

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 Gender

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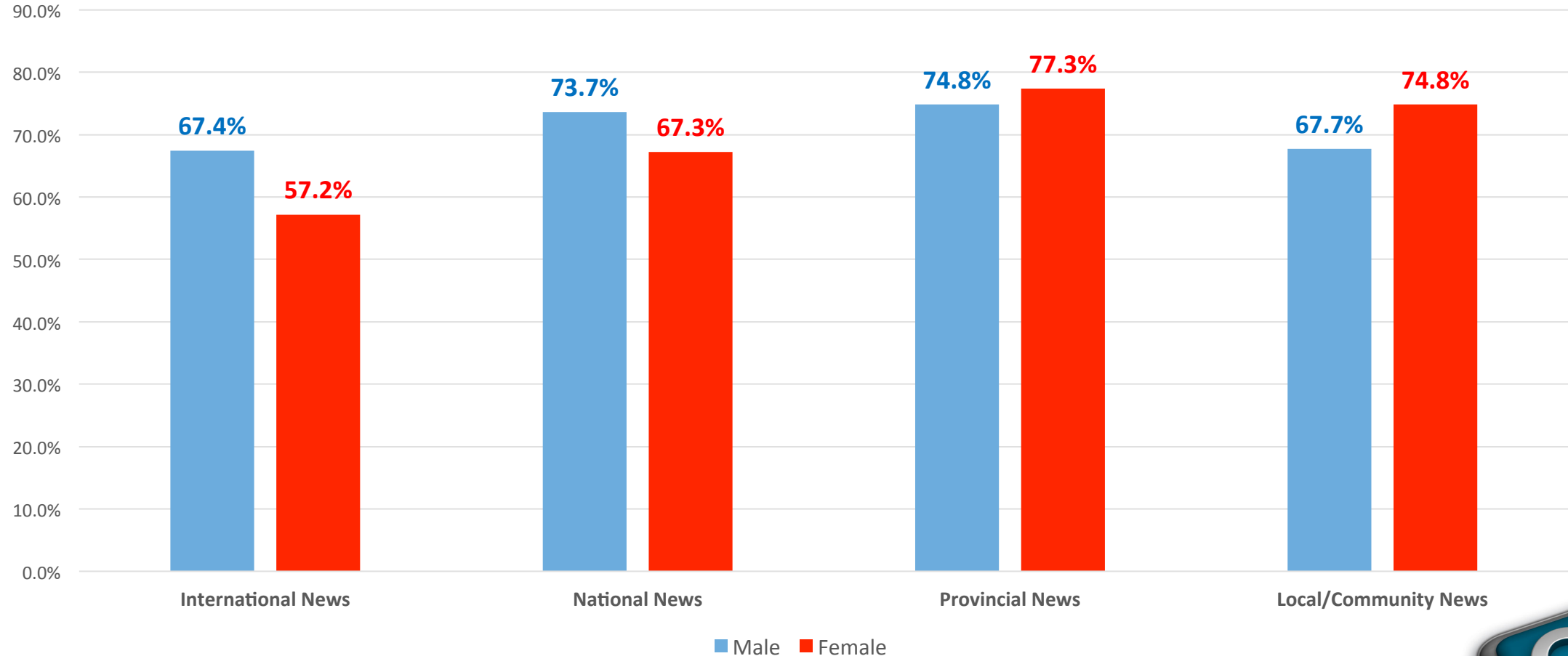
COMMUNITY NEWSPAPERS *RESULTS*



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NEWS REMAINS A STRONG PLATFORM WITH A MAJORITY OF MEN AND WOMEN INDICATING THEY FOLLOW MOST TYPES OF THE NEWS 'MOST OF THE TIME'

Types of News Followed 'MOST OF THE TIME'



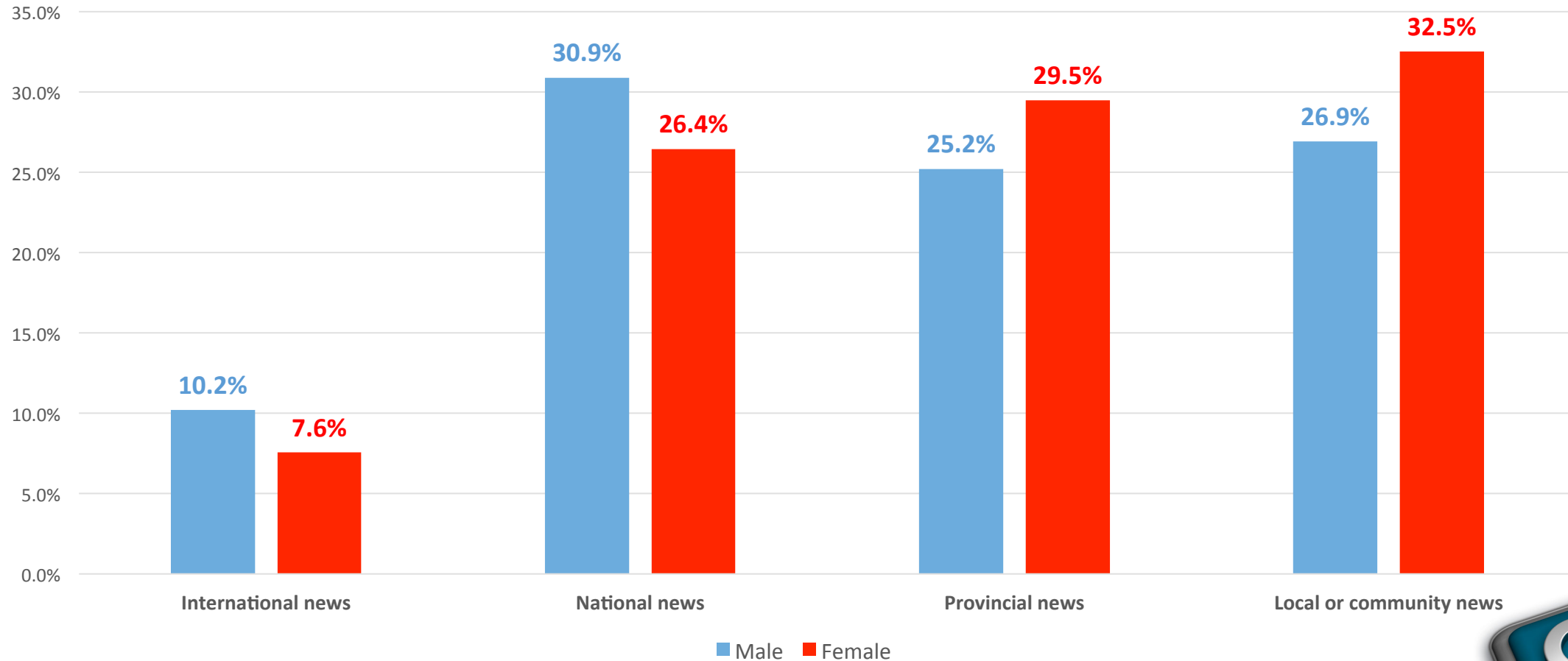
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COMMUNITY NEWSPAPERS RESULTS



WHILE WOMEN INDICATED THAT LOCAL/COMMUNITY NEWSPAPERS WAS MOST IMPORTANT TO THEM, THE MAJORITY OF MEN CITED NATIONAL NEWS

Most Important Type of News to You Personally



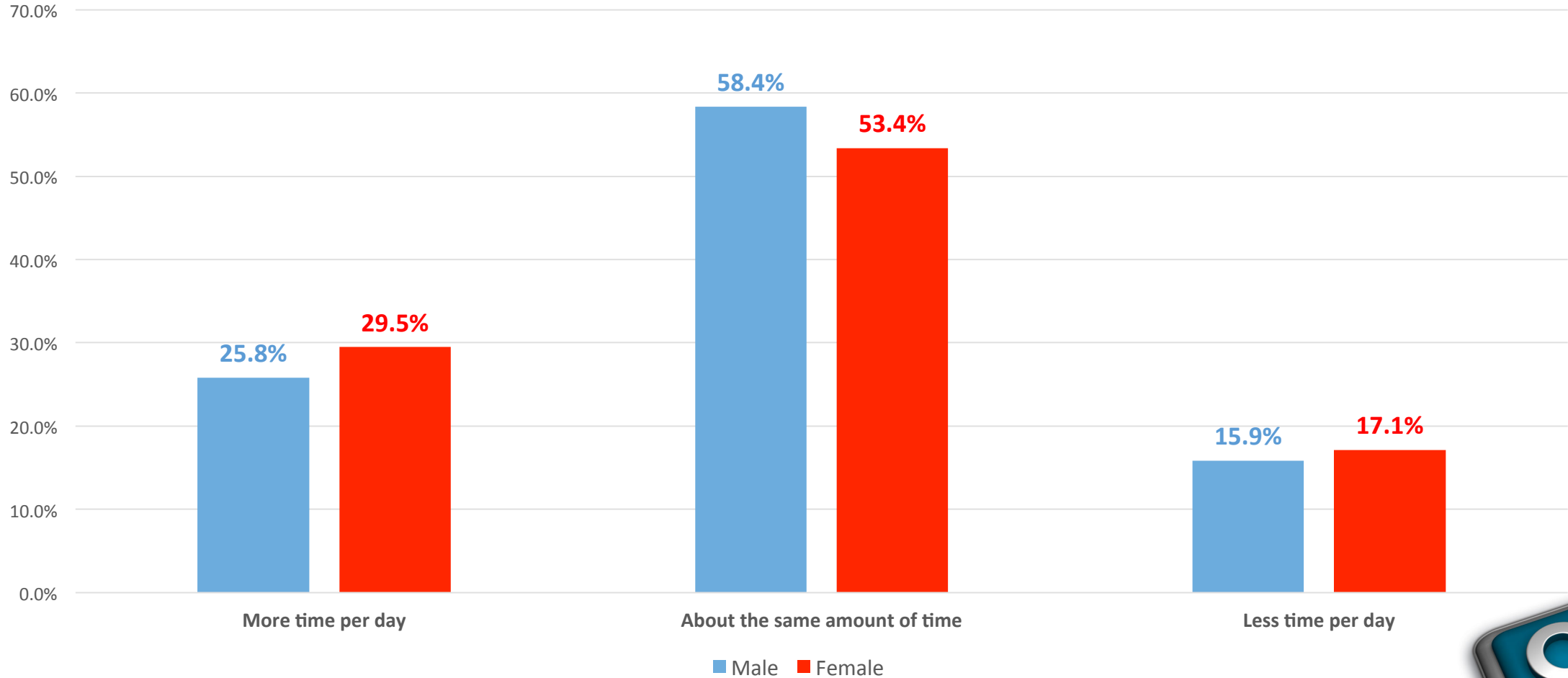
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COMMUNITY NEWSPAPERS RESULTS



OVER HALF OF BOTH MEN AND WOMEN SAID THEY SPEND AT LEAST THE SAME AMOUNT OF TIME WITH NEWS AS THEY DID 2 YEARS AGO ALTHOUGH 1 IN 3 WOMEN INDICATED THEY ARE SPENDING MORE TIME WITH NEWS

