

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.

VILLAGES (1,000-5,000 POPULATION)

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

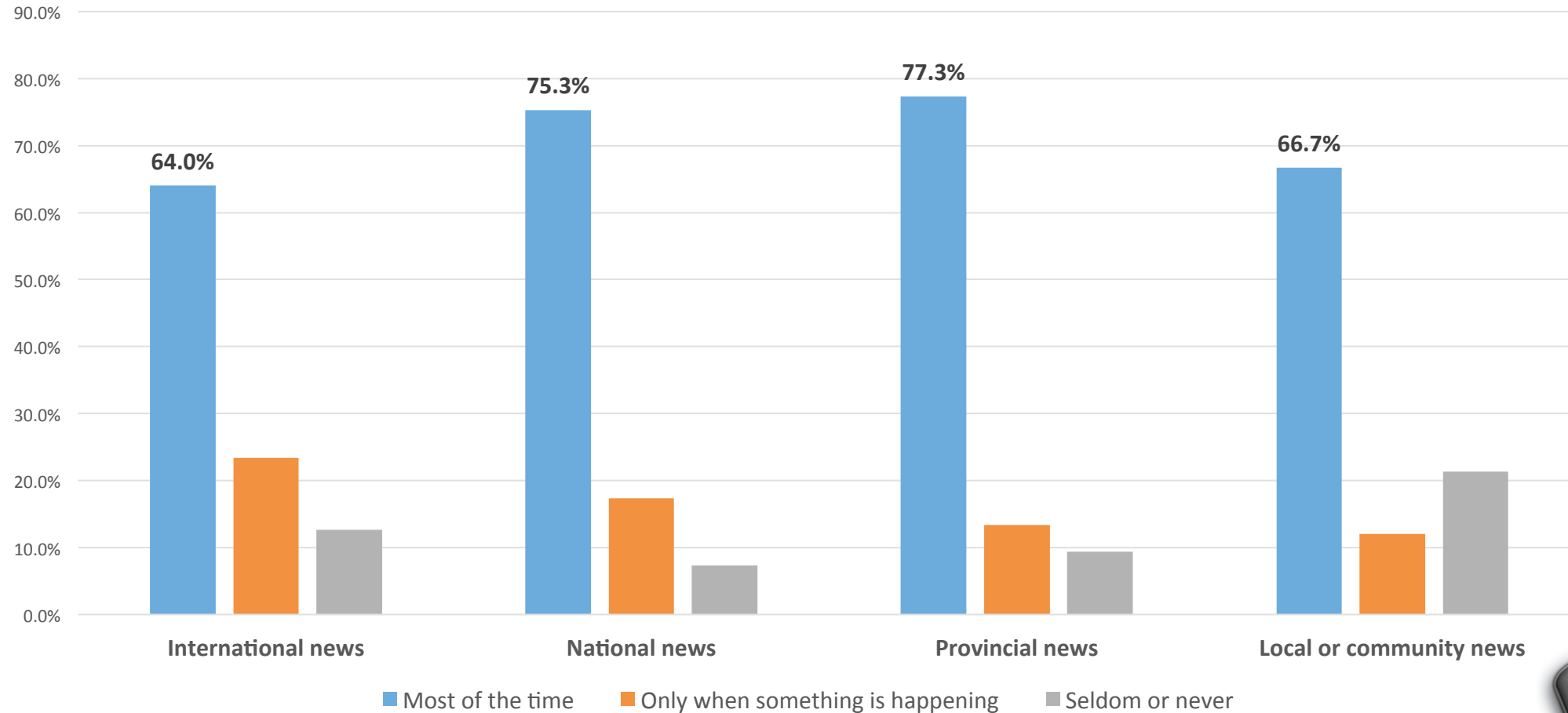
COMMUNITY NEWSPAPERS *RESULTS*



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

Personally Follow Specific Types of News

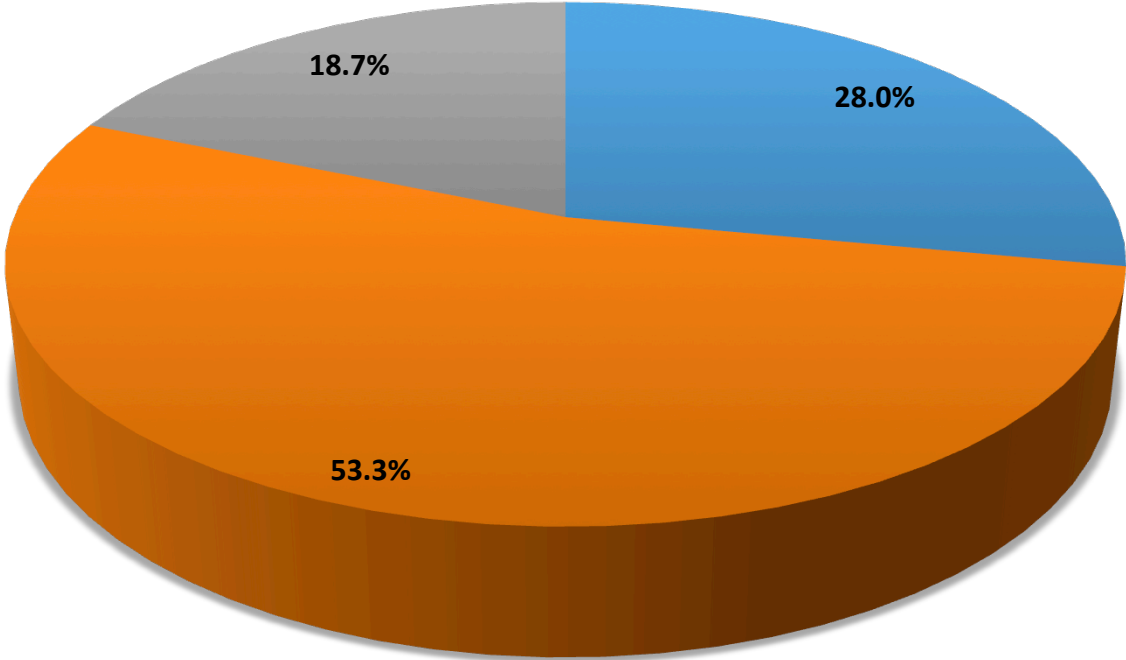


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COMMUNITY NEWSPAPERS RESULTS

THE MAJORITY OF RESPONDENTS IN VILLAGES INDICATE THEY SPEND ABOUT THE SAME AMOUNT OF TIME CONSUMING NEWS AS THEY DID 2 YEARS AGO. 28% SAID THEY SPENT MORE TIME WITH NEWS

