

AdWest Marketing Inc.

A Research Study Highlighting the Differences Between
Urban and Rural Populations in Manitoba and Saskatchewan
in five key geographic segments:

*How Geography Impacts Media Access, Usage and
Engagement*

Funded by the
Government
of Canada

Financé par le
gouvernement
du Canada

Canada

COMMUNITY NEWSPAPERS *RESULTS*



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MARKET DATA | READERSHIP INFO | RESULTS

750 Phone Interviews Between March 1 – March 15, 2018 Conducted by Random Sample:

- 150 Farms
- 150 Hamlets/Rural (Communities Under 1,000 Population)
- 150 Villages (1,000-5,000 Population)
- 150 Towns (5,000-10,000 Population)
- 150 Small Cities (10,000-50,000)

The survey uses a probability sample of adults 18 years of age or older. The qualifying person in the household with the most recent birthday will be selected for the interview. For the Farmers segment, the questionnaire will screen for most recent birthday among those in the household involved in farming decisions.

Maximum margin of error for 750 completions is $\pm 3.6\%$.

ABOUT THE SUPPLIER:

Totum Research is Canada's leading research firm specializing in the media. Since 1985, Totum has produced reliable and actionable data for a wide variety of clients ranging from national daily newspapers to small market radio stations, from million+ circulation consumer magazines to e-commerce websites and from advertising agencies to multinational corporations. Totum has conducted marketing and communications research for beverage, information technology (IT), women's products, financial institutions, automotive and government departments.

Top Line Results

Total Sample By Age Groupings

Under 45

45-64

55+

ADWEST MEDIA USAGE STUDY: HOW GEOGRAPHY IMPACTS MEDIA ACCESS, USAGE AND CONSUMPTION. TOTUM RESEARCH. MARCH 2018

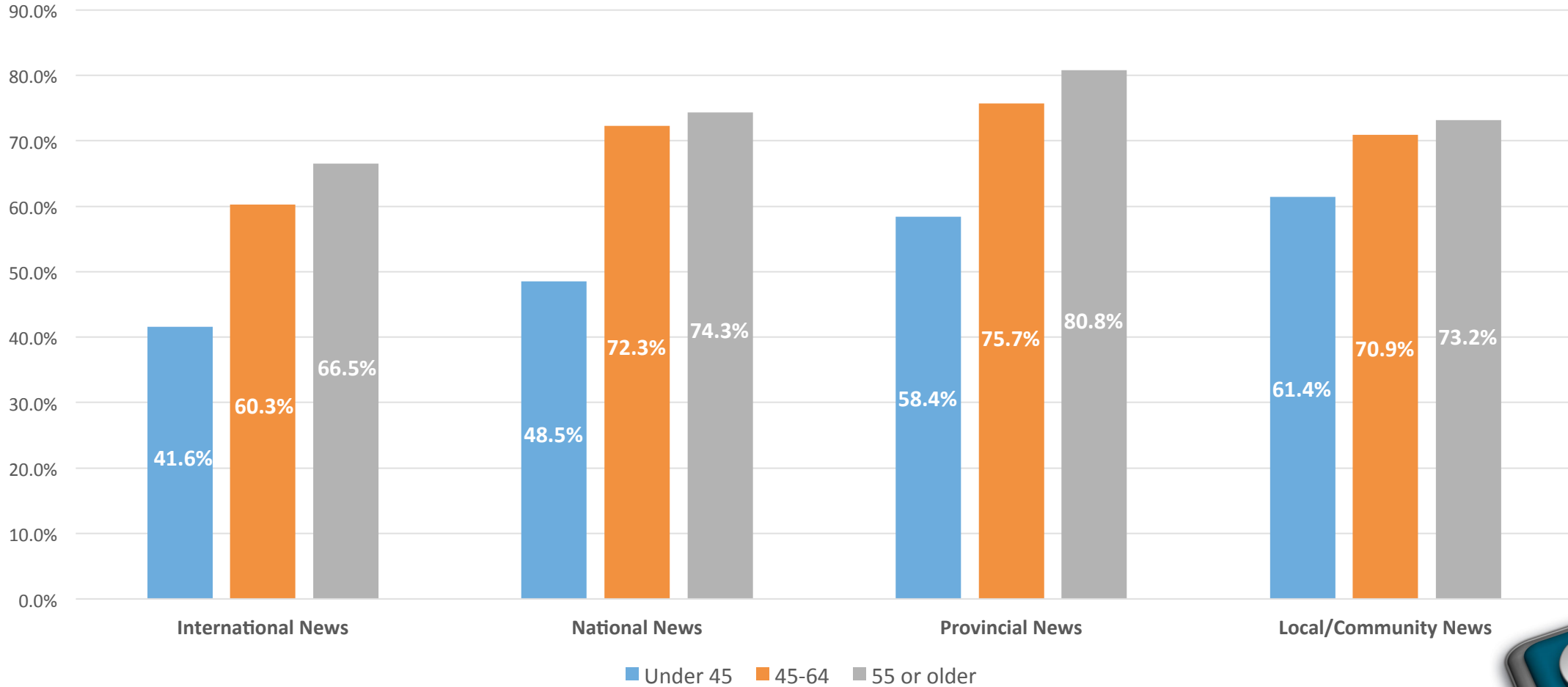
COMMUNITY NEWSPAPERS *RESULTS*



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NEWS REMAINS A STRONG PLATFORM WITH A MAJORITY OF RESPONDENTS IN ALL AGE CATEGORIES INDICATING THEY FOLLOW MOST TYPES OF THE NEWS 'MOST OF THE TIME'

News Followed MOST OF THE TIME



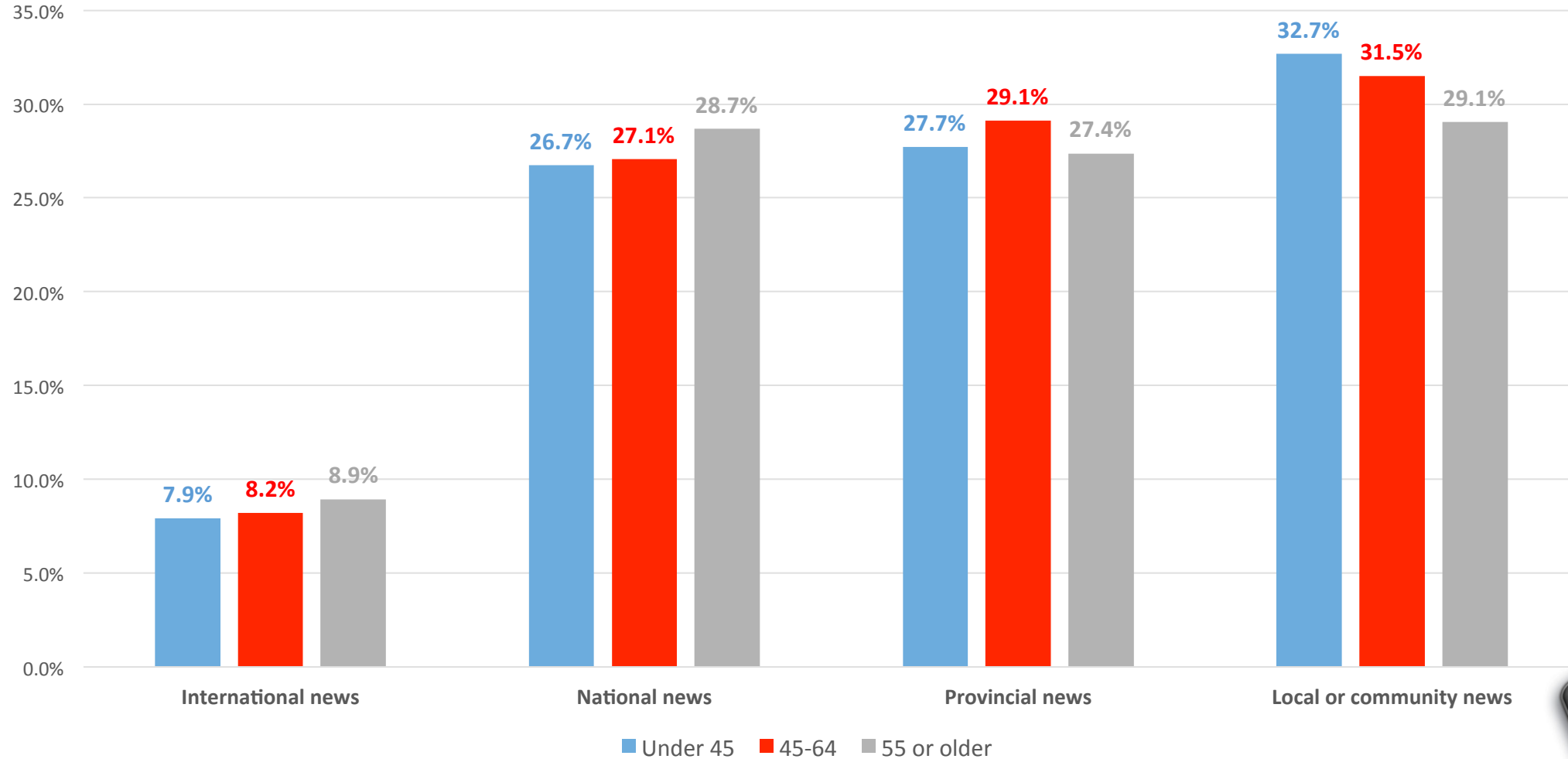
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COMMUNITY NEWSPAPERS RESULTS



RESPONDENTS IN ALL AGE GROUPS INDICATED THAT **LOCAL COMMUNITY NEWS** WAS THE MOST IMPORTANT TYPE OF NEWS TO THEM

Most Important Type of News to You Personally



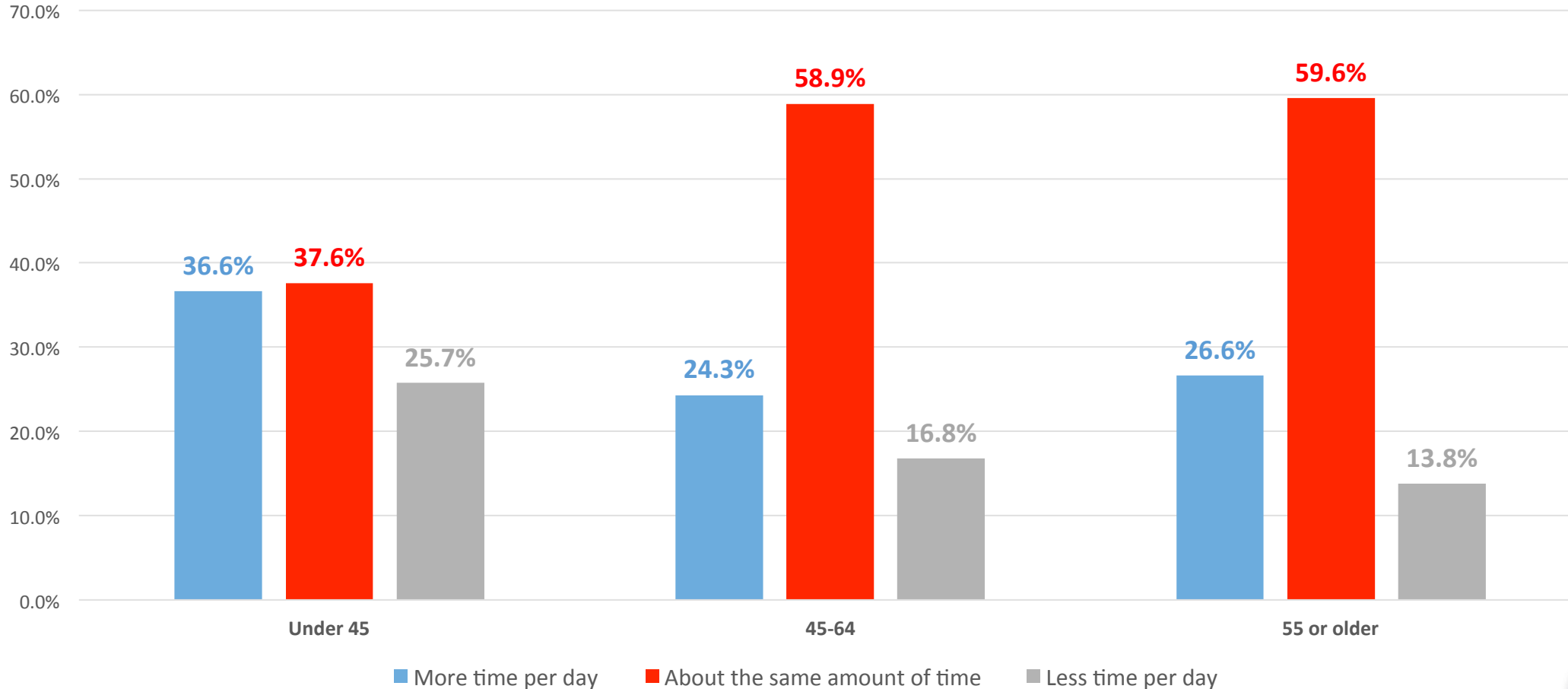
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COMMUNITY NEWSPAPERS *RESULTS*



