

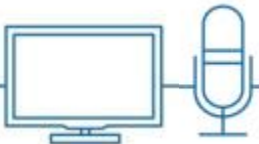
SPRING 2015 PPM WEBINAR

BellMedia



Agenda

- Exploring Emotional Connection with Media
- Current PPM Results by Market
 - Vancouver
 - Toronto
 - Edmonton
 - Calgary
 - Montreal Franco
 - Montreal Anglo



Exploring our connection with media

Have you ever wondered how RADIO formats and TV programs connect with different audiences?



MAKE IT ON THE PODIUM

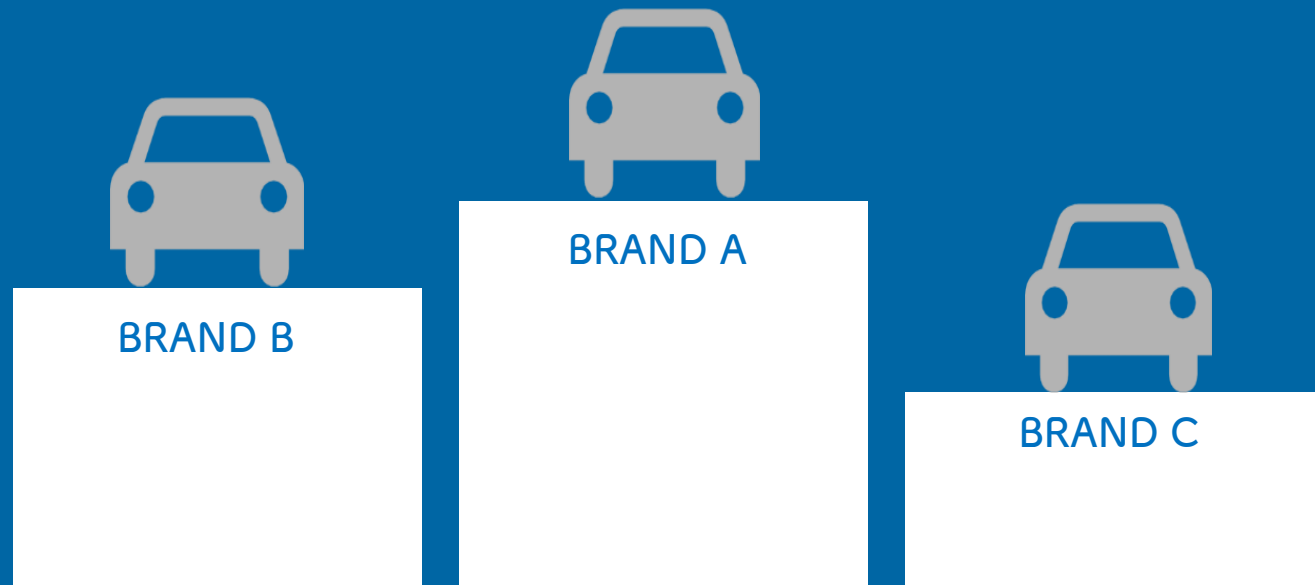
A consideration strategy for your brand.



BellMedia

Investing in short term sales only = short term thinking.

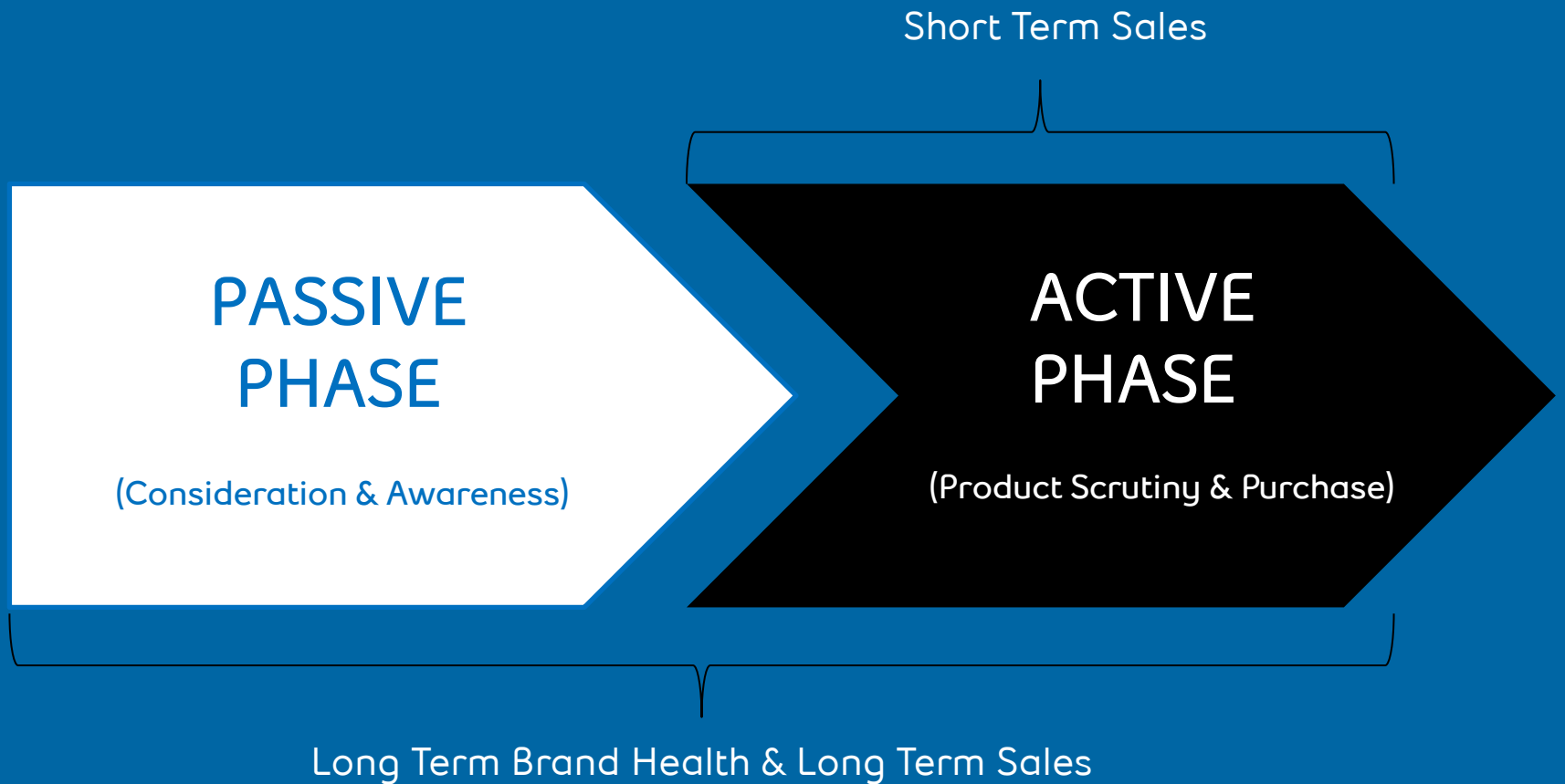
Making it to the top 3 takes time and a sustainable brand strategy.



EMOTIONAL
CONNECTIVITY IS
ESSENTIAL FOR THE
ADVERTISING PLAN

Which media are capable of
**ESTABLISHING &
SUSTAINING YOUR
BRAND VALUE**
over time?

TV, RADIO, AND OOH IMPACT IMPORTANT
PURCHASE CYCLES BY REACHING
MASS CONSUMERS
AND TARGETS THEM WITH A
POWERFUL ADVERTISING EXPERIENCE.





TELEVISION

SEASON ONE FINALE COMPARISON

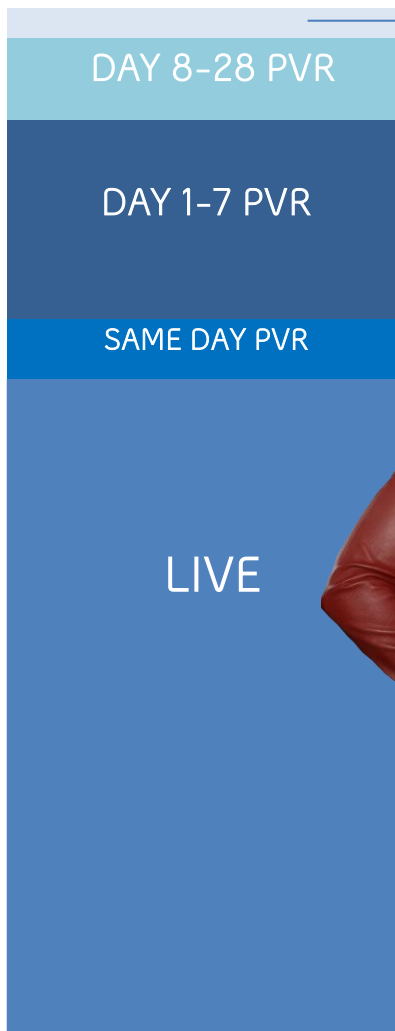
how to get away with *Murder*

GREY'S ANATOMY

1.5M



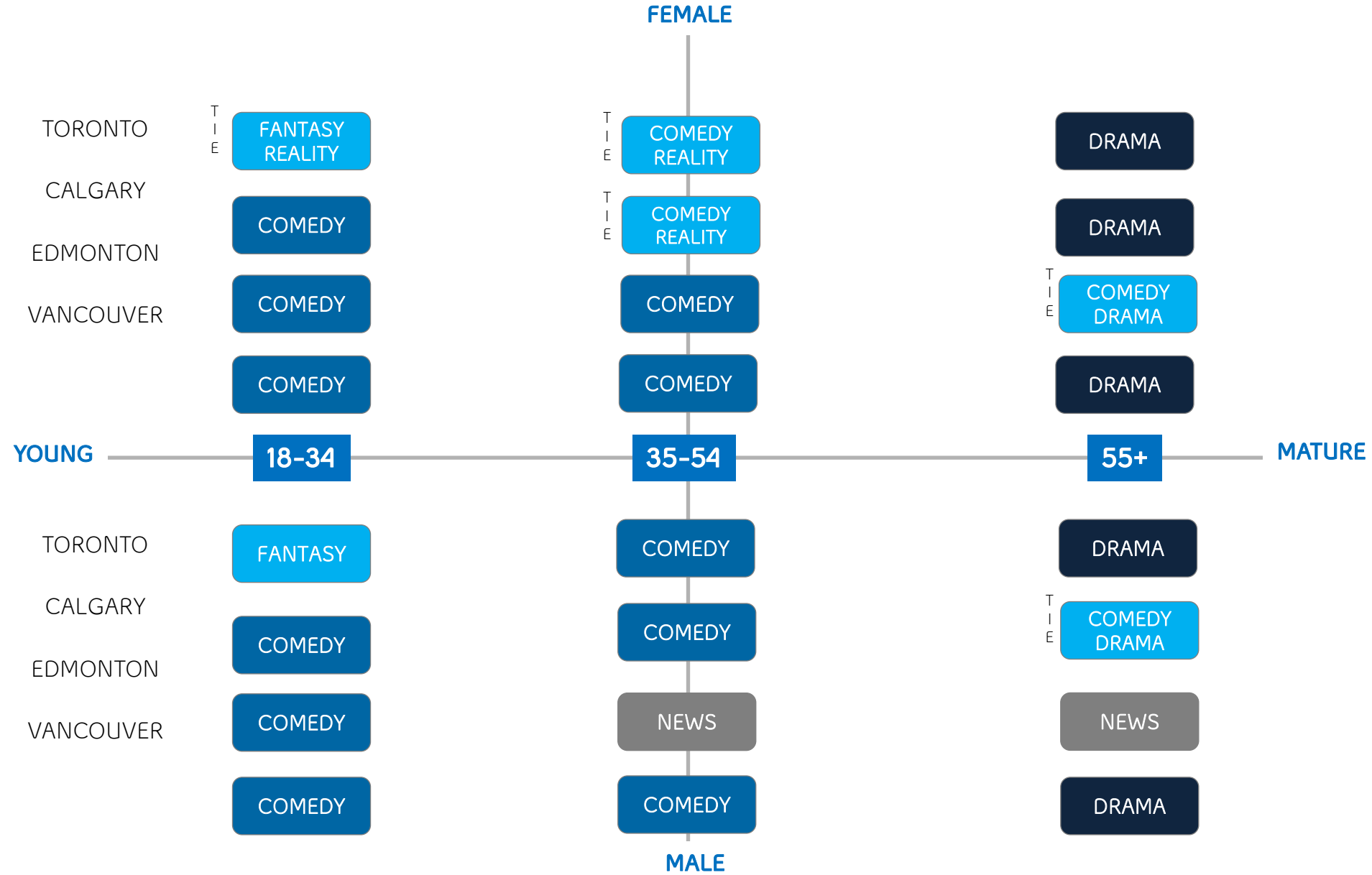
1.9M

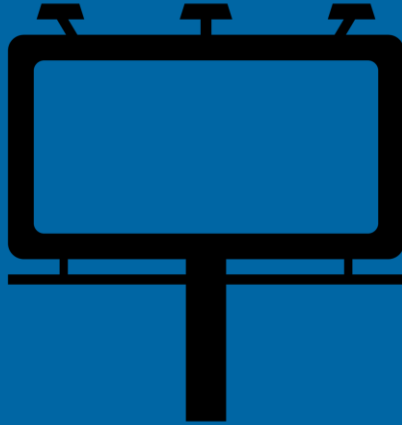


CTV.ca, CTV GO, STB VOD



TOP GENRES BY MARKET – LOYALTY DAILY (%)





OUT OF HOME

ENGAGING CONSUMERS THROUGHOUT THEIR DAY

Digital Boards

Posters

Street Furniture



RELEVANCE - TIMELINESS - CREATIVE

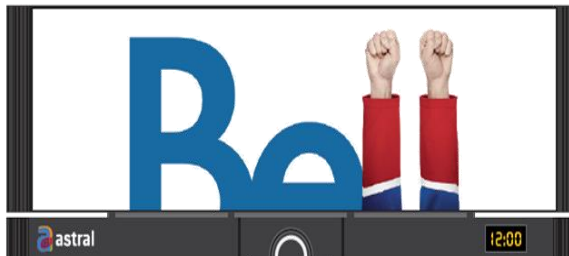
DRIVING EMOTIONAL RESPONSES



ANTICIPATION



LOVE



EXCITEMENT



FORGIVENESS



RADIO

TOP FORMATS BY MARKET – TIME SPENT LISTENING

FEMALE

TORONTO

AC

AC

NEWS/TALK

CALGARY

COUNTRY

CLAS. ROCK/
CLAS. HITS

NEWS/TALK

EDMONTON

HOT AC

COUNTRY

NEWS/TALK

VANCOUVER

COUNTRY

OLDIES

NEWS/TALK

T
I
E

YOUNG

18-34

35-54

55+

MATURE

TORONTO

SPORTS

SPORTS

NEWS/TALK

CALGARY

CLAS. ROCK/
CLAS. HITS

SPORTS

NEWS/TALK

EDMONTON

SPORTS

NEWS/TALK

COUNTRY

VANCOUVER

ROCK

COUNTRY

NEWS/TALK

MALE

T
I
E

PPM RESULTS

SPRING 2015 (March 2 – May 31, 2015)



Noteworthy Events That May Affect The Tuning

Holidays and Special Events

- March Break
- St. Patrick's Day
- Earth Hour
- Daylight Savings Time
- JUNO Awards
- Good Friday/Easter Sunday & Monday
- Country Music Awards
- Mother's Day
- Billboard Music Awards
- Victoria Day
- David Letterman's Last Late Night Show



Local News

- University/School Strikes
- Two Men guilty of Terrorism Plots of VIA Rail Derailment
- Power outages due to GTA storms
- Future Shop Closes all Stores across Canada
- Air Canada Flight Crashes in Halifax
- CBC eliminates 140+ jobs
- Target announces store closures
- Shad replaces Jian Ghomeshi
- Rob Ford Cancer Updates



Sports News

- NHL Trade Deadline
- NHL Draft Picks
- NHL Playoffs Begin
- NBA Playoffs Begin
- NCAA March Madness
- MLB Season Start
- Toronto Maple Leafs Playoff Games
- Raptors Playoff Games
- Golf Championships
- Mayweather and Pacquiao Fight of the Century
- Tom Brady Suspension for Deflating Footballs
- Canada wins Gold over Russia
- Mike Babcock named Maple Leafs Head Coach on 8 Year Contract



World News

- Police officers shot in Ferguson during Missouri Protests
- Ted Cruz announces candidacy for US president
- Germanwings- Intentional plane crash in southern France, killing 150
- Nepal Earthquake kills thousands
- Bruce Jenner Transitioning Interview
- Boston Marathon Bomber Found Guilty
- Kenyan University Massacre
- Riots in Baltimore
- Birth of the Royal Baby
- B.B King dies
- Omar Khadr released on Bail





VANCOUVER



VANCOUVER – REACH AND HOURS/WK.

