

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

MANITOBA COMMUNITIES <50,000 POPULATION

Typical Community Newspaper Markets

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

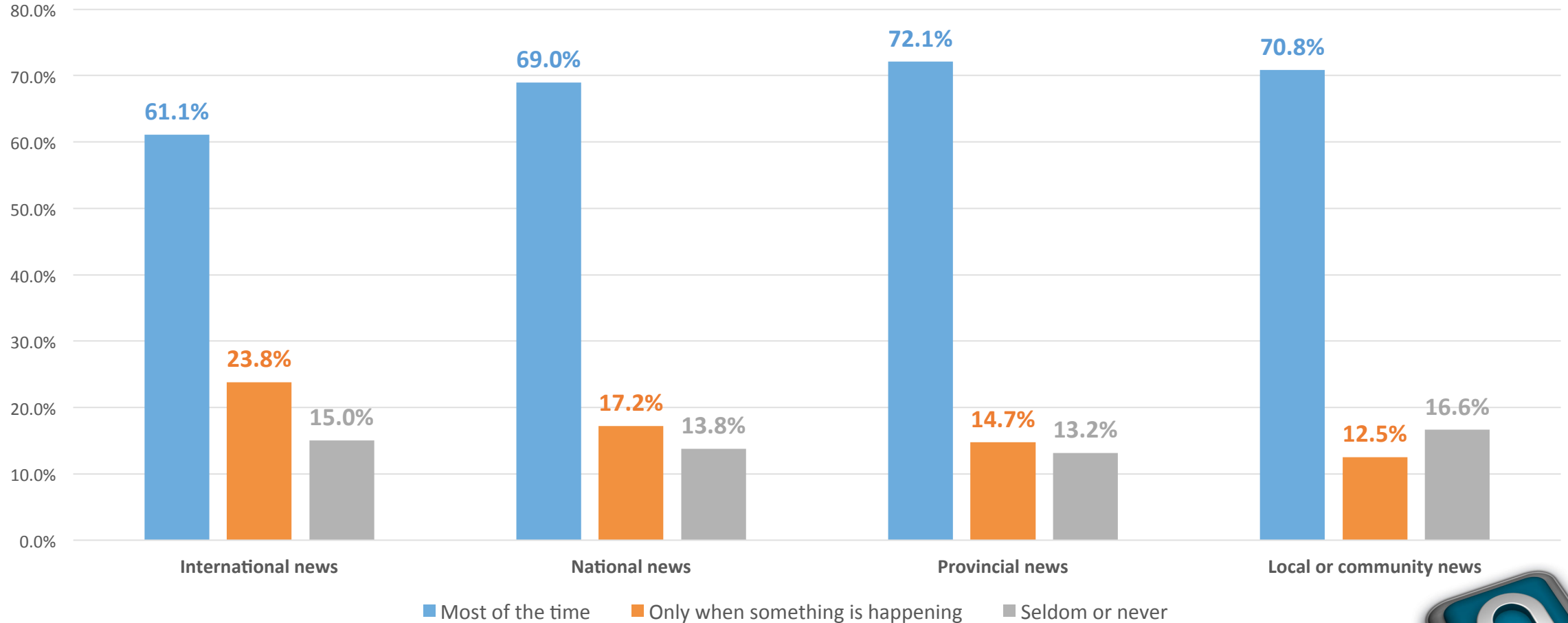
COMMUNITY NEWSPAPERS *RESULTS*



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

FOLLOW SPECIFIC TYPES OF NEWS



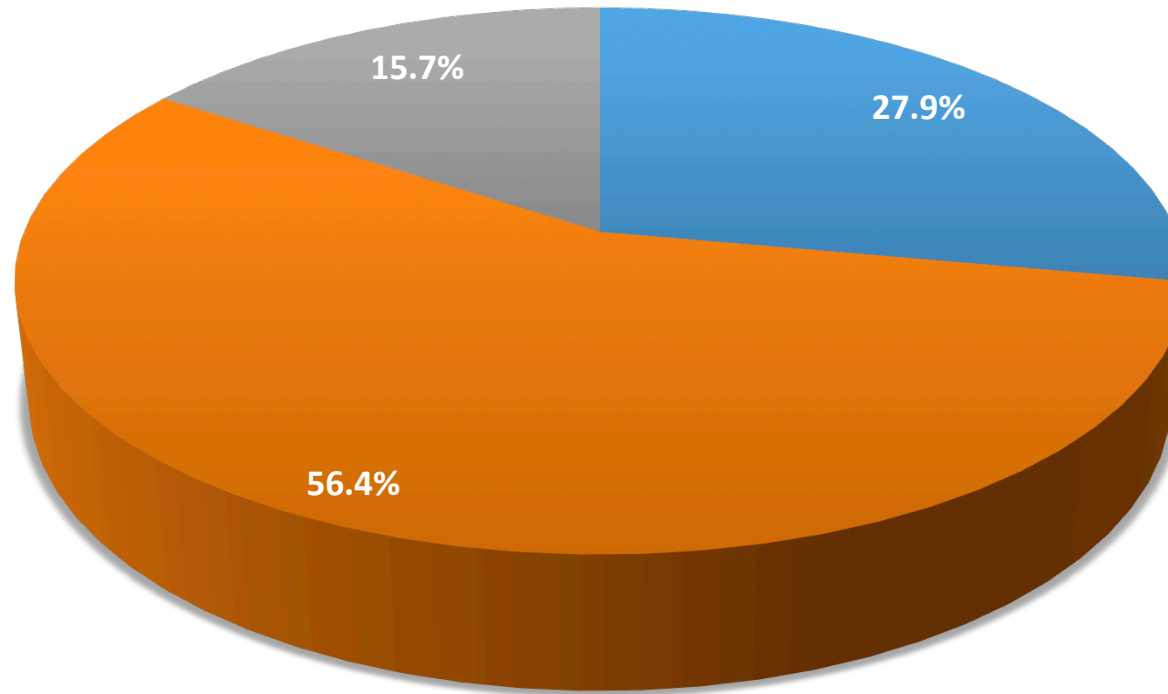
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**84% OF RESPONDENTS INDICATE SPENDING AT LEAST AS MUCH TIME WITH THE NEWS AS THEY DID TWO YEARS AGO.
NEARLY 28% REPORT SPENDING MORE TIME WITH NEWS**

