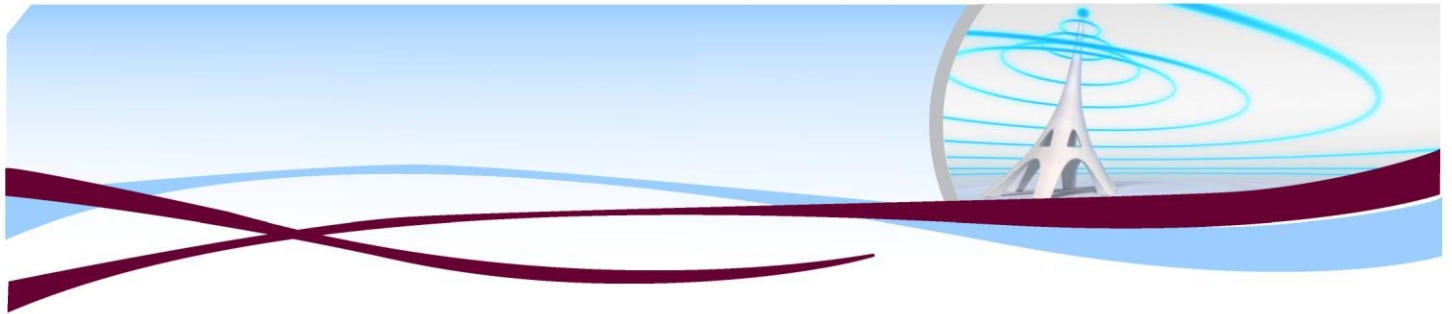




Canadian Radio-television and
Telecommunications Commission

Conseil de la radiodiffusion et des
télécommunications canadiennes



Communications Monitoring Report

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Interested parties are welcome to provide comments for improvements or additions to future editions of the report. You can send your comments to the attention of the Secretary General, CRTC, Ottawa, K1A 0N2.

Executive summary

Approximately 98% of Canadian households are located within a 1.5 Mbps broadband footprint, consisting of either landline or mobile (i.e., HSPA+) facilities. On a provincial basis the footprint encompasses all households in the following 5 provinces: Alberta, Ontario, New Brunswick, Nova Scotia, and Prince Edward Island. For the remaining provinces it encompasses at least 89% of the households. With respect to Canada's mobile network, 97% of Canadians are within the mobile broadband footprint.

Broadband penetration continues to increase. Seventy percent of households subscribe to 1.5 Mbps broadband Internet service in 2010 compared to 62% in 2009 and 52% subscribe to 5 Mbps service compared to 44% in 2009. With respect to mobile broadband, 39% of wireless devices are either handheld or dedicated devices that allow the user to access broadband services. Canada's extensive broadband footprint provides Canadians with the means to actively participate in Canada's digital economy and new media activities.

Communications service revenue growth

Canadian communications service revenues continued its year-over-year increase, going from \$55.4 billion in 2009 to \$57.4 billion in 2010, or by 3.6%. The growth was driven by the 8.9% increase in broadcasting revenues and the 1.8% increase in telecommunications revenues.

Broadcasting

Broadcasting revenues went from \$14.4 billion in 2009 to \$15.7 billion in 2010. The increase was due to revenue growth in all of the broadcasting sectors: 8.9% in BDU revenues, which increased from \$7.4 billion to \$8.1 billion; 11.1% in Pay, PPV, VOD and specialty service revenues, which increased from \$3.1 billion to \$3.5 billion; 9.9% in conventional television, including the CBC, which increased from \$2.4 billion to \$2.6 billion; and 2.9% revenue growth in radio revenues which increased from \$1.5 billion to \$1.6 billion.

Telecommunications

Telecommunications service revenues increased from \$40.9 billion in 2009 to \$41.7 billion in 2010, or by 1.8%. The increase was due to newer, or non-legacy data services, and broadband Internet and wireless service revenues which, collectively, increased from \$25.0 billion in 2009 to \$26.5 billion in 2010 or by 6.2%

Non-legacy data revenues increased from \$1.7 billion to \$1.8 billion, or by 8.2%. Internet service revenues increased from \$6.5 billion to \$6.8 billion, or by 4.2%. Wireless revenues increased from \$16.9 billion to \$18.0 billion, or by 6.6%. These increases were partially offset by the following decreases: -11% in long distance revenues, which went from \$3.9 billion to \$3.4 billion; -5.3% in legacy data and private line revenues, from \$2.6 billion to \$2.5 billion, and -2.7% in local and access revenues, from \$9.4 billion to \$9.1 billion.

The communications industry

In 2010, the five largest companies in the communication industry captured 83% of the industry's revenues. The next five captured 9%. Collectively these companies have 92% of the revenues. Of the 11 markets¹ in the industry, three companies offered services in all of these markets, representing 63% of the industry revenues. These companies are positioned to provide service bundles. In 2010, approximately 48% of residential customers subscribed to service bundles that consisted of local telephone service and one or more of the following services: Internet access, video, and mobile. Approximately 91% of telecommunications revenues were from TSPs operating in all of the telecommunications market sectors and 68% of broadcasting revenues were from companies operating in all of the broadcasting sectors.

Competition

The alternative TSPs' share of total wireline telecommunications revenues remained relatively unchanged at 37% in 2010. The alternative TSPs' market share included the incumbent telephone companies' operations outside of their traditional territories. The incumbent telephone companies' operations outside of their traditional operating territories decreased from 8% in 2009 to 7% in 2010, other facilities-based TSPs such as cable companies and hydro utility companies with telecommunications activities increased from 23% in 2009 to 25% in 2010, and resellers remained relatively unchanged at 6%.

The cable companies were major providers of high-speed Internet service, as they had approximately 57% of high-speed residential Internet subscribers in 2010. In 2005, these companies started to provide local telephone service generally over a managed IP network, and by year-end 2010, had captured approximately 31% of local residential lines to become major competitors of the incumbent telephone companies in residential markets.

The competitors of the incumbent telephone companies, which include incumbent telephone companies operating outside their traditional territories, maintained their share of telecommunications revenues. Competitors, essentially cable BDUs, had strong growth in their number of residential local lines, which increased by 15%. Competitor business lines increased 4%.

New wireless entrants collectively captured approximately 2% of the wireless subscribers and 1% of revenues in 2010. Overall, the new entrants stimulated the market as the number of wireless subscribers increased by 8.5% in 2010 compared to 7.8% in 2009. The average revenues per subscribers decreased 1.6%, from \$58.81 to \$57.86 in 2010 due in large part to the lower prices for service by new entrants.

¹ The markets consist of 5 broadcasting markets (radio, television, BDU speciality, and VOD, pay & PPV) and 6 telecommunications markets (local & access, long distance, Internet, data, private line and wireless)

Broadcasting

Radio

There were 1208 radio and audio services in Canada in 2010. Seventy-five percent of the radio and audio services were broadcast to English-language Canadians, 22% to French-language Canadians, and the remaining 3% to third-language Canadians.

National average weekly hours tuned per capita remained relatively unchanged at 17.6 hours in 2010. On a per-listener basis, average weekly hours tuned also remained relatively unchanged at 19.4 hours per listener.

Television

Overall viewing of Canadian programs on Canadian English-language services was 88% in 2010, while viewing of Canadian programs on French-language services remained relatively unchanged at 99%. While drama and comedy programs continued to be the most popular genre, it is predominantly of non-Canadian content. In 2010, 81% and 67% of English- and French-language drama and comedy programs were non-Canadian, respectively.

BDUs

In 2010, approximately 11.5 million or 91% of Canadian households subscribed to a BDU for television service, an increase of 2.5% over the previous year. Of those subscribing to BDUs, 25% subscribed to either a DTH provider or a MDS BDU. The top four cable BDUs and the two DTH providers captured 89% of all BDU subscribers in 2010.

BDU programming revenues per subscriber per month² increased by \$3.55 or 6%, to \$59.73 in 2010.

New media broadcasting

A growing number of Anglophone and Francophone Canadians are adopting new media broadcasting. The adoption rates of Anglophones for video on demand, Internet video, and video on a cell phone are 15%, 51% and 9%, respectively and 17%, 49% and 4% respectively for Francophones. More Canadians are watching television programming online. Of those viewing online TV, Anglophones spend 2.6 hours per week and Francophones spend 1.5 hours per week in such an activity.

Anglophones that stream online radio, tend to do more streaming than their francophone counterparts. The anglophones spend 6.1 hours per week streaming audio compared to 5.3 hours for Francophones.

² Revenues per subscriber per month were derived by dividing total revenues by the number of subscribers and by the number of months in the year.

Telecommunications

The number of mobile phone subscribers increased 9% in 2010 from the previous year. As well, Canadians continued to embrace technologies including broadband access to the Internet as the number of residential subscribers to high-speed Internet services increased by 5%. In 2010, approximately 70% of Canadian households had broadband Internet service and 74% had high-speed Internet service.

Newer data services that meet business customer requirements for increased speed, functionality, and cost-efficiency now represent 90% of data protocol revenues, with data services such as Ethernet and IP-based private networks having a combined revenue growth of 10% in 2010.

Data collection

The data compiled for this report was obtained from a number of sources. The majority of the data was collected using the Commission's data collection survey forms. Broadcasting data was generally for the twelve-month period ending 31 August 2010 and telecommunications data was for the twelve-month period ending 31 December 2010.

The Commission collaborates with other government agencies and departments such as Statistics Canada and Industry Canada to minimize the reporting burden on the industry. The data collected for monitoring purposes is also used by Statistics Canada for its national system of accounts. Additional survey questions were added to meet Statistics Canada's specific needs.

The Commission continues to work with Industry Canada to identify the availability of broadband Internet access service across all regions of Canada. The data, jointly collected, assists Industry Canada in its administration and monitoring of broadband deployment initiatives.

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1.0 Introduction

Domestic and global competition, as well as consumer demand for communication services, has spurred rapid corporate and technological developments and contributed to the convergence of broadcasting and telecommunications service providers in Canada and abroad. Communications companies are crossing traditional boundaries between broadcasting and telecommunications. The evolving borderless world of communications is a source of innovation and opportunities for carving out a special place for Canadians.

1.1 Purpose of the report

This report provides a window on the broadcasting and telecommunications industries, and is intended to foster an open and better-informed public discussion of broadcasting and telecommunications policies and issues. The Commission invites parties to use this report to enrich their participation in the regulatory process.

The report contains disaggregated data on the Canadian broadcasting and telecommunications industries and their markets, as well as international comparisons. It provides a means to assess the impacts of market and technological developments on, among other things, the cultural, social, economic, and policy objectives of the *Broadcasting Act* and the *Telecommunications Act* (the Acts), and to review the effectiveness of the CRTC's regulatory frameworks and determinations in achieving those objectives.

The report focuses on the performance indicators and trends presented, in last year's report and, where appropriate, introduces additional indicators that address industry developments, such as the availability of higher speed wireline and wireless broadband services. These developments contribute to the evolution of a modern and efficient communications network.

1.2 Data collection and outline of the report

Data collection

This report is based on (1) the responses from the broadcasting and telecommunications industries to the CRTC's annual broadcasting returns and telecommunications data collection forms, issued jointly by Statistics Canada and the CRTC, and are referred to collectively as "CRTC data collection"; (2) data collected from other sources, including Statistics Canada, Industry Canada, company-specific financial reports, BBM Canada, BBM Nielsen Media Research, and BBM Analytics' MTM reports; and (3) information previously filed with the CRTC. Unless otherwise noted, all broadcasting data in this report are for the 12-month period ending 31 August for the years quoted, whereas all telecommunications data, including Internet service data, are for the 12-month period ending 31 December for the years quoted.

With respect to residential broadband availability data, the Commission entered into a three-year agreement with Industry Canada, which expires in 2012, to co-operate in the collection of data on the availability of broadband Internet access services to Canadians. The Commission is also collaborating with the provincial and territorial governments, as well as other government agencies and departments, in identifying communities that do not have access to broadband services. The resulting data will assist Industry Canada and the provinces and territories in funding projects that make broadband services available to Canadians who are currently unserved. These data collection initiatives minimize the reporting burden on the industry and enhance the quality of the data presented in this report.

The international comparisons and analyses in this report are based on data obtained from reports published by international organizations such as the OECD and reports or data published by national regulatory agencies in other countries.

Specific elements of the monitoring exercise change over time to take into account regulatory or market developments such as new technologies, changes in market structure or in domestic or international regulations and agreements, or the introduction of new or evolving services. These changes help ensure that the CRTC *Communications Monitoring Report* continues to be a useful tool for all stakeholders, including regulators, customers, and industry players. Certain figures published in previous years' monitoring reports may be restated to be consistent with the data in this report. Other figures may change as a result of service providers resubmitting previous years' data. All revised numbers are identified using a number sign (#).

Outline of Report

This report is divided into a number of sections and appendices. An overview of the Commission's regulatory frameworks is provided in Section 2. Section 3 presents the key financial statistics of the communications service industry. That section also addresses the financial landscape of the broadcasting and telecommunications industries by examining key financial indicators, including revenues, capital expenditures, and other operational data. As well, it provides an overview of the industries. The performance of the Canadian broadcasting system is presented in Section 4, encompassing traditional radio, television, and BDU results, and non-traditional new media broadcasting results. Section 5 discusses the major telecommunications market sectors: wireline voice, Internet, data and private line, and wireless. That section also examines the availability of broadband services. Section 6 presents current regulatory developments in other countries and compares Canada's performance in broadcasting and telecommunications to the performance of those countries.

A description of the data collection methodology and analyses used in this report is provided in Appendix 1. Appendix 2 discusses the CRTC's classification of the TSPs. The status of local forbearance applications relating to residential and business exchanges is presented in Appendix 3. Appendix 4 lists the assumptions used in the development of price comparisons between telecommunications services in Canada and those in other countries. Appendix 5 provides a description of the telecommunications market sectors. Appendix 6 lists all acronyms, and symbols appearing in the report. Appendix 7 and Appendix 8 list the CRTC documents and companies referenced in the report, respectively.

2.0 The CRTC, policies, and regulation

2.1 The CRTC

The CRTC is an independent public authority in charge of regulating and supervising Canadian broadcasting and telecommunications. It serves the public interest and its powers and jurisdiction are set out in the *Acts*. The CRTC reports to Parliament through the Minister of Canadian Heritage. The Governor in Council may issue directions of general application to the Commission on matters related to the telecommunications, broadcasting, or regulatory policy objectives set out in the Acts.

The components of broadcasting policy set out in section 3 of the *Broadcasting Act* are directly or indirectly tied to the cultural, social, political, and economic fabric of Canada, while those of the telecommunications policy set out in section 7 of the *Telecommunications Act* are tied to the country's social and economic fabric.

Access to Canadian content, particularly its creation and availability to Canadians, is the underlying principle of the broadcasting objectives. Canadian content must not only exist, it should also be available to all Canadians both as participants in the industry and as members of the audience. To achieve the objectives of the *Broadcasting Act*, the Commission is guided by the regulatory policy objectives set out in subsection 5(2) of that Act, which requires the Commission to regulate and supervise the broadcasting system in a flexible manner that, among other things, takes into account regional concerns, is adaptable to technological developments, and facilitates the provision of broadcasting and Canadian programs to Canadians.

Pursuant to the *Telecommunications Act*, the Commission strives to ensure the provision of reliable and affordable telecommunications services of high quality accessible to both urban and rural area customers, to foster facilities-based competition, to provide incumbents with incentives to increase efficiencies and be more innovative, and to adopt regulatory approaches, that foster increased reliance on market forces and ensure that regulation, when required, is efficient and effective.

Since December 2006, the Commission has applied the Policy Direction in the exercise of its powers and performance of its duties under the *Telecommunications Act*. The Policy Direction mandates the CRTC to rely on market forces to the maximum extent feasible and, when regulating to do so in a manner that is efficient, proportionate to the purpose of regulation, and interferes with market forces to the minimum extent necessary. The Policy Direction specifies criteria that must be met by any new regulatory measure. The Policy Direction further directs the CRTC to adopt operational practices that promote more efficient, informed, and timely regulation, where required.

In addition to implementing the policy objectives in its governing legislation, the Commission also seeks to ensure that its regulatory frameworks for the Canadian broadcasting and telecommunications industries are keeping pace with emerging technologies. In all of its activities, the Commission is guided by four basic principles: transparency, fairness, predictability, and timeliness. Consequently, it endeavours to make

and publish its decisions promptly and with a clear rationale. To further the transparency of its processes, the CRTC prepares each year (a) a summary of its activities related to the Canadian broadcasting and telecommunications industries, and (b) its three-year work plan in consultation with industry stakeholders. These documents are available to the public on the CRTC's website: <http://www.crtc.gc.ca/eng/publications.htm>

2.2 Regulatory oversight of broadcasting and telecommunications

Overview

The Commission uses a variety of means to exercise its regulatory powers. Under section 6 of the *Broadcasting Act*, the Commission has the power to establish policy guidelines and statements. These policy guidelines and statements are periodically reviewed to ensure that they are current. When reviewing the guidelines and statements, the Commission consults with the industry and the public by holding public proceedings, which can include calls for comments. The Commission also has the power, pursuant to the *Broadcasting Act*, to make regulations³ respecting the Canadian broadcasting industry. Under subsection 9(1) of that Act, the Commission has the authority to establish classes of licence and to impose conditions of licence. To achieve the Canadian broadcasting policy objectives set out in the *Broadcasting Act*, the Commission imposes conditions of licence when it issues a licence and amends these conditions as necessary when renewing the licence.

Pursuant to section 47 of the *Telecommunications Act*, the Commission must exercise its powers and perform its duties under that Act with a view to implementing the telecommunications policy objectives set out in section 7 and ensuring that Canadian carriers provide telecommunications services at rates that do not discriminate unjustly or accord any undue preference⁴, as well as, in accordance with any order made by the Governor in Council or any standards prescribed by the Minister of Industry⁵. In addition to regulating the rates, terms and conditions under which telecommunications services are provided, the Commission has the power to forbear from regulating telecommunications services or classes of service where it finds, among other things, that there is sufficient competition to protect the interests of users⁶.

The Commission fulfils its broadcasting and telecommunications regulatory and supervisory responsibilities by means of a number of interrelated activities, which include:

- i) establishing, monitoring, assessing and reviewing, where appropriate, regulatory frameworks to meet its policy objectives;
- ii) implementing procedures for the efficient and effective resolution of competitive disputes; and
- iii) making determinations on industry mergers, acquisitions and changes of ownership in the industry.

The Commission also monitors the programming and financial obligations of broadcasting undertakings to ensure compliance with regulations and conditions of licence.

³ *Radio Regulations, 1986; Television Broadcasting Regulations, 1987; Broadcasting Information Regulations, 1993; Broadcasting Licence Fee Regulations, 1997; CRTC Rules of Procedure; Broadcasting Distribution Regulations; Pay Television Regulations, 1990; Specialty Services Regulations, 1990.* and in accordance with any order made by the Governor in Council or any standards prescribed by the Minister of Industry

⁴ Subsections 27(1) and 27(2) of the *Telecommunications Act*

⁵ Sections 8, 15 and 47 of the *Telecommunications Act*

⁶ Section 34 of the *Telecommunications Act*

Regulatory framework within a competitive environment

In exercising its statutory powers under the Acts and predecessor legislation, the Commission has, where feasible, gradually and in an orderly manner opened up monopoly-based markets to competition to allow consumers multiple means of receiving programming services that include not only traditional cable companies but also satellite, wireless and telephone companies. In Public Notice 1997-25, the Commission established the conditions of Class 1 undertaking fees.⁷ In the process of opening the BDU market to competition, the Commission has implemented self-regulatory mechanisms in the broadcasting industry where appropriate. The Commission has encouraged industry associations, such as the CAB, to develop self-regulating codes of conduct and standards pertaining to their industries.

Similarly, since the early nineties, the Commission has moved toward greater deregulation of the telecommunications market. In Telecom Decision 94-19, the Commission established a three-step process by which it could determine whether a telecommunications market is or is likely to become competitive for the purpose of considering forbearance applications.⁸

Since 1994, the Commission has forborne, in large part, from regulating a number of telecommunications services including mobile services, retail Internet services, long distance and international services, various data and private line services, terminal equipment and inside wiring, satellite services and services provided by non-dominant carriers. In 2006, the frameworks for the forbearance from regulating retail local exchange services were established. The Forbearance Order amended the Commission's framework established in Telecom Decision 2006-15 for forbearing from regulating retail local exchange services. In the HSDS Decision, the Commission established a framework for forbearing from regulating high-speed DNA services and MWS. In this decision, the Commission also forbore from regulating Bell Canada's high-speed DNA services in a number of wire centres and from regulating the company's MWS in the Toronto, Montréal and Ottawa census metropolitan areas.

The Commission will review the regulatory framework relating to vertical integration (Broadcasting Notice of Consultation CRTC 2010-783) by way of a public hearing to consider whether it is appropriate that it expand upon existing safeguards so as to better take into account systemic changes in the broadcasting industry. In this process, among other things, the Commission will review and, where appropriate, update the issues examined in Broadcasting Public Notice 2005-35 (Good Commercial Practices) including, in particular, "Possible suspension of proposed changes in distribution pending dispute resolution," identified in paragraphs 29 to 33 of the Notice.

Dispute resolution

For the twelve-month fiscal period ending 31 March 2011, the Commission's Broadcasting ADR group commenced with one outstanding formal dispute resolution file from the

⁷ BDUs are classified based on the number of subscribers as follows: Class 1 refers to BDUs with more than 6,000 subscribers, Class 2 includes BDUs that have between 2,000 and 6,000 subscribers and Class 3 encompasses BDUs with fewer than 2,000 subscribers.

⁸ The three steps consisted of (a) identifying the relevant market; (b) determining whether the applicant has market power with respect to the relevant market; and (c) determining whether, and to what extent, forbearance should be granted.

previous fiscal period and opened four new files. All were undue preference files dealing with significant matters raised by the changing dynamics of services and platforms as the broadcasting industry transitions to a digital environment. There remained four dispute files outstanding at the end of the period, of which two were received in June 2010; one was received in December 2010 and one in January 2011.

During the same period, the ADR group assisted parties to fully resolve (i.e. the parties settled on all issues between them) two of the 15 requests for informal interventions that were received, 6 more were concluded and disposed with staff assistance, and seven are still ongoing. It is noteworthy that, similar to the comments provided above for formal disputes, the majority of matters dealt with informally concerned subject matters related to changing platforms or packaging arrangements, disputes born in an environment of changing commercial and regulatory realities. Anecdotal evidence suggests that the submission of matters to the Commission for both formal and informal assistance declined substantially in the last several years as parties waited for the commercial and regulatory environments to become somewhat more clarified.

Statistical information - Regulatory oversight of broadcasting and telecommunications

Table 2.2.1 Broadcasting complaints by sector, by issue

	2007-08		2008-09		2009-10		2010-11	
	Complaints received	Referrals to CBSC	Complaints received	Referrals to CBSC	Complaints received	Referrals to CBSC	Complaints received	Referrals to CBSC
Radio								
Abusive comment ¹	11	-	26	10	22	2	35	5
Adult content	8	3	19	11	10	9	13	5
Alcohol advertising	-	-	6	-	-	-	-	-
Gender portrayal	-	-	1	1	1	1	-	-
Offensive comment ²	89	30	397	308	224	140	220	100
Offensive language ³	24	8	40	23	39	16	296	266
Conventional television								
Abusive comment	5	1	39	5	27	5	26	-
Adult content	84	34	111	47	87	25	52	8
Alcohol advertising	4	-	17	1	5	1	4	-
Gender portrayal	-	-	5	2	9	2	2	-
Offensive comment	107	6	455	61	260	133	135	22
Offensive language	34	14	51	20	47	19	41	19
Television violence	40	9	85	24	56	20	84	14
Specialty channels								
Abusive comment	2	-	10	-	2	-	-	-
Adult content	32	14	82	39	41	10	31	10
Alcohol advertising	1	-	1	-	2	-	-	-
Gender portrayal	-	-	-	-	-	-	-	-
Offensive comment	12	2	212	202	22	12	19	5
Offensive language	7	2	32	23	25	8	13	6
Television violence	14	5	20	14	19	9	21	5
Pay television and pay-per-view services								
Abusive comment	-	-	-	-	-	-	-	-
Adult content	4	-	402	1	24	3	32	-
Alcohol advertising	-	-	-	-	-	-	-	-
Gender portrayal	-	-	-	-	-	-	-	-
Offensive comment	-	-	2	-	-	-	-	-
Offensive language	-	-	-	-	-	-	-	-
Television violence	-	-	-	-	-	-	-	-
Subscription radio (Satellite)								
Abusive comment	-	-	-	-	-	-	-	-

• For the 12 month period: 1 April to 31 March

1. Where a complaint alleges that hatred or contempt was incited on-air against one of the groups identified in the television, radio, or specialty regulations.
2. Where a complaint alleges offensive humour or other comments that do not fall under the “abusive comment” provision.
3. Where a complaint alleges offensive language in song lyrics or in spoken word.

Source: CRTC Correspondence Tracking System (The Rapids tracking system counts multiple contacts from the same client on the same complaint as separate units. The actual number of complaints received should be therefore slightly lower.)

Table 2.2.2 Number of contacts by public

	2007-08	2008-09	2009-10	2010-11
Broadcasting related enquiries	14,594	7,131	5,747	6,261
Broadcasting complaints	5,581	11,851	12,740	10,813

• For the 12 month period: 1 April to 31 March
 Source: CRTC Correspondence Tracking System (The Rapids tracking system counts multiple contacts from the same client on the same complaint as separate units, therefore the actual number of complaints received should be slightly lower.)

Table 2.2.3 Complaints handled by the CBSC

	2007-08	2008-09	2009-10
Files handled by the CBSC	1,498	1,781	2,035
Referred by the CRTC	979	1,045	761

Source: CBSC annual reports

Table 2.2.4 Complaints handled by the ASC

	2006	2007	2008	2009	2010
Complaints received by the ASC	1,040	1,445	1,119	1,228	1,200
Complaints about television ads	527	857	528	546	526
<i>Percent of total complaints received</i>	51%	59%	47%	44%	44%
Complaints about radio ads	73	52	56	64	67
<i>Percent of total complaints received</i>	7%	4%	5%	5%	5%

Source: Ad complaints reports

Statistical Information - Dispute resolution

Table 2.2.5 Number of dispute files received in 2010/2011

	Disputes/mediation	Final Offer Arbitration/Expedite
Broadcasting	20	2
Telecommunications	5	2
Total	25	4

• For the period 1 April 2010 to 31 March 2011
 Source: CRTC internal tracking

Table 2.2.6 Number of broadcasting dispute files received in 2010/2011

	Formal dispute files	Informal interventions
Building access	0	0
Distribution/programming	5	15
Total	5	15

• For the period 1 April 2010 to 31 March 2011
 Source: CRTC internal tracking

2.3 Contribution and spending regimes

The Commission uses a number of approaches to achieve the cultural, social and economic objectives set out in the Acts. One such method has been the establishment of contribution and spending regimes.

In 2010, broadcasting and telecommunications providers contributed \$3.1 billion towards the achievement of these objectives. Approximately 95% of these funds were for cultural and programming initiatives under the *Broadcasting Act* and the remaining 5% were for the achievement of the social and economic objectives under the *Telecommunications Act*.

Contribution and spending regimes at a glance

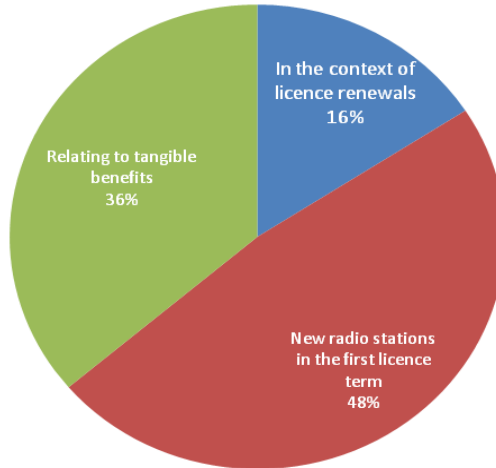
(\$ millions)	2009	2010	% Growth
CCD reported by commercial radio and audio services	51	46	-9.6
Television CPE	2,429	2,431	0.1
BDU contribution to Canadian programming	352	368	4.6
LPIF	-	101	-
Subsidization of residential telephone in high-cost serving areas	182	165	-9.3

Source: CRTC Data Collection

Statistical information: Contribution and spending regimes - Broadcasting

The following contribution and spending regimes are based on the 1 September 2009 to 31 August 2010 broadcast year. Refer to the broadcasting section of this report for additional statistical information. These charts do not reflect additional funding, incentives or contributions made by private institutions or government bodies towards the development and production of Canadian audio and visual content that are outside of the CRTC’s administrative scope and mandate.

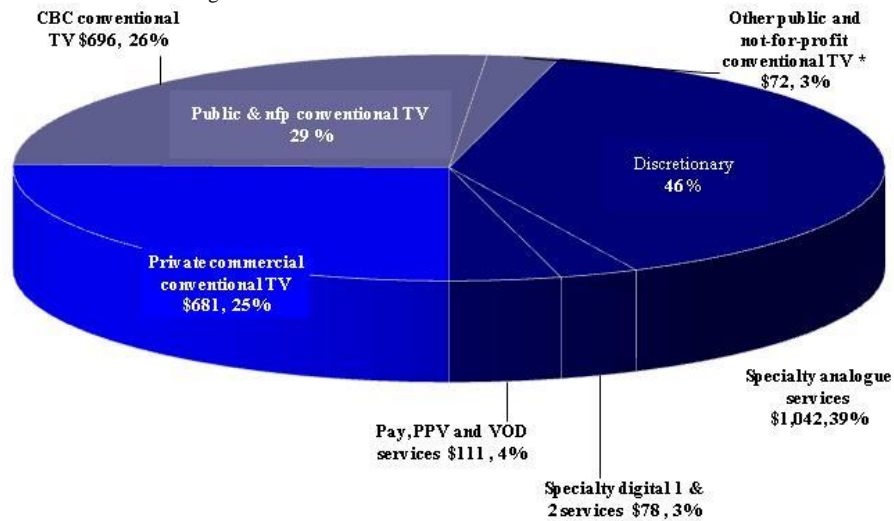
Figure 2.3.1 2010 Contributions to CCD reported by commercial radio & audio services, \$46.1 million



- Minor variances are due to rounding.
 - Includes contributions made under both the CTD and CCD regimes.
- Source: CRTC data collection

Figure 2.3.2 2010 Television CPE, \$2.4 billion

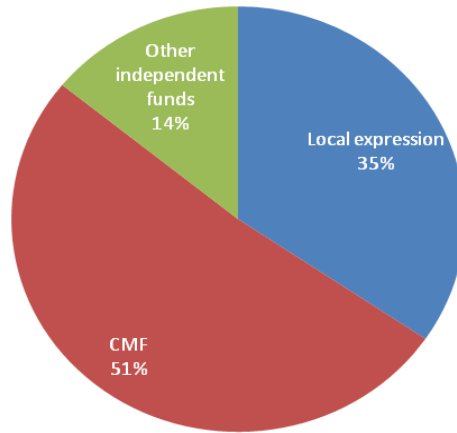
- Minor variances are due to rounding.



- CPE: Includes expenditures on Canadian programs telecast, write-down of Canadian inventory, script and concepts and loss on equity Canadian programs.
- Includes expenditures relating to ownership transfer benefits and to commitments made at the time of licensing. Excludes CMF “top-up” reported by private conventional, specialty, Pay, PPV and VOD television services.
- CBC conventional television excludes indirect and facility cost allocations. Certain programming related expenses are included as programming costs beginning in 2008 consistent with CRTC guidelines.

* Estimate
Source: CRTC data collection

Figure 2.3.3 2010 BDU contributions to Canadian programming and local expression, \$368 million



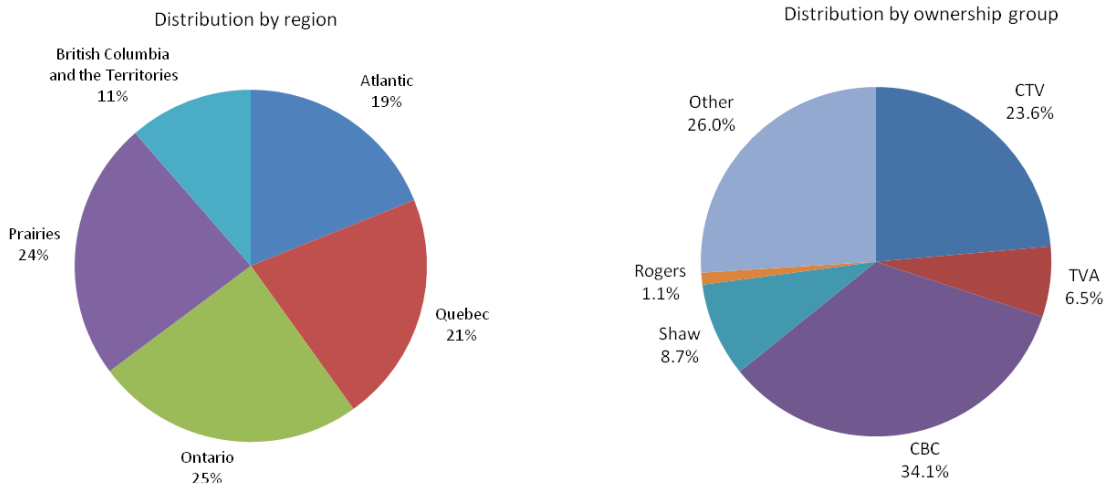
• Minor variances are due to rounding.
Source: CRTC data collection

Table 2.3.1 LPIF – Contributions and number of recipients

Year	Contributions (\$ millions)	Number of recipients		LPIF funding as a percentage of total recipients' revenues (excluding the CBC)
		Licensees	Stations	
2009-2010	100.7	16	79	10.8%

• Based on the 1 September 2009 to 31 August 2010 broadcast year
Source: CRTC data collection

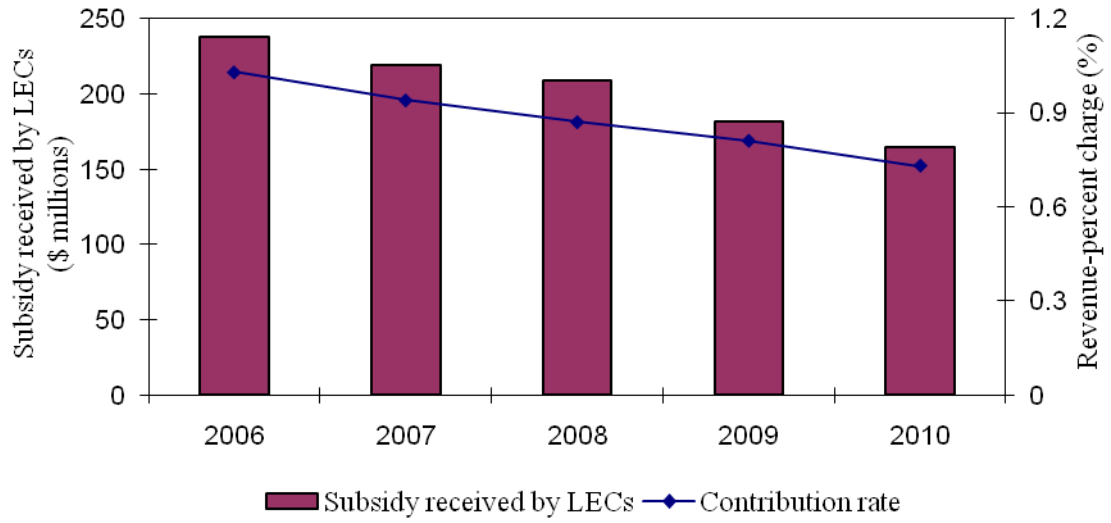
Figure 2.3.4 LPIF distribution by region and owner group



Source: CRTC data collection

Statistical Information: Contribution and spending regimes – Telecommunications

Figure 2.3.5 Subsidy paid to LECs and the revenue-percent charge

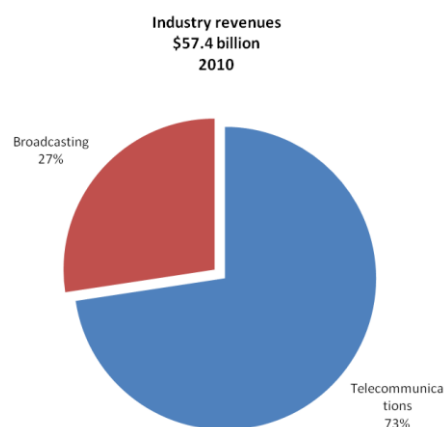


Sources: CRTC data collection and decisions

3.0 The Communications service industry

3.1 Overview

This section provides a broad overview of the broadcasting and telecommunications service industries (the Canadian communications service industry), and briefly examines the extent to which industry participants offer communications services outside of their traditional core services. In 2005, revenues of incumbent TSPs and cable companies, as a percent of total communications revenues, were approximately 59% and 23%, respectively. At the end of 2010, their revenues represented 51% and 32% of total communications revenues, respectively. The financial performance of individual sectors within broadcasting and telecommunications is found in sections 4 and 5.



Communications service industry at a glance

(\$ billions)	2009	2010	% Growth
Communications revenues	55.4	57.4	3.6
Broadcasting	14.4	15.7	8.9
Radio	1.5	1.6	2.9
TV	5.5	6.1	10.6
BDU	7.4	8.1	8.9
Telecommunications	41.0	41.7	1.8
Communications revenues by type of provider			
Incumbent TSPs	28.8	29.1	0.8
Cable companies	17.3	18.4	7.2
Other	9.3	9.1	-2.1
Communications revenues to GDP (%)	4.6%	4.6%	

Source: CRTC data collection

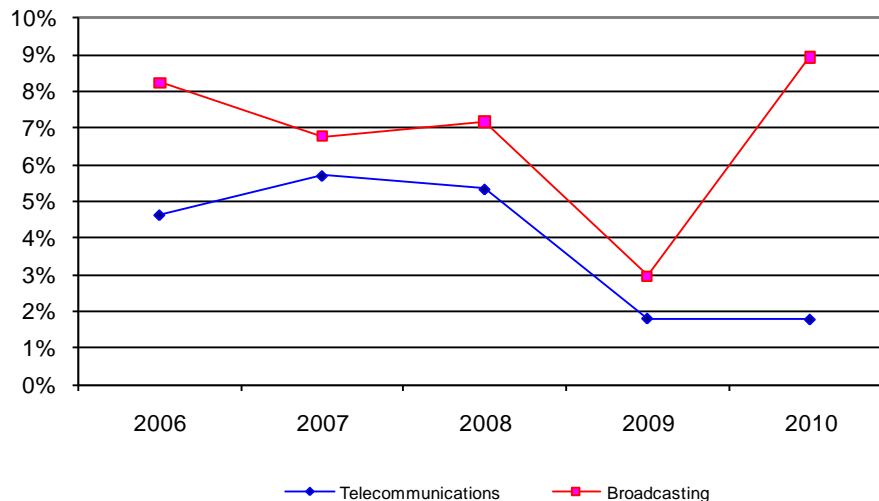
Statistical information – Financial overview

Table 3.1.1 Communications revenues (\$ billions)

	2006	2007	2008	2009	2010	CAGR 2006-2010
Telecommunications						
Wireline	23.4 #	23.6 #	24.2 #	24.0 #	23.7	0.3%
<i>Annual growth</i>	-0.5%	1.2% #	2.2% #	-0.5% #	-1.6%	
Wireless	12.7	14.5	16.0	16.9	18.0	9.1%
<i>Annual growth</i>	15.5%	14.4%	10.4%	5.3%	6.6%	
Subtotal	36.1	38.2 #	40.2 #	40.9 #	41.7	3.7%
<i>Annual growth</i>	4.6%	5.8% #	5.3% #	1.8% #	1.8%	
Broadcasting						
Radio AM/FM	1.4	1.5	1.6	1.5 #	1.6	2.3%
<i>Annual growth</i>	5.8%	6.2%	5.9%	-5.2% #	2.9%	
Television	5.0	5.3	5.5	5.5 #	6.1	4.7%
<i>Annual growth</i>	8.0%	4.4%	4.3%	-0.1% #	10.6%	
BDU	5.8	6.3 #	6.9 #	7.4 #	8.1	8.8%
<i>Annual growth</i>	9.1%	9.0% #	9.9% #	7.2% #	8.9%	
Subtotal	12.2	13.1 #	14.0 #	14.4 #	15.7	6.4%
<i>Annual growth</i>	8.2%	6.8% #	7.2% #	3.0% #	8.9%	
Total revenues						
	48.3	51.2 #	54.2 #	55.3 #	57.4	4.4%
<i>Annual growth</i>	5.5%	6.0% #	5.8% #	2.1% #	3.6%	

Source: CRTC data collection

Figure 3.1.1 Broadcasting and telecommunications annual revenue growth rates



Source: CRTC data collection

Table 3.1.2 Industry revenues by type of provider (\$ thousands)

	2008	2009	2010	CAGR 2008-2010
Incumbent TSPs				
Telecommunications	27,151.5	27,179.7	27,169.8	0.0%
<i>Annual growth</i>	1.7%	0.1%	0.0%	
BDUs	1,510.0	1,662.4	1,899.1	12.1%
<i>Annual growth</i>	15.2%	10.1%	14.2%	
Subtotal	28,661.5	28,842.1	29,068.9	0.7%
<i>Annual growth</i>	2.3%	0.6%	0.8%	
Utility telcos and other TSPs	585.8	723.7	713.5	10.4%
<i>Annual growth</i>	20.0%	23.5%	-1.4%	
Resellers	1,862.2	1,594.7	1,533.8	-9.2%
<i>Annual growth</i>	4.9%	-14.4%	-3.8%	
Cable Companies				
Telecommunications	10,598.5 #	11,428.4 #	12,237.0	7.5%
<i>Annual growth</i>	15.5% #	7.8% #	7.1%	
BDUs	5,427.8 #	5,778.4 #	6,206.9	6.9%
<i>Annual growth</i>	8.5% #	6.5% #	7.4%	
Subtotal	16,026.3 #	17,206.7 #	18,443.8	7.3%
<i>Annual growth</i>	13.1% #	7.4% #	7.2%	
Broadcasting - Other entities	7,070.5 #	6,983.1 #	7,609.6	3.7%
<i>Annual growth</i>	4.6% #	-1.2% #	9.0%	
Total	54,206.3 #	55,350.2 #	57,369.5	2.9%
<i>Annual growth</i>	5.8% #	2.1% #	3.6%	

Source: CRTC data collection

Table 3.1.3 Industry convergence: Cable v. Telecommunications

Year	Percent of incumbent BDUs' revenues from telecom services ¹	Percent of ILECs' revenues from BDU services
2010	66.3%	6.5%
2009	66.4% #	5.8%
2008	66.1% #	5.3%
2007	64.7%	4.7%

1. Telecom services include: Local & access, long distance, Internet, data & private line, and wireless.

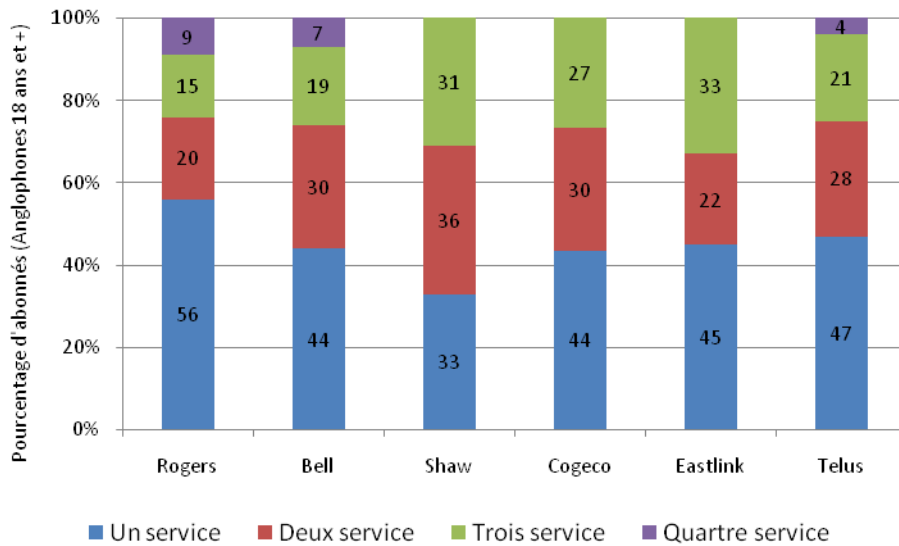
Source: CRTC data collection

Table 3.1.4 Percent of broadcasting and telecommunications revenues generated by companies operating in multiple markets

Number of markets	Number of reporting companies operating in these markets	Percent of broadcasting and telecommunications revenues generated in these markets
11	3	63
10	1	4
9	0	0
8	3	21
7	2	3
6	5	0
5	12	0
4	22	3
3	29	1
2	41	2
1	223	2

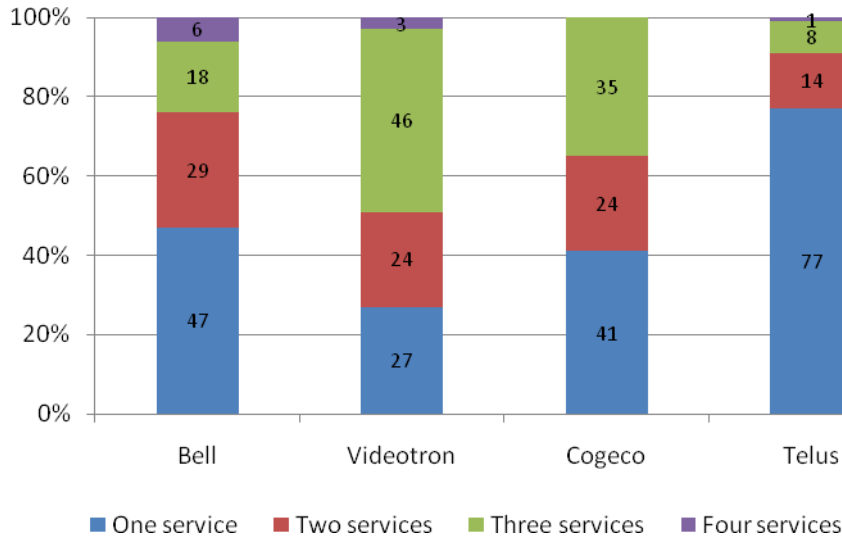
- Number of markets include: 5 broadcasting markets (Radio, television, BDU, speciality, and VOD, pay & PPV markets) and 6 telecommunications markets (Local & access, long distance, Internet, data, private line, and wireless market).
 - 2010 data restated to reflect industry players as of Q1 2011.
 - Affiliates are included with their parent company
- Source: CRTC data collection

Figure 3.1.2 Number of services received in the home, by service provider (Anglophone market 18+)



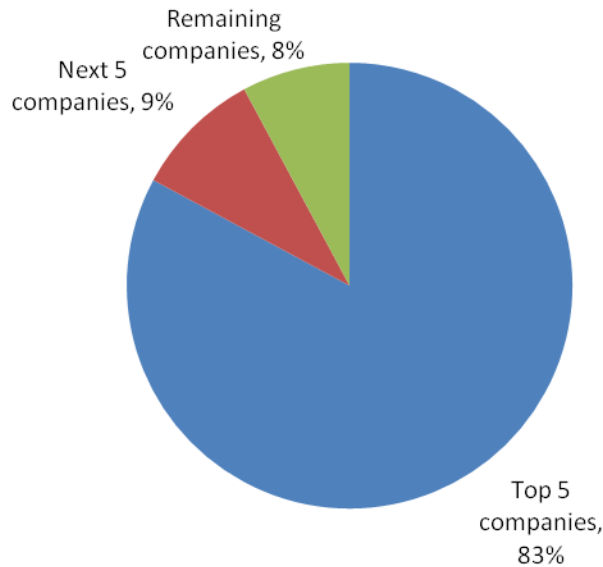
- Services included in the survey were: TV, Internet, cell and home phone
- Source: MTM 2010-2011

Figure 3.1.3 Number of services received in the home, by service provider (Francophone market 18+)



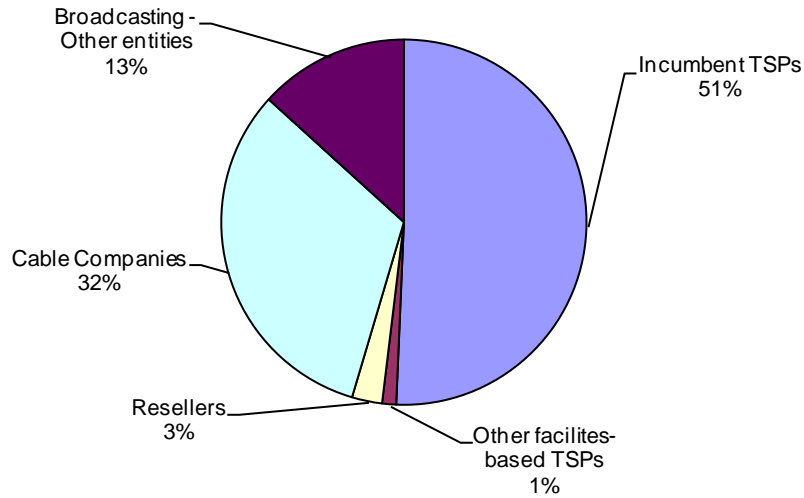
• Services included in the survey were: TV, Internet, cell and home phone
 Source: MTM 2010-2011

Figure 3.1.4 Broadcasting and telecommunications revenues for the top 5 group of companies, the next top 5 group and the remaining companies (2010)



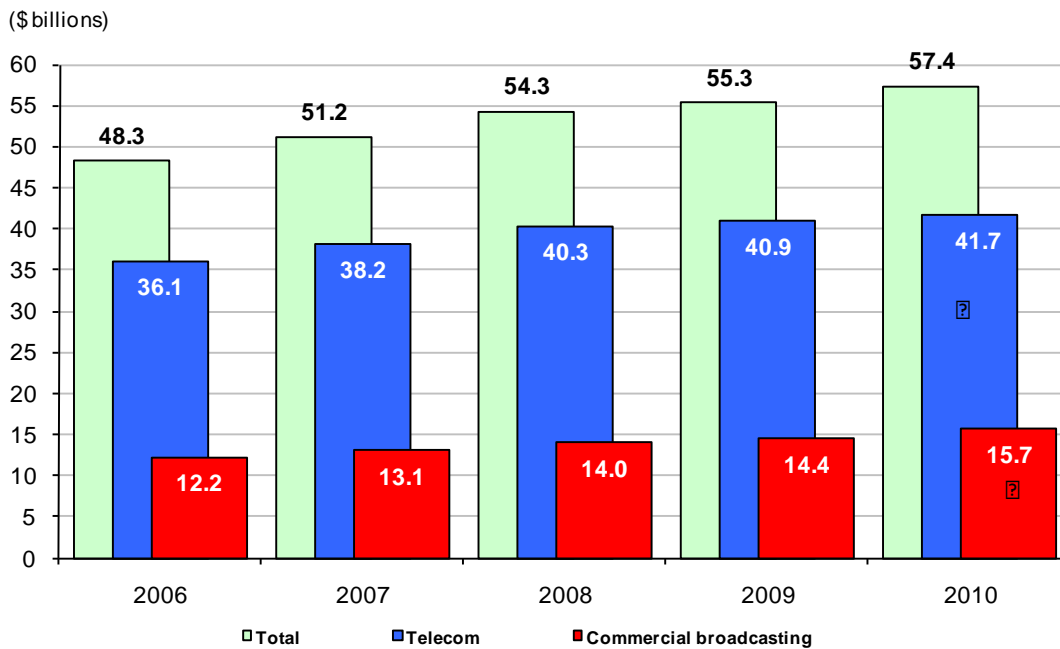
• Revenues for the top companies includes the revenues of their affiliates.
 • Affiliates are included with their parent company
 Source: CRTC data collection

Figure 3.1.5 Broadcasting and telecommunications revenues by type of provider (2010)



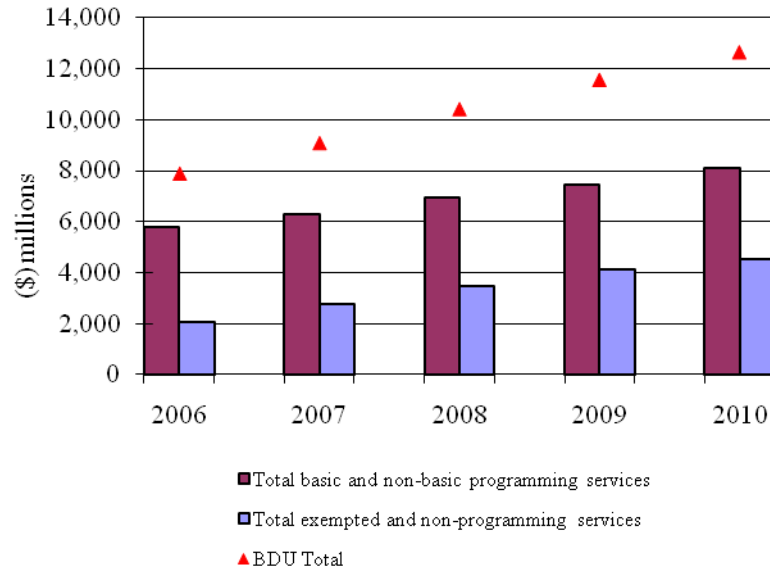
Source: CRTC data collection

Figure 3.1.6 Commercial broadcasting and telecommunications revenues (Excluding non-programming and exempt services)



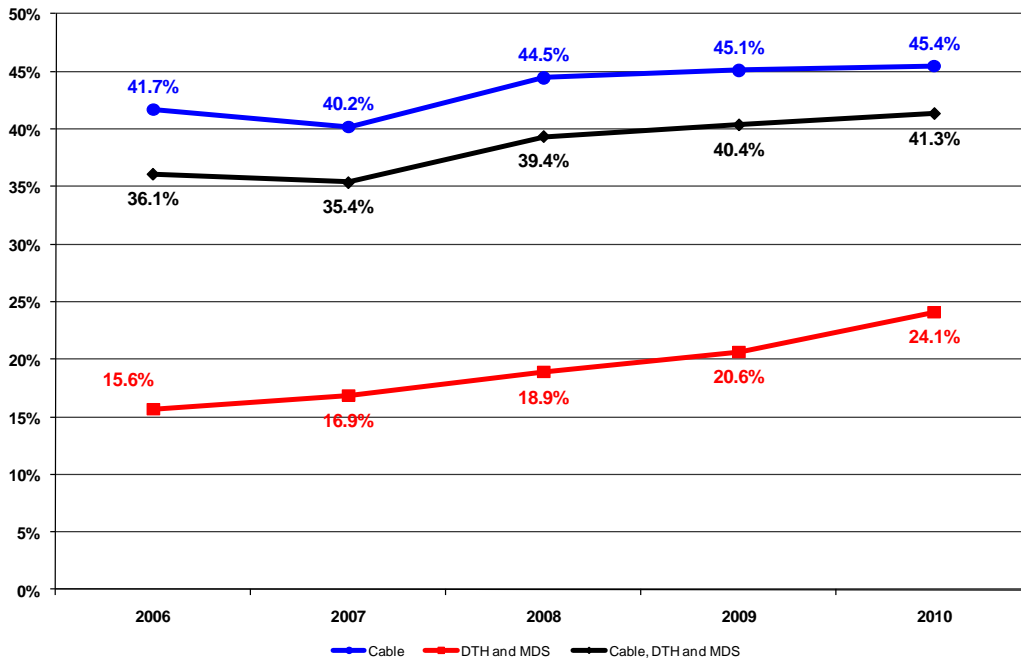
Source: CRTC data collection

Figure 3.1.7 BDU revenues by service type



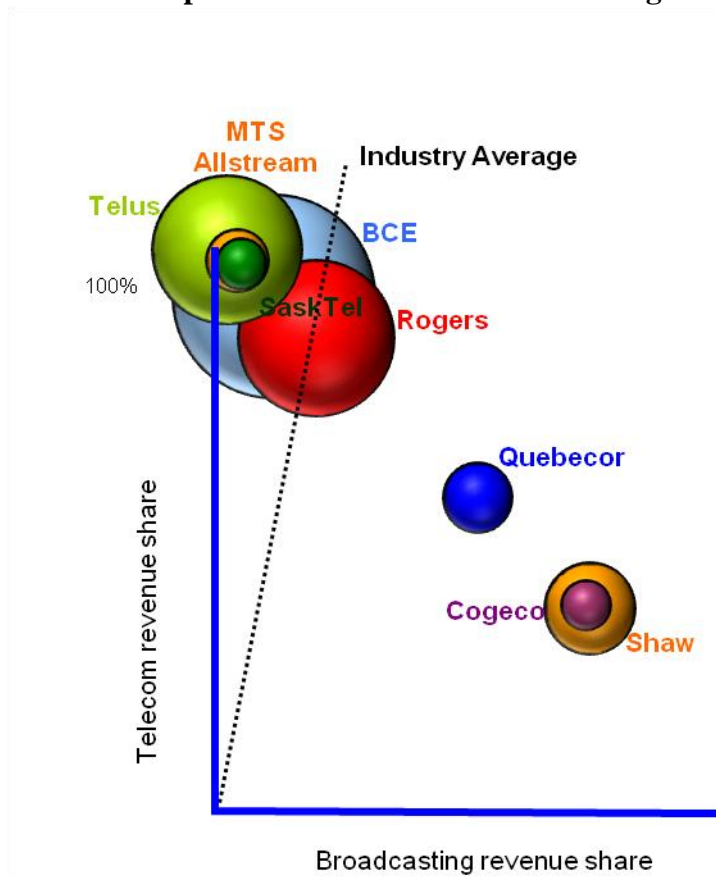
Source: CRTC data collection

Figure 3.1.8 BDU – EBITDA margins achieved from all services (programming, exempted and non-programming services)



Source: CRTC data collection

Figure 3.1.9 Canadian broadcasting and telecommunications revenue composition for a select number of large companies



- Bubbles represent estimated Canadian telecommunications and broadcasting revenues in 2010. Source: Company websites and other public annual reports

Figure 3.1.10 Broadcasting and telecommunications operating platforms

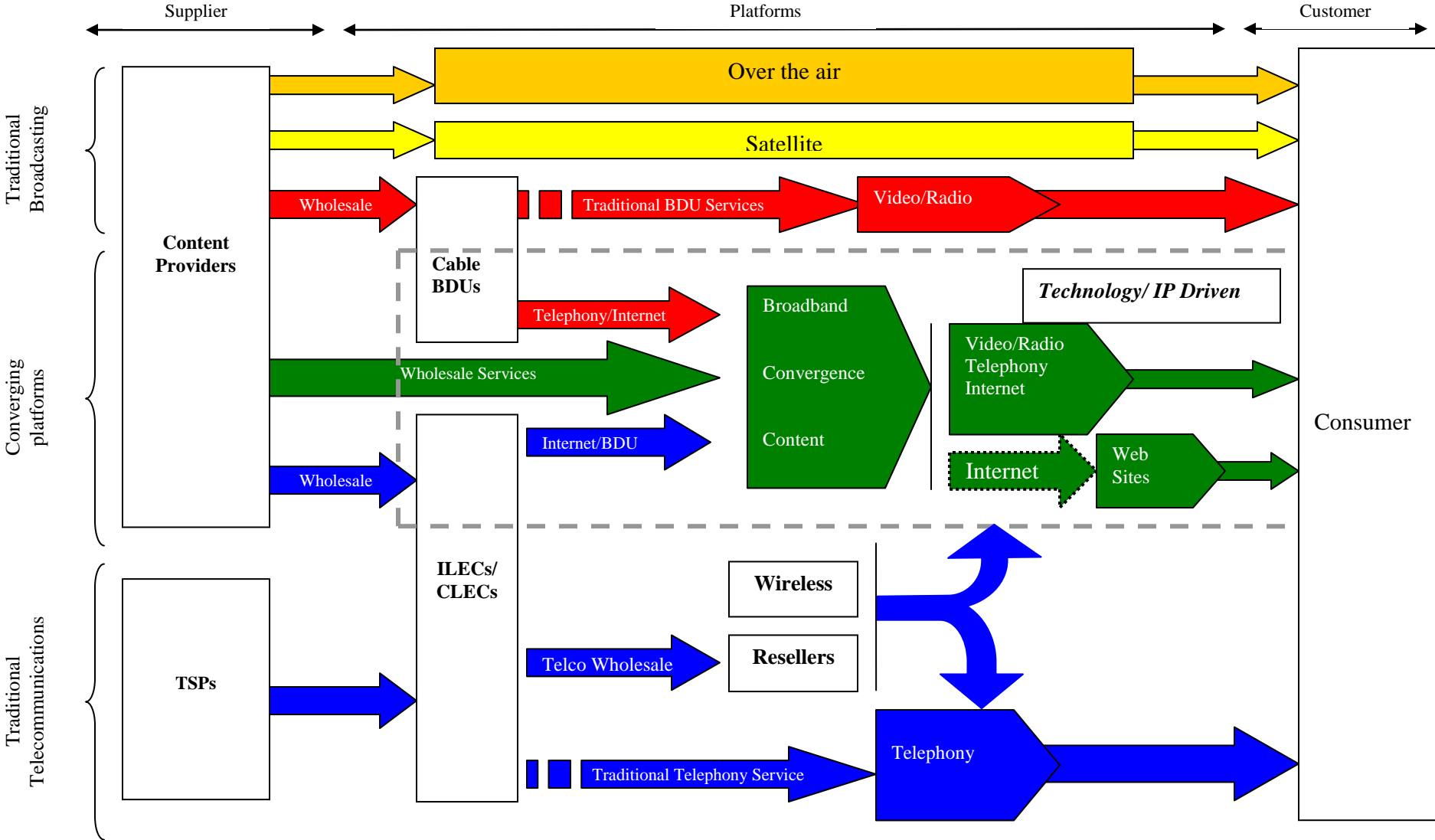
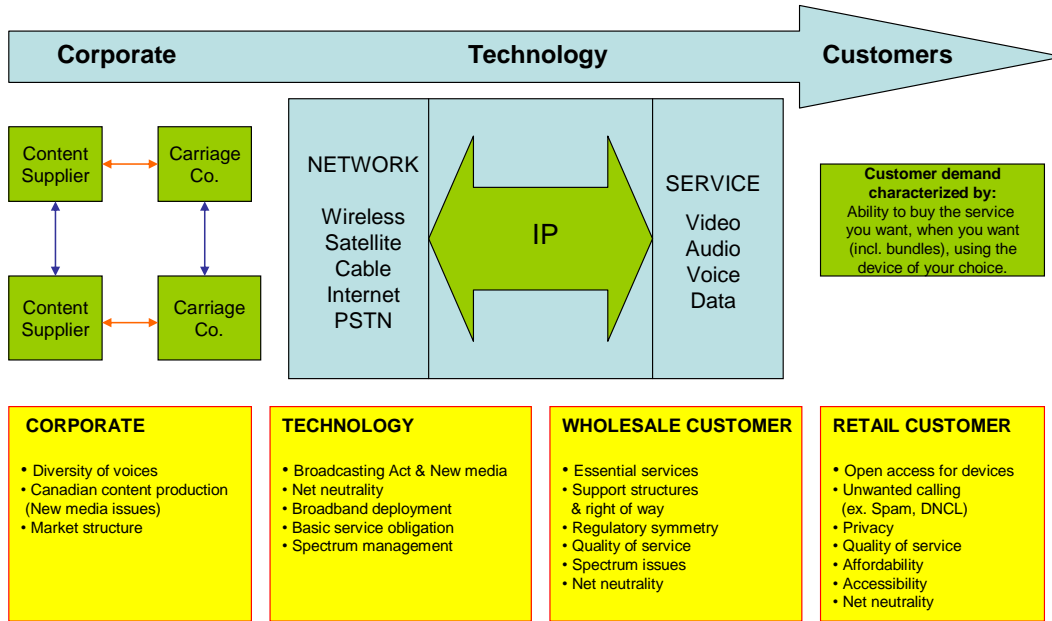


Figure 3.1.11 Regulatory considerations in a converging industry



4.0 Broadcasting

There are three delivery platforms for the broadcast of radio and television programming:

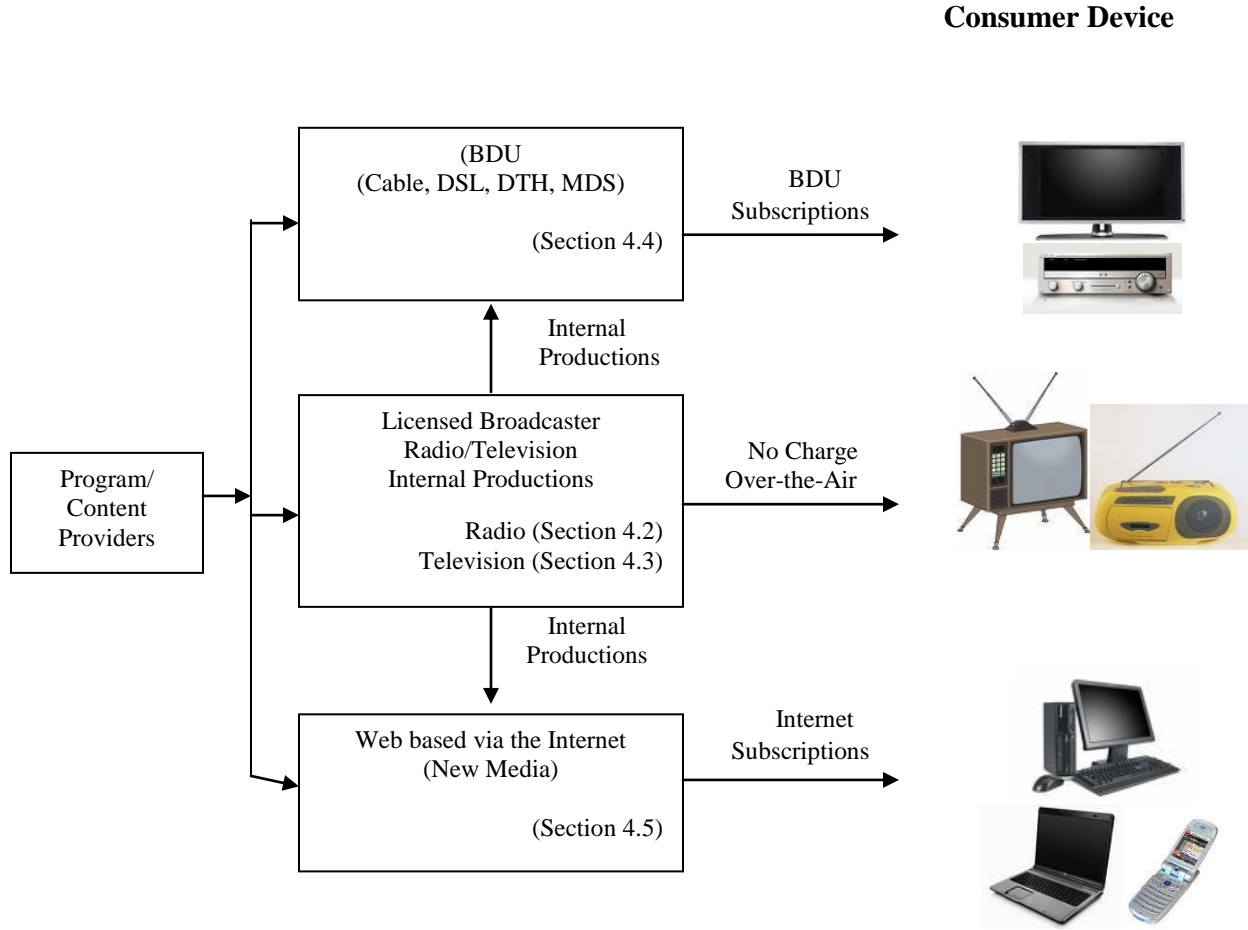
- i) conventional transmission where the licensed broadcasters transmit either radio or television programs to the general public free of charge over assigned frequencies or channels in the appropriate spectrum (AM, FM, VHF, UHF, or L-Band);
- ii) over dedicated landline (cable or DSL) or wireless (satellite, DTH, or MDS) facilities of licensed BDUs that transmit radio and television programming over their networks to subscribers of their services for a monthly subscription fee; and,
- iii) more recently, via the Internet using web-based facilities or sites to subscribers of high-speed or broadband Internet service.

Various models have been developed by the providers to recover the costs of the content that users access via the Internet. These models range from free, as the costs are recovered through advertisements (Joost and Hulu), to subscription based (Jump TV), to pay-per-view (Apple TV).

Broadcasters that produce their own content can broadcast their content over their facilities, use their web-based facilities or use the services of a BDU.

These services are available virtually to all Canadians.

Diagram 4.0.1 Program distribution

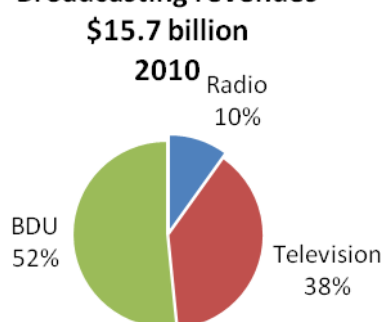


4.1 Broadcasting - Financial review

Overview

Broadcasting revenues include revenues from radio, television, and BDUs. Radio revenues include AM and FM commercial radio stations. Television revenues include CBC conventional television, private conventional television, and pay, PPV, VOD and specialty services. BDU revenues include cable and DTH/MDS as well as IPTV services, but exclude Internet and telephony service revenues.

Broadcasting revenues



Broadcasting at a glance

	2009	2010	% Growth
Revenues (\$ millions)			
Broadcasting	14,424 #	15,713	8.9
Radio	1,508 #	1,552	2.9
Television	5,475 #	6,055	10.6
BDU ^{1,2}	7,441 #	8,106	8.9
PBIT (\$ millions)			
Radio	272	298	9.9
Television	612 #	889	45.3
EBITDA (\$ millions)			
BDU	1,781	2,001	12.3

1. BDU revenues include non-reporting BDU revenues, but exclude exempt and non-programming services. The EBITDA of the BDUs represents only basic and non-basic services.