Time Spent With News Compared to 2 Years Ago

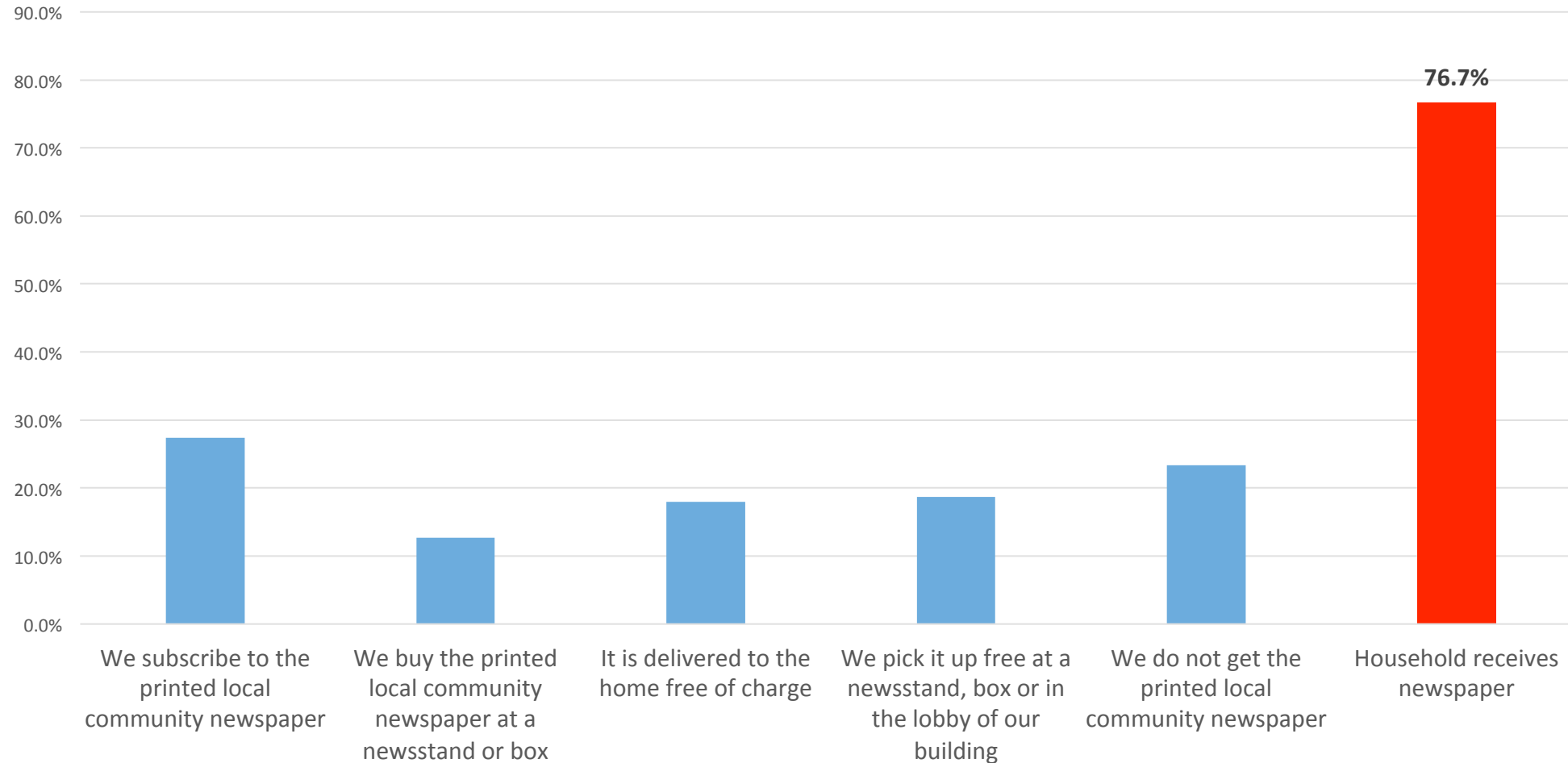


■ More time per day ■ About the same amount of time ■ Less time per day



IN 2018, OVER THREE QUARTERS OF HOUSEHOLDS IN VILLAGES RECEIVE A PRINTED LOCAL COMMUNITY NEWSPAPER AT HOME

Receivership of Local Printed Community Newspapers

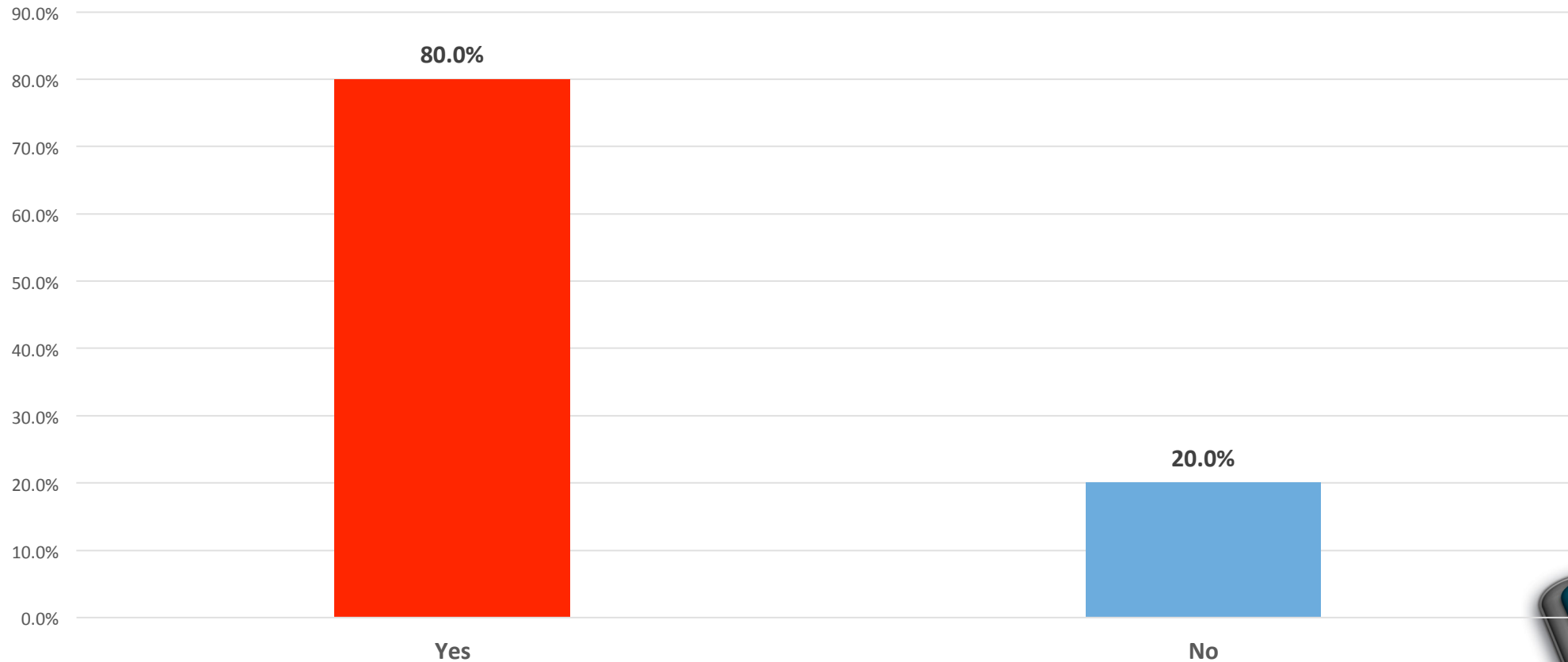


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COMMUNITY NEWSPAPERS *RESULTS*

FOUR OUT OF FIVE RESPONDENTS IN VILLAGES SAID THEY READ OR AT LEAST LOOKED INTO A PRINTED COMMUNITY NEWSPAPER IN THE LAST WEEK

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



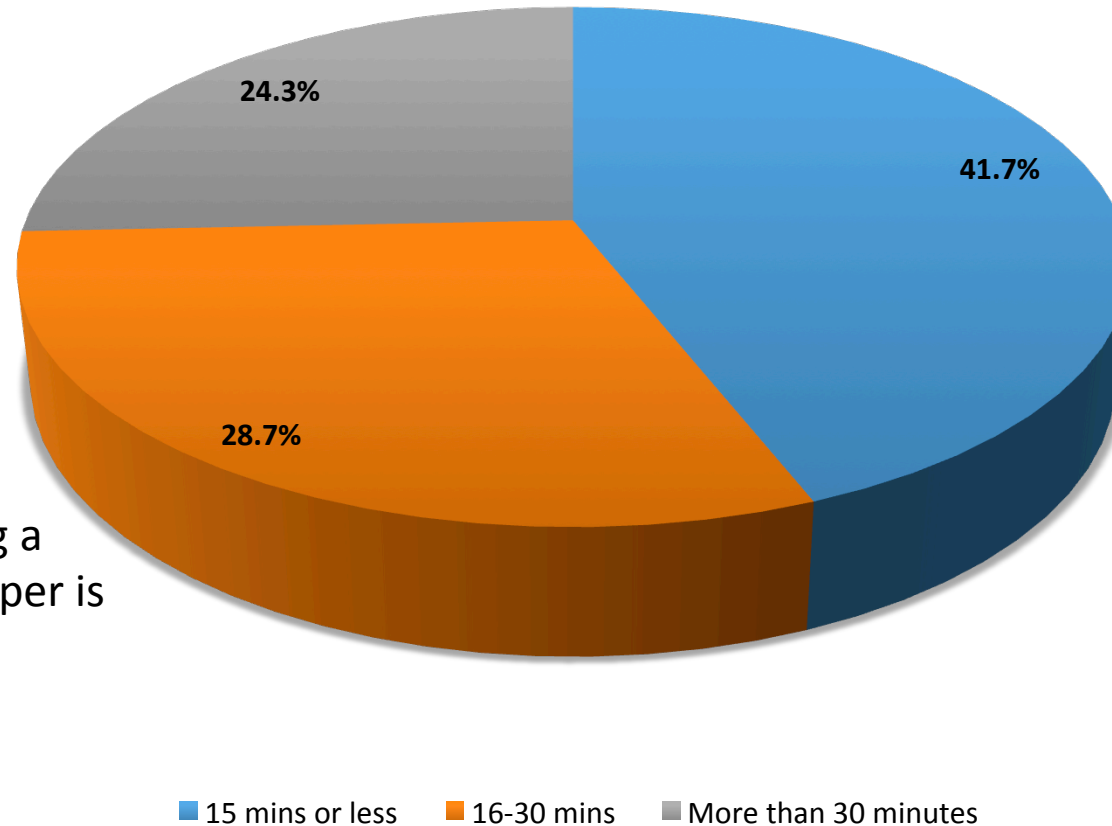
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Over Half of Respondents Villages Spend More Than 15 Minutes Reading the Printed Community Newspaper Each Week.
Nearly 25% Spend More Than 30 Minutes Reading Each Week.