TIME SPENT WITH NEWS COMPARED TO TWO YEARS AGO



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

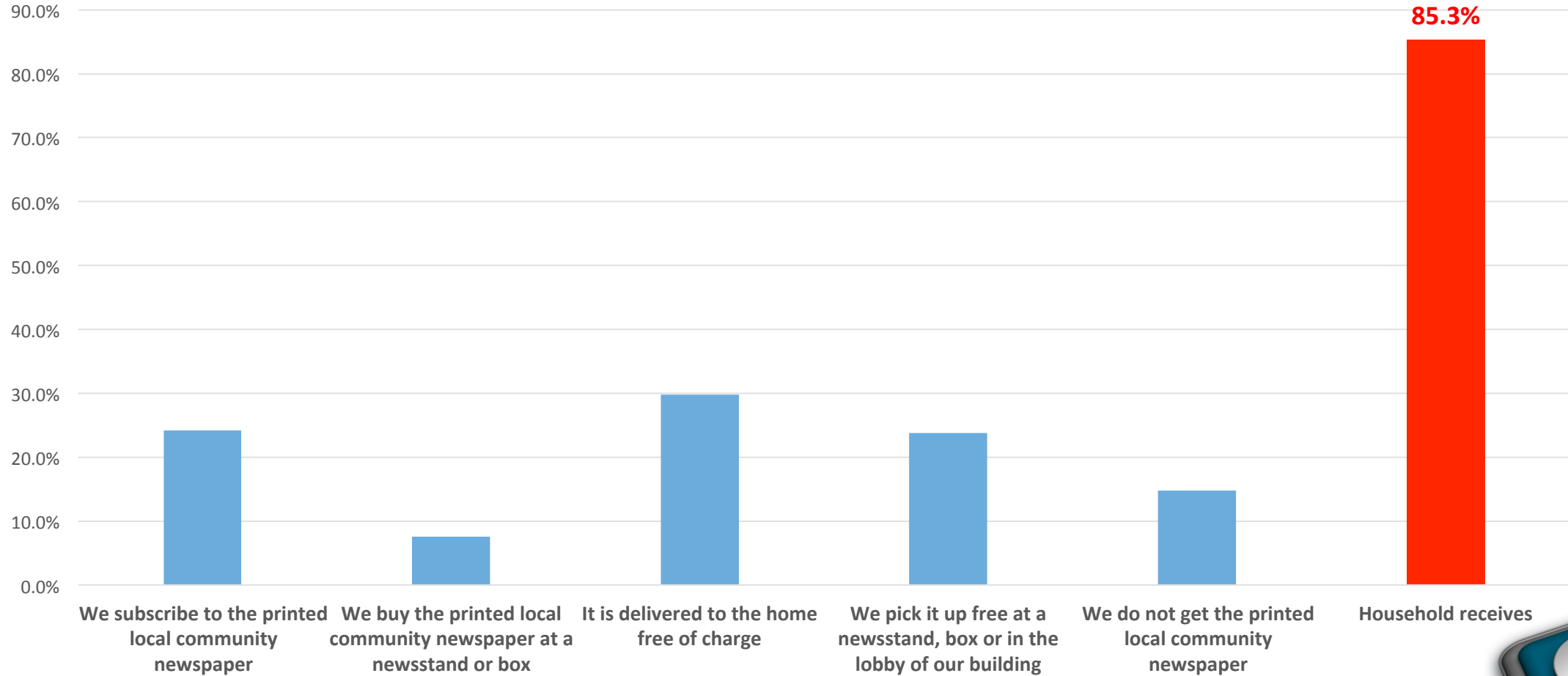
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IN 2018, 85% OF MANITOBA HOUSEHOLDS IN COMMUNITIES WITH 50,000 POPULATION AND LESS REPORT RECEIVING A PRINTED COMMUNITY NEWSPAPER AT HOME