ACROSS ALL AGE GROUPS RESPONDENTS ARE SPENDING AS MUCH OR MORE TIME WITH NEWS TODAY THAN THEY WERE TWO YEARS AGO

Time Spent With News Compared to 2 Years Ago



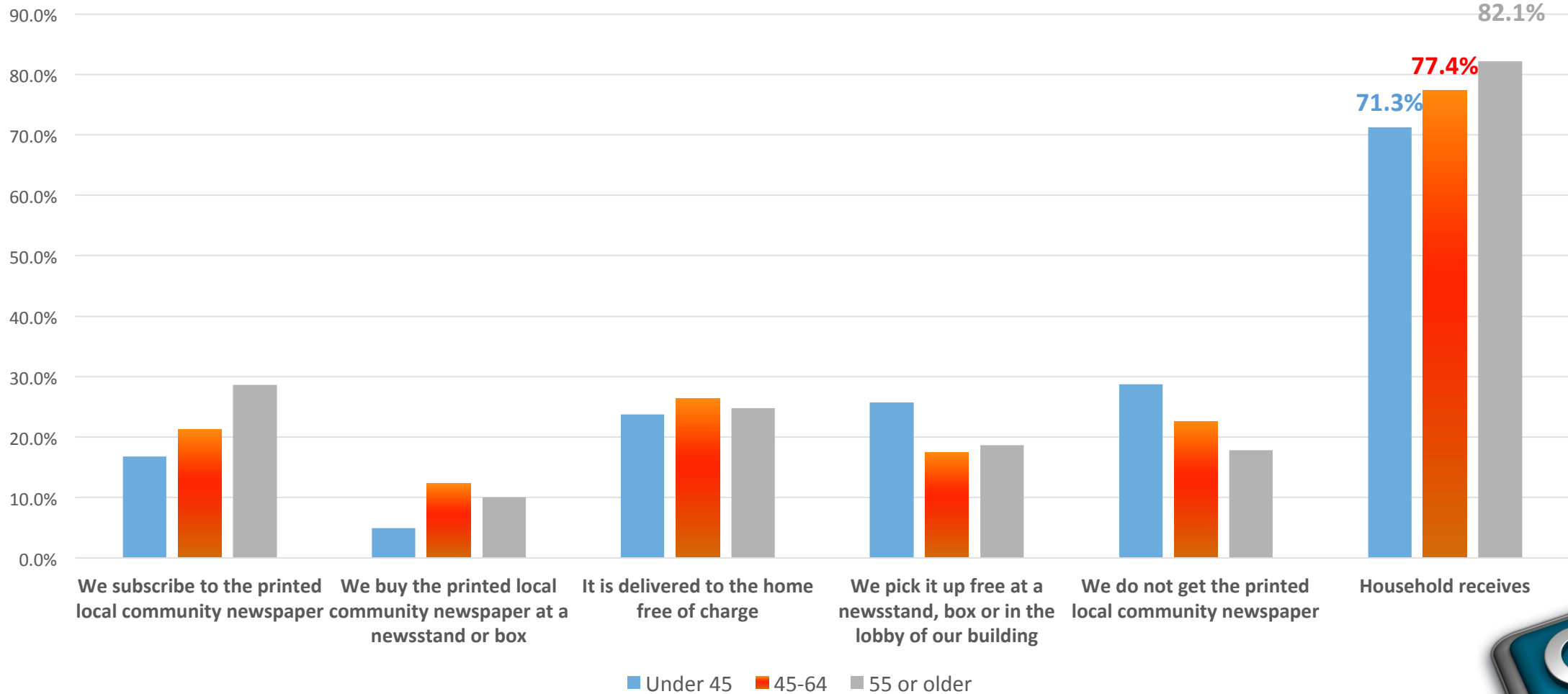
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IN 2018, AT LEAST 7 IN 10 HOUSEHOLDS REGARDLESS OF AGE GROUP RECEIVE A PRINTED NEWSPAPER AT HOME EACH WEEK

Household Receives a Printed Community Newspaper



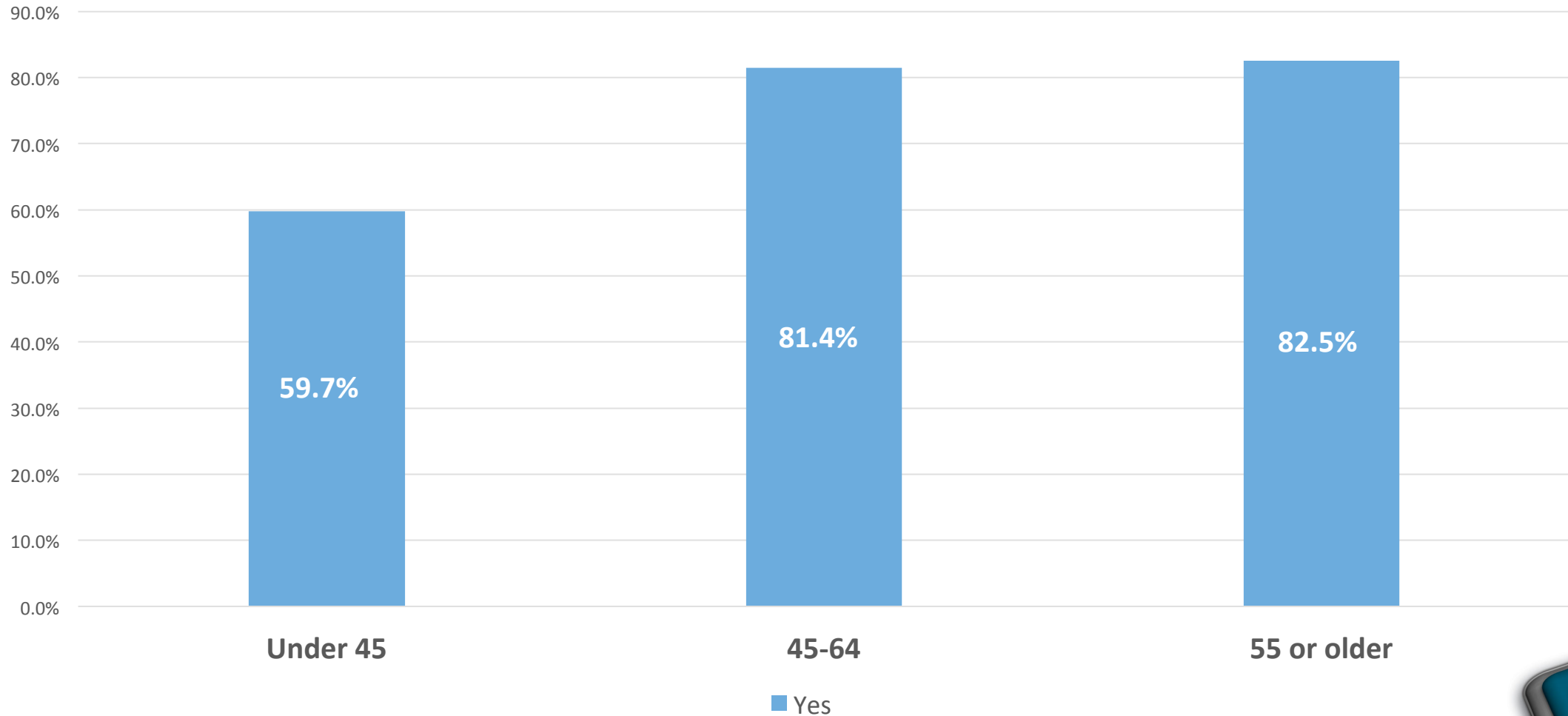
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COMMUNITY NEWSPAPERS RESULTS



READERSHIP OF PRINTED COMMUNITY NEWSPAPERS IS STRONG ACROSS ALL AGE DEMOGRAPHICS

Read or Looked Into a Printed Community Newspaper in the Last Week



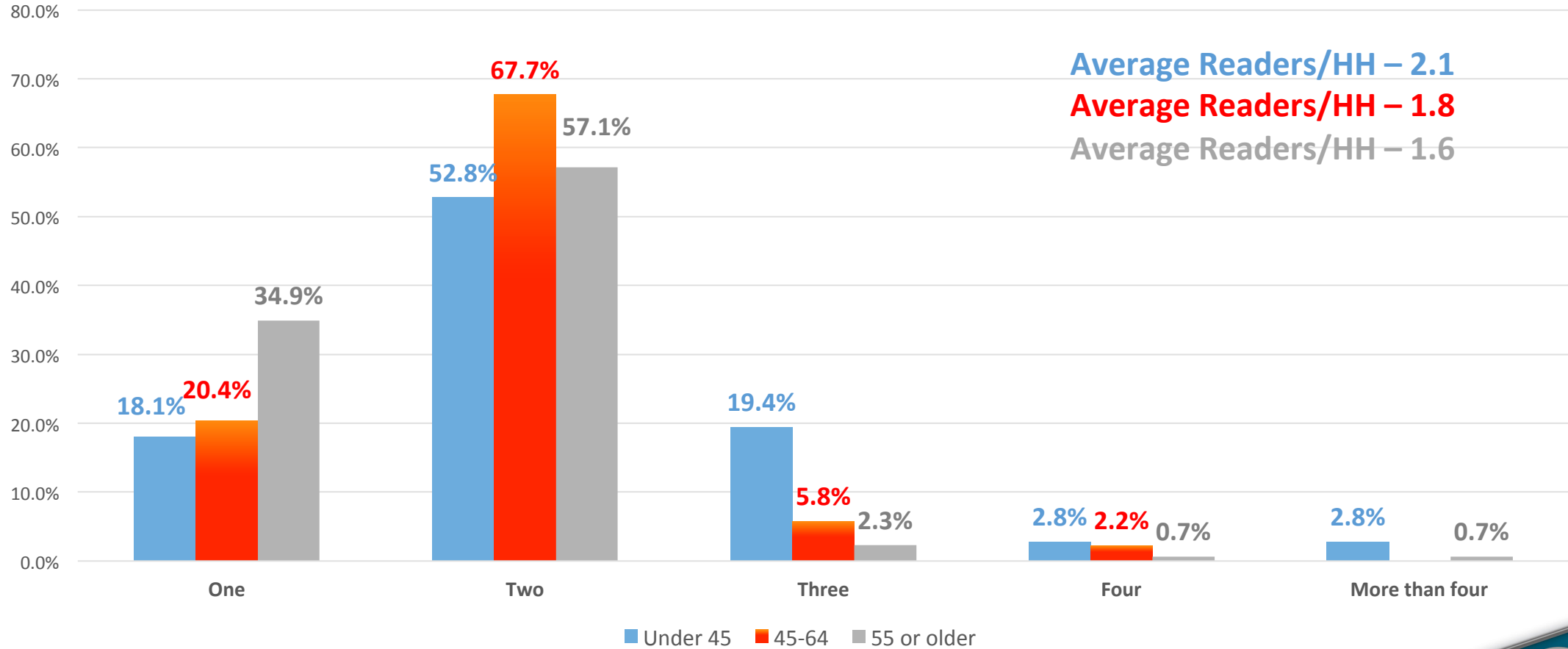
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COMMUNITY NEWSPAPERS *RESULTS*



