

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.

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.

CITIES (10,000-50,000 POPULATION)

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

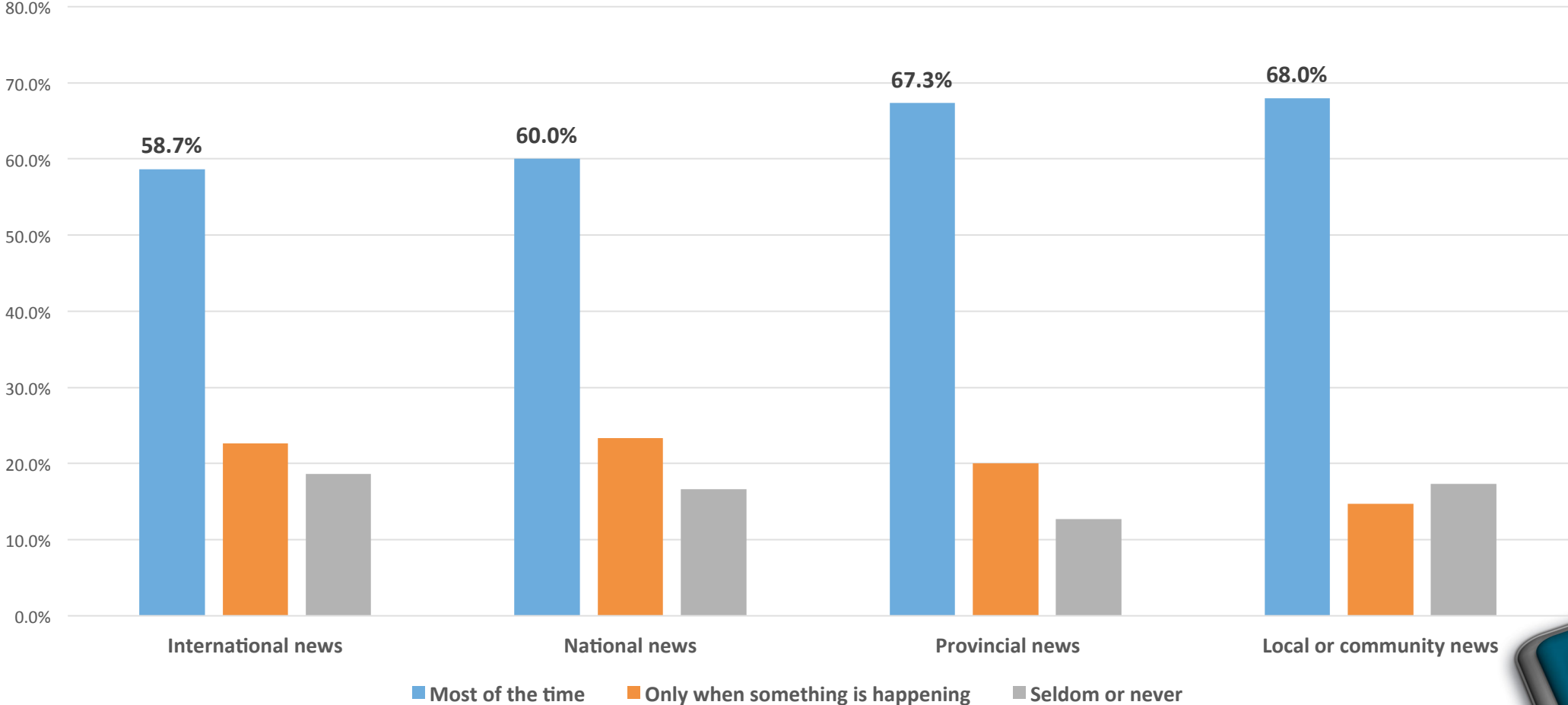
COMMUNITY NEWSPAPERS *RESULTS*



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NEWS REMAINS A STRONG PLATFORM WITH RESPONDENTS IN CITIES INDICATING THEY FOLLOW MOST TYPES OF THE NEWS 'MOST OF THE TIME'

Personally Follow Specific Types of News

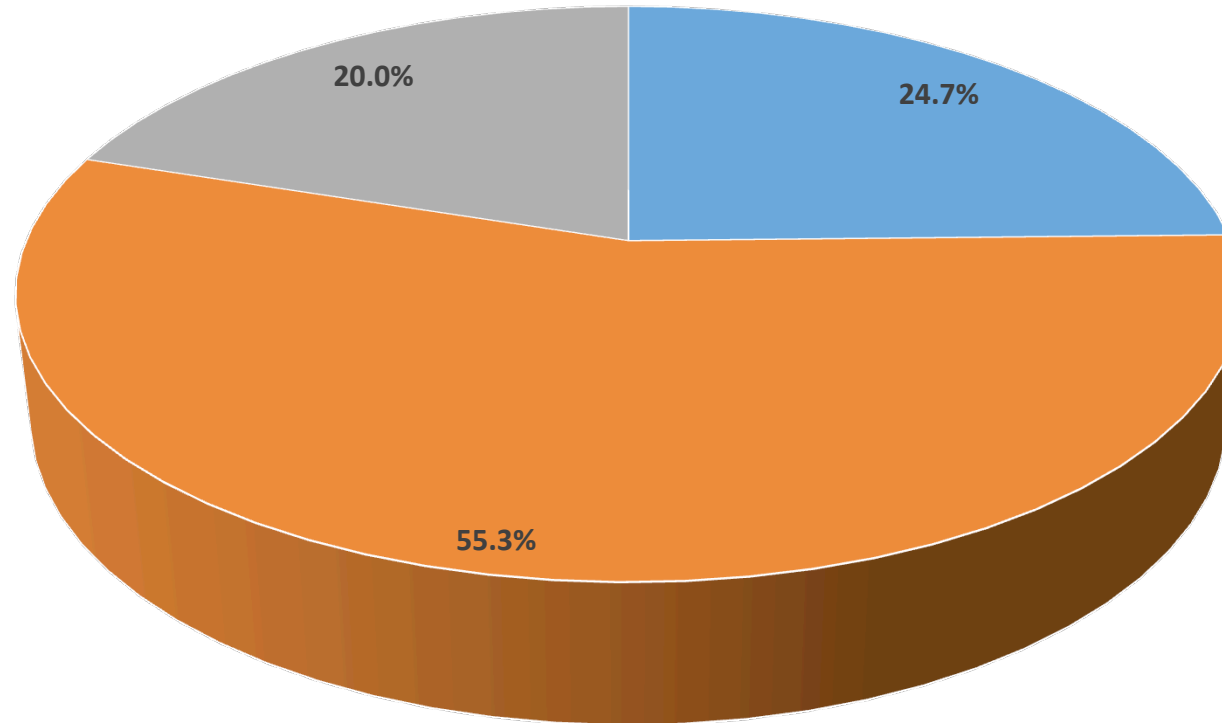


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COMMUNITY NEWSPAPERS RESULTS

THE MAJORITY OF RESPONDENTS IN CITIES INDICATE THEY SPEND ABOUT THE SAME AMOUNT OF TIME CONSUMING NEWS AS THEY DID 2 YEARS AGO. 25% SAID THEY ACTUALLY SPEND MORE TIME WITH NEWS TODAY

