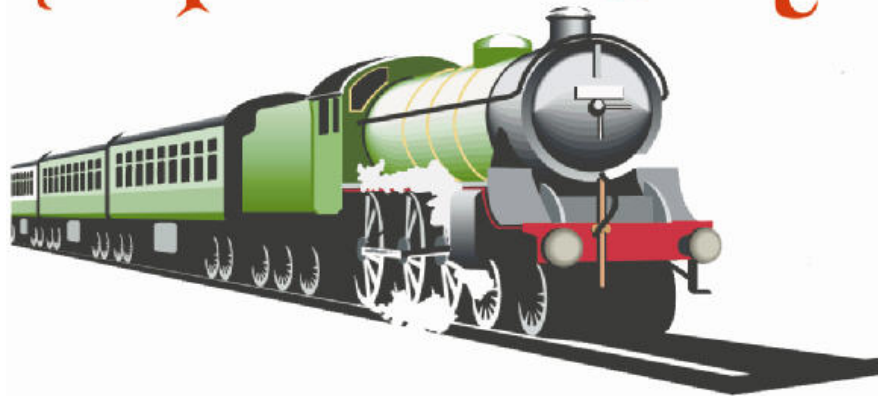


Community Newspaper Readership

The
Pipestone Flyer



ComBase
COMMUNITY NEWSPAPERS – DEFINITELY

Pipestone Flyer Newspaper Readership

- What is ComBase?
- Study Overview
- Readership Overview
- Demographics
- How Much of the Paper is Read
- Number of Issues Read
- Newspaper Ratings
- Preferred Community Newspaper
- Media Habits – Newspaper, Radio
- Cross Readership
- Pipestone Flyer Strengths

What is ComBase?

The Most Comprehensive Print Study in the World!

ComBase = Community Newspaper Database

- Both the Research Bureau and the study
- Initiative of CCNA and its members
- Stand-alone incorporated company
- Governed by an independent, fully tri-partite Board
- Arms-length relationship to the industry
- Completely funded by 300+ member papers
- Support from independents & large groups
- Small & large papers across Canada
- 400+ markets and sub-markets
- 25,000+ interviews per wave
- 50,000+ total interviews
- 2-year rolling study
- All provinces represented
- 800+ publications – community & daily newspapers, ethnic, alternative, shoppers, and agricultural publications
- Title- and market-specific
- 900+ radio stations
- Demographics and readership

Study Overview

Source: ComBase 2006 One Year Study

Base: Pipestone Flyer Distribution Area *

Demo: Adults 18+

Weighted Population: 19,600

ComBase 2006 interviews were conducted from March to July 2006. ComBase 2006 is conducted by Millward Brown and Standard Research Systems.

*includes counties of Wetaskiwin and Leduc - referred to as Wetaskiwin/Leduc

Community Newspapers Dominate!

(Wetaskiwin/Leduc, AB)

- Readership of community newspapers in the counties of Wetaskiwin and Leduc is much higher than readership of daily newspapers
- **67%** of adults report reading ANY community newspaper
- **25%** of adults report reading ANY daily newspaper
- And **50%** report reading ONLY community newspapers and NOT a daily newspaper