IN OVER HALF OF HOUSEHOLDS, 2 OR MORE PEOPLE READ THE PRINTED NEWSPAPER EACH WEEK IN ALL AGE GROUPS

Number of Readers Per Household

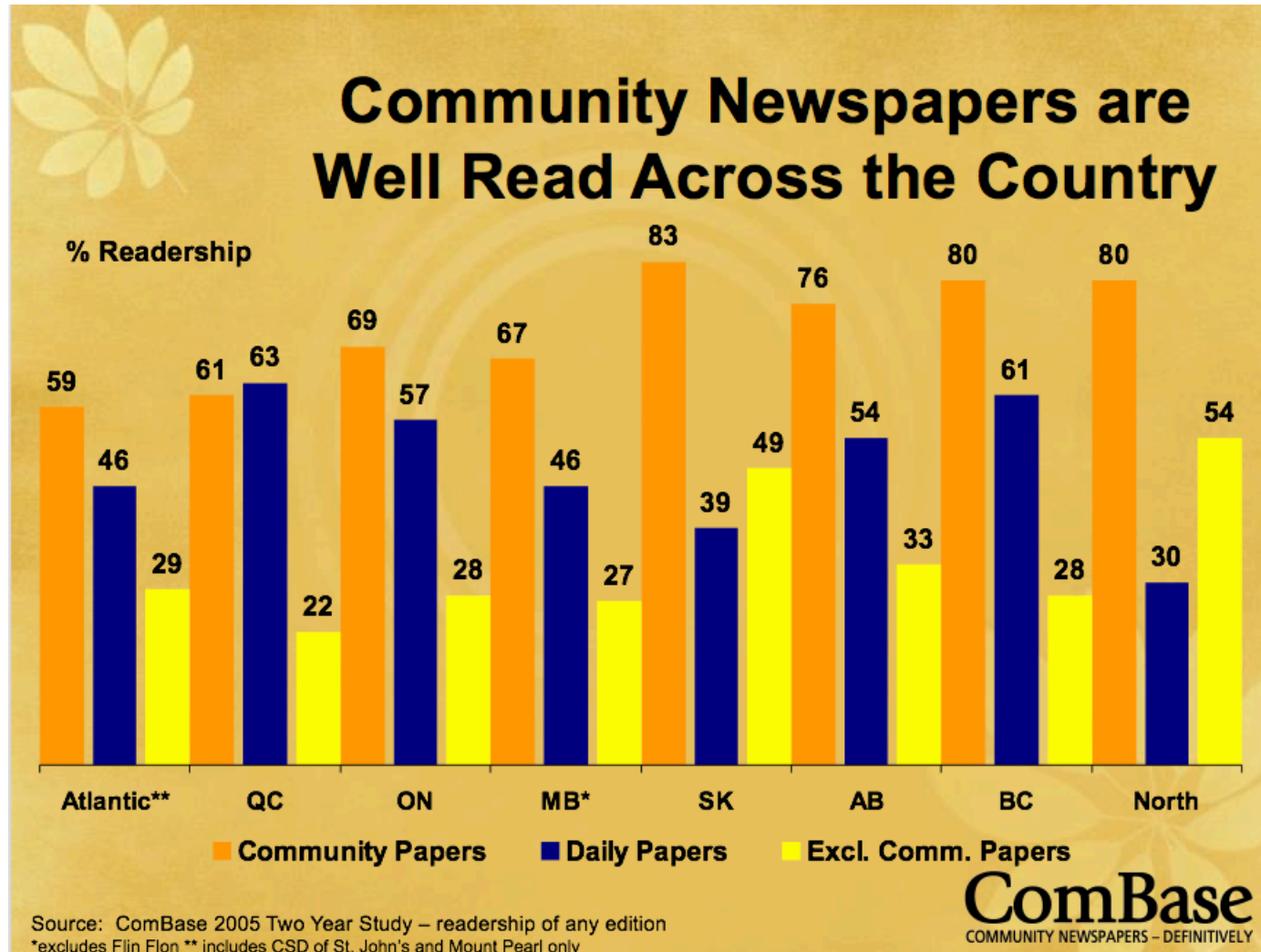


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COMMUNITY NEWSPAPERS RESULTS



In 2005, the National Community Newspaper Readership Study (ComBase) Reported Readership of Community Newspapers in Manitoba at 67% and Saskatchewan at 83%



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COMMUNITY NEWSPAPERS **RESULTS**



Preferred Media for News Having Local Relevance

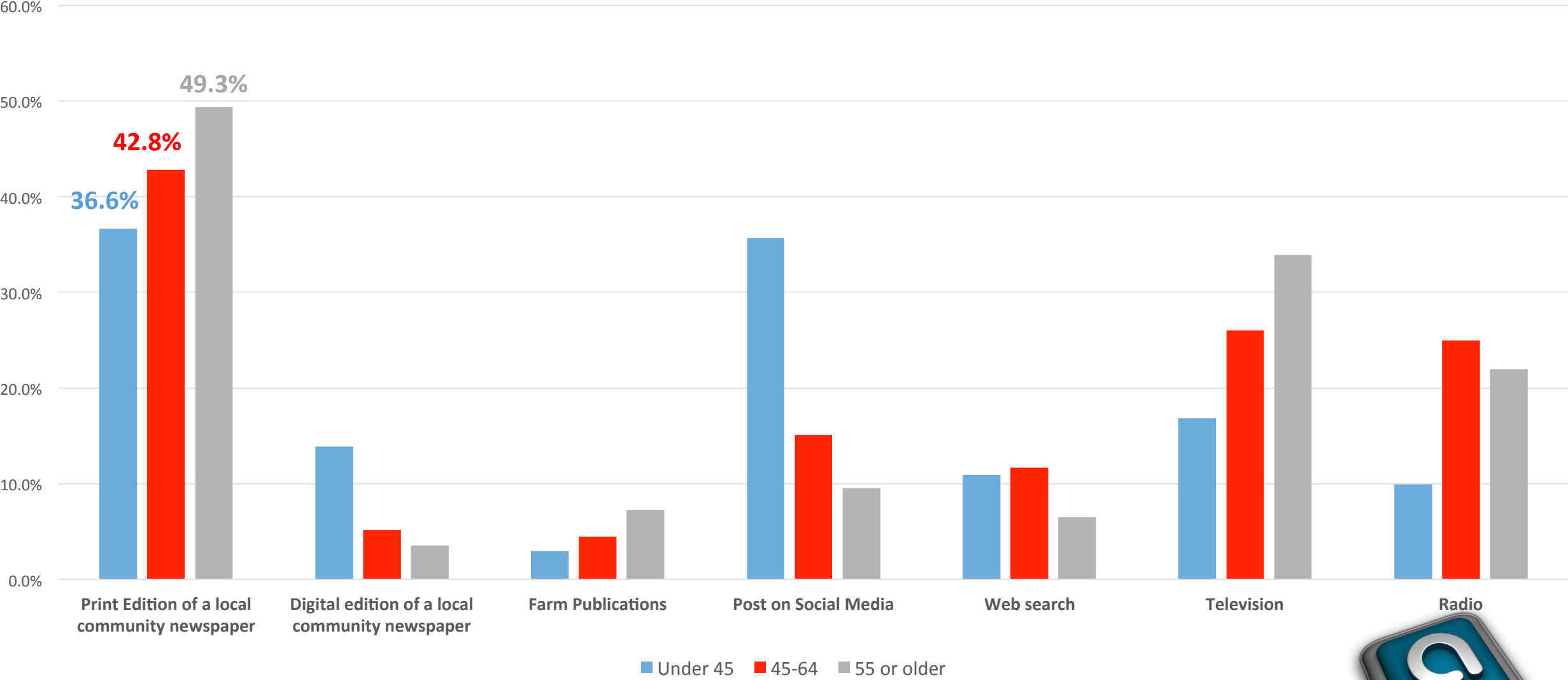
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COMMUNITY NEWSPAPERS *RESULTS*



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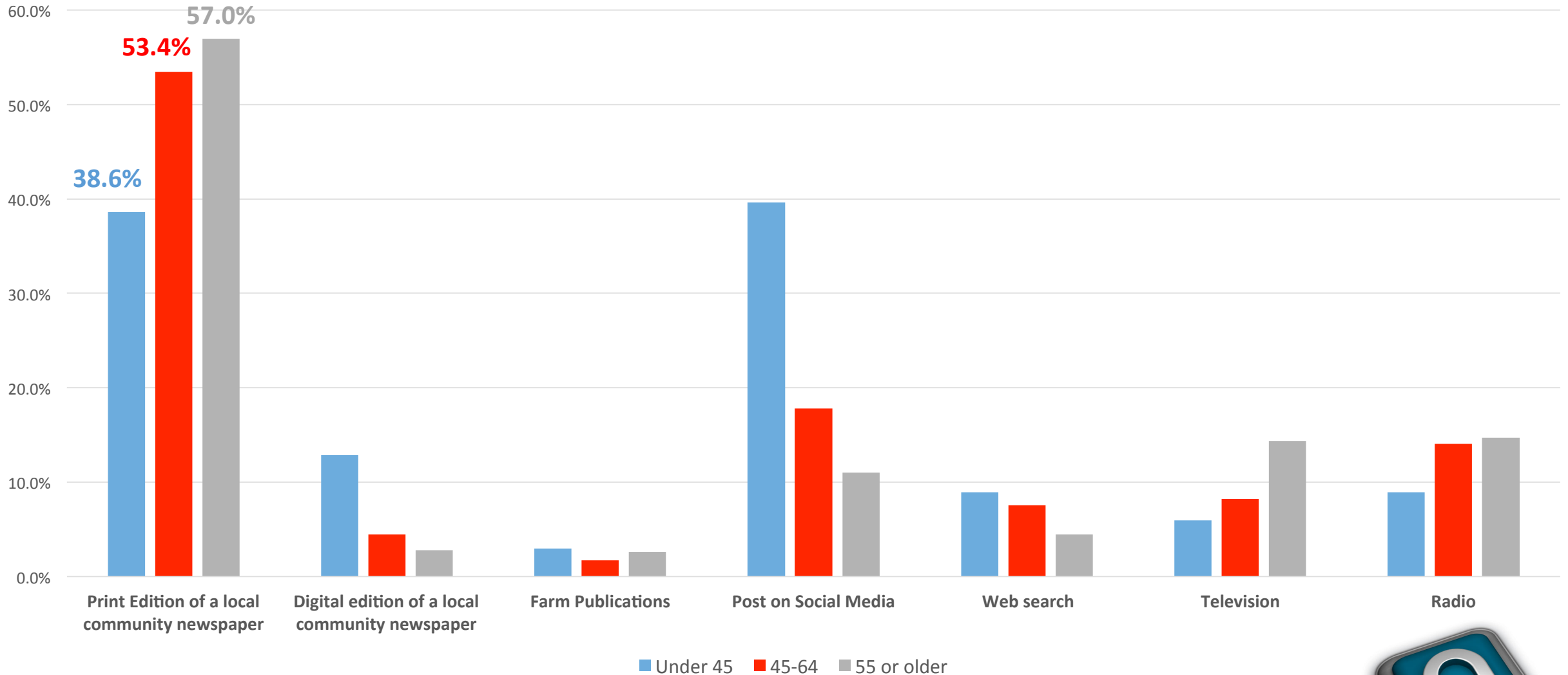
Preferred Media to Receive News About: *Issues Important to the Community*



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COMMUNITY NEWSPAPERS *RESULTS*