Time Spent With News Compared to 2 Years Ago



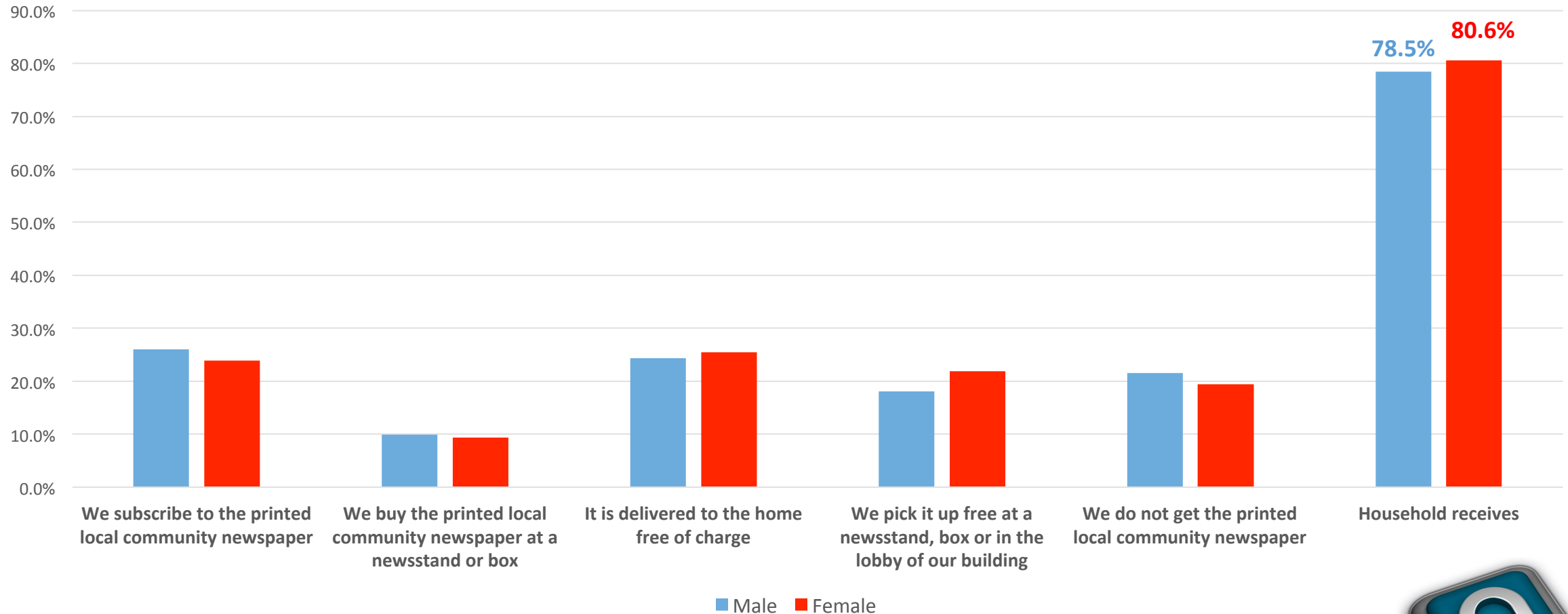
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8 in 10 MEN AND WOMEN RESPONDENTS INDICATED THAT THE HOUSEHOLD RECEIVES A PRINTED COMMUNITY NEWSPAPER

Household Receives a Printed Community Newspaper

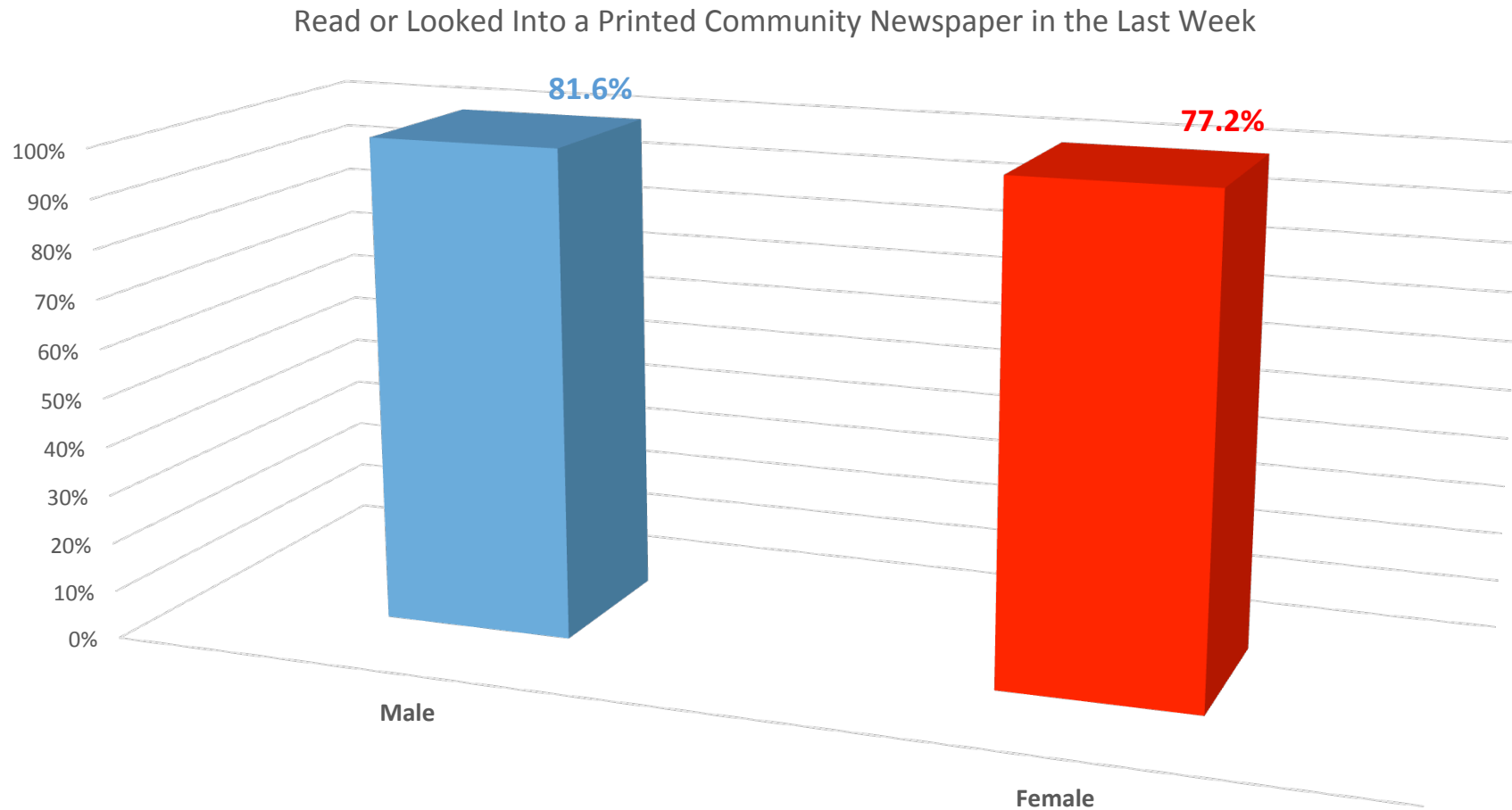


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COMMUNITY NEWSPAPERS RESULTS



READERSHIP OF PRINTED COMMUNITY NEWSPAPERS IS SLIGHTLY HIGHER AMONGST MEN BUT REMAINS STRONG WITH BOTH MEN AND WOMEN



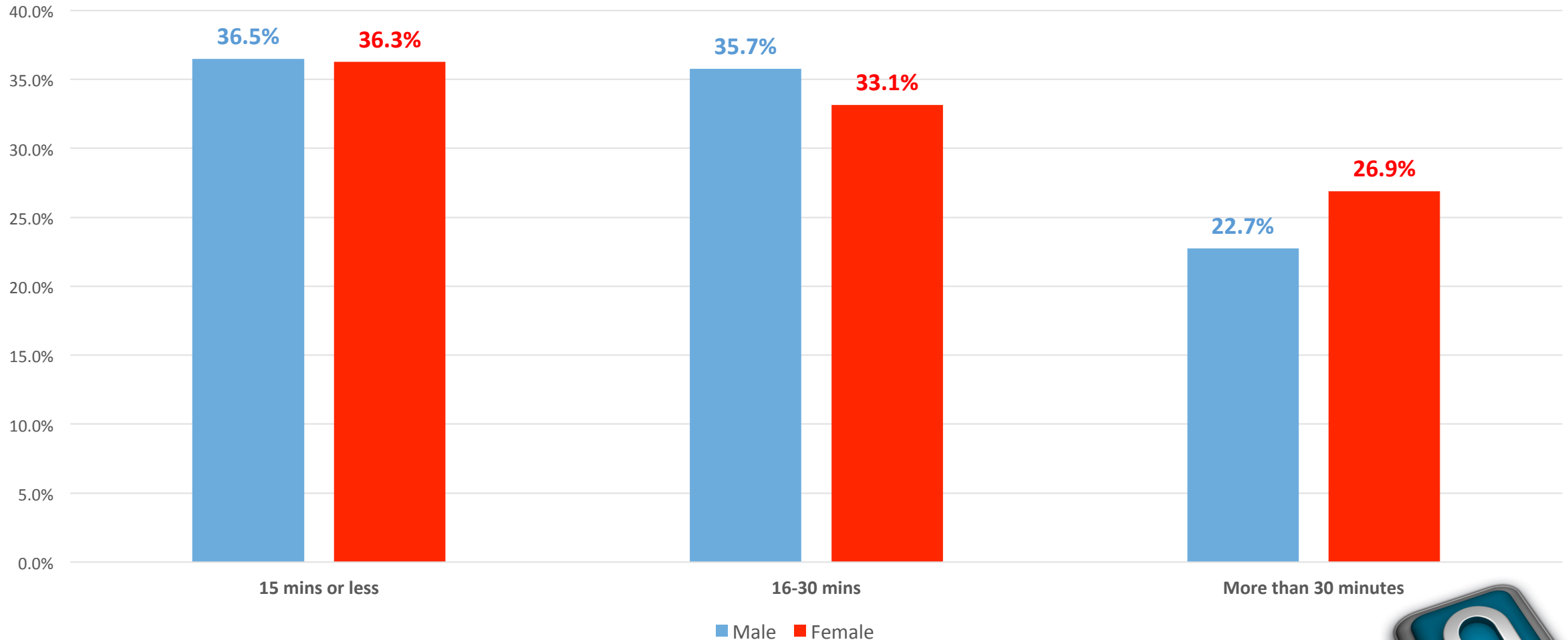
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COMMUNITY NEWSPAPERS *RESULTS*



THE MAJORITY OF BOTH MEN AND WOMEN SPEND MORE THAN 15 MINUTES READING THE PRINTED COMMUNITY NEWSPAPER EACH WEEK. ONE-QUARTER OF WOMEN SPEND OVER 30 MINUTES.