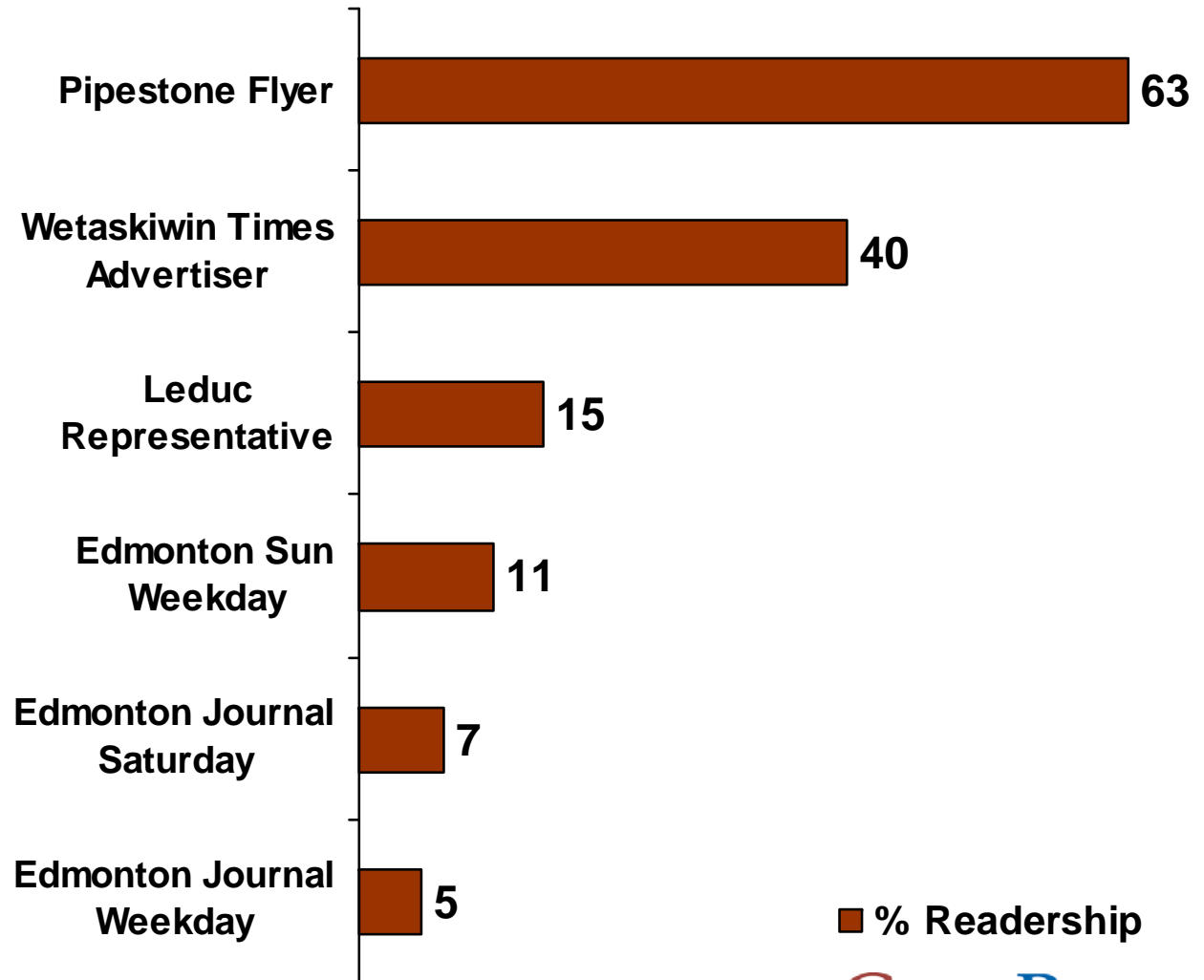


Source: ComBase 2006 One Year Study
*Base Population – Pipestone Flyer Distribution Area (19,600)

Newspaper Readership Overview

(Wetaskiwin/Leduc, AB)

- Readership of **The Pipestone Flyer** is **63%**
- Readership of **Wetaskiwin Times Advertiser** is **40%**
- Readership of **Leduc Representative** is **15%**
- Readership of **Edmonton Sun Weekday** is **11%**
- Readership of **Edmonton Journal Saturday** is **7%**
- Readership of **Edmonton Journal Weekday** is **5%**



Source: ComBase 2006 One Year Study
*Base Population – Pipestone Flyer Distribution Area (19,600)

Readership Overview

- **63%** of Wetaskiwin/Leduc adults report reading **The Pipestone Flyer** - this represents 12,300 readers
- **The Wetaskiwin Times Advertiser** reports **40%** readership, representing 7,900 adults
- **The Leduc Representative** has 2,900 readers (**15%** readership)

Source: ComBase 2006 One Year Study

*Base Population – Pipestone Flyer Distribution Area (19,600)