Preferred Media to Receive News About: *News About People in the Community*

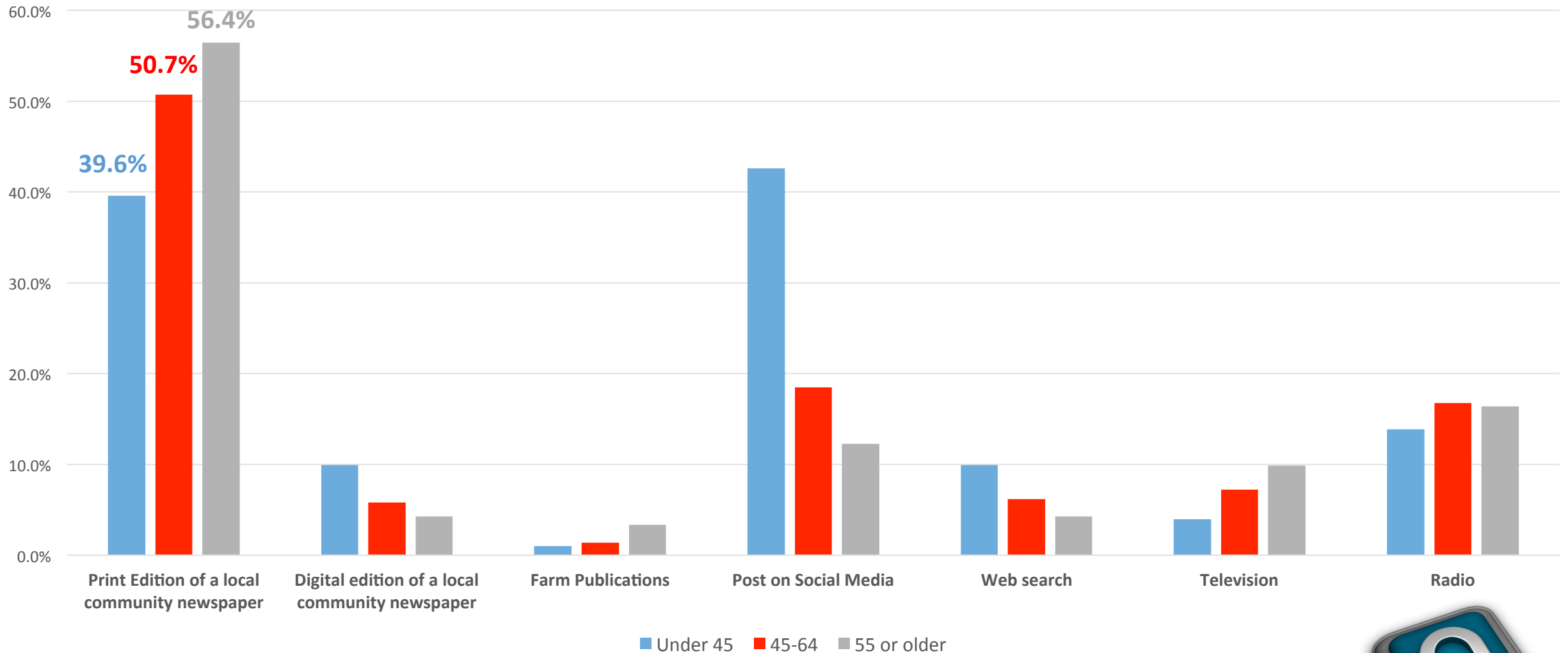


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Preferred Media to Receive News About: *Local Community Events*

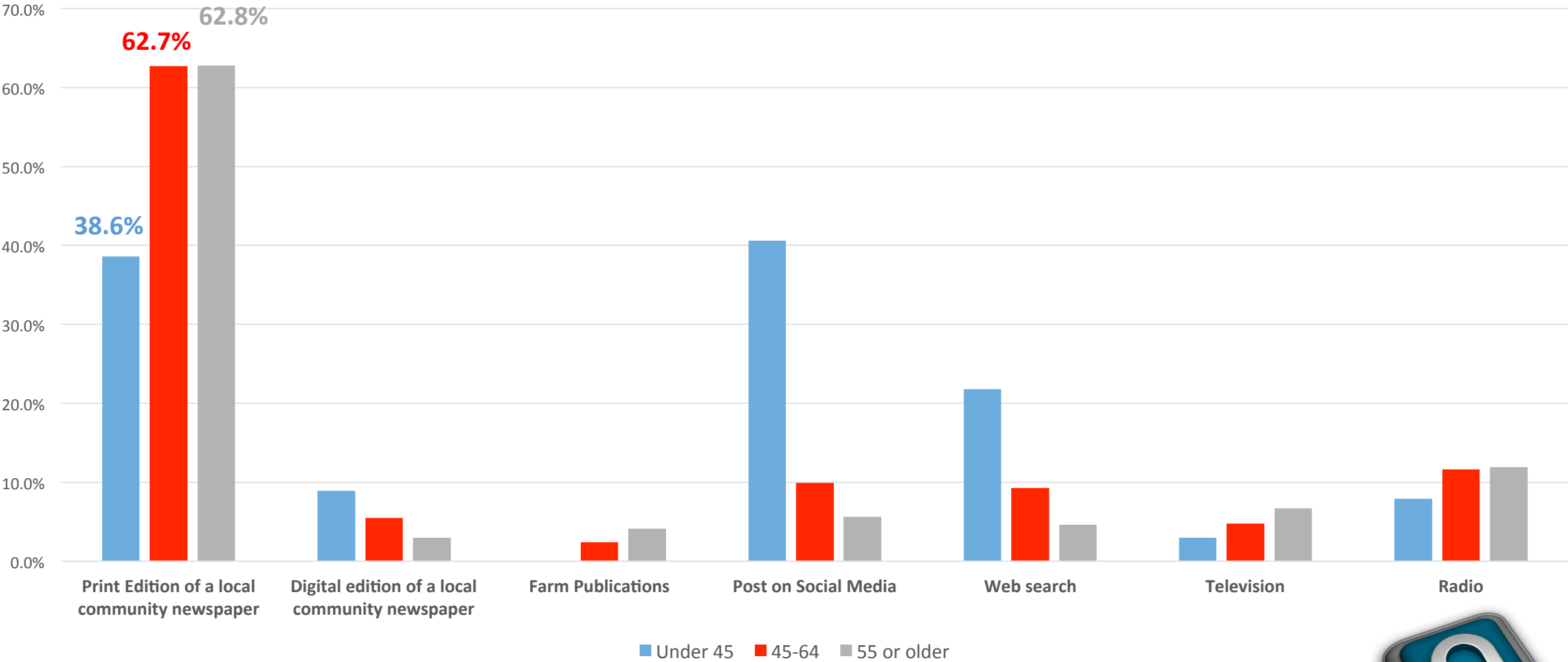


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COMMUNITY NEWSPAPERS *RESULTS*



Preferred Media to Receive News About: *Local Businesses, Sales and Events*

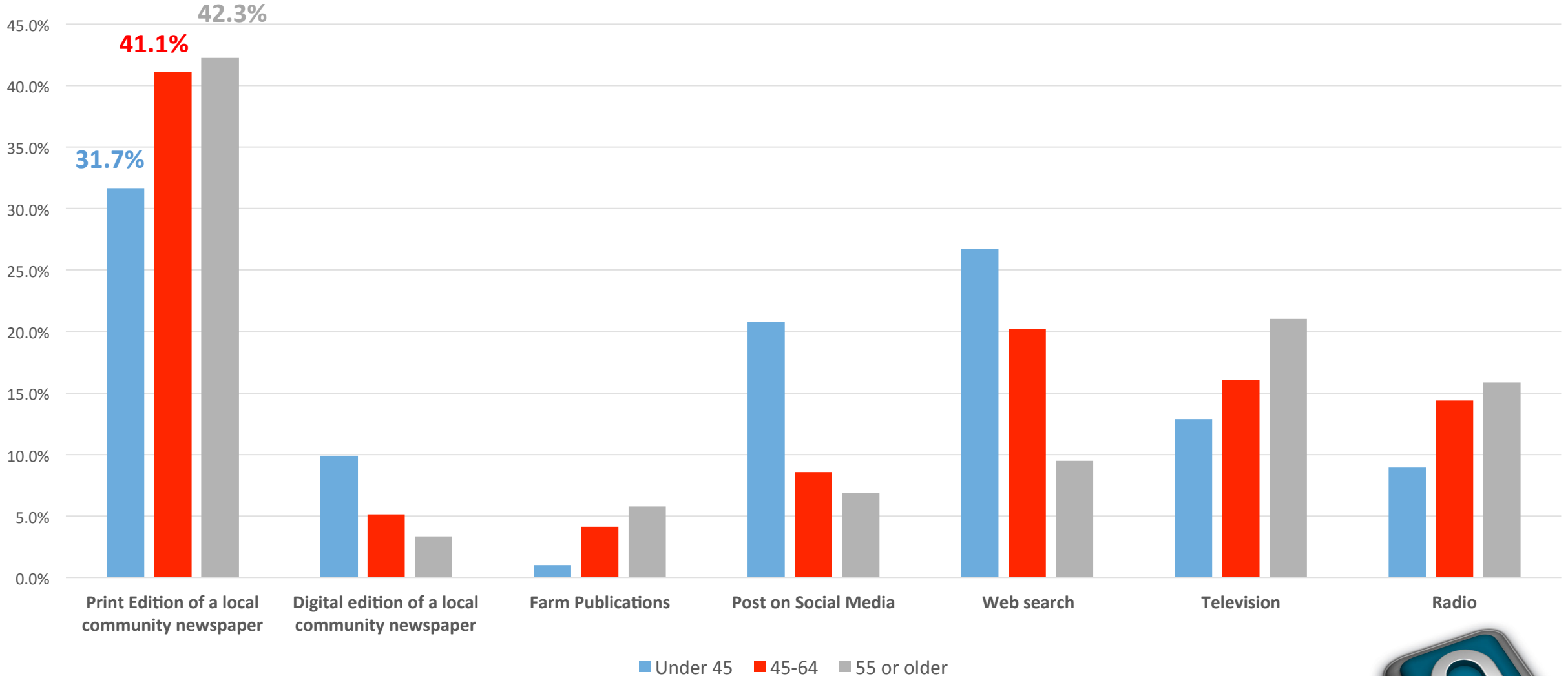


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Preferred Media to Receive News About: *Local Government Programs and Initiatives*

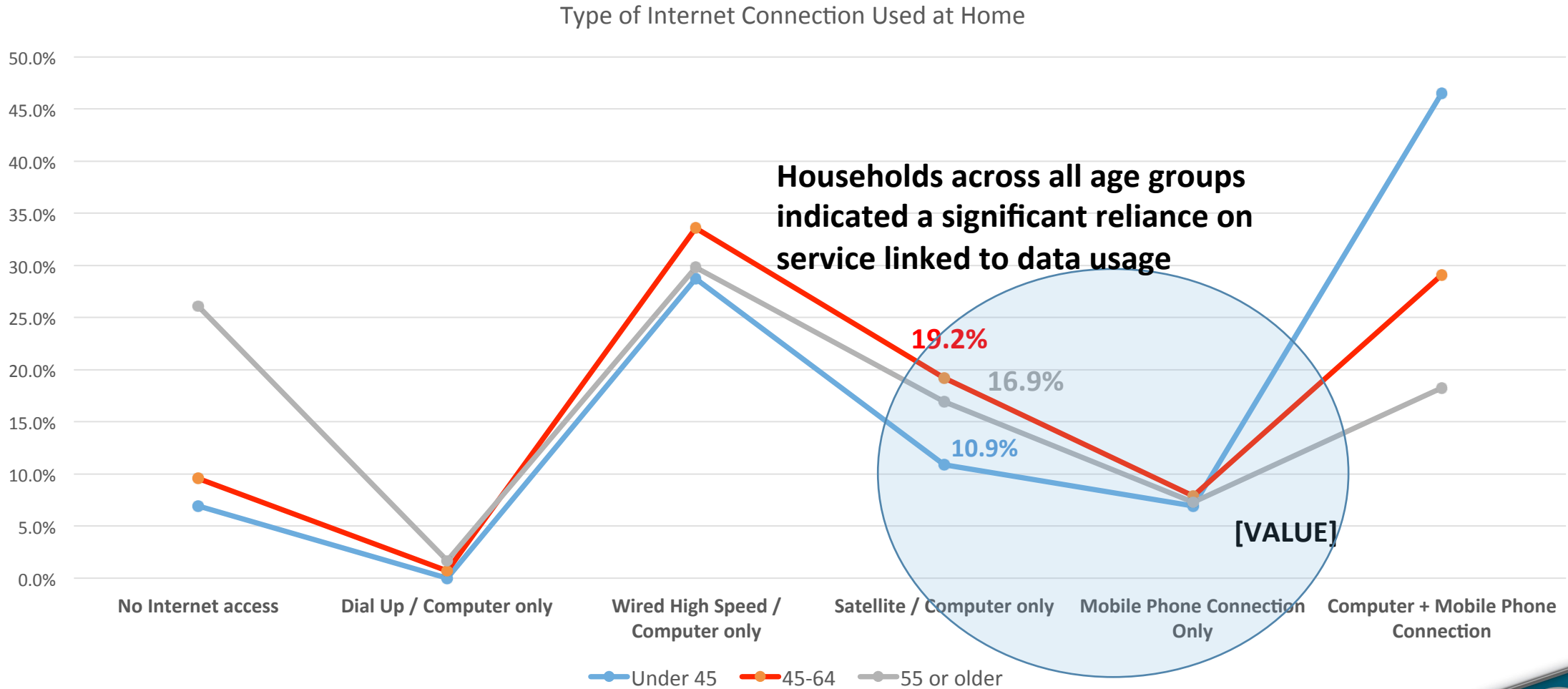


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COMMUNITY NEWSPAPERS *RESULTS*