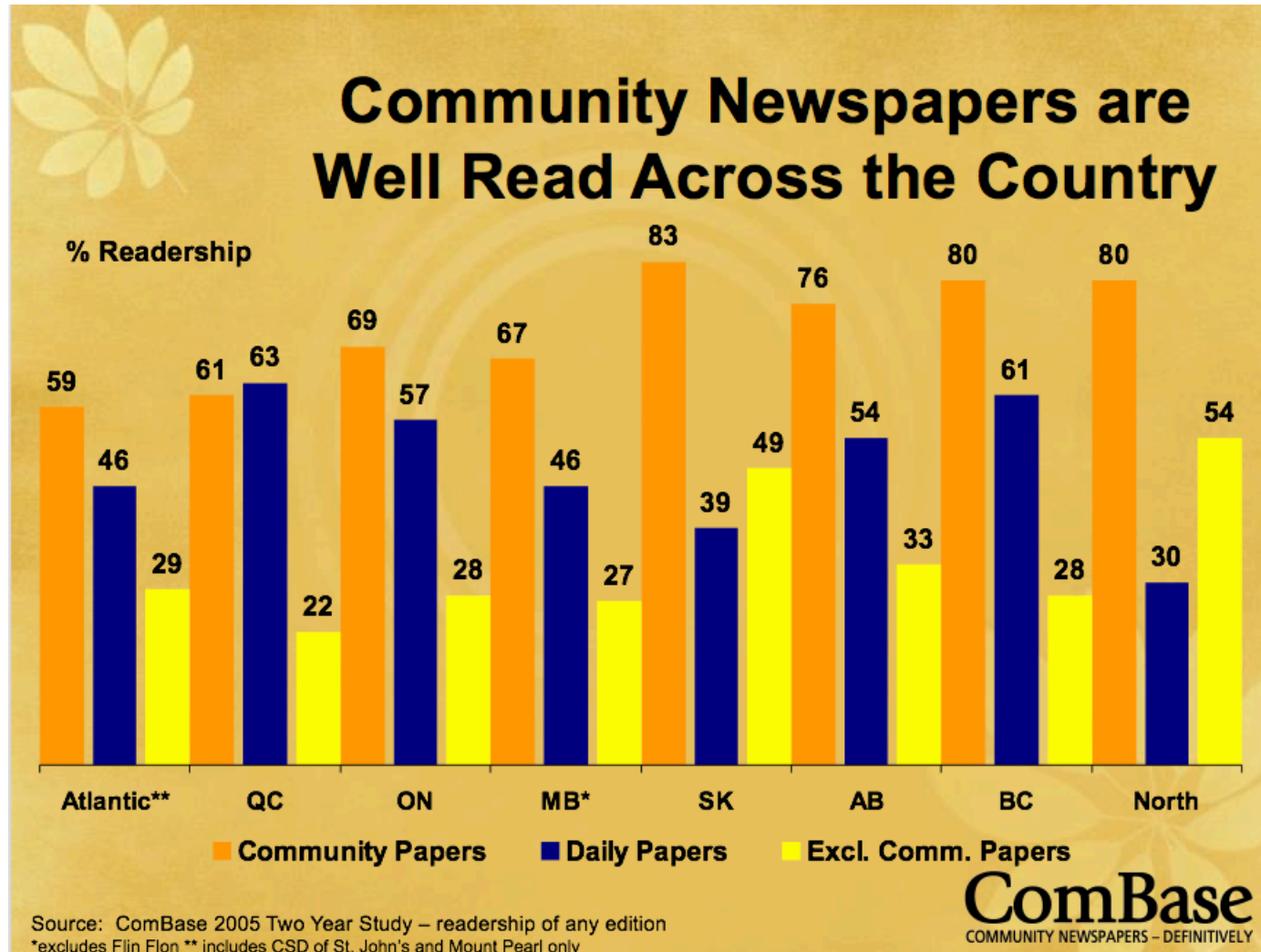
Time Spent Reading the Printed Community Newspaper Each Week



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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

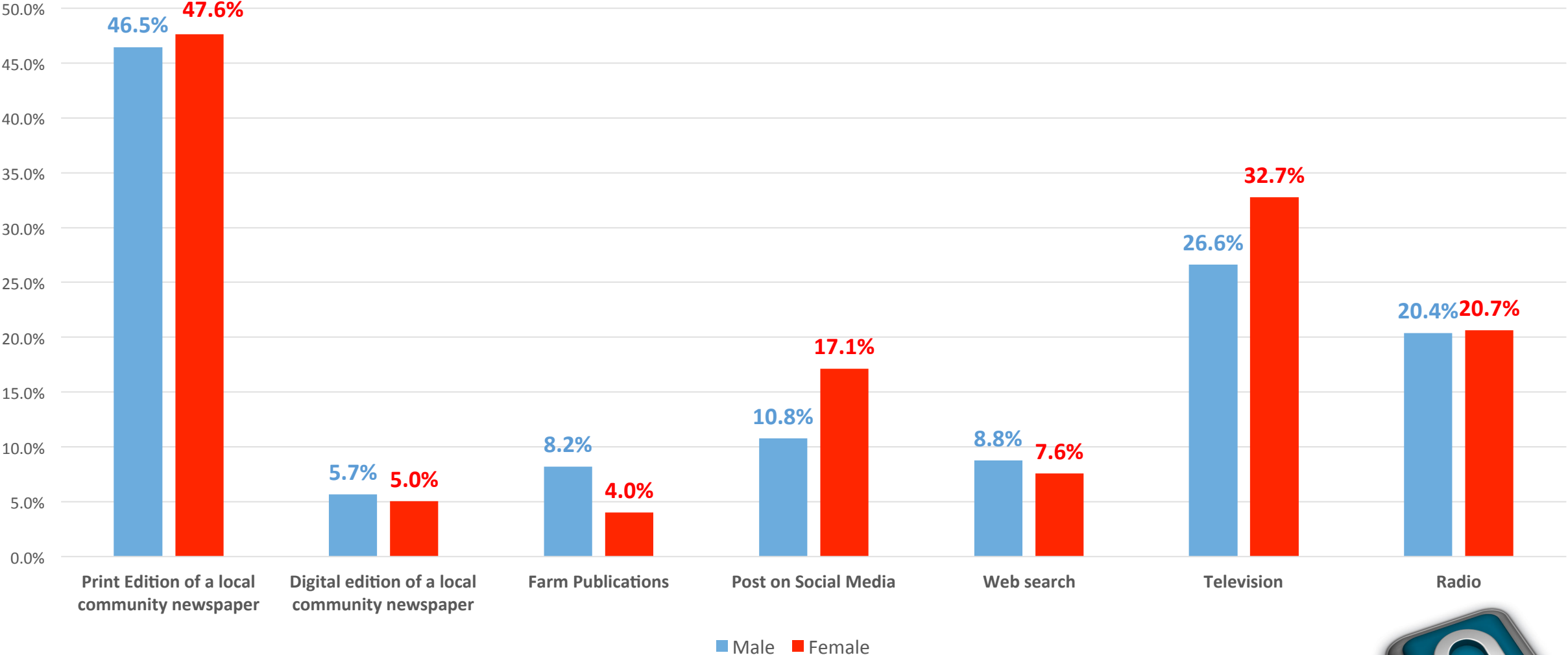
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COMMUNITY NEWSPAPERS *RESULTS*



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MARKET DATA | READERSHIP INFO | RESULTS

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

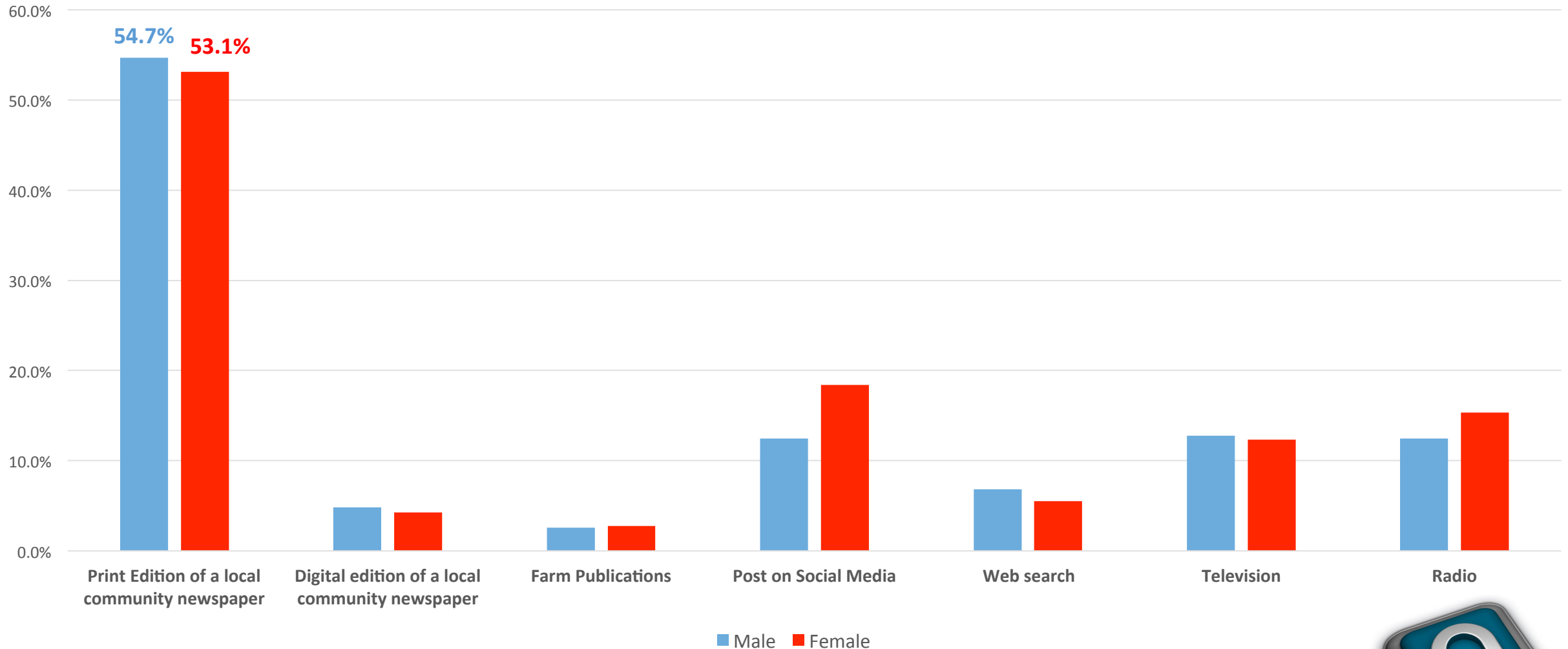


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Preferred Media to Receive News About: *News About People in the Community*