Time Spent With News Compared to Two Years Ago



■ More time per day ■ About the same amount of time ■ Less time per day

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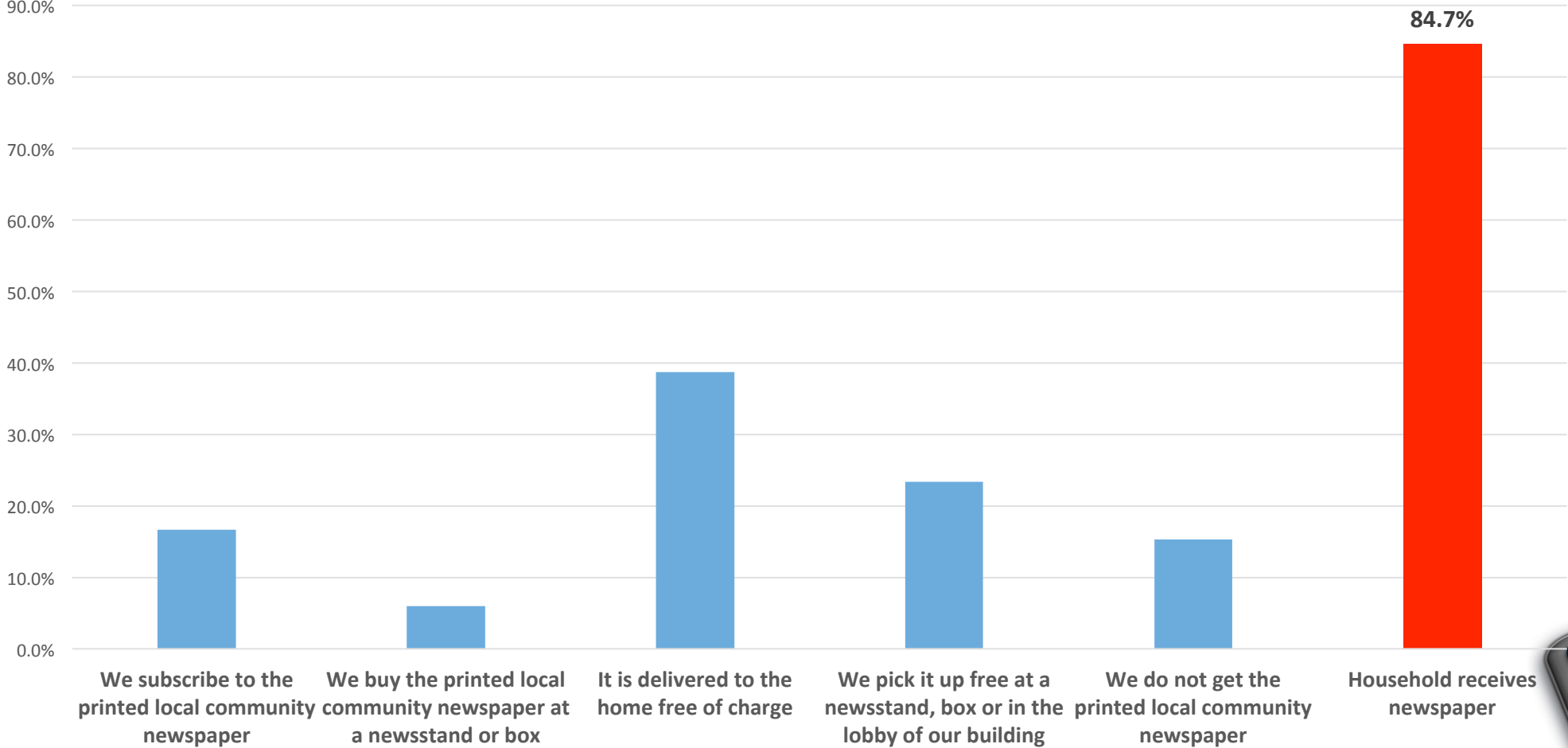
COMMUNITY NEWSPAPERS RESULTS



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IN 2018, 85% OF HOUSEHOLDS IN CITIES RECEIVE A PRINTED LOCAL COMMUNITY NEWSPAPER, AMONGST THE HIGHEST RECEIVERSHIP IN ALL COMMUNITY SIZES SAMPLED

Receivership of Local Printed Community Newspapers at Home

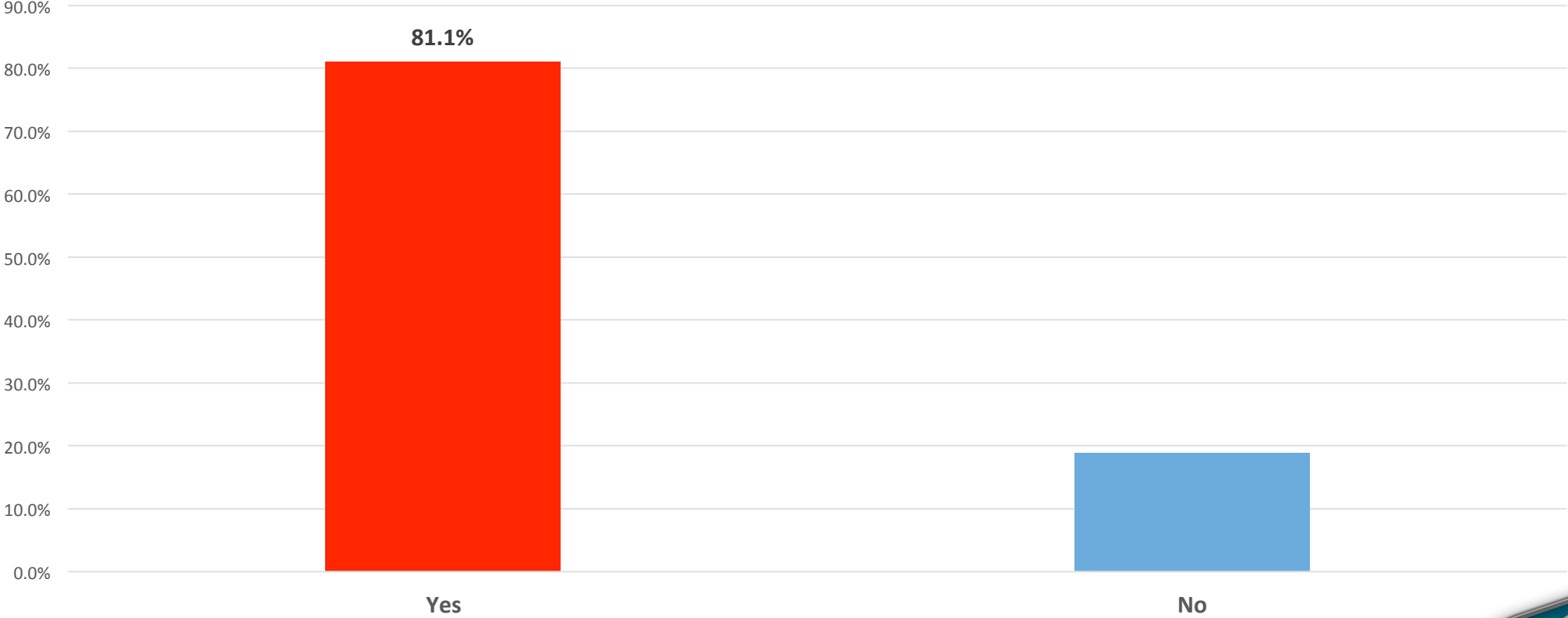


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COMMUNITY NEWSPAPERS RESULTS

MORE THAN FOUR IN FIVE RESPONDENTS IN TOWNS SAID THEY READ OR AT LEAST LOOKED INTO A PRINTED COMMUNITY NEWSPAPER IN THE LAST WEEK