REACH



94%

HOURS/WK.



9.4h

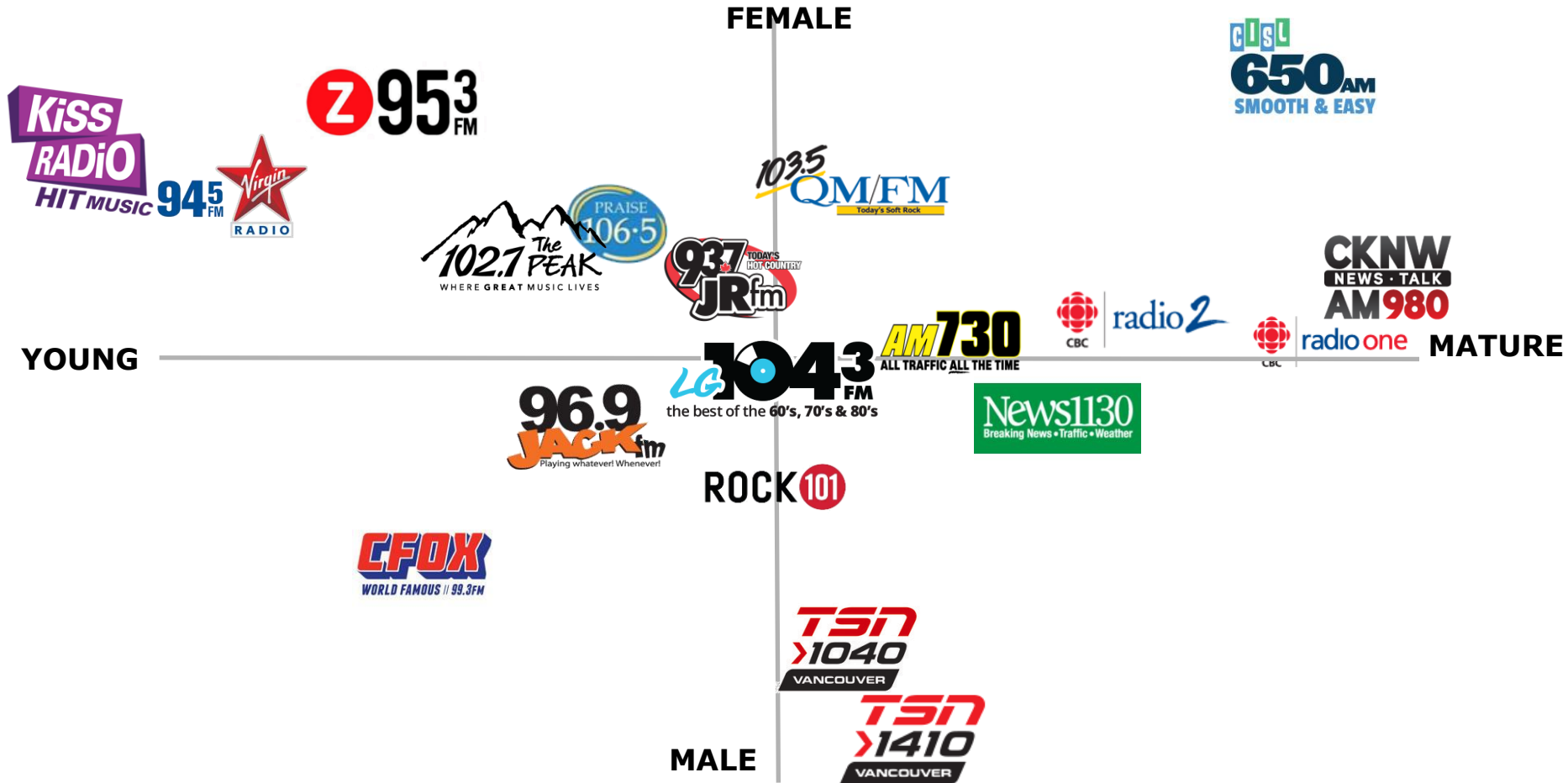
Market changes:

- ✓ 94.5 The Beat rebranded to 94.5 Virgin Radio
- ✓ Sonic 104.9 is now Kiss Radio



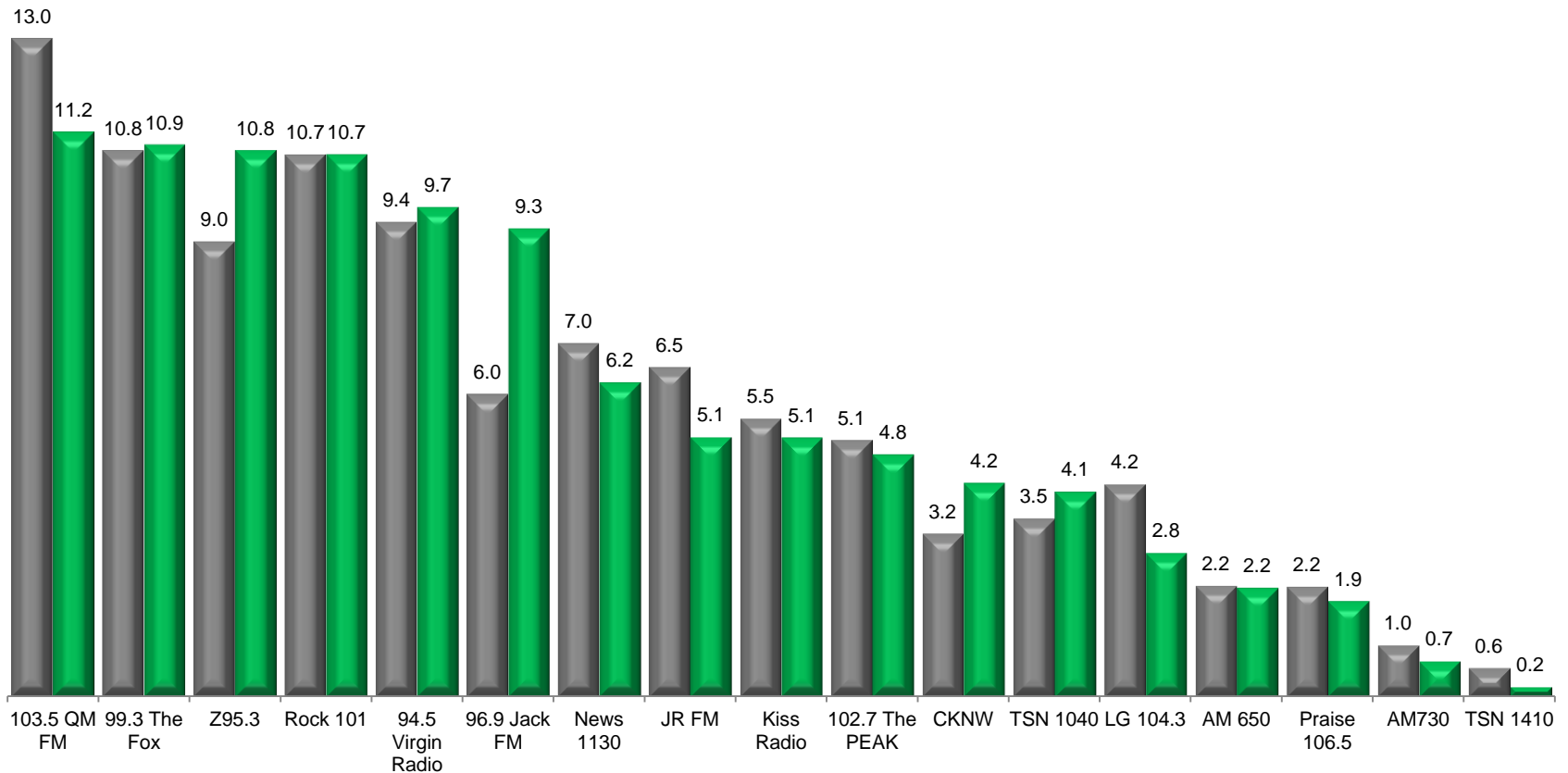
BellMedia

VANCOUVER LANDSCAPE

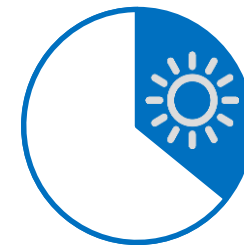


Commercial Share (%) A18-54

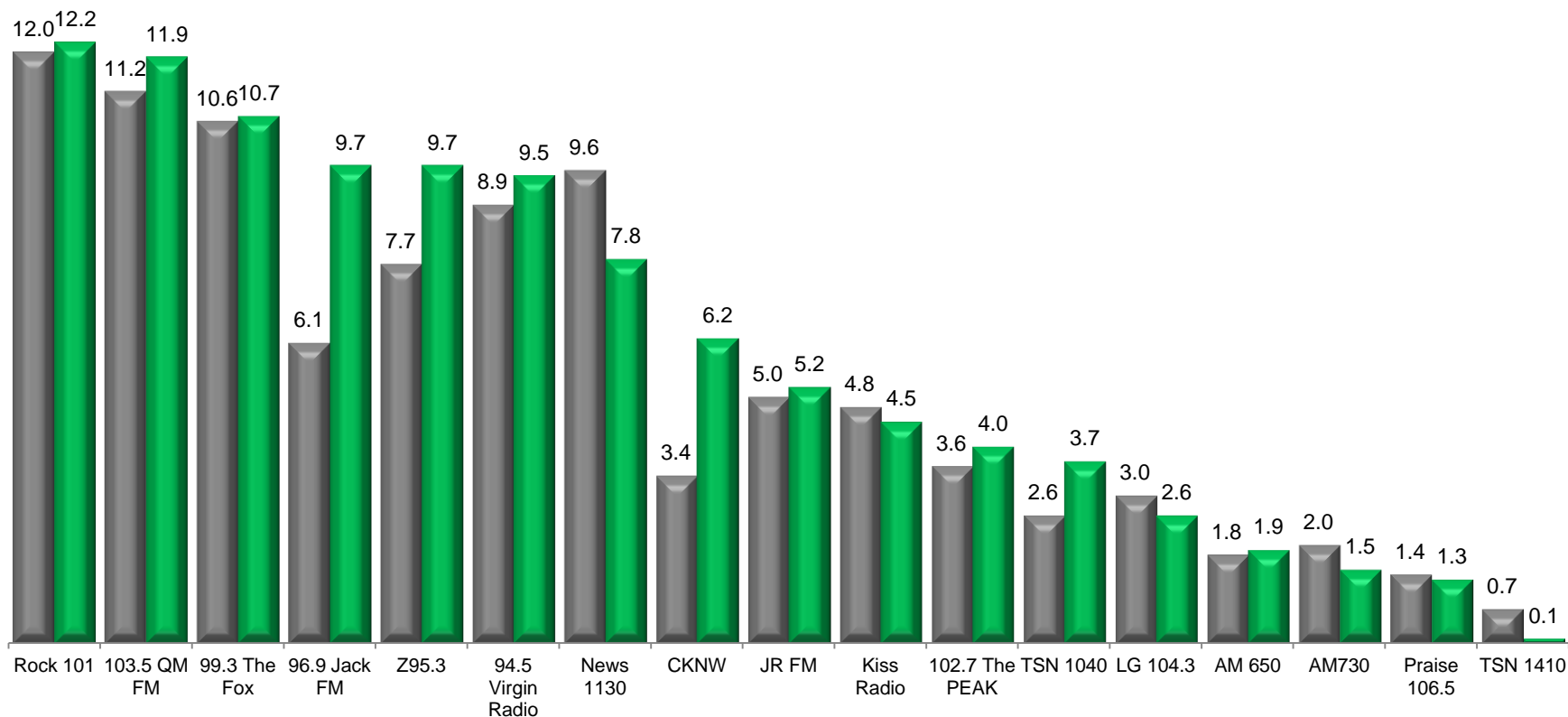
■ Winter 14/15 (Dec 1, 2014-March 1, 2015) ■ Spring 2015 (March 2 - May 31, 2015)



BREAKFAST timeblock's AMA(000) Adults 18-54



■ Winter 14/15 (Dec 1, 2014-March 1, 2015) ■ Spring 2015 (March 2 - May 31, 2015)

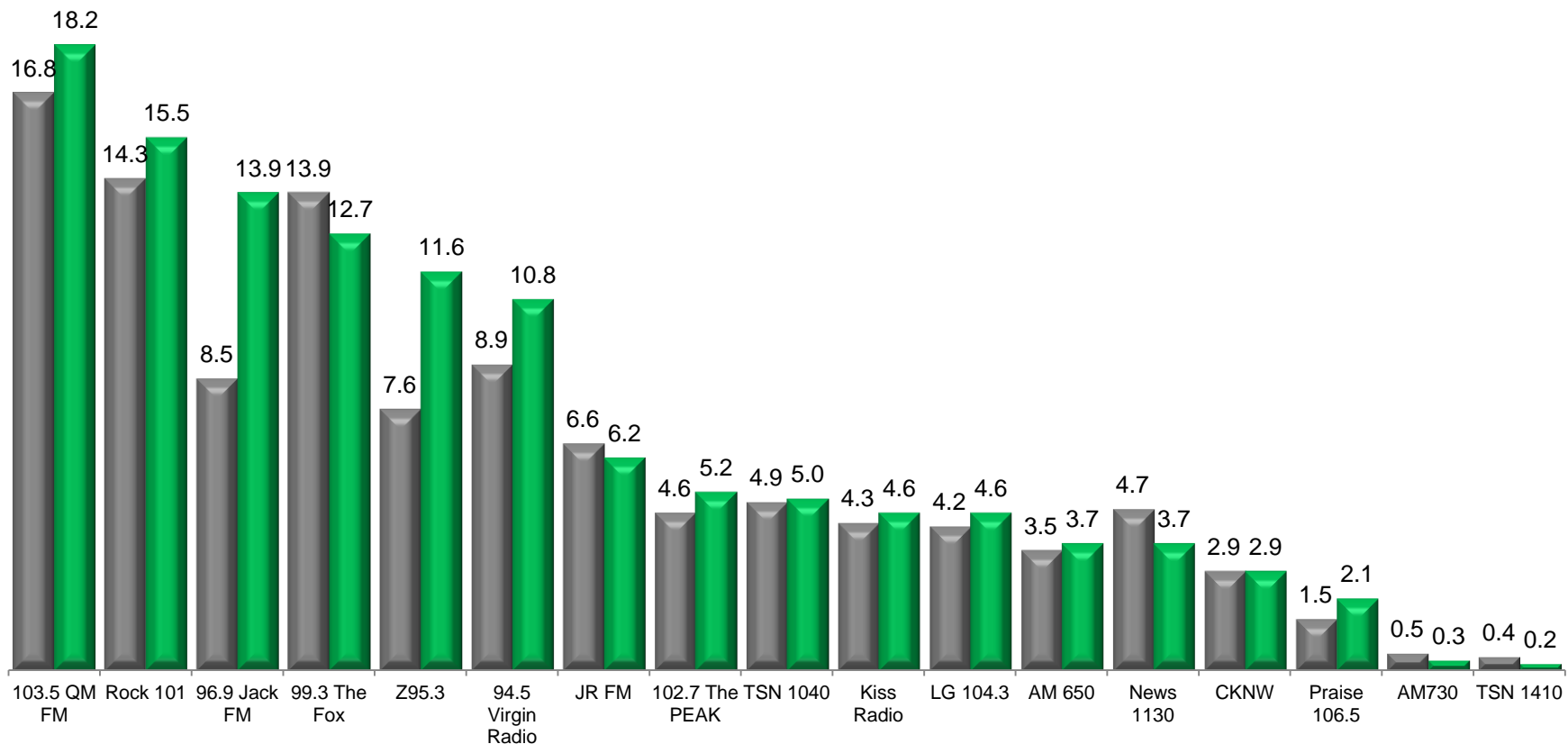


DAY timeblock's AMA(000) Adults 18-54

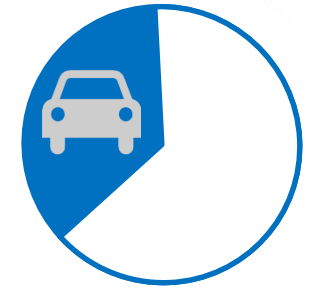


■ Winter 14/15 (Dec 1, 2014-March 1, 2015)