Time Spent Reading Per Week

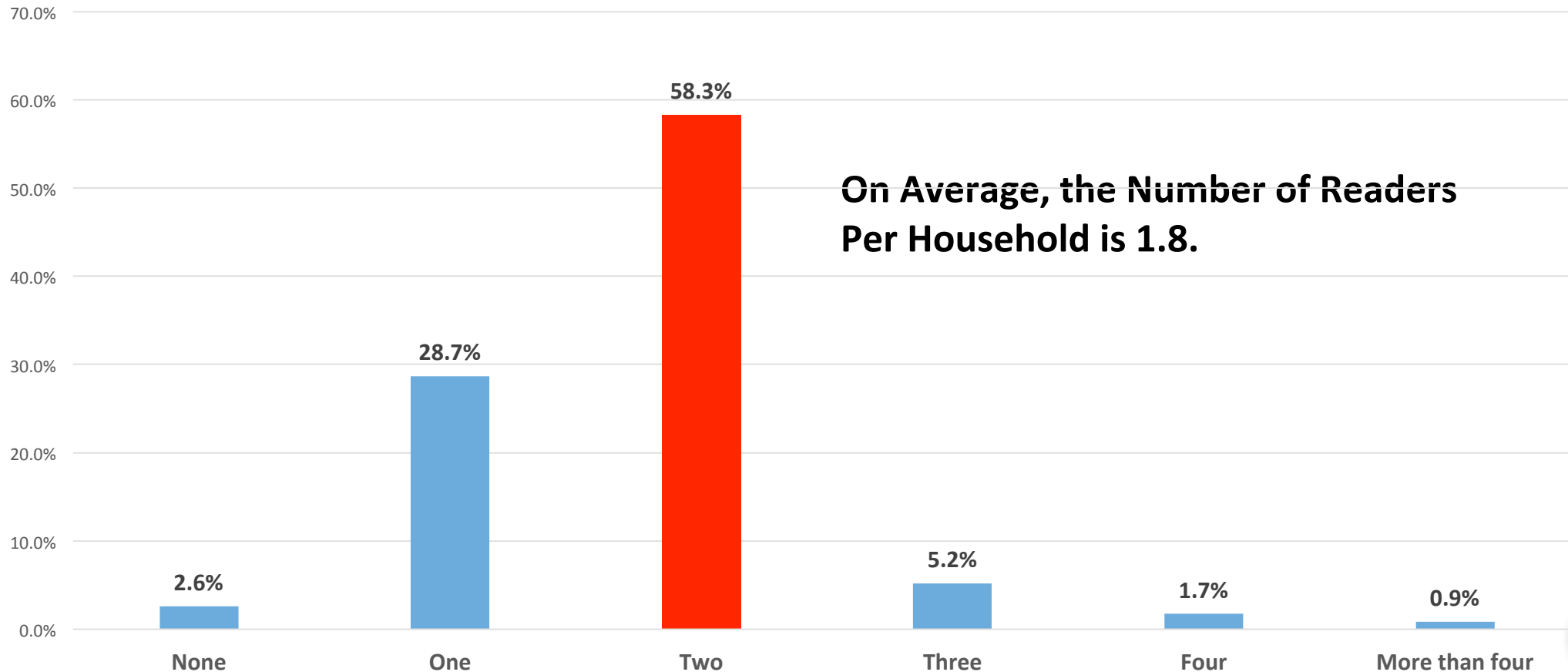


Average Time Spent Reading a Printed Community Newspaper is **18.5 Minutes**



In 62% of Households in Villages, 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