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

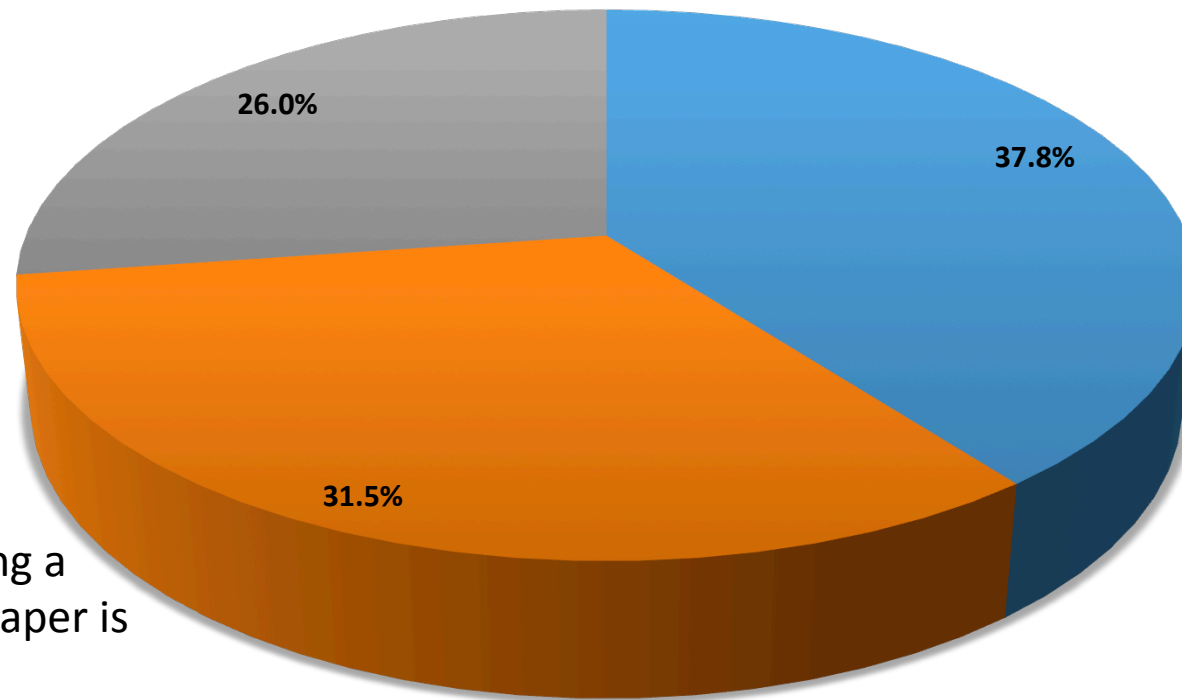


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COMMUNITY NEWSPAPERS *RESULTS*

Nearly 70% of Respondents in Cities Spend More Than 15 Minutes Reading the Printed Community Newspaper Each Week.
Nearly One Third Spend More Than 30 Minutes Reading Each Week.

Time Spent Reading Per Week



Average Time Spent Reading a Printed Community Newspaper is **19 Minutes**

■ 15 mins or less ■ 16-30 mins ■ More than 30 minutes

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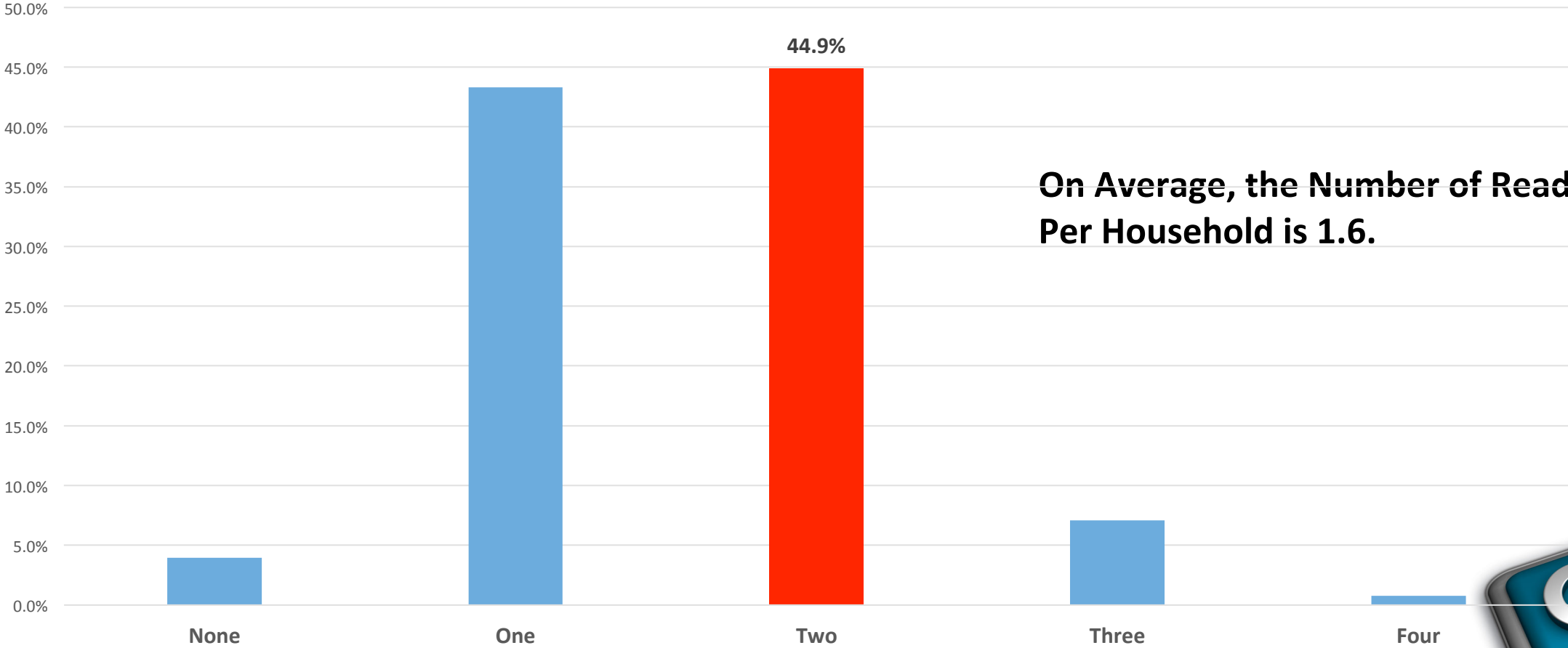
COMMUNITY NEWSPAPERS **RESULTS**



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In Nearly Half of Households in Cities, the Printed Community Newspaper is Read by Two People.

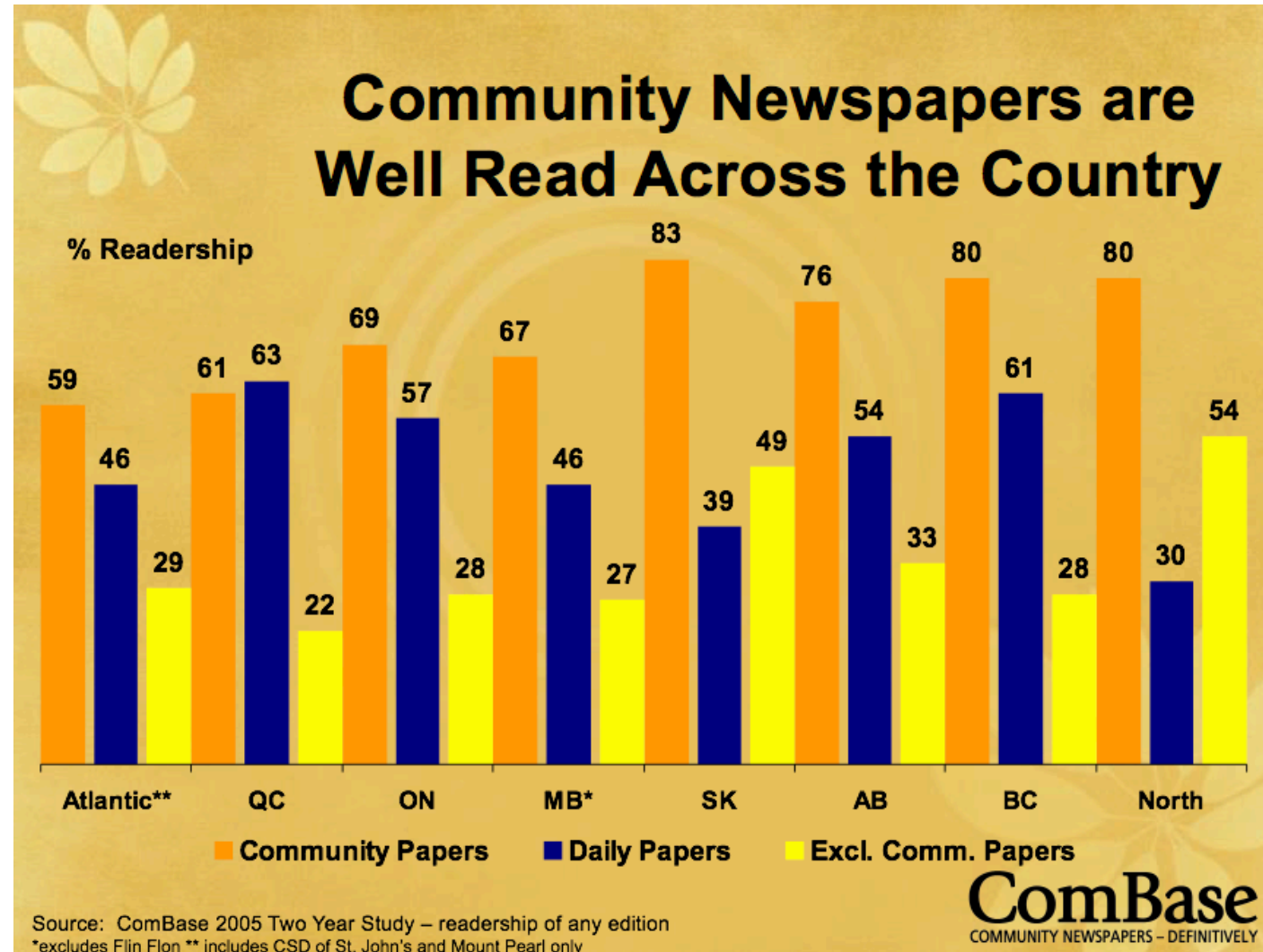
Number of People in the Household Who Typically Read or Look Into a Printed Community Newspaper Each Week



