2%	23.8%	24.2%	24.5%	23.7%
Population [Millions]		34	35	35	36	36
Per Capita Television Advertising		103	99	96	95	93
Per Capita Total Advertising		408	415	397	386	392

Sources: Television: CRT; Daily, Community & Online Newspaper: Newspapers Canada; 1 - Online Newspaper revenue is not included in the totals for Reported Media or Total Estimated Advertising to avoid double counting the newspaper revenue reported by the IAB in the Internet section; Radio: CRT; General Magazine: Magazines Canada; Outdoor: EMarketer; Direct Mail: Canada Post Annual Report 2015; Internet: IAB Canada, Yellow Pages: Estimate based on last report by YPG annual statement 2015; Population: Statistics Canada Mid-Year Population by Year.

Note: Some figures may differ from previous charts due to updating.

CANADIAN MEDIA DIRECTORS' COUNCIL

Net Advertising Volume

(Canadian \$ of reported media actuals)

Share of Reported Media Actuals	2007	2008	2009	2010	2011	2012	2013	2014	2015
Television	\$3,299	\$3,393	\$3,104	\$3,391	\$3,552	\$3,467	\$3,387	\$3,361	\$3,342
Daily Newspaper	\$2,572	\$2,489	\$2,030	\$2,102	\$1,971	\$2,019	\$1,679	\$1,392	\$1,181
Community Newspaper	\$1,154	\$1,211	\$1,186	\$1,143	\$1,167	\$1,253	\$996	\$925	\$841
Radio	\$1,468	\$1,558	\$1,470	\$1,517	\$1,576	\$1,585	\$1,600	\$1,589	\$1,576
Desktop	\$1,241	\$1,602	\$1,822	\$2,232	\$2,593	\$2,925	\$2,991	\$2,890	\$2,984
Mobile	\$2	\$7	\$23	\$47	\$81	\$160	\$427	\$903	\$1,620
General Magazines	\$718	\$692	\$590	\$606	\$593	\$573	\$558	\$472	\$412
Out of Home	\$422	\$454	\$469	\$512	\$516	\$520	\$548	\$559	\$586
Total Reported	\$10,875	\$11,405	\$10,694	\$11,551	\$12,049	\$12,503	\$12,185	\$12,091	\$12,543

Net Advertising Volume

(Canadian share of reported media actuals)

Share of Reported Media Actuals	2007	2008	2009	2010	2011	2012	2013	2014	2015
Television	30.3%	29.8%	29.0%	29.4%	29.5%	27.7%	27.8%	27.8%	26.6%
Daily Newspaper	23.6%	21.8%	19.0%	18.2%	16.4%	16.1%	13.8%	11.5%	9.4%
Community Newspaper	10.6%	10.6%	11.1%	9.9%	9.7%	10.0%	8.2%	7.7%	6.7%
Radio	13.5%	13.7%	13.7%	13.1%	13.1%	12.7%	13.1%	13.1%	12.6%
Desktop	11.4%	14.0%	17.0%	19.3%	21.5%	23.4%	24.5%	23.9%	23.8%
Mobile	0.0%	0.1%	0.2%	0.4%	0.7%	1.3%	3.5%	7.5%	12.9%
General Magazines	6.6%	6.1%	5.5%	5.2%	4.9%	4.6%	4.6%	3.9%	3.3%
Out of Home	3.9%	4.0%	4.4%	4.4%	4.3%	4.2%	4.5%	4.6%	4.7%

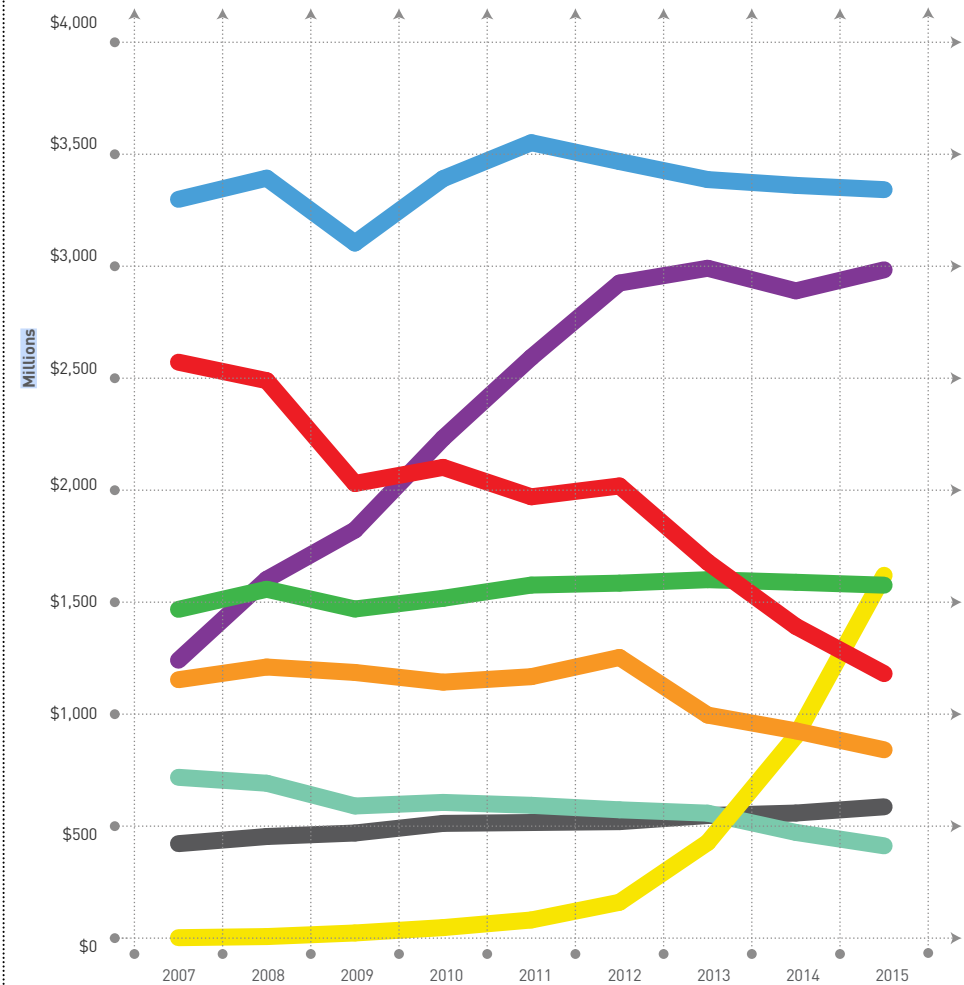
Growth of Advertising Revenue by Medium

(2007 = 100)

Medium	2007	2008	2009	2010	2011	2012	2013	2014	2015
Daily Newspaper	100%	97%	79%	82%	77%	79%	65%	54%	46%
Community Newspaper	100%	105%	103%	99%	101%	109%	86%	80%	73%
Radio	100%	106%	100%	103%	107%	108%	109%	108%	107%
Desktop	100%	129%	147%	180%	209%	236%	241%	233%	240%
Mobile	100%	350%	1150%	2350%	4050%	8000%	21350%	45150%	81000%
General Magazines	100%	96%	82%	84%	83%	80%	78%	66%	57%
Out of Home	100%	108%	111%	121%	122%	123%	130%	132%	139%
Total Reported Media Actuals	100%	105%	98%	106%	111%	115%	112%	111%	115%

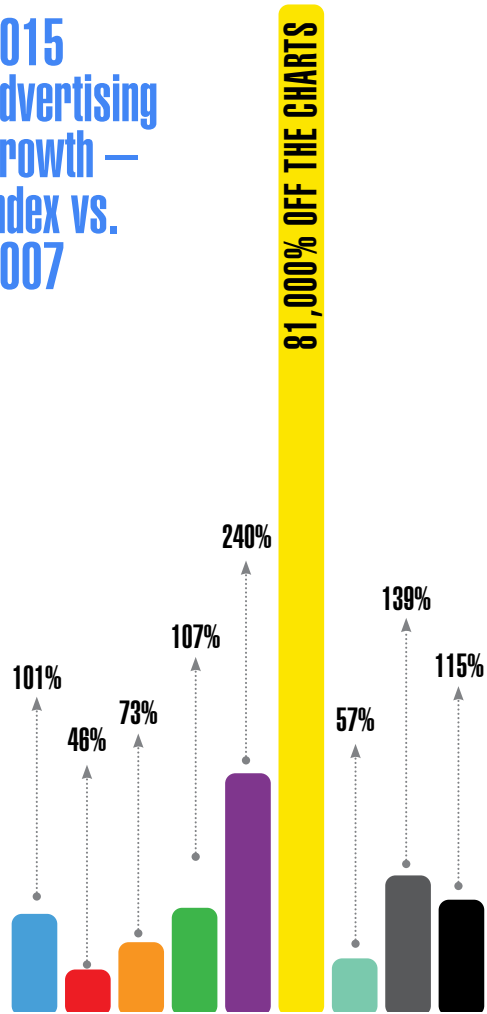
Advertising Volume Trend

■ Television ■ Daily Newspaper ■ Community Newspaper ■ Radio
■ Online ■ Mobile ■ General Magazines ■ Out of Home

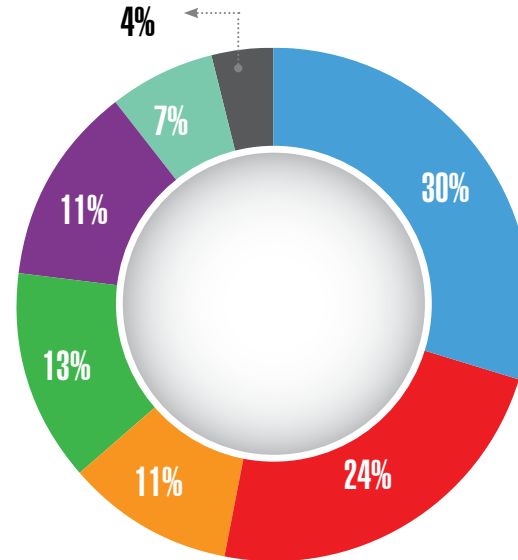
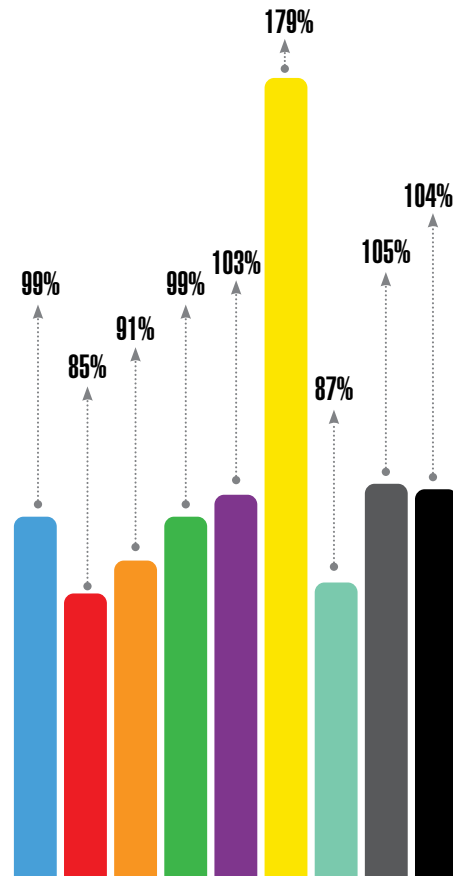


■ Television
 ■ Daily Newspaper
 ■ Community Newspaper
 ■ Radio
 ■ Desktop
 ■ Mobile
 ■ General Magazines
 ■ Out of Home
 ■ Total Reported Media Actuals

2015 Advertising Growth — Index vs. 2007

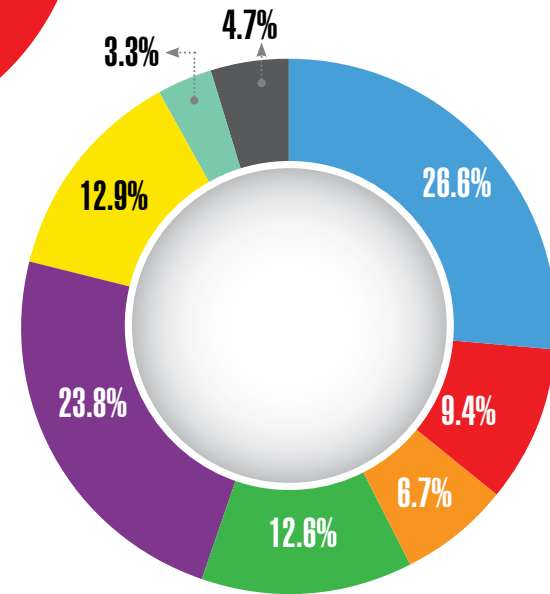


2015 Advertising Growth — Index vs. 2014



2007 Advertising Volume \$s/%

2015 Advertising Volume \$s/%



CANADIAN MEDIA DIRECTORS' COUNCIL

In the past 18 months, we have seen another round of media asset consolidation: witness the \$2.65-billion acquisition of Shaw Media by Corus Entertainment in 2016.

Corus has more than doubled in size, with a now-combined portfolio of 45 specialty television channels, 15 conventional channels, 39 radio stations and a content business.

This move catapults Corus into a race with Rogers to be Canada's second largest media company, with Bell Media retaining the No. 1 position. The acquisition gives Corus scale in the evolving pick-and-pay regulatory environment, but perhaps more importantly, in the new global economy.

Shaw used the proceeds from the asset sale to secure the acquisition of wireless carrier Wind Mobile, focusing more on broadband and wireless connectivity.

In April 2015, Postmedia completed the acquisition of Quebecor newspapers (Sun Media newspapers, 25 smaller dailies, websites and more than 140 community newspapers, trade publications and magazines). Despite the much-discussed debt load of Postmedia, the move gives the company scale with an unprecedented concentration of the country's newspapers and digital news sites; it also gives them "news content" scale in the new global economy.

And while this scaling up is about gathering and creating relevant content—most particularly, news, weather and sports—it is also about content dissemination and the transmission pipes through which consumers are reached and counted. Vertical integration has doubled in the past five years, with the key players increasing their stakes in mobile wireless, Internet access, cable, satellite and IPTV, not to mention TV and radio.

We have seen significant shifts in Canadian media consumption habits and advertising investments toward digital platforms. Yes, there are declines in print and TV ad revenue, a relatively flat revenue line for radio and out of home, and a slowing of growth in digital ad investment. But the media owners—particularly the big three—have revenues on the positive side of the ledger, and vertical integration has been the key.

The consolidated revenues of the big three are showing year over year (2015 versus 2016) positive growth: Bell from \$2.94 billion to \$2.97 billion, Rogers from



\$1.8 billion to \$2.1 billion, Corus/Shaw from \$1.8 billion to \$1.9 billion.

For some, consolidation of ownership is the dark underbelly of technology: asset monopoly turning into idea and content monopoly, turning into homogenized opinion and a degradation of quality content.

The stark reality is that scale is king, but quality content with scale is the kingmaker.

Whether it's media channels or control of wireless networks, media owners need to scale up (both horizontally and vertically) to survive in the global economy and compete against digital giants like Google, Netflix and Facebook. The communication world is different now. Canadian media owners know that and are investing in the heft of scale to compete. ●

CANADIAN MEDIA DIRECTORS' COUNCIL

Compiled by Elizabeth Clarke-Joyce
Director, Mediasystems Design, Media Experts



BDU

Television

+2 networks
+30 conventional
+34 specialty/digital
+4 pay

Radio

+106 stations

OOH

+30,000+ faces

Digital

+200+ websites

TOTAL MEDIA
REVENUE **\$2.97 BILLION**



BDU

Television

+12 conventional
+13 specialty
+42 Rogers TV

Magazines

+51 titles

Radio

+51 stations

Digital

+90+ owned
+300+ premium
partnership sites
+1 e-commerce

Subscription-based services

+Texture
+Rogers NHL
GameCentre Live
+Sportsnet NOW
+Maclean's Digital
Archives

TOTAL MEDIA
REVENUE **\$2.1 BILLION**


Television

+1 conventional network
+15 conventional stations
+45 specialty channels

Radio

+39 stations

Digital

+84+ websites
+46+ apps

TOTAL MEDIA
REVENUE **\$1.895 BILLION**


Newspapers

+3 daily newspapers
+100+ community
+7 commuter dailies
+3 specialty

Magazines

+45 titles

Digital

+12 sites
+100+ publication sites
and related mobile apps
+600+ vertically
+focused digital sites

TOTAL MEDIA
REVENUE **\$844 MILLION**


Newspapers

+58 dailies
+151 communities

Digital

+162 sites

TOTAL MEDIA
REVENUE **\$750 MILLION**


Newspapers

+8 dailies
+140+ local
newspapers

Business publications

+4 multiplatform
titles
+1 pure play website

Digital

+130+ local sites

TOTAL MEDIA
REVENUE **\$575 MILLION**


Television

+2 networks
+27 conventional
+5 specialty

Radio

+88 stations

Digital

+100+ sites

TOTAL MEDIA
REVENUE **\$528 MILLION**



BDU

Television

+1 network
+10 conventional
+8 specialty

Magazines

+70+ titles

OOH

+5,000+ faces

Newspapers

+3 dailies

N/A

This is an industry snapshot of the largest media cross-ownership in Canada. Revenues are for 2015 or the latest fiscal year and reflect media revenues only.

CANADIAN MEDIA DIRECTORS' COUNCIL

We anticipated that 2016 would be a volatile period for the Canadian market, after 2015 when “regulatory” had a dynamic, innovative, “the times they are a changing” vibe, and with the CRTC decisions from the Let’s Talk TV process being implemented over the year.

In some ways, 2016 started rather anticlimactically, until the pot was stirred in new ways by the Heritage Ministry in May. A roundup of how the year in regulatory has unfolded:

CRTC – LET’S TALK TV ROLLOUT

Skinny Basic and Pick-and-Pay

The anticlimactic part of the year came with the first-stage launch of “skinny basic” and pick-and-pay on March 1, 2016. In the words of the CRTC, March 1 was supposed to be the launch of “a new era of choice for TV viewers,” with the CRTC mandate that service providers had to offer a “skinny basic” TV package for \$25 or less that included mandatory Canadian channels and also had to provide individual or small bundle channel options.

More of a sputter than the launch of a new era. By June 30, only 177,000 Canadians had signed up for the new \$25 basic TV package, according to the CRTC (1.6% of the cable/satellite subscriber universe). Polls suggested that most respondents found the new basic package unappealing and customers definitely weren’t scrambling to sign up.

Concerns were raised about how some television service providers were implementing the new packages, and hundreds of consumer complaints were made to the CRTC and the Consumers’ Association of Canada. In response, the CRTC called a public hearing, as part of broadcaster licensing renewal hearings.



So far, the new era of choice for TV viewers is pretty similar to the old one.

What’s Next? The CRTC public hearing started Sept. 7. The BDUs reported that implementing skinny basic and the flexible pricing options is an ongoing complex process.

By Dec. 2016, all discretionary services will have to be offered on both a pick-and-pay and a small package basis by all licensed BDUs. This will include all ethnic and third-language services. Some BDUs have accelerated their schedules of offering pure pick-and-pay.

Some channels will not survive in an environment marked by greater subscriber choice, while others will adapt and thrive. Which is which will not be confirmed until we are into the implementation. Long term, this could put upward pressure on advertising rates for remaining, reduced inventory in the system. Much still depends on the pricing models established by the BDUs.

Super Bowl Simultaneous Substitution

In Jan. 2015, the CRTC stated its intention to prohibit the practice of simultaneous substitution or “simsub” for the Super Bowl, starting in 2017.

As early as March 2, 2015, Bell Media filed a motion with the Federal Court of Appeal seeking leave to appeal, calling the decision unfair and saying the CRTC acted in error. In July 2015, the National Football League filed, requesting intervenor status in the appeal. The case has been weaving

CANADIAN MEDIA DIRECTORS' COUNCIL

its way through the courts since, with the appeal heard in June 2016.

On Aug. 19, 2016, the CRTC issued its official order to stop simultaneous substitution during the NFL championship event as of 2017, despite the ongoing lawsuit.

On Sept. 2, 2016, the appeals from the telco and the NFL were dismissed on a timing technicality, as the CRTC official order had not been issued at the time that Bell and the NFL filed their appeal.

What's Next? Bell is expected to re-file the appeal as soon as possible, still wanting a decision to be issued well in advance of the airdate of Super Bowl in Feb. 2017.

Set-Top Box Audience Measurement

The industry was required to form a working group to develop an audience measurement system based on set-top box data. This group has been working through a myriad of issues, including governance structure, technical standards, privacy protections and research guidelines that will need to be established before an industry-wide system can be launched.

What's Next? We anticipate more public reports on progress in fall 2016 and that there will be a minimum 12-month timeframe before STB audience data will be introduced.

HERITAGE CANADA CONSULTATIONS

On April 23, 2016 the Canadian Heritage Ministry unexpectedly launched a public consultation on cultural policies with the intention of strengthening Canadian content creation, discovery and export in a digital world.

The scale of the review and the potential impact have not been seen in more than 25 years since the Broadcasting Act was last revised in 1991.

Not all of the issues being reviewed impact the advertising media business directly, but there are some that could have a substantial impact on how we do business and the media environment in which we operate.

Laws:

- Broadcasting Act, which ensures that Canada's broadcasting system is owned and controlled by Canadians, and enhances Canada's national identity
- Canadian Radio-television and Telecommunications Commission Act, which lays out the mandate for Canada's regulator, the CRTC

Institutions:

- CBC: Canada's public broadcaster that operates on television, radio and online

Policies:

- Foreign-investment policies that protect the book, magazine and film-distribution industries
- Rules that regulate Canadian content on television and radio

Programs:

- Canadian Periodical Fund

Throughout 2016, Postmedia has been proposing changes to aid the struggling newspaper industry:

- that foreign ownership rules barring majority control of media companies by foreigners be loosened
- a tax incentive that would allow ads placed with a Canadian company to be written off at a higher rate than ads bought from foreign-owned companies such as Google
- that the Aid to Publishers program, which supports magazines and periodicals, be extended to daily newspapers
- introduction of a national tax credit to support innovation in digital news

There has not appeared to be much industry support for these particular propositions, but it is expected that they will be covered and considered as part of the overall Heritage Canada review.

There are two phases to the review:

1) Public pre-consultation ran until May 20, 2016 via an Internet poll. The questions touched on a variety of issues including:

- Existing limits on foreign ownership of media companies
- Canadian content rules for television and radio
- The CBC's priorities for the future

2) Public hearings in fall 2016

It's been another year when regulatory issues have captured the interest of consumers and marketers alike with much active discussion in the consumer and trade press. The next months will bring more stimulating decisions and discussion. Stay engaged! ●

Online interest-based advertising may be considered reasonable under the Personal Information Protection and Electronic Documents Act (PIPEDA), provided it is carried out under certain parameters. The AdChoices program aims to help you with that compliance.



It has been another productive year for the Digital Advertising Alliance of Canada, with the CMDC as one of the eight organizations leading the way in our self-regulatory work.

Our program aims to bring interest-based advertising (IBA) to the forefront for consumers.

The program is based on six key principles: education, transparency, consumer control, data security, sensitive data and accountability. Each principle has requirements that participants pledge to adhere to. As a collective, every entity that touches interest-based data—whether by allowing third parties to collect on your site, or transferring data to another entity for IBA purposes, for example— is responsible in upholding the consumer’s right to notice and choice.

Education remains a key goal for the DAAC, for both consumers and industry alike. If you haven’t yet learned about the AdChoices program, be sure to visit our website, www.YourAdChoices.ca, to see all we’re doing to help make consumers more aware of interest-based advertising.

Growth this year was strong amongst advertisers.

Many advertisers have come up with creative ways to handle the requirements found within principles. P&G is an excellent example of an advertiser embracing the



program, and for publishers, the *Globe and Mail* has done a stellar job of showing that “above the fold” notice for AdChoices is possible.

Thank you to those companies, and to all 75 participants who take consumer privacy seriously.

This was our first year exhibiting at events, with the CMDC conference in April being our inaugural outing. The neon blue icon we had at our booth was hard to miss. At the conference, we launched our privacy game to help educate the industry about the Canadian AdChoices program. It was great fun to watch the players navigate sometimes tricky privacy questions.

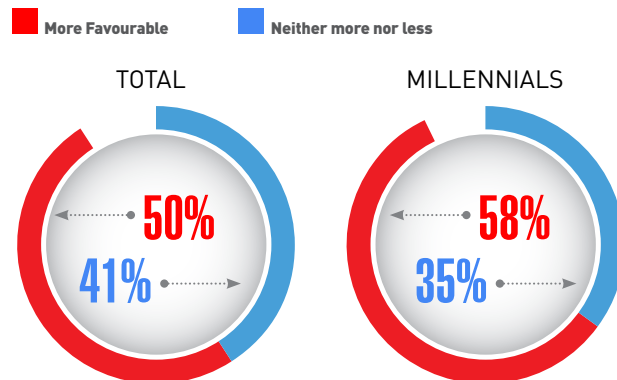


CMDC Conference attendees playing our AdChoices game on their smartphones.

CANADIAN MEDIA DIRECTORS' COUNCIL

Another first for this year was our icon awareness survey. We wanted to conduct a survey to measure awareness of interest-based advertising and AdChoices, as well as the related impact on consumers' comfort level with IBA and participating brands. The survey was conducted by Toronto research firm Synqrinus, and consisted of 1,000 Canadians aged 18–64.

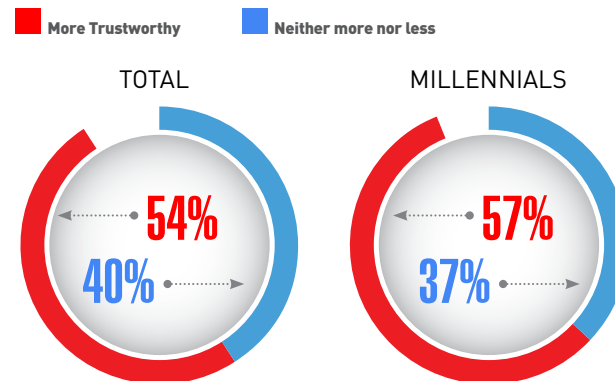
Half of Internet users report a more favourable opinion of interest-based advertising when they learn about the AdChoices program.



Q. Thinking about the description you just read, how does having access to the information on this website, and the option to manage your privacy preferences, affect your overall opinion of online interest-based advertising?

The results were motivating—overall awareness was on par with other countries that have launched the program and there is a clear trust dividend brands receive by being associated with AdChoices; a testament to the education that participants are providing.

Over half of Internet users report a higher level of trust in brands based on the option to manage their privacy preferences via AdChoices.



Q. And thinking about the description you read, how does the opinion to manage your privacy preferences through the AdChoices icon affect your level of trust in the brand being advertised?

The findings also highlight just how savvy millennials are—they understand the trade that takes place between their interest data and the services they receive online, and as well, their favourability and trust increases more than any other segment for brands that use our program.

Mobile is still actively on the horizon—day by day we get closer to launching our mobile principles, with development happening for device ID opt-out tools. Be sure to keep watch for announcements in this area in the coming months.

A big thank you to the many agencies I've spoken to over the last year and to those who have helped to onboard clients and third parties onto this important self-regulatory program. I look forward to working with more of you in the future.

Let's show the OPC that our industry can remain self-regulated. We must do this together for it to truly make an impact. ●

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From Peripheral to Central: The Evolving Role of Technology

In last year's Media Digest, I referenced the dawn of a new era of media measurement, driven by a wave of technological innovation and the accelerating convergence of platforms, channels and techniques.

Beyond measurement, technology evolution is unlocking a wealth of new marketing opportunities, from omnichannel targeting and dynamic personalization to virtual and augmented reality. But evolution rarely comes without disruption. The role of technology is shifting from peripheral to central and forcing our industry to adapt.

The current marketing technology ecosystem is in a sustained state of flux and we are being challenged on three fundamental levels: ownership, expertise and partnership.

Ownership Conundrum

Tech stack, data stack, unified stack, point stack, full stack developer, full stack marketer. We all seem to be obsessed with stacks.

Funded by the epic investments of the "stackzillas" (Adobe, Oracle, Salesforce, Google), the rise of the stack has been propelled by the technical integration of two historically distinct silos: marketing technology, crudely defined as technology focused on the customer; and advertising

technology, focused on the prospect. This collision is challenging established ownership norms—agency and adtech, brand and martech—in particular around holistic data management and DMPs (data management platforms). While each brand's approach will vary based on scale, maturity and vertical, the stakeholders have already changed: chief technology officers, chief information officers and chief digital officers are now all at the table, driven by enterprise technology considerations. Agencies must brace themselves for new challenges, new clients and new ownership models. Adtech cannot and should not continue to operate as an agency-owned silo.

Expertise Vacuum

As technology innovation unlocks opportunity, new questions and challenges arise. Many initially fall between the cracks as the established boundaries of marketing disciplines rapidly blur. An expertise vacuum has emerged as our industry takes time to address the service, skill and resource gaps.

Consider the opportunity around ad personalization. As martech has honed personalization via email, SMS and web since the advent of Amazon's recommendations engine, adtech has languished behind, perhaps distracted by the explosive growth opportunity of programmatic. (And for those eager to protest, crude product retargeting ads do not count as personalization!) Few, if any, viable solutions exist off the shelf and even basic ad personalization requires a custom solution involving several platforms.



Joseph Leon | President, Media, V7i

In this technology gap—between DSP, DMP, adserver, CMS and customer database—lies a thought leadership vacuum and brands need guidance. More than any other discipline, our knowledge of measurement, data and ad platforms should allow media

agencies to transcend specialism boundaries; to develop a new, broader technological fluency; and transition our clients into this new age of technology as core.

Partnership & Collaboration

As witnessed by the expertise vacuum above, the surge in integrated solutions and the growing trend for multi-agency pitch teams, technology evolution is proving a potent catalyst for industry change. Quality media services are no longer viable without deep technology fluency, CRM expertise and data management capabilities.

Media agencies must learn to partner, collaborate and ultimately integrate with new teams, new agencies and new clients. Technology has made the silos and niche thinking of the past unsustainable. Openness, adaptability and breadth will triumph. ●

CANADIAN MEDIA DIRECTORS' COUNCIL

The Pendulum Swings Back

Tumultuous changes in media habits compel a breakdown of silos

Who could have predicted that millennial media habits would force our industry back to a practice that predates the segment? Realistically, it is not just millennials forcing this change in the way we work—it is the entire tumultuous communication landscape. But nowhere along the segmentation spectrum is the need for this change exemplified as it is with millennials. The notion of creative, media and digital working very closely together as one unit seems new these days—interestingly, what is old is new again.

There is serious appetite for this way of working in our business today. We hear it regularly from clients, prospective clients and consultants. Recently, Harley-Davidson awarded IPG its global business based on this premise. Shelley Paxton, VP of global marketing and brand at Harley-Davidson, told *Advertising Age*: “We were not looking at the key disciplines in silos. Creative, digital and media, in my view, absolutely has to be a single strategy to live together in this day in age.”

All too often, media planning and buying is segregated, either across the city or across the continent, and furthermore by P&L—from creative strategy and digital. More often than not, true conversion analytics are not integrated at all. Out of necessity, due to increases in complexity, we have created a working ecosystem over the past 25 years that is seriously fragmented. It is a challenge to put the right message to the right target at the right moment if all disciplines are not working closely together with a unified strategy. If the team is not working closely together, the communications do not perform; if the communications do not perform, we lose clients.



Nowhere is this need for the disciplines to work closely together embodied as it is when engaging millennials. The most digital of all segments is a challenge to reach: in Canada, a quarter of millennials are ad blocking, nearly one third of them watch mostly Netflix with no ads, and nearly half “always or almost always” use their phone while watching TV.

Notably, 66% prefer ads that are targeted to their interest, so there is a way in. Media, creative strategy and digital really need to work hand-in-hand to be successful here and it is forcing us to work differently to produce better results. For some of us who have been around long enough, it is making us work more like we used to in the full-service model. So, it seems the pendulum has swung back and we begin witnessing a breakdown of the silos. ●

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Canadian Millennial Media Habits: Fast Facts

MALE

MILLENNIALS 18-34

FEMALE

28%

DESKTOP AD BLOCKING RATES¹

22%

June 2015-Jan. 2016

PRIMARY PLATFORM
USED BY ADULTS TO
WATCH TV²

December 2015

NETFLIX

31%

ALWAYS

12%

FREQUENCY OF MOBILE PHONE USE WHILE WATCHING TV³

March 2014

ALMOST
ALWAYS

30%

PREFERRED TYPES OF
DIGITAL ADS AMONG
INTERNET USERS⁴

March 2016

ADS TARGETED TO
YOUR INTERESTS

66%

Source:

1. Interactive Advertising Bureau of Canada (IAB Canada) and comScore Inc., "IAB Canada Ad Blocking Study" sponsored by intact Financial Corporation, May 24, 2016.

2. Thinktv (formerly Television Bureau of Canada (TVB), "Attitudes and Viewing Preferences" conducted by NLogic: eMarketer calculations, March 21, 2014

3. Thinktv (formerly Television Bureau of Canada (TVB), "Video Ads & Attention: An NLogic OmniVy Survey" conducted by NLogic, April 21, 2016

4. Interactive Advertising Bureau of Canada (IAB Canada) and comScore Inc., "IAB Canada Ad Blocking Study" sponsored by intact Financial Corporation, May 24, 2016.



CANADIAN MARKET DATA + CONSUMERS

CANADA'S "BEST PLACES"

PROVINCIAL DATA

POPULATION GROWTH

ETHNIC GROUPS

MILLENNIALS

CANADA VS. U.S.

COMMENTARY

As we approach our 150th birthday, we are reminded of Canada's unique place on the planet.

Often accused of having an inferiority complex, it turns out we have lots to brag about: Canada was ranked the second best country to live in the world (behind Germany), and No. 1 for quality of life, according to the 2016 “Best Countries Ranking” from *U.S. News and World Report*. Our stable economy and relatively good job market, as well as our well-developed public health and education systems have helped take Canada to the top of the listing.

Canada is also known for being family-friendly and welcoming to immigrants and refugees from all over the world, making for an incredibly diverse and vibrant population. Canada receives immigrants from nearly 200 countries around the world, and in 2016, we welcomed more than 25,000 Syrian refugees who have come to call Canada home.

In 2016, Canadian artists are being recognized globally and have made headlines for a number of achievements. For the first time, seven of the top 10 singles on the Billboard Hot 100 Chart were by Canadian artists. Quebec

filmmaker Xavier Dolan won the Grand Prix award at the Cannes Film Festival this year for his film, *Juste la fin du monde*, and interest in the work of Group of Seven artist Lawren Harris has been renewed by actor and art collector Steve Martin.

Even our new Prime Minister, Justin Trudeau, was the toast of Washington in March 2016, when he was welcomed to the first White House State Dinner for a Canadian prime minister in 19 years.

While our hockey teams have fared better in past seasons, our baseball and basketball teams achieved better success. The Toronto Blue Jays made a return to the playoffs in 2015 and claimed the AL East division title—their best showing in years. Our only NBA team, the Raptors, made it to the Eastern Conference Finals for the first time in history, putting up an impressive fight before falling to the Cleveland Cavaliers. And Toronto's hosting of the NBA All Star Game was a highlight of the 2016 season.

As we mark a milestone with our 150th birthday in 2017, Canada is finding a new confidence on the global stage, and with it comes new opportunities for marketers. Virtually all of our population growth is fuelled by immigration, which will make a radical difference to the Canadian consumer portrait in the coming years.

Our technology industry is rapidly evolving with big investments by major companies in innovation. And shifting tastes and consumer preferences are becoming increasingly tech-enabled. The move towards easier



Chris Herlihey | Vice-President Research, IPG Mediabrands

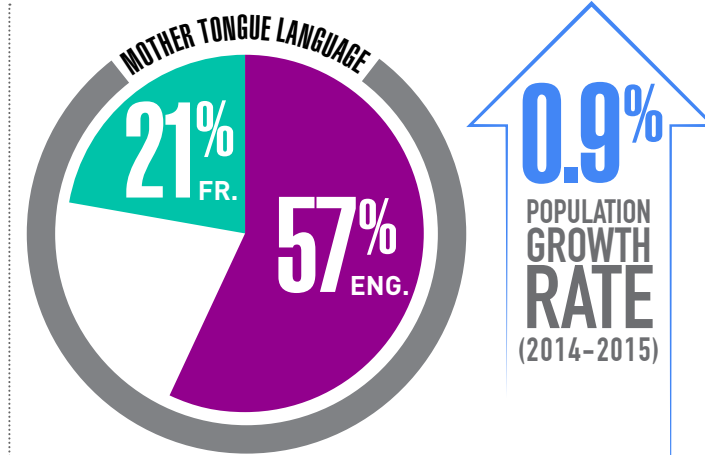
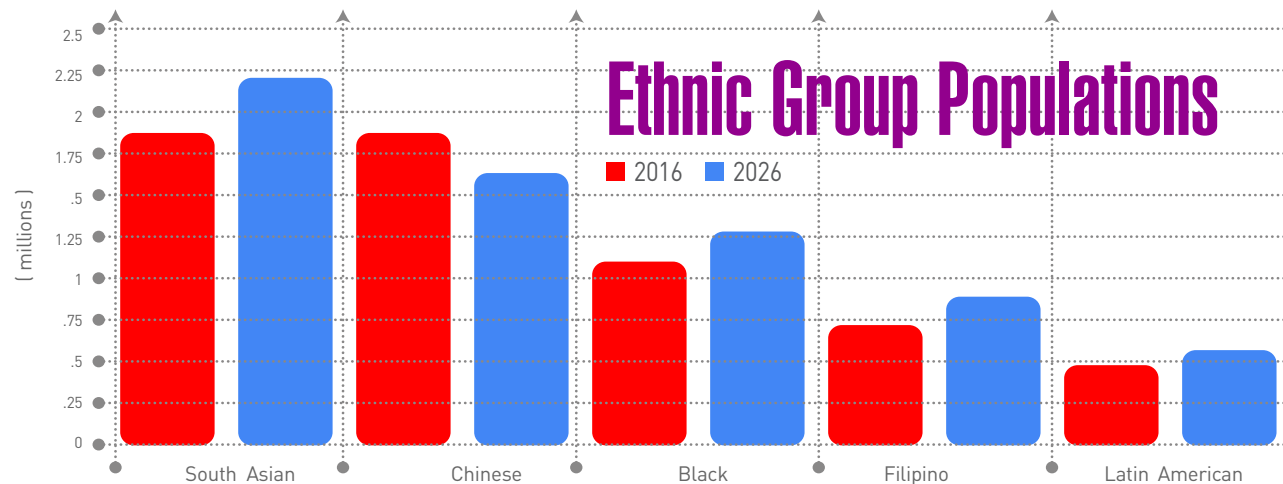
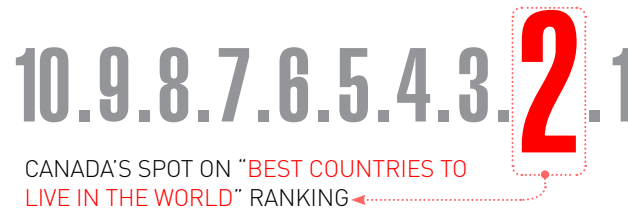
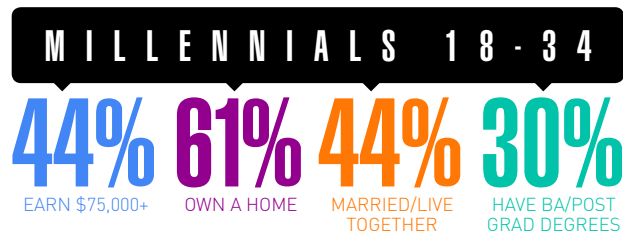
access to an “everything mobile” world has implications for almost every sector—retail, automotive, entertainment, travel, finance and CPG. These industries are all being impacted by the changes in the Canadian consumer landscape as we move further into the 21st century.

As marketers, we will need to evolve with a Canadian consumer who is more diverse, more confident and more empowered than ever before. ●

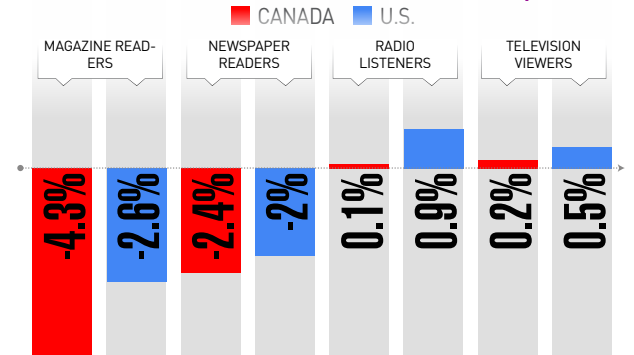
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NUMBER OF PEOPLE LIVING IN CANADA



Canada vs. U.S. Growth in media channels, 2016




\$76,550 MEDIAN FAMILY INCOME

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CANADA WAS RANKED THE SECOND BEST COUNTRY TO LIVE IN THE WORLD AND NO. 1 FOR QUALITY OF LIFE, ACCORDING TO THE 2016 "BEST COUNTRIES RANKING" FROM *U.S. NEWS AND WORLD REPORT*

ADVENTURE	15 TH	POWER	11 TH
CITIZENSHIP	2 ND	QUALITY OF LIFE	1 ST
CULTURAL INFLUENCE	11 TH	CITIZENSHIP	2 ND
ENTREPRENEURSHIP	5 TH	EDUCATION	2 ND
HERITAGE	29 TH	START A CAREER	5 TH
MOVERS	31 ST	BEST GREEN LIVING	5 TH
OPEN FOR BUSINESS	3 RD	MOST INFLUENTIAL COUNTRIES	10 TH



BEST
COUNTRY
OVERALL
2ND

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Best Places To Live in Canada

1. Ottawa, Ontario
2. Burlington, Ontario
3. Oakville, Ontario
4. St. Albert, Alberta
5. Boucherville, Quebec

Best Places to Retire

1. Rimouski, Quebec
2. Ottawa, Ontario
3. Toronto, Ontario
4. Stratford, Ontario
5. Victoria, BC

Best Places to Raise Kids

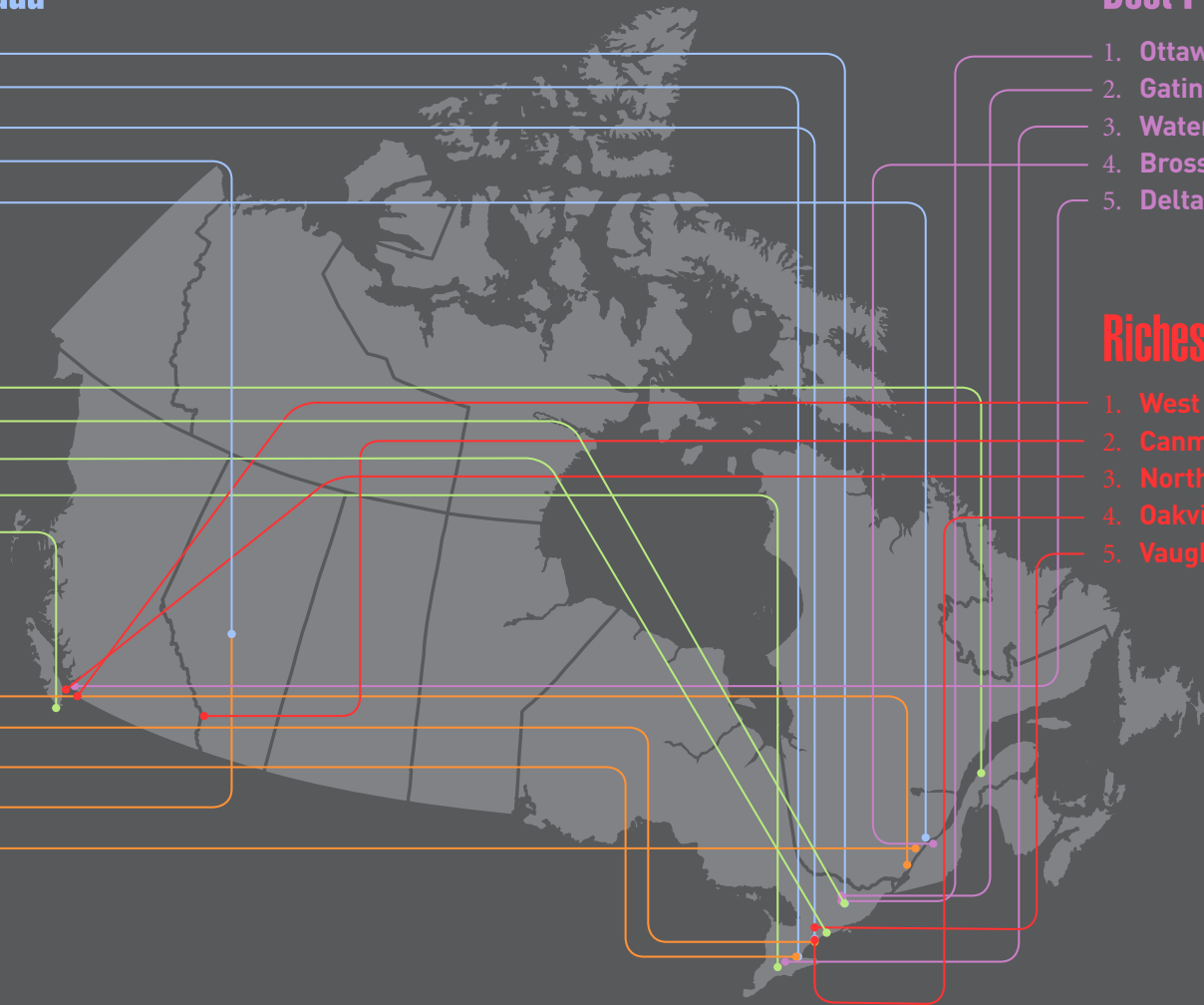
1. Blainville, Quebec
2. Oakville, Ontario
3. Burlington, Ontario
4. St. Albert, Alberta
5. Lévis, Quebec

Best Places for New Canadians

1. Ottawa, Ontario
2. Gatineau, Quebec
3. Waterloo, Ontario
4. Brossard, Quebec
5. Delta, BC

Richest Places 2016

1. West Vancouver, BC
2. Canmore, Alberta
3. North Vancouver, BC
4. Oakville, Ontario
5. Vaughan, Ontario



(Source: MoneySense)

CANADIAN MEDIA DIRECTORS' COUNCIL

Brands

THREE CANADIAN BRANDS WERE MENTIONED IN THE 2016 BRANDZ MOST VALUABLE BRANDS REPORT BY WPP AND MILLWARD BROWN

(four if you count the now-foreign-owned Tim Hortons, which built its brand on Canadiana.)

Most Valuable Brands

1	Google
2	Apple
3	Microsoft
4	AT&T
5	Facebook
6	Visa
7	Amazon.com
8	Verizon
9	McDonald's
10	IBM
45	RBC
60	TD

Apparel Top 10

1	Nike
2	Zara
3	H&M
4	Uniqlo
5	Under Armour
6	Victoria's Secret
7	Adidas
8	Next
9	Ralph Lauren
10	Lululemon

Fast food Top 10

1	McDonald's
2	Starbucks
3	Subway
4	KFC
5	Pizza Hut
6	Chipotle
7	Domino's Pizza
8	Tim Hortons
9	Burger King
10	Panera

Source: WPP and Millward Brown

Billboard Hot 100 Chart

January 2, 2016

- | | |
|---|---|
| 1 Hello
Adele | 6 Same Old Love
Selena Gomez |
| 2 Sorry
Justin Bieber | 7 The Hills
The Weeknd |
| 3 Hotline Bling
Drake | 8 Here
Alessia Cara |
| 4 Love Yourself
Justin Bieber | 9 Stitches
Shawn Mendes |
| 5 What Do You Mean?
Justin Bieber | 10 Like I'm Gonna Lose You
Meghan Trainor
featuring
John Legend |

For the first time, 7 of the top 10 singles were by Canadian artists

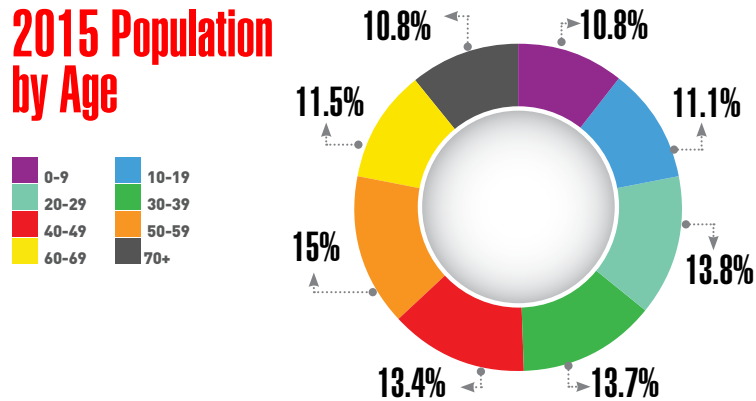
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Provincial Data

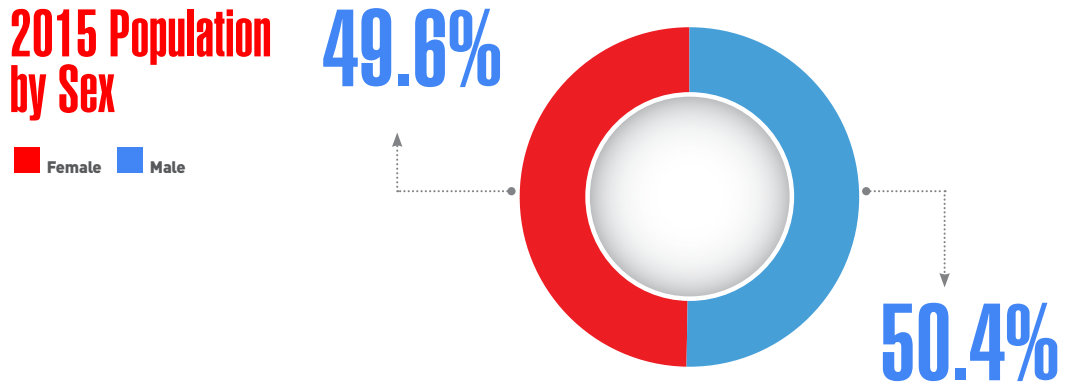
	2015 POPULATION (000)	Pop % Canada	2010 Pop (000)	% change from 2010	2011 Private Households (000)	2013 Median Family Income	2014 Retail (\$MM)	Retail % Canada	2015 Retail (\$MM)	Retail % Canada
Canada	35,852		34,005	5.4%	13,321	\$76,550	\$505,008	100%	\$513,383	100%
Newfoundland and Labrador	528	1%	522	1.1%	209	\$73,850	\$8,882	2%	\$8,900	2%
Prince Edward Island	146	0%	142	3.3%	56	\$70,270	\$2,005	0%	\$2,052	0%
Nova Scotia	943	3%	942	0.1%	390	\$70,020	\$13,915	3%	\$13,827	3%
New Brunswick	754	2%	753	0.1%	314	\$67,340	\$11,528	2%	\$11,808	2%
Quebec	8,264	23%	7,929	4.2%	3,395	\$72,240	\$108,137	21%	\$108,727	21%
Ontario	13,792	38%	13,135	5.0%	4,888	\$76,510	\$176,719	35%	\$184,143	36%
Manitoba	1,293	4%	1,221	5.9%	466	\$72,600	\$18,034	4%	\$18,297	4%
Saskatchewan	1,134	3%	1,051	7.8%	410	\$82,990	\$19,143	4%	\$18,477	4%
Alberta	4,197	12%	3,733	12.4%	1,390	\$97,390	\$78,582	16%	\$74,989	15%
British Columbia	4,683	13%	4,466	4.9%	1,765	\$74,150	\$66,273	13%	\$70,272	14%
Yukon	37	0%	35	8.1%	14	\$95,360	\$661	0%	\$692	0%
Northwest Territories	44	0%	43	1.9%	15	\$109,670	\$774	0%	\$808	0%
Nunavut	37	0%	33	10.6%	9	\$63,300	\$355	0%	\$392	0%

Source: Statistics Canada

2015 Population by Age



2015 Population by Sex



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Census Metropolitan Areas

% of Canada Population of Census Metropolitan Areas

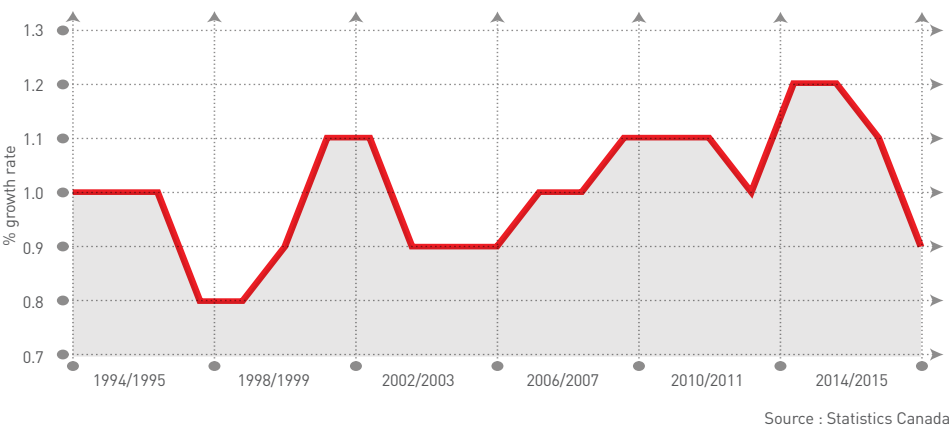
	2015 Pop (000)	Pop % Canada	2014 Pop (000)	% Change from 2010	2011 Private Households (000)	2013 Median Family Income	Family Income Index to Total Canada
Canada	35,852		35,544		13,321	76,550	100
CMAs	25,164	70%	24,869		8,677	n/a	
St. John's (N.L.)	214	1%	212	0.9%	79	91,100	119
Halifax (N.S.)	418	1%	414	1.0%	165	82,510	108
Moncton (N.B.) ¹	148	0%	146	1.3%	58	73,550	96
Saint John (N.B.)	127	0%	128	-0.5%	52	73,600	96
Saguenay (Que.)	160	0%	160	-0.2%	70	75,360	98
Québec (Que.)	806	2%	801	0.7%	346	84,160	110
Sherbrooke (Que.)	215	1%	213	0.9%	91	70,710	92
Trois-Rivières (Que.)	156	0%	156	0.3%	70	68,430	89
Montréal (Que.)	4,061	11%	4,028	0.8%	1,613	73,250	96
Ottawa-Gatineau Ontario part, (Ont.-Que.)	1,001	3%	990	1.1%	367	101,070	132
Ottawa-Gatineau Quebec part, (Ont.-Que.)	331	1%	327	1.3%	131	86,100	112
Kingston (Ont.)	170	0%	169	0.8%	66	82,950	108
Peterborough (Ont.) ¹	123	0%	123	-0.2%	49	73,280	96
Oshawa (Ont.)	389	1%	384	1.3%	130	87,400	114
Toronto (Ont.)	6,130	17%	6,053	1.3%	1,990	72,830	95
Hamilton (Ont.)	772	2%	765	0.8%	282	82,290	107
St. Catharines-Niagara (Ont.)	408	1%	407	0.3%	160	69,500	91
Kitchener-Cambridge-Waterloo (Ont.)	511	1%	507	0.8%	181	82,160	107
Brantford (Ont.) ¹	144	0%	143	0.8%	53	71,630	94
Guelph (Ont.)	153	0%	151	1.1%	55	88,700	116
London (Ont.)	506	1%	503	0.7%	195	75,980	99
Windsor (Ont.)	336	1%	334	0.4%	127	73,440	96
Barrie (Ont.) ¹	203	1%	200	1.2%	68	80,780	106
Greater Sudbury (Ont.)	165	0%	165	-0.3%	68	86,080	112
Thunder Bay (Ont.)	125	0%	125	-0.2%	52	82,690	108
Winnipeg (Man.)	793	2%	783	1.4%	291	77,770	102
Regina (Sask.)	241	1%	237	1.9%	86	93,670	122
Saskatoon (Sask.)	305	1%	299	2.0%	104	90,840	119
Calgary (Alta.)	1,440	4%	1,406	2.4%	46	101,260	132
Edmonton (Alta.)	1,363	4%	1,332	2.4%	451	98,480	129
Kelowna (B.C.) ¹	197	1%	191	3.2%	75	76,870	100
Abbotsford-Mission (B.C.)	184	1%	181	1.4%	59	68,310	89
Vancouver (B.C.)	2,504	7%	2,476	1.2%	891	73,390	96
Victoria (B.C.)	365	1%	361	1.1%	153	84,500	110

1 - Family median income was not available, figures reflect 2010 data

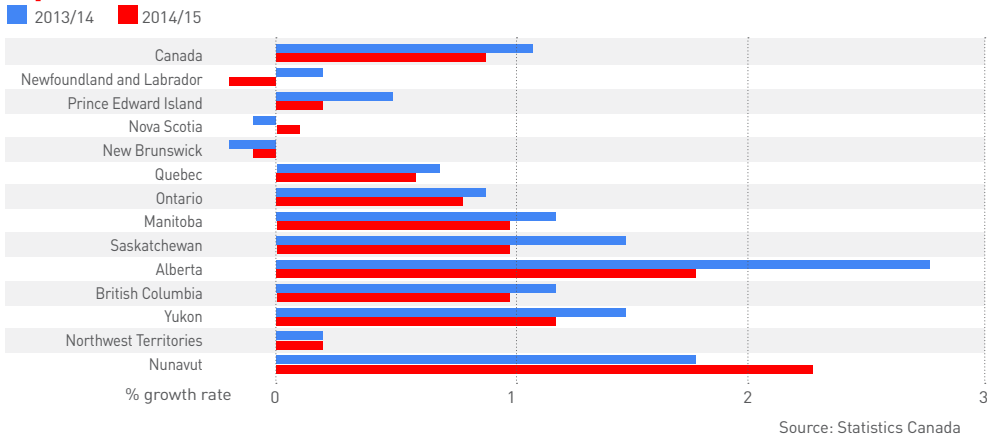
Source: Statistics Canada

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Population Growth Rate in Canada

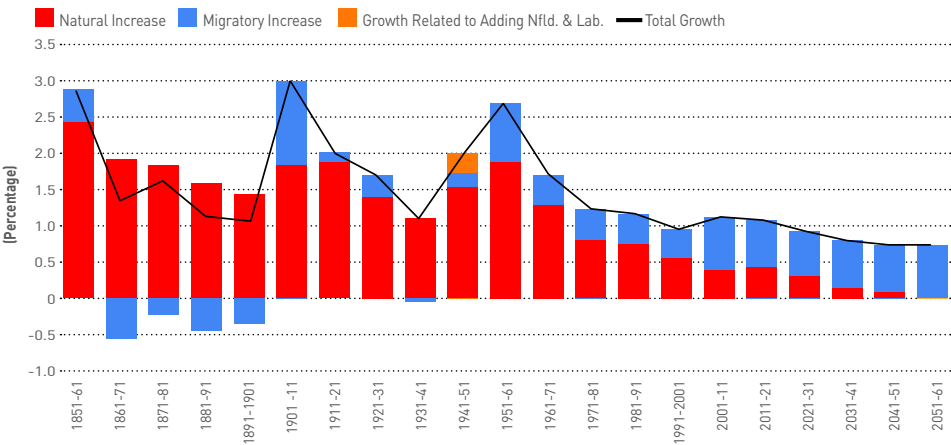


Population Growth Rate 2013/2014 and 2014/2015, Canada, Provinces and Territories



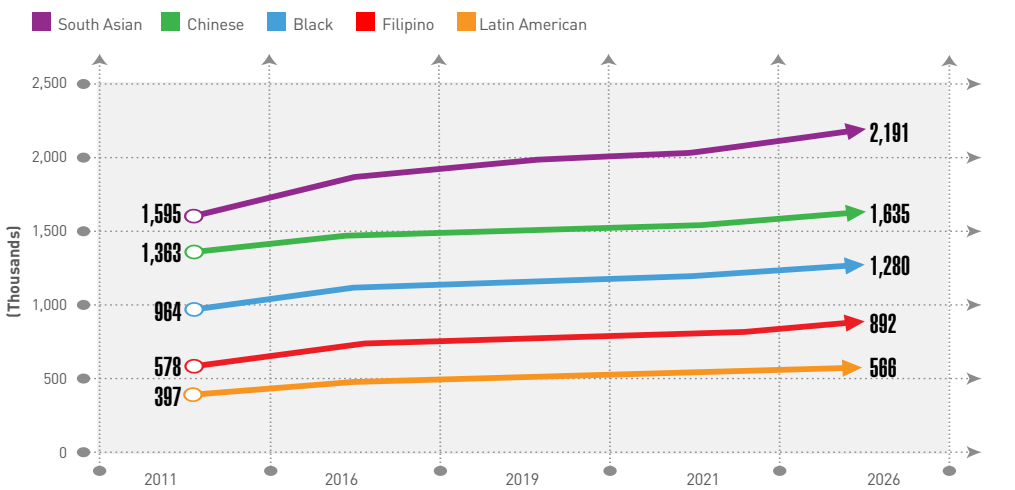
Annual Growth Rate

Natural Increase and Migratory Increase per Intercensal Period - Canada 1851-2061



Source: Population growth in Canada: From 1851 to 2061, Census in Brief, 2011 Census of Population (98-310-X), Statistics Canada, 2012.