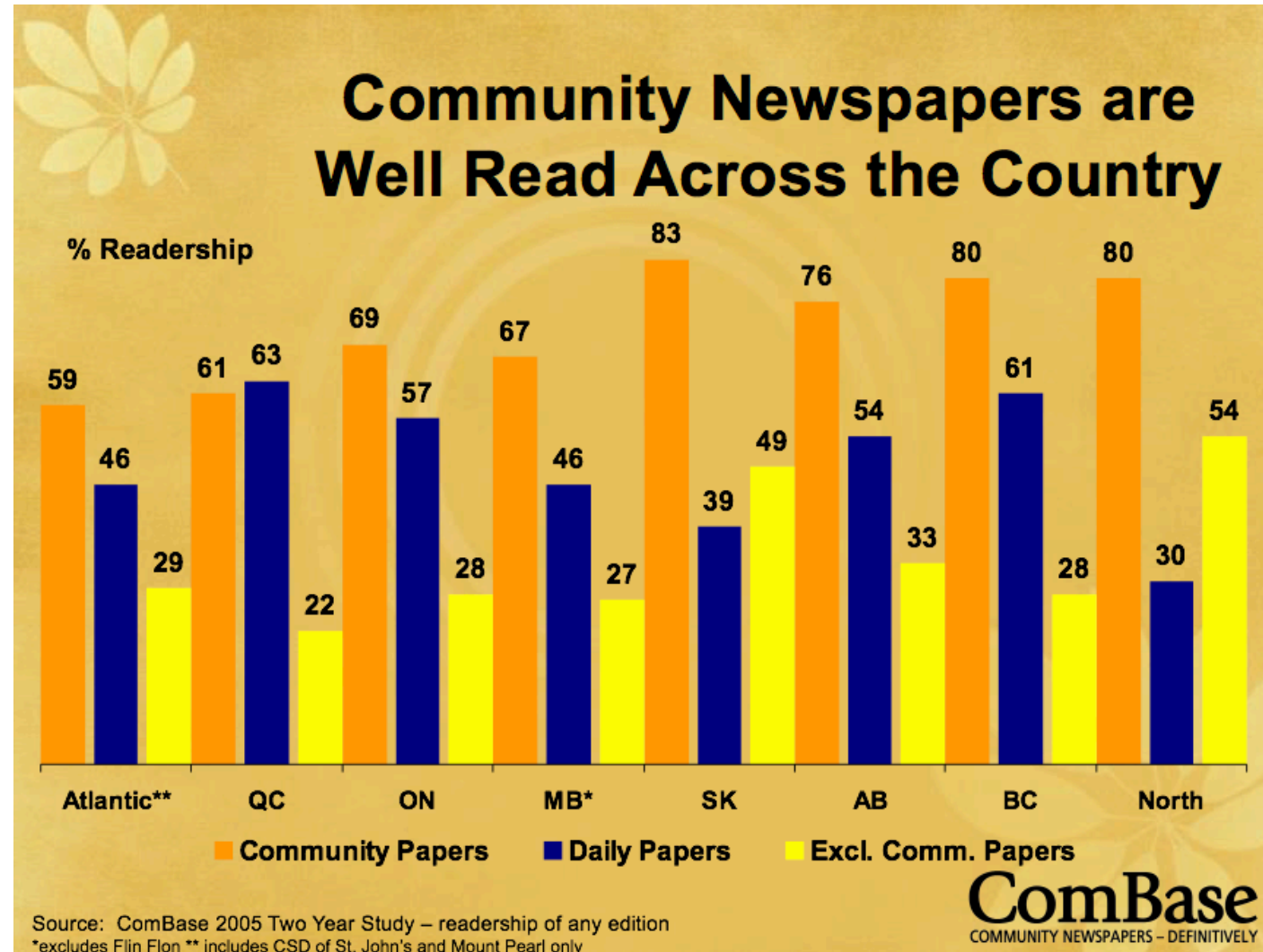


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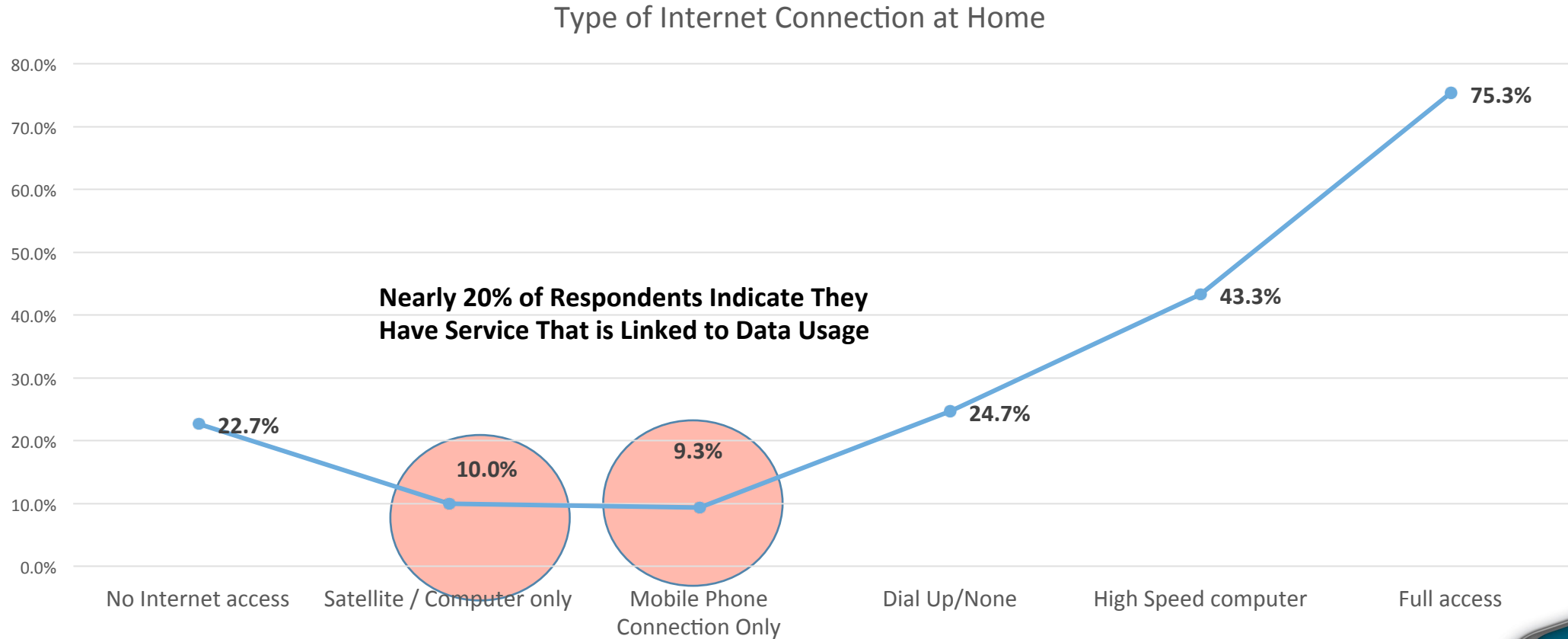
In 2005, the National Community Newspaper Readership Study (ComBase) Reported Readership of Community Newspapers in Manitoba (67%) and Saskatchewan (83%)



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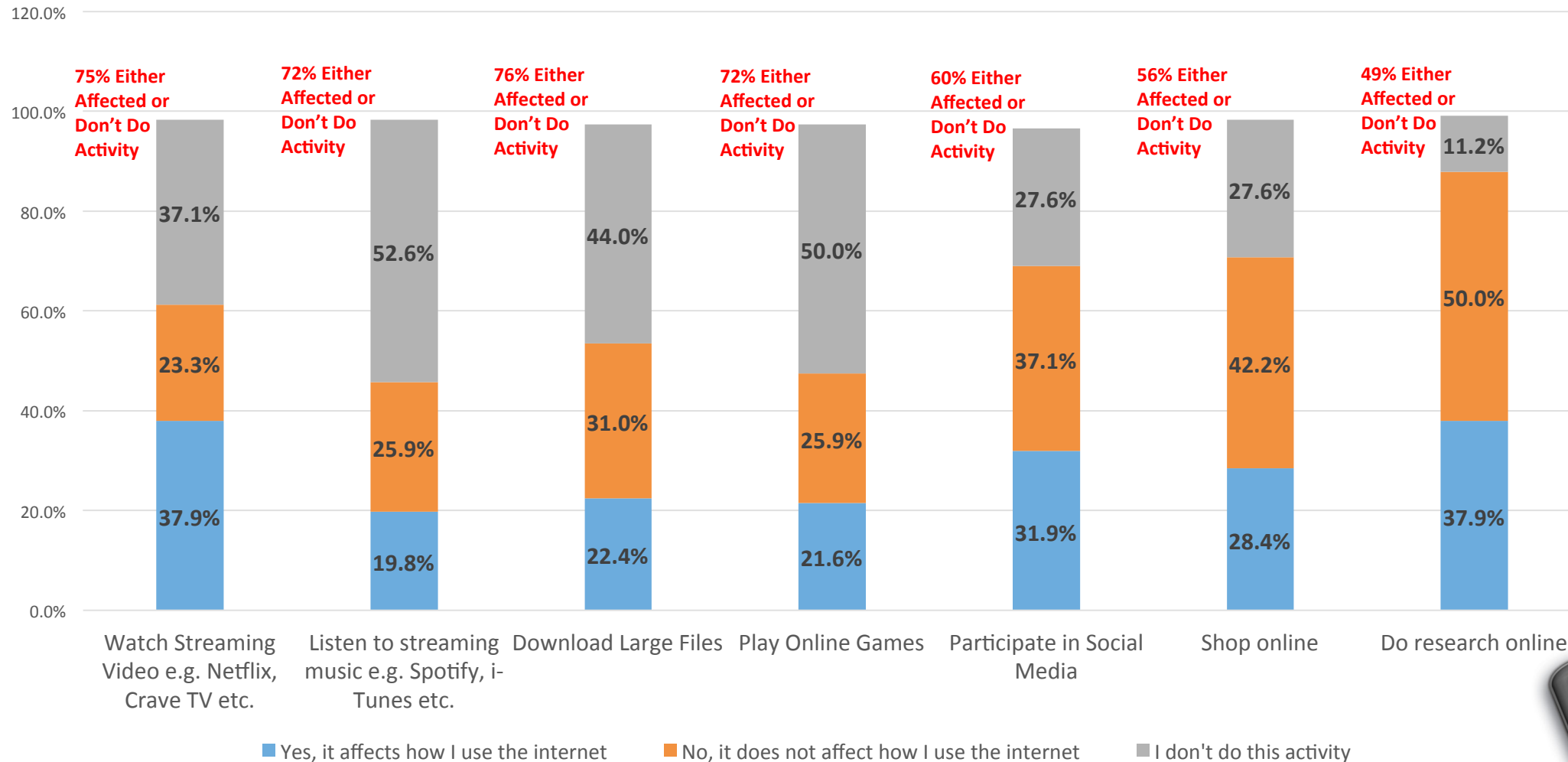
COMMUNITY NEWSPAPERS *RESULTS*