On Average, the Number of Readers Per Household is 1.6.



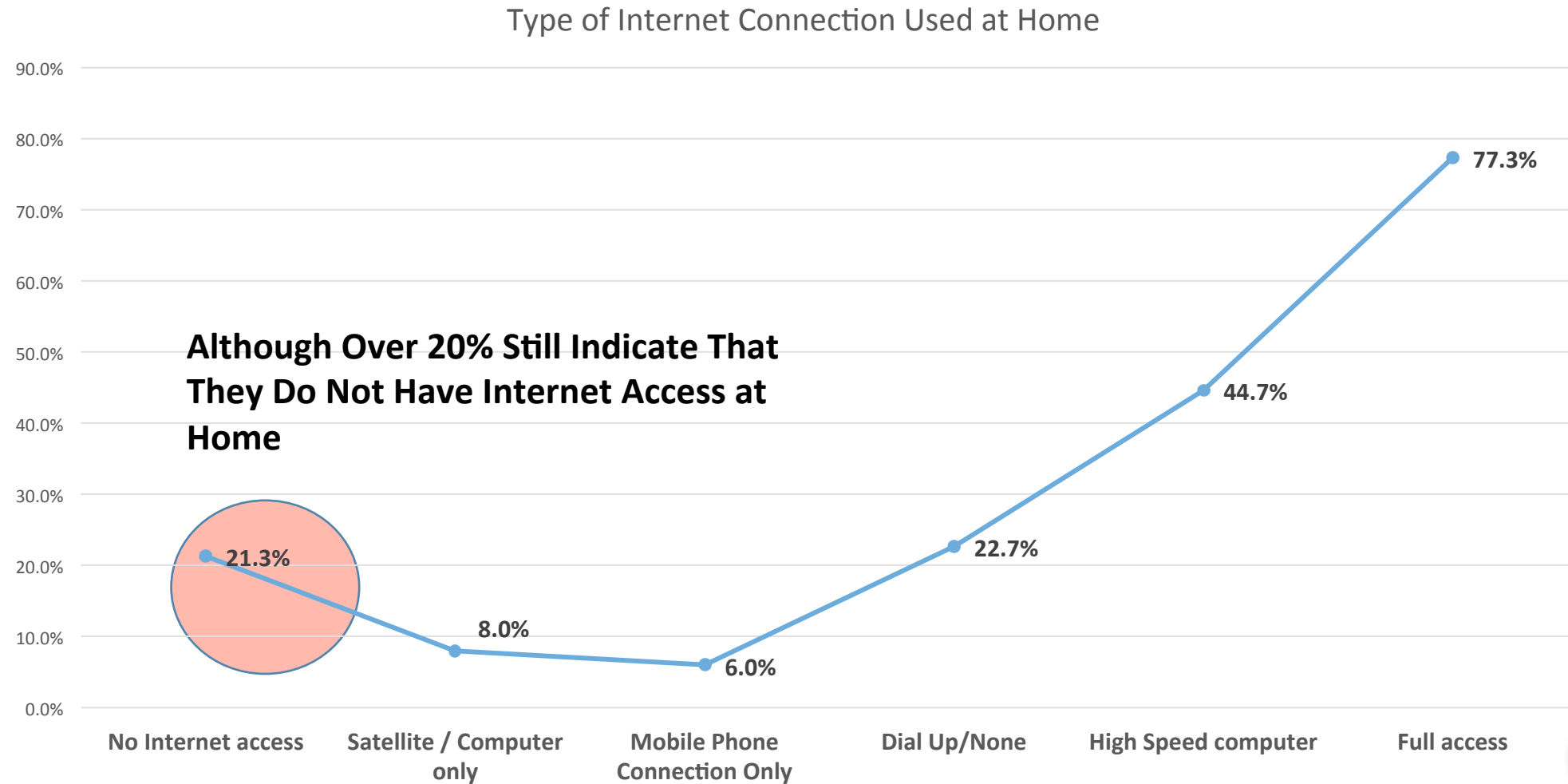
In 2005, the National Community Newspaper Readership Study (ComBase) Reported Readership of Community Newspapers in Manitoba of 67% and Saskatchewan 83%



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Most Households in Cities Indicate Some Form of Wired Internet Access, Although the Type of Service Varies



