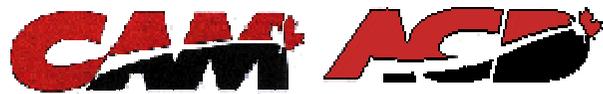


Maximizing your ROI with Yellow Pages Group



Canadian Association of Movers

Brandon Grosvenor
National Director of Sales
Yellow Pages Group
2006-09-18

Agenda

- **Yellow Pages Group overview**
 - Company Profile
 - Fast Facts
 - Value Equation
- **Moving and Storage**
 - Heading Profile
 - Media Impact
- **The Power of the Web**
 - Should I Invest?
- **How to improve the “*effectiveness*” of your Yellow Pages print advertising**
 - Keys to driving higher Call Volumes and ROI
- **Q&A**

Company Overview

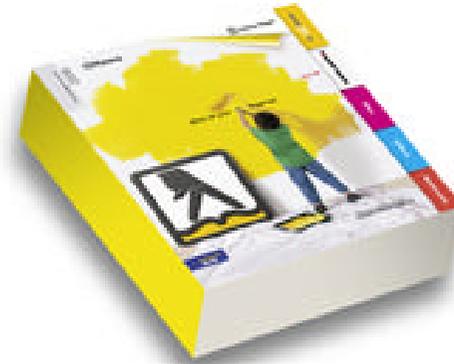
Yellow Pages Group (YPG) is the leading Canadian directory publisher and has been an industry leader since it published its first directory in 1908. The Company is the official publisher of Bell Canada's directories. YPG is also the official publisher of Telus' directories, as well as of a number of other incumbent telephone company directories that have a leading market share in their respective markets. YPG is the incumbent directory publisher in Québec, Ontario, Alberta, British Columbia, the Territories and Atlantic Canada, the latter through Aliant ActiMedia.

Yellow Pages Group owns and manages Canada's most visited online directories YellowPages.ca[™], Canada411.ca and SuperPages.ca as well as the CanadaPlus.ca network, a leader in the local city sites market, including MontrealPlus.ca[™], QuebecPlus.ca[™], TorontoPlus[™], CalgaryPlus.ca[™], EdmontonPlus.ca[™], OttawaPlus.ca and VancouverPlus.ca. These sites attract over 7 million unique visitors per month.