2. Internet and telephony services are excluded. These services are discussed in section 5 of this report.

Source: CRTC data collection

Statistical Information – Broadcasting revenues
Table 4.1.1 Broadcasting revenues (\$ millions)

	2006	2007	2008	2009	2010	CAGR 2006-2010
Radio						
AM	322	329	331	306 #	307	-1.1%
<i>Annual growth</i>	5.2%	2.4%	0.4%	-7.4% #	0.4%	
FM	1,097	1,173	1,260	1,201	1,244	3.2%
<i>Annual growth</i>	5.8%	6.9%	7.5%	-4.7%	3.6%	
Radio total	1,419	1,502	1,591	1,508 #	1,552	2.3%
<i>Annual growth</i>	5.7%	5.9%	5.9%	-5.2% #	2.9%	
Television						
CBC conventional television ¹	392	356	412	392 #	450	3.5%
<i>Annual growth</i>	34.2%	-9.2%	15.7%	-4.9% #	14.8%	
Private conventional television	2,143	2,171	2,138	1,971	2,147	0.1%
<i>Annual growth</i>	-0.1%	1.3%	-1.5%	-7.8%	9.0%	
Pay, PPV, VOD, and specialty service	2,499	2,729	2,929	3,113 #	3,457	8.5%
<i>Annual growth</i>	12.5%	9.2%	7.3%	6.3% #	11.1%	
Television total	5,034	5,256	5,480	5,475 #	6,055	4.7%
<i>Annual growth</i>	8.0%	4.4%	4.3%	-0.1% #	10.6%	
BDU						
Cable	4,008	4,334	4,762	5,123	5,594	8.7%
<i>Annual growth</i>	13.8%	8.1%	9.9%	7.6%	9.2%	
DTH/MDS undertakings	1,641	1,834	2,036	2,196 #	2,385	9.8%
<i>Annual growth</i>	14.1%	11.8%	11.0%	7.8% #	8.6%	
Non-reporting BDUs	144	144 #	140 #	122 #	126	-3.2%
<i>Annual growth</i>	-59.3%	0.4% #	-3.0% #	-12.5% #	3.0%	
BDU Total	5,793	6,312 #	6,938 #	7,441 #	8,106	8.8%
<i>Annual growth</i>	9.0%	9.0% #	9.9% #	7.2% #	8.9%	
Broadcasting Total						
	12,246	13,070 #	14,008 #	14,424 #	15,713	6.4%
<i>Annual growth</i>	8.2%	6.7% #	7.2% #	3.0% #	8.9%	

1. CBC revenues include advertising and other commercial revenues. Parliamentary appropriations are excluded.

Source: CRTC data collection

Table 4.1.2 Percent of broadcasting revenues generated by companies operating in multiple markets

Number of markets	Number of reporting companies operating in these markets	Percent of broadcasting revenues generated in these markets
5	3	68
4	2	14
3	1	0
2	17	10
1	168	7

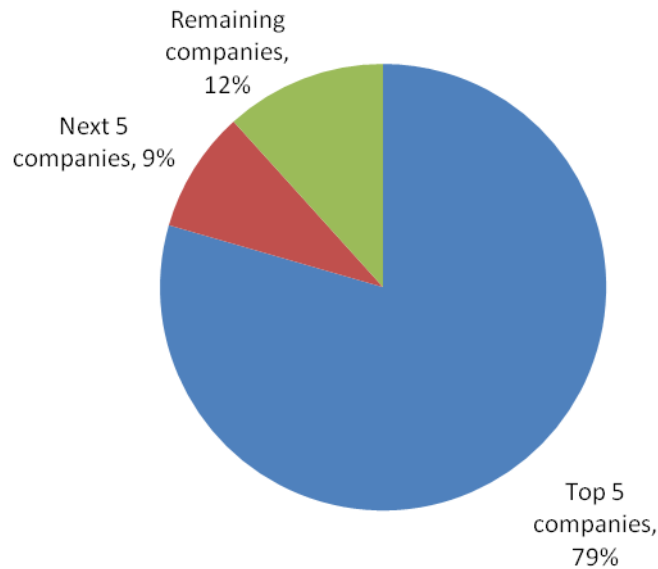
1. Number of markets includes radio, television, BDU, specialty, and VOD, pay & PPV markets.

2. 2010 data restated to reflect industry players as of 30 March 2011

3. Affiliates are included with their parent company

Source: CRTC data collection

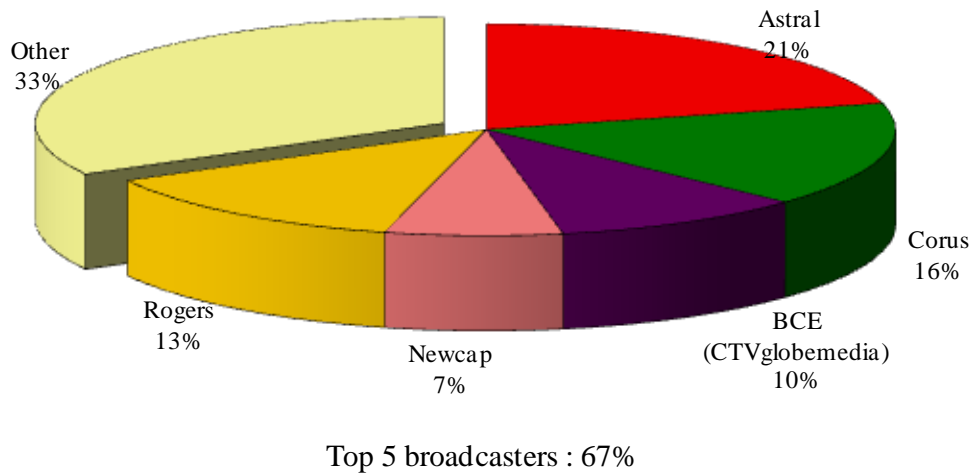
Figure 4.1.1 Broadcasting revenues for the top 5 group of companies, the next top 5 group and the remaining companies (2010)



- Revenues for the top companies include the revenues of their affiliates.
- Affiliates are included with their parent company

Source: CRTC data collection

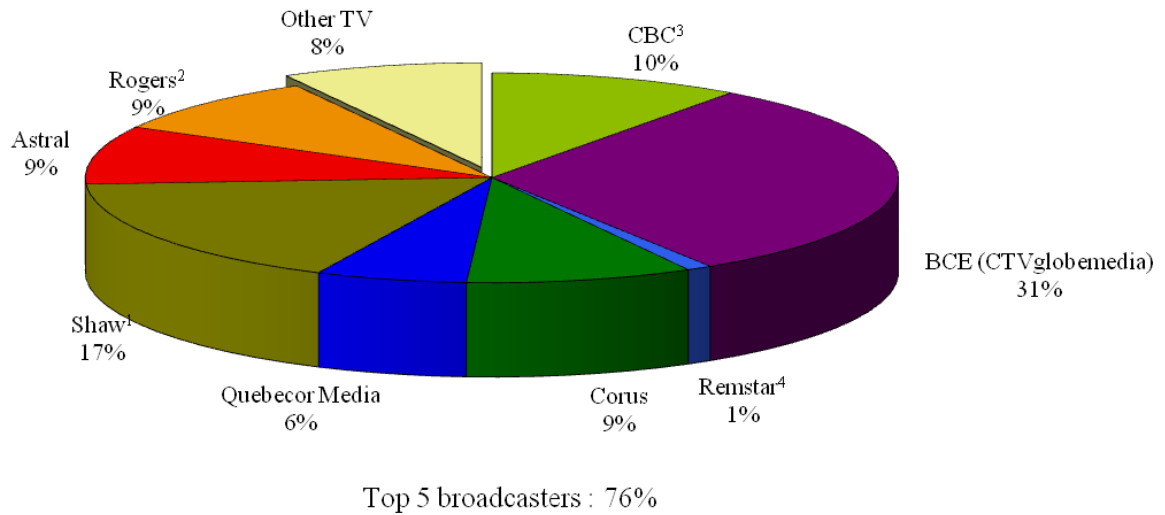
Figure 4.1.2 2010 Commercial radio revenues by broadcaster



- The percentage of total revenue calculation is based on total revenues reported for each service where the broadcaster had greater than 50% direct and indirect voting interest as of 31 August 2010.
- Following a change in effective control, Canwest's properties are now controlled by Shaw (Broadcasting Decision 2010-782).

Source: CRTC data collection

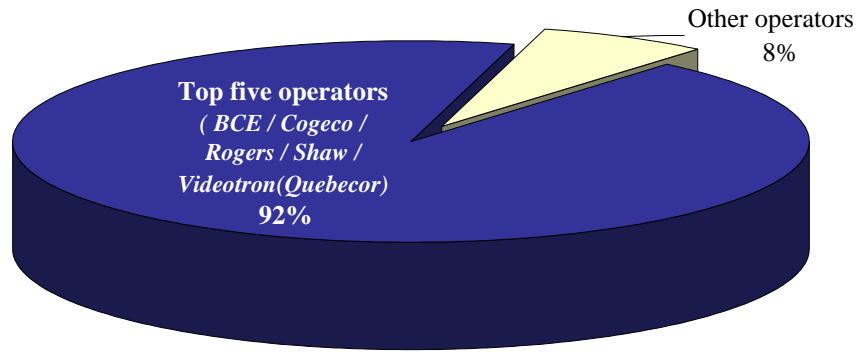
Figure 4.1.3 2010 Commercial television revenues by broadcaster



- Percentage of total revenue calculation is based on total revenues reported for each service where the broadcaster had greater than 50% and/or direct and indirect voting interest as at 31 August 2010.
 - Following a change in effective control, CTV's properties are now controlled by BCE (Broadcasting Decision 2011-163).
1. In December 2007, the Commission approved an application by Canwest for authority to transfer effective control of Alliance Atlantis Broadcasting Inc.'s television specialty services.
 2. In September 2007, the Commission approved an application by Rogers Broadcasting Inc. or authority to transfer effective control of the five OTA CityTV stations previously owned and operated by CHUM Limited.
 3. Based on advertising, subscriber and other commercial revenues only and does not include parliamentary appropriations.
 4. Includes conventional TQS stations. In June 2008 the Commission approved, subject to certain conditions, the acquisition by Remstar Diffusion Inc. of TQS's network and television stations in Montréal, Québec, Trois-Rivières, Sherbrooke and Saguenay. The Commission also approved the acquisition by CBC of the assets of the French-language television programming undertakings CKSH-TV Sherbrooke, CKTM-TV Trois-Rivières and CKTV-TV Saguenay and its transmitter CKTV-TV-1 Saint-Fulgence, Quebec, from TQS inc.

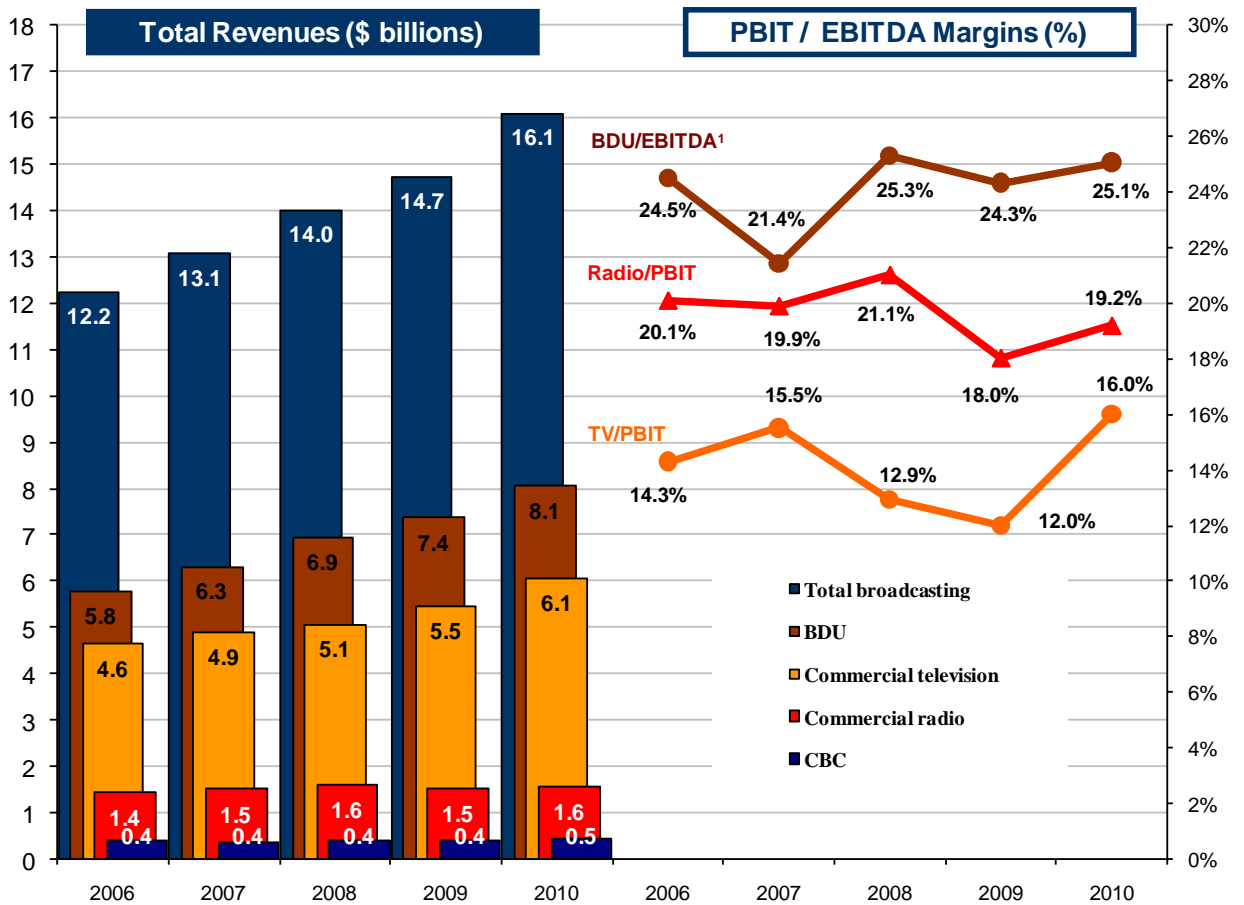
Source: CRTC data collection

Figure 4.1.4 2010 BDU revenues by operator



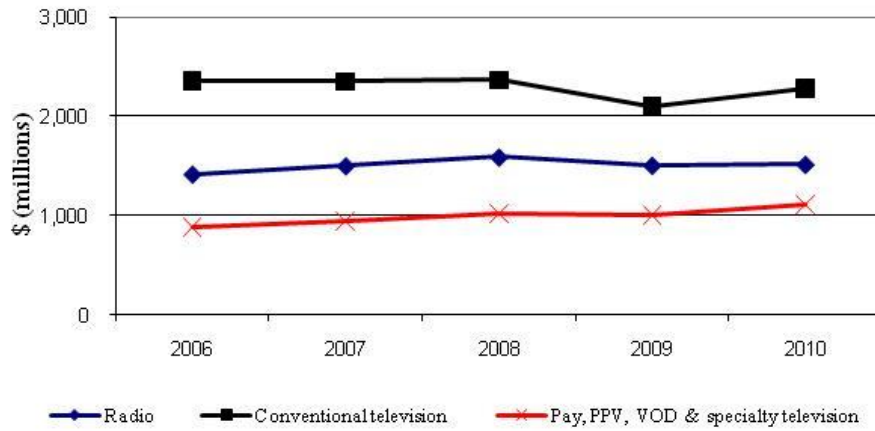
• Includes non-reporting BDU revenues
Source: CRTC data collection

Figure 4.1.5 Total broadcasting revenues and PBIT/EBITDA margins



1 BDU revenues include non-reporting BDU revenues, but exclude exempt and non-programming services. BDU EBITDA represents only basic and non-basic services.
Source: CRTC data collection

Figure 4.1.6 Canadian advertising revenues



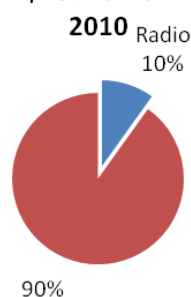
Source: CRTC data collection

4.2 Radio market sector

Overview

The radio market sector in Canada consists of over 1,200 radio and audio services. Ninety-nine percent of these radio and audio services are over-the-air while the remaining 1% are delivered by BDUs. Canada's national broadcaster, the CBC, accounts for approximately 8% of radio and audio services while the private commercial broadcasters account for 61%. The remaining 30% consists of religious, community, campus, Aboriginal and other radio and audio services.

Broadcasting revenues
\$15.7 billion



Radio sector at a glance

	2009	2010	% Change
Number of radio and audio services in Canada	1,221	1,208	-1.1
English-language	910	904	-0.7
French-language	265	266	0.4
Third-language	46	38	-17.4
Total number of private commercial radio and audio services in Canada	736	733	-0.4
English-language share	81%	81%	
French-language share	15%	15%	
Total commercial radio revenues (\$ millions)	1,508	1,552	2.9
English-language share	82%	81%	
French-language share	16%	16%	
Largest private commercial radio operators (% of total revenues)			
English-language market - top 5	71%	70%	
French-language market - top 3	82%	83%	
Private commercial broadcasters PBIT (\$ millions)	272	298	9.9
English-language broadcasters	234	252	7.8
French-language broadcasters	35.4	42.0	18.6
Average weekly hours tuned per capita	17.7	17.6	-0.6
Private commercial radio tuning share in an average week	79.0%	79.2%	

Source: CRTC data collection

Statistical Information – Radio market sector
Table 4.2.1 Number and type of radio and audio services authorized to broadcast in Canada

	English Language ¹		French Language ²		Third Language		All Languages	
	2009	2010	2009	2010	2009	2010	2009	2010
Over-the-air radio services³								
National public broadcaster								
CBC Radio One / Première chaîne ⁴	38	38	20	20			58	58
CBC Radio 2 / Espace Musique	14	14	12	12			26	26
CBC Radio network licences	2	2	2	2			4	4
CBC digital: Radio One / Première chaîne ⁵	5	4	4	3			9	7
CBC digital: Radio 2 / Espace musique ⁵	5	4	4	3			9	7
Private Commercial								
AM stations	128	122	9	9	13	12	150	143
FM stations ⁴	433	436	94	95	12	12	539	543
AM and FM network licenses ⁶	4	4	2	2			6	6
Digital radio (stand-alone and transitional) ⁵	32	32	4	4	5	5	41	41
Religious (music and spoken word)⁷	47	45	27	27	1	1	75	73
Community								
Type A stations ⁸	11	11	33	34			44	45
Type B stations	31	32	33	33	1	1	65	66
Developmental	9	6					9	6
Campus								
Community based	36	36	5	5			41	41
Instructional	10	10					10	10
Developmental							0	0
Aboriginal - Type B stations⁸	36	36	9	9			45	45
Other (tourist/traffic, Environment Canada, special event, other network licences, etc)	60	63	7	8	2	2	69	73
Total number of over-the-air Canadian radio services	901	895	265	266	34	33	1,200	1,198
Multi-channel subscription radio services & Audio services delivered by BDUs								
Satellite subscription radio service	2	2					2	2
Terrestrial subscription radio service	0	0					0	0
Specialty audio (commercial / Non-profit, regional / national)	3	3			12	5	15	8
Pay audio (English and French national services)	4	4					4	4
Total number of Canadian radio and audio services	910	904	265	266	46	38	1,221	1,208

• Number of services approved, but not necessarily broadcasting. Unless a request for an extension of time is approved by the Commission, most undertakings must be operational within 24 months of the decision date. The data is as of 31 December 2010.

1. English-language includes bilingual (English and French) and English-native services.
2. Includes French-native services.
3. Over-the-air radio services exclude radiocommunication distribution undertakings (RDU), rebroadcasters and exempted radio services.
4. Approval of a new FM radio station, resulting from an AM to FM band conversion, will result in the station counted as both an AM and an FM station until the AM licence is surrendered by the licensee - roughly three months after AM and FM simulcast transition period.
5. Number of transitional digital radio stations approved but not necessarily on air.
6. Most of the commercial network licences noted here fall under Broadcasting Public Notice CRTC 2006-143 and will not need to be renewed after their current licence term expires.
7. Religious (music and spoken word) includes commercial and not-for-profit religious radio stations.
8. Community Type A stations and aboriginal Type B stations excludes network licences.

Source: CRTC internal database

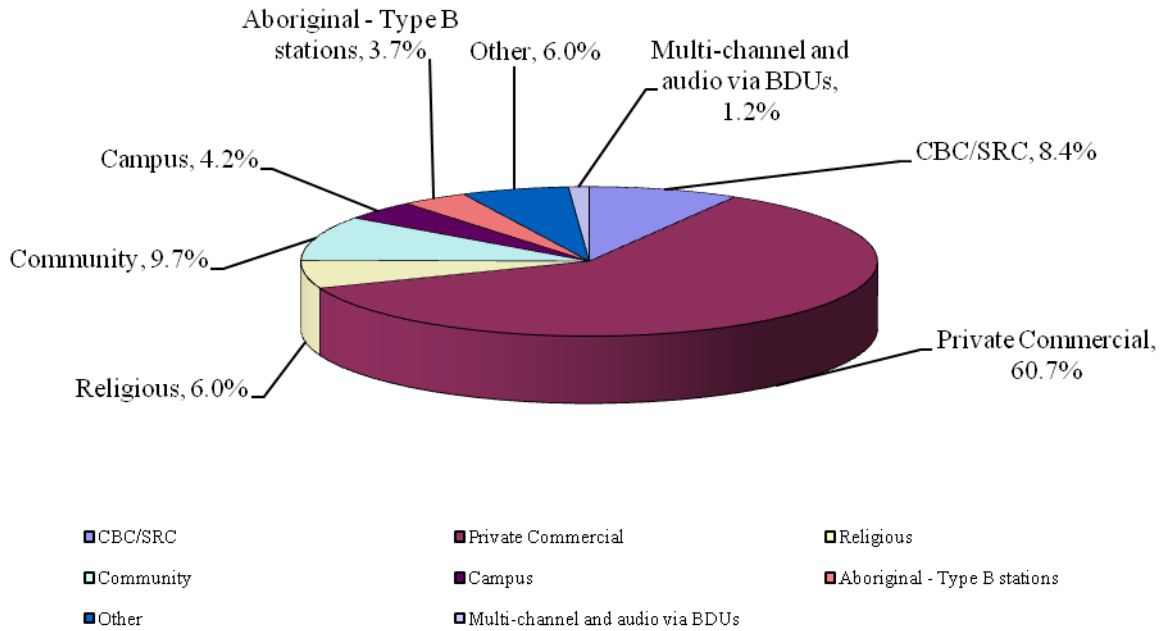
Table 4.2.2 Number of new over-the-air radio stations approved from 1 January 2006 to 31 December 2010

		2006	2007	2008	2009	2010	Total
<i>Number of new over-the-air radio stations approved</i>		44	72	55	43	16	230
<i>Number of stations approved by:</i>							
<i>Language</i>	English-language	54	46	40	32	16	188
	French-language	16	7	2	5	0	30
	Ethnic	2	2	1	0	0	5
<i>Licence category</i>	Commercial	48	36	34	21	11	150
	Community	13	7	6	11	2	39
	Campus	3	3	-	-	-	6
	Native	2	4	2	1	1	10
	Other	6	5	1	4	2	18
<i>Type</i>	Stand-alone digital	-	-	-	-	-	0
	Digital Radio	-	2	-	-	-	2
	AM Frequency	4	2	-	1	-	7
	FM Frequency	68	51	43	36	16	214
	<i>AM to FM Conversions (included in FM)</i>	12	13	7	8	4	44
<i>Process</i>	Competitive	18	17	23	8	1	67
	Non-Competitive	54	38	20	29	15	156

- RDU, rebroadcasters, pay audio, specialty audio services and multi-channel subscription radio services are excluded.
- “Other licence category” includes not-for-profit, CBC/SRC, tourist, Environment Canada, etc. radio stations.

Source: CRTC Decisions issued from 1 January 2006 to 31 December 2010

Figure 4.2.1 Type of radio and audio services authorized to broadcast in Canada (2010)



Source: CRTC data collection

Table 4.2.3 Average weekly hours tuned per capita by age group

	2006	2007	2008	2009	2010
Weekly hours per age group					
All persons 12+	18.6	18.3	18.3	17.7	17.6
Annual Growth	-2.6%	-1.6%	0.0%	-3.2%	-0.6%
Teens 12 - 17	7.6	7.2	7.2	6.8	7.0
Annual Growth	-11.6%	-5.3%	0.0%	-6.2%	3.0%
Adults					
18 - 24	14.1	13.3	13.1	12.0	11.9
Annual Growth	-7.2%	-5.7%	-1.5%	-8.0%	-1.0%
25 - 34	18.3	17.4	17.3	16.6	15.8
Annual Growth	1.1%	-4.9%	-0.6%	-4.1%	-4.6%
35 - 49	20.6	20.2	19.9	19.2	19.1
Annual Growth	-1.9%	-1.9%	-1.5%	-3.2%	-0.4%
50 - 54	21.0	21.2	21.5	20.6	21.0
Annual Growth	-2.3%	1.0%	1.4%	-3.9%	1.6%
55 - 64	21.1	21.1	21.1	20.8	20.8
Annual Growth	-3.7%	0.0%	0.0%	-1.4%	0.4%
65 +	21.3	21.5	21.6	21.0	20.7
Annual Growth	-1.4%	0.9%	0.5%	-2.9%	-1.1%

• Average weekly hours per capita is determined by dividing the total number of hours tuned by the population.
 Source: BBM Canada Fall 2010 Radio Survey Data – all persons 12+, Monday to Sunday, 5 a.m. to 1 a.m. (Total Canada).

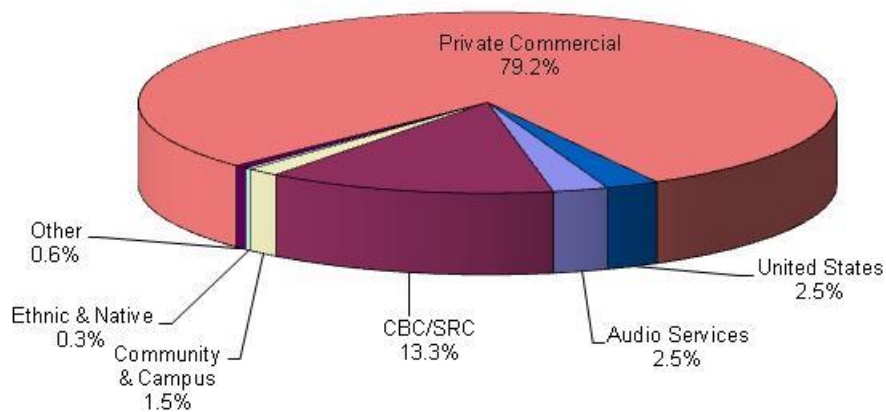
Table 4.2.4 Radio tuning share in an average week and average weekly hours tuned by listener for English- and French-language AM and FM bands

	2006	2007	2008	2009	2010	% growth 2009-2010
Percentage of Hours Tuned (%)						
English-language AM	19.3	19.1	18.7	17.7	17.4	-1.6%
English-language FM	55.0	54.8	54.0	54.9	55.3	0.7%
<i>Subtotal</i>	<i>74.3</i>	<i>73.9</i>	<i>72.7</i>	<i>72.6</i>	<i>72.6</i>	
<i>Annual Growth</i>	<i>0.8%</i>	<i>-0.5%</i>	<i>-1.6%</i>	<i>-0.1%</i>	<i>0.0%</i>	
French-language AM	1.6	0.9	0.9	1.1	0.8	-27.3%
French-language FM	17.9	18.7	19.9	19.6	20.0	2.0%
<i>Subtotal</i>	<i>19.5</i>	<i>19.6</i>	<i>20.8</i>	<i>20.7</i>	<i>20.8</i>	
<i>Annual Growth</i>	<i>-6.2%</i>	<i>0.5%</i>	<i>6.1%</i>	<i>-0.5%</i>	<i>0.5%</i>	
Other	6.2	6.5	6.5	6.7	6.6	
<i>Annual Growth</i>	<i>10.7%</i>	<i>4.8%</i>	<i>0.0%</i>	<i>3.1%</i>	<i>-1.5%</i>	
Average weekly hours per listener						
	20.4	20.2	20.0	19.5	19.4	
<i>Annual Growth</i>	<i>-1.4%</i>	<i>-1.0%</i>	<i>-1.0%</i>	<i>-2.5%</i>	<i>-0.5%</i>	
Total average national hours (millions)						
	525.5	521.3	530.6	525.1	515.7	
<i>Annual Growth</i>	<i>-1.1%</i>	<i>-0.8%</i>	<i>1.8%</i>	<i>-1.0%</i>	<i>-1.8%</i>	

- Average weekly hours per listener are determined by dividing the total number of hours tuned by reach.
- “Other” is principally over-the-air tuning to U.S. border stations. “Other” also includes tuning to Internet radio that is not attributed to Canadian over-the-air radio stations, multi-channel subscription (satellite radio) services, pay and specialty audio services, over-the-air and video services available on cable and unknown.

Source: BBM Canada – Fall 2006 to Fall 2010 Radio Diary Surveys for all persons 12+, Monday to Sunday, 5 a.m. to 1 a.m. (Total Canada); and CRTC data collection.

Figure 4.2.2 Radio tuning share in an average week



- “Audio Services” includes tuning to: multi-channel subscription (satellite radio) services, pay and specialty audio services, over-the-air radio stations, and video services broadcast on cable and the Internet.

Source: BBM Canada – Fall 2010 Radio Diary Surveys for all persons 12+, Monday to Sunday, 5 a.m. to 1 a.m. (Total Canada); and CRTC data collection.

Table 4.2.5 Fall tuning achieved by the largest private commercial radio operators in Canada

Listening hours (thousands) per corporation	2008	2009	2010	
			PPM	Diary
Astral <i>Share</i>	91,712 <i>31%</i>	89,679 <i>31%</i>	38,754 <i>31%</i>	37,720 <i>31%</i>
BCE <i>Share</i>	38,047 <i>13%</i>	36,867 <i>13%</i>	13,250 <i>11%</i>	16,815 <i>14%</i>
Cogeco <i>Share</i>	13,027 <i>4%</i>	13,175 <i>4%</i>	7,359 <i>6%</i>	3,816 <i>3%</i>
Corus <i>Share</i>	83,495 <i>28%</i>	81,589 <i>28%</i>	39,484 <i>32%</i>	25,121 <i>21%</i>
Newcap <i>Share</i>	25,014 <i>8%</i>	22,087 <i>8%</i>	3,727 <i>3%</i>	19,598 <i>16%</i>
Rogers <i>Share</i>	46,053 <i>15%</i>	49,513 <i>17%</i>	21,888 <i>18%</i>	19,091 <i>16%</i>
Total listening hours for largest private commercial radio operators	297,348 <i>100%</i>	292,910 <i>100%</i>	124,462 <i>100%</i>	122,160 <i>100%</i>

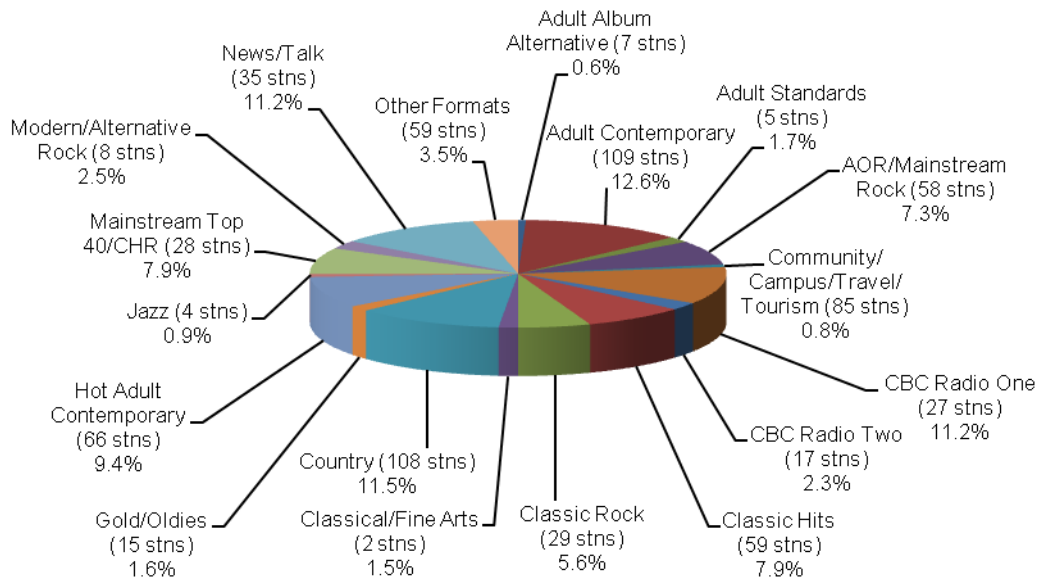
- Refer to “Notes to tables 4.2.6, 4.2.7 and 4.2.9” found under Table 4.2.9.
 - In 2009, diary data is included from a limited sample in Montréal.
 - In 2010, tuning data was captured using one of two methods, PPM meters or the traditional diary method. The results from these two methodologies cannot be combined due to the differences in the underlying methodologies in capturing the data.
 - The largest private commercial radio operators revenue share represents 67% of the total commercial radio revenues in Canada.
- Source: 2008 and 2009: BBM Canada S4 (Fall) 2008 to Fall 2009 Radio Diary Surveys, 5 a.m. to 1 a.m., all persons 12+ (Total Canada); 2010 BBM Canada, PPM weeks 1-13 (30 August to 28 November, inclusive), all Persons 12+, Monday to Sunday, 2 a.m. to 2 a.m. and diary, Fall 2010 Radio Survey Data (6 September to 31 October, inclusive) all Persons 12+, Monday to Sunday, 5 a.m. to 1a.m.; and CRTC data collection.

Table 4.2.6 Fall tuning achieved by largest English- and French-language private commercial radio operators in Canada

Listening hours (thousands) per Corporation	2008	2009	2010	
			PPM	Diary
Largest Canadian English-language radio operators				
Astral	59,836	58,846	29,381	20,367
<i>Share</i>	26%	26%	31%	22%
BCE	38,047	36,867	13,250	16,815
<i>Share</i>	17%	16%	14%	18%
Corus	60,417	58,968	26,616	18,671
<i>Share</i>	26%	26%	28%	20%
Newcap	25,014	22,087	3,727	19,598
<i>Share</i>	11%	10%	4%	21%
Rogers	46,053	49,513	21,888	19,091
<i>Share</i>	20%	22%	23%	20%
Total listening hours for largest private English commercial operators	229,365	226,281	94,862	94,541
	100%	100%	100%	100%
Largest Canadian French-language radio operators				
Astral	31,876	30,833	9,373	17,353
<i>Share</i>	47%	46%	32%	63%
Cogeco	13,027	13,175	7,359	3,816
<i>Share</i>	19%	20%	25%	14%
Corus	23,078	22,621	12,868	6,450
<i>Share</i>	34%	34%	43%	23%
Total listening hours for largest private French commercial operators	67,981	66,629	29,600	27,619
	100%	100%	100%	100%

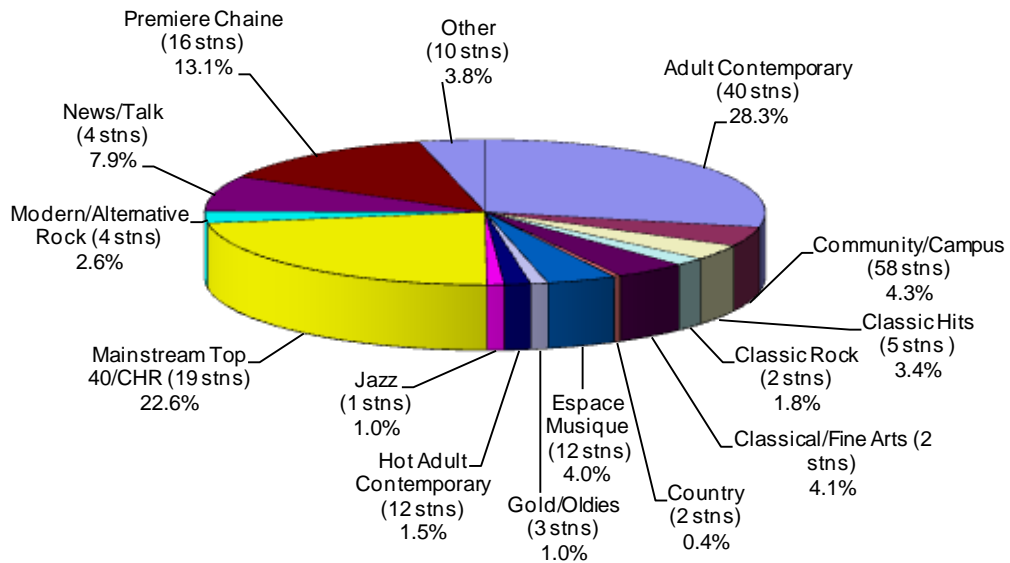
- Refer to “Notes to tables 4.2.6, 4.2.7 and 4.2.9” found under Table 4.2.9.
 - In 2009, diary data is included from a limited sample in Montréal.
 - In 2010, tuning data was captured using one of two methods, PPM meters or the traditional diary method. The results from these two methodologies cannot be combined due to the differences in the underlying methodologies in capturing the data.
 - The largest private commercial radio operators revenue share represents 67% of the total commercial radio revenues in Canada.
- Source: 2008 and 2009: BBM Canada S4 (Fall) 2008 to Fall 2009 Radio Diary Surveys, 5 a.m. to 1 a.m., all persons 12+ (Total Canada); 2010 BBM Canada, PPM weeks 1-13 (30 August to 28 November, inclusive), all Persons 12+, Monday to Sunday, 2 a.m. to 2 a.m. and diary, Fall 2010 Radio Survey Data (6 September to 31 October, inclusive) all Persons 12+, Monday to Sunday, 5 a.m. to 1 a.m.; and CRTC data collection.

Figure 4.2.3 Radio tuning shares - English-language station formats



Source: BBM Canada Fall 2010 Radio Diary Survey for all persons 12+, Monday to Sunday, 5 a.m. to 1 a.m. (Total Canada); and CRTC data collection

Figure 4.2.4 Radio tuning shares - French-language station formats



Source: BBM Canada Fall 2010 Radio Diary Survey for all persons 12+, Monday to Sunday, 5 a.m. to 1 a.m. (Total Canada); and CRTC data collection

Table 4.2.7 Revenues and number of undertakings reporting financial results for private commercial radio stations – English- and French-language, and Ethnic

	2006	2007	2008	2009	2010	% growth 2009- 2010	CAGR 2006- 2010
Revenues (\$ millions)							
AM English-language	281.9	291.6	295.5	271.9	272.1	0	-1%
AM French-language	18.6	16.2	12.7	11.6	11.2	-3	-12%
AM Ethnic	21.1	21.8	22.5	22.7	24	6	3%
AM Total	321.6	329.6	330.7	306.2	307.3		-1%
<i>Annual Growth</i>	5%	3%	0%	-7%	0%		
FM English-language	879.8	946.3	1,018.0	958.5	986.6	3	3%
FM French-language	202.3	210.8	225.3	226.8	239.9	6	4%
FM Ethnic	15.1	16.1	16.8	16.2	17.9	10	4%
FM Total	1,097.2	1,173.2	1,260.1	1,201.5	1,244.4		3%
<i>Annual Growth</i>	6%	7%	7%	-5%	4%		
Total revenues	1,418.8	1,502.8	1,590.8	1,507.7	1,551.8	3	2%
Number of undertakings reporting financial results							
AM English-language	153	148	136	129	120	-7	-6%
AM French-language	15	13	10	9	9	0	-12%
AM Ethnic	8	10	10	12	12	0	11%
AM total	176	171	156	150	141		-5%
<i>Annual Growth</i>	-2%	-3%	-9%	-4%	-6%		
FM English-language	325	347	378	396	416	5	6%
FM French-language	83	87	87	90	87	-3	1%
FM Ethnic	9	9	9	10	10	0	3%
FM total	417	443	474	496	513		5%
<i>Annual Growth</i>	8%	6%	7%	4%	3%		
Total number of undertakings reporting	593	614	630	646	654	1	2%

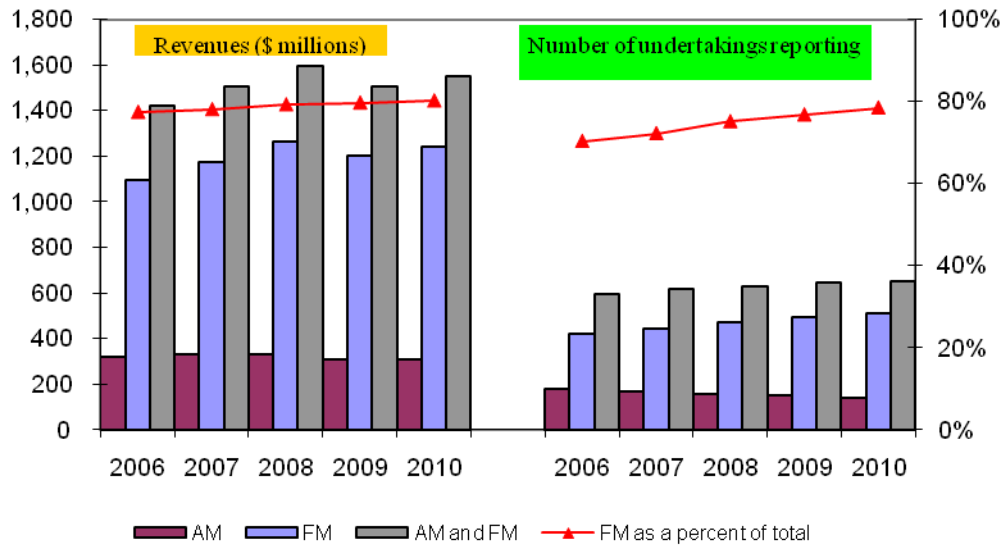
- Network results are included.
 - Pay and specialty audio programming services as well as multi-channel subscription radio services are excluded from the table above.
 - 2009 figures have been updated to reflect current August aggregate results.
 - Minor variances are due to rounding.
- Source: CRTC data collection

Table 4.2.8 CBC radio revenues

Revenues (\$ thousands)	2009	2010
Advertising revenues	0	0
<i>Annual growth</i>	-	0%
Parliamentary appropriation ¹	n.a.	346,548
<i>Annual growth</i>	-	-
Sales/Syndication of programs	417	893
<i>Annual growth</i>	-	114%
Miscellaneous ¹	415,929	10,856
<i>Annual growth</i>	-	nm
Total revenues	415,347	358,298
<i>Annual growth</i>	-	-14%
Number of units	82	82

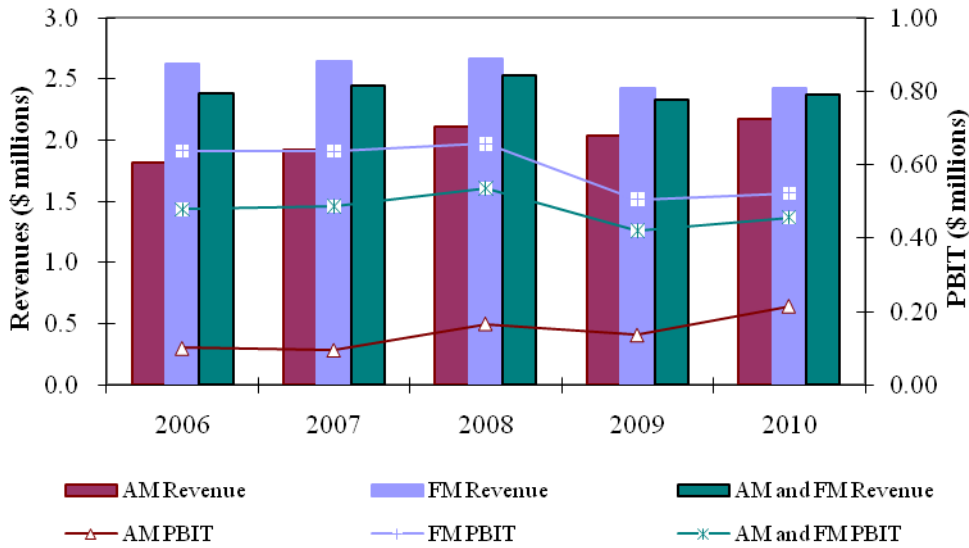
1. Parliamentary appropriation was included in “Miscellaneous” for 2009.
Source: CRTC data collection

Figure 4.2.5 Revenues - Private commercial radio stations



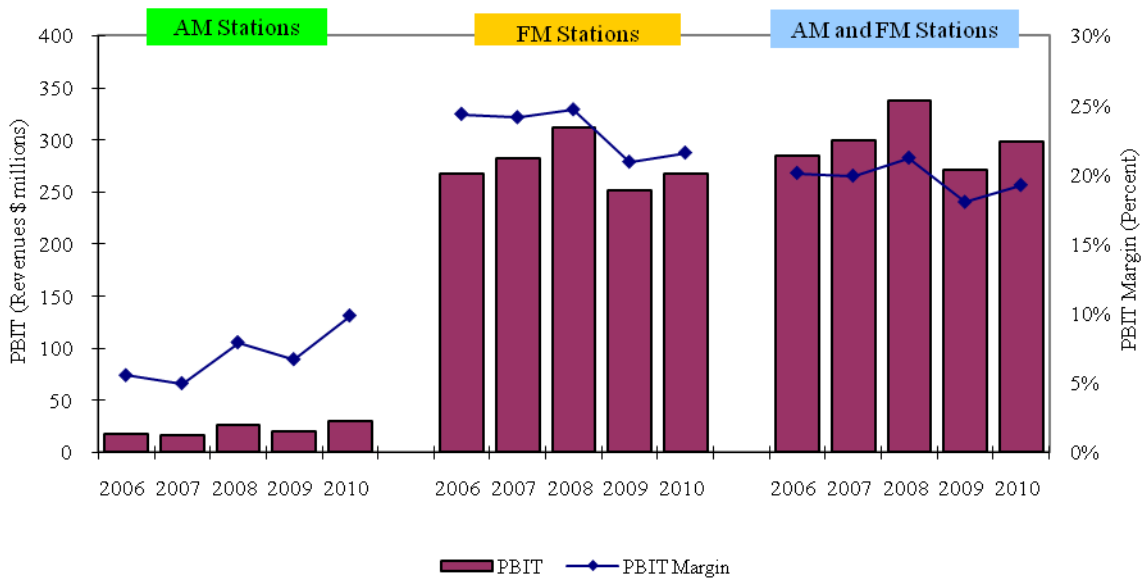
- Includes network results. Excludes pay and specialty audio programming services as well as multi-channel subscription radio services.
 - 2006 to 2009 figures have been updated to reflect current August aggregate results.
- Source: CRTC data collection

Figure 4.2.6 Average annual revenues and PBIT per station – Private commercial radio stations



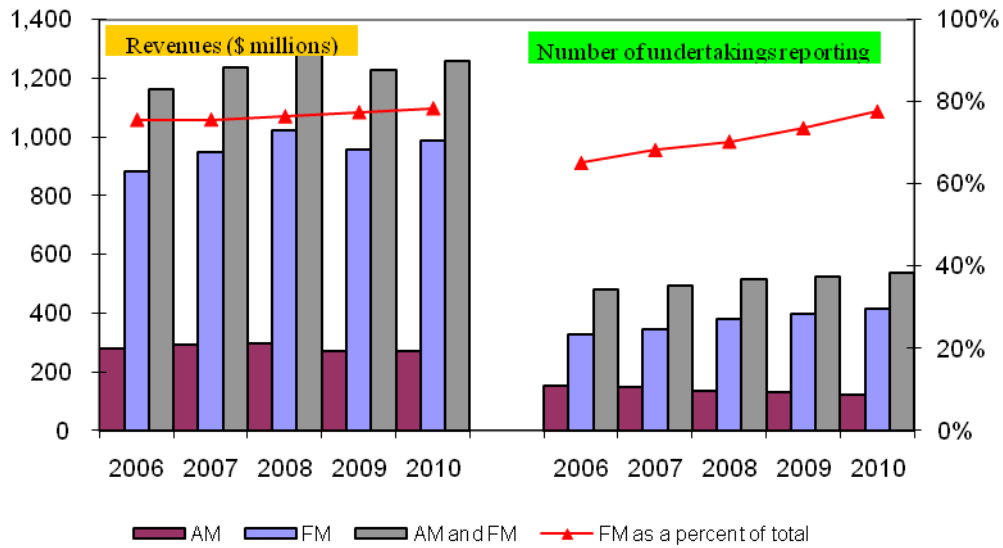
- Includes network results. Excludes pay and specialty audio programming services as well as multi-channel subscription radio services.
 - 2006 to 2009 figures have been updated to reflect current August aggregate results.
- Source: CRTC data collection

Figure 4.2.7 PBIT and PBIT margin - Private commercial radio stations



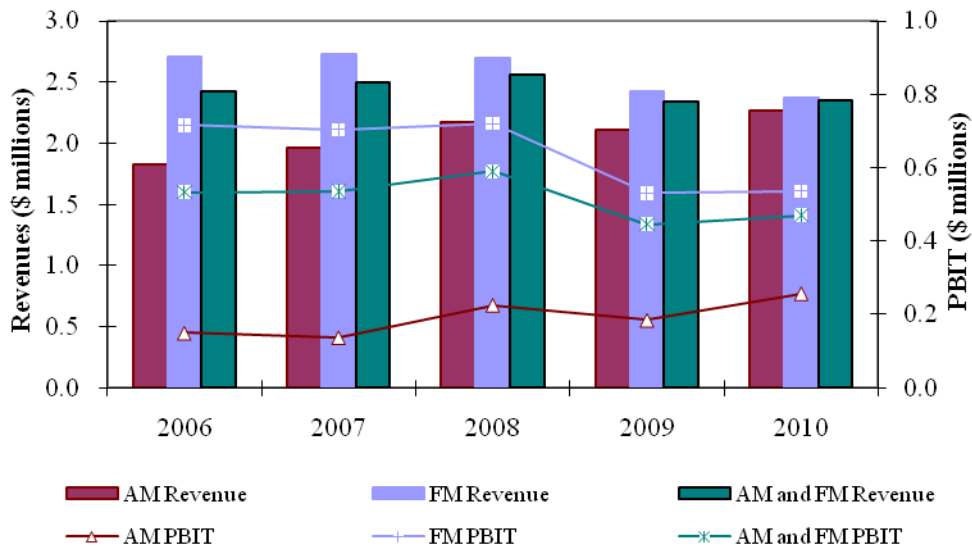
- Includes network results. Excludes pay and specialty audio programming services as well as multi-channel subscription radio services.
 - 2006 to 2009 figures have been updated to reflect current August aggregate results.
- Source: CRTC data collection

Figure 4.2.8 Revenues – English-language private commercial radio stations



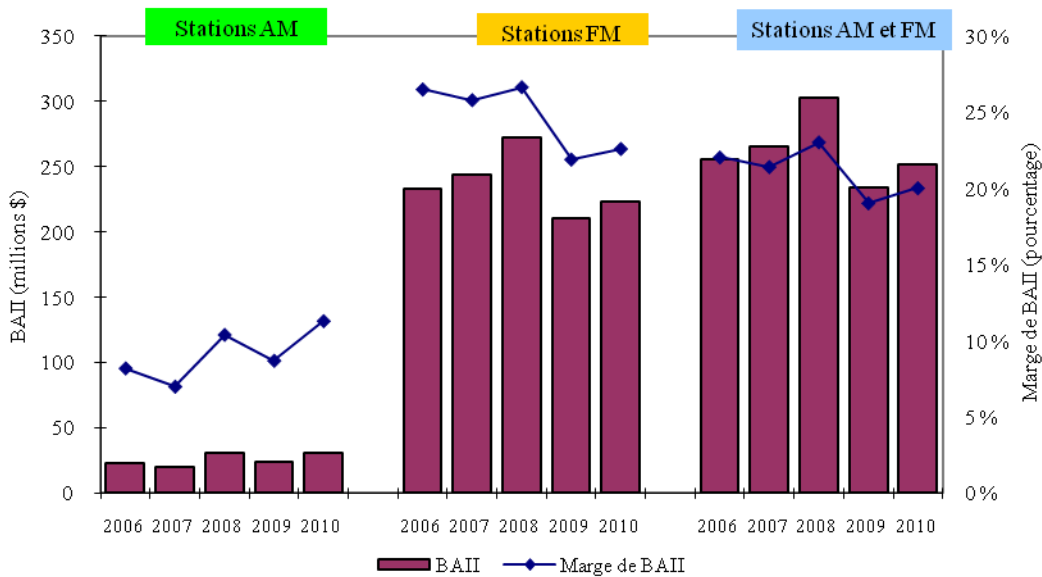
- Includes network results. Excludes pay and specialty audio programming services as well as multi-channel subscription radio services.
 - 2006 to 2009 figures have been updated to reflect current August aggregate results.
- Source: CRTC data collection

Figure 4.2.9 Average annual revenues and PBIT per station – English-language private commercial radio stations



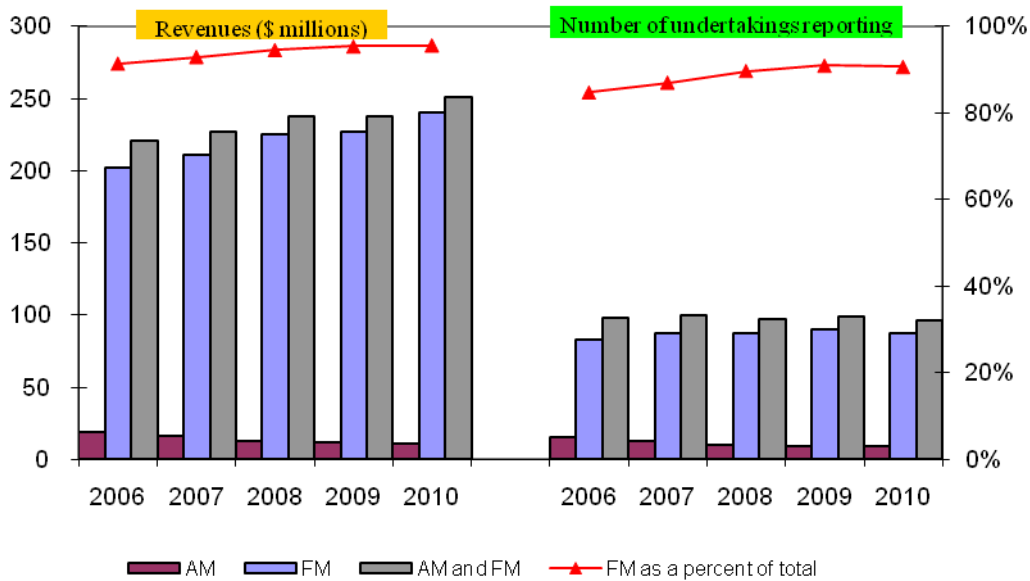
- Includes network results. Excludes pay and specialty audio programming services as well as multi-channel subscription radio services.
 - 2006 to 2009 figures have been updated to reflect current August aggregate results.
- Source: CRTC data collection

Figure 4.2.10 PBIT and PBIT margin – English-language private commercial radio stations



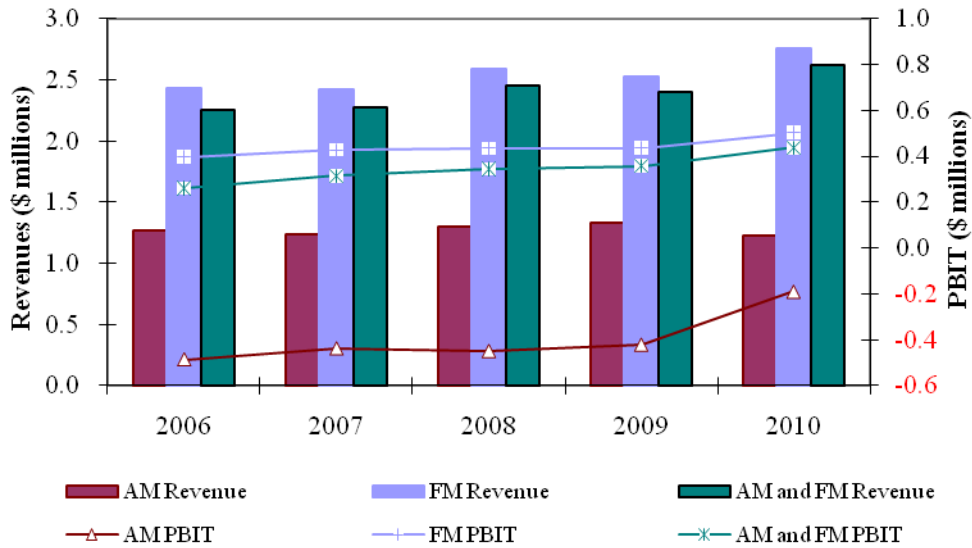
- Includes network results. Excludes pay and specialty audio programming services as well as multi-channel subscription radio services.
 - 2006 to 2009 figures have been updated to reflect current August aggregate results.
- Source: CRTC data collection

Figure 4.2.11 Revenues – French-language private commercial radio stations



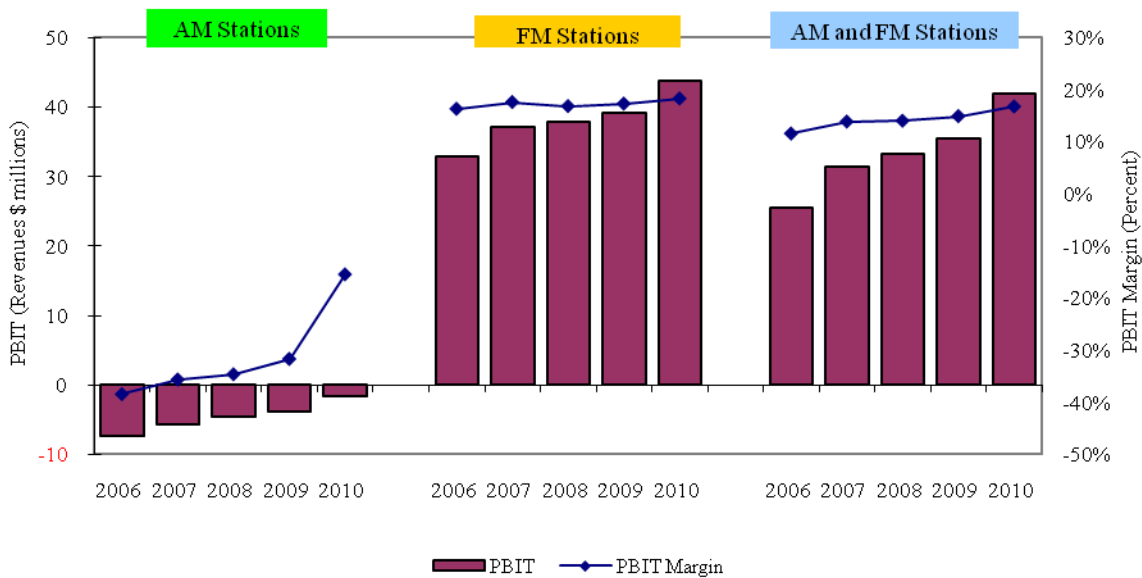
- Includes network results. Excludes pay and specialty audio programming services as well as multi-channel subscription radio services.
 - 2006 to 2009 figures have been updated to reflect current August aggregate results.
- Source: CRTC data collection

Figure 4.2.12 Average annual revenues and PBIT per station – French-language private commercial radio stations



(a) Includes network results. Excludes pay and specialty audio programming services as well as multi-channel subscription radio services.
 (b) 2006 to 2009 figures have been updated to reflect current August aggregate results.
 Source: CRTC data collection

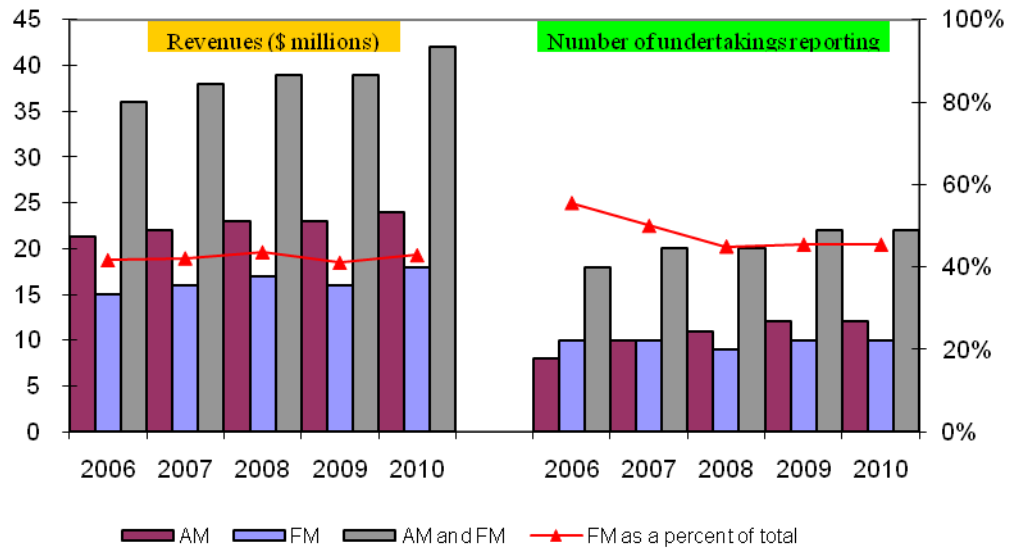
Figure 4.2.13 PBIT and PBIT margin – French-language private commercial radio stations



- Includes network results. Excludes pay and specialty audio programming services as well as multi-channel subscription radio services.
- 2006 to 2009 figures have been updated to reflect current August aggregate results.

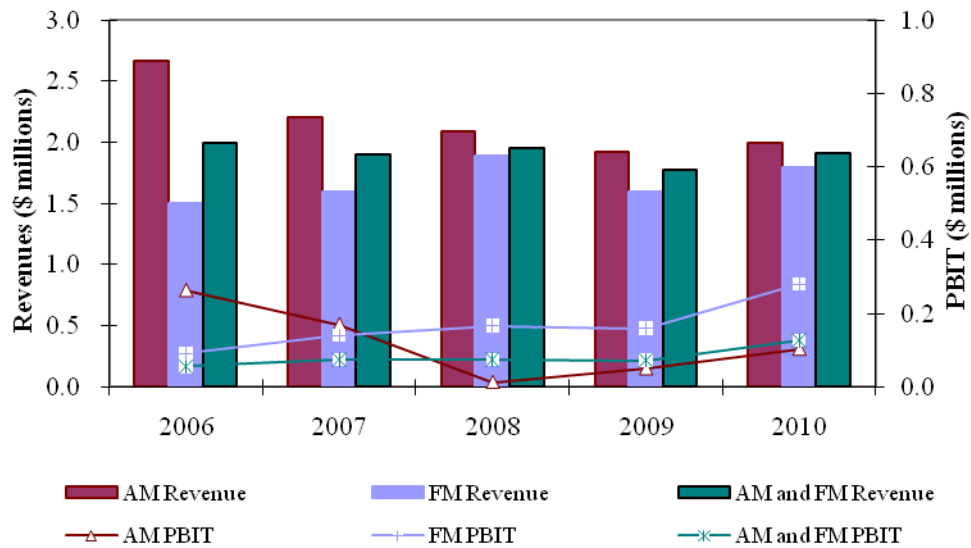
Source: CRTC data collection

Figure 4.2.14 Revenues – Ethnic private commercial radio stations



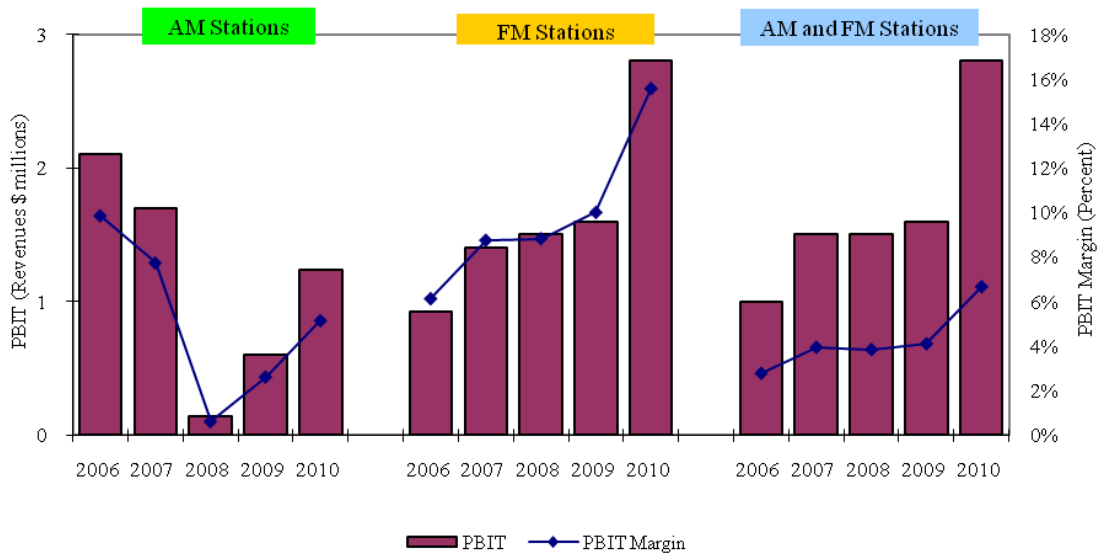
- Includes network results. Excludes pay and specialty audio programming services as well as multi-channel subscription radio services.
 - 2006 to 2009 figures have been updated to reflect current August aggregate results.
- Source: CRTC data collection

Figure 4.2.15 Average annual revenues and PBIT per station – Ethnic private commercial radio stations



- Includes network results. Excludes pay and specialty audio programming services as well as multi-channel subscription radio services.
 - 2006 to 2009 figures have been updated to reflect current August aggregate results.
- Source: CRTC data collection

Figure 4.2.16 PBIT and PBIT margin – Ethnic private commercial radio stations



- Includes network results. Excludes pay and specialty audio programming services as well as multi-channel subscription radio services.
 - 2006 to 2009 figures have been updated to reflect current August aggregate results.
- Source: CRTC data collection

Table 4.2.9 English-language, and French-language radio revenues and number of undertakings reporting for the largest radio operators in Canada

Corporation	Revenues (\$ thousands)			Number of radio undertakings reporting			Share of national revenue		
	2008	2009	2010	2008	2009	2010	2008	2009	2010
Largest private radio operators									
Astral ¹	325,292	317,461	326,494	80	81	82	21%	21%	21%
Corus ²	266,363	240,580	248,052	53	52	52	17%	16%	16%
Rogers ³	241,667	212,492	204,351	50	53	52	15%	14%	13%
BCE ⁴	172,131	161,960	161,157	34	34	34	11%	11%	10%
Newcap ⁵	95,785	96,452	104,677	61	62	59	6%	6%	7%
Total largest private radio operators	1,101,238	1,028,945	1,044,731	278	282	279	70%	68%	67%
Total private radio operators	1,593,679	1,507,732	1,551,759	631	646	654	100%	100%	100%
Largest English-language radio operators									
Astral ¹	217,980	209,013	216,768	59	60	61	17%	17%	17%
Rogers ³	241,667	212,492	204,351	50	53	52	18%	17%	16%
Corus	217,245	190,134	192,575	41	40	40	17%	15%	15%
BCE ⁴	172,131	161,960	161,157	34	34	34	13%	13%	13%
Newcap ⁵	95,785	96,452	104,677	61	62	59	7%	8%	8%
Total English-language largest private radio operators	944,808	870,051	879,528	245	249	246	72%	71%	69%
Total English-language private radio operators	1,316,430	1,230,398	1,258,737	514	525	536	100%	100%	100%
Largest French-language radio corporations									
Astral	107,312	108,448	109,726	21	21	21	47%	45%	44%
Corus ²	49,118	50,446	55,478	12	12	12	21%	21%	22%
Cogeco	33,174	36,280	41,780	5	5	5	14%	15%	17%
Total French-language largest private radio operators	189,604	195,174	206,984	38	38	38	82%	82%	82%
Total French-language private radio operators	237,924	238,396	251,139	97	99	96	100%	100%	100%

- Total private radio operators includes private commercial networks and commercial ethnic radio stations.
- Total English- and French- language private radio operators include private commercial network radio revenues.
- 2008-2009 industry revenue figures have been updated to reflect current August aggregate results.
- The following notes apply to Tables 4.2.6 – 4.2.7 and 4.2.9:
 - The ownership structure reflects transactions authorized by the Commission during the broadcast year, not the closing date of the transaction.
 - An undertaking's entire annual revenue is attributed to the corporation that was deemed to be its owner as of 31 August. Excludes exempted undertakings.
 1. Astral's 2010 results reflect the launch of CJOT-FM Ottawa.
 2. Corus's 2008 results reflect the sale of CHRC Québec to 9183-9084 Québec Inc., as approved in Broadcasting Decision 2008-128.
 3. Rogers' 2008 results reflect the transaction that was approved pursuant to Broadcasting Decision 2007-434. Rogers' 2008 results also reflect the transaction that was approved pursuant to Exchange of radio assets between Rogers (CICX-FM Orillia) and Larche Communications Inc. (CIKZ-FM Kitchener), Broadcasting Decision CRTC 2007-434.
 4. Following a change in effective control, CTVglobemedia's properties are now controlled by BCE (Broadcasting Decision 2011-163). CTV globemedia's 2008 results reflect the acquisition of the assets of the radio programming undertaking CFBT-FM Vancouver from Beat Broadcasting Corporation, Broadcasting Decision CRTC 2007-368.
 5. Newcap's 2008 results reflect the launch of CHFT-AM Fort McMurray, CILB-FM Lac La Biche, CIJK-FM Kentville and CHRK-FM Sydney. Also, Newcap's 2008 results reflect the change in the effective control as of 29 May 2008 of CKUL-FM Halifax, Nova Scotia, as approved in Broadcasting Public Notice 2008-77. Newcap's 2010 results reflect the sale of CKTG-FM and CJUK-FM Thunder Bay to Northwoods Broadcasting Limited, as approved in Broadcasting Decision 2009-746.