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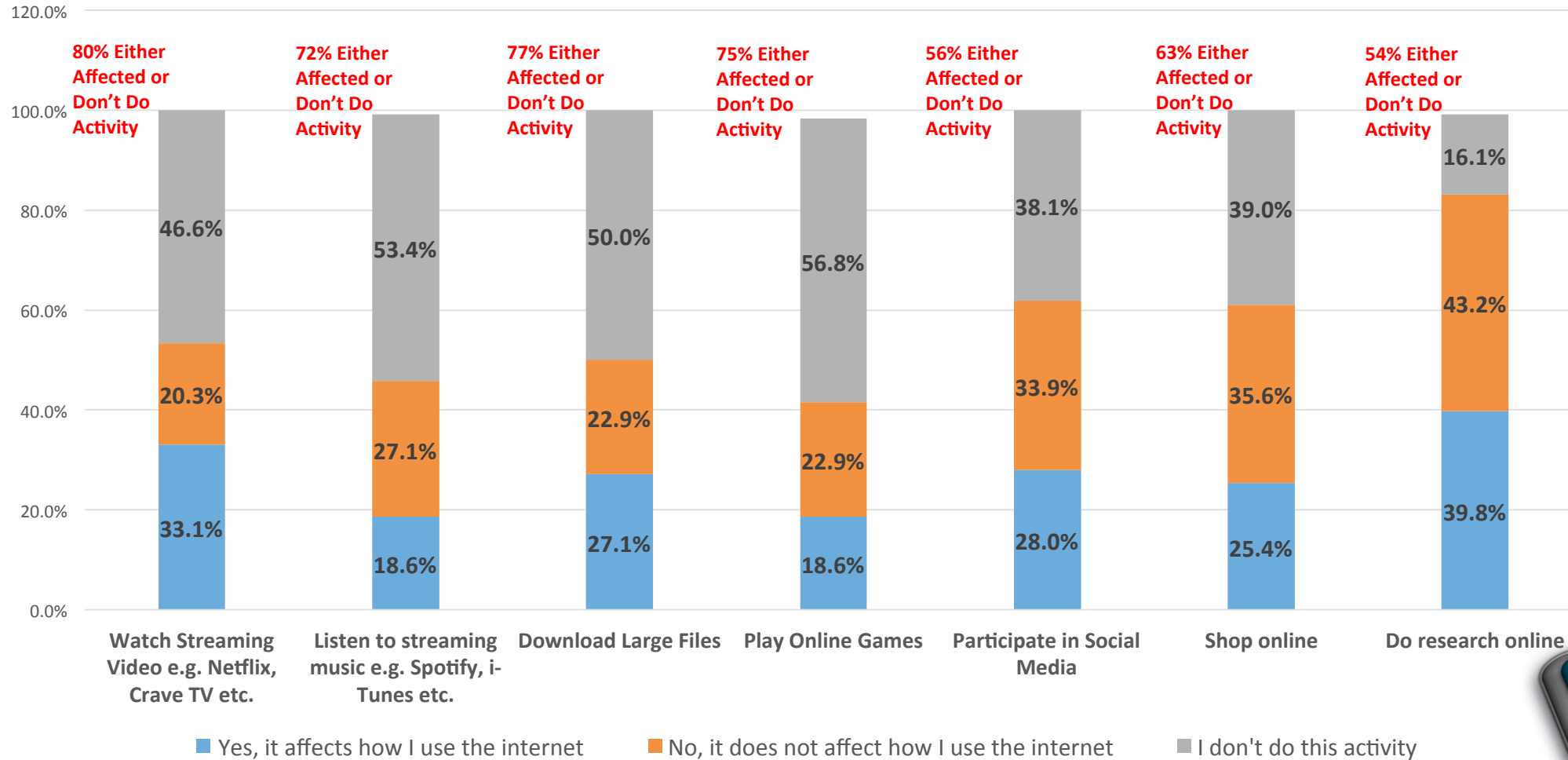
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However, Bandwidth Limits (Cost) on Certain Types of Service Can and Does Restrict Use on Some Activities, Although Less in Cities Than in Smaller Rural Communities

Does the Internet Connection You Have at Home Affect Certain Activities You Might do Online

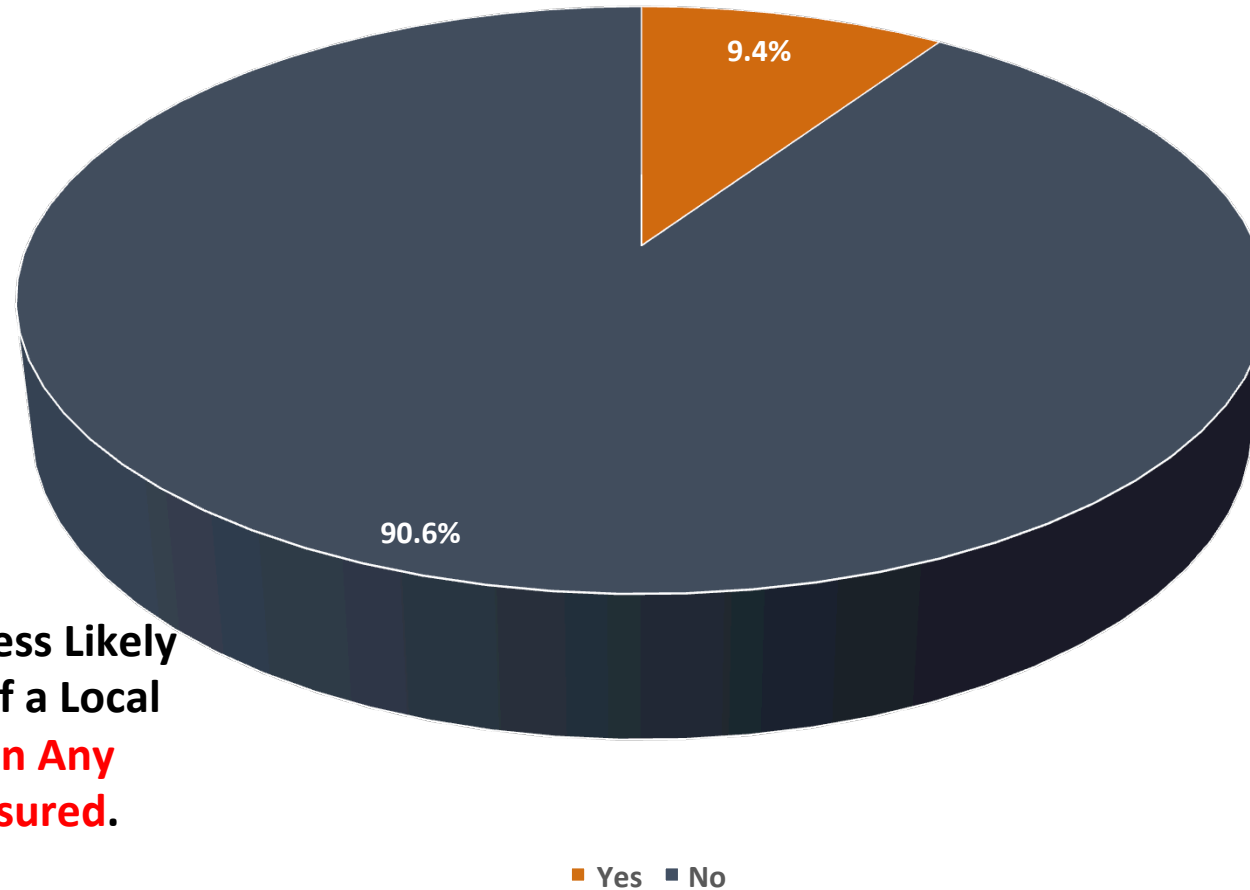


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COMMUNITY NEWSPAPERS RESULTS

Another Activity That Respondents in City Households Indicate That They Are Not Likely to be Doing is Visiting the Website of a Local Community Newspaper.

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



People Living in Cities Are Less Likely to be Visiting the Website of a Local Community Newspaper **Than Any Other Community Size Measured.**

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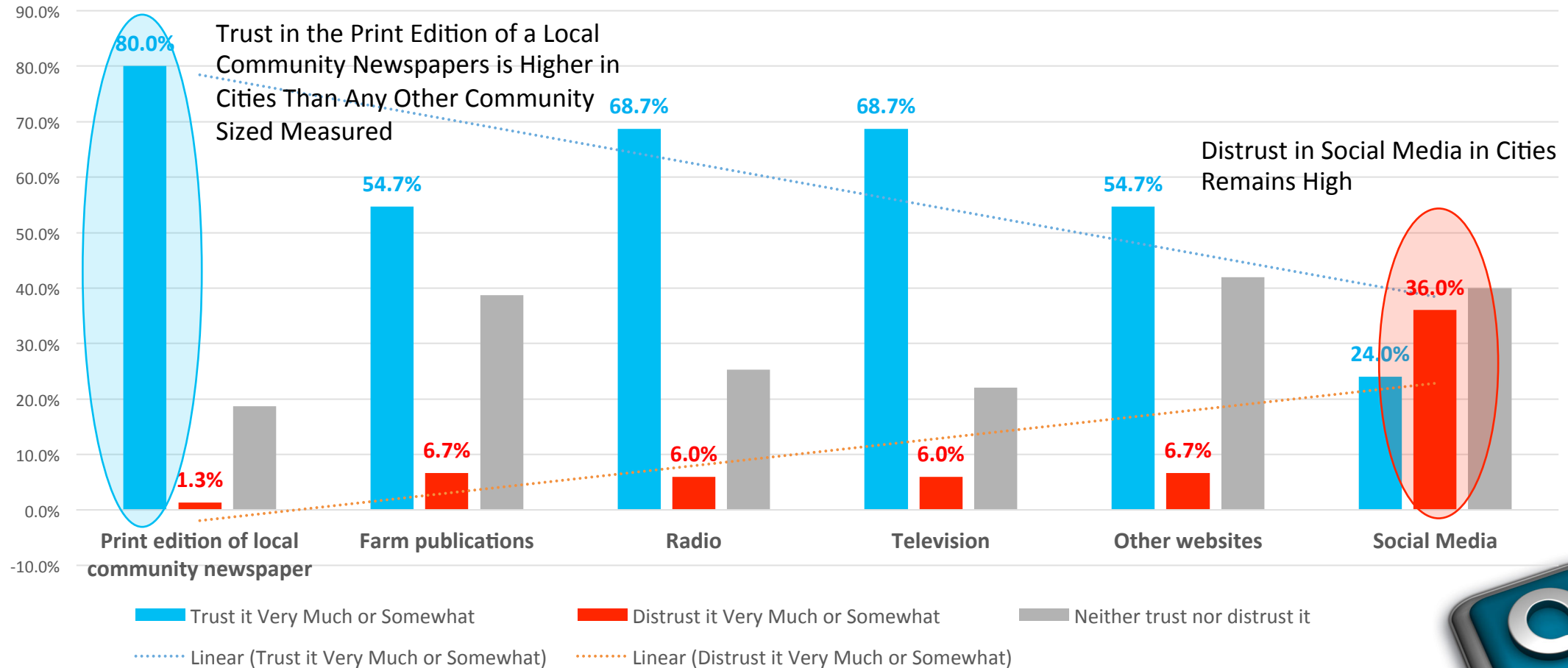
COMMUNITY NEWSPAPERS **RESULTS**