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



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

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

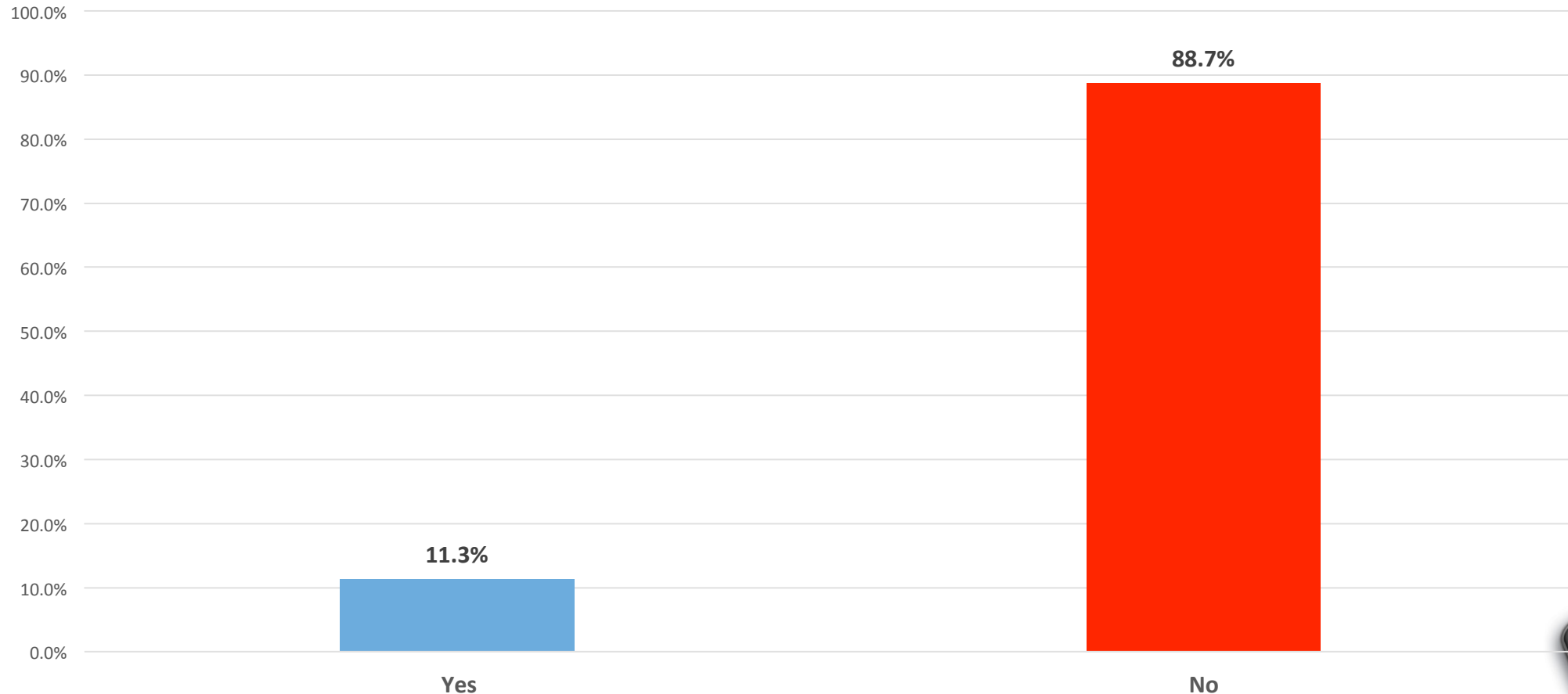


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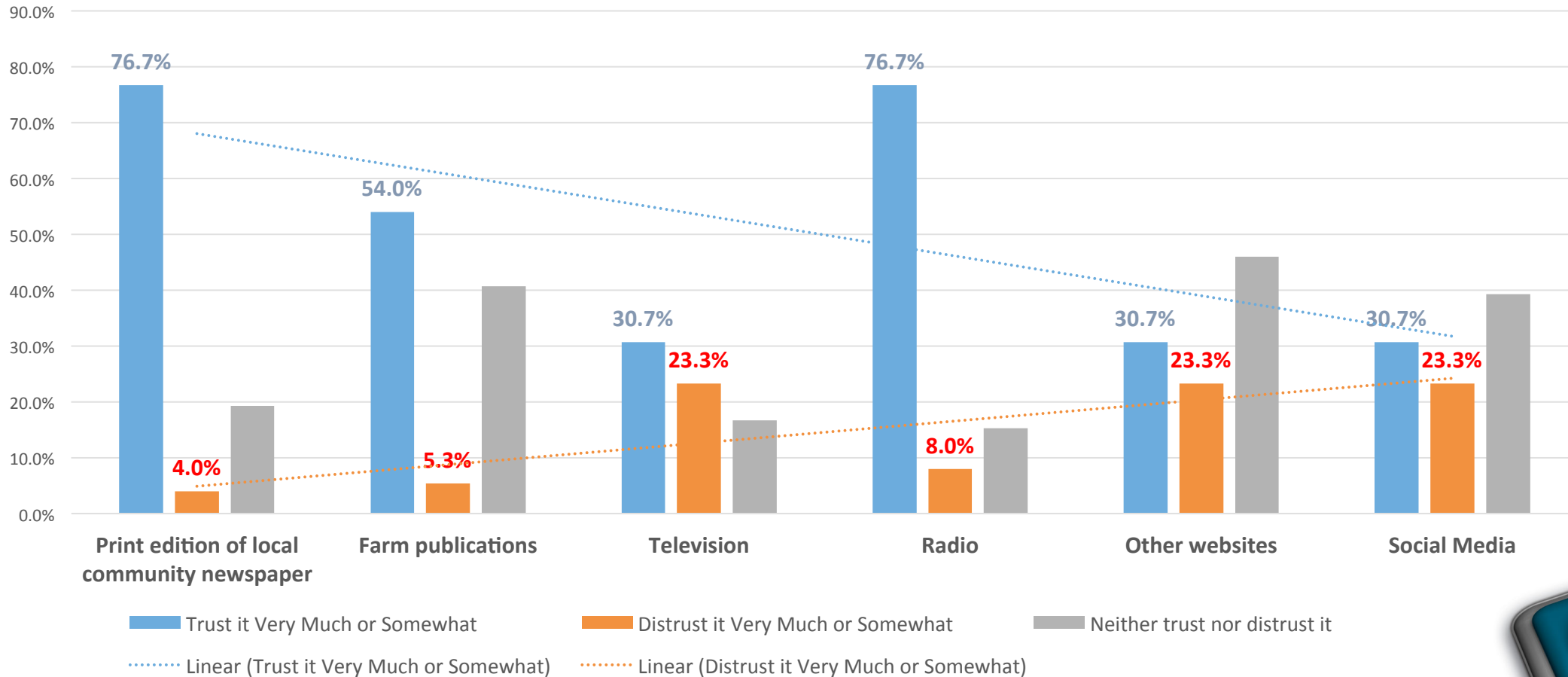
Another Activity That Respondents in Village Households Indicate That They Are Not Likely to be Doing, is Visiting the Website of a Local Community Newspaper

Have You Personally Visited the Website of a Local Community Newspaper in the Last Week