Source: CRTC data collection

Table 4.2.10 Revenues for Type B Native, community, and campus radio stations

	2006	2007	2008	2009	2010
Native Type B radio stations					
Number of radio undertakings reporting	27	28	13	25	24
Revenues (\$ thousands)					
Advertising	3,166	4,070	240	927	2,642
Other ¹	12,409	11,766	4,469	9,450	7,736
Total revenues	15,575	15,836	4,709	10,376	13,589
Other as a percent of total revenues	79.6%	74.3%	94.9%	91.1%	56.9%
PBIT margin	11.4%	6.4%	14.4%	19.0%	10.0%
Community radio stations					
Number of radio undertakings reporting	78	85	79	77	79
Revenues (\$ thousands)					
Advertising	10,751	11,038	11,023	11,525	12,079
Other ²	9,950	9,817	11,794	10,838	8,548
Total revenues	20,701	20,856	22,931	22,494	24,480
Other as a percent of total revenues	48.1%	47.1%	51.4%	48.2%	34.9%
PBIT margin	6.5%	3.3%	7.7%	6.9%	8.1%
Campus radio stations					
Number of radio undertakings reporting	44	41	40	43	42
Revenues (\$ thousands)					
Advertising	1,233	1,366	1,231	638	1,184
Other ³	6,308	6,472	6,987	6,028	6,595
Total revenues	7,541	7,838	8,128	6,666	8,049
Other as a percent of total revenues	83.7%	82.6%	84.9%	90.4%	81.9%
PBIT margin	3.6%	4.6%	6.2%	9.3%	10.0%

• The 2008 and 2009 figures have been updated to reflect current August aggregate results.

1. Native Type B 'other' revenues include government and band council grants and contributions from other sources

2. Community radio 'other' revenues include fundraising, grants and other sources

3. Campus radio 'other' revenues include fees, fundraising and grants

Source: CRTC financial database

Table 4.2.11 Value of radio transactions and corresponding tangible benefits for the period 1 April 2005 to 31 December 2010

RADIO Tangible Benefits (\$ millions)	English-language services			French-language services			Total benefits
	# of Trans.	Value of the transactions ¹	Benefits	# of Trans.	Value of the transactions ¹	Benefits	
1 Apr. 05 to 31 Mar. 06	12	24	1.3	2	-	-	1.3
1 Apr. 06 to 31 Dec. 06	5	68	4.1	2	-	-	4.1
1 Jan. 07 to 31 Dec. 07 ²	13	1,675	88.9	6	4	11.8	100.8
1 Jan. 08 to 31 Dec. 08	9	59.5	3.5	3	1.5	.05	3.6
1 Jan. 09 to 31 Dec. 09	10	27.5	1.6	1	-	-	1.6
1 Jan. 10 to 31 Dec. 10 ³	7	67.2	4	2	97.7	8.8	12.8
Total	56	1921.2	103.4	16	103.2	20.7	124.1

• Minor variances are due to rounding.

1. Value determined by the Commission for the purpose of calculating tangible benefits.

2. Total tangible benefits relating to the Astral/Standard (Broadcasting Decision 2007-359) and CTVglobemedia/CHUM (Broadcasting Decision 2007-165) radio ownership transactions totalled \$95.3 million. Of this amount, \$11.6 million is to be directed to the support of French-language CCD initiatives.

3. Total tangible benefits relating to the Corus/Cogeco (Broadcasting Decision 2010-942) radio ownership transactions totalled \$8.8 million.

Source: CRTC Decisions and Administrative approvals

Table 4.2.12 Summary of annual CCD contributions reported by radio licensees (\$ thousands)

RADIO - CCD	2005-06	2006-07	2007-08	2008-09	2009-10	% annual increase / decrease			
						07/06	08/07	09/08	10/09
i) CCD contributions by new stations during the first licence term									
FACTOR	1,552	1,266	983	1,582	2,014	-18%	-22%	61%	27%
MUSICACTION	191	238	306	697	552	25%	28%	128%	-21%
Music Industry Associations ¹	-	-	-	-	2,150	-	-	-	-
Local Music Initiatives ¹	-	-	-	-	7,120	-	-	-	-
New Spoken Word Content ¹	-	-	-	-	420	-	-	-	-
Music organizations ¹	2,733	586	2,886	5,187	n.a.	-79%	393%	80%	n.a.
Performing arts groups ¹	2,840	3,426	3,126	8,957	n.a.	21%	-9%	186%	n.a.
Schools and educational institutions ¹	678	596	614	899	1,179	-12%	3%	46%	31%
StarMaker Fund/Fonds Radio Star	435	1,019	0	220	1,077	134%			389%
Other eligible CCD initiatives	572	1,324	696	1,994	7,550	132%	-47%	186%	279%
Total	9,001	8,457	8,611	19,537	22,061	-6%	2%	127%	13%
ii) CCD contributions reported by radio licensees in the context of licence renewals									
FACTOR	749	946	1,243	2,999	2,003	26%	31%	141%	-33%
MUSICACTION	337	343	302	1,390	1,324	2%	-12%	360%	-5%
Music Industry Associations ¹	-	-	-	-	647	-	-	-	-
Local Music Initiatives ¹	-	-	-	-	1,809	-	-	-	-
New Spoken Word Content ¹	-	-	-	-	188	-	-	-	-
Music organizations ¹	461	588	2,023	3,081	n.a.	27%	244%	52%	n.a.
Performing arts groups ¹	753	1,068	1,264	1,850	n.a.	42%	18%	46%	n.a.
Schools and educational institutions ¹	154	279	357	618	422	80%	28%	73%	-32%
StarMaker Fund/Fonds Radio Star	2	23	0	0	0	nm			
Other eligible CCD initiatives	72	141	349	1,107	876	95%	148%	217%	-21%
Total	2,528	3,387	5,538	11,045	7,269	34%	64%	99%	-34%
iii) CCD contributions relating to changes in ownership and/or control									
FACTOR	3,132	2,580	4,023	5,711	5,179	-18%	56%	42%	-9%
MUSICACTION	1,125	1,464	1,033	992	344	30%	-29%	-4%	-65%
Music Industry Associations ¹	-	-	-	-	440	-	-	-	-
Local Music Initiatives ¹	-	-	-	-	1,705	-	-	-	-
New Spoken Word Content ¹	-	-	-	-	0	-	-	-	-
Music organizations ¹	543	436	2	65	n.a.	-20%	-100%	3,382%	n.a.
Performing arts groups ¹	795	529	490	2,466	n.a.	-33%	-7%	404%	n.a.
Schools and educational institutions ¹	166	354	114	379	274	114%	-68%	233%	-28%
StarMaker Fund/Fonds Radio Star	6,400	5,975	8,093	10,508	8,167	-7%	35%	30%	-22%
Other eligible CCD initiatives	329	354	0	394	613	8%			55%
Total	12,489	11,692	13,755	20,515	16,722	-6%	18%	49%	-18%
Total annual CCD contributions	24,017	23,536	27,904	51,097	46,053	-2%	19%	83%	-10%

- Contributions are based on annual disbursements reported by licensees for the period 1 September to 31 August
 - Contributions made under both the CTD and CCD regimes are included in these results.
 - Minor variances are due to rounding.
 - 2009 and 2010 figures include contributions by satellite radio.
1. The CCD categories collected were amended for the 2009-2010 annual return to more accurately reflect Broadcasting Public Notice CRTC 2006-158. 3 new categories (Music Industry Associations, Local Music Initiatives & New Spoken Word Content) were added, 1 category (Schools and educational institutions) was slightly amended from the previous category of School or scholarships and 2 categories were no longer collected (Music Organizations & Performing Arts Groups). The expenditures that were collected in the 2 eliminated categories are now captured within the 3 new expenditure categories.

Source: CRTC data collection

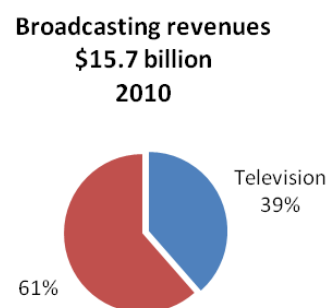
4.3 Television market sector

Overview

The television broadcasting industry delivers over 700 television services to Canadians. The industry includes a number of large ownership groups representing over 92% of television revenues from private conventional television stations and pay, PPV, VOD, and specialty services.

The English-language private conventional television sector includes three major ownership groups: BCE (CTV & A Channel) with a revenue share of 47%, Shaw (Global) with 33%, and Rogers (Citytv & Omni) with 14%. French-language private conventional television has two major players: Quebecor (TVA) with a revenue share of 65%, and Remstar (V) with 18%.

The industry also includes a national public broadcaster (the CBC) operating in both the English- and French-language markets and a number of provincial public broadcasters.



Television sector at a glance

	2009	2010	% Growth
Number of television services authorized to broadcast in Canada	699 #	716	2.4
English-language	454 #	469	3.3
French-language	111	116	4.5
Third-language	134	131	2.2
Revenues (\$ millions)	5,475	6,054	10.6
Private conventional television stations	1,971	2,147	8.9
Pay, PPV, VOD and specialty services	3,113 #	3,457	11.1
CBC conventional	392	450	14.8
PBIT (\$ millions)			
Private conventional television stations	-116.4	11.4	109.8
Pay, PPV, VOD and specialty services	728.7	877.3	20.4
Average weekly viewing hours for all persons, aged 2+	26.5 #	28	n/a
Average weekly viewing percentage (%) of Canadian programs			
Canadian English-language services (excluding Quebec Francophone market)	44.8 #	43.0	
Canadian French-language services (Quebec Francophone market)	67.7 #	64.5	
Canadian programming expenditures (\$ millions)	2,429	2,527	4.0
Canadian programming expenditures (% of total)			
CBC/SRC (conventional)	27.1	26.0	
Conventional private television	24.7	25.40	
Pay, PPV, VOD and specialty	44.3	45.9	
Other public and not-for-profit conventional TV	4.0	2.7	

Statistical Information – Television market sector
Table 4.3.1 Number and type of television services authorized to broadcast in Canada

	English Language		French Language		Third language		All Languages	
	2009	2010	2009	2010	2009	2010	2009	2010
Canadian conventional OTA¹								
National public broadcaster (CBC)								
Owned and operated	15	15	11	11			26	26
Transitional digital ²	4	1	3	1			7	2
Private commercial ³	65	63	20	20	6	6	91	89
Religious ⁴	7	8					7	8
Educational	4	4	3	3			7	7
Aboriginal	5	5					5	5
Transitional digital ²	11	8	3	2	3	0	17	11
Canadian specialty, PPV and VOD								
Analog specialty services	30	30	14	14	5	5	49	49
Digital Category 1 specialty services	15	16	3	3			18	19
Digital Category 2 specialty services ⁵	55	73	3	10	28	25	86	108
Pay television services ⁶	8	8	2	2	6	6	16	16
PPV services (DTH and terrestrial)	10	10	1	1			11	11
VOD services ⁷	32	32	1	1			33	33
Other Canadian services								
Community channels ⁸	84	85	35	35			119	120
Community program services	11	11	2	2			13	13
House of Commons - CPAC	1	1	1	1			2	2
Non-Canadian services⁹								
Non-Canadian satellite services authorized for distribution in Canada	97	99	9	9	86	89	192	197
Total number of television services	454	469	111	116	134	131	699	716

- Excludes RDUs, re-broadcasters, exempt television services and those specialty services where the authority has expired. Also, excludes some network licences. However, English-language includes bilingual (English and French) and Native services.

1. Includes satellite to cable services.
2. Number of OTA transitional digital television approved, but not necessarily in operation. This information is likely to change due to broadcasters launching digital television stations in preparation for the August 2011 deadline (Broadcasting Regulatory Policy CRTC 2010-167).
3. Excludes private commercial religious stations.
4. Includes 5 private commercial OTA television stations.
5. Includes only digital Category 2 specialty services that have been launched as of 31 December 2010.
6. Includes only pay services that have been launched as of 31 December 2010.
7. Number of services approved but not necessarily in operation.
8. Number of channels reported by BDU licensees as of 31 August. Excludes class 2 and 3 BDUs.
9. Carriage of authorized services is at the discretion of the BDU. Refer to Appendix 2 of Broadcasting Regulatory Policy 2011-43 for a complete listing of eligible services approved to the end of 31 December 2010.

Source: CRTC internal database

Table 4.3.2 National average weekly viewing hours, by age group

	2007-08	2008-09	2009-10 ¹
All persons 2+	26.6	26.5	28.0
<i>Annual growth</i>	-0.7%	-0.4%	<i>n/a</i>
Children 2-11	18.2	17.2	22.4
<i>Annual growth</i>	0.6%	-5.5%	<i>n/a</i>
Teens 12-17	17.4	16.6	23.0
<i>Annual growth</i>	-5.9%	-4.6%	<i>n/a</i>
18+	28.8	28.8	29.2
<i>Annual growth</i>	-1.4%	0.0%	<i>n/a</i>
18-34	21.1	20.6	23.5
<i>Annual growth</i>	-0.5%	-2.4%	<i>n/a</i>
18-49	24.0	23.5	24.3
<i>Annual growth</i>	0.0%	-2.1%	<i>n/a</i>
25-54	26.5	26.1	25.1
<i>Annual growth</i>	0.0%	-1.5%	<i>n/a</i>

- Television seasons:
 - 27 August 2007 to 31 August 2008, all persons 2+, Monday to Sunday, 6 a.m. to 6 a.m.;
 - 1 September 2008 to 30 August 2009, all persons 2+, Monday to Sunday, 2 a.m. to 2 a.m.
 - 31 August 2009 to 29 August 2010, all persons 2+, Monday to Sunday, 2 a.m. to 2 a.m.
 - 1. The data for Broadcast year 2009-2010, for the first time, is based on the national PPM panel as Anglo Canada switched to PPM technology on August 31, 2009. Previously the measurement technology for Anglo Canada was Mark II meters (set-top). Some fluctuations in the data may be attributed to this change in methodology.
- Source: BBM Nielsen/BBM Canada (2007-08 & 2008-09)
 BBM Canada PPM Data (2009-10)

Table 4.3.3 Viewing share of Canadian and non-Canadian services, by language and type of service – All Canada, excluding the Quebec Francophone market - 2006/2007 – 2009/2010 television seasons (Part 1 of 2)

Viewing share (%)	2006-2007	2007-2008	2008-2009	2009-2010 ¹
Canadian services				
English-language				
CBC	5.0	5.4	4.9	6.3
Private conventional	25.6	23.9	22.2	26.6
Specialty	28.4	28.4	29.3	36.9
Pay	4.8	5.3	5.1	6.5
Digital pay and specialty	3.4	4.2	4.6	5.9
Other services ²	2.7	2.6	2.4	2.3
Total English-language	69.6	69.8	68.6	84.5
<i>Percent growth</i>	-2%	0%	-2%	<i>n.a.</i>
French-language				
SRC	0.7	0.6	0.5	0.1
Private conventional	0.6	0.6	0.5	0.2
Télé-Québec	0.0	0.1	0.0	0.0
Other services ³	0.0	0.1	0.0	0.0
Specialty	0.7	0.6	0.6	0.4
Pay	0.1	0.0	0.0	0.0
Digital pay and specialty	0.0	0.0	0.0	0.0
Total French-language	2.2	2.0	1.7	0.8
<i>Percent growth</i>	29%	-9%	-15%	<i>n.a.</i>
Other languages				
Private conventional	1.2	1.4	1.4	1.3
Specialty	0.3	0.4	0.4	1.0
Digital	0.1	0.1	0.1	0.0
APTN	0.2	0.2	0.1	0.2
Total other languages	1.7	1.9	1.9	2.4
<i>Percent Growth</i>	6%	12%	0%	<i>n.a.</i>
Community services	0.9	1.0	1.1	0.2
VOD/PPV	0.4	0.5	0.8	0.0
Total Canadian services	74.9	75.3	73.9	87.9
<i>Percent Growth</i>	-1%	1%	-2%	<i>n.a.</i>

Table 4.3.3 Viewing share of Canadian and non-Canadian services by language and type of service – All Canada, excluding the Quebec Francophone market - 2006/2007 – 2009/2010 television seasons (Part 2 of 2)

Viewing share (%)	2006-2007	2007-2008	2008-2009	2009-2010 ¹
Non-Canadian services				
U.S. conventional	12.8	11.8	10.9	4.7
U.S. specialty	9.7	9.4	9.7	7.3
International	0.1	0.2	0.3	0.0
Total non-Canadian services	22.6	21.4	21.0	12.1
<i>Percent growth</i>	2%	-5%	-2%	n/a
Miscellaneous	2.7	3.5	5.1	0.0
<i>Percent growth</i>	35%	30%	46%	n/a
Total viewing share	100	100	100	100
Total hours (millions)	659.2	644.2	650.1	709.3
<i>Percent growth</i>	1%	-2%	1%	n/a

- Television seasons:
 - 28 August 2006 to 26 August 2007, includes all persons 2+, Monday to Sunday, 6 a.m. to 6 a.m.;
 - 27 August 2007 to 31 August 2008, includes all persons 2+, Monday to Sunday, 6 a.m. to 6 a.m.;
 - 1 September 2008 to 30 August 2009, includes all persons 2+, Monday to Sunday, 2 a.m. to 2 a.m.; and
 - 31 August 2009 to 29 August 2010, includes all persons 2+, Monday to Sunday, 2 a.m. to 2 a.m.
- Minor variances are due to rounding.

1. The data for Broadcast year 2009-2010, for the first time, is based on the national PPM panel as Anglo Canada switched to PPM (portable people meter) technology on August 31, 2009. Previously the measurement technology for Anglo Canada was Mark II meters (set-top). Some fluctuations in the data may be attributed to this change in methodology.
2. Canadian, English-language other services includes Access, Knowledge, SCN, TVO, CTS, and CJIL
3. Canadian, French-language other services includes TFO

Source: BBM Nielsen (2006-07, 2007-08, 2008-09)
 BBM Canada (PPM data, 2009-10)

Table 4.3.4 Viewing share of Canadian and non-Canadian services, by language and type of service in the Quebec Francophone market 2006/2007 – 2009/2010 television seasons

Viewing share (%)	2006-2007	2007-2008	2008-2009	2009-2010	Change 2006/2007-2009-2010
Canadian services					
French-language					
SRC	12.8	13.8	13.4	12.5	-0.3
Private conventional	37.8	35.6	33.8	32.9	-4.9
Télé-Québec	3.1	3.5	3.6	3.2	0.1
Other services ¹	0.2	0.2	0.1	0.0	-0.2
Specialty	34.0	34.4	36.1	36.1	2.1
Pay	4.5	4.5	3.8	4.1	-0.4
Digital pay and specialty	1.3	2.0	2.2	3.2	1.9
Total French-language	93.6	93.9	93.0	92.0	-1.6
<i>Percent growth</i>	<i>1%</i>	<i>0%</i>	<i>-1%</i>	<i>-1%</i>	
English-language					
CBC	0.5	0.5	0.6	0.6	0.1
Private conventional	2.0	1.7	1.8	1.9	-0.1
Specialty	1.7	1.9	2.3	2.4	0.7
Pay	0.0	0.0	0.3	0.4	0.4
Digital pay and specialty	0.0	0.0	0.2	0.6	0.6
Total English-language	4.2	4.2	5.2	6.0	1.8
<i>Percent growth</i>	<i>-9%</i>	<i>0%</i>	<i>24%</i>	<i>15%</i>	
Other – languages					
Private conventional	0.3	0.1	0.1	0.1	-0.2
Specialty	0.0	0.1	0.0	0.0	0.0
Digital	0.0	0.0	0.0	0.0	0.0
APTN	0.0	0.0	0.1	0.1	0.1
Total other language	0.3	0.2	0.2	0.2	-0.1
Community services	0.3	0.2	0.2	0.2	-0.1
VOD/PPV	0.0	0.0	0.0	0.0	0.0
Total Canadian services	98.5	98.5	98.5	98.4	-0.1
<i>Percent growth</i>	<i>0%</i>	<i>0%</i>	<i>0%</i>	<i>0%</i>	
Non-Canadian services					
US conventional	0.8	0.8	0.8	1.0	0.2
US specialty	0.8	0.6	0.6	0.6	-0.2
International	0.0	0.0	0.0	0.0	0.0
Total non-Canadian services	1.6	1.4	1.5	1.6	0.0
<i>Percent growth</i>	<i>-16%</i>	<i>-13%</i>	<i>7%</i>	<i>7%</i>	
Miscellaneous	0.0	0.1	0.0	0.0	0.0
Total viewing share	100	100	100	100	
Total hours (millions)	191.2	202.6	205.7	217.9	26.7
<i>Percent growth</i>	<i>1%</i>	<i>6%</i>	<i>2%</i>	<i>6%</i>	

- Television seasons:
 - 28 August 2006 to 26 August 2007, includes all persons 2+, Monday to Sunday, 6 a.m. to 6 a.m.;
 - 27 August 2007 to 31 August 2008, includes all persons 2+, Monday to Sunday, 6 a.m. to 6 a.m.;
 - 1 September 2008 to 30 August 2009, includes all persons 2+, Monday to Sunday, 2 a.m. to 2 a.m.; and
 - 31 August 2009 to 29 August 2010, includes all persons 2+, Monday to Sunday, 2 a.m. to 2 a.m.
- Minor variances are due to rounding.

1. Canadian French-language other services includes TFO

Source: BBM Canada

Table 4.3.5 Average weekly viewing hours of Canadian programs distributed by Canadian English- and French-language television services, by program origin, genre, and region

Viewing hours (millions)	English-language services				French-language services			
	All of Canada excluding Quebec Francophone market				Quebec Francophone market			
	2006-2007	2007-2008	2008-2009	2009-2010 ¹	2006-2007	2007-2008	2008-2009	2009-2010
News and analysis and interpretation	61.8	59.8	65.4	80.9	38.7	38.7	68.7	49.9
<i>% Canadian</i>	95.7%	95.2%	95.0%	95.5%	99.0%	99.0%	99.5%	99.3%
<i>% of total</i>	15.3%	15.1%	17.2%	14.3%	22.9%	21.8%	32.8%	24.6%
Long-form documentary	21.9	22.8	21.3	30.0	9.3	9.9	10.9	12.4
<i>% Canadian</i>	53.9%	52.0%	51.1%	41.1%	53.2%	49.4%	48.8%	48.2%
<i>% of total</i>	5.4%	5.8%	5.6%	5.3%	5.5%	5.5%	5.2%	6.1%
Sports	40.8	43.9	38.6	81.6	10.4	14.8	12.6	16.7
<i>% Canadian</i>	68.5%	72.4%	67.8%	76.2%	78.3%	84.5%	77.4%	85.6%
<i>% of total</i>	10.1%	11.1%	10.2%	14.4%	6.1%	8.3%	6.0%	8.2%
Drama and comedy	181.8	171.3	163.4	245.1	72.0	74.3	74.7	79.9
<i>% Canadian</i>	20.0%	20.4%	21.3%	19.2%	36.6%	32.5%	31.9%	32.7%
<i>% of total</i>	45.0%	43.3%	43.1%	43.2%	42.5%	41.7%	35.7%	39.4%
Music and dance and variety	10.8	10.2	9.3	12.0	5.1	4.1	5.1	3.5
<i>% Canadian</i>	53.6%	49.7%	48.0%	46.4%	91.7%	78.0%	81.8%	74.5%
<i>% of total</i>	2.7%	2.6%	2.4%	2.1%	3.0%	2.3%	2.4%	1.7%
Other	87.0	87.3	81.3	117.5	33.9	36.3	37.5	40.5
<i>% Canadian</i>	35.2%	34.8%	37.7%	33.8%	82.5%	85.3%	78.8%	80.0%
<i>% of total</i>	21.5%	22.1%	21.4%	20.7%	20.0%	20.4%	17.9%	20%
Total	404.1	395.3	379.3	567.1	169.4	178.1	209.5	202.9
<i>% Canadian</i>	42.5%	43.3%	44.8%	43.0%	65.2%	64.1%	67.7%	64.5%

- Based on Canadian services with available program level data that incorporates country of origin and program genre.
 - Television seasons:
 - 28 August 2006 to 26 August 2007, includes all persons 2+, Monday to Sunday, 6 a.m. to 6 a.m.;
 - 27 August 2007 to 31 August 2008, includes all persons 2+, Monday to Sunday, 6 a.m. to 6 a.m.;
 - 1 September 2008 to 30 August 2009, includes all persons 2+, Monday to Sunday, 2 a.m. to 2 a.m.; and
 - 31 August 2009 to 29 August 2010, includes all persons 2+, Monday to Sunday, 2 a.m. to 2 a.m.
 - English-language services include viewing of ethnic stations.
1. The data for Broadcast year 2009-10 is based on the national PPM panel as Anglo Canada switched to PPM (portable people meter) technology on August 31, 2009. Previously the measurement technology for Anglo Canada was Mark II meters (set-top). Some fluctuations in the data may be attributed to this change in methodology.
- Source: English-language services
- BBM Nielsen (2006-07, 2007-08, 2008-09)
 - BBM Canada (PPM Data) (2009-10)
- French-language services:
- BBM Canada

Table 4.3.6 Average weekly viewing hours of Canadian programs distributed by Canadian English- and French-language private conventional services by program origin, genre, and region

Viewing hours (millions)	English-language services All of Canada excluding Quebec Francophone market				French-language services Quebec Francophone market			
	2006- 2007	2007- 2008	2008- 2009	2009- 2010 ¹	2006- 2007	2007- 2008	2008- 2009	2009- 2010
News and analysis and interpretation	33.6	32.5	23.9	37.5	26.1	27.1	24.6	24.1
<i>% Canadian</i>	96.9%	97.0%	96.6%	98.3%	100.0%	100.0%	99.9%	100.0%
<i>% of total</i>	22.1%	23.2%	23.7%	20.5%	36.5%	37.9%	35.8%	34.0%
Long-form documentary	2.1	2.3	1.7	1.7	0.6	0.5	0.6	1.1
<i>% Canadian</i>	83.9%	65.9%	66.6%	71.3%	76.4%	86.5%	87.7%	90.7%
<i>% of total</i>	1.4%	1.6%	1.7%	0.9%	0.8%	0.8%	0.9%	1.6%
Sports	2.6	2.5	1.8	17.2	0.7	0.9	1.0	2.4
<i>% Canadian</i>	8.3%	2.8%	3.2%	78.1%	100.0%	100.0%	96.5%	95.2%
<i>% of total</i>	1.7%	1.8%	1.8%	9.4%	0.9%	1.3%	1.4%	3.3%
Drama and comedy	64.0	55.7	39.6	70.5	24.9	24.6	23.9	25.0
<i>% Canadian</i>	8.5%	11.0%	13.7%	11.0%	28.7%	27.9%	27.5%	28.2%
<i>% of total</i>	42.2%	39.7%	39.3%	38.7%	34.7%	34.5%	34.7%	35.3%
Music and dance and variety	4.9	4.4	4.3	5.9	1.4	1.0	2.8	1.2
<i>% Canadian</i>	20.6%	17.5%	17.9%	9.2%	97.9%	47.2%	79.2%	56.6%
<i>% of total</i>	3.2%	3.1%	4.2%	3.2%	2.0%	1.1%	4.0%	1.7%
Other	44.6	42.8	29.6	49.6	18.0	17.3	15.9	17.1
<i>% Canadian</i>	20.6%	19.9%	24.2%	22.6%	82.8%	88.0%	79.5%	84.3%
<i>% of total</i>	29.4%	30.6%	29.3%	27.2%	25.1%	24.2%	23.1%	24.1%
Total	151.9	140.0	100.9	182.4	71.6	71.4	68.8	71.0
<i>% Canadian</i>	33.1%	34.6%	37.3%	38.9%	70.7%	71.4%	69.2%	69.9%

- Based on Canadian services with available program level data that incorporates country of origin and program genre.
 - Television seasons:
 - 28 August 2006 to 26 August 2007, includes all persons 2+, Monday to Sunday, 6 a.m. to 6 a.m.;
 - 27 August 2007 to 31 August 2008, includes all persons 2+, Monday to Sunday, 6 a.m. to 6 a.m.;
 - 1 September 2008 to 30 August 2009, includes all persons 2+, Monday to Sunday, 2 a.m. to 2 a.m.; and
 - 31 August 2009 to 29 August 2010, includes all persons 2+, Monday to Sunday, 2 a.m. to 2 a.m.
 - English-language services include viewing of ethnic stations.
1. The data for Broadcast year 2009-10 is based on the national PPM panel as Anglo Canada switched to PPM (portable people meter) technology on August 31, 2009. Previously the measurement technology for Anglo Canada was Mark II meters (set-top). Some fluctuations in the data may be attributed to this change in methodology.

Source: English-language services

- BBM Nielsen (2006-07, 2007-08, 2008-09)
- BBM Canada (PPM Data) (2009-10)

French-language services:

- BBM Canada

Table 4.3.7 Average weekly viewing hours of Canadian programs distributed by Canadian English- and French-language CBC conventional services by program origin, genre, and region

Viewing hours (millions)	English-language services				French-language services			
	All of Canada excluding Quebec Francophone market				Quebec Francophone market			
	2006-2007	2007-2008	2008-2009	2009-2010 ¹	2006-2007	2007-2008	2008-2009	2009-2010
News and analysis and Interpretation	5.3	5.4	6.4	6.5	7.3	6.9	7.5	6.8
<i>% Canadian</i>	100.0%	100.0%	99.8%	100.0%	100.0%	100.0%	99.9%	100.0%
<i>% of total</i>	17.6%	15.5%	21.0%	15.1	30.0%	24.8%	27.2%	25.0%
Long-form documentary	1.3	1.4	1.4	1.5	0.5	0.4	0.5	0.4
<i>% Canadian</i>	85.6%	86.9%	93.9%	97.2%	87.5%	91.3%	93.2%	92.1%
<i>% of total</i>	4.2%	4.0%	4.6%	3.5%	1.9%	1.3%	1.9%	1.4%
Sports	10.8	15.2	7.8	16.3	0.2	2.4	0.7	1.0
<i>% Canadian</i>	99.9%	100.0%	100.0%	100.0%	100.0%	100.0%	92.6%	100.0%
<i>% of total</i>	35.9%	43.5%	25.5%	37.6%	0.8%	8.7%	2.5%	3.8%
Drama and comedy	10.7	10.2	9.2	11.4	8.8	9.2	9.1	8.9
<i>% Canadian</i>	31.3%	39.7%	44.9%	45.5%	62.7%	63.0%	62.0%	66.5%
<i>% of total</i>	35.3%	29.2%	30.1%	26.2%	36.1%	33.1%	33.1%	32.9%
Music and dance and variety	0.1	0.2	0.2	0.1	0.8	0.8	0.5	0.5
<i>% Canadian</i>	91.1%	89.3%	92.4%	84.1%	99.8%	99.7%	100.0%	100.0%
<i>% of total</i>	0.5%	0.7%	0.6%	0.2%	3.5%	2.8%	1.7%	1.8%
Other	2.0	2.5	5.6	7.5	6.8	8.2	9.2	9.5
<i>% Canadian</i>	94.9%	88.1%	41.8%	45.1%	99.6%	99.8%	100.0%	100.0%
<i>% of total</i>	6.6%	7.1%	18.3%	17.3%	27.8%	29.4%	33.6%	35.0%
Total	30.2	34.9	30.5	43.3	24.3	27.9	27.4	27.1
<i>% Canadian</i>	74.7%	80.9%	72.4%	76.1%	86.2%	87.6%	87.1%	88.8%

- Based on Canadian services with available program level data that incorporates country of origin and program genre.
 - Television seasons:
 - 28 August 2006 to 26 August 2007, includes all persons 2+, Monday to Sunday, 6 a.m. to 6 a.m.;
 - 27 August 2007 to 31 August 2008, includes all persons 2+, Monday to Sunday, 6 a.m. to 6 a.m.;
 - 1 September 2008 to 30 August 2009, includes all persons 2+, Monday to Sunday, 2 a.m. to 2 a.m.; and
 - 31 August 2009 to 29 August 2010, includes all persons 2+, Monday to Sunday, 2 a.m. to 2 a.m.
 - English-language services include viewing of ethnic stations.
1. The data for Broadcast year 2009-10 is based on the national PPM panel as Anglo Canada switched to PPM (portable people meter) technology on August 31, 2009. Previously the measurement technology for Anglo Canada was Mark II meters (set-top). Some fluctuations in the data may be attributed to this change in methodology.
- Source: English-language services
- BBM Nielsen (2006-07, 2007-08, 2008-09)
 - BBM Canada (PPM Data) (2009-10)
- French-language services:
- BBM Canada

Table 4.3.8 Average weekly viewing hours of Canadian programs distributed by Canadian English- and French-language pay and specialty services by program origin, genre, and region

Viewing hours (millions)	English-language services				French-language services			
	All of Canada excluding Quebec Francophone market			Quebec Francophone market				
	2006-2007	2007-2008	2008-2009	2009-2010 ¹	2006-2007	2007-2008	2008-2009	2009-2010
News and analysis and Interpretation	22.2	21.2	11.5	36.4	5.1	4.6	32.1	18.8
<i>% Canadian</i>	92.7%	91.3%	83.2%	92.2%	92.7%	92.0%	98.9%	98.1%
<i>% of total</i>	10.6%	10.2%	5.6%	10.9%	7.5%	6.4%	31.6%	19.1%
Long-form documentary	16.4	17.2	15.2	25.2	7.6	8.4	9.1	10.4
<i>% Canadian</i>	49.3%	48.5%	47.0%	36.0%	49.7%	45.7%	44.4%	42.8%
<i>% of total</i>	7.8%	8.3%	7.4%	7.6%	11.3%	11.7%	9.0%	10.6%
Sports	27.3	26.3	29.0	48.0	9.6	11.6	10.9	13.3
<i>% Canadian</i>	61.8%	63.0%	63.3%	67.5%	76.4%	79.5%	74.7%	82.8%
<i>% of total</i>	13.1%	12.6%	14.2%	14.5%	14.2%	16.1%	10.7%	13.6%
Drama and comedy	100.3	98.9	104.2	157.7	35.0	36.2	37.3	41.6
<i>% Canadian</i>	25.9%	23.7%	22.1%	20.7%	34.2%	25.0%	24.9%	26.2%
<i>% of total</i>	48.0%	47.5%	51.0%	47.4%	51.8%	50.3%	36.7%	42.5%
Music and dance and variety	5.7	5.5	4.4	6.0	2.6	2.1	1.5	1.6
<i>% Canadian</i>	80.6%	73.5%	78.4%	82.0%	85.0%	81.4%	77.4%	77.1%
<i>% of total</i>	2.7%	2.7%	2.2%	1.8%	3.9%	2.9%	1.5%	1.6%
Other	37.1	39.0	39.9	59.0	7.7	9.2	10.6	12.4
<i>% Canadian</i>	48.3%	46.1%	46.7%	41.2%	66.6%	68.0%	59.2%	58%
<i>% of total</i>	17.7%	18.7%	19.5%	17.8%	11.4%	12.7%	10.5%	12.6%
Total	209.1	208.2	204.3	332.3	67.5	72.0	101.6	98.0
<i>% Canadian</i>	45.0%	43.1%	39.5%	41.2%	52.0%	47.5%	60.0%	54.2%

- Based on Canadian services with available program level data that incorporates country of origin and program genre.
 - Television seasons:
 - 28 August 2006 to 26 August 2007, includes all persons 2+, Monday to Sunday, 6 a.m. to 6 a.m.;
 - 27 August 2007 to 31 August 2008, includes all persons 2+, Monday to Sunday, 6 a.m. to 6 a.m.;
 - 1 September 2008 to 30 August 2009, includes all persons 2+, Monday to Sunday, 2 a.m. to 2 a.m.; and
 - 31 August 2009 to 29 August 2010, includes all persons 2+, Monday to Sunday, 2 a.m. to 2 a.m.
 - English-language services include viewing of ethnic stations.
1. The data for Broadcast year 2009-10 is based on the national PPM panel as Anglo Canada switched to PPM (portable people meter) technology on August 31, 2009. Previously the measurement technology for Anglo Canada was Mark II meters (set-top). Some fluctuations in the data may be attributed to this change in methodology.
- Source: English-language services
- BBM Nielsen (2006-07, 2007-08, 2008-09)
 - BBM Canada (PPM Data) (2009-10)
- French-language services:
- BBM Canada

Table 4.3.9 Viewing share of Canadian services by ownership group in the English-language and French-language markets (Part 1 of 2)

Viewing share (%)	2007-2008			2008-2009			2009-2010		
	Conventional	Discretionary	Total	Conventional	Discretionary	Total	Conventional	Discretionary	Total
Canadian English-language market									
All of Canada, excluding the Quebec francophone market									
BCE ¹⁴	17.7	15.7	33.4	17.1	16.4	33.5	17.5	18.0	35.5
<i>English services</i>	17.7	15.6		17.1	16.2		17.5	17.7	
<i>French services</i>	-	0.1		-	0.2		-	0.2	
Shaw ^{13,15}	11.4	11.5	22.8	9.2	12.9	22.1	8.6	12.5	21.1
<i>English services</i>	11.4	11.5		9.2	12.9		8.6	12.5	
<i>French services</i>	-	-		-	-		-	-	
Corus ^{9,15,16}	0.3	9.6	10.0	0.4	9.5	10.0	0.4	10.4	10.8
<i>English services</i>	0.3	9.6		0.4	9.5		0.4	10.4	
<i>French services</i>	-	-		-	-		-	-	
Rogers ¹²	5.6	2.8	8.3	5.2	2.8	7.9	4.9	4.0	8.9
<i>English services</i>	5.6	2.8		5.2	2.8		4.9	4.0	
<i>French services</i>	-	-		-	-		-	-	
CBC ^{8,11}	7.7	1.9	9.5	6.8	2.0	8.8	7.1	1.4	8.5
<i>English services</i>	6.9	1.7		6.1	1.8		7.0	1.3	
<i>French services</i>	0.8	0.2		0.7	0.2		0.2	0.0	
Astral ^{15,16}	-	6.2	6.2	-	5.7	5.7	-	5.9	5.9
<i>English services</i>	-	5.9		-	5.4		-	5.8	
<i>French services</i>	-	0.3		-	0.3		-	0.1	
Other ^{15,16}	3.4	6.3	9.7	4.4	7.5	11.9	8.4	0.2	8.6
<i>English services</i>	2.5	6.0		3.7	7.3		2.6	0.0	
<i>French services</i>	1.0	0.3		0.7	0.3		5.8	0.1	
Total hours (millions)	213.8	249.5	463.4	199.5	262.9	462.4	254.2	353.6	607.8
Canadian French-language market									
Quebec francophone market									
Quebecor ¹⁵	25.6	4.1	29.7	26.3	4.7	31.0	23.8	5.8	29.6
<i>French services</i>	25.6	4.1		26.3	4.7		23.8	5.8	
<i>English services</i>	-	-		0.0	0.0		0.0	0.0	
Astral ^{15,16}	-	17.4	17.4	-	17.3	17.3	-	17.9	17.9
<i>French services</i>	-	17.4		-	17.0		-	17.6	
<i>English services</i>	-	-		-	0.3		-	0.3	
SRC ^{8,11}	14.4	3.3	17.7	14.0	4.6	18.6	13.4	4.1	17.5
<i>French services</i>	13.9	3.2		13.5	4.5		12.7	4.0	
<i>English services</i>	0.5	0.0		0.6	0.1		0.6	0.1	
BCE ¹⁴	1.0	7.2	8.2	1.1	7.0	8.1	1.2	7.7	8.9
<i>French services</i>	-	6.1		-	5.7		-	6.3	
<i>English services</i>	1.0	1.1		1.1	1.3		1.2	1.4	
Remstar ¹⁰	8.4	-	8.4	5.8	-	5.8	7.5	-	7.5
<i>French services</i>	8.4	-		5.8	-		7.5	-	
<i>English services</i>	-	-		-	-		-	-	
Other ^{15,16}	6.8	11.8	18.5	6.9	12.4	19.3	5.5	10.9	16.4
<i>French services</i>	6.0	10.9		6.1	11.1		5.4	10.6	
<i>English services</i>	0.8	0.8		0.8	1.3		0.1	0.3	
Total hours (millions)	111.7	86.8	198.5	109.5	92.5	202.0	111.5	102.4	214.0

Source: BBM Nielsen Media Research / BBM Canada (InfoSys PPM TV)

Table 4.3.9 Viewing share of Canadian services by ownership group in the English-language and French-language markets (Part 2 of 2)

Notes:

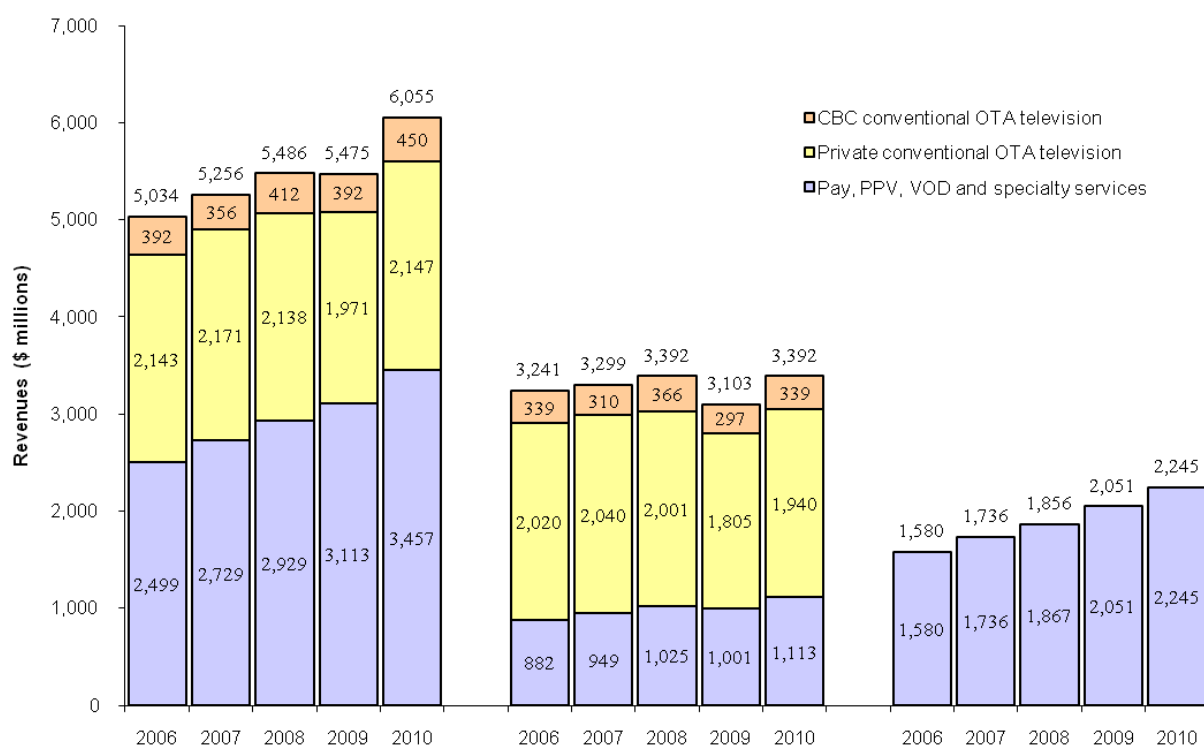
1. The data for Broadcast year 2009-2010, for the first time, is based on the national PPM (portable people meter) panel as Anglo Canada switched to PPM technology on August 31, 2009. Previously the measurement technology for Anglo Canada was Mark II meters (set-top). Some fluctuations in the data may be attributed to this change in methodology
2. Minor variances are due to rounding.
3. Television seasons: 2007-2008: 27 August 2007 to 31 August 2008; 2008-2009: 1 September 2008 to 30 August 2009; 2009-2010, 31 August 2009- 29 August 2010.
4. For 2007-2008, calculations are based on the total average weekly viewing hours to Canadian services, for all persons 2+, Monday to Sunday, 6 a.m. to 6 a.m. For 2008-2009 and 2009-2010, calculations are based on the total average viewing hours (excluding guests) to Canadian services, for all persons 2+, Monday to Sunday, 2 a.m. to 2 a.m.
5. Total viewing is based on viewing to all Canadian conventional stations (including ethnic stations) and Canadian discretionary services (specialty, pay, and the on-demand versions of same, excludes PPV services).
6. Canadian French-language market refers to the BBM Canada Québec francophone market. Canadian English-language market refers to the BBM Canada All Canada market minus the Québec francophone market.
7. With the exception of Shaw and BCE (see notes 13 and 14), ownership is based on the date of the approval decision, not the official closing date of the transaction. Viewing for the entire television season is attributed to the ownership group holding direct and indirect voting interests greater than 50% on the last day of each television season.
8. Stations owned and operated by the CBC/SRC.
9. Corus' totals do not include viewing to Teletatino. Corus' total for 2007-08 includes: the Oprah Winfrey Network (OWN, formerly Viva) following a change in effective control (Broadcasting Decision 2008-206). Corus' total for 2009-2010 includes: the Sundance Channel (formerly Drive-In Classics Channel) and W Movies (formerly SexTV: the Channel) following an acquisition of assets (Broadcasting Decision 2009-706).
10. Remstar acquired effective control of TQS inc., licensee of the following stations: CFJP-TV Montréal (including CFJP-DT), CFAP-TV Québec, CFKM-TV Trois-Rivières, CFKS-TV Sherbrooke, CFRS-TV Saguenay and the TQS network (Broadcasting Decision 2008-129). TQS was changed to V.
11. CBC/SRC's viewing share includes CKSH-TV Sherbrooke, CKTM-TV Trois-Rivières, and CKTV-TV Saguenay following an acquisition of assets (Broadcasting Decision 2008-130).
12. Rogers' viewing share includes: Outdoor Life Network following a change in control (Broadcasting Decision 2008-138); the Citytv stations (CHMI, CKAL, CITY, CKVU and CKEM) following a change in control (Broadcasting Decision 2007-360); Channel M (CHNM-TV), following an acquisition of assets (Broadcasting Decision 2008-72). Excludes: CHNU-TV Fraser Valley and CIIT-TV Winnipeg stations sold to Christian Channel Inc. (Broadcasting Decision CRTC 2008-71).
13. Following a change in effective control, Canwest's properties are now controlled by Shaw (Broadcasting Decision 2010-782). Shaw's viewing share includes the Alliance Atlantis properties following a change in control (Broadcasting Decision 2007-429). Shaw's viewing share for 2008-2009 excludes: CHCH-TV Hamilton following an acquisition of assets (Broadcasting Decision 2009-537) and CJNT-TV Montréal following an acquisition of assets (Broadcasting Decision 2009-536). Shaw's viewing share for 2009-2010 excludes: CHEK-TV following an acquisition of assets (Broadcasting Decision 2009-699)
14. Following a change in effective control, CTVglobemedia's properties are now controlled by BCE Inc. (BCE) (Broadcasting Decision 2011-163)
15. Included in "Other" are the following discretionary services that are held equally between Canadian partners:

Viewing share (%)	Canadian English-language market			Canadian French-language market		
	All of Canada, excluding Quebec franco market			Quebec franco market		
	2007-2008	2008-2009	2009-2010	2007-2008	2008-2009	2009-2010
Astral 50% / Shaw 50%						
• <i>Historia [Fr.]</i>	0.10	0.02	nm	1.64	1.74	1.80
• <i>Séries + [Fr.]</i>	0.02	0.03	0.01	3.69	3.58	3.45
Astral 50% / Corus 50%						
• <i>Teletoon [Eng.]</i>	1.83	1.77	2.32	0.09	0.06	0.06
• <i>Télétoon [Fr.]</i>	0.04	0.03	0.02	3.18	3.21	2.86
• <i>Teletoon Rétro [Eng.]</i>	0.39	0.43	0.48	nm	nm	0.04
• <i>Télétoon Retro [Fr.]</i>	n/o	0.01	0.31	n/o	0.22	0.01
Shaw 50% / Quebecor 50%						
• <i>Mystery [Eng.]</i>	0.49	0.59	0.49	nm	0.01	0.04
Astral / Corus						
• <i>HBO Canada</i> ¹⁶	n/a	0.32	0.35	n/a	nm	0.02

nm = not meaningful n/o= not in operation n/a= not available

16. HBO Canada is delivered as part of two separate, wholly owned and independently operated regional English-language pay services. The Movie Network (TMN) pay service, which is distributed in Eastern Canada, is part of the Astral ownership group. The Movie Central pay service, which is part of the Corus ownership group, is distributed in Western Canada. Due to BBM software limitations, a separate viewing share to HBO Canada for the TMN and Movie Central feeds is not available.

Figure 4.3.1 Television revenues: CBC and private conventional television, pay, PPV, VOD, and specialty services



- Advertising revenue includes infomercial sales. Includes CBC commercial revenues only – does not include parliamentary appropriations. Total revenue includes “other revenue” and for 2010, funding from the LPIF.
- 2008-2009 figures have been updated to reflect current 31 August aggregate results.
- Minor variances are due to rounding.

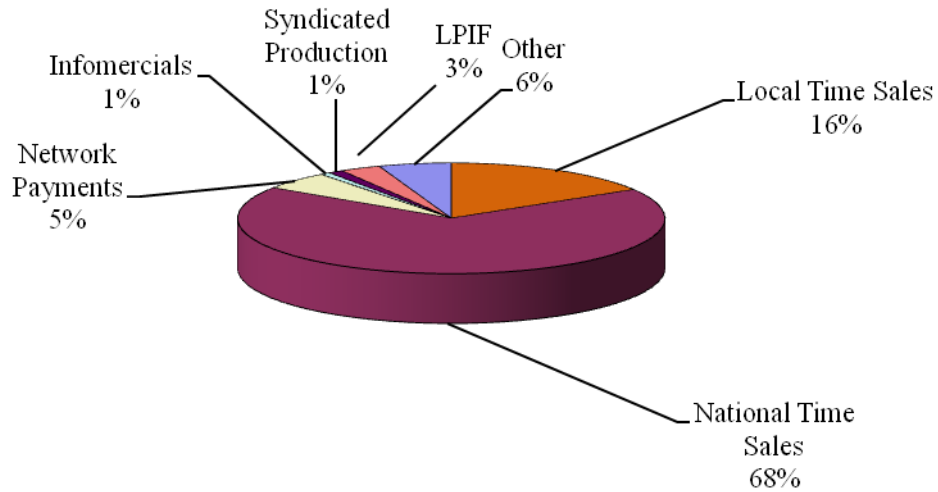
Source: CRTC data collection

Table 4.3.10 Television revenues by type of service (\$ millions)

	2009	2010	% growth
Conventional television			
Private	1,971	2,147	8.9
CBC	392 #	450	14.8
Subtotal	2,363 #	2,597	9.9
Nonconventional television			
Pay, PPV and VOD	696	802	15.2
Speciality	2,417	2,656	9.9
Subtotal	3,113 #	3,457	11.1
Total	5,475 #	6,055	10.6

Source: CRTC data collection

Figure 4.3.2 Source of revenues for private conventional television (2010)



Source: CRTC data collection

Table 4.3.11 Advertising and other revenues: CBC conventional television stations (owned and operated)

Revenues (\$ millions)	2006	2007	2008	2009	2010	CAGR 2006-2010
CBC conventional television						
Advertising revenues						
English-language stations	224	203	253	192	221	-0.4%
<i>Annual growth</i>	69%	-10%	25%	-24%	15%	
French-language stations	115	108	113	105	118	0.6%
<i>Annual growth</i>	14%	-6%	5%	-7%	12%	
Advertising total	339	310	366	297	339	0%
<i>Annual growth</i>	45%	-8%	18%	-19%	14%	
Other revenues	53	45	46	95	110.8	20%
<i>Annual growth</i>	-10%	-15%	2%	107%	17%	
Total	392	356	412	392	450	3.5%
<i>Annual growth</i>	34%	-9%	16%	-5%	15%	
Parliamentary appropriation	n/a	n/a	n/a	n/a	794	

- “Other revenues” includes:
 - a) for 2006 to 2010: other commercial revenues;
 - b) for 2009 and 2010: corporate revenues (if these revenues were included in 2008, the annual growth rate in 2009 would have been -20% instead of -5%); and
 - c) for 2010: LPIF.
- Minor variances are due to rounding.

Source: CRTC data collection

Table 4.3.12 Advertising and other revenues: Private conventional television stations

						CAGR
Revenues (\$ millions)	2006	2007	2008	2009	2010	2006-2010
English-language stations						
Advertising	1,693	1,717	1,679	1,520	1,650	-1%
<i>Annual growth</i>	1%	1%	-2%	-9%	9%	
<i>% of subtotal</i>	96%	96%	96%	94%	92%	
Other	63	73	75	101	144	23%
<i>Annual growth</i>	-22%	16%	3%	35%	42%	
<i>% of subtotal</i>	4%	4%	4%	6%	8%	
Subtotal	1,756	1,790	1,754	1,621	1,794	1%
<i>Annual growth</i>	0%	2%	-2%	-8%	11%	
French-language stations						
Advertising	327	323	322	286	273	-4%
<i>Annual growth</i>	-1%	-1%	0%	-11%	-4%	
<i>% of subtotal</i>	84%	85%	84%	82%	77%	
Other	60	58	62	64	80	8%
<i>Annual growth</i>	11%	-3%	7%	3%	26%	
<i>% of subtotal</i>	16%	15%	16%	18%	23%	
Subtotal	387	381	384	350	354	-2%
<i>Annual growth</i>	1%	-2%	1%	-9%	1%	
Total						
Advertising	2,020	2,040	2,001	1,806	1,923	-1%
<i>Annual growth</i>	0%	1%	-2%	-10%	6%	
<i>% of total</i>	94%	94%	94%	92%	90%	
Other	123	131	137	165	224	16%
<i>Annual growth</i>	-9%	7%	5%	20%	36%	
<i>% of total</i>	6%	6%	6%	8%	10%	
Total	2,143	2,171	2,138	1,971	2,147	0%
<i>Annual Growth</i>	0%	1%	-2%	-8%	9%	

- English-language stations include revenues from ethnic conventional stations, as a significant portion of their revenues are derived from English-language programming.
- For 2010, “other revenues” include funding from the LPIF.
- Minor variances are due to rounding.

Source: CRTC data collection

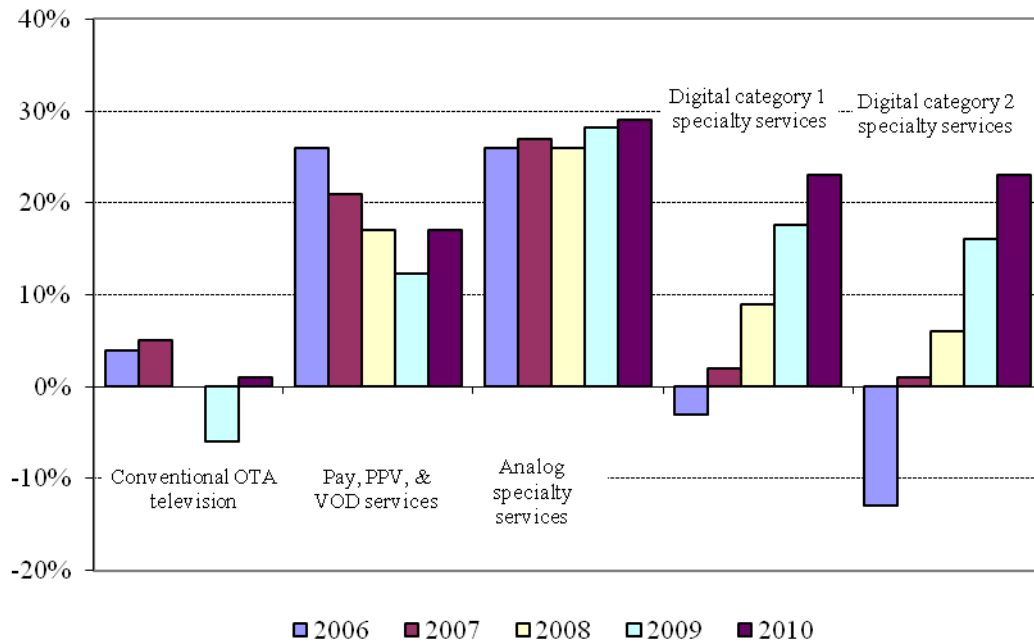
Table 4.3.13 Revenues: Pay, PPV, VOD and specialty analog and digital services

Services	Revenues (\$ thousands)			PBIT (\$ thousands)			PBIT margin		
	2008	2009	2010	2008	2009	2010	2008	2009	2010
<i>Specialty services</i>									
<i>English-language</i>									
Analog	1,582,809	1,615,684	1,777,612	409,870	468,121	522,697	25.9%	29.0%	29.4%
Digital category 1	74,756	83,324	90,766	5,967	14,273	21,055	8.0%	17.1%	23.2%
Digital category 2	177,409	216,451	241,500	16,120	40,095	62,361	9.1%	18.5%	25.8%
Subtotal	1,834,974	1,915,459	2,109,877	431,957	522,489	606,113	23.5%	27.3%	28.7%
<i>French-language</i>									
Analog	397,470	406,619	436,876	98,823	101,644	112,636	24.9%	25.0%	25.8%
Digital category 1	14,144	17,309	19,298	2,177	3,391	4,600	15.4%	19.6%	23.8%
Digital category 2	4,232	7,579	11,754	-1,523	-979	-2,666	-36%	-12.9%	-22.7%
Subtotal	415,847	431,507	467,928	99,476	104,056	144,570	23.9%	24.1%	24.5%
<i>Ethnic and third-language</i>									
Analog	65,393	62,485	67,942	18,072	17,862	19,234	27.6%	28.6%	28.3%
Digital category 1									
Digital category 2	8,090	7,746	10,102	89	-1,340	222	1.1%	-17.3%	2.2%
Subtotal	73,483	70,231	78,044	18,161	16,522	19,456	24.7%	23.5%	24.9%
<i>Total specialty services</i>									
Analog	2,045,672	2,084,788	2,282,430	526,766	587,628	654,567	25.8%	28.2%	28.7%
Digital category 1	88,900	100,633	110,063	8,143	17,664	25,655	9.2%	17.6%	23.3%
Digital category 2	189,732	231,776	263,356	14,686	37,776	59,917	7.7%	16.3%	22.8%
Subtotal	2,324,304	2,417,197	2,655,850	549,595	643,068	740,139	23.6%	26.6%	27.9%
<i>Pay, PPV, and VOD services</i>									
Pay services	360,103	402,237	447,982	96,557	47,931	100,412	26.8%	11.9%	22.4%
PPV services-Terrestrial & DTH	129,277	139,649	148,212	18,280	17,512	23,991	14.1%	12.5%	16.2%
VOD	122,649	153,723	205,429	21,702	20,137	12,778	17.7%	13.1%	6.2%
Subtotal	612,028	695,609	801,624	136,539	85,580	137,182	22.3%	12.3%	17.1%
Total	2,936,333	3,112,806	3,457,473	686,135	728,648	877,321	23.4%	23.4%	25.4%

• English-language includes bilingual services.

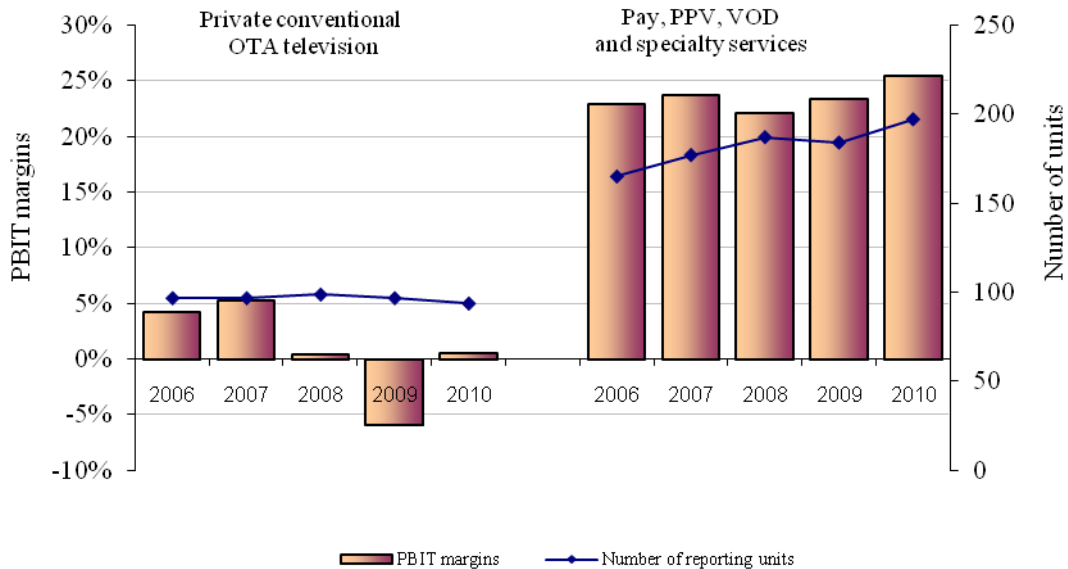
Source: CRTC data collection

Figure 4.3.3 Aggregate PBIT margins for private commercial conventional television, pay, PPV & VOD services, analog, digital Category 1 and Category 2 specialty services



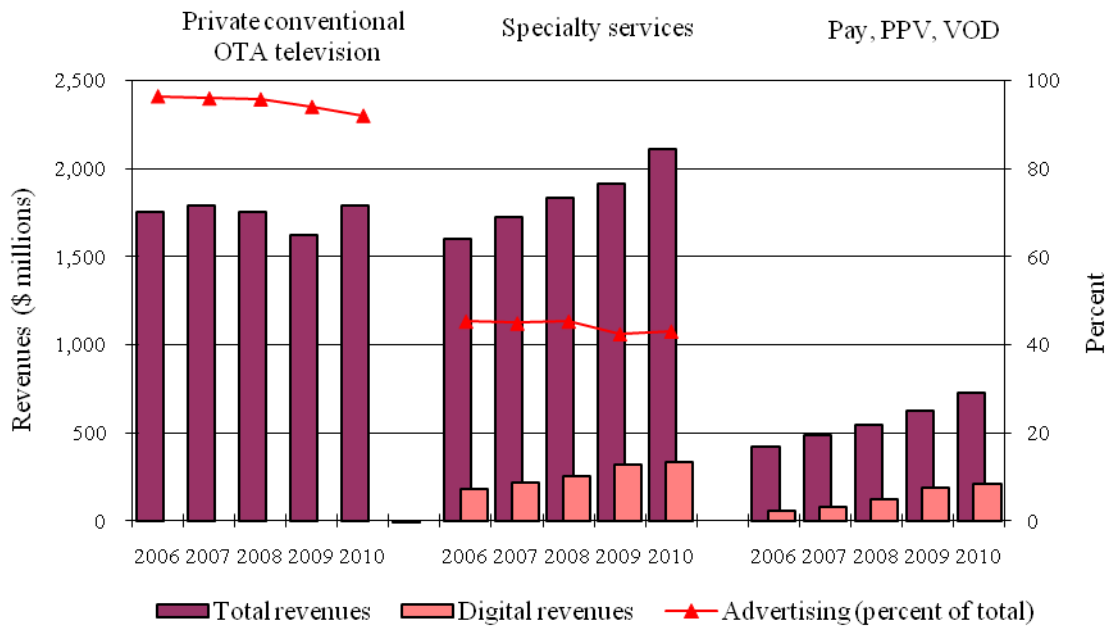
Source: CRTC data collection

Figure 4.3.4 Aggregate PBIT margins for private conventional television, pay, PPV, VOD, and specialty services



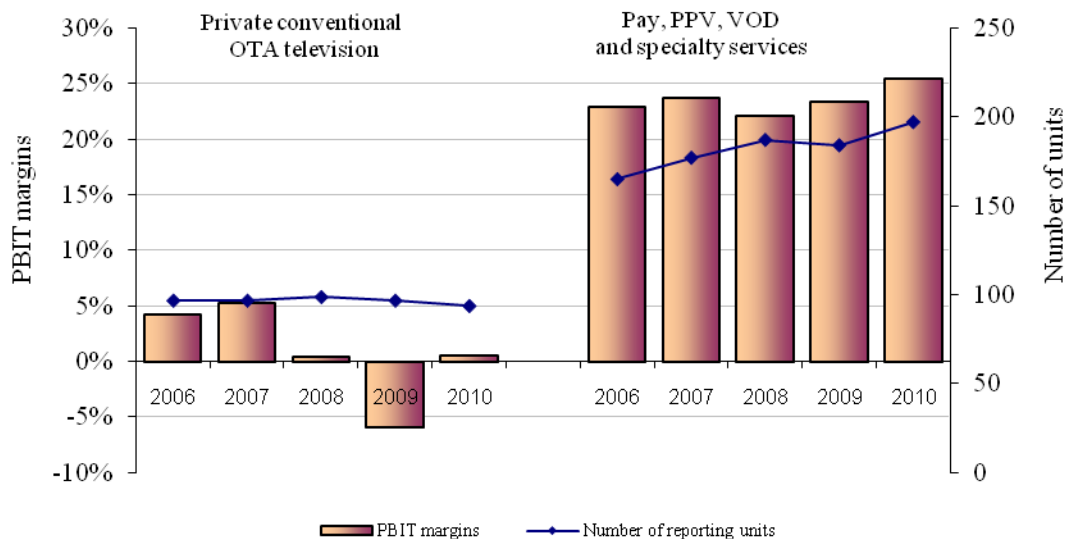
Source: CRTC data collection

Figure 4.3.5 Revenues of English-language private conventional television, specialty, pay, PPV, and VOD services



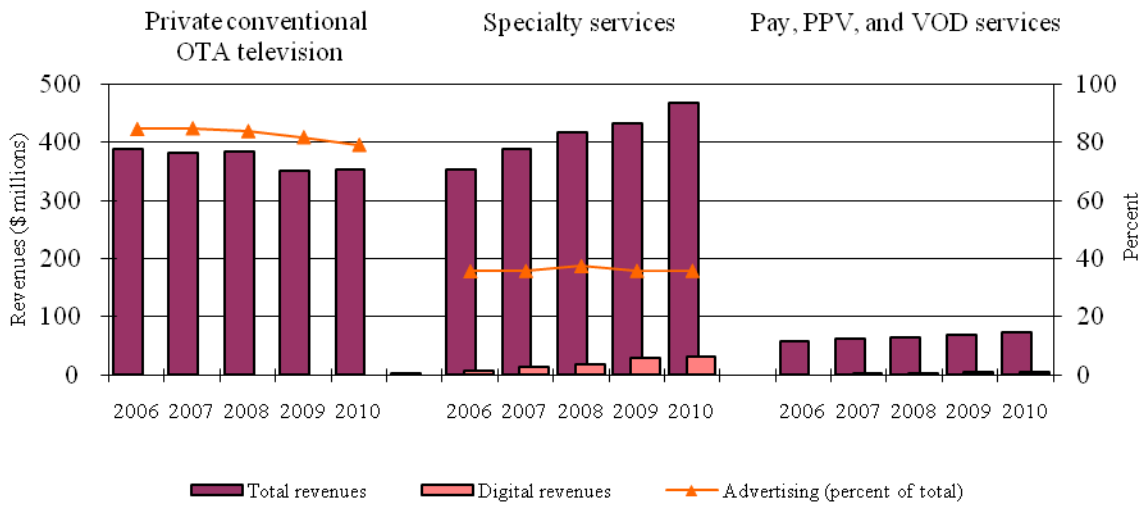
- English-language private conventional television includes ethnic conventional stations, as a significant portion of their revenues are derived from English-language programming.
 - English-language specialty, pay, PPV, and VOD services include bilingual services.
- Source: CRTC data collection

Figure 4.3.6 Aggregate PBIT margins for English-language private conventional television, pay, PPV, VOD, and specialty services



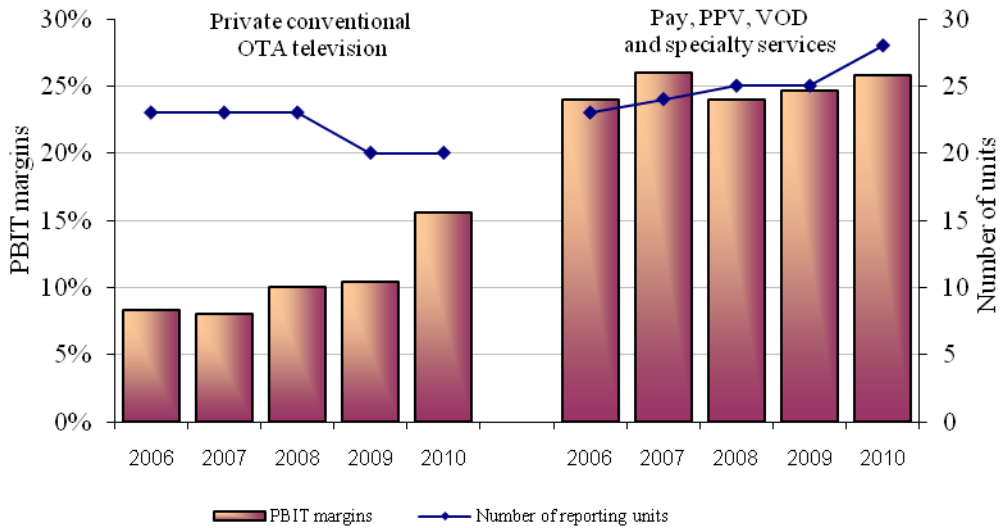
- English-language private conventional television includes ethnic private conventional stations, as a significant portion of their revenues are derived from English-language programming.
- English-language specialty, pay, PPV, and VOD services include bilingual services.
- Source: CRTC data collection

Figure 4.3.7 Revenues of French-language private conventional television, specialty, pay, PPV, and VOD services



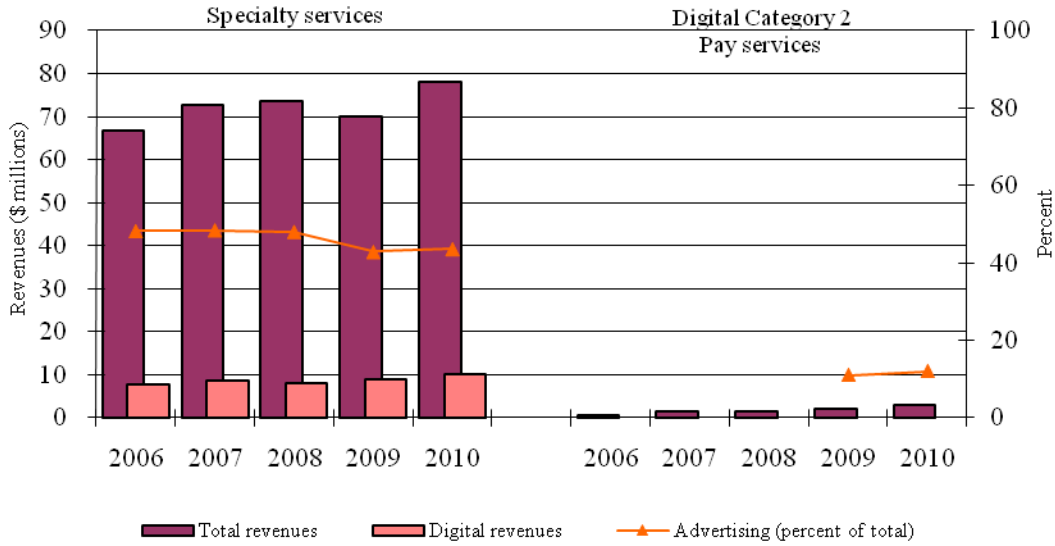
Source: CRTC data collection

Figure 4.3.8 Aggregate PBIT of French-language private conventional television, pay, PPV, VOD, and specialty services



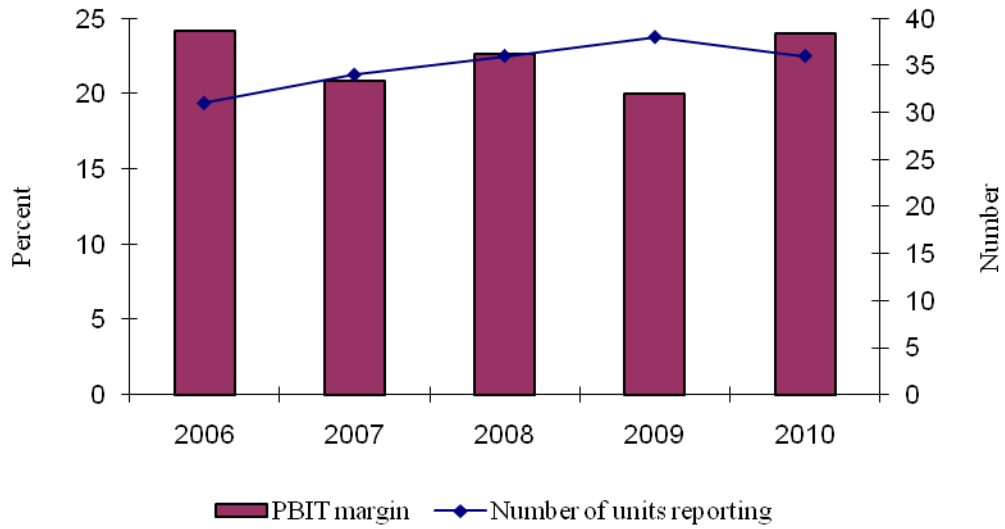
Source: CRTC data collection

Figure 4.3.9 Revenues of ethnic and third-language specialty and digital Category 2 pay services



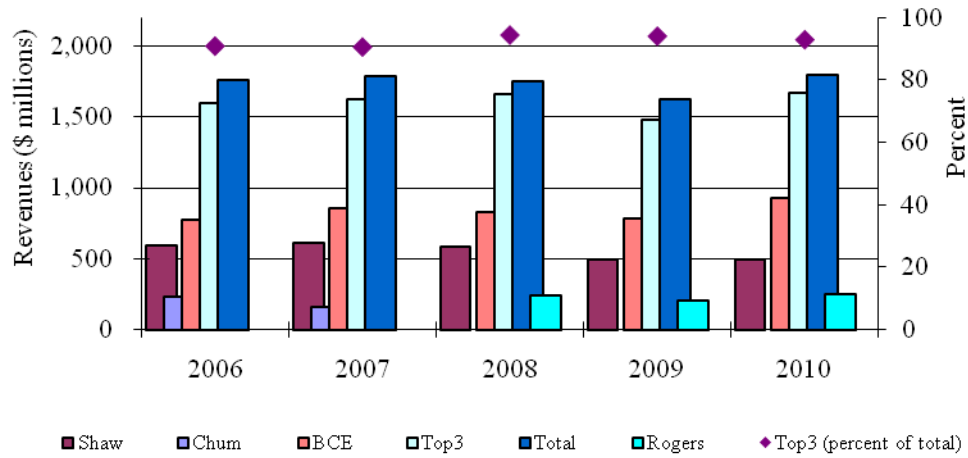
Source: CRTC Data Collection

Figure 4.3.10 PBIT margins of ethnic and third-language specialty and digital Category 2 pay services



Source: CRTC data collection

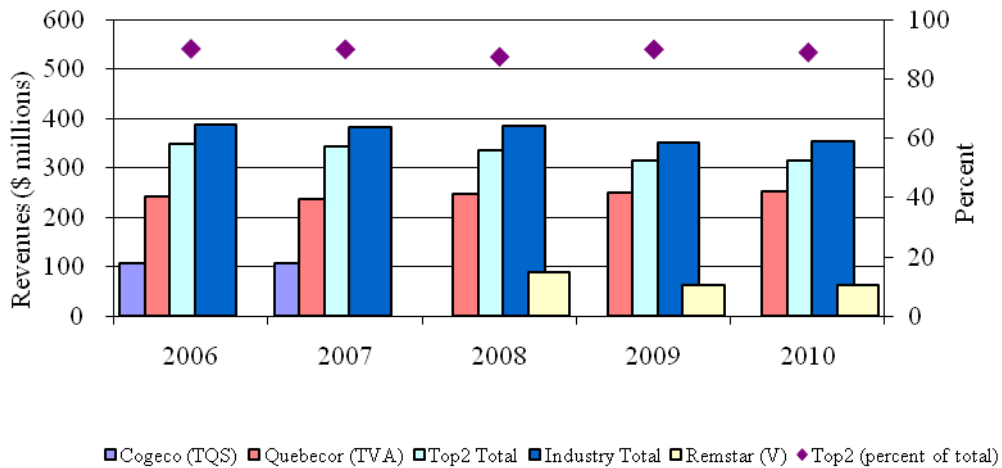
Figure 4.3.11 Revenues of large English-language private conventional television ownership groups



- Based on conventional OTA stations owned or controlled by the ownership group on 31 August of each year. Ownership is based on the date of the approving decision, not the official closing date of the transaction. The station’s entire annual revenue is attributed to the ownership group that was deemed to be its owner as of 31 August.
- English-language private conventional television includes ethnic private conventional stations, as a significant portion of their revenues are derived from English-language programming.
- Following a change in effective control, Canwest’s properties are now controlled by Shaw (Broadcasting Decision 2010-782). Shaw’s total for 2008-2009 excludes: CHCH-TV Hamilton following an acquisition of assets (Broadcasting Decision 2009-537) and CJNT-TV Montréal following an acquisition of assets (Broadcasting Decision 2009-536). Shaw’s total for 2009-2010 excludes: CHEK-TV following an acquisition of assets (Broadcasting Decision 2009-699)
- Following a change in effective control, CTV’s properties are now controlled by BCE (Broadcasting Decision 2011-163). BCE and CHUM’s results reflect Broadcasting Decision CRTC 2007-165.