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Respondents in Towns Indicate Significant Trust in Traditional Media and Notable Levels of Distrust in Both Social Media and Other Websites

Trust in Media Platforms

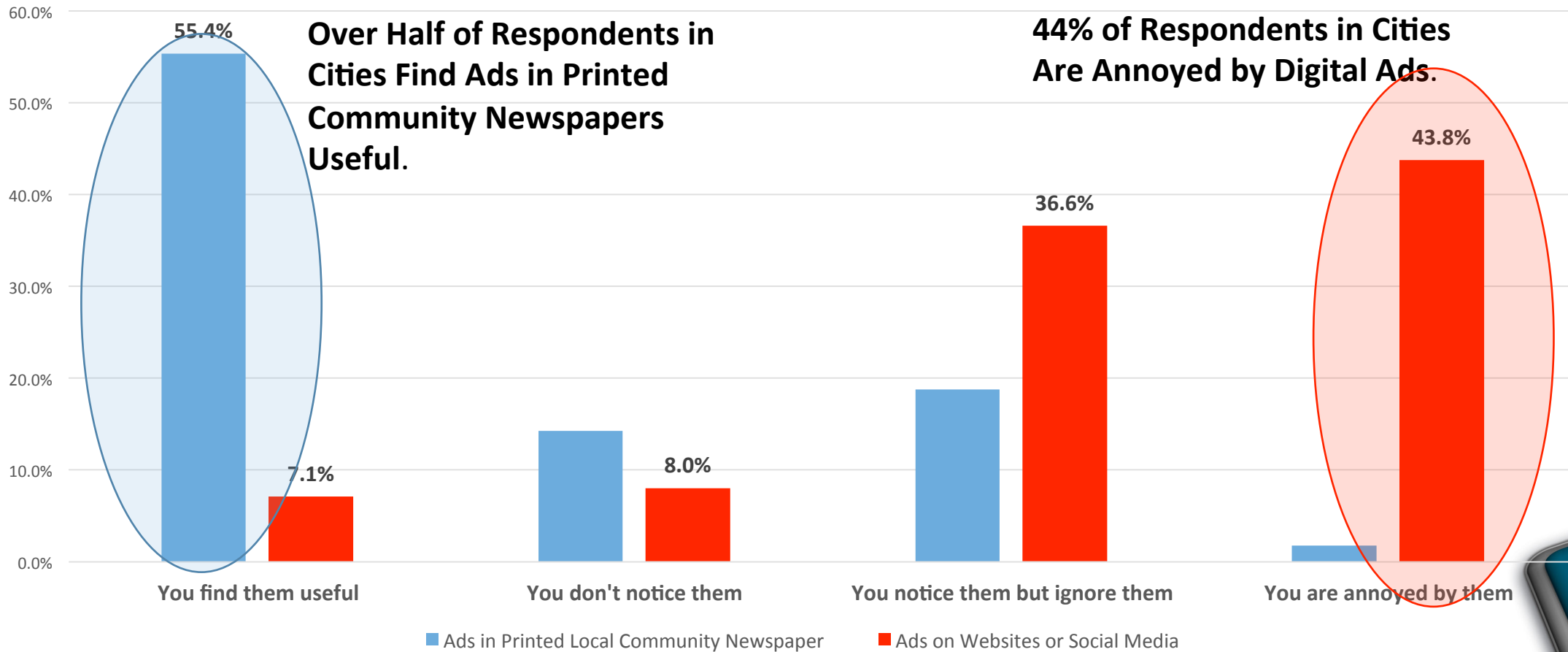


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COMMUNITY NEWSPAPERS RESULTS

Trust in News and Advertising Content of Printed Community Newspapers Leads to a Significantly Higher % of Respondents in City Households Finding Ads Useful Than Digital Forms of Advertising

How Do You Feel About Ads In Printed Community Newspapers VS Ads Online



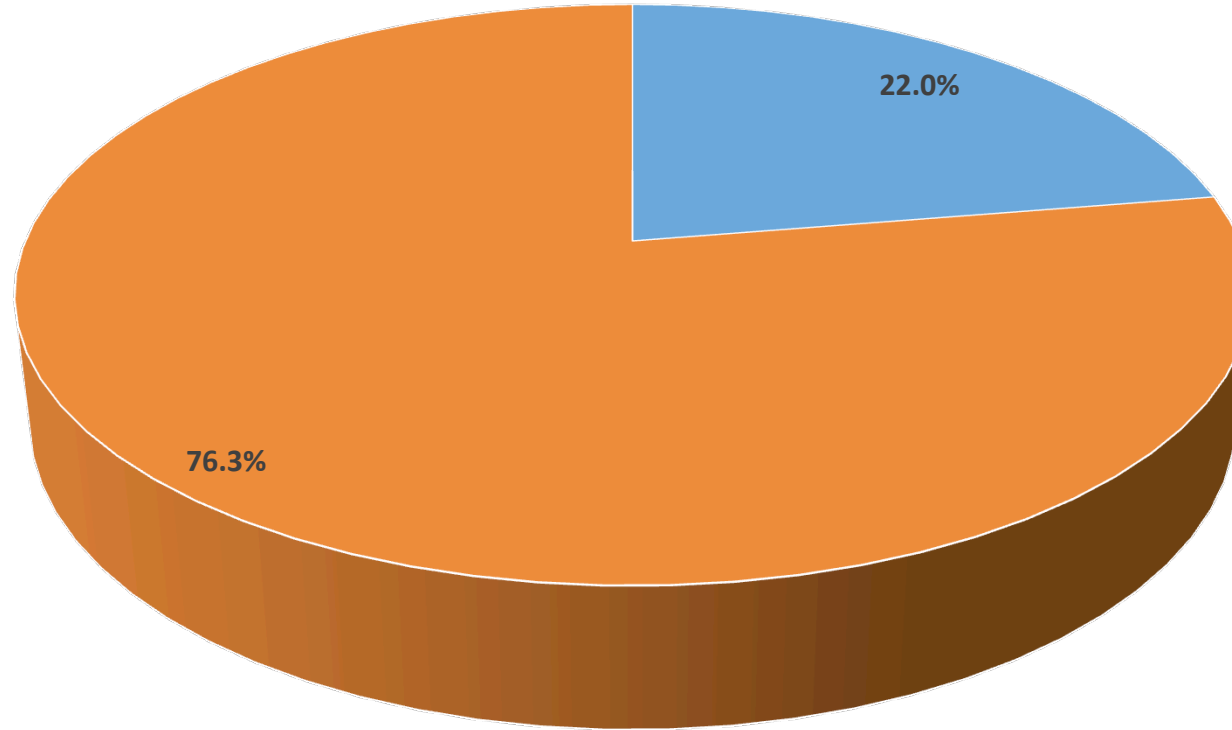
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COMMUNITY NEWSPAPERS RESULTS