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

Trust in Various Media Platforms

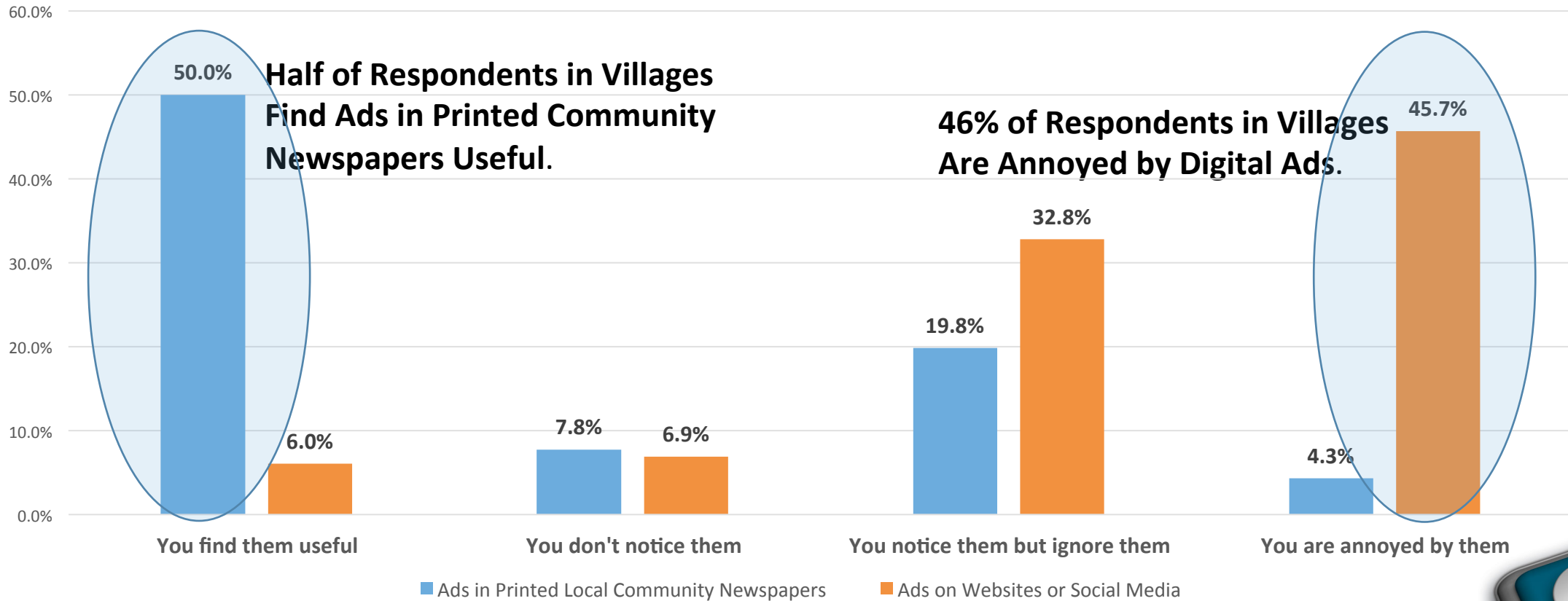


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Trust in News and Advertising Content of Printed Community Newspapers Leads to a Significantly Higher % of Respondents From Village Households Finding Ads Useful Than Digital Forms of Advertising

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



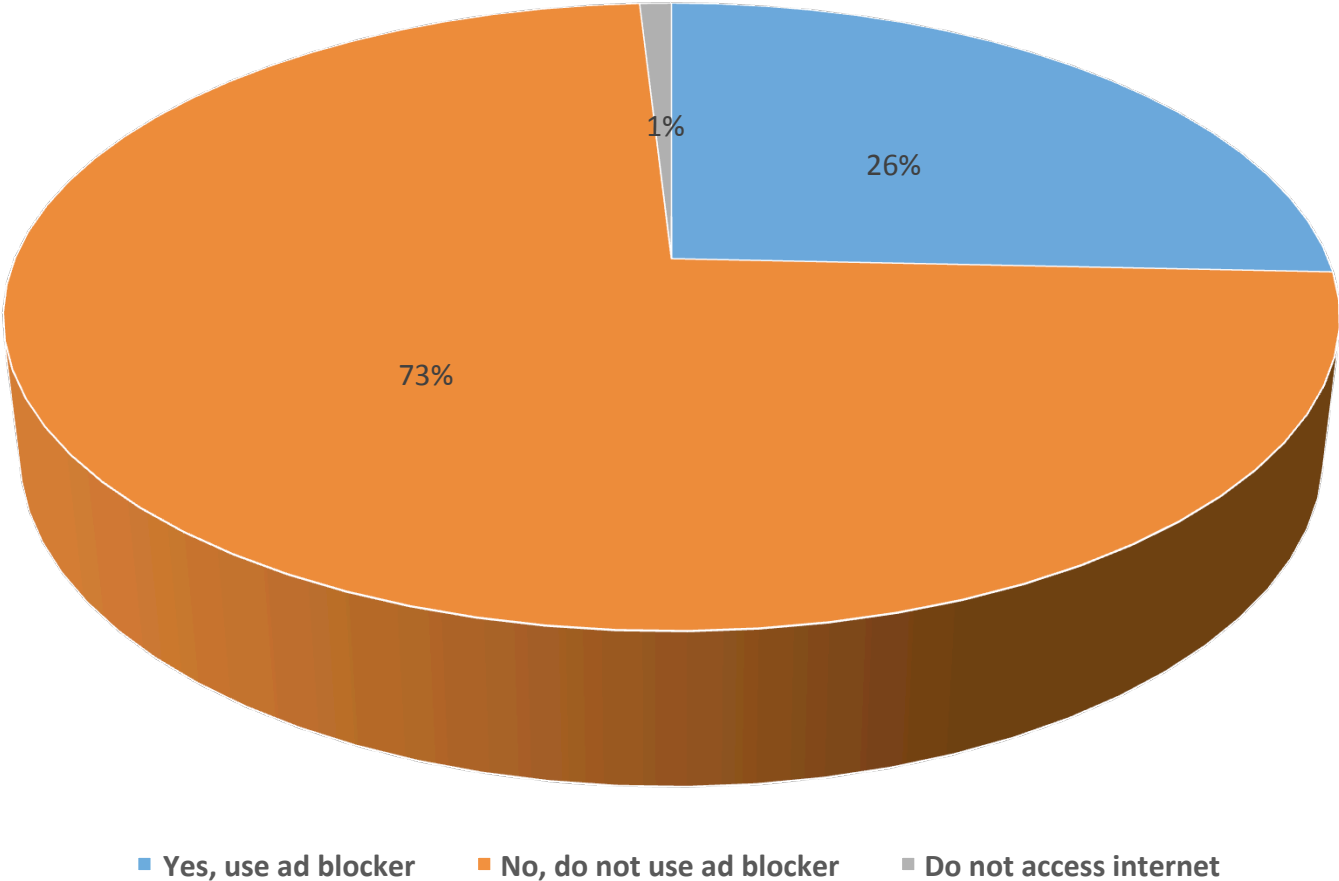
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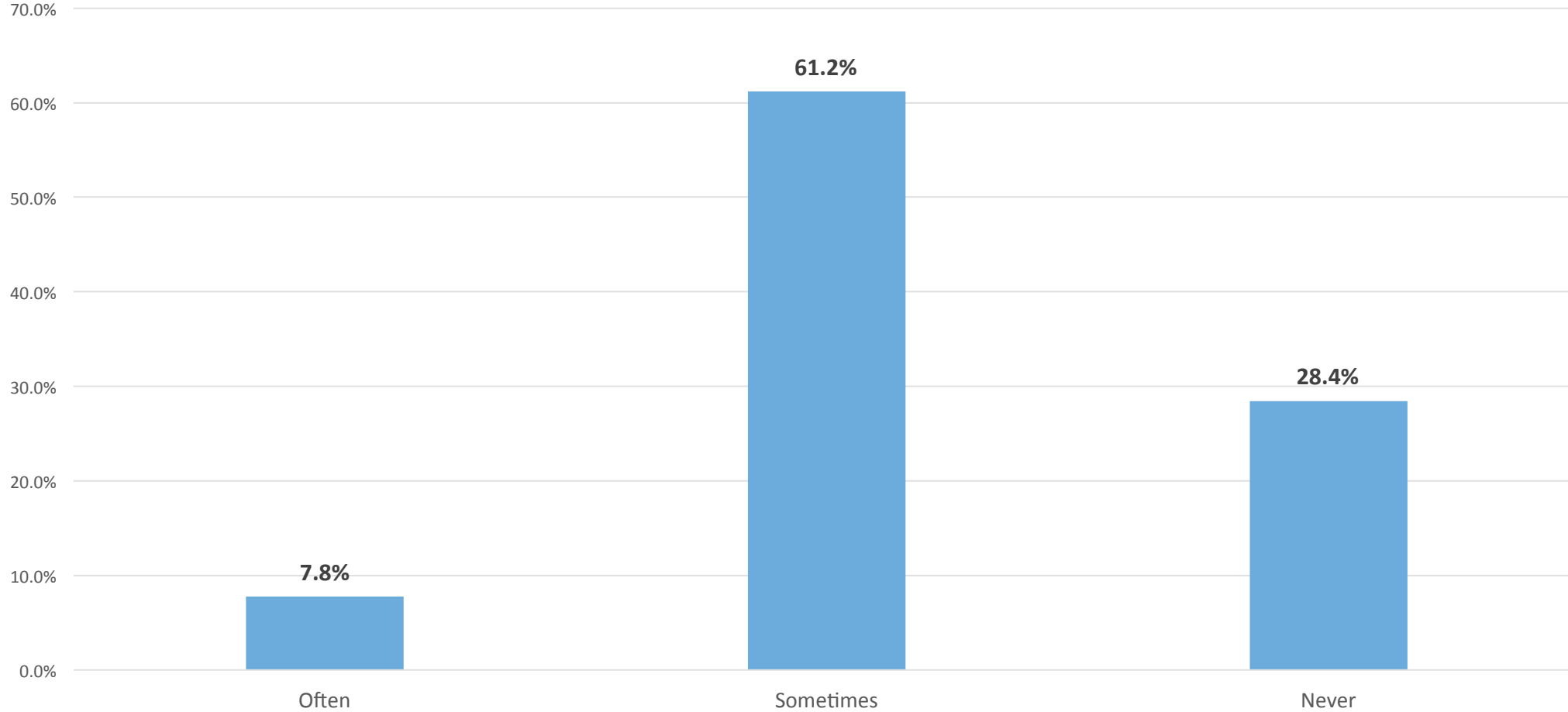
Over One Quarter of Respondents in Villages Report Usage of an AdBlocker on a Device to Block Online Ads