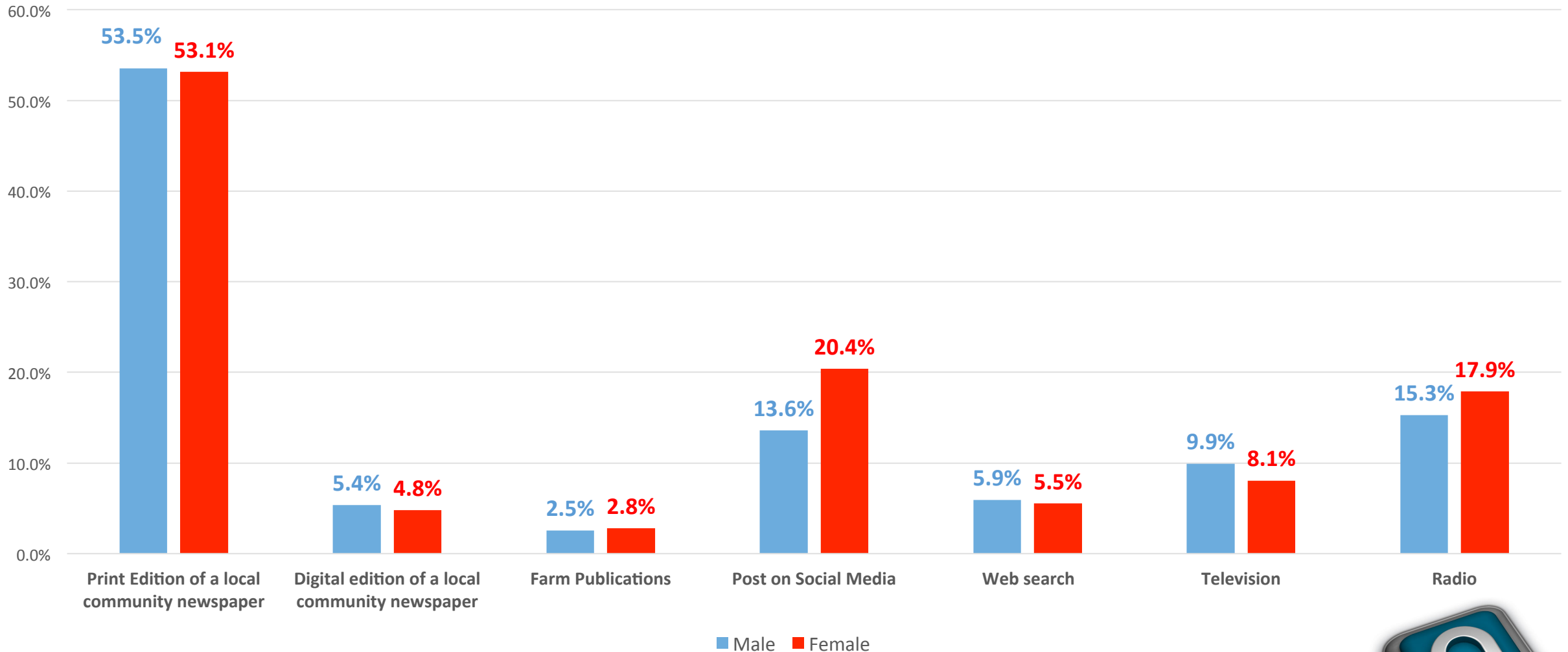


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Preferred Media to Receive News About: *Local Community Events*

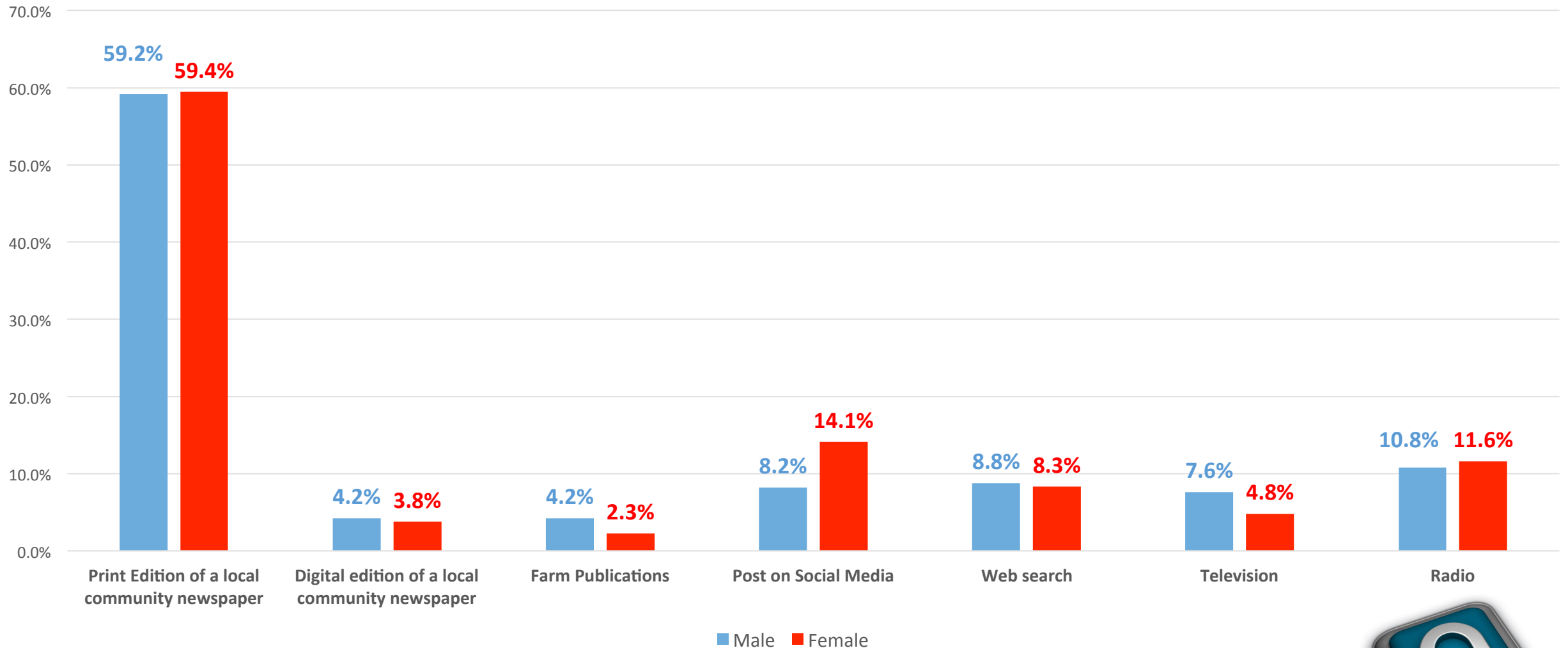


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Preferred Media to Receive News About: *Local Businesses, Sales and Events*

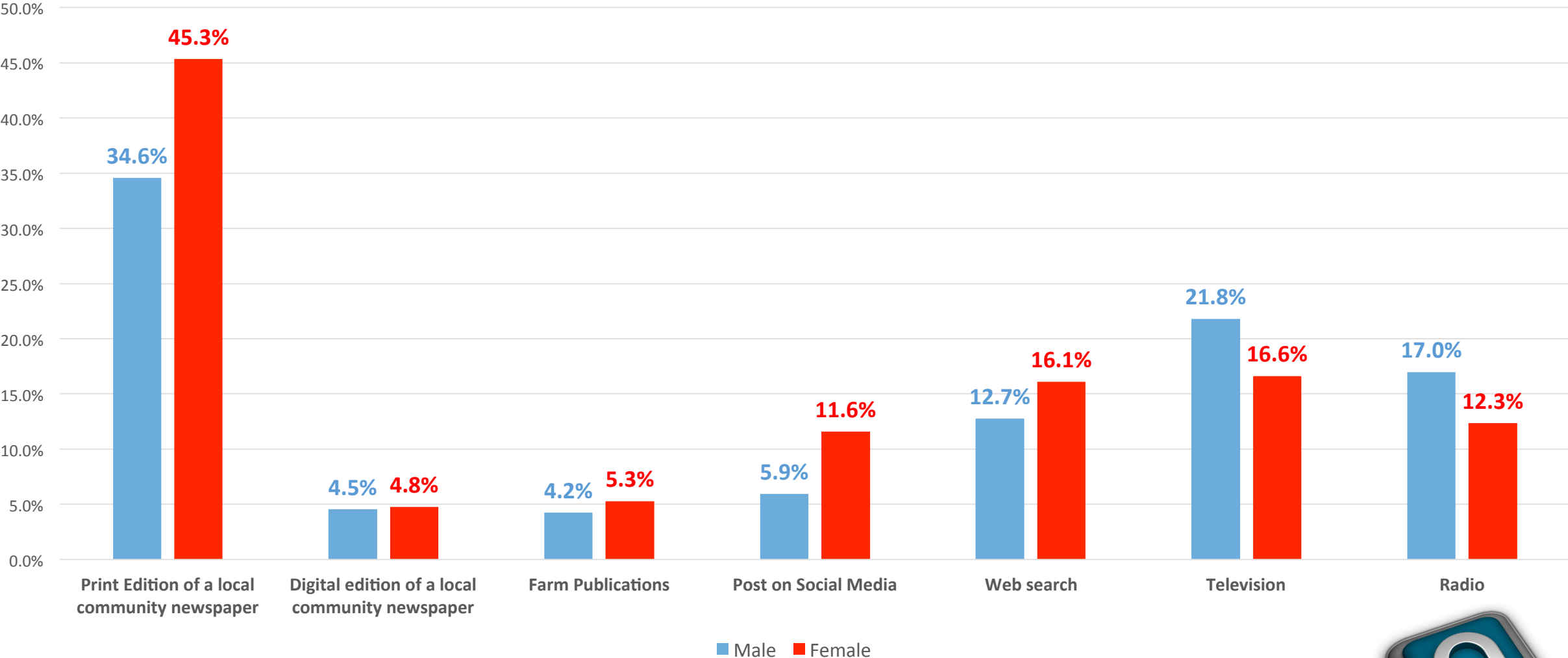


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Preferred Media to Receive News About: *Local Government Programs and Initiatives*

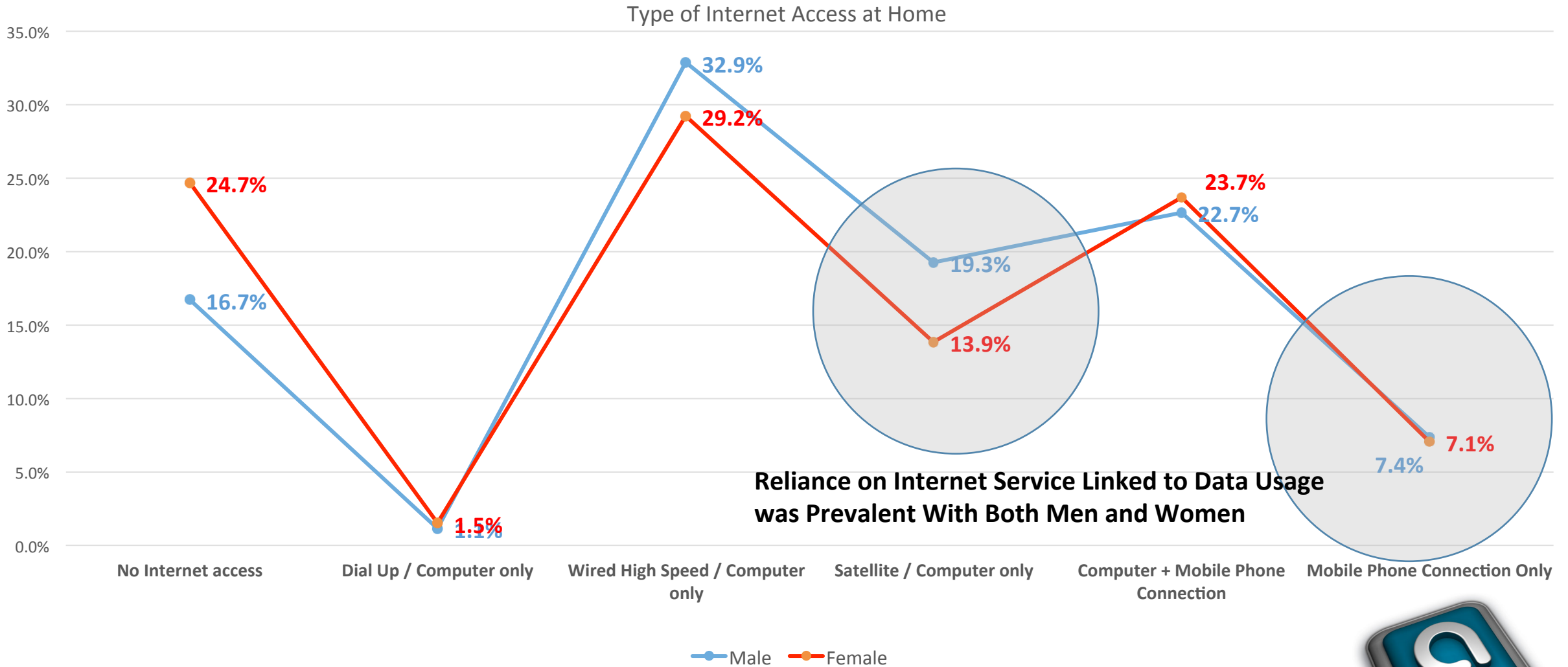


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COMMUNITY NEWSPAPERS *RESULTS*