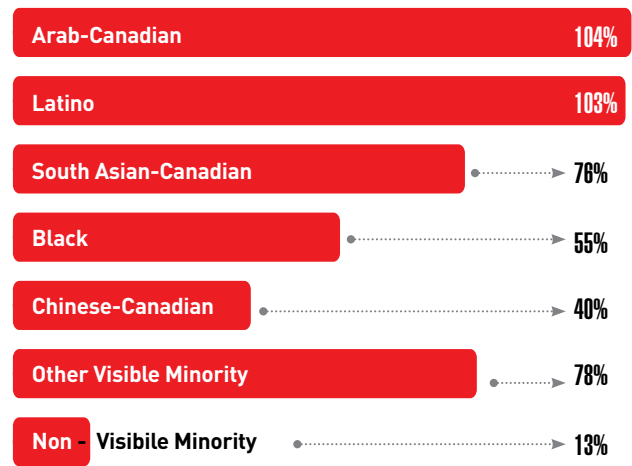
Population of the Largest Ethnic Groups in Canada, 2008-2023



Source: Statistics Canada

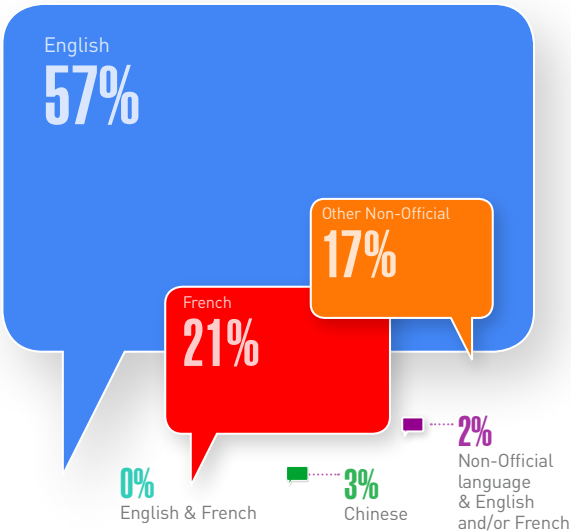
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Consumer Spending Growth in Canada, by Ethnicity, 2013 (% Change)



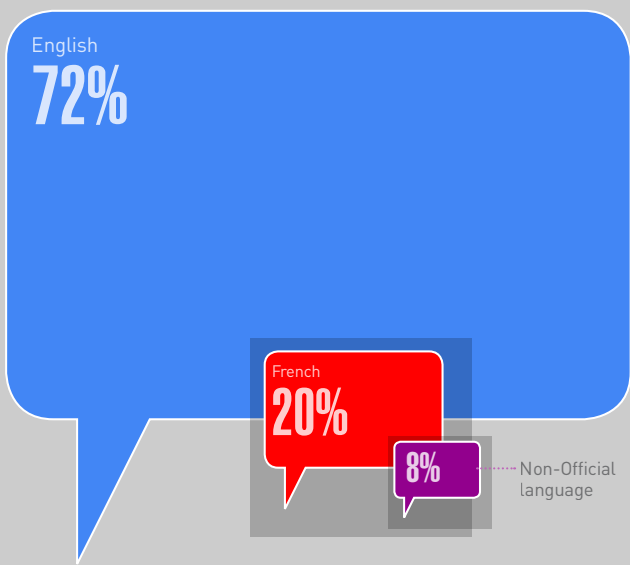
Source: Environics Analytics, "Ethnic Marketing in Canada," Aug 13, 2013

Mother Tongue Language



Source: Demostats Trends 2016

Language Most Often Spoken at Home



Source: Vividata 2015 Q4 Readership and Product Database

COMMENTARY

Are Millennials Lilliputians?

In 1726, Jonathan Swift's *Gulliver's Travels* was published in a safe and strictly edited form, but thankfully, this deeply satirical manuscript was published later in its original, unedited form in 1735. Gulliver, our travelling protagonist, observed strange and imagined countries, and at one point he was held prisoner by a race of tiny people he called the society of Lilliputians.

Almost daily, the media and marketing community encounters a "society" of consumers called the "millennials." Here are a few recent headlines:

"Millennials distrustful of Canada's food system, survey finds"

"The war on millennials: Why they really do have it harder than you did"

"Millennials in denial over costs of mounting debt"

Like Swift's Lilliputians, millennials possess imagined and mythical characteristics that go beyond the constraints of a simple age-based target group, assuming characteristics that say more about the "targeters" than about the targeted. Are millennials really something special or are they simply an age group—a kind of ageist version of those Lilliputians?

"Millennial" is a term coined in 1987 to categorize an age cohort born between 1980 and 2000. Today these folks are

16-36 years of age – a close match to the popular 18-34 media age break. Also referred to as Generation Y, Generation Me or Echo Boomers, this group has been endlessly analyzed, defined and redefined and the result is a confusing pile of contradiction as this list attests:

Millennials	Generation Y
Generation Me	Echo Boomers
Civic Minded	Narcissistic
Detached	Network
Coddled	Ignored
Work/Life	Money
Team Players	Loners
Prudent	Extravagant

There are 8.4 million millennials in Canada today—almost 30% of Canada's 12+ population. The 18-34 demographic is roughly the same size as the 35-54 and 55+ segments, which begs the question... is this a target or a census?

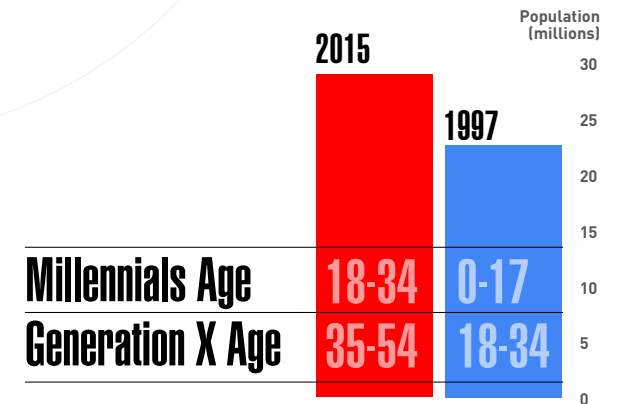
One way of determining if millennials are a target full of superheroes or just an overblown age group is to compare today's millennials to the 18-34 cohort from 20 years ago who grew up to become today's Generation X



(now 35-54 year olds). In other words, are they different than the 20-year-old versions of themselves?

To do this, we profiled the current 18-34 group using Vividata and turned to an old PMB '97 study to determine the profile of the 18-34 demographic from yesteryear.

18-34 Demographic comparison



Source: Vividata 2015 Q4 | Source: PMB '97

(A big thanks to IMS who were able to track down the old PMB'97 study and blow the dust off the software needed to read this "ancient" data.)

A LOT HASN'T REALLY CHANGED VERY MUCH.

There are a few more of them now.

There are 8% more 18-34-year-olds today compared to 20 years ago, which matches the growth rate for the overall population.

THE AGE PROFILE HASN'T CHANGED MUCH.

Back in 1996, 18-24-year-olds made up 37% of all 18-34-year-olds. Today, the 18-24 year age composition is comparable. A common marketer mistake is the belief that millennials are 20-year-olds. Twenty-somethings do not a millennial make.

Income growth is inflationary.

In 1996, 44% of this age group earned \$50,000+. Today, 44% of millennials earn \$75,000+. The buying power between these two earning levels is comparable.

Home ownership is stable.

Twenty years ago, 64% of those aged 18-34 owned their home and the figure today is 61%. The degree of financial hardship behind that owned home has probably intensified over the 20 years, but the desire for home ownership is unchanged.

Kids at home is the same.

Twenty years ago, 47% of those aged 18-34 had kids under the age of 18 in the home and this proportion hasn't changed.

Marital status is unchanged.

Today, 44% of millennials are married/living together—virtually identical to the proportion (42%) 20 years ago.

BUT SOME THINGS HAVE CHANGED.

Today's millennials have higher levels of educational attainment.

Since my great-grandfather's era, every generation has exhibited a rising level of educational attainment and today's millennial is no exception. BA/post-grad degrees are held by 30% of today's 18-34-year-olds, compared to only 16% who had those degrees in 1996. Yes, millennials are better educated, but no more so than the average for the 12 + population.

Community size has changed: bigger markets.

Over the 20-year period, the proportion of millennials living in one-million+ markets grew from 34% to 51%. In some cases, the market grew around the millennial and in other cases the millennial gravitated to the big city. Bigger markets, yes – but it was a migration that involved the entire population of Canada.

Media consumption habits are very different.

This age cohort was raised at the bosom of online. It is no surprise that today's 18-34-year-old is a heavy user of the internet and a much lighter user of every other medium. Twenty years ago, 18-34-year-olds were average users of all legacy media.

Today's 18-34-year-olds drink a bit less beer and liquor, but have about the same level of car ownership than their 20-year-old counterparts.

They are less brand loyal and more price sensitive than 18-34-year-olds were back in 1996. But then aren't we all.

So, the next time a targeting guru or newspaper reporter uses the term “millennial,” think “Lilliputian.” The titles exist because authors have attributed imagined characteristics to both of these societies. ●

COMMENTARY

Combine one part advancing technologies, two parts disruptive, tech-savvy and overly connected millennial, and half part digital revolution, and unfortunately, you don't get a Long Island Iced Tea.

Keeping up with changing consumer behaviour and trends has resulted in tectonic shifts to the media landscape. Although different in so many ways – hockey vs. football, poutine vs. a Philly cheese steak, Tim Hortons vs. Starbucks, Celine vs. Mariah – both Canada and the U.S. are equally as affected by this change, and their ad spending is adjusting accordingly.

Gone are the days when news was simply delivered to us. Millennials seemingly possess an innate ability to

solve any cold case mystery. As such, they are more than capable of searching for their own content, specific to their interests. Breaking news is posted to their Instagram feeds; friends stay connected to one another, and to the world, via Facebook; and Twitter proves that a lot can be expressed in 140 characters or less. Content is being consumed more than ever, and through more channels than ever before.

So, what exactly are consumers choosing to consume? Only the most relevant, global and thought-provoking content available, of course! With more than 86 million followers, Selena Gomez is the most followed individual on Instagram. North of the border, Justin Bieber holds this title, with nearly 73 million followers. On television, Super Bowl XLIX drew over 114 million viewers, making it the most watched event in U.S. history. In the Great White North, the men's hockey gold medal game at the 2010 Winter Olympics was the most watched television broadcast, with 16.6 million Canadian viewers. These numbers not only show the reach and accessibility of media, but more importantly, prove that people are really interested in what Justin Bieber is doing and/or saying.

Remember when you had to wait a week for the next episode of your favourite TV show? With video-on-demand providers like CraveTV, HBO and Netflix, you can watch what you want, when you want to. Although these streaming services are extremely popular, with Netflix subscriptions hitting 46 million in 2016, television remains a staple in the American diet; roughly 86% of households with an internet-connected TV also have a pay TV package. This is good news for addressable TV,



Jeff Dack | President, Carat Canada

which is set to revolutionize TV advertising.

The rise of digital media, however, isn't good news for everyone. A continued decline in print readership,

in both Canada and the United States, is resulting in decreased print ad spending. Decreased print ad spending means less money is going into the pages of magazines like Vogue, which could mean a budget cut to Anna Wintour's reported \$200,000 USD annual clothing allowance, which means you may soon see Wintour at a clearance section near you!

Although the Canadian and U.S. markets differ, the changing media landscape in which they operate is the same. Like knowing the perfect angle for a selfie, understanding consumer trends and behaviour is critical, and will ensure your brand evolves with its customers and connects with them in the right place, at the right time. ●

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Consumption

DIGITAL USERS	2014	2015	2016	2017	2018
CANADA					
Internet Users (Millions)	28.3	28.9	29.5	30	30.4
Internet Users (% of population)	79.7%	80.3%	81.4%	81.6%	82.4%
Smartphone Users (% of population)	50.7%	56.6%	61.5%	64.9%	67.3%
Tablet Users (% of population)	40.0%	45.0%	48.0%	50.0%	51.5%
Smartphone Video Viewers (% of smartphone users)	51.2%	52.5%	53.0%	53.1%	53.9%
Digital Video Viewer Growth	4.8%	3.6%	2.7%	2.7%	2.1%
Digital Video Viewers (Millions)	21.2	21.9	22.5	23.1	23.6
US					
Internet Users (Millions)	253.7	260.8	267.4	273.3	278
Internet Users (% of population)	79.6%	81.2%	82.5%	83.7%	84.4%
Smartphone Users (% of population)	53.6%	59.3%	63.9%	67.3%	69.6%
Tablet Users (% of population)	46.9%	49.8%	51.9%	53.4%	54.6%
Smartphone Video Viewers (% of smartphone users)	72.4%	72.8%	72.9%	73.1%	73.6%
Digital Video Viewer Growth	5.5%	5.2%	3.9%	3.1%	2.6%
Digital Video Viewers (Millions)	196.9	207.1	215.1	221.8	227.5

MAGAZINE READERS	2014	2015	2016	2017	2018
CANADA					
Magazine reader growth	-3.4%	-3.2%	-4.3%	-3.5%	-3.3%
Magazine readers (millions)	17.2	16.6	15.9	15.3	14.8
Magazine readers (% of population)	60%	57%	54%	52%	50%
US					
Magazine reader growth	-5.3%	-3.5%	-2.6%	-1.5%	-1.3%
Magazine readers (millions)	107.9	104	101.4	99.9	98.6
Magazine readers (% of population)	44.0%	42.0%	40.5%	39.5%	38.6%

Source: eMarketer, Apr 2016; A18+ who read magazines at least once per month

NEWSPAPER READERS	2014	2015	2016	2017	2018
CANADA					
Newspaper reader growth	-3.8%	-3.2%	-2.4%	-2.3%	-2.5%
Newspaper readers (millions)	19.8	19.2	18.7	18.3	17.8
Newspaper readers (% of population)	69.2%	66.1%	64.0%	61.7%	59.8%
US					
Newspaper reader growth	-4.4%	-2.8%	-2.0%	-1.1%	-0.9%
Newspaper readers (millions)	127.5	123.9	121.4	120.1	119
Newspaper readers (% of population)	52.0%	50.0%	48.5%	47.5%	46.6%

Source: eMarketer, Apr 2016; A18+ who read newspapers at least once per month

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RADIO LISTENERS	2014	2015	2016	2017	2018
CANADA					
Radio Listener growth	0.6%	0.4%	0.1%	0.4%	-0.3%
Radio Listeners (millions)	25.6	25.7	25.7	25.8	25.7
Radio Listeners (% of population)	89.4%	88.6%	88.0%	87.2%	86.4%
US					
Radio Listener growth	0.6%	1.1%	0.9%	1.0%	1.0%
Radio Listeners (millions)	224.6	226.9	229	231.4	233.7
Radio Listeners (% of population)	91.6%	91.6%	91.5%	91.5%	91.5%
Source: eMarketer, Apr 2016; A18+ who listen to radio at least once per month; includes terrestrial AM/FM radio and satellite radio; excludes digital radio					

TV VIEWERS	2014	2015	2016	2017	2018
CANADA					
TV viewer growth	0.8%	0.7%	0.2%	0.7%	0.0%
TV viewers (Millions)	27.7	27.9	27.9	28.1	28.1
TV viewers (% of population)	96.8%	96.1%	95.6%	95.0%	94.4%
US					
TV viewer growth	0.1%	0.4%	0.5%	0.4%	0.3%
TV viewers (Millions)	235.4	236.4	237.5	238.4	239
TV viewers (% of population)	96.0%	95.4%	94.9%	94.3%	93.6%
Source: eMarketer, Apr 2016; A18+ who watch live or recorded video on a television set at least once per month; includes DVR and other prerecorded video (such as video downloaded from the internet but saved locally)					

COMBINED SPEND 2015	Canada	US	Source
TELEVISION			
TV ad spending (Billions)	\$2.60	\$68.88	Source Canada: eMarketer, Mar 2016; includes broadcast and cable TV; excludes digital; converted at the exchange rate of US\$1=C\$1.2785 Source US: eMarketer, Mar 2016; includes broadcast (network, spot and syndication) and cable TV; excludes digital
TV ad spending (% of total media ad spending)	26.5%	37.7%	
TV ad spending growth	2.0%	0.5%	
RADIO			
Radio ad Spending (Billions)	\$1.26	\$14.27	Source Canada: eMarketer, Mar 2016; excludes digital; converted at the exchange rate of US\$1=C\$1.2785 Source US: eMarketer, Mar 2016; excludes digital and off-air radio
Radio ad spending (% of total media ad spending)	12.6%	7.8%	
Radio ad spending growth	1.0%	-3.1%	
MAGAZINE			
Magazine ad spending (Billions)	\$0.4122	\$13.51	Source Canada: eMarketer, Mar 2016; includes B2B, consumer, local and Sunday; excludes digital; converted at the exchange rate of US\$1=C\$1.2785 Source US: eMarketer, Mar 2016; includes B2B, consumer, local and Sunday; excludes digital
Magazine ad spending (% of total media ad spending)	4.0%	7.4%	
Magazine ad spending growth	-7.0%	-7.0%	
NEWSPAPER			
Newspaper ad spending (Billions)	\$1.70	\$14.65	Source Canada: eMarketer, Mar 2016; includes classified, local, national & retail; excludes digital; converted at the exchange rate of US\$1=C\$1.2785 Source US: eMarketer, Mar 2016; includes classified, local, national & retail; excludes digital; eMarketer benchmarks its US out-of-home ad spending projections against Outdoor Advertising Association of America (OAAA) data, for which the last full year measured was 2014
Newspaper ad spending (% of total media ad spending)	17.0%	8.0%	
Newspaper ad spending growth	-6.0%	-8.0%	
OUT-OF-HOME			
Out-of-home ad spending (Billions)	\$0.5864	\$7.31	Source Canada: eMarketer, Mar 2016; includes alternative, billboards, cinema, street furniture and transit; converted at the exchange rate of US\$1=C\$1.2785 Source US: eMarketer, Mar 2016; includes alternative, billboards, cinema, street furniture and transit; eMarketer benchmarks its out-of-home ad spending for the US against the Outdoor Advertising Association of America (OAAA) data for which the last full year measured was 2014
Out-of-home ad spending (% of total media ad spending)	5.8%	4.0%	
Out-of-home ad spending growth	5.0%	3.9%	

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COMBINED SPEND 2015	Canada	US
TV		
TV ad spending (Billions)	2.6	68.88
TV ad spending (% of total media ad spending)	26.5%	37.7%
TV ad spending growth	2.0%	0.5%
RADIO		
Radio ad Spending (Billions)	\$1.26	\$14.27
Radio ad spending (% of total media ad spending)	12.6%	7.8%
Radio ad spending growth	1.0%	-3.1%
MAGAZINE		
Magazine ad spending (Billions)	\$0.4122	\$13.51
Magazine ad spending (% of total media a spending)	4.0%	7.4%
Magazine ad spending growth	-7.0%	-7.0%
NEWSPAPER		
Newspaper ad spending (Billions)	\$1.70	\$14.65
Newspaper ad spending (% of total media ad spending)	17.0%	8.0%
Newspaper ad spending growth	-6.0%	-8.0%
OUT-OF-HOME		
Out-of-home ad spending (Billions)	\$0.5864	\$7.31
Out-of-home ad spending (% of total media ad spending)	5.8%	4.0%
Out-of-home ad spending growth	5.0%	3.9%
DIGITAL AD		
Digital Ad Spending (billions)	\$3.4	\$59.8
Digital Ad Spending (% of total media ad spending)	34.5%	32.7%
Digital Ad Spending Growth	15.0%	20.4%

MAGAZINE AD SPENDING	2014	2015	2016	2017	2018
CANADA					
Magazine ad spending (millions)	\$443.30	\$412.20	\$404.00	\$395.90	\$392.00
Magazine ad spending (% of total media a spending)	4.6%	4.0%	3.9%	3.7%	3.6%
Magazine ad spending growth	-15.4%	-7.0%	-2.0%	-2.0%	-1.0%
US					
Magazine ad spending (billions)	\$14.53	\$13.51	\$12.97	\$12.84	\$12.90
Magazine ad spending (% of total media a spending)	8.3%	7.4%	6.8%	6.4%	6.1%
Magazine ad spending growth	-4.0%	-7.0%	-4.0%	-1.0%	0.5%
Source Canada: eMarketer, Mar 2016; includes B2B, consumer, local and Sunday; excludes digital; converted at the exchange rate of US\$1=C\$1.2785 Source US: eMarketer, Mar 2016; includes B2B, consumer, local and Sunday; excludes digital					

NEWSPAPER AD SPENDING	2014	2015	2016	2017	2018
CANADA					
Newspaper ad spending (Billions)	\$1.81	\$1.70	\$1.62	\$1.55	\$1.51
Newspaper ad spending (% of total media ad spending)	18.1%	17.0%	15.6%	14.5%	13.7%
Newspaper ad spending growth	-13.4%	-6.0%	-5.0%	-4.0%	-3.0%
US					
Newspaper ad spending (Billions)	\$15.92	\$14.65	\$13.77	\$13.22	\$12.95
Newspaper ad spending (% of total media ad spending)	9.1%	8.0%	7.2%	6.6%	6.1%
Newspaper ad spending growth	-8.0%	-8.0%	-6.0%	-4.0%	-2.0%
Source Canada: eMarketer, Mar 2016; includes classified, local, national & retail; excludes digital; converted at the exchange rate of US\$1=C\$1.2785 Source US: eMarketer, Mar 2016; includes classified, local, national & retail; excludes digital; eMarketer benchmarks its US out-of-home ad spending projections against Outdoor Advertising Association of America (OAAA) data, for which the last full year measured was 2014					

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OUT-OF-HOME AD SPENDING	2014	2015	2016	2017	2018
CANADA					
Out-of-home ad spending (Millions)	\$558.50	\$586.40	\$604.00	\$622.10	\$634.50
Out-of-home ad spending (% of total media ad spending)	5.8%	5.8%	5.8%	5.8%	5.8%
Out-of-home ad spending growth	2.0%	5.0%	3.0%	3.0%	2.0%
US					
Out-of-home ad spending (billions)	\$7.04	\$7.31	\$7.50	\$7.65	\$7.76
Out-of-home ad spending (% of total media ad spending)	4.0%	4.0%	3.9%	3.8%	3.7%
Out-of-home ad spending growth	1.1%	3.9%	2.6%	2.0%	1.5%

Source Canada: eMarketer, Mar 2016; includes alternative, billboards, cinema, street furniture and transit; converted at the exchange rate of US\$1=C\$1.2785
Source US: eMarketer, Mar 2016; includes alternative, billboards, cinema, street furniture and transit; eMarketer benchmarks its out-of-home ad spending for the US against the Outdoor Advertising Association of America (OAAA) data for which the last full year measured was 2014

DIGITAL AD SPENDING	2014	2015	2016	2017	2018
CANADA					
Digital Ad Spending (billions)	\$3.0	\$3.4	\$3.8	\$4.1	\$4.4
Digital Ad Spending (% of total media ad spending)	30.8%	34.5%	36.8%	38.9%	40.8%
Digital Ad Spending Growth	11.0%	15.0%	10.0%	9.0%	8.0%
US					
Digital Ad Spending (billions)	\$49.7	\$59.8	\$72.1	\$82.9	\$93.2
Digital Ad Spending (% of total media ad spending)	28.3%	32.7%	36.8%	40.0%	42.5%
Digital Ad Spending Growth	15.5%	20.4%	20.5%	14.9%	12.5%

*Includes advertising that appears on desktop and laptop computers as well as mobile phones and tablets, and includes all the various formats of advertising on those platforms; includes SMS, MMS and P2P messaging-based advertising; eMarketer benchmarks its Canada digital ad spending projections against the IAB Canada, for which the last full year measured was 2014

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Digital? Really?

Are we still using that term in the context of media?

This may seem to be an odd way to start the commentary on the digital section, but it is time to eradicate the word digital because it is now meaningless and confusing.

When “the Internet” started, it provided a unique opportunity to employ metrics enabled by digital, thus the initial focus on digital and the necessity to have a new specialized set of resources. However, since 2000, when Google began selling ads associated with search keywords, the media landscape has evolved to be functionally digital across all channels.

Digital, as a discipline, was important to treat as a unique and separate function in the early days. There were new metrics, new mistakes to learn from, a different planning set, new talent, and entirely new currencies

to evolve towards. As years passed, more and more mediums became connected to broadband and the methodologies and principles used for digital have become central to all planning.

However, with everything having moved or moving to digital, where digital planning and delivery belongs at our core, there are still some antiquated nomenclature and digital function separation. That needs to change. We cannot operate in a two-tiered world with digital job titles, digital-only media agencies and digital ad revenue—it is a divide that is irrelevant and dangerous.

With the unifying of channel-strategy and cross-functional planning, there is a great hope that emerges. That hope is the return to focus on great ideas. For years, we’ve been focusing on how things work and explaining and over-articulating the mechanics of new media channels.



We’ve lost track of the focus on ideas as an industry. Participation in a new channel isn’t innovation. An idea or set of ideas that can be applied and flourish in the new media landscape is what actually matters.

New media applications and hyper-targeting capabilities are irrelevant without an idea to power them. If you think back to some of the most successful marketing campaigns—Dove Real Beauty, Apple Get a Mac, Old Spice: The Man Your Man Could Smell Like,

McDonald’s Our Food Your Questions—they were all successful based on strong consumer insights and the resulting creative ideas. Those are all great examples of how to function in today’s media reality. There should be and will be more of those as we look backwards, acknowledge what we’ve learned, and then embrace a new set of operating principles.

So let’s lose the differentiated language and universally embrace ideas powered and managed against data and the ever-transparent voice of the Canadian public. ●

Canadians' inexorable adoption of advancing technology has created many opportunities for marketers to connect their brands to consumers' lifestyles and needs. The communication goal of "right message, right person, right time" is perhaps closer than ever.

However, the sheer volume and variety of choices available to advertisers has presented its own set of challenges. Things are more measurable, but now we need to think about what measurement is meaningful. There's more data about consumers, but determining the quality, relevance and value of that data, and how to properly make use of it, is often a daunting proposition. There's risk in digital marketing: misuse of data can lead to headline news, or worse, a list of customers exasperated with targeting and over-frequency.

Bad digital advertising experiences have had a profound impact on the way consumers view digital ads. Consumers who encounter ads that block content, mislead them, or present the threat of malware are making the decision to block ads altogether a concerning prospect for both advertisers who want to reach consumers and the publishers who depend on ad revenue to survive. Digital media can provide great ad experiences, but there must be a concerted effort to build out a customer-centric communications strategy that doesn't rely exclusively on annoyance.



Making good choices now requires a holistic view of all channels, as well as an understanding of how they might work together, and how they might be measured separately. The rueful CTR metric has almost entirely given way to more considered options. Tactics designed to drive the brand might focus on effective delivery, viewability, engagement and frequency, while performance-based initiatives focus on actual conversions, sales and ROI metrics.

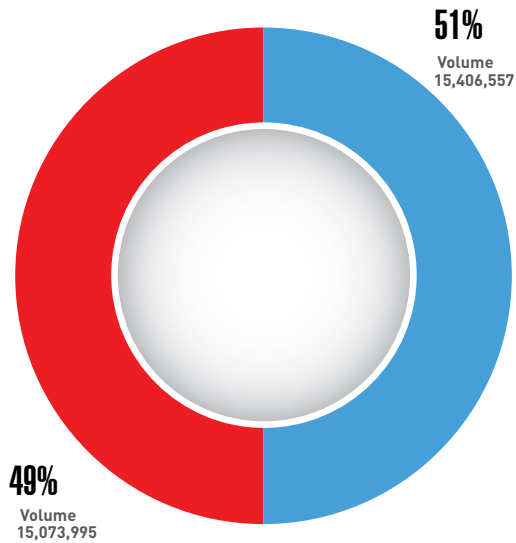
Digital media, as an advertising channel, has been around long enough to have shed the descriptor of "new media," but it continues to evolve: the digital media of 2016 looks vastly different than the landscape of 2011. Between smartphone adoption, streaming services, Snapchat and Pokémon Go, marketers will continue to be challenged to develop the deepest understanding of their consumer, their assets, and the opportunities presented within the digital realm. ●

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Contributed by Sean Dixon,
Director, Emerging Media, OMD

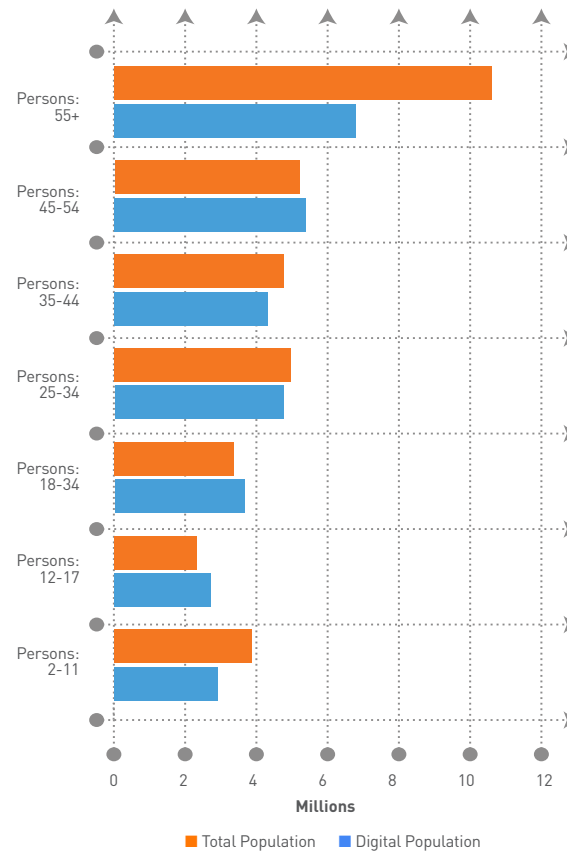
Total Digital Population

■ All Male ■ All Female



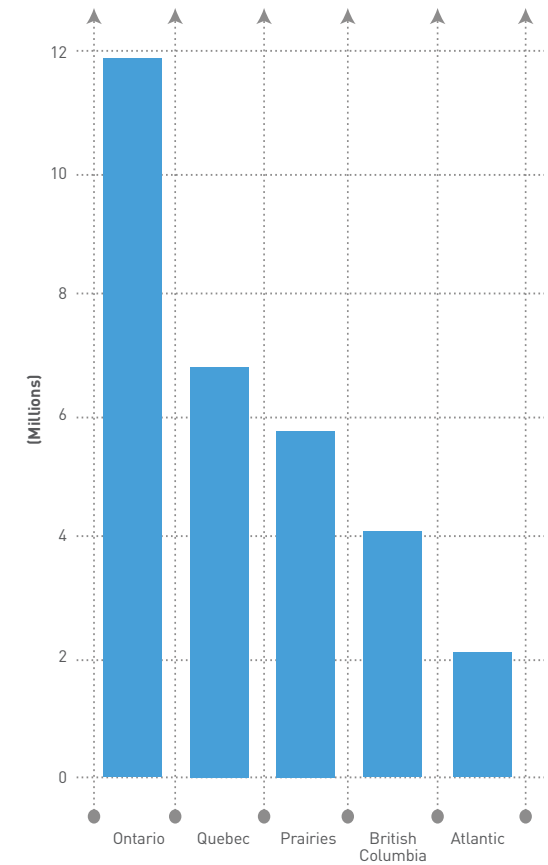
Source: ComScore Demographic Profile,
Total Population, Multiplatform, June 2016

Digital Population vs. Canadian Population



ComScore Demographic Profile, Total Population, Multiplatform, June 2016
*Digital population counts do not include estimates for audiences under 18
Source: Statistics Canada.

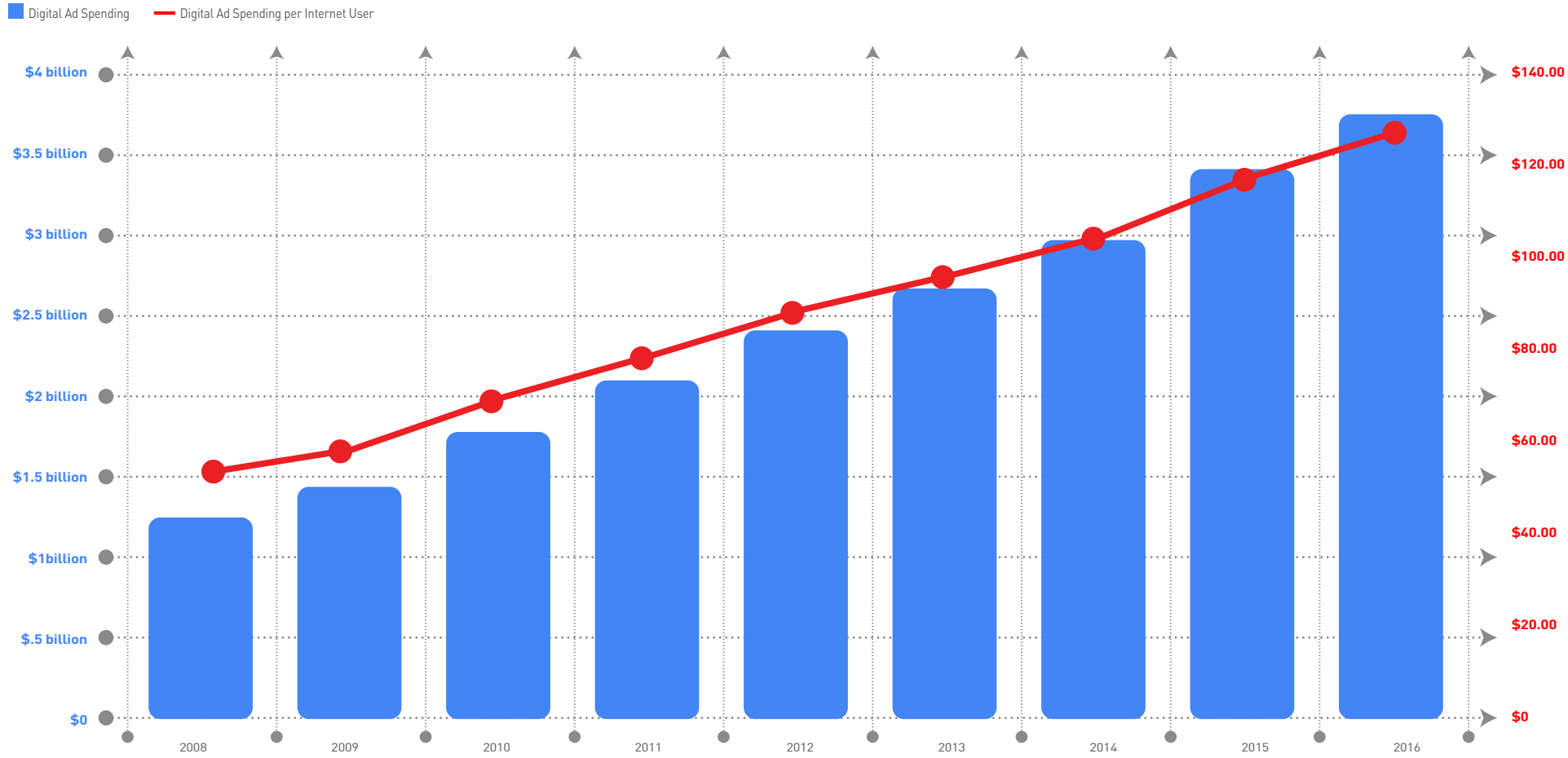
Digital Audience By Region



Source: ComScore Demographic Profile,
Total Population, Multiplatform, June 2016

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Digital Ad Spend and Spend per User, 2008 — present



Source: Emarketer, "Digital Ad Spending, Canada, 2008-2020"

In 2006, as mobile phone owners motored along with our flip phones, inefficiently typing on numeric keypads and trying to get a high score in Tetris, few would've predicted that less than a decade later, the majority of Canadians would carry the world's information in their pockets and feel naked if they left the house without it.

Much has changed since the start of wide mobile adoption. Long gone are the days where the only light source at a campfire was the fire itself, or discussions about that actor who was in that one movie ended with "I don't know." We're in an era of mass yet personalized communication, spreading knowledge and opinion faster than ever before.

Smartphone penetration continues to increase year over year in Canada with a projected 61.5% of the total population owning one by the end of 2016. Within the same period, positive growth in time spent per day increasing to an average of almost 2.5 hours should not go unnoticed. So what are smartphone users doing during this time over the course of a day?

To no surprise, social media dominates mobile time spent, with 61.7% of smartphone owners using social platforms on mobile, which makes up 88% of social network users in Canada. Further, growth in users consuming video on mobile (8.4% over 2015) is outpacing the growth in overall digital video user penetration (2.7%), indicating an increasing number of connected Canadians are taking advantage of the convenience of content on the go. Search will maintain its majority share in mobile ad spend through 2016 (51% of total mobile ad spend) and continues to inch higher as a percentage of total search spend, trending towards 47% by year's end.



With the current upward trend for mobile penetration layered with increases in video viewing and social media usage, it's increasingly important for marketers to understand the implications for their brands, and take action on emerging developments that continue to create challenges and opportunities in the marketplace.

A shift will become apparent in the development of better mobile creative. It goes without saying that there's nothing overtly sexy about mobile banners. Though no one will argue the value of the right message displayed at the right time to the right person, the shift will be driven by the thirst for a greater canvas and the ability to tell better brand stories. Whether it be more engaging ad units, progressively better site design allowing for richer advertising without sacrificing authenticity, or an emphasis on customized and integrated content driven by what mobile users are consuming the most, advertisers will explore ways to better provide value to consumers on their devices.

However, not every initiative is focused on telling better brand stories. As ecommerce solutions make consumers' lives more convenient, DR needs will play a pivotal role for businesses. The challenge remains that mobile poses a particular issue for attribution. The inclination for Facebook and Google to maintain their walled gardens has brought players like Amazon into the market, all of which maintain siloed data that in theory would be

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incredibly powerful for advertisers to track users across platforms and systems, but don't.

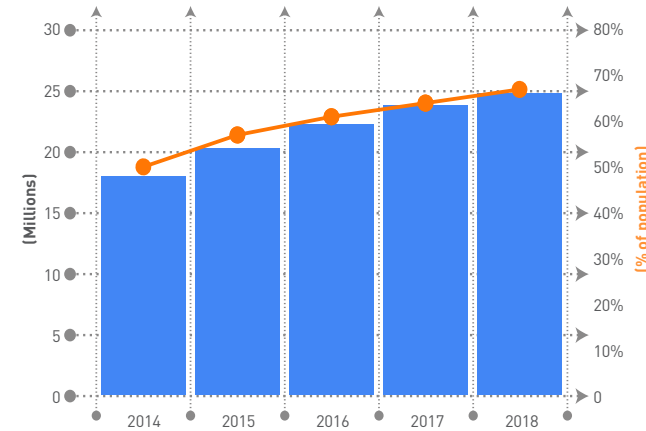
Verizon purchasing AOL and Rogers building media capabilities further illustrates the power that unique identifiers can carry in the media mix. Knowing who consumers interact with the most digitally, where they've been in the last seven days, and what their online purchase behaviours can predict are all powerful attributes that make the above platforms excel. The challenge for marketers is, how do we connect the dots?

Apple Pay inking deals with the big banks this year is the first sign of lowering the barriers of entry for consumers to take part in the Internet of things. Consumers will continue to crave convenience and mobile will have a huge role in facilitating. A recent survey by Norton by Symantec found that 60% of Canadian respondents use their smartphones to control other devices.

As the barriers lower and allow traditionally non-early adopters or tech-savvy consumers to feel the effect of the Internet of things, growth potential is infinite, leaving undiscovered opportunity for marketers to help simplify and streamline the mundane. ●

Smartphone Users in Canada

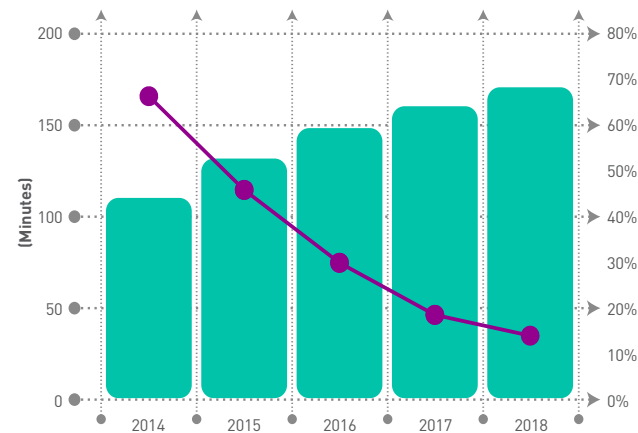
■ Mobile phone social network users (millions)
— Smartphone users (% of population)



Source: eMarketer, June 2016

Time Spent with Mobile, Canada, 2014–2018

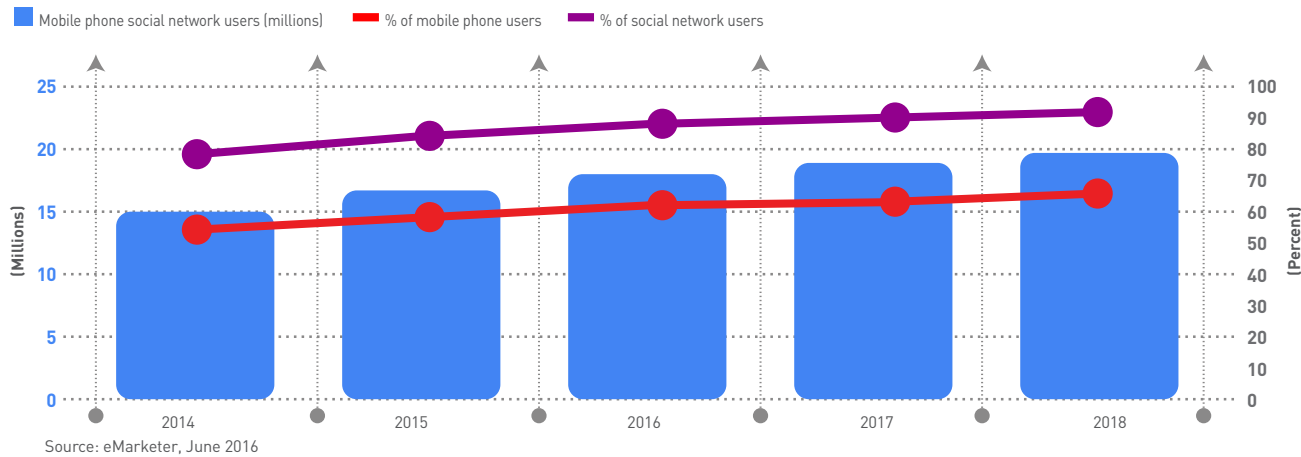
■ Mobile (nonvoice): time spent per day (Minutes)
— Mobile (nonvoice): growth in time spent per day



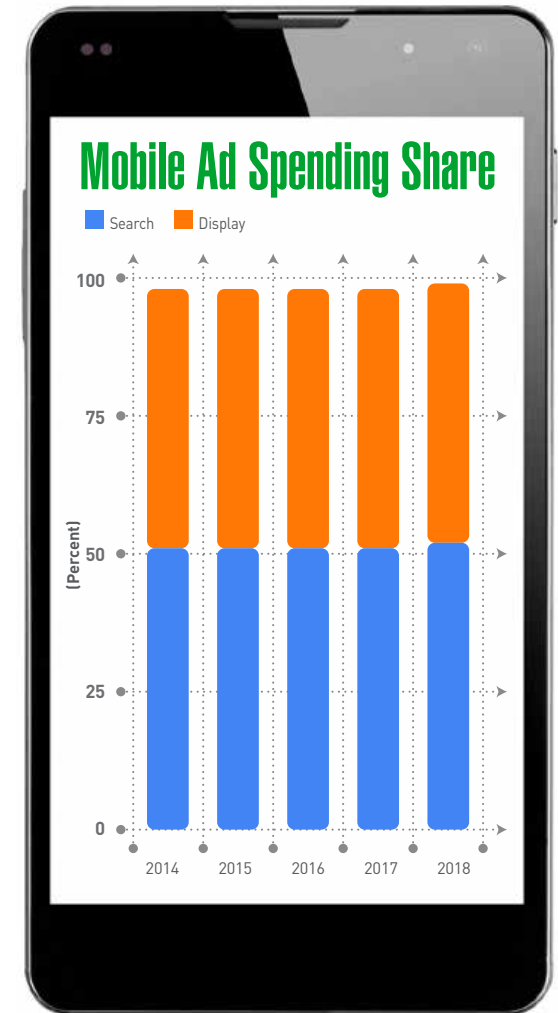
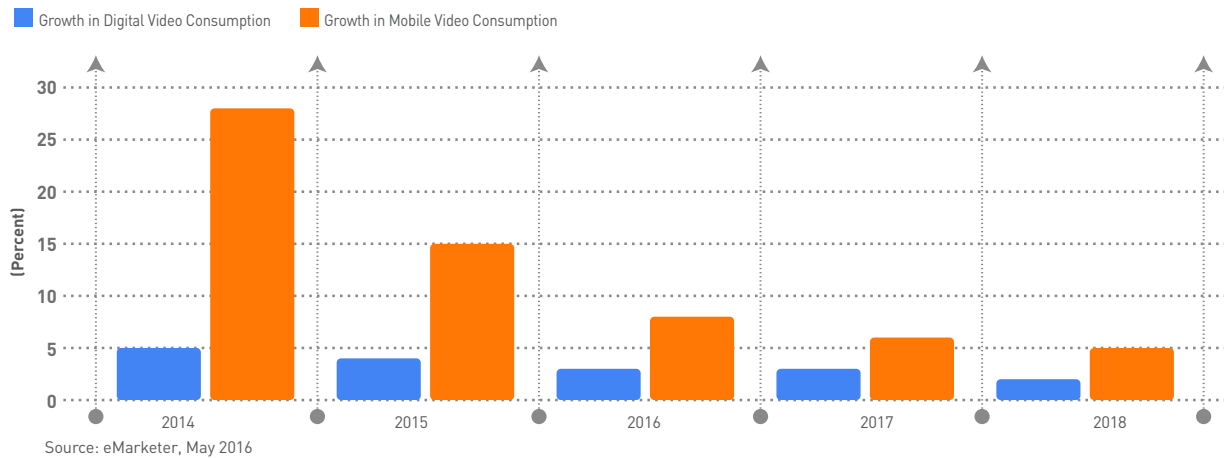
Source: eMarketer, May 2016

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Mobile Phone Social Network Penetration



Video Growth — Overall Digital vs. Mobile



Every boardroom at every Canadian advertiser and agency is a din of social platform speculation and planning considerations. There are only a handful of publishers and tech companies that are included in the “what is our _____ strategy?”

Facebook/Instagram, Snapchat, Twitter, Pinterest, and LinkedIn, at different degrees, are filling in the blank in that conversation—a conversation that is nearly exclusive to companies in the category of social.

There is good reason for this. There is no larger audience pool in the world or in Canada than those that exist within these platforms. Facebook alone has more than 25 million users in this country. As the audiences have scaled, the advertising products are integrating a lot more natively into users’ feeds. In addition to the creative execution becoming more integrated, an advertiser’s ability to reach audiences by demographic considerations, interests, device, location, and more allows messaging control to be scaled up.

However, despite this growth and advertising experience improvement, Canadian advertisers are underinvested in social. The dollars invested in the category are a huge contradiction from the airtime the category gets in planning sessions and closed-door, strategy overhauls.