Most Households Indicate Some Form of High Speed Internet Access, Although the Type of Service Varies



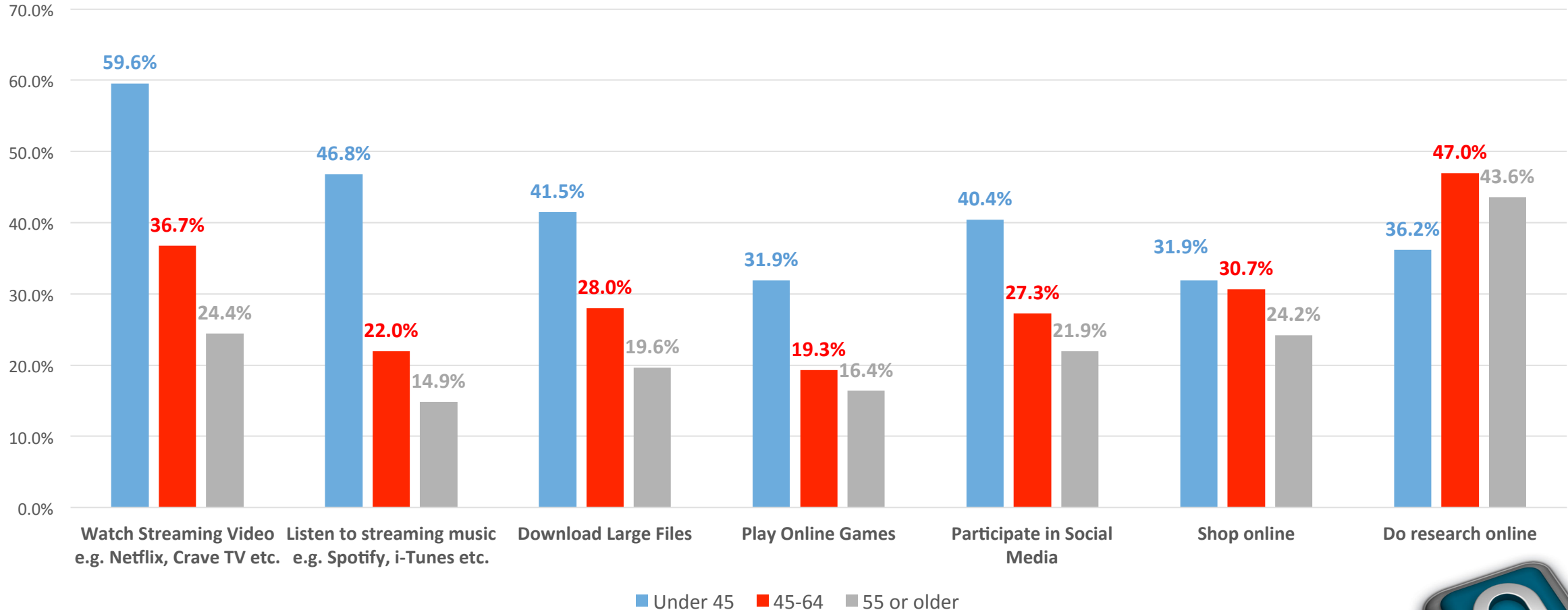
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COMMUNITY NEWSPAPERS RESULTS



However, Bandwidth Limits(Cost) on Certain Types of Service **Can and Does Restrict** Use on Some Activities

% of Respondents by Age Who Indicated Their Internet Connection Affected Their Ability to do Specific Online Activities



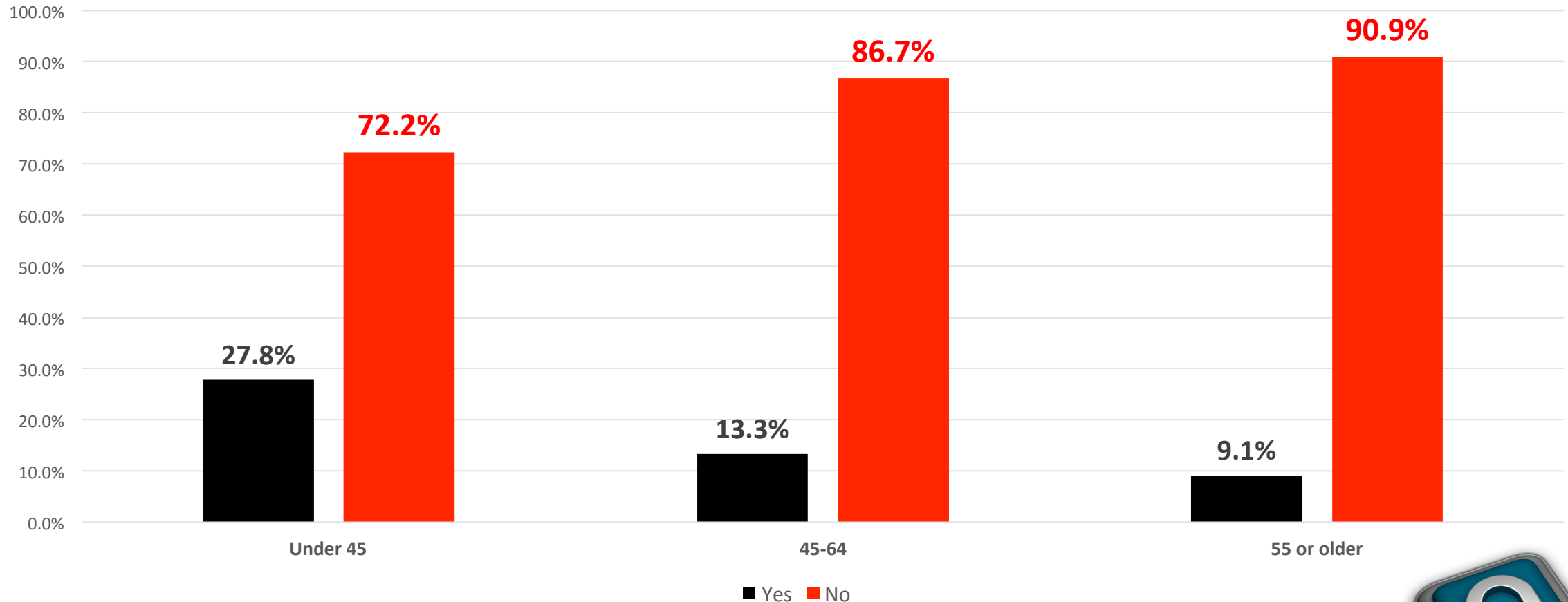
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COMMUNITY NEWSPAPERS *RESULTS*



Respondents Under 45 Were More Likely to Have Visited the Website of a Local Newspaper in the Last Week. While at 28%, the Number is Still Far Less Than Said They Read the Printed Version

Looked at the Website of a Local Community Newspaper in the Last Week



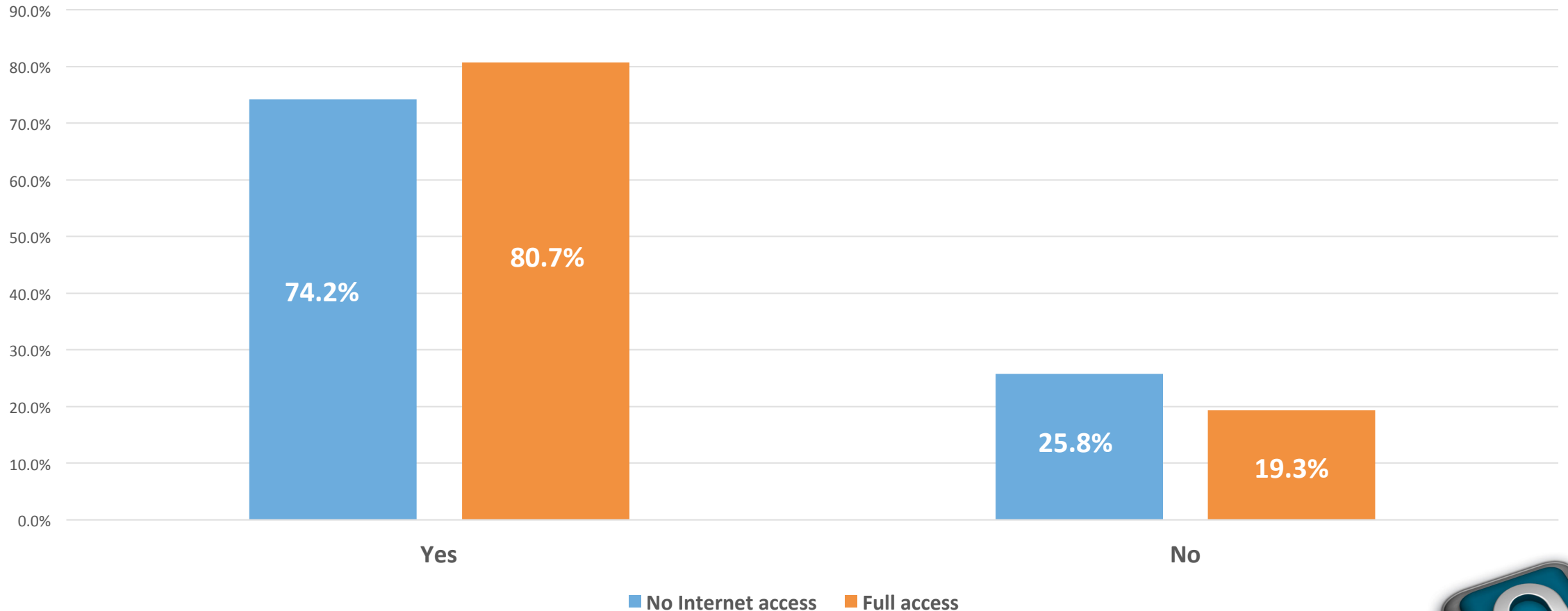
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COMMUNITY NEWSPAPERS RESULTS



People With Internet Access Are Actually **MORE LIKELY** to Have Read or Looked Into a Printed Community Newspaper in the Last Week Than People Without Internet Access

Read or Looked Into A Printed Community Newspaper in the Last Week by Internet Access at Home



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COMMUNITY NEWSPAPERS *RESULTS*