■ Spring 2015 (March 2 - May 31, 2015)

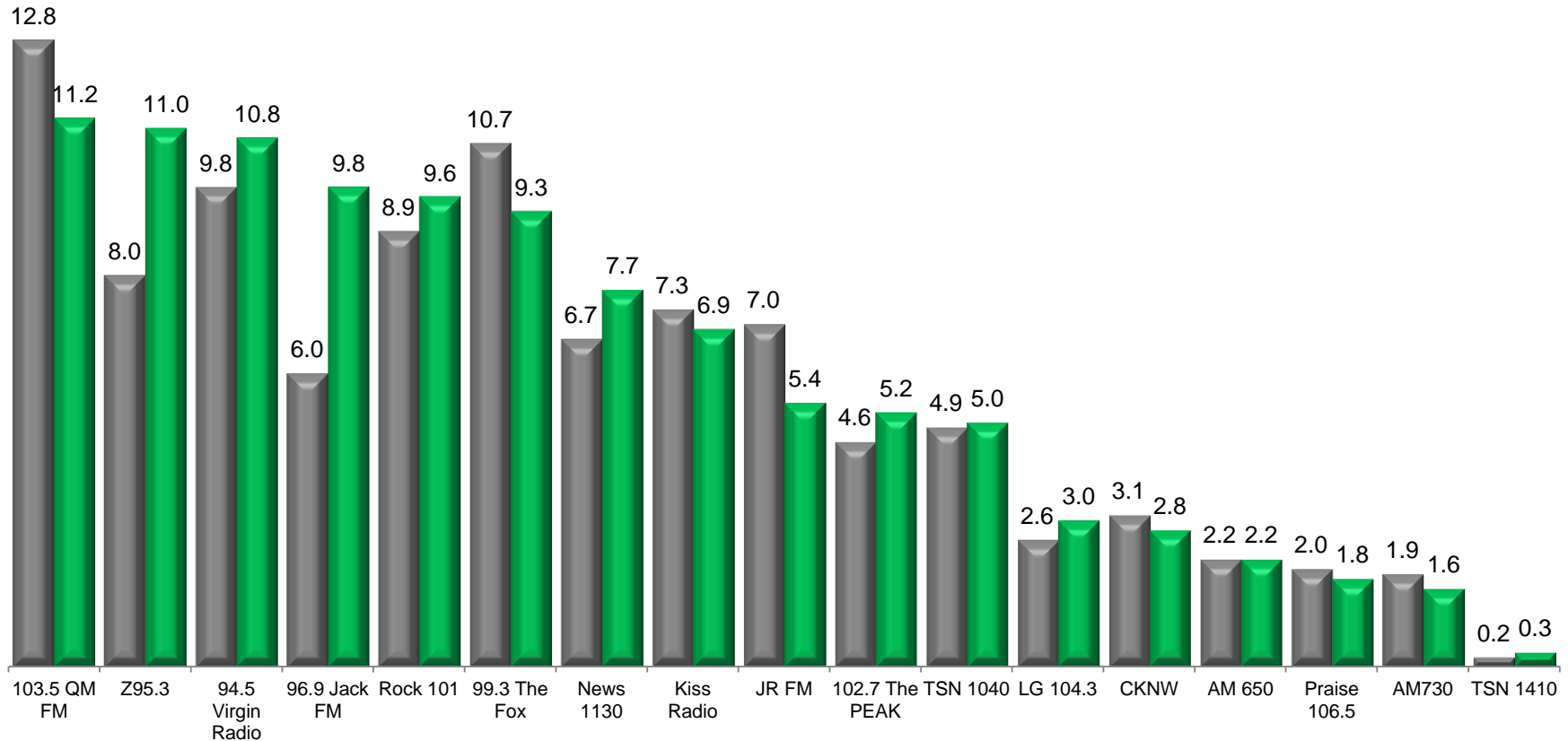


DRIVE timeblock's AMA(000) Adults 18-54



■ Winter 14/15 (Dec 1, 2014-March 1, 2015)

■ Spring 2015 (March 2 - May 31, 2015)



TORONTO



TORONTO – REACH AND HOURS/WK.

REACH



95%

HOURS/WK.



8.8h



TORONTO

FEMALE

fresh 104.5
RADIO 95.3
HAMILTON'S HIT MUSIC

CHUM FM
Today's Best Music

KX947
New Country FM

Jewel
88.5
Life & Refreshing

G987
The way we groove

981CHFI
Toronto's Perfect Music Mix

Classical 96.3
fm
THE NATION'S CLASSICAL STATION

THE NEW
AM 740
Zoomer radio

KISS
92.5
HIT MUSIC

999 FM
Z103.5
Virgin
RADIO

Talk Radio
AM640

JAZZ.FM91  **radio one**

IN-DEPTH
RADIO
NEWSTALK
1010

YOUNG

MATURE

102.1 the edge
INDIE88

1650 AM
CINA Radio

boom 97.3


10 News
NEWS RADIO

 **radio 2**

FLOW
93.5
FM
ALL THE BEST
THROWBACKS

Q107
TORONTO'S ROCK

SN590
THE FAN

TSN
RADIO
1050

MALE



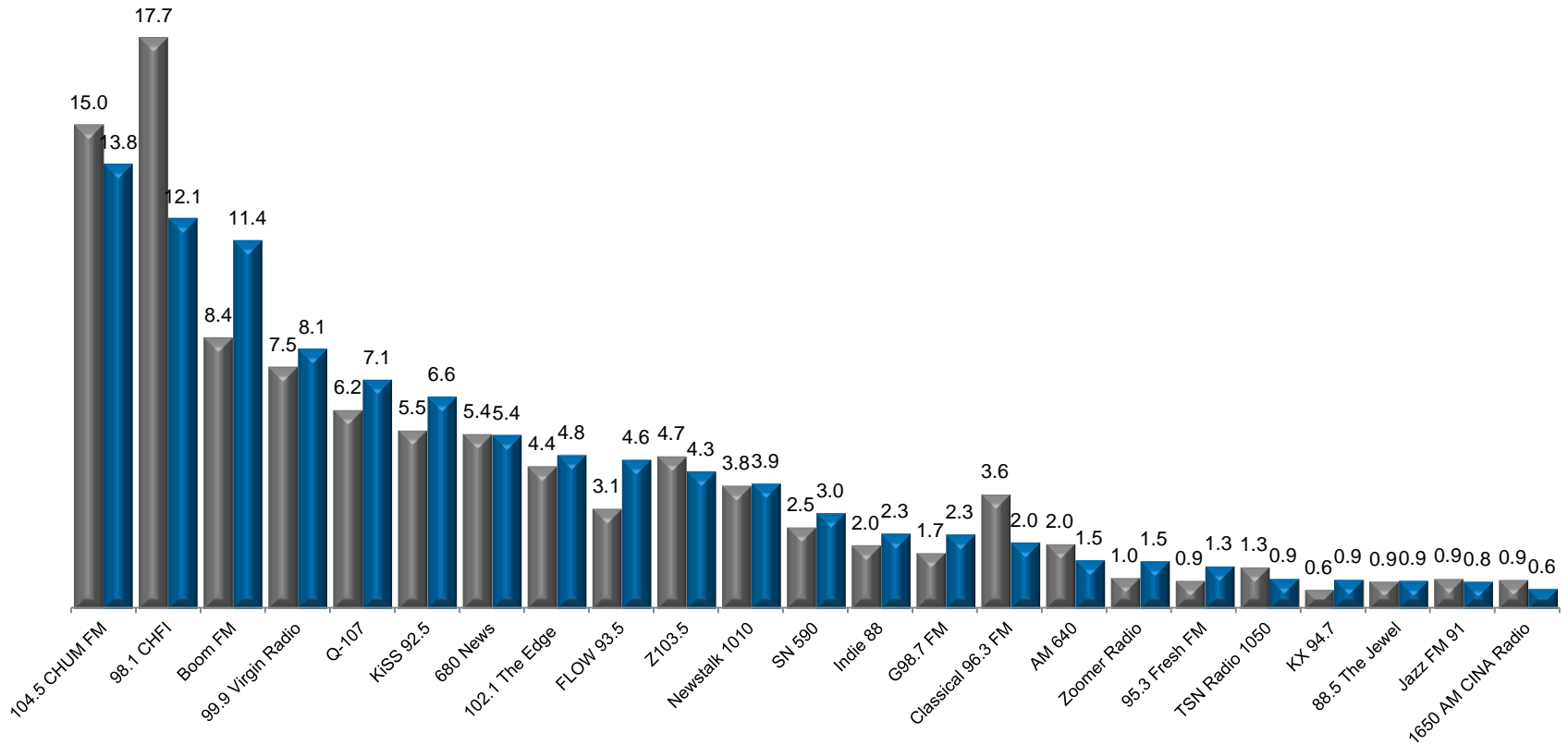
BellMedia

Bell Media Radio- Research
Source: BBM Infosys+, March 2 - May 31, 2015, Toronto Ctrl, Mo-Su, 2a-2a, A2+

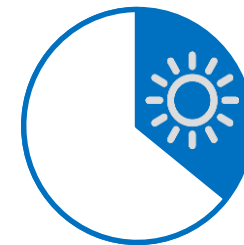
CONFIDENTIAL

Commercial Share (%) A18-54

■ Winter 14/15 (Dec 1, 2014-March 1, 2015) ■ Spring 2015 (March 2 - May 31, 2015)

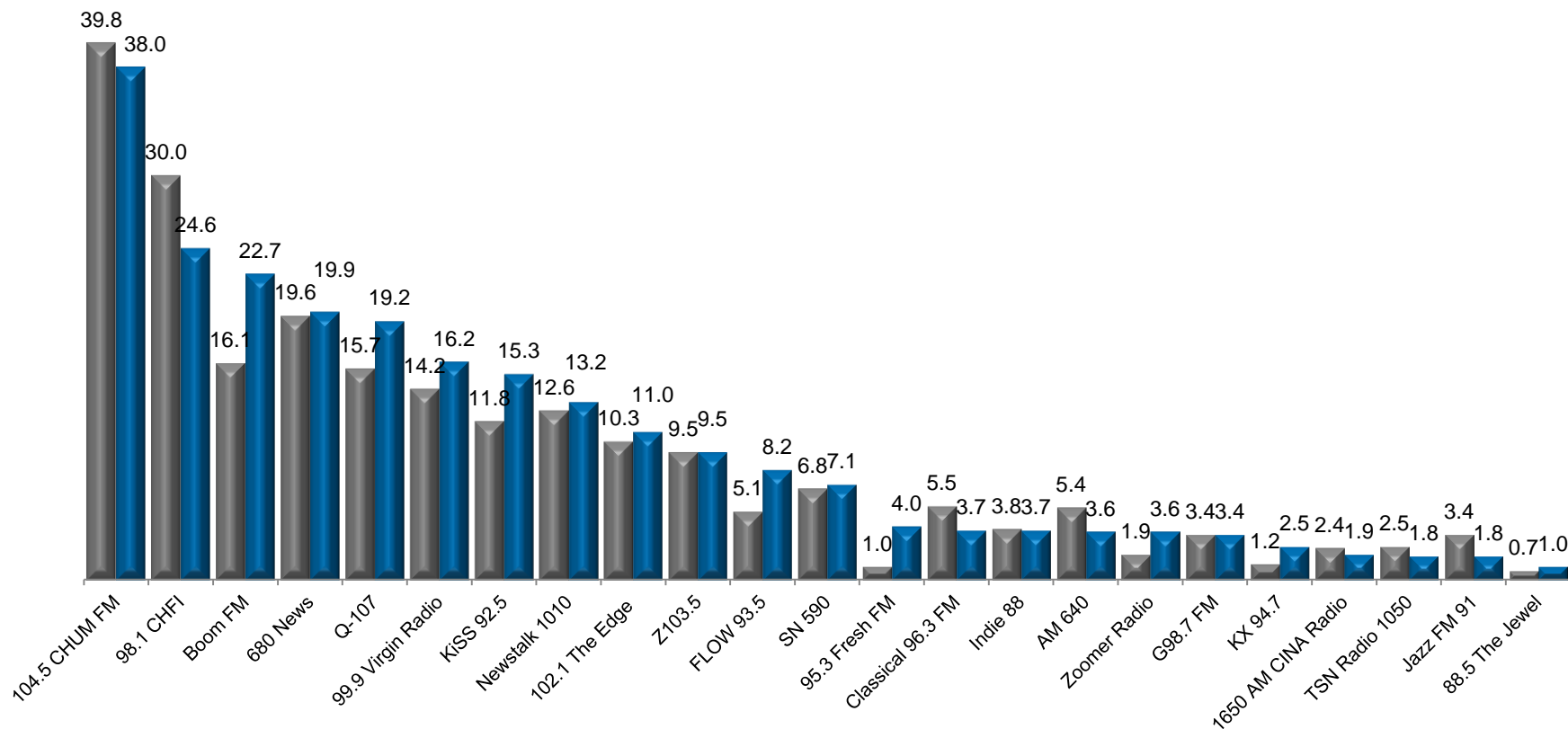


BREAKFAST timeblock's AMA(000) Adults 18-54



■ Winter 14/15 (Dec 1, 2014-March 1, 2015)

■ Spring 2015 (March 2 - May 31, 2015)

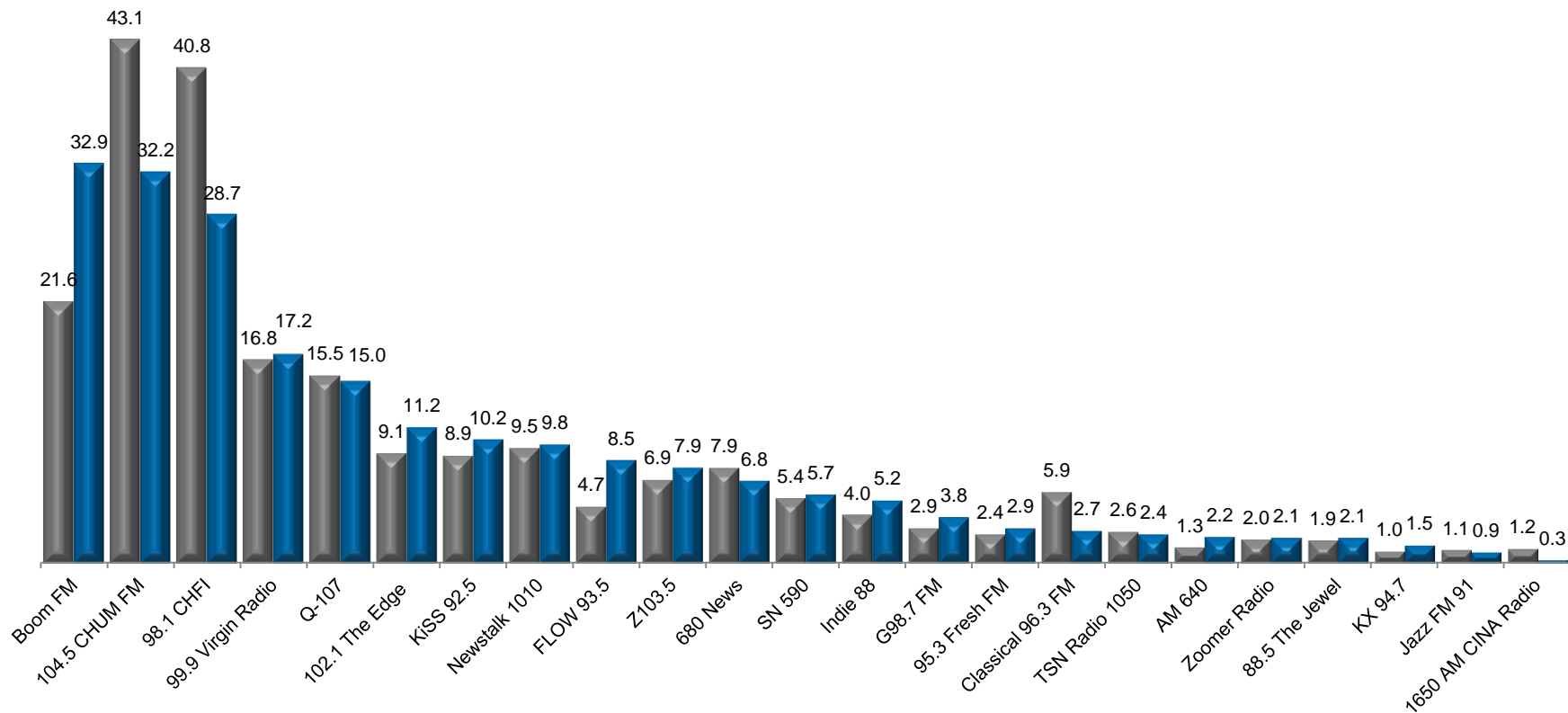


DAY timeblock's AMA(000) Adults 18-54

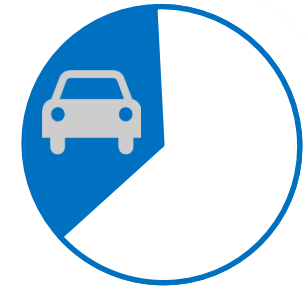


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■ Spring 2015 (March 2 - May 31, 2015)