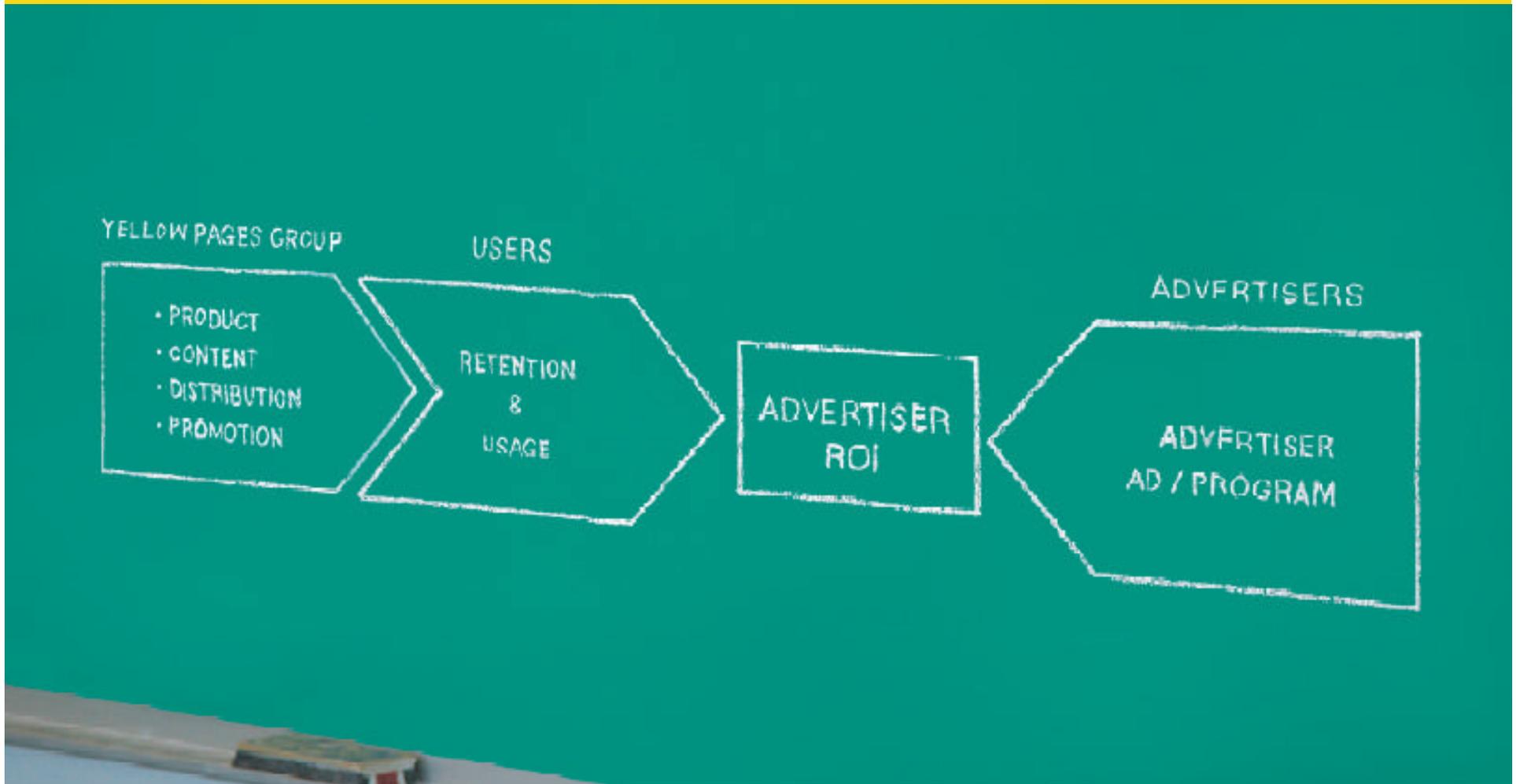
Fast Facts

Largest Directories Publisher:

- 330 Directories Across Canada
- 28 Million Copies Annually
- Covering 93% of the population
- Used at least 1x per month by 70% of Canadians
- 380,000 Advertisers
- On-line leader reaching 1-3 On-line Canadians



Value Equation



An exceptional value equation

Usage & Media Impact

Moving And Storage

Who's calling?

14% of adults consulted this heading in the Yellow Pages print directories in the past year

In addition, the **Moving And Storage** heading is referenced on average **4** times a year

Who they look for?

68% have no name in mind or more than 1 name in mind (Shoppers)

32% have a business in mind (Referrals and repeat customers)

How do they purchase?

92% follow up with a call or visit and of these,

55% make a purchase

How do they search?

On average, consumers looked at **4** ads when they refer to the Yellow Pages directories

Your customers

Spend an average of **\$486** and

59% are new buyers

Related headings

Automobile & Truck Transporting
Cartage & Express
Containerized Freight Service
Containerized Freight Service
Export Packing Service

Source : 2005 Heading Usage Study, conducted by Ad Hoc Research from October 05 to January 06 ; sample of 4,000 adults taken from the Canadian population. Yellow Pages™, the Walking Fingers logo and YellowPages.ca™ are registered trademarks of Yellow Pages Group Co. in Canada.



Yellow Pages™

Success at your fingertips.

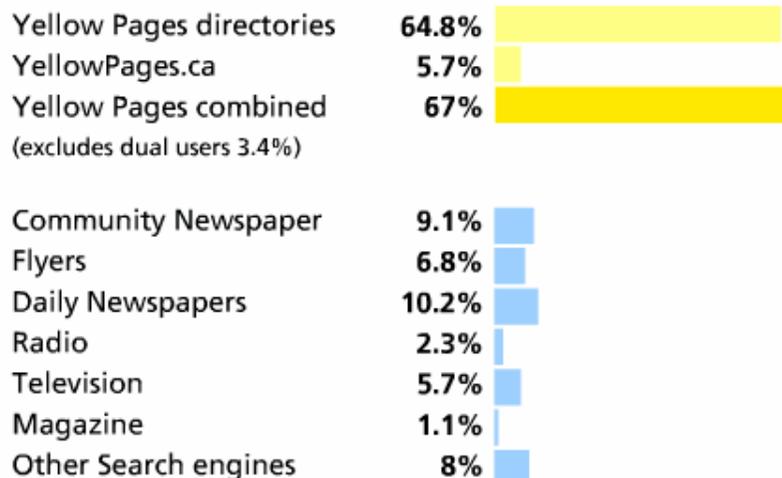
Moving And Storage

Market Potential

9% of adults made a purchase within a 12 month period

Media Impact

The percentage of consumers who used the advertising and information sources listed here when involved in a purchase decision



Buyer Profile

% Index

Sex:		
Male	48	100
Female	52	100

Age:		
18 - 24	9	75
25 - 34	31	182
35 - 44	25	114
45 - 54	21	105
55 - 64	11	92
65+	3	19

Education:		
High School or less	50	93
College	26	96
University	24	126

Household Income:		
Under \$20,000	22	76
\$20,000 - \$49,999	26	96
\$50,000+	52	118

Source : 2005 Media Impact Study, conducted by Ad Hoc Research from October 05 to January 06 ; sample of 4,000 adults taken from the Canadian population. Yellow Pages™, the Walking Fingers logo and YellowPages.ca™ are registered trademarks of Yellow Pages Group Co. in Canada.