Source: CRTC data collection

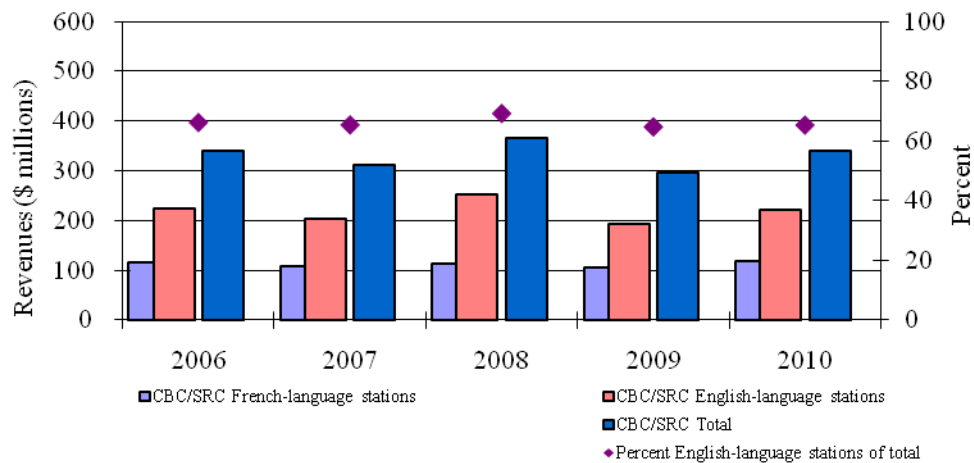
Figure 4.3.12 Revenues of large French-language private conventional television ownership groups



- Based on conventional stations owned or controlled by the ownership group on 31 August of each year. Ownership is based on the date of the approval decision, not the official closing date of the transaction. The station's entire annual revenue is attributed to the ownership group that was deemed to be its owner as of 31 August.
- In Broadcasting Decision 2008-129, the Commission approved, subject to certain conditions, the acquisition by Remstar of TQS's network and television stations in Montréal, Québec, Trois-Rivières, Sherbrooke, and Saguenay. TQS was changed to V.
- In Broadcasting Decision 2008-130 the Commission approved the acquisition by CBC of the assets of the French-language television programming undertakings CKSH-TV Sherbrooke, CKTM-TV Trois-Rivières, and CKTV-TV Saguenay and its transmitter CKTV-TV-1 Saint-Fulgence, Quebec, from TQS.

Source: CRTC data collection

Figure 4.3.13 Advertising revenues: CBC conventional television stations (owned & operated)



Source: CRTC data collection

Table 4.3.14 Ownership groups with significant ownership interest in specialty, pay, PPV, and VOD services as of 31 December 2010 (Part 1 of 6)¹

	Type of service	Language	Direct / indirect voting interest	31 August 2010 financial results (thousands)			
				Number of subscribers	Revenues (\$)	PBIT (\$)	PBIT Margin
Astral							
✓ Canal D	Sp. A	f	100%	2,591	35,469	18,056	50.9%
✓ Canal Vie	Sp. A	f	100%	2,316	41,636	16,862	40.5%
CINÉPOP	Pay 2	f	100%	n.a.	n.a.	n.a.	n.a.
✓ The Family Channel	Pay	e	100%	6,031	61,746	21,978	35.6%
✓ Mpix	Pay	e	100%	1,629	24,055	12,613	52.4%
✓ Super Écran	Pay	f	100%	627	63,630	19,798	31.1%
✓ The Movie Network	Pay	e	100%	1,221	136,536	31,525	23.1%
✓ VRAK.TV	Sp. A	f	100%	2,553	25,874	10,743	41.5%
✓ Ztélé	Sp. A	f	100%	2,037	20,532	7,972	38.8%
Viewers Choice Canada	PPV**	e	50.10%	2,082	16,141	2,631	16.3%
✓ Historia	Sp. A	f	50%	2,050	17,983	7,897	43.9%
✓ Musimax	Sp. A	f	100%	2,108	9,083	456	5.0%
✓ MusiquePlus	Sp. A	f	100%	2,507	12,084	-2,103	-17.4%
✓ Séries+	Sp. A	f	50%	2,058	28,637	17,064	59.6%
✓ Teletoon/Télétoon	Sp. A	b	50%	7,931	83,823	40,173	47.9%
Teletoon retro English	Sp. D2	e	50%	n.a.	n.a.	n.a.	n.a.
Télétoon rétro French	Sp. D2	f	50%	n.a.	n.a.	n.a.	n.a.
Playhouse Disney Télé ^a	Sp. D2	b	100%	n.a.	n.a.	n.a.	n.a.

a) Rebranded as Disney Junior on May 6, 2011.

Table 4.3.14 Ownership groups with significant ownership interest in specialty, pay, PPV, and VOD services as of 31 December 2010 (Part 2 of 6)¹

	Type of service	Language	Direct / indirect voting interest	31 August 2010 financial results (thousands)			
				Number of subscribers	Revenues (\$)	PBIT (\$)	PBIT Margin
BCE²							
✓ CTV News Channel	Sp. A	e	100%	8,667	23,879	7,192	30.1%
✓ MTV Canada	Sp. A	e	100%	6,708	24,241	-2,565	-10.6%
✓ Business News Network	Sp. A	e	100%	6,153	30,150	10,857	36.0%
✓ Comedy Network	Sp. A	e	100%	6,316	55,504	18,585	33.5%
ESPAN Classic Canada	Sp. D2	e	80%	n.a.	n.a.	n.a.	n.a.
✓ Réseau des Sports (RDS)	Sp. A	f	80%	3,198	119,576	17,770	14.9%
Réseau Info Sports (RIS)	Sp. D1	f	80%	1,419	10,172	3,695	36.3%
✓ The Sports Network (TSN)	Sp. A	e	80%	9,180	267,618	52,961	19.8%
Animal Planet	Sp. D2	e	64%	n.a.	n.a.	n.a.	n.a.
✓ Discovery Channel	Sp. A	e	64%	8,198	95,851	33,322	34.8%
Discovery Science (formerly Discovery Civilization Channel)	Sp. D2	e	64%	n.a.	n.a.	n.a.	n.a.
✓✓ Discovery World HD (formerly Discovery HD)	Sp. D2	e	64%	n.a.	n.a.	n.a.	n.a.
Viewers Choice Canada	PPV**	e	19.96%	2,082	16,141	2,631	16.3%
The NHL Network	Sp. D2	e	17.14%	n.a.	n.a.	n.a.	n.a.
✓ Book Television	Sp. D1	e	100%	987	4,284	1,239	28.9%
✓ Bravo!	Sp. A	e	100%	7,180	42,598	11,378	26.7%
Investigation Discovery (formerly CourtTV Canada)	Sp. D2	e	100%	n.a.	n.a.	n.a.	n.a.
✓ FashionTelevisionChannel	Sp. D1	e	100%	878	4,745	2,798	59.0%
MuchLoud	Sp. D2	e	100%	n.a.	n.a.	n.a.	n.a.
✓ MuchMore	Sp. A	e	100%	6,291	16,796	4,607	27.4%
MuchMoreRetro	Sp. D2	e	100%	n.a.	n.a.	n.a.	n.a.
✓ MuchMusic	Sp. A	e	100%	8,370	42,194	3,735	8.9%
MuchVibe	Sp. D2	e	100%	n.a.	n.a.	n.a.	n.a.
✓ CablePulse 24	Sp. A	e	100%	2,905	18,742	102	0.5%
PunchMuch	Sp. D2	e	100%	n.a.	n.a.	n.a.	n.a.
✓ MTV2 Canada	Sp. D1	e	100%	884	4,738	-156	-3.3%
✓ SPACE	Sp. A	e	100%	7,004	48,728	13,741	28.2%
✓ E! (formerly Star!)	Sp. A	e	100%	6,199	25,567	7,468	29.2%
Comedy Gold ^a (formerly TV Land)	Sp. D2	e	100%	n.a.	n.a.	n.a.	n.a.
✓ Bell TV On Demand and Vu!	PPV**	b	100%	1,956	57,881	8,187	14.1%
✓ Bell TV On Demand	PPV	b	100%	n.a.	n.a.	n.a.	n.a.
✓ Bell TV On Demand	VOD	b	100%	n.a.	n.a.	n.a.	n.a.
✓ Câblevision du Nord de Québec inc.	VOD	f	100%	23	466	100	21.5%

- In October 2010, the Commission approved the sale of travel + escape to GlassBOX Television Inc. (Broadcasting Decision CRTC 2010-792).
- a) In August 2010, 3888495 Canada Ltd (now Bell Media Inc.) acquired the remaining 19.9% interest of TV Land from Viacom.

Table 4.3.14 Ownership groups with significant ownership interest in specialty, pay, PPV, and VOD services as of 31 December 2010 (Part 3 of 6)¹

		Type of service	Language	Direct / indirect voting interest	31 August 2010 financial results (thousands)			
					Number of subscribers	Revenues (\$)	PBIT (\$)	PBIT Margin
CBC								
✓	Bold	Sp. D1	e	100%	2,088	4,286	327	7.6%
✓	CBC News Network	Sp. A	e	100%	10,891	85,497	16,285	19.0%
✓	RDI	Sp. A	f	100%	10,888	54,343	7,100	13.1%
✓	ARTV	Sp. A	f	85%	2,130	16,554	62	0.4%
✓	Documentary	Sp. D1	e	82%	2,290	5,494	317	5.8%
• In September 2009, CBC sold its pay audio service, Galaxie to Stingray Digital.								
		Type of service	Language	Direct / indirect voting interest	31 August 2010 financial results (thousands)			
					Number of subscribers	Revenues (\$)	PBIT (\$)	PBIT Margin
Cogeco								
		VOD	b	100%	n.a.	n.a.	n.a.	n.a.
		Type of service	Language	Direct / indirect voting interest	31 August 2010 financial results (thousands)			
					Number of subscribers	Revenues (\$)	PBIT (\$)	PBIT Margin
Corus³								
✓	Encore Avenue	Pay	e	100%	2,444	19,176	9,370	48.9%
✓	MovieCentral	Pay	e	100%	963	107,815	20,751	19.2%
	TreeHouse TV	Sp. A	e	100%	8,516	14,403	5,572	38.7%
	W Network	Sp. A	e	100%	8,374	87,729	38,328	43.7%
	YTV	Sp. A	e	100%	11,159	85,651	25,951	30.3%
	CMT Canada	Sp. A	e	90%	10,542	27,033	8,016	29.7%
	Discovery Kids ^a	Sp. D2	e	80%	n.a.	n.a.	n.a.	n.a.
✓	Dusk	Sp. D2	e	51%	n.a.	n.a.	n.a.	n.a.
	Sky TG24 Canada	Sp. D2	o	50.50%	n.a.	n.a.	n.a.	n.a.
	TLN - Telelatino	Sp. A	o	50.50%	5,239	22,144	10,608	47.9%
✓	Teletoon/Télétoon ^b	Sp. A	b	50%	7,931	83,823	40,173	47.9%
	Teletoon retro English ^b	Sp. D2	e	50%	n.a.	n.a.	n.a.	n.a.
	Télétoon rétro French	Sp. D2	f	50%	n.a.	n.a.	n.a.	n.a.
✓	Food Network Canada	Sp. A	e	22.58%	6,270	46,832	18,857	40.3%
	EuroWorld Sport	Sp. D2	e	50.50%	n.a.	n.a.	n.a.	n.a.
	Mediaset Italia	Sp. D2	o	50.50%	n.a.	n.a.	n.a.	n.a.
	TLN en español	Sp. D2	o	50.50%	n.a.	n.a.	n.a.	n.a.
	Nickelodeon (formerly YTV OneWorld)	Sp. D2	e	100%	n.a.	n.a.	n.a.	n.a.
	VIVA ^c	Sp. A	e	100%	5,742	20,991	8,983	42.8%
	Cosmopolitan TV	Sp. D2	e	67%	n.a.	n.a.	n.a.	n.a.
	Sundance Channel (formerly Drive-In Classics) ^d	Sp. D2	e	100%	n.a.	n.a.	n.a.	n.a.
	W Movies (formerly Sex TV: The Channel) ^d	Sp. D2	e	100%	n.a.	n.a.	n.a.	n.a.

a) Ceased operation on November 1st 2009.

b) 20% of the 50% voting interest is held by Nelvana Limited, a company that produces and distributes children and family productions. Corus Entertainment Inc. holds 100% voting interest in Nelvana Limited.

c) Rebranded as OWN (Oprah Winfrey Network) on March 1, 2011.

d) In Broadcasting Decision 2009-706, the Commission approved the sale from CTVglobemedia to Corus of the English-language category 2 specialty television programming undertakings known as Sex TV: The Channel and Drive-In Classics.

Table 4.3.14 Ownership groups with significant ownership interest in specialty, pay, PPV, and VOD services as of 31 December 2010 (Part 4 of 6)¹

	Type of service	Language	Direct / indirect voting interest	31 August 2010 financial results (thousands)			
				Number of subscribers	Revenues (\$)	PBIT (\$)	PBIT Margin
Quebecor							
✓ Illico sur demande	VOD	b	100%	1,150	51,236	7,096	13.9%
Argent	Sp. D1	f	100%	958	4,119	676	16.4%
✓ Le Canal Nouvelles (LCN)	Sp. A	f	100%	2,274	26,934	9,021	33.5%
✓ addikTV (formerly Mystère)	Sp. D1	f	100%	766	5,007	229	4.6%
Prise 2	Sp. D2	f	100%	n.a.	n.a.	n.a.	n.a.
The Cave (formerly MenTV)	Sp. D1	e	51%	818	4,741	86	1.8%
Mystery TV	Sp. D1	e	50%	1,680	12,386	3,192	25.8%
CASA (formerly Les idées de ma maison)	Sp. D2	f	100%	n.a.	n.a.	n.a.	n.a.
✓ Canal Indigo	PPV**	f	100%	1,150	6,098	4,737	77.7%
Yoopla	Sp. D2	f	100%	n.a.	n.a.	n.a.	n.a.
Évasion	Sp. A	f	8.31%	2,029	11,596	1,776	15.3%

	Type of service	Language	Direct / indirect voting interest	31 August 2010 financial results (thousands)			
				Number of subscribers	Revenues (\$)	PBIT (\$)	PBIT Margin
Rogers							
The Biography Channel	Sp. D1	e	100%	1,250	8,618	3,365	39.0%
Rogers On Demand	VOD	b	100%	1,701	63,932	6,800	10.6%
✓ Rogers Sportsnet	Sp. A	e	100%	9,130	216,921	46,819	21.6%
✓ Rogers Sportsnet PPV	PPV**	e	100%	56	14,725	3,397	23.1%
G4TechTV	Sp. D1	e	100%	1,243	9,708	2,710	27.9%
Viewers Choice Canada	PPV**	e	24.95%	2,082	16,141	2,631	16.3%
✓ OLN (Outdoor Life Network)	Sp. A	e	100%	6,194	18,246	7,683	42.1%
TVtropolis	Sp. A	e	33.33%	6,446	44,792	9,105	20.3%
Rogers Pay Audio	Sp. A	b	100%	n.a.	n.a.	n.a.	n.a.
Setanta Sports Canada	Sp. D2	e	53.40%	n.a.	n.a.	n.a.	n.a.

Table 4.3.14 Ownership groups with significant ownership interest in specialty, pay, PPV, and VOD services as of 31 December 2010 (Part 5 of 6)¹

	Type of service	Language	Direct / indirect voting interest	31 August 2010 financial results (thousands)			
				Number of subscribers	Revenues (\$)	PBIT (\$)	PBIT Margin
Shaw⁴							
DejaView	Sp. D2	e	100%	n.a.	n.a.	n.a.	n.a.
Fox Sports World Canada	Sp. D2	e	100%	n.a.	n.a.	n.a.	n.a.
MovieTime	Sp. D2	e	100%	n.a.	n.a.	n.a.	n.a.
TVtropolis	Sp. A	e	66.67%	6,446	44,792	9,105	20.3%
Mystery TV	Sp. D1	e	50%	1,680	12,386	3,192	25.8%
The Cave (formerly MenTV)	Sp. D1	e	49%	818	4,741	86	1.8%
✓ History Television	Sp. A	e	100%	7,277	62,715	36,536	58.3%
The Independent Film Channel Canada	Sp. D1	e	100%	2,830	9,206	2,425	26.3%
✓ Showcase	Sp. A	e	100%	8,401	71,696	36,943	51.5%
Action (formerly Showcase Action)	Sp. D2	e	100%	n.a.	n.a.	n.a.	n.a.
Showcase Diva	Sp. D2	e	100%	n.a.	n.a.	n.a.	n.a.
✓ Slice	Sp. A	e	100%	6,639	36,137	6,017	16.7%
Fine Living ^a	Sp. D2	e	80.24%	n.a.	n.a.	n.a.	n.a.
✓ HGTV Canada (Home and Garden)	Sp. A	e	80.24%	7,756	71,112	29,877	42.0%
BBC Canada	Sp. D2	e	80%	n.a.	n.a.	n.a.	n.a.
BBC Kids	Sp. D2	e	80%	n.a.	n.a.	n.a.	n.a.
Twist TV (formerly Discovery Health Network)	Sp. D1	e	100%	2,186	6,150	2,645	43.0%
✓ National Geographic Channel Canada	Sp. D2	e	80%	n.a.	n.a.	n.a.	n.a.
✓ Food Network Canada	Sp. A	e	57.58%	6,270	46,832	18,857	40.3%
✓ Historia	Sp. A	f	50%	2,050	17,983	7,897	43.9%
✓ Séries+	Sp. A	f	50%	2,058	28,637	17,064	59.6%
✓ Dusk	Sp. D2	e	49%	n.a.	n.a.	n.a.	n.a.
One: The Body, Mind & Spirit Channel	Sp. D1	e	37.77%	961	4,152	951	22.9%
Global Reality Channel	Sp. D2	e	100%	n.a.	n.a.	n.a.	n.a.
D.I.Y. Network	Sp. D2	e	80.24%	n.a.	n.a.	n.a.	n.a.
✓ Shaw Pay-Per-View	PPV**	e	100%	n.a.	10,883	1,714	15.8%
✓ Shaw Pay-Per-View	PPV	e	100%	n.a.	31,046	3,015	9.7%
Shaw on Demand	VOD	b	100%	n.a.	62,745	11,206	17.9%

a) Fine Living ceased operations 19 October 2009.

Table 4.3.14 Ownership groups with significant ownership interest in specialty, pay, PPV, and VOD services as of 31 December 2010 (Part 6 of 6)¹

Notes to table 4.3.14:

1. As indicated in Broadcasting Notice of Consultation CRTC 2010-783-2, the publication of financial information relating to individual category 2 digital pay and specialty services for the broadcast year ended 31 August 2010 will be deferred pending the deliberation and determinations in the vertical integration hearing.
 2. Following a change in effective control, CTVglobemedia's properties are now controlled by BCE (Broadcasting Decision 2011-163).
 3. Shaw is affiliated with Corus as J.R. Shaw has voting control of both companies.
 4. Following a change in effective control, Canwest's properties are now controlled by Shaw (Broadcasting Decision 2010-782).
- Ownership in Table 4.3.14 is based on the percentage of direct and indirect voting interest held on 31 December 2010. Where a change in ownership has occurred, the information is based on the date of the approval decision, not the closing date of the transaction.
 - Table 4.3.14 presents the ownership percentages and the financial results for individual speciality, Pay and PPV services. The percent ownership is not reflected in these results. For this reason, no totals per ownership group are provided.
 - Includes only services that have been launched as of 31 December 2010.

Legend:

- √ Indicates that the service has been authorized to make available an upgraded HD format version. Reflects decisions issued up to 31 December 2010.
- √√ Indicates high definition (HD) programming undertaking. Reflects decisions issued up to 31 December 2010.
- Type of service:
 - Sp. A = Specialty analog service
 - Sp. D1 = Specialty digital category 1 service
 - Sp. D2 = Specialty digital category 2 service
 - Pay = Pay analogue service
 - Pay 2 = Pay digital category 2 service
 - DTH = Direct-to-home
 - PPV = Pay-per-view
 - PPV** = Holds both a terrestrial and DTH PPV licence
 - VOD = Video-on-demand
- Language: e = English; f = French; o = Other; b=English/French

Source: CRTC Ownership records and CRTC data collection

Table 4.3.15 Canadian Programming Expenditure (CPE) - CBC English- and French-language conventional television

Genre (\$ thousands)	2006	2007	2008	2009	2010	Annual growth %			
						2007	2008	2009	2010
News (category 1)	116,559	119,552	132,457	165,717	203,223	3%	11%	25%	23%
Other information (categories 2 to 5)	76,908	84,881	94,782	109,418	76,334	10%	12%	15%	-30%
Sports (category 6)	141,489	97,781	189,427	151,315	159,521	-31%	94%	-20%	5%
Drama and comedy (category 7)	116,809	112,132	137,363	131,640	148,868	-4%	23%	-4%	13%
Music and variety (categories 8 & 9)	35,514	26,648	27,059	22,760	14,159	-25%	2%	-16%	-38%
Game show (category 10)	165	823	13,373	13,803	12,234	399%	1,525%	3%	-11%
Human interest (category 11)	43,466	53,490	74,584	63,295	81,875	23%	39%	-15%	29%
Other (categories 12 to 15)	-	-	-	-41	-	-	-	-	-
Total (categories 1 to 15)	530,910	495,307	669,045	657,907	696,215	-7%	35%	-2%	6%

- Expenditures exclude indirect and facility cost allocations. Certain programming related expenses are included as programming costs beginning in 2008 consistent with CRTC guidelines.
- Minor variances are due to rounding.

Source: CRTC data collection

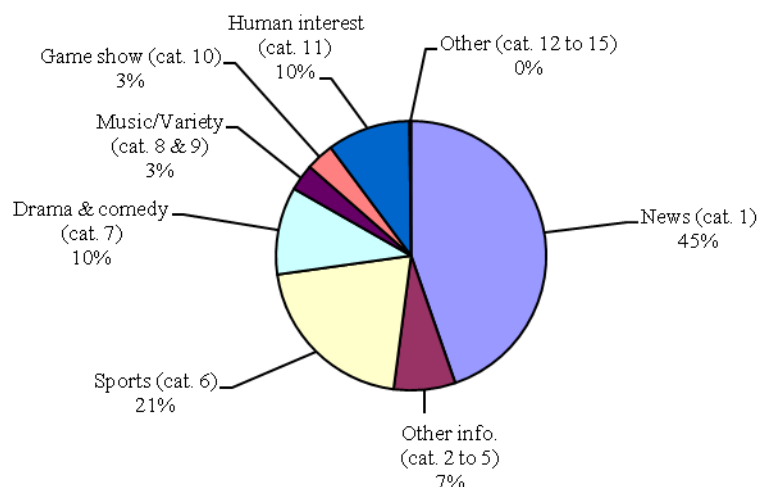
Table 4.3.16 Canadian Programming Expenditure (CPE) - Private conventional television

Genre (\$ thousands)	2006	2007	2008	2009	2010	Annual growth %			
						2007	2008	2009	2010
News (category 1)	328,078	324,772	322,997	312,106	304,358	-1%	-1%	-3%	-2%
Other information (categories 2 to 5)	66,288	62,014	67,190	72,840	50,474	-6%	8%	8%	-31%
Sports (category 6)	9,336	8,600	7,510	3,803	141,011	-8%	-13%	-49%	3608%
Drama and comedy (category 7)	73,857	76,452	88,334	77,372	71,365	4%	16%	-12%	-8%
Music and variety (categories 8 & 9)	35,047	23,897	24,706	38,182	21,678	-32%	3%	55%	-43%
Game show (category 10)	5,678	12,158	16,559	12,510	22,933	114%	36%	-24%	83%
Human interest (category 11)	101,637	104,473	90,443	82,293	68,256	3%	-13%	-9%	-17%
Other (categories 12 to 15)	3,827	3,647	1,905	276	1,173	-5%	0%	-86%	325%
Total (categories 1 to 15)	623,747	616,013	619,643	599,383	681,248	-1%	1%	-3%	14%
% of total revenue	29.11%	28.38%	28.98%	30.42%	31.73%				

- Amounts include expenditures on Canadian programs telecast, writedowns of Canadian inventory, script and concept and loss on equity Canadian programs.
- Excludes CTF “top-up” funding reported by OTA stations. Includes expenditures relating to ownership transfer benefits and to commitments made at the time of licensing.
- Minor variances are due to rounding.

Source: CRTC data collection

Figure 4.3.14 Canadian Programming expenditures (CPE) - distribution by genre for private conventional television (2010)



Source: CRTC data collection

Table 4.3.17 Expenditures on non-Canadian programming - Private conventional television

Genre (\$ thousands)	2006	2007	2008	2009	2010	Annual growth %			
						2007	2008	2009	2010
News (category 1)	6	10	5	20	145	74%	-48%	300%	625%
Other information (categories 2 to 5)	9,340	8,800	11,973	12,405	5,270	-6%	36%	55%	-72%
Sports (category 6)	10,419	9,164	11,261	13,746	14,823	-12%	23%	22%	8%
Drama and comedy (category 7)	480,349	507,689	524,235	602,865	553,796	6%	3%	14%	-7%
Music and variety (categories 8 & 9)	21,096	29,123	28,825	31,710	32,968	38%	-1%	10%	5%
Game show (category 10)	35,332	45,112	47,892	13,016	6,078	28%	6%	-70%	-57%
Human interest (category 11)	131,588	120,649	151,667	172,007	164,091	-8%	26%	2%	6%
Other (categories 12 to 15)	142	1,380	-619	517	6	872%	-145%	183%	-99%
Total (categories 1 to 15)	688,273	721,927	775,240	846,286	777,176	5%	7%	7%	
% of total revenues	32.12%	33.26%	36.25%	42.9%	36.19%				

- Amounts include expenditures on non-Canadian programs telecast and write-downs of non-Canadian programming.
- Minor variances are due to rounding.

Source: CRTC data collection

Table 4.3.18 Expenditures on Canadian and non-Canadian programming by genre reported by pay and specialty services (Part 1 of 2)

Genre (\$ thousands)	Eligible Expenditures on Canadian Programming (CPE) ¹			Expenditures on non-Canadian programming		
	2009	2010	Growth	2009	2010	Growth
<i>Number of services reporting</i>	104	110		104	110	
English-language services²						
News (category 1)	112,140	128,637	15%	579	215	-63%
Other information (categories 2 to 5)	167,639	141,329	-16%	40,369	23,143	-43%
Sports (category 6)	237,637	287,656	21%	43,681	51,569	18%
Drama and comedy (category 7)	151,854	146,627	-3%	262,036	264,169	1%
Music and variety (categories 8 & 9)	28,973	24,405	-16%	2,025	2,014	-1%
Game show (category 10)	7,650	4,395	-43%	814	1,478	82%
Human interest (category 11)	63,300	74,308	17%	24,552	25,409	3%
Other (categories 12 to 15)	25,465	33,055	30%	436	568	30%
Total (categories 1 to 15)	794,658	840,412	6%	374,492	368,565	-2%
<i>Number of services reporting</i>	23	25		23	25	
French-language services						
News (category 1)	48,539	48,267	-1%	46	36	-22%
Other information (categories 2 to 5)	53,777	51,902	-3%	7,576	7,442	-2%
Sports (category 6)	54,963	63,521	16%	5,200	5,318	2%
Drama & comedy (category 7)	34,701	39,051	13%	35,667	36,923	4%
Music and variety (category 8 & 9)	9,673	10,203	5%	571	1,379	142%
Game show (category 10)	742	1,467	98%	73	124	70%
Human interest (category 11)	6,580	6,509	-1%	853	844	-1%
Other (category 12 to 15)	9,082	10,058	11%	469	743	58%
Total (categories 1 to 15)	218,057	230,978	6%	50,455	52,809	5%
<i>Number of services reporting</i>	32	35		32	35	
Ethnic or third-language services						
News (category 1)	2,393	3,033	27%	512	869	70%
Other information (categories 2 to 5)	3,877	2,426	-37%	719	778	8%
Sports (category 6)	588	2,451	317%	496	763	54%
Drama and comedy (category 7)	3,004	1,638	-45%	3,118	5,015	61%
Music and variety (categories 8 & 9)	7,855	7,036	-10%	1,814	1,137	-37%
Game show (category 10)	142	68	-52%	87	117	34%
Human interest (category 11)	2,831	2,326	-18%	1,871	2,116	13%
Other (categories 12 to 15)	160	2,463	1439%	150	282	88%
Total (categories 1 to 15)	20,850	21,441	3%	8,768	11,077	26%

Table 4.3.18 Expenditures on Canadian and non-Canadian programming by genre reported by pay and specialty services (Part 2 of 2)

Genre (\$ thousands)	Eligible Expenditures on Canadian Programming (CPE) ¹			Expenditures on non-Canadian programming		
	2009	2010	Growth	2009	2010	Growth
<i>Number of services reporting</i>	159	170		159	170	
Total pay and specialty services						
News (category 1)	163,072	179,937	10%	1,137	1,120	-1%
Other information (categories 2 to 5)	225,293	195,657	-13%	48,664	31,363	-36%
Sports (category 6)	293,188	353,628	21%	49,377	57,650	17%
Drama and comedy (category 7)	189,559	187,316	-1%	300,821	306,107	2%
Music and variety (categories 8 & 9)	46,501	41,644	-10%	4,410	4,530	3%
Game show (category 10)	8,534	5,930	-31%	974	1,719	76%
Human interest (categories 11)	72,711	83,143	14%	27,276	28,369	4%
Other (categories 12 to 15)	34,707	45,576	31%	1,055	1,593	51%
Total (categories 1 to 15)	1,033,565	1,092,831	6%	433,714	432,451	21%

1. Includes bilingual services. Excludes CTF “top-up” funding reported by pay and specialty services. Includes expenditures relating to tangible benefits and to commitments made at the time of licensing.

2. Includes bilingual services.

Source: CRTC data collection

Table 4.3.19 Canadian programming expenditures (CPE) reported by the PPV and VOD services

Genre (\$ thousands)	Eligible Expenditures on Canadian Programming (CPE)		
	2009	2010	Growth
<i>Number of services reporting</i>	21	27	
Total PPV and VOD services	31,204	26,348	-18%

• Programming expenditures by genre for PPV and VOD services are not available.

• Excludes CTF “top-up” funding reported by PPV and VOD services. Includes expenditures relating to ownership transfer benefits and to commitments made at the time of licensing.

Source: CRTC data collection

Table 4.3.20 Number of hours of Canadian priority programming broadcast annually - 7 p.m. to 11 p.m.

This table sets out the number of hours of Canadian priority programming broadcast during the peak viewing period of 7 p.m. to 11 p.m. by CFTM-TV (TVA) Montréal, CFTO-TV (CTV) Toronto, and CIII-TV (Global) Toronto for each of the 2005/06 to 2009/10 broadcast years.

(hours)	Broadcast years*					Annual growth %			
	05/06	06/07	07/08	08/09	09/10	07	08	09	10
CFTM-TV (TVA) Montréal (French-language station)									
Long-form documentary (cat. 2b)	48	22	19	52	5	-55%	-14%	174%	-90%
Drama and comedy (cat. 7)	253	270	328	299	352	7%	21%	-9%	18%
Music and dance (cat. 8a)	24	6	8	7	7	-75%	33%	-13%	-
Variety (cat. 9)	65	10	8	40	9	-84%	-20%	400%	-78%
Regionally produced	-	-	-	6	-	-	-	-	-100%
Entertainment magazine	42	39	29	16	27	-7%	-26%	-45%	69%
Total hours	432	347	392	429	400	-20%	13%	13%	-7%
<i>Number of Drama and comedy hours reported as:</i>									
<i>eligible for the 50% time credit</i>	119	153***	142	159	155	29%	-7%	12%	-3%
<i>eligible for the 25% time credit</i>	-	-	-	-	-	-	-	-	-
<i>not eligible for the time credit</i>	135	117***	186	140	197	-13%	59%	-25%	41%
CFTO-TV (CTV) Toronto (English-language station)									
Long-form documentary (cat. 2b)	51	53	63	64	46	5%	19%	2%	-28%
Drama and comedy (cat. 7)	189	183**	204	168	194	-3%	12%	-18%	15%
Music and dance (cat. 8a)	2	2	1	21	7	-	-50%	2,000%	-67%
Variety (cat. 9)	32	30	26	30	26	-6%	-13%	15%	-13%
Regionally produced	2	2	2	-	2	-	-	-100%	-
Entertainment magazine	116	105	96	107	89	-9%	-9%	11%	-17%
Total hours	392	375	392	390	364	-4%	5%	5%	-7%
<i>Number of Drama and comedy hours reported as:</i>									
<i>eligible for the 50% time credit</i>	120	128	122	88	132	6%	-5%	-28%	50%
<i>eligible for the 25% time credit</i>	31	16	6	17	20	-48%	-63%	183%	18%
<i>not eligible for the time credit</i>	38	39	76	63	42	2%	95%	-17%	-33%
CIII-TV (Global) Toronto (English-language station)									
Long-form documentary (cat. 2b)	92	151	104	119	76	64%	-31%	14%	-36%
Drama and comedy (cat. 7)	161	147	207	163	200	-9%	41%	-21%	23%
Music and dance (cat. 8a)	1	-	1	-	-	-100%	-	-100%	-
Variety (cat. 9)	-	2	-	-	-	-	-	-	-
Regionally produced	4	12	3	12	14	166%	-75%	300%	17%
Entertainment magazine	71	127**	103	106	112	78%	-19%	3%	6%
Total hours	330	438	418	400	402	33%	-5%	-5%	1%
<i>Number of Drama and comedy hours reported as:</i>									
<i>eligible for the 50% time credit</i>	98	34	34	37	30	-65%	0%	9%	-19%
<i>eligible for the 25% time credit</i>	12	15	11	35	38	29%	-27%	218%	9%
<i>not eligible for the time credit</i>	51	97	162	91	132	90%	67%	-44%	45%

- * Reflects hours broadcast from 1 September to 31 August.
 - **Entertainment magazine programming hours in 06/07 include programming required to make up for 05/06 shortfall in qualifying *ET Canada* episodes.
 - The results are based on the definitions of priority programming that came into effect September 2000 (Public Notice CRTC 1999-205).
 - *** Reflects updated results
 - Minor variances are due to rounding.
- Source: Licensees

Table 4.3.21 Value of television transactions and corresponding tangible benefits for the period 1 April 2005 to 31 December 2010

(\$ millions)	English-language services			French-language services			Total benefits
	# of Trans.	Value of the transactions ¹	Benefits	# of Trans.	Value of the transactions ¹	Benefits	
1 Apr. 05 to 31 Mar. 06	5	18.0	1.8	-	-	-	1.8
1 Apr. 06 to 31 Dec. 06	3	7.0	0.7	-	-	-	0.7
1 Jan. 07 to 31 Dec. 07 ²	9	2,877.0	287.7	1	34.0	3.4	291.1
1 Jan. 08 to 31 Dec. 08	7	180.1	17.4	4	31.9 ³	0.20	17.6
1 Jan. 09 to 31 Dec. 09	7	54.8	5.8	0	-	-	5.8
1 Jan. 10 to 31 Dec. 10 ⁴	3	2,086.4	183.4	0	-	-	183.4
Total	34	5,223.3	496.8	5	65.9	3.6	500.4

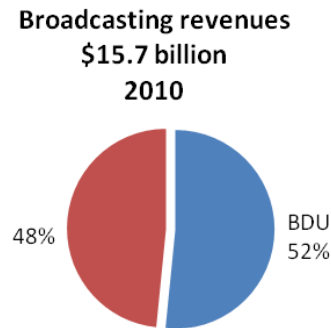
- Minor variances are due to rounding.
- 1. Value determined by the Commission for the purpose of calculating tangible benefits.
- 2. Three major ownership transactions (CTVglobemedia/CHUM, Rogers/CHUM's five Citytv stations and Canwest/Alliance Atlantis) (CRTC Broadcasting Decisions 2007-165, 2007-360 and 2007-429) resulted in \$286 million in tangible benefits.
- 3. Applicant was prepared to commit \$1 M in tangible benefits; however, the Commission exempted the applicant from paying the tangible benefits due to unprofitable operations (Broadcasting Decision 2008-129).
- 4. The Canwest/Shaw ownership transaction (Broadcasting Decision 2010-782) resulted in \$180.2 million in tangible benefits.

Source: CRTC Decisions and Administrative approvals

4.4 Broadcasting distribution market sector

Overview

Broadcasting distribution refers to the distribution of programming services by BDUs. This includes the distribution of programming from conventional television stations, radio stations, pay audio services, and pay, PPV, VOD and specialty television services. The sector consists of cable BDUs, IPTV providers, national DTH distributors, and MDS operators. The sector is dominated by 5 large companies utilizing either cable or satellite facilities, capturing over 91% of programming distribution revenues. Other services provided by the BDUs, such as Internet and telephony, are discussed in sections 3.1 and 5.3 of this report.



Broadcasting distribution sector at a glance

	2009	2010	% growth
Revenues (\$ billions)	7.4 #	8.1	8.9
Subscribers (millions)	11.2 #	11.5	2.5
Revenues per subscriber per month	\$56.18 #	59.73	6.3
Percent of households subscribing	90.0% #	91.0%	
Market share (subscriber)			
Top 4 major cable operators	64%	64%	
DTH operators	25%	25%	
Number of service providers			
Cable BDU	222	216	-3
IPTV	n.a.	19	n.a.
MDS	21	19	-10
DTH	2	2	0
Affiliation payments per subscription dollar	\$0.34	\$0.35	3
EBITDA Margin	24.3% #	25.1%	
Cable and IPTV	25.9%	25.6%	
DTH and MDS	20.8% #	23.9%	

- The number of BDU is comprised of approximately 109 systems with 20,000 subscribers or more and approximately 1,834 systems with fewer than 20,000 subscribers. Most systems with fewer than 20,000 subscribers are eligible for exemption from licensing requirements.
- The source for the number of operators is the September 2010, Mediastats and CRTC APP1205 report dated 29 June 2011.

Statistical Information - Broadcasting distribution undertakings
Table 4.4.1 Broadcasting distribution – Basic and non-basic revenues, subscribers, monthly revenues per subscriber, and percent of households subscribing to BDUs (Part 1 of 2)

	2006	2007	2008	2009	2010	CAGR 2006-2010
Revenues (\$ millions)						
Cable and IPTV	4,008.2	4,333.7	4,761.8	5,122.7	5,594.5	8.7%
<i>Percent of total</i>	69.2%	68.7%	68.8%	68.8%	69.0%	
<i>Annual Growth</i>	-	8.1%	9.9%	7.6%	9.2%	
DTH and MDS	1,641.1	1,834.1	2,036.2	2,195.6 #	2,385.3	9.8%
<i>Percent of total</i>	28.3%	29.1%	29.4%	29.5%	29.4%	
<i>Annual Growth</i>	-	11.8%	11.0%	7.8%	8.6%	
Reporting BDUs subtotal	5,649.3	6,167.7	6,798.0 #	7,318.3 #	7,979.8	9.0%
<i>Percent of total</i>	97.5%	97.8%	98.2%	98.3%	98.4%	
<i>Annual Growth</i>	-	9.2%	10.2%	7.7%	9.0%	
Non-reporting BDUs	144.2 #	139.9 #	122.4 #	126.2 #	126.2	-3.3%
<i>Percent of total</i>	2.5%	2.2%	1.8%	1.7%	1.6%	
<i>Annual Growth</i>	-	-3.0%	-12.5%	3.0%	0.0%	
Total revenues	5,793.5 #	6,307.6 #	6,920.4 #	7,444.5 #	8,106.0	8.8%
<i>Annual Growth</i>	9.0%	8.9%	9.7%	7.6%	8.9%	
Subscribers (thousands)						
Cable and IPTV	7,484.4	7,691.3	7,916.8	8,094.1 #	8,271.0	2.5%
<i>Percent of total</i>	71.0%	71.5%	72.1%	72.1%	71.9%	
<i>Annual Growth</i>	-	2.8%	2.9%	2.2%	2.2%	
DTH and MDS	2,627.7	2,631.0	2,699.5 #	2,760.9	2,862.1	2.2%
<i>Percent of total</i>	24.9%	24.5%	24.6%	24.6%	24.9%	
<i>Annual Growth</i>	-	0.1%	2.6%	2.3%	3.7%	
Reporting BDUs subtotal	10,112.0	10,322.3	10,616.3 #	10,854.9	11,133.1	2.4%
<i>Percent of total</i>	95.9%	95.9%	96.7%	96.7%	96.8%	
<i>Annual Growth</i>	-	2.1%	2.8%	2.2%	2.6%	
Non-reporting BDUs	428.5 #	438.0 #	361.6 #	371.2 #	371.2	-3.5%
<i>Percent of total</i>	4.1%	4.1%	3.3%	3.3%	3.2%	
<i>Annual Growth</i>	-	2.2%	-17.4%	2.6%	0.0%	
Total subscribers	10,540.5 #	10,760.3 #	10,977.9 #	11,226.1 #	11,504.3	2.2%
<i>Annual Growth</i>	3.3%	2.1%	2.0%	2.3%	2.5%	

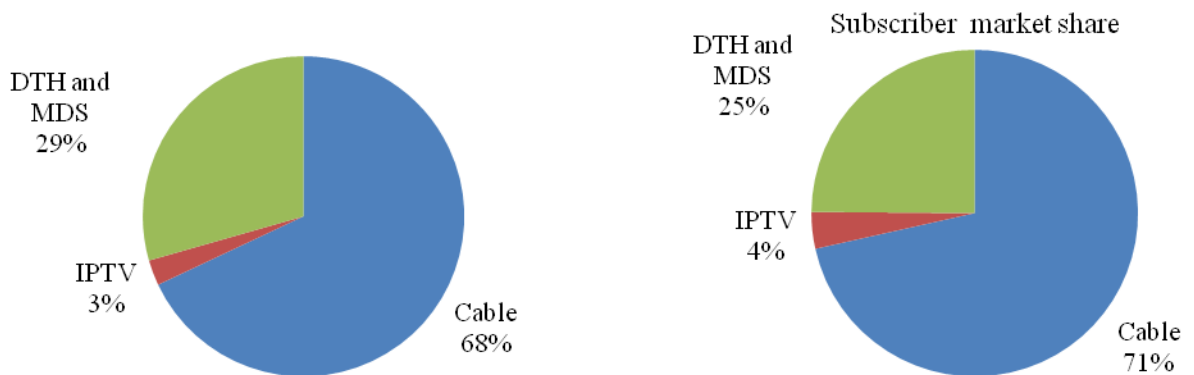
Table 4.4.1 Broadcasting distribution – Basic and non-basic revenues, subscribers, monthly revenues per subscriber and percent of households subscribing to BDUs (Part 2 of 2)

Monthly Revenues/Subscriber	2006	2007	2008	2009	2010	CAGR 2006-2010
Cable and IPTV	44.63	46.95	50.12	52.74 #	56.37	6.0%
Annual Growth	4.3%	5.2%	6.8%	5.2%	6.9%	
DTH and MDS	52.05	58.09	62.86	66.27 #	69.45	7.5%
Annual Growth	8.1%	11.6%	8.2%	5.4%	4.8%	
Reporting BDUs	46.56	49.79	53.36	56.18 #	59.73	6.4%
Annual Growth	5.3%	7.0%	7.2%	5.3%	6.3%	
Subscribing households	89.3%	88.7%	89.0%	90.0% #	91.0%	

- Revenue data is based on the 12-month period ending 31 August of each year. Number of subscribers is as of 31 August of each year.
- Non reporting BDU data based on estimates.
- Minor variances are due to rounding.

Source: CRTC data collection, Statistics Canada. Percent of households subscribing to BDUs: Statistics Canada, “Spending Patterns in Canada”, 62-202-X, 2010 for years 2006-2009, with CRTC projection for 2010

Figure 4.4.1 Percent of revenues and subscribers by type of distribution platform in 2010



Source: CRTC data collection

Table 4.4.2 Top Canadian distributors and number of subscribers (thousands)

Corporations	2007	2008	2009	2010	2011	CAGR 2007-2011
RCI ¹	2,278	2,295	2,312	2,296	2,303	0.3%
<i>Growth</i>	0.8%	0.7%	0.7%	-0.7%	0.3%	
Shaw ²	2,220	2,242	2,274	2,329	2,313	1.0%
<i>Growth</i>	1.9%	1.0%	1.4%	2.4%	-0.7%	
Videotron ¹	1,583	1,652	1,729	1,786	1,809	3.4%
<i>Growth</i>	4.1%	4.4%	4.7%	3.3%	1.3%	
Cogeco ²	855	859	868	874	881	0.8%
<i>Growth</i>	2.2%	0.5%	1.0%	0.7%	0.8%	
Subtotal - Cable	6,936	7,048	7,183	7,284	7,305	1.3%
<i>Growth</i>	2.1%	1.6%	1.9%	1.4%	0.3%	
Star Choice ^{2,3}	873	886	897	903	906	0.9%
<i>Growth</i>	1.3%	1.5%	1.2%	0.7%	0.4%	
BCE ^{1,4}	1,824	1,823	1,864	1,969	2,028	2.7%
<i>Growth</i>	4.9%	-0.1%	2.2%	5.6%	3.0%	
Subtotal – DTH and IPTV	2,697	2,709	2,761	2,872	2,934	2.1%
<i>Growth</i>	3.7%	0.4%	1.9%	4.0%	2.2%	
Total – Top Canadian distributors	9,633	9,757	9,944	10,156	10,240	1.5%
<i>Growth</i>	2.5%	1.3%	1.9%	2.1%	0.8%	
<i>% of All Subscribers</i>	90.6%	89.5%	89.1%	89.4%	n/a	

1. As of fiscal year ending 31 March each year

2. As of fiscal year ending 28 February each year

3. Star Choice Television Network Inc. is controlled by Shaw Communications Inc.

4. BCE includes Bell ExpressVu LLP, DTH and Bell Canada VDSL based IPTV.

Source: Corporate quarterly reports

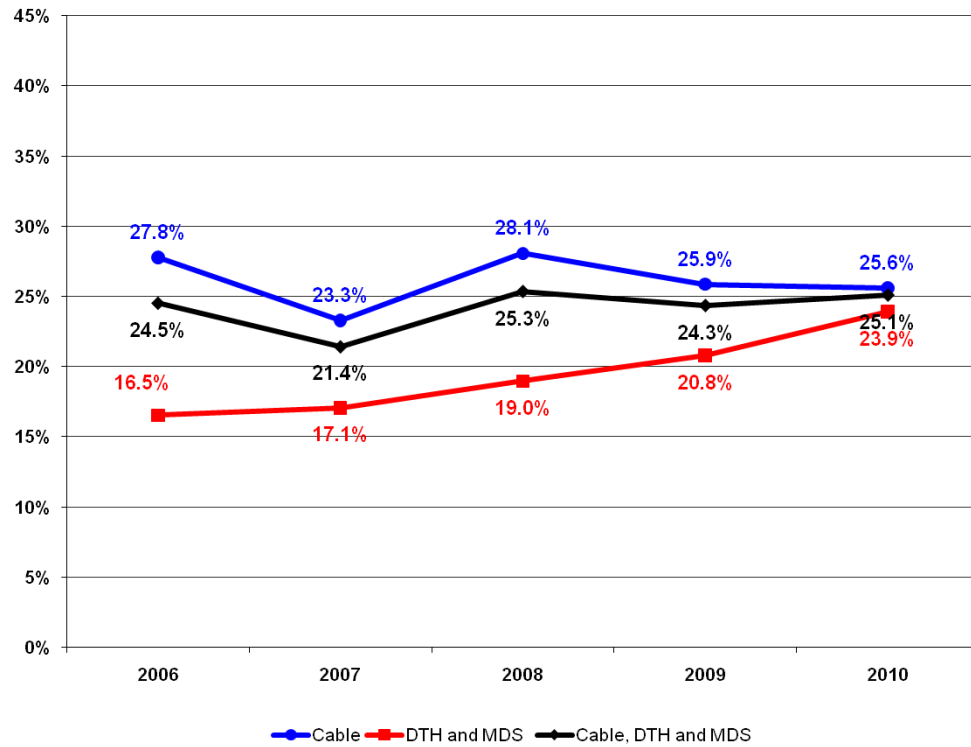
Table 4.4.3 Number of subscribers receiving digital services (thousands)

	Cable	DSL	Subtotal	DTH	MDS	Subtotal	Total
September 2010							
English-language	4,065.5	346.6	4,412.1		2.5		
French-language	1,432.1	13.6	1,445.7		4.2		
Total	5,497.6	360.2	5,858.0	2,903.2	6.6	2,909.9	8,767.9
<i>Percent growth</i>	20.5	20.2	20.5	5.6	-56.7	5.2	15.0
<i>% share of:</i>							
<i>Digital subscribers</i>	62.7	4.1	66.8	33.1	0.1	33.2	100.0
<i>All subscribers</i>	47.8	3.1	50.9	25.2	0.1	25.3	76.2
September 2009							
English-language	3,417.8	289.0	3,706.8		11.2		
French-language	1,143.7	10.5	1,154.3		4.1		
Total	4,561.5	299.6	4,861.2	2,749.5	15.4	2,764.9	7,626.1
<i>Percent growth</i>	16.0	41.6	17.3	3.7	-15.5	3.6	11.9
<i>% share of:</i>							
<i>Digital subscribers</i>	59.8	3.9	63.7	36.1	0.2	36.3	100.0
<i>All subscribers</i>	40.6	2.7	43.3	24.5	0.1	24.6	67.9
September 2008							
English-language	2,936.4	206.6	3,143.0		13.2		
French-language	996.2	4.9	1,001.1		5.0		
Total	3,932.6	211.5	4,144.3	2,651.8	18.2	2,670.0	6,814.3
<i>Percent growth</i>	17.5	21.9	17.7	-1.8	-21.8	-2.0	9.1
<i>% share of:</i>							
<i>Digital subscribers</i>	57.7	3.1	60.8	38.9	0.3	39.2	100.0
<i>All subscribers</i>	35.8	1.9	37.8	24.2	0.2	24.3	62.1
September 2007							
English-language	2,523.0	171.8	2,694.8		17.1		
French-language	825.3	1.8	827.0		6.2		
Total	3,348.3	173.5	3,521.9	2,700.5	23.2	2,723.8	6,245.7
<i>Percent growth</i>	12.6	34.8	13.5	1.6	-21.7	1.3	7.9
<i>% share of:</i>							
<i>Digital subscribers</i>	53.6	2.8	56.4	43.2	0.4	43.6	100.0
<i>All subscribers</i>	31.1	1.6	32.7	25.1	0.2	25.3	58.0
September 2006							
English-language	2,283.8	128.7	2,412.5		16.7		
French-language	689.2		689.2		13.0		
Total	2,973.0	128.7	3,101.8	2,658.3	29.7	2,688.1	5,789.9
<i>Percent growth</i>	13.0	42.5	14.0	5.7	-24.6	5.2	9.7
<i>% share of:</i>							
<i>Digital subscribers</i>	51.3	2.2	53.6	45.9	0.5	46.4	100.0
<i>All subscribers</i>	28.2	1.2	29.4	25.2	0.3	25.5	54.9

• English- and French-language DTH subscriber details are not available.

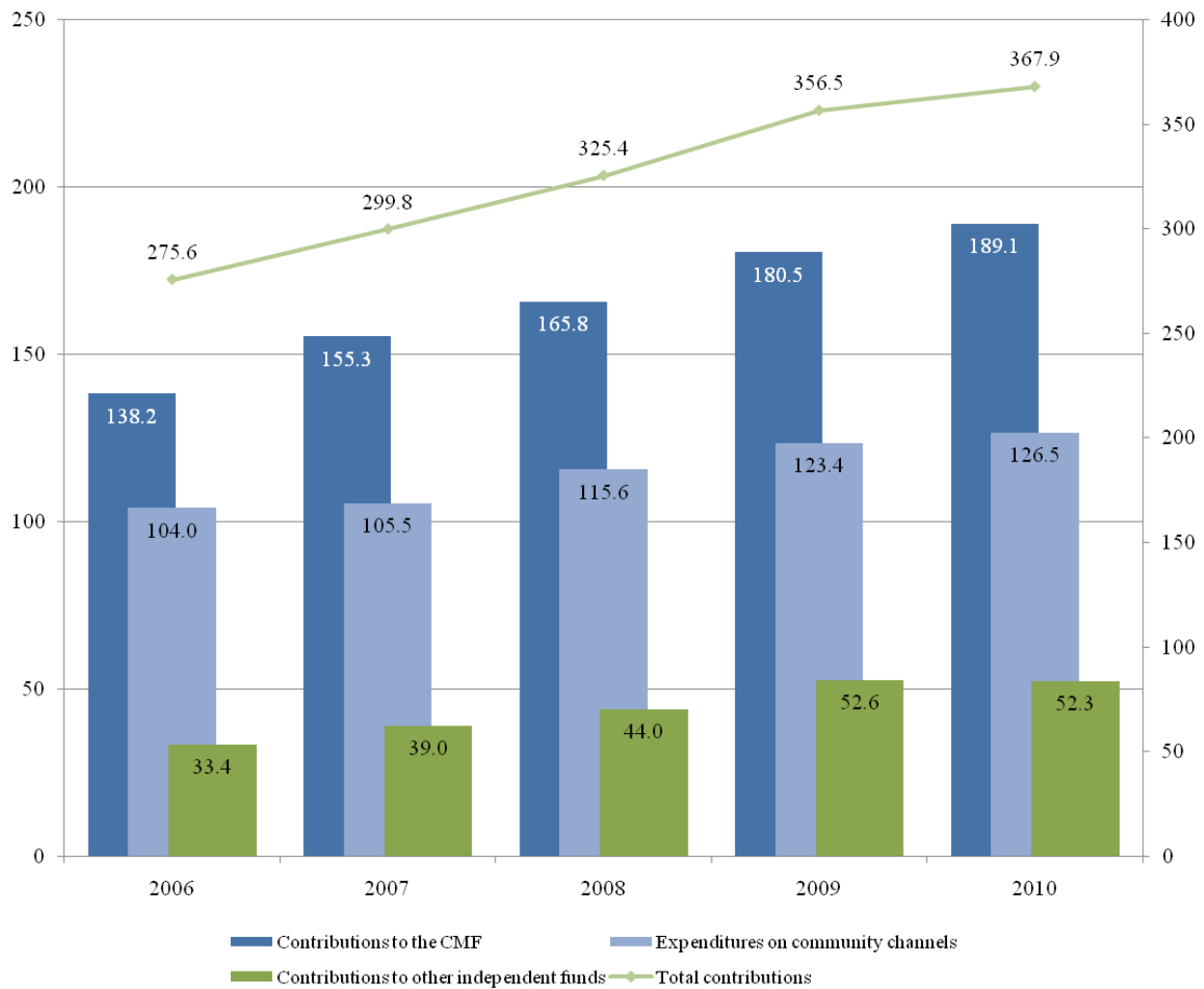
Source: Mediatats

Figure 4.4.2 EBITDA margins achieved from basic and non-basic programming services



- Based on the 12-month period ending 31 August
 - Figures may have been restated for the years 2006-2009s.
- Source: CRTC data collection

Figure 4.4.3 Contributions to the CMF, other independent industry funds and expenditures on local expression (community channels) reported by BDUs (\$ millions)



- Based on the 12-month period ending 31 August.
 - Minor variances are due to rounding.
 - BDU contributions include contributions reported by cable, DTH, MDS, as well as SRDU.
- Source: CRTC data collection

Table 4.4.4 Number of cable undertakings contributing to community channels

This table outlines the number of Class 1 licensees that have reported community channel expenses between 2006 and 2010. The figures do not necessarily represent the actual number of community channels in operation, as some channels are funded by more than one undertaking.

	2006	2007	2008	2009	2010
Class 1	134	131	139	131	121

- Based on 31 August of each year
- Source: CRTC data collection

Table 4.4.5 Affiliation payments made to Canadian and non-Canadian pay, PPV, VOD, and specialty services reported by BDUs

(\$ millions)	2006	% of total	2007	% of total	2008	% of total	2009	% of total	2010	% of total	% annual incr. / decr.			
											2007	2008	2009	2010
Payments to Canadian affiliates														
Cable														
Total	1,091	88%	1,182	86%	1,304	86%	1,473	88%	1,629	87%	8%	10%	13%	11%
DTH and MDS														
Total	568	92%	639	92%	678	92%	738	91%	819	92%	12%	6%	9%	11%
Combined: Cable, DTH and MDS														
Pay	415	94%	507	95%	541	94%	596	94%	643	93%	22%	7%	10%	8%
Specialty	1,245	87%	1,314	85%	1,441	85%	1,616	87%	1,804	87%	6%	10%	12%	12%
Total	1,659	89%	1,821	88%	1,982	88%	2,211	89%	2,447	89%	10%	9%	12%	11%
Payments to Non-Canadian affiliates														
Cable														
Total	152	12%	196	14%	219	14%	207	12%	242	13%	29%	12%	-5%	17%
DTH and MDS														
Total	52	8%	57	8%	63	8%	70	9%	75	8%	11%	9%	11%	8%
Combined: Cable, DTH and MDS														
Pay	25	6%	28	5%	32	6%	38	6%	46	7%	13%	16%	17%	20%
Specialty	179	13%	225	15%	249	15%	238	13%	271	13%	26%	11%	-4%	14%
Total	204	11%	253	12%	281	12%	276	11%	317	11%	24%	11%	-2%	15%
Total affiliate payments														
Cable														
Total	1,243	67%	1,378	66%	1,523	67%	1,680	68%	1,871	68%	11%	11%	10%	11%
DTH and MDS														
Total	620	33%	697	34%	741	33%	807	32%	894	32%	12%	6%	9%	11%
Combined: Cable, DTH and MDS														
Pay	439	24%	535	26%	574	25%	634	25%	689	25%	22%	7%	10%	9%
Specialty	1,424	76%	1,539	74%	1,690	75%	1,854	75%	2,076	75%	8%	10%	10%	12%
Total	1,863	100%	2,074	100%	2,264	100%	2,487	100%	2,765	100%	11%	9%	10%	11%

• Based on 31 August of each year.
Source: CRTC data collection

4.5 New media market sector

Overview

Broadcasting in new media involves the migration of digital broadcasting content to mobile and Internet distribution platforms. These platforms are providing Canadians with new programming experiences ranging from services resembling those of television and radio to new, highly interactive services or programs offering greater consumer control and choice.

This section examines this migration as well as the resulting consumer behaviour. It also looks at certain technologies as they relate to Canada's broadcasting and telecommunications sectors. As this is a growing and evolving industry, data contained in this section was gathered primarily from contracted research and publicly available data rather than industry questionnaires. One of the primary data sources was the MTM 2010-2011 survey, which examined the media habits and technology usage of 12,000 Canadians, 18 years of age and older.

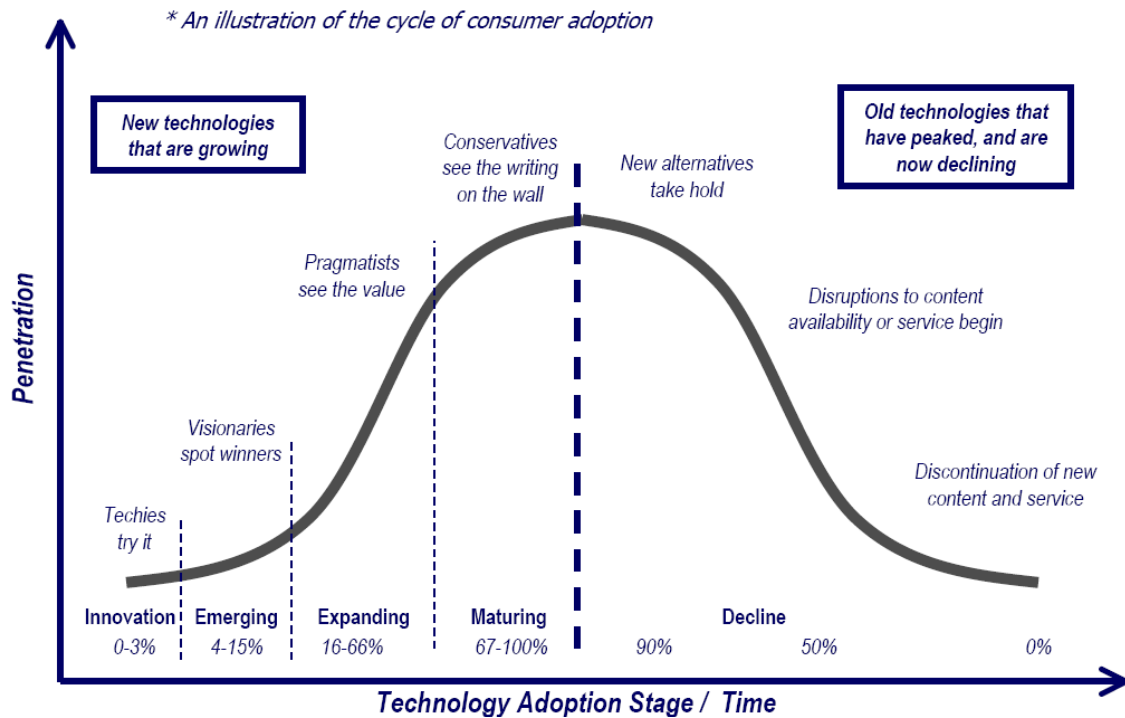
The Commission monitors broadcasting in new media through various means, including the introduction of reporting requirements in 2010 for new media broadcasting undertakings. With the assistance of an industry working group, the Commission developed basic reporting requirements respecting revenues and expenditures for broadcasting related activities in the new media environment. The reporting requirements will continue to be refined and developed in the coming year with the intent of developing a recurring set of data which can be collected each year to present a picture of the broadcasting in new media industry in Canada.

Fixed broadband is available to over 96% of households and mobile broadband (i.e., HSPA+) is available to over 96% of households. Canadians are increasingly demanding access to content, whether audio, video, or data. Spurring this development is the availability of multi-function consumer devices. New media services are generally in the innovation, emerging or expanding stage of the product life cycle.

One indicator for the importance of new media and its role in the lives of Canadians is the level of technology adoption by Canadians. Legacy technologies which have been in use for a decade or more, such as VCR players and portable radios, demonstrate near-ubiquity in Canadian households. However, there are many new devices which allow users to more fully use new media broadcasting offerings, and the adoption rate of these devices and services is a good indicator of the usage of these new platforms.