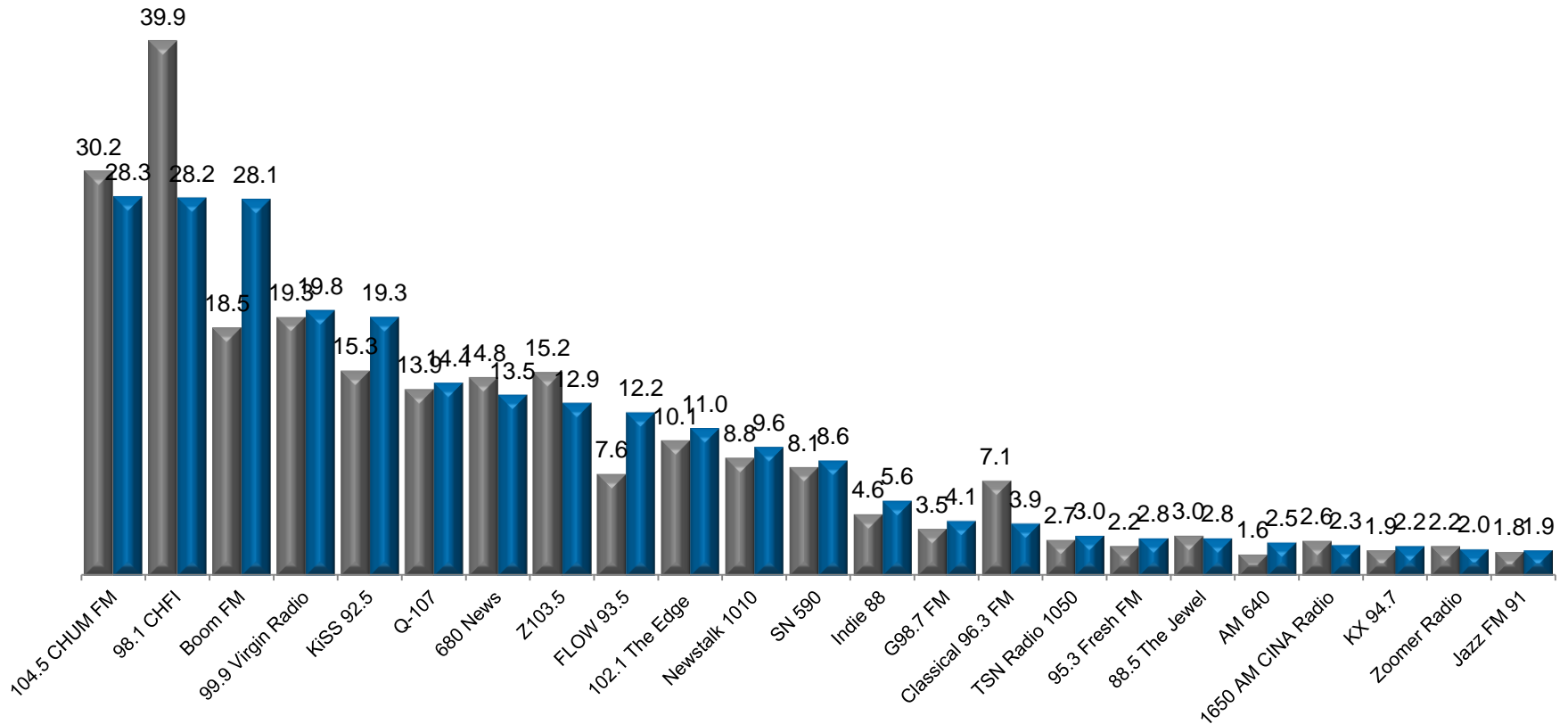


DRIVE timeblock's AMA(000) Adults 18-54

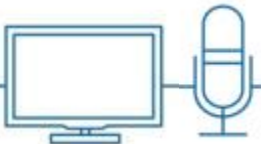


■ Winter 14/15 (Dec 1, 2014-March 1, 2015)

■ Spring 2015 (March 2 - May 31, 2015)



EDMONTON



EDMONTON – REACH AND HOURS/WK.

REACH



95%

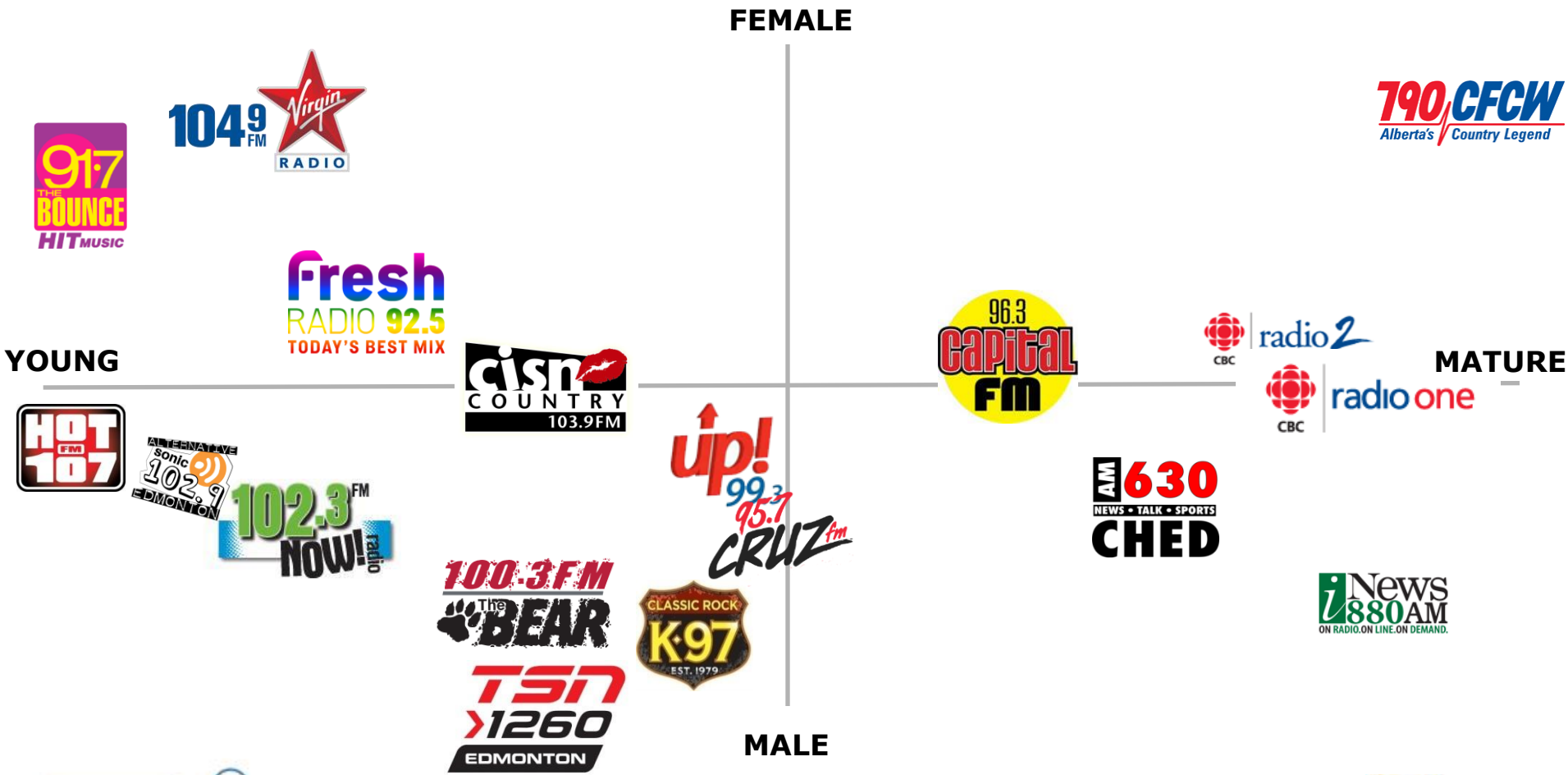
HOURS/WK.



10.1h



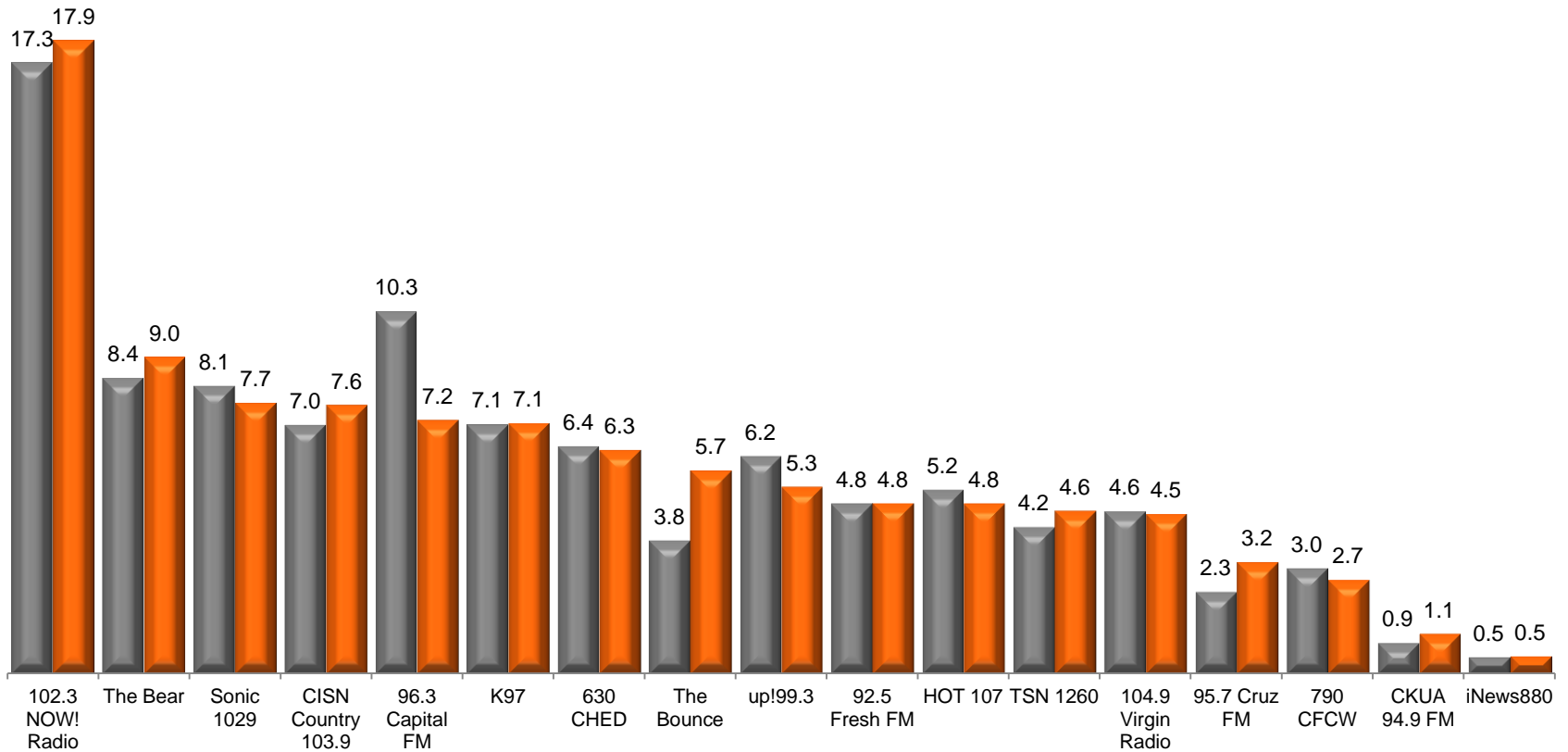
EDMONTON LANDSCAPE



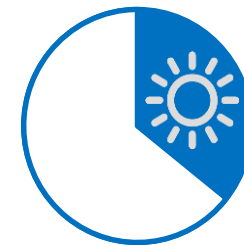
BellMedia

Commercial Share (%) A18-54

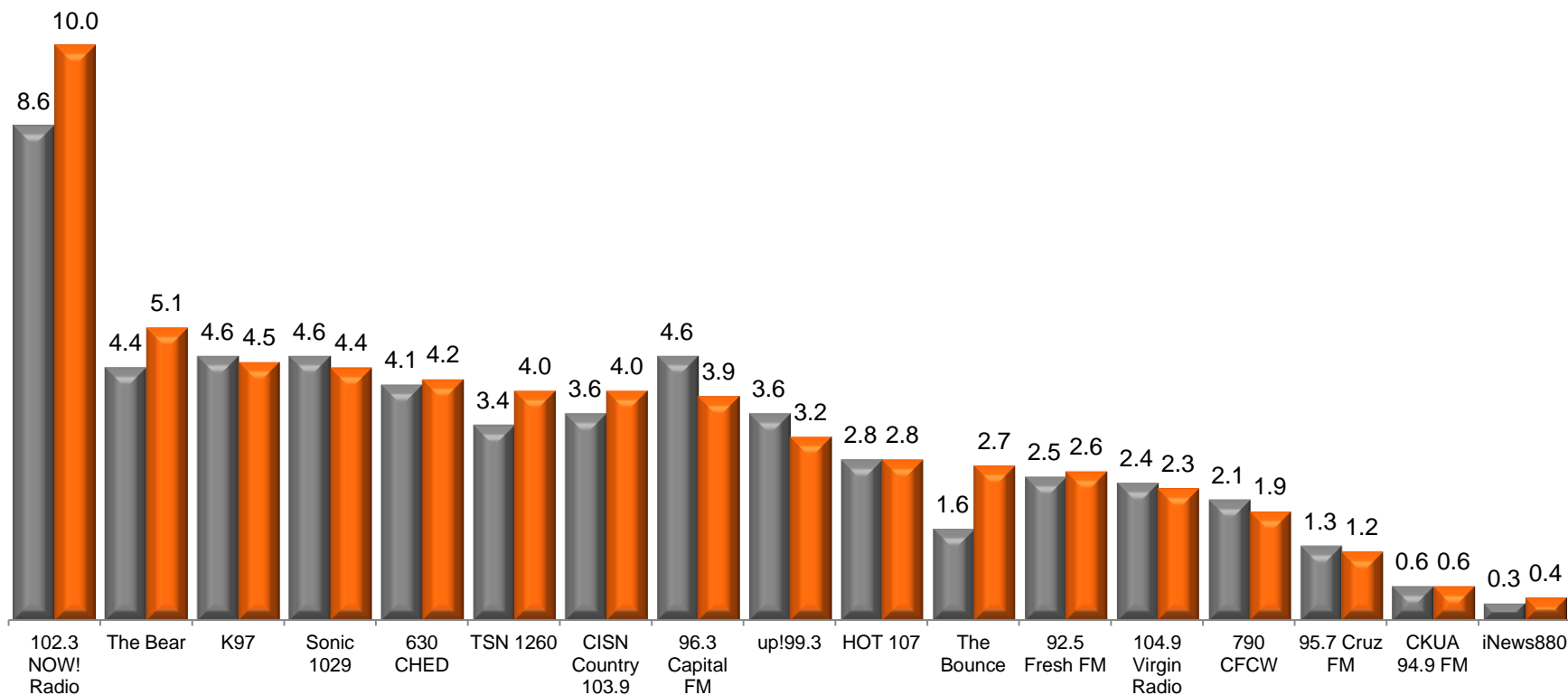
■ Winter 14/15 (Dec 1, 2014-March 1, 2015) ■ Spring 2015 (March 2 - May 31, 2015)