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



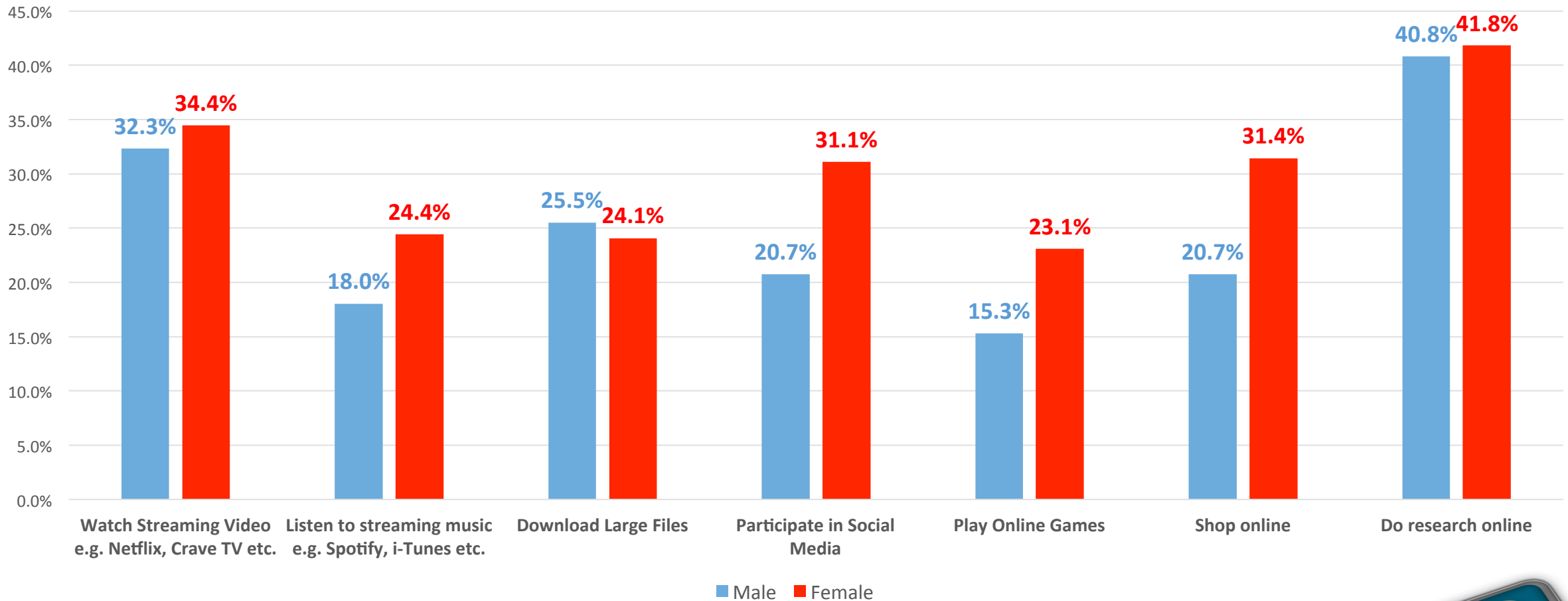
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However, Bandwidth Limits(Cost) on Certain Types of Service **Can and Does Restrict** Use on Some Activities

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



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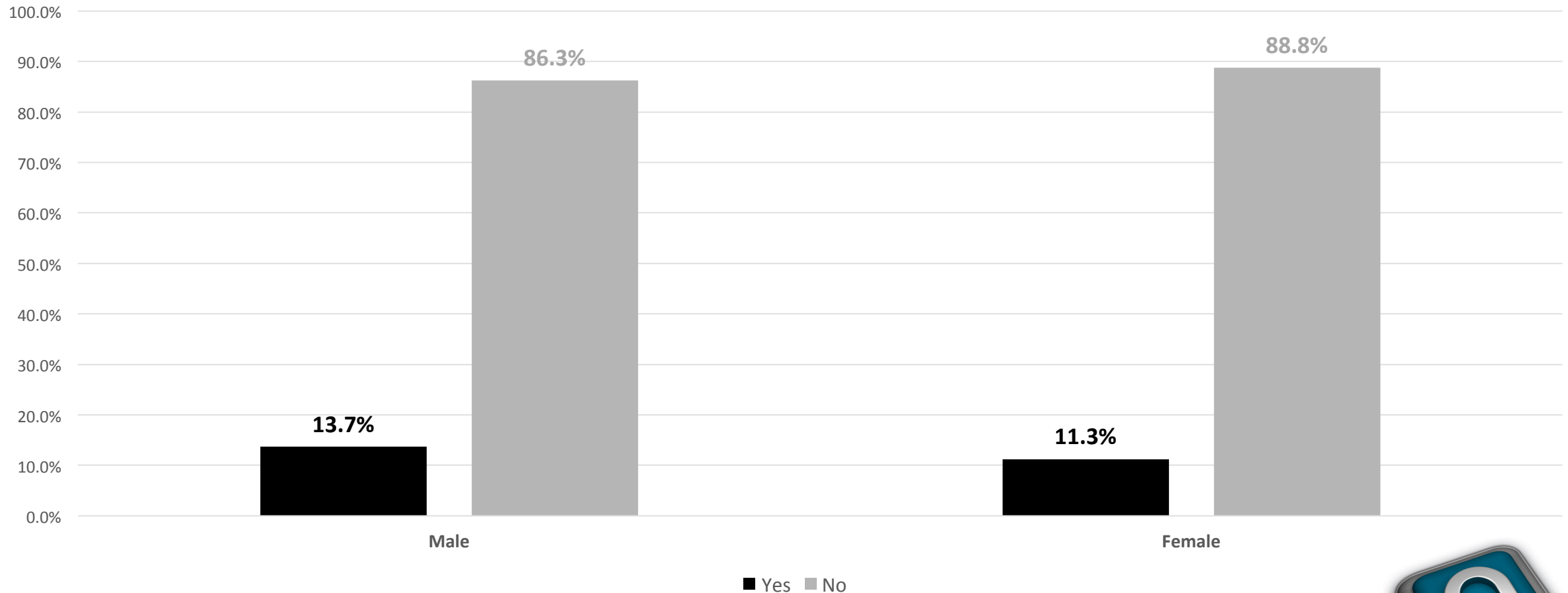
COMMUNITY NEWSPAPERS *RESULTS*



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While Women Were Slightly More Likely to Have Visited the Website of a Local Community Newspaper in the Last Week, the Numbers Were Fewer Than 1 in 8.

Visited the Website of a Local Community Newspaper in the Last Week



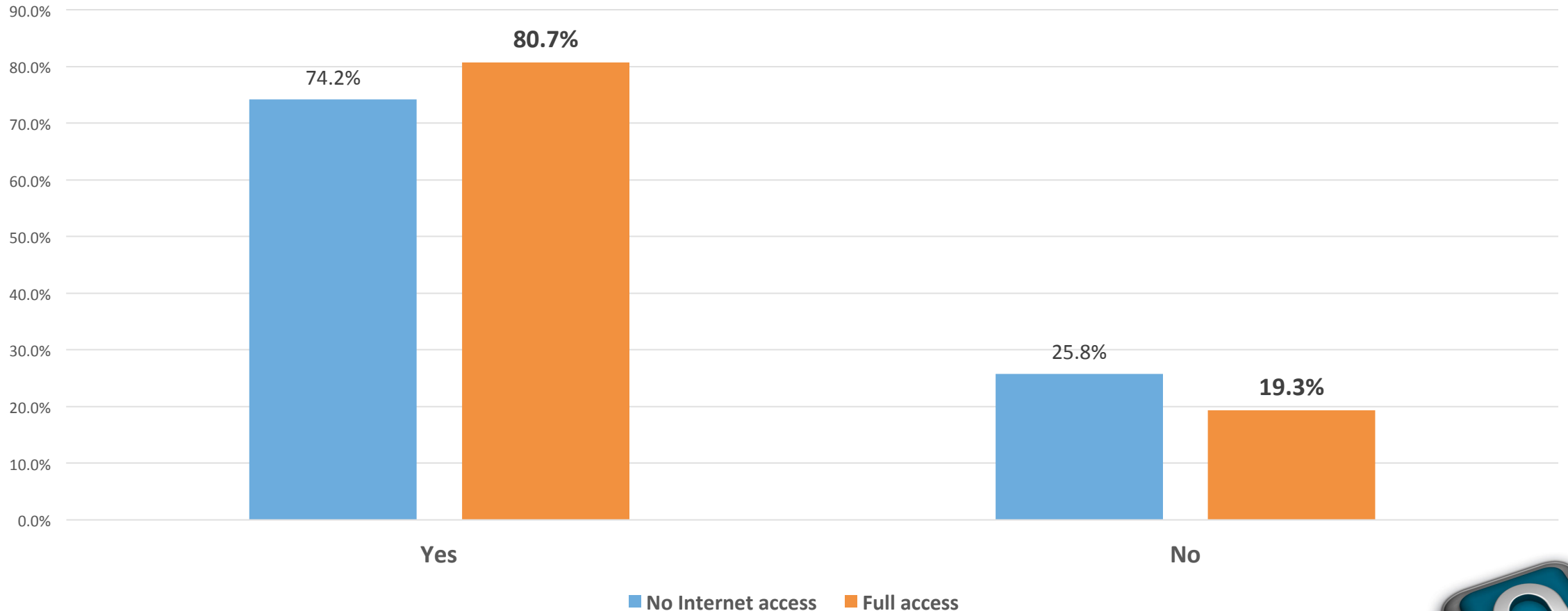
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COMMUNITY NEWSPAPERS *RESULTS*