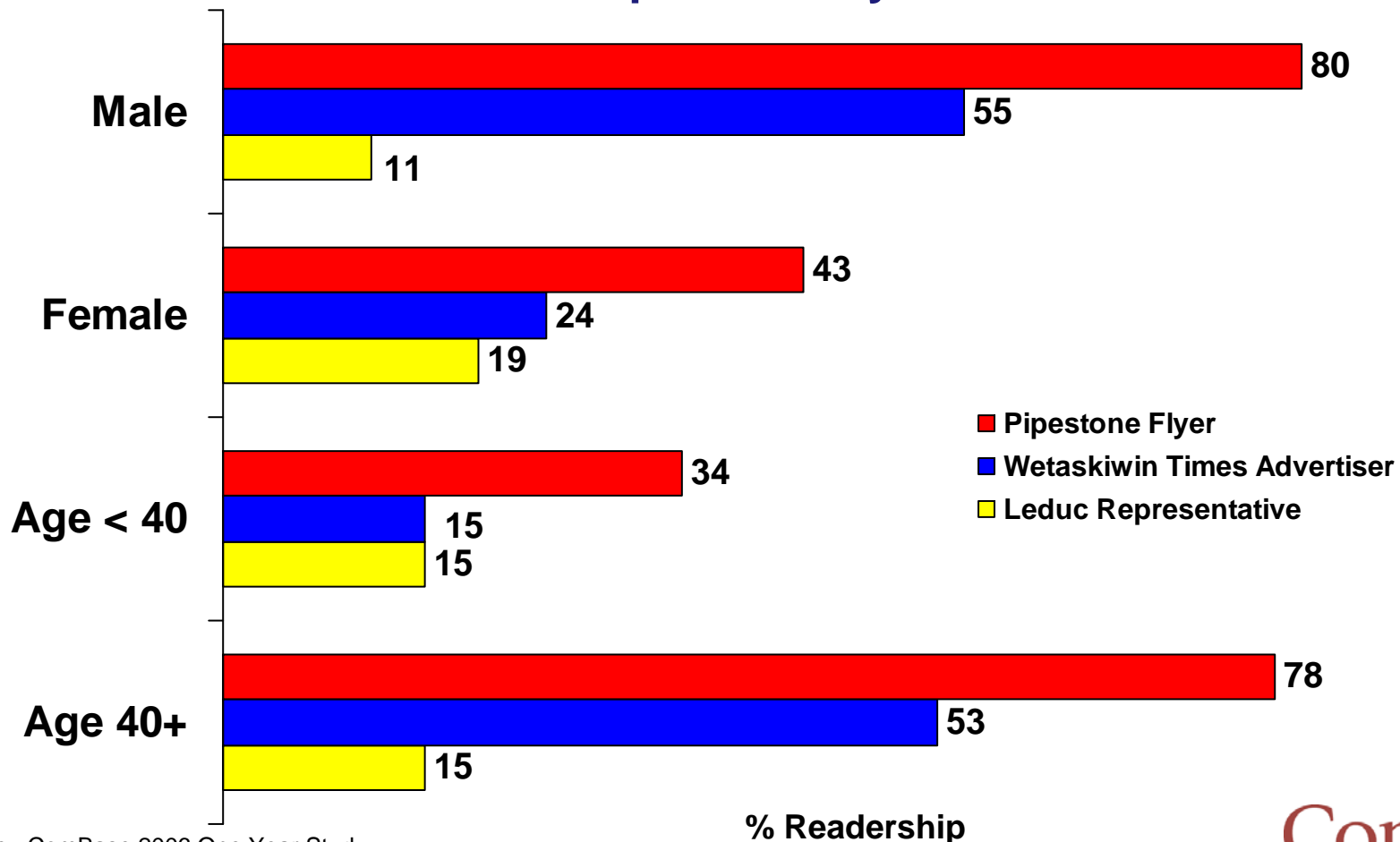
Demographics Overview

Because of their high reach, community newspapers attract a desirable audience comprising of:

- Home owners
- Families with children
- Educated consumers
- Professionals
- High income earners
- Ethnic populations, including aboriginals
- More women than other mass media

% Reach by Demographic Sector (Wetaskiwin/Leduc, AB)

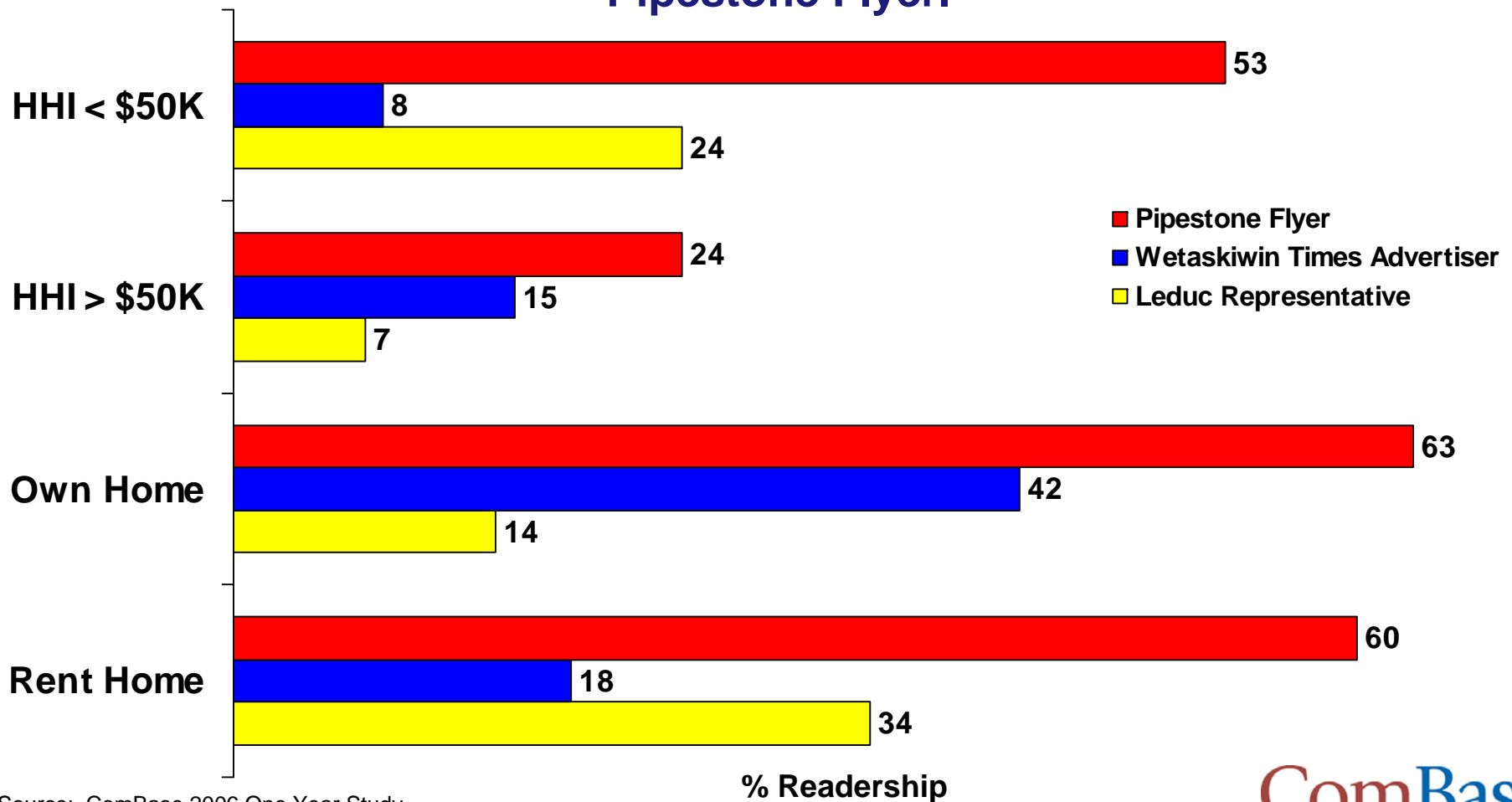
43% of women and 80% of men in Wetaskiwin/Leduc are reading The Pipestone Flyer.