HOUSEHOLD RECEIVERSHIP OF PRINTED COMMUNITY NEWSPAPER



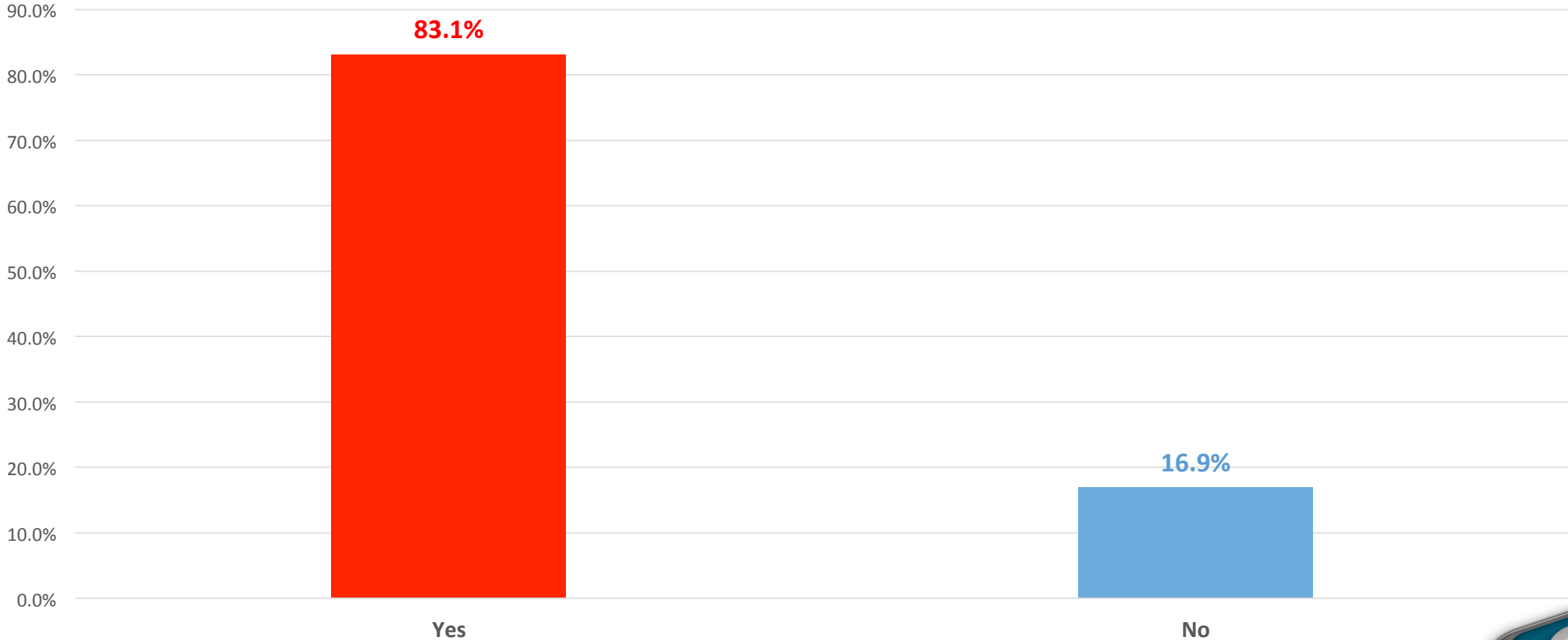
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OVER 8 IN 10 MANITOBANS LIVING OUTSIDE OF WINNIPEG REPORT HAVING READ OR LOOKED INTO A PRINTED COMMUNITY NEWSPAPER IN THE LAST WEEK