Mistaking participation for the proper and required investment is a common root cause. The reality is most major social platforms are public or are poised to go public. Organic reach has been nearly negated in order



to promote revenue-driving investment. Advertising and marketing planning needs to shift to be driven by two realities as it relates to social.

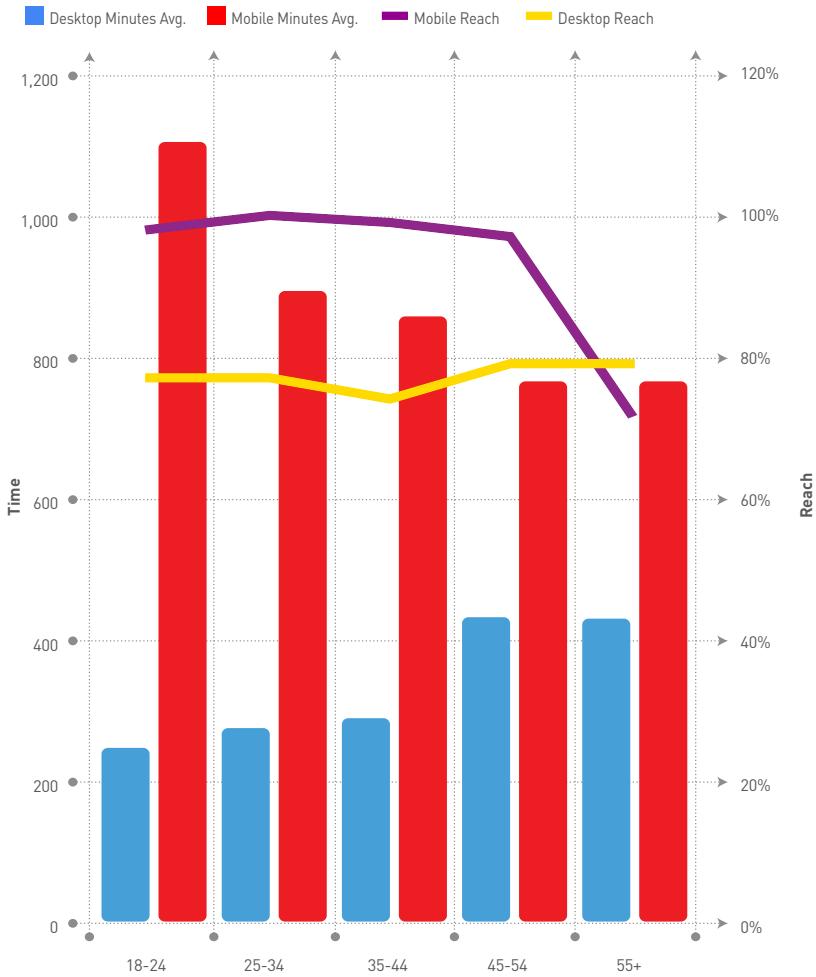
Firstly, new creative planning and advertising formats are mandatory. Advertising experiences have evolved to be more directly integrated into each platform’s experience. This needs to be embraced and designed for, rather than avoided and ignored.

Secondly, social is not free and it’s not merely a low-cost reach vehicle. It’s deserving of its own major budgeting process that is managed daily and diligently with as much rigor as search or programmatic.

With social video products scaling to rival or surpass YouTube, 2017 will see an even larger pull of dollars towards these channels. Tough decisions will need to be made as to where to draw dollars from. It won’t be easy, but it’s time to move. One thing is clear: social is not a niche channel. It’s as mass as mass channels get. ●

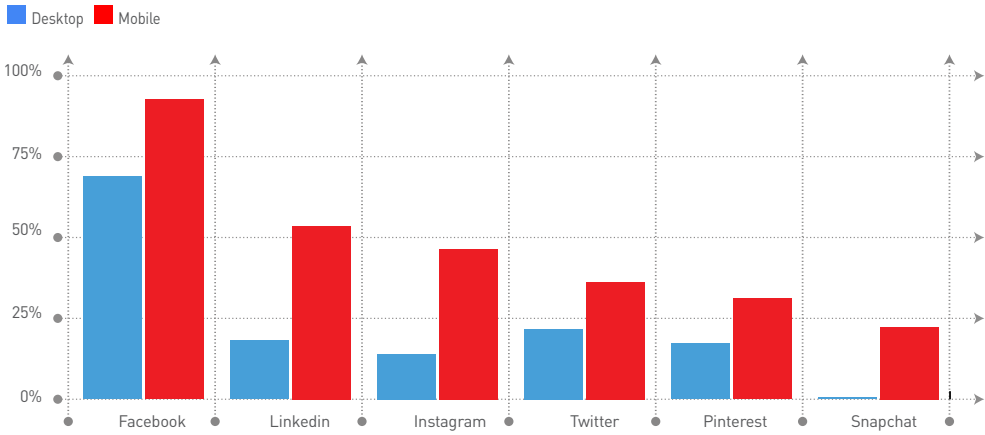
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Time and Reach of Facebook, Mobile vs. Desktop by Demo



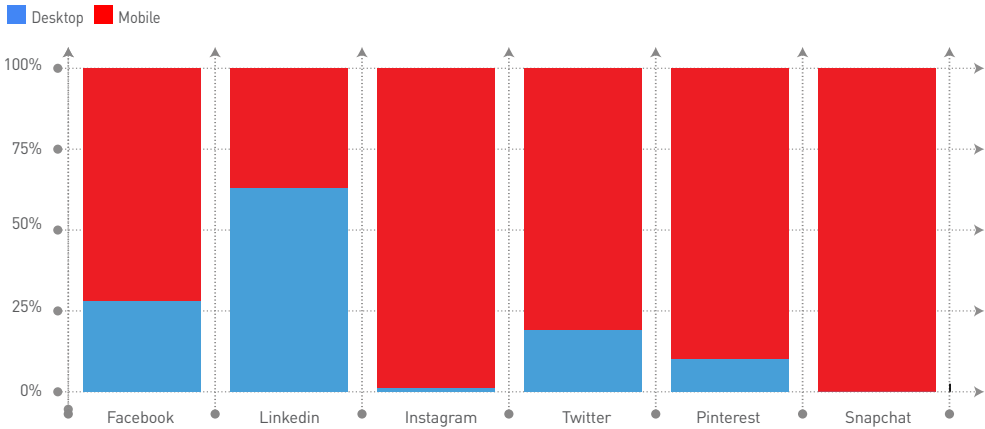
Source: Comscore, Demographic Profile, July 2016

Social Platform Reach by Device



Source: ComScore Media Metrix, Demographic Profile, Total Canada Multiplatform, July 2016

Minutes Per Device by Platform

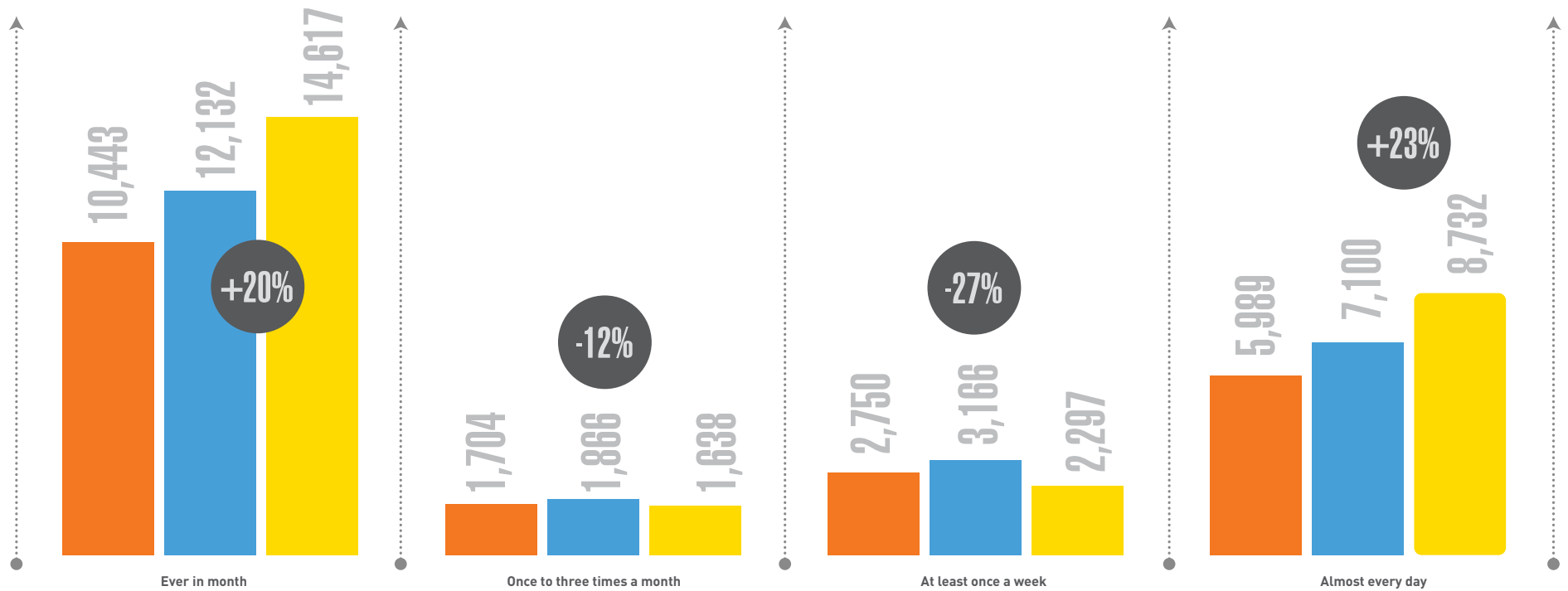


Source: ComScore Media Metrix, Key Measures, Total Canada Multiplatform, July 2016

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Social Networking Habits of Smartphone Subscribers (000)

December 2013 December 2014 June 2016 % Change



Source: ComScore MobilenS, June 2016, December 2013, December 2014

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Starting as an efficiency play across remnant inventory, programmatic has moved from the edge to the core of digital media buying.

Accounting for 21% of the total digital media buy last year, programmatic is expected to consume 36% of the total digital media buy in 2017, quickly gaining traction for how it leverages data and simplifies the buying process (Source: eMarketer). In addition to these early phase benefits, the next stages of programmatic will access more premium inventory and will be bought on an audience guarantee, rather than by impression. This will usher in a new era for digital media, and marketers will begin to see more and bigger media bought through programmatic.

Access to Quality Inventory

In 2015, advertisers leveraged private marketplaces as a way to buy more premium inventory (comparative to the open exchange). Although a giant leap for the industry, these private marketplaces were still lower quality than what could be accessed through direct buys. Now, in 2016,



we can access inventory that guarantees price and placement commitments while transacting through data-driven decision-making. This shifts more control to advertisers on premium inventory, previously dictated by the publishers using their own data and technology.

The Rise of the Walled Gardens

Walled gardens are drastically shifting the industry landscape, and the remodel has just begun. Because Google, Facebook, AOL/Verizon, and Amazon have tremendous user bases across their devices, each can tout not only extensive global reach, but cross-device capabilities. More importantly, the big four gardens have unique self-declared and intent data, and owned and operated inventory that can only be accessed through their platforms. The walled garden dilemma for brands is important because the future of addressable, 1:1 communication with consumers, and the shift from impressions to audience as a currency for media transaction, is brewing within these walls.

Enhancing the User Experience

A 2016 study by IAB Canada found that one in six Canadians uses ad blockers to limit ads served to them online. The most frequently cited reason for ad blocking

is intrusive ad formats that contribute to visual clutter, according to iOS ad blocker Crystal. People don't hate ads; they hate being interrupted. But with inexpensive CPMs, and below par third-party data, advertisers have taken a "more is more" approach with serving banner ads. This has resulted in interruptive formats, harming the user experience and tarnishing brand impact. The remedy is contextually relevant, non-invasive formats (such as native) that contribute to the online experience, rather than detract from it.

From Big Media to Better Media

Programmatic has made waves beyond digital media, and we are seeing its impact surface in radio, out of home, print, and even television. Although still developing, data-driven decision-making and automation are reshaping industries whose buying methodologies have been unchanged for decades. Nascent today, these media will continue to develop this smarter way of buying.

Yesterday, marketers incorporated programmatic on the media plan for added efficiency. Today, marketers recognize the importance of programmatic to transact on display and video across mobile and desktop devices. But technology innovation is changing more than just the way we buy digital, and tomorrow, marketers will need to be fluent in programmatic, as it will span across all of their digital and traditional media. ●

The Programmatic Landscape

DEMAND

Trading Desks

The Aber Group
Accuen
Amnet
Cadreon
Chameleon
District M
EyeReturn Marketing
Exchange Lab
Ideon Media
Magnet Intell
Mediative
Noise
Sizmek
Xaxis
Xpeto

DSPs

Acuity
Adconion Direct
Addictive Mobility
Adgear
AdLearn Open Platform
AppNexus
BrightRoll
Chango
DoubleClick Bid
Manager by Google
E Ads
EyeReturn Marketing
Magnetic
MediaMath
Rocket Fuel
SiteScout
SourceKnowledge
Swarm
Tube Mogul

SUPPLY

SSPs/Programmatic Direct

DoubleClick Ad Exchange
by Google
Index Exchange
MarketPlace
by AdTech
Nectar powered by
Juice Mobile

Exchanges

AppNexus
Canadian Programmatic
Marketplace
Cpax
District M
DoubleClick Ad Exchange
by Google
Index Exchange
Mediative
Microsoft Advertising
Exchange
Opx
Redux Media Exchange
Yahoo Ad Exchange

Publishers

Aol
CBC Radio-Canada
Corus Entertainment
La Presse
Microsoft Advertising
Postmedia
Quebecor Media
Rogers Media
Shaw
TC Media
The Chronicle Herald
The Globe And Mail
The Huffington Post
The Star
Yahoo Canada
Yellow Pages Group

Networks

Advertising.com
Fuel
Google Display Network
Olive Media
MediaNet
Mediative
Redux Media
Rogers One Call
Suite 66
TC Media
Tribal Fusion
Yahoo Advertising

DATA

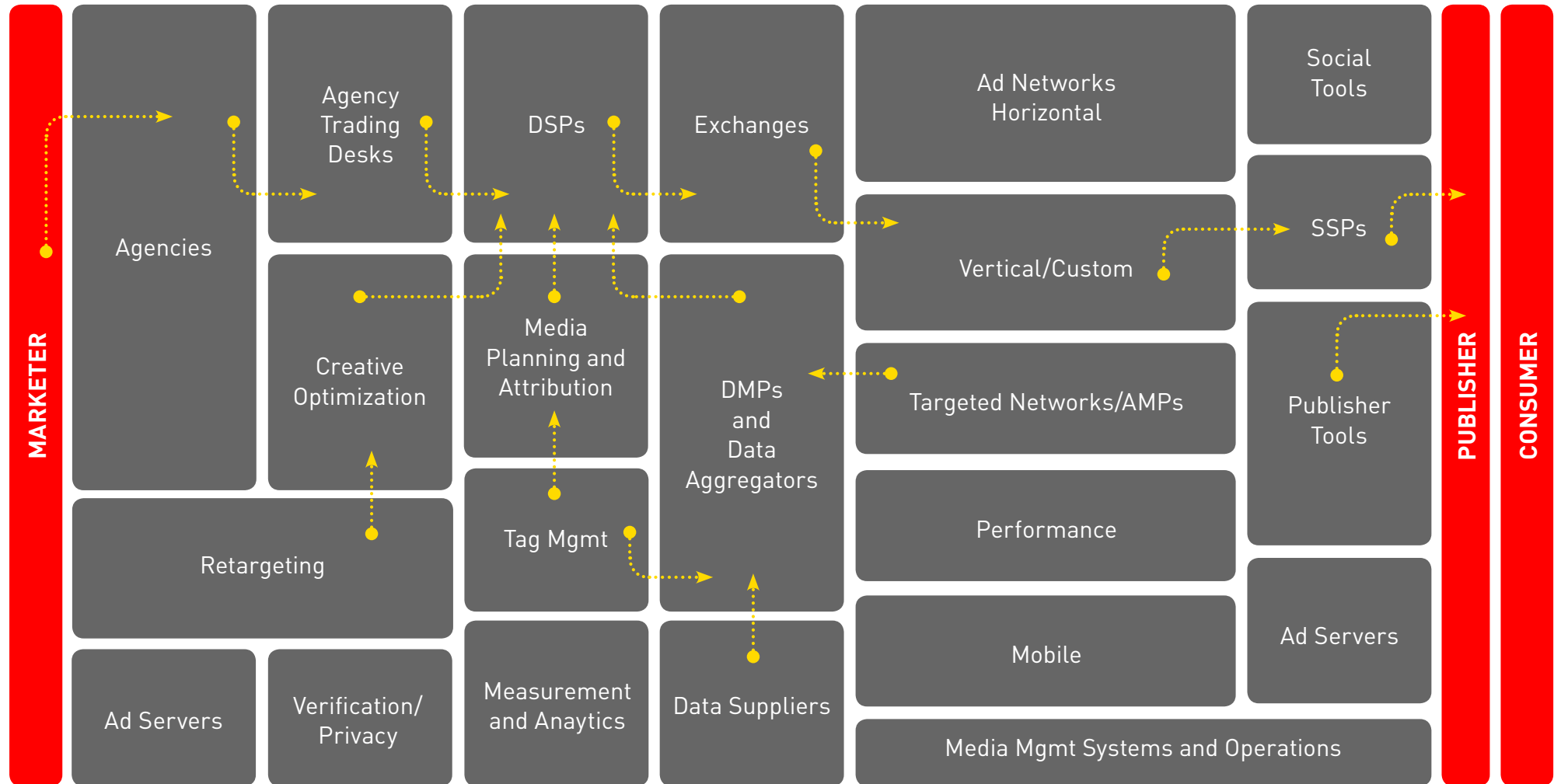
DMPs/Data Suppliers

Acuity
Akamai
Bizo
BlueKai
Criteo
District M
Dg Peer 39
Exelate
EyeReturn Marketing
KruX
Lotame
Makazi
Neustar
Project Sunblock
Teradata

Delivery Verification

EyeReturn Marketing
Ghostery Enterprises
Sizmek

The Programmatic Landscape. A Comprehensive Layout of the Marketplace.



TERM	DEFINITION
Ad Exchange	A virtual marketplace where participating suppliers auction their impressions to eligible buyers. The ad exchange announces each impressions, in real time, and asks buyers if they are interested to buy said impression and at which price.
Ad Server	Technology that stores display advertisements, delivers them to website visitors in a way that would maximize the Advertiser's (or Publisher's) revenue, monitor campaigns and create reports.
Ad Verification	A service that confirms if an ad ran only where it was intended to by the Advertiser. Often used to ensure brand safety, so that an ad does not appear in an inappropriate place or site.
Agency Trading Desk (ATD)	A department or arm of an Agency that oversees programmatic buying. Many Agency holding companies have trading desks.
Aggregated Information	Data combined from many individual users that can't identify anyone personally.
Anonymous Information	Facts that don't identify a person specifically, such as age group and gender.
Application Programming Interface (API)	Set of rules and specifications that software programs can follow to communicate with each other.
Attribute	A single piece of information known about a user and stored in a behavioral profile which may be used to match ad content to users. Attributes consist of demographic information (age, gender, geographical location), segment or cluster information (auto enthusiast), and retargeting information (visited Site X two days ago).
Attribution Modelling	A mathematical process for linking marketing activities to outcomes such as online or offline product purchases. Attribution modeling typically analyzes the degree to which different blends of media exposure, across different channels, generate different bottom-line results in order to establish causality and properly credit each media channel for its impact on the final outcome. For example, users exposed to \$100K of display media only may generate 1,000 conversions that can be directly attributed to the display campaign, but also generate a measurable lift in searches and in offline sales that lead to further impact.
Audience Intelligence (AI)	The use of 1st and 3rd party data to determine an Advertiser's audience.
Behavioural Data (BT, Audience Targeting)	Data related to specific users as well as their historical patterns of interaction with websites and advertising content
Blacklist	A list of web sites that an Advertiser will not permit their ads to be placed on. These sites are often sites for tobacco, pornography, or other content that is not aligned with the brand image of the Advertiser.
Brand Safety	Contextual technology aimed at ensuring advertisement does not display on webpages where its appearance might negatively impact the Advertiser's brand.
Contextual Data	Data related to the content and context of the specific webpage where advertisement is run.
Contextual Advertising (or Targeting)	Advertising on a web site that is targeted to the specific individual who is visiting the website. Natural context places an ad on a relevant site, such as a bank ad on a finance page. Contextual advertising scans the text of a website for keywords and targets ads based on those keywords. These ads can be text or images.

TERM	DEFINITION
Cookie Caching	A process of collecting cookies of various users which can be brought on an ad exchange.
Cookie, first-party	A cookie placed on a website by the owner, such as those on a bank site or other site (Netflix, Amazon) so they recognize users when users return to their sites.
Cookie, third-party	A cookie placed on a website by a third-party, such as an ad server or data provider. Information from these cookies is collected and can be used to place you in one or more demographic groups, based on your online activity. These cookies can be used to target advertising and manage campaign aspects.
Data Management Platform (DMP)	A centralized system for gathering first-party data, integrating with third-party data, and applying this data to one's advertising strategy. Advanced DMPs offer users the ability to create custom segments, forecast segment volumes, sync segments with other sources, overlay advanced analytics, and are often integrated with or part of DSP platforms.
Demand Side Platform (DSP)	A DSP is a technology platform through which buyers (Advertisers or Agencies) can plan, target, execute, optimize, and analyze digital media buying programs across 100% of the media plan. Through a DSP, the buyer can set targeting criteria, pricing, frequency, and other criteria governing the purchase of digital ad units. Advanced DSPs will provide additional capabilities to the buyer, including integration of various online and offline data sources, the ability to provision direct media buys (as opposed to just Programmatic), advanced optimization and decisioning capabilities, and creative tools.
Dynamic Ad Insertion	The process by which an ad is inserted into a page in response to a user's request. Dynamic ad placement allows alteration of specific ads placed on a page based on any data available about the user and from that campaign. At its simplest, dynamic ad placement allows for multiple ads to be rotated through one or more spaces, served by a template creative. For example, Best Buy may show a DVD player to one user, and an iPod to another user, using the same ad creative and ad tag. Programmatic benefits are strengthened when the ad speaks closely to what the user shows interest in.
Dynamic Pricing	The purchase price for an ad impression that is determined via a real-time auction rather than a predetermined fixed rate.
Dynamic CPM (dCPM)	The approach to winning ad traffic by increasing CPM bid by the necessary minimum in real time to outbid competition.
First Look	"First look" is a tactic widely offered by sellers who offer prioritized access to select Advertisers within an open market environment. Instead of the winning impression going to the highest bid, "first look" affords first right of refusal for an impression within an exchange based on a pre-negotiated floor or fixed price. If the buyer bids, they are guaranteed to win the impression. This privilege is typically granted in return for a commitment.
Frequency Capping	The ability to set a limit on the number of times an Advertiser exposes a user to their advertising within a fixed time period.
Independent Trading Desk (ITD)	A third party company that licenses and supports DSP technology to act as a trading desk for Advertisers/Agencies.
Long Tail Publishers	Small, sub-scale ad Publishers such as blogs to niche commercial sites.

TERM	DEFINITION
Look-alikes / Audience Modelling	Potential customers modeled after an Advertiser's 1st party data (usually data from their customers who visit and make purchases from their websites). Attributes of the Advertiser's customers are matched against a larger audience, creating a pool of highly targetable and 'pre-qualified' users. Some companies refer to this also as 'pre-targeting'.
Non-Remnant Inventory	Inventory sold directly by a Publisher to an advertiser. Remnant inventory is usually sold by a third party.
Pixels (Tags, Beacons)	1x1 pixel tags on many websites that can track web surfers' location and activities online, such as a registration or conversion. Some are powerful enough to know what a user types on a particular site.
Private Exchange	A virtual marketplace operated by sellers to represent their high value/premium inventory, providing programmatic access to select buyers (via a DSP) who agree to transact based on pre-negotiated terms (e.g. flight dates, floor prices, auction types, budgets, etc.). True private exchanges offer access to inventory that is not otherwise available within the open market.
Programmatic - Bidder	Connects to one or more "pipes" and evaluates every impression that's announced. The real-time bidder is responsible for making the best inventory acquisition decisions possible, on behalf of the Advertiser.

TERM	DEFINITION
Programmatic - Pipe (API)	Provides a server-side connection into an inventory source and pushes impressions, in real time, to eligible buyers. It announces impressions as they are made available to buy.
Real Time Bidding (Programmatic)	A data-driven programmatic buying model allowing Advertisers or their Agencies to bid on digital media (display, video, mobile, social, etc.) in real-time, at the impression level.
Remnant Inventory	Inventory that a Publisher is unable to sell directly which is turned over to a third-party and sold at a discounted rate.
Retargeting	Re-messaging various messages to a collective pool of participants based on the pools the buyer/client creates; usually involves collecting data by pixelating the Advertiser's website.
Second Price Auction	The winner of the bid pays the price of the 2nd highest bidder + 1 cent (also known as a Vickrey auction).
Supply Side Platform/Sell Side Platform (SSP)	An entity which facilitates the sale of a publisher's inventory through an ad exchange. SSPs offer services such as minimum bid requirements, etc.
Tagging	The process of placing a pixel on an Advertiser's website or search landing pages to "tag" users as having visited those pages so that they can be eligible for subsequent targeting/messaging.
Trading Desk	Online ad traders plugged into a DSP or ad exchange.
Whitelist	A list of web sites that an Advertiser will permit their ads to be placed on. Websites not on this list will not be used to display ads for the Advertiser.
Win Rate	The number of impressions won over the number of impressions bid.
Yield Optimization	Technique employed by Publishers to determine what their ad impressions are worth and how to manage the flow of inventory to make the most money.

CANADIAN MEDIA DIRECTORS' COUNCIL

Innovation in the Face of Ad Blocking

Internet advertising made great strides towards its adulthood in 2016. Almost all aspects of digital media have been turned on their head. The most obvious driver of disruption and change to the channel has been the proliferation of ad blockers and the offshoot industry it has started to create.

IAB Canada conducted an in-depth study on the use of ad blocking in Canada. The study consisted of passive data as well as panel entries and revealed a Canadian average usage rate of 17%. The main motivation for using the software was general annoyance with ads (privacy issues were not at the top of the list). The findings did not indicate a rapid increase in adoption, but did indicate that almost 15% of consumers who used ad blockers later uninstalled them or disabled them due to poor performance of the software or more importantly, a negatively impacted user experience (content not being served). This finding, as well as confirmation that premium content was less likely to be blocked, bodes extremely well for the industry.

In late 2015, IAB announced a global initiative to improve user experiences online by collaboratively re-engineering acceptable ad standards. Light, Encrypted, Ad Choice Supported and Non-Intrusive (LEAN) ads are imperative to restore consumer experiences online. Once implemented, this program will diffuse the most

commonly used rhetoric in the blocking world—users are tired of the ads as they exist today.

In addition to LEAN ads, IAB also released an ad-blocking detection code to its members. This code allows publishers to identify visitors to their sites as ad-block enabled. This tool will then allow the publishing community to exercise the best practices outlined through DEAL, an international approach to ad-block users. The four steps of DEAL are:

- **Detect** ad blocking, in order to initiate a conversation
- **Explain** the value exchange that advertising enables
- **Ask** for changed behaviour in order to maintain an equitable exchange
- **Lift** restrictions or **Limit** access in response to consumer choice

Perhaps the most exciting development arising out of the discussion on ad blocking has been the overarching agreement amongst advertisers and publishers that we are ripe for innovative new formats. The communication between brands and consumers online is in need of an overhaul.

The first instalment of this new world has arrived in the form of native advertising. The growth of content marketing in 2016 is a clear testament to the desire of brands to engage more deeply with their audiences. Our work in this area is to urge high standards of execution and to avoid duplicating the blindness we experienced with banner advertising. The conversation today is



Sonia Carreno | President, IAB Canada

around mastering quality at scale. In 2017, we will see enormous growth in programmatically purchased native advertising and we will have a better understanding of whether the format is sustainable based on the sheer volume that is being served.

The coming months and into 2017 will see the industry rallying around new formats and an increase in publisher services to accommodate them. Obstacles like the one we face today in the form of ad blocking can breathe desperately needed new life into the landscape. ●

Ad Avoidance: More Tech-Enabled Than Ever

The fall of 2015 marked a key transition. When Apple's iOS 9 started allowing content blocker extensions to their default web browser Safari, ad blocking apps rocketed to the top of the App Store charts. On desktop, 17% of Canadians use ad blockers like Ad Block Plus, and their spread to mobile has increased consumer awareness. While concerns about privacy and battery usage play a part in the adoption of these extensions, the net result is that fewer ads are seen. It's worth noting, however, that the vast majority of time spent on mobile is not in the web browser but in apps, where these extensions don't work. And ad blockers are not nearly as popular on mobile devices: in Canada use of ad blocking is three times higher on desktop versus mobile (IAB Canada and ComScore Ad Blocking Study 2016).

In addition to ad blocking, consumers are increasingly choosing ad-free services, and new ones are rising to meet that demand. To compete with Netflix, Bell introduced its on-demand streaming service CraveTV in December 2014. (Rogers and Shaw launched Shomi in 2014, but announced its shutdown this past fall.) And with Facebook's recent unveiling of Ad Preferences—allowing consumers to block certain advertisers from their feed—ad-free content has quickly become a consumer expectation.

Despite all the concern over online ad blockers, ad avoidance is by no means an online issue. PVRs are a mature technology, with over 60% Canadian household penetration. Twenty percent of adult linear primetime TV viewing is now watched in playback mode, up significantly from 7% just five years ago.

Beyond video, audio media ad avoidance is just as significant. Media time in cars is seeing growth in Bluetooth-connected phones, mostly playing ad-free music or podcasts with native ads. Some mobile carriers, including EE and others across Europe, are considering solutions from companies like Shine, which block ads from reaching all handsets on their networks.

But as emerging technology limits some advertising opportunities, new ones are created. Product placement in video is getting more sophisticated. Technology from Mirriad can replace a McDonald's with a Wendy's storefront, or a can of Pepsi with a Coke. And as more content that allows for these kinds of changes grows, so does the marketer's opportunity to create scale through emerging channels.



People have always found ways to filter out ads. Today, technology is simply making it easier than ever before.

However, it's important to remember the adage from the late Howard Gossage as a way forward: "People don't read ads. They read what

interests them and sometimes that's an ad." GE's recent success with their eight-episode series "The Message" is a perfect example. The Neiman Lab's Laura Hazard Owen said that the show was able to hit number one on iTunes' podcast charts by "sounding nothing like an ad."

The net of all this is a simple truth: consumer attention is not a given. Whether blocked by technology or simply ignored, there is a difference between exposure and impact and it's one that we need to start accounting for in our measurement models. The growth of technology-based ad blocking is not a problem to be solved, it's a message from consumers to think differently and try harder. We must rise to the occasion. ●

Digital Startups: The Next Big Wave

The tech and media world have become the start and end to most conversations when it comes to the world's largest companies. And for good reason: Apple, Alphabet (Google), Microsoft, Amazon and Facebook are all included in the top 10 most valuable companies in the world.

In 2005, only one of those companies, Microsoft, was in the top 10 and one was not even officially open to the general public (Facebook). This fact has changed the pace of expectations of new businesses entering the tech and media field. Unicorns, or companies yet to go public that have \$1 billion dollar valuations, are becoming more crowded: Snapchat, Shopify, Uber, Kik, and Airbnb are just a few companies in that ever more crowded club. There are almost too many to sort: some will win, some will be acquired and disintegrated by the buyer, and some will fizzle out before any end game.

Who will be in the next wave of high-growth, high-value companies that make a change in market? Out of the current field of Unicorn Club players and potential players, there are three that have true potential to make some significant steps forward in the next 12–16 months.

Slack – A lot of people have still not heard of Slack, but millions certainly have. Since its launch in 2013, the enterprise-communications platform has acquired more than three million daily active users and has a touch rate of 140 minutes per weekday amongst those users. It's updated the perspective on how seamless, fluid and engaging workplace communication can be. That's no easy ask, but it's working. Our email inboxes have long been the central hub of how we communicate and work through complex project scenarios, disparate geographies, and daily tasks for over 25 years. Nothing stays the same, and there is always a better way. Slack is in a very good position to be it. Its current \$3.8 billion valuation would suggest it's well on its way.

Shyp – The taxi industry is re-inventing itself, as Lyft and Uber provide enlightened options to the status quo. What could be the next common, high-touch thing that is made easier by tech? Consider the arduous steps aligned with sending or returning a package. There is some mild skill required to pack it up, understand the weight, know the exact coordinates and navigate the shipping to the retail storefront. People are busy and



errands related to shipping end up being a huge hassle. Shyp, a company founded by a Canadian, Kevin Gibbon, is making all this easier with a technology interface that helps users by connecting them with people who pick up, professionally package, and send stuff for the lowest price for the item(s) to be returned. Shyp has expanded its services to San Francisco, Los Angeles, New York and Chicago, and will see more cities launch in the coming months. Currently valued at a quarter of a billion dollars, Shyp will boom or bust with expansion into other markets.

Scribble Live – Agencies and advertisers have all bought into the new reality that content marketing is not only an over-talked phrase, but it's also essential. Reaching audiences across platforms requires a consistent, well-managed and informed strategy. It's easier to say than do, and software company Scribble Live has built a suite of tools that help plan, measure, construct and publish content. This Toronto-based company is firmly established with clients such as Red Bull, Canadian Tire, NFL and Nissan. With its client expansion, Scribble Live now operates in every major global region, has five offices in North America and has expanded into Europe and Asia Pacific. With content marketing maturing and getting more rigour in place, Scribble Live is already a leader in this space that stands to gain more clients and agency partnerships in the near term. ●

COMMENTARY

The death of traditional television has been greatly exaggerated.

While it's been a topic of conversation for years, TV continues to evolve and actively respond to new market developments. It remains relevant and important both now and into the future.

The biggest challenge for traditional TV broadcasters is the ongoing (and massive) tech disruption and its impact on viewing habits and consequently their business. The onslaught of quality streaming options, PVRs, VOD, mobile, Netflix and cord cutters has been perceived as leading to an inevitable TV funeral.

At the same time, others are saying it's the Golden Age of television. Some of the most well-received programming ever is being produced, while traditional TV continues to have the highest daily reach of any medium in Canada: 89% for adults 18+, with time spent at 28 hours per week, according to Numeris. Even for digital-forward younger adults, TV reaches 82% of millennials 18-34 and 81% of young millennials 18-24 each day.

Despite the "great unbundling of cable TV," which allows Canadians to pick and pay for TV channels a la carte, the consensus is that TV remains a powerful medium.

It combines mass audience reach in an increasingly fragmented media universe, and provides superb content that delivers safe, brand-enhancing environments for advertisers. The emerging potential of programmatic buying and addressable targeting is now being added to this legacy.

Although in some areas Canada lags other countries in applying new TV technologies, our cable/satellite broadcasters are starting to make progress. Set-top box data is allowing advertisers to target a much more defined set of attributes, resulting in reduced message waste. And while this is a good start, the true promise of the new TV will come when addressable technology supports individual ads being delivered to specific households, chosen based on a rich database. Canada has the potential to be a world leader in this area. Advertisers and agencies should be demanding that the media industry aggressively invest to bring this opportunity to market.

The promise is real. With more refined TV targeting and flexible, data-driven trading options, seven out of the eight most advanced markets worldwide have seen traditional TV ad spend grow over the last year. In the UK, Sky launched its Media AdSmart platform in 2014 and now has seven million household subscribers. This platform is capable of delivering addressable advertising by matching marketers' audience data with highly vertical viewing data, and then deploying advertising



both through linear "TV on-demand" and "Sky Go VOD." In the recent 2016 Future TV Advertising Forum, Sky revealed that 73% of advertisers using the platform are either new to Sky or entirely new to TV, and there has been 33% less ad switching from targeted ads.

We live in a world of disruption.

This drives healthy change and growth.

For TV, the dominant medium for many years and perhaps once in danger of resting on its laurels, the challenges and opportunities of digital and data technologies are moving us toward an exciting future. Marketers and agencies that are early to apply and test the new TV technologies will be well positioned for an eventual "unfair advantage." ●

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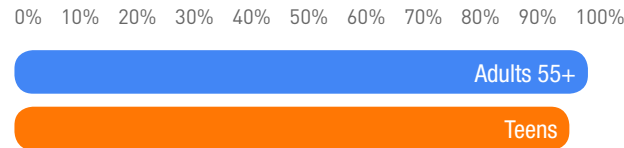
Contributors:

Karen Purewall,
Associate Director, Insights, Mindshare;

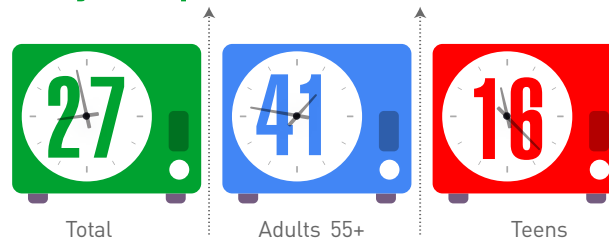
David Morgan,
Trading Director, Mindshare;

Ricky Lui,
Trading Director, Mindshare

Traditional television reaches 97% of Canadians over the course of an average week.



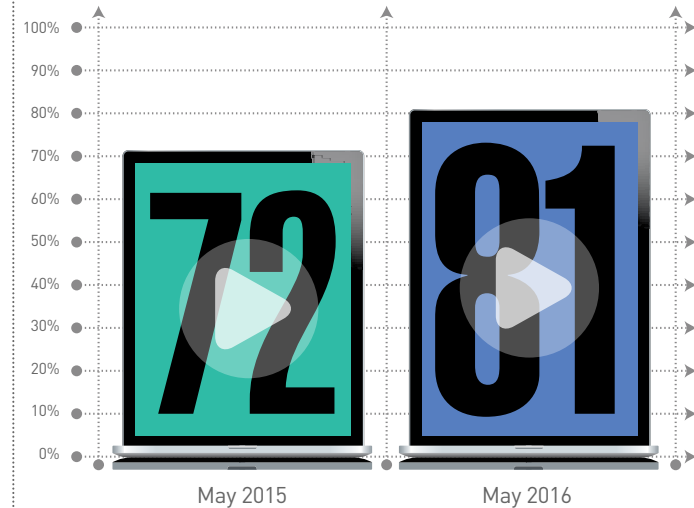
Weekly Time Spent With Television (hrs)



Source: ComScore Video Metrix; May 2016

Online Video Content

As of May 2016, online video content on PCs reached 81% of all Canadians. This represents significant growth from May 2015 (72% reach).



Source: ComScore Video Metrix; May 2016

NATIONAL NETWORKS – ENGLISH

CBC TELEVISION is a 24-hour English language network for news, information, sports and entertainment programming, much of which is produced by, for and about Canadians.

CITY (a division of Rogers Media) is a semi-national network with stations in Ontario, B.C., Alberta, Manitoba, Saskatchewan and Quebec. It broadcasts news, information and entertainment programming.

CTV (a division of Bell Media) is Canada's largest private broadcaster. It features a wide range of news, sports, information and entertainment programming. CTV Two is sold on a network basis as well as regionally and selectively.

GLOBAL (a division of Corus Entertainment) is an unwired national network reaching 98% of English-speaking Canada. It broadcasts news, information and entertainment programming.

NATIONAL NETWORKS – FRENCH

RADIO-CANADA is a French-language television network owned by CBC. Programming includes news, current affairs, information and entertainment, with children's shows airing in the mornings.

TVA (a subsidiary of Quebecor) is a private French-language television network featuring entertainment and public affairs programming, with 75% dedicated to local content. With 10 local stations (six owned by TVA and four affiliates), it's available on cable in Quebec and across Canada.

REGIONAL NETWORKS – ENGLISH

CBC Regional Networks

- CBC Maritimes can be purchased to cover New Brunswick, P.E.I. and Nova Scotia
- CBC Ontario covers the entire province of Ontario
- CBC Pacific covers the entire province of British Columbia
- CBC North covers the Northwest Territories

CTV Regional Networks

- CTV Atlantic blankets Atlantic Canada including Newfoundland, Labrador and P.E.I.
- CTV Ontario covers all of Ontario
- CTV Saskatchewan covers 97% of the population of Saskatchewan

Rogers Retail Network

SCN City Saskatchewan is a Canadian English-language cable television channel in Saskatchewan.

CTV TWO (a division of Bell Media) features a mix of news, drama, comedy and reality programming on the second CTV conventional network covering Vancouver/Victoria, Toronto/Barrie, Ottawa, London, Windsor and Atlantic Canada. CTV Two Alberta, the provincial educational broadcaster, features both formal educational programming and popular CTV Two series.

CHCH (owned by Channel Zero) originates in Hamilton with transmitters located throughout Ontario. It features a weekday rolling news format, entertainment series and movies.

CP24 (a division of Bell Media) is Toronto's 24-hour local news channel.

KNOWLEDGE NETWORK is an English-language public educational cable television network in B.C. It is owned by Knowledge Network Corporation, a crown corporation of the Government of British Columbia.

OMNI (a division of Rogers) is a free, over-the-air multilingual/multicultural broadcaster in the markets of Vancouver, Calgary, Edmonton and Ontario. It broadcasts in more than 20 languages including some syndicated series in English.

SHOP TV CANADA is a direct-response television shopping service broadcasting in the south-central Ontario and Nova Scotia regions and is owned by Torstar Media Group.

TVONTARIO, often referred to as TVO, is a publicly funded, educational public non-commercial English-language television station and media organization in Ontario. It is operated by the Ontario Educational Communications Authority, a Crown corporation owned by the Government of Ontario.

YES TV, formerly CTS, airs predominantly Christian-based religious programming along with syndicated reruns of family-oriented mainstream series. CTS serves the Hamilton, London, Ottawa, Calgary and Edmonton markets.

REGIONAL NETWORKS – FRENCH

TÉLÉQUÉBEC covers the entire province and carries both original, American and some international series with a focus on entertainment, culture and education.

TFO is an educational and cultural public television station in Ontario with a focus on children's programming as well as documentaries and repertory films for adults. It is the only French-language multimedia network in Canada that is headquartered outside of Quebec.

V is a privately owned station covering approximately 94% of Quebec. Both network and selective bookings can be made. Programming includes locally developed program, movies and top U.S. series.

SPECIALTY NETWORKS – ENGLISH

ABORIGINAL PEOPLES TELEVISION NETWORK (APTN) is the first Aboriginal television network in the world with programming by, for and about Aboriginal Peoples.

BUSINESS NEWS NETWORK (BNN) is devoted exclusively to business and finance news and features a stock ticker with real-time data from the TSX, NYSE and NASDAQ.

BRAVO is an entertainment channel with a focus on television dramas and films as well as art-related programming.

CBC NEWS NETWORK is a 24-hour all news and information station providing live news updates throughout the day as well as documentaries.

COMEDY NETWORK airs a variety of comedy-related programming including sitcoms, sketch series, reality TV, talk shows, stand-up comedy programs, animation and more.

COUNTRY MUSIC TELEVISION (CMT) airs country music and family-oriented general entertainment programs in the form of music videos, award shows, concerts, sitcoms, etc.

CTV NEWS CHANNEL broadcasts news headlines, breaking news and information on a 24-hour schedule.

DISCOVERY CHANNEL is devoted to nature, adventure, science and technology.

DTOUR focuses primarily on lifestyle and travel-related programming.

E! features entertainment-related programming, reality television, feature films and occasionally series and specials unrelated to the entertainment industry.

FAMILY CHANNEL is an entertainment destination for tweens and teens driven by relevant, must-see innovative programming. Family, Family Junior and Family CHRGD have an output deal with Mattel.

FOOD NETWORK features programming related to food, cooking, national and international cuisine, and the food industry.

HGTV broadcasts programs on home and garden design, real estate and renovations.

HISTORY CHANNEL presents programming from various genres including documentaries, dramas, films and human-interest series.

MTV offers a Canadian interpretation of the U.S.-based MTV, delivering innovative lifestyle, talk and documentary programming.

MUCHMUSIC delivers a variety of music-related programs, pop and youth culture. In recent years, the channel has downplayed its music programming in favour of teen dramas and comedies.

M3 is also devoted to music-related programming via music videos, films, concerts, dramas and reality TV, with a focus on adult contemporary music, classic rock and lighter music than sister station MUCH.

OLN broadcasts factual-based action and adventure programming and reality television series primarily aimed at male audiences.

OPRAH WINFREY NETWORK (OWN) features reality, talk and lifestyle programming.

SLICE broadcasts lifestyle and entertainment programming aimed at women in the form of reality TV series, documentaries and talk shows focusing on fashion, beauty, entertainment, health and finance.

SHOWCASE predominantly airs works of fiction centred on scripted television series and films.

SPACE features science fiction, fantasy, horror and paranormal programming including films, documentaries, scripted series and more.

CANADIAN MEDIA DIRECTORS' COUNCIL

SPORTSNET 360 provides sports news, highlights, information and analysis programming, along with live-event sports coverage. Sports scores run along a 24/7 ticker on the bottom of the screen.

SPORTSNET carries both national and regional sports programming, most notably NHL Hockey, Major League Baseball (Toronto Blue Jays), NFL, soccer and more. Advertising can be purchased both nationally and regionally.

TELETOON airs animated television series aimed at both children and adults.

TREEHOUSE is a non-commercial station offering programming for children eight and under.

TELELATINO (TLN) broadcasts general-interest programming from Canada and around the world primarily in Italian and Spanish.

TSN is a sports channel airing CFL, NHL, NFL, MLS, F1, IIHF, World Junior Hockey Championship as well as sports news and commentary.

VISION TV offers multi-faith and multicultural programming along with comedy, drama and feature films for viewers 45+.

W NETWORK airs a mix of lifestyle and entertainment series including films, comedies, dramas, reality TV, and cooking and makeover series all aimed at women.

WEATHER NETWORK broadcasts local and national weather forecasts and weather-related segments in a news-wheel format 24/7.

YTV specializes in programming for children and teens through live-action and animated series, many of them from Nickelodeon in the U.S.

SPECIALTY NETWORKS – FRENCH

ARTV is the only French-language arts and entertainment specialty channel, with programs such as live concerts, movies, dramas, documentaries and magazines.

CANAL D covers a wide range of documentary subject matter, including forensics, science, the environment, the animal kingdom and various social issues.

CANAL VIE focuses on renovating, decorating, beauty, fashion and cooking.

ÉVASION offers tourism and travel programming.

EXPLORA is devoted to health, science, nature and the environment.

HISTORIA airs documentaries series and films devoted to Quebec and world history, delving into the past with a modern perspective.

ICI RADIO CANADA TÉLÉ is a Canadian French-language television network. It is owned by the Canadian Broadcasting Corporation, known in French as Société Radio-Canada.

LCN (Le Canal des Nouvelles) broadcasts news and public affairs programs 24/7.

MÉTÉOMÉDIA is the French counterpart of The Weather Network, providing weather and weather-related information.

MUSIMAX is a pop music station with interviews, clips, concerts and documentaries.

MUSIQUEPLUS features music and entertainment programming with a focus on a younger demographic.

RDI (Réseau de l'information) is a 24-hour news station with round-the-clock updates of news coverage of major stories on an international, national and regional level.

RDS – LE RÉSEAU DES SPORTS airs major sporting events in French including Montreal Canadiens, CFL and NHL.

RDS2 is the sister station to RDS, airing major live sporting events and sports news.

SÉRIES+ features popular American and Canadian fiction series.

TÉLÉTOON – FRENCH offers 24 hours of the best cartoons from Canada and the U.S., with programming that appeals to kids of all ages.

TV5 provides diverse French-language programming from Canada and around the world, including drama, sports and documentaries.

VRAK is aimed at youth and features local programs, sitcoms and fictional and animated series.

CANADIAN MEDIA DIRECTORS' COUNCIL

ZTÉLÉ is a Canadian French-language Category A. Category A Ztélé focuses on programming primarily from the science fiction, fantasy, and technology genres consisting of dramas, films and documentaries.

O broadcasts primarily sci-fi and technology shows, including dramas and films.

DIGITAL NETWORKS – ENGLISH

ABC SPARK is aimed at preteens and teenagers, with additional general-interest family programming. It is fashioned after the U.S. channel ABC Family.

ACTION broadcasts action-related films and television series.

ANIMAL PLANET is an animal entertainment brand that captures the drama and fascination of the animal kingdom.

AMI AUDIO is a 24-hour non-profit audio broadcast television service that broadcasts readings of news articles and features from more than 600 of Canada's top newspapers and magazines as well as audio theater and films.

AMI TV broadcasts a selection of general entertainment programming with accommodations for those who are visually or hearing impaired.

AUX offers music videos and music-related programs profiling new and emerging artists in alternative, hip hop, indie rock, indie pop and other genres.

AXN MOVIES broadcasts films from the Sony Pictures Entertainment, 20th Century Fox, Paramount Pictures and Universal Pictures libraries that focus on action and adventure themes.

BBC CANADA is home of the best in British television from the BBC.

BBC KIDS provides BBC programming for kids 2–17.

BIO (The Biography Channel) features biographies on famous people and events throughout history and today, including celebrities and politicians, historical figures and more.

CARTOON NETWORK airs mainly animated programming, ranging from action to animated comedy. It is primarily aimed at children and teenagers 7–16 and older adults with their night rotation.

CI: CRIME & INVESTIGATION CHANNEL strives to engage viewers' minds and crime-solving skills, drawing the audience into investigations by offering a behind-the-scenes look at gripping, unforgettable crime stories.

COMEDY GOLD pays tribute to the sitcoms of the '70s, '80s and '90s.

COSMOPOLITAN TV has a focus on sex, relationships, fashion and beauty in the form of comedies, dramas, reality programs, films and more.

COTTAGE LIFE features outdoor living, real estate, DIY and design, food and entertaining programming.

CULT MOVIE NETWORK is devoted to cult films from a

variety of genres including horror, fantasy, comedy and action.

DAYSTAR TELEVISION CANADA broadcasts religious programming dedicated to the Christian faith. It is owned by World Impact Ministries.

DEJA VIEW broadcasts sitcoms from the '60s, '70s, '80s and '90s.

DISCOVERY SCIENCE celebrates today's trials, errors and breakthroughs that change the world.

DISCOVERY VELOCITY, formerly Discovery World HD, features automotive and adventure-oriented programming.

DISNEY CHANNEL is a localized version of the U.S. network of the same name, broadcasting live-action and animated programming aimed at children 6–14.

DISNEY JUNIOR is aimed mainly at children under 8. Its programming consists of original first-run television series, theatrically-released and made-for-DVD movies and select other third-party programming.

DISNEY XD is aimed primarily at children 6–11. Its programming consists of original first-run television series, current and former original series and made-for-cable films from sister network Disney Channel, theatrically released movies, and some live-action and animated programs from other distributors.

DIY airs shows, stunts and specials to assist viewers with basic home improvement needs.

CANADIAN MEDIA DIRECTORS' COUNCIL

DOCUMENTARY features Canadian and international documentary films along with select television series.

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

FAMILY CHRGD (formerly Disney XD) targets kids 6–11 with unique content, partner brands and select Canadian originals.

FAMILY JUNIOR (formerly Disney Jr) is a preschool destination for kids 2–6.

FASHION TELEVISION CHANNEL broadcasts programming related to fashion, modelling, photography, art, architecture and design.

FIGHT NETWORK airs programming related to wrestling, boxing, mixed martial arts and other combatant lifestyles.

FNTSY SPORTS NETWORK broadcasts programming aimed at the fantasy sports market including commentary, call-in shows, coverage of drafts, and reality series.

FX CANADA is devoted to scripted dramas and comedies and is based on the U.S. cable network FX.

FXX Aimed at young men 18–34, the channel's programming focuses on original and acquired comedy series, some dramatic programs and feature films.

FYI hosts a hub of lifestyle programming with a mix of reality, home renovation and makeover series.

G4TECHTV connects young adults to the latest in entertainment, gaming, pop culture and technology.

GAME TV specializes in game-related programming such as game shows, reality programs and casino games.

GUSTO focuses primarily on food-related programming with additional lifestyle programming on relationships, travel and design.

H2 is a spinoff of the History channel, offering a broader view of history that touches on science, technology and pop culture.

HIFI TV carries musical and art-based programming in the form of films and concerts.

HPI TV broadcasts thoroughbred, standardbred and harness racing events and related programming from around the world.

iCHANNEL focus on public, social and current affairs. Its programming includes films, documentaries and talk shows.

IFC is devoted to independent films, documentaries and television series.

INVESTIGATION DISCOVERY focuses on the world of crime, forensics, paranormal investigations and modern mysteries.

JUICEBOX is a commercial-free service that broadcasts music videos aimed at pre-teens.

LEAFS TV offers content on the Toronto Maple Leafs including game coverage, profiles and analysis.

LIFETIME offers touching movies, original scripted series and real-life fare aimed at women.

LOVE NATURE formerly Oasis HD, broadcasts nature-themed programming on a wide variety of topics, from animals to landscapes to outer space.

MAKFUL Broadcasting do-it-yourself projects in the area of food, design, style and crafts.

MGM broadcasts films primarily from the Metro-Goldwyn-Mayer library in addition to Canadian content. Films are broadcast in their entirety, uncut and commercial-free with commercial messages airing between films.

MOVIETIME features big-ticket movies with more than 250 movie titles each month and back-to-back movies on weekends.

MTV2 is a lifestyle and general entertainment channel aimed at youth and teen audiences, airing a mix of music video programs, drama, comedies, talk shows and more.

MUCHLOUD broadcasts rock, modern rock, alternative, punk and heavy-metal music programming, with music videos, concerts, interviews and more.

MUCHMORERETRO is a commercial-free service that broadcasts music videos from the 1980s, 1990s and early 2000s.

MUCHVIBE broadcasts urban music programming such as rap, hip hop, r&b and reggae, with music videos, concerts, interviews and more.

CANADIAN MEDIA DIRECTORS' COUNCIL

NATIONAL GEOGRAPHIC CHANNEL features documentary and human-interest programming that explores the natural world.

NATIONAL GEOGRAPHIC WILD focuses solely on animal-related programming.

NBA TV airs pre-game programming and encore presentations of Raptors games.

NHL NETWORK CANADA offers viewers 24-hour hockey coverage both on and off the ice including live NHL games.