Source: ComBase 2006 One Year Study
*Base Population – Pipestone Flyer Distribution Area (19,600)

% Reach by Demographic Sector (Wetaskiwin/Leduc, AB)

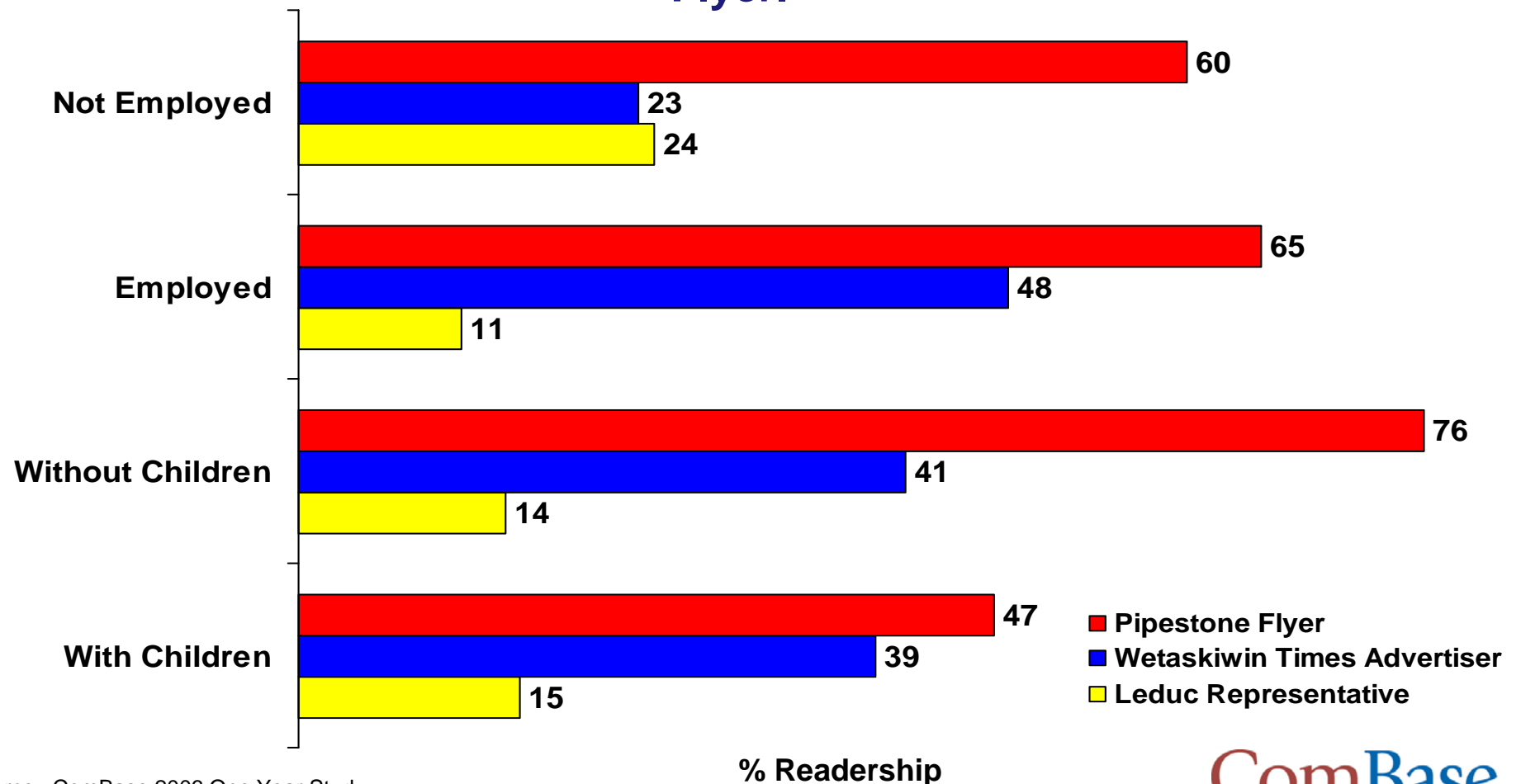
63% of Wetaskiwin/Leduc homeowners are reading The Pipestone Flyer.



Source: ComBase 2006 One Year Study
*Base Population – Pipestone Flyer Distribution Area (19,600)

% Reach by Demographic Sector (Wetaskiwin/Leduc, AB)

65% of Wetaskiwin/Leduc employed adults are reading The Pipestone Flyer.