PERSONALLY READ OR LOOKED INTO A PRINTED COMMUNITY NEWSPAPER IN THE LAST 7 DAYS



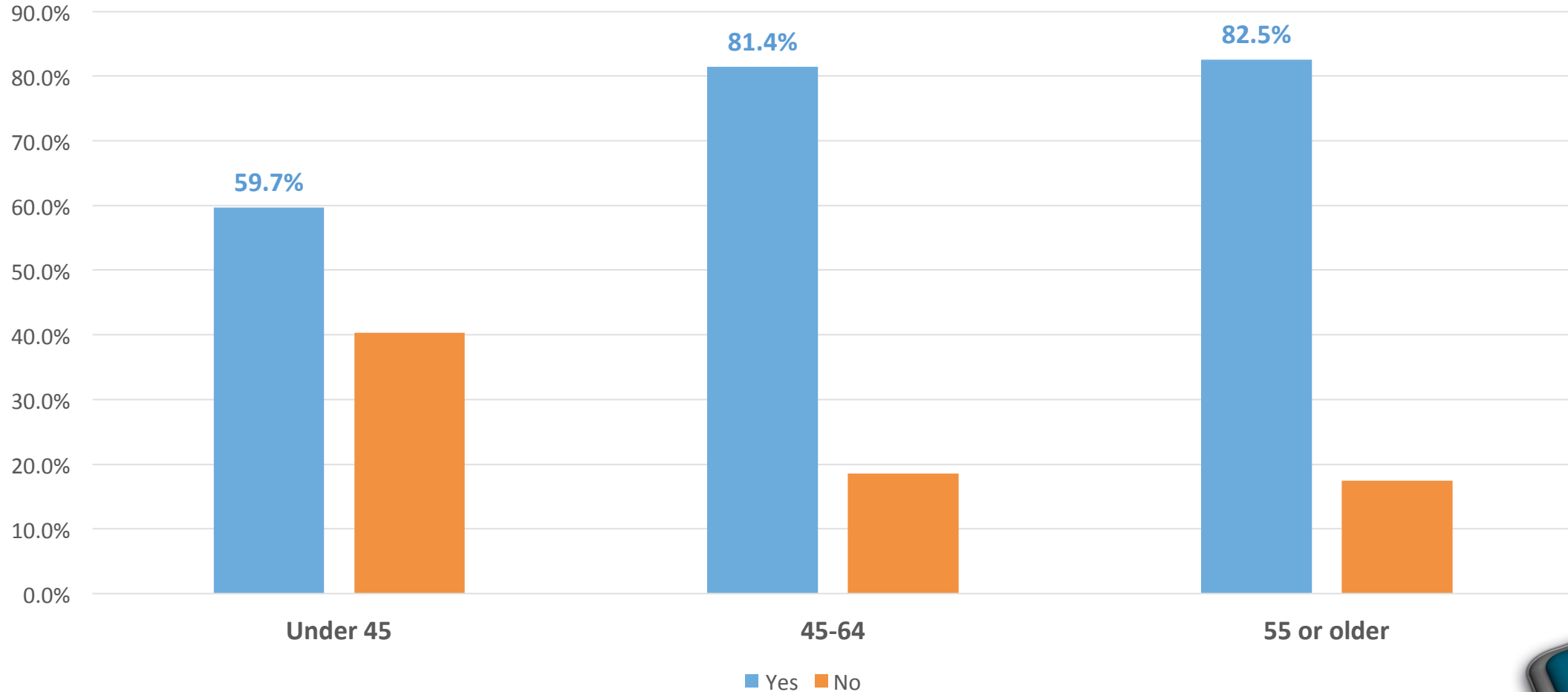
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READERSHIP OF PRINTED COMMUNITY NEWSPAPERS IS STRONG ACROSS ALL AGE DEMOGRAPHICS