Trust in Media by Media Type and Age

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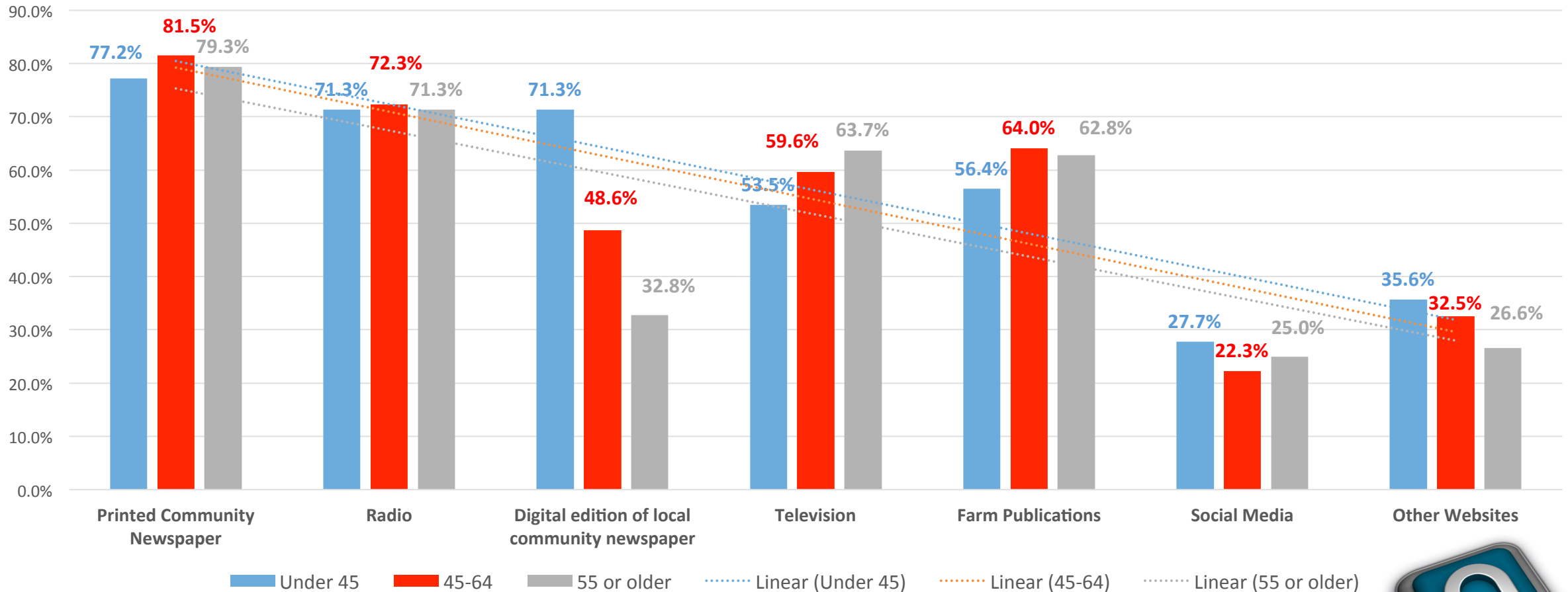
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Across All Age Categories, Respondents Indicate Significant Trust in Traditional Media. Trust Lessens with Online Media Platforms

Trust Media Type Either 'Somewhat' or 'Very Much'



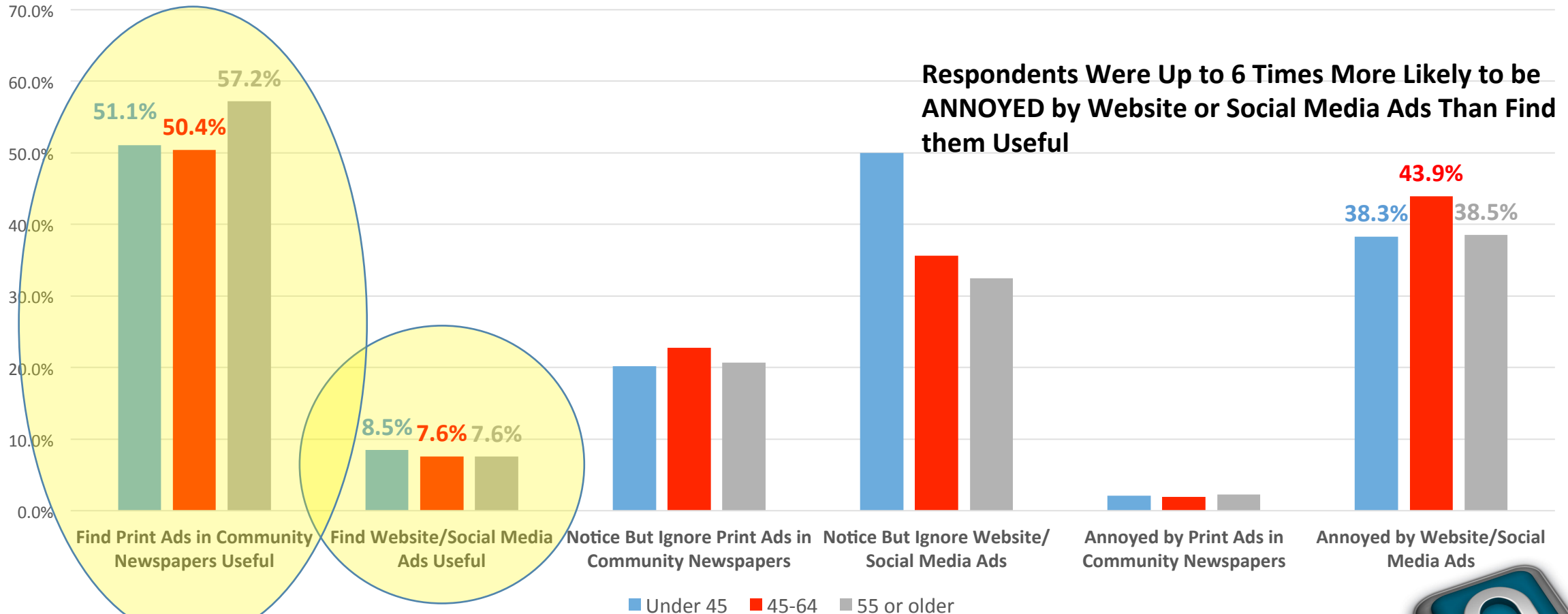
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A Significantly Higher % of Respondents in All Age Groups Found Print Ads Useful

Feelings About Advertising in Print VS Online



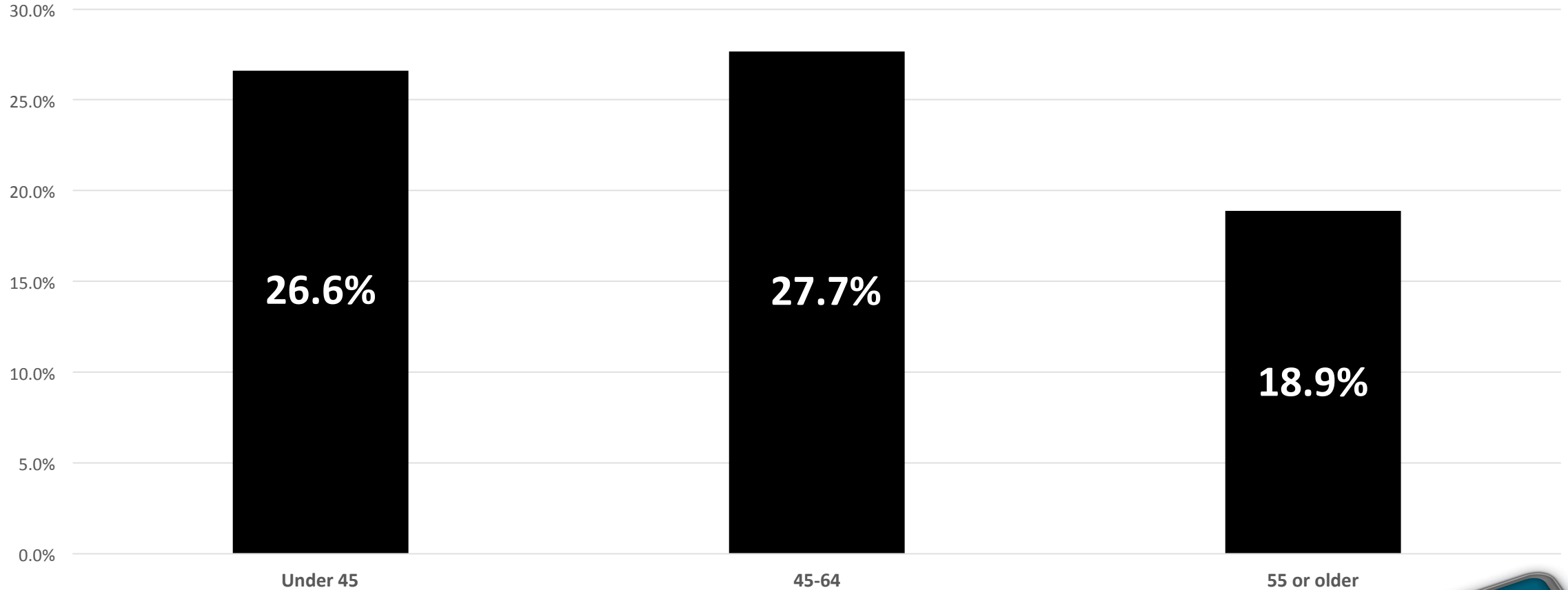
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One Out of Every Four Respondents in the Under 45 and 45-64 Categories Indicated That They Have an AdBlocker Installed on a Device to Block Unwanted Ads

Use an AdBlocker on a Device to Block Ads



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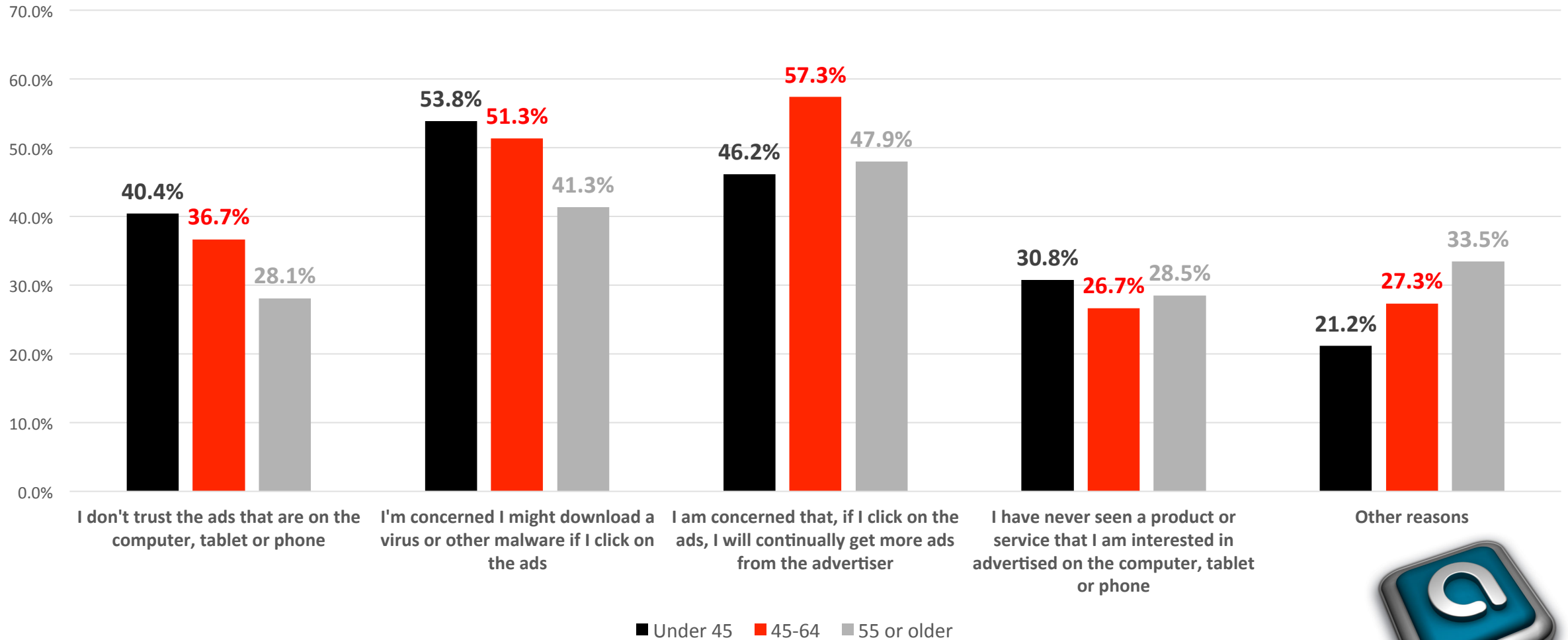
COMMUNITY NEWSPAPERS *RESULTS*