NICKELODEON airs programs aimed at children including live-action series, animated favourites and classic hits.

ONE BODY, MIND, SPIRIT, LOVE CHANNEL is devoted to programming on yoga and meditation, weight loss and fitness, sex and relationships, natural health and nutrition, and alternative medicine.

OUT TV serves the LGBT community and features Hollywood movies, indie favourites, documentaries, drama and real-life programming.

PET NETWORK is devoted to pets and people who love them, with original family programs, documentaries, reality shows and animal movies.

RADX broadcasts action and adventure-related programming such as high-adventure activities, extreme sporting events and action-themed films.

REWIND primarily broadcasts feature length films from the 1970s, 1980s and 1990s targeted toward the Generation X demographic.

SILVER SCREEN CLASSICS concentrates on classic movies.

SMITHSONIAN CHANNEL is inspired by the Smithsonian Institution's museums, research facilities and magazines, and features original non-fiction programming that covers a wide range of historical, scientific and cultural subjects.

SONY MOVIE CHANNEL consists entirely of films from the Sony Pictures Entertainment library, including content from Columbia Pictures, TriStar Pictures and Sony Pictures Classics.

SPORTSNET ONE is a companion channel for Rogers Sportsnet, profiling NHL, MLB, NBA, soccer and more.

SPORTSNET WORLD primarily airs top-level soccer from leagues in Europe and matches from such sports as Rugby Union, Rugby League, and events from the Gaelic Athletic Association, including Gaelic football, cricket and hurling.

SUNDANCE CHANNELS focuses on independent films, documentaries, music series, dramas and more.

T+E (TRAVEL & ESCAPE) is devoted to travel and adventure programming.

TSN2, TSN3, TSN4, TSN5 feature a schedule of sports and events including the NHL, NBA, MLB, MLS, NLL and curling.

VICELAND focuses on lifestyle oriented documentary and reality series aimed towards millennials.

W MOVIES is a 24/7 movie channel aimed at women.

WARNER FILMS broadcasts films primarily from the Warner Brothers library in addition to Canadian content. Films air uncut and commercial-free with commercial messages airing between films.

WILD TV provides hunting and fishing programs from Canada and around the world.

WORLD FISHING NETWORK (WFN) broadcasts fishing-related programming including both recreational and sport fishing, as well as lifestyle programming.

DIGITAL NETWORKS – FRENCH

ADDIK TV offers a wide variety of entertainment and fiction programming from the major Canadian and U.S. networks.

AMI-TÉLÉ offers 70% original Canadian programming with both closed captioning and described video. Ami-Télé is deemed a must-carry service by the CRTC and can be found on all basic digital TV packages offered by class 1 & 2 cable systems and satellite direct-to-home services.

CANADIAN MEDIA DIRECTORS' COUNCIL

ARGENT is a business channel focused on economic and business news, as well as personal finance. It also broadcasts entertainment shows related to money.

AVIS DE RECHERCHE is a public-interest television network whose programming is entirely devoted to public safety. The station broadcasts images of wanted suspects, missing persons as well as safety and prevention messages.

CASA offers inspiring and accessible content related to cooking, renovation, decoration, design and real estate.

CANAL D INVESTIGATION is a network based on the fascinating world of crime.

LA CHAINE DISNEY is the French Canadian version of the Disney channel featuring programming for children 6–14.

DISNEY JR. is a commercial-free station airing learning-based programming for pre-kindergarteners.

MOI&CIE offers lifestyle and entertainment programming aimed at women.

PRISE 2 broadcasts retro episodes of classic sitcoms, dramas and mini-series, as well as older movies.

RDS INFO (formerly RIS Info Sports) covers news of professional and amateur sports including press conferences and events.

TVA SPORTS airs sports-related news and events such as the Ottawa Senators and UFC.

TVA SPORTS 2 was announced concurrently with the announcement that TVA would obtain French-language rights to the NHL through Rogers' 12-year deal with the league.

UNIS targets women, families and teens in time blocks, with programming such as travel, food and lifestyle.

YOOPA is dedicated to pre-school programming.

ZESTE airs culinary programming from Canada and around the world.

PAY TV SERVICES – ENGLISH

Disney Channels

Encore Avenue

Family Channel

HBO Canada

Movie Central

The Movie Network

The Movie Network EXCESS

The Movie Network FEST

The Movie Network FUN

The Movie Network ENCORE

The Movie Network ENCORE 2

Mpix

Super Channel

Viewers Choice

PAY TV SERVICES – FRENCH /OTHER LANGUAGES

ATN

Cinepop

Super Ecran

DIGITAL NETWORKS – OTHER LANGUAGES

ALL TV is a national Korean broadcaster operating two linear channels and a digital signage channel.

ATN operates 35 digital channels providing programming in several South Asian languages.

BIG MAGIC INTERNATIONAL is a Canadian exempt Category B Hindi language specialty channel that offers comedies, dramas, music, movies, business news, reality series, as well as some Canadian content.

BOLLYWOOD TIMES broadcasts Bollywood films in a variety of genres including action, comedy, horror and crime. It also airs television series including comedies, dramas and thrillers in Hindi.

CHANNEL PUNJABI TELEVISION provides Punjabi entertainment television to Canadian viewers.

CANADIAN MEDIA DIRECTORS' COUNCIL

COMMONWEALTH BROADCAST NETWORK (CBN) is a Canadian English-language Category B specialty channel that offers cricket programming as well as some lifestyle and informational content aimed primarily at Caribbean and African communities.

CCCTV is a Canadian exempt Category B Chinese-language specialty channel that broadcasts programming in Cantonese and Mandarin. The station primarily airs content from China, Hong Kong and Taiwan, as well as some local Canadian programming.

ERT-SAT airs programming targeted at the global promotion of Greece.

ETHNIC CHANNEL GROUP provides non-English digital TV channels to Canada's multicultural population. Languages offered include Arabic, German, Greek, Hebrew, Portuguese, Russian, Tagalog, Vietnamese, Iranian, Pakistani, Hindi and Urdu. The company holds 78 Category 2 digital licenses.

FAIRCHILD TELEVISION is broadcast through cable and satellite across Canada Fairchild TV, providing more than 300 hours per week of news and entertainment programming in Cantonese.

FESTIVAL PORTUGUESE TV (FPTV) broadcasts a variety of foreign and locally produced programs aimed at the Portuguese-speaking communities in Canada from Portugal, Brazil and Portugal's former African colonies. Programs include sports, news, telenovelas and more.

HTB (NTV) is a Russian-language channel broadcasting original NTV programming from Moscow and Canada.

LS TIMES TV focuses on current feature films from Hong Kong with a mix of popular movies from China, Taiwan, Japan, South Korea and other Asian countries.

MEHNDI TV is a national, niche third-language ethnic Category 2 specialty programming service. Its programming caters to Canadian women of South Asian heritage, and includes cooking shows, health and wellness programs, and reality series.

NEW TANG DYNASTY TELEVISION is a multilingual service, broadcasting programming in Cantonese, Mandarin, as well as in English and French.

NUEVO MUNDO TELEVISION is a Spanish-language channel broadcasting general entertainment and lifestyle programming including news, television dramas, talk shows and music.

ODYSSEY offers news, entertainment, sports and local programming directly from Antenna Satellite, a Greek network.

PTC PUNJABI CANADA includes news, music, serials, talk shows as well as live regional and national news, and programs devoted to new immigrants.

SAHARA ONE is a Hindi general entertainment channel. Programming includes daily soaps, movies, children's shows, game shows, talk shows and live call-in shows.

SKY TG 24 CANADA is an all-Italian specialty news, information and talk-TV channel.

SSTV features movies, news, dramas and music in Punjabi with select programs in English.

TALENTVISION features Mandarin programming from mainland China and Taiwan. It also has a Korean and Vietnamese block of programming.

TAMIL 1 offers a variety of Canadian and Tamil programming from around the world.

TAMIL VISION broadcasts a variety of Tamil programming, from local and world news and events to the latest movies and TV series.

TELELATINO (TLN) is a Canadian Category A specialty channel broadcasting general interest programming from Canada and around the world, primarily in Italian and Spanish, with some English programming.

TLN EN ESPAÑOL broadcasts news, dramas, talk shows, sports and more in Spanish.

TVONE CANADA features primarily entertainment programming including comedies, dramas and soap operas but also airs news and lifestyle shows in Urdu.

WOWTV broadcasts programming in Cantonese, Mandarin and Vietnamese from predominantly foreign sources as well as some local Canadian programming.

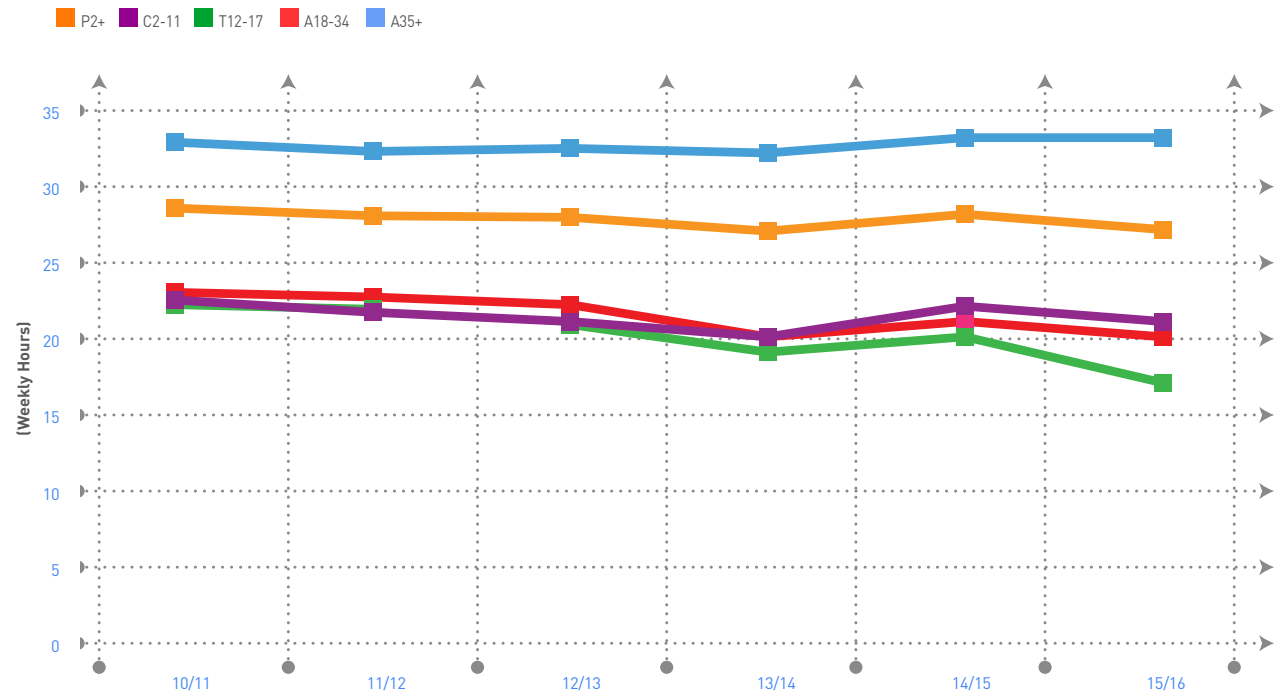
CANADIAN MEDIA DIRECTORS' COUNCIL

Traditional TV Viewing Patterns

Despite all the changes and growth in various forms of video sources, the time spent with traditional television has remained extraordinarily stable.

While the 2012/13 broadcast year appeared to signal the start of a decline, with teens especially impacted (likely due to a switch to online video viewing), overall viewing in 2015/16 remains robust.

Total Canada: Traditional TV Average Weekly Hours per Capita



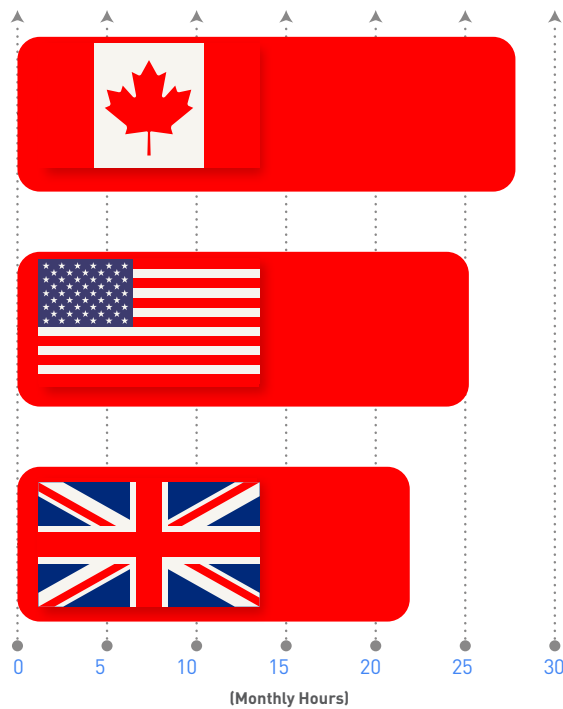
Source: Numeris, Total Canada, Weeks 1-18 2015/2016

CANADIAN MEDIA DIRECTORS' COUNCIL

OLV (Online Video)

We are a video nation. Canadians spend more time watching videos online compared to most other countries, as exemplified by monthly time spent relative to the U.S. and U.K.:

Monthly Hours per Viewer for Videos



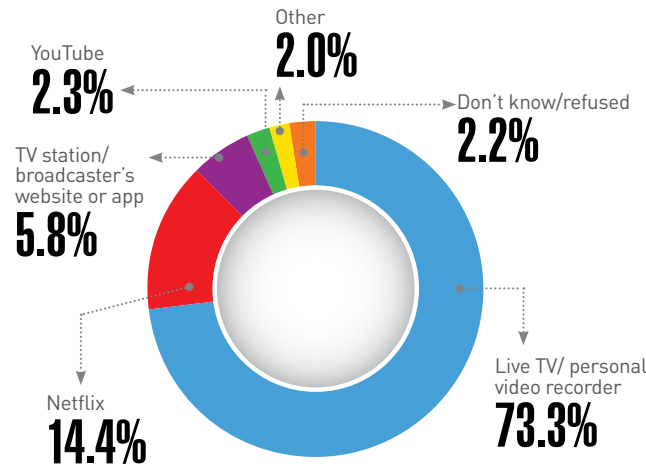
Source: ComScore, Inc., Video Metrix, CA, U.S., U.K., Home & Work, Persons 18+, Monthly Avg. Q4 2015

TV and Video Trends

1. CANADIANS STILL CHOOSE LIVE TV AS THEIR PRIMARY VIEWING SOURCE

Live traditional TV viewing continues to be the overall norm for Canadians, but certain viewing segments (e.g. males 18–34) lead the way in moving to alternate modes of accessing video.

Primary Platform Used to Watch TV (Canadian Adults 18+)

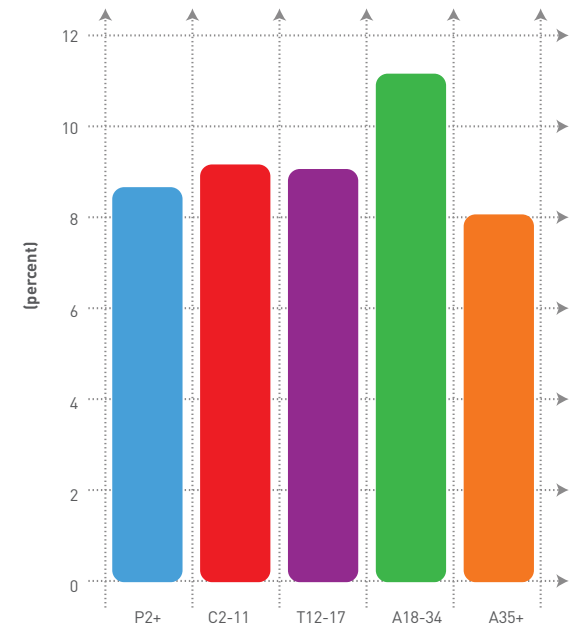


Source: April 2016 ThinkTV "Attitudes and Viewing Preferences;" eMarketer

2. DESPITE BROAD PVR OWNERSHIP, REAL-TIME TV VIEWING STILL DOMINATES

PVRs are found in 52%* of all Canadian households. While present in more than half of Canadian homes, PVR growth in usage has now flattened due to the explosion of alternative options for accessing TV/video content (VOD, streaming, time shifting).

Total Canada — PVR Playback as % of Viewing



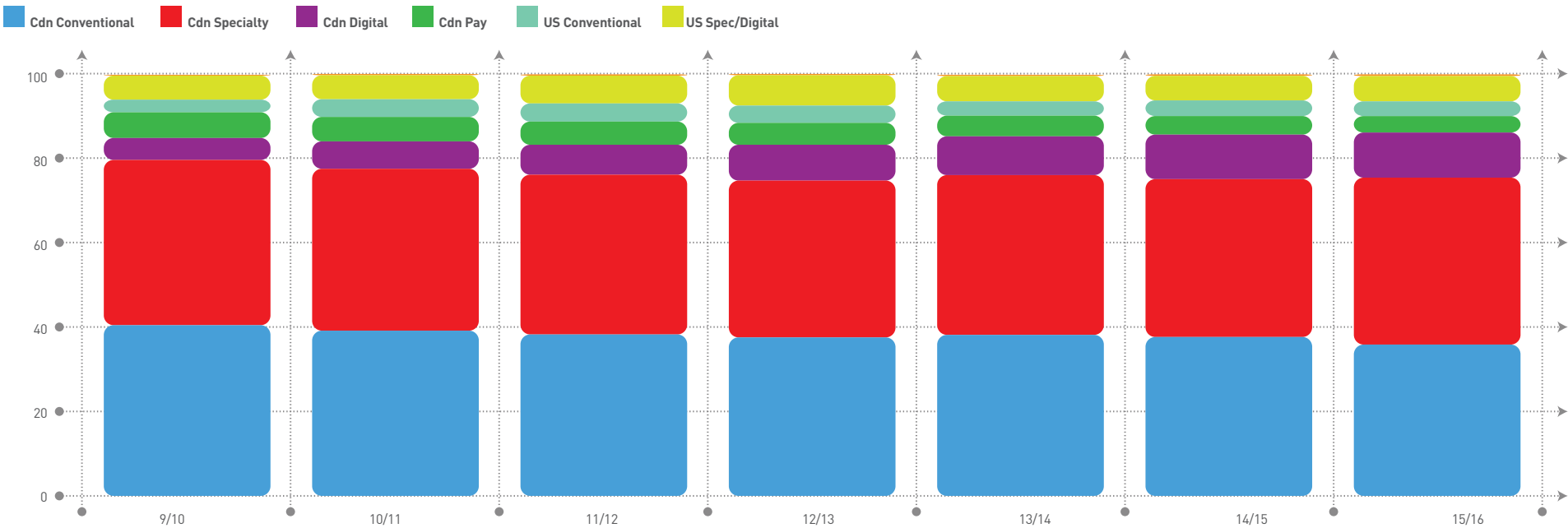
Source: Numeris, Total Canada, Weeks 1-18; Playback shown as % of Live+7 viewing.

*Numeris Q4-2016 Estimate; Penetration rate is based on all households in the denominator, not just TV households.

3. SPECIALTY CONTINUES TO GROW

With the launch of new stations and a shift in viewing preference towards niche programing, specialty stations as a group have increased their share at the expense of conventional stations.

Share of 2+ Tuning by Station Type



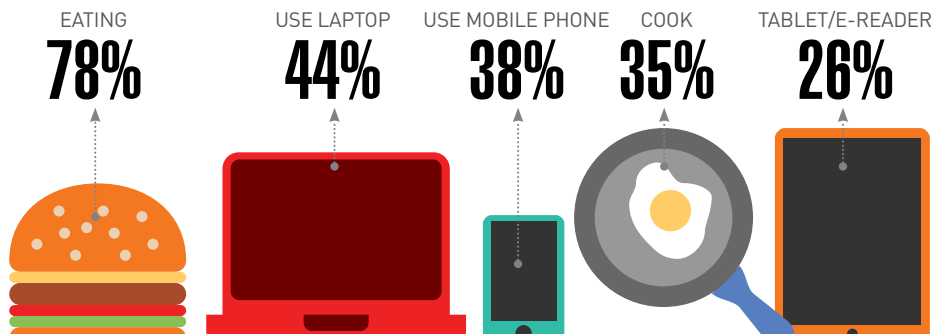
Source: Numeris, Total Canada, Weeks 1-18

CANADIAN MEDIA DIRECTORS' COUNCIL

4. TV VIEWERS ARE MULTI-TASKING MORE THAN EVER, WHILE SOME ARE "LEANING INTO" THEIR VIEWING MORE THAN EVER

According to a Mindshare proprietary study (Mindreader), Canadians are heavily multi-tasking while watching TV.

Activities While Watching TV

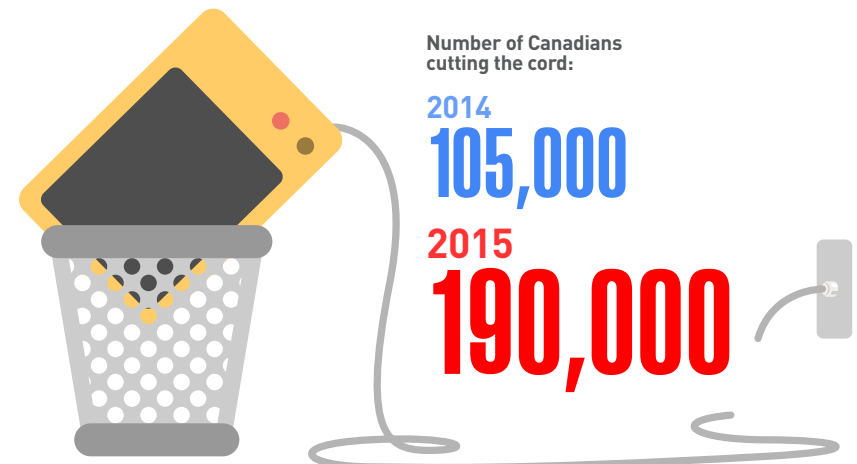


Source: Mindreader Fall 2015

However, at the same time, many viewers are going deeper in their engagement with TV through social media activity, especially using tablets/mobile, commenting on programming content in real time.

According to Twitter, television shows receiving high number of tweets in Canada included sci-fi, reality, soap opera and drama programming (including *Game of Thrones*, *The Voice*, *General Hospital*, *Big Brother Canada*, *Grey's Anatomy*, *Once Upon A Time*, *Arrow*, *Teen Wolf*, *How To Get Away With Murder* and *Empire*).

5. CORD CUTTING* CONTINUES TO GROW AS CANADIANS LOOK FOR MORE COST-EFFICIENT AND CONVENIENT WAYS TO ACCESS TV AND VIDEO CONTENT (STREAMING)



Source: Convergence Consulting Group

*Cord Cutting: Discontinuing or never committing to a TV cable or TV satellite provider.

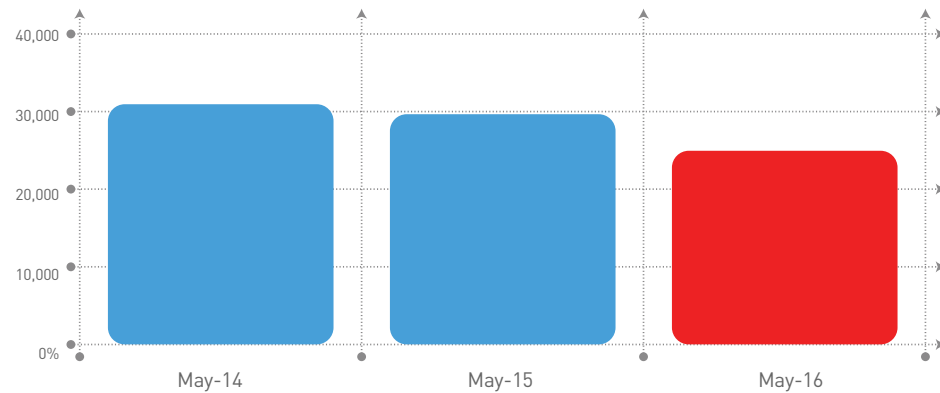
6. DEREGULATED BUNDLING OF TV CHANNELS RECEIVES LUKEWARM RECEPTION (SO FAR)

Despite the much anticipated \$25 "skinny" basic TV package launched in spring 2016, the CRTC has been flooded with complaints about the new offerings. According to the CRTC, complaints range from high costs, once extra fees are factored in, to a lack of choice. As a result, to date, this change has had minimal impact to TV viewership patterns, but it's early days and there will be some inevitable fallout over time.

7. ONLINE VIDEO (OLV) CONSUMPTION APPEARS TO BE MOVING OVER TIME FROM DESKTOP TO MOBILE

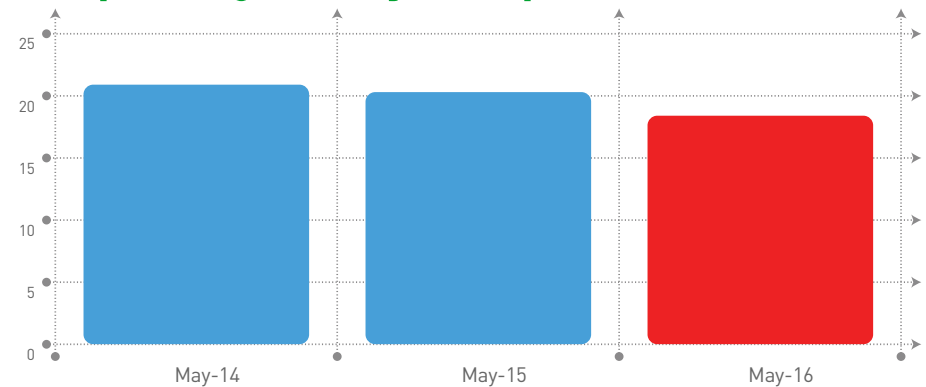
While ComScore does not have mobile video viewing data available at this time, the downward trend in desktop video minutes viewed suggests mobile is taking up a larger share of OLV.

Desktop: Total Monthly Minutes Viewed (MM)



Source: ComScore Video Metrix; May 2016

Desktop: Average Monthly Hours per Viewer

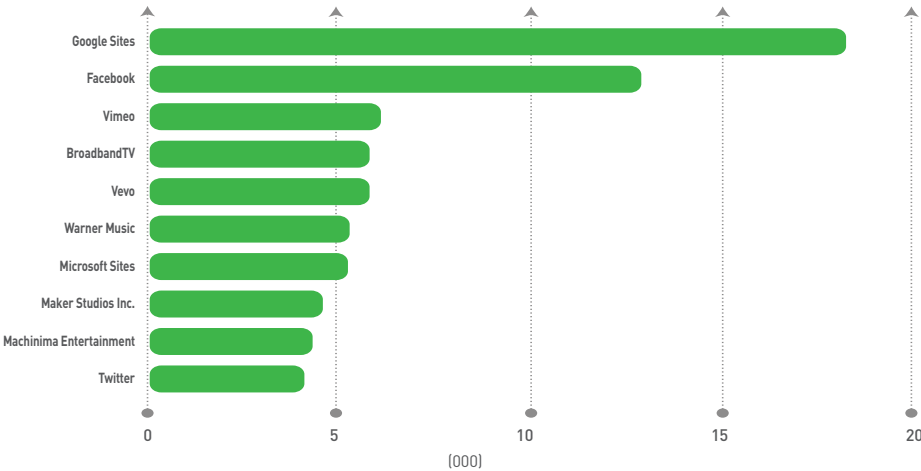


Source: ComScore Video Metrix; May 2016

8. CERTAIN ONLINE PLAYERS DOMINATE OLV

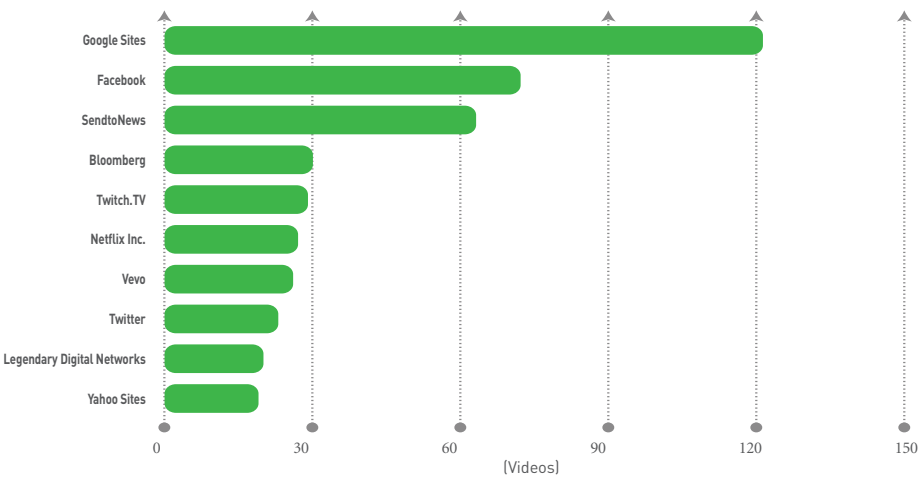
Data shows Google and Facebook continue to dominate the OLV landscape, but others own a significant share of the market. Engagement is strong with Netflix, as time spent with this service is significant. There is an abundance of programming available for viewers from both regulated and unregulated sites.

Monthly Total Unique Viewers (000)



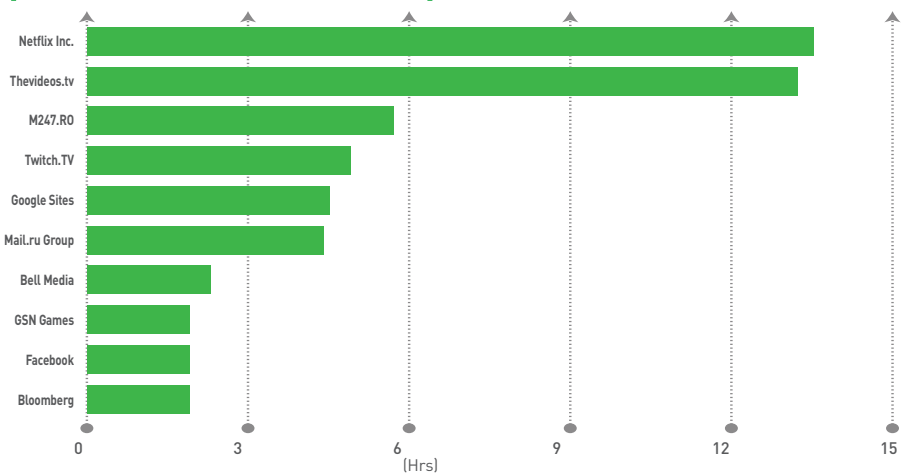
Source: ComScore Video Metrix, May 2016, A18+

Top OLV Sites Based on # of Videos per Viewer



Source: ComScore Video Metrix, May 2016, A18+

Top OLV Sites Based on Total Hours per Viewer



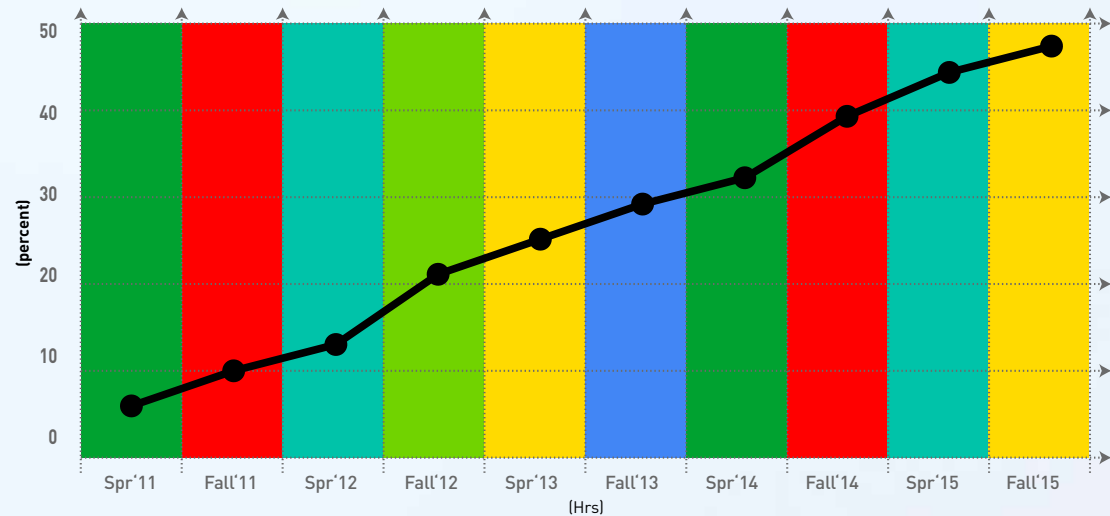
Source: ComScore Video Metrix, May 2016, A18+

CANADIAN MEDIA DIRECTORS' COUNCIL

9. NETFLIX CONTINUES TO GROW IN CANADA

The continued growth of Netflix in Canada is driven by a low subscription cost, array of content and viewer control. Netflix accounts are most prevalent in homes with children and teens—63% of households with a teen or child under 18 had a Netflix subscription in 2015. Households without children also had Netflix subscriptions. In 2015, 42% of respondents who had no teens or children at home had a subscription.

Netflix Subscribers Among English Speaking Adults in Canada



Source: Media Technology Monitor, "Media Technology Adoption Fall 2015," eMarketer

Measurement

Video measurement in Canada remains siloed, with no all-encompassing solution visible in the near future.

Numeris (formerly BBM Canada) continues to measure traditional television viewing through a combination of Portable People Meters (PPMs) (nationally and in major markets) and diaries. This year, Numeris expanded meter service to the anglophone Montreal market and successfully completed trials measuring VOD audiences using the PPMs. It also began producing monthly non-currency audience reports that include 28 days of playback viewing.

ComScore's Video Metrix panel service remains the currency for PC-based online video. However, mobile video remains aggregated within its Mobile Metrix service and cannot be broken out individually.

Passive audience measurement for over-the-top or smart TV systems remains a future promise. Currently, syndicated measurement consists of aggregate reporting in surveys like the Media Technology Monitor.

DATA SOURCES

NUMERIS

(formerly BBM Canada/Sondages BBM)

Head office – Toronto

1500 Don Mills Road, 3rd floor
Toronto, ON M3B 3L7
Phone: (416) 445-9800
www.numeris.ca

Numeris is a not-for-profit, member-owned tripartite industry organization that has been operating since 1944. Numeris provides broadcast measurement and consumer behaviour data, as well as intelligence to broadcasters, advertisers and agencies.

Television Audience Measurement

Numeris measures TV audiences using two methodologies: paper diaries and portable people meters (PPMs). Diaries are used to collect data on single weeks of viewing by persons age 2+ in the spring and fall in 38 markets. Viewing is recorded in 15-minute increments from 6 a.m. to 2 a.m. PPMs are used to measure TV audiences in Canada's five largest markets (Toronto, Vancouver, Montreal English and French, Calgary and Edmonton) and for national networks daily, 2 a.m. to 2 a.m. PPMs are small pager-like devices carried by a representative panel of persons 2+. They passively record exposure to TV programming and advertisements by picking up inaudible codes embedded in the broadcasts. Data can be reported in increments as small as a single minute.

Available TV Reports

REACH REPORT (Diary and Meter) includes TV station reach and share information for 12 demographic groups in all measured areas, organized by area and station. It is posted on the member-secure website.

SURVEY GUIDE (Diary) puts the latest survey data in context by showing any unusual events that may have affected the survey, and by presenting top-line summary data. It is intended to provide members with information on the sample and its characteristics, as well as the trends in viewing levels and other data. In addition, it allows an overall evaluation of the survey.

EM MARKET STATS CARD (Diary) provides relevant information about every Extended Market (EM) measured. A top-line summary of television market data for the spring and fall surveys showing population, total hours and a trend of VCR, cable, DVD and satellite penetration, as well as average hours/capita. The EM Stats card ranks market based on population and provides total hours tuned for that market. It also tracks the Audience Shares by Station Group for the last five surveys.

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

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TV DATA BOOK (Meter) provides an overview of national TV trends and characteristics of Canadian TV audiences, specialty station rankers and has qualitative and household characteristics.

NLOGIC**Head Office – Toronto**

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Toronto, ON M3B 3L7
Phone: (416) 445-8881
www.nlogic.ca

Nlogic helps clients make sense of audiences. As a subsidiary of Numeris (BBM Canada), it offers a wide range of software applications and data to broadcasters and media agencies in Canada.

Audience Analysis:

A variety of software applications for analyzing meter and diary TV audience data at the respondent and summarized level such as Lens Viewer, InfoSys+TV and microTV. Tools are used in the planning, execution and reporting of TV campaigns as well as in the analysis of competitive activity.

CMR Commercial Tracking Service:

A database of TV GRP activity that allows client to analyze competitive campaigns. The database covers the activity of more than 900,000 brands and is available for the markets of Toronto, Montreal (F), Vancouver, Calgary and Edmonton.

Creative Tracking Services:

Access to creative for TV executions for historical TV campaigns.

Media Technology Monitor (MTM)

The MTM is Canada's premier research product in the area of overall technology ownership and use. Based on 12,000 telephone interviews annually (including a cellphone-only sample), the MTM has spoken with more than 100,000 Canadians over the past decade, making it the most comprehensive media technology tracking survey of its kind. The MTM provides valuable insight into consumer trends on existing and emerging technologies.

COMSCORE

90 Sheppard Avenue East, Suite 100
Toronto, ON M2N 3A1
Phone: (416) 646-9900
www.comscore.com

ComScore is a global leader in digital measurement and analytics, delivering insights on web, mobile and TV consumer behaviour that enable clients to maximize the value of their digital investments.

Through its Audience Analytics, Advertising Analytics, and Enterprise Analytics product suites, ComScore provides its clients with a variety of on-demand software, real-time analytics and custom solutions to succeed in a multi-platform world. The proprietary ComScore Census Network leverages a world-class technology

infrastructure to capture trillions of digital interactions a month and power big data analytics on a global scale. Combined with ComScore's panel of passively measured online Canadians, this provides a comprehensive picture of online activity.

Video Metrix is ComScore's end-to-end PC online video measurement solution. Video Metrix is able to report on video advertising and video content separately, while Video Metrix Reach/Frequency is also available to simplify the planning of online video campaigns, and to assess the best fit to reach a target audience.

SEEVIBES

3414 Avenue du Parc
Montreal, QC H2X 2H5
Phone: (514) 439-6909
www.seevibes.com

Seevibes is the leading provider of smart data targeting for efficient social media advertising. Based on billions of data points analyzed and enriched by Seevibes' exclusive technology, it aggregates all the knowledge about TV and brand engagement on social media in order to build smarter marketing.

Seevibes' mission is to help the top brands and media agencies target the most engaged profiles and build tailored audiences to improve Twitter Ads campaign performance—increased reach and lower cost of acquisition.

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NIelsen MEDIA RESEARCH

160 McNabb Street
Markham, ON L3R 4B8
Phone: (905) 475-9595
www.nielsen.com/ca

The Nielsen Company is a global information media company providing marketing and consumer information, TV and other media measurement, online intelligence and more.

Online Campaign Tracking:

Nielsen provides the media industry with a method to identify and measure audiences exposed to online advertising campaigns. Nielsen Online Campaign Ratings offers direct in-flight feedback and generates metrics similar to what is used for TV advertising. Online Brand Effects enables advertisers and publishers to measure and optimize online advertising in real time, while Sales Effect combines Nielsen Online ad-detection technology, offline behavioral purchase data and data partnerships to measure results and improve efficiency.

Competitive Intelligence Services:

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

Creative Tracking Services:

Nielsen provides copies of advertising executions from TV, radio and selected magazines and newspapers. For TV specifically, Nielsen monitors all major TV stations and specialty networks across the country.

Audience Analysis:

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

THINKTV (formerly TVB Canada)

160 Bloor St. East, Suite 1005
Toronto, ON M4W 1B9
Phone: (416) 923-8813
www.thinktv.ca

Building on the legacy of the Television Bureau of Canada (TVB), Thinktv launched in December 2015 as the organization's new brand identity reflecting its ongoing evolution, as well as its vision for the future. Thinktv is dedicated to promoting the benefits of television advertising to the marketing community and helping them use the power of television to drive business results. As a resource for advertisers and agencies, Thinktv will provide a broad spectrum of services to the marketing community including education, thought provoking and leading-edge research, as well as tangible insights on collected and curated data.

CANADIAN RADIO-TELEVISION AND TELECOMMUNICATIONS COMMISSION (CRTC)

Les Terrasses de la Chaudière
Central Building
1 Promenade du Portage
Gatineau, QC J8X 4B1
Phone: (877) 249-2782
www.crtc.gc.ca

The CRTC is an independent public authority that regulates and supervises broadcasting and telecommunications in Canada. Its website provides a wealth of information relating to TV trends, rules and regulations, financial statements, etc. In addition, it publishes myriad annual reports that speak to the television industry in Canada such as the Communications Monitoring Report, which provides an overview of the Canadian broadcasting industry.

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When it comes to ad format, screen size matters.

While you may have great creative, if it wasn't on TV, your audience likely missed the key moments.

Great creative can be very effective. It can elicit interest, brand loyalty, desire and, ultimately, a purchase. But on the wrong screen, that same great creative can fall flat.

That's because all screens are not created equal: different devices have different attributes. They play different roles in people's lives. And when it comes to advertising—or any content for that matter—the screen you're using has a major impact on your engagement. And yes, size matters—bigger is better—but it's more than that.

A new study from Thinktv and Brainsights used neuroscience to take a deeper look at the connections made—and the moments missed—on both large screens (TV) and small screens (laptops and mobile devices). In the study, 600 consumers wore headsets with sensors and watched shows and ads. However, 300 of them watched on TV, 150 on a laptop and 150 on a mobile device.

What did we find? That when it comes to the key drivers of consumer persuasion, attention, connection and encoding (to memory), almost all content performs better on TV.



NEUROSCIENCE YOU CAN USE

Here are just a few of the Brainsights findings that you can use to maximize your next video campaign:

1. Make sure your content matches your screen

If you have creative that's story-driven, visually complex or brand-focused, it needs to be on TV.

Story-Driven: We're more receptive to story-driven ads when we see them on TV because we're already using television to view that kind of narrative-based content.

Visually Complex: We're better able to engage with visual content—including landscapes and wide shots of people—when we watch it on TV. The big HD screen enables total engagement.

Brand-Focused: Brand-focused ads are right at home on TV where they drive higher attention and connection—up to 68% higher—than the same ads on laptops and mobile screens.

2. Some ads perform well on TV and digital screens

Benefits-focused ads and those with a simple call-to-action — "book now," for example—had similar encoding results whether they were viewed on the smaller digital screens or a more expansive television. So if you're working with a CTA that's short and to the point, you have plenty of options to get your message out.

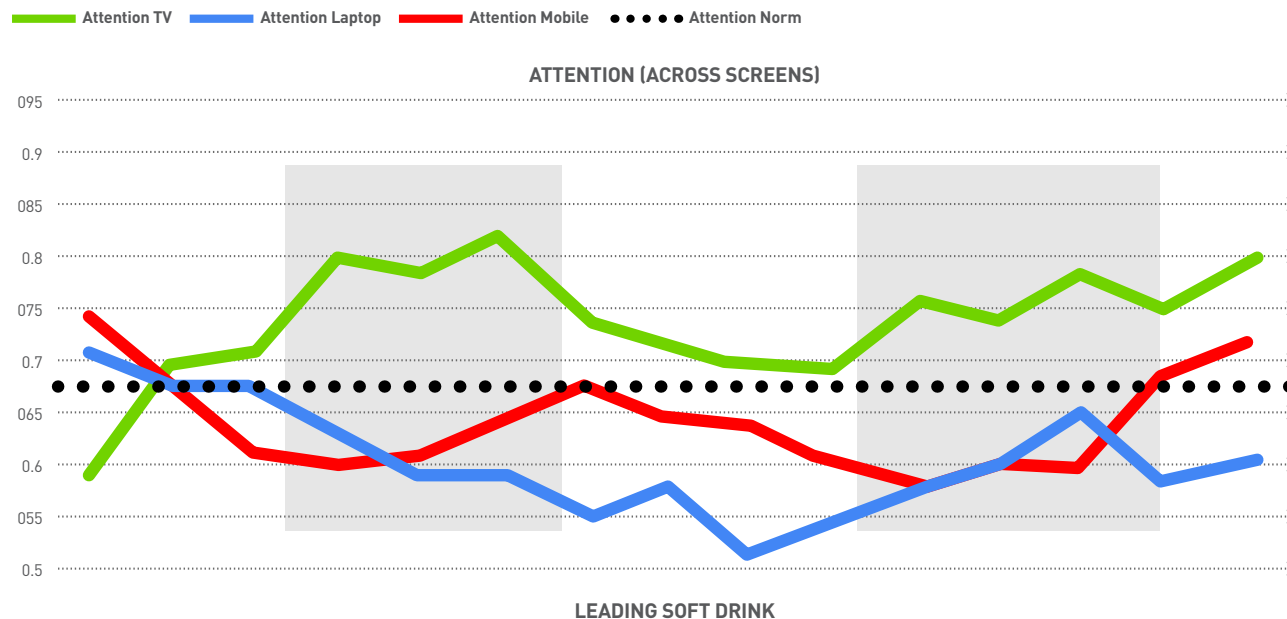
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3. No more missed moments

One of the most striking Brainsights findings was around “missed moments”—those pivotal points in an ad when attention drops out and the message is lost—when viewed on digital screens. Why do they happen? Because when an ad—no matter how good it is—is on the wrong screen, it doesn’t engage. And the fact is, there are far fewer missed moments on TV because it’s optimized for so many kinds of content, including story-driven, brand-focused and visually complex ads.

Centre of Attention:

This soft drink ad performed well on TV, but viewers using a digital screen missed key moments



4. Yes, bigger is better

TV screens are a big part of the reason why television drives more attention and connection to advertising: the large screen just does a better job of delivering visually complex material. But size is only one important element of a larger story. You also have to consider how we use television. It’s our go-to screen for entertainment and storytelling, and that has a direct impact on how receptive we are to a huge range of advertising and content.

So before you place your next media buy, there’s one question you should ask: if your ad is perfect for TV, shouldn’t it be on TV? ●

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THE “APPIFICATION” OF TV

Many have argued that we're now in the golden age of television.

TV is better than it's ever been, as the proliferation of cable and specialty channels, as well as high-quality scripted shows from the likes of HBO and Netflix, have spurred TV producers to up their games. The movement to Internet-based delivery means that the very definition of television has been morphed. A scripted TV show on one of our major TV networks is as easy to access as a video from YouTube sensation PewDeePie.

While the majority of video viewing still comes from traditional linear broadcast schedules, the amount of non-linear viewing from digital OTT sources may soon overtake the way we've historically watched television. Research from RealityMine's Touchpoints study confirms that a quarter of total video viewing comes from non-linear sources. For younger adults, half of their video viewing is non-linear.

The move from a strict viewing schedule on the living room television to one of self-curation across devices is the great equalizer. Independent and branded content can now appear alongside top-rated shows, allowing more new types of content of any length and format that are available anywhere, from the living room set to the phone to the tablet. This “appification of TV” will allow for new ad formats in the future, including shoppable branded content, direct response and mobile couponing.

The advertising ecosystem is evolving and the promise of buying audiences programmatically, with the same targeting and measurement capabilities as digital, is close at hand. In the U.S., Hulu and others are starting to bring interactive ads to living room platforms. Canadian suppliers are also working to upgrade their systems to offer the beginnings of programmatic TV.



Appification will provide many of the benefits of digital distribution, such as accurate real-time measurement and closed attribution loops, along with the huge potential audiences and attention of traditional TV. Brands should take advantage of the higher engagement level these formats bring with them by integrating YouTube celebrities and short-form and interactive video for both ads and branded content, which weren't possible within the restrictions of traditional TV. ●

COMMENTARY

People are listening to more audio, across more devices than ever before.

While radio tuning is still very healthy, taking the second-place position for overall time spent against the majority of adult demos, it does continue a slow decline. Audio streams like Spotify and Google Play Music are gaining reach and tuning, demonstrating that consumers are embracing the new audio options available through new technologies. The fact that many streaming services offer free subscriptions funded by advertising means that audio commercials are not the sole propriety of radio anymore. Consumers are moving to a dynamic audio environment, where they can get audio commercial messages across multiple channels, so agencies need to follow suit.



Not surprisingly, radio is losing some ground against millennials. However, it's not just because younger audiences are embracing the new audio or multi-media options. It's also likely because many markets do not have stations that service these demos since the bulk of advertising spending is purchased against A25-54 / A35-64.

Radio remains the only easily available audio option that can provide local surveillance like news, weather, sports and traffic. It also provides locally relevant celebrities who can draw and hold listeners in the form of its announcers. Radio has understood the benefit of these offerings to listeners and has been investing in them to provide a point of difference versus the "international" streaming services. However, radio will have to continue to reinforce its difference and local relevance as smartphones and streaming services develop surveillance apps and locally targeted geo/demo audio offerings as technology improves.

Current U.S. radio realities like sales automation and programmatic purchasing are expected to influence the Canadian market in the near future. In the U.S., online streaming services compete for a share of radio expenditures, as they are able to provide the desired audience information. Streaming services in Canada are actively working to provide this granularity of data so that they too can be considered for "radio" buys. Programmatic radio buying is a reality in the U.S. too through software like Jelli. If it is possible across the border, you can bet that the Canadian industry is also investigating the option here.

Radio remains healthy within the overall new audio category, both from a tuning and revenue perspective. It survived and thrived after the launch of television, the Walkman and the Internet. It will need to continually evolve to maintain share of both advertising revenue and audio tuning. ●

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Contributed by
David McDonald,
VP, Director of Radio Investments, Magna Global,
a division of IPG Mediabrands

Radio is alive and well and thriving.

- Radio is everywhere and reaches the vast majority of Canadians. Its reach of the population is holding with the exception of the younger demos where it is trending down slightly. Listeners use radio wherever they are.