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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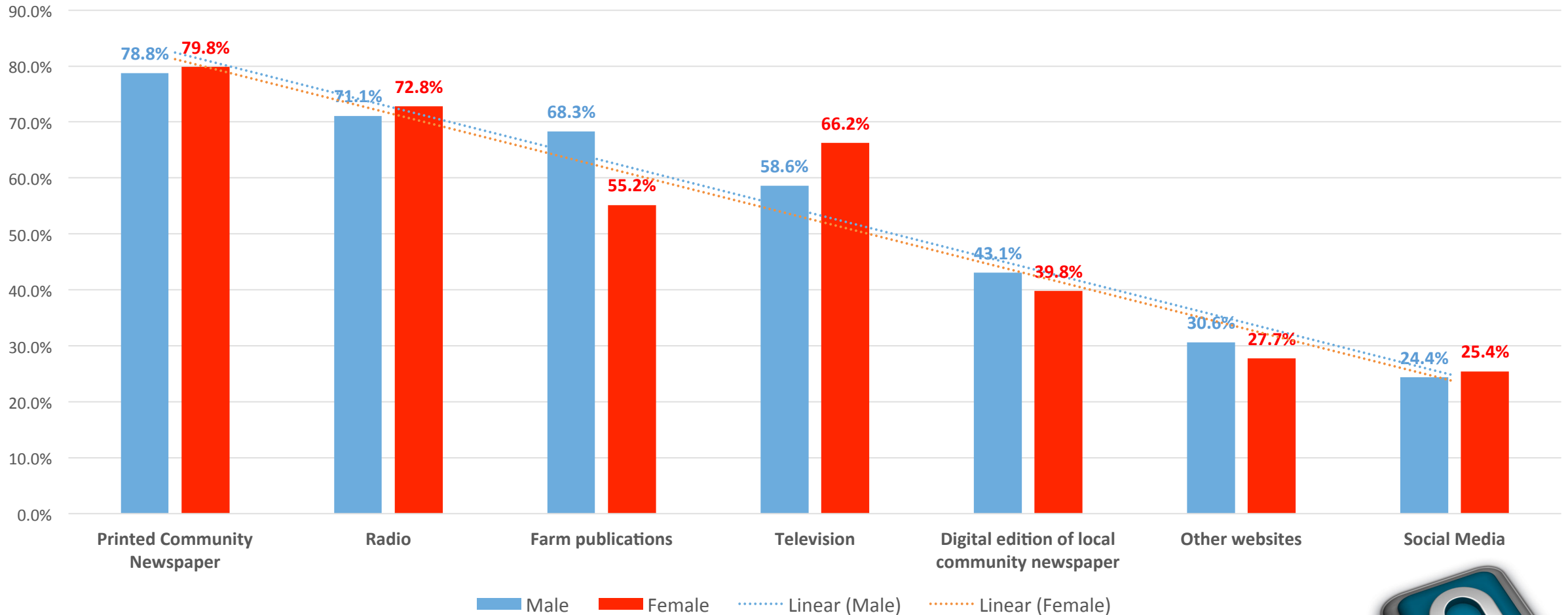
COMMUNITY NEWSPAPERS *RESULTS*



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Trust in Traditional Media is Strong Amongst Both Men and Women but Lessens for Online Media

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



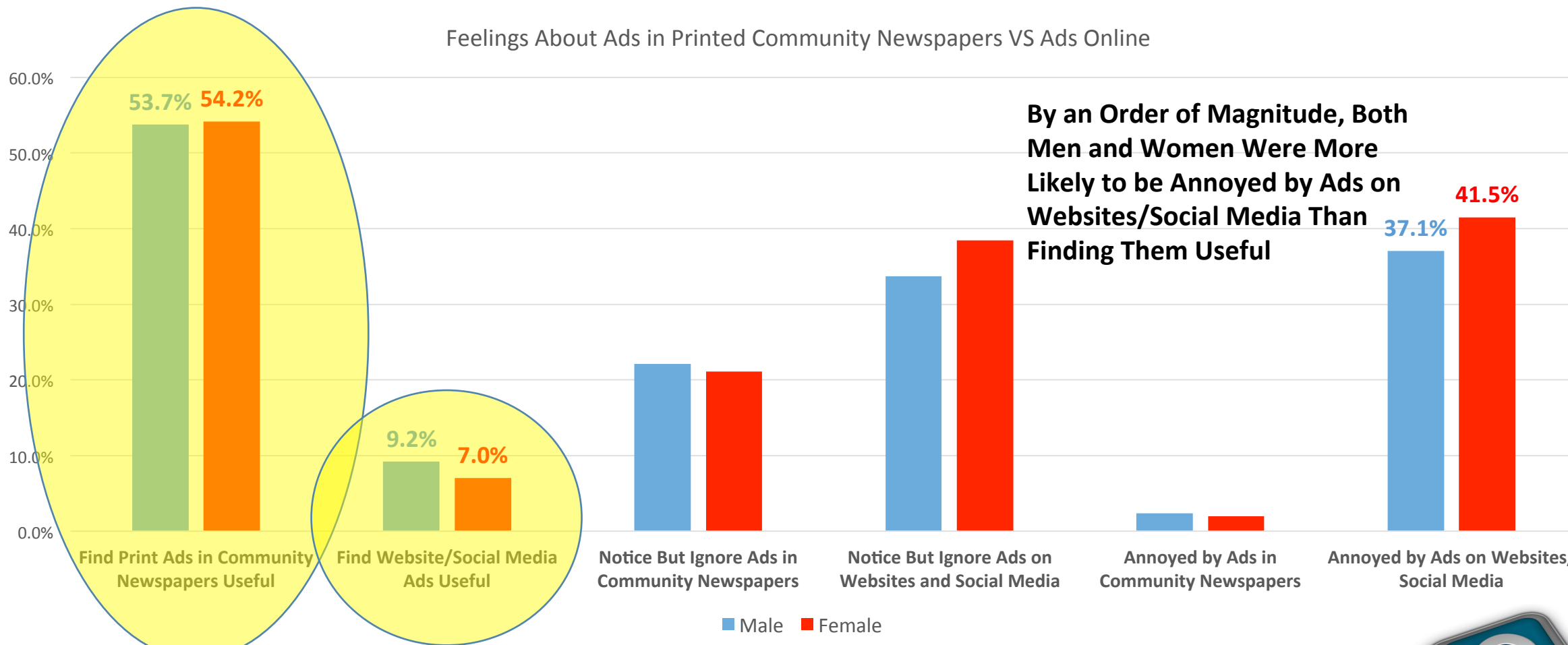
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COMMUNITY NEWSPAPERS RESULTS



Trust in News and Advertising Content of Printed Community Newspapers Leads to a Significantly Higher % of Both Men and Women Finding Print Ads Useful Than Digital Forms of Advertising

Feelings About Ads in Printed Community Newspapers VS Ads Online



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Nearly 1 in 4 Men and 1 in 5 Women 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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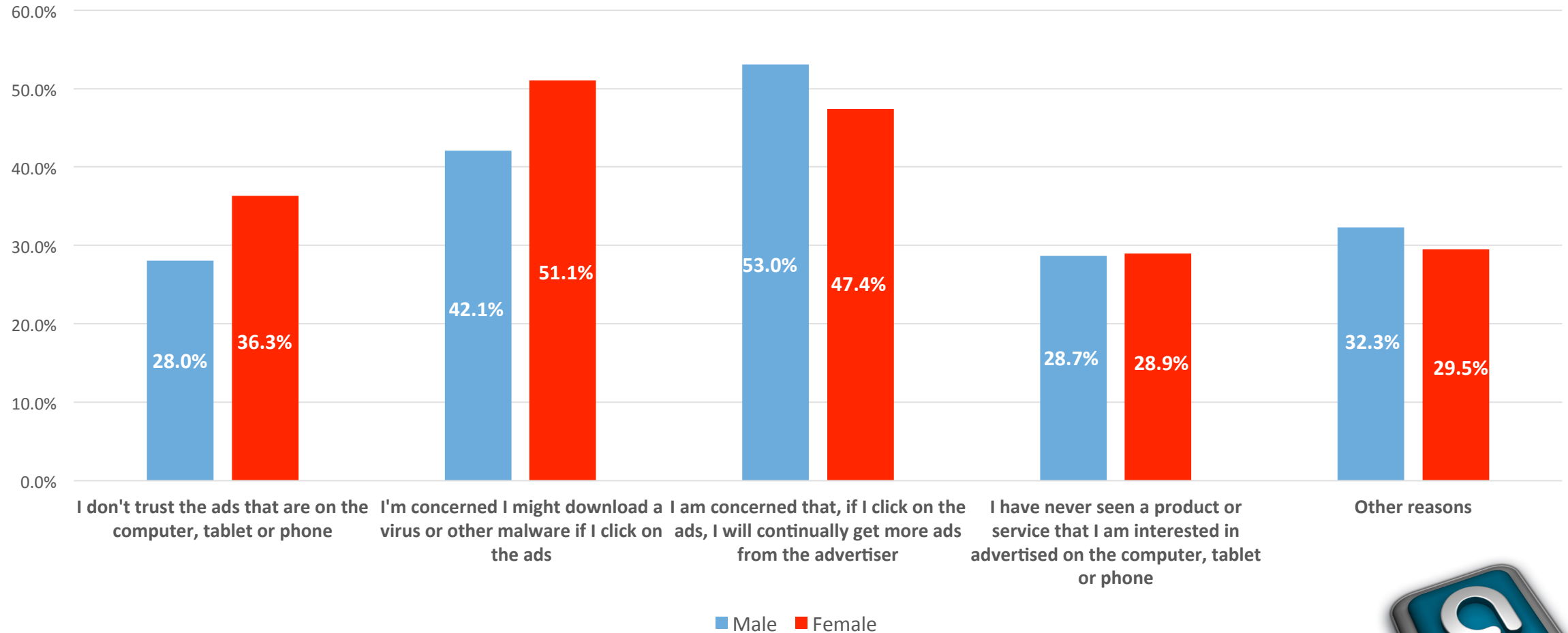
COMMUNITY NEWSPAPERS *RESULTS*



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MARKET DATA | READERSHIP INFO | RESULTS

Men Indicated Their Main Reason for Not Clicking on Website or Social Media Ads Was Concern Over Receiving More Ads From the Advertiser. The Biggest Concern of Women Was Downloading a Virus or Malware