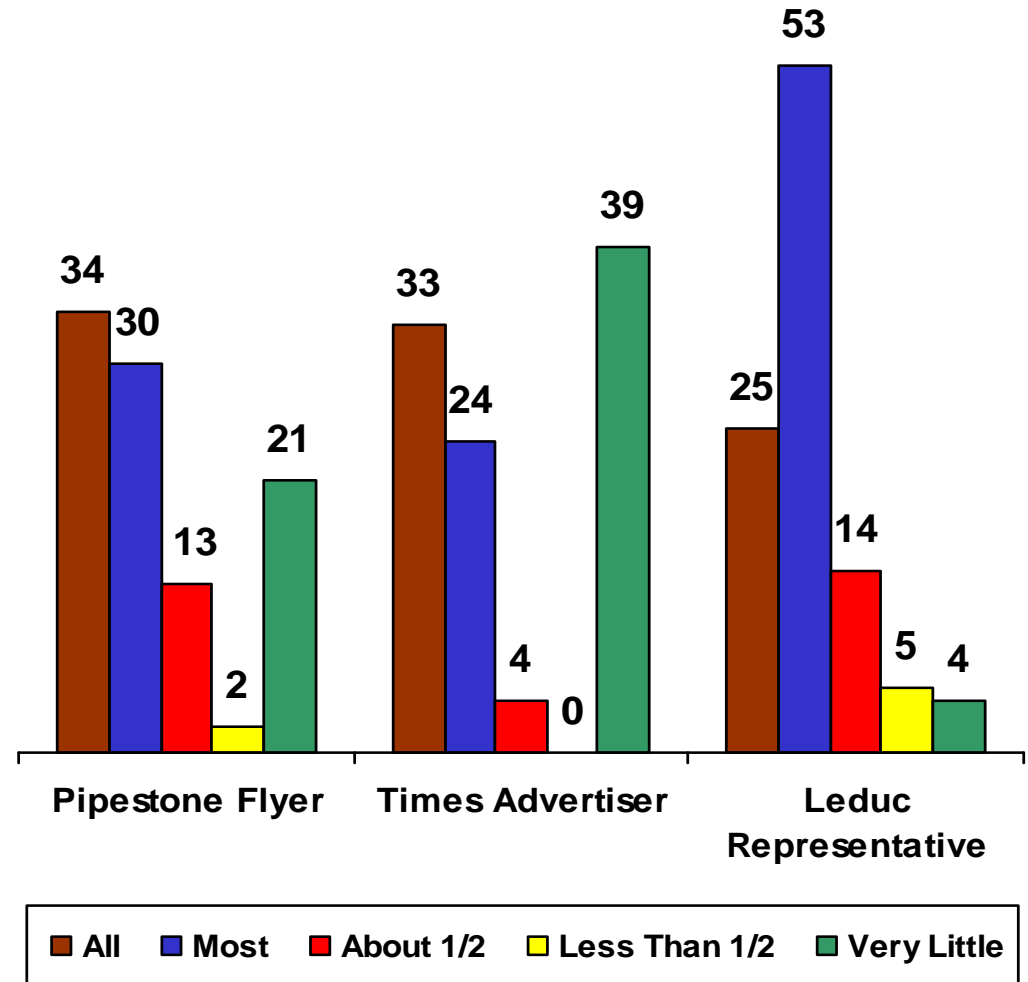


Source: ComBase 2006 One Year Study
*Base Population – Pipestone Flyer Distribution Area (19,600)

How Much of the Paper is Read

(Wetaskiwin/Leduc, AB)

- Readers of each paper were asked how much they read
- Wetaskiwin/Leduc adults are strong newspaper readers, reading the majority of every issue!
- **34%** of **Pipestone Flyer** readers tend to read All of the Paper
- **33%** of **Wetaskiwin Times Advertiser** readers tend to read All of the Paper
- **25%** of **Leduc Representative** readers tend to read All of the Paper



Source: ComBase 2006 One Year Study

*Base Population – Pipestone Flyer Distribution Area (19,600)