PERSONALLY READ OR LOOKED INTO A PRINTED COMMUNITY NEWSPAPER IN THE LAST 7 DAYS BY AGE



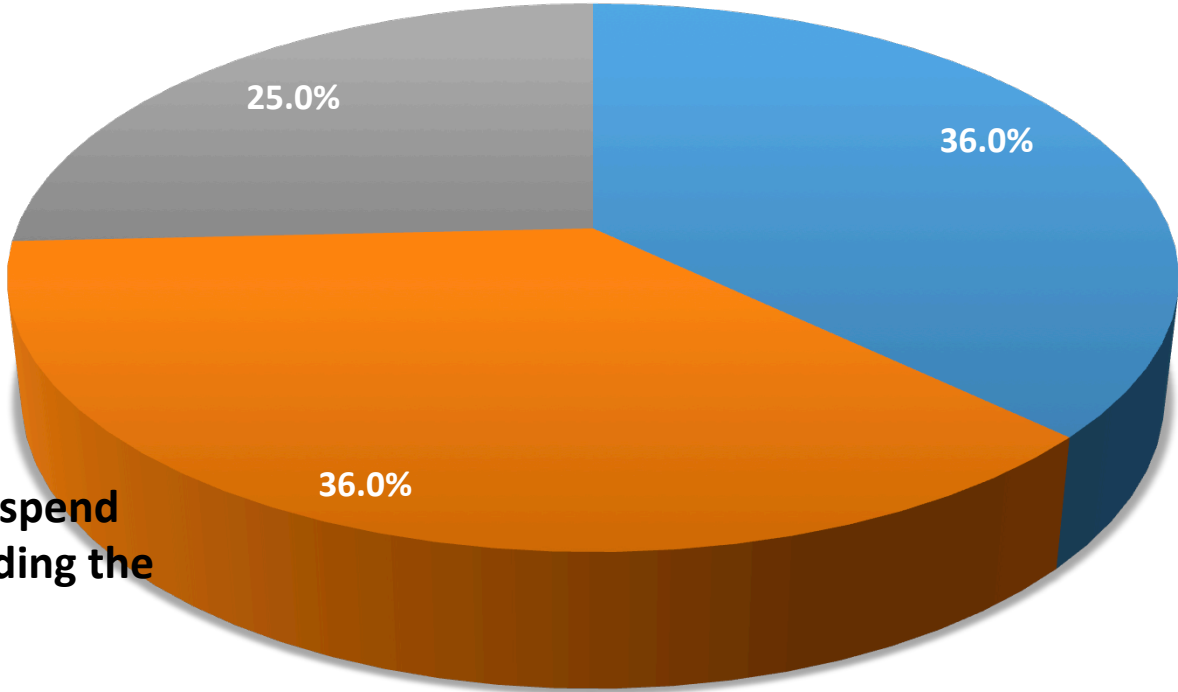
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COMMUNITY NEWSPAPERS *RESULTS*