BREAKFAST timeblock's AMA(000) Adults 18-54



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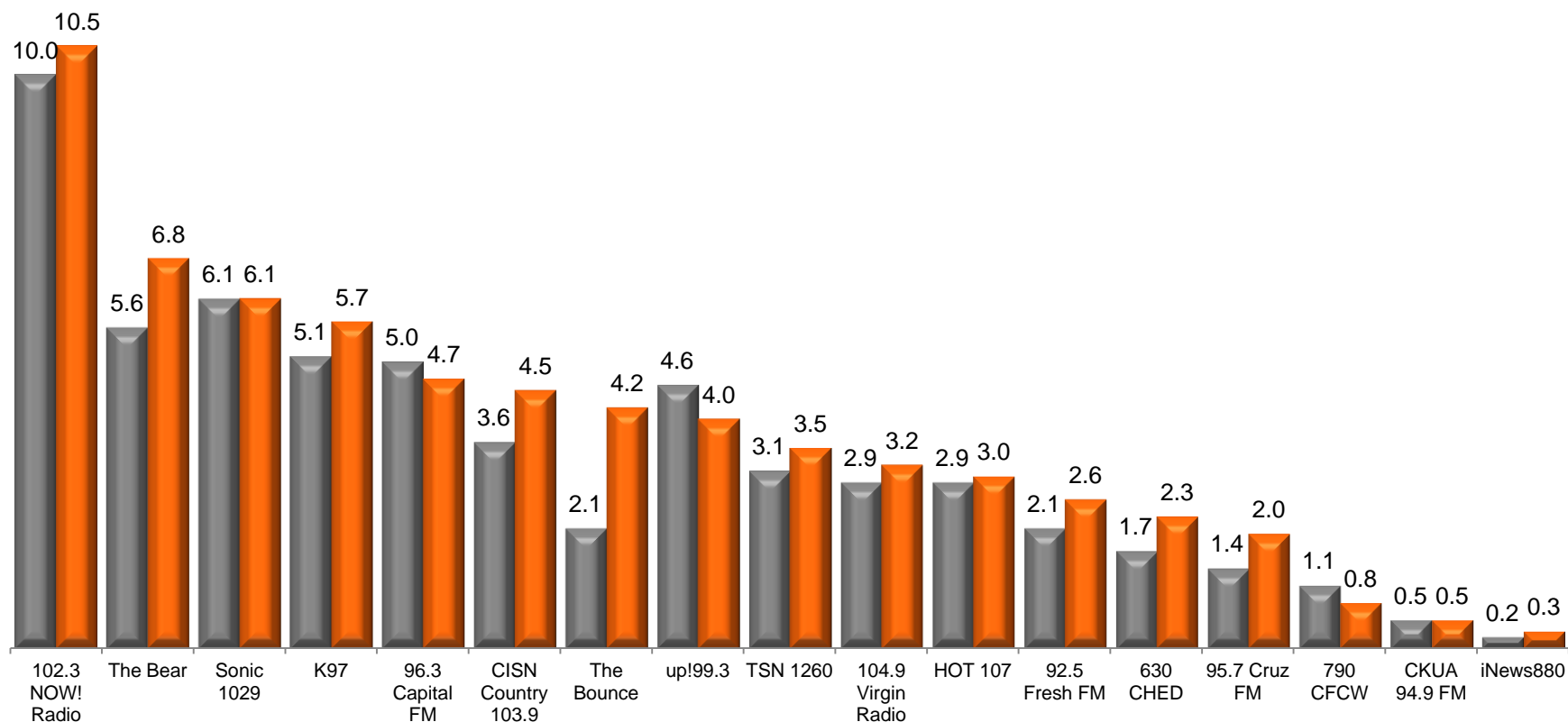
BellMedia

DAY timeblock's AMA(000) Adults 18-54

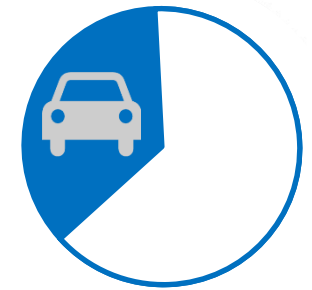


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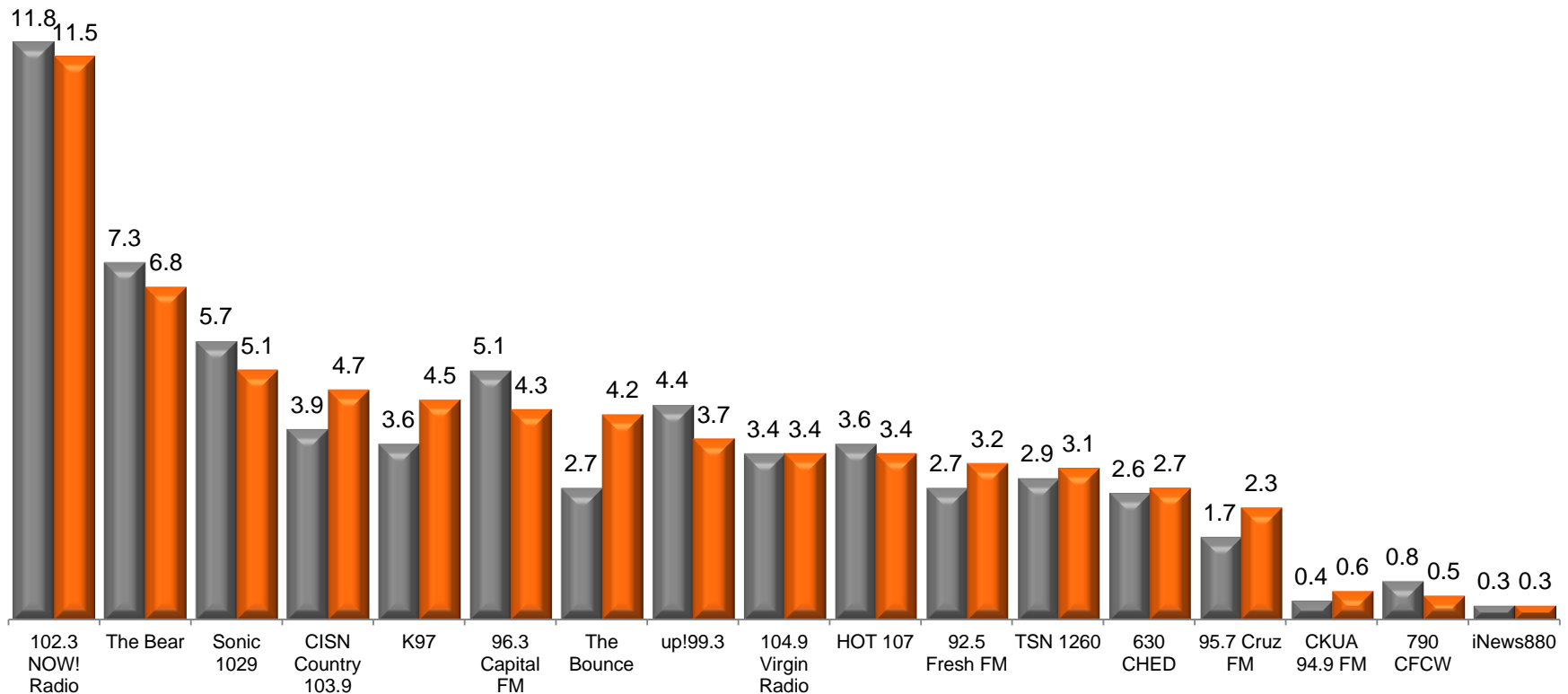


DRIVE timeblock's AMA(000) Adults 18-54

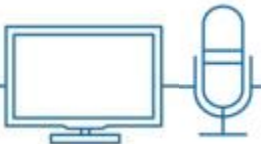


■ Winter 14/15 (Dec 1, 2014-March 1, 2015)

■ Spring 2015 (March 2 - May 31, 2015)



CALGARY



CALGARY – REACH AND HOURS/WK.

REACH



95%

HOURS/WK.



9.4h



CALGARY LANDSCAPE

FEMALE



MATURE



MALE



BellMedia

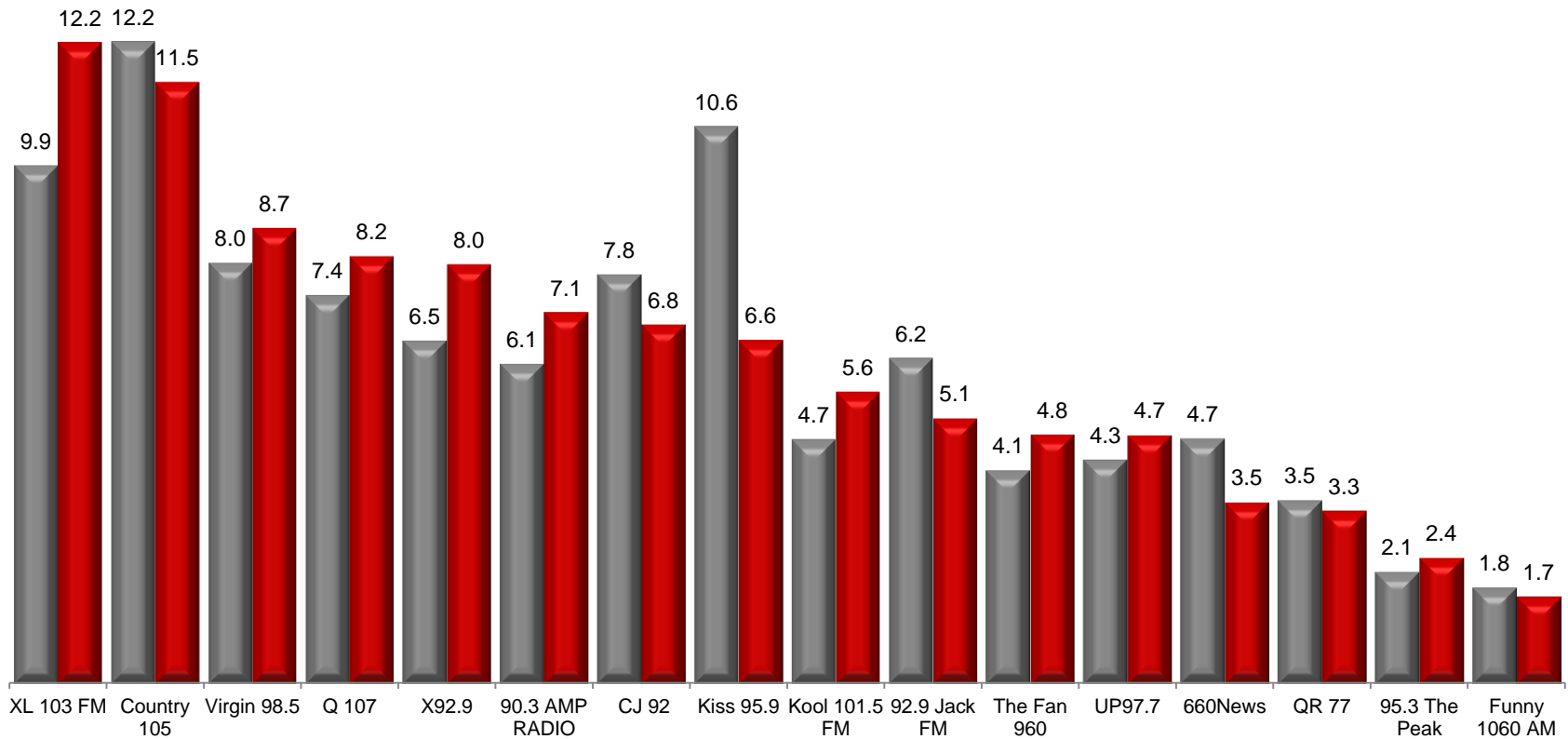
Bell Media Radio- Research

Source: BBM Infosys+, March 2 - May 31, 2015, Calgary Ctrl Mo-Su 2a-2a, A2+

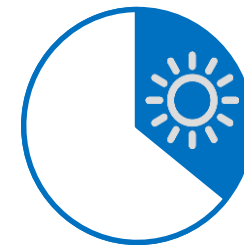
CONFIDENTIAL

Commercial Share (%) A18-54

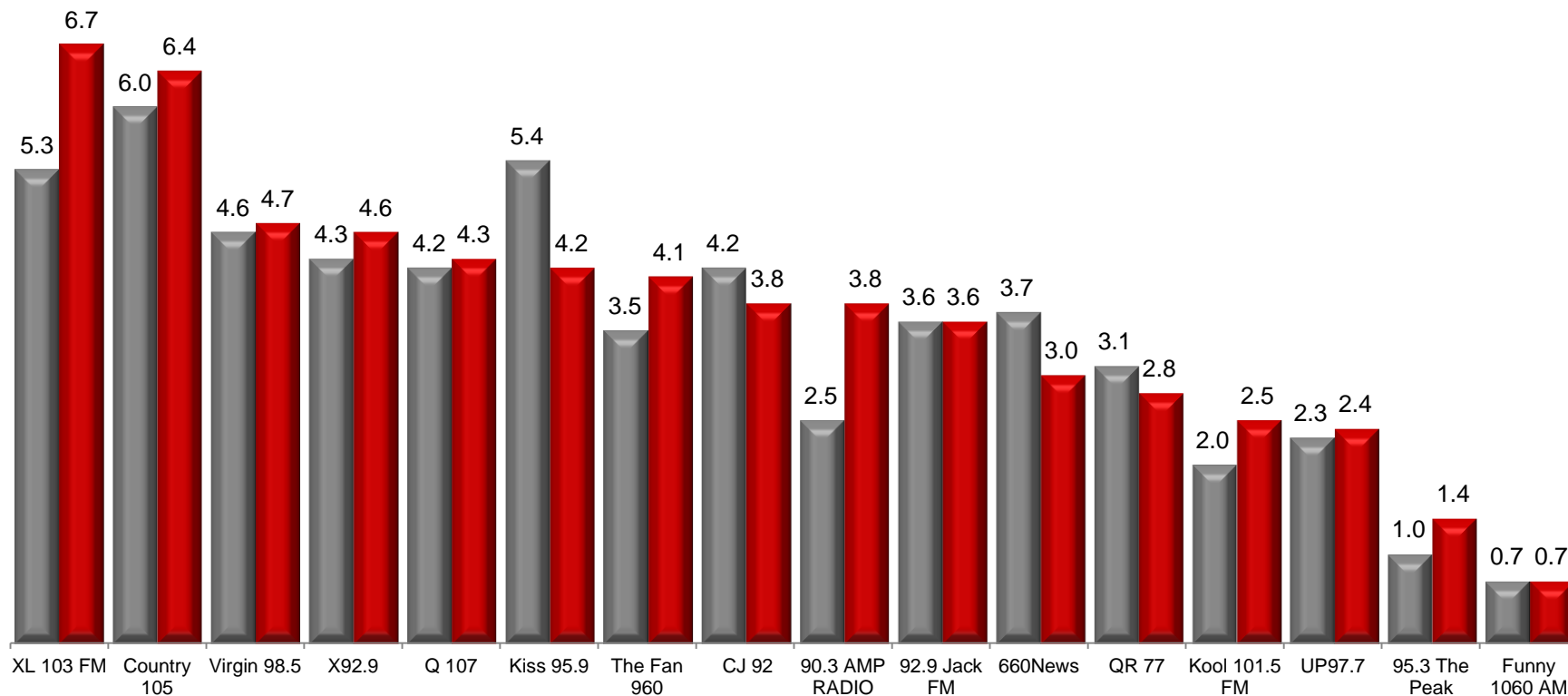
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BREAKFAST timeblock's AMA(000) Adults 18-54