Use of AdBlockers on Devices to Access the Internet



Nearly 70% of Village Respondents Say They Click on Ads by Accident

How Often Would You Say You Click on Ads on Your Computer, Phone or Tablet



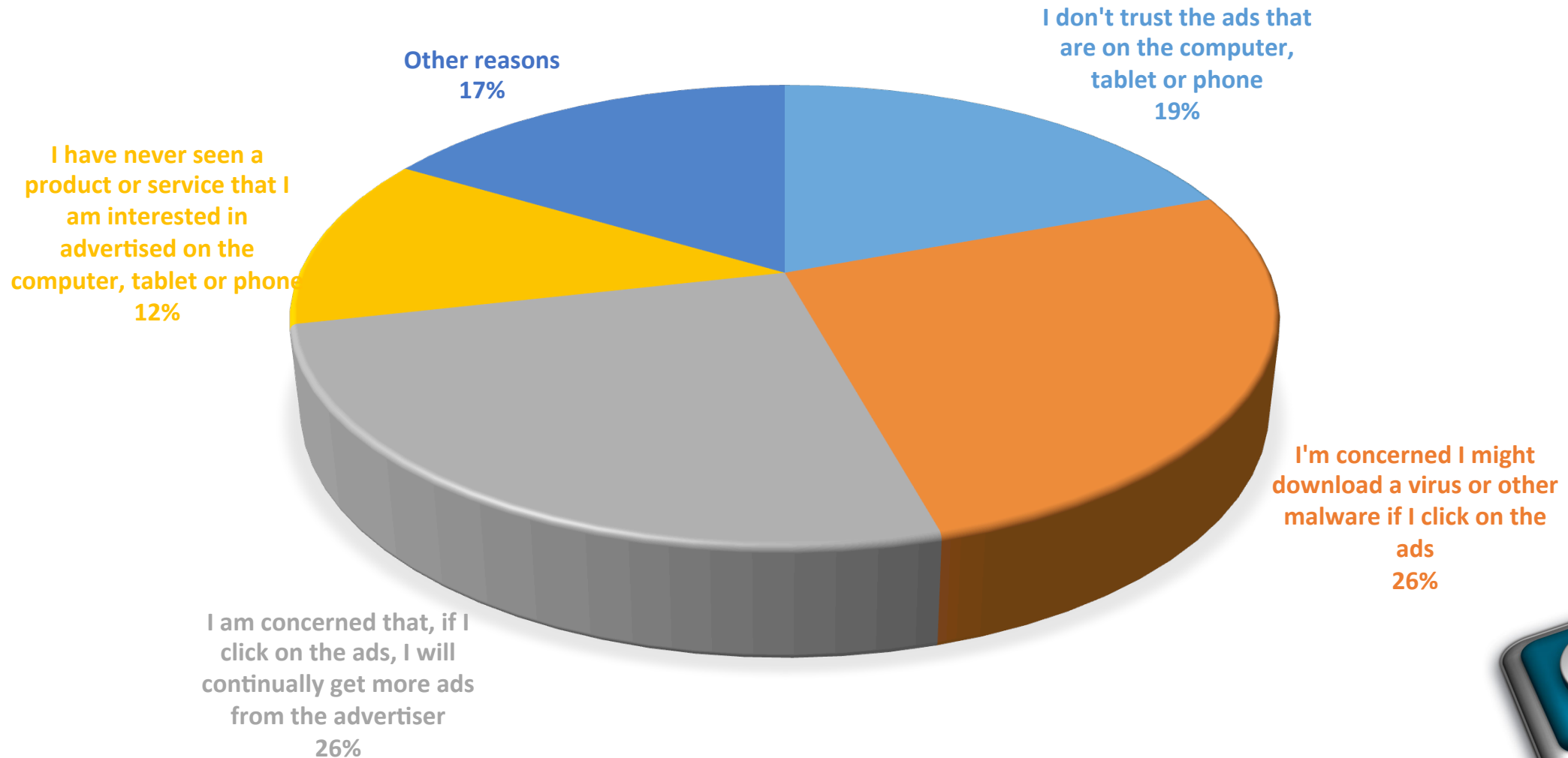
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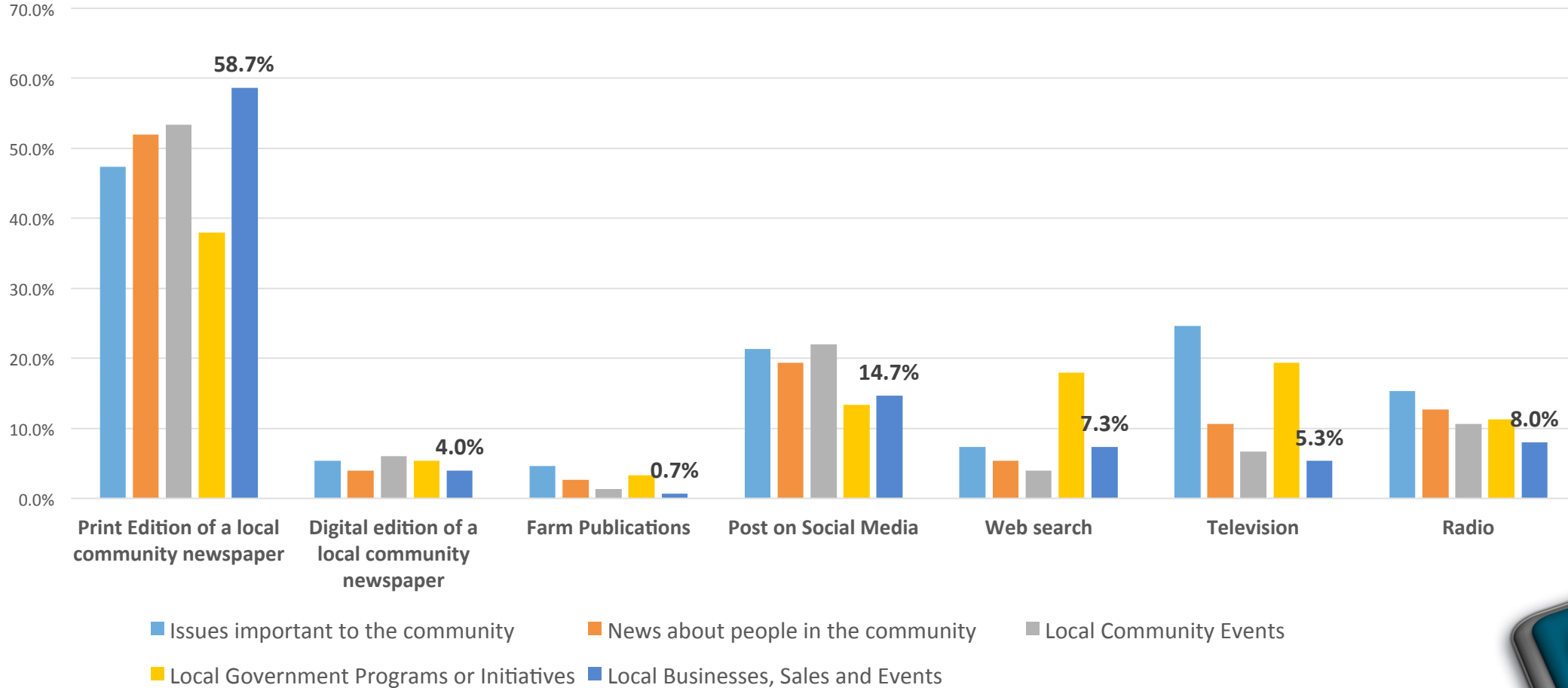
The Majority of Respondents Don't Click on Online Ads Over Concerns About Downloading Viruses or Malware