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Nearly One Quarter of Respondents in Cities Report Usage of an AdBlocker on a Device to Block Online Ads. 1.7% Either Don't Know or Own a Device to Access the Internet

Use of AdBlockers on Devices to Access the Internet



■ Yes, use ad blocker ■ No, do not use ad blocker

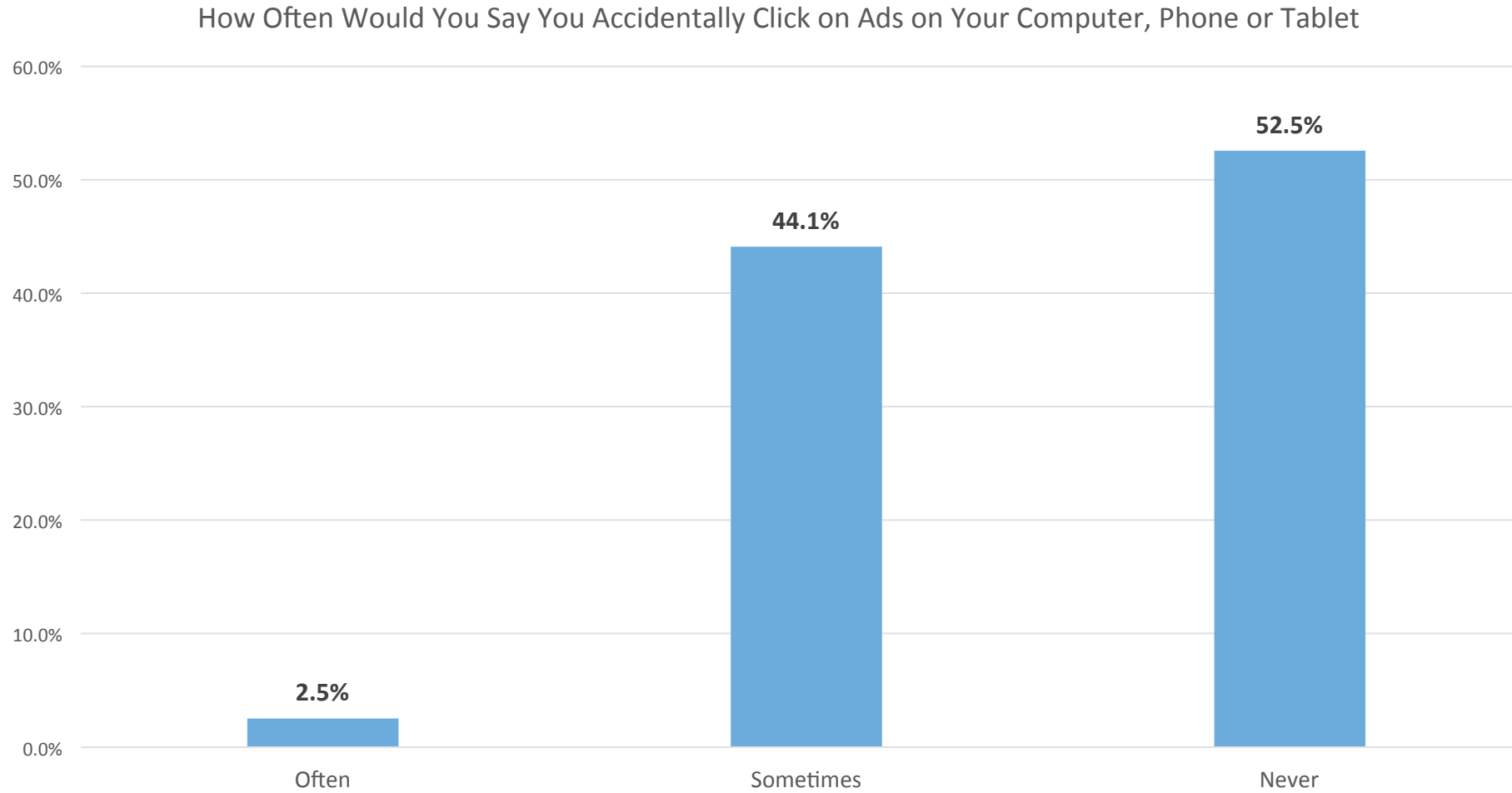
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47% of Respondents Said They Sometimes Click on Ads on Their Computer, Phone or Tablet Accidentally