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 Gender

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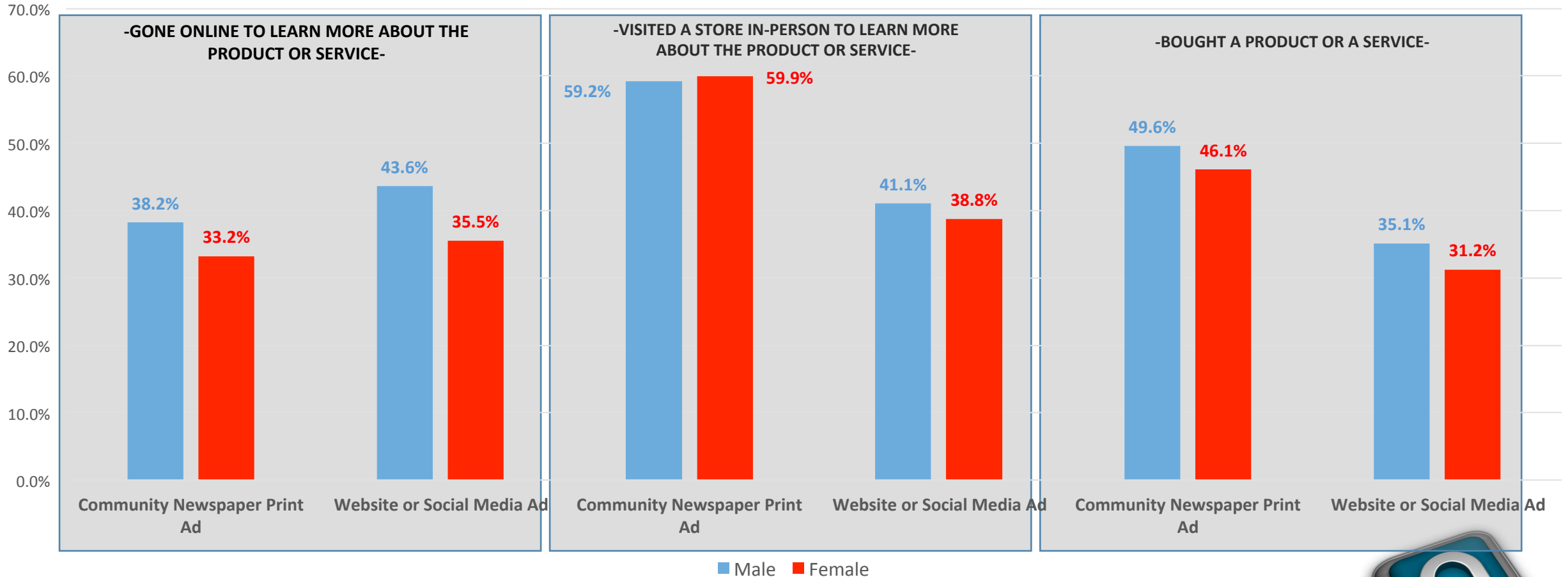
COMMUNITY NEWSPAPERS *RESULTS*



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MARKET DATA | READERSHIP INFO | RESULTS

Ads in Printed Community Newspapers Were More Likely to Drive Store Traffic or a Purchase, Ads on Websites Were Slightly More Influential in Driving Visits to Websites

Actions Taken as a Result of Seeing an Ad

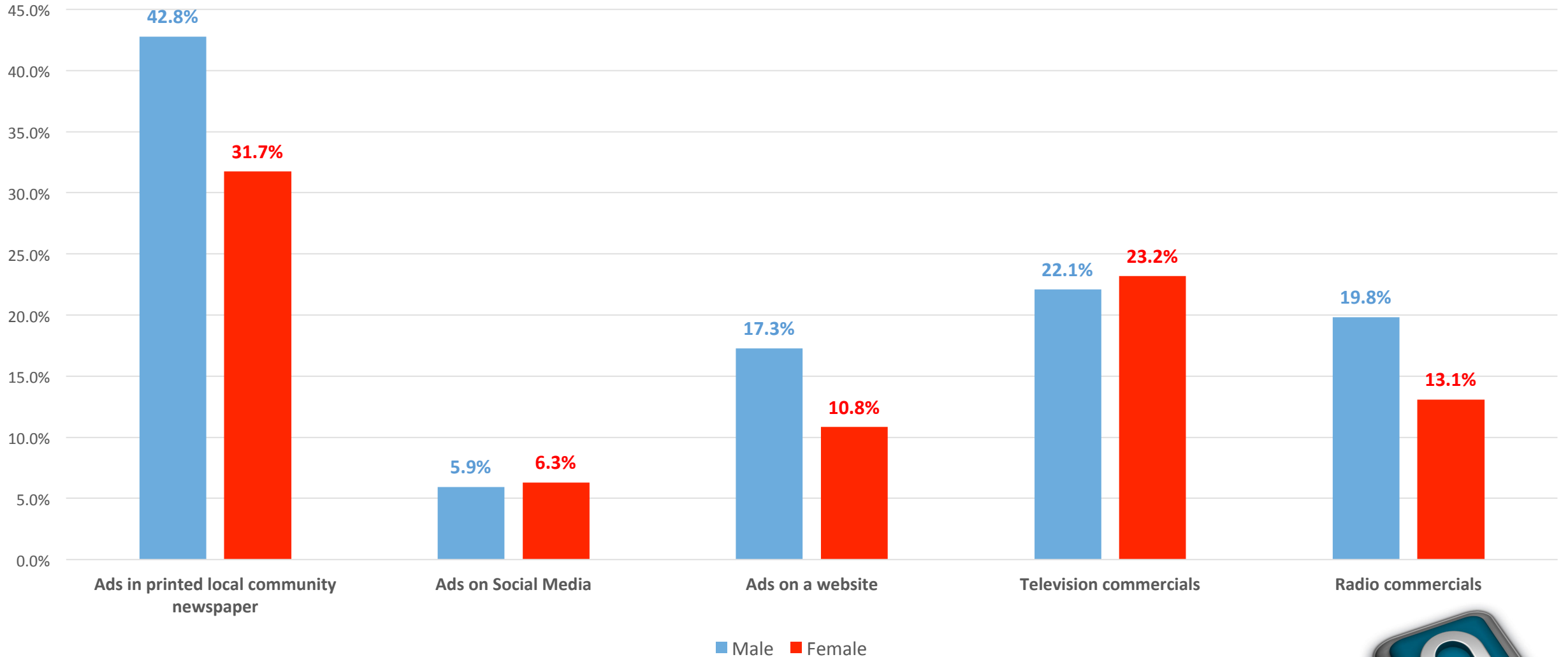


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Media Containing Ads Most Likely to Inspire Action (Store Visit, Website Visit, Purchase Decision): **AUTOMOTIVE**

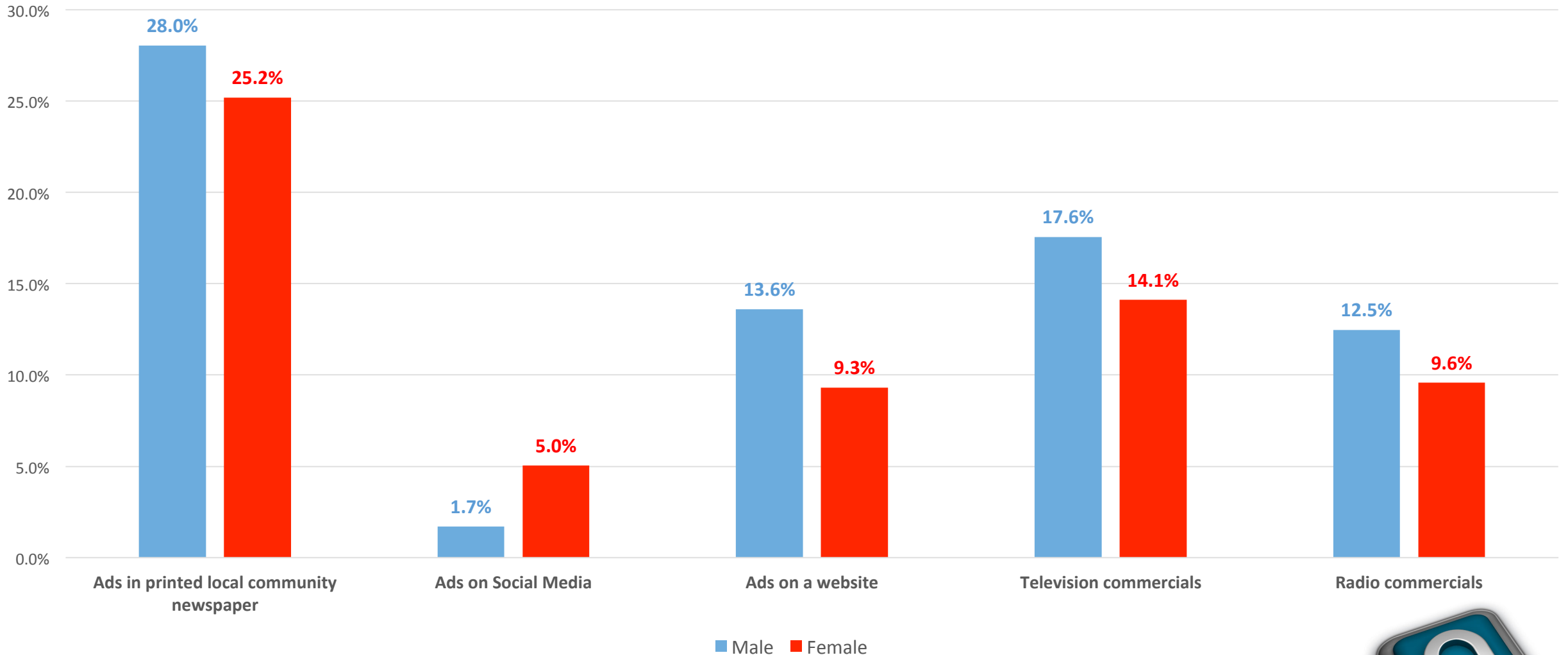


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Media Containing Ads Most Likely to Inspire Action (Store Visit, Website Visit, Purchase Decision): **FINANCIAL SERVICES**

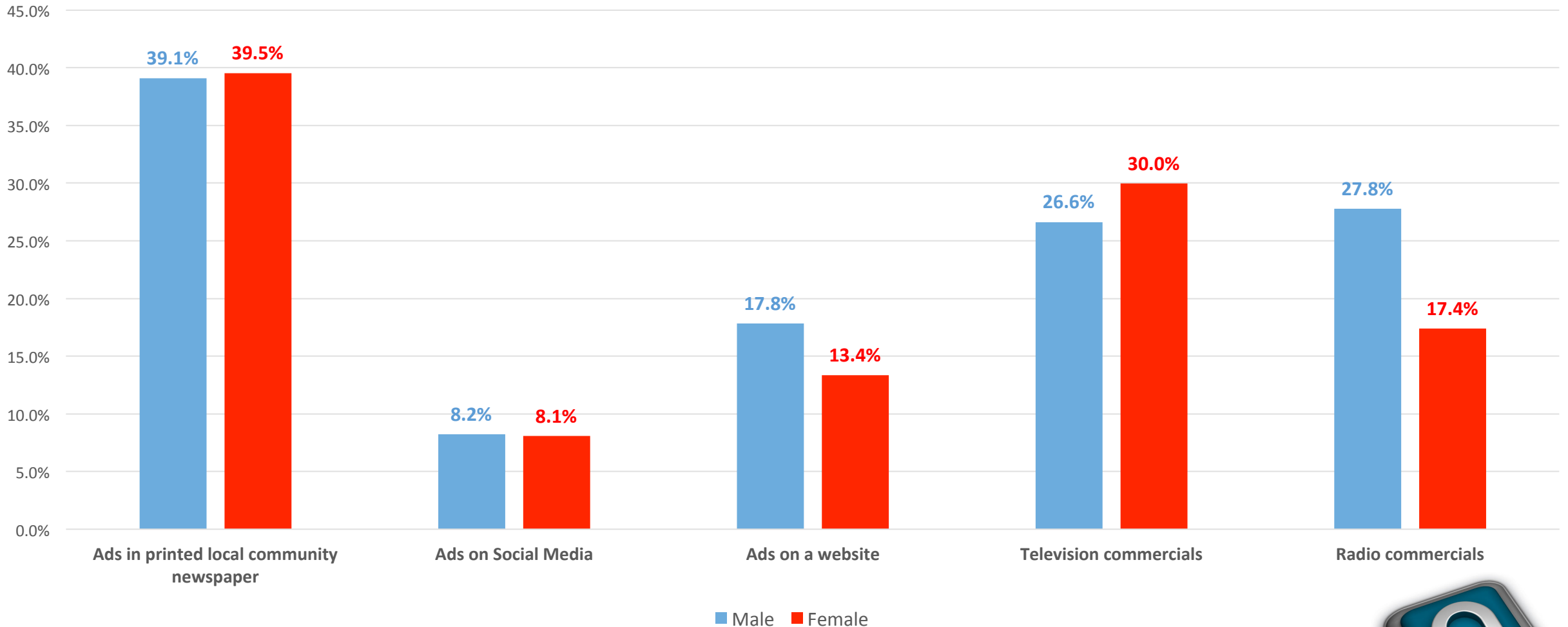


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COMMUNITY NEWSPAPERS *RESULTS*