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Downloading a Virus or Receiving More Ads From the Advertiser Were Given as the Main Reasons for NOT CLICKING on Ads Online By Respondents in All Age Groups

Reasons for Not Clicking on Website or Social Media Ads



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Media Containing Ads Most Likely to Inspire Action (In-Store Visit, Website Visit, Purchase Decision) by Age Group

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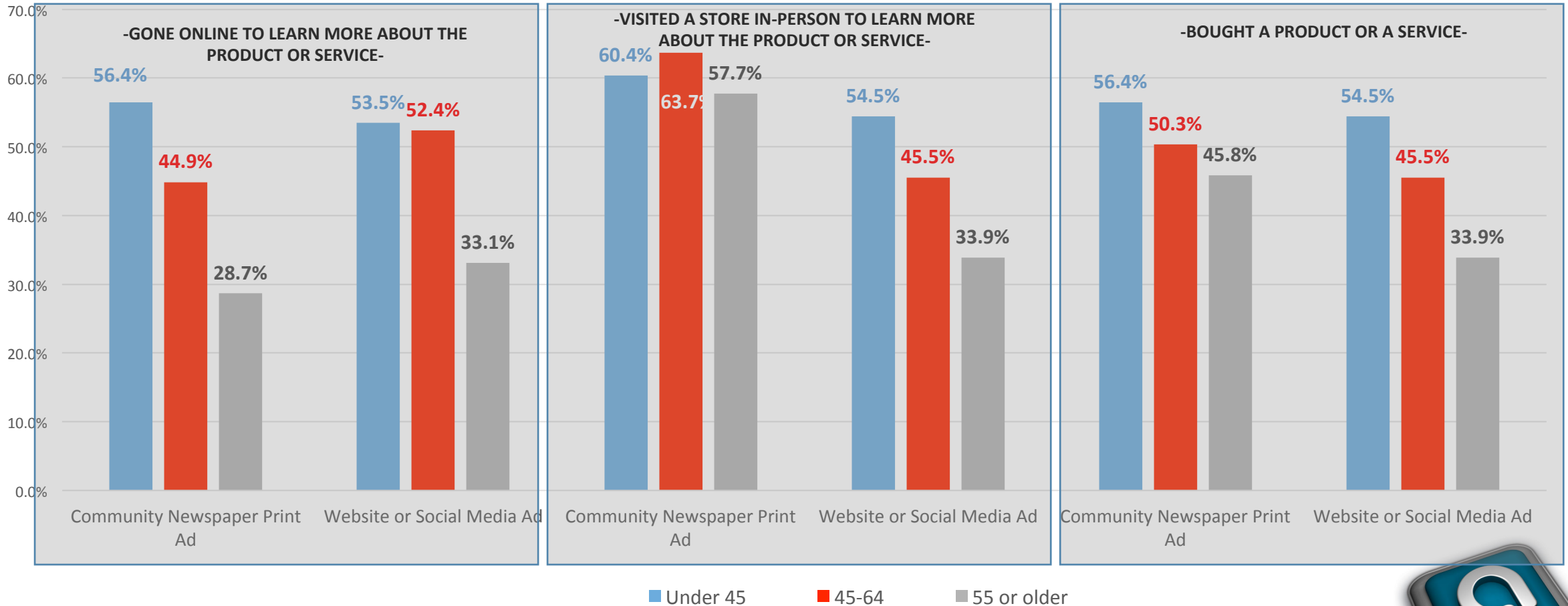
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Across All Age Groups, Respondents Indicated That Ads in Printed Community Newspapers Were More Likely to Drive Them Towards an In-Store Visit or the Purchase of a Product or Service Than Online Ads

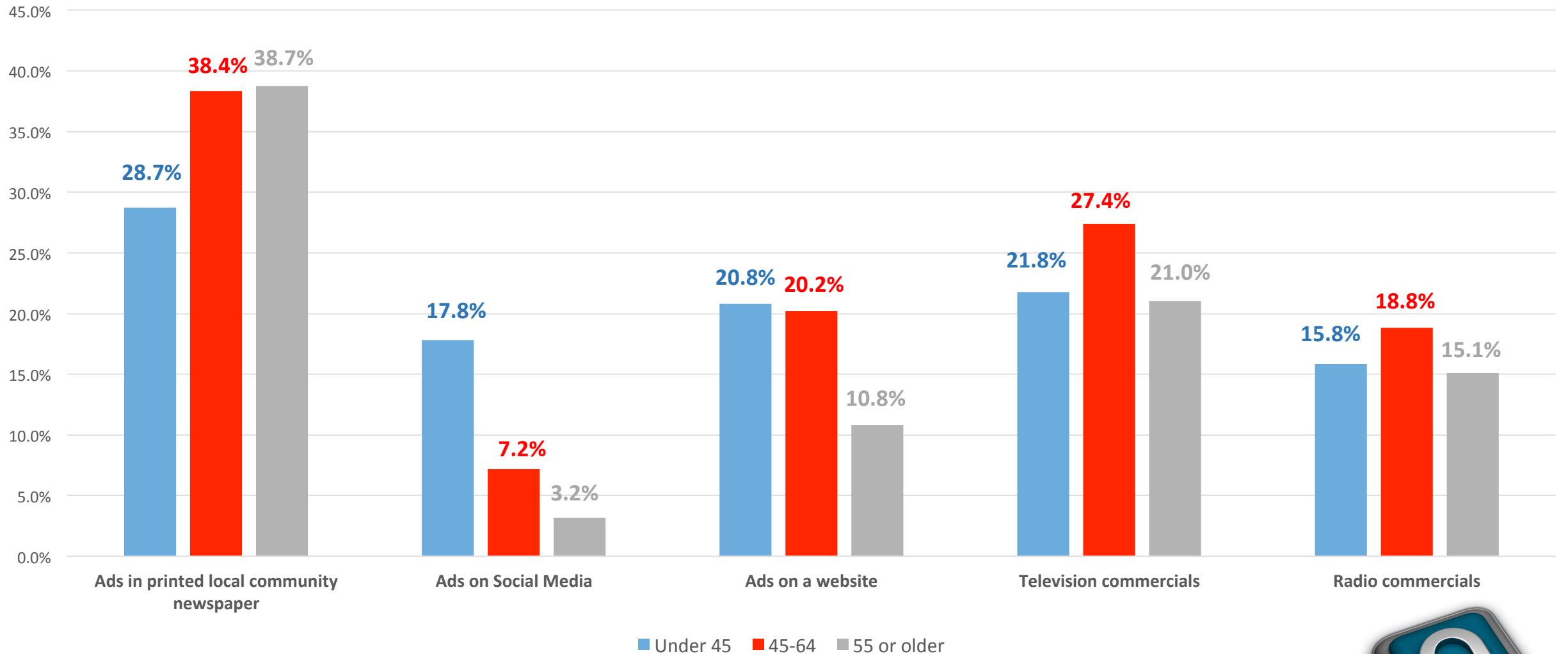
Actions Taken as a Result of an Ad



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COMMUNITY NEWSPAPERS RESULTS

Media Containing Ads Most Likely to Inspire Action (Store Visit, Website Visit, Purchase Decision): **AUTOMOTIVE**

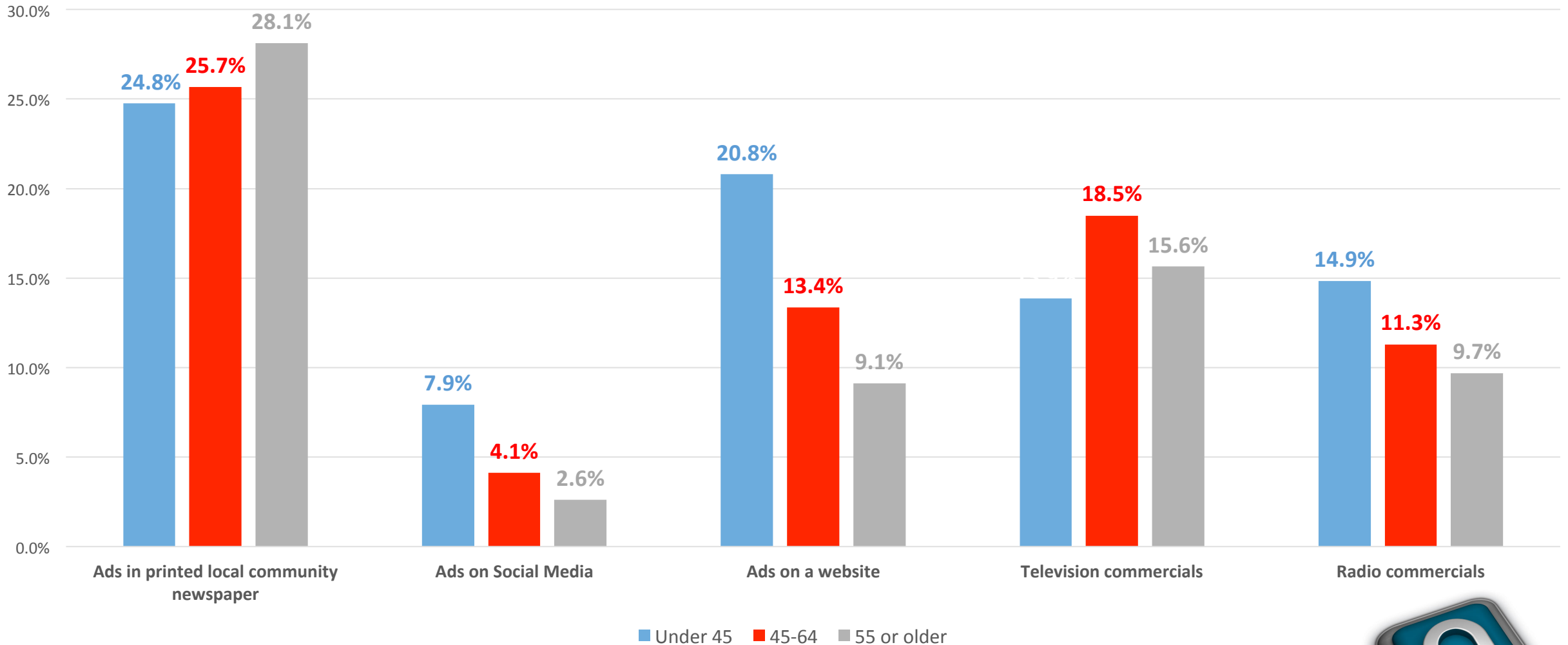


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Media Containing Ads Most Likely to Inspire Action (Store Visit, Website Visit, Purchase Decision): **FINANCIAL SERVICES**