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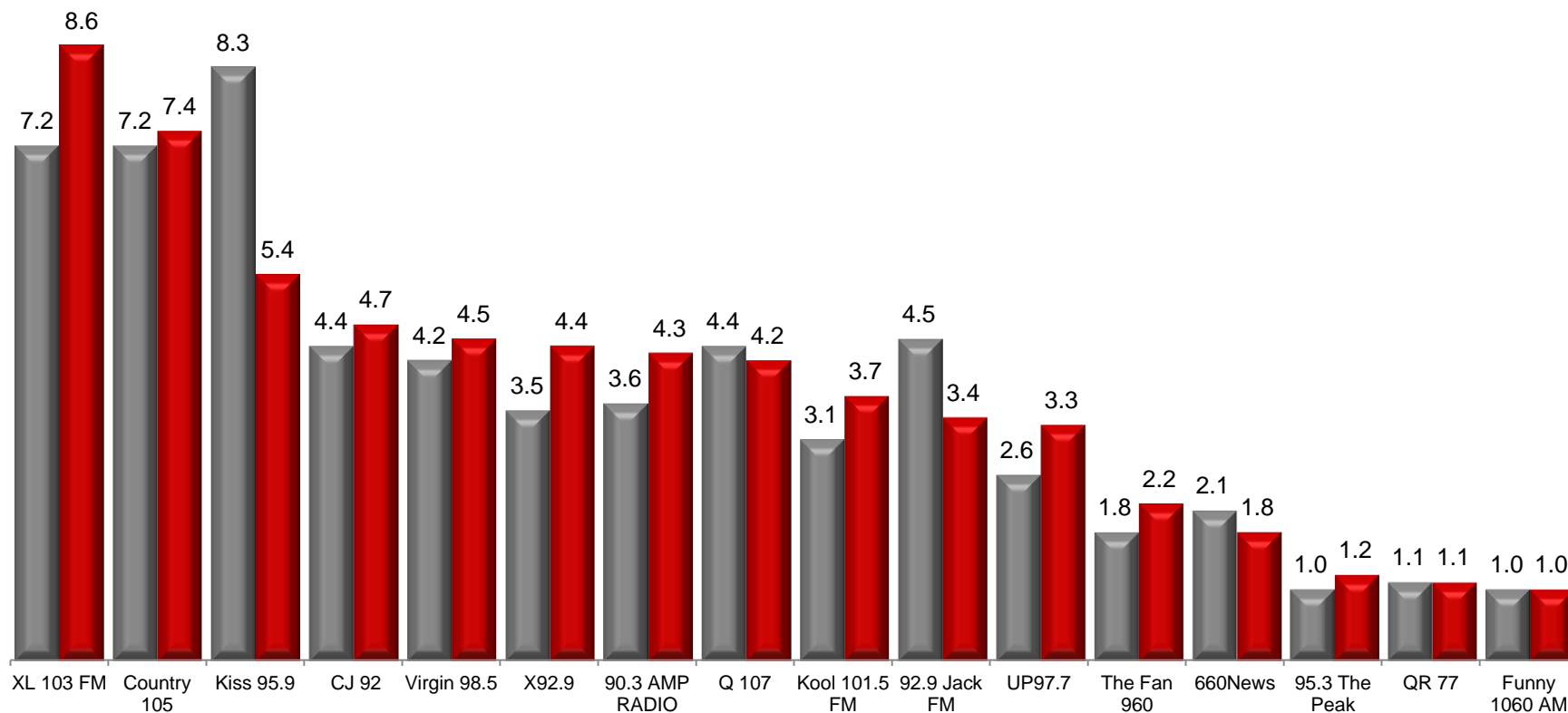


BellMedia

DAY timeblock's AMA(000) Adults 18-54

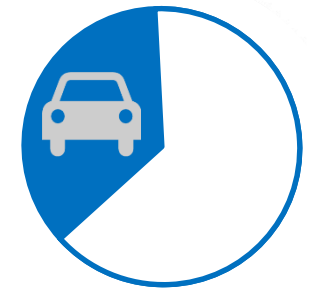


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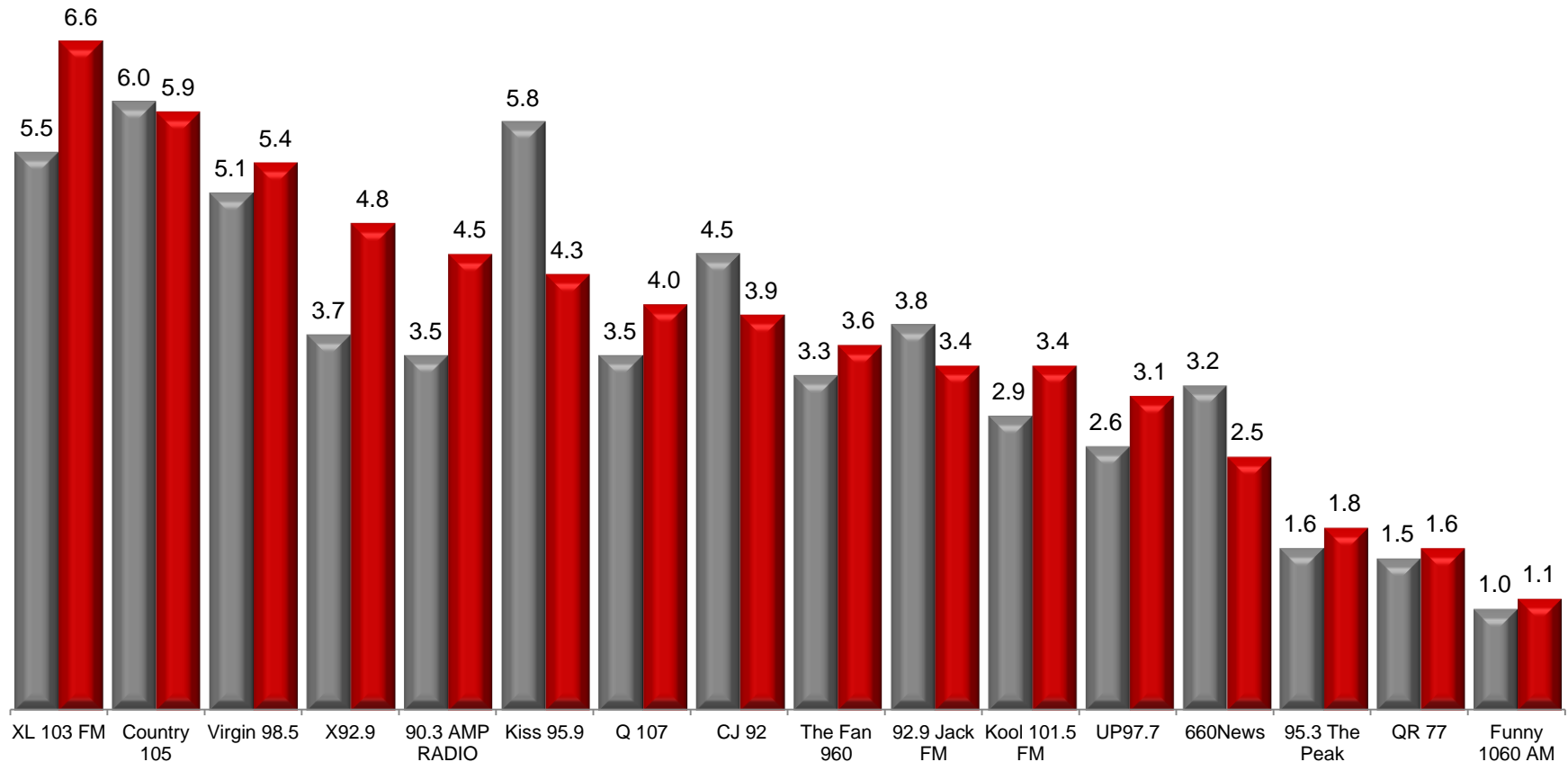


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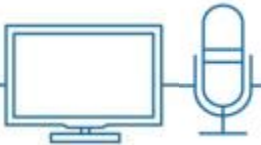
DRIVE timeblock's AMA(000) Adults 18-54



■ Winter 14/15 (Dec 1, 2014-March 1, 2015) ■ Spring 2015 (March 2 - May 31, 2015)



MONTREAL



MONTREAL – REACH AND HOURS/WK.

REACH



96%

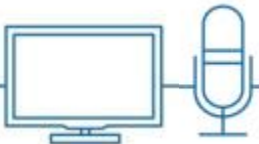
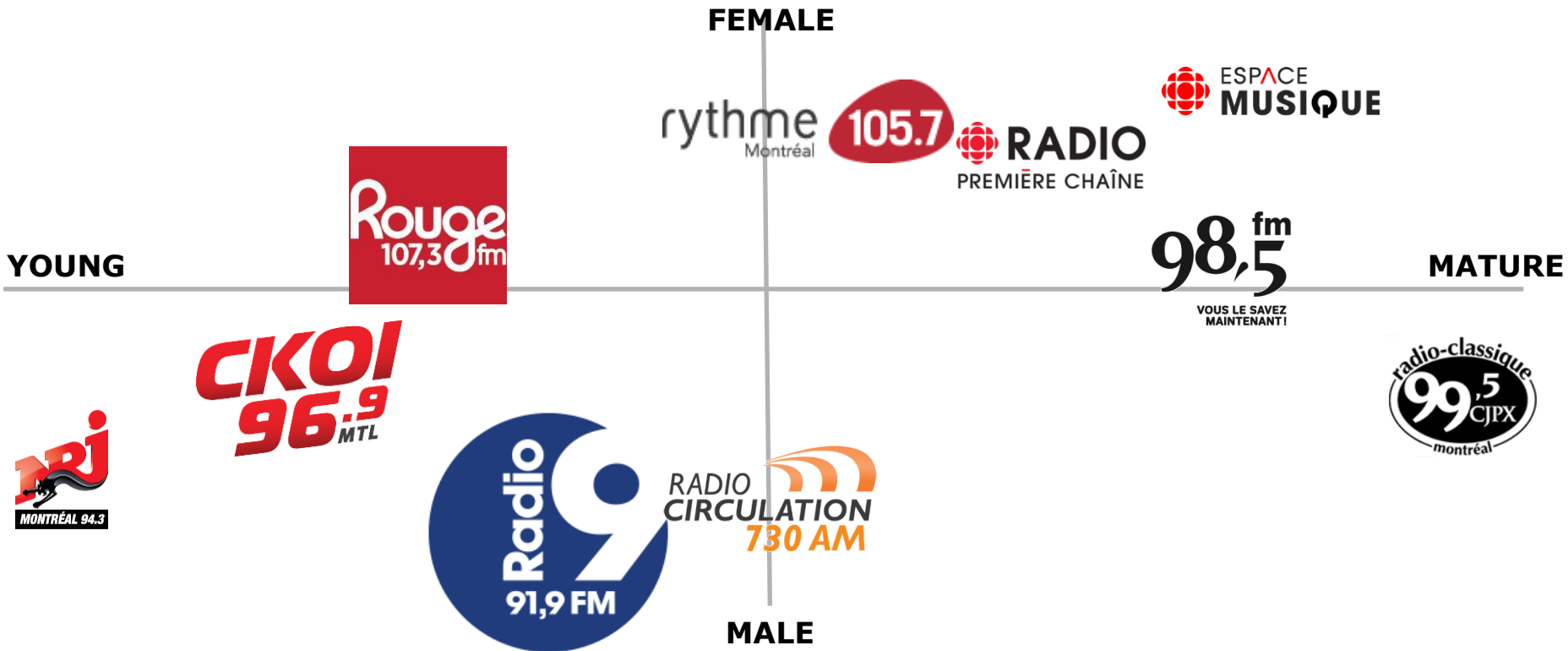
HOURS/WK.