Yellow Pages™

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The Power of The Web

The Web – Should I Invest?



The screenshot shows the YellowPages.ca website interface. At the top left is the YellowPages.ca logo, which consists of a stylized 'A' icon and the text 'YellowPages.ca™'. Below the logo is a photograph of a young girl with long brown hair, wearing a white shirt, sitting and smiling while looking at a large yellow folder she is holding. To the right of the photo is a search area with a yellow background. The search area is titled 'Find a Local Business in Canada'. It contains two input fields: 'Keyword(s) or Business Name*' with a help icon and 'Location*' with a help icon. The first field contains the text 'Movers' and the second field contains 'Toronto'. To the right of these fields is a 'Find' button. Below the input fields are two examples: 'e.g. Bill's Flowers, Tulips, Florists, 416-412-5999' and 'e.g. Toronto, H2L 3K5, CN Tower'. At the bottom of the search area, it says '*Required fields'.

The Web – Should I Invest?



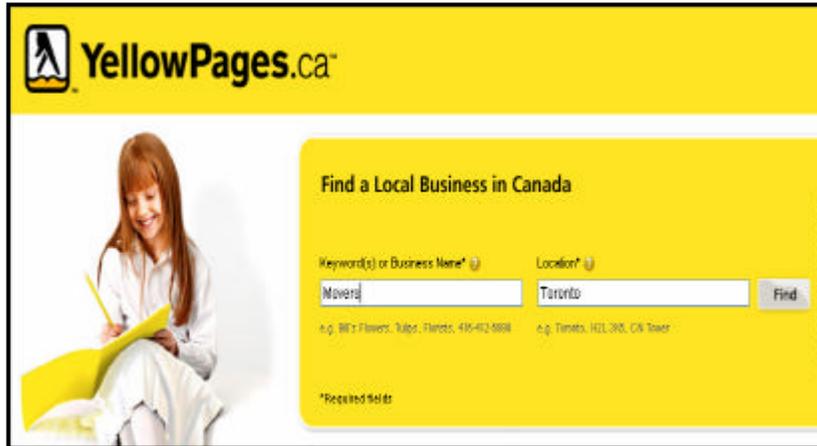
No Name in Mind - Searches:

Heading: Moving and Storage										Province: All	
Sept 2005	Oct 2005	Nov 2005	Dec 2005	Jan 2006	Feb 2006	Mar 2006	Apr 2006	May 2006	Jun 2006	Jul 2006	Aug 2006
31,659	31,148	29,280	21,960	32,941	30,711	42,386	58,593	66,063	62,126	54,076	57,540

Total: 518483

***Over 518,000 Searches
in the Past 12 Months !***

The Web – Should I Invest?



- ✓ Almost 6% of all searches for Movers in Canada are performed on Yellow Pages.ca
- ✓ Compared to 8% of all other Search Engines combined
- ✓ Combined; Yellow Pages print and Yellow Pages.ca - reach 67% of all Canadians searching for Movers.

What Drives Calls?