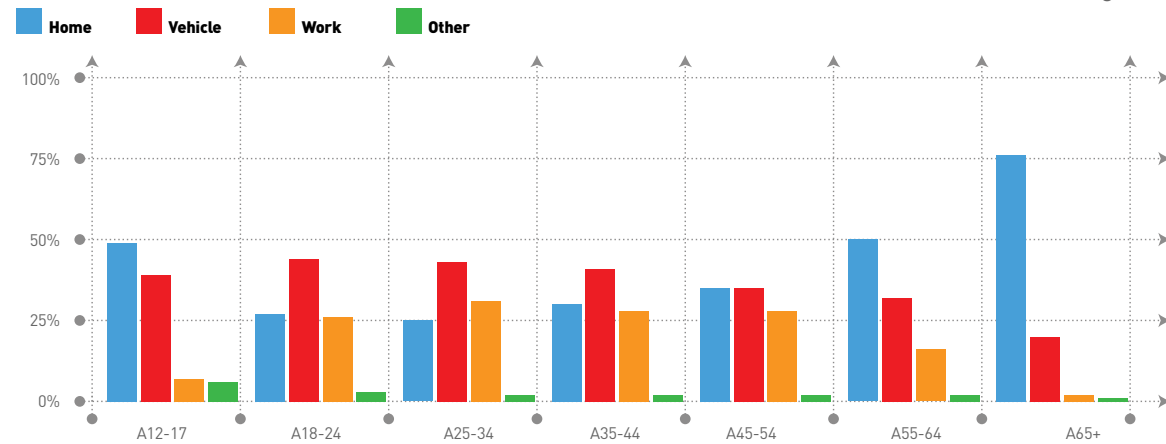
[Figures 1 & 2]

- Radio is on and is used throughout the entire day, with peaks in the morning and evening as commuters travel to/from work. [Figure 3]
- Amongst those 25+ radio is second in terms of 'yesterday' exposure (behind TV) while still retaining the third highest exposure amongst younger audiences. [Figure 4]
- Advertisers recognize radio's ability to reach consumers, making it a \$1.6 billion dollar industry with consistent demand, especially in the major markets. However, revenues are projected to drop slightly moving forward. [Figure 5]

% of Tuning by Location

Radio is switched on, wherever consumers are

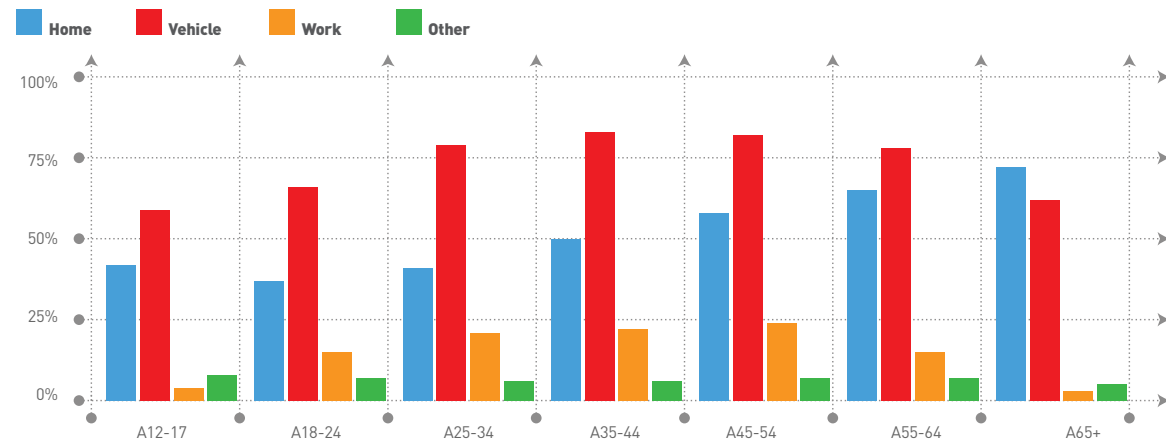
[Figure 1]



Demo Reach by Tuning Location

Radio listening matches lifestyle and lifestage

[Figure 2]



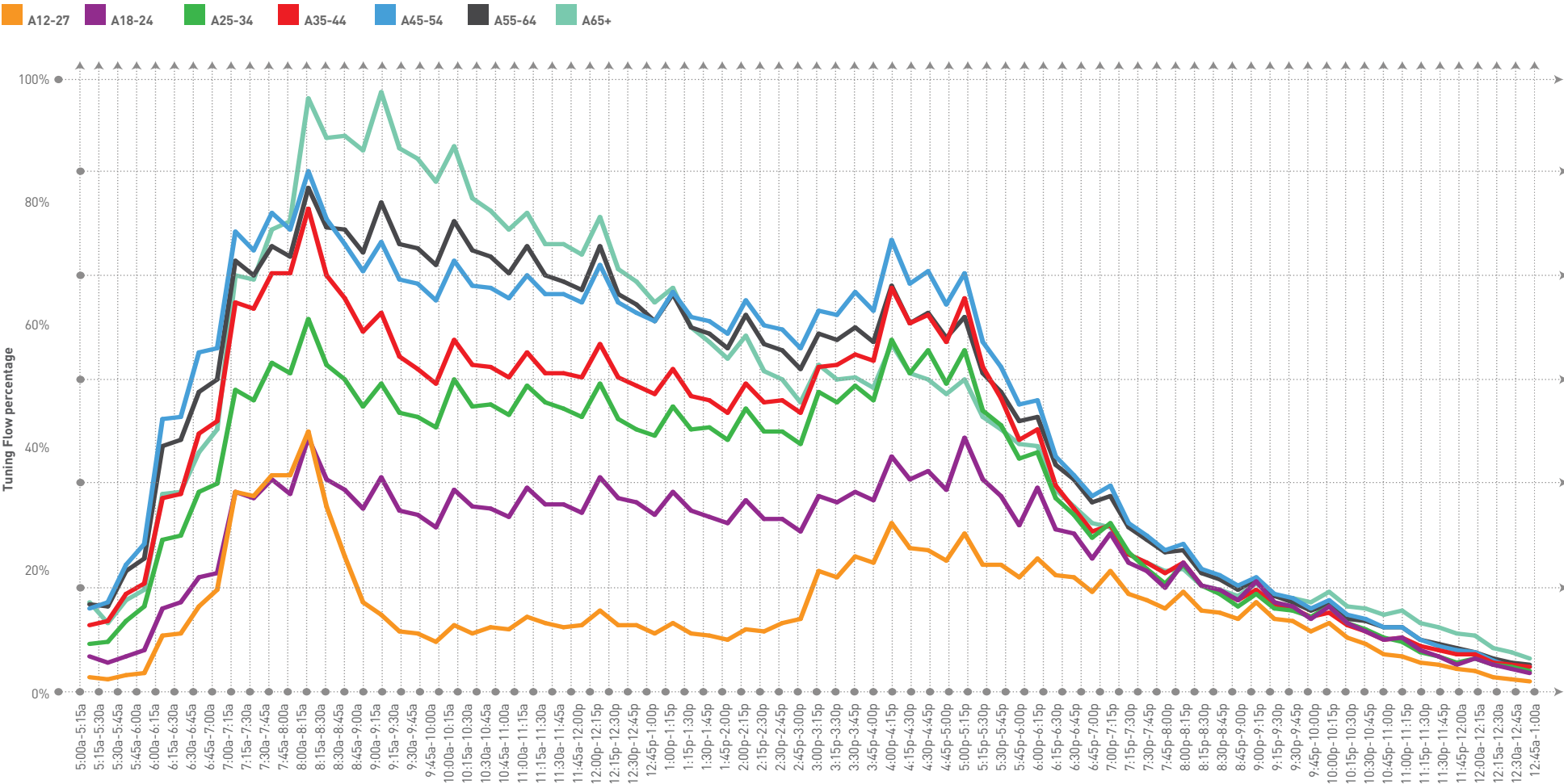
Source: Numeris Fall 2015 (total Canada)

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Tuning Flow by Demo Throughout the Broadcast Day

Radio tuning peaks with morning and evening commutes

[Figure 3]



Source: Numeris Fall 2015

Historical Revenue

[Figure 5]

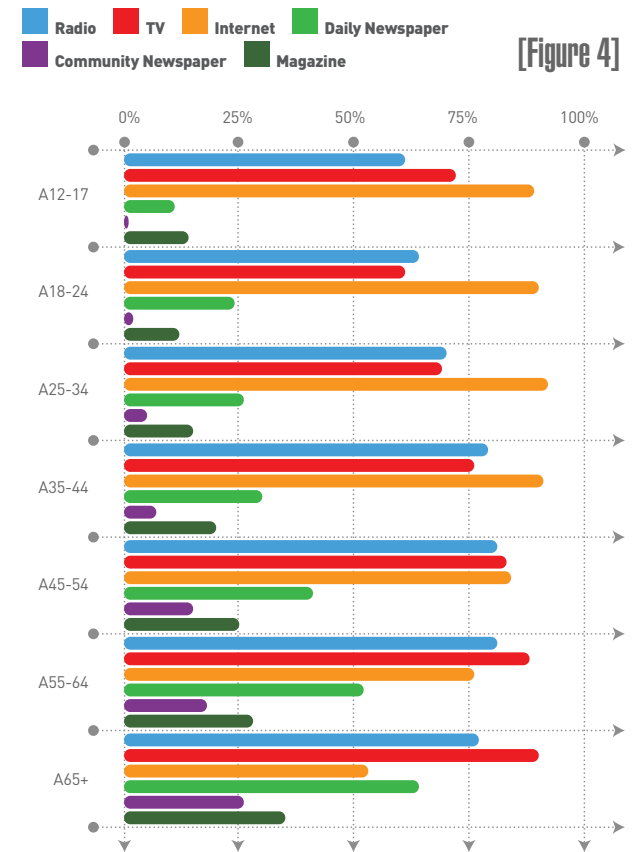
		Historical Revenue (000)						
REVENUE STREAM		2011	2012	2013	2014	2015		
Local Sales	AM	\$245,850	\$244,009	\$236,447	\$225,115	\$216,317		
	FM	\$888,275	\$887,161	\$887,022	\$866,274	\$850,769		
National Sales	AM	\$55,111	\$52,447	\$50,680	\$58,789	\$62,746		
	FM	\$387,174	\$401,468	\$425,606	\$438,650	\$446,009		
Network Payments	AM	\$0	\$0	\$0	\$0	\$0		
	FM	\$0	\$0	\$678	\$0	\$0		
Syndication-Production	AM	\$811	\$1,069	\$637	\$916	\$1,059		
	FM	\$5,044	\$2,785	\$2,375	\$5,223	\$5,096		
Grants	AM	\$0	\$8	\$10		\$0		
	FM	\$108	\$86	\$132	\$124	\$159		
Other	AM	\$9,290	\$8,666	\$6,851	\$6,083	\$5,840		
	FM	\$22,176	\$20,729	\$12,220	\$12,983	\$14,539		
TOTALS:	AM	\$311,061	\$306,199	\$294,625	\$290,903	\$285,962		
	FM	\$1,302,778	\$1,312,229	\$1,328,034	\$1,323,255	\$1,316,572		
Grand Total		\$1,613,839	\$1,618,427	\$1,622,658	\$1,614,158	\$1,602,534	2016 \$1,590,993	2017 \$1,579,536

Projected (000)

Source: CRTC Annual Report (2011–2015) and MAGNA Estimates (2016 & 2017)

Yesterday Exposure to Media

The majority of Canadians have listened to the radio recently i.e. yesterday. Radio is #2 for most of A18+



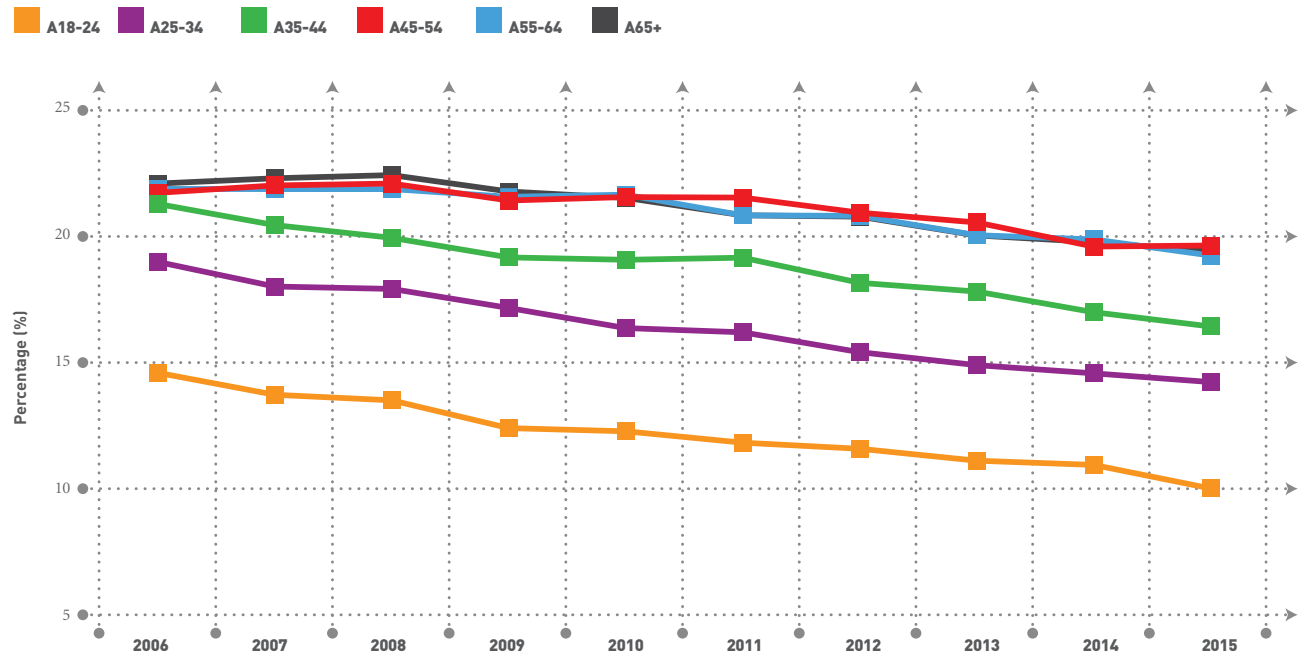
Source: Numeris RTS, Spring 2016 (total Canada)

Changes in Tuning: More Audio Options and Declining Tuning to Radio

It is no secret radio tuning has declined slightly, especially against teens and young adults. While technology and alternate forms of listening are having an effect, they are not the only contributing factor. Many markets do not have a population base large enough to support a “youth” skewed station, simply because the advertising revenue does not target those demographics and will not support the revenue required by those formats

Radio tuning is not necessarily going to “other” media. MTM suggests that it may simply be shifting and is being captured by online audio options.

Weekly Average Hours Tuned: By Age Demographic



Source: Numeris Fall Surveys (total Canada)

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A MULTITUDE OF PERSONALIZED AUDIO STREAMING OPTIONS AVAILABLE IN CANADA

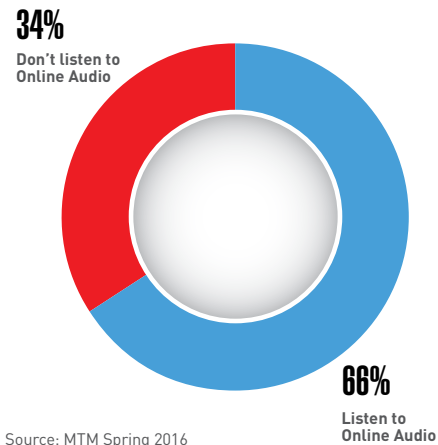


There are more audio options than ever before. If a consumer wants to listen to music, the news or other audio content, they can choose between the traditional radio transmitter, streaming radio online, downloading a podcast or using one of a multitude of personalized audio streaming services.

Online audio options are gaining traction. According to MTM (Spring 2016), 66% of Canadians 18+ are listening some kind of online audio on a monthly basis.

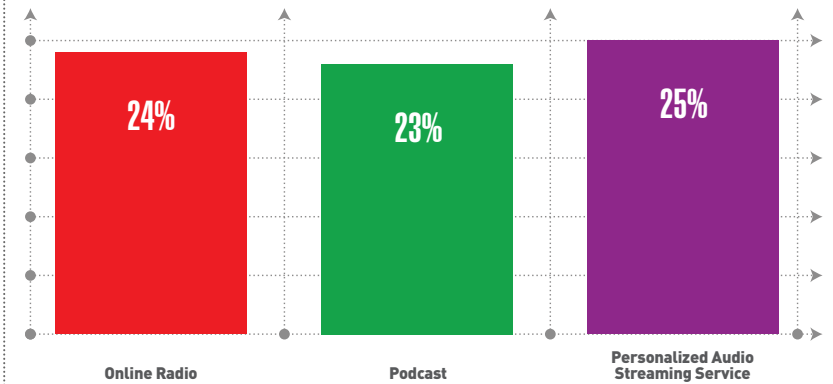
In the last five years, the percentage of Canadians streaming online radio has increased 20%. Podcasting has jumped more than 75% and usage of personalized audio services has increased dramatically, climbing more than 275%. The popularity of these online audio options is only expected to continue to increase in the future.

Canadian Online Audio Listeners



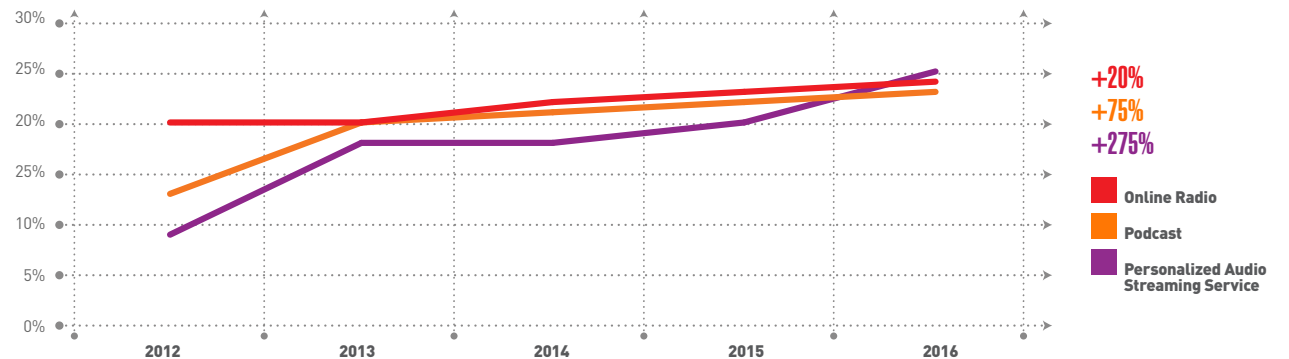
Source: MTM Spring 2016

Canadians Using Each Online Audio Type



Source: MTM Spring 2016

Canadians Using Each Online Audio Type — 2012 to 2016



Source: MTM 2012–2016

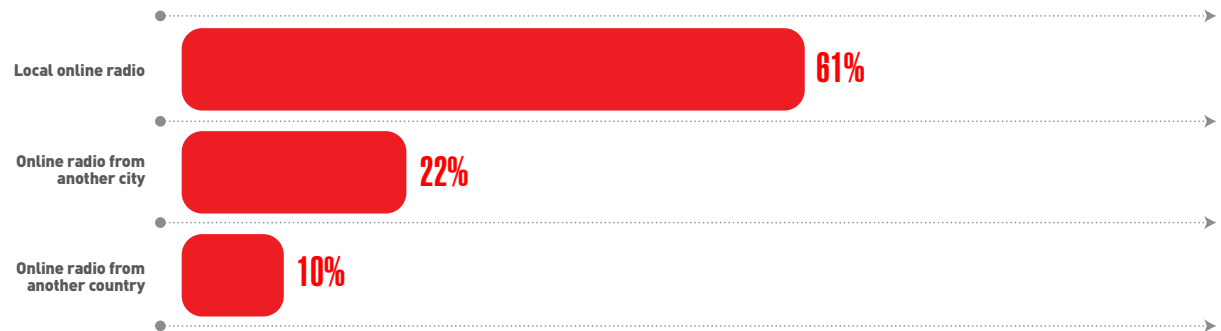
The ability to stream radio online opens up a world of radio options, literally. However, the majority (61%) still choose to stream radio stations from their local area.

There is a huge range of personalized audio services available in Canada. The majority of Canadians use YouTube and much of that is for viewing or playing music. Of the audio services, Spotify has replaced Songza as the most popular, followed closely by Google Play Music. Spotify has only been in Canada since fall 2014, but already more than a third of the population is tuning in.

Many audio streaming services are consistently developing new ways to advertise to consumers via their platforms—from integrated audio ads to banners on apps to playlist sponsorships. Media agencies need to keep up to date with these offerings and must educate clients of the importance of thinking beyond the 30-second spot—there are many opportunities to exploit in this new audio world. For now, these offerings currently play in the digital world, but that will likely change within the next year as audio services develop methodologies to geo/demo target and report delivery via ratings. This is a key element that radio will have to address in its bid to stay current and relevant to its listeners, especially younger demographics, and still be meaningful to advertisers.

Online Radio Sources

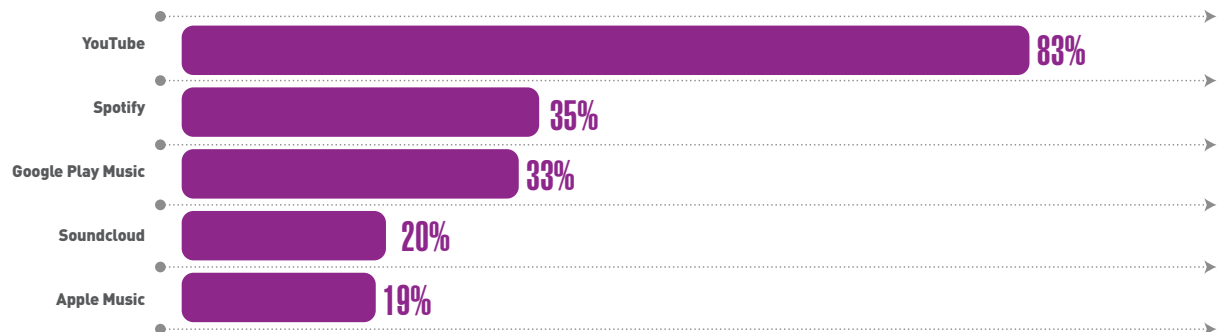
Despite having a world of stations to choose from, most Online Radio listeners stream local stations



Source: MTM Spring 2016. Base: Total Canada, listened to AM/FM radio online past month.

Top Five Most Used Audio Streaming Services

Spotify is the most tuned audio streaming service



Source: MTM Spring 2015
Add: Base: Total Canada, listened to music streaming service past month

Changes in Tuning: Advantages in the Shift From Radio to Audio

It's important to note that the introduction of more and more audio options does not spell the end for traditional radio. Far from it! In fact, there are three huge advantages in this shift from considering radio only to an "audio environment."

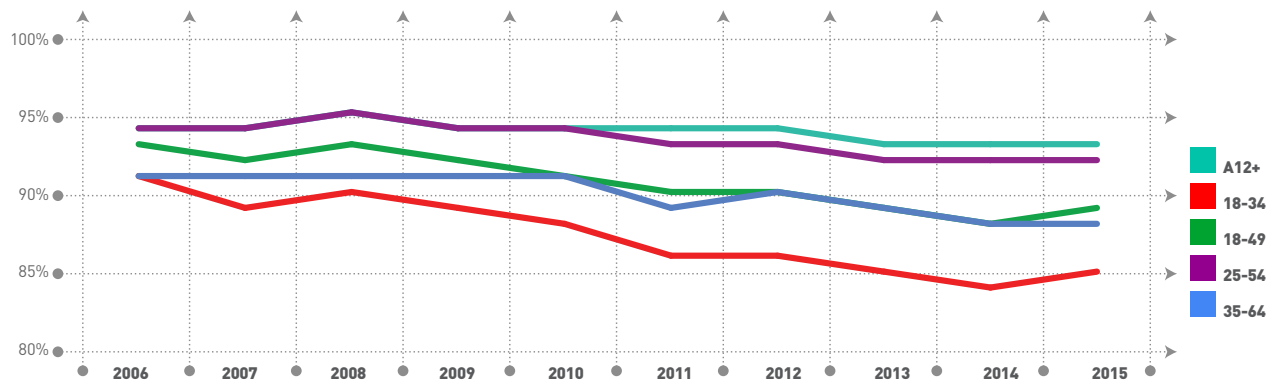
1. ONLINE AUDIO IS CAPTURING AUDIENCES FOR WHICH RADIO IS LOSING GROUND

With weekly radio reach generally around 90%, it remains a medium that is enjoyed by all ages. However, data trends inform us that the demographic with the biggest declines in reach is millennials 18-34. This is exactly the audience for which online audio is most relevant and exciting. In fact, 37% of those listening to online audio are 18-34, whereas only 25% of radio listeners fit in the same age group. Together, radio and online audio offer efficient opportunities to reach all demographic groups.

Radio needs to reconnect with, or re-interest millennials. There is no guarantee that as they age, they will discover that radio is relevant to their lifestyle. Millennials have grown up controlling their own media choices and what audio they receive.

Radio Reach by Demo: 10-Year Trend

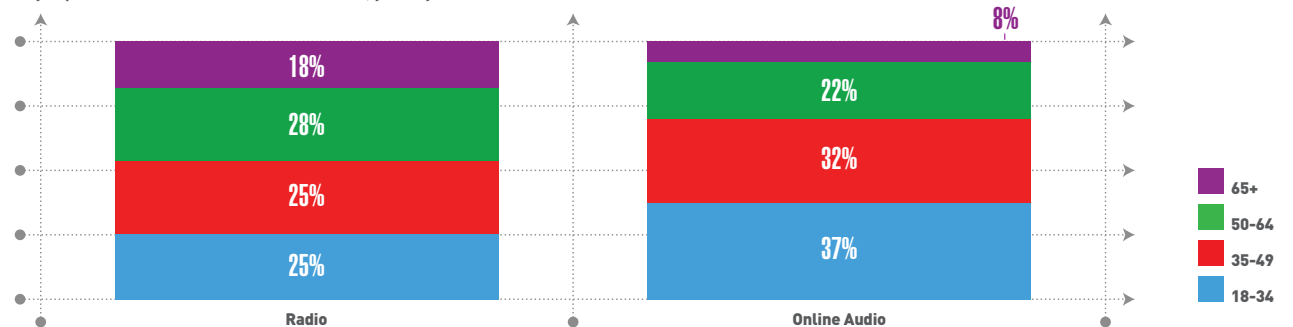
Radio still has significant reach, lowest amongst millennials — but that appears to have stabilized



Source: Numeris Fall Surveys (total Canada)

Radio and Online Audio Listeners by Age

Only a quarter of radio listeners are millennials, yet they make more than a third of online audio listeners



Source: MTM Spring 2016

2. CONSUMERS ARE LISTENING TO MORE AUDIO THAN EVER

Across all demographics, the time spent with radio is in decline, down 10% from 12 hours in 2012 to 10.8 hours in 2016. However, the popularity of online audio options means that total listening time has actually increased by 5% since 2012. As a result, Canadians are listening to 16.5 hours of audio in an average week. Time spent listening to online audio has increased by 54% from 2012–2016, and it is expected to continue to increase in the future.

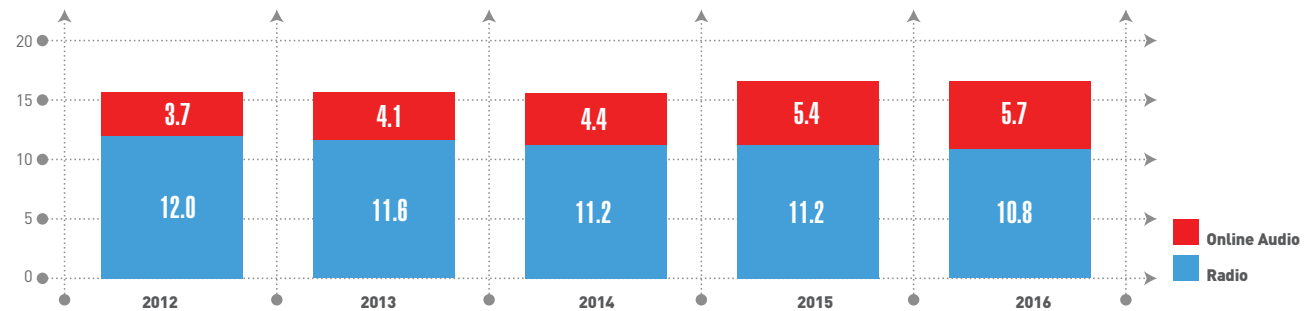
3. NO LONGER TIED TO THE RADIO SET/ TRANSMITTER

Radio listening has been traditionally tied to a radio transmitter/receiver—often at home, at work or in the car. Now, with the introduction of online audio options, audio has become increasingly mobile. Consumers are now using multiple devices to listen to audio content when and where they like.

The computer and smartphone are the most used devices for online audio listening. This opens up interesting opportunities for advertisers who must evolve their thinking about how and when audio is consumed and what else can be done to connect with target audiences “around” its delivery channel.

Hours Listened to Radio and Online Audio Per Week Trend

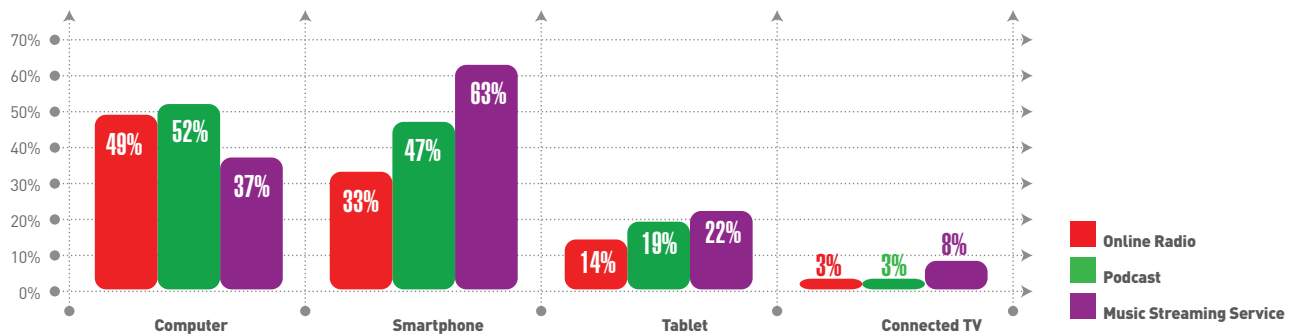
Time listened to traditional radio is on the decline, but the popularity of online audio means we're listening to more audio than before



Source: MTM 2012–2016

Devices Used to Listen to Each Online Audio Type

Online audio is most likely to be consumed on a PC or smartphone, meaning consumers are no longer tied to the radio



Source: MTM Spring 2016

THE BENEFITS OF RADIO

Radio offers advertisers a number of benefits. PPM measurement has demonstrated that it is both a reach and a frequency medium. In a broadcast environment where many television stations are regional, provincial or national in their reach, radio remains a truly local medium. It can be purchased by demographic and can be targeted psychographically by selecting the appropriate formats.

Radio is immediate and close to the point of purchase. It costs less too. On a market-by-market basis, it costs far less than television. Creative production costs are far lower than for TV too and in many cases are negligible, especially if the stations purchased produce the commercials. Because creative is inexpensive, multiple executions and time sensitive spots can be scheduled.

RADIO MEASUREMENT IN CANADA

Canada is in a very good position to keep track of traditional radio listening with one of the strongest audio measurement systems in the world. The Numeris PPM is carried by a panel of Canadians in major markets across the country and passively monitors both their radio listening and TV tuning throughout the day.

Marketers, agencies and programmers can analyze major market local radio listening patterns on a minute-by-minute basis. Local, smaller markets are measured via diary methodology, a blunter instrument that provides quarter-hour audience levels.

While the PPM is technically capable of picking up any audio signal from any device, the “long tail” of audio listening makes panel measurement, via PPM, impractical. Add to that the complexity of encoding every station that Canadians listen to, offline and online, and this measurement approach is not feasible.

To get a proper representation of the audio listening universe, the industry will require measurement from several angles, including panel measurement, listener surveys, streaming data and geo/demo reports from online streamers. Numeris is actively exploring all measurement methodologies through its newly formed Innovation Lab. Personalized audio services will also need to become more accountable for providing demographic and lifestyle data for their listeners as advertising opportunities on these platforms grow. As listening options for Canadians morph, our measurement approaches will have to adapt to keep pace.

THE FUTURE OF RADIO

Consumers are expected to increase their familiarity and usage of online audio and continue to incorporate it into their daily media habits. In this Wild West environment where multiple operators are attempting to stake their claim to eyes and ears, there is wealth of options available. As they are sampled and loyalties develop, some will fall by the wayside and dominant operators will arise. And advertisers will want to be where the listeners are.

Radio will continue to have a significant presence in consumers' lives. How it is programmed and presented to the marketplace will evolve as it has since television launched. In fact, evolution will be more important

than ever to its continued health. How it stays relevant to, and connects with millennials is going to be its biggest challenge and opportunity.

In the U.S., radio budgets are being proportioned to include online audio streams and programmatic purchasing. There, what used to be funded by three separate streams is now often being funded by what was once the sole territory of radio.

While there is pressure for that “audio” model of online and on-air to be adopted north of the U.S. border, Canada is close to having that happen, with Spotify leading the way. The simplest ways for online streams to compete for radio dollars would be for the online providers to become members of Numeris by encoding their streams or developing an accepted methodology where they can geo and demo target and report deliveries. Radio campaigns are still purchased on demographic rating points, defined by and targeted to specific geographies. That level of granularity and audience data will likely soon be available here and online audio streams will soon compete for “radio” dollars.

Programmatic radio buying is still pending in Canada. Based upon its success in the U.S., many agencies and broadcasters have entered discussions about making it a reality. At this point, a way to easily manage the process like the U.S. does through Jelli does not exist here. That will change. It is coming and its implementation will hinge on the availability of an accepted management system. It is expected that as soon as one broadcaster enters into an agreement to offer their inventory programmatically, others will also find a way to make it happen. ●

BROADCAST COMMERCIAL ACCEPTANCE

Reviewed by
Edith Cayer,
Executive Producer, DentsuBos

The Telecaster Committee of Canada (now known as Telecaster services of TVB) was formed in 1973 by private broadcasters as a voluntary, self-governing, commercial, infomercial and public service announcement (PSA) clearance committee. The Committee has grown steadily in membership since that time, proving to be an organization that inspires responsibility and trust.

Every version of every commercial, infomercial and PSA requires its own Telecaster approval number. This means that every 800 number, tag, donut, etc. must obtain its own Telecaster number. If the content of a commercial changes at all, be it a technical revision (i.e. revision to legal super) or a logo change, this new version will also require a new Telecaster number.

GENERAL RULES

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

1. All TV commercials on Telecaster member stations should have Telecaster approval. Please check with the Telecaster Services of TVB for guidelines, rules, regulations and associated costs. Go to: www.tvb.ca.
2. Advertising Standards Council (ASC) reviews all alcohol, children's advertising, cosmetic, food/non-alcoholic beverages, and prescription and non-prescription drug advertising (including natural health products) directed to consumers. ASC Clearance Services analysts provide expertise across all five areas, providing advertisers with the confidence that their advertising messages comply with applicable legislation, codes and guidelines. Go to www.adstandards.com for more information.

TELECASTER CATEGORIES WITH SPECIFIC RULES

1. Telecaster will review a script/commercial that is child-directed but will not assign a clearance number until the ASC provides a "kids" pre-clearance number and all other requirements for Telecaster Clearance have been met.
2. All food and non-alcoholic beverage advertising must comply with the Guide to Food Labelling and Advertising, plus the Food & Drugs Act and Regulations.

3. All beer and alcohol advertising must comply with the Canadian Radio-Television & Telecommunications Commission (CRTC) Code for Broadcast Advertising of Alcoholic Beverages.
4. All infomercials must receive clearance from Telecaster. There are specific guidelines to follow vis-à-vis visual content, disclaimers etc. All advertisers must comply with the Code of Ethics and Standards of Practice of the Canadian Marketing Association.
5. Closed captioning and "billboard" messages are cleared by the individual networks/stations. The exception to the rule is when the CC or "billboard" message contains a sell line, special offer, sales or product cost. In this case, these spots will require Telecaster clearance.
6. All commercials pertaining to gambling (Canadian Indian reserves, bingo parlours, legitimate gambling casinos, provincial lottery corporation products, home/hospital lotteries) are contingent on the Criminal Code (both federal and provincial) and the provincial licensing laws. An indemnity letter from the advertiser is required by Telecaster stating their advertising is treated separately by Telecaster and requires an "undertaking letter" from the advertiser and a Canadian legal opinion letter, per point four of the undertaking letter.
7. Personal products (feminine hygiene, laxatives, personal lubricants and hemorrhoid treatments) must also comply with Telecaster approvals. Due to the sensitive nature of these products, there may be scheduling restrictions.

8. Direct response commercials that advertise the price of the product or service advertised must clearly show the type of funds (U.S. or Canadian), applicable taxes and shipping and handling. If there is a money-back guarantee and the consumer must pay for return shipping, the addition of a video super indicating "Less S+H" is required. Compliance with Phone Service Guidelines is also mandatory, as well as all other Telecaster guidelines.
9. Phone service commercials (such as adult chat lines and all online dating services) must follow the Phone Service Guideline in addition to all other appropriate Telecaster Guidelines.
10. Comparative advertising must follow the Comparative Advertising Guideline in addition to all other appropriate Telecaster Guidelines.
11. Contests and prizes must abide by Canadian laws. Telecaster will require a letter from the advertiser/agency confirming that positive legal advice was obtained.
12. Election advertising must clearly identify the person, corporation, trade union, registered party or registered constituency association paying for the commercial over a minimum of three seconds.
13. Issue and opinion advertising also has a number of criteria to follow. All must have Telecaster approval.
14. Text message commercials must follow the Text Message Guideline in addition to all other appropriate Telecaster Guidelines.
15. High-definition (HD) commercials and standard definition (SD) commercials must be assigned individual Telecaster approval numbers. When making an SD and an HD submission, Telecaster only needs to view the HD version, per the Telecaster High Definition Guideline.
16. By direction of the CRTC, closed captioning is required on all advertising material and sponsorship messages and promos must also be closed captioned as of Sept. 1, 2014.

GOVERNMENT ORGANIZATIONS

Canadian Radio-television and Telecommunications Commission (CRTC)

The CRTC is an independent organization vested with the authority to regulate and supervise the Canadian broadcasting system, with a view to implementing the Canadian broadcasting policy set out in the Broadcasting Act. The CRTC also regulates the telecommunications industry under the Telecommunications Act.

For alcoholic beverage advertising, compliance with the Code for Broadcast Advertising Alcoholic Beverages is required by regulation for all radio and television broadcasting stations and specialty services in Canada. Pre-clearance is performed by independent agencies recognized by the CRTC.

CONTACT:

Toll-free: 1-877-249-CRTC (2782)
Outside Canada: (819) 997-0313
Toll-free TTY line: 1-877-909-CRTC (2782)
Outside Canada (TTY line): (819) 994-0423
Media Inquiries: (819) 997-9403
www.crtc.gc.ca

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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.

For more information, go to <http://hc-sc.gc.ca>.

For pre-clearance see separate listings:

Consumers:

Non-prescription drugs and natural health products:

ASC, Extreme Reach Canada Clearances

Prescription drugs and educational material:

ASC, PAAB

Health Professionals:

All products: PAAB

PRE-CLEARANCE ORGANIZATIONS**Advertising Standards Canada (ASC)**

Advertising Standards Canada is the national not-for-profit advertising self-regulatory body. Founded on the belief that advertising self-regulation best serves the interests of the industry and the public, ASC is committed to fostering community confidence in advertising and to ensuring the integrity and viability of advertising in Canada through responsible industry self-regulation.

The Canadian Code of Advertising Standards (the Code) sets the criteria for acceptable advertising and is the cornerstone of advertising self-regulation in Canada. Administered by ASC, the Code is regularly updated to ensure it is current and contemporary – keeping pace with consumer and societal expectations. It contains 14 clauses that set the criteria for acceptable advertising that is truthful, fair and accurate:

- Accuracy and Clarity
- Disguised Advertising Techniques
- Price Claims
- Bait and Switch
- Guarantees
- Comparative Advertising
- Testimonials
- Professional or Scientific Claims
- Imitation
- Safety
- Superstition and Fears
- Advertising to Children
- Advertising to Minors
- Unacceptable Depictions and Portrayals

These clauses form the basis for the review of consumer and special interest group complaints, and trade disputes.

Pre-clearance services are available in five regulated advertising categories including:

- alcoholic beverages
- children's
- consumer drugs and natural health products
- cosmetics
- food and non-alcoholic beverages

ASC Clearance Services analysts provide expertise in both official languages.

For more information, go to www.adstandards.com.

Toronto Office

Advertising Standards Canada
175 Bloor St. East, South Tower
Suite 1801
Toronto, ON, M4W 3R8
Tel: (416) 961-6311
Fax: (416) 961-7904
nicole.bellam@adstandards.com

Montreal Office

Les normes canadiennes de la publicité
2015 Peel Street, Suite 915
Montreal, QC H3A 1T8
Tel: (514) 931-8060
Fax: (877) 956-8646
danielle.lefrancois@normespub.com
www.normespub.com

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Extreme Reach Canada Clearances

Extreme Reach Canada Clearances is a for-profit bilingual advertising clearing house. It provides copy review and assigns clearance numbers to acceptable copy. Extreme Reach Canada Clearances reviews both English and French materials under applicable acts, codes and guidelines in the following categories:

- food and non-alcoholic beverages
- alcoholic beverages
- cosmetics
- consumer drug products
- natural health products

Contact:

635 Queen Street E.
Toronto, ON M4M 1G4
Phone: (416) 964-7539
Toll free: 1-800-387-0644
clearancescanada@extremereach.com

CLEARANCE ORGANIZATIONS**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 is 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 Services recommends that scripts or storyboards be submitted via the Telecaster Online System at www.tvb.ca "Telecaster Login" 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. For more information, go to tvb.ca/pages/TCEIntro.htm.

CONTACT:

Television Bureau of Canada
Telecaster Services
160 Bloor Street E., Suite 1005
Toronto, ON
M4W 1B9

Phone: (416) 923-8813
Fax: (416) 413-3879
tvb@tvb.ca
www.tvb.ca

Pharmaceutical Advertising Advisory Board (PAAB)

The PAAB is an independent review agency whose primary role is to ensure that health-care product communication is accurate, balanced and evidence based, and reflects current and best practices. The scope of PAAB includes promotional health-care product communication for prescription, non-prescription, biological, vaccines and natural health products directed to health-care professionals in all media. PAAB also provides advisory comments on direct-to-consumer materials for prescription drugs and vaccines in all media. PAAB advisories for television ads are recognized by the CBC and Telecaster. For more information, go to www.paab.ca.

CONTACT:

Pharmaceutical Advertising Advisory Board
1305 Pickering Parkway, Suite 300
Pickering, ON L1V 3T2
Phone: (905) 509-2275
Fax: (905) 509-2486
www.paab.ca

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Good Branded Content = Good Advertising

There are three roles for content. That's it.

1. Own an audience
2. Reach an audience
3. Share an audience

OWN AN AUDIENCE

This is the “brand as publisher” model that was once heralded as the answer to building long-term brand-love that could translate into loyalty and sales. It is campaign agnostic. It is ad blocker-proof. It is regularly scheduled. It is prolific. It is often niche. It is always on. It is also almost impossible for most brands to execute. They simply aren't organized to operate as publishers or compete for share of voice amid the infinite amount of content already online.

There are notable exceptions, but for the most part, this is about a much smaller, higher-value audience. You can't expect to compete for a broad popular audience—brands don't stand a chance against publishers with business models designed to do that. Red Bull is the example most frequently given about a “brand as publisher” doing it well. But for me, that's a lazy example that sells a dream that is no longer available.

Digital, social and content are very different in 2016 versus when Red Bull actively started with a publisher strategy



more than a decade ago. Instead, we should look at the success of brands like Amex, which identified the support of small businesses as a specific content niche they could speak to credibly, and launched the Open Forum program. Or Marriott, which successfully identified rare whitespace for travel entertainment content.

REACH AN AUDIENCE

Because few brands make very good always-on publishers, for most marketers, successful branded content will simply be an extension of, or indeed the primary element of, a campaign. To be most effective, it will have the same look and feel, tone and language as the campaign overall.

All the things we have learned about successful advertising campaigns will ring true here. It will be more brand than product-focused and will avoid any hint of a direct sell. But it will be designed to reach a volume of audience that will make a meaningful difference. It may be an extension of a traditional element of the campaign, or it may be using content to reach an element of the audience that is difficult to reach elsewhere.

It will be a burst rather than “always on.”

The branded content work that garners significant attention from our industry is “content as advertising,”

which is developed to reach a wide audience, and shares the metrics the industry is comfortable with: shares, views, and even reach.

The “Friends Furever” Android campaign was the most shared content in 2015. It was aligned with a broader overall campaign that appeared across many other media. Another example is P&G's “Like a Girl” from Leo Burnett Toronto, which started as a powerful three-minute digital piece of content that was formatted for TV.

SHARE AN AUDIENCE

The final role for content is sharing an audience. While most brands don't make very good publishers, they can benefit from aligning with publishers that do the job well and share their audience, adding credibility and an authoritative voice to the brand's message. They do this by integrating into sought-after content, sponsoring content, and creating co-branded content with publishers.

The partnership can be “always on” like Canon and Blue Ant Media's RoamNewRoads.ca venture, or in a burst like Whiskas and BuzzFeed Canada's Cat Events that was planned around the Rio Olympics. The challenge is to find that perfect balance of publisher voice and brand voice that resonates with the audience.

BRANDED CONTENT TRENDS

Augmented Reality

As I write this, Pokémon Go has become the most popular mobile game in history—less than two weeks after its launch. In terms of app downloads, it has beat Tinder

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already and is about to top another AR favourite—Snapchat. Between Go and Snapchat, it's fair to say that augmented reality (AR) has finally hit the mainstream.

Virtual Reality

This is the year that virtual reality (VR) will really hit the mainstream and brands will find more ways to tell exciting stories in this environment. For many years, VW was a Discovery Shark Week sponsor, culminating in a VW beetle with a shark cage frame, driving along the ocean floor. Imagine evolving this idea into VR!

360 Video

360-video, with or without VR, will also continue to grow as an exciting new storytelling platform for branded content. Download the Google Spotlight App and watch the Cannes Creativity Award-winning Help! to inspire your thinking on the potential of 360.

Live Streaming

Last year, the talk was all about live content with Meerkat and Periscope launches. Since then, Meerkat has announced that it is getting out of the live-streaming game. It was just too hard to compete with the power of Twitter's Periscope and Facebook. Facebook in particular is making a bold play in the space, attracting users by paying celebrities and top publishers to create content. As marketers start experimenting with live, they should follow one rule: make sure there's a real reason the content needs to be watched as it happens. ●

This Article is Brought To You By...

In an ever-increasingly digital and fragmented media world, there is one traditional medium that continues to be an impactful tool in a marketer's arsenal: sponsorship. And the opportunities continue to grow. But how do brands decide which one is right for them? This past summer alone featured two major global events, the Summer Olympics and the Euro Cup.

Sponsorship marketing is at its most effective when it involves a property that truly links to a specific brand value and it's a shared passion between the brand and the consumer, such as Molson Canadian and hockey, Virgin Mobile and music, Air Canada and *Amazing Race Canada*, or GE and the NBA health-care initiative. Once a brand determines the right event, cause or program to sponsor, the next step is to enhance the consumer experience around the property.

Most marketers usually default to VIP experiences that 99.9% of consumers won't even see or be able to participate in and most brands could execute. Sponsorship is at its best when it features activations that intrinsically tie your brand to the property so another brand can't replicate it, thereby elevating a consumer's experience with the sponsored property.



With more and more events popping up each year, property owners are always on the hunt for sponsors.

This gives marketers amazing leverage to tailor packages and activations that truly bring a brand message to life in unique and engaging ways. It can be as simple as creating the perfect selfie backdrop or it can be more involved. For example, L'Oréal (a MEC client) activates around red carpet arrivals. Knowing their consumers' passion for fashion, they take the hottest looks from the event, and in real-time during commercial breaks, air branded interstitials featuring their make-up artists, educating viewers on how to achieve the look they just saw on their favourite celebrity.

With any branded sponsorship experience, one of the most important things a brand can do is share it outside the physical confines of the event itself so it can reach the many versus the few. Most marketers tend to use the same approach by building a piece of content, usually a wrap video of what the brand did at the event, and then push it out on all of their socials. Please don't do this. This is essentially the equivalent of asking a consumer to watch a video of a party that they weren't invited to.

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The great thing is that technology can enhance the experience for the people at home as well, in ways we've never seen before. A great example is the Visa 360 video experience at the Rio Olympics, which allowed viewers sitting on their couch to transport themselves to front-row seats at beach volleyball matches or track and field events. This is a much more impactful and engaging execution for the brand versus a run-of-the-mill, slap-your-logo-here Olympian profile we've seen a million times from a million brands.

If a brand is considering sponsoring an event that takes place over an extended amount of time such as the Olympics, the World Cup or a season-long sports team/league, there are some "watch-outs" to consider. The Olympics has essentially become a 24/7 multi-channel, multi-platform behemoth. This means that a sponsorship is going to come with a lot of media inventory, which can be a blessing or a curse for a brand. If you're a Toronto Raptors fan and you watch a significant number of the 82 games they play each season, you don't want to see the same ad over and over again. We've all been there: that moment where the same commercial comes on for the umpteenth time and you literally begin cursing the brand. These types of sponsorships require a lot of pre-planning and the financial commitment to produce the optimal amount of creative to keep messaging fresh, avoid wear-out and most importantly, keep consumers engaged.

So, before leaping into the sponsorship world, ask yourself these questions. Can you truly enhance the sponsored experience for your consumers in a way that is authentic and memorable and is inherently connected to your

brand? How valuable is that association to your brand and how valuable is it to your consumers? And finally, how much are you willing to commit in resources from a financial and people perspective?

If you can create a truly memorable integration that allows consumers to experience your brand in a way that a TV commercial, social post or billboard never could, you've found a powerful way to breakthrough in an ever-fragmented world. ●

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The Transformative Power of Sports

It has the power to bring a nation together. It has the power to divide one. It has the power to produce iconic heroes and create dreams of being one. Sports have captured our attention for centuries. And, for marketers and media professionals, it is an invaluable tool to build brands and promote our clients' products.

If you don't believe those words, take it from someone else:

"Sport has the power to change the world, it has the power to inspire. It has the power to unite people in a way that little else does. It speaks to youth in a language they understand. Sport can create hope where once there was only despair. It is more powerful than government in breaking down racial barriers." — Nelson Mandela

In Canada, sports is a critical passion point and media aperture to connect with consumers. Brands like Tim Hortons and Molson would have a big hole in their media strategies if not for our beloved NHL. After all, in the age of hyper media fragmentation, big collective moments in our Canadian culture are much harder to come by and sports can give a brand that platform.

But will PVRs, pick and pay, online streaming and mobile consumption have a negative impact for marketers? The answer is likely not. Live audiences remain at the heart of the sports marketing proposition, but as media professionals we need to dig deeper. It is no longer only the

exposure of the impressions generated that drives value.

Sports fans are inherently social and consistent in their loyalty and interaction with sports. And, consider the vast majority of sports programming is consumed live. Recent studies show more than 60% of Canadians and more than 80% of millennials are using a second screen while viewing television. That number is most likely higher for sports as consumers find more ways to participate and share in the experience.

Technology and social media is actually enhancing our ability to utilize sports as a conduit for messaging. Leading rights holders are now in a position to put their brand in contact with exactly the right audience segments to achieve their objectives. Thanks to data, it is the ability to engage, involve and connect with fans that raises sports partnerships above mere marketing.

It is now about real-time relevancy. We can leverage data to create real-time, relevant in-game content and leverage the power of social media.

The use of data-enabled sports strategies allows for better partnerships, better audience targeting and a strong ability to measure ROI effectively. "Always on" content is more like "always around" content—in between games, pre-game and post-game.

This article can't be written without bringing up the state of the hockey audience in Canada, as Rogers' 12-year \$5.2 billion NHL deal has really just started.



Jeff Berry | Toronto Managing Director, Touché

Last year was a rough one for Rogers. For the first time in 46 years, a Canadian team did not make the playoffs and those hockey playoff audiences were, for the most part, cut in half.

But, audiences follow success. Case in point: with the Toronto Raptors and Toronto Blue Jays, ratings have grown substantially and attracted a wider national audience. As well, each has acquired more of the coveted millennial audience.

One might think Rogers is in a tough way, but that might not be the case. Rogers owns "all rights" and has plenty of time to figure it out, while NBC in the U.S. has strong digital competitors like Yahoo and Facebook livestreaming more major sports including NFL, MLB and boxing.

There is huge money in sports. YouTube, Snapchat and Twitter are looking to expand sports audiences. Sports are increasingly visible from global perspective. Recently, Yahoo was the first digital media company to livestream a regular NFL game internationally.

Indeed, there is a lot to think about. But there has never been a better time to leverage the power of integration within sports platforms to grow our clients' business. ●

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Evolving from a Physical Event to a Multimedia Experience

DEFINING EXPERIENTIAL MARKETING

One of the best definitions of experiential marketing is the one I read a couple of years back on Experience: The Blog. In the blog, the writer defines it as “deliberate encounters that engage consumers’ senses to create lasting impressions that drive brand growth in a measurable way.” It is quite a wordy and detailed definition, but I feel it covers all of the essential elements that make up experiential marketing.

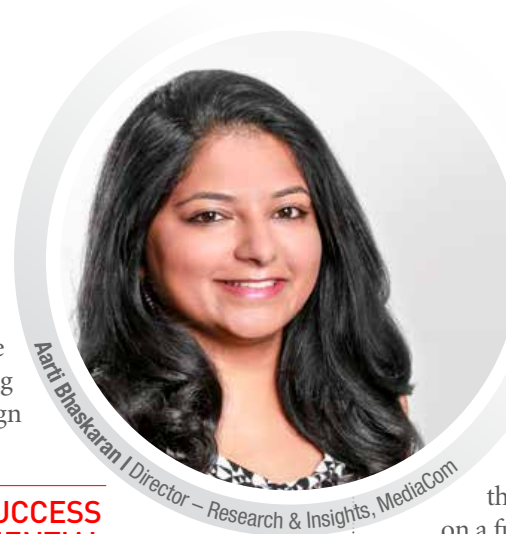
The term experiential marketing has become more commonplace in recent years. According to Event Marketing Institute and Mosaic’s EventTrack 2016 report, 51% of brands plan to spend more on their event content generation this year compared to 2015. While it is an age-old marketing technique, experiential is getting reinvented. The reinvention is due to the need for immersive experiences and tangible reality for the target group every marketer is gunning for—millennials. It is also because the media landscape has changed so much, as digital media grows in prominence. According to the EventTrack report, 98% of consumers create or capture some type of content at events and experiences and 100% share it, proving the changing nature of experiential marketing.

However, one must always keep in mind that experiential marketing continues to be a medium for marketing. Hence, we need to measure it the same way as other media, keeping the objective of the campaign at heart of it.

DECONSTRUCTING SUCCESS FACTORS FOR EXPERIENTIAL

To deconstruct what makes a successful experiential campaign, we need to start right at the beginning. It is all about planning a deliberate encounter in exacting detail, such as Diet Coke’s Get a Taste: Style Bar campaign in 2014. Before the event, consumers were visited in their offices and invited to the event in a memorable way. The event was executed in the midst of Fashion Week and included a pop-up store in downtown Toronto, in partnership with online luxury retailer Gilt. The brand used a roster of influencers to create interesting content and keep the conversation going. This made for an experience that reached people nationally and a campaign that successfully delivered on its objectives of getting more users for the brand.

While planning is the key first step, in this increasingly cluttered world, one needs to engage consumers to make them react. The Red Bull Stratos jump is a great example of how the world got to experience and participate in the space jump. It had phenomenal coverage on social media



and even picked up earned TV coverage, setting new precedence for experiential marketing, as well as helping redefine experiential as any experience—not just a physical one.

It is also critical that a campaign creates a long-lasting impression among consumers to make them think and feel something about the brand. At the heart of the campaign must be an insight that is based on a fundamental human truth that strongly ties in with what the brand stands for. Case in point is the Bentley Burial campaign for the Brazilian Association for Organ Transplantation. While the event itself was mostly used to generate curiosity and start conversation, the underpinning message comes from the power of the insight that people really do resent meaningless waste. And who can forget the WestJet Christmas events that were about uniting families and making wishes come true during the holiday season?

Finally, a successful experiential marketing campaign needs to deliver on a positive ROI to the brand. After all, it is only fair for a marketer to expect return on any investment they are making in the brand. But one must be clear about what the ROI should be from a particular campaign. It may not always be about sales or awareness, but also about building brand meaning, love, buzz or even attracting certain target groups. The EventTrack report found that 72% of consumers say they positively view brands that provide quality event content opportunities and experiences.

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When all of the elements come together, what we have is a memorable experiential marketing campaign. A best-in-class example is the Skittles Pawn Shop campaign over Christmas last year, which won a Bronze Media Lion in Cannes. The winning idea was based on the insight that 75% of Canadians had been disappointed by a bad holiday gift. Skittles invited consumers to trade unwanted gifts for Skittles at a pop-up store in Toronto. The campaign was supported by print, social and video to break through the holiday clutter, and exceeded expectations on ROI by more than 200%.

FUTURE OF EXPERIENTIAL MARKETING

Technology will play an increasingly key role in redefining and reshaping a consumer experience. Mobile has already changed the means of engagement over the past few years, allowing for geo-targeting and instant response. With wearables getting launched and talks of AI, internet of things and augmented reality, the medium will continue to evolve in the coming years. As marketers, planners and brand builders, we need to look at the definition of experiential to go beyond the event itself and include content, technology, targeting and crowdsourcing while planning a consumer experience. ●

What Can VR Mean to Marketing?

As staggering as this is, virtual reality as a technology has been talked about for more than three decades. As is often the case with cutting-edge technology, VR has taken a while to hit the mass market, but 2016 was the year Oculus Rift, PlayStation VR and Samsung Gear finally hit the mainstream. VR headsets range from \$15 pieces of cardboard, glass and magnets up to the \$800 HTC Vive (or Microsoft's HoloLens developer kit starting at \$3,000).

Simply put, they enable an immersive experience in which a person's head movements are tracked in a three-dimensional world. The quality of the experiences now is so good that it can even throw off the user's senses, making people feel as if they are really experiencing the environment first hand.

