

2013 COMMUNITY NEWSPAPER REVENUE

A BILLION DOLLAR INDUSTRY

Total 2013 advertising revenue for community newspapers in Canada is **\$1.027 billion**.

Revenue Survey Highlights

- Print advertising revenue represents the majority (97%) of revenue at **\$995.9 million**. The majority (**60%**) of community newspaper revenue comes from Local/Retail advertising.
- Online advertising in 2013 totals **\$31,309,000** and represents **3%** of all revenues, up from 2.7% in 2010. By mid 2013 **91%** of all community newspapers reported having websites up and running, although not all were able to accept or sell advertising.
- Circulation of community newspapers remained stable from 2012 to 2013 with more than **19.6 million** copies distributed every week. Controlled circulation (free distribution) newspapers account for 95% of community newspaper distribution across the country.

(\$000)	2010	2011	2012	2013
National Advertising	291,771	131,066	123,337	107,409
Local/Retail Advertising	741,411	705,236	798,738	601,455
Classified Advertising	109,739	112,523	105,671	82,604
Inserts/Flyers		218,549	225,885	204,389
Total PRINT Advertising Revenue	1,142,921	1,167,374	1,253,632	995,857
Online Advertising	32,241	43,703	35,201	31,309
Total Advertising Revenue	1,175,162	1,211,077	1,288,832	1,027,166

Industry Highlights

- 2 new community newspapers launched.
- 89 community newspapers changed ownership.
- 3 community newspapers merged and 9 newspapers ceased publishing.
- 3 newspapers changed publishing frequency.
- 160+ newspapers revamped their digital websites, digitized their archives, introduced Augmented Reality (AR) technology, or partnered with online publications/commerce sites.



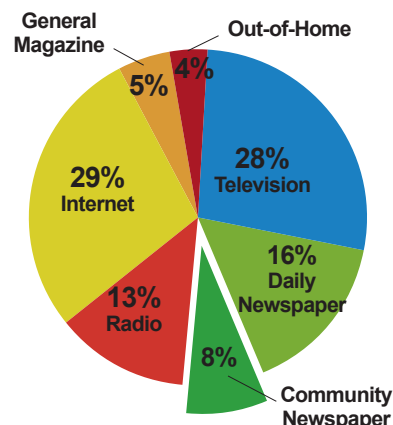
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Net Advertising Volume in Canada

Community newspapers accounted for over a billion dollars in revenue in 2013 and rank 5th behind Internet, Television, Daily Newspapers and Radio.

Community newspaper revenue accounts for more than **8%** of all 2013 advertising revenues in Canada.

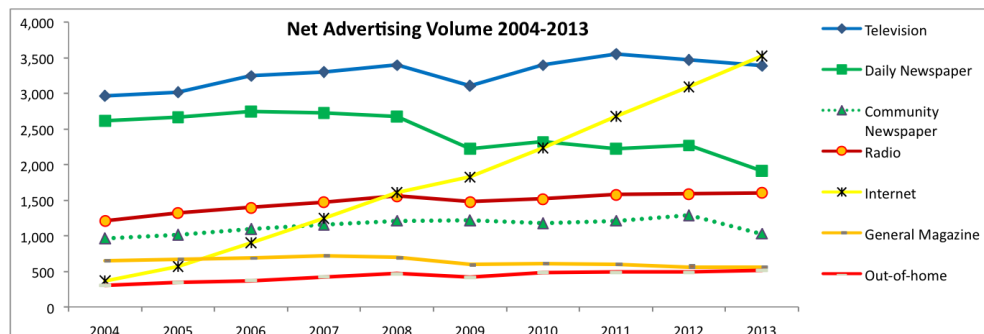


Net Advertising Volume 2004-2013

(\$ millions CAD)

Medium	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	Share
Television	2,964	3,014	3,241	3,299	3,393	3,104	3,391	3,552	3,467	3,387	27.6%
Daily Newspaper	2,611	2,659	2,745	2,722	2,670	2,216	2,316	2,216	2,261	1,909	15.6%
Community Newspaper	961	1,016	1,094	1,154	1,211	1,213	1,175	1,211	1,288	1,027	8.4%
Radio	1,209	1,316	1,391	1,468	1,558	1,470	1,517	1,576	1,585	1,600	13.1%
Internet	364	562	900	1,241	1,602	1,822	2,232	2,674	3,086	3,525	28.8%
General Magazines	647	665	682	718	692	590	606	593	573	558	4.6%
Out-of-Home	302	344	370	422	463	416	482	484	486	514	4.2%
TOTAL ACTUALS	9,059	9,576	10,313	10,873	11,408	10,618	11,473	12,017	12,470	12,258	

Sources: Television: Linear revenue - CRTC; Online revenue - TVB | Daily & Community Newspaper: Newspapers Canada | Radio: CRTC | Internet: IAB | General Magazine: Magazines Canada | Outdoor: Estimate of net revenue based on NMR data



Revenue Survey Methodology and Technical Notes

Data collection via online questionnaire took place between April and August 2014. Almost 97% of chain revenue was reported, which accounted for more than 80% of total weekly newspaper advertising revenue across Canada. Independent participation was 30% with 141 independent publisher responses.

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