Statistical Information – New Media

Figure 4.5.1 Cycle of consumer adoption / Product life cycle



Source: MTM 2010-2011

Table 4.5.1 Website visits by Canadian unique visitors

	Unique Visitors (thousands)				Growth Feb 08- Feb 11	Total Minutes (millions)				Growth Feb 08- Feb 11
	Feb 08	Feb 09	Feb 10	Feb 11		Feb 08	Feb 09	Feb 10	Feb 11	
Total Internet	23,814	24,143	24,638	25,037	5.1%	63,578	62,544	61,308	59,178	-6.9%

Source: ComScore MediaMetrix

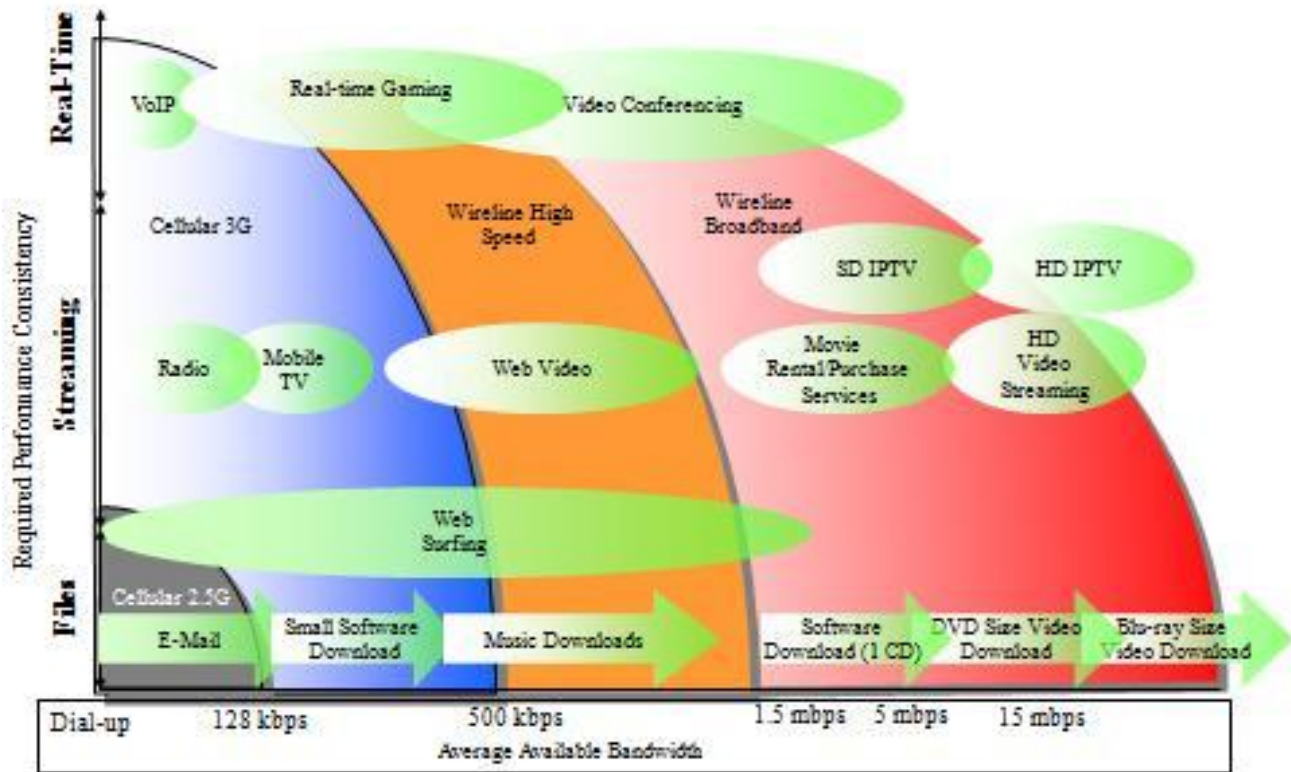
Table 4.5.2 Canadian Internet usage by linguistic group

	2003		2005		2007		2009		2010	
	Anglo	Franco	Anglo	Franco	Anglo	Franco	Anglo	Franco	Anglo	Franco
Overall Usage	68%	58%	77%	65%	81%	71%	83%	76%	86%	79%
18-34	84%	79%	91%	86%	95%	91%	94%	93%	96%	97%
35-49	78%	66%	84%	76%	89%	84%	91%	88%	92%	90%
50+	48%	34%	60%	43%	66%	51%	69%	59%	74%	63%

• Note: Usage in past month

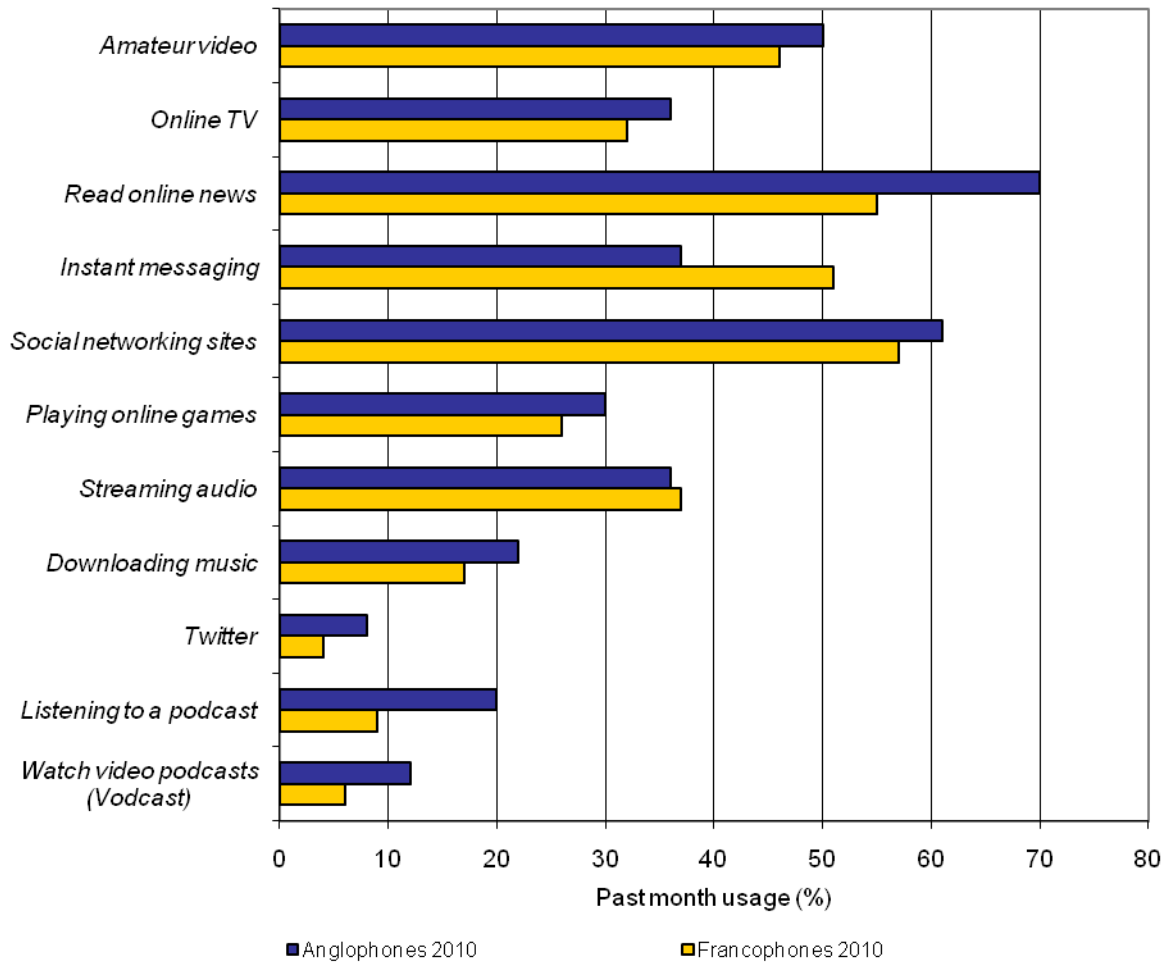
Source: MTM 2010-2011 (Respondents: All 18+)

Figure 4.5.2 Internet applications – bandwidth requirements



Source: CRTC

Figure 4.5.3 Popular Internet activities for Canadian Internet users



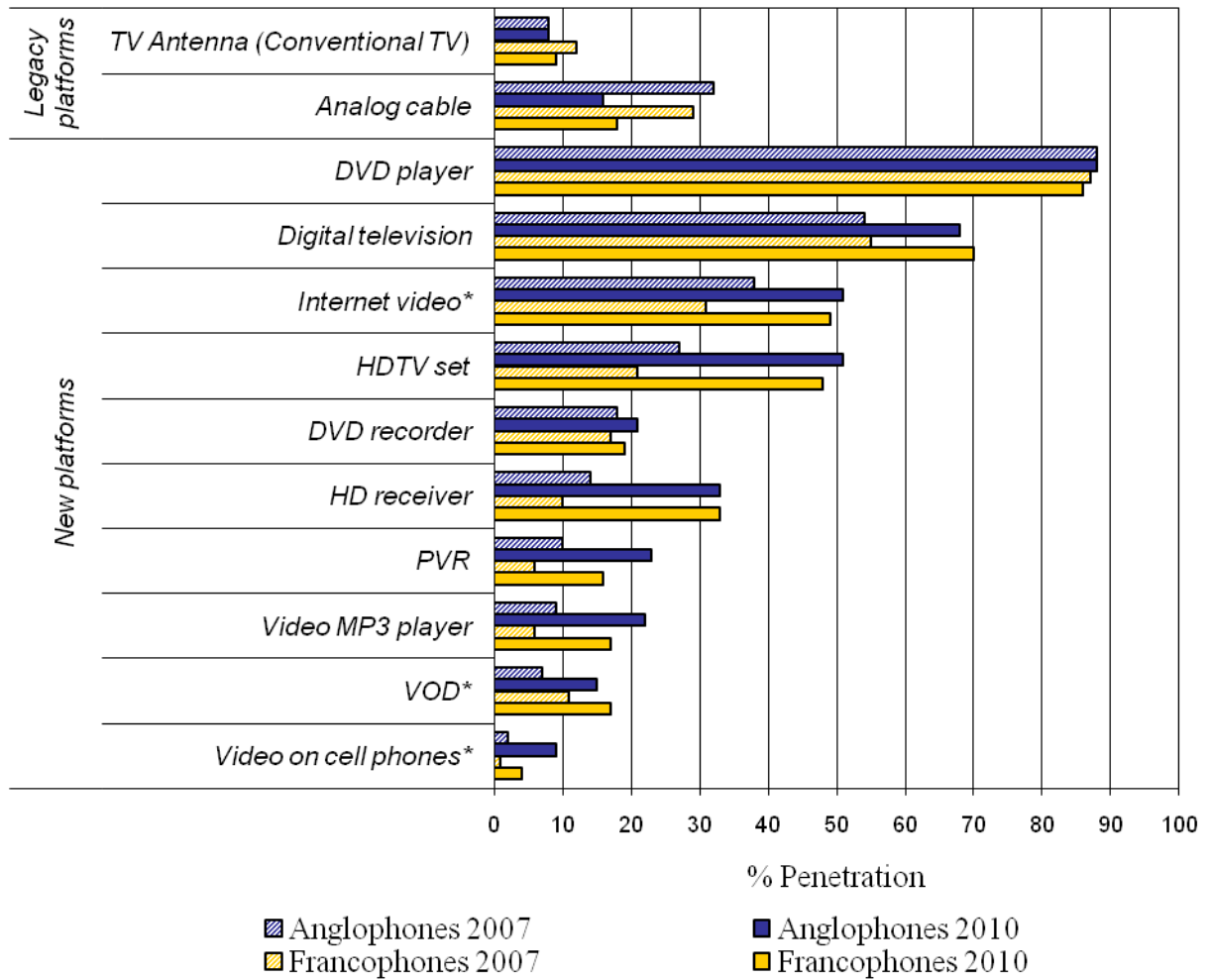
• Usage in past month
 Source: MTM 2010-2011 (Respondents: Internet Users 18+)

Table 4.5.3 Average weekly hours spent online by Canadians Internet users

	1997	1999	2002	2005	2007	2008	2009	2010
Anglophone	4.8	5.6	9.3	11.7	13.4	13.8	14.5	17.1
Francophones	4.1	6.3	7.7	9.1	9.8	11.1	11.8	12.7

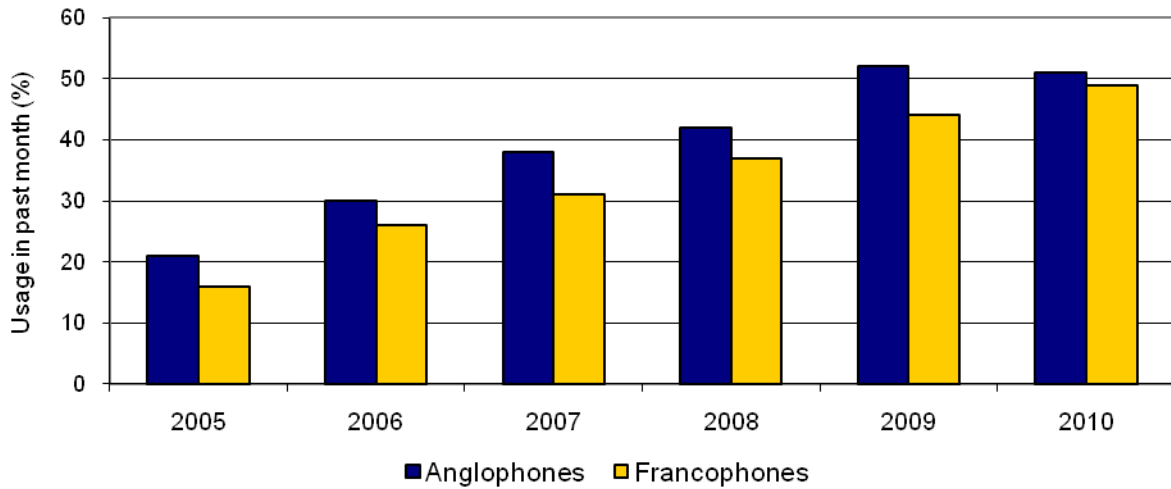
• Usage in past month usage
 Source: MTM 2010-2011 (Respondents: Internet Users 18+)

Figure 4.5.4 Video technology penetration in Canada



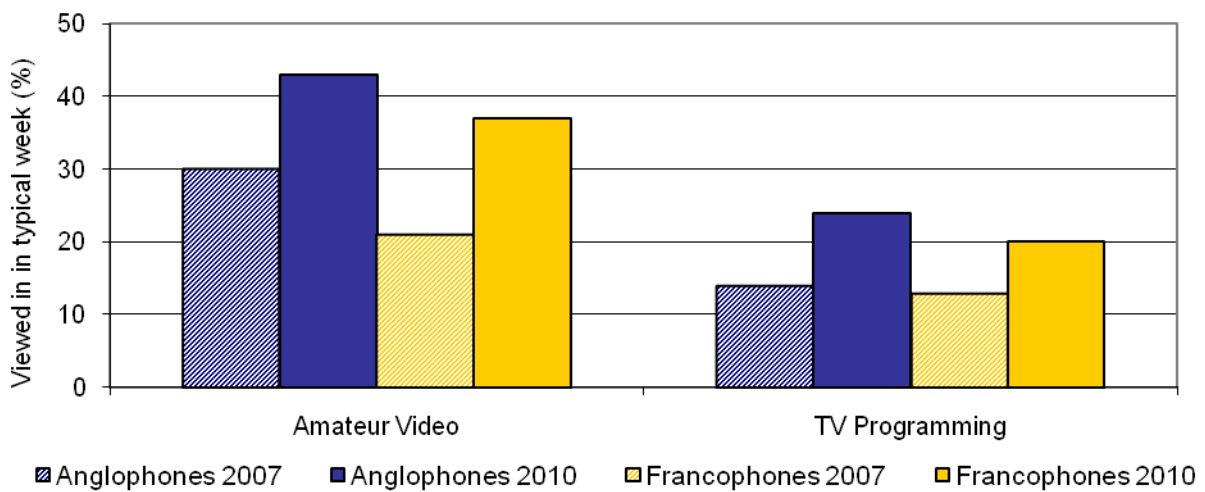
* Usage in past month usage
 Source: MTM 2010-2011 (Respondents: All)

Figure 4.5.5 Canadian Internet video viewing, by language

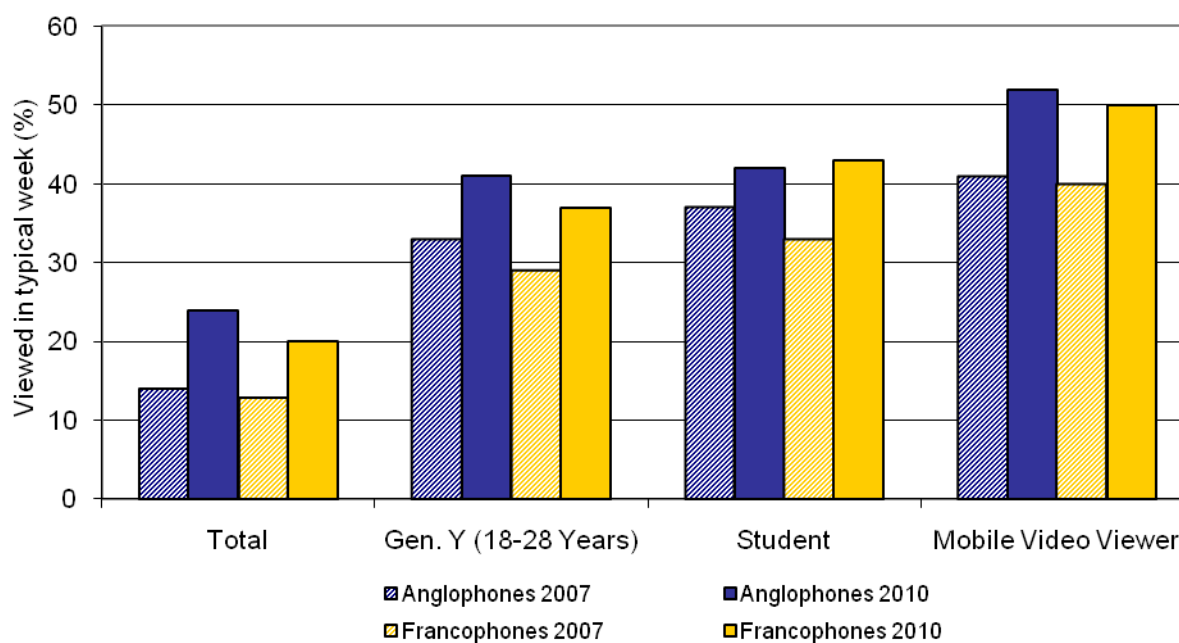


- Watched video available on the Internet such as TV program, newscast or amateur video clip in the past month.
- Source: MTM 2010-2011 (Respondents: All 18+)

Figure 4.5.6 Canadian Internet video viewing, by type



- TV Programming includes viewing a TV program, newscast or clip from a TV program available on the Internet
 - Viewing of Internet TV in a typical week
 - Video viewing of amateur video in the past month
- Source: MTM 2010-2011 (Respondents: All 18+)

Figure 4.5.7 Penetration of Internet TV viewers, by selected demographic groups


- TV watched on the Internet in a typical week
 - Mobile video viewer on a cell phone viewing TV programs, newscasts or amateur video clips in the past month.
- Source: MTM 2010-2011 (Respondents: All 18+)

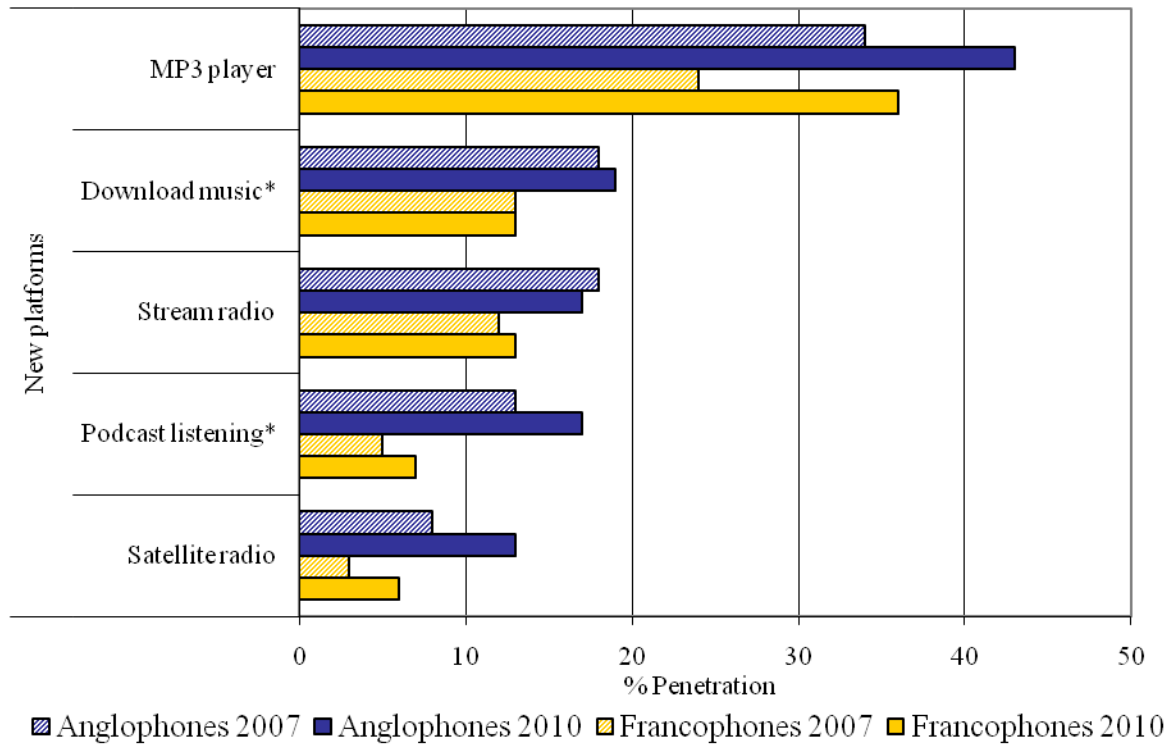
Table 4.5.4 Adoption and growth rate of various video technologies in Canada

	Adoption					Growth				
	2006	2007	2008	2009	2010	2006	2007	2008	2009	2010
PVR										
Anglophones	6%	10%	13%	18%	23%	50%	67%	30%	38%	28%
Francophones	4%	6%	10%	13%	16%	100%	50%	67%	30%	23%
Video on Demand*										
Anglophones	6%	7%	9%	12%	15%	20%	17%	29%	33%	25%
Francophones	7%	11%	12%	14%	17%	75%	57%	9%	17%	21%
Internet Video*										
Anglophones	30%	38%	42%	52%	51%	43%	27%	11%	24%	-2%
Francophones	26%	31%	37%	44%	49%	63%	19%	19%	19%	11%
Video on Cellphone*										
Anglophones	-	2%	5%	5%	9%	-	-	150%	0%	80%
Francophones	-	1%	2%	2%	4%	-	-	100%	0%	100%

* Usage in past month

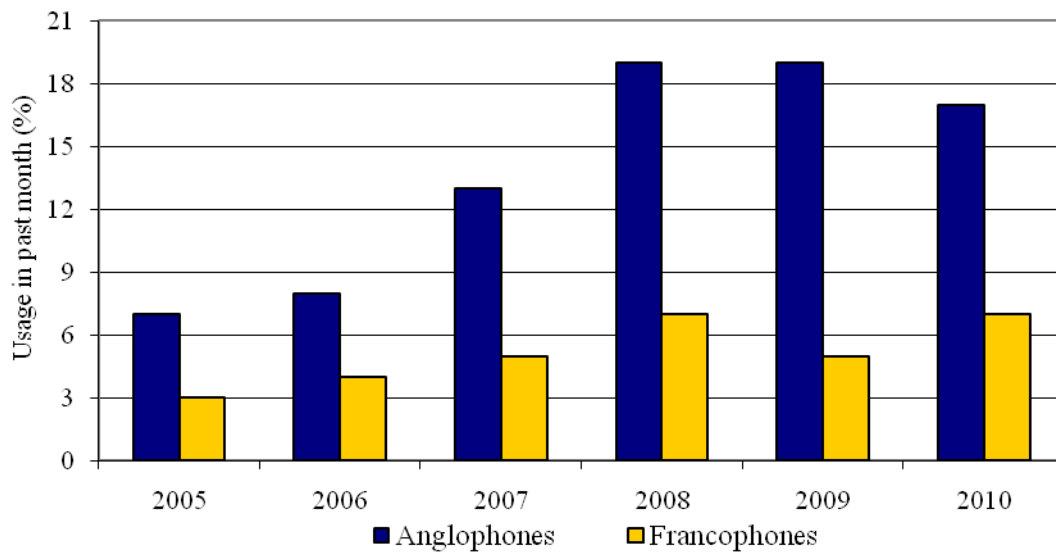
Source: MTM 2010-2011 (Respondents: All 18+)

Figure 4.5.8 Audio technology (excluding conventional radio) penetration in Canada



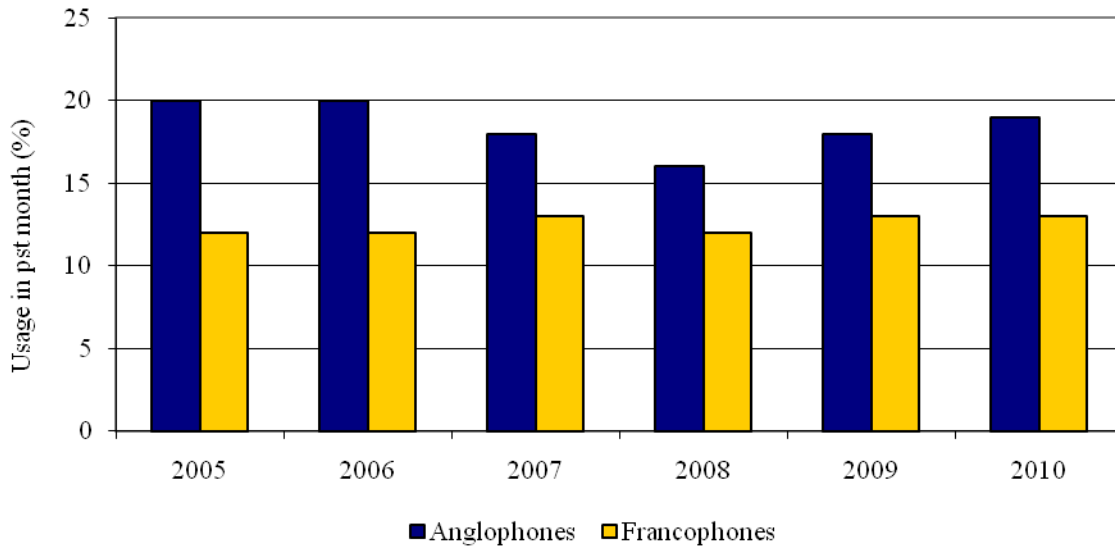
* Usage in past month
 Source: MTM 2010-2011 (Respondents: All 18+)

Figure 4.5.9 Podcast usage in Canada



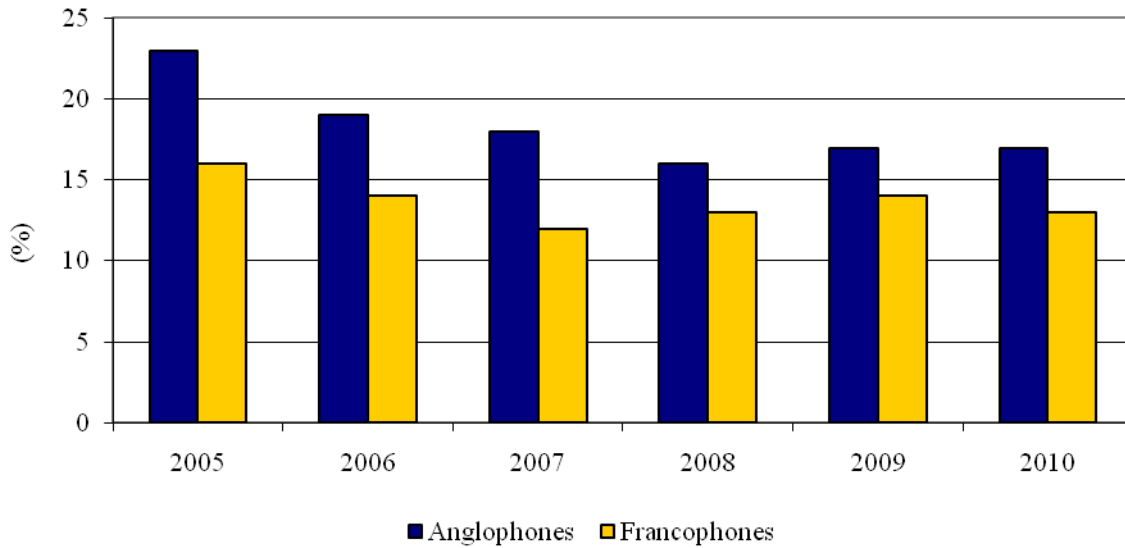
Source: MTM 2010-2011 (Respondents: All 18+)

Figure 4.5.10 Downloading Music in Canada



Source: MTM 2010-2011 (Respondents: All 18+)

Figure 4.5.11 Streaming radio in Canada



- In this graph streaming radio is the proportion of Canadians that stream AM/FM radio stations.
- 2005 and 2006 based on past month users and 2007 to 2010 based on typical week user.

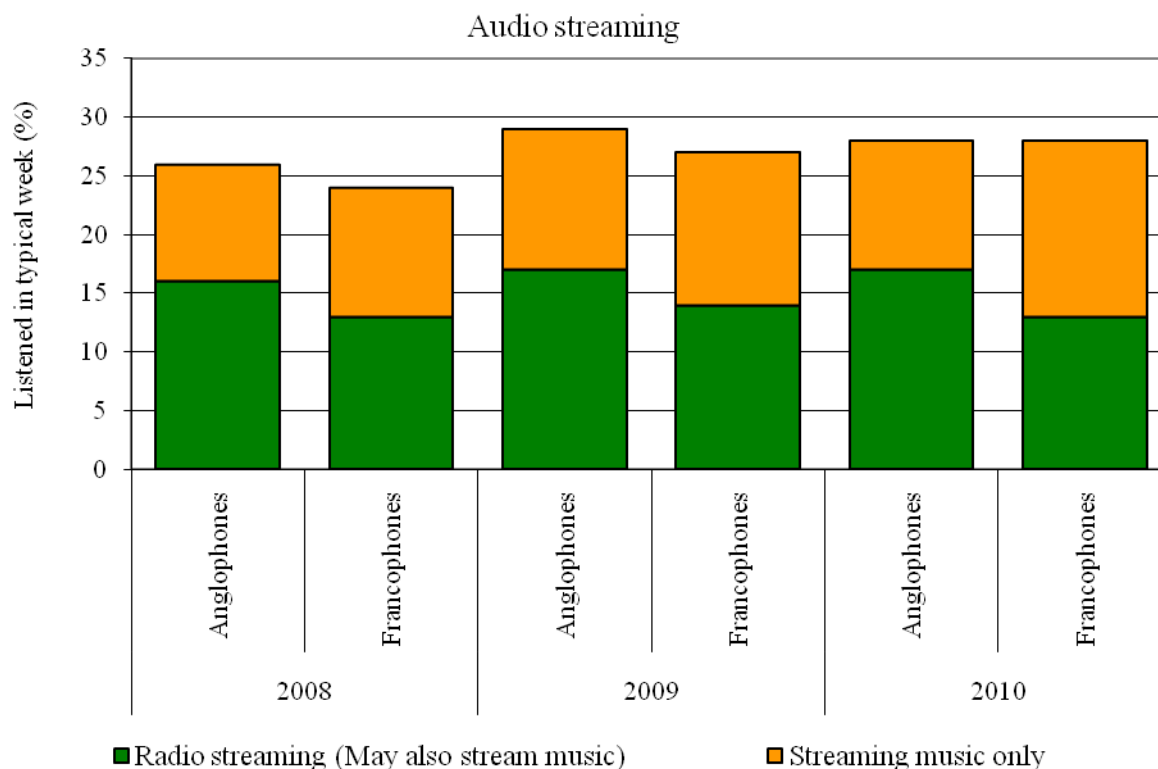
Source: MTM 2010-2011 (Respondents: All 18+)

Table 4.5.5 Adoption and growth rates of various audio technologies in Canada

	Adoption					Growth				
	2006	2007	2008	2009	2010	2006	2007	2008	2009	2010
MP3 player ownership										
Anglophones	29%	34%	39%	44%	43%	26%	17%	15%	13%	-2%
Francophones	19%	24%	30%	31%	36%	36%	26%	25%	3%	16%
Podcast listening										
Anglophones	8%	13%	19%	19%	17%	14%	63%	46%	0%	-11%
Francophones	4%	5%	7%	5%	7%	33%	25%	40%	-28%	40%
Music downloading										
Anglophones	20%	18%	16%	18%	19%	0%	-10%	-11%	13%	6%
Francophones	12%	13%	12%	13%	13%	0%	8%	-8%	8%	0%
Streaming radio*										
Anglophones	19%	18%	16%	17%	17%	-17%	-5%	-11%	6%	0%
Francophones	14%	12%	13%	14%	13%	-13%	-14%	8%	8%	-7%

* Usage in a typical week

Source: MTM 2007, 2008, 2009, 2010 and 2010-2011 (Respondents: All 18+)

Figure 4.5.12 AM/FM broadcasters as a source of audio material in streaming audio


Source: MTM 2010-2011 (Respondents: All 18+)

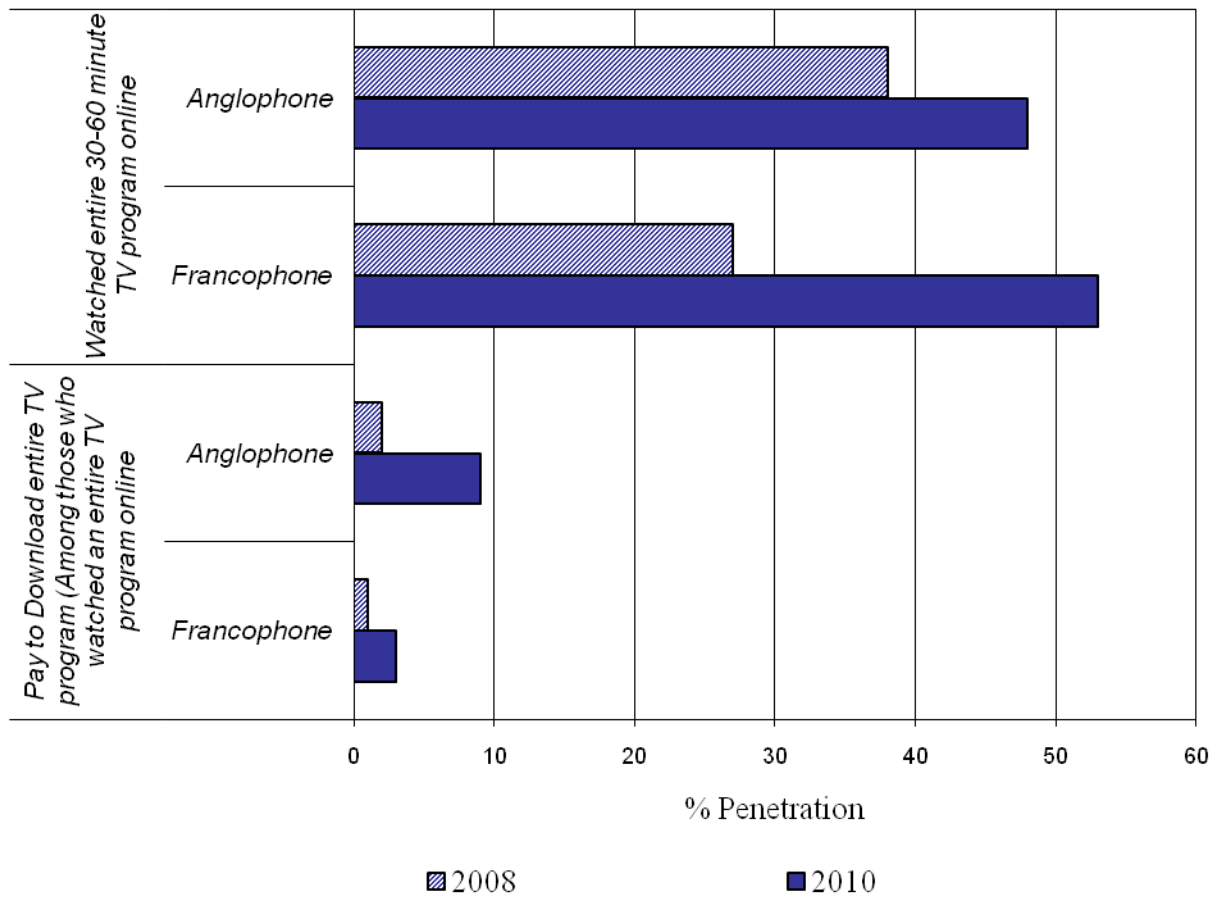
Table 4.5.6 Time spent by Canadian adopters using various technologies

	Hours per week			
	2007	2008	2009	2010
Internet Usage				
Anglophones	13.4	13.8	14.5	17.1
Francophones	9.8	11.1	11.8	12.7
Online TV Viewing*				
Anglophones	2.1	1.5	2.2	2.6
Francophones	1.3	1.2	1.3	1.5
Streaming Online Audio				
Anglophones	6.0	5.3	5.5	6.1
Francophones	5.7	5.4	5.3	5.3
Streaming Online AM/FM Radio				
Anglophones	4.8	4.2	4.1	4.8
Francophones	5.3	4.6	4.6	4.8
Podcasting AM/FM Radio				
Anglophones	2.2	2.2	2.2	2.2
Francophones	2.6	2.5	2.0	2.9
Listening to Audio on iPod / MP3				
Anglophones	6.7	7.1	7.0	7.6
Francophones	5.7	5.6	7.0	6.0
Satellite Radio Listening				
Anglophones	11.0	9.7	10.1	8.4
Francophones	11.0	10.7	10.5	5.6

* Usage in a typical week

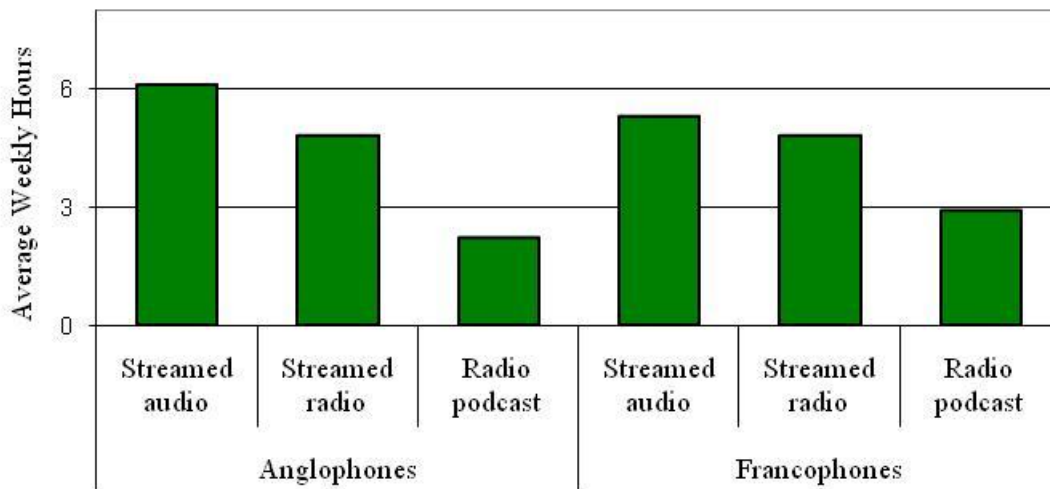
Source: MTM 2007, 2008, 2009, 2010 and 2010-2011 (Respondents: past month users of each listed technology 18+)

Figure 4.5.13 Percent of Internet TV viewers of full-length TV programs



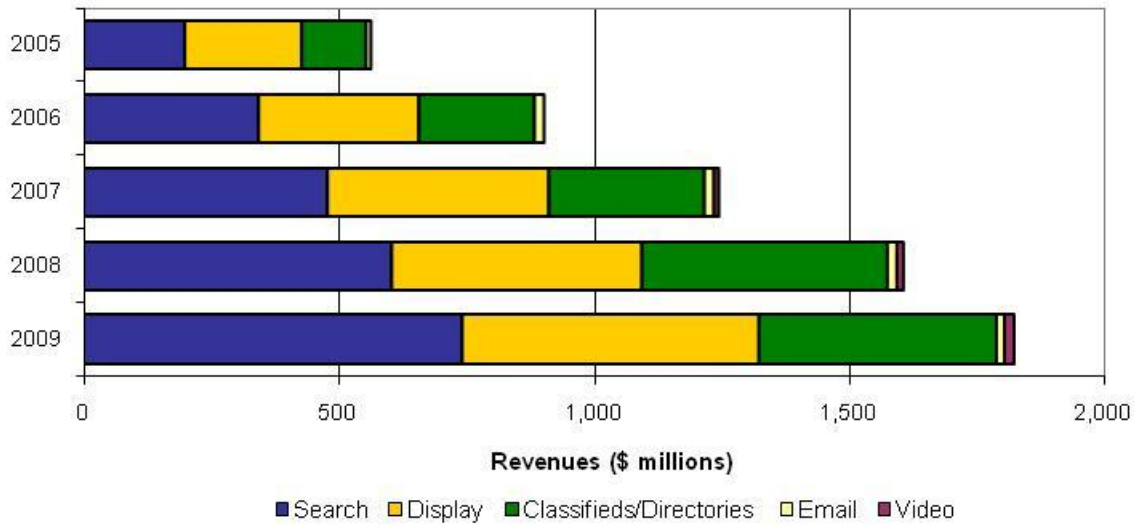
Source: MTM 2010-2011 (Respondents: All 18+)

Figure 4.5.14 Average weekly hours Canadians spend listening to streamed audio and radio podcasts



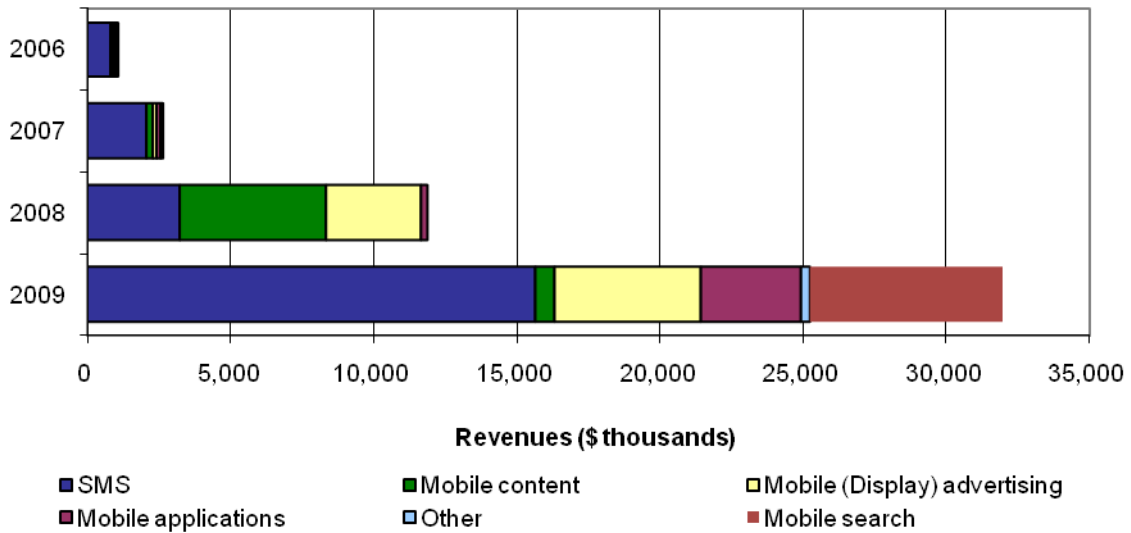
• Usage in past month
 Source: MTM 2010-2011 (Respondents: All 18+)

Figure 4.5.15 Canadian online advertising revenues



• 2010 figures not available at time of printing
Source: IAB Canada

Figure 4.5.16 Canadian mobile advertising revenues



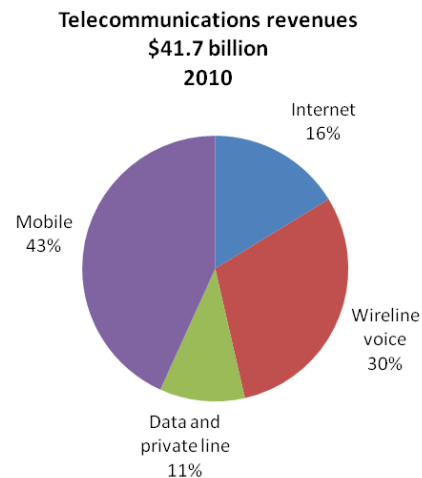
• 2010 figures not available at time of printing
Source: IAB Canada

5.0 Telecommunications

5.1 Financial review

The Canadian telecommunications service industry is dominated by a 10 large companies that collectively, with their affiliates, account for 95% of Canadian telecommunications revenues. The vast majority of the remaining entities are small entities with revenues of less than \$5 million.

In 2010, companies operating in all six markets of the telecommunications service industry (i.e. local and access, long distance, Internet, data, private line, and wireless) accounted for approximately 91% of Canadian telecommunications revenues. Companies operating in only one market sector accounted for 1% of revenues.



This section provides a broad overview of the financial performance of the telecommunications service industry and examines various financial indicators such as revenue trends by market sector and by type of service provider, profitability, market share, capital intensity, average revenues per line, and penetration rates.

Telecommunications service industry at a glance

	2009	2010	% Growth
Telecommunications revenues (\$ billions)	41.0	41.7	1.8
Percentage of total telecommunications revenues			
Top 5 ILECs	66	66	0.0
Top 5 cable companies	28	29	3.5
Top 5 resellers	2	2	0
Capex expenditures (\$ billions)			
Wireline	5.7	6.6	14.2
Wireless	2.2	1.8	-18.9
EBITDA margin (%)			
Wireline	24	21	-12.0
Wireless	43	41	-3.9
Average retail revenues per subscriber per month ¹ (\$/subscriber/month)			
Wireless	59	58	-1.6

1. Average retail revenues per subscriber per month are obtained by dividing total retail revenues by the total number of retail subscribers by 12.
Source: CRTC data collection

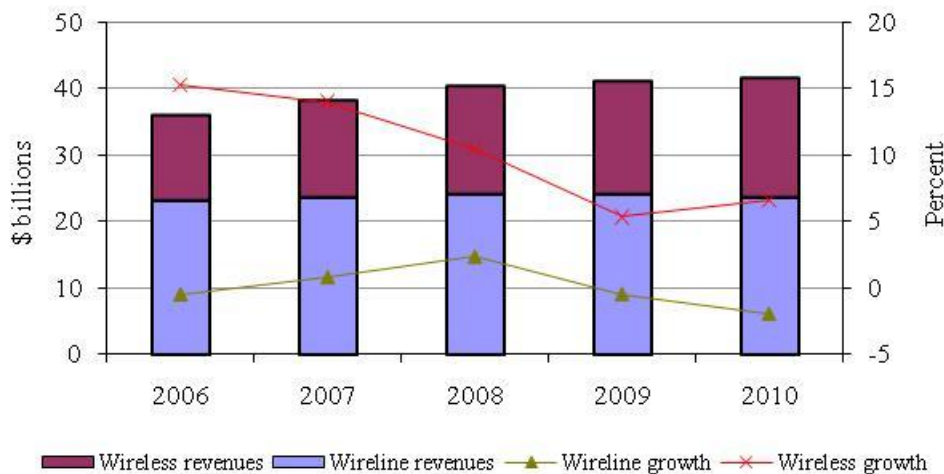
Statistical information – Telecommunications

Table 5.1.1 Retail and wholesale telecommunications revenues¹ (\$ billions)

	2006	2007	2008	2009	2010	CAGR 2006-2010
Wireline						
Retail	20.5	20.8	21.1 #	21.0 #	20.6	0.1%
Annual growth	-0.7%	1.5%	1.2% #	-0.4% #	-1.8%	
Wholesale	2.8 #	2.8 #	3.1	3.1	3.1	1.9%
Annual growth	0.2% #	-0.4% #	10.1%	-1.3%	-0.3%	
Wireline total	23.4 #	23.6 #	24.2 #	24.0 #	23.7	0.3%
Annual growth	-0.5% #	1.2% #	2.2% #	-0.5% #	-1.6%	
Wireless						
Retail	12.2	14.0	15.6	16.3	17.5	9.4%
Annual growth	12.1%	14.6%	11.1%	4.9%	7.2%	
Wholesale	0.5	0.5	0.5	0.5	0.5	1.2%
Annual growth	n.m.	9.5%	-8.0%	19.3%	-12.9%	
Wireless total	12.7	14.7	16.0	16.9	18.0	9.1%
Annual growth	15.2%	15.5%	9.3%	5.3%	6.6%	
Retail total	32.7	34.8	36.6 #	37.3 #	38.1	3.9%
Annual growth	3.8%	6.4%	5.2% #	1.8% #	2.2%	
Wholesale total	3.3 #	3.3 #	3.6	3.6	3.5	1.5%
Annual growth	12.7% #	-0.2% #	7.4%	1.4%	-2.2%	
Total	36.1 #	38.2 #	40.3 #	41.0 #	41.7	3.7%
Annual growth	4.5% #	5.8% #	5.4% #	1.8% #	1.8%	

1. Estimates were used to capture the retail and wholesale revenues of the smaller TSPs that were not required to complete data forms. These estimates are based on the information TSPs provided in their registration forms. Source: CRTC data collection

Figure 5.1.1 Telecommunications revenues and annual growth



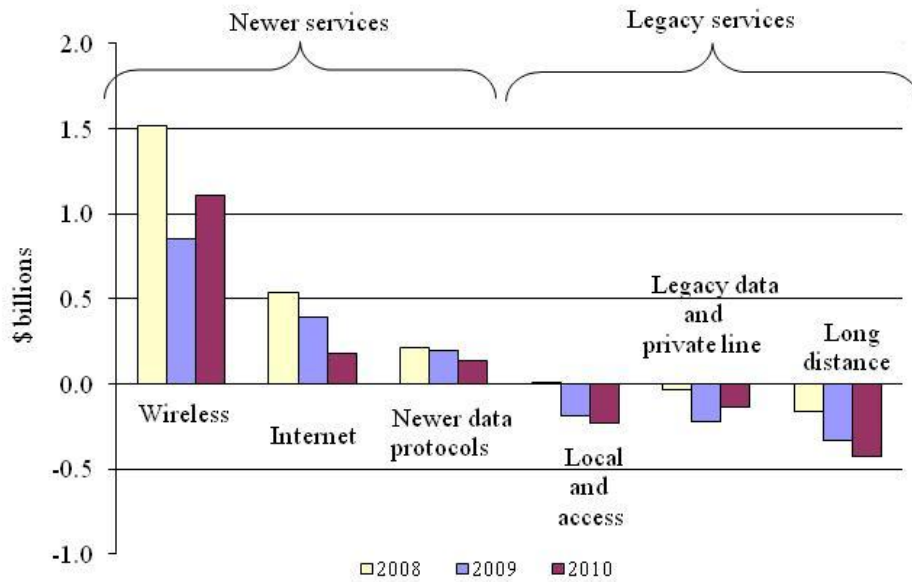
Source: CRTC data collection

Table 5.1.2 Telecommunications revenues, by market sector (\$ billions)

	2006	2007	2008	2009	2010	CAGR 2006-2010
Wireline						
Local and access	9.6	9.5	9.6	9.4	9.1	-1.3%
<i>Annual growth</i>	-1.5%	-0.8%	0.1%	-1.9%	-2.7%	
Long distance	4.7	4.3	4.2	3.9	3.4	-7.8%
<i>Annual growth</i>	-7.2%	-8.9%	-3.8%	-7.1%	-11.0%	
Voice subtotal	14.4	13.9	13.7	13.2	12.6	-3.3%
<i>Annual growth</i>	-3.4%	-3.5%	-1.1%	-3.5%	-5.0%	
Internet	5.0 #	5.6 #	6.1 #	6.5 #	6.8	7.9%
<i>Annual growth</i>	11.0% #	12.3% #	9.1% #	6.1% #	4.2%	
Data and private line						
Newer data protocols	1.0 #	1.3 #	1.5 #	1.7 #	1.8	15.3%
<i>Annual growth</i>	56.5% #	24.2% #	15.1% #	14.4% #	8.2%	
Legacy data, private line and other	2.9 #	2.9 #	2.8 #	2.6 #	2.5	-4.1%
<i>Annual growth</i>	-14.6% #	-2.3% #	-0.4% #	-8.3% #	-5.3%	
Data and private line total	4.0 #	4.2 #	4.3 #	4.3 #	4.3	2.1%
<i>Annual growth</i>	-3.0% #	4.6% #	4.4% #	-0.5% #	0.0%	
Non-voice subtotal	9.0 #	9.8 #	10.5 #	10.8 #	11.1	5.3%
<i>Annual growth</i>	4.5% #	8.4% #	7.1% #	3.4% #	2.5%	
Wireline total	23.4 #	23.6 #	24.2 #	24.0 #	23.7	0.3%
<i>Annual growth</i>	-0.5% #	1.1% #	2.3% #	-0.5% #	-1.6%	
Wireless	12.7	14.5	16.0	16.9	18.0	9.1%
<i>Annual growth</i>	15.2%	14.4%	10.4%	5.3%	6.6%	
Total	36.1 #	38.1 #	40.2 #	40.9 #	41.7	3.7%
<i>Annual growth</i>	4.5% #	5.8% #	5.4% #	1.8% #	1.8%	

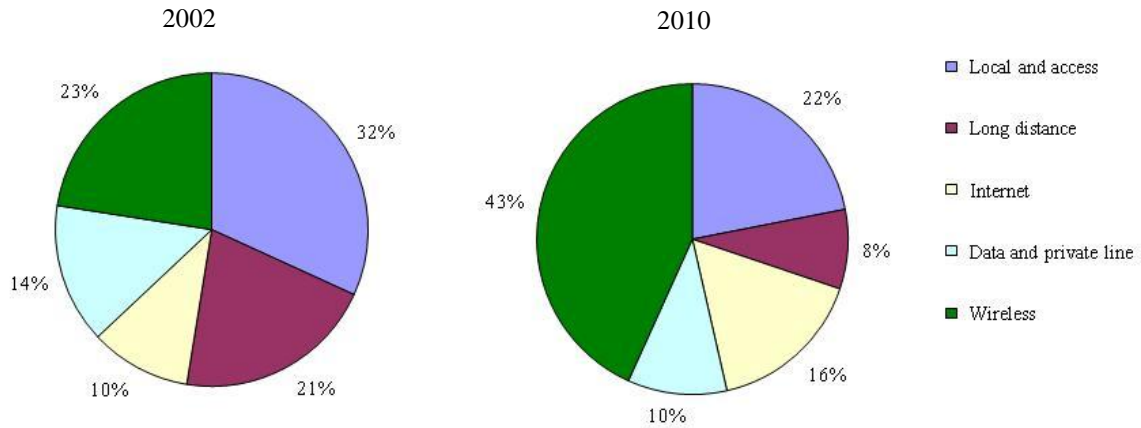
Source: CRTC data collection

Figure 5.1.2 Annual revenue growth, by market sector



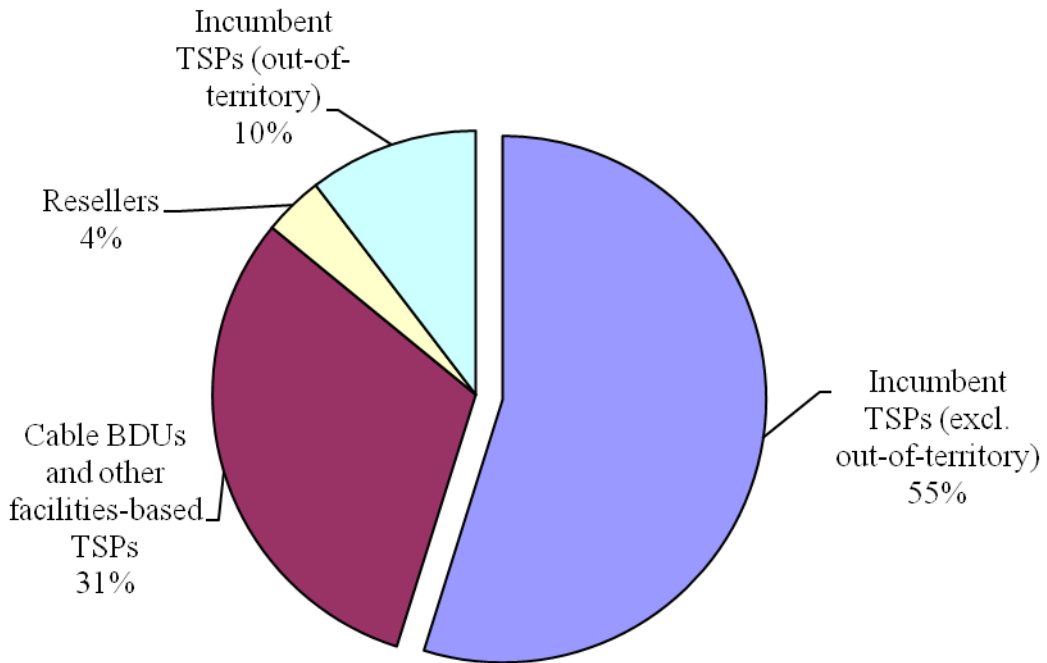
Source: CRTC data collection

Figure 5.1.3 Distribution of telecommunications revenues, by market sector



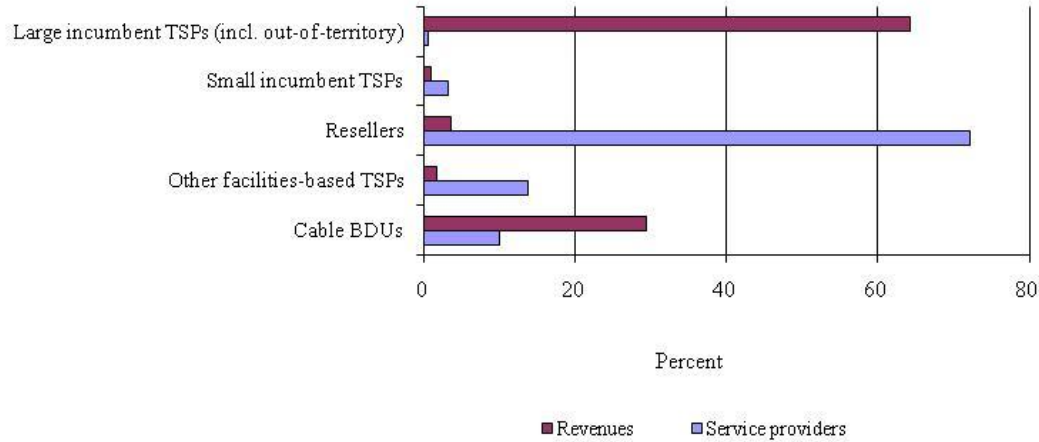
Source: CRTC data collection

Figure 5.1.4 Total telecommunications revenue market share, by type of TSP (2010)



Source: CRTC data collection

Figure 5.1.5 Total telecommunications revenue market share, by type of TSP (2010)



Source: CRTC data collection

Table 5.1.3 Percentage of telecommunications revenues generated by companies operating in one or more market sectors

Number of markets ¹	2009	2010
6	92	91
5	1	2
4	3	3
3	2	2
2	1	1
1	1	1

1. The market include local and access, long distance, Internet, data, private line, and wireless.

• Affiliates are included with thier parent company

Source: CRTC data collection

Table 5.1.4 Percentage of telecommunications revenues generated by companies operating in multiple markets (2010)

Number of markets	Number of reporting companies operating in these markets	Percentage of telecom revenues generated in these markets
6	12	91
5	11	2
4	24	3
3	31	2
2	34	1
1	63	1

• Number of markets include local and access, long distance, Internet, data & private line, and wireless.

• 2010 data restated to reflect industry players as of 30 March 2011.

• Affiliates are included with thier parent company

Source: CRTC data collection

Table 5.1.5 Total telecommunications revenues, by type of service provider (\$ millions)

	2007	2008	2009	2010
Incumbent TSPs				
Large incumbent TSPs	26,245.0	26,715.5	26,777.9	26,752.3
Small incumbent TSPs	465.2	436.0	401.8	417.5
Subtotal	26,710.2	27,151.5	27,179.7	27,169.8
Less: Incumbent TSPs (out-of-territory)	3,897.1	3,882.2	4,290.6	4,326.1
Incumbent TSPs (excl. out-of-territory)	22,813.2	23,269.3	22,889.1	22,843.7
Percent of total	60%	58%	56%	55%
Alternative TSPs				
Facilities-based alternative TSPs				
Incumbent TSPs (out-of-territory)	3,897.1	3,882.2	4,290.6	4,326.1
Cable BDUs	9,174.8 #	10,598.5 #	11,428.4 #	12,237.0
Utility telcos and other carriers	488.1	585.8	723.7	713.5
Subtotal alternative TSPs	13,560.0 #	15,066.5 #	16,442.6 #	17,276.5
Resellers	1,774.5	1,862.2	1,594.7	1,533.8
Total facilities-based alternative TSPs and resellers	15,334.5 #	16,928.6 #	18,037.2 #	18,810.3
Percent of total	40% #	42% #	44% #	45%
Total	38,147.7 #	40,198.0 #	40,926.4 #	41,654.0

Source: CRTC data collection

Table 5.1.6 Wireline telecommunications revenue market share (%), by type of TSP (2010)

	Retail			Wholesale	Total
	Residential	Business	Total		
Incumbent TSPs (excl. out-of-territory)	56.6	69.6	62.4	64.8	62.7
Alternative TSPs					
Incumbent TSPs (out-of-territory)	0.1	11.4	5.1	16.1	6.5
Facilities-based non-incumbent TSPs	37.8	10.5	25.7	16.6	24.5
Resellers	5.5	8.6	6.8	2.6	6.3
Alternative TSPs subtotal	43.4	30.4	37.6	35.2	37.3

Source: CRTC data collection

Table 5.1.7 Percentage of revenues from forborne services

	2007	2008	2009	2010
Local and access	73	75	71	73
Long distance	95	94	96	96
Internet	98	98	99	98
Data and private line	75	80	82	81
Wireless	100	100	100	100
Overall	90	90	91	92

Source: CRTC data collection

Table 5.1.8 Canadian penetration rates – Wireline and wireless subscribers (per 100 households)

Year	Wireline	Wireless	Wireline and/or wireless	Wireless (only)
2002	97.0	51.6	98.7	1.7
2003	96.3	53.9	98.8	2.5
2004	96.2	58.9	98.9	2.7
2005	94.0	n/a	98.8	4.8
2006	93.6	66.8	98.6	5.0
2007	92.5	71.9	98.8	6.3
2008	91.1	74.3	99.1	8.0
2009	89.3	77.2	99.3	10.0
2010	n/a	n/a	n/a	n/a

• n/a: not available

Source: Statistics Canada Affordability Study (2002 - 2007), Survey of Household Spending (2008 - 2009)

Table 5.1.9 Canadian penetration rates by income quintile (2009) – Wireline and wireless subscribers (per 100 households)

Income quintile	Wireline	Wireless	Wireline and/or wireless	Wireline only	Wireless only
First	82.0	50.5	97.7	47.2	15.7
Second	87.1	70.8	99.5	28.7	12.4
Third	89.3	81.6	99.9	18.3	10.6
Fourth	92.4	90.4	100.0	9.6	7.6
Fifth	96.0	92.6	99.6	7.0	3.6
All households	89.3	77.2	99.3%	22.1	10.0

• The upper bounds in 2009 for the first to the fourth quintiles are: \$28K, \$48K, \$71K and \$108K.

• 2010 results not available

Source: Statistics Canada - Survey of household spending

Table 5.1.10 Monthly household telecommunications expenditures (2009) – Wireline and wireless

Income quintile	Wireline local service	Wireless service	Internet access
First	37.50	35.00	30.00
Second	41.33	40.00	35.00
Third	42.67	50.00	39.42
Fourth	45.00	60.42	39.50
Fifth	50.00	70.83	43.00
All households	42.50	50.00	39.00

• The upper bounds in 2009 for the first to the fourth quintiles are: \$28K, \$48K, \$71K and \$108K.