REASONS FOR NOT CLICKING ON ADS



In Villages, 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

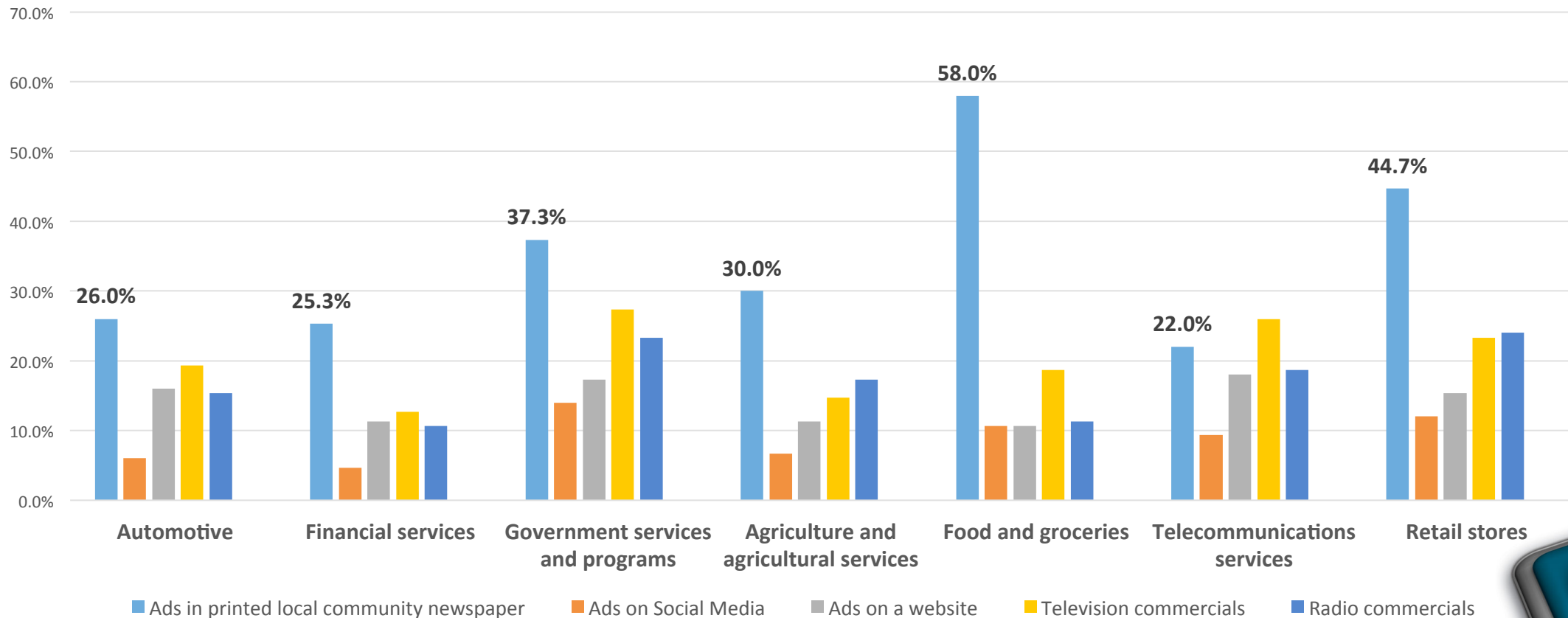


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In Villages, Ads in Printed Local Community Newspapers Are More Likely to Inspire Action Than Other Mediums and **SIGNIFICANTLY** more Likely to Inspire Action Than Social Media and Other Website Ads

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

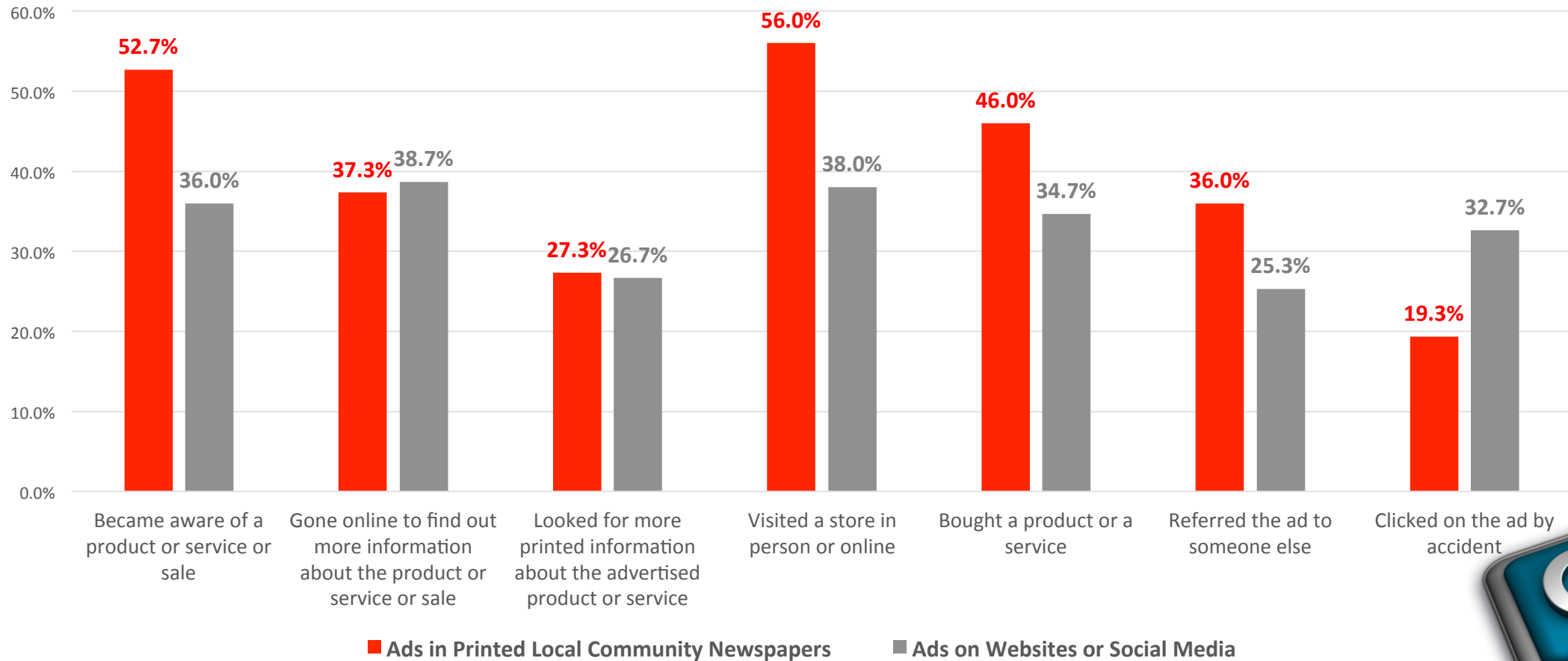


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Of Respondents Indicating They Are Inspired by Ads, More Are Driven to Purchase a Product or Service by an Ad in a Printed Community Newspaper **Than Any Action Inspired by an Online Ad**

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



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