**May not total 100% due to exclusion of “Refused/Not Stated” responses

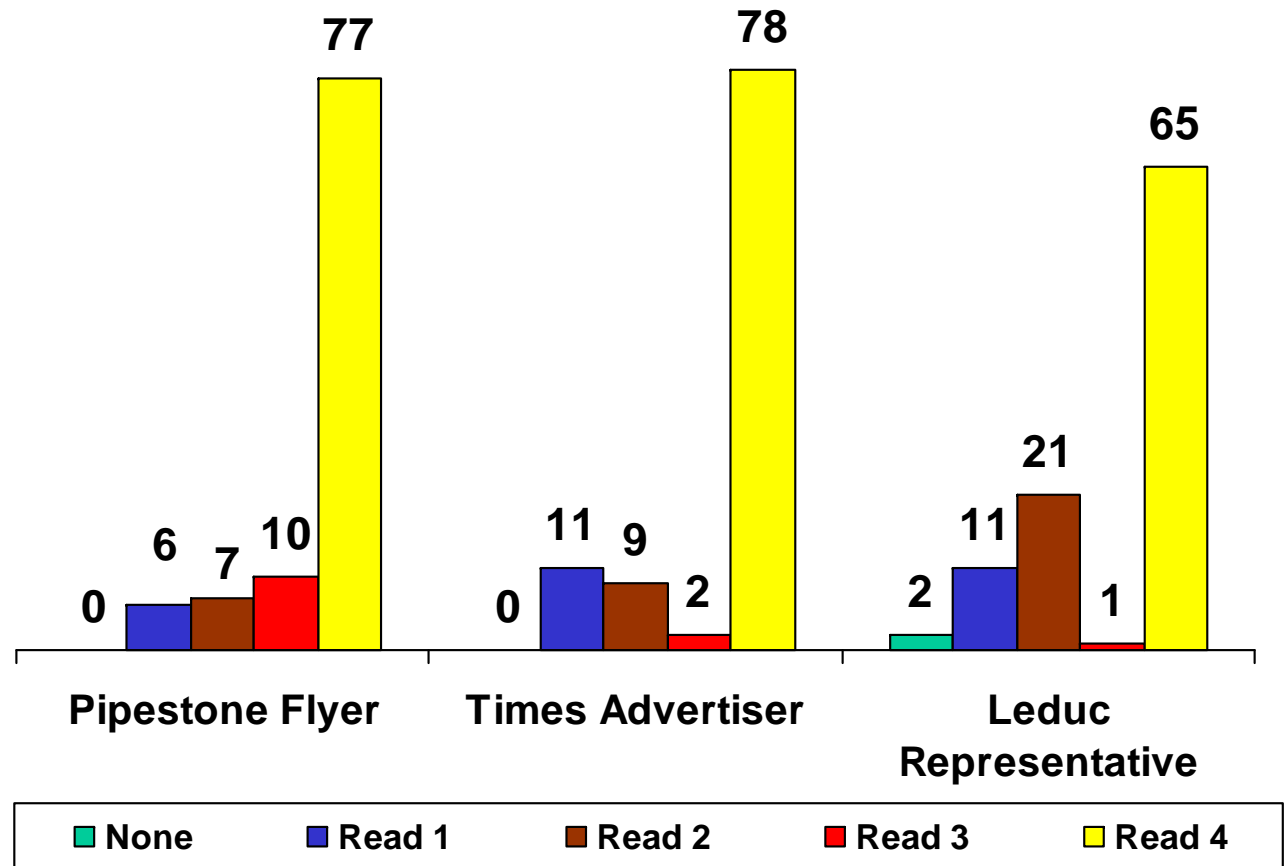
% of Readers

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Number of Issues Read

(Wetaskiwin/Leduc, AB)

- Wetaskiwin/Leduc newspaper readers are loyal, reading almost every issue!
- **77%** of **Flyer** readers read all 4 of the last 4 issues
- **78%** of **Wetaskiwin Times Advertiser** readers read all 4 of the last 4 issues
- **65%** of **Leduc Representative** readers read all 4 of the last 4 issues



% of Readers

Source: ComBase 2006 One Year Study

*Base Population – Pipestone Flyer Distribution Area (19,600)

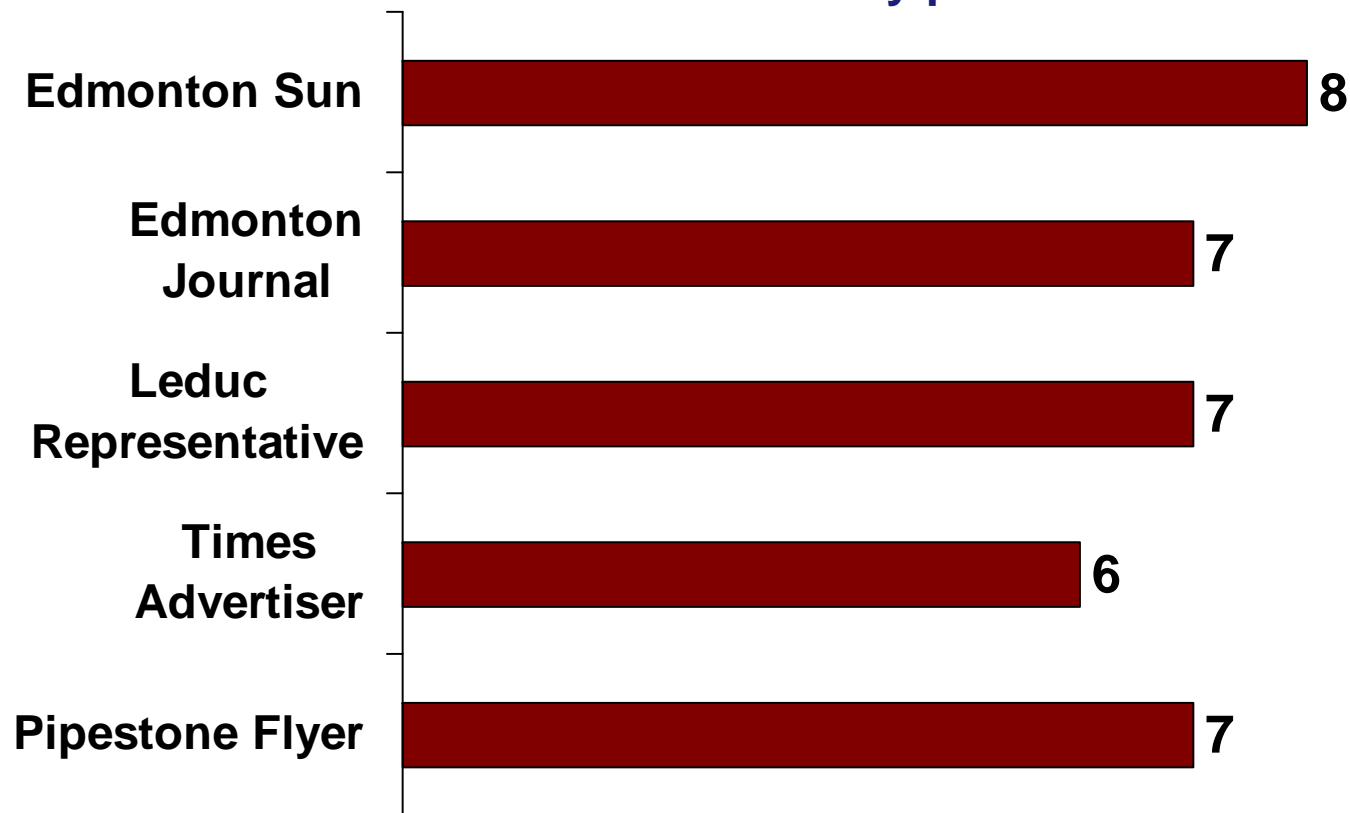
**May not total 100% due to exclusion of “Refused/Not Stated” responses

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Newspaper Ratings

(Wetaskiwin/Leduc, AB)

Respondents were asked to rate newspapers in Wetaskiwin/Leduc using a scale of “1” to “10” where “10” would be interpreted as “extremely good” and “1” as “extremely poor”.