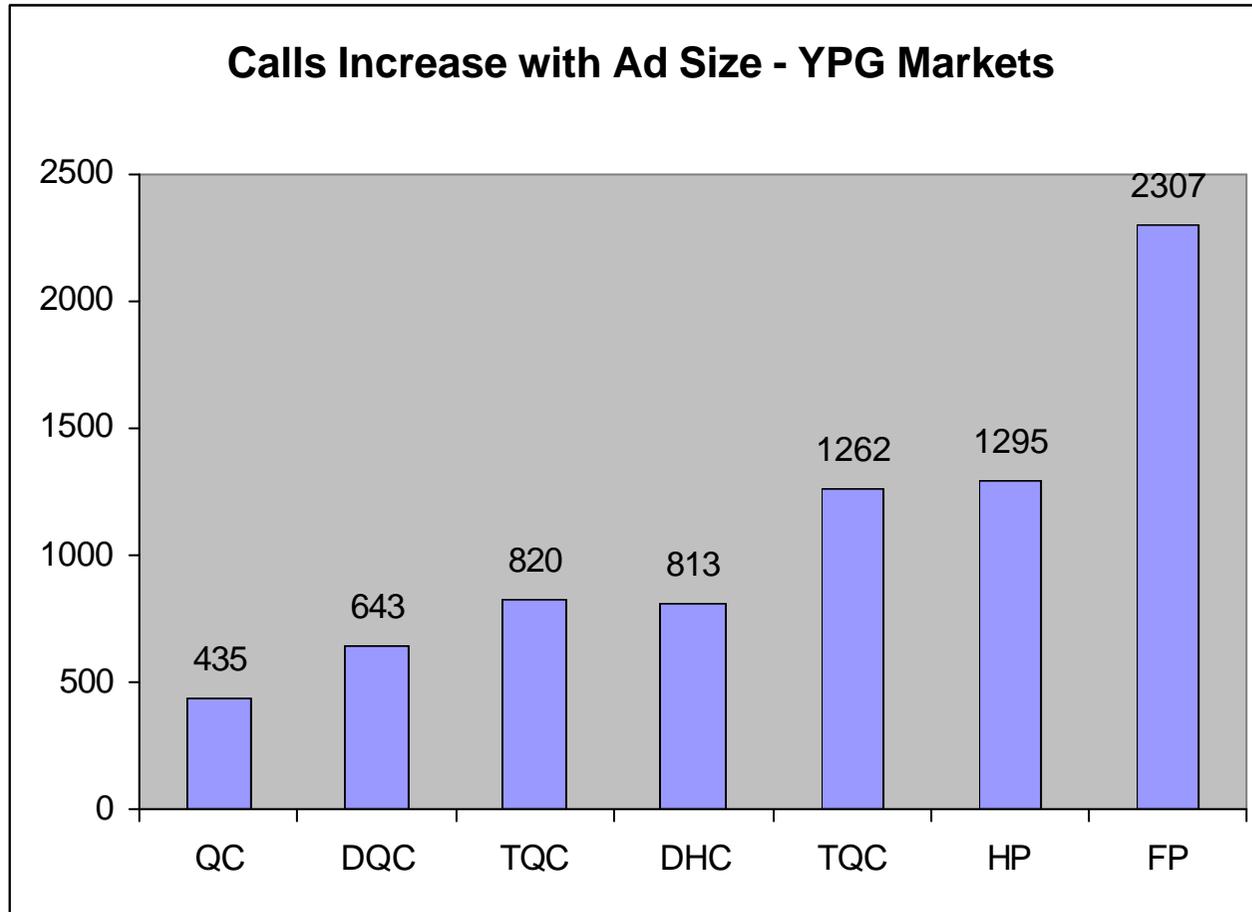
Life Events Drive Higher Usage

75+% of personal usage by people experiencing major life events

Event	Yellow Pages Usage Level
Bought first home (experienced)	109%
Currently Engaged	99%
Make Last Mortgage Payment (anticipate)	97%
Oldest Child Enters School (experienced)	83%
Get married (anticipate)	79%
Change to lower pay job (experienced)	73%
Change Jobs - same pay (experienced)	69%
Changed to Different Type Job (experienced)	65%
Moved into Present Residence in Past 12 mo.	61%
Graduation from School (experienced)	56%
Changed to Better Job (experienced)	50%
Child Enters College (anticipate)	48%
First time financial investment (both)	47%
First Child Born (experienced)	46%
Laid off /Out of Business (both)	43%
Buy New Home - Not First (experienced)	43%
Separated / Divorced (experienced)	42%
Youngest Child Leaves Home (anticipate)	42%
Collect from Pension / Stock / Savings Plan (experienced)	41%
Temporarily Unemployed	39%

Source: Simmons 2004

Calls Increase with Ad Size



Source: CRM Associates 2006 – YPG 2006 Metered Ad Study

BUT...

**Improving ad content is the
only way to get a 2- to 10-
fold increase in calls.**

General Observations

Users are looking for 2 kinds of information simultaneously:

- Educational information
 - *What is important?*
 - *What questions should I be asking?*
- Shopping information
 - *Who should I contact?*
 - *Who can I trust?*

Content Study: 13 Rules for Success...

- Users assume nothing and use the ads that give them the most complete & relevant information.
- Impart a sense of personal caring and a customer service. “Make me feel like they are doing something for me.”
- Ads the user can relate to and identify with (receiving the benefits) perform best.
- Ads that are clear, easy to read, with lots of open (white) space.
- Multiple locations and/or lines and/or “regions-served” are gold.
- Bullets are “in”. Paragraphs are “out”.
- Give consumers a reason to do business with you.

Content Study: 13 Rules for Success...

- Pictures /graphics that allow the user to identify with the benefits.
- Some things have to be stated just because they are industry standard information – not including the information could hurt.
- Credentials are a positive.
- Headline needs to be large, clear, benefit-oriented or differentiating.
- “Value” outdraws “cheap” or “lowest price.”
- Service outdraws “technology” / “state of the art”.



Executive Summary

- Yellow Pages advertising still far and away the most effective media for Movers – Reach of 67% of the total market.
- The Web adds additional reach to your existing print campaign – 5.7%
- Life events are a major driver of Yellow Page Usage, ensure you are there when consumers are “Ready to Buy”
- Improving your ad will increase call volumes and generate greater ROI – Follow the 13 rules for success and increase your share.

Thank You