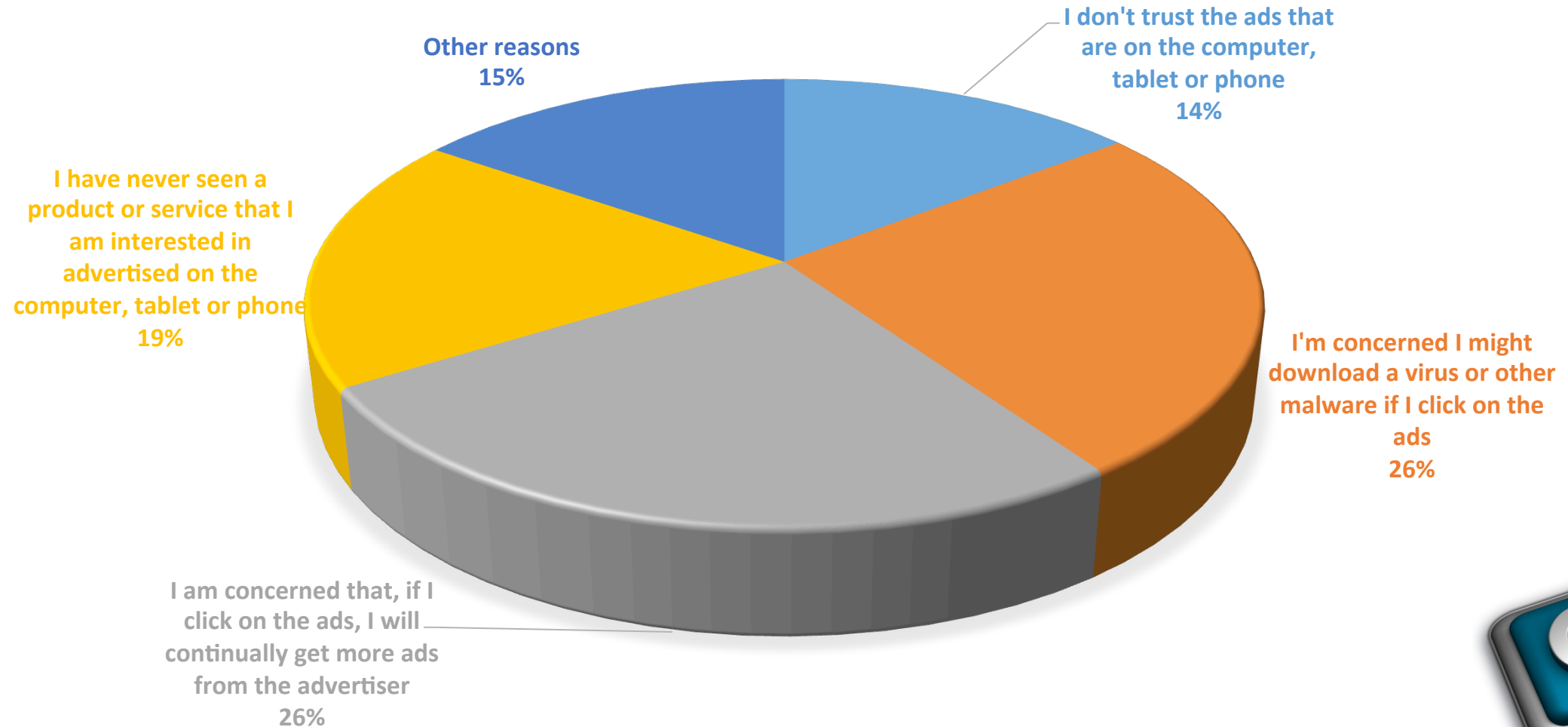
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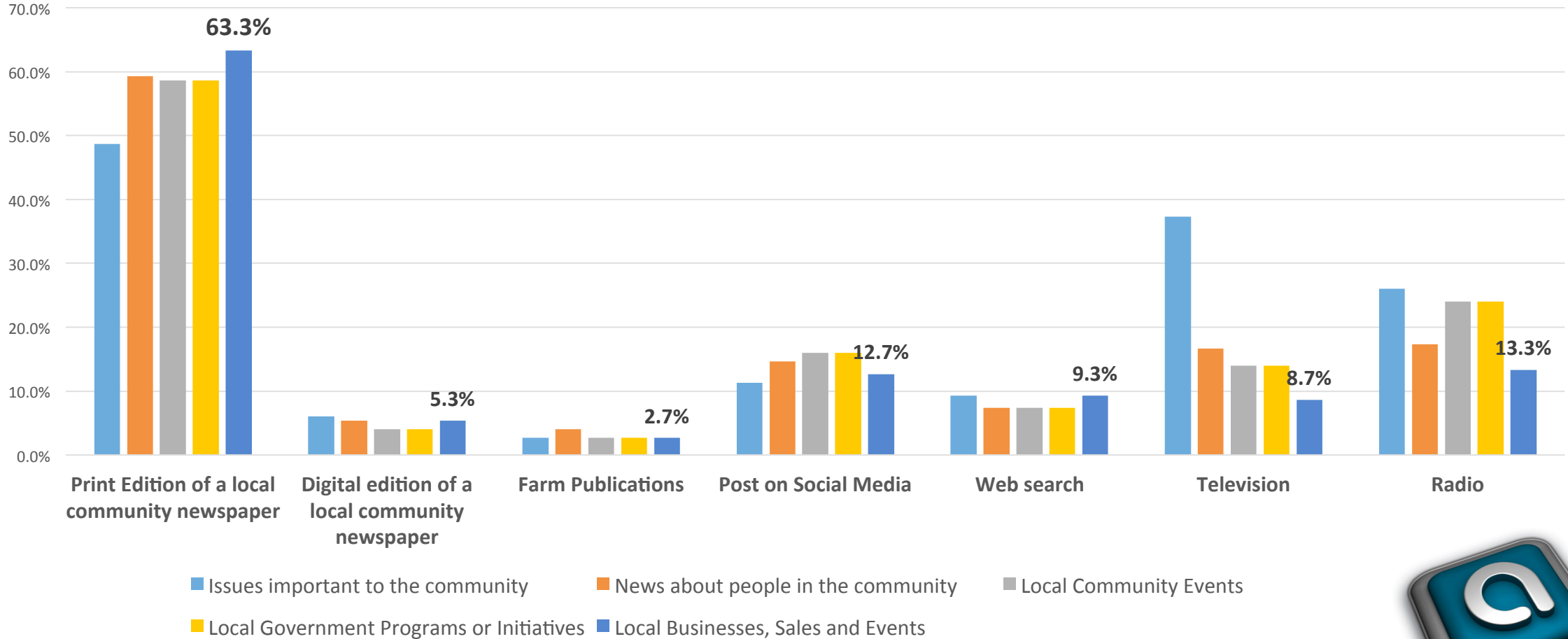
Concern Over Receiving More Ads From the Advertiser and Downloading a Virus Were the Main Reasons Given for NOT CLICKING on Ads on Websites, Phones or Tablets

REASONS FOR NOT CLICKING ON ADS



In Cities, Printed Community Newspapers Are the Preferred Media to Receive Information About All Local Issues **Including Local Businesses, Sales and Events**

Preferred Media to Receive Information on Specific Types of Information

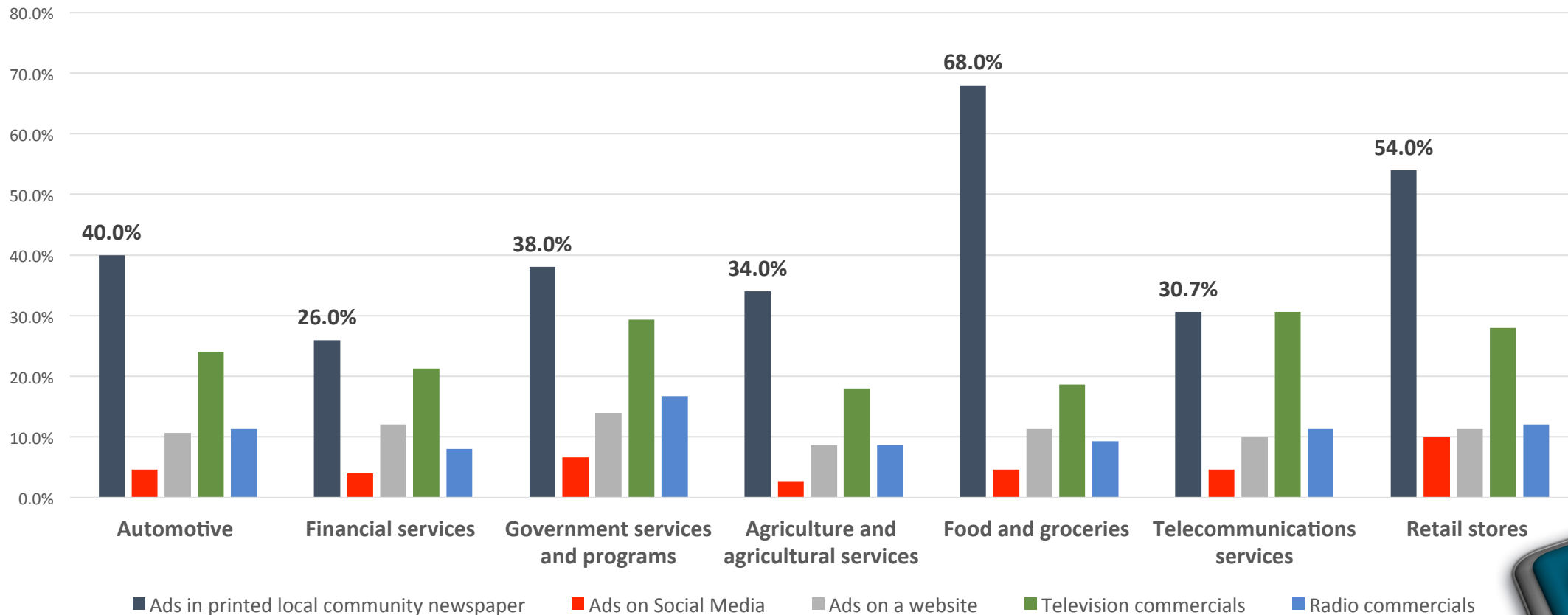


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COMMUNITY NEWSPAPERS RESULTS

In Cities, Printed Local Community Newspapers Are More Likely to Inspire Action Than Other Mediums and **SIGNIFICANTLY more Likely to inspire Action** Than Social Media and Other Website Ads

Media Containing Ads Most Like to Inspire Action (In-Person Store Visit, Website Visit, Purchase Decision) by Sector



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COMMUNITY NEWSPAPERS RESULTS

Of Respondents Indicating They Are Inspired by Ads, **More Are Driven to Visit a Store In-Person or Online by an Ad in a Printed Community Newspaper Than Any Action Inspired by an Online Ad**

Actions Taken as a Result of Seeing an Ad in Printed Local Community Newspaper Vs an Online Ad on a Website or Social Media