10.8h

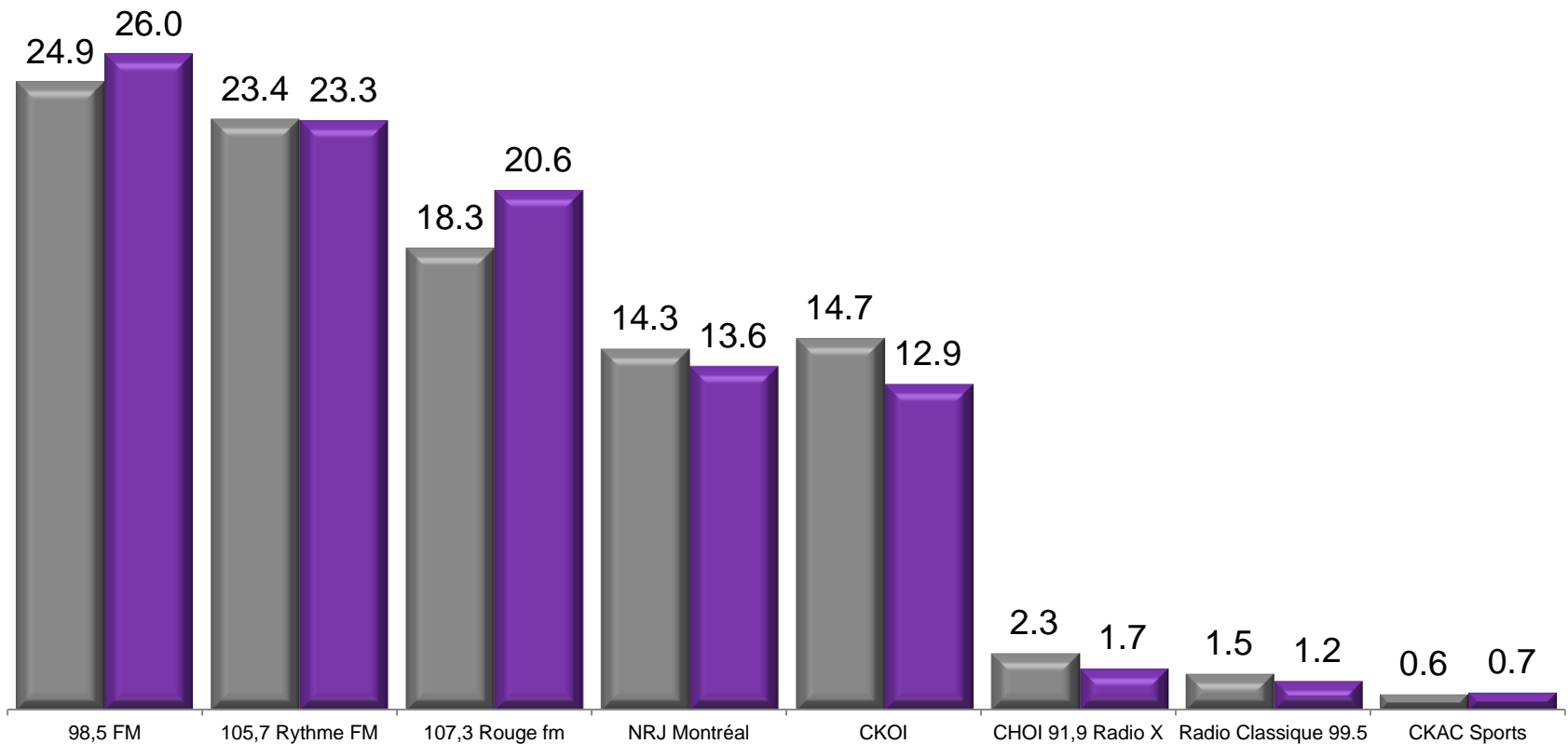


MONTREAL FRANCO LANDSCAPE

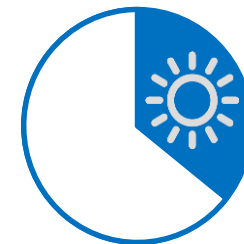


Commercial Share (%) A18-54

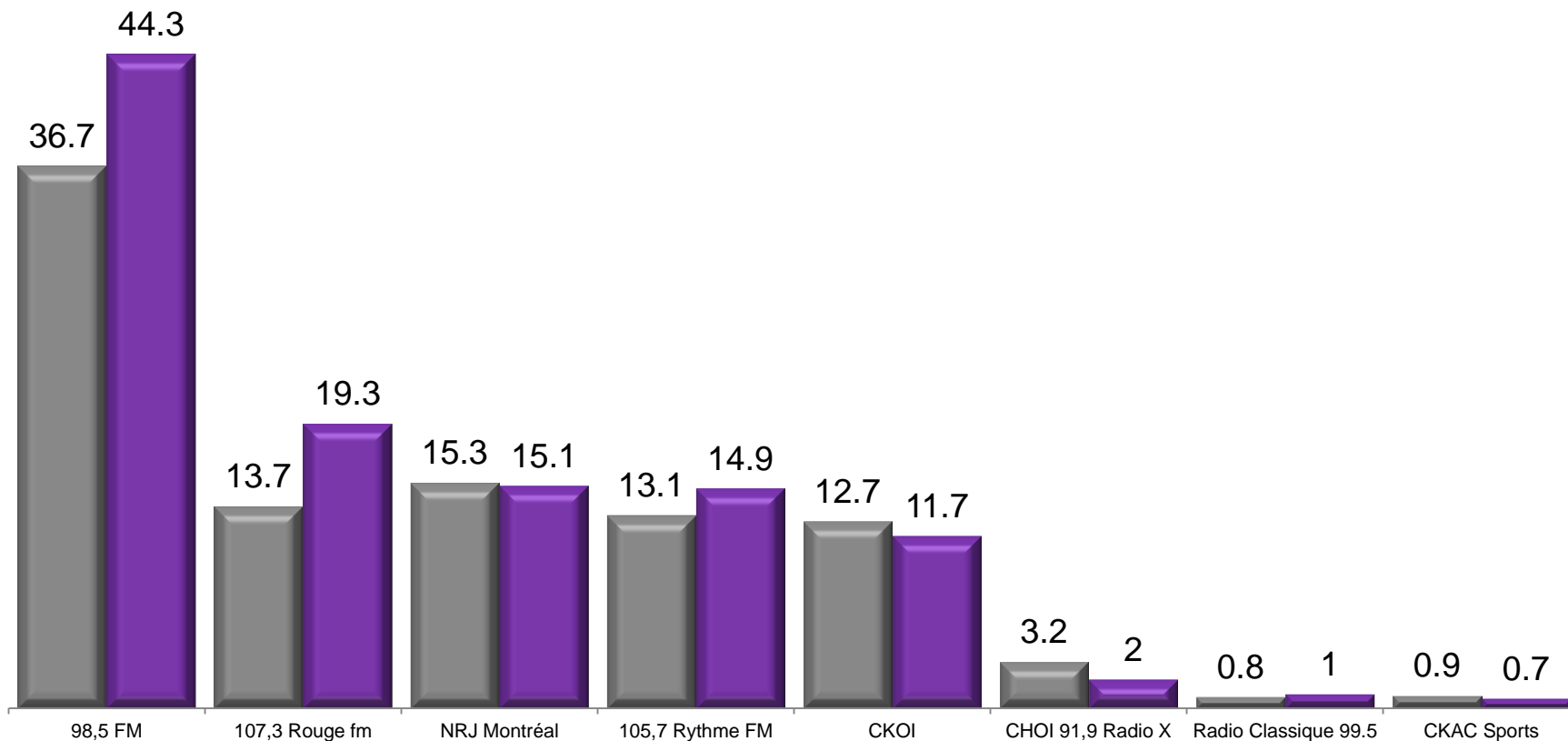
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BREAKFAST timeblock's AMA(000) Adults 18-54



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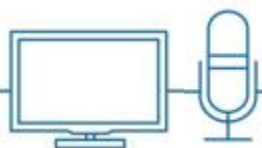
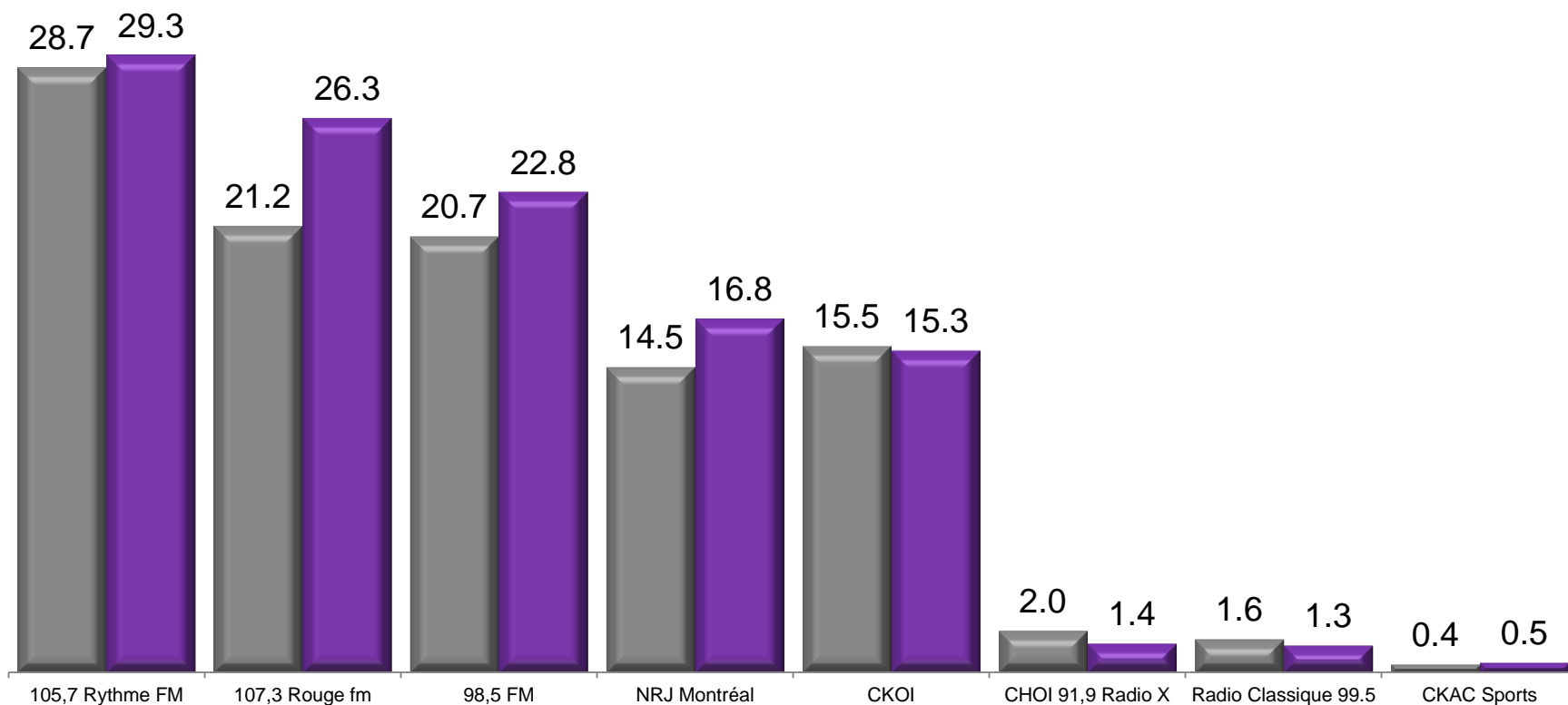
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DAY timeblock's AMA(000) Adults 18-54



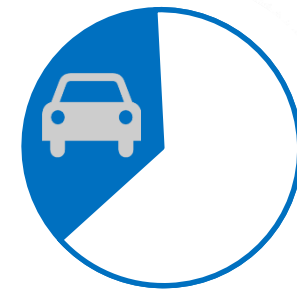
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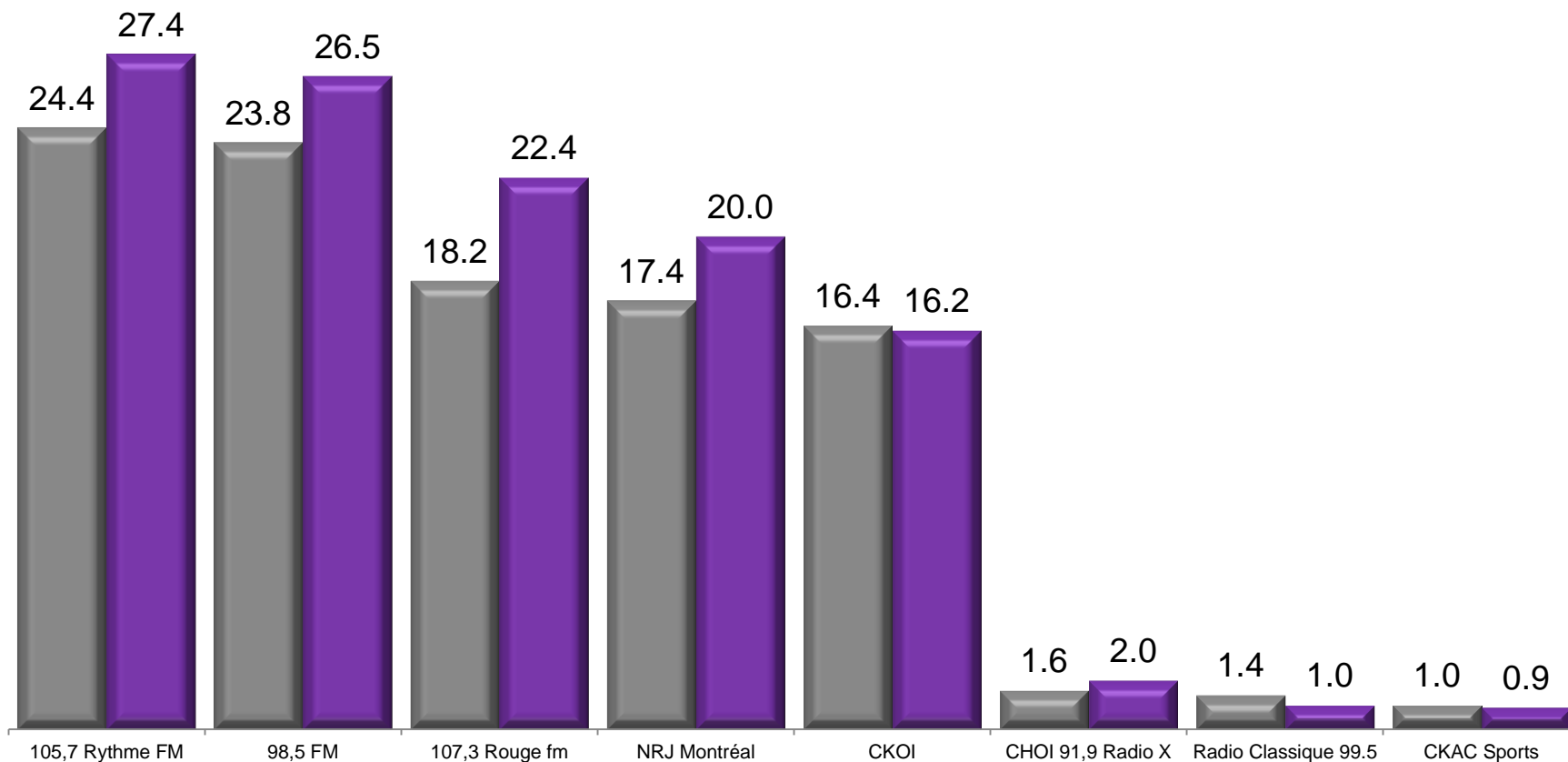


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DRIVE timeblock's AMA(000) Adults 18-54