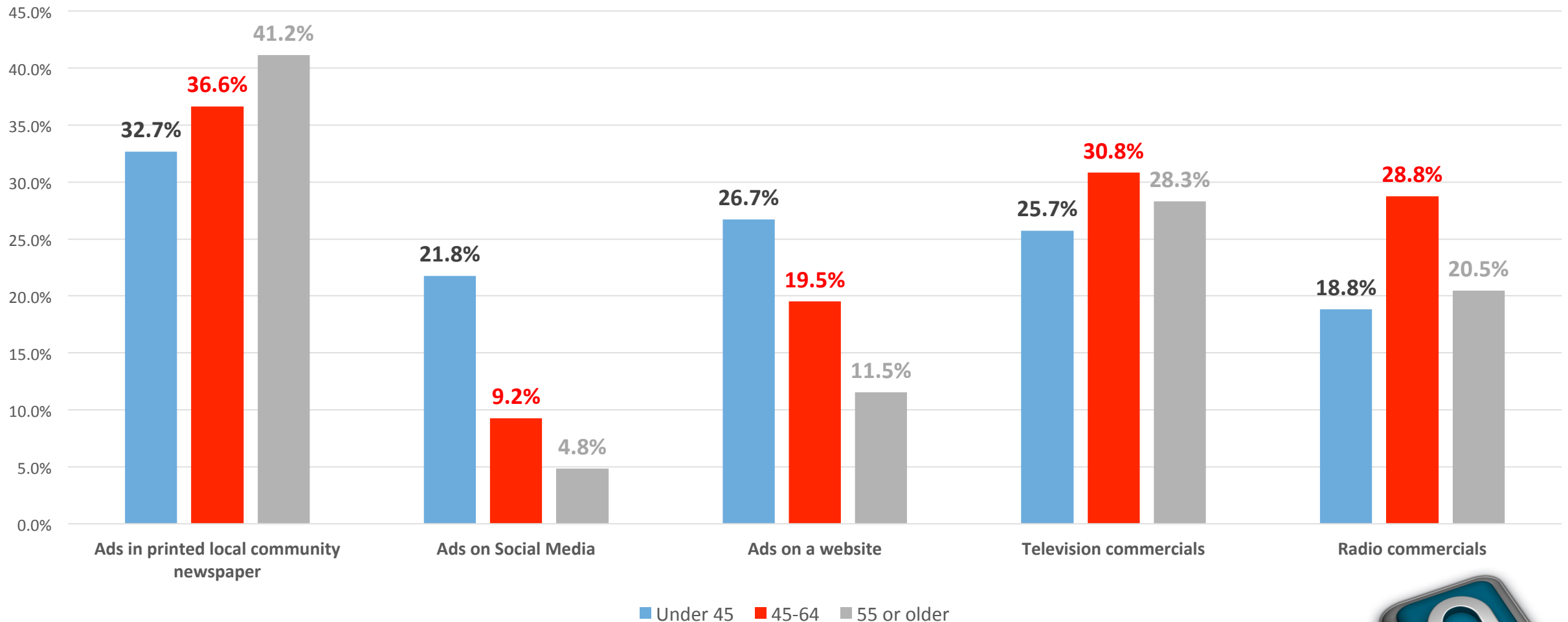


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COMMUNITY NEWSPAPERS *RESULTS*



Media Containing Ads Most Likely to Inspire Action (Store Visit, Website Visit, Purchase Decision): **GOVERNMENT SERVICES AND PROGRAMS**

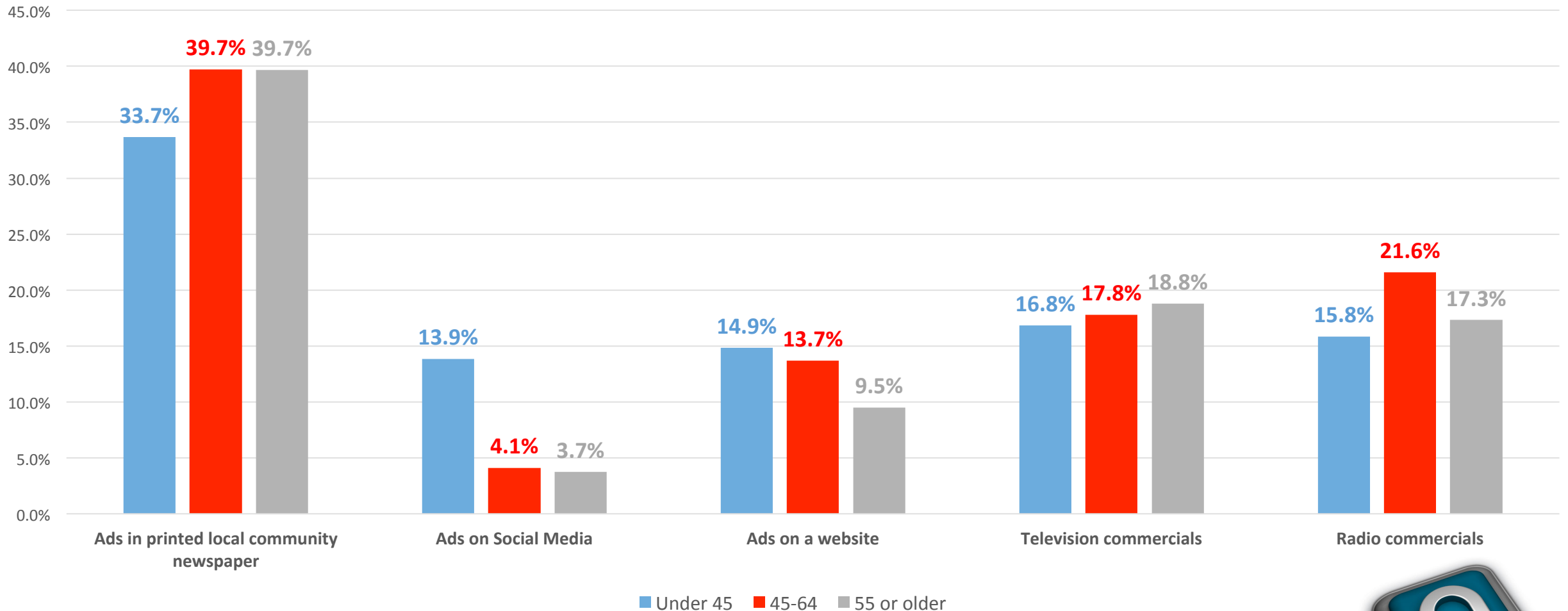


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Media Containing Ads Most Likely to Inspire Action (Store Visit, Website Visit, Purchase Decision): **AGRICULTURE AND AGRICULTURE SERVICES**

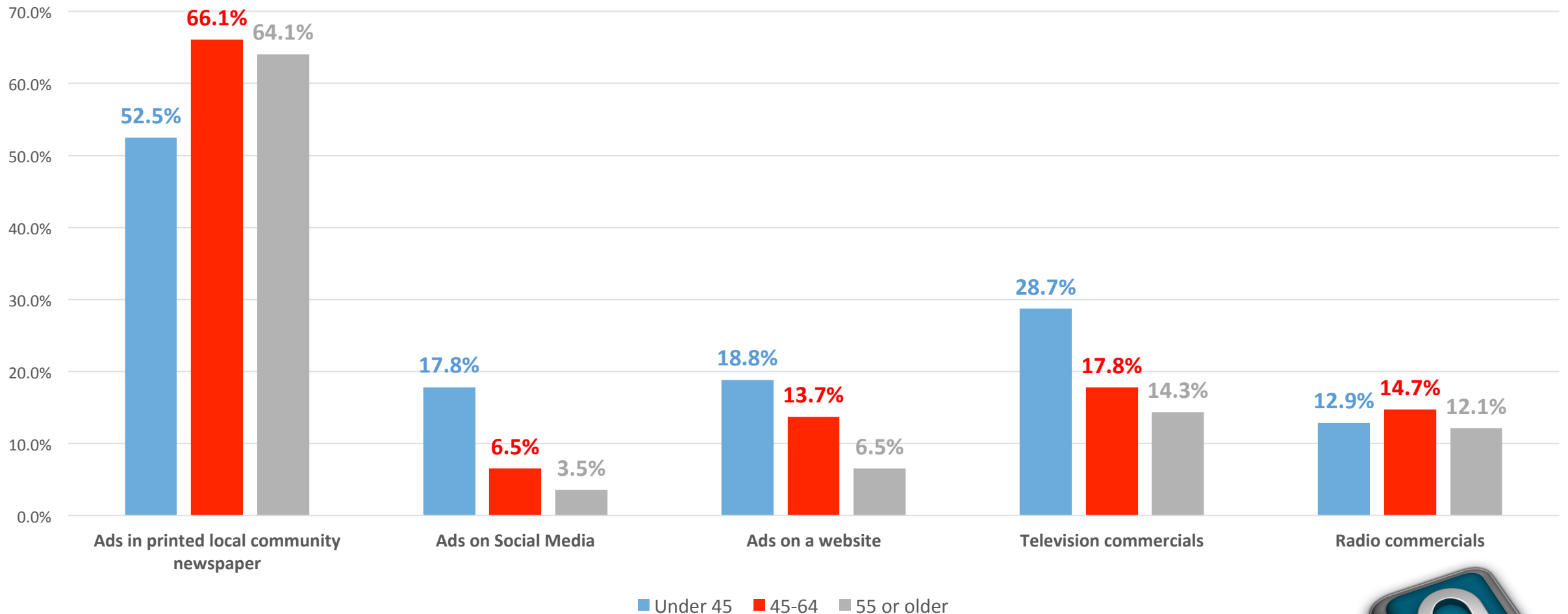


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COMMUNITY NEWSPAPERS **RESULTS**



Media Containing Ads Most Likely to Inspire Action (Store Visit, Website Visit, Purchase Decision): **FOOD AND GROCERIES**

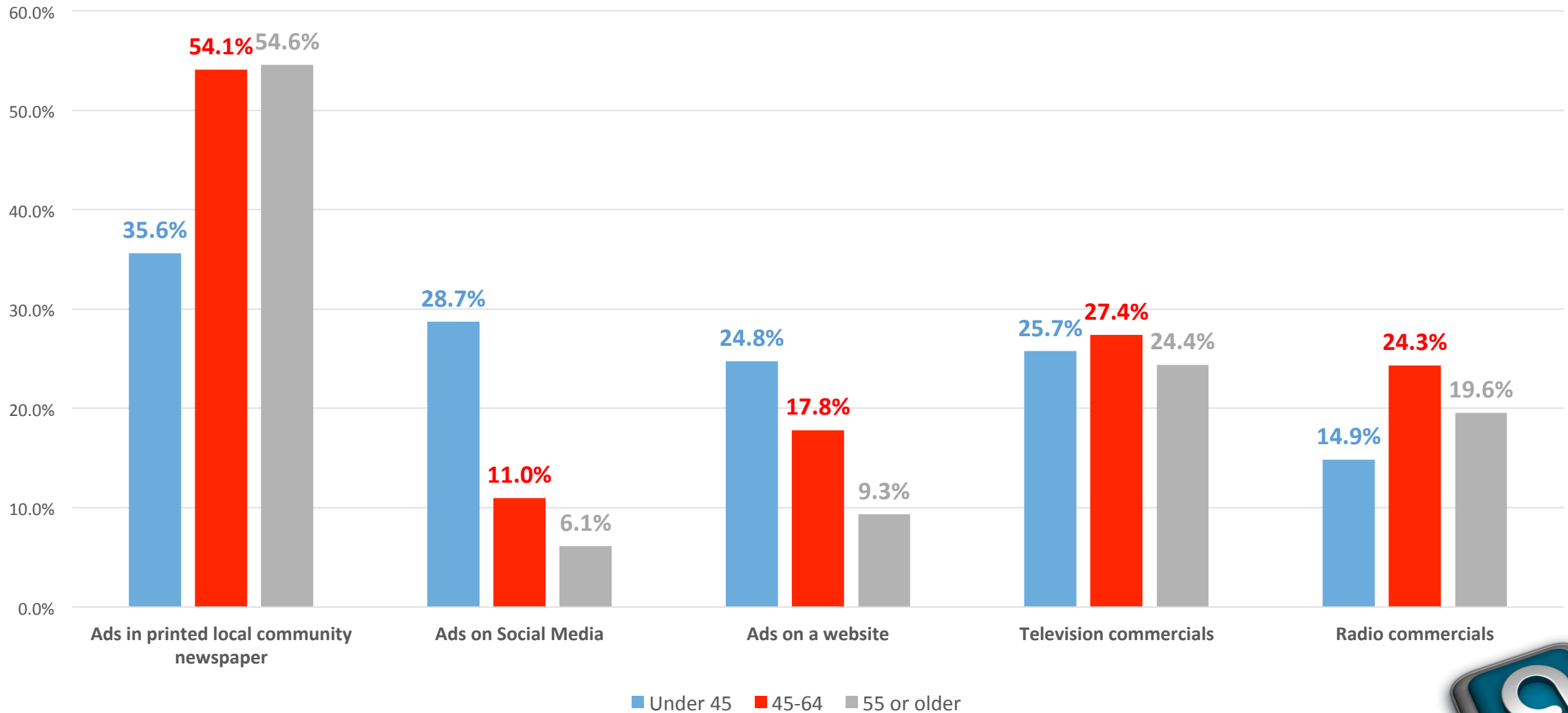


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Media Containing Ads Most Likely to Inspire Action (Store Visit, Website Visit, Purchase Decision): **RETAIL STORES**



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