While immediate applications for the gaming industry are obvious, it should also come as little surprise that the adult entertainment industry is leading the charge in developing VR-ready experiences and technology. However, the real question lies in making VR applicable to the advertising world. In an age when ad evasion is the current hot topic, it seems unrealistic to ask consumers to download a specific app and attach their phone to a piece of hardware (or cardboard!) just to get the payoff



of an advertising experience. And yet, the allure of the technology somehow speaks to consumers enough to actually make this happen. The obvious physical barriers that exist are being overcome by the quality of the end user experience, but what sort of experiences can we offer?

Tourism was the first to jump on the technology, but there seems to be little evidence of the technology driving sales. If you are a brand that activates in this space, VR could help maximize your onsite activations, giving people thousands of kilometres away the ability to experience it first-hand. The North Face has taken this a step further by merging VR and real-life action to build content and amplify an in-mall contest (<https://www.youtube.com/watch?v=FSfkE4emoBE>). It certainly makes giving away a few jackets in Korea much more exciting!

The opportunity for creativity that a VR experience can bring can't be ignored. Marriott has done an amazing job of using VR to inspire travel, providing in-room travel experiences from all over the globe. Importantly, the hotel chain has used its own real estate as a means of

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distributing the technology, giving most people their first taste of VR and giving the brand a top spin for existing customers in a retention strategy.

VR can take us anywhere—even to Mars. Lockheed Martin created an unbelievable experience for school kids by taking a field trip to Mars (<https://vimeo.com/167788423>). With a group of kids seeing Mars from the bus windows, this shared experience has already moved us beyond headgear. There is no limit to the experience that can be brought to consumers. VR allows people to attend any experiential event that brands create, and the strong allure of the technology can also help modernize opinions of a brand. The opportunities abound for education and information—what we really need is to ensure that, as media people, we link this to real ROI.

Whether VR will be the dawn of an amazing transformative technology, or merely another more sizable blip on the evolution of the technology landscape, remains to be seen. How we link this to deliverables such as sales is still uncertain and will require rigour in building programs not just for fun, but for brand growth. It's our job, however, to remain optimistic about the potential for technology like this, and I for one, can't wait to find out where we can take this. ●

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In the real estate business, they have a very simple maxim – location, location, location.

The same can also be said for the media business.

As agencies strive to ensure their messages are delivered in venues that are relevant to the brands they represent and the audiences they target, there are few “locations” better than newspapers. Newspapers can and do deliver. It shouldn’t come as a surprise that newspapers offer engagement that is almost five times higher on average compared to other mass media, according to a 2013 study by Totum Research for Newspapers Canada.

Part of the reason may reside with the fact that newspapers continue to be content creators of the highest order. Professional journalists, editorialists and opinion leaders are the lifeblood of newspapers. And now, technology provides the freedom to distribute the content they create far beyond the printed page—to mobile, tablet and

desktop. Today, more than 25% of Canadians use all four means of content delivery, so advertisers can take full advantage of the power of the content they produce, cross platform (Source: Totum 2013).

In fact, newspapers are the original “content” platform for delivering communication to consumers, precisely when those consumers are ready to receive it. The variety of sectional content—from news to sports to business—means precise targeting of messaging, which ensures that ad engagement remains high. Unlike other media where ad avoidance is a problem, consumers not only expect advertising to be part of the newspaper environment, they count on it.

Newspapers also offer flexibility, something the channel rarely gets credit for. Whether looking to add reach or frequency—or both—newspaper advertising can be focused locally or extended nationally, depending on the need. Small space ads can run for frequency in order to be “always on,” or double-page spreads can be leveraged for maximum impact. And there are a multitude of choices in-between to fit virtually any creative idea, budget or frequency goal.

Today’s publishers also open up a wide range of sponsorship opportunities for advertisers, including



sponsored content, native and branded content—all valuable ways to build stronger connections with the consumer by leveraging the credibility of the media to the benefit of the brand.

It’s easy to write off newspapers as “yesterday’s media,” but don’t count newspapers out. While many papers have experienced declines in revenue and readership, smart newspapers have doubled down on their core competency—content. And the appetite for content among today’s consumers is practically insatiable. By innovating on the printed page, and in the digital mediums now available to them, newspapers can once again shine brightly. ●

Newspapers connect with Canadians and, in an increasingly complicated world, are the go-to medium for trusted, informed content.

Canada's newspapers are the cornerstone of public interest journalism and community information, and remain the medium of record for every community across the country. When Canadians want information on their communities or their world, they look to newspapers as their most trusted source.

As media content and platforms become more global in their outlook, newspapers remain uniquely positioned to provide hyper-local reach to audiences.

While much has been written about the business challenges facing the industry, newspapers are having no challenge attracting readers. Nearly nine in 10 Canadians are reading newspapers every week across multiple platforms—print, desktop/laptop, phone or tablet. While printed newspapers remain the leading platform, mobile is a close second.

Canada's newspapers are also adapting rapidly to provide readers with content when and how they want it, with Montreal's *La Presse* moving to a tablet-only model for its weekday edition, and the development of other digital innovations such as the *Toronto Star* Touch tablet edition. Newspapers have deployed other innovations, such as the *Winnipeg Free Press*'s micropayment initiative, that have not only helped newspapers expand their readership, but have allowed newspapers to understand their readers more than ever before.



For advertisers, newspapers continue to attract key demographics, with recent research from Totum for Newspapers Canada showing high weekly readership from baby boomers (88%), new car buyers (89%), young adults 18-34 (87%) and business decision makers (91%).

As a trusted and relevant medium that is popular with Canadians, newspapers remain an integral platform of successful marketing initiatives in communities in every part of Canada. ●

GENERAL INFORMATION

- Mid-year 2016, there are 90 paid dailies in Canada and 11 free dailies for a total of 101 daily newspapers.
- 4/5 of Canadians read a daily newspaper (in print or digital) every week
- Almost 60% of Canadians interact with newspaper content (in print or digital) every day, with print continuing to be the primary platform.
- Canada's daily newspaper circulation (paid and free) stands at 5,071,856 copies on an average publishing day and 30,295,294 copies over the course of a week.
- Paid daily newspapers (90) accounted for a total 25,134,286 copies over the week.
- Free daily newspapers (11) accounted for a total of 5,161,008 copies a week.
- Online readership continues to grow, and readership on tablets and smartphones is growing at a strong pace. According to Vividata, 70% of digital newspaper readers now read via a mobile device.

(Sources: Newspapers Canada, Vividata 2016 Q1)

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 lineage.
- Modular advertising involves selling ads by standardized sizes, e.g., half-page vertical versus columns and lines.

There are two basic newspaper formats:

BROADSHEET: A broadsheet page ranges from 10"–11⅞" wide by 20"–22". There are 67 broadsheets varying from six to 12 columns, with a 10-column format common to many. Full-page lineage ranges from 1,800 to 3,480 agate lines.

TABLOID: A tabloid page is generally 10"–10⅝" wide and 11⅝"–14" deep. There are 54 tabloids with the number of columns ranging from five to 10. Full-page lineage ranges from 715 to 2,000 lines.



Rahul Sethi | Insights Manager, Vividata

AD TYPES

- **ROP COLOUR:** Run of press colour is available in virtually all daily papers. Cost premiums vary by publication and minimum lineage requirements range from zero to 1,000 lines.
- **INSERTS:** 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.
- **FLEX FORM:** Flex form is any odd-shaped ad that does not conform to standard sizing, e.g., the ad may be placed around editorial in a variety of ways. Flex form is available in many dailies and usually carries a cost premium.
- **WRAPS AND GATEFOLDS:** These are multi-page ads that wrap around the paper or a section, including the front section. They often include a partial page. Gatefolds can also be placed within a section.
- **GUARANTEED POSITIONING:** Many positioning guarantees carry a premium charge.

CANADIAN MEDIA DIRECTORS' COUNCIL

DAILY NEWSPAPER READERSHIP AND RESEARCH

The Vividata Study provides cross-platform audience measurement and total readership (print and digital) for 70 consumer magazines and 43 daily newspapers. It is also a database of Canadians' media usage and profiles, demographics and attitudes, as well as product, brand and retail data in 200+ categories.

Total Study Sample 2016: 38,155 (12+) annually

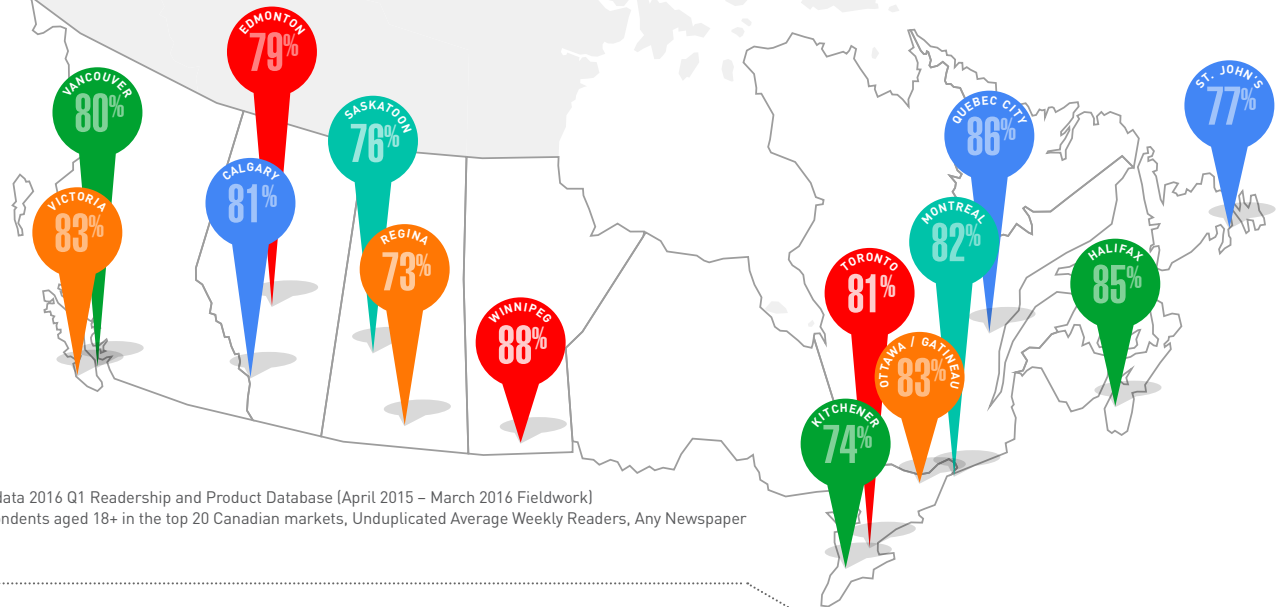
Study Design:

- Large robust sample recruited offline, for online interviewing
- Single data collection source for newspaper and magazine readership data and product/brand data
- Readership metric for newspapers and magazines: recent reading
- A 360-degree approach for measuring both print and digital readership for magazines and newspapers
- Data is released quarterly on a rolling 12-month basis (i.e. the most recent three months of fieldwork added and the oldest three months removed)

For more information on the Vividata Study, visit www.vividata.ca.

Weekly Print/Digital Reach (Adults 18+)

Daily newspaper brands remain strong across the major markets, consistently reaching eight out of 10 adults. In cities such as Winnipeg, Québec City, and Halifax, newspaper brands reach nearly nine of 10 adults.



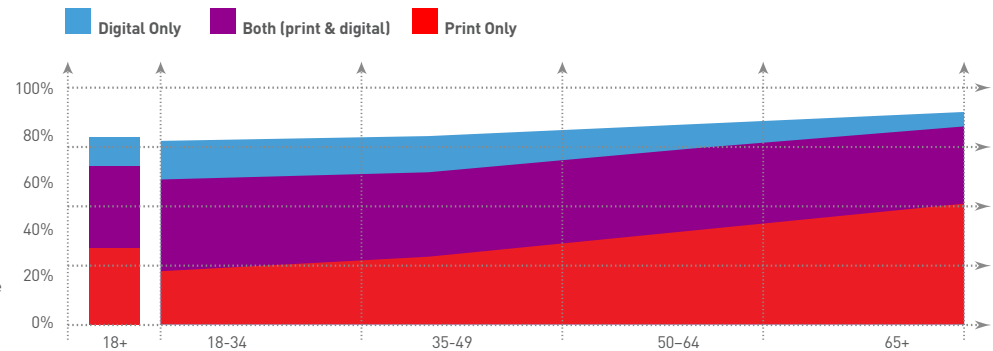
Source: Vividata 2016 Q1 Readership and Product Database (April 2015 – March 2016 Fieldwork)

Base: Respondents aged 18+ in the top 20 Canadian markets, Unduplicated Average Weekly Readers, Any Newspaper

Weekly Reach by Age Group (Adults 18+)

Readers of all ages are engaging with newspaper brands on multiple platforms. More than 50% of newspaper readership by Canadians 18-64 is now cross-platform — a significant change from five years ago.

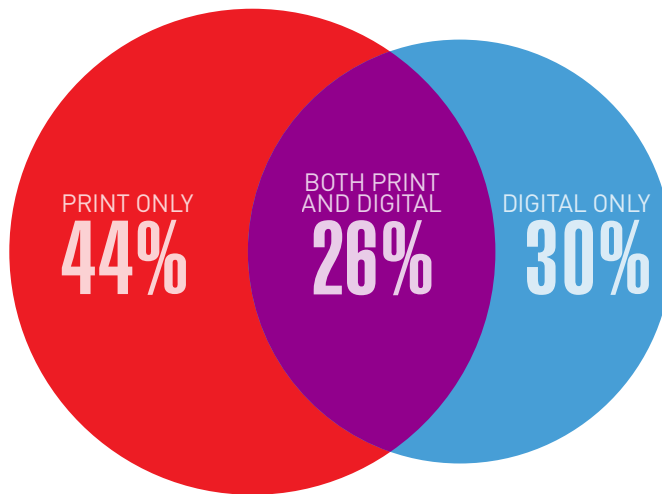
Source: Vividata 2016 Q1 Readership and Product Database (April 2015 – March 2016 Fieldwork)
Base: Respondents aged 18+ in the top 20 Canadian markets, Unduplicated Average Weekly Readers



CANADIAN MEDIA DIRECTORS' COUNCIL

Daily Reader Composition by Platform (Adults 18+)

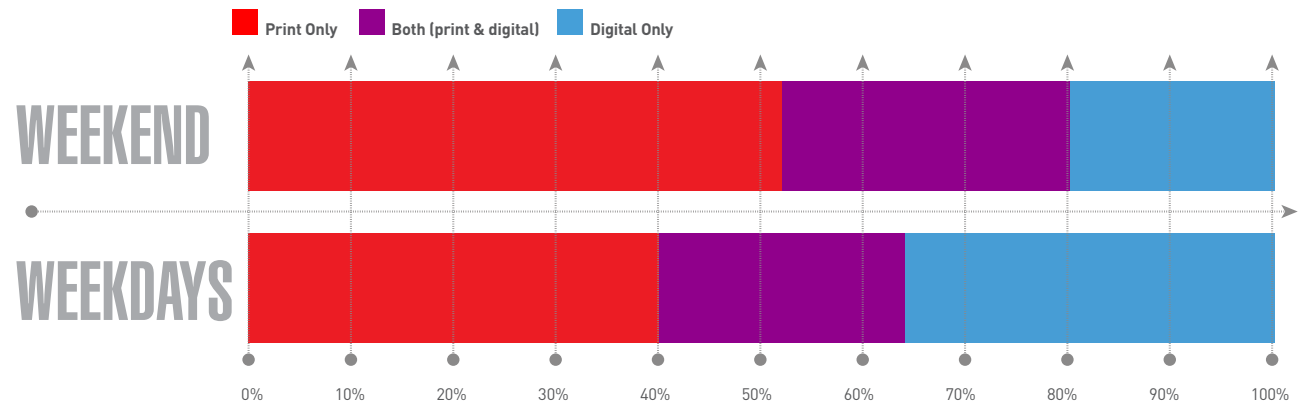
Seventy percent of newspaper readers still read a printed edition daily. While print remains the leading source for most newspaper readers in Canada today, digital and cross-platform (meaning they read both print and digital products) continues to grow.



Source: Vividata 2016 Q1 Readership and Product Database (April 2015 – March 2016 Fieldwork)
 Base: Respondents aged 18+ in the top 20 Canadian markets, Unduplicated Average Weekly Readers

Weekdays vs. Weekend Readership (Adults 18+)

Readers are more active on newspapers' digital products on weekdays. Thirty-six percent are digital-only readers during the week, however, printed newspapers remain the platform of choice on the weekends. The preference for print on the weekend could relate to more free time and expanded, content-rich weekend editions, whereas newspapers' digital products align to work and commuter schedules during the week.



Source: Vividata 2016 Q1 Readership and Product Database (April 2015 – March 2016 Fieldwork)
 Base: Respondents aged 18+ in the top 20 Canadian markets, Unduplicated Average Daily (M-F) Readers and Weekend (Sat/Sun) Readers
 *Excluding free dailies in all markets, i.e. Metro and 24 Hours

CANADIAN MEDIA DIRECTORS' COUNCIL

Newspaper Topline Readership — Weekly (Mon-Sun) Vividata 2016 Q1 18+ Average Issue Audience Weekly (Mon-Sun) (000)

Title	Net Print/Digital	Print	Digital
NATIONAL			
The Globe and Mail	6448	3611	4502
National Post	4497	2239	3193
ONTARIO			
The Toronto Sun	2365	1794	1179
Toronto Star	4610	3217	2776
QUÉBEC			
La Presse*	2082	749	1764
Le Devoir	1059	576	757
Le Journal de Montréal	3008	2397	1489
TORONTO CMA			
Any Newspaper	3971	3382	2273
24 Hours	1180	1154	164
Metro	1790	1678	457
National Post	1109	640	742
The Globe and Mail	1726	1052	1170
The Toronto Sun	1573	1242	753
Toronto Star	2917	2238	1674
MONTREAL CMA			
Any Newspaper	2688	2185	1684
24 Heures	1005	960	196
La Presse*	1136	470	929
Le Devoir	570	318	400
Le Journal de Montréal	1638	1327	829
Métro	1277	1202	287
Montréal Gazette	639	459	331
National Post	229	122	149
The Globe and Mail	302	168	214
VANCOUVER CMA			
Any Newspaper	1636	1477	814
24 Hours	812	789	133
Metro	871	823	182
National Post	448	243	285
The Globe and Mail	610	372	399
The Province	922	777	365
The Vancouver Sun	1050	829	505

OTTAWA-GATINEAU CMA			
Any Newspaper	887	726	591
Le Droit	218	167	122
Metro	383	344	102
National Post	212	87	167
Ottawa Citizen	563	391	370
The Globe and Mail	296	163	219
The Ottawa Sun	402	315	226
CALGARY CMA			
Any Newspaper	936	782	570
Metro	503	452	144
National Post	242	111	180
The Calgary Herald	625	432	385
The Calgary Sun	602	486	272
The Globe and Mail	301	149	226
EDMONTON CMA			
Any Newspaper	866	754	509
Edmonton Journal	647	475	386
Metro	493	457	108
National Post	233	125	154
The Edmonton Sun	514	413	236
The Globe and Mail	241	112	178
WINNIPEG CMA			
Any Newspaper	557	503	321
Metro	325	311	69
The Winnipeg Sun	325	270	153
Winnipeg Free Press	451	382	247
QUÉBEC CITY CMA			
Any Newspaper	572	479	345
Le Journal de Québec	441	377	204
Le Soleil	350	276	169
HAMILTON CMA			
Any Newspaper	485	399	285
The Hamilton Spectator	384	320	191
LONDON CMA			
Any Newspaper	311	223	228
London Free Press	287	199	194

KITCHENER CMA			
Any Newspaper	301	254	169
Waterloo Region Record	273	226	132
Halifax CMA			
Any Newspaper	291	257	174
Metro Halifax	232	207	80
The Chronicle Herald	NOT A MEMBER		
St. Catharines/Niagara CMA			
Any Newspaper	278	253	168
Niagara Falls Review	126	105	66
The Standard	143	117	78
The Tribune	100	83	52
Victoria CMA			
Any Newspaper	253	220	130
Times Colonist	240	210	109
Windsor CMA			
Any Newspaper	224	179	153
The Windsor Star	215	172	140
Saskatoon CMA			
Any Newspaper	188	140	119
The StarPhoenix	173	134	98
Regina CMA			
Any Newspaper	142	109	86
Leader Post	133	100	78
St. John's CMA			
Any Newspaper	134	98	88
The Telegram	129	97	80

Notes:

1. Weekly Net Digital/Print = Unduplicated number of Adults 18+ who read at least one printed edition or accessed digital content of the daily newspaper in the past week (Monday to Saturday/Sunday).

2. Weekly Print AIR = Unduplicated number of Adults 18+ who read at least one printed edition of the newspaper in the past week (Monday to Saturday/Sunday).

3. Weekly Net Digital = Audiences who read or looked into any digital content in the last week.

4. Any Newspaper = Unduplicated audience over the average week (Monday to Saturday/Sunday) of all measured newspapers in the specified market CMA.

5. Ontario = Province of Ontario

6. Québec = Province of Québec

*La Presse is only published in Print on Saturdays. The "Weekly Print" results for La Presse are for their Saturday edition

Source: Vividata 2016 Q1 Readership and Product Database

News Ownership

3

ALTA Newspaper Group/Glacier

Lethbridge Herald[†]
Medicine Hat News[†]
The Record, Sherbrooke

4

Black Press

Red Deer Advocate[†]
The Trail Times[†]
Cranbrook Daily Townsman[†]
The Daily Bulletin, Kimberley[†]

3

Brunswick News Inc.

Times & Transcript, Moncton[†]
The Daily Gleaner, Fredericton[†]
The Telegraph-Journal, Saint John[†]

3

Continental Newspapers Canada Ltd.

Penticton Herald
The Daily Courier, Kelowna
The Chronicle Journal, Thunder Bay

2

E.P. Canadian Newspapers LP

Winnipeg Free Press
Brandon Sun

3

Glacier Media

Alaska Highway News, Fort St. John
The Citizen, Prince George
Times Colonist, Victoria[†]

1

Globe and Mail Inc.

The Globe and Mail[†]

6

Groupe Capitales Médias

Le Nouvelliste, Trois-Rivières
La Tribune, Sherbrooke
La Voix de l'Est, Granby
Le Soleil, Quebec
Le Quotidien, Chicoutimi
Le Droit, Ottawa/Gatineau

1

Halifax Herald Ltd.

The Chronicle-Herald, Halifax[†]

6

Independent

L'Acadie Nouvelle, Caraquet[†]
Le Devoir, Montreal^{*}
The Whitehorse Star[†]
Fort Frances Daily Bulletin
[Epoch Times, Vancouver*](#)
[Epoch Times, Toronto*](#)

1

Power Corp. of Canada

La Presse, Montreal

45

Postmedia Network Inc./Sun Media

National Post[†]
The Vancouver Sun[†]
The Province, Vancouver[†]
[24 Hours Vancouver*](#)
Calgary Herald[†]
The Calgary Sun[†]
Edmonton Journal[†]
The Edmonton Sun[†]
Daily Herald-Tribune, Grande Prairie
Fort McMurray Today
The Leader-Post, Regina[†]
The StarPhoenix, Saskatoon[†]
Winnipeg Sun[†]
The Barrie Examiner
The Intelligencer, Belleville
The Expositor, Brantford

The Brockville Recorder & Times
The Chatham Daily News
Northumberland Today
Cornwall Standard-Freeholder
Daily Miner & News, Kenora
The Kingston Whig-Standard
The London Free Press
Niagara Falls Review
The North Bay Nugget
The Packet & Times, Orillia
Ottawa Citizen[†]
The Ottawa Sun[†]
The Sun Times, Owen Sound
The Daily Observer, Pembroke
The Peterborough Examiner
St. Catharines Standard

St. Thomas Times-Journal
The Observer, Sarnia
The Sault Star, Sault Ste Marie
The Simcoe Reformer
Beacon-Herald, Stratford
The Sudbury Star
The Daily Press, Timmins
The Toronto Sun[†]
[24 Hours Toronto*](#)
The Tribune, Welland
The Windsor Star[†]
The Sentinel Review, Woodstock
The Gazette, Montreal[†]

11

TC Media

Cape Breton Post[†]
The Evening News, New Glasgow
Truro Daily News[†]
The Telegram, St. John's[†]

The Guardian, Charlottetown[†]
The Journal Pioneer, PEI[†]
The Western Star, Corner Brook[†]
The Times-Herald, Moose Jaw

Prince Albert Daily Herald[†]
[Metro Halifax \(with Metro Intl SA\)*](#)
[Journal Metro, Montreal*](#)

9

Torstar Corp.

Toronto Star
The Hamilton Spectator
The Record, Grand River Valley
[Metro Calgary \(with Metro Intl SA\)*](#)
[Metro Edmonton \(with Metro Intl SA\)*](#)
[Metro Vancouver \(with Metro Intl SA\)*](#)
[Metro Winnipeg \(with Metro Intl SA\)*](#)
[Metro Ottawa \(with Metro Intl SA\)*](#)
[Metro Toronto \(with Metro Intl SA\)*](#)

3

Quebecor

Le Journal de Montréal[†]
Le Journal de Québec[†]
[Montreal 24 heures*](#)

88

Paid Daily
Newspapers

13

Free Daily
Newspapers

* non-member of CNA
† paywall/metered access
black - paid daily newspapers
blue - free daily newspapers

CANADIAN MEDIA DIRECTORS' COUNCIL

Market Size Publication Detail

Markets under 50K

Newspaper	Weekly Total (Print/Digital)	Daily Avg (Print/Digital)
Alaska Highway News	10,715	2,143
Brockville Recorder and Times^^ ~	53,979	10,796
Cape Breton Post	101,179	16,863
Cranbrook Daily Townsman^^	24,111	4,822
Daily Miner and News ~	8,308	1,187
Fort Frances Daily Bulletin	12,496	2,499
L'Acadie Nouvelle	108,612	18,102
Northumberland Today^^ ~	32,307	6,461
Penticton Herald	37,312	5,330
Prince Albert Daily Herald	31,425	5,238
St. Thomas Times-Journal ~	14,650	2,930
The Beacon Herald ~	35,394	5,899
The Daily Bulletin (Kimberley)^^	8,063	1,613
The Daily News (Truro)	26,820	4,470
The Daily Observer (Pembroke)~	13,920	2,784
The Daily Press (Timmins)^^ ~	40,309	6,718
The Journal-Pioneer	33,443	5,574
The News (New Glasgow)	30,276	5,046
The Packet & Times ~	51,924	8,654
The Sentinel-Review ~	22,278	3,713
The Simcoe Reformer^^ ~	47,341	9,468
The Sun Times^^ ~	84,457	14,076
The Times-Herald	60,066	10,011
The Trail Times	11,200	2,800
The Western Star	26,056	4,343
The Whitehorse Star	3,430	686
Grand Total (26 newspapers)	930,071	162,226

Markets 50K -100K

Newspaper	Weekly Total (Print/Digital)	Daily Avg (Print/Digital)
Brandon Sun	79,997	13,333
Daily Herald-Tribune ~	23,790	4,758
Fort McMurray Today ~	8,663	1,733
La Voix de l'Est	91,579	15,263
Medicine Hat News	77,778	12,963
Niagara Falls Review ~	74,416	12,403
Prince George Citizen^^	66,426	11,071
Red Deer Advocate	63,423	10,571
Standard-Freeholder ~	42,072	7,012
The Daily Gleaner	99,696	16,616
The Guardian	86,261	14,377
The Intelligencer ~	37,333	6,222
The North Bay Nugget ~	44,659	7,443
The Observer (Sarnia) ~	49,346	8,224
The Sault Star ~	47,719	7,953
The Tribune (Welland) ~	59,180	9,863
Waterloo Region Record	319,698	53,283
Grand Total (17 newspapers)	1,272,035	213,088

Report Notes:

*Digital circulation is combined Paid and Non-Paid - already included in Total Circulation column.

Daily newspapers defined as publications with minimum four days per week publishing schedule.

All AAM data calculated as an average from March 30, 2015 and September 30, 2015 Snapshot report.

CCAB data is based on December 31, 2014 unless otherwise stated.

CMCA data based on audits/verification reports throughout the 2015 year, unless otherwise stated.

PS denotes Publisher's Statement - no audit available.

Sing Tao (50% owned by Torstar) excluded from circulation analysis - no data available.

~ 35 Sun Media titles sold to Postmedia October 2014 and sale finalized April 2015.

CANADIAN MEDIA DIRECTORS' COUNCIL

Markets 100K -500K

Newspaper	Weekly Total (Print/Digital)	Daily Avg (Print/Digital)
La Tribune	166,139	27,690
Le Nouvelliste	248,254	41,376
Le Quotidien	182,021	26,003
Lethbridge Herald	122,388	17,484
Metro Halifax	236,050	47,210
NB Telegraph Journal	161,100	26,850
The Barrie Examiner^^ ~	83,466	13,911
The Chatham Daily News ~	29,152	4,859
The Chronicle-Herald	548,938	91,490
The Chronicle-Journal	141,101	20,157
The Courier (Kelowna)	67,323	9,618
The Expositor ~	105,212	17,535
The Kingston Whig-Standard ~	95,700	15,950
The Leader-Post	204,814	34,136
The London Free Press ~	362,553	60,426
The Peterborough Examiner ~	94,263	15,711
The Record (Sherbrooke)	21,715	4,343
The Standard ~	133,849	22,308
The StarPhoenix	234,045	39,008
The Sudbury Star ~	51,223	8,537
The Telegram	171,054	28,509
The Windsor Star	297,679	49,613
Times Colonist	349,784	58,297
Times Transcript	170,412	28,402
Grand Total (24 newspapers)	4,278,232	709,421

Markets 500K -1M

Newspaper	Weekly Total (Print/Digital)	Daily Avg (Print/Digital)
Le Journal de Québec	1,063,611	151,944
Le Soleil	549,188	78,455
Metro Winnipeg	176,060	35,212
The Spectator	681,451	113,575
Winnipeg Free Press	638,839	106,473
Winnipeg Sun ~	328,303	46,900
Grand Total (6 newspapers)	3,437,452	532,561

Report Notes:

*Digital circulation is combined Paid and Non-Paid - already included in Total Circulation column.

Daily newspapers defined as publications with minimum four days per week publishing schedule.

All AAM data calculated as an average from March 30, 2014 and September 30, 2014 Snapshot report.

AAM Qualified Circulation = change to reporting effective Sept 30, 2013 Snapshot report.

CCAB data is based on December 31, 2014 unless otherwise stated. CMCA data based on audits/verification reports throughout the 2014 year, unless otherwise stated.

PS denotes Publisher's Statement - no audit available.

Sing Tao (50% owned by Torstar) excluded from circulation analysis - no data available.

~ 35 Sun Media titles sold to Postmedia October 2014 but under review by Competition Bureau - not finalized until April 2015

Markets 1M +

Newspaper	Weekly Total (Print/Digital)	Daily Avg (Print/Digital)
24 Hours Toronto ~	1,065,715	213,143
24 Hours Vancouver ~	557,395	111,479
Calgary Herald	641,495	106,916
Epoch Times (Toronto)	52,695	10,539
Epoch Times (Vancouver)^	57,500	8,214
Journal Metro	860,010	172,002
La Presse	1,739,598	289,933
Le Devoir	260,147	43,358
Le Droit	204,947	34,158
Le Journal de Montréal	1,626,327	232,332
Metro Calgary	303,270	60,654
Metro Edmonton	303,895	60,779
Metro Ottawa	241,595	48,319
Metro Toronto	1,024,200	204,840
Metro Vancouver	567,500	113,500
Montreal 24 heures	751,193	150,239
National Post	1,116,647	186,108
Ottawa Citizen	550,777	91,796
The Calgary Sun ~	302,938	43,277
The Edmonton Journal	555,252	92,542
The Edmonton Sun ~	263,542	37,649
The Gazette	485,369	80,895
The Globe and Mail	2,018,923	336,487
The Ottawa Sun ~	238,584	34,083
The Province	686,805	114,467
The Toronto Sun ~	849,131	121,304
The Vancouver Sun	820,719	136,787
Toronto Star	2,231,338	318,763
Grand Total (28 newspapers)	20,377,504	3,454,562

CANADIAN MEDIA DIRECTORS' COUNCIL

Disregard the value of community newspapers at your peril.

With 1,060 currently in print, at a combined weekly circulation approaching 20 million copies, community newspapers can be used successfully, from mass campaigns requiring national coverage, right down to hyper-local initiatives. Just ask any major retailer. The retail sector has long recognized the importance of a strong local advertising platform. In fact, Newspapers Canada reports that 58% of all ad revenue directed towards community papers is derived from the retail sector.

Community newspapers provide readers with the information that is most relevant to them as they navigate their busy lives. Local news and entertainment, community events, sports, and of course advertising, provide a robust content package that continues to meet the needs of individuals and families as a trusted source they have come to rely on. In fact, according to



a 2016 Metroland Media/BrandSpark study, community newspapers were considered the most trusted source of advertising amongst 88% of respondents surveyed. This is likely due in no small part to the fact that community newspapers are often noted (along with churches, service clubs and schools) for their involvement in the communities in which they reside.

Community newspapers are not just a media channel that appeals to people in the neighborhoods they live in—they are part of the neighbourhood. ●

CANADIAN MEDIA DIRECTORS' COUNCIL

The community newspaper industry in Canada at this time in history can be described in one word: **vibrant**.

Community newspapers are a unique breed in the media landscape. In a world where instant messaging is bombarding consumers from all directions, the community newspaper is a calm, trusted voice that penetrates the static and clutter of a busy, often frantic, world.

Community newspapers are healthy. Many are having strong financial results and new community newspapers are being started where populations and advertisers are looking for a local voice they can identify with. This is happening where population shifts are creating demand. We are seeing it in growing suburban communities, growing urban ethnic communities, and in a broad spectrum of special-interest communities.

This is a vibrant community of journalists, advertising professionals and publishers who carefully craft a product that reflects the community they serve. Our readers, young and old, invest a significant amount of time with us each week because they know they can trust their community newspaper to thoughtfully tell them what is going on down their street. It is this tangible connection with our communities that will keep Canada's community newspapers strong, healthy and vibrant well into 2017 and into the foreseeable future. ●



CANADIAN MEDIA DIRECTORS' COUNCIL

Contributed by Rahul Sethi,
Insights Manager, Vividata

COMMUNITY NEWSPAPERS

- Seven out of 10 Canadian adults read a community newspaper each month.
- 52% of adults read a community newspaper weekly — 32% are university educated while 45% earn an annual household income of \$75,000 or more. The majority of community newspaper readers are homeowners.
- As of mid-2016, 19.45 million copies of community newspapers are circulated weekly, the majority of which are distributed free of charge (down 7% from 2014).
- As of June 2016, 1,060 community newspaper titles and 1,160 editions are published; 12% are broadsheet format and 88% are tabloid.
- Over 50% of readers cite flyers as one of their main reasons for reading community newspapers.
- Community newspapers are an efficient way of reaching non-urban Canadians. More than a third of these readers don't read any other newspaper.

(Sources: Newspapers Canada Community Snapshot Report, Vividata 2016 Q1)



Rahul Sethi | Insights Manager, Vividata

Monthly Reach of Community Newspapers (Adults 18+)

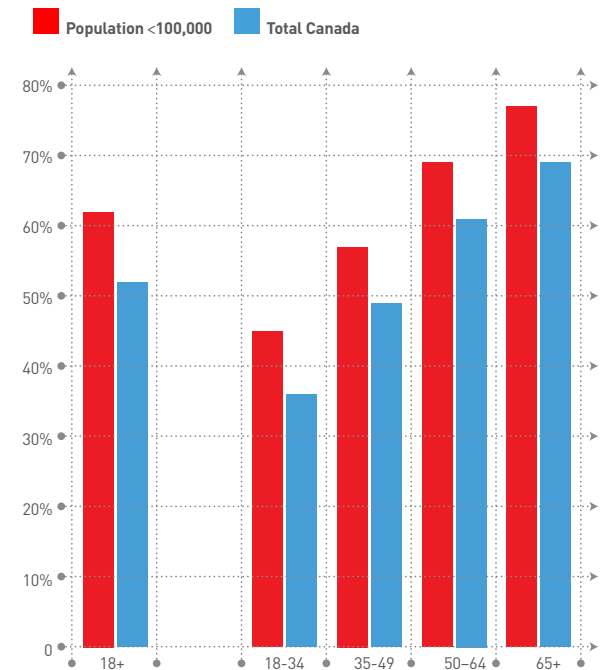
Community newspaper brands remain strong across the country, consistently reaching seven out of 10 adults. In British Columbia, community newspapers reach nearly eight of 10 adults monthly.

Province	Reach	# of Titles
BC	77%	127
Alberta	71%	127
Saskatchewan	70%	80
Manitoba	64%	55
Ontario	71%	390
Quebec	69%	184
Atlantic	69%	85
Atlantic	69%	85

Source: Vividata 2016 Q1 Readership and Product Database (April 2015 – March 2016 Fieldwork)
Base: Respondents aged 18+, Total Canada, Read a local community newspaper at least once within a month
*Title data provided by Newspapers Canada Database (June 30, 2016)

Weekly Reach of Community Newspapers (Adults 18+)

Community newspapers are stronger in smaller markets, with readership increasing with age.



Source: Vividata 2016 Q1 Readership and Product Database (April 2015 – March 2016 Fieldwork)
Base: Respondents aged 18+, Last Read a Local Community Newspaper Past 7 Days

CANADIAN MEDIA DIRECTORS' COUNCIL

Reasons for Reading Printed Community Newspaper (Adults 18+)

Regardless of population size, local is a key reason for reading community newspapers. The vast majority (96%) of readers in small communities read for local information and news.

	Population 100K+	Population ≤ 100K
Classifieds*	43%	57%
Advertising*	64%	72%
Local Information*	95%	96%

Source: Community Newspapers Drive Results (February 2016); Newspapers Canada via Totum Research
Base: Respondents aged 18+
*Local Information=Local News, Editorial, Sports, Entertainment, Events;
Advertising=Advertising in the paper, Flyers/Inserts
Classifieds=Classifieds, Employment, Real Estate

Community Newspapers Across Platforms (Adults 18+)

83% of adults in small communities read newspaper content across multiple platforms. But, Canadians still prefer their community newspaper content in printed format.

Device	Reach
Smartphone	41%
Tablet	46%
Desktop/Laptop	50%
Printed Newspaper	60%

Source: Community Newspapers Drive Results (February 2016); Newspapers Canada via Totum Research
Base: Respondents aged 18+, Communities with populations less than 100,000
Classifieds=Classifieds, Employment, Real Estate

Favourite Source of Local News and Information

Adults in smaller communities are far more likely to choose community newspapers as their favorite source of local news and information.

Media	Population ≤ 100K	Population 100K+
Printed Community Newspaper	38%	28%
Local TV Station	14%	23%
Local Radio Station	16%	14%
Social Media	12%	13%
Community Newspaper Website	6%	6%
City/Town Website	4%	4%
Local Community Blog	1%	2%

Source: Community Newspapers Drive Results (February 2016); Newspapers Canada via Totum Research
Base: Respondents aged 18+

Circulation by Market Size

Adults in smaller communities are far more likely to choose community newspapers as their favourite source for local news and information.

2016 Market Size Groups	# Newspapers	% of Total	Total Average Daily Circulation	% of Total	Total Weekly Circulation	% of Total
< 50K Population	26	26%	162,226	3%	930,071	3%
50-100K Population	17	17%	213,087	4%	1,272,035	4%
100-500K Population	24	24%	709,420	14%	4,278,232	14%
500K-1M Population	6	6%	532,561	11%	3,437,452	11%
1M+ Population	28	28%	3,454,562	68%	20,377,504	67%
Total	101	100%	5,071,856	100%	30,295,294	100%

Report Notes:
*Digital circulation is combined Paid and Non-Paid - already included in Total Circulation column.
Daily newspapers denied as publications with minimum four days per week publishing schedule.
All AAM data calculated as an average from March 30, 2015 and September 30, 2015 Snapshot report.
CCAB data is based on December 31, 2015 unless otherwise stated.
CMCA data based on audits/verification reports throughout the 2015 year, unless otherwise stated.

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Circulation by Province/Territory

Province/ Territory	Total Titles	Total Editions	Paid	Controlled	Total Circulation (all editions)	% of Total Circulation (all editions)	Average Circulation (per edition)	Median Circulation (per edition)	Total Circulation of Smallest Edition	Total Circulation of Largest Edition
BC	127	169	53,539	3,009,227	3,062,766	15.7%	18,123	10,400	352	117,700
AB	127	132	91,084	916,909	1,007,993	5.2%	7,636	3,877	184	119,825
SK	80	81	64,726	405,261	469,987	2.4%	5,802	1,432	273	90,312
MB	55	58	44,947	392,558	437,505	2.2%	7,543	3,582	515	43,749
ON	390	432	265,864	8,203,356	8,469,220	43.5%	19,605	10,000	201	197,547
QC	184	187	96,142	4,941,210	5,037,352	25.9%	26,938	20,015	200	145,815
NB	27	28	35,013	215,744	250,757	1.3%	8,956	4,307	1,521	37,109
NL	14	15	21,767	27,623	49,390	0.3%	3,293	2,009	731	17,600
NS	40	40	44,068	555,525	599,593	3.1%	14,990	6,723	823	55,000
PE	4	4	5,647	8,771	14,418	0.1%	3,605	3,586	1,405	5,841
YT	2	3	4,873	5,690	10,563	0.1%	3,521	4,066	958	5,539
NT	7	8	18,115	11,289	29,404	0.2%	3,676	3,731	875	7,059
NU	3	3	4,423	10,744	15,167	0.1%	5,056	5,942	2,857	6,368
Canada	1,060	1,160	750,208	18,703,907	19,454,115	100.0%	16,771	9,594	184	197,547

CANADIAN MEDIA DIRECTORS' COUNCIL

Owner Type

Province/ Territory	Independent Titles	Independent Groups*	Corporate	Total Titles
BC	14	3	110	127
AB	31	24	72	127
SK	26	14	40	80
MB	15	13	27	55
ON	97	37	256	390
QC	50	16	118	184
NB	1	1	25	27
NL	2	0	12	14
NS	6	0	34	40
PE	1	3	0	4
YT	1	0	1	2
NT	2	0	5	7
NU	1	0	2	3
Total	247	111	702	1,060
	23%	10%	66%	100%

* with 2 or more titles

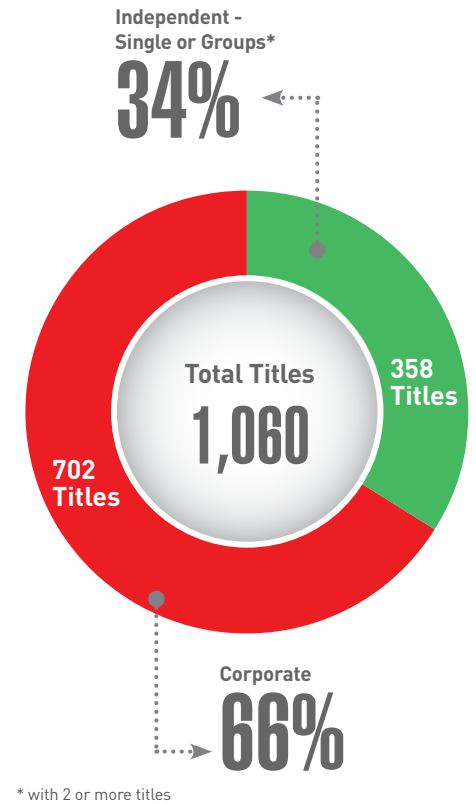
Publishing Frequency

Province/ Territory	1 Edition per Week	2 Editions per Week	3 Editions per Week	Total Titles
BC	91	30	6	127
AB	123	3	1	127
SK	79	1		80
MB	53	1	1	55
ON	358	22	10	390
QC	181	3		184
NB	26	1		27
NL	13	1		14
NS	40			40
PE	4			4
YT	1	1		2
NT	6	1		7
NU	3			3
Total	978	64	18	1,060
	92%	6%	2%	100%

CANADIAN MEDIA DIRECTORS' COUNCIL

Ownership of Community Newspapers

Owner	# Titles	# Editions	Paid	Controlled	Total Circulation	Average Circulation Per Edition
Aberdeen Publishing L.P.	7	7	3,594	37,926	41,520	5,931
Advocate Printing & Publishing Co.	10	10	16,359	56,156	72,515	7,252
Black Press Group Ltd.	88	119	41,655	2,016,060	2,057,715	17,292
Brunswick News Inc.	20	21	25,080	179,446	204,526	9,739
Compagnie d'Édition André Paquette	8	8	13,418	127,482	140,900	17,613
Continental Newspapers Canada Ltd.	1	2	0	24,496	24,496	12,248
Department of National Defence	16	16	0	90,295	90,295	5,643
FP Newspapers Inc.	8	8	5,830	200,418	206,248	25,781
Glacier Media Group	59	69	47,717	964,650	1,012,367	14,672
Great West Newspapers, LP.	18	19	17,571	139,595	157,166	8,272
Groupe Capitales Médias	1	1	26,591	2,726	29,317	29,317
London Publishing Corporation	11	11	7,698	99,819	107,517	9,774
Metroland Media Group Ltd.	112	148	20,355	5,348,362	5,368,717	36,275
Northern News Services Ltd.	7	8	22,004	10,284	32,288	4,036
Postmedia Network Inc.	9	9	3,579	225,484	229,063	25,451
Snap Newspaper Group Inc.	72	72	0	733,000	733,000	10,181
Star News Inc.	11	11	3,509	55,913	59,422	5,402
Sun Media Corporation	95	104	54,802	1,194,352	1,249,154	12,011
TC.Transcontinental	142	146	63,121	4,203,061	4,266,182	29,220
The Halifax Herald Ltd.	7	7	3,355	256,072	259,427	37,061
Independent Groups*	111	115	131,857	1,020,904	1,152,761	10,024
Independent Titles	247	249	242,113	1,717,406	1,959,519	7,870
Total	1,060	1,160	750,208	18,703,907	19,454,115	16,771



CANADIAN MEDIA DIRECTORS' COUNCIL

**CONTACT SOURCES FOR MORE INFORMATION
& RESEARCH RESOURCES****ALLIANCE FOR AUDITED MEDIA (AAM)**

Alliance for Audited Media (AAM)
 151 Bloor Street West, Suite 850
 Toronto, ON M5S 1S4
 Phone: (416) 962-5840
www.auditedmedia.com

The Alliance for Audited Media is a non-profit industry body founded by the Association of National Advertisers to ensure media transparency and trust. AAM provides independent verification and information services for thousands of leading publishers, advertisers, ad agencies and ad tech platforms to facilitate the planning, buying, selling and delivery of traditional and digital media. The organization is also one of the industry's most experienced providers of technology certification audits to standards established by the Media Rating Council, Trustworthy Accountability Group, Interactive Advertising Bureau and Mobile Marketing Association.



For more information contact:
Joan Brehl | VP/GM
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CCAB, DIVISION OF BPA WORLDWIDE

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 Phone: (416) 487-2418
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Quebec office:

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 Pointe-Claire, Quebec H9R 5N3
 Phone: (514) 845-0003
www.bpaww.com

CCAB, BPA Worldwide's Canadian division, audits more than 300 properties under the CCAB and iCompli brands. Media properties audited under the CCAB brand are subject to the standards set by BPA's board and committees and include business publications, consumer magazines, and community and daily newspapers. Properties audited under the iCompli brand are subject to the standards set by organizations and industries outside of BPA, such as flyer accreditations performed to the standards established by Flyer Distribution Standards Association (FDSA). Another service offering under our iCompli banner is CASL Guard which helps media owners and advertisers assess compliance under Canada's Anti-Spam Legislation (CASL).

Business publications and consumer magazines release two brand reports each year, while community and daily newspapers release one annual brand report. Community and daily newspapers report top-line circulation and audience data in quarterly TRAC reports. CCAB's brand reports and TRAC data can be accessed by visiting their website, www.bpaww.com, or by emailing Tim Peel.

CCAB issues a monthly newsletter. Please email Tim Peel to activate your subscription.



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CARDonline

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CARDonline is the essential tool for Canadian media buyers and planners. CARDonline provides critical advertising rates, data and media planning information for advertising, marketing, PR and communications professionals.



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CANADIAN MEDIA CIRCULATION AUDIT (CMCA)

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A unit of Newspapers Canada, CMCA reports circulation for more than 600 publications. Circulation data is reported every six months and is verified annually by the CMCA. Once a year, an audit is performed by either a CMCA auditor or a public chartered accountant. At the beginning of 2013, the CMCA audit was made open to all community newspapers, not just member newspapers.



**Canadian
Media Circulation
Audit**

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NEWSPAPERS CANADA

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Newspapers Canada is a joint initiative of the Canadian Newspaper Association (CNA) and the Canadian Community Newspapers Association (CCNA). Today, the primary role of Newspapers Canada is to represent the needs of CNA and CCNA members in three major areas: public affairs, marketing and member services.

The CNA and the CCNA are two separate organizations that partnered to create one strong industry voice for newspapers in Canada. Combined, the two associations represent more than 830 daily, weekly and community newspapers in every province and territory in Canada. The CNA and the CCNA are co-managed by one CEO but remain governed by two separate boards of directors in order to preserve the uniqueness of the programs and services offered to each member. By combining resources and collaborating on a variety of different projects,

Newspapers Canada provides more relevant services to all newspaper members, while also increasing the profile and effectiveness of the newspaper industry in Canada.

Newspapers Canada Readership Studies

“Newspapers 24/7” (2016), via Totum Research

“Community Newspapers Drive Results” (2016), via Totum Research



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VIVIDATA

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www.vividata.ca

Vividata is Canada's authoritative source of print and digital audience data, for magazines and newspapers. Founded in 2014, Vividata is the amalgamated organization of two media measurement bodies, NADbank and PMB.

Vividata's single-source survey provides cross-platform audience measurement for 70+ consumer magazines and 70+ daily newspapers, surveyed across 50 markets. Results include average issue readership by platform, unduplicated reach by publication and other qualitative metrics.

CANADIAN MEDIA DIRECTORS' COUNCIL

A tripartite, not-for-profit organization, Vividata is governed by a board of directors representing the interests of Canadian publishers, agencies and advertisers. Vividata is committed to providing their 500+ members with up-to-date audience research and insights relevant to today's media industry.

Vividata Readership Studies:

"Vividata 2016-Q1 Readership and Product Database"
(National, Regional, 20 Local Markets)

"Vividata 2016-Q2 Readership and Product Database"
(National, Regional, 49 Local Markets)



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Ontario Community Newspaper Association

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www.ocna.org

Quebec Community Newspaper Association

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Ile Perrot, QC J7V 4X2
Phone: (514) 453-6300
info@qcna.qc.ca
www.qcna.org

Saskatchewan Weekly Newspaper Association

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Saskatoon, SK S7L 5Z9
Phone: (306) 382-9683
nnater@swana.com
www.swana.com ●

CANADIAN MEDIA DIRECTORS' COUNCIL

How relevant are magazines in an age of instantly available global content on virtually any subject?

Is it defensible to invest scarce advertising dollars in a medium that is incapable of providing response data in real time or message adjustment on the fly? Should those responsible stewards of their clients' advertising expenditure allocate those funds to a predominantly paper-and-ink medium?

Yes...and no. No simply because no medium should be a default buy. Yes for the same reasons that magazines have always been included in an advertising schedule.

There is no must-buy medium just as there is no never-buy medium. Each of the six major options has attributes that lend it strengths and weaknesses, which in turn make them right for one campaign and wrong for another. Magazines offer the same strengths they always have—high potential reach, excellent research, targeting capabilities, four-colour reproduction, content opportunities, etc. Conversely, they have long lead times, are slow to build reach and deliver low frequency at all but the highest of spend levels.

Magazines have deftly migrated into the digital space with many publications offering attractive online products and

digital subscription packages. These platforms allow publishers to engage their readership in two-way conversations and move beyond static images to video offerings. These properties mitigate the long publishing cycle, offering fresh, up-to-the-minute content. They also offer advertisers more robust and engaging ad units.

It is true that circulation is down and with it print readership. Some of the decline can be blamed on erosion from the online world, but more is attributable to the discontinuation of publisher tactics that artificially inflated readership through various unpaid distribution schemes. However, those who maintain magazine subscriptions or buy copies from newsstands remain committed to the tactile nature of the medium. Still others have become digital subscribers through platforms such as Texture or Zinio.

Virtually every demographic group reads magazines and different publishing categories emphasize different cohorts. According to Vividata's Q1 2016 survey, 70% of the Canadian 12+ population report reading the last issue of at least one measured publication. Granted, they skew to the older end of the age range but not dramatically. In fact, some publishing categories skew to the vaunted



millennial cohort; magazines in the city/regional, entertainment, fashion, parenting and sports genres all skew young.

Are magazines dead? Far from it. What may be at risk is the centuries-old paper-and-ink method of distribution. But what of it? Certainly some will mourn the loss of the tactile product. Fragrance manufacturers will also be hard-pressed to replace the medium's ability to deliver a scent strip to a fashion and beauty conscious audience. However, magazines are about content, and content can be delivered digitally more efficiently than print.

Despite some impressions to the contrary, magazines remain a vital and viable weapon in the advertiser's arsenal. ●

CANADIAN MEDIA DIRECTORS' COUNCIL

Canadian magazine media remain a vibrant and vital part of the broader media landscape, with deep reach into specialized audiences through long-established brands present across multiple channels.

Readership remains very strong, with 70% of Canadians reading magazines in print or digital format, and the critical adult urban audience reading between three to 4.5 titles. The latest Vividata data shows that 92% of magazine readers read print (51%) or both print and digital (41%) formats. Despite the increasing adoption of digital and especially mobile platforms, print is clearly tied to effectively reaching audiences.

Their robust multi-platform presence suggests magazines are a critical access point for any brand considering a diversified marketing strategy. Today's audiences are constantly evolving, and Canada's magazine media is adapting with them to meet their needs, find value for advertisers and connect in a relevant way.

Thanks to editors with unrivalled expertise and specialist knowledge in their sectors, magazine readers receive well-curated experiences. Editors can drive conversations in special-interest communities, while being at the forefront of emerging trends.

Magazines require low investment for a high return. This year, Nielsen Catalina Solutions released a study proving that magazines are an extremely effective advertising medium for CPG brands. The U.S. study, which analyzed nearly 1,400 campaigns across 450 brands in seven categories, found that magazines delivered the highest return on advertising spend of all media, at \$3.94 for every dollar spent. Print advertising continues to prove the power of magazine media to both "tell" and "sell."