Source: Statistics Canada - Survey of household spending

Table 5.1.11 Number of connections (millions)

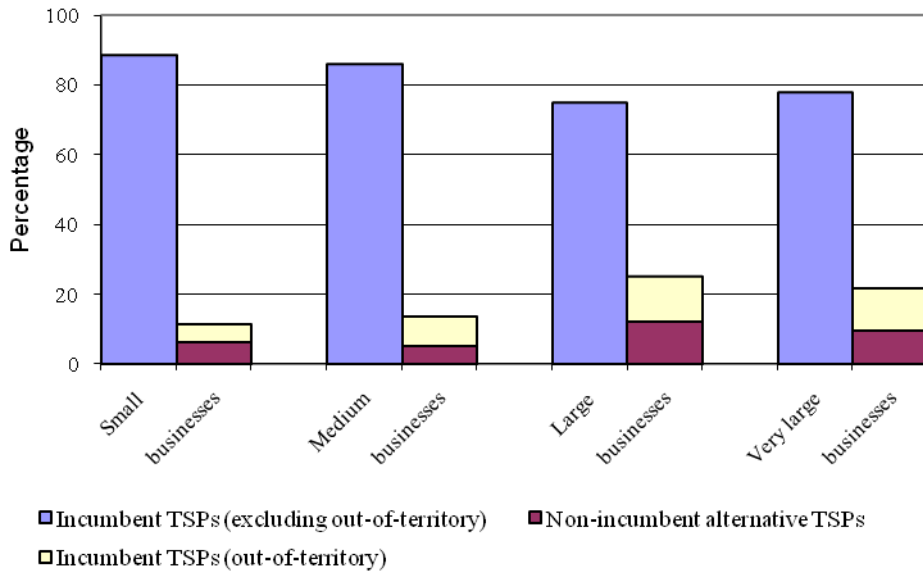
	2008	2009	2010	CAGR 2008-2010
Local and access ¹	19.3	18.7	18.4	-2.4%
<i>Annual growth</i>	0.0%	-2.9%	-1.7%	
Internet ²	9.8	10.1	10.4	2.8%
<i>Annual growth</i>	5.6%	3.1%	2.7%	
Wireless ¹	22.1	23.8	25.8	8.1%
<i>Annual growth</i>	9.0%	7.8%	8.5%	
Total	51.2	52.6	54.6	3.3%
<i>Annual growth</i>	4.7%	2.7%	3.8%	

1. Includes residential and business connections

2. Excludes business connections

Source: CRTC data collection

Figure 5.1.6 Total business market wireline revenue distribution, by customer size and type of TSP (2010)



• Revenues include wireline revenues from local and access, long distance, and data and private line services.
Source: CRTC data collection

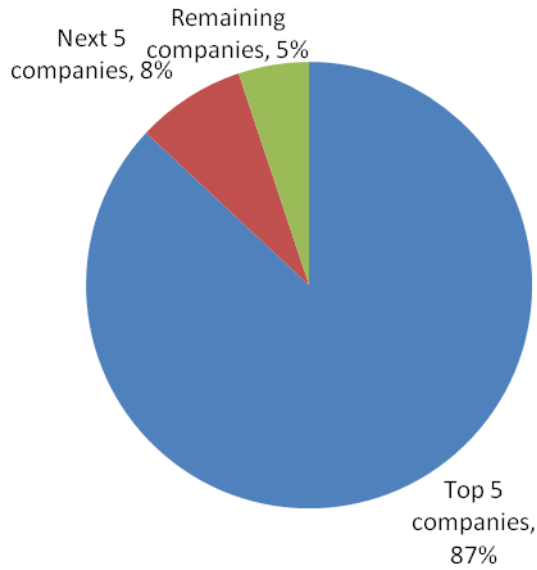
Table 5.1.12 Percentage of subscribers with local service bundled with other services

Number of services in a bundle ¹	2006	2007	2008	2009	2010
Two or more services	15	25	25	34	48

1. Local service bundled with Internet, wireless, and video distribution.

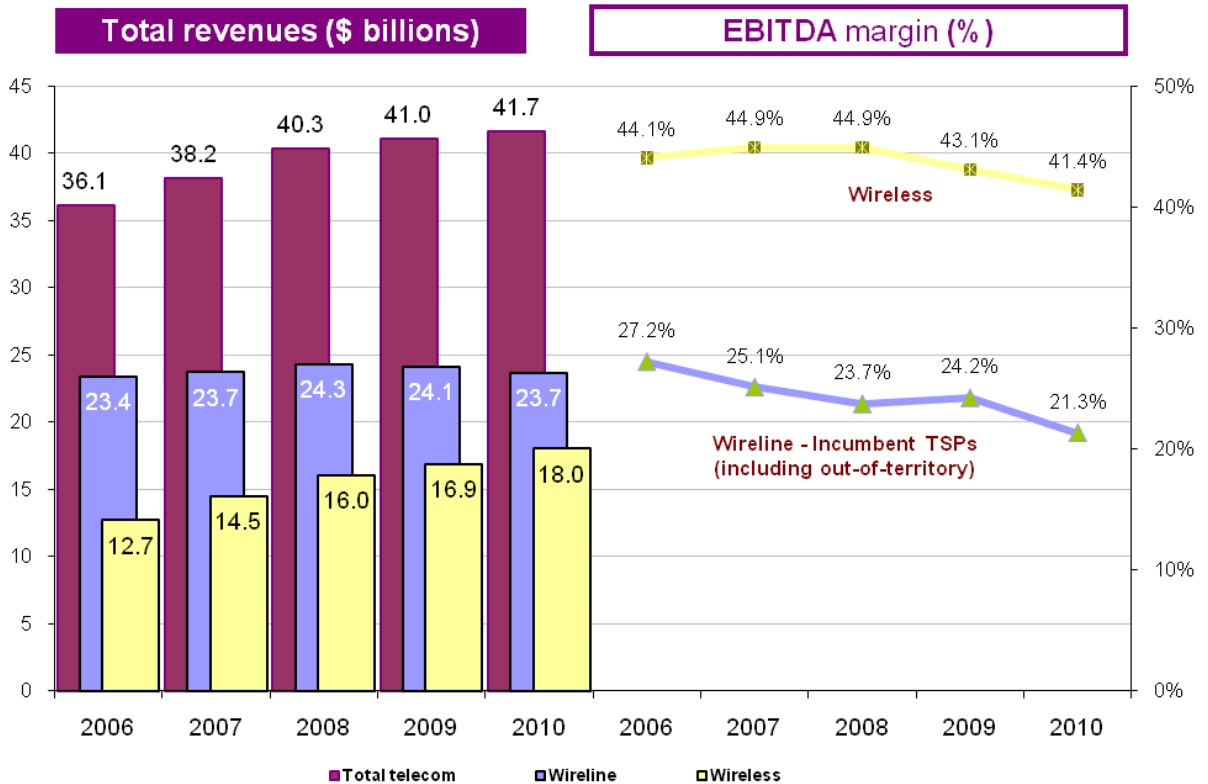
Source: CRTC data collection

Figure 5.1.7 Telecommunications revenues for the top 5 group of companies, the next top 5 group of companies and the remaining companies (2010)



• Revenues for the top companies include those of the companies' affiliates.
 Source: CRTC data collection

Figure 5.1.8 Telecommunications revenues and EBITDA margins



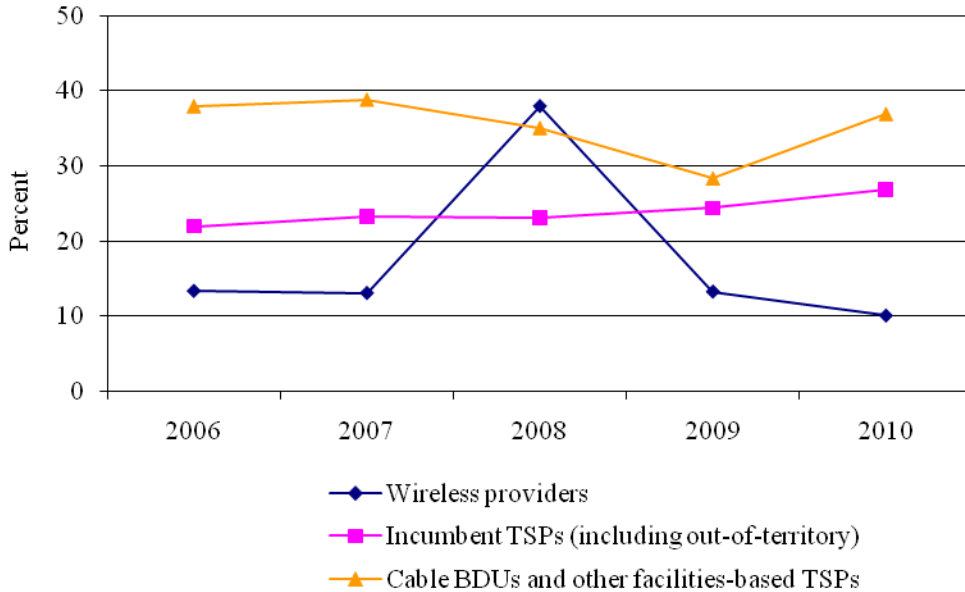
Source: CRTC data collection

Table 5.1.13 Capex, by type of TSP (\$ billions)

	2006	2007	2008	2009	2010	CAGR 2006- 2010
Wireline						
Incumbent TSPs (including out-of-territory)	4.0	4.2	4.1	4.2	4.4	2.6%
<i>Annual growth</i>	11.4%	5.3%	-1.4%	1.4%	5.1%	
Alternative TSPs						
Non-incumbent, facilities-based alternative TSPs	1.2	1.6	1.7	1.5	2.1	14.7%
<i>Annual growth</i>	109.0%	31.0%	5.6%	-10.7%	40.2%	
Resellers	0.1	0.1	0.1	0.0	0.0	-22.2%
<i>Annual growth</i>	-16.8%	41.8%	-2.5%	-59.0%	-35.5%	
Alternative TSPs total	1.3	1.7	1.8	1.6	2.2	13.7%
<i>Annual growth</i>	96.1%	31.5%	5.2%	-12.8%	38.7%	
Wireline total	5.3	5.9	5.9	5.7	6.6	5.6%
<i>Annual growth</i>	24.6%	11.8%	0.5%	-2.9%	14.2%	
Wireless	1.7	1.9	6.1	2.2	1.8	2.0%
<i>Annual growth</i>	22.5%	12.7%	220.2%	-63.0%	-18.9%	
Wireline and wireless total	6.9	7.8	12.0	8.0	8.4	4.8%
<i>Annual growth</i>	24.1%	12.0%	54.1%	-33.4%	4.9%	

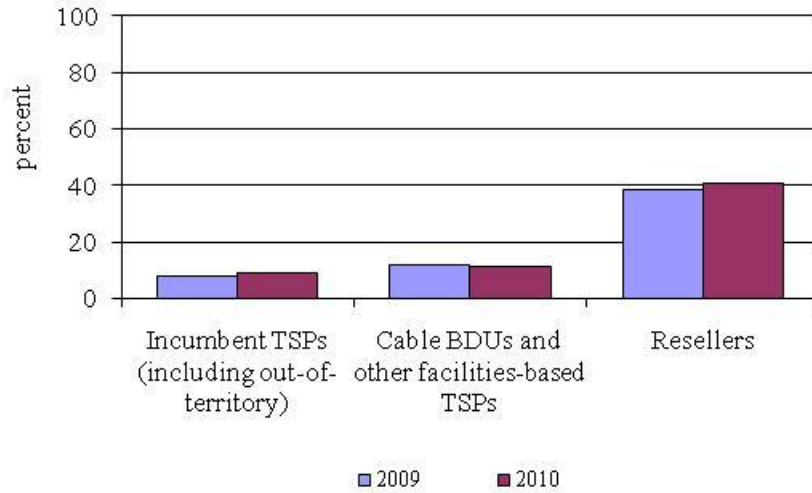
• n/a: not available
Source: CRTC data collection

Figure 5.1.9 Capex as a percentage of revenues, by type of TSP (includes AWS expenditures in 2010)



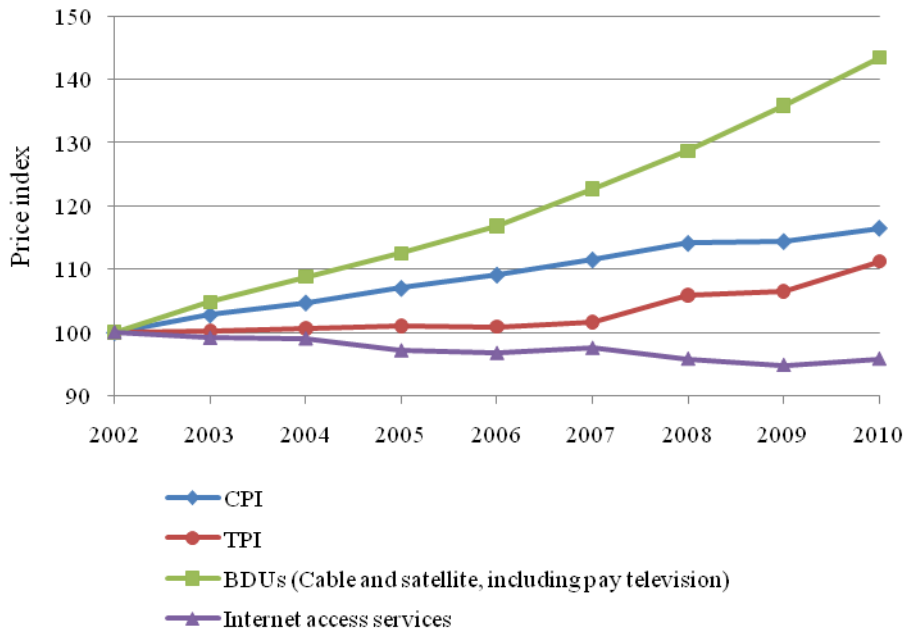
Source: CRTC data collection

Figure 5.1.10 Wireline inter-carrier expenses as a percentage of revenues, by type of TSP



Source: CRTC data collection

Figure 5.1.11 Price indices [TPI¹, BDU² (cable and satellite, including pay television), Internet access services, and CPI]



1. The TPI reflects the price changes experienced by a household for a basket of telephone services. The basket of telephone services reflects a weighted average of consumer expenditures on basic local service, other local services (such as options and features), and long distance, installation, and repair services. However, the TPI does not include wireless nor Internet service expenditures.
2. The BDU price index reflects the price changes experienced by a household for a basket of cable television services. The basket includes both 'Basic' and 'Extended' cable services. Basic cable service is the minimum service to which all customers must subscribe. Extended cable service is the most popular package of additional channels. The index does not account for 'bundling discounts.'

Source: Statistics Canada, CANSIM Table 326-0

5.2 Wireline voice market sector

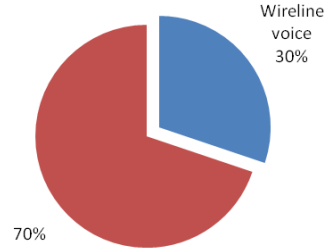
Overview

In 2010, 91% of Canadian households subscribed to wireline voice communication services.

There were over 100 providers of local and access services and over 150 providers of long distance services in 2010. These service providers include the following:

- large incumbent TSPs, which provide both local and long distance services, primarily over their own networks;
- small incumbent TSPs, which operate in limited areas of Ontario, Quebec, and British Columbia, and include municipally owned, public, and private carriers;
- cable BDUs, which provide network-based local and long distance services; and
- resellers, which do not own their own facilities and tend to concentrate on the long distance market by offering dial-around or prepaid card services.

Telecommunications revenues
\$41.7 billion
2010



Wireline voice sector at a glance

	2009	2010	% Change
Revenues (\$ billions)	13.0	12.4	-4.9
Local and access ¹	9.2	9.0	-2.4
Long distance ²	3.9	3.4	-11.0
Local lines (millions)	20.3	20.0	-1.7
Monthly retail local and long distance revenues per line	\$50.71	\$48.71	-3.9
Monthly retail local revenues per line	\$37.01	\$36.78	-0.6
Residence	\$31.49	\$31.35	-0.4
Business	\$48.64	\$48.51	-0.3
Retail long distance revenues per minute	\$0.066	\$0.061	-8.0
Residence	\$0.077	\$0.072	-5.8
Business	\$0.052	\$0.046	-11.0
Incumbent revenue market share (excluding out-of-territory)			
Local and access	79%	78%	
Long distance	60%	59%	

- Revenues from telephony services that do not involve connectivity to the PSTN (i.e. computer-to-computer communication) and revenues from wireline terminal equipment sales (telephones and PBX equipment) are excluded from local and access revenues.
- Long distance calls originating from mobile phones are included in the wireless section of this report. However, revenues and minutes from wireline and wireless long distance calls associated with calling cards are included in the wireline voice sector.

Source: CRTC data collection

Statistical information – Wireline voice market sector
Table 5.2.1 Local and access, and long distance revenues, local lines, and long distance minutes

	2006	2007	2008	2009	2010	CAGR 2006 – 2010
Total local and access revenues (\$ millions)	9,618	9,544	9,550	9,386 #	9,132	-1.3%
<i>Annual Growth</i>	-1.5%	-0.8%	0.1%	-1.7%	-2.7%	
Less: contribution revenues (\$ millions)	238	219	209	203 #	165	-8.8%
Local and access service revenues (\$ millions)	9,380	9,324	9,342	9,183	8,967	-1.1%
<i>Annual Growth</i>	-1.4%	-0.6%	0.2%	-1.7%	-2.4%	
Long distance revenues (\$ millions)	4,742	4,318	4,153	3,856	3,432	-7.8%
<i>Annual Growth</i>	-7.2%	-8.9%	-3.8%	-7.1%	-11.0%	
Local and access and long distance revenues (\$ millions)	14,122	13,642	13,494	13,039	12,399	-3.2%
<i>Annual Growth</i>	-3.4%	-3.4%	-1.1%	-3.4%	-4.9%	
Local lines including access-independent VoIP lines (thousands)	21,000	20,926	20,947	20,348	19,996	-1.2%
<i>Annual Growth</i>	1.1%	-0.4%	0.1%	-2.9%	-1.7%	
Access-independent VoIP lines (thousands)	161	167	153	161	n.a.	-
<i>Annual Growth</i>	n.a.	3.7%	-8.5%	5.0%		
Long distance minutes (millions)	71,998	72,345	70,231	70,035	70,922	-0.4%
<i>Annual Growth</i>	7.9%	0.5%	-2.9%	-0.3%	1.3%	

Source: CRTC data collection

Table 5.2.2 Local and access, and long distance forborne revenues and lines (Percent)

	2008	2009	2010
Forborne revenues			
Local and access	75	71	73
Long distance	94	96	96
Forborne local lines			
Residential	77	77	80
Business	68	68	72

Source: CRTC data collection

Table 5.2.3 Local and access and long distance revenues, by service category (\$ millions)

	2007	2008	2009	2010	CAGR 2007 – 2010
Local and access					
Residential	4,847	4,869	4,794	4,732	-0.8%
<i>Annual Growth</i>	-2.0%	0.5%	-1.5%	-1.3%	
Business	3,581	3,552	3,514	3,386	-1.9%
<i>Annual Growth</i>	1.9%	-0.8%	-1.1%	-3.7%	
Subtotal retail	8,428	8,421	8,308	8,117	-1.2%
<i>Annual Growth</i>	-0.4%	-0.1%	-1.3%	-2.3%	
Wholesale	814	851	824	798	-0.7%
<i>Annual Growth</i>	-1.6%	4.6%	-3.2%	-3.1%	
Total local and access	9,242	9,272	9,132	8,915	-1.2%
<i>Annual Growth</i>	-0.5%	0.3%	-1.5%	-2.4%	
Long distance					
Residential	2,251	2,170	1,999	1,728	-8.4%
<i>Annual Growth</i>	-6.6%	-3.6%	-7.9%	-13.6%	
Business	1,299	1,156	1,077	907	-11.3%
<i>Annual Growth</i>	-11.3%	-11.0%	-6.9%	-15.8%	
Subtotal retail	3,550	3,326	3,076	2,634	-9.5%
<i>Annual Growth</i>	-8.4%	-6.3%	-7.5%	-14.4%	
Wholesale	768	827	780	797	1.3%
<i>Annual Growth</i>	-11.4%	7.7%	-5.7%	2.2%	
Total long distance	4,318	4,153	3,856	3,432	-7.4%
<i>Annual Growth</i>	-8.9%	-3.8%	-7.1%	-11.0%	
Local and access, and long distance					
Residential	7,098	7,039	6,793	6,459	-3.1%
<i>Annual Growth</i>	-3.5%	-0.8%	-3.5%	-4.9%	
Business	4,880	4,708	4,591	4,292	-4.2%
<i>Annual Growth</i>	-2.0%	-3.5%	-2.5%	-6.5%	
Subtotal retail	11,978	11,747	11,384	10,751	-3.5%
<i>Annual Growth</i>	-2.9%	-1.9%	-3.1%	-5.6%	
Wholesale	1,582	1,678	1,604	1,595	0.3%
<i>Annual Growth</i>	-6.6%	6.1%	-4.4%	-0.5%	
Total local and access, and long distance	13,560	13,425	12,988	12,347	-3.1%
<i>Annual Growth</i>	-3.4%	-1.0%	-3.3%	-4.9%	

Source: CRTC data collection

Table 5.2.4 Local and access revenues, by type of TSP (\$ millions)

	2007	2008	2009	2010	CAGR 2007 – 2010
Residential					
Incumbent TSPs (excluding out-of-territory)	4,096	3,827	3,546	3,349	-6.5%
<i>Annual Growth</i>	-8.1%	-6.6%	-7.3%	-5.6%	
Incumbent TSPs (out-of-territory)	6	10	9	9	16.1%
<i>Annual Growth</i>	12.7%	69.4%	-5.9%	-1.8%	
Non-incumbent, alternative TSPs (excluding cable BDUs)	86	126	140	123	12.8%
<i>Annual Growth</i>	20.0%	47.7%	10.7%	-12.2%	
Cable BDUs	659	906	1,099	1,252	23.8%
<i>Annual Growth</i>	59.4%	37.4%	21.3%	13.9%	
Total residential	4,847	4,869	4,794	4,732	-0.8%
<i>Annual Growth</i>	-2.0%	0.5%	-1.5%	-1.3%	
Business					
Incumbent TSPs (excluding out-of-territory)	3,114	3,096	3,017	2,934	-2.0%
<i>Annual Growth</i>	3.0%	-0.6%	-2.6%	-2.7%	
Incumbent TSPs (out-of-territory)	323	309	309	270	-5.8%
<i>Annual Growth</i>	3.2%	-4.3%	-0.1%	-12.6%	
Non-incumbent, alternative TSPs	144	147	189	182	8.1%
<i>Annual Growth</i>	-19.0%	2.0%	28.7%	-3.9%	
Total business	3,581	3,552	3,514	3,386	-1.9%
<i>Annual Growth</i>	1.9%	-0.8%	-1.1%	-3.7%	
Retail					
Incumbent TSPs (excluding out-of-territory)	7,210	6,923	6,563	6,282	-4.5%
<i>Annual Growth</i>	-3.6%	-4.0%	-5.2%	-4.3%	
Incumbent TSPs (out-of-territory)	329	319	318	279	-5.4%
<i>Annual Growth</i>	3.4%	-3.1%	-0.3%	-12.3%	
Non-incumbent, alternative TSPs	889	1,180	1,428	1,556	20.5%
<i>Annual Growth</i>	34.1%	32.7%	21.0%	9.0%	
Total retail	8,428	8,421	8,308	8,117	-1.2%
<i>Annual Growth</i>	-0.4%	-0.1%	-1.3%	-2.3%	
Wholesale					
Incumbent TSPs (excluding out-of-territory)	664	686	660	653	-0.6%
<i>Annual Growth</i>	-0.4%	3.2%	-3.8%	-1.1%	
Incumbent TSPs (out-of-territory)	109	114	115	105	-1.5%
<i>Annual Growth</i>	-18.3%	4.3%	0.4%	-8.6%	
Non-incumbent, alternative TSPs	40	51	49	41	0.3%
<i>Annual Growth</i>	54.4%	27.2%	-3.7%	-17.6%	
Total wholesale	814	851	824	798	-0.7%
<i>Annual Growth</i>	-1.6%	4.6%	-3.2%	-3.1%	
Total					
Incumbent TSPs (excluding out-of-territory)	7,874	7,609	7,223	6,935	-4.1%
<i>Annual Growth</i>	-3.3%	-3.4%	-5.1%	-4.0%	
Incumbent TSPs (out-of-territory)	438	433	432	383	-4.4%
<i>Annual Growth</i>	-3.0%	-1.2%	-0.1%	-11.3%	
Non-incumbent, alternative TSPs	929	1,231	1,477	1,597	19.8%
<i>Annual Growth</i>	34.9%	32.4%	20.0%	8.1%	
Total revenues	9,242	9,272	9,132	8,915	-1.2%
<i>Annual Growth</i>	-0.5%	0.3%	-1.5%	-2.4%	

Source: CRTC data collection

Table 5.2.5 Local and access lines, by type of TSP (thousands)

	2007	2008	2009	2010	CAGR 2007 – 2010
Residential					
Incumbent TSPs (excluding out-of-territory)	10,356	9,541	8,818	8,142	-7.7%
<i>Annual Growth</i>	-6.7%	-7.9%	-7.6%	-7.7%	
Incumbent TSPs (out-of-territory)	26	27	28	27	0.3%
<i>Annual Growth</i>	25.4%	2.9%	4.6%	-6.1%	
Non-incumbent, alternative TSPs (excluding cable BDUs)	231	505	416	463	26.1%
<i>Annual Growth</i>	-1.6%	118.7%	-17.6%	11.3%	
Cable BDUs	2,313	2,917	3,425	3,947	19.5%
<i>Annual Growth</i>	45.5%	26.1%	17.4%	15.2%	
Total residential	12,927	12,990	12,687	12,578	-0.9%
<i>Annual Growth</i>	-0.2%	0.5%	-2.3%	-0.9%	
Business					
Incumbent TSPs (excluding out-of-territory)	5,252	5,270	4,968	4,721	-3.5%
<i>Annual Growth</i>	-0.2%	0.4%	-5.7%	-5.0%	
Incumbent TSPs (out-of-territory)	640	614	617	638	-0.1%
<i>Annual Growth</i>	4.2%	-4.0%	0.5%	3.3%	
Non-incumbent, alternative TSPs	438	390	435	457	1.4%
<i>Annual Growth</i>	12.4%	-11.1%	11.7%	5.0%	
Total business	6,330	6,274	6,021	5,815	-2.8%
<i>Annual Growth</i>	1.0%	-0.9%	-4.0%	-3.4%	
Retail					
Incumbent TSPs (excluding out-of-territory)	15,608	14,811	13,786	12,863	-6.2%
<i>Annual Growth</i>	-4.6%	-5.1%	-6.9%	-6.7%	
Incumbent TSPs (out-of-territory)	666	641	646	664	-0.1%
<i>Annual Growth</i>	4.9%	-3.8%	0.7%	2.9%	
Non-incumbent, alternative TSPs	2,983	3,812	4,276	4,867	17.7%
<i>Annual Growth</i>	34.7%	27.8%	12.2%	13.8%	
Total retail	19,257	19,264	18,708	18,394	-1.5%
<i>Annual Growth</i>	0.2%	0.0%	-2.9%	-1.7%	
Wholesale					
Incumbent TSPs (excluding out-of-territory)	551	623	533	515	-2.2%
<i>Annual Growth</i>	22.1%	13.2%	-14.4%	-3.4%	
Incumbent TSPs (out-of-territory)	405	262	300	266	-13.0%
<i>Annual Growth</i>	-13.9%	-35.4%	14.6%	-11.2%	
Non-incumbent, alternative TSPs	84	97	99	88	1.4%
<i>Annual Growth</i>	75.6%	15.4%	1.7%	-11.1%	
Total wholesale	1,040	982	932	870	-5.8%
<i>Annual Growth</i>	7.3%	-5.5%	-5.1%	-6.7%	
Total					
Incumbent TSPs (excluding out-of-territory)	16,159	15,434	14,319	13,378	-6.1%
<i>Annual Growth</i>	-3.9%	-4.5%	-7.2%	-6.6%	
Incumbent TSPs (out-of-territory)	1,071	903	946	931	-4.6%
<i>Annual Growth</i>	-3.1%	-15.7%	4.7%	-1.6%	
Non-incumbent, alternative TSPs	3,067	3,909	4,375	4,955	17.3%
<i>Annual Growth</i>	35.5%	27.5%	11.9%	13.2%	
Total lines	20,297	20,246	19,640	19,263	-1.7%
<i>Annual Growth</i>	0.5%	-0.2%	-3.0%	-1.9%	

Source: CRTC data collection

Table 5.2.6 Local and long distance retail monthly revenues per line

	2007	2008	2009	2010	CAGR 2007 – 2010
Local and long distance					
Residential	45.76	45.15	44.62	42.79	-2.2%
<i>Annual Growth</i>	-3.4%	-1.3%	-1.2%	-4.1%	
Business	64.24	62.53	63.55	61.50	-1.4%
<i>Annual Growth</i>	-2.9%	-2.7%	1.6%	-3.2%	
Total retail	51.83	50.81	50.71	48.71	-2.1%
<i>Annual Growth</i>	-3.1%	-2.0%	-0.2%	-3.9%	

Source: CRTC data collection

Table 5.2.7 Local and access retail monthly revenues (\$), per line by type of TSP

	2007	2008	2009	2010	CAGR 2007 – 2010
Residential					
Incumbent TSPs (excluding out-of-territory)	32.96	33.43	33.51	34.27	1.3%
<i>Annual Growth</i>	-1.5%	1.4%	0.3%	2.3%	
Incumbent TSPs (out-of-territory)	17.83	29.36	26.42	27.62	15.7%
<i>Annual Growth</i>	-10.1%	64.7%	-10.0%	4.6%	
Non-incumbent, alternative TSPs (excluding cable BDUs)	30.91	20.87	28.04	22.10	-10.6%
<i>Annual Growth</i>	21.9%	-32.5%	34.4%	-21.2%	
Cable BDUs	23.75	25.88	26.73	26.42	3.6%
<i>Annual Growth</i>	9.6%	9.0%	3.3%	-1.1%	
Total residential	31.25	31.24	31.49	31.35	0.1%
<i>Annual Growth</i>	-1.9%	0.0%	0.8%	-0.4%	
Business					
Incumbent TSPs (excluding out-of-territory)	49.41	48.95	50.60	51.79	1.6%
<i>Annual Growth</i>	3.2%	-0.9%	3.4%	2.4%	
Incumbent TSPs (out-of-territory)	42.08	41.94	41.67	35.26	-5.7%
<i>Annual Growth</i>	-0.9%	-0.3%	-0.6%	-15.4%	
Non-incumbent, alternative TSPs	27.39	31.43	36.22	33.17	6.6%
<i>Annual Growth</i>	-28.0%	14.7%	15.2%	-8.4%	
Total business	47.14	47.18	48.64	48.51	1.0%
<i>Annual Growth</i>	0.9%	0.1%	3.1%	-0.3%	
Retail					
Incumbent TSPs (excluding out-of-territory)	38.49	38.95	39.67	40.70	1.9%
<i>Annual Growth</i>	1.1%	1.2%	1.8%	2.6%	
Incumbent TSPs (out-of-territory)	41.12	41.41	41.00	34.95	-5.3%
<i>Annual Growth</i>	-1.5%	0.7%	-1.0%	-14.8%	
Non-incumbent, alternative TSPs	24.84	25.79	27.82	26.65	2.4%
<i>Annual Growth</i>	-0.4%	3.8%	7.9%	-4.2%	
Total retail	36.47	36.43	37.01	36.78	0.3%
<i>Annual Growth</i>	-0.6%	-0.1%	1.6%	-0.6%	

Source: CRTC data collection

Table 5.2.8 Incumbent TSP provincial retail local market share, by line

Province	2008	2009	2010
British Columbia	80.1%	75.6%	67.3%
Alberta	76.4%	71.7%	68.2%
Saskatchewan	95.9%	94.3%	93.0%
Manitoba	89.7%	87.1%	83.7%
Ontario	77.4%	73.4%	70.2%
Quebec	72.5%	67.0%	62.8%
New Brunswick	92.9%	87.5%	85.1%
Nova Scotia	73.8%	70.4%	67.8%
Prince Edward Island	82.5%	79.2%	74.7%
Newfoundland and Labrador	91.8%	90.6%	89.4%
All provinces	78.1%	73.8%	69.8%

Source: CRTC data collection

Table 5.2.9 Incumbent TSP residential and business local market share, by line for major centres¹

Province	Major centre	Residential lines		Business lines	
		2009	2010	2009	2010
British Columbia	Vancouver	67.0%	57.6%	73.6%	70.8%
	Victoria	56.3%	47.1%	81.4%	84.2%
Alberta	Calgary	58.3%	49.6%	70.1%	68.8%
	Edmonton	65.0%	58.1%	72.8%	71.8%
Saskatchewan	Saskatoon	83.0%	77.1%	97.9%	99.1%
	Regina	88.5%	86.8%	99.0%	98.6%
Manitoba	Winnipeg	70.3%	62.8%	97.1%	98.1%
Ontario	Toronto	62.5%	60.3%	76.0%	73.3%
	Ottawa – Gatineau	64.2%	60.4%	89.1%	88.6%
	Hamilton	62.9%	59.2%	80.8%	76.8%
	London	64.5%	62.3%	76.9%	76.5%
	Kitchener – Waterloo	63.3%	60.5%	77.0%	76.8%
	St. Catharines – Niagara	72.8%	68.2%	83.2%	80.5%
	Windsor	74.5%	70.3%	73.4%	69.7%
	Oshawa	60.5%	57.0%	86.1%	84.1%
Quebec	Montréal	55.5%	51.7%	74.6%	74.4%
	Québec	51.3%	46.0%	71.5%	76.8%
New Brunswick	Fredericton	76.4%	75.3%	99.3%	99.4%
Nova Scotia	Halifax	51.3%	46.7%	77.0%	75.8%
Prince Edward Island	Charlottetown	60.7%	56.0%	84.2%	84.1%
Newfoundland and Labrador	St. John's	81.6%	77.0%	85.4%	88.2%

¹ Major centre boundaries are defined using Statistics Canada's census metropolitan area and census agglomeration definitions.

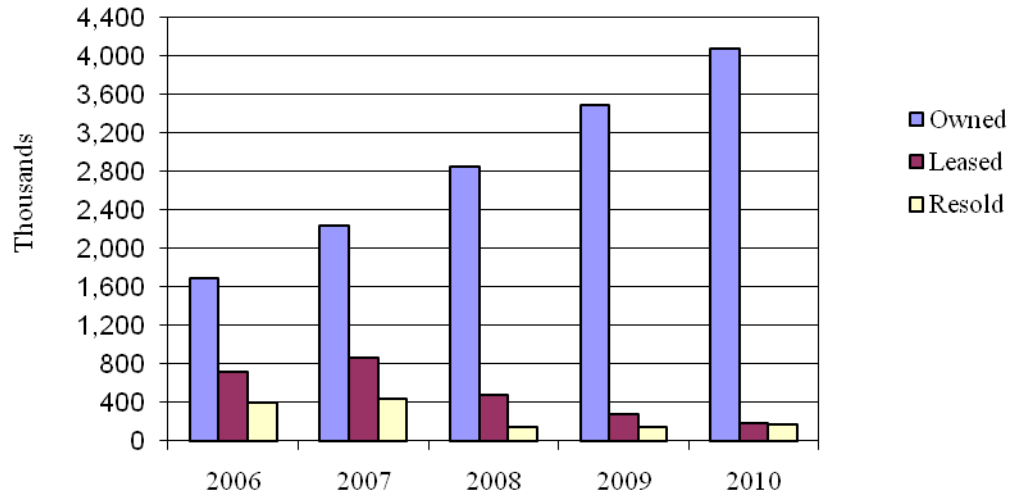
Source: CRTC data collection

Table 5.2.10 Local wholesale revenues, by major component (\$ millions)

	2006	2007	2008	2009	2010	CAGR 2006 – 2010
Interconnection	293	273	281	280	276	-1.5%
Centrex	106	104	97	97	89	-4.4%
PSTN access	256	261	280	290	288	3.0%
Unbundled loops	119	120	116	92	79	-9.8%
Other revenues	53	45	47	33	42	-5.5%
Total	827	802	821	792	774	-1.7%

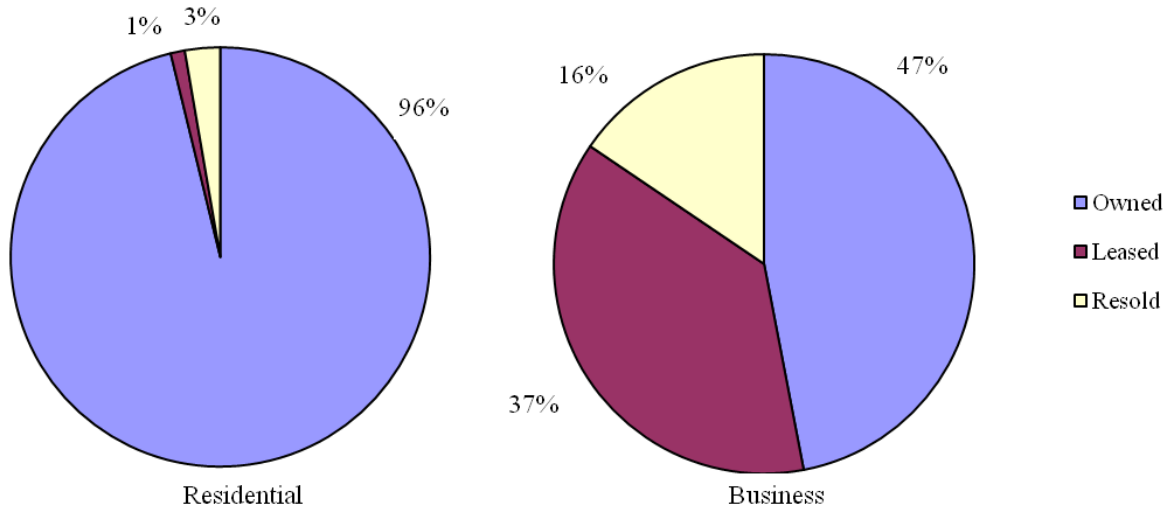
Source: CRTC data collection

Figure 5.2.1 Alternative TSP local retail lines (excluding incumbent out-of-territory), by type of facility



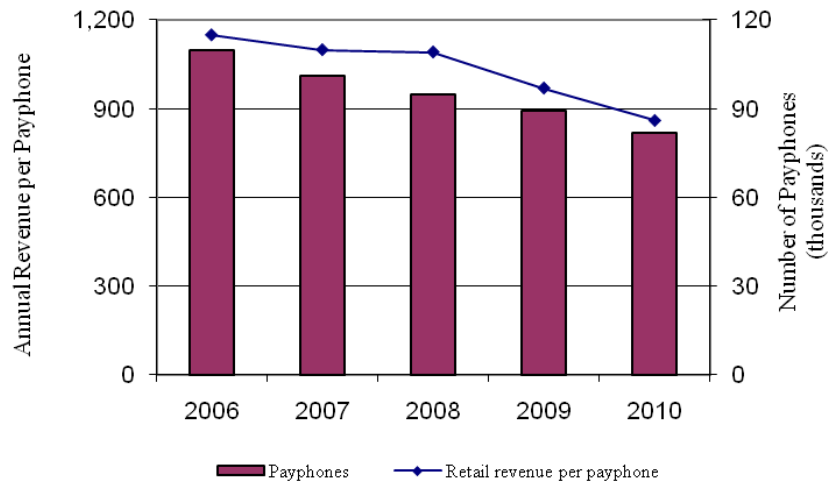
Source: CRTC data collection

Figure 5.2.2 Alternative TSP local residential and business lines, by type of facility (2010)



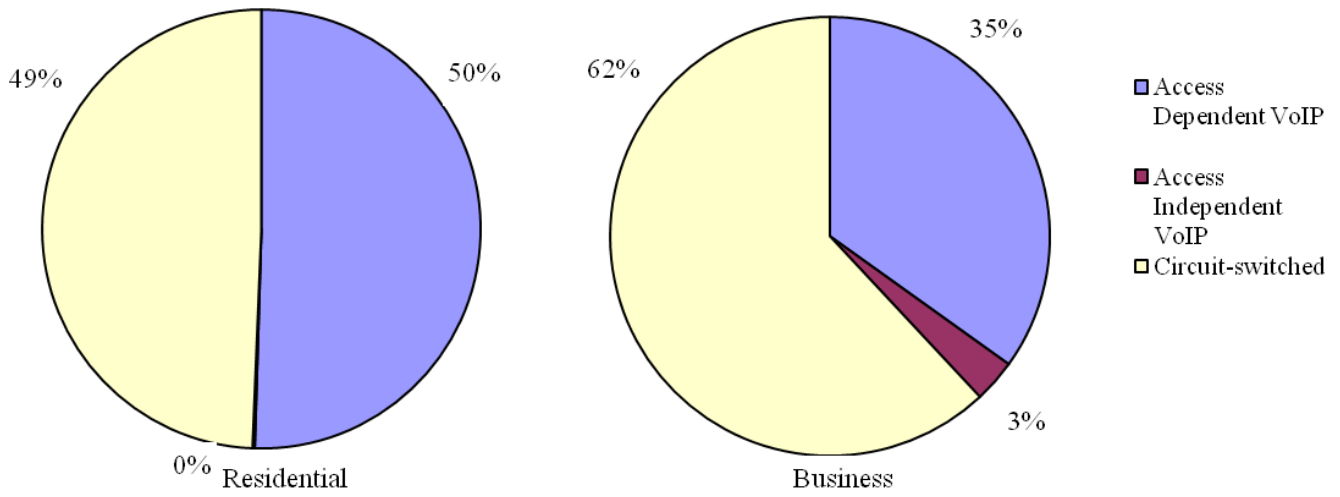
Source: CRTC data collection

Figure 5.2.3 Large incumbent TSP pay telephone quantities and retail revenue per payphone



Source: CRTC data collection

Figure 5.2.4 Share of circuit-switched v. VoIP retail local lines



Source: CRTC data collection

Table 5.2.11 Long distance revenues, by type of TSP (\$ millions)

	2007	2008	2009	2010	CAGR 2007 – 2010
Residential					
Incumbent TSPs (excluding out-of-territory)	1,505	1,440	1,288	1,136	-8.9%
<i>Annual Growth</i>	-9.0%	-4.4%	-10.6%	-11.8%	
Incumbent TSPs (out-of-territory)	5	3	2	2	-29.9%
<i>Annual Growth</i>	-0.2%	-47.5%	-21.5%	-16.4%	
Non-incumbent, alternative TSPs	741	727	709	590	-7.3%
<i>Annual Growth</i>	-1.3%	-1.8%	-2.5%	-16.9%	
Total residential	2,251	2,170	1,999	1,728	-8.4%
<i>Annual Growth</i>	-6.6%	-3.6%	-7.9%	-13.6%	
Business					
Incumbent TSPs (excluding out-of-territory)	750	686	669	565	-9.0%
<i>Annual Growth</i>	-7.6%	-8.6%	-2.4%	-15.6%	
Incumbent TSPs (out-of-territory)	212	176	161	115	-18.4%
<i>Annual Growth</i>	-11.6%	-17.2%	-8.4%	-28.2%	
Non-incumbent, alternative TSPs	337	295	247	226	-12.4%
<i>Annual Growth</i>	-18.3%	-12.5%	-16.2%	-8.3%	
Total business	1,299	1,156	1,077	907	-11.3%
<i>Annual Growth</i>	-11.3%	-11.0%	-6.9%	-15.8%	
Retail					
Incumbent TSPs (excluding out-of-territory)	2,255	2,126	1,957	1,701	-9.0%
<i>Annual Growth</i>	-8.6%	-5.7%	-7.9%	-13.1%	
Incumbent TSPs (out-of-territory)	217	178	163	117	-18.6%
<i>Annual Growth</i>	-11.4%	-17.9%	-8.6%	-28.1%	
Non-incumbent, alternative TSPs	1,078	1,022	956	816	-8.8%
<i>Annual Growth</i>	-7.3%	-5.2%	-6.4%	-14.6%	
Total retail	3,550	3,326	3,076	2,634	-9.5%
<i>Annual Growth</i>	-8.4%	-6.3%	-7.5%	-14.4%	
Wholesale					
Incumbent TSPs (excluding out-of-territory)	414	420	373	311	-9.1%
<i>Annual Growth</i>	3.6%	1.4%	-11.2%	-16.6%	
Incumbent TSPs (out-of-territory)	217	262	231	229	1.8%
<i>Annual Growth</i>	-19.7%	20.9%	-11.8%	-1.1%	
Non-incumbent, alternative TSPs	137	145	176	257	23.5%
<i>Annual Growth</i>	-30.6%	6.0%	21.4%	46.3%	
Total wholesale	768	827	780	797	1.3%
<i>Annual Growth</i>	-11.4%	7.7%	-5.7%	2.2%	
Total					
Incumbent TSPs (excluding out-of-territory)	2,670	2,546	2,330	2,012	-9.0%
<i>Annual Growth</i>	-6.9%	-4.6%	-8.5%	-13.6%	
Incumbent TSPs (out-of-territory)	434	440	394	346	-7.3%
<i>Annual Growth</i>	-15.7%	1.4%	-10.5%	-12.2%	
Non-incumbent, alternative TSPs	1,214	1,167	1,132	1,073	-4.0%
<i>Annual Growth</i>	-10.7%	-3.9%	-3.0%	-5.2%	
Total revenues	4,318	4,153	3,856	3,432	-7.4%
<i>Annual Growth</i>	-8.9%	-3.8%	-7.1%	-11.0%	

Source: CRTC data collection

Table 5.2.12 Long distance retail revenues (\$) per minute, by type of TSP

	2007	2008	2009	2010	CAGR 2007 – 2010
Residential					
Incumbent TSPs (excluding out-of-territory)	0.115	0.110	0.100	0.092	-7.3%
<i>Annual Growth</i>	-5.8%	-3.9%	-9.5%	-8.4%	
Incumbent TSPs (out-of-territory)	0.079	0.069	0.071	0.082	1.0%
<i>Annual Growth</i>	-5.0%	-12.7%	3.4%	14.1%	
Non-incumbent, alternative TSPs	0.059	0.058	0.054	0.052	-4.5%
<i>Annual Growth</i>	-8.7%	-2.5%	-5.9%	-4.9%	
Total residential	0.088	0.085	0.077	0.072	-6.2%
<i>Annual Growth</i>	-8.3%	-3.6%	-9.0%	-5.8%	
Business					
Incumbent TSPs (excluding out-of-territory)	0.066	0.067	0.067	0.059	-3.5%
<i>Annual Growth</i>	-11.7%	1.0%	0.8%	-11.7%	
Incumbent TSPs (out-of-territory)	0.043	0.038	0.037	0.028	-13.4%
<i>Annual Growth</i>	0.5%	-10.9%	-4.0%	-24.0%	
Non-incumbent, alternative TSPs	0.055	0.046	0.039	0.038	-11.1%
<i>Annual Growth</i>	-12.0%	-15.9%	-15.1%	-1.7%	
Total business	0.058	0.054	0.052	0.046	-7.1%
<i>Annual Growth</i>	-8.7%	-6.1%	-4.0%	-11.0%	
Retail					
Incumbent TSPs (excluding out-of-territory)	0.092	0.091	0.086	0.078	-5.6%
<i>Annual Growth</i>	-8.7%	-1.2%	-6.0%	-9.4%	
Incumbent TSPs (out-of-territory)	0.044	0.039	0.037	0.028	-13.4%
<i>Annual Growth</i>	0.6%	-11.3%	-4.0%	-23.7%	
Non-incumbent, alternative TSPs	0.058	0.054	0.049	0.047	-6.5%
<i>Annual Growth</i>	-9.6%	-6.8%	-8.2%	-4.5%	
Total retail	0.074	0.071	0.066	0.061	-6.3%
<i>Annual Growth</i>	-8.1%	-4.0%	-6.8%	-8.0%	

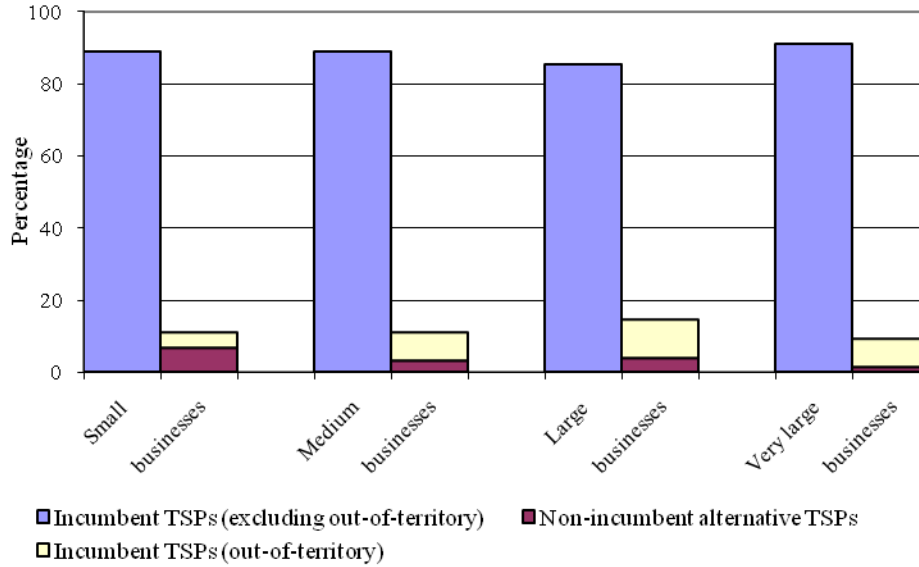
Source: CRTC data collection

Table 5.2.13 Large incumbent TSPs' retail long distance revenue market share, by region

Region	2006	2007	2008	2009	2010
B.C., Alberta	66%	75%	73%	74% #	68%
Saskatchewan	79%	86%	85%	84%	83%
Manitoba	84%	88%	83%	81% #	78%
Ontario, Quebec	57%	55%	56%	55% #	61%
Atlantic	79%	82%	81%	80%	81%

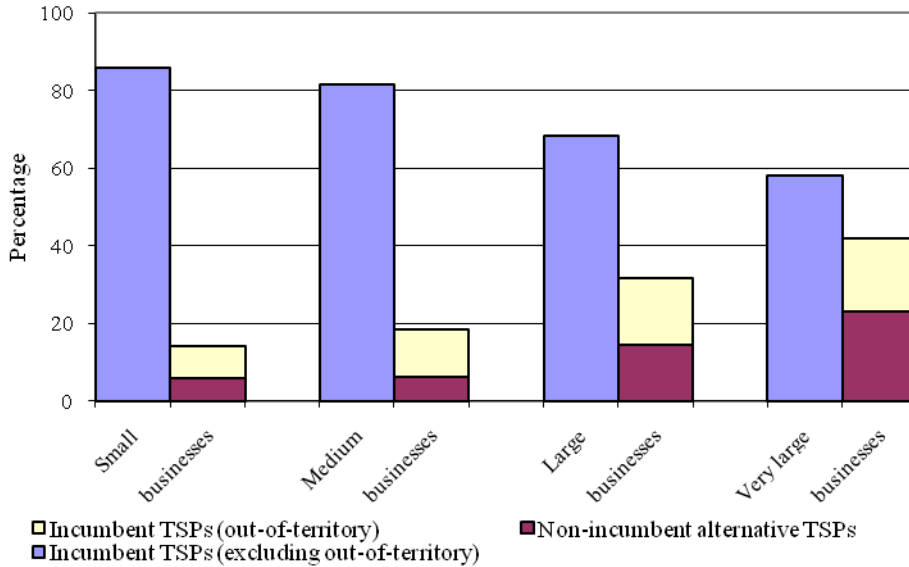
Source: CRTC data collection

Figure 5.2.5 Local business market revenue distribution, by customer size and type of provider (2010)



Source: CRTC data collection

Figure 5.2.6 Long distance business market revenue distribution, by customer size and type of provider (2010)



Source: CRTC data collection

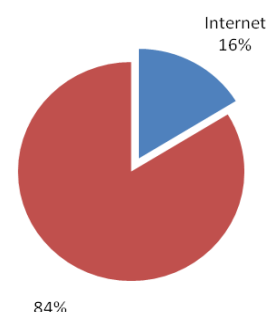
5.3 Internet market sector and broadband availability

Overview

The Internet access industry consists of an estimated 500 entities.

Incumbent TSPs provide Internet services using mainly dial-up, DSL, fibre optic, satellite, and fixed wireless facilities. Cable companies provide Internet services using cable modem, fibre optic, and fixed wireless facilities. Utility telcos, municipalities, and other TSPs provide Internet services using dial-up, DSL, fibre optic, satellite, and fixed wireless facilities. Resellers essentially rely on facilities-based TSPs to provide them with facilities on a wholesale basis. Resellers provide mainly dial-up Internet access service, as well as high-speed Internet service, generally using leased DSL facilities and, to a lesser extent, cable modem and fibre optic facilities.

Telecommunications revenues
\$41.7 billion
2010



Internet sector and broadband availability at a glance

	2009	2010	% Growth
Revenues (\$ billions)	6.5 #	6.8	4.2
Internet access and transport			
Residential	4.3	4.5	5.9
Business	1.1	1.2	10.7
Wholesale	0.3	0.3	-0.3
Other	0.9	0.8	-11.0
Residential subscribers (millions)	10.1	10.4	3.1
Residential high-speed access revenues per subscriber per month	\$36.06	\$36.99	
Internet access revenue market share			
Top 5 major ISPs (including affiliates)	76%	76%	
Cable operators	50%	50%	
ILECs (excluding out-of-territory)	38%	38%	
Residential broadband availability (excluding satellite)			
National	95%	96%	
Urban	100%	100%	
Rural	84%	85%	
National including HSPA+	-	98%	
Residential penetration: All speeds	75%	77%	
High-speed	72%	74%	
Broadband (1.5 Mbps and higher)	62%	70%	
Broadband (5 Mbps and higher)	44%	52%	
Average gigabytes downloaded per month per residential subscriber	12.0	14.8	
Average gigabytes uploaded per month per residential subscriber	3.4	3.7	
Monthly average residential high-speed service churn rate	1.57 #	1.62	3.11
Monthly average business high-speed service churn rate	1.56	1.56	-0.26

• The average gigabytes uploaded and downloaded are based on a weighted average of the 15 largest providers in Canada.
Source: CRTC data collection

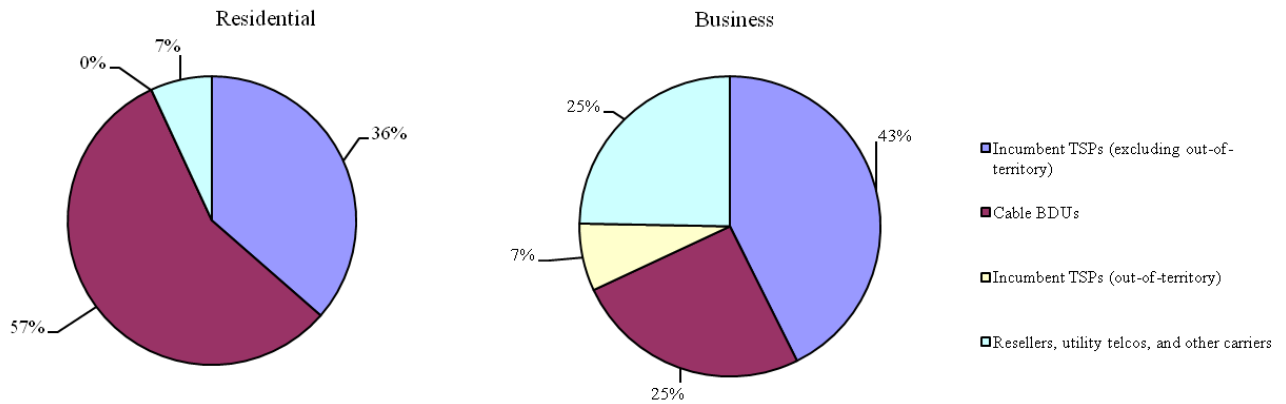
Statistical information – Internet market sector
Table 5.3.1 Internet revenues (\$ millions)

		2006	2007	2008	2009	2010	% growth 2009-2010	CAGR 2006-2010
Residential	Incumbent TSPs (excluding out-of-territory)							
	Dial-up	159	141	116	92	64	-30.3%	-20.4%
	High-speed	1,160	1,331	1,406	1,506	1,588	5.4%	8.2%
	Subtotal	1,319	1,469	1,522	1,598	1,652	3.4%	5.8%
	Cable BDUs							
	Dial-up	8	5	2	1	1	-23.3%	-39.4%
	High-speed	1,649	1,935	2,129	2,419	2,572	6.3%	11.8%
	Subtotal	1,657	1,940	2,131	2,420	2,573	6.3%	11.6%
	Incumbent TSPs (excluding out-of-territory) and cable BDUs subtotal							
	Dial-up	167	145	118	93	65	-30.2%	-34.2%
	High-speed	2,809	3,264	3,535	3,925	4,160	6.0%	10.3%
	Subtotal	2,976	3,409	3,654	4,018	4,225	5.1%	9.2%
	Other TSPs							
	Dial-up	112	83	71	48	31	-34.6%	-27.4%
High-speed	103	128	175	219	282	28.7%	28.6%	
Subtotal	215	214	245	267	313	17.4%	9.9%	
Total								
Dial-up	279	228	189	141	96	-31.7%	-23.4%	
High-speed	2,912	3,394	3,710	4,144	4,442	7.2%	11.1%	
Residential total	3,191	3,622	3,899	4,285	4,538	5.9%	9.2%	
Business	Incumbent TSPs (excluding out-of-territory)	406	434	457	444	478	7.6%	4.2%
	Cable BDUs	134	169	201	227	284	25.0%	20.7%
	Incumbent TSPs (excluding out-of-territory) and cable BDUs subtotal	540	604	657	671	762	13.5%	9.0%
	Other TSPs							
	Incumbent TSPs (out-of-territory)	98	112	98	93	81	-12.6%	-4.6%
	Resellers, utility telcos, and other carriers	236	223	241	255	282	10.7%	4.5%
	Other TSPs subtotal	335	335	339	348	364	4.5%	2.1%
	Business access total	874	938	997	1,019	1,125	10.4%	6.5%
Business transport total	50	73	76	67	77	15.2%	11.4%	
Business total	924	1,011	1,073	1,086	1,202	10.7%	6.8%	
Wholesale Access	Higher capacity access and transport	77	54	54	48	42	-12.2%	-14.1%
	Lower capacity access	125	147	161	213	218	2.3%	15.0%
	Wholesale total	202	201	215	261	260	-0.3%	6.6%
Other	Applications, equipment, and other Internet-related services	679 #	778 #	939 #	868 #	772	-11.0%	3.3%
	Grand total	4,996 #	5,613 #	6,126 #	6,499 #	6,772	4.2%	7.9%

- Wholesale Internet access and transport services are generally sold to ISPs. These services are used by the ISPs to provide Internet access service to their retail customers. Sales to non-ISP entities, such as VoIP service providers, are included in the wholesale revenues presented in Table 5.3.1 as “Higher capacity access and transport” revenues.
- “Lower capacity access” includes services such as Bell Canada's GAS, TCC's VPOP, DSL, and cable BDU-provided TPIA service, as well as satellite capacity and dial-up bundled with Internet access sold to ISPs.
- In previous years, modem rental fees for residential service were included with Internet access service revenues. However, the fees are no longer included as of 2008. In 2008, the fees were approximately \$121 million.

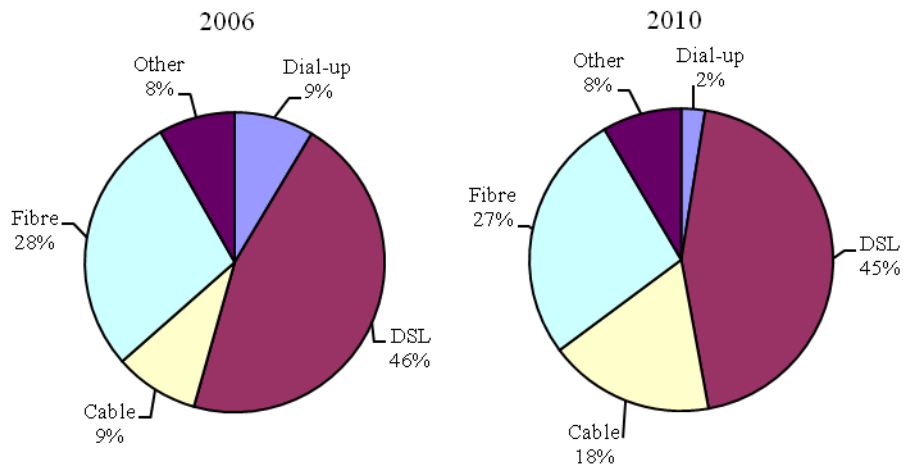
Source: CRTC data collection

Figure 5.3.1 Internet access revenue share, by type of entity, 2010



Source: CRTC data collection

Figure 5.3.2 Business Internet access revenues, by access technology (2006 v. 2010)



• “Other” includes the remaining technologies, such as (but not limited to) ISDN, fixed wireless, and satellite technologies.
 Source: CRTC data collection

Table 5.3.2 Residential Internet subscribers, by type of TSP

		2006	2007	2008	2009	2010	CAGR 2006-2010
Incumbent TSPs (excluding out-of-territory)							
Dial-up		642	566	433	286	210	-24.4%
	<i>% annual growth</i>		-11.8	-23.5	-33.9	-26.6	
	<i>% share of total dial-up</i>	51.8	60.6	59.1	58.8	57.3	
High-speed		3,095	3,405	3,584	3,673	3,762	5.0%
	<i>% annual growth</i>		10.0	5.3	2.5	2.4	
	<i>% share of total high-speed</i>	41.5	40.7	39.5	38.4	37.6	
Subtotal		3,736	3,971	4,017	3,959	3,972	1.5%
	<i>% annual growth</i>		6.3	1.2	-1.4	0.3	
	<i>% share of total</i>	42.9	42.7	40.9	39.3	38.3	
Cable BDUs							
Dial-up		38	18	18	14	10	-27.7%
	<i>% annual growth</i>		-53.8	1.9	-24.4	-23.0	
	<i>% share of total dial-up</i>	3.1	1.9	2.4	2.8	2.8	
High-speed		4,041	4,573	4,990	5,358	5,642	8.7%
	<i>% annual growth</i>		13.2	9.1	7.4	5.3	
	<i>% share of total high-speed</i>	54.2	54.7	55.0	56.0	56.4	
Subtotal		4,079	4,590	5,008	5,372	5,653	8.5%
	<i>% annual growth</i>		12.5	9.1	7.3	5.2	
	<i>% share of total</i>	46.9	49.5	51.1	53.4	54.5	
Incumbent TSPs (excluding out-of-territory) and cable BDUs subtotal							
Dial-up		680	584	451	299	220	-24.5%
	<i>% annual growth</i>		-14.1	-22.8	-33.6	-26.5	
	<i>% share of total dial-up</i>	54.8	62.5	61.6	61.6	60.1	
High-speed		7,136	7,978	8,574	9,031	9,404	7.1%
	<i>% annual growth</i>		11.8	7.5	5.3	4.1	
	<i>% share of total high-speed</i>	95.6	95.5	94.5	94.3	94.0	
Subtotal		7,815	8,561	9,024	9,331	9,625	5.3%
	<i>% annual growth</i>		9.5	5.4	3.4	3.1	
	<i>% share of total</i>	89.8	92.2	92.0	92.7	92.8	
Other TSPs							
Dial-up		560	350	281	187	146	-28.5%
	<i>% annual growth</i>		-37.4	-19.7	-33.6	-21.7	
	<i>% share of total dial-up</i>	45.2	37.5	38.4	38.4	39.9	
High-speed		327	379	503	545	604	16.6%
	<i>% annual growth</i>		16.0	32.9	8.2	10.8	
	<i>% share of total high-speed</i>	4.4	4.5	5.5	5.7	6.0	
Subtotal		886	729	785	731	750	-4.1%
	<i>% annual growth</i>		-17.7	32.9	8.2	2.5	
	<i>% share of total</i>	10.2	7.8	8.0	7.3	7.2	
Total							
Dial-up		1,239	934	732	486	366	-26.3%
	<i>% annual growth</i>		-24.7	-21.6	-33.6	-24.6	
	<i>% share of total</i>	14.2	10.0	7.5	4.8	3.5	
High-speed		7,461	8,356	9,077	9,576	10,008	7.6%
	<i>% annual growth</i>		12.0	8.6	5.5	4.5	
	<i>% share of total</i>	85.8	90.0	92.5	95.2	96.5	
Grand total		8,700	9,290	9,809	10,062	10,375	4.5%
	<i>% annual growth</i>		6.8	5.6	2.6	3.1	

Source: CRTC data collection

Table 5.3.3 Residential Internet plans and pricing (part 1 of 2)

	2006	2007	2008	2009	2010
Downstream speed	One-month revenue (%)				
Lite and wideband up to 256 Kbps	6.6%	6.8%	2.9%	0.6% #	0.2%
Wideband 300 to 1400 Kbps	11.9%	12.2%	15.1%	8.6% #	4.3%
Broadband					
1.5 to 4 Mbps	14.7%	14.0%	17.3%	20.9% #	20.9%
5 to 9 Mbps	60.3%	58.0%	53.6%	46.5% #	49.1%
10 to 15 Mbps	6.3%	8.7%	10.8%	22.4% #	22.8%
16 to 100 Mbps	0.2%	0.2%	0.3%	1.0%	2.7%
Total sample	242.1	268.9	306.4	320.7#	350.0
Downstream speed	Subscribers (%)				
Lite and wideband up to 256 Kbps	10.1%	10.0%	4.3%	1.1% #	0.3%
Wideband 300 to 1400 Kbps	14.7%	15.3%	19.8%	12.2% #	5.8%
Broadband					
1.5 to 4 Mbps	15.1%	15.3%	17.0%	24.5% #	24.2%
5 to 9 Mbps	54.8%	52.5%	50.1%	42.6% #	45.3%
10 to 15 Mbps	5.2%	6.8%	8.6%	19.0% #	22.4%
16 to 100 Mbps	0.1%	0.1%	0.2%	0.6%	2.0%
Total sample	6,880.3	7,576.6	8,184.4	8,516.8#	8,983.1
Downstream speed	Average revenue per subscriber				
Lite and wideband up to 256 Kbps	\$22.91	\$24.37	\$24.86	\$19.55#	\$25.18
Wideband 300 to 1400 Kbps	\$28.30	\$28.29	\$28.57	\$26.84	\$28.87
Broadband					
1.5 to 4 Mbps	\$34.24	\$32.53	\$38.22	\$32.46	\$33.57
5 to 9 Mbps	\$38.74	\$39.26	\$40.00	\$41.14#	\$42.23
10 to 15 Mbps	\$43.17	\$45.23	\$47.06	\$44.43	\$39.67
16 to 100 Mbps	\$81.30	\$51.17	\$63.06	\$65.08	\$53.71
Total sample	\$35.18	\$35.50	\$37.44	\$37.80#	\$38.96
Downstream speed	Weighted-average upload speed (Kbps)				
Lite and wideband up to 256 Kbps	94	118	131	152#	209
Wideband 300 to 1400 Kbps	306	294	286	267#	352
Broadband					
1.5 to 4 Mbps	537	537	809	656#	584
5 to 9 Mbps	619	677	744	723#	870
10 to 15 Mbps	742	815	862	751	797
16 to 100 Mbps	1,006	1,000	1,120	1,085	1,735
Total sample	514	552	649	652#	769
Weighted-average download speed	3,826	4,227	4,928	5,945#	7,060

Table 5.3.3 Residential Internet plans and pricing (part 2 of 2)

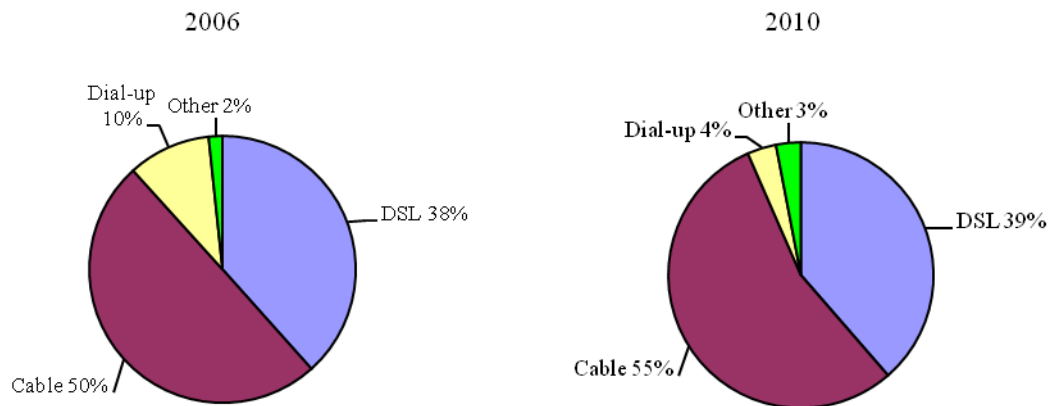
	2006	2007	2008	2009	2010
Downstream speed	Weighted-average upload/download limit in gigabytes (GB)				
Lite and wideband up to 256 Kbps	-	-	8.50	11.75	-
Wideband 300 to 1400 Kbps	-	-	8.75	3.04	7.20
Broadband					
1.5 to 4 Mbps	-	-	43.25	32.20	22.13
5 to 9 Mbps	-	-	54.18	42.80	45.27
10 to 15 Mbps	-	-	80.81	69.53	74.28
16 to 25 Mbps	-	-	101.91	104.14	112.94
Total sample	-	-	42.34	40.32	45.04

1. Weighted average download limits are calculated only for those plans that have limits.

2. 2008, 2009 and 2010 data excludes terminal rental revenues.