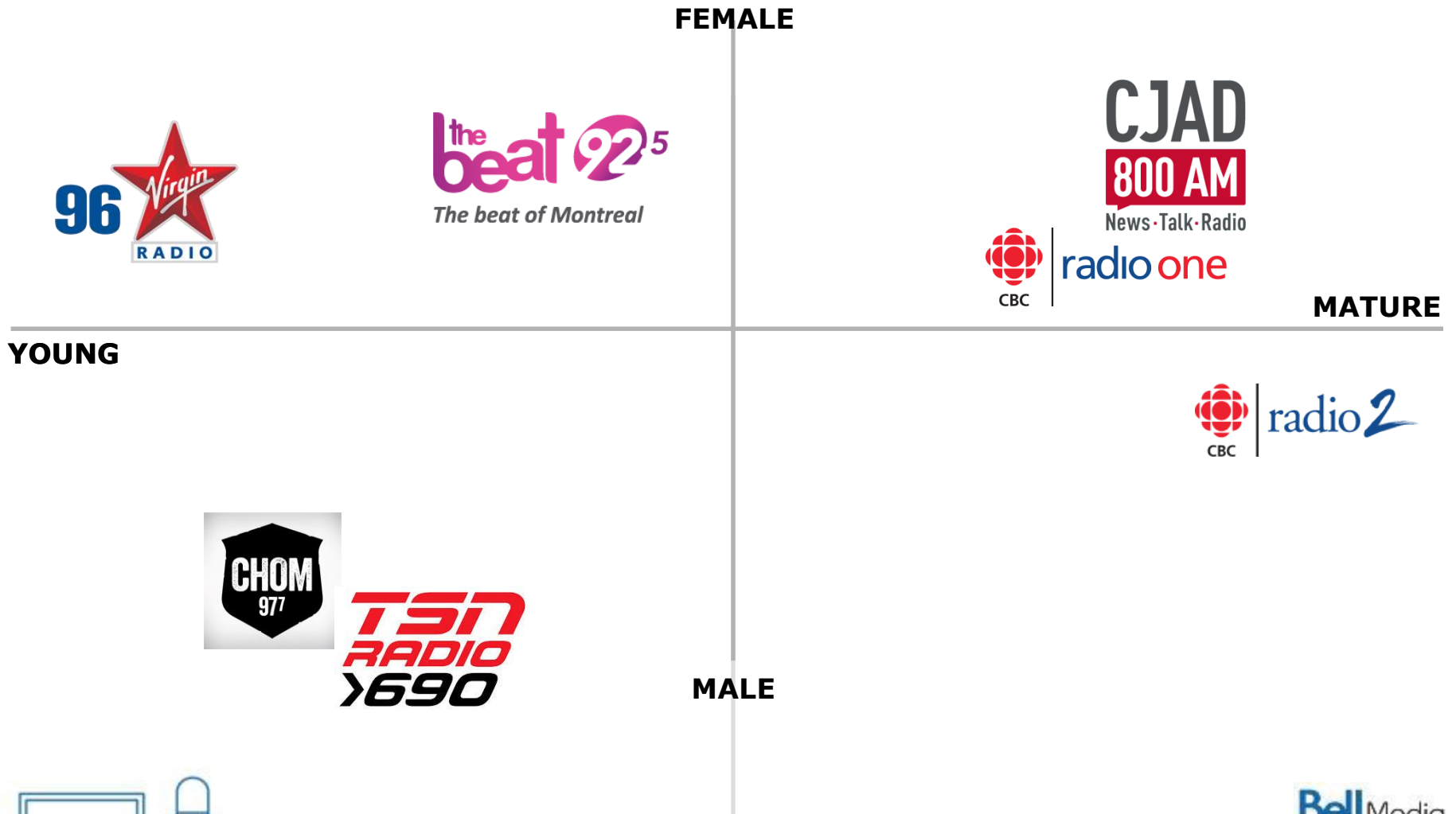


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BellMedia

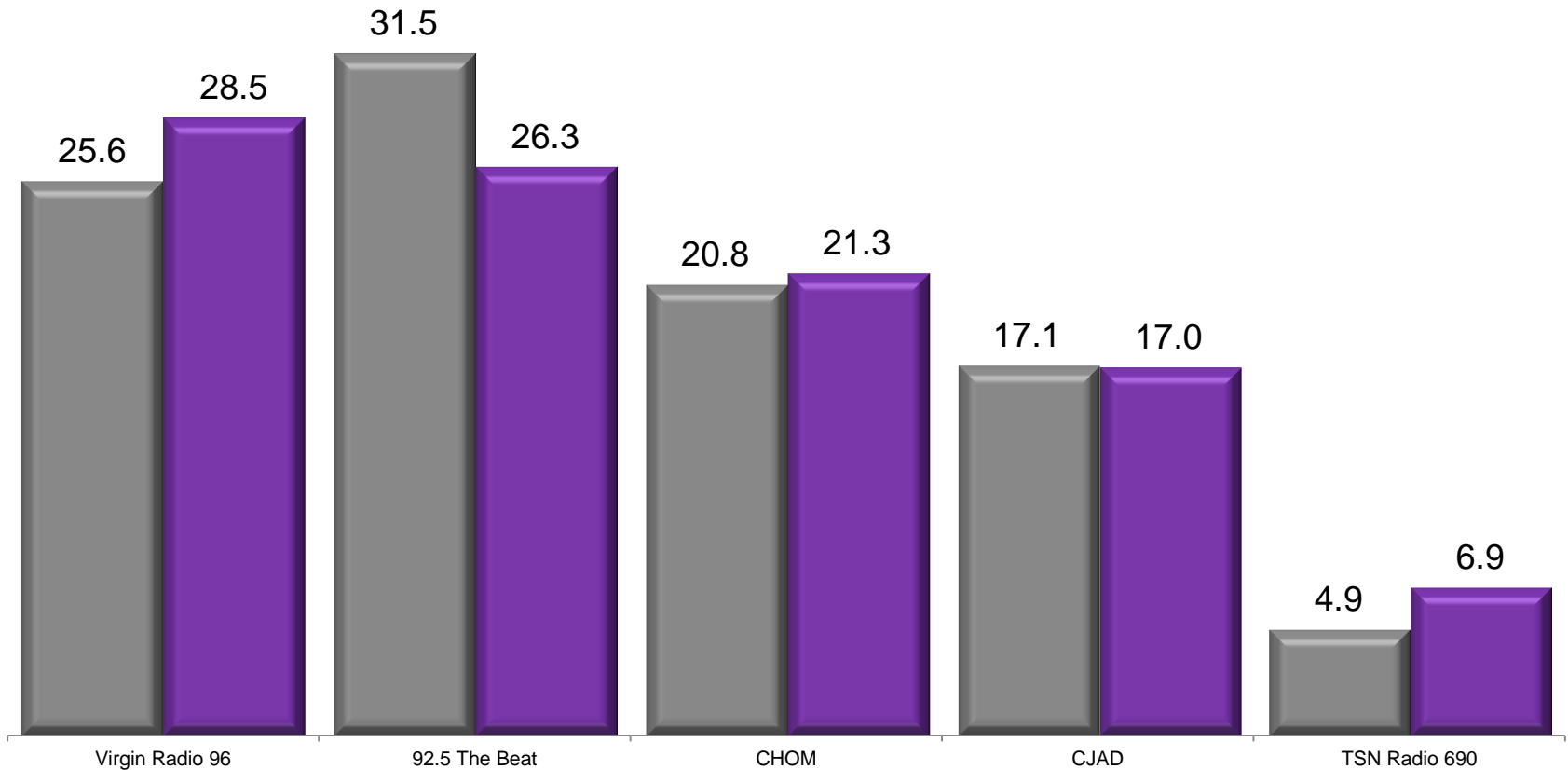
MONTREAL ANGLO LANDSCAPE



BellMedia

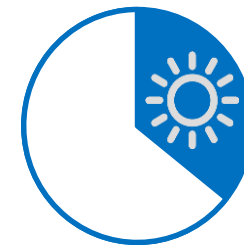
Commercial Share (%) A18-54

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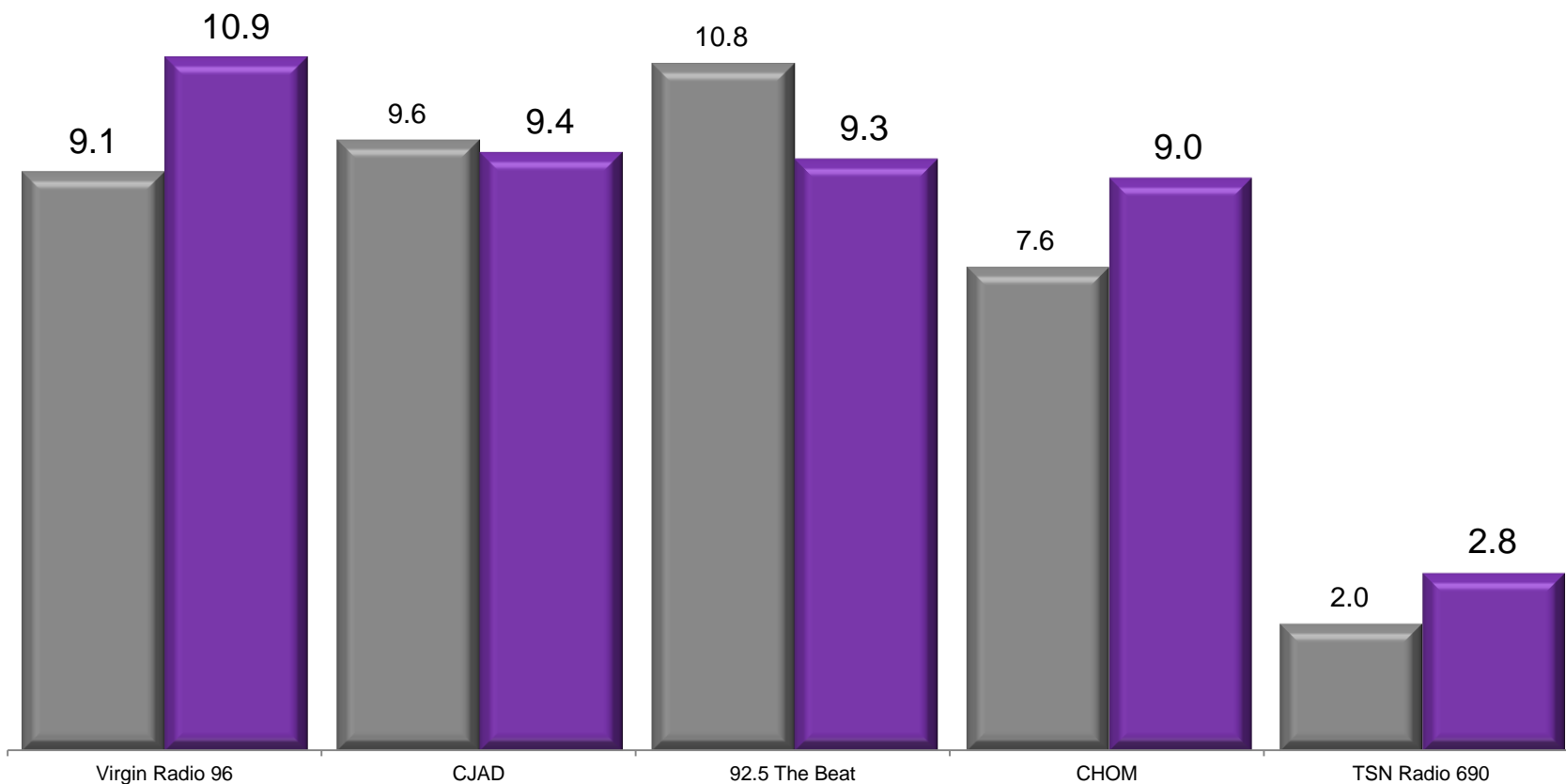


BellMedia

BREAKFAST timeblock's AMA(000) Adults 18-54



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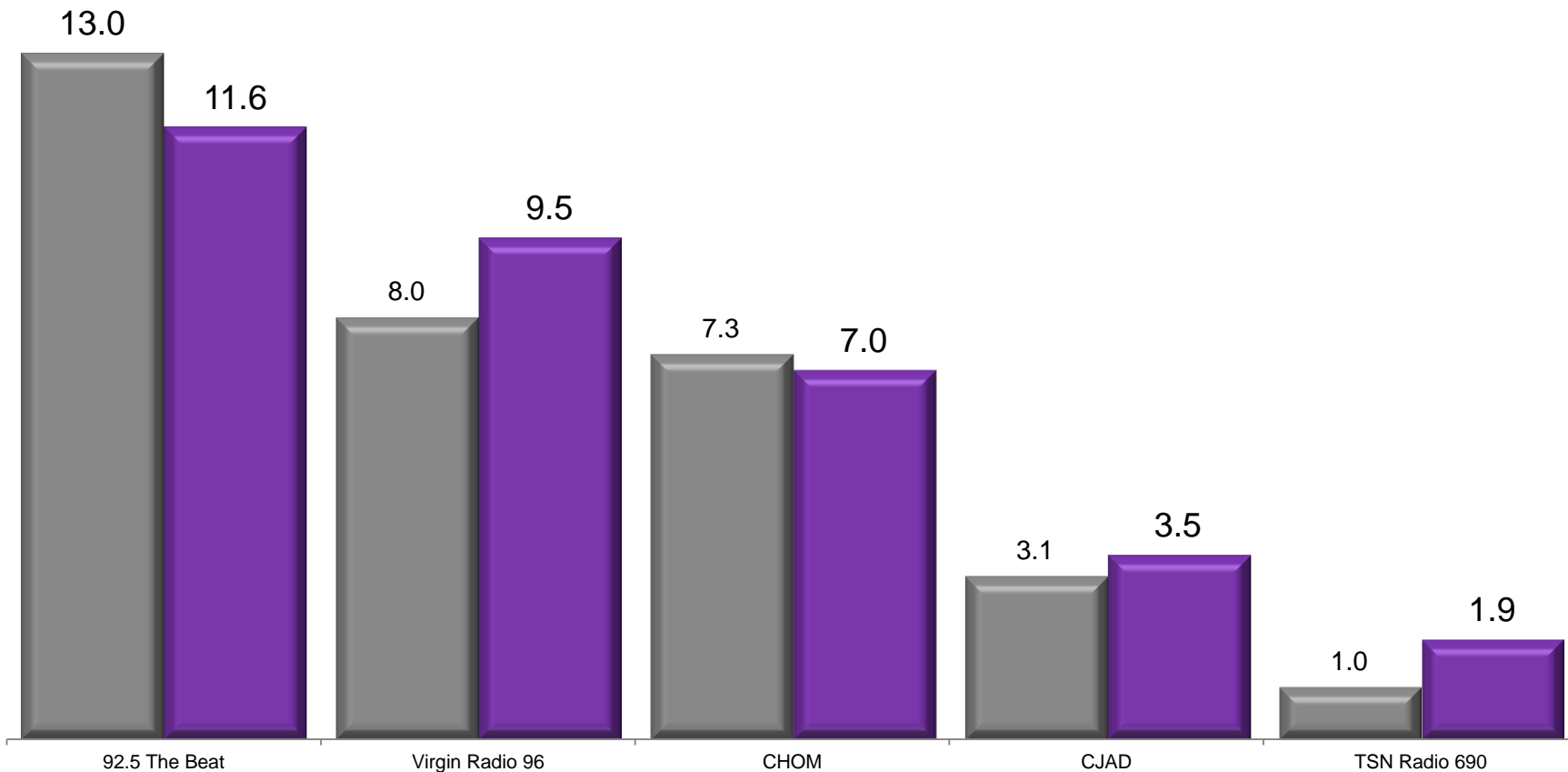


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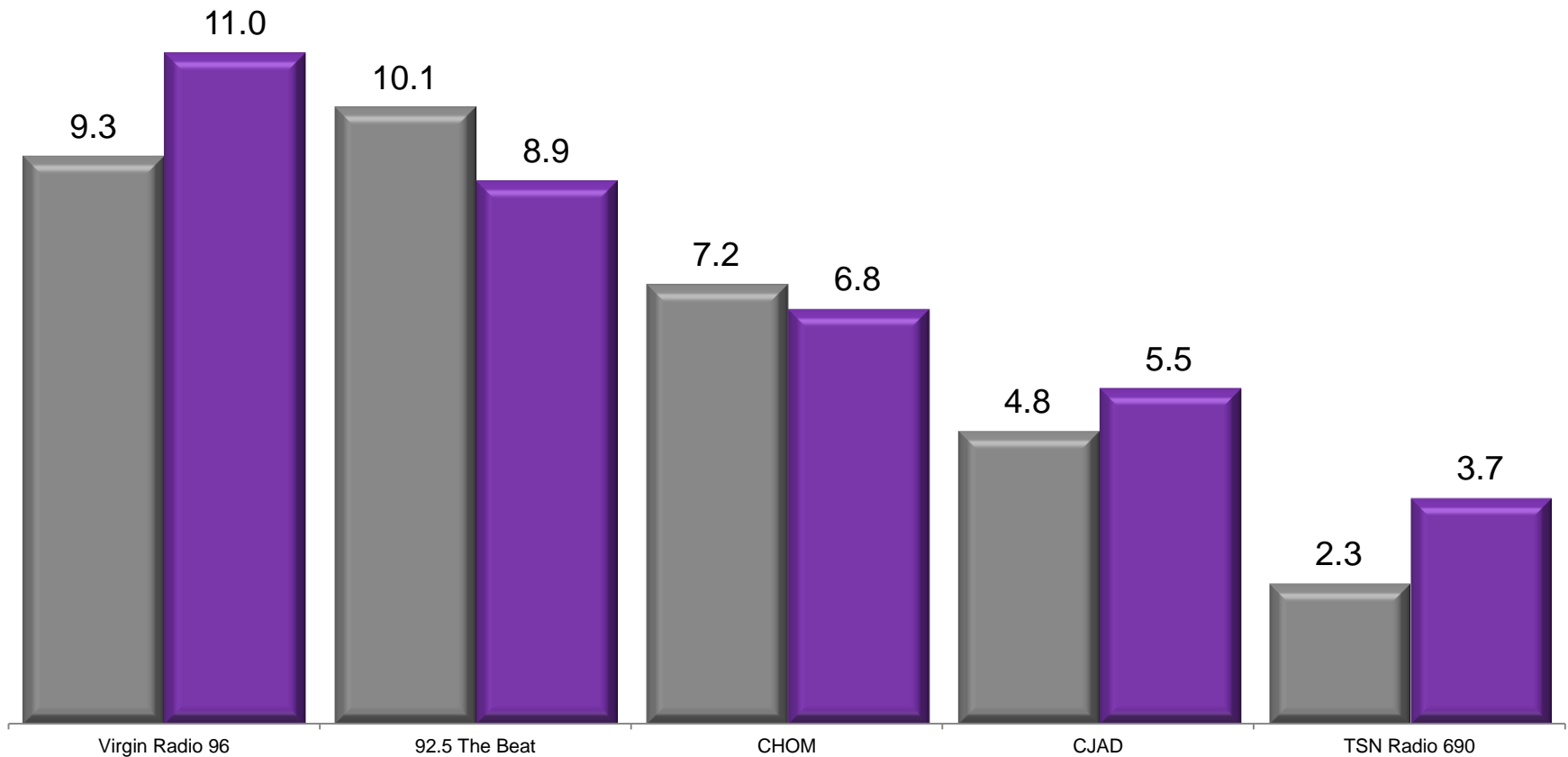


BellMedia

DRIVE timeblock's AMA(000) Adults 18-54



■ Winter 14/15 (Dec 1, 2014-March 1, 2015) ■ Spring 2015 (March 2 - May 31, 2015)



BellMedia

Additional Sourcing

From the material covered during the LIVE PPM Webinar Show

- Grey's Anatomy & How To Get Away with Murder Comparison:
 - Live, PVR, STB VOD Source: Numeris (BBM Canada), Total Canada, CTV Total, P2+, PPM final data, Live+28 data, NLM Report. CTV.ca and CTV GO: Omniture, Calculations based on Video Viewing Time and Content Duration. CTV.ca based on CTV iOS and CTV Android (Tablet & Phone).
- TV Daily Loyalty (%) Market Comparison:
 - SOURCE: Numeris (BBM Canada), PPM Markets, Local Conventional Stations, 2014 Calendar Year, Regularly-scheduled programs only. Note: Fantasy includes all superhero, super-natural, and everyday superhero's (i.e. Scorpion is included in this format).
- Top Formats by Market Radio Comparison:
 - SOURCE: Numeris PPM Infosys Data: Jan 1-Dec31, 2014; Mo-Su 2a-2a; Based on format clusters in PPM Tor/Van/Edm/Cal; Top formats by Weekly TSL; Various demos.