A 2016 U.K. study (Magnetic and Millward Brown) found that magazines help brands drive growth as well as brand differentiation. Magazines delivered +1.77% uplift in impact on consumers for brands and a +1.53% uplift in achieving brand affinity. Magnetic's report noted that with magazines' "targeted and contextual nature, reaching a receptive and attentive audience with a relevant message in magazines is easily achieved." Magazine advertising



is also one of the most trustworthy ways to reach consumers. According to Nielsen's 2015 Global Trust in Advertising report, nearly 60% of global respondents said they trust magazine ads—significantly higher than for video ads, social networks, mobile ads or online banners.

As the digital shift accelerates, we're also seeing a trend for consumers to carve out more quality experiences and "me time" outside of their social networks and away from "screens"—magazines offer the perfect balance of trusted brands, high-quality content, and meaningful connections. Ultimately, magazines remain one of the only products where consumers actually choose to browse the ads as much as the content, a level of engagement that's hard to find elsewhere.

Magazine brands aren't simply moving from paper to digital: they are media companies broadening into a more complex and diverse universe of content creation and audience targeting. This is a good thing for advertisers and agencies that (with ever-tightening budgets) want to measure their buy but also need to be seen across various channels. ●

CANADIAN MEDIA DIRECTORS' COUNCIL

Contributed by Michael Walker, President, The Walker Media Group Inc. and Rahul Sethi, Insights Manager, Vividata

Canada's magazine industry remains one of the most robust in the developed world.

While there have been some declines, magazine single copy sales at retail still represent approximately \$140 million annually. The Top 50 Canadian magazines generate more than \$500 million in total revenue (advertising, subscription and newsstand).

General interest and women's magazines report the highest average issue circulation in Canada, with seven titles exceeding 200,000 paid circulation.

There has been a recent reduction of magazine circulation, with publishers focusing more on retaining core, loyal readers versus carrying lapsed subscriptions or extending renewal periods. One result is that U.S. magazines have reduced circulations in Canada, in some cases, by a significant amount. However, Canadians have 1,311 Canadian titles providing a broad range of content across multiple editorial categories.

READERSHIP UPDATE

Magazines continue to be a strong reach medium, with a three-month all persons 12+ reach potential of nearly 80%. This ranges from a low of 62% 18 to 24 year-olds to a high of 93% for those 65+. Twenty-four measured magazines deliver an average issue reach of more than one million readers, with the top title—Reader's Digest—posting over four million.

There have been some readership declines in the past two to three years in general, but many individual magazines have maintained consistent average issue readership.

DIGITAL EDITIONS

Digital and mobile platforms continue to enhance and transform the publishing industry. With the significant growth in mobile usage, publishers have accelerated development of applications that have the ability to expand traffic and increase online advertising reach. Most formats are now fully mobile-friendly, both for tablet and smartphone.

Digital magazines offer an enhanced reading experience through videos, extra photos, slide shows, audio and animation.

These formats expand the range of options to advertisers beyond the standard formats and provide engaging ways to connect with readers. Furthermore, the digital footprint of magazines includes an array of contact points and provisions, such as a website, Facebook, Twitter, YouTube, Layar/Viewa technology (which allows a printed page to upload and come alive when scanned by a mobile device), apps, online shopping and RSS feeds, to name a few.

Creative Formats

Standard Formats	Special Formats
Full page	1/3 centre spread
Fractional Pages (1/2, 1/3, 1/4, 2/3, 1/6)	¼ page checkerboard
Full page opposite 1/3 page	1/3 page bookends (outer edges of spread)
Double Page Spread (DPS), Half Page Spread	Bellybands
Guide page Spread	Ink jetting
Consecutive pages	Faux covers, double/triple covers
Inside Front Cover (IFC), Outside Back Cover (OBC), Inside Back Cover (IBC)	Flip magazines
Inserts	Fragrance strips
Polybags	French doors on the cover
Business Reply Cards (BRC)	Gatefolds: single, double, triple. Side, bottom or top opening
Advertorial	Tip-on, Glue-ons
	Peel and Reveal, Scratch and sniff, Scratch and reveal
	QR codes, AR Coders, NFC tags, Blippar
	Video clips
	Sound chips
	Special inks
	Pop ups

CREATIVE CONSIDERATIONS

The list of creative formats is expanding in the magazine world. Agencies and advertisers are seeking ways to increase efficiency and effectiveness through positioning options and unique/special creative formats. In many cases, these executions require incremental media and/or production costs and longer lead times. Advertisers should contact publishers regarding added costs and timing.

CLOSING DATES AND CANCELLATION POLICIES

For national monthly magazines, commitment to standard ad space is generally required four to eight weeks in advance of the publication date, with creative materials required approximately one week later. Weekly magazines can accommodate shorter timelines.

After an issue has closed, committed ad space is non-cancellable. Creative changes may be possible after close, but this must be prior to the creative material deadline.

Special formats require earlier deadlines and are generally non-cancellable. Availability of the special positions is limited and can be secured on a long-term basis.

CANADIAN MEDIA DIRECTORS' COUNCIL

CONSUMER MAGAZINES – READERSHIP AND RESEARCH

The Vividata Study provides cross-platform audience measurement and total readership (print + digital) for 70 consumer magazines and 43 daily newspapers, unlike previous magazine readership studies that measured the print platform only. It is also a database of Canadians' media usage and profiles, demographics and attitudes, as well as product, brand and retail data in 200+ categories.

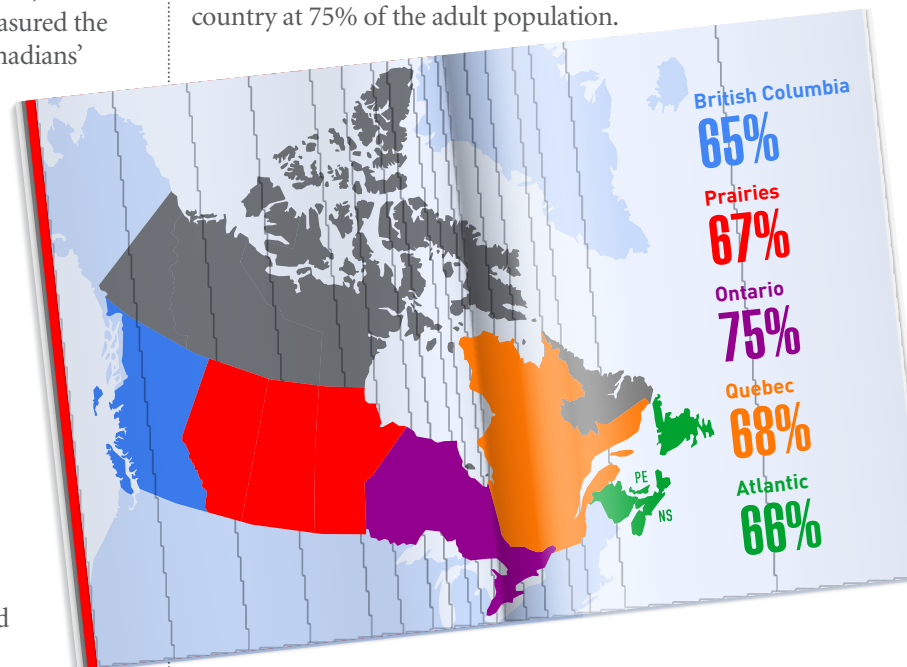
Total study sample 2016: 38,155
(12+) annually

Study Design:

- Large robust sample recruited offline, for online interviewing
- Single data collection source for newspaper and magazine readership data and product/brand data
- Readership metric for newspapers and magazines: Recent Reading
- A 360-degree approach for measuring both print and digital readership for magazines and newspapers
- Data is released quarterly on a rolling 12-month basis (i.e. the most recent three months of fieldwork added and the oldest three months removed)
- For more information on the Vividata Study, visit www.vividata.ca.

Magazine Print/Digital Reach

Across the major regions in Canada, magazine brands consistently reach nearly seven out of 10 adults, with Ontario having the highest magazine readership in the country at 75% of the adult population.



Source: Vividata 2016 Q1 Readership and Product Database (April 2015 – March 2016 Fieldwork)
Base: Respondents aged 18+, Unduplicated Print/Digital Average Issue Readers, Any Magazine

Magazine Reach by Age Group (Adults 18+)

Seventy per cent of Canadians are reading magazines, a figure comparable to readership levels from five years ago. Today, however, almost half of magazine readers are reading on a digital device. Adults 35+ show a higher propensity for print, but readership across platforms is consistent across all age groups.

Magazines AIR 18+	Print Only	Both	Digital Only	Total Reach
18+	39%	26.2%	5.4%	70.2%
18-25	21.8%	25.4%	11.4%	58.5%
25-34	25.6%	29.3%	8.3%	63.2%
35-49	37.2%	28.5%	5.4%	71.0%
50-64	44.3%	25.2%	3.8%	73.2%
65+	54.1%	22.7%	1.7%	78.4%

Source: Vividata 2016 Q1 Readership and Product Database (April 2015 – March 2016 Fieldwork)
Base: Respondents aged 18+, Unduplicated Average Issue Readers

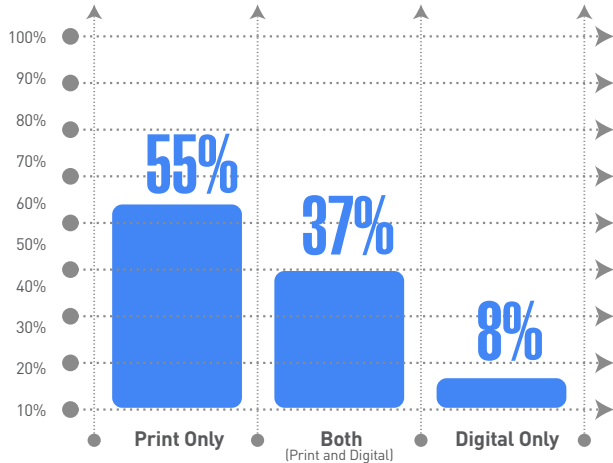
Platform Variation by Magazine Genre (Adults 18+)

Genre	Print Only	Print & Digital	Digital Only
Sports	32%	31%	37%
Business	50%	24%	26%
News	59%	12%	28%
Entertainment	64%	22%	14%
Women's	65%	25%	10%
Food & Beverage	65%	21%	14%
Shelter	72%	18%	10%
General Interest	75%	19%	6%
Mature Market	80%	11%	8%

Source: Vividata 2016 Q1 Readership and Product Database (April 2015 – March 2016 Fieldwork)
Base: Respondents aged 18+, Average Issue Readers

Magazine Readers by Platform (Adults 18+)

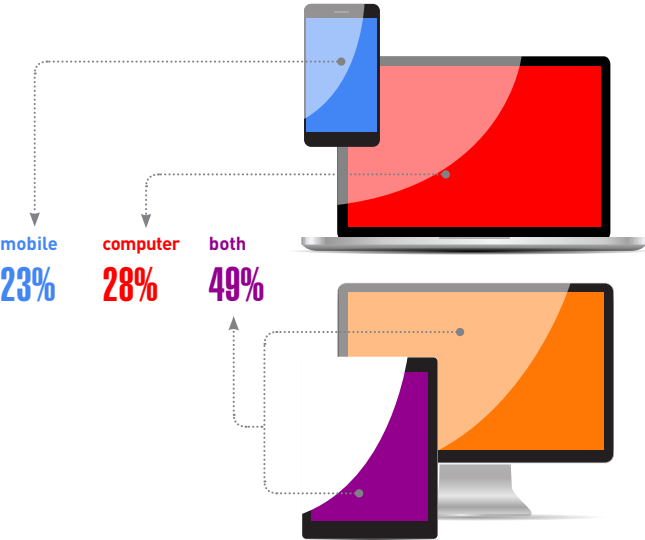
Print remains the dominant platform for magazine readers in Canada today, with digital and cross-platform continuing to grow. Nearly half of the Canadian magazine audience now reads digital products, and 37% are cross-platform (reading via print and digital devices).



Source: Vividata 2016 Q1 Readership and Product Database (April 2015 – March 2016 Fieldwork)
Base: Respondents aged 18+, Unduplicated Average Issue Readers, Any Magazine

Digital Readership by Device (Adults 18+)

Magazines are showing a significant growth in mobile readership. Seven of 10 digital readers read on a mobile device, with 23% reading mobile only.



Source: Vividata 2016 Q1 Readership and Product Database (April 2015 – March 2016 Fieldwork)
Base: Respondents aged 18+, Unduplicated Average Net Digital Readers, devices used to read in the past month

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Magazine Topline Readership Vividata 2016 Q1

12+ Average Issue Audience (000)

Title	Net Digital/ Print (1)	Print (2)	Digital (3)
Any Magazine English/French (4)	21856	20144	10073
English Magazines			
Any Magazine English (4)	19155	17511	8621
Air Canada enRoute	1737	1570	337
AMA Insider (Westworld Alberta)	672	648	99
Best Health	888	634	443
CAA Magazine	3116	3032	543
CAA Manitoba (Going Places)	210	198	32
CAA Saskatchewan (Westworld Sask)	181	173	23
CAA Alberta/Manitoba/ Saskatchewan (5)	1062	1018	154
Canada's History	1009	776	408
Canadian Business	1140	825	537
Canadian Geographic	3626	3122	1178
Canadian House & Home	2034	1802	592
Canadian Living	3842	3321	1191
Chatelaine	3184	2894	826
Cineplex Magazine	4382	3755	1555
Cottage Life	1557	1363	423
Elle Canada	1593	1347	551
Fashion Magazine	1399	1141	575
Financial Post Magazine	1289	829	685
Flare	947	811	321
Food & Drink	2234	2093	413
Glow	778	633	338

Title	Net Digital/ Print (1)	Print (2)	Digital (3)
English Magazines (Continued)			
Good Times	641	544	190
Hello! Canada	1202	934	453
LouLou (Eng)	708	566	300
Maclean's	2351	1619	1015
Moneysense	1386	984	648
Now	527	442	208
Ontario Out Of Doors	583	528	134
Our Canada	1197	1033	333
Outdoor Canada	1843	1638	564
Parentscanada	1001	808	480
People	3361	2618	1363
Professionally Speaking	595	500	200
Reader's Digest	4528	4249	872
Report On Business Magazine	1529	1132	723
Sportsnet Magazine	1912	868	1480
Starweek	796	705	198
Style at Home	1750	1554	513
The Hockey News/ The Hockey News Magazine	1920	1448	1126
Today's Parent	1746	1397	747
Toronto Life	1108	890	478
Vancouver Magazine	245	225	63
Western Living	424	389	91
Zoomer Magazine	1502	1307	408

Title	Net Digital/ Print (1)	Print (2)	Digital (3)
Any Magazine English/French (4)	21856	20144	10073
French Magazines			
Any Magazine French (4)	4740	4367	2093
5 ingrédients-15 minutes	360	327	113
7 Jours	618	581	101
Bel Âge magazine	760	720	107
Châtelaine (Fr)	773	690	159
Chez Soi	372	339	80
Clin d'oeil	559	508	104
Cool!	274	260	51
Coup de pouce	1262	1085	349
Dernière Heure	171	143	50
Échos Vedettes	173	153	31*
Elle Quebec	623	564	114
Enfants Québec	211	164	86
La Semaine	435	386	86
L'actualité	894	678	329
Le Magazine Cineplex	667	573	225
Les Affaires/Les Affaires Plus	615	404	325
Les Idées de ma Maison	636	562	144
LouLou (Fr)	248	218	67
Magazine Espaces	188	158	52
Ricardo Magazine	1467	1043	898
Sélection du Reader's Digest	728	689	100
Star Système	260	229	63
Summum	279	269	71
Touring (French & English)	889	851	146
TV Hebdo	324	262	113
Véro Magazine	560	499	131

Notes:

(1) Net Digital/Print = Unduplicated audience of Print and Digital.

(2) Print = Average issue audience of the printed magazine within the qualifying time period (yesterday up to past 3 months, depending on the publication frequency of the magazine).

(3) Digital = Audiences who read or looked into digital content within the qualifying time period (yesterday up to past 3 months, depending on the publication frequency).

(4) Any Magazine = Unduplicated average audience of all measured magazines.

(5) Summary of AMA Insider (Westworld Alberta), CAA Manitoba (Going Places), CAA Saskatchewan (Westworld Saskatchewan)

* Data relatively unstable

Source: Vividata 2016 Q1 Readership and Product Database

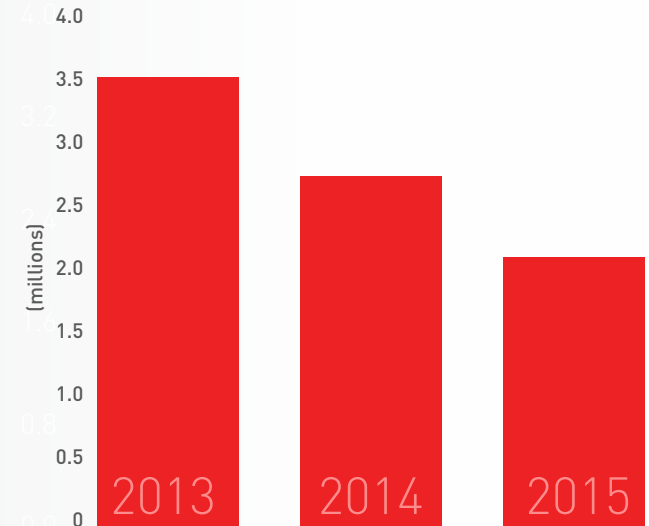
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Canadian Circulation of U.S. Magazines

Publication Name	Total 12/15	Total 12/14	Publication Name	Total 12/14	Total 12/13
ARCHITECTURAL DIGEST	19,818	19,402	MOTOR TREND	17,956	28,026
BETTER HOMES AND GARDENS	22,637	29,322	NATIONAL ENQUIRER	30,015	27,792
BIRDS AND BLOOMS	22,565	26,548	NATIONAL GEOGRAPHIC	17,736	20,180
BLOOMBERG BUSINESSWEEK	20,665	23,736	NATIONAL GEOGRAPHIC	209,010	235,699
BON APPETIT	40,331	44,445	NEW YORKER	29,930	27,951
CAR AND DRIVER	40,164	41,378	O OPRAH	69,728	100,056
CONDE NAST TRAVELER	22,148	26,074	PEOPLE	123,034	129,231
COSMOPOLITAN	94,526	144,276	PEOPLE STYLEWATCH	40,928	48,694
COUNTRY LIVING	33,143	42,815	PLAYBOY	12,485	13,983
DISCOVER	21,403	24,444	POPULAR MECHANICS	34,816	43,177
ECONOMIST (NORTH AMERICAN	68,732	68,237	POPULAR SCIENCE	25,789	32,142
ENTERTAINMENT WEEKLY	18,597	22,740	PREVENTION	77,786	110,908
FAMILY CIRCLE	21,800	28,416	RACHAEL RAY EVERY DAY	16,796	21,763
FAMILY HANDYMAN	21,240	38,563	REAL SIMPLE	27,406	36,783
FINE COOKING	25,053	29,108	ROAD AND TRACK	22,353	24,472
FIRST FOR WOMEN	64,704	75,274	ROLLING STONE	13,616	17,242
FOOD NETWORK MAGAZINE	71,650	71,326	SCIENTIFIC AMERICAN	25,327	30,015
GLAMOUR	20,579	25,087	SELF	15,345	19,350
GOLF DIGEST	39,676	47,308	SEVENTEEN	40,969	61,158
GOLF MAGAZINE	38,836	36,410	SPORTS ILLUSTRATED	38,420	50,788
GOOD HOUSEKEEPING	61,757	75,641	STAR	32,165	24,607
GQ GENTLEMEN'S QUARTERLY	26,857	32,128	TASTE OF HOME	45,219	54,311
HGTV MAGAZINE	30,745	23,790	TIME	36,667	43,831
HOUSE BEAUTIFUL	22,843	21,589	US WEEKLY	34,358	45,390
IN STYLE	65,192	65,500	VANITY FAIR	53,155	53,610
IN TOUCH WEEKLY	55,056	96,539	VOGUE	51,264	52,323
LIFE & STYLE WEEKLY	35,341	48,715	WEIGHT WATCHERS	25,361	34,384
MARIE CLAIRE	11,299	20,098	WIRED	16,373	21,143
MARTHA STEWART LIVING	31,453	49,559	WOMAN'S DAY	50,617	55,611
MAXIM	11,693	23,356	WOMAN'S WORLD	89,854	88,722
MEN'S HEALTH	53,919	94,181	WOMEN'S HEALTH	60,677	107,199

Source: AAM – Dec 2014, 2015 Report

Total Canadian Circulation of U.S. Magazines



Number of U.S. Magazine Titles in Canada with Circulation Over 25,000



*Source: AAM – Dec 2013, 2014, 2015 Report

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Online has fundamentally changed many aspects of life, particularly where printed matter is concerned.

For example, phone directories, both white pages and yellow pages, have virtually disappeared. Other media, such as out-of-home, while embracing digital technology, are thus far immune to the online assault.

One serious victim is the business press.

Readership of printed business magazines has steadily declined, with only 12.5% of professionals and senior managers/owners having read the last issue of any one of the top three national business magazines, according to Vividata's Q1 2016 survey. This is a staggering 59% drop from the 10-year-old PMB 2006's number of 30.5%. It should be noted that the current readers of these publications are of high quality: they are well educated, earn a high income and occupy senior business positions, although a quarter of them are 65 and older. While this readership drop significant, it is hardly surprising. The world has changed.

Business life has been revolutionized by the Internet. Business insight is available from a broad range of sources from Canada and around the world. The business community has moved to their computer desktops, tablets and smartphones for business news and information. Fortunately for Canada's business press, they have followed their audiences' media consumption trends by migrating their content online, allowing for more timely and robust content delivery.

This shift has been less pronounced in the vertical trade press. Shielded by a historical lack of accountability and sustained by low levels of competition, many trade



publications continue business as usual. Certainly not all—there are many vertical trade magazines with excellent online platforms. Many others simply make their printed edition available online in pdf format. Not that one can blame them. If an advertiser needs to reach the pulp and paper or fur trades,

they only have one choice: *Pulp & Paper Canada* (which has a decent website) or *The Canadian Trapper* (which doesn't have one at all).

Business publishers who pay attention to the shifting media consumption patterns of the Canadian business audience and continue to provide a product that meets their needs will flourish. Those who don't will perish. ●

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**Contributed by Rahul Sethi,
Insights Manager, Vividata**

BUSINESS PUBLICATIONS

Business publications are the second largest classification of magazines with 94 industry segments represented by 694 titles, according to Canadian Advertising Rates and Data (CARD). The top business publication segments are:

- Business – 94 titles
- Medical – 68 titles
- Automotive – 36 titles
- Engineering & Construction – 31 titles
- Building – 26 titles

Of the 694 business publications, 602 are offered in English, 151 in French, and two in other languages (Spanish and Russian).

READERSHIP AND CIRCULATION

The larger general business titles can be measured on their relevant target audience readership using Vividata; specifically MOPEs (Managers/Owners/Professionals/Executives), SPBMs (Select Professionals & Business Managers) or BPI (Business Purchase Influence). It is advantageous to also consider the targeting ability of general interest publications when planning for a professional or business demographic target group. Other broader, general titles can capture this business professional and deliver reach to a B2B print campaign.

Third-party circulation verification and sector distribution should be reviewed when developing a business campaign. Sources include Alliance for Audited Media (AAM), Canadian Circulations Audit Boards (CCAB), and publishers' claimed circulation figures and audience profiles.

FARM PUBLICATIONS

CARD also devotes a separate section to farm publications. Of the 88 titles published in Canada, there are 69 English and 25 French titles; six titles are published in both French and English. Farm publications are further categorized by topic as follows:

- General – 32 titles
- Livestock – 24 titles
- Crops – 18 titles
- Community – 7 titles
- Dairy – 7 titles

Leading titles include *Farming for Tomorrow*, *AgDealer/ Agricole Journal*, *Canola Digest* and *Alberta Farmer Express*. The majority of farm magazines focus on key specializations within the farming segment and may also have a regional skew.

MEDICAL JOURNALS

There are 73 medical publications listed in CARD. Medical publications include those focused on general medicine/family practice, as well as specialty topics such as cardiology and neurology.

Measurement of medical publication readership and/or circulation is undertaken by three research organizations: CCAB, AAM and Canadian Association of Medical Publishers MMS.

BUILDING, ENGINEERING AND CONSTRUCTION PUBLICATIONS

There are 26 building publications and 31 engineering/construction publications listed in CARD, serving the contracting, building maintenance and design industries. Only a select few are audited for circulation, with the majority providing publishers' claimed circulation figures. The buyer/advertiser should always seek third-party circulation verification if possible and, when not available, should ask for additional information from the publisher to verify up-to-date circulation/distribution. ●

Sources: CARDonline, July 2016
www.cardonline.ca

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CONTACT SOURCES FOR MORE INFORMATION**ALLIANCE FOR AUDITED MEDIA**

151 Bloor Street West, Suite 850
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www.auditedmedia.com

The Alliance for Audited Media is a non-profit industry body founded by the Association of National Advertisers to ensure media transparency and trust. AAM provides independent verification and information services for thousands of leading publishers, advertisers, ad agencies and ad tech platforms to facilitate the planning, buying, selling and delivery of traditional and digital media. The organization is also one of the industry's most experienced providers of technology certification audits to standards established by the Media Rating Council, Trustworthy Accountability Group, Interactive Advertising Bureau and Mobile Marketing Association.



For more information contact:
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CCAB, DIVISION OF BPA WORLDWIDE**Canadian head office:**

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 Phone: (514) 845-0003
www.bpaww.com

CCAB, BPA Worldwide's Canadian division, audits more than 300 properties under the CCAB and iCompli brands. Media properties audited under the CCAB brand are subject to the standards set by BPA's board and committees and include business publications, consumer magazines, and community and daily newspapers. Properties audited under the iCompli brand are subject to the standards set by organizations and industries outside of BPA, such as flyer accreditations performed to the standards established by Flyer Distribution Standards Association (FDASA). Another service offering under our iCompli banner is CASL Guard which helps media owners and advertisers assess compliance under Canada's Anti-Spam Legislation (CASL).

Business publications and consumer magazines release two brand reports each year, while community and daily newspapers release one annual brand report. Community and daily newspapers report top-line circulation and

audience data in quarterly TRAC reports. CCAB's brand reports and TRAC data can be accessed by visiting their website, www.bpaww.com, or by emailing Tim Peel. CCAB also issues a monthly newsletter.



For more information contact:
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CARDONLINE

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www.cardonline.com

CARDonline is the essential tool for Canadian media buyers and planners. CARDonline provides critical advertising rates, data and media planning information for advertising, marketing, PR and communications professionals.



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CANADIAN MEDIA DIRECTORS' COUNCIL

MAGAZINES CANADA

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Magazines Canada is the national trade association representing Canadian-owned, Canadian-content consumer, cultural, specialty, professional and business media magazines. French and English member titles offer a wide range of topics including business, professional, news, politics, sports, arts and culture, leisure, lifestyle, women and youth, made available on multiple platforms. The association focuses on government affairs, services to the advertising trade, circulation marketing and the development of career skills for and the recognition of excellence among the people who work in Canada's magazine media.



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For more information contact:
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VIVIDATA

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Vividata is Canada's authoritative source of print and digital audience data for magazines and newspapers. Founded in 2014, Vividata is the amalgamated organization of two media measurement bodies, NADbank and PMB.

Vividata's single-source survey provides cross-platform audience measurement for 70+ consumer magazines and 70+ daily newspapers, surveyed across 50 markets. Results include average issue readership by platform, unduplicated reach by publication and other qualitative metrics.

A tripartite, not-for-profit organization, Vividata is governed by a board of directors representing the interests of Canadian publishers, agencies and advertisers. Vividata is committed to providing their 500+ members with up-to-date audience research and insights relevant to today's media industry.



For more information contact:
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E: sara@vividata.ca

Out of home (OOH) is one of the oldest forms of advertising there is, reaching consumers no matter what their media consumption habits are.

What better way to talk about all things out of home than to speak with someone with 20+ years of experience in the advertising industry? Kristine Lyrette, President at Zenith Media touches on a number of topics, from current trends to the future of OOH.

How does the evolution of digital fit in with OOH?

Digital has only strengthened the use of out of home. What makes a strong out-of-home campaign is to incorporate a digital element such as social media to maximize the campaign success. In an era of selfies, companies constantly explore new ways to incorporate this trend, allowing consumers to interact with the brand. Digital out-of-home campaigns have included advertising contests that give consumers the chance to enter and win a prize if they snap a picture of themselves using a product. The picture is then posted on their social network feeds with a designated hashtag, allowing the company to feature the post or picture online and on a digital billboard.

The popularity of digital billboards has increased among advertisers as they provide shorter lead times and the ability for brands to be more reactive to their environment. For instance, temperature sourcing has allowed brands to utilize sensors on billboards, allowing the message to change based on the current weather conditions in the area.

Fundamentally, the world of advertising has changed from what it was even a year ago. The consumer's journey has transformed with it and it's our job to keep up with the change.

What is one of the big trends in outdoor media?

A big trend we're seeing is the use of beacons. Beacons are small, easy-to-place devices that enable context-aware

Kristine Lyrette | President, Zenith Media



mobile interactions through the use of bluetooth low energy. This is a frequency chip found in most devices on smartphones. Mobile connectivity further enhances outdoor media as it

provides the ability to reach consumers by tapping into multiple platforms. Companies that offer this beacon service work with brands to set up beacon zones delivering geo-targeted and contextually relevant messages to people standing by or within the vicinity of the beacon. Beacon-enabled out-of-home structures can send notifications or offers to mobile devices, providing the consumer the right to accept or decline. The offer is typically an extension to the creative seen on billboards. For instance, a consumer waiting at a bus stop may see a digital transit shelter poster advertising a new summer beverage. If the consumer is within that designated beacon's range, they may receive a notification offering them a discount on the new beverage if they head to the store nearby.

How has transit advertising evolved over the years?

Transit ads are an effective way to connect with commuters heading to and from work, reaching large numbers of consumers on a frequent basis. Whether they take the subway, bus, drive or walk, this media channel takes a number of forms, which has allowed brands to become more creative with their executions.

CANADIAN MEDIA DIRECTORS' COUNCIL

Transit shelter ads have evolved in a number of innovative ways. Interactive screens are now being introduced in parts of Canada, allowing commuters to touch the screen and either play a game or watch a trailer. Moving away from the screen, entire bus shelters have been transformed into a 3D advertisement. For example, Ferrero Rocher turned an entire shelter into a box of chocolates, which garnered a lot of attention amongst pedestrians, who took photos and shared them through social media.

While standard transit ads are still popular, brands have moved beyond classic posters to covering entire busses or subway cars. Even custom subway station dominations have become increasingly popular in major cities. Taxi ads have now moved inside as well. Digital screens in some cabs are now positioned by the head rest behind the driver.

When recommending OOH in a media plan, how can you guarantee your clients' ads are being seen?

Many out-of-home vendors offer a distance test tool to ensure the ad is visible on a number of outdoor and indoor products. This is an important tool because, as an agency, we need to ensure our clients' creative is being seen in a clear and impactful way from any distance. What works up close doesn't necessarily mean it will have the same impact at a further distance.

Where do you see OOH in the next five years?

Out-of-home advertising has seen tremendous growth in recent years and will continue to adapt and evolve with the market shifting towards digitization. A media once dominated by static posters and billboards now offers much more opportunity to connect with consumers on an esthetic and interactive level. Buying outdoor advertising will shift towards a programmatic model. It's already begun: Campsite was recently introduced in Canada as a new buying platform for digital out-of-home inventory, specifically for restobar screens. The platform provides media buyers access to a large digital inventory. The system runs on a cost-per-view billing metric and offers precise audience targeting. Buyers have the ability to purchase and activate campaigns in a matter of minutes with the option to even select certain periods of the day, depending on the campaign. Most restobar screens are activated by motion so the ad will not be continuously playing on a loop without anyone around. Our OOH partners know the importance of viewability and having the opportunity to buy on a cost-per-view basis in out of home is a step in the right direction. ●

The out-of-home medium has been evolving to provide a more immersive, dynamic and responsive set of interactions between people and brands, further embedding the presence of OOH as an essential gateway on the path to purchase.

Data and technology continue to fuel new opportunities for marketers to interact with consumers, while providing new ways to evaluate OOH's ROI.

While the media landscape has become more fragmented and consumers are increasingly avoiding advertising, attention and recall of OOH advertising remains high. The scale and visual imagery of the world's largest and oldest screen creates a strong and memorable brand presence.

OOH advertising connects with consumers at relevant moments. Biometrics research provides an understanding into consumers' state of mind when they are inside and outside their home. The findings reveal that when consumers are out of home they are more alert and likely to act on messages than compared to inside the home. OOH reaches consumers in an ultra-absorbent state of mind with a message that interweaves them with the brand. OOH advertising provides moments of positive disruption, adding something and giving choice without being interruptive as people go about their daily lives.

Findings from the TouchPoints Canada multi-media study reveal the high correlation between exposure to OOH media and purchase decisions. Almost three quarters (72%) of consumers are reached by OOH in the same half-hour that they make a purchase decision across all categories measured. And, as consumers rarely



leave their home without their mobile device, OOH can trigger mobile use to search for more information about a brand or activate conversations that help to create brand familiarity and loyalty.

The OOH media landscape will continue to evolve rapidly, which is why OMAC and COMB have launched a new OOH certification program to provide planners with a

comprehensive understanding of OOH. The course consists of five modules covering OOH products and networks, campaign planning resources, audience measurement, effectiveness and strategic uses of OOH and creative guidelines. Each module uses a web-based testing platform and/or hands-on software exercises. Participants have the option to take the course online, or on-site training can be scheduled.

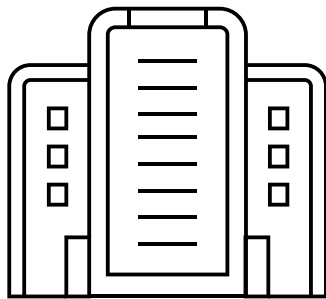
For more information about OMAC or COMB, please contact Rosanne Caron at rcaron@omac.comb.org or 416.968.3435 x108. ●

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OUT-OF-HOME FORMATS

Standardized Large Format Displays

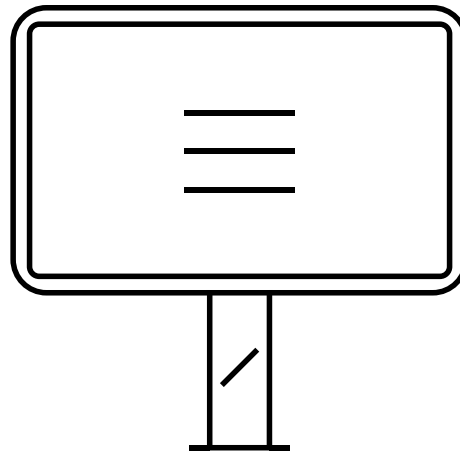
Intended to be viewed from distances of at least 50 feet. Many of these formats are also available in digital in large markets



Murals

Large format

Highly customizable displays on the sides of downtown buildings

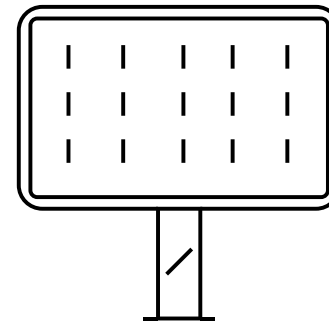


Superboards and Spectaculars

Series 10: 10x40

Series 14: 14x48

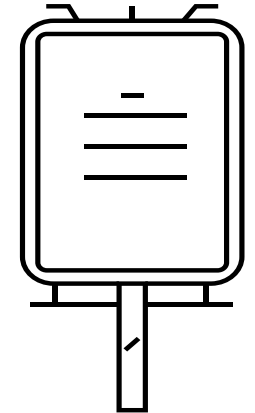
Highly customizable displays in high traffic areas



Trivisions/Trios

Horizontal or Vertical

Posters that rotate between three advertising faces

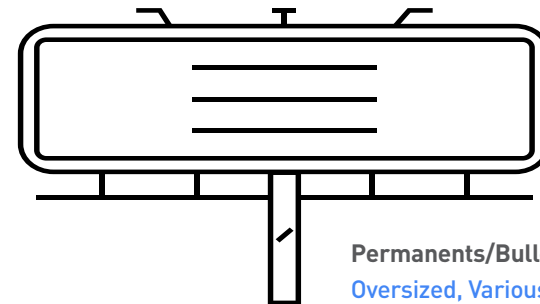


Posters

12x16, 10x20

Vertical or Horizontal

Often illuminated from front



Permanents/Bulletins

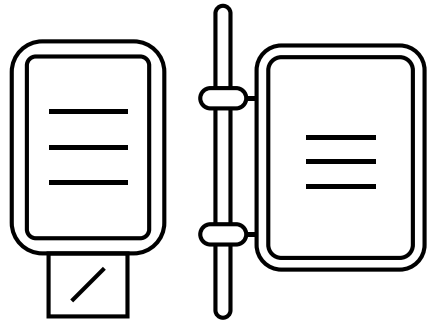
Oversized, Various Sizes

Highly customizable displays in high traffic areas

Street Furniture

Various sizes and formats

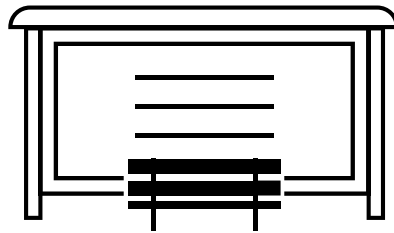
Advertising displayed at eye level or curbside to reach pedestrians and vehicular traffic



Street columns

4x6, various sizes

Rear illuminated,
at street level



Transit Shelters

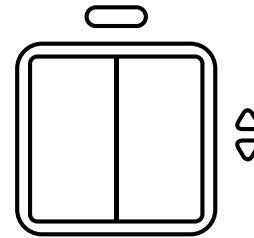
4x6

Rear illuminated

Indoor

Various sizes and formats

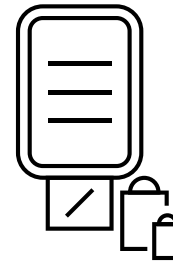
Advertising displayed at eye level to reach pedestrians in clustered environments



Elevator

Varies

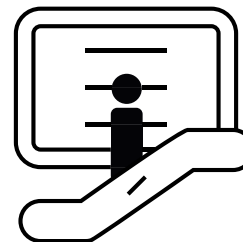
Includes the digital screens in elevators that sell ads on a portion of the screen and the posters on the walls



Mall Posters

4x6

Rear illuminated



Indoor Posters

Varies

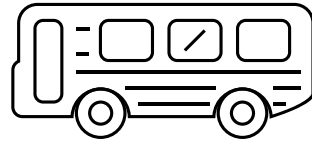
Backlit, can target a specific environment
(theatres, gyms, etc.)

CANADIAN MEDIA DIRECTORS' COUNCIL

Transit

Various sizes and formats

Advertising that is positioned around transportation hubs (such as transit stations, terminals and airports) and displays that are attached to moving vehicles



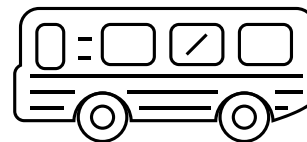
Full Wraps

All sides of the vehicle (bus, subway car or streetcar) are wrapped



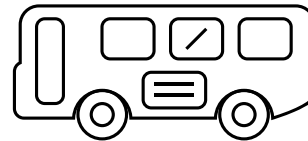
Bus Backs

Covers the back of the vehicle only



Bus Murals

Driver's side wrapped only



King Posters

30x139

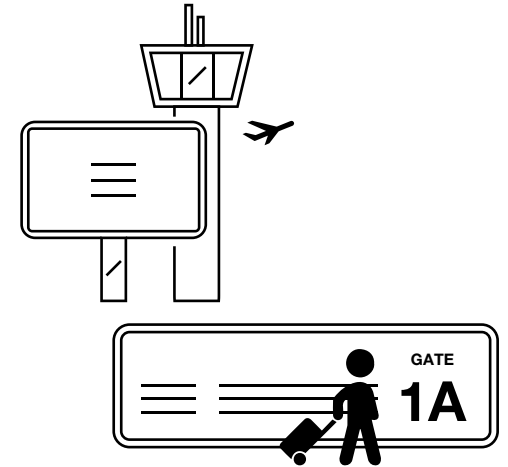
Ads in aluminum frames on the side of a bus



Seventy Posters

21x70

Ads in aluminum frames on the side or rear of a bus

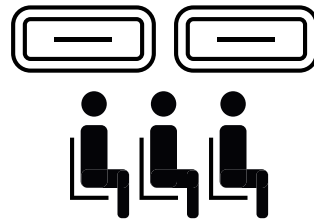


Airport

Multiple units

All advertising found in terminals and on the airport grounds. Includes kiosks, pillar wraps and superboards

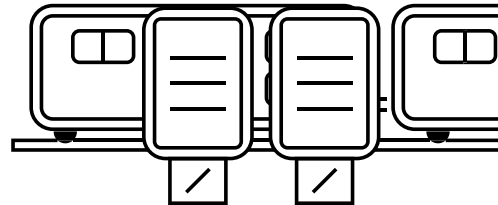
Transit (Interior)



Transit Posters

35 x 11
70 x 11

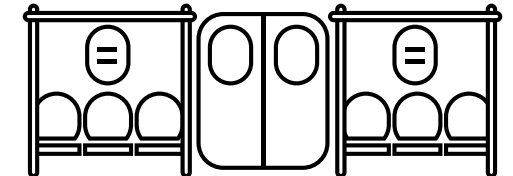
Mounted above windows inside of the vehicles



Station Posters

47 1/4 x 68 1/4

Located on subway and commuter train platforms



Door cards/Vertical Posters

20x28

Posters beside the door of a subway car, can be customizable

Media Channels

OUT OF HOME

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Edmonton: 3,286 Faces

Outdoor Summary:

1,173 Posters
17 Backlit Posters
82 Superboards
917 Street Furniture Faces
1 Mural

Indoor Summary:

1,069 Faces in the College/University network
27 Faces in the Arena network

Vancouver: 9,256 Faces

Outdoor Summary:

1,265 Posters
72 Superboards
3,475 Street Furniture Faces

Indoor Summary:

2,283 Faces in the Resto-Bar network
147 Faces in the Beauty network
1,115 Faces in the College/University network
889 Faces in the Arena network

Toronto: 17,645 Faces

Outdoor Summary:

4,183 Posters
85 Backlit Posters
208 Superboards
8,180 Street Furniture Faces
35 Murals

Indoor Summary:

2,725 Faces in the Resto-Bar network
436 Faces in the Beauty network
1,793 Faces in the College/University network

Ottawa-Gatineau: 1,756 Faces

Outdoor Summary:

648 Posters
2 Backlit Posters
6 Superboards
1,100 Street Furniture Faces

Montreal: 10,319 Faces

Outdoor Summary:

1,884 Posters
3 Backlit Posters
217 Superboards
4,663 Street Furniture Faces
1 Mural

Indoor Summary:

2,348 Faces in the Resto-Bar network
280 Faces in the Beauty network
923 Faces in the College/University network

St. John's: 146 Faces

Outdoor Summary:

140 Posters
6 Superboards

Victoria: 306 Faces

Outdoor Summary:

21 Posters
3 Superboards
282 Street Furniture Faces

Calgary: 4,023 Faces

Outdoor Summary:

959 Posters
22 Backlit Posters
34 Superboards
950 Street Furniture Faces
3 Murals

Indoor Summary:

477 Faces in the College/University network
1,578 Faces in the Arena network

Winnipeg: 1,014 Faces

Outdoor Summary:

591 Posters
7 Backlit Posters
41 Superboards
375 Street Furniture Faces

Saskatoon: 723 Faces

Outdoor Summary:

327 Posters
2 Backlit Posters
14 Superboards
109 Street Furniture Faces

Indoor Summary:

271 Faces in the Arena network

Halifax: 591 Faces

Outdoor Summary:

354 Posters
14 Superboards
223 Street Furniture Faces

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Out-of-Home Vendors

Standard	Street Level/Furniture	Indoor	Airport	Transit	Digital (Outdoor)
Abcon	Abcon	Abcon	Abcon	Adapt Media	Abcon
Adapt Media	Adapt Media	Captivate	Astral	Astral Media	Adapt Media
Astral Media	Astral Media	Cineplex	Clear Channel	Cogeco Metromedia	Astral Media
Canadian Digital Netowrk	B.K. Corporate Marketing	Clear Chennel	Mango Moose Media	Exclusive Ad Inc	Canadian Digital Network
Cieslok Media	Clear Channel	Cogeco Metromedia	Neotrafic	IMA Outdoor	Cieslok
Cineplex	Grassroots Media	IMA Outdoor	Pattison	Lamar	Cineplex
Clear Channel	Maximum Outdoor	Maximum Outdoor		Pattison	Clear Channel
Cogeco Metromedia	Outfront Media	Media City		Pattison Onestop	Dynamic Outdoor
Dynamic Outdoor	Pattison	Neotrafic		Quebecor Out of Home	Grassroots
Grassroots Media		Newad		Streetseen Media	IMA Outdoor
IMA Outdoor		OFX Media			Maximum Outdoor
Lamar		Outfront Media			Media City
Maximum Outdoor		Pattison Onestop			Neotrafic
Media City		Rouge Media			Outfront Media
Neotrafic		UB Media			Pattison
Outdoor Exposure		Zoom Media			Quebecor Out of Home
Outfront Media					RCC Media
Pattison					
Quebecor Out of Home					
RCC Media					
UB Media					



Direct marketing (DM) is a form of advertising that allows businesses to communicate directly to customers through a variety of media, including cellphone text messaging, email, websites, online advertising, database marketing, flyers, catalogue distribution, promotional letters, targeted television, newspaper and magazine ads, as well as outdoor advertising.

DM encompasses any marketing technique that affords marketers the opportunity to communicate in a targeted or personalized manner with a potential customer.

The real benefit of direct marketing is that it is an interactive system of marketing that uses one or more advertising media to affect a measurable response and/or transaction. It is the notion of one-to-one communication between the marketer and the prospect that distinguishes it from other types of marketing. DM makes an offer and asks for a response. By developing a history of offers and responses, direct marketers gain knowledge of their customers, resulting in more effective targeting.

At a time when marketers are increasingly pressured to drive value and profits, measurability is imperative. Direct marketers can measure the response to an offer. Measurability allows marketers to test a variety of lists, offers, media—virtually any aspect of a campaign—in order to allocate marketing resources to the most effective combination of channels. DM allows marketers to track, measure, analyze and optimize their campaign. At a time when ROI is king and we are held accountable for improved KPIs, DM is a quantifiable tool and important element to advertising campaigns. ●



Sue Alexander Ash | Managing Director, Maxus

Direct Marketing

Contributed By Sue Alexander Ash, Managing Director, Maxus

DIRECT MARKETING

Direct marketing is defined by the Canadian Marketing Association (CMA) as “targeted communications that engage specific audiences through a combination of relevant messaging and offers that can be tracked, measured, analyzed, stored and leveraged to drive future marketing initiatives.” Essentially, what differentiates direct marketing from other marketing forms is a clear, traceable call-to-action. Goals for direct marketing campaigns include acquiring new customers, cross-selling existing customers and customer retention. Common components used in successful direct marketing campaigns include analytics, offer development and privacy management.

ANALYTICS

Data and analytics are utilized to understand consumers, group consumers into segments, and target key individuals. Through data analysis, marketers are better able to create compelling offers that drive the desired response and ROI.

OFFER DEVELOPMENT

The offer entices a consumer to complete a call-to-action. Successful offers are often consumer-segment specific, time- or location-sensitive, and clearly articulate the

value to consumers. Often multi-offer testing is used to gain empirical evidence to determine the best ROI, which can influence the remainder of the campaign and future campaigns.

PRIVACY MANAGEMENT (PIPEDA, BILL C-28, NATIONAL DO NOT CALL)

Privacy management is an increasing concern in direct marketing, especially in digital communications. It is imperative that marketers are aware of and comply with all privacy laws. Breaching privacy regulations may result not only in upset consumers, but also lengthy legal procedures and monetary penalties.

Personal Information Protection and Electronic Documents Act (PIPEDA)

PIPEDA is a federal consumer information privacy law that provides guidelines on notice and consent, data use and retention, data security/management and privacy infrastructure.

Fighting Internet and Wireless Spam Bill C-28

Canada’s Anti-Spam legislation (CASL) requires advertisers to attain consumer consent before sending digital messages, such as emails, text messages and social media messages.

National Do Not Call Registry

The National Do Not Call Registry is part of the CRTC’s Unsolicited Telecommunications Rules that includes: telemarketing rules, national DNCL rules, and automatic dialing and announcing device rules. The rules require that

telemarketers subscribe to, pay fees for, and access the National DNCL. The rules also prohibit telemarketers from calling telephone numbers that have been registered on the national DNCL for more than 31 days. (Source: Government of Canada, Office of the Privacy Commissioner of Canada)

DIRECT MAIL

Common types of direct mail include catalogues, brochures, coupon booklets, envelopes and flyers. Contrary to popular belief, direct mail is not dying. Just over three quarters of Vivdata respondents 18+ read catalogues (77%) and coupon booklets (77%).

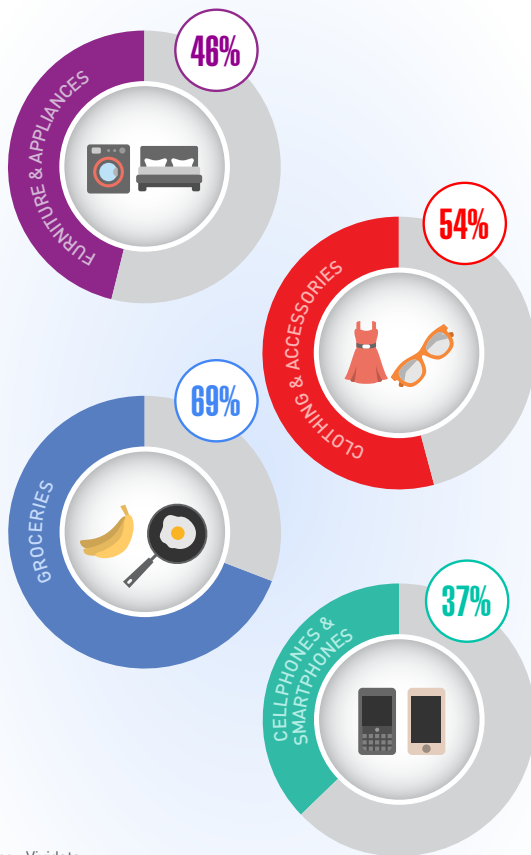
Direct Mail Types — Read/Look Into

	(000s)	%
Catalogues	22,235	77%
Coupon Booklets	22,168	77%
Brochures	21,509	75%
Envelopes	19,951	69%
With Newspapers	12,046	42%
At Your Door	11,916	41%
By Addressed Mail	8,086	28%
Flyers - Polybag/Polysac	7,122	25%
Online	4,221	15%
At Your Retail Store	2,513	9%

Source: Vividata 2016 Q1 Readership & Product Database

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Among consumers who personally use flyers/inserts to make purchase decisions, 46% of consumers rely on them for furniture and appliance purchases, 54% for clothing and accessories, 69% for groceries, and 37% for cellphones and smartphones.



Source: Vividata

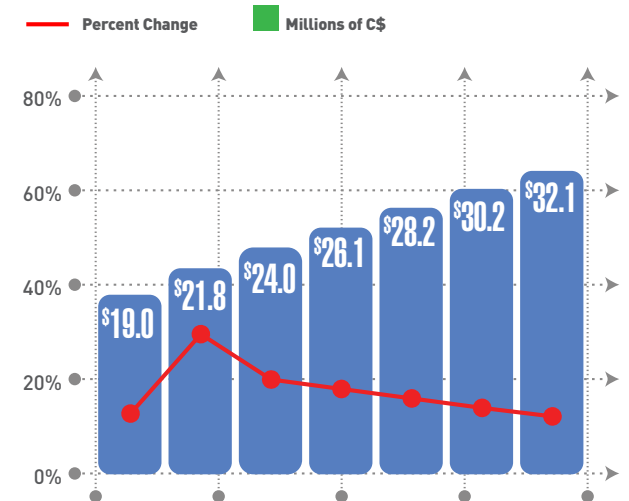
The goal of direct mail is to have customers open/read the communication piece and perform the desired call-to-action, usually in a timely manner. Accordingly, direct mail campaigns focus heavily on creative tactics to entice consumers to open the direct mail piece and take action. Messages are often targeted by geography, life stage or personal interests to ensure the communication is personalized, while still respecting privacy concerns. Effective calls-to-action identify a pain point, propose a remedial action, and frequently offer a discount or reward in exchange for acting now.

Canada Post suggests direct mail is a highly effective way of reaching consumers. The organization claims that 91% of Canadians are likely to open direct mail if it looks official or important, 90% if they recognize the sender, and 89% if it looks interesting or intriguing. In addition, 94% of Canadians are likely to open mail if they already do business with the company.

EMAIL MARKETING

Email marketing most commonly comes in one of four types: welcome messages, newsletters, alerts/notifications, and product/promotional offers. Depending on the type of email, the goal may differ but generally it requires delivery of a concise and timely message that is customized to the recipient, which encourages them to click through to find out more or take an action. Email allows marketers to frequently communicate with consumers who have expressed an interest in their brand, via a cost-effective channel, with the ability for robust measurement and real-time optimization.

Email Ad Spending in Canada, 2014–2020



Source: eMarketer, March 2016

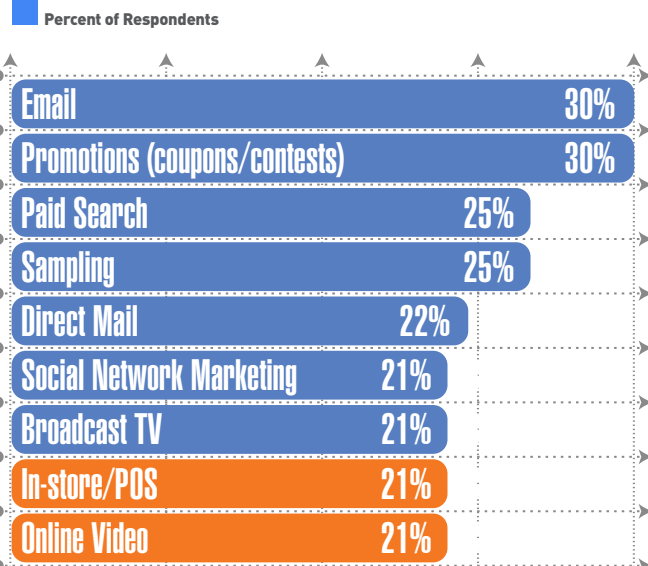
Note: includes advertising that appears on desktop and laptop computers as well as mobile phones, tablets and other Internet-connected devices.