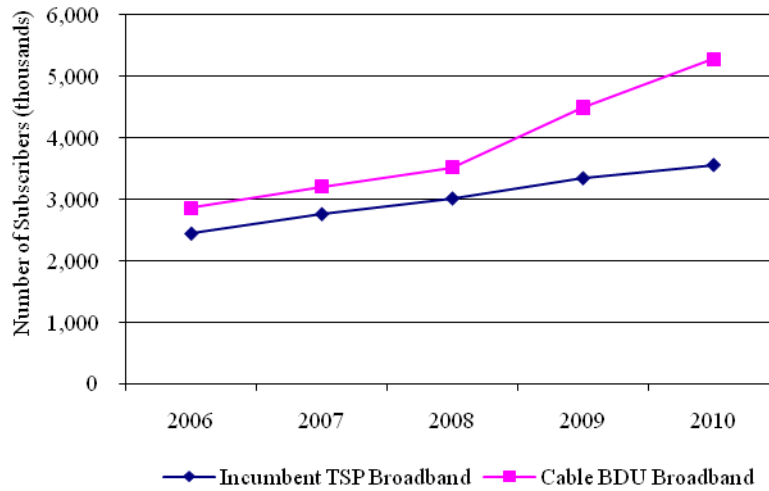
Source: CRTC data collection

Figure 5.3.3 Residential Internet access technology mix (2006 v. 2010)



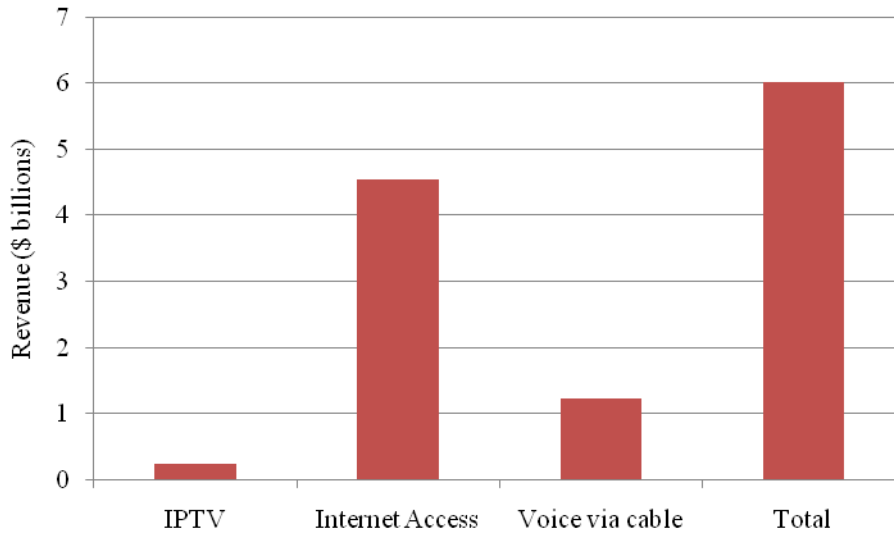
Source: CRTC data collection

Figure 5.3.4 Broadband (greater than 1.5 Mbps) subscriptions



Source: CRTC data collection

Figure 5.3.5 Residential Internet Protocol provisioned service revenues



Source: CRTC data collection

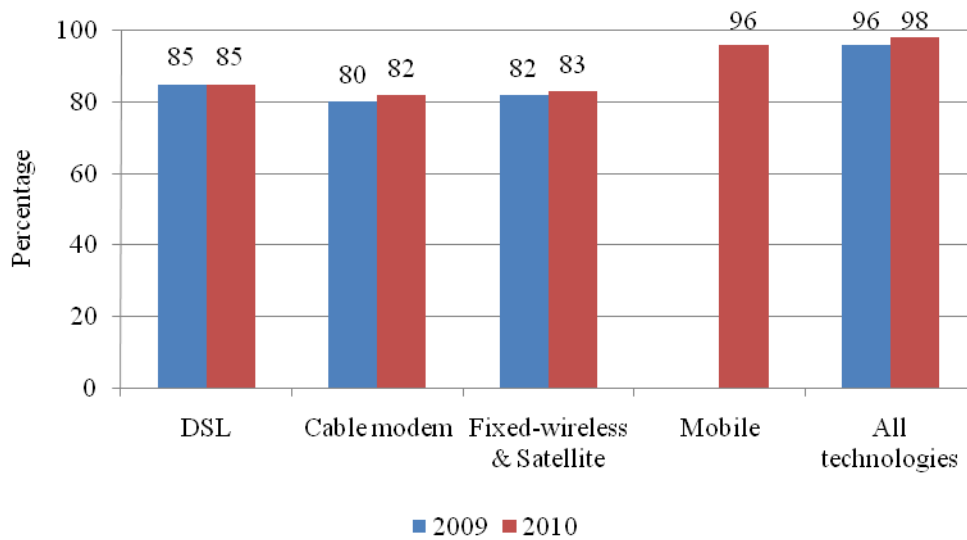
Broadband availability - Statistical information

Table 5.3.4 Key telecommunications availability indicators

Platform	Availability (% of households)				
	2006	2007	2008	2009	2010
Mobile broadband					
3G / 3G equivalent	na	78	91	96	98
HSPA+	na	na	na	na	97
Landline broadband					
DSL	na	na	84	85	85
Cable modem	na	na	80	80	82
Fixed wireless	na	na	80 #	81 #	82
IPTV	8	10	10	21 #	22
Digital satellite	National	National	National	National	National

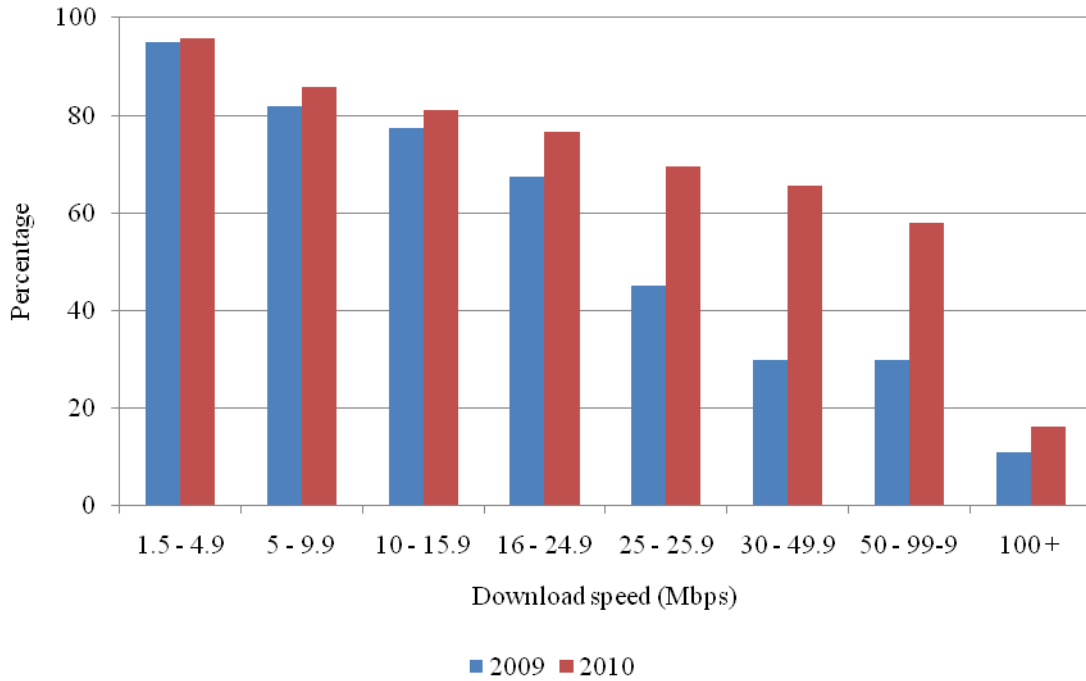
• IPTV availability from 2006 to 2009 is as of 31 August. In 2010 the availability is as of 31 December.
 Source: CRTC data collection

Figure 5.3.6 Broadband availability (percentage of households, 2010)



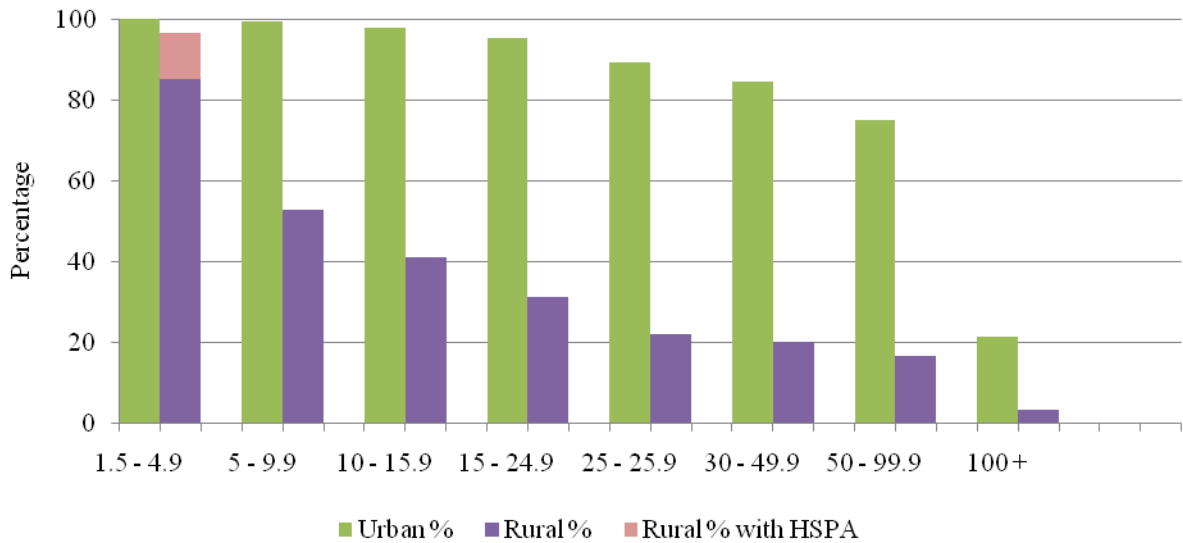
Source: CRTC data collection

Figure 5.3.7 Broadband availability, by speed (2010 v. 2009, percentage of households)



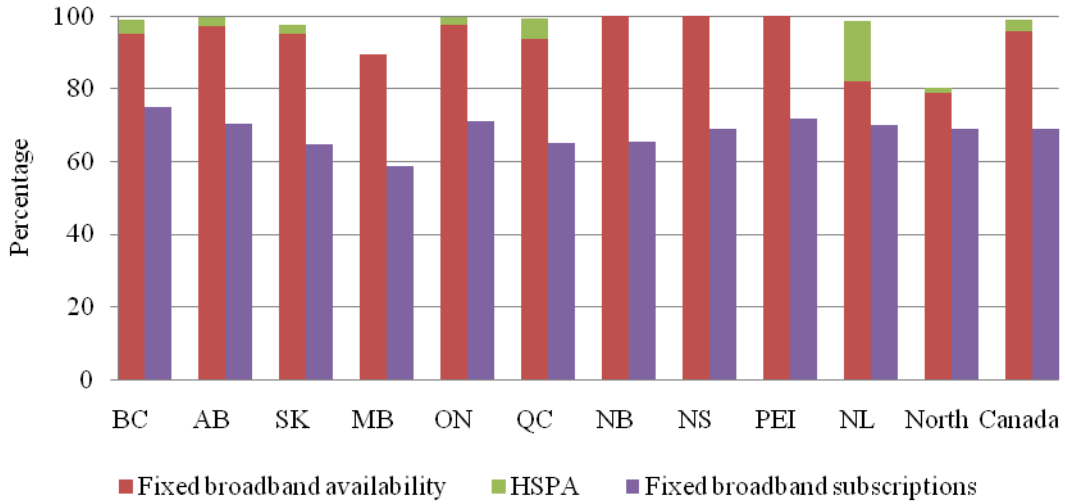
• Excludes HSPA
 Source: Industry Canada and CRTC data collection

Figure 5.3.8 Broadband availability – Urban v. rural (percentage of households) (2010)



Source: Industry Canada and CRTC data collection

Figure 5.3.9 Broadband availability v. broadband subscriptions (2010)



Source: Industry Canada and CRTC data collection

Table 5.3.5 Number of households that can have broadband access (thousands)

Province	2008	2009	2010
British Columbia	1,659	1,691	1,731
Alberta	1,339	1,368	1,388
Saskatchewan	389	394	400
Manitoba	424 #	429 #	434
Ontario	4,738	4,812	4,853
Quebec	3,028	3,062	3,145
New Brunswick	257	304	305
Nova Scotia	387	388	389
Prince Edward Island	54	55	56
Newfoundland and Labrador	155	155	163
North	26	26	30
Canada	12,456 #	12,684 #	12,895

Source: CRTC data collection

Table 5.3.6 Broadband availability, by speed and province (2010, percentage of households)

Province	1.5 - 5 Mbps	5 – 10 Mbps	10 - 16 Mbps	16 - 25 Mbps	25-100 Mbps
British Columbia	95%	91%	90%	81%	69%
Alberta	97%	85%	84%	82%	75%
Saskatchewan	95%	73%	63%	54%	54%
Manitoba	89%	80%	58%	54%	54%
Ontario	98%	89%	85%	81%	72%
Quebec	94%	84%	80%	79%	73%
New Brunswick	100%	81%	72%	71%	71%
Nova Scotia	100%	79%	71%	50%	50%
Prince Edward Island	99%	71%	54%	44%	44%
Newfoundland and Labrador	82%	77%	64%	40%	40%

- Excludes HSPA
 - Availability or speed greater than 25 Mbps have been combined due to the confidentiality of the data
- Source: CRTC data collection

Table 5.3.7 Connected buildings with DS3 connections or higher in 32 major centres, by province

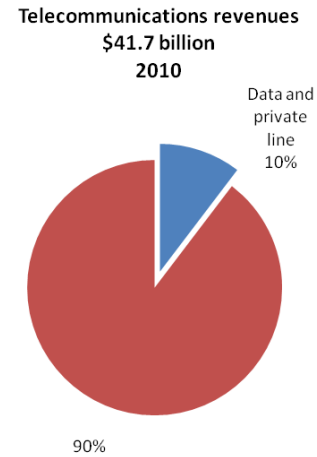
Province (number of major centres)	Number of buildings of interest	Percent with a DS3 connection or higher
British Columbia (4)	15,096	17%
Alberta (4)	12,557	24%
Saskatchewan (2)	2,842	20%
Manitoba (1)	3,575	7%
Ontario (10)	40,751	13%
Quebec (5)	31,617	17%
New Brunswick (3)	1,901	18%
Nova Scotia (1)	1,661	24%
Prince Edward Island (1)	447	27%
Newfoundland & Labrador (1)	1,415	14%
Canada	111,862	16%
	Incumbent	Competitor
Connection provider	62%	55%

- “Buildings of interest” refers to buildings that have occupants with an industry classification that generally demands a DS3 connection, or higher, for their operations. Examples include office buildings, health services buildings, malls and shopping centres, large manufacturing, large warehouses, buildings containing professional and educational services, financial institutions, securities and commodity brokers, large museums, large insurance, telecommunications and other communications, large airports, large marine port, large freight transportation, large transportation services, and large hotels.
 - Major centres included: Abbotsford, Barrie, Calgary, Charlottetown, Chicoutimi, Edmonton, Fredericton, Halifax, Hamilton, Kelowna, Kingston, Kitchener-Waterloo, Lethbridge, London, Moncton, Montréal, Oshawa, Ottawa–Gatineau, Québec City, Red Deer, Regina, Saint John, Saint John’s, Saskatoon, Sherbrooke, St Catharines–Niagara, Toronto, Trois-Rivières, Windsor, Winnipeg, Victoria and Vancouver.
 - Analysis based on buildings with postal codes that cover less than 40,000 square metres.
- Source: CRTC Data Collection

5.4 Data and private line market sector

Overview

Approximately 150 entities offered data and private line services in 2010. Of these, incumbent TSPs accounted for approximately 40%, and alternative TSPs, such as cable BDUs, utility telcos, and resellers, accounted for the remaining 60%.



Data and private line sector at a glance

	2009	2010	% Growth
Revenues (\$ billions)	4.3	4.3	-0.0
Data	2.7	2.8	3.7
Private line	1.6	1.5	-6.1
Private line revenues as a percent of total	37.9%	35.6%	
New data protocols			
Revenues (\$ billions)	1.7	1.8	8.2
Percent of total data protocol revenues	84.2%	89.5%	
Data and private line revenue market share			
Incumbent TSPs (excluding out-of-territory) ¹	65%	69%	
Forborne services			
Percent of data revenues from forborne data services	94%	91%	
Percent of private line revenues from forborne private line services	63%	65%	
Number of forborne private line routes	3,800	4,823	26.9

1. Due to changes in company reporting, incumbent TSPs (out-of-territory) 2010 results may not be compatible with previous years.
Source: CRTC data collection

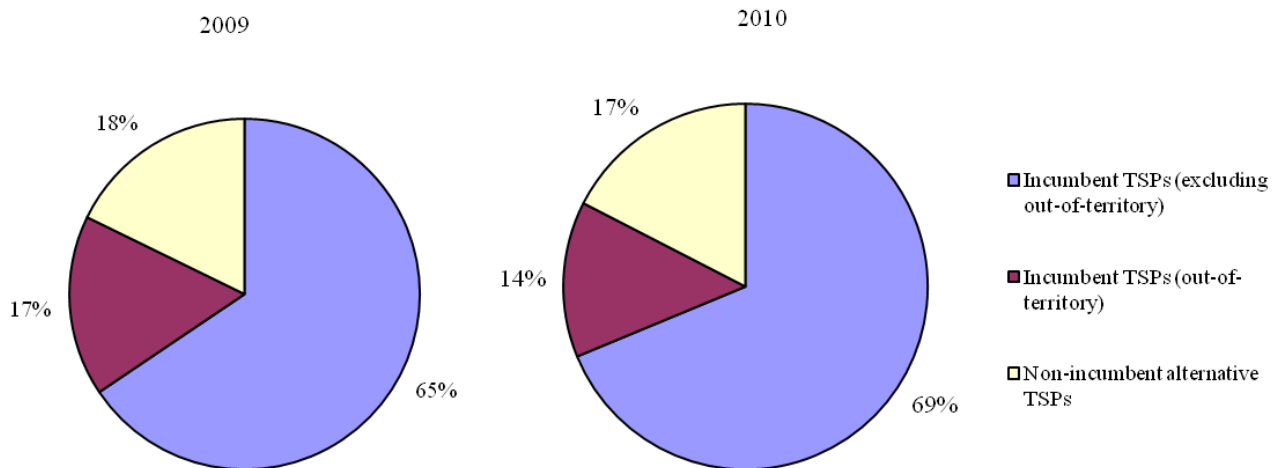
Data and private line market sector– Statistical information

Table 5.4.1 Data and private line revenues (\$ millions)

	2006	2007	2008	2009	2010	CAGR 2006-2010
Data						
Data protocols	1,604	1,769	1,890	2,020	2,055	6.4%
<i>Annual Growth</i>	18.6%	10.3%	6.9%	6.8%	1.8%	
Other	700	704	723	658	723	0.8%
<i>Annual Growth</i>	-20.9%	0.5%	2.8%	-9.0%	9.8%	
Total data and other						
	2,304	2,472	2,614	2,678	2,778	4.8%
<i>Annual Growth</i>	3.0%	7.3%	5.7%	2.5%	3.7%	
Private Line						
Short-haul	649	717	737	674	584	-2.6%
<i>Annual Growth</i>	-17.6%	10.4%	2.8%	-8.5%	-13.4%	
Long-haul	1,016	964	985	961	952	-1.6%
<i>Annual Growth</i>	-4.7%	-5.2%	2.3%	-2.4%	-1.0%	
Total private line						
	1,665	1,680	1,722	1,636	1,536	-2.0%
<i>Annual Growth</i>	-10.2%	0.9%	2.5%	-5.0%	-6.1%	
Total data and private line						
	3,969	4,153	4,336	4,313	4,314	2.1%
<i>Annual Growth</i>	-3.0%	4.6%	4.4%	-0.5%	0.0%	

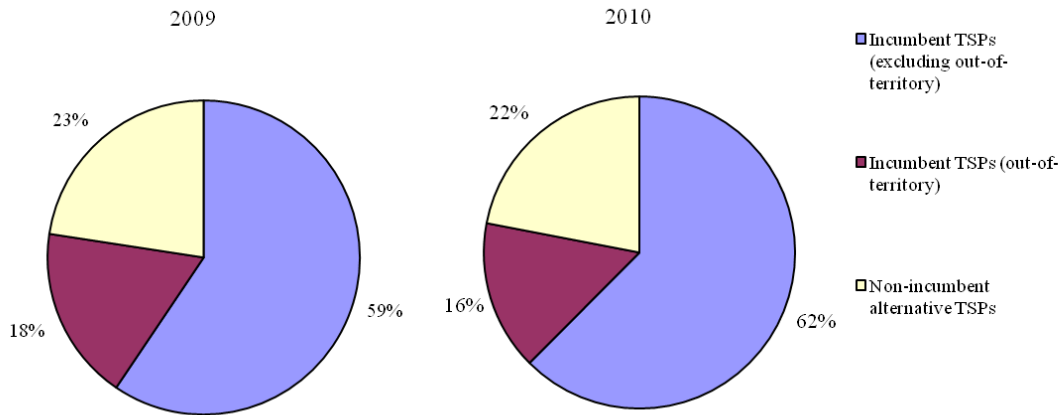
- Data services are classified into one of three categories: (1) legacy data protocols such as X.25, ATM, and frame relay, (2) newer protocols such as Ethernet and IP-VPN, and other protocols including managed services where specific protocols cannot be separated (3) other services such as network management, and networking equipment.
 - Inclusion of ‘other protocols’ with newer protocols has resulted in a restatement of data protocols and ‘other’ in previous years.
- Source: CRTC data collection

Figure 5.4.1 Data and private line revenue market share, by type of TSP



Source: CRTC data collection

Figure 5.4.2 Data revenue market share, by type of TSP



Source: CRTC data collection

Table 5.4.2 Data protocol revenues, by service category (\$ millions)

	2006	2007	2008	2009	2010	CAGR 2006-2010
New protocols						
Retail						
Ethernet	469.9	488.5	520.7	482.3	451.4	-1.0%
<i>Annual Growth</i>		4.0%	6.6%	-7.4%	-6.4%	
IP-VPN	362.9	535.2	710.1	870.8	995.9	28.7%
<i>Annual Growth</i>		47.5%	32.7%	22.6%	14.4%	
Other	78.0	103.9	77.5	126.4	118.9	11.1%
<i>Annual Growth</i>		33.2%	-25.4%	63.0%	-5.9%	
Total retail	910.8	1,127.5	1,308.4	1,479.5	1,566.2	14.5%
<i>Annual Growth</i>		23.8%	16.0%	13.1%	5.9%	
Wholesale						
Ethernet	86.7	90.0	122.4	173.2	196.8	22.8%
<i>Annual Growth</i>		3.9%	36.0%	41.5%	13.7%	
IP-VPN	11.0	11.3	17.4	11.8	41.7	39.5%
<i>Annual Growth</i>		2.4%	54.6%	-32.3%	253.5%	
Other	30.8	62.4	37.5	35.1	35.0	3.2%
<i>Annual Growth</i>		102.3%	-39.8%	-6.4%	-0.3%	
Total wholesale	128.5	163.7	177.4	220.1	273.6	20.8%
<i>Annual Growth</i>		27.3%	8.4%	24.1%	24.3%	
Total new protocols	1,039.3	1,291.2	1,485.7	1,699.7	1,839.8	15.3%
<i>Annual Growth</i>		24.2%	15.1%	14.4%	8.2%	
Legacy protocols						
Retail						
Ethernet	509.0	415.2	343.8	264.2	173.6	-23.6%
<i>Annual Growth</i>		-18.4%	-17.2%	-23.2%	-34.3%	
Wholesale						
Ethernet	55.8	62.4	60.7	55.7	41.5	-7.1%
<i>Annual Growth</i>		11.8%	-2.6%	-8.3%	-25.4%	
Total legacy	564.8	477.5	404.6	319.9	215.2	-21.4%
<i>Annual Growth</i>		-15.5%	-15.3%	-20.9%	-32.7%	
Total data protocols	1,604.1	1,768.7	1,890.3	2,019.5	2,055.0	6.4%
<i>Annual Growth</i>		10.3%	6.9%	6.8%	1.8%	

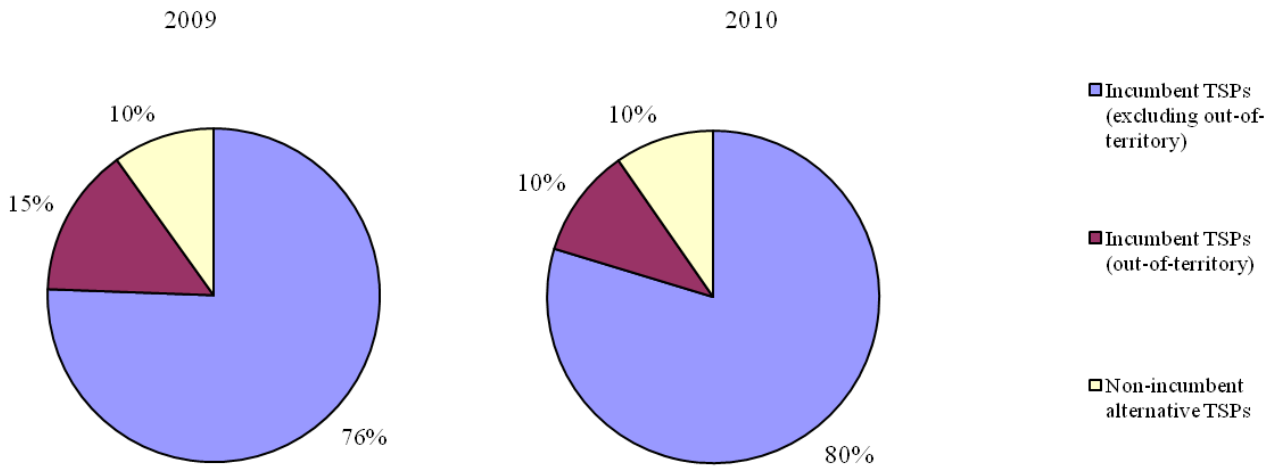
Source: CRTC data collection

Table 5.4.3 Data protocol revenue market share, by service category (%)

	2006	2007	2008	2009	2010 ¹
New data					
Incumbent TSPs (excluding out-of-territory)	56%	50%	50%	51%	59%
Incumbent TSPs (out-of-territory)	29%	33%	24%	25%	17%
Non-incumbent alternative TSPs	16%	17%	26%	23%	24%
Legacy data					
Incumbent TSPs (excluding out-of-territory)	59%	57%	60%	59%	62%
Incumbent TSPs (out-of-territory)	19%	16%	13%	12%	7%
Non-incumbent alternative TSPs	23%	26%	26%	29%	31%
Total data protocols					
Incumbent TSPs (excluding out-of-territory)	57%	52%	52%	52%	59%
Incumbent TSPs (out-of-territory)	25%	28%	22%	23%	16%
Non-incumbent alternative TSPs	18%	19%	26%	24%	25%

- Other protocols were included in incumbent TSPs (excluding out-of-territory) and non-incumbent alternative TSP for previous years, resulting in a restatement of previous years
 - 1. Due to changes in company reporting, Incumbent TSPs (out-of-territory) results are not consistent with previous years. In addition, ‘Other Protocols’ were not separately reported for incumbent TSPs (out-of-territory) before 2010. This has less than a 2% impact on the results in 2010.
- Source: CRTC data collection

Figure 5.4.3 Private line revenue market share, by type of TSP



Source: CRTC data collection

Table 5.4.4 Private line revenues, by service category (\$ millions)

	2006	2007	2008	2009	2010	CAGR 2006-2010
Private line						
Retail						
Short-haul	431	430	357	322	307	-8.1%
<i>Annual Growth</i>	-14.3%	-0.3%	-16.9%	-9.9%	-4.5%	
Long-haul	634	576	536	521	500	-5.8%
<i>Annual Growth</i>	-3.9%	-9.1%	-6.9%	-2.9%	-4.0%	
Total retail private line	1,065	1,006	894	843	807	-6.7%
<i>Annual Growth</i>	-8.4%	-5.6%	-11.2%	-5.7%	-4.2%	
Wholesale						
Short-haul	217	287	380	352	277	6.3%
<i>Annual Growth</i>	-23.9%	32.2%	32.4%	-7.2%	-21.4%	
Long-haul	382	387	449	440	452	4.3%
<i>Annual Growth</i>	-5.9%	1.4%	15.8%	-1.9%	2.7%	
Total wholesale private line	599	674	828	793	729	5.0%
<i>Annual Growth</i>	-13.3%	12.6%	22.9%	-4.3%	-8.0%	
Total private line	1,665	1,680	1,722	1,636	1,536	-2.0%
<i>Annual Growth</i>	-10.2%	0.9%	2.5%	-5.0%	-6.1%	

Source: CRTC data collection

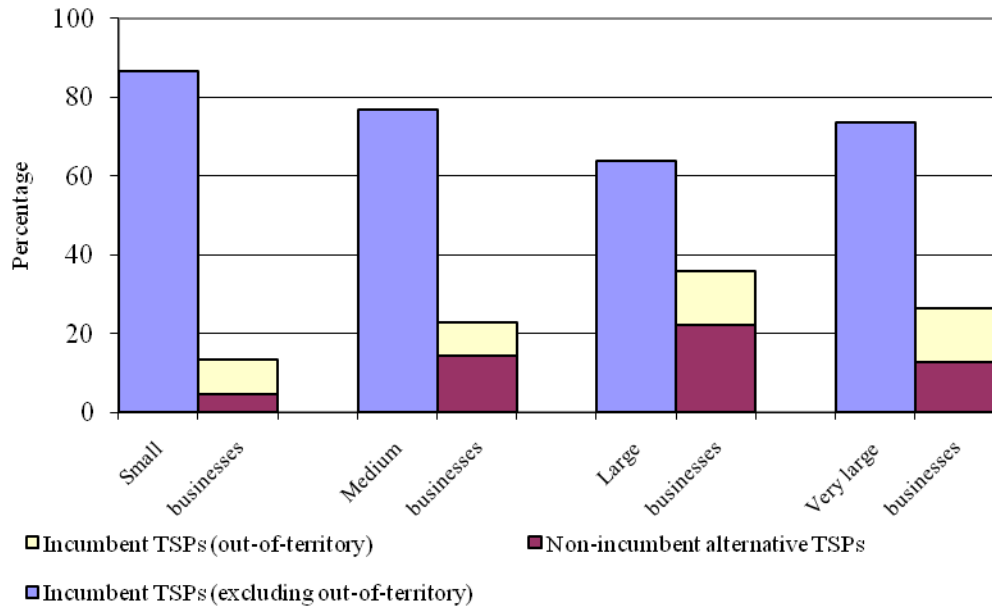
Table 5.4.5 Private line - Short-haul and long-haul revenue market share (%)

	2006	2007	2008	2009	2010 ¹
Short-haul					
Incumbent TSPs (excluding out-of-territory)	84	84	82	78	79
Incumbent TSPs (out-of-territory)	14	13	15	15	15
Non-incumbent alternative TSPs	2	3	4	6	6
Long-haul					
Incumbent TSPs (excluding out-of-territory)	78	65	68	74	81
Incumbent TSPs (out-of-territory)	11	20	18	14	8
Non-incumbent alternative TSPs	10	15	14	12	11
Total					
Incumbent TSPs (excluding out-of-territory)	80	73	74	76	80
Incumbent TSPs (out-of-territory)	13	17	16	14	10
Non-incumbent alternative TSPs	7	10	10	10	10

1. Due to changes in company reporting, incumbent TSPs (out-of-territory) 2010 results may not be compatible with previous years.

Source: CRTC data collection

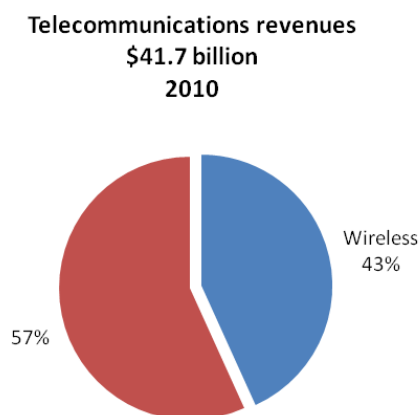
Figure 5.4.4 Data and private line service revenue distribution, by customer size and type of provider (2010)



Source: CRTC data collection

5.5 Wireless market sector

The wireless network covers approximately 20% of Canada's geographic area and is available to 99% of Canadians. The advanced wireless network which supports handsets such as smartphones and turbo sticks, is available to 97% of Canadians. Wireless market sector revenues are the largest component (43%) of total telecommunications revenues.



The wireless market sector consists of three large facilities-based national WSPs, a number of smaller regional facilities-based WSPs, and a small number of MVNOs.

A number of new facilities-based WSPs have recently entered, or have announced that they plan to enter, the wireless market sector.

Wireless sector at a glance

	2009	2010	% growth
Revenues (\$ billions)	16.8	18.0	6.6
Number of subscribers (millions)	23.8	25.8	8.5
Average revenues (excluding paging)			
ARPU per month	\$58.81	\$57.86	-1.6
ARPM	\$0.10	\$0.10	0.0
Wireless capex/Total telecom capex	29%	22%	
Average capital expenditure per user	\$8	\$6	-26.2
Availability (population)			
Wireless	99%	99%	
3G availability	96%	98%	
HSPA+	na	97%	
Penetration (household)			
Wireless	77%	n.a.	
Wireless only	10%	n.a.	

Sources: CRTC data collection and Statistics Canada

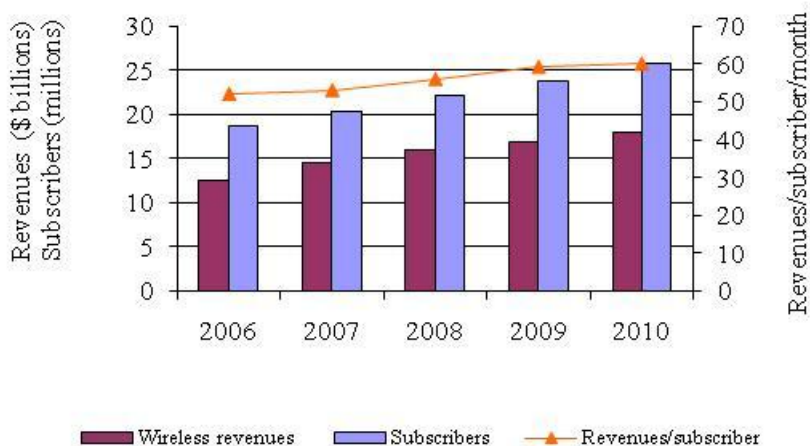
Wireless sector – Statistical information

Table 5.5.1 Wireless and paging revenues and number of subscribers

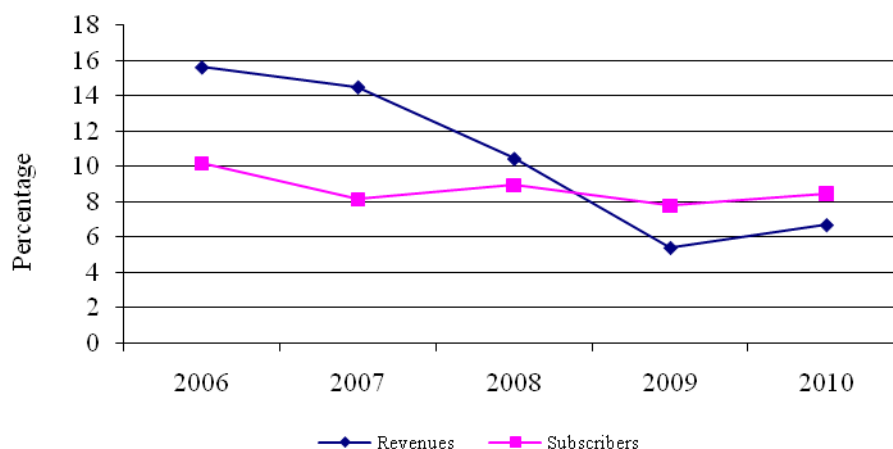
	2006	2007	2008	2009	2010	CAGR 2006-2010
Revenue (\$ millions)						
Wireless	12,600.1	14,430.0	15,940.3	16,804.0	17,931.2	9.2%
<i>Annual growth</i>	15.6%	14.5%	10.5%	5.4%	6.7%	
Paging	96.1	92.8	96.1	89.2	71.8	-7.0%
<i>Annual growth</i>	-20.5%	-3.4%	3.5%	-7.2%	-19.5%	
Total revenues	12,696.2	14,522.8	16,036.4	16,893.2	18,003.0	9.1%
<i>Annual growth</i>	15.2%	14.4%	10.4%	5.3%	6.6%	
Subscribers (thousands)						
Wireless	18,749.1	20,277.4	22,092.5	23,811.9	25,825.4	8.3%
<i>Annual growth</i>	10.2%	8.2%	9.0%	7.8%	8.5%	
Paging	504.6	390.4	319.3	253.6	187.5	-21.9%
<i>Annual growth</i>	-18.2%	-22.6%	-18.2%	-20.6%	-26.1%	

Source: CRTC data collection

Figure 5.5.1 Wireless revenues, subscribers, and revenues per subscriber (excluding paging)



Source: CRTC data collection

Figure 5.5.2 Wireless revenue and subscriber growth rates (excluding paging)


Source: CRTC data collection

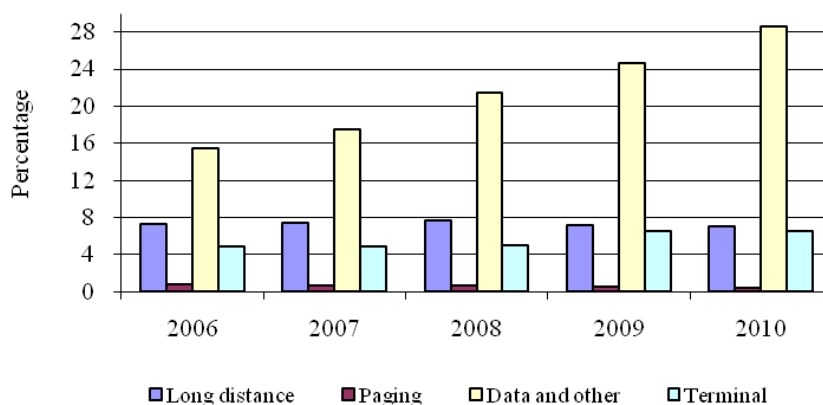
Table 5.5.2 Wireless and paging revenues components (\$ millions)

	2006	2007	2008	2009	2010	CAGR 2006-2010
Basic voice	9,110.1	10,117.0	10,481.9	10,323.5	10,343.7	3.2%
<i>Annual growth</i>	11.5%	11.1%	3.6%	-1.5%	0.2%	
Long distance	918.8	1,075.7	1,224.0	1,204.9	1,276.5	8.6%
<i>Annual growth</i>	19.2%	17.1%	13.8%	-1.6%	5.9%	
Paging	96.1	92.8	96.1	89.2	71.9	-7.0%
<i>Annual growth</i>	-20.5%	-3.4%	3.5%	-7.2%	-19.5%	
Terminal	611.4	699.5	803.0	1,106.3	1,171.8	17.7%
<i>Annual growth</i>	-8.1%	14.4%	14.8%	37.8%	5.9%	
Data and other						
Data	n.a.	n.a.	n.a.	n.a.	3,885.7	na
Roaming						
Voice	n.a.	n.a.	n.a.	n.a.	776.1	na
Data	n.a.	n.a.	n.a.	n.a.	390.6	na
Total roaming	n.a.	n.a.	n.a.	n.a.	1,166.7	na
Other	n.a.	n.a.	n.a.	n.a.	86.9	na
Total data and other	1,959.7	2,537.7	3,431.4	4,169.2	5,139.3	27.3%
<i>Annual growth</i>	52.3%	29.5%	35.2%	21.5%	23.3%	
Total	12,696.2	14,522.8	16,036.4	16,893.2	18,003.0	9.1%
<i>Annual growth</i>	15.2%	14.4%	10.4%	5.3%	6.6%	

• n/a: data not available

Source: CRTC data collection

Figure 5.5.3 Revenues by major component (excluding basic voice)



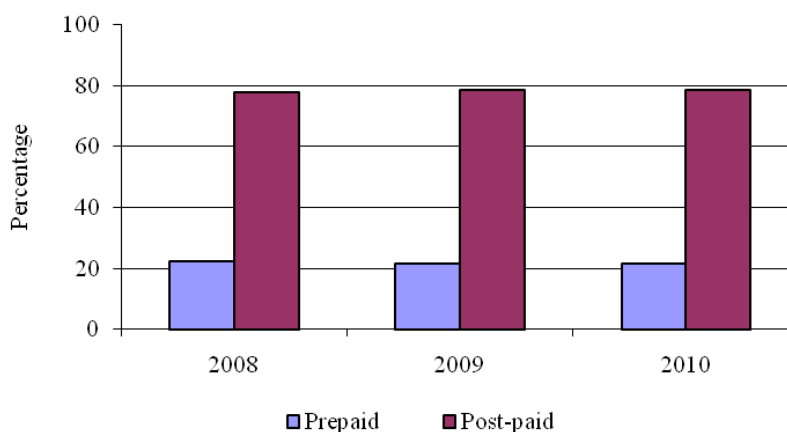
Source: CRTC data collection

Table 5.5.3 Prepaid and post-paid wireless revenues (basic voice and long distance) (\$ millions)

	2006	2007	2008	2009	2010	<i>CAGR 2006-2010</i>
Prepaid	738.9	934.6	912.9	846.4	851.5	3.6%
<i>Annual growth</i>	11.7%	26.5%	-2.3%	-7.3%	0.6%	
Post-paid	9,235.2	10,211.0	10,745.7	10,610.6	10,768.7	3.9%
<i>Annual growth</i>	12.0%	10.6%	5.2%	-1.3%	1.5%	
Total	9,974.1	11,145.9	11,658.6	11,456.9	11,620.2	3.9%
<i>Annual growth</i>	12.0%	11.7%	4.6%	-1.7%	1.4%	

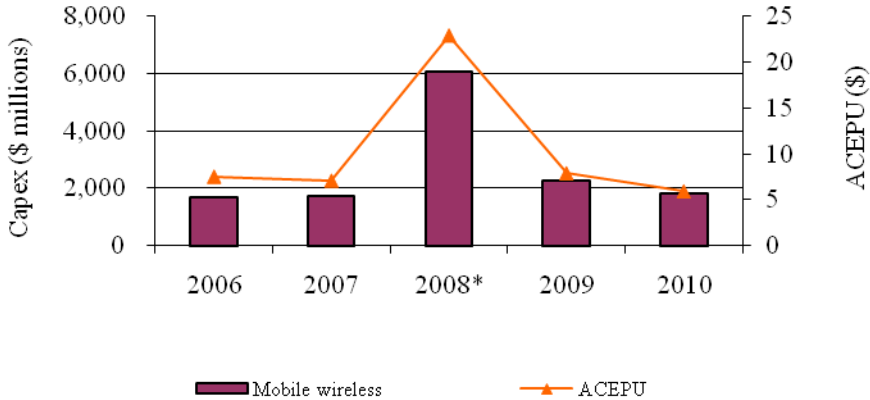
Source: CRTC data collection

Figure 5.5.4 Number of prepaid and post-paid subscribers as a percentage of total wireless subscribers



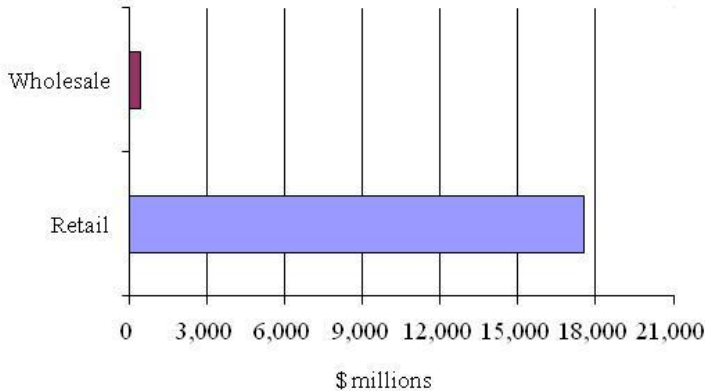
Source: CRTC data collection

Figure 5.5.5 Capex and ACEPU



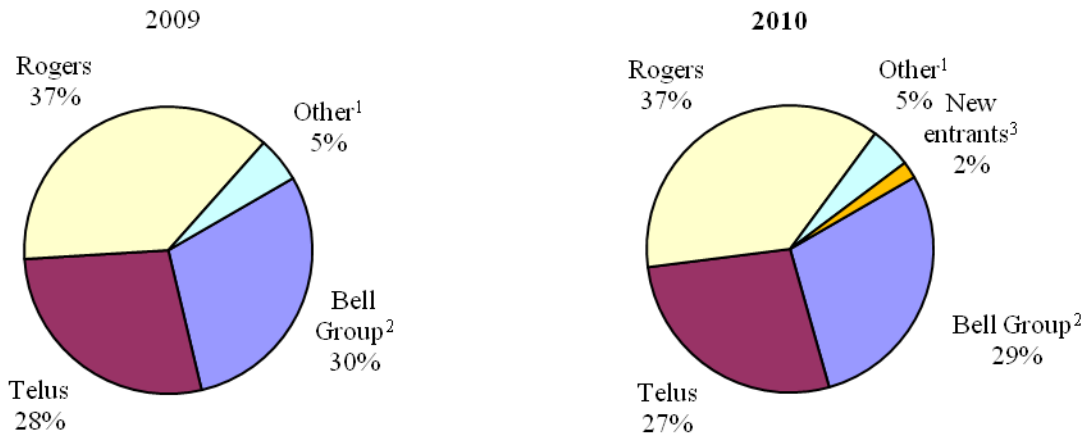
*2008 Capex includes an additional \$4.6 billion due to the AWS auction.
 Source: CRTC data collection

Figure 5.5.6 Retail and wholesale revenue split



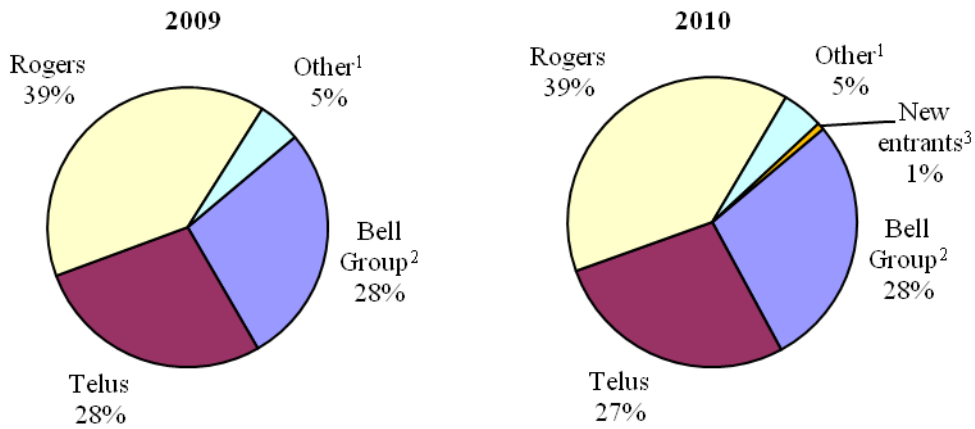
Source: CRTC data collection

Figure 5.5.7 Wireless TSPs’ subscriber market share



1. “Other” includes MTS Allstream, SaskTel, and smaller WSPs.
 2. “Bell Group” includes: Bell Canada, Northwestel Mobility, Bell Mobility, Télébec, NorthernTel, Skyterra, Virgin, and Latitude Wireless.
 3. “New entrants” refers to the new wireless entities that acquired spectrum in Industry Canada’s 2008 AWS spectrum auction
- Source: CRTC data collection

Figure 5.5.8 Wireless TSPs’ revenue market share



1. “Other” includes MTS Allstream, SaskTel, and smaller WSPs.
 2. “Bell Group” includes: Bell Canada, Northwestel Mobility, Bell Mobility, Télébec, NorthernTel, Skyterra, Virgin, and Latitude Wireless.
 3. “New entrants” refers to the new wireless entities that acquired spectrum in Industry Canada’s 2008 AWS spectrum auction
- Source: CRTC data collection

Table 5.5.4 Wireless subscriber market share, by province (2010)

Province	Bell Group ²	Telus	Rogers	New entrants ³	Other ¹
British Columbia	17%	40%	42%	1%	0%
Alberta	22%	50%	27%	1%	0%
Saskatchewan	4%	5%	13%	0%	78%
Manitoba	3%	10%	29%	0%	57%
Ontario	30%	20%	47%	2%	1%
Quebec	37%	27%	33%	3%	0%
New Brunswick	61%	18%	20%	0%	0%
Prince Edward Island	62%	21%	17%	0%	0%
Nova Scotia	56%	24%	20%	0%	0%
Newfoundland and Labrador	76%	21%	3%	0%	0%
The North ⁴	90%	0%	0%	0%	10%

1. “Other” includes MTS Allstream, Sasktel, and smaller WSPs.

2. “Bell Group” includes: Bell Canada, Northwestel Mobility, Bell Mobility, Télébec, NorthernTel, Skyterra, Virgin, and Latitude Wireless.

3. “New entrants” refers to the new wireless entities that acquired spectrum in Industry Canada’s 2008 AWS spectrum auction

4. The North includes Yukon, the Northwest Territories, and Nunavut.

Source: CRTC data collection

Table 5.5.5 ARPU, by province (excluding paging)

Province	2006	2007	2008	2009	2010
British Columbia	\$59.00	\$59.10	\$63.53	\$60.88	\$60.45
Alberta	\$70.07	\$73.81	\$75.26	\$70.28	\$69.58
Saskatchewan	\$52.74	\$55.11	\$57.66	\$58.11	\$62.93
Manitoba	\$54.01	\$54.46	\$57.05	\$52.88	\$54.51
Ontario	\$54.40	\$59.63	\$60.61	\$62.75	\$58.72
Quebec	\$47.52	\$50.21	\$50.45	\$52.15	\$49.98
New Brunswick	\$48.84	\$52.87	\$50.00	\$51.08	\$52.03
Prince Edward Island	\$61.10	\$63.58	\$64.89	\$56.18	\$48.43
Nova Scotia	\$50.42	\$54.59	\$52.57	\$52.70	\$54.72
Newfoundland and Labrador	\$45.37	\$50.29	\$47.43	\$48.22	\$50.45

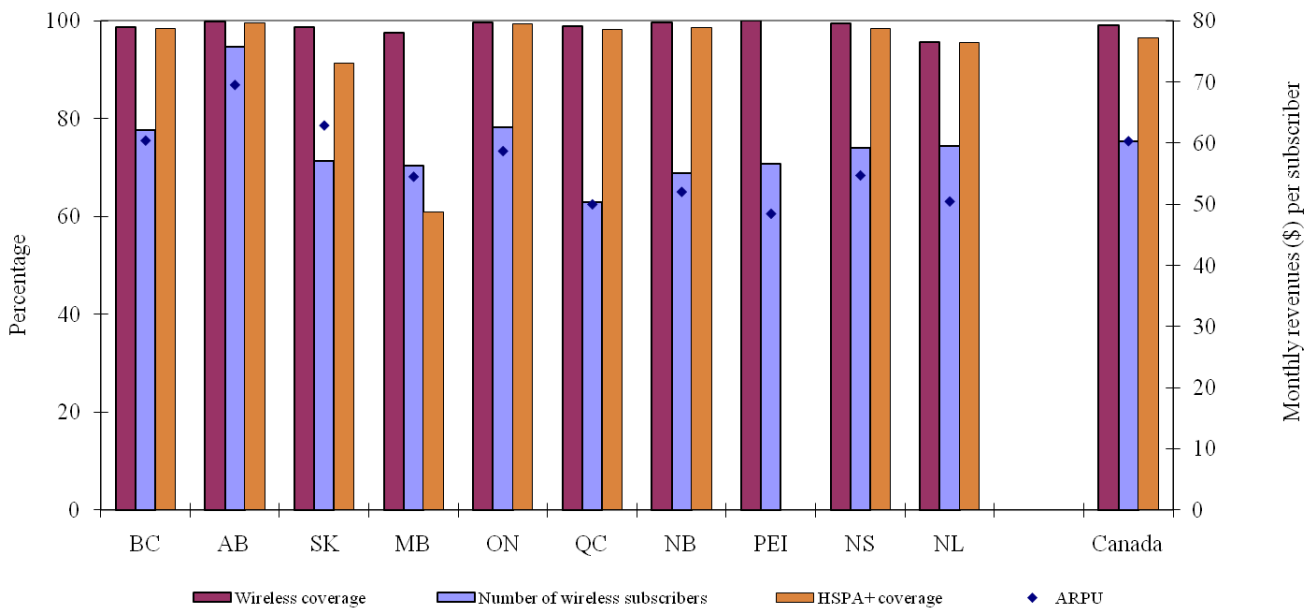
Source: CRTC data collection

Table 5.5.6 Average monthly churn rates (percent)

	2006	2007	2008	2009	2010
Bell Mobility	1.6	1.7	1.6	1.6	1.9
Rogers	1.8	1.6	1.5	1.4	1.5
TCC	1.3	1.5	1.6	1.6	1.6

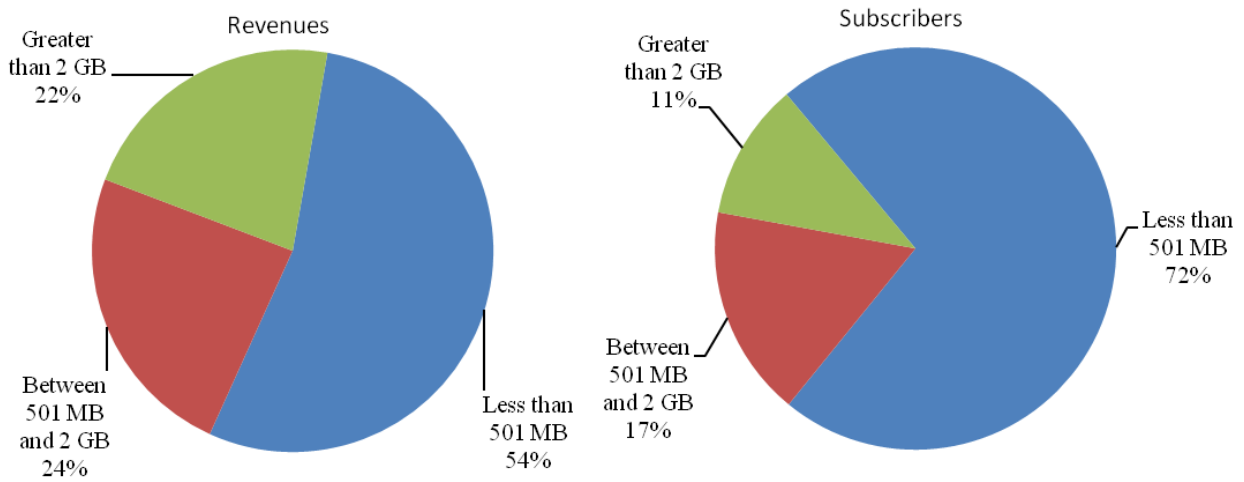
Sources: Companies’ annual reports and CRTC data collection

Figure 5.5.9 Population coverage and penetration



Source: CRTC data collection

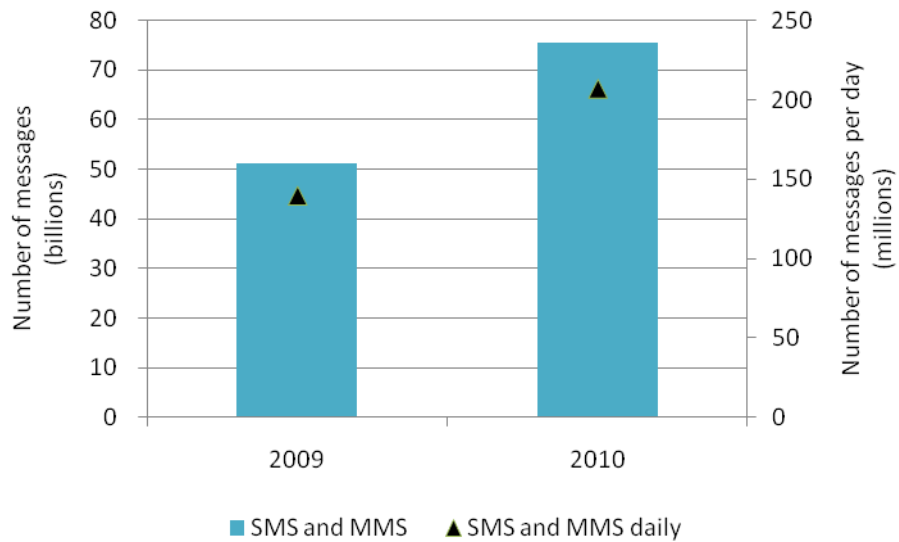
Figure 5.5.10 Mobile data only plan revenues, subscriptions and average monthly revenues per subscriber by data plan capacity



Capacity:	Less than 501 MB	Between 501 MB and 2 GB	Greater than 2 GB
Average revenues per subscriber per month (\$)	23	44	64

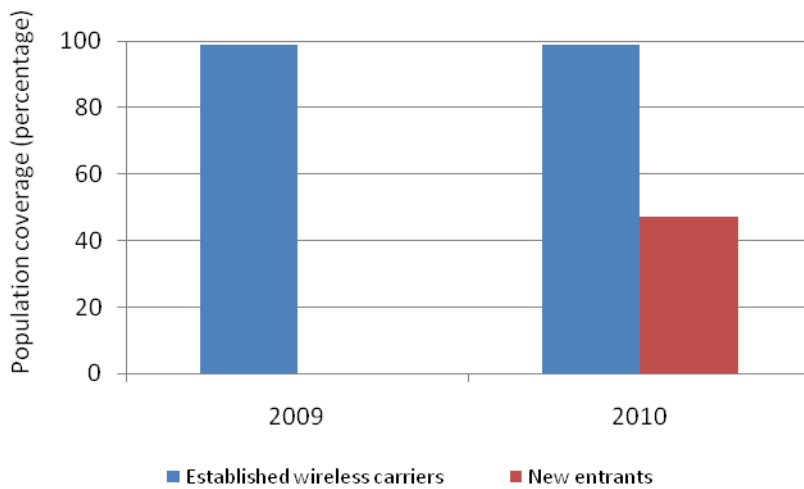
• Data only plans include built-in and portable access devices such as hubs, sticks, dongles, laptops, etc.
Source: CRTC data collection

Figure 5.5.11 Total number of MMS and SMS messages



• The number of mms and sms messages includes both incoming and outgoing messages.
 Source: CRTC data collection

Figure 5.5.12 Established carriers’ coverage v. new entrants’ coverage



Source: CRTC data collection

Table 5.5.7 Mobile broadband

	Number of subscribers (millions)	Percentage of all subscribers
Standard mobile broadband	9.1	35%
Dedicated mobile	0.9	4%
Total mobile broadband	10.0	39%

Source: CRTC data collection

Table 5.5.8 Canadian wireless monthly service rates - incumbents v. new entrants (2010)

Baskets	Vancouver	Toronto	Montreal	Average
Level 1 Basket (low-volume use, 150 minutes per month)				
Incumbents	32.29	34.26	34.53	33.69
New entrants	23.40	25.27	30.58	26.41
<i>Percentage Differential</i>	-28%	-26%	-11%	-22%
Level 2 Basket (average use, 450 minutes and 200 text per month)				
Incumbents	51.18	49.51	51.09	50.59
New entrants	43.05	45.37	51.45	46.62
<i>Percentage Differential</i>	-16%	-8%	1%	-8%
Level 3 Basket (high-volume use, 1,200 minutes, 200 text and 1GB data per month)				
Incumbents	99.88	99.88	98.48	99.41
New entrants	51.35	51.35	98.90	67.20
<i>Percentage Differential</i>	-49%	-49%	0%	-342%

- Averages calculated on a market share and population weighted basis.

Source: Price comparison study conducted for the CRTC in April 2011 by Wall Communications Inc.; see Appendix 4 for a summary of the assumptions and methodologies used.

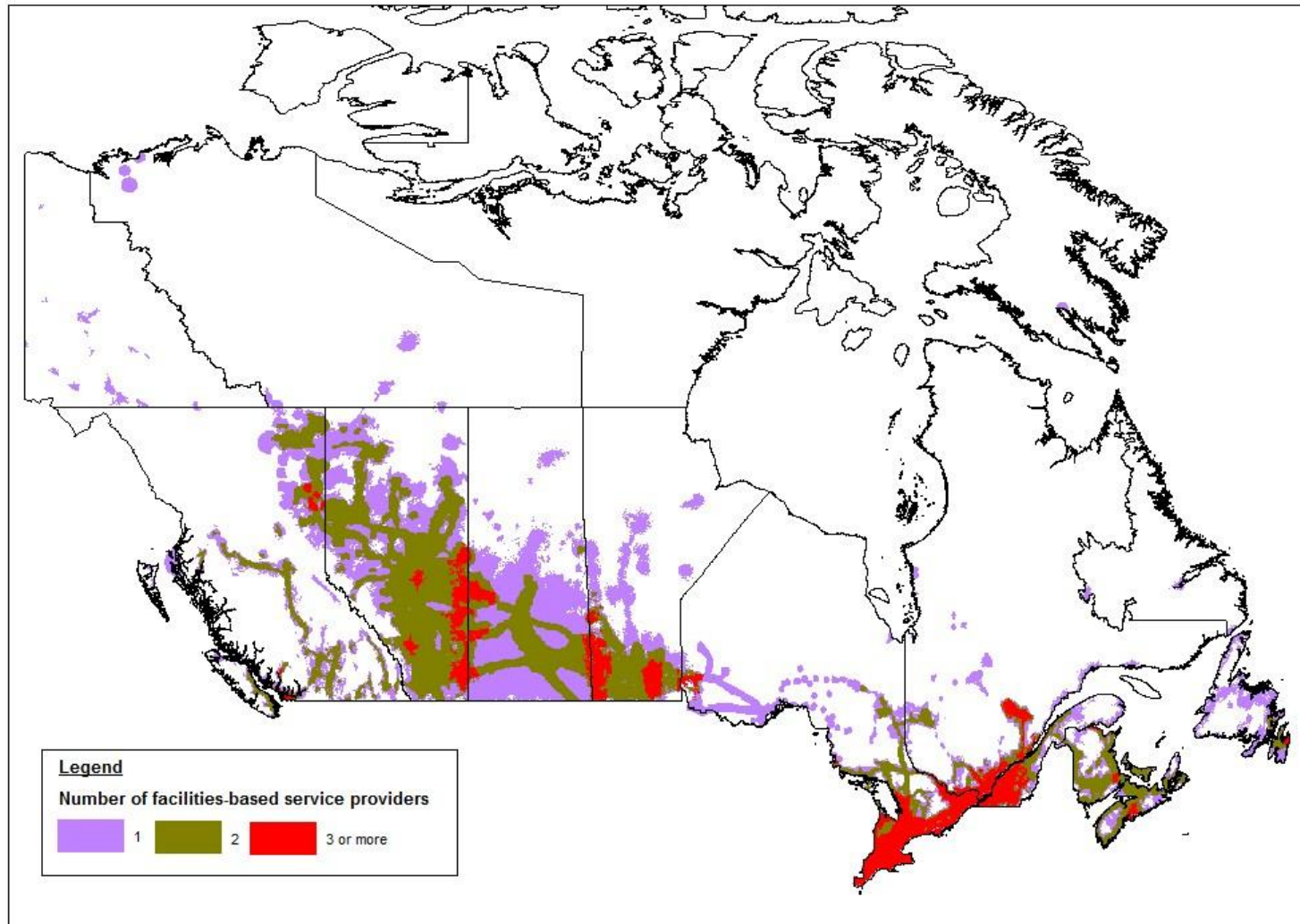
Table 5.5.9 Canadian wireless monthly Internet service rates - incumbents v. new entrants (2010)

Baskets	Vancouver	Toronto	Montreal	Average
Incumbents	52.32	52.32	52.97	52.54
New entrants	40.00	40.00	34.96	38.32
<i>Percentage Differential</i>	-24%	-24%	-34%	-27%

- Averages calculated on a market share and population weighted basis

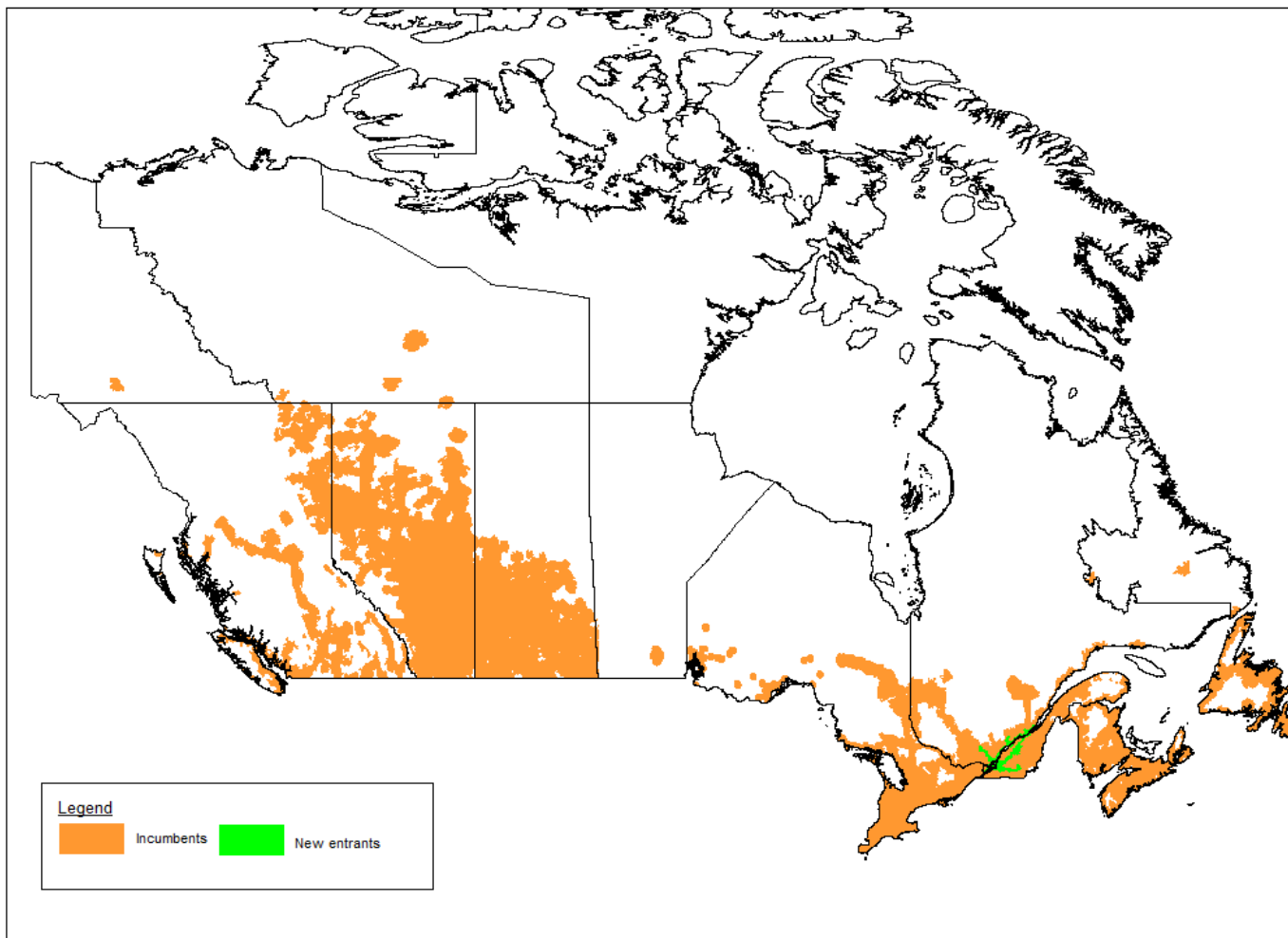
Source: Price comparison study conducted for the CRTC in April 2011 by Wall Communications Inc.; see Appendix 4 for a summary of the assumptions and methodologies used.

Map 5.5.1 Presence of wireless facilities-based service providers



Source: CRTC data collection

Map 5.5.2 Presence of HSPA+ wireless facilities-based service providers



Source: CRTC data collection

6.0 International perspective

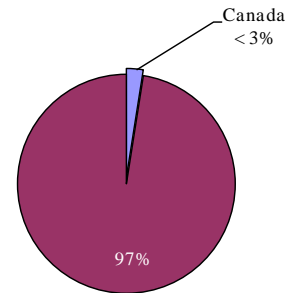
6.1 How Canada compares internationally

This section provides a statistical comparative perspective of Canada in the context of the international communications landscape, including a global view of pricing, revenues, and other metrics within the communications industry sectors of wireline, wireless, broadband, radio, and television services.

In 2010, revenues from Canadian telecommunications services represented less than 3% of global telecommunications revenues.

Canada’s portion of North American telecommunications revenues was approximately 10%.

Global telecommunications revenues
\$1,598 billion
2010



Service pricing – Individual services and bundled rates

Service providers in the telecommunications and broadcasting industries continued to offer traditional core business services and to package communications services into various bundles. These bundles combine some or all of the following: fixed-line voice telephony services, mobile wireless services, broadband Internet access via both fixed and mobile technologies, and television and video services. Price comparisons between Canada and five selected foreign jurisdictions are contained in Table 6.1.1.

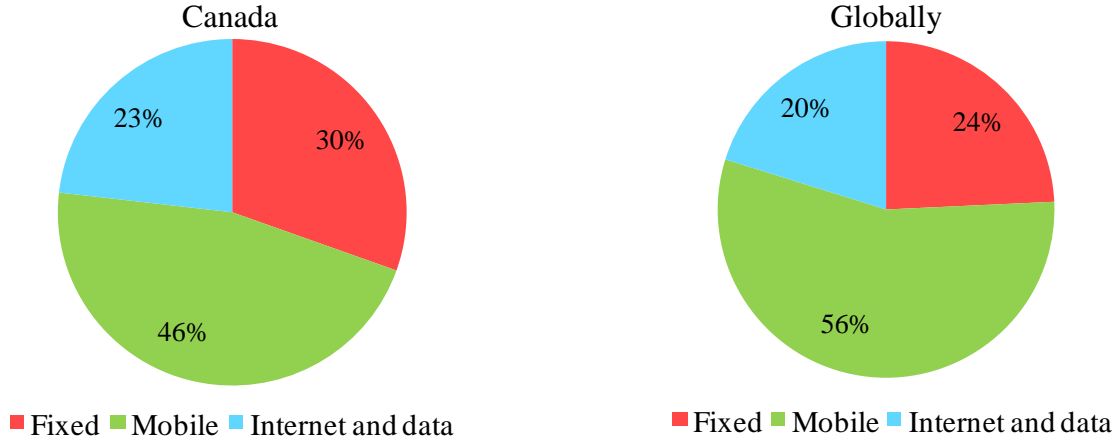
Statistical information – International comparisons
Pricing – Communications services
Table 6.1.1 International pricing (average price (\$) ¹ per month)

	Canada	United States	United Kingdom	France	Australia	Japan
Wireline service						
Level 1 (low-volume use)	32	45	34	38	46	30
Level 2 (average use)	50	74	46	55	73	59
Level 3 (high-volume use)	60	80	61	68	82	92
Wireless service						
Level 1 (basic user)	34	33	19	26	21	25
Level 2 (average user)	51	69	33	75	37	49
Level 3 (premium user)	100	139	64	101	74	120
Broadband (fixed technology)						
Level 1 (≈1.5 Mbps, 2 GB/month ²)	35	51	n/a	28	30	43
Level 2 (1.5-9 Mbps, 10 GB/month ²)	50	65	41	47	57	54
Level 3 (10-20 Mbps, 30 GB/month ²)	63	80	40	66	60	55
Level 4 (20+ Mbps, 50 GB/month ²); average advertised download speed	78 ≈30 Mbps	95 ≈26 Mbps	50 ≈35 Mbps	50 ≈50 Mbps	67 100 Mbps	60 ≈40 Mbps
Mobile Internet (3G technology)						
≥1.5 Mbps, ≥2 GB/month data usage ³	52	72	24	43	27	69
Bundled services						
Wireline-Wireless-Broadband	134	183	95	127	145	150
Wireline-Broadband-Digital TV	123	174	99	70	139	138
Wireline-Wireless-Broadband-DTV	168	238	132	148	179	193

1. Canadian dollars shown have been converted from local currencies and adjusted for purchasing power parity differences across the countries.
 2. Some of the broadband plans offered in Canada, the UK, and Australia had data usage caps; plans sampled from the US, France, and Japan had no monthly data usage restrictions during the data collection period of this study.
 3. Most of the mobile Internet access plans from all six countries surveyed had applicable monthly data usage caps.
- Source: Price comparison study conducted during the first quarter of 2011 by Wall Communications Inc.; see Appendix 4 for a summary of the assumptions and methodology used.