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

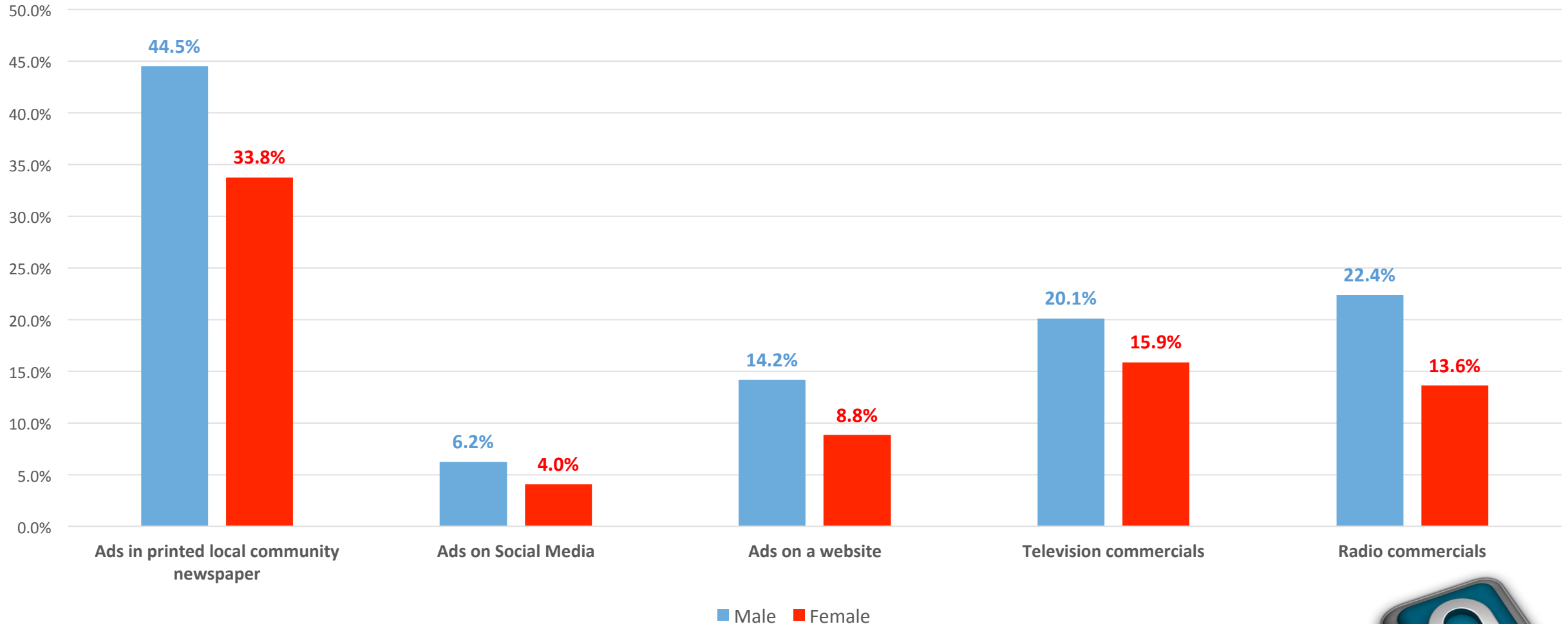


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Media Containing Ads Most Likely to Inspire Action (Store Visit, Website Visit, Purchase Decision): **AGRICULTURE AND AGRICULTURE SERVICES**

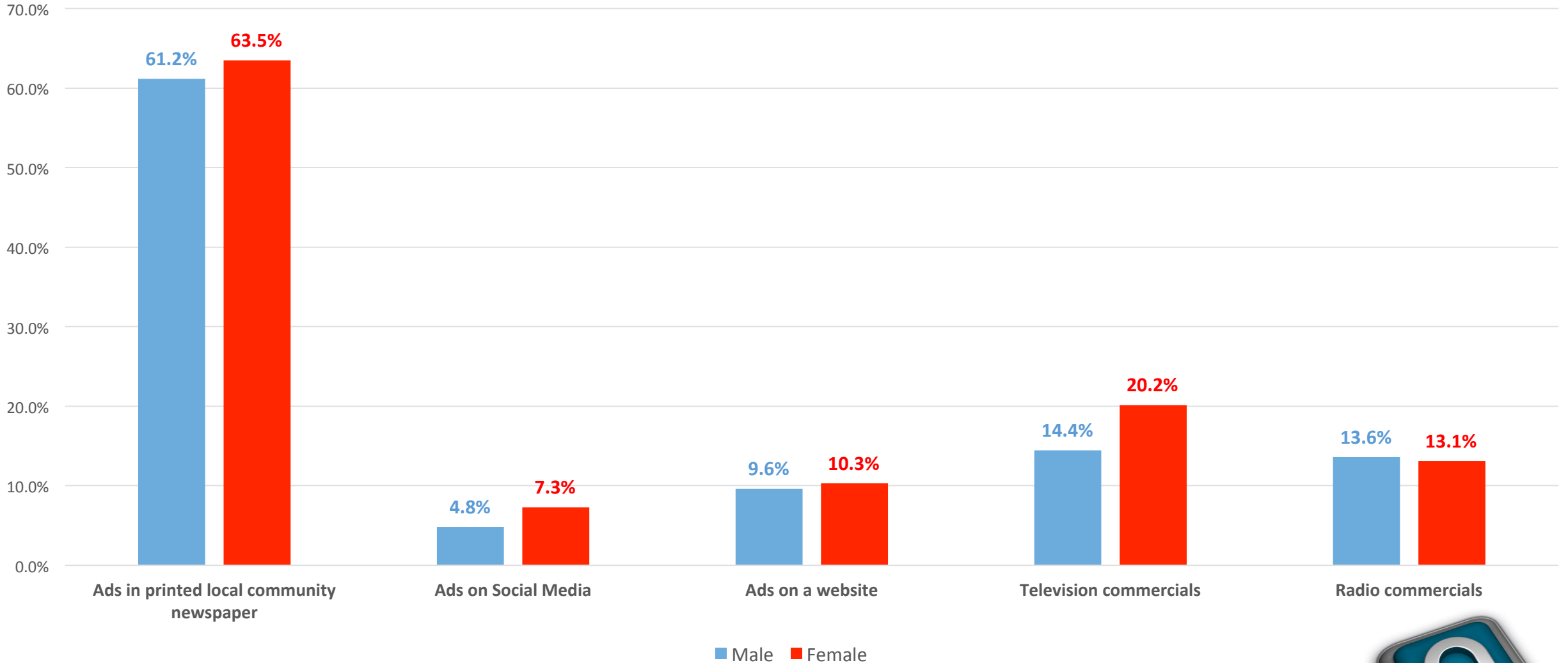


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Media Containing Ads Most Likely to Inspire Action (Store Visit, Website Visit, Purchase Decision): **FOOD AND GROCERIES**

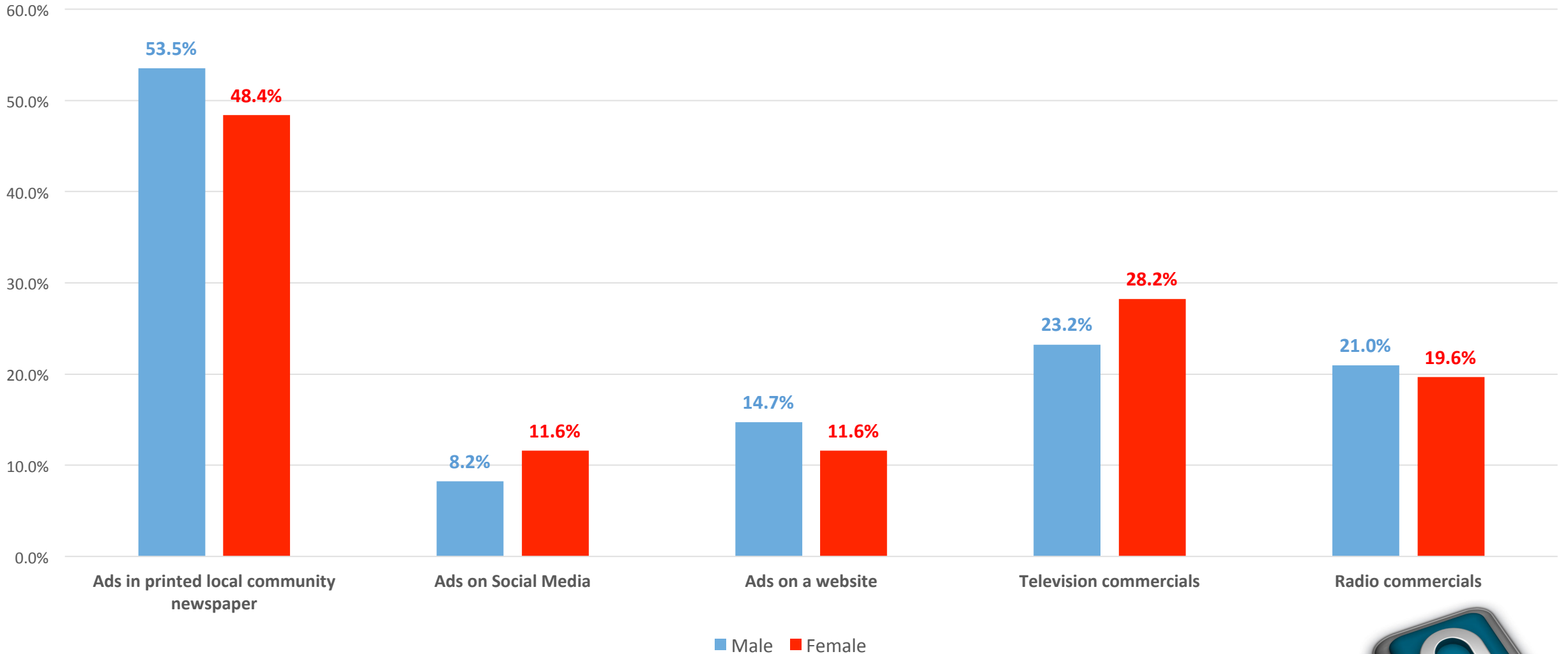


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Media Containing Ads Most Likely to Inspire Action (Store Visit, Website Visit, Purchase Decision): **RETAIL STORES**



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