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EMAIL PERFORMANCE BENCHMARKS

The prevailing perception among marketers is that email ROI stacks up well against other forms of marketing. The 2015 Canadian Marketers survey by BrandSpark showed that email (along with promotions like coupons/contests) generated the highest ROI in the past year, with 30% of respondents citing it as the best-performing format.

Marketing Formats that generated the Highest ROI According to Marketers in Canada, March 2015



Source: BrandSpark and Canadian Marketing Association (CMA), 10th Annual BrandSpark Canadian marketers Survey, May 24, 2015

Note: In the past year.

DIRECT RESPONSE MEDIA

Direct response media forms are traditional advertisements that have a clear and traceable direct call-to-action. Common calls-to-action include unique phone numbers, URLs, coupons or texting a response. The primary goal of direct response media is to elicit a specific response from a consumer, rather than to generate brand awareness or influence brand perception.

Direct response TV (DRTV) is different from a brand buy because it focuses less on GRPs and more on cost per minute. The purpose of DRTV is to get an effective ROI (low cost per call, low cost per lead) versus creating an impression. Short-form DRTV can be 15, 30, 60, 90 and 120 seconds in length. Long-format DRTV, also known as infomercials or paid programming is usually 30 to 60 minutes in length. With the right frequency, DRTV can drive response and aid brand awareness.

Direct response radio (DR radio) involves ads that have a call-to-action and a tracking mechanism, for example, a “call now” prompt with a toll-free number or a unique URL. If a telephone number or a URL is the call-to-action, it should be memorable and heard frequently to be effective. DR radio measurement involves calls, orders, customers, leads and sales results from the ads.

CANADIAN MEDIA DIRECTORS' COUNCIL

“Flyers” have become synonymous with retail advertising or weekly item/price advertising.

Where in the past, this form of marketing communications was dominated with the print flyer, today, weekly advertising may also include digital, OOH and ROP media.

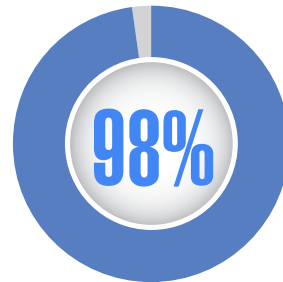
KEY FLYER MEDIA CHARACTERISTICS

- Ongoing weekly messaging
- Focused on direct consumer/sales response (e-comm or in-store)
- Typically item- and price-oriented (product promotions)
- Planned and executed geographically or by store trade area (geo-targeted)
- Data driven and measurable

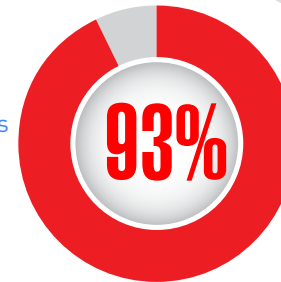
FLYING HIGH

According to the latest Consumer Engagement Study conducted by the Flyer Distribution Standards Association, Canada's retail flyer, unlike in many other countries, is alive and well.

1,178
FLYERS
PER HOUSEHOLD
PER YEAR



98% of Canadians receiving flyers are prompted to take some sort of action as a result

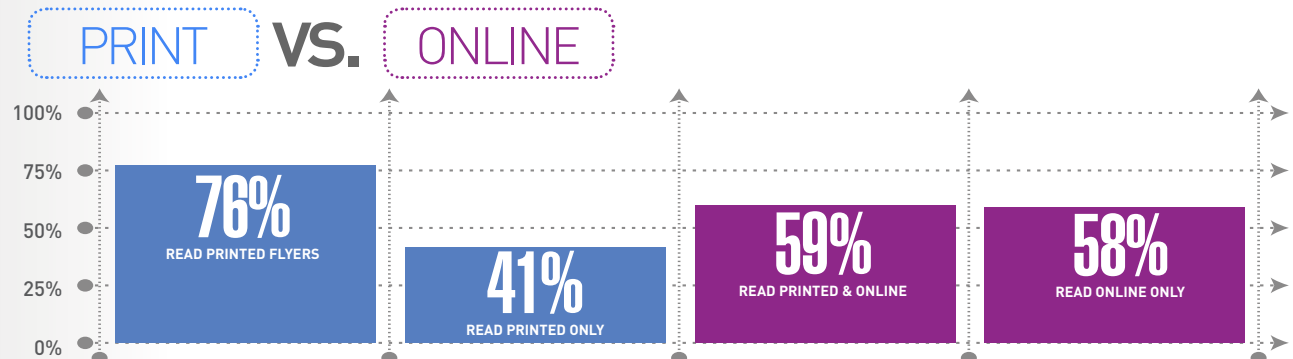


93% reported reading, looking into or accessing a flyer every year



Steve Acland | President, Geomedia

THAT'S 16 BILLION FLYERS DISTRIBUTED TO CANADIAN HOMES EVERY YEAR

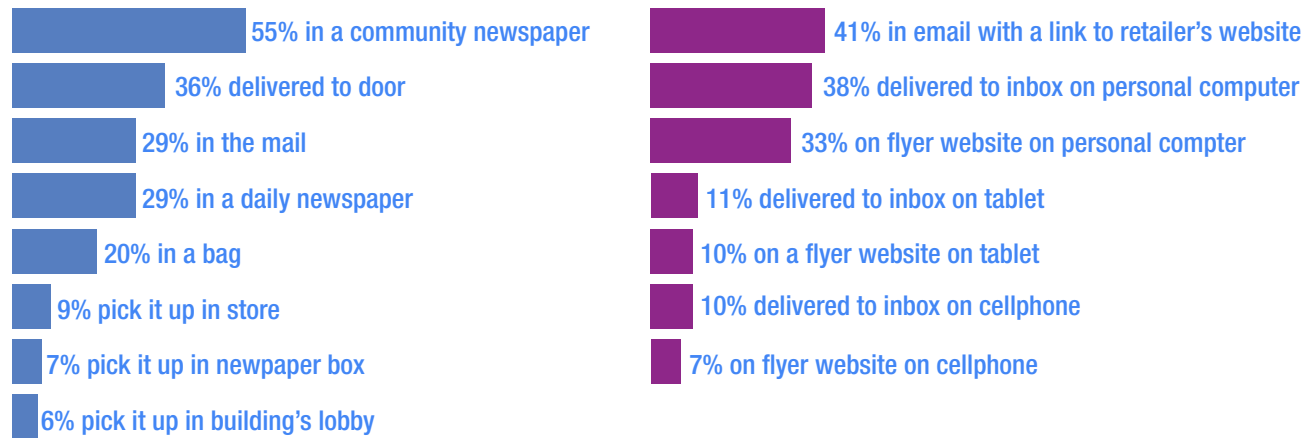


PRINT FLYERS

The printed flyer continues to be the dominant form of weekly advertising for the majority of retailers. The more frequently consumers shop a retail category (for example, grocery and drug stores), the more likely flyer advertising is a key part of their advertising. Increasingly, non-traditional flyer advertisers such as auto companies, telcos and financial services are also using the channel.

There are more than 16 billion print flyers distributed annually in Canada at an investment of more than \$3.3 billion. The “media placement” is approximately 30% of the cost, with the balance made up by pre-press, print production and transportation to the media. The largest single variable is print production, where the stock and number of pages can make a huge difference in the CPM.

PREFERRED METHOD OF FLYER RECEIPT



Source: Consumer Engagement Study, Flyer Distribution Standards Association

PRINT FLYER MEDIA

The print flyer distribution media in Canada have created a very granular selection process that lets advertisers choose relatively small geographic areas and the type of dwelling desired. The networks of community newspapers, daily subscriber newspapers, and flyer delivery services are healthy and growing in terms of the total number of households an advertiser can deliver to. The media principally falls into two categories: subscriber with (or without) extended market coverage and total market coverage.

Subscriber Newspapers: Paid publications published five to seven days a week. Papers are distributed to subscribers (subs) or through single copy sales (SCS). House and apartments are generally not separable.

EMC (Extended Market Coverage): Flyers distributed to non-subscribers of daily newspapers. Delivery is houses and/or apartments and one day a week, usually Wednesday or Friday.

TMC (Total Market Coverage): Community newspapers or flyer delivery services. TMC distributors deliver flyers to all deliverable households within specified geography. Delivery is houses and/or apartments. Canada Post and some distributors also provide coverage to businesses. TMC distributors typically provide the best geographic targeting options.

FLYER TARGETING BY 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 three 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 three digits of the postal code 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 300–600 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 400–700 households. (Prior to 2001 – EA Enumeration Area.)

Distributor Route: Non-standard geography of approximately 100–500 households.

*indicates standard geographic boundaries.

FLYER TARGETING ANALYTICS

Targeting refers to “ranking geography” so that a selection process can choose the areas that meet the budget or predetermined cut-off. Attributes can be assigned based on one or a combination of two or more of the following:

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), also known as FAMEX (family expenditure)
5. Distance or drive time (from store)

Increasingly, advertisers are looking to both print and digital flyers as part of their tool kit for weekly product advertising. There are emerging consumer groups who exclusively look for digital flyers. However, while their rate of growth is high, their absolute numbers are still small. The most valuable retail consumers tend to use both print and digital flyers.

E-FLYERS

It is no longer enough for retailers to offer weekly deals in print. Major retailers are leading the way with digital flyer content that is smartphone- and tablet-friendly, and tied to data-driven loyalty programs.

The print flyer is successfully evolving to the new digital environment and shoppers are increasingly finding that content on their computers, smartphones and tablets. On average, eight million Canadians have downloaded a digital flyer app and over 6.5 million Canadians have visited a branded digital flyer experience in the last 12 months.

Digital flyers offer advantages over their print counterparts. Enhanced content including “how-to” videos and recipes, shopping lists, and product reviews provide valuable consumer content proven to drive both in-store and online revenue.

PERSONALIZED OFFER ENGINES AND E-COMMERCE

The evolution of the digital flyer will also include a personalized offer engine fuelled by loyalty programs and online behaviour data, providing even greater value to consumers. Specialized companies are investing in machine learning technologies to automatically power one-to-one shopper experiences and provide e-commerce functionality.

DIGITAL FLYER CHANNELS

Digital flyer aggregators are investing in technology platforms to improve design, usability and content distribution. These companies are aggregators of online coupons, deals and flyers, providing consumers with access to a wide range of retail flyers in Canada across grocery, pharma, home improvement and apparel.

Social media and programmatic display are the backbone for growing the digital flyer base for leading retailers. They offer flexible and enhanced targeting to effectively reach valuable online consumers.

TARGETING VARIABLES

1. Geography

- Store radius targeting
- Postal code
- FSA

2. Behavioural Targeting

- Product preference
- Category interest

3. Demographic Targeting

- Age, income, ethnicity, language, family size

4. Customer Value

Media software and data services are simply technologies that enable media professionals to become indispensable business consultants.

These tools allow us to work faster and smarter, and to become even more effective problem solvers. More specifically, this means providing greater access to intelligence, enhancing data analysis and insight mining, improving overall efficiencies and accuracy, and ultimately improving our clients' return on investment.

Looking back, our industry has been a leader in enabling technologies, by virtue of managing the sheer amount of data we have generated and manipulated. It's going to keep on getting a whole lot more sophisticated and exciting.

This is arguably one of the most fluid categories in the Media Digest, with a high degree of anticipation and change in its future. The landscape continues to dramatically fragment and data is piling up at record rates. We see strong potential for new opportunities for suppliers in this category.

The most recent example is the launch of TouchPoints, a syndicated consumer and cross-platform research initiative, conducted by RealityMine. The study has added a new, desired dimension to the established media and consumer studies of Vividata and Numeris.

In the last couple of years, we have witnessed the proliferation of third-party data, which allows agencies to scale and complement first-party data with increasingly relevant targeting options. As part of the larger



advertising technology ecosystem, third party provides a reliable and intuitive opportunity to create and prioritize custom audience segments.

For the current landscape, we have grouped the suppliers into categories of similar offerings, recognizing there will be overlap, with some companies sitting in more than one category.

Expect to see more change, growth and innovation as enabling technologies provide more opportunities for better solutions. ●

CANADIAN MEDIA DIRECTORS' COUNCIL

ENTERPRISE SOFTWARE

- Control hub for media operational functions: buying, workflow, finance

MEDIA PLANNING SOFTWARE

- Provider of tools and graphics in data management to apply to media planning

AUDIENCE & CONSUMER INTELLIGENCE

- Access to audience data, analysis and insights

THIRD PARTY AD TRACKING

- Management and tracking of online advertising

AD SALES & COMPETITIVE REPORTING

- Tracking advertising expenditures, sales and inventory data

THIRD PARTY DATA PROVIDERS

- Creating custom consumer segments for targeted ads and marketing messages with third-party data, typically gathered through anonymized online behaviour

MISCELLANEOUS

- Creative distribution
- Social distribution & monitoring
- Direct TV software solutions

ENTERPRISE SOFTWARE**FUIMUS CORPORATION**

Advertising Agency Management Systems
80 Kingsmount Park Road
Toronto, ON M4L 3L4
Phone & Fax: (416) 601-1744
www.fuimus.com

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C/O IMAGINE COMMUNICATIONS**

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Montreal:
390 Rue Lemoyne
Montreal, QC H2Y 1Y3
Phone: (514) 824-0101
www.imaginecommunications.com

MEDIAOCEAN

12 St. Clair Ave. West, Suite 1500
Toronto, ON M4V 1L5
Phone: (416) 929-3372
Toll-free: 1-877-433-7226 (support)
Toll-free: 1-866-376-4819
www.mediaocean.com

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MEDIA PLANNING SOFTWARE**NIelsen IMS**

151 Yonge Street, 11th Floor
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Phone: (416) 961-2840
www.nielsen.com/ca

Provider of media planning and analysis software for both industry and proprietary research. Provides access to syndicated studies such as Vividata, Numeris RTS and TouchPoints.

NLOGIC

1500 Don Mills Road, 3rd Floor
Toronto, ON M3B 3L7
Phone: (416) 445-8881
Fax: (416) 445-8406

Provider of audience analysis tools for the TV and radio broadcast industry, media agencies and advertisers.

TELmar HMS LTD.

36 King Street East, 4th Floor
Toronto, ON M5C 3B2
Phone: (416) 487-2111
www.telmar.ca

Provider of media planning software and consulting services with 13 offices worldwide.

AUDIENCE & CONSUMER INTELLIGENCE**CANADIAN OUT-OF-HOME MEASUREMENT BUREAU (COMB)**

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Fax: (416) 968-9396
www.comb.org

The industry standard for measurement of OOH advertising audiences across Canada. It publishes circulation and market data for more than 280 markets.

COMSCORE

90 Sheppard Avenue East, Suite 100
Toronto, ON M2N 3A1
Phone: (416) 646-9900
Fax: (416) 642-1007
www.comscore.com

Internet analytics company providing marketing data and analytics to agencies and publishers.

NIelsen CANADA

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

Provider of audience and advertising data including advertising effectiveness, advertising expenditure and print advertising data, as well as measurement and

analysis of marketplace dynamics and consumer attitudes and behaviour.

NUMERIS

1500 Don Mills Road, 3rd Floor
Toronto, ON M3B 3L7
Phone: (416) 445-9800
Fax: (416) 445-8644

Source of broadcast measurement and consumer behaviour data for broadcasters, advertisers and agencies.

REALITYMINE

160 Bloor Street East, Suite 1005
Toronto, ON M4W 1B9
Phone: 416-930-5982
www.realitymine.com

Provides single-source cross-platform research and “day-in-the-life” consumer insight data.

VIVIDATA

77 Bloor Street West, Suite 1101
Toronto, ON M5S 1M2
Phone: (416) 961-3205
Fax: (416) 961-5052
www.vividata.ca

The amalgamated organization of PMB and NADbank provides data on print readership, non-print media exposure, product usage, retail and lifestyle data.

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THIRD PARTY AD TRACKING

ATLAS BY FACEBOOK

www.atlassolutions.com

Remotely hosted ad server for advertisers and publishers with rich media support. Search campaigns management and site optimization.

DOUBLECLICK by GOOGLE

www.doubleclick.com

Provides ad management and tracking for online advertising. Primarily used by sites.

EYEReturn

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Toronto, ON M4P 2Y1
Phone: (416) 929-4834
Toll-free: 1-866-878-3335
www.eyereturnmarketing.com

Full service online campaign creation, trafficking, reporting and ad verification.

SIZMEK

401 Park Ave South, 5th Floor
New York, NY 10016
Phone: (646) 202-1320
www.sizmek.com

Open ad management stack to help marketers manage, deliver and optimize digital campaigns across any screen.

AD SALES AND COMPETITIVE REPORTING

COMSCORE

90 Sheppard Avenue East
Suite 100
Toronto, ON M2N 3A1
Phone: (416) 646-9900
Fax: (416) 642-1007
www.comscore.com

Internet analytics company providing marketing data and analytics to agencies and publishers.

LEADING NATIONAL ADVERTISERS-LNA

(a division of Nielsen IMS)
151 Yonge Street, 11th Floor
Toronto, ON M5C 2W7
Phone: (416) 961-2840
Fax: (416) 644-3530

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

KANTAR MEDIA

www.kantarmedia.com

Provides strategic expertise, competitive intelligence, consumer behaviour, audience research, digital insights and social media influence.

MARKETRON INTERNATIONAL CANADA INC.

4576 Yonge St., Suite 400
North York, ON M2N 6N4
Phone: (416) 221-9944
Fax: (416) 981 8766
www.marketron.com

TC software to track broadcast sales and inventory data.

NIelsen MEDIA RESEARCH CANADA

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

Provides a summary of national advertising expenditures by medium.

NLOGIC

1500 Don Mills Road, 3rd Floor
Toronto, ON M3B 3L7
Phone: (416) 445-8881
Fax: (416) 445-8406

Provides competitive advertising intelligence across multiple media channels.

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THIRD PARTY DATA PROVIDERS**ADDTHIS**

1595 Spring Hill Road, Suite 300
Vienna, VA 22182
Phone: (703) 677-3999
www.addthis.com

BLUEKAI - ORACLE

Oracle Corporation
500 Oracle Parkway
Redwood Shores, CA 94065
Phone: 1 (800) ORACLE1
Email: marketing@bluekai.com

CROSS PIXEL MEDIA

229 West 28th Street, Suite 400
New York, NY 10001
Phone: (646) 380-3663
www.crosspixel.net

EXELATE – A NIELSEN COMPANY

7 West 22nd Street, 9th Floor
New York, NY 10010
Phone: (646) 380-4400
www.exelate.com

LOTAME

440 9th Avenue, 18th Floor
New York, NY 10001
Phone: (646) 556-6300
Email: info@lotame.com
www.lotame.com

NEUSTAR

21575 Ridgeway Circle
Sterling, VA 20166
Phone: (855) 898-0036
www.neustar.biz

MISCELLANEOUS**CORE DIRECT**

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

Provides syndicated software solutions for DRTV.

EXTREME REACH/MIJO

635 Queen St. E
Toronto, ON M4M 1G4
Phone: (416) 964-7539
Toll-free: 1-800-463-6456
Fax: (416) 964-5920
www.mijo.com

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

SYSOMOS

25 York Street
Suite 900, PO Box 403
Toronto, ON M5J 2V5
www.sysomos.com

Social media analytics and monitoring solution.

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TERM	MEDIA	DEFINITION
BROADCAST		
APPOINTMENT TV:	Broadcast	Appointment TV assumes that people will tune in at the same time every day or week to personally watch their favorite shows.
AVERAGE MINUTE AUDIENCE/ RATING:	Broadcast	The average number of persons in, or percent of a demographic, tuning to a station during an average minute.
BILLBOARD:	Broadcast	Sponsoring announcement/identification at the beginning, end or in a break of a radio or television program.
BINGE VIEWING:	Broadcast	The practice of watching television for longer time spans than usual, usually of a single television show.
BOOKEND:	Broadcast	Spots airing at the beginning and end of a commercial cluster.
BREAKFAST/DAY/DRIVE/ EVENING:	Broadcast	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 1 a.m., respectively.
CLOSED CAPTIONING:	Broadcast	The compulsory text version of TV programs and commercials for the hearing impaired.
CLUSTER:	Broadcast	The set of different commercials within a commercial break, usually two to three minutes in total.
COMPARAGRAPH:	Broadcast	A snapshot of all broadcasters prime time schedules day by day, hour by hour.
CRAWL:	Broadcast	An ad unit that literally crawls across the bottom of the viewing screen.
CUMULATIVE AUDIENCE (CUME)/PERCENT CUME:	Broadcast	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 percent.

TERM	MEDIA	DEFINITION
CUT-IN:	Broadcast	Regional or station insertion of an alternative commercial replacing a spot carried nationally or provincially on a network.
DYNAMIC INSERTION:	Broadcast	Programmatic ad insertions for VOD. Pre-Post and mid roll.
GRID CARD:	Broadcast	Rate card that reflects audience delivery and demand at different times, resulting in a variety of rates for that program.
HOMES USING TELEVISION (HUT):	Broadcast	Percent of households with one or more sets tuned to any station at a given time.
HOURS TUNED:	Broadcast	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.
INFOMERCIAL:	Broadcast	Long-form DRTV, usually 30 minutes, but can be 60 minutes with broadcaster permission. Asks viewers to respond, usually by placing an order for product, service or information.
INTERNET PROTOCOL TELEVISION (IPTV):	Broadcast	IPTV is a system through which television services are delivered using the Internet protocol suite over a packet-switched network such as a LAN or the Internet, instead of being delivered through traditional terrestrial, satellite signal, and cable television formats. Unlike downloaded media, IPTV offers the ability to stream the media in smaller batches, directly from the source.
LEAD-IN/LEAD-OUT:	Broadcast	Programming leading into or out of a time block.
LINEAR TELEVISION:	Broadcast	Television service where the viewer has to watch a scheduled TV program at the particular time it's offered, and on the particular channel it's presented on.

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TERM	MEDIA	DEFINITION
LOWER THIRDS (SNIPES):	Broadcast	An ad unit that is displayed in the lower third of the screen and may be static or animated. Usually 7 – 10 seconds in length.
PERSONAL VIDEO RECORDER (PVR), DIGITAL VIDEO RECORDER (DVR):	Broadcast	A set-top box that stores video information in digital form.
PICK AND PAY:	Broadcast	Choose the channels you want and only pay for those.
PRE/POST RELEASE:	Broadcast	A pre-released program airs before the U.S. episode and post-release airs after.
PRIMEFRINGE/DAY:	Broadcast	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 STACKING:	Broadcast	Ordering of entire seasons of a program – Used to influence binge watching. (Netflix).
PROGRAMMATIC PURCHASING:	Broadcast	Automated auction based buying system.
QUARTER-HOUR AUDIENCE:	Broadcast	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.
REMOTE:	Broadcast	On location broadcast.
RUN OF SCHEDULE (ROS):	Broadcast	Scheduling of a commercial in variable time blocks, days or programs.
SHARE OF AUDIENCE:	Broadcast	The percentage of all households watching a particular program. The household, rather than each person, is counted as a whole.
SIMULTANEOUS PROGRAM SUBSTITUTION:	Broadcast	Where the U.S. and Canadian stations are telecasting the same episode of a program at the same time, though Canadian audiences receive Canadian advertisements.

TERM	MEDIA	DEFINITION
SPILL-IN:	Broadcast	Broadcast signal from one market received in another.
SPLIT COMMERCIAL:	Broadcast	A commercial from the same advertiser devoting part of its time to one product, part to another, each being able to stand alone.
SPOT TV:	Broadcast	Purchase of broadcast time on a station-by-station basis, i.e., non-network time. Also referred to as Selective.
SQUEEZE-BACKS:	Broadcast	When an ad shares the television screen with a program's credits. Hence the credits are "squeezed."
STANDARD BROADCAST CALENDAR:	Broadcast	Division of a year into specified weeks commencing Mondays, for costing/billing/scheduling purposes.
STRIP PROGRAMMING:	Broadcast	A program scheduled at the same time (usually during fringe or daytime) on successive days (usually Monday-Friday).
SUPERSTATION:	Broadcast	Station whose signal is available to cable systems across the country via satellite transmission.
TALENT CYCLE:	Broadcast	A 13-week time period on which residual payments to an advertisement's performers are based.
VIDEO ON DEMAND (VOD):	Broadcast	VOD are systems which allow users to select and watch video content when they choose to, rather than having to watch at a specific broadcast time. Set Top Box (STB) VOD, typically provided by Digital Cable providers, allows a subscriber to order video content on a free or pay-per-view basis via an interactive menu, and view it on demand. IPTV technology is often used to bring video on demand to connected televisions and personal computers.

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TERM	MEDIA	DEFINITION
DIGITAL		
AD IMPRESSION:	Digital	Ad that is served to a user's browser. Ads can be requested by the user's browser (referred to as pulled ads) or they can be pushed, such as e-mailed ads.
AD NETWORKS:	Digital	An online advertising network or ad network is a company that connects advertisers to web sites that want to host advertisements. The key function of an ad network is aggregation of ad space supply from publishers and matching it with advertiser demand.
AD REQUEST:	Digital	Request for an advertisement as a direct result of a user's action, as recorded by the ad server.
AD SERVING AND SERVERS:	Digital	Ad serving describes the technology and service that places advertisements on web sites. Ad serving technology companies provide software to web sites and advertisers to serve ads, count them, choose the ads that will make the website or advertiser most money, and monitor progress of different advertising campaigns. Ad servers are divided into two types: Publisher ad servers and advertiser (or third party) ad servers.
AD VERIFICATION:	Digital	A system that ensures every ad impression is a quality impression, every impression is compliant, and every ad was served and displayed exactly as intended.
AGENCY TRADING DESKS	Digital	An agency trading desk is a department or subsidiary of an advertising or media agency. It is often considered as an "internal" center of excellence for managing digital advertising buying on behalf of agency clients.

TERM	MEDIA	DEFINITION
ALGORITHM:	Digital	An algorithm is a set of formulas developed for a computer to perform a certain function. This is important in the social sphere as the algorithms sites like Facebook and Google use are critical for developing content-sharing strategies.
ANALYTICS:	Digital	The systematic computational analysis of data or statistics. Website analytics refers to the software that collects the data and provides analysis tools.
APP:	Digital	A software application downloaded onto mobile devices; designed to educate, entertain or assist consumers.
APPLICATION PROGRAMMING INTERFACE (API):	Digital	An API is a documented interface that allows one software application to interact with another application.
BANDWIDTH:	Digital	The transmission rate of a communications line or system.
BEHAVIORAL TARGETING:	Digital	Displaying ads to users based on their past browsing behaviour within an ad network or through a DSP. (Demand Side Platform)
BID:	Digital	Maximum amount of money that an advertiser is willing to pay each time a web searcher clicks on an ad or views an ad.
CACHE:	Digital	Memory used to temporarily store the most frequently requested online content/files/pages to speed its delivery to the user.
CLICK-THROUGH RATE (CTR):	Digital	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 NETWORK:	Digital	Group of websites that agree to show ads on their sites, collectively served by a third-party ad network, in exchange for a share of the revenue generated by those ads.

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TERM	MEDIA	DEFINITION
CONTEXTUAL ADVERTISING:	Digital	Advertising targeted to a non-search web page based on the page's content, keywords or category.
COOKIE:	Digital	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.
COST-PER-CLICK (CPC):	Digital	Cost of advertising based on the number of clicks received.
CROWD FUNDING:	Digital	Crowd funding refers to the act of soliciting donations or investments from online users outside your organization who collectively raise money to support a cause or to underwrite a project.
CROWD SOURCING:	Digital	Crowdsourcing refers to the act of soliciting content, ideas or skills from online users outside your organization who collectively help you solve a problem.
DATA MANAGEMENT PLATFORM (DMP):	Digital	A centralized system for gathering first-party data, integrating with third-party data, and applying this data to one's advertising strategy. Advanced DMPs offer users the ability to create custom segments, forecast segment volumes, sync segments with other sources, overlay advanced analytics, and are often integrated with or part of DSP platforms.
DSP (DEMAND SIDE PLATFORM):	Digital	A demand side platform (DSP), also called buy side optimizer and buy side platform is a technology platform that provides centralized and aggregated media buying from multiple sources including ad exchanges, ad networks and sell side platforms, often leveraging real time bidding capabilities of these sources.

TERM	MEDIA	DEFINITION
DYNAMIC AD INSERTION:	Digital	Process by which an online ad is inserted into a web page in response to a user's request. Allows for multiple ads to be rotated through one or more spaces or placed based on demographic data or usage history for the current user.
DYNAMIC CPM (DCPM):	Digital	The approach to winning ad traffic by increasing CPM bid by the necessary minimum in real time to outbid competition.
DYNAMIC PRICING:	Digital	The purchase price for an ad impression that is determined via a realtime auction rather than a predetermined fixed rate.
FIRST LOOK:	Digital	"First look" is a tactic widely offered by sellers who offer prioritized access to select Advertisers within an open market environment. Instead of the winning impression going to the highest bid, "first look" affords first right of refusal for an impression within an exchange based on a pre-negotiated floor or fixed price. If the buyer bids, they are guaranteed to win the impression. This privilege is typically granted in return for a commitment.
HASHTAG:	Digital	A hashtag is a tag used on the social network Twitter as a way to annotate a message. A hashtag is a word or phrase preceded by a "#." Example: #yourhashtag. Hashtags are commonly used to show that a tweet, a Twitter message, is related to an event or conference, online or offline.
HYPERLINK:	Digital	Programming that redirects the user to a new URL when the individual clicks on hypertext.
INDEPENDENT TRADING DESK (ITD):	Digital	A third party company that licenses and supports DSP technology to act as a trading desk for Advertisers/Agencies.

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TERM	MEDIA	DEFINITION
LANDING PAGE:	Digital	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.
LINK BUILDING:	Digital	Link building is an aspect of search engine optimization in which website owners develop strategies to generate links to their site from other websites with the hopes of improving their search engine ranking. Blogging has emerged as a popular method of link building.
LONG TAIL PUBLISHERS:	Digital	Small, sub-scale ad Publishers such as blogs to niche commercial sites.
LOOK-ALIKES/AUDIENCE MODELLING:	Digital	Potential customers modeled after an Advertiser's 1st party data (usually data from their customers who visit and make purchases from their websites). Attributes of the Advertiser's customers are matched against a larger audience, creating a pool of highly targetable and 'prequalified' users. Some companies refer to this also as 'pre-targeting'.
M-COMMERCE:	Digital	Mobile commerce, the ability to conduct monetary transactions via a mobile device, such as a WAP-enabled cell phone.
MEME:	Digital	A meme on the internet is used to describe a thought, idea, joke, or concept to be shared online. It is typically an image with text above and below it, but can also come in video and link form.
METADATA:	Digital	Data that provides information about other data. This includes descriptions of the characteristics of information, such as quality, origin, context, content and structure.

TERM	MEDIA	DEFINITION
MICROSITES:	Digital	Multi-page ads accessed via click-through from initial ad. User stays on the publisher's website, but has access to more information from the advertiser than a standard ad format allows.
OPT-IN / OPT-OUT:	Digital	Refers to an individual giving a company permission to use data collected from or about the individual for a particular reason, such as to market the company's products and services. Also known as permission marketing. The opposite is to 'Opt-Out' or deny an advertiser the ability to collect information or send updates.
ORGANIC SEARCH RESULTS:	Digital	Unpaid search engine listings, as distinct from paid search engine placements or pay-per-click ads.
PIXEL:	Digital	Element (single illuminated dot) on a computer monitor. The metric used to indicate the size of internet ads.
PLATFORM:	Digital	A platform is the framework or content management system that runs software and presents content.
PODCAST:	Digital	A podcast, or non-streamed webcast, is a series of digital media files, either audio or video, that are released episodically and often downloaded through an RSS feed.
POST-CLICK:	Digital	Actions performed by a user on an advertiser site after being redirected there from clicking an ad.

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TERM	MEDIA	DEFINITION
PRIVATE EXCHANGE:	Digital	A virtual marketplace operated by sellers to represent their high value/ premium inventory, providing programmatic access to select buyers (via a DSP) who agree to transact based on pre-negotiated terms (e.g. flight dates, floor prices, auction types, budgets, etc.). True private exchanges offer access to inventory that is not otherwise available within the open market.
PROGRAMMATIC:	Digital	In digital marketing, programmatic marketing campaigns are automatically triggered by any type of event and deployed according to a set of rules applied by software and algorithms. Human skills are still needed in programmatic campaigns as the campaigns and rules are planned beforehand and established by marketers.
QR CODE:	Digital	A two-dimensional barcode that, when scanned by a smartphone, delivers information, links or coupons to the user.
QUALITY SCORE:	Digital	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:	Digital	A request for information, usually to a search engine.
REAL-TIME BIDDING:	Digital	A data-driven programmatic buying model allowing Advertisers or their Agencies to bid on digital media (display, video, mobile, social, etc.) in real-time, at the impression level.

TERM	MEDIA	DEFINITION
RE-DIRECT:	Digital	One server assigning an ad-serving or ad-targeting function to another server, often operated by a third company.
REFERRING URL:	Digital	The address of the webpage that a user previously visited prior to following a link.
RETARGETING:	Digital	Re-messaging various messages to a collective pool of participants based on the pools the buyer/client creates; usually involves collecting data by pixelating the Advertiser's website.
RTB:	Digital	The RTB acronym indicates a real-time system for either bidding on or buying ad inventory. The initial RTB ecosystems evolved from the efforts of DSPs to create a more efficient exchange of inventory. Due to these roots, RTB ecosystems put significant emphasis on user information (demographic and behavioral data, for example), while discounting the situation information (the publisher and context).
RTB - BIDDER:	Digital	Connects to one or more "pipes" and evaluates every impression that's announced. The real-time bidder is responsible for making the best inventory acquisition decisions possible, on behalf of the Advertiser.
RTB PIPE (API):	Digital	Provides a server-side connection into an inventory source and pushes impressions, in real time, to eligible buyers. It announces impressions as they are made available to buy.
RUN-OF-NETWORK (RON):	Digital	Scheduling of internet advertising whereby an ad network positions ads across the sites it represents at its own discretion, according to available inventory.

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TERM	MEDIA	DEFINITION
RUN-OF-SITE (ROS):	Digital	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.
SEARCH RETARGETING:	Digital	A method that enables advertisers to show an ad specifically to visitors based one or more searches or search click events.
SECOND PRICE AUCTION:	Digital	The winner of the bid pays the price of the 2nd highest bidder + 1 cent (also known as a Vickrey auction).
SEM (SEARCH ENGINE MARKETING):	Digital	A form of Internet Marketing that seeks to promote websites by increasing their visibility in the Search Engine result pages.
SEO (SEARCH ENGINE OPTIMIZATION):	Digital	SEO is the process of improving the volume and quality of traffic to a web site from search engines via "natural" ("organic" or "algorithmic") search results.
SESSION COOKIES:	Digital	Cookies that are loaded into a computer's RAM, and only work during that browser session.
SESSION:	Digital	Also called a visit. A single, continuous set of activity attributable to a cookie'd browser or user resulting in one or more pulled text and/or graphics downloads from a site.
SMS (SHORT MESSAGING SERVICE):	Digital	A wireless messaging service that permits the transmission of a short text message from and/or to a digital mobile telephone terminal.

TERM	MEDIA	DEFINITION
SSP (SELL SIDE PLATFORM):	Digital	A sell side platform (SSP), also called sell side optimizer, inventory aggregator, and yield optimizer is a technology platform that provides outsourced media selling and ad network management services for publishers. A sell side platform business model resembles that of an ad network in that it aggregates ad impression inventory. However, a sell side platform serves publishers exclusively, and does not provide services for advertisers. The inventory managed by the SSP is usually purchased by aggregate buyers, either demand side platforms (DSPs) or ad networks.
SUPPLY SIDE PLATFORM/SELL SIDE PLATFORM (SSP):	Digital	An entity which facilitates the sale of a publisher's inventory through and ad exchange. SSPs offer services such as minimum bid requirements, etc.
TAGGING:	Digital	The process of placing a pixel/ Beacon on an Advertiser's website or search landing pages to "tag" users as having visited those pages so that they can be eligible for subsequent targeting/messaging.
TAGS, BEACONS:	Digital	1x1 pixel tags on many websites that can track web surfers' location and activities online, such as a registration or conversion. Some are powerful enough to know what a user types on a particular site.
THIRD-PARTY AD SERVER:	Digital	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.
TRADING DESK:	Digital	Online ad traders plugged into a DSP or ad exchange.

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TERM	MEDIA	DEFINITION
UGC (USER-GENERATED CONTENT)	Digital	UGC stands for user-generated content, an industry term that refers to all forms of user-created materials such as blog posts, reviews, podcasts, videos, comments and more
UNIQUE COOKIE:	Digital	A count of unique identifiers that represents unduplicated instances of internet activity (generally visits) to internet content or advertising during a measurement period.
VAST	Digital	The digital video ad serving template (VAST) provides a standardized method for communicating the status of a video ad back to the ad servers in the case where the ad is served from a dynamically selected ad server. It is specifically designed for on-demand video player where the ad response is parsed prior to play. VAST is applicable to Linear Video Ads (such as "pre-rolls"), Non-linear Video Ads (such as "overlays") and Companion ads as defined in the IAB Digital Video Ad Format Guidelines.
WHITELIST	Digital	A list of web sites that an Advertiser will permit their ads to be placed on. Websites not on this list will not be used to display ads for the Advertiser.
WIDGET:	Digital	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 or personal web pages.
XML (EXTENSIBLE MARKUP LANGUAGE)	Digital	A richer more dynamic successor to HTML utilizing SGML or HTML type tags to structure information. XML is used for transferring data and creating applications on the Web. See SGML and HTML.

TERM	MEDIA	DEFINITION
DIGITAL ADS		
BUTTON:	Digital Ads	Clickable graphic, potentially an ad that contains certain functionality, such as taking one to another site or executing a program.
EXPANDABLE BANNERS:	Digital Ads	Banner ads that can expand beyond the confines of the traditional banner, to reveal more advertising information triggered by a click, roll-over or auto-initiation.
GIF, JPG, HTML5, SWF:	Digital Ads	All standard web graphic formats which uses compression to store and display images.
IN-BANNER VIDEO ADS:	Digital Ads	Leverage the banner space to deliver a video experience as opposed to another static or rich media format. The format relies on the existence of display ad inventory on the page for its delivery:
INTERSTITIAL ADS:	Digital Ads	Ads that appear between two content pages. Also known as transition ads, splash pages and Flash pages.
IN-TEXT VIDEO OR IMAGE ADS:	Digital Ads	Delivered from highlighted words and phrases within the text of web content. The ads are user activated and delivered only when a user chooses to move their mouse over a relevant word or phrase.
LEADERBOARD, BIG BOX, SKYSCRAPER:	Digital Ads	The three standard creative ad units – Leaderboard is a horizontal format: 728 x 90 pixels, Skyscraper is a vertical format: 160x600 pixels , and Big Box 300x250 pixels.
OVERLAY / FLOATING ADS:	Digital Ads	An overlay is a media element that 'floats' above other content. This could be text floating over video, or an expanding banner ad expanding over page content.
POP-UNDER AD:	Digital Ads	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.

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TERM	MEDIA	DEFINITION
POP-UP AD:	Digital Ads	Online ad that appears in a separate window on top of content already on-screen.
POST-ROLL:	Digital Ads	Form of online video ad placement where the ad is played after the content video plays.
PRE-ROLL OR IN-STREAM VIDEO ADS	Digital Ads	Form of online video ad placement where the ad is played before the content video plays.
PUSHDOWN:	Digital Ads	An ad unit that literally “pushes” down the content to reveal a rich-media advertisement.
RICH MEDIA:	Digital Ads	Online advertisements with which users can interact (as opposed to solely animation) in a web page format.
GENERAL		
ACHIEVEMENT:	General	Actualized delivery of audience, ratings, etc. of a media campaign, usually compared to planned/estimated objectives.
ACQUISITION COST:	General	The cost of signing up a new customer.
ADVERTORIAL:	General	A type of advertising that is placed in a print publication. The ad is designed to appear like an editorial article.
AFFIDAVIT:	General	Written legal proof-of-performance from a radio or television station that a schedule of commercials ran at the time indicated.
AIDED AWARENESS:	General	Percent of an audience aware of a brand or advertising message once prompted with visual or aural cues.
AUDIENCE COMPOSITION:	General	Analysis of audience in terms of selected sub-groups based on demographics, lifestyle, etc., usually expressed as percentages.
AVAILABILITIES (OR AVAILS):	General	Programs or time periods a station offers for sale.

TERM	MEDIA	DEFINITION
BLOCKING CHART:	General	The graphic presentation on a calendar of planned advertising activity.
BRAND DEVELOPMENT INDEX (BDI):	General	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 percent of the total population in a specific market/region.
BUDGET CONTROL REPORT (BCR):	General	Monthly, quarterly or annual document detailing actual versus projected expenditures to date.
CALL TO ACTION:	General	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.
CENTRAL MARKET AREA (CMA):	General	Geographical area, defined by BBM, usually centered around one urban centre.
CHURN:	General	Turnover in subscribers. Primarily refers to pay TV.
CLOSING DATE:	General	The final deadline by which a publication will accept advertising space reservations/material.
CONTENT INTEGRATION:	General	Advertising woven into editorial content or placed in a contextual envelope.
CONTROLLED CIRCULATION:	General	Publications distributed free, or mainly free, to individuals within a specific demographic segment, geographic area or job function.
CONVERGENCE:	General	A multi-platform campaign employing many or all properties owned by one major media owner.
CONVERSION RATE:	General	The percentage of responders who become customers.
COST PER INQUIRY (CPI):	General	A simple arithmetical formula derived by dividing the total cost of a mailing or an advertisement by the number of inquiries received.

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TERM	MEDIA	DEFINITION
COST PER ORDER (CPO):	General	As with CPI., except based on actual orders rather than inquiries.
COST PER RATING (CPR):	General	The cost of delivering a message to 1% of a pre-determined target group.
COST PER THOUSAND (CPM):	General	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.
COST-PER-ACTION (CPA):	General	Performance-based advertising model where payment is dependent upon an action that a user performs as a result of the ad.
COST-PER-LEAD (CPL):	General	Performance-based advertising model where the cost of advertising is determined based on the number of database files (leads) received.
COVERAGE:	General	Percentage of homes or individuals in a specific area that receive a broadcast and/or cable signal, are reached by a publication or other media.
CROSSTAB (X-TAB):	General	Cross-referencing of data to identify habits/ characteristics of a defined subset of the population.
CUMULATIVE REACH:	General	Percentage of the target reached by a schedule in a given time period.
DECAY:	General	The decline in top-of-mind awareness as the result of a hiatus period, commercial wearout or competitive action.
DE-DUPE:	General	Identifying and consolidating duplicate names; usually done in a merge/purge operation.
DESIGNATED MARKET AREA (DMA):	General	Geographical area comprised of a market and adjacent counties or census divisions, as defined by Nielsen Media Research.

TERM	MEDIA	DEFINITION
DUPLICATION:	General	The extent to which two media vehicles have a common audience.
EARNED RATE:	General	Discounted advertising rate based on lineage/space committed.
EFFECTIVE FREQUENCY:	General	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:	General	Percentage of target reached at the stated "effective frequency" level.
EFFICIENCY:	General	Cost-effectiveness of a media buy based on CPMs/CPRs.
EXTENDED MARKET AREA (EMA):	General	Geographical area comprised of a market and adjacent counties or census divisions, as defined by BBM.
FLIGHTING:	General	Periodic waves of advertising, separated by periods of total inactivity (as opposed to continuous advertising).
FORWARD SORTATION AREA (FSA):	General	The alphanumeric, three-digit prefix of Canadian postal codes. Used widely in list selection due to its precision and demographic indicators.
FREQUENCY CAPPING:	General	The ability to set a limit on the number of times an advertiser exposes a user to their advertising within a fixed time period
FREQUENCY DISTRIBUTION:	General	Average frequency, broken down to indicate the percentage of the audience that has been exposed to the message once, twice, etc.
FREQUENCY:	General	The average number of times an advertising message has been exposed to a target audience.
GEO-TARGETING:	General	Geo-targeting allows advertisers to specify where ads will or will not be shown based on user location.

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TERM	MEDIA	DEFINITION
GROSS RATING POINTS (GRPS):	General	The sum of all ratings delivered by a given schedule, against a pre-determined target group. GRPs = reach x frequency.
HYBRID PRICING:	General	Pricing model based on a combination of a CPM pricing model and a performance-based pricing model.
IMPRESSIONS/MESSAGES:	General	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.
INCUMBENCY POSITION:	General	Premium positions in a specific issue for which right of first refusal is given to an advertiser who has historically held that position.
MAKE-GOOD:	General	Commercial announcement offered to an advertiser as compensation for a pre-empted spot or one that ran incorrectly.
MARKET DEVELOPMENT INDEX (MDI):	General	A market's propensity to use a product category; calculated by dividing the percent of a product category's total sales by the percent of the total population in a specific market/region.
MECHANICAL REQUIREMENTS:	General	Information and instructions regarding the physical aspects of preparing advertising material.
MODELING:	General	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.

TERM	MEDIA	DEFINITION
NET (UNDUPLICATED) AUDIENCE:	General	Number of households or people reached by a particular broadcast schedule or program one or more times.
NON-REMNANT INVENTORY:	General	Inventory sold directly by a Publisher to an advertiser. Remnant inventory is usually sold by a third party.
OPTIMIZATION:	General	A process of adding media elements in order to achieve maximum results at each step.
OTS (OPPORTUNITY TO SEE):	General	Calculation of potential advertising exposure ignoring the possibility that said advertising may not be noticed by the intended audience.
POST-BUY ANALYSIS:	General	An analysis of actual media deliveries calculated after a specific spot or schedule of advertising has run.
PRE-BUY ANALYSIS:	General	A report of estimated deliveries of a broadcast media spot or schedule purchased.
PRIVACY POLICY:	General	A statement about what information is being collected; how the information being collected is being used; how an individual can access his/her own data collected; how the individual can opt-out; and what security measures are being taken by the parties collecting the data.
PULSING:	General	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:	General	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.).

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TERM	MEDIA	DEFINITION
RATING:	General	The average percentage of target group population within a defined geographic area tuned to a particular program at a specific time period.
REACH:	General	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:	General	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.
REMNANT INVENTORY	General	Inventory that a publisher is unable to sell directly which is turned over to a third-party and sold at a discounted rate.
ROI (RETURN ON INVESTMENT)	General	Revenue divided by investment or Media Cost.
ROTATION:	General	Scheduling of a pool of commercials through a set schedule, on a rotating basis.
SHARE-OF-MARKET (SOM):	General	A company's total sales volume expressed as a percentage of total category sales.
SHARE-OF-VOICE (SOV):	General	A company's total advertising spend expressed as a percentage of total spending by the category.
SHORT RATE:	General	Charge incurred when an advertiser fails to meet the previously contracted volume of media time or space.
SPONSORSHIP:	General	Positioning an advertiser as a co-presenter of a specific program, publication or event.
UNAIDED AWARENESS:	General	Percentage of target group aware of brand/ advertising without prompting.

TERM	MEDIA	DEFINITION
OUT OF HOME (OOH)		
BACKLIT POSTER:	OOH	A luminous sign containing advertising graphics printed on translucent polyvinyl material.
BATHROOM ADVERTISING:	OOH	Advertisement on miniboard posted inside a washroom stall.
CAMPUS:	OOH	Advertising used to reach students on campus in high traffic areas.
CINEMA:	OOH	Advertising onscreen or in theatre to reach movie goers.
COLUMNS:	OOH	On Street advertising, can be posters in Columns or the entire column can be wrapped.
DIGITAL COLUMNS:	OOH	Currently only available in Montreal, Each column is equipped with a 72-inch HD LCD screen and a geographical map of downtown on the opposite face.
DIGITAL SUPERBOARDS:	OOH	A form of electronic display airing full-motion video, with or without audio. Displaying advertisements and may contain entertainment and informational content, a digital signage can be updated more easily, even interactively.
ELEVATOR ADVERTISING:	OOH	Advertising posters/billboards sold in elevators.
EXTENSION:	OOH	Advertisement not conforming to a standard shape.
EXTERIOR KING POSTERS:	OOH	Poster located on the exterior sides of a transit vehicle.
FACE:	OOH	An individual, OOH advertising unit.
FLAGGING:	OOH	Peeling, ripping and other damage to OOH paper posters.

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TERM	MEDIA	DEFINITION
HORIZONTAL/VERTICAL POSTER:	OOH	Posters are the common form of billboard advertising, located mostly along primary and secondary arterial roads. Posters are viewed principally by residents and commuter traffic, with some pedestrian exposure. (Horizontal typically 10'x12', vertical typically 16'x12').
MALL ADVERTISING:	OOH	Advertising opportunities in shopping centers. Can be targeted to specific areas or retailers to reach a more targeted foot traffic.
MEGA COLUMNS:	OOH	The spectacular MegaColumns are exclusive to the very select downtown Montreal market. They are the largest street columns available in Outdoor advertising.
MINIBOARD:	OOH	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.
MURAL:	OOH	Large-format vinyl ad unit affixed to the side of a building or a horizontal, graphic advertising image displayed on a web page or advertisement that runs horizontally on the bottom of a page of a publication.
OFFICE BUILDINGS:	OOH	Advertising posters/billboards in and around office buildings.
PERMANENT/ SPECTACULAR:	OOH	An Out-of-Home advertising structure usually larger than 14' H x 48' W, positioned at prime locations in a market, for the exclusive use of one advertiser for a long term.
PROJECTIONS:	OOH	Advertising projected on surfaces such as walls.
SEVENTIES:	OOH	Poster located on the rear exterior of a transit vehicle.

TERM	MEDIA	DEFINITION
SHOWING:	OOH	The full, contracted advertising campaign for a specific advertiser, in a specific geographic area for a specific time period.
SNIPE:	OOH	Refers to a small piece of advertising copy added to an already posted display to modify or append the original message
SPECTACULAR:	OOH	A very large billboard ranging in sizes from 10 x 24 feet to 10 x 60 feet.
STATION DOMINATION:	OOH	A single advertiser blankets all the traditional media within a station.
SUPERBOARD:	OOH	A billboard that has extensions added onto it that extend further than the traditional size.
TRANSIT SHELTER (TSA):	OOH	Displays with copy area 67" H x 46" W, located at bus stops in residential or urban areas.
TRI-VISION:	OOH	A mechanical advertising display with three or more separate faces that can be programmed to move in several ways at different time intervals.
WILD POSTING:	OOH	Posters installed in non-permanent locations such as construction areas or abandoned buildings
WRAP:	OOH	Ad painted on the entire exterior surface of a vehicle.
PRINT		
AGATE LINE:	Print	A unit of space measurement, equal to one column wide and 1/14 inch deep.
BELLY BAND:	Print	Ads wrapped around the paper. Consumers must remove the wrap before they can read the paper.
BLEED:	Print	Printing to the edge of a page so there is no margin.

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TERM	MEDIA	DEFINITION
CENTRE SPREAD:	Print	In the centre of a publication, an advertisement appearing on two facing pages printed as a single sheet.
CIRCULATION:	Print	Average number of copies per issue sold or distributed.
DOOR TO DOOR	Print	Door-to-door distribution of printed materials
EARLUG:	Print	Space on either side of the masthead, or the top corners of the front page of a newspaper section, that is sold for advertising.
EMC	Print	Extended Market Coverage (EMC) is the distribution complement to Subscribers: as the carrier delivers newspapers to each subscriber household, they are able to distribute EMC packages to the homes of non-subscribers on the same streets.
FP4C:	Print	A full-page, four-colour advertisement in a publication.
FREE-STANDING INSERT (FSI):	Print	A loose advertisement that is inserted into a newspaper.
GATEFOLD ADVERTISEMENT	Print	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:	Print	Advertisements are created that have a specific message for a particular region, while the rest of the country receives one generic message.
GUTTER (TRUCK):	Print	Blank space on the inside page margins where a publication is bound or folded.
IBC (INSIDE BACK COVER):	Print	Position of an ad on the inside back cover of a publication.
IFC (INSIDE FRONT COVER):	Print	Position of an ad on the inside front cover of a publication.
ISLAND POSITION:	Print	An ad in the centre of the page, surrounded by editorial.

TERM	MEDIA	DEFINITION
JUNIOR PAGE:	Print	Usually a 7-inch wide x 10-inch high ad in a tabloid or broadsheet format.
MODULAR:	Print	In a modular system ad sizes are represented by the amount of the total page the ad takes up. For example 1/2 page, 1/4 page, 1/8 page, etc. This has been a popular system among some newspapers because it simplifies the layout process (i.e. less ad sizes to fit in newspaper) and makes pricing much easier for an advertiser to understand.
OBC (OUTSIDE BACK COVER):	Print	Position of an ad on the outside back cover of a publication.
OFF-REGISTER:	Print	Blurred printing caused by out-of-position printing plates.
OTC (OPPOSITE TABLE OF CONTENTS):	Print	Position of an advertisement on the page opposite the table of contents of a publication.
POSITION CHARGE:	Print	The surcharge to ensure placement of an ad in a specific position in the publication.
POST IT:	Print	A "Sticker" advertisement on the cover of the Newspaper or Magazine.
RIGHT-HAND PAGE (RHP):	Print	Position of an advertisement on a right-hand page of a publication.
ROP COLOUR	Print	Process colour that is printed in a newspaper during the regular press run for that edition.
RUN OF PAPER OR RUN OF PRESS (ROP):	Print	Ads placed anywhere within the regular printed pages of a newspaper.
TABLOID PRINT:	Print	Format of approximately 13 x 10 inches.
TACO WRAP:	Print	A print advertising opportunity to wrap the newspaper with the Advertiser message.
TEARSHEET:	Print	Page of a publication supplied to agency/advertiser for checking purposes.
WRAP ADVERTISING:	OOH	A single advertiser's message printed on the front cover, IFC, OBC and back cover of a publication.