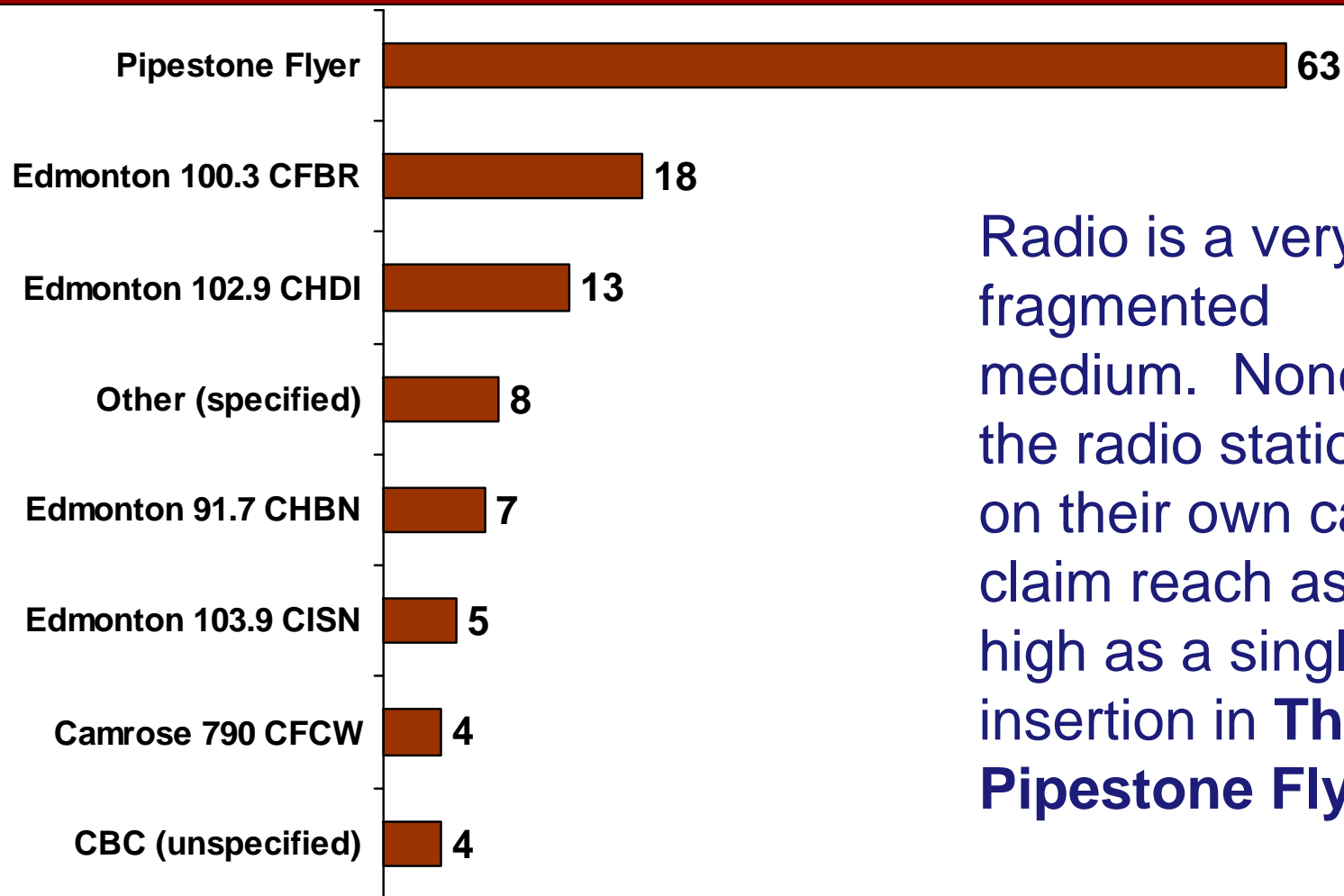
■ Rating (1-10)

Source: ComBase 2006 One Year Study
*Base Population – Pipestone Flyer Distribution Area (19,600)

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Media Habits – Newspaper vs. Radio

(Wetaskiwin/Leduc, AB)