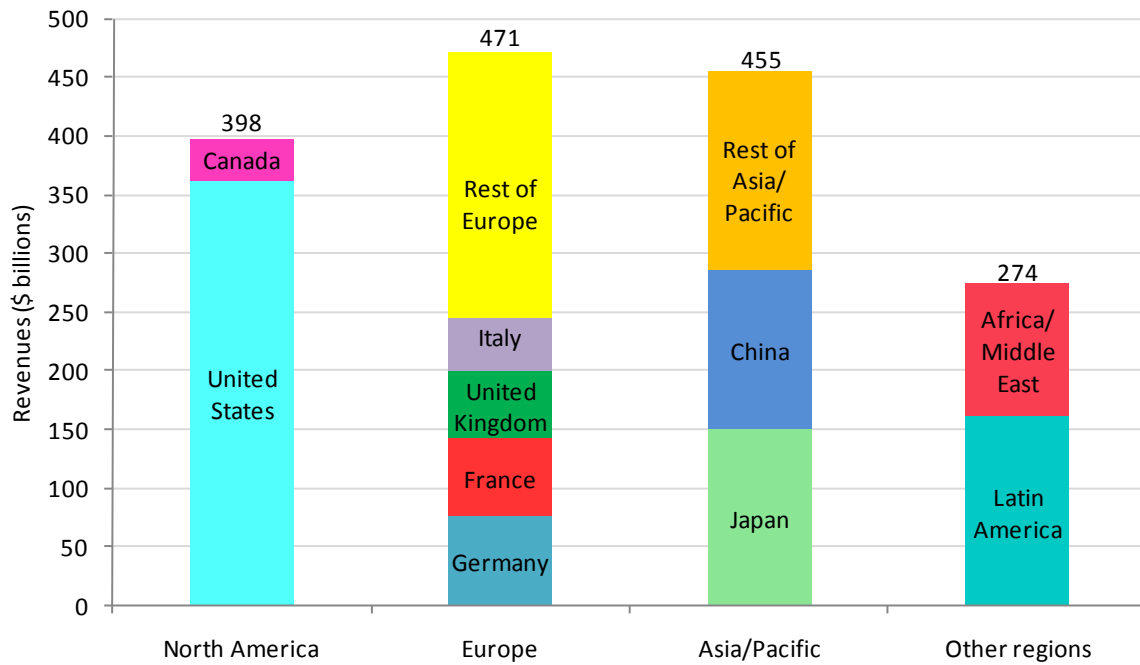
Revenues – Communications services

Figure 6.1.1 Telecommunications revenues, by market sector, 2010



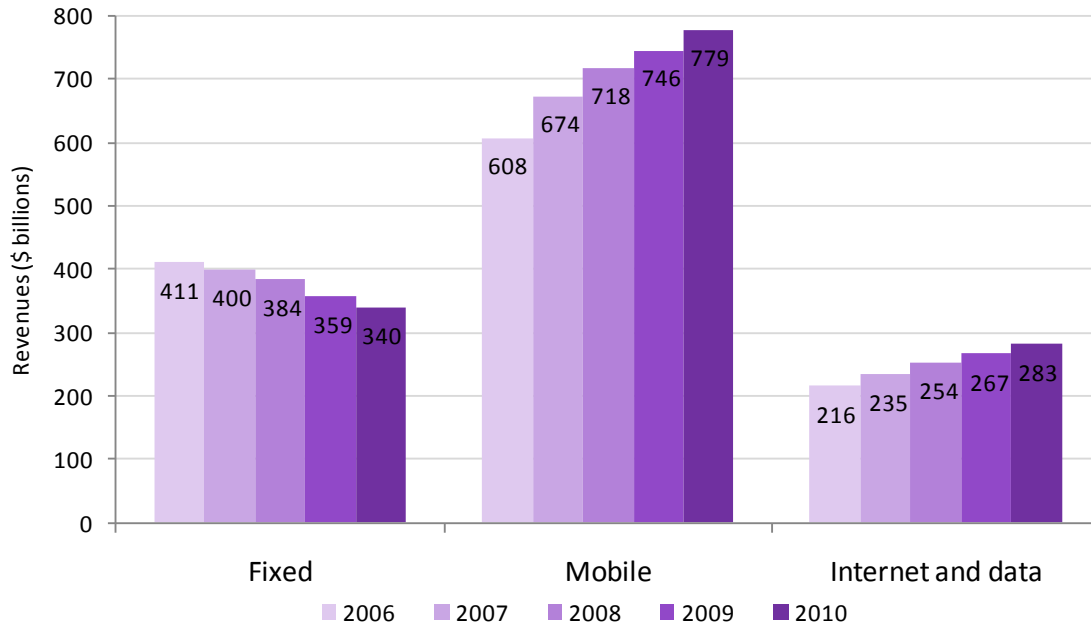
Source: IDATE

Figure 6.1.2 Global telecommunications retail revenues, by region, 2010



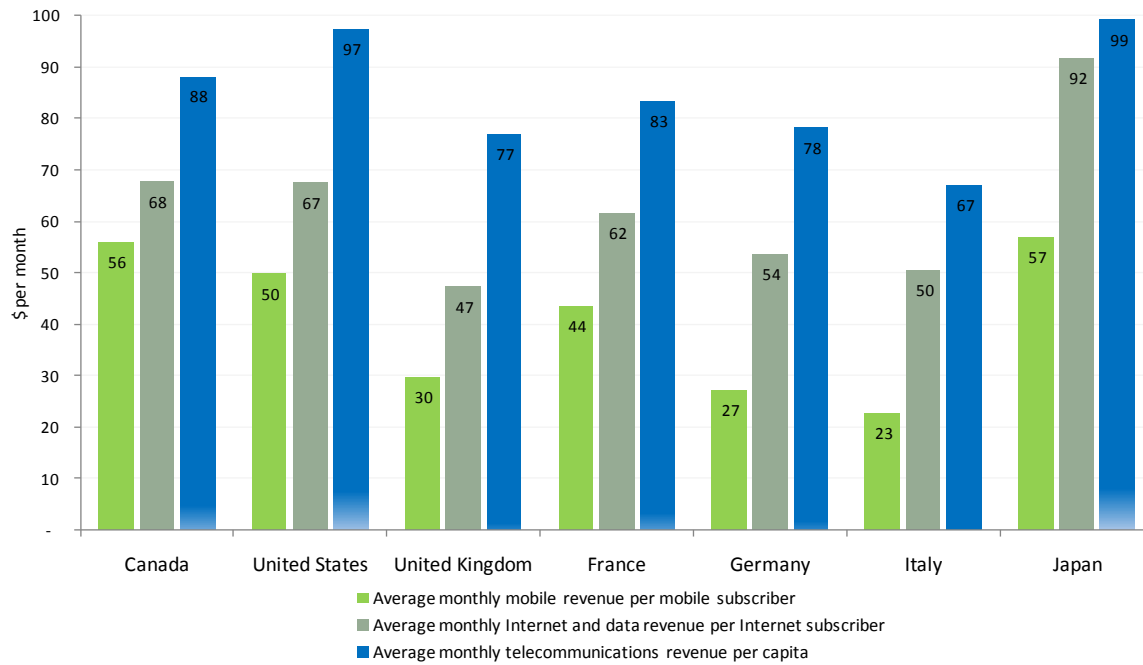
• Canadian dollars shown have been converted based IMF 2009 year average exchange rates.
Source: IDATE

Figure 6.1.3 Global telecommunications retail revenues, by market sector, 2006–2010



Source: IDATE

Figure 6.1.4 Average monthly telecommunications retail revenues, 2010

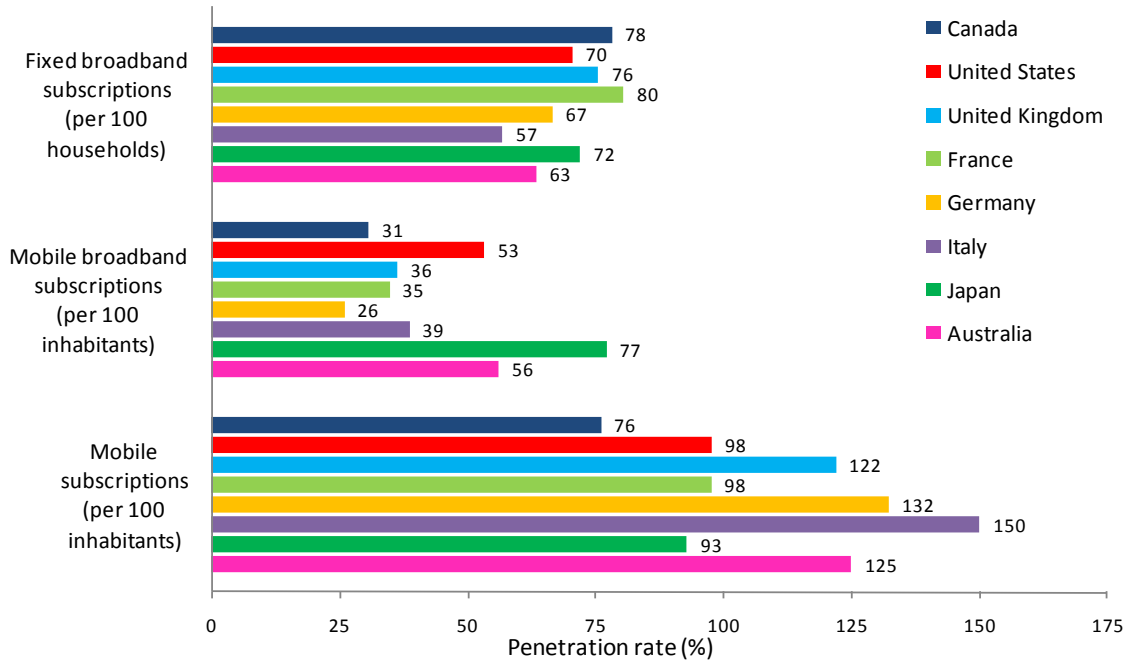


• Canadian dollars shown have been converted based on IMF 2009 year average exchange rates.

Source: IDATE

Telecommunications - Service penetration

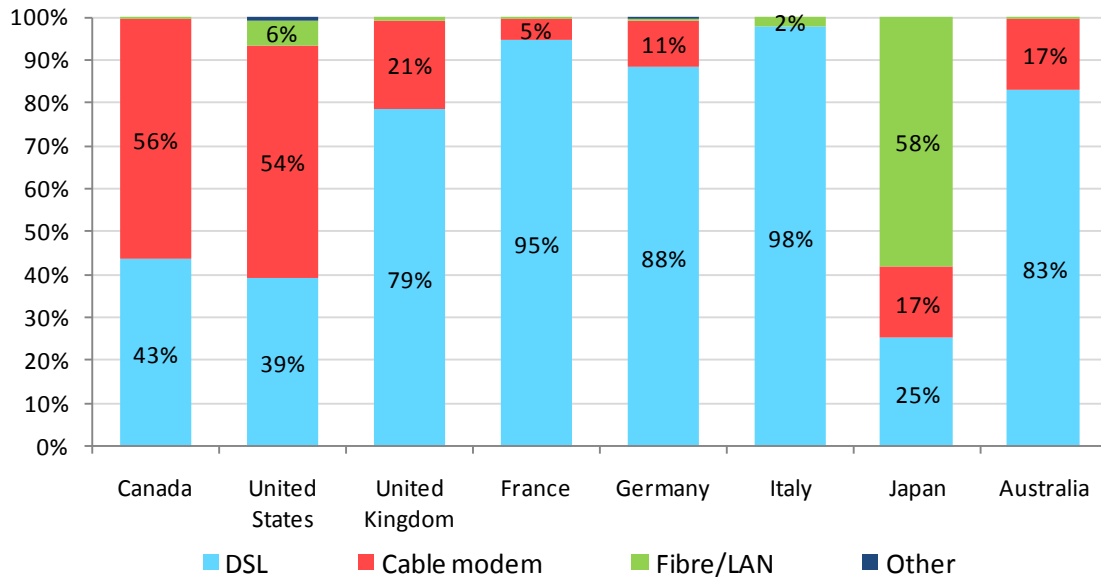
Figure 6.1.5 International penetration, 2010



• Broadband connections using fixed wireless technology are now reflected in the mobile broadband penetration rates shown, rather than in the fixed broadband penetration rates.
 Sources: CRTC data collection, OECD, Bank of America Merrill Lynch

Broadband service

Figure 6.1.6 Share of fixed broadband subscriptions, by technology, 2010



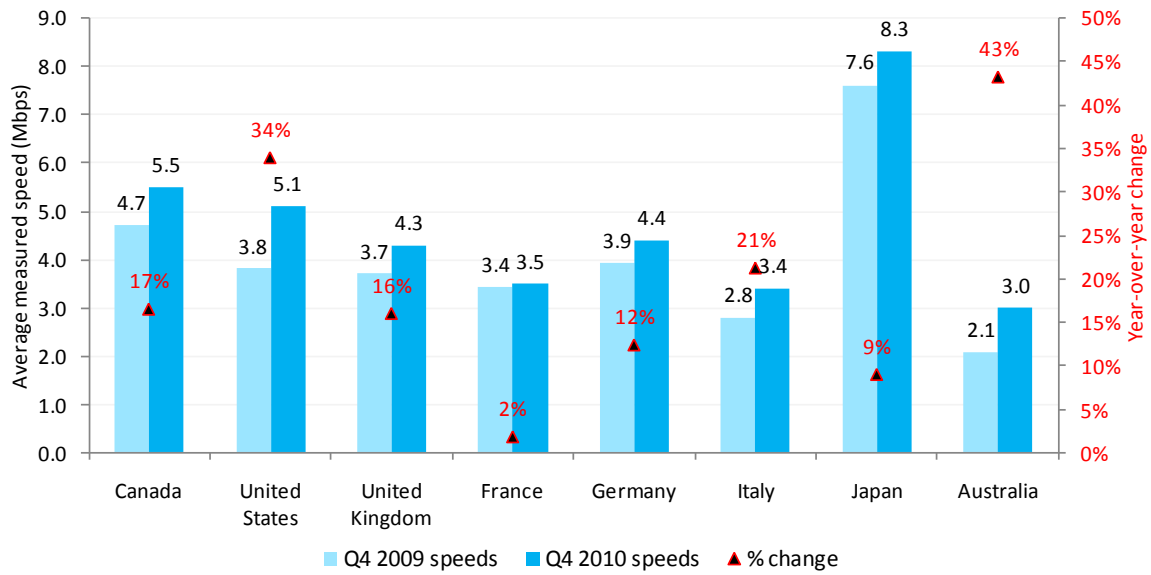
Source: OECD

Table 6.1.2 Average advertised Internet speeds (Mbps) across OECD countries, by technology

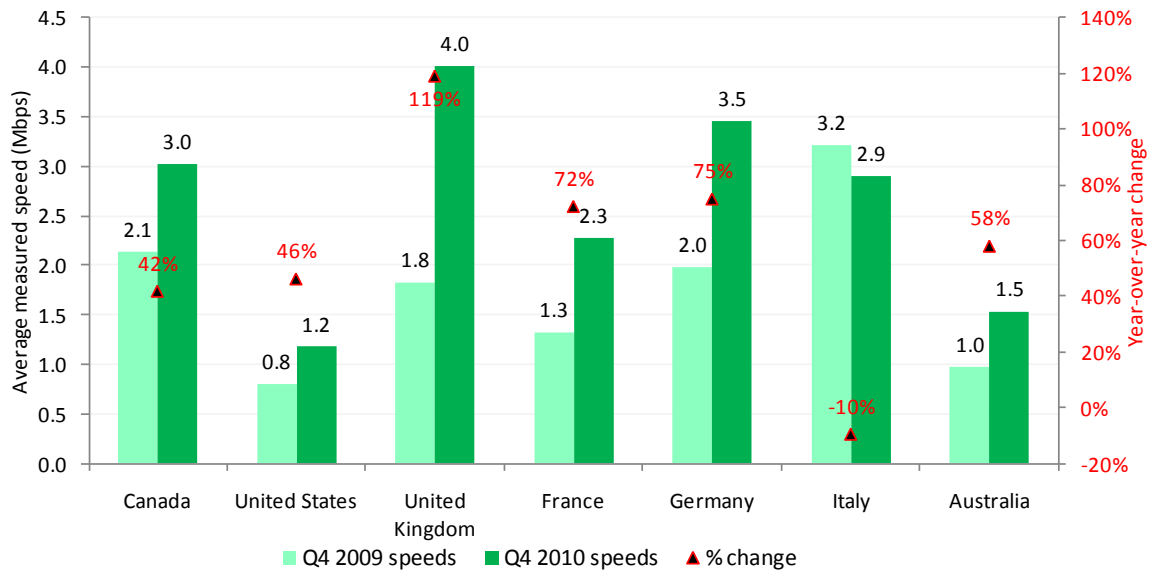
	October 2009	September 2010	Growth 2009–2010
DSL			
Download	14.4	14.2	- 1%
Upload	3.9	2.5	-36%
Cable modem			
Download	25.5	29.7	16%
Upload	2.3	2.7	17%
FTTH			
Download	76.8	93.1	21%
Upload	51.7	60.0	16%

Source: OECD

Figure 6.1.7 Average measured fixed broadband speeds, 2009 and 2010



Source: Akamai

Figure 6.1.8 Average measured mobile broadband speeds, 2009 and 2010


Source: Akamai

Table 6.1.3 Global shipments of mobile phones, 2010

	2010	Growth 2009–2010
Mobile handset shipments (including smartphones)	1,388 million	18.5%
Smartphone shipments	303 million	74.4%
Smartphones as proportion of total annual mobile phone sales	22%	

Source: IDC, February 2011

Wireless mobile service

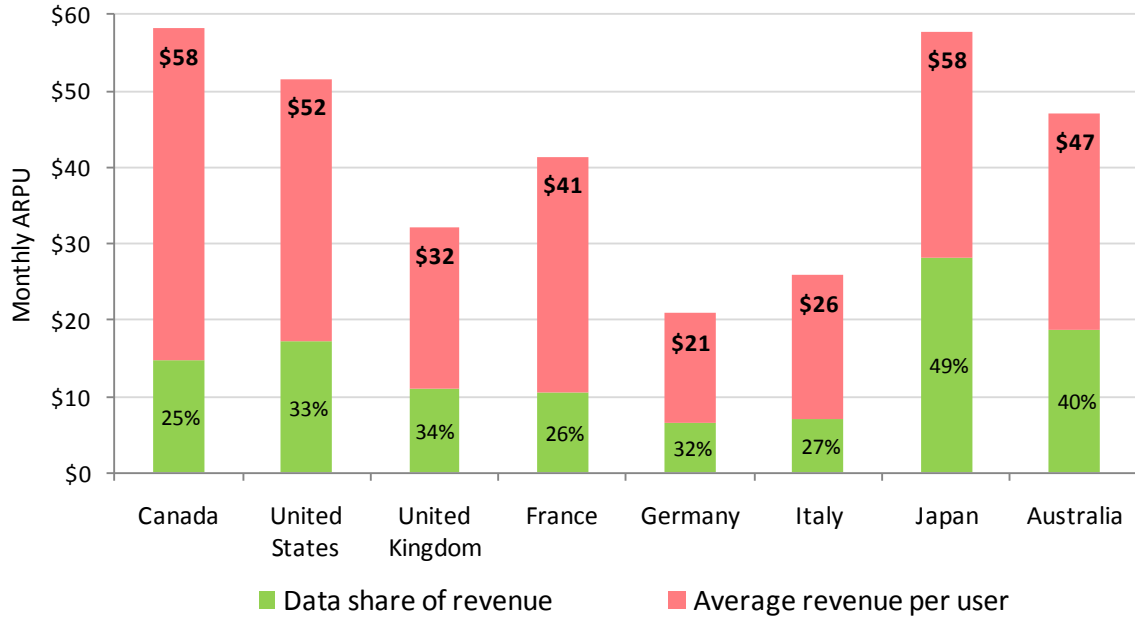
Table 6.1.4 Wireless industry metrics, 2010

	Number of mobile subscribers (millions)	Number of major providers	Market share (in subscribers) of top two providers	Revenues ¹ from wireless services (voice & data) (\$ billions)	ARPU growth (2009–2010)
Canada	25.83	3	64%	16.49	-0.2%
United States	302.85	4	63%	169.43	-1.4%
United Kingdom	76.03	5	54%	28.83	-4.3%
France	63.17	3	76%	31.75	-9.1%
Germany	108.85	4	66%	27.30	1.5%
Italy	90.38	4	68%	27.86	-2.8%
Japan	117.79	3	76%	77.36	-5.2%
Australia	28.02	3	73%	15.12	-1.3%

1. Canadian dollars shown have been converted from local currencies based on Bank of Canada 2010 year average exchange rates.

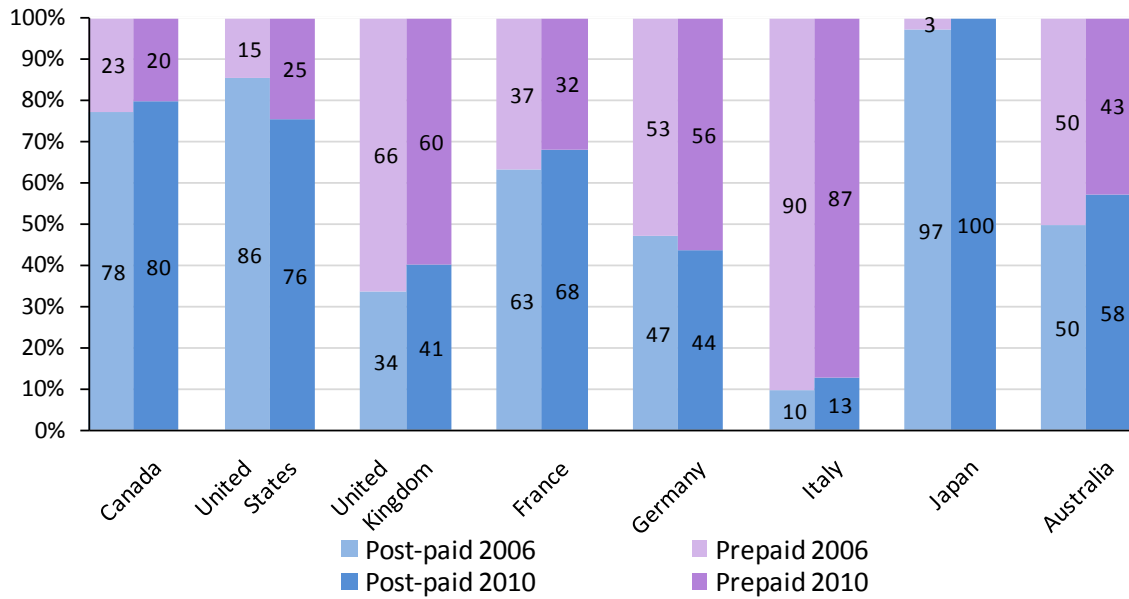
Sources: CRTC data collection, Bank of America Merrill Lynch

Figure 6.1.9 Wireless ARPU – monthly revenues, including data share, 2010



• Canadian dollars shown have been converted from local currencies based on Bank of Canada 2010 year average exchange rates.
 Source: Bank of America Merrill Lynch

Figure 6.1.10 Proportion of post-paid versus prepaid mobile subscriptions, 2006 and 2010



Source: Bank of America Merrill Lynch

Broadcasting – Radio industry
Table 6.1.5 Radio industry metrics, 2009

	Total radio industry revenues ¹ (\$ billions ²)	Year-over-year change in radio revenues (%)	Radio revenue per capita (\$ annually)	Listening minutes per day per person
Canada	1.6	-6.6	15	157
United States	19.1	-15.7	39	159
United Kingdom	2.1	-7.1	25	189
France	2.3	-4.3	24	179
Germany	5.3	1.9	20	186
Italy	2.0	-5.1	20	180
Japan	4.6	-3.9	29	108
Australia	0.9	-5.7	25	178

1. Revenues are comprised of advertising, public funding, and subscription revenues.

2. Canadian dollars shown have been converted based on IMF 2009 year average currency exchange rates.

Source: Ofcom International Communications Market Report 2010

Broadcasting – Television industry
Table 6.1.6 Television industry metrics, 2009

	Total television industry revenues ¹ (\$ billions ²)	Year-over-year change in TV revenues (%)	Subscription/pay TV ARPU ³ (\$ annually)	Viewing minutes per day per person (pay or free-to-air)
Canada	6.2	-0.2	189	227
United States	145.1	-1.0	855	280
United Kingdom	18.7	0.2	612	225
France	17.8	2.4	623	205
Germany	19.9	-0.4	269	212
Italy	14.4	-2.9	767	238
Japan	44.3	-4.6	559	234
Australia	6.4	0.1	992	185

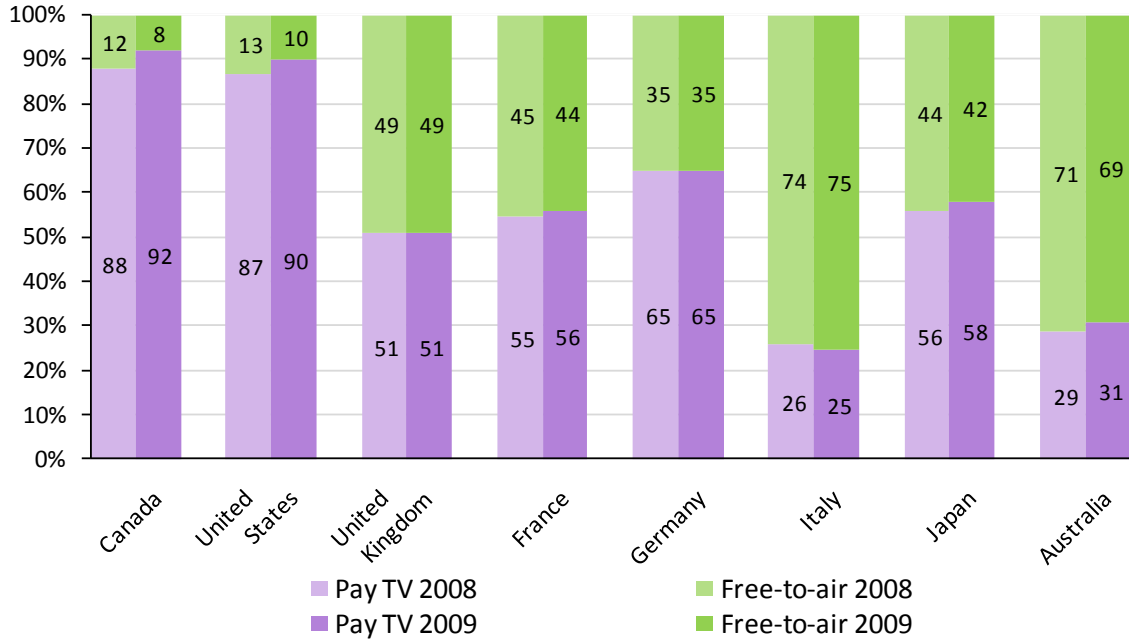
1. Revenues are comprised of advertising, public funding, and subscription revenues.

2. Canadian dollars shown have been converted based on IMF 2009 year average currency exchange rates.

3. ARPU represents average revenue generated per pay television subscriber (terrestrial, cable, satellite, or IPTV).

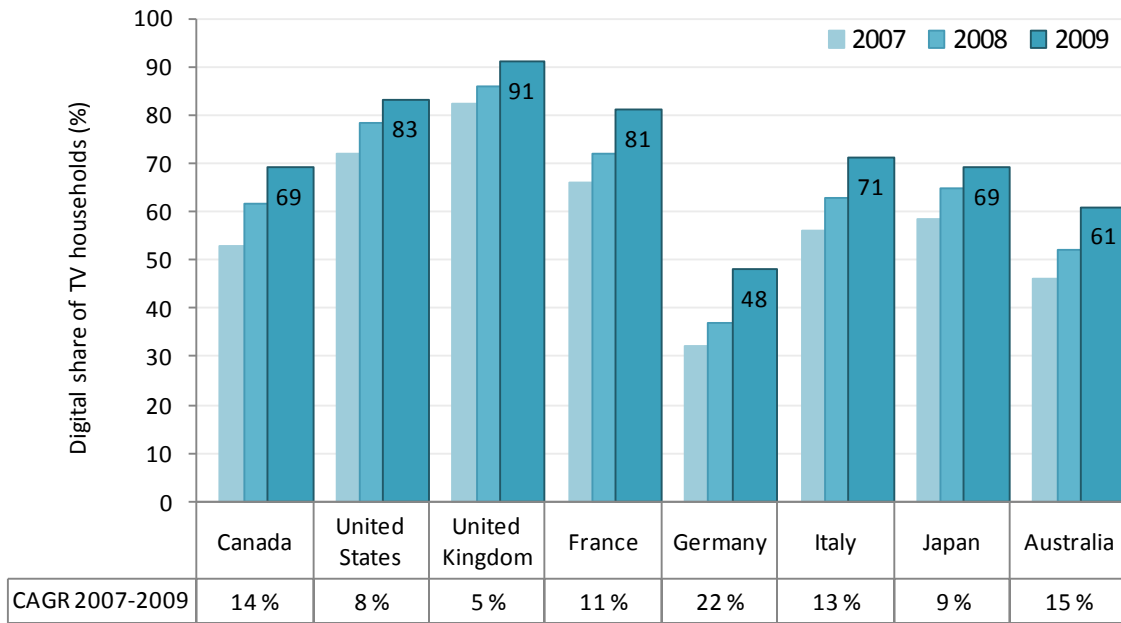
Source: Ofcom International Communications Market Report 2010

Figure 6.1.11 Proportion of pay TV versus free-to-air households, 2008 and 2009



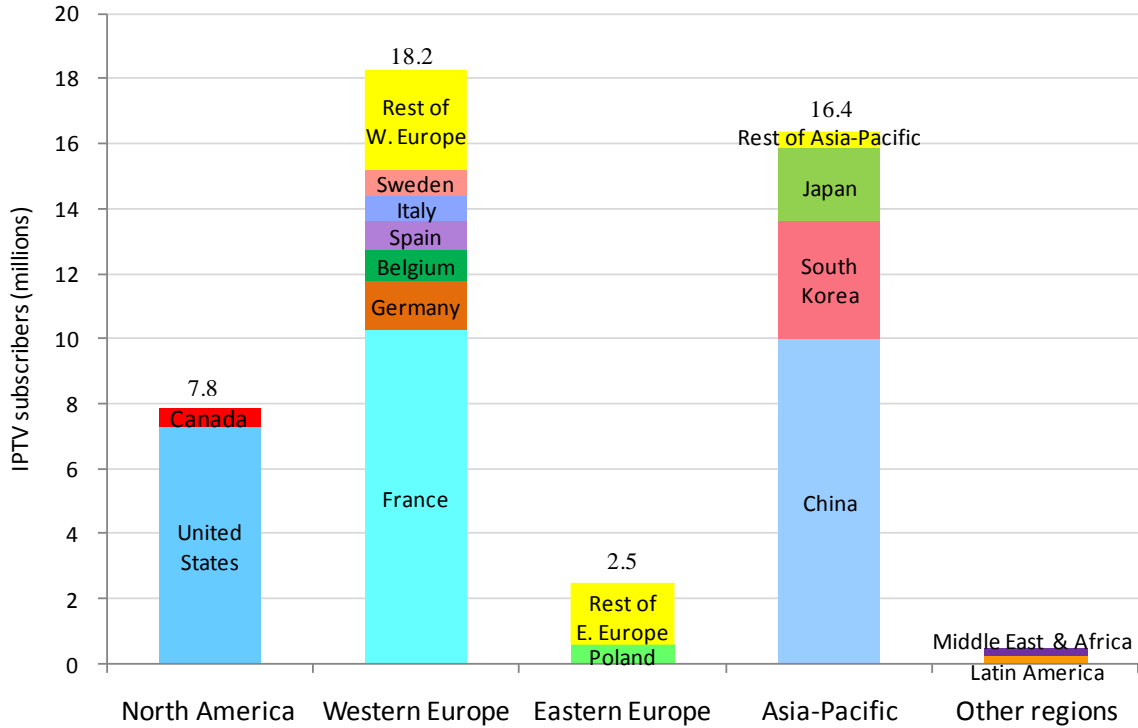
Source: Ofcom International Communications Market Report 2010

Figure 6.1.12 Digital TV penetration and growth, 2007–2009



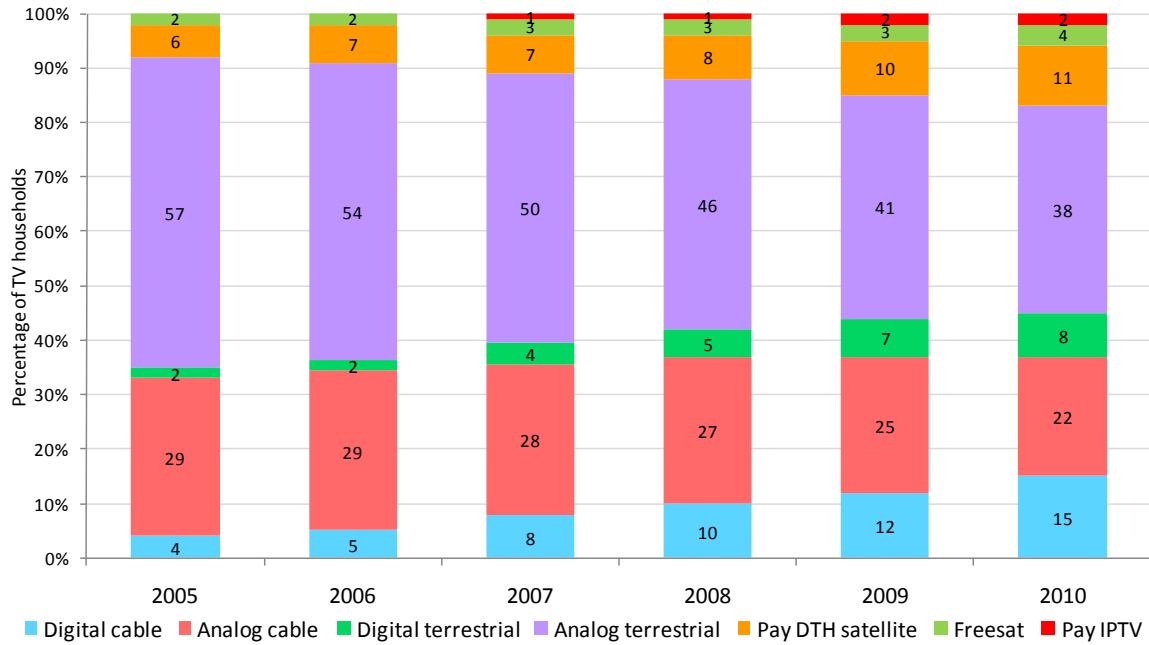
Source: Ofcom International Communications Market Report 2010

Figure 6.1.13 Global IPTV subscribers, by region, 2010



Source: Point Topic

Figure 6.1.14 Global television households, by platform, 2005–2010



Source: TV International Sourcebook 2011

Data collection and analysis

Data collection

Statistics Canada and the CRTC collect data jointly under the authority of the *Statistics Act*, the *Broadcasting Act*, and the *Telecommunications Act*. Statistics Canada uses the data to develop national accounts, and the CRTC uses it to monitor the industries' performance and adherence to regulations.

Broadcasting

Data collected are used to measure the financial performance of broadcasters and their contribution to the Canadian economy. The data collection process targets all broadcasting service providers licensed by the CRTC to operate private, public, and non-commercial radio, television, and broadcasting distribution services, as well as pay, pay-per-view, video-on-demand, and specialty services. Broadcasting licensees file annual returns outlining financial and statistical information for each broadcast year. The key results of the data collection process are used to produce annual financial and statistical summaries of revenues and expenditures, such as expenditures on Canadian and international programming. These summaries are published on the CRTC's website at <http://www.crtc.gc.ca/eng/stats.htm>.

The broadcasting regulations require broadcasting service providers to complete an annual survey. Except for a small number of small radio service providers, broadcasting service providers access and submit the survey forms electronically using the CRTC's secure web-based DCS. In mid-October each year, the survey is mailed to the small radio service providers that do not have access to the DCS. The survey covers the 12-month period ending 31 August that year. All broadcasting service providers have until 30 November to complete and submit their respective annual survey forms.

As part of the annual return process, commercial radio broadcasters must report on their contributions to CCD. BDUs must submit information regarding their Contributions to the Creation and Production of Canadian Programming. This information enables the CRTC to ensure that radio licensees are complying with their conditions of licence or regulatory requirements relating to CCD contributions and that broadcast distribution licensees are fulfilling their obligations regarding the creation and production of Canadian programming, including contributing to the CMF, LPIF, independent funds, and local expression.

Telecommunications

As part of its monitoring activities, the CRTC uses the data collection process to maintain and update its data on (i) TSP registration lists, (ii) the contribution regime, (iii) telecommunications fees, and (iv) the telecommunications service industry.⁹

TSPs are classified into one of two groups: Group 1 TSPs and Group 2 TSPs. Group 1 TSPs generally (i) have significant telecommunications revenues, (ii) file tariffs, or (iii) have international licences. Group 2 TSPs generally have lower revenues than Group 1 TSPs.

Each TSP is required to complete and submit annually to the CRTC a registration form, which the CRTC uses to update certain basic information about that TSP and to determine which additional forms, if any, are to be issued to the TSP. Group 1 TSPs must access and submit the registration form electronically using the CRTC's secure web-based DCS. The CRTC contacts these TSPs by email at the start of the data collection process each year and provides them with (i) the due dates for submitting the registration form and any additional data forms, and (ii) the information needed to access the DCS. Group 2 TSPs, on the other hand, are mailed a registration form for completion. Submission of this form generally marks the end of the data collection process for the Group 2 TSPs.

Group 1 TSPs are required to submit a range of company-specific information, including financial data (e.g. an income statement, a balance sheet, and capital expenditure information), along with detailed telecommunications information focused on products and geographic markets. Geographic markets are defined on a national, provincial/territorial, regional, local exchange, or city basis. The data submitted are as of 31 December each year.

Data analysis

Broadcasting

The CRTC performs a compliance analysis using the financial data from the annual returns submitted by all broadcasting service providers. The objectives of this analysis are as follows:

- to ensure that the summary of financial data for operations connected to the licensee, included in the annual return, corresponds to the data presented in the financial statements required of broadcasting licensees in accordance with Circular No. 404;

⁹ *Telecommunications industry data collection: updating of CRTC registration lists, telecommunications fees, Canadian contribution mechanism fund administration, international licences and monitoring of the Canadian telecommunications industry*, Telecom Circular CRTC 2003-1, 11 December 2003

- to reconcile broadcasting licensees' actual expenditures on Canadian programming with the expenditures required by the licensees' conditions of licence;
- to reconcile broadcasting licensees' actual contributions to CCD with the contributions required by the licensees' conditions of licence; and
- to then proceed with a percentage or ratio analysis of the trends in the major categories of revenue and expenditures listed in the annual forms over a five-year period, particularly with reference to the previous year.

The CRTC then publishes financial and statistical summaries for the four major broadcasting categories (i.e. commercial radio; conventional television; broadcasting distribution; and pay, pay-per-view, video-on-demand, and specialty services). The data from the annual returns are also used to prepare this report.

Revisions may be made to the financial and statistical summaries, and to this report, after they are published. These revisions are generally the result of late receipt of data, modifications made by broadcasting licensees to previously filed data, or errors detected following data publication. The revisions do not generally have a major impact on the results of the data collection process.

Telecommunications

The CRTC analyzes TSPs' returns to ensure that the coverage of TSPs is as anticipated and that the TSPs have provided a complete response. The CRTC then follows up with TSPs as required to resolve or obtain explanations of any anomalies. The CRTC subjects the data to computerized edits designed to ensure accuracy and internal consistency. For large enterprises, the CRTC compares reported data to audited financial information and investigates any major discrepancies. The CRTC then makes a year-over-year comparison to identify any radical or unexplained changes and follows up with TSPs if necessary. Finally, the CRTC determines the data's validity by performing a time series analysis or by comparing the data or their derivatives (such as average revenues per line or minute) with other established benchmarks.

Certain figures published in the monitoring report from previous years may be restated for consistency. Other figures may change as a result of some companies resubmitting previous years' data. In addition, certain data may be reclassified to better reflect market segments or industry developments. These changes are identified by a number sign (#).

Most of the tables and figures included in this report are derived from the data submitted via the DCS, while others are derived using data from Statistics Canada and Industry Canada. Inconsistencies in data may arise between data sources given that the companies surveyed, the definitions used, and the level of detail requested may differ for each source. The data source is therefore identified beneath each table and figure in the report.

Classification of Canadian TSPs

For regulatory purposes, TSPs operating in Canada are classified into two broad categories, incumbent TSPs and alternative TSPs, as described below. The category into which a given TSP falls may change from one year to the next as a result of consolidation in the industry. The classification of affiliated entities of TSPs, providing telecommunications services, is based on their affiliate relationship with the TSP. For example, if a wireless TSP is affiliated with a TSP, the wireless TSP takes the same classification as the TSP to which it is affiliated. Affiliates of non-TSPs are classified according to the structure set out below.

- 1) **Incumbent TSPs** are the companies that provided telecommunications services on a monopoly basis prior to the introduction of competition. For the purpose of this report, these companies' operations outside their traditional operating territories are included in the alternative TSPs category. Incumbent TSPs are subdivided into large and small TSPs.
 - a) *Large incumbent TSPs* serve relatively large areas, usually including both rural and urban populations, and provide wireline voice, Internet, data and private line, wireless, and other services. The large incumbent TSPs are Bell Aliant, Bell Canada, MTS Allstream, Northwestel, SaskTel, Télébec, and TCC.
 - b) *Small incumbent TSPs* serve relatively small geographical areas (mostly municipal areas generally located in less densely populated areas) in Ontario, Quebec, and, in one instance, British Columbia. Due to the limited size of their serving areas, these companies do not typically provide facilities-based long distance services. However, they provide a range of wireline voice, Internet, data and private line, and wireless services. Examples of small incumbent TSPs are NorthernTel and TBayTel.
- 2) **Alternative TSPs** are either i) TSPs that are not incumbent TSPs as described in 1) above or ii) incumbent TSPs conducting out-of-territory operations, such as Bell Canada conducting operations in Alberta and British Columbia. Alternative TSPs are subdivided into facilities-based and non-facilities-based TSPs.
 - a) *Facilities-based alternative TSPs* own and operate a telecommunications network. This group is further subdivided into facilities-based incumbent TSPs (out-of-territory) and facilities-based non-incumbent TSPs.

Facilities-based non-incumbent TSPs are further subdivided into cable BDUs, utility telcos, and other carriers.

- *Cable BDUs* are the former cable monopolies that also provide telecommunications services (e.g. wireline voice, Internet, data and private line, and wireless services). These TSPs include such companies as Bragg, Cogeco, Rogers, Shaw, and Videotron.

- *Utility telcos* are TSPs whose market entry into telecommunications services or whose corporate group's market entry was preceded by a group-member company's operations in the electricity, gas, or other utility business.
 - *Other carriers* own physical transmission facilities (e.g. intercity, intra-city, or local transmission facilities). These TSPs include such companies as Xplornet.
- b) *Non-facilities-based alternative TSPs* do not own or operate a telecommunications network. These companies are referred to as resellers, since they generally acquire telecommunications services from other TSPs and either resell those services or create their own network from which to provide services to their customers. Examples of non-facilities-based TSPs are Distributel, Primus, YAK, and independent ISPs.

**Status of local forbearance - Residential and business exchanges
(as of 30 June 2010)**

Major centre	Number of local exchanges	Number of forborne exchanges		Number of forborne exchanges as a percentage of total exchanges in the major centre	
		Residential	Business	Residential	Business
British Columbia					
Vancouver	19	17	13	90%	68%
Victoria	4	3	3	75%	75%
Remaining exchanges	259	45	22	17%	9%
Alberta					
Calgary	8	3	3	38%	38%
Edmonton	27	10	6	37%	22%
Remaining exchanges	303	26	13	9%	4%
Saskatchewan					
Saskatoon	10	1	1	10%	10%
Regina	5	1	0	20%	0%
Remaining exchanges	214	8	3	4%	1%
Manitoba					
Winnipeg	14	1	1	7%	7%
Remaining exchanges	230	5	0	2%	0%
Ontario					
Toronto	50	45	20	90%	40%
Ottawa/Gatineau	28	19	3	68%	11%
Hamilton	12	7	5	58%	42%
London	16	9	1	56%	6%
Kitchener	8	8	2	100%	25%
St. Catharines/Niagara	13	7	2	54%	15%
Windsor	11	2	2	18%	18%
Oshawa	8	7	2	88%	25%
Remaining exchanges	531	79	26	15%	5%
Quebec					
Montréal	40	37	11	93%	28%
Québec	17	8	2	47%	12%
Remaining exchanges	518	99	16	19%	3%
New Brunswick					
Fredericton	2	2	0	100%	0%
Remaining exchanges	86	21	2	24%	2%
Nova Scotia					
Halifax	16	7	6	44%	38%
Remaining exchanges	131	44	8	34%	6%
Prince Edward Island					
Charlottetown	4	1	0	25%	0%
Remaining exchanges	22	10	2	46%	9%
Newfoundland & Labrador					
St. John's	6	1	1	17%	17%
Remaining exchanges	206	0	0	0%	0%

International pricing assumptions

Below is a summary of the assumptions and methodology used in developing aggregate pricing indices for the international price comparisons shown in Table 6.1.1.

Table A.4.1 Service providers surveyed (Part 1 of 2)

City	Service basket	Service providers
Canada		
Halifax NS	Wireline	Bell Aliant, EastLink
	Wireless	Bell, Telus, Rogers
	Broadband Internet	Bell Aliant, EastLink
	Mobile Internet	Bell, Telus, Rogers
	Bundles	Bell Aliant, EastLink
Montréal QC	Wireline	Bell, Videotron, Primus
	Wireless	Bell, Telus, Rogers, Primus, Videotron, Public Mobile
	Broadband Internet	Bell, Videotron, Primus
	Mobile Internet	Bell, Telus, Rogers, Videotron
	Bundles	Bell, Videotron, Primus (excluding digital TV)
Toronto ON	Wireline	Bell, Rogers, Primus
	Wireless	Bell, Telus, Rogers, Primus, WIND, Mobilicity, Public Mobile
	Broadband Internet	Bell, Rogers, Primus
	Mobile Internet	Bell, Telus, Rogers, WIND, Mobilicity
	Bundles	Bell, Rogers, Primus (excluding digital TV)
Regina SK	Wireline	SaskTel, Access Communications
	Wireless	SaskTel, Telus, Rogers
	Broadband Internet	SaskTel, Access Communications
	Mobile Internet	SaskTel, Telus, Rogers
	Bundles	SaskTel, Access Communications
Vancouver BC	Wireline	Telus, Shaw, Primus
	Wireless	Bell, Telus, Rogers, Primus, WIND, Mobilicity
	Broadband Internet	Telus, Shaw, Primus
	Mobile Internet	Bell, Telus, Rogers, Primus, WIND, Mobilicity
	Bundles	Telus, Shaw, Primus (excluding digital TV)
United States		
Boston MA	Wireline	Verizon, Comcast
	Wireless	AT&T, Verizon, Sprint
	Broadband Internet	Verizon, Comcast
	Mobile Internet	AT&T, Verizon, Sprint
	Bundles	Verizon, Comcast
Kansas City MO	Wireline	AT&T, Time Warner
	Wireless	AT&T, Verizon, Sprint
	Broadband Internet	AT&T, Time Warner
	Mobile Internet	AT&T, Verizon, Sprint
	Bundles	AT&T, Time Warner
Seattle WA	Wireline	Qwest, Comcast
	Wireless	AT&T, Verizon, Sprint
	Broadband Internet	Qwest, Comcast
	Mobile Internet	AT&T, Verizon, Sprint
	Bundles	Qwest, Comcast

Table A.4.1 Service providers surveyed (Part 2 of 2)

City	Service basket	Service providers
United Kingdom London	Wireline Wireless Broadband Internet Mobile Internet Bundles	BT, Virgin, Talk Talk Orange, Virgin, Vodafone BT, Virgin, Orange, AOL Broadband Orange, Virgin, Vodafone Virgin, BT (Orange for wireless)
Australia Sydney	All service baskets	Telstra, Optus
France Paris	All service baskets	Orange (France Telecom), SFR (Neuf Cegetel), Numericable
Japan Tokyo	Wireline Wireless Broadband Internet Mobile Internet Bundles	NTT, J:Com NTT DoCoMo, J:Com (Willcom), KDDI, eMobile NTT, J:Com, KDDI, Yahoo! BB NTT DoCoMo, J:Com (Willcom), KDDI, eMobile NTT, J:Com (Willcom)

Table A.4.2 Wireline service baskets

Calling assumptions	Minutes of use/month		
	Level 1	Level 2	Level 3
Outgoing (55%)	220	550	880
Incoming (45%)	180	450	720
Total minutes	400	1,000	1,600
Outgoing by time of day/week			
Peak (40%)	88	220	352
Off-peak (60%)	132	330	528
Outgoing long distance	10% of total	20% of total	30% of total
National	16	70	150
U.S.	6	30	80
Other (international)		10	34
Total	22	110	264
Outgoing to mobile	15% of total	15% of total	15% of total
Local	33	60	100
National		22.5	32
International			
Total	33	82.5	132
Average call length	3 minutes	3 minutes	3 minutes
Features			
Voice mail		Yes	Yes
Caller identification		Yes	Yes
Other			Yes (bundled, if available)

- Wireline pricing reflects flat-rate unlimited local calling in Canada and the United States; in the United Kingdom and France, wireline is priced on a per-minute metered basis; in Australia, wireline local calling is priced on a per-call basis but is otherwise unmetered.

Prices were surveyed from the three or four largest service providers in each country as outlined in Table A.4.1, and then weighted by the market share of each provider. Government sales taxes, such as GST or VAT, and one-time service installation charges were excluded. Industry-specific charges (such as 9-1-1 fees, universal service and regulatory charges in the United States, and television licence fees in the United

Kingdom) were included. Prices were converted to Canadian dollars using average February 2011 market exchange rates, and were also adjusted for purchasing power parity using February 2011 comparative price level indexes published by the OECD.

Canadian prices were compared to those in the United States, the United Kingdom, France, Australia, and Japan for wireline and mobile wireless services at three separate service levels, designed to reflect typical basic, standard, and high-end Canadian service consumption patterns (service basket Levels 1, 2, and 3). For broadband Internet services, an additional Level 4 basket was added in 2011 for higher-speed broadband service offerings (see Table A.4.5). Prices were also compared for mobile Internet access service in the above-mentioned countries, based on 3G or higher wireless technology at a monthly data usage level of 2 GB. As well, prices for bundles of three or four services were compared: Bundle 1 (wireline, mobile wireless, and broadband Internet), Bundle 2 (wireline, broadband Internet, and a basic digital television package), and Bundle 3 (wireline, mobile wireless, broadband Internet, and basic digital television). Level 2 service baskets were used in each of these bundles.

Table A.4.3 Wireless service baskets

Calling assumptions	Minutes of use/month		
	Level 1	Level 2	Level 3
Outgoing (60%)	90	270	720
Incoming (40%)	60	180	480
Total	150	450	1,200
Time of day/week			
Peak (40%)	60	180	480
Off-peak (60%)	90	270	720
Outgoing long distance	10% of total	10% of total	15% of total
National	9	21	90
U.S.		6	18
Other			
Total	9	27	108
Outgoing to mobile	50% of total	50% of total	50% of total
On-net (2/3)	30	90	240
Off-net (1/3)	15	45	120
Total	45	135	360
Average call length	3 minutes	3 minutes	3 minutes
Features			
Voice mail		Yes	Yes
Caller identification		Yes	Yes
Other			Yes
Data			
SMS		200	200
Data service			1 GB

- For Level 1 wireless service, both prepaid and post-paid plans were considered, with the selected price reflecting the least expensive option of the two. For Levels 2 and 3, post-paid plans (generally based on two-year contract rates) were assumed to be more economical. Handset costs are not reflected in these price comparisons.

Table A.4.4 Mobile Internet service basket

Elements	Level 1
Transmission speed	≥ 1.5 Mbps
Assumed data usage/month	2 GB
USB modem	No cost with contract; or rental/24-month amortization

Table A.4.5 Broadband (Internet access) service baskets

Elements	Level 1	Level 2	Level 3	Level 4
Transmission speed	Basic services ≤ 1.5 Mbps	1.5 – 9 Mbps (target ~ 5 Mbps)	10–20 Mbps (target ~ 15 Mbps)	20+ Mbps (target 20–40 Mbps)
Average data usage/month	2 GB	10 GB	30 GB	50 GB
Modem	Rental/24-month amortization	Rental/24-month amortization	Rental/24-month amortization	Rental/24-month amortization

Table A.4.6 Bundled service baskets

Service elements	Bundle 1 Triple-play	Bundle 2 Triple-play	Bundle 3 Quadruple-play
Wireline	Wireline Level 2 usage	Wireline Level 2 usage	Wireline Level 2 usage
Wireless	Wireless Level 2 usage		Wireless Level 2 usage
Broadband	Broadband Level 2 usage	Broadband Level 2 usage	Broadband Level 2 usage
Television		Basic digital TV package	Basic digital TV package

Telecommunications market sector description

A) Wireline voice

Wireline voice-related telecommunications services can be divided into two broad market segments: (i) local and access services, and (ii) long distance services.

i) Local and access services

The local and access segment is composed of wireline services relating to access and connectivity to the PSTN, and includes services used by both retail and wholesale customers.

Local wireline telephone service enables customers to place unlimited calls within a defined local calling area for a basic monthly fee. This service is either access-dependent or access-independent. Access-dependent service includes managed wireline access from the TSP to the customer, a connection to the PSTN, and a telephone number. Access-independent service does not include the managed wireline access component. Customers of access-independent service must subscribe to broadband Internet service, which serves as the access component.

Local wireline telephone service includes automated call answering, business Centrex, and ISDN services, as well as other ancillary services such as inside wiring, installation and repair, teleconferencing, and miscellaneous local services.

Local and access service revenues include revenues from the sale of local services on a wholesale basis and, with the introduction of local competition, revenues from the sale of access services for interconnection between carriers and other service providers, including switching and aggregation, and from the sale of unbundled network components.

ii) Long distance services

Retail long distance services encompass wireline voice traffic to locations outside the local service calling area. These services are sold in a variety of ways, such as through a standard per-minute charge, a monthly subscription plan, calling cards, or a bundle with other services.

Wholesale long distance services refer to services, provided under connection arrangements, between a facilities-based TSP and a long distance TSP to transit long distance minutes, and b) the sale of wholesale bulk long distance minutes by facilities-based TSPs to resellers of long distance service.

B) Internet

Internet-related telecommunications services can be divided into two broad market segments: (i) Internet access and transport, and (ii) Internet applications and other Internet-related services.

i) Internet access and transport

Internet access involves the provision of an IP connection to an end-user, which enables the end-user to exchange application traffic with Internet hosts and other end-users. Internet access service consists of three major components:

- a) a data connection between a modem at the end-user's location (such as a residential dwelling) and the ISP;
- b) ISP facilities, which include
 - o routers, to switch traffic between ISP end-users and the Internet at large,
 - o servers, to provide in-house ISP services, such as email, and
 - o network management elements; and
- c) a connection from the ISP to the Internet.

Internet access services are available at a variety of speeds. Low-speed, or narrowband, access services operate at speeds of up to 64 Kbps and are typically provided using dial-up access lines. High-speed access services, including wideband (up to 1.5 Mbps) and broadband (faster than 1.5 Mbps), generally operate using DSL, coaxial cables, terrestrial wireless technologies, satellites, or fibre optic cables.

Internet transport service is a type of Internet connectivity service typically sold to ISPs and some larger business customers. Internet transport capacity is provided over Internet backbone facilities that carry aggregated traffic across domestic and international links between Internet traffic switches or routers. Internet transport service provides partial control over the movement of customers' Internet traffic. In some cases, peering arrangements between Internet backbone service providers substitute for the outright purchase of Internet transport by one ISP from another.

ii) Internet applications and other Internet-related services

A growing number of Internet application services, including email and Web hosting, piggyback on Internet connectivity services. Internet application services are typically bundled together with Internet access services. However, TSPs also participate in emerging stand-alone business Internet application service markets, which include services such as premium Web hosting services, Internet data centre and off-site data storage services, and security and firewall services.

C) Data and private line

Data services include managed LAN and WAN services for data, video, and voice networks within a metropolitan area or on a national or international scale. Data services include legacy protocols such as X.25 (packet switched WAN communication), ATM, and frame relay; newer protocols such as Ethernet and IP-VPN; and the provisioning and management of networks and related equipment.

Private line services provide the capability to link two or more locations over dedicated facilities for the purpose of transporting data, video, or voice traffic. These services include high-capacity digital transmission services (at speeds ranging up to gigabit speeds over fibre) and digital data systems, as well as voice-grade and other analog services. Transmission facilities for private line services include copper wire, fibre optic cable, and satellite facilities.

D) Wireless

Wireless services are composed of telecommunications services provided via mobile wireless access facilities. These services include mobile telephony, mobile data (such as text messaging), roaming, wireless Internet access, and paging services. Data related to satellite private line services are included in the “Data and private line” section of this report, while data related to the satellite services associated with mobile telephones are included in the “Wireless” section of this report.

In addition to enabling voice communications over wireless networks, new wireless technologies are enabling users to send text messages and multi-media messages, including photos, graphics, videos, and audio clips, from one device to another. Inter-carrier text messaging and data sharing between users have been in place for several years and are expected to continue to grow as existing and new carriers forge network agreements, and terminal equipment makers introduce new devices.

Mobile wireless services are generally billed on a usage basis for both voice and data services. Subscribers have a choice of two payment plan options: prepaid and post-paid. Under prepaid plans, subscribers must purchase the wireless service prior to use, while under post-paid plans, subscribers must pay monthly after using the service. Customers typically pay a per-minute rate under prepaid plans. However, under post-paid plans, customers pay for a service package that includes defined minutes of use, an overage minute rate, data features, and other optional services such as voice mail, call display, and call waiting services.

List of acronyms used in the report

ACEPU	average capital expenditure per user
ARPM	average revenue per minute
ARPU	average revenue per user
ASC	Advertising Standards Canada
ATM	asynchronous transfer mode
AWS	advanced wireless service
BDU	broadcasting distribution undertaking
CAB	Canadian Association of Broadcasters
CAGR	compound annual growth rate
capex	capital expenditure
CBC	Canadian Broadcasting Corporation
CBSC	Canadian Broadcast Standards Council
CCD	Canadian Content Development
CLEC	competitive local exchange carrier
CMF	Canadian Media Fund
CPAC	Cable Public Affairs Channel
CPE	Canadian programming expenditures
CPI	Consumer Price Index
CRTC, the Commission	Canadian Radio-television and Telecommunications Commission
CTD	Canadian Talent Development
CTF	Canadian Television Fund
DCS	Data collection system
DNA	digital network access
DNCL	Do Not Call List
DSL	digital subscriber line
DTH	direct-to-home
EBITDA	earnings before interest, taxes, depreciation and amortization
FTTH	fibre-to-the-home

FTTx	fibre-to-the-x where x is a generalization of various configuration of fibre deployment (e.g. home, node, etc.)
GAS	gateway access service
GB	gigabyte
GDP	gross domestic product
GST	goods and services tax
HD	high definition
high-speed DNA	high-speed intra-exchange digital network access
HSDS	high-speed digital service
HSPA	high-speed packet access
HSPA+	evolved high-speed packet access
ID	identification
IAB Canada	Interactive Advertising Bureau of Canada
ILEC	incumbent local exchange carrier
IMF	International Monetary Fund
IP	Internet Protocol
IPTV	Internet Protocol television
IP-VPN	Internet Protocol – virtual private network
ISDN	integrated services digital network
ISP	Internet service provider
kbps	kilobits per second
LAN	local area network
LEC	local exchange carrier
LPIF	Local programming improvement fund
LTE	long-term evolution
mbps	megabits per second
MDS	multipoint distribution service
MTM	Media Technology Monitor
MVNO	mobile virtual network operator
MWS	metropolitan wavelength services
n.a.	not available
n.m.	not meaningful
NRA	national regulatory authority

OECD	Organisation for Economic Co-operation and Development
OMDC	Ontario Media Development Corporation
OTA	over-the-air
PBIT	profit before interest and taxes
PBX	private branch exchange
PPM	portable people meter
PPP	Purchasing Power Parity
PPV	pay-per-view
PST	provincial sales tax
PSTN	public switched telephone network
RDU	radiocommunication distribution undertakings
SD	standard definition
SMS	short message service
SRDU	satellite relay distribution undertaking
TPI	telephone price index
TPIA	third-party Internet access
TSP	telecommunications service provider
VAT	value-added tax
VDSL	very high bit rate digital subscriber line
VOD	video-on-demand
VoIP	voice over Internet Protocol
VPOP	virtual point of presence
WAN	wide area network
WSP	wireless service provider
3G	third-generation
4G	fourth-generation

List of decisions, public notices, orders, circulars, and regulatory policies referenced in the report

Broadcasting

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Broadcasting Decision 2002-45	<i>Revocation of the licences of exempted small cable distribution undertakings, Broadcasting Decision CRTC 2002-45, 19 February 2002</i>
Broadcasting Decision 2002-88	<i>Revocation of the licences of exempted small cable distribution undertakings, Broadcasting Decision CRTC 2002-88, 17 April 2002</i>
Broadcasting Decision 2004-382	<i>Revocation of licences – Exempted cable broadcasting distribution undertakings that serve up to 6,000 subscribers, Broadcasting Decision CRTC 2004-382, 30 August 2004, as amended by Broadcasting Decision CRTC 2004-382-1, 18 January 2005</i>
Broadcasting Decision 2007-165	<i>Transfer of effective control of CHUM Limited to CTVglobemedia Inc., Broadcasting Decision CRTC 2007-165, 8 June 2007</i>
Broadcasting Decision 2007-359	<i>Acquisition of assets, Broadcasting Decision CRTC 2007-359, 28 September 2007, as amended by Broadcasting Decision CRTC 2007-359-1, 3 December 2007</i>
Broadcasting Decision 2007-360	<i>Transfer of effective control of 1708487 Ontario Inc., 1738700 Ontario Inc. and CHUM Television Vancouver Inc. to Rogers Media Inc., Broadcasting Decision CRTC 2007-360, 28 September 2007</i>
Broadcasting Decision 2007-368	<i>Acquisition of assets, Broadcasting Decision CRTC 2007-368, 12 October 2007</i>
Broadcasting Decision 2007-429	<i>Transfer of effective control of Alliance Atlantis Broadcasting Inc.'s broadcasting companies to CanWest MediaWorks Inc., Broadcasting Decision CRTC 2007-429, 20 December 2007</i>
Broadcasting Decision 2007-434	<i>Exchange of radio assets, Broadcasting Decision CRTC 2007-434, 24 December 2007</i>
Broadcasting Decision 2008-71	<i>Acquisition of assets, Broadcasting Decision CRTC 2008-71, 31 March 2008, as amended by Acquisition of assets – Correction to a condition of licence, Broadcasting Decision CRTC 2008-71-1, 4 June 2008</i>
Broadcasting Decision 2008-72	<i>Acquisition of assets – CHNM-TV and CHNM-DT Vancouver and their transmitters in Victoria, Broadcasting Decision CRTC 2008-72, 31 March 2008</i>

Broadcasting Decision 2008-128	<i>CHRC Québec – Acquisition of assets</i> , Broadcasting Decision CRTC 2008-128, 26 June 2008, as amended by <i>CHRC Québec – Acquisition of assets – Correction to a condition of licence</i> , Broadcasting Decision CRTC 2008-128-1, 3 July 2008; and <i>CHRC Québec – Acquisition of assets – Addition of a condition of licence</i> , Broadcasting Decision CRTC 2008-128-2, 29 September 2008
Broadcasting Decision 2008-129	<i>Change in the effective control of TQS inc. and licence renewals of the television programming undertakings CFJP-TV Montréal, CFJP-DT Montréal, CFAP-TV Québec, CFKM-TV Trois-Rivières, CFKS-TV Sherbrooke, CFRS-TV Saguenay and of the TQS network</i> , Broadcasting Decision CRTC 2008-129, 26 June 2008
Broadcasting Decision 2008-130	<i>Canadian Broadcasting Corporation – Acquisition of assets</i> , Broadcasting Decision CRTC 2008-130, 26 June 2008
Broadcasting Decision 2008-138	<i>Change in effective control</i> , Broadcasting Decision CRTC 2008-138, 7 July 2008
Broadcasting Decision 2008-206	<i>Change in effective control</i> , Broadcasting Decision CRTC 2008-206, 22 August 2008
Broadcasting Decision 2009-279	<i>Renewal of the broadcasting licences for private conventional television stations considered at the 27 April 2009 Gatineau public hearing – Initial decisions and scope of subsequent policy proceeding</i> , Broadcasting Decision CRTC 2009-279, 15 May 2009
Broadcasting Decision 2009-536	<i>CJNT-TV Montréal – Acquisition of assets</i> , Broadcasting Decision CRTC 2009-536, 28 August 2009
Broadcasting Decision 2009-537	<i>CHCH-TV Hamilton and its transmitters and CHCH-DT Hamilton – Acquisition of assets</i> , Broadcasting Decision CRTC 2009-537, 28 August 2009
Broadcasting Decision 2009-699	<i>CHEK-TV Victoria and its transmitters – Acquisition of assets</i> , Broadcasting Decision CRTC 2009-699, 9 November 2009
Broadcasting Decision 2009-706	<i>Sex TV: The Channel and Drive-In Classics Channel – Acquisition of assets</i> , Broadcasting Decision CRTC 2009-706, 19 November 2009
Broadcasting Decision 2009-746	<i>CKTG-FM and CJUK-FM Thunder Bay – Acquisition of assets</i> , Broadcasting Decision CRTC 2009-746, 2 December 2009
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Broadcasting Decision 2010-782	<i>Change in the effective control of Canwest Global Communications Corp.'s licensed broadcasting</i>

	<i>subsidiaries</i> , Broadcasting Decision CRTC 2010-782, 22 October 2010
Broadcasting Decision 2010-792	<i>travel + escape – Corporate reorganization (acquisition of assets), and transfer of ownership and control</i> , Broadcasting Decision CRTC 2010-792, 26 October 2010
Broadcasting Decision 2010-942	<i>Transfer of effective control of various commercial radio programming undertakings from Corus Entertainment Inc. to Cogeco inc.</i> , Broadcasting Decision CRTC 2010-942, 17 December 2010
Broadcasting Decision 2011-163	<i>Change in effective control of CTVglobemedia Inc.'s licensed broadcasting subsidiaries</i> , Broadcasting Decision CRTC 2011-163, 7 March 2011
Public Notice 1997-25	<i>New regulatory framework for broadcasting distribution undertakings</i> , Public Notice CRTC 1997-25, 11 March 1997
Public Notice 1999-205	<i>Definitions for new types of priority programs; revisions to the definitions of television content categories; definitions of Canadian dramatic programs that will qualify for time credits towards priority programming requirements</i> , Public Notice CRTC 1999-205, 23 December 1999
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Broadcasting Public Notice 2006-143	<i>Exemption order respecting certain network operations</i> , Broadcasting Public Notice CRTC 2006-143, 10 November 2006
Broadcasting Public Notice 2006-158	<i>Commercial Radio Policy 2006</i> , Broadcasting Public Notice CRTC 2006-158, 15 December 2006
Broadcasting Public Notice 2008-77	<i>Applications processed pursuant to streamlined procedures</i> , Broadcasting Public Notice CRTC 2008-77, 3 September 2008
Broadcasting Notice of Consultation 2010-783	<i>Review of the regulatory framework relating to vertical integration</i> , Broadcasting Notice of Consultation CRTC 2010-783, 22 October 2010
Broadcasting Notice of Consultation 2010-783-2	<i>Review of the regulatory framework relating to vertical integration – Additional issue</i> , Broadcasting Notice of Consultation CRTC 2010-783-2, 8 February 2011
Broadcasting Regulatory Policy 2010-57	<i>Revised lists of eligible satellite services – Annual compilation of amendments</i> ,

	Broadcasting Regulatory Policy CRTC 2010-57, 4 February 2010
Broadcasting Regulatory Policy 2010-167	<i>A group-based approach to the licensing of private television services</i> , Broadcasting Regulatory Policy CRTC 2010-167, 22 March 2010
Broadcasting Regulatory Policy 2011-43	<i>Revised lists of eligible satellite services – Annual compilation of amendments</i> , Broadcasting Regulatory Policy CRTC 2011-43, 25 January 2011
<i>Telecommunications</i>	
Telecom Decision 94-19	<i>Review of regulatory framework</i> , Telecom Decision CRTC 94-19, 16 September 1994
Telecom Decision 2006-15	<i>Forbearance from the regulation of retail local exchange services</i> , Telecom Decision CRTC 2006-15, 6 April 2006, as amended by Order in Council P.C. 2007-532, 4 April 2007
Forbearance Order	<i>Order Varying Telecom Decision CRTC 2006-15</i> , P.C. 2007-532, 18 April 2007
Policy Direction	<i>Order Issuing a Direction to the CRTC on Implementing the Canadian Telecommunications Policy Objectives</i> , P.C. 2006-1534, 14 December 2006
HSDS Decision	<i>Framework for forbearance from regulation of high-speed intra-exchange digital network access services</i> , Telecom Decision CRTC 2007-35, 25 May 2007

List of Canadian companies referenced in the report

Access Communications	Access Communications Co-operative Limited
Astral	Astral Media Inc.
Atria	Atria Networks L.P.
Barrett	Xplornet Communications Inc.
BCE	Bell Canada Enterprises
Bell Aliant	Bell Aliant Regional Communications, Limited Partnership
Bell Canada	Bell Canada
Bell Group	Bell Canada; Bell Mobility Inc.; Latitude Wireless Inc.; NorthernTel, Limited Partnership; Northwestel Mobility Inc.; SkyTerra (Canada) Inc.; SkyTerra Corp.; Télébec, Limited Partnership; and Virgin Mobile Canada
Bell Mobility	Bell Mobility Inc.
Bragg	Bragg Communications Inc.
Canwest	Canwest Media Inc.
CBC	Canadian Broadcasting Corporation
Cogeco	Cogeco Canada L.P., Cogeco Câble Québec s.e.n.c. and Cogeco Inc.
Corus	Corus Entertainment Inc.
Crossroads	Crossroads Television System
CTV	CTV Inc. (CTVglobemedia Inc., CTV Inc., CTV Limited, and CTV Corp. amalgamated on 15 March 2011 as CTV Inc.)
Distributel	Distributel Communications Limited
EastLink	EastLink
Hydro One	Hydro One Telecom Inc.
Latitude Wireless	Latitude Wireless Inc.
MTS Allstream	MTS Allstream Inc.
NorthernTel	NorthernTel, Limited Partnership
Northwestel	Northwestel Inc.
Northwestel Mobility	Northwestel Mobility Inc.
Quebecor	Quebecor Media Inc.
Primus	Primus Telecommunications Canada Inc.
Remstar	Remstar (V)

Rogers	Rogers Broadcasting Limited, Rogers Cable Communications Inc., Rogers Communications Inc. and Rogers Wireless Inc.
SaskTel	Saskatchewan Telecommunications
Shaw	Shaw Communications Inc.
SkyTerra	SkyTerra (Canada) Inc. and SkyTerra Corp.
SRC	Société Radio-Canada
Star Choice	Star Choice Television Network Incorporated
TBayTel	TBayTel
TCC	TELUS Communications Company
TELUS	TELUS Communications Inc.
Télébec	Télébec, Limited Partnership
Télé-Québec	Télé-Québec
Videotron	Videotron Ltd.
Virgin Mobile	Virgin Mobile Canada
WIND	WIND Mobile
Xplornet	Xplornet Communications Inc.
YAK	YAK Communications (Canada) Corp.