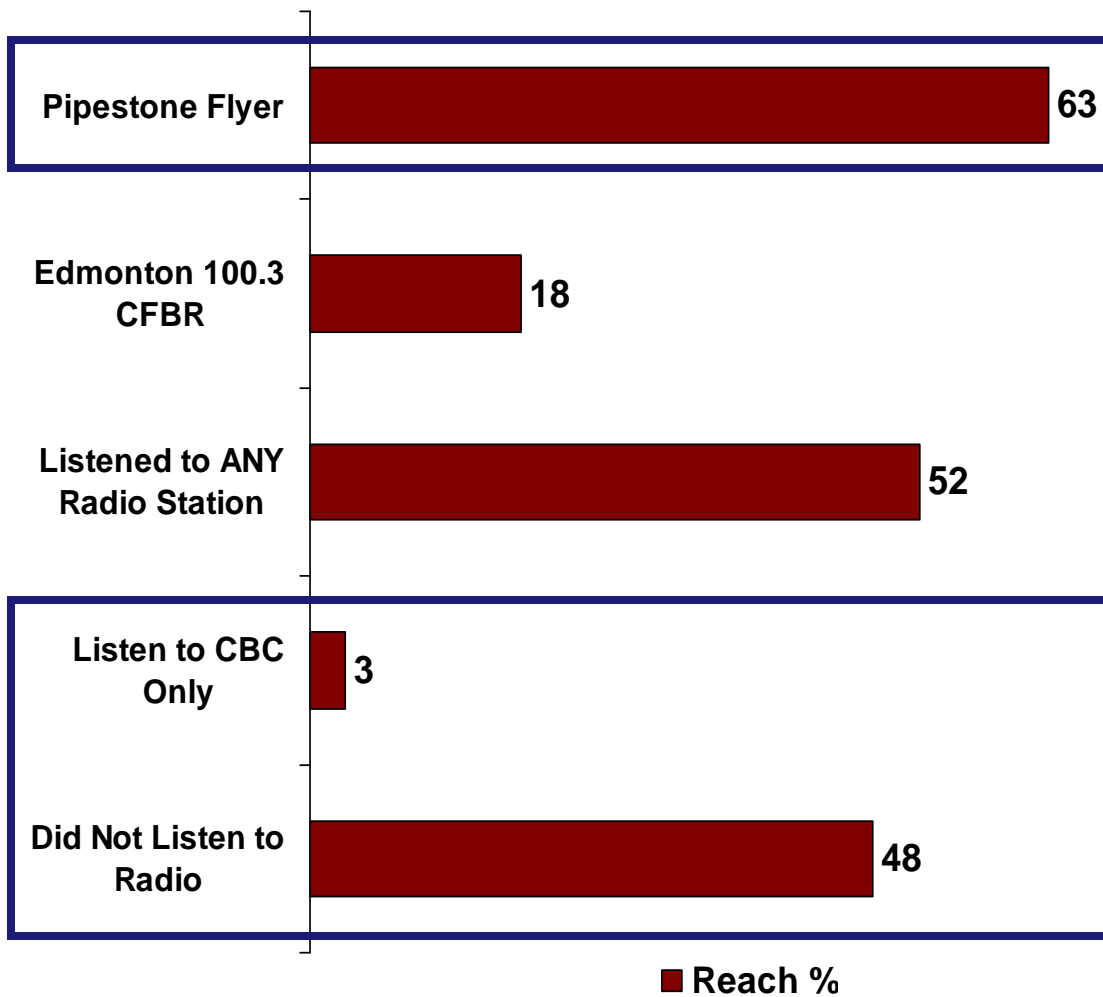
Radio is a very fragmented medium. None of the radio stations on their own can claim reach as high as a single insertion in **The Pipestone Flyer**.

■ % Reach

Source: ComBase 2006 One Year Study
Radio Stations Listened to Yesterday – Stations with less than 2% reach not shown
*Base Population – Pipestone Flyer Distribution Area (19,600)

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Media Habits – Newspaper and Radio (Wetaskiwin/Leduc, AB)



The Flyer Outperforms Radio

- One insertion in The Flyer reaches more than the top radio station
(63% vs. 18%)
- To reach the **52%** listening to Any Radio Station you would have to buy spots throughout the day on all radio stations available in the counties of Wetaskiwin and Leduc!

Radio Reach is Limited!

- **51%** of the population cannot be reached with commercial radio
 - 48% did not listen to any station yesterday
 - 3% listened to **ONLY** CBC yesterday

Source: ComBase 2006 One Year Study

*Base Population – Pipestone Flyer Distribution Area (19,600)

**see previous slide for specific station reach*

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Cross Readership

(Wetaskiwin/Leduc, AB)

- **7,300** Wetaskiwin Times Advertiser readers report *also* reading **The Pipestone Flyer**
 - **92%** of Wetaskiwin Times Advertiser readers can be reached using **The Pipestone Flyer**
- **87%** of Leduc Representative readers report *also* reading **The Pipestone Flyer**

Source: ComBase 2006 One Year Study

*Base Population – Pipestone Flyer Distribution Area (19,600)

Pipestone Flyer Strengths

- Top line readership for **The Pipestone Flyer** is very strong against other newspapers in Wetaskiwin and Leduc counties with **63%** readership
- **Flyer** readers are strong and regular readers
 - **77%** read all 4 of the last 4 issues; and **34%** read All of the Paper
- **The Flyer** rates well among Wetaskiwin and Leduc adults
 - with a rating of **7** out of 10
- **The Flyer** provides higher reach than any single radio station and Wetaskiwin/Leduc adults are hard to reach with radio
 - **51%** cannot be reached at all with radio advertising!
- **The Flyer** has strong cross readership
 - **7,300 Wetaskiwin Times Advertiser** readers report also reading **The Pipestone Flyer**