62% of Respondents Report Spending at Least 15 Minutes Reading Their Printed Community Newspaper Each Week

TIME SPENT READING PER WEEK



On average, Manitobans spend 20 minutes per week reading the local printed community newspaper

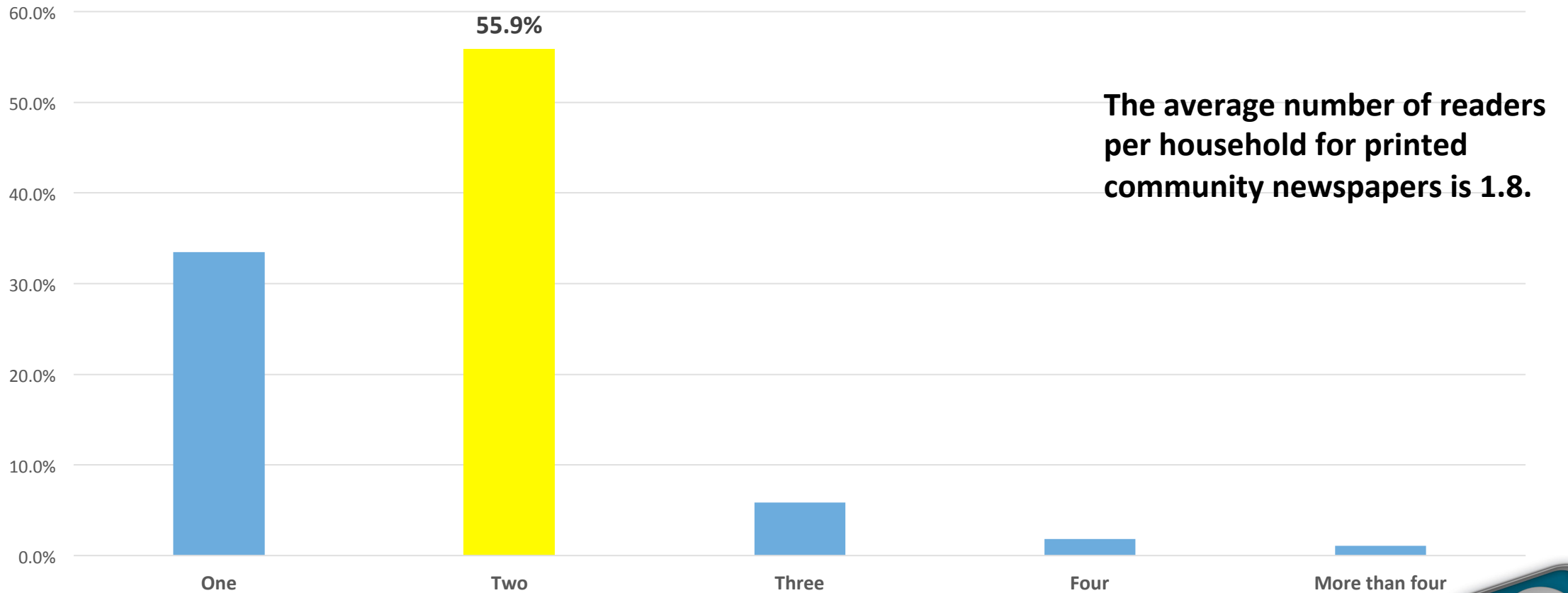
■ 15 mins or less ■ 16-30 mins ■ More than 30 minutes

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In Over Half of Households, Two People Read the Printed Community Newspaper Each Week

OF PEOPLE IN HOUSEHOLD THAT WOULD TYPICALLY LOOK INTO A PRINTED COMMUNITY NEWSPAPER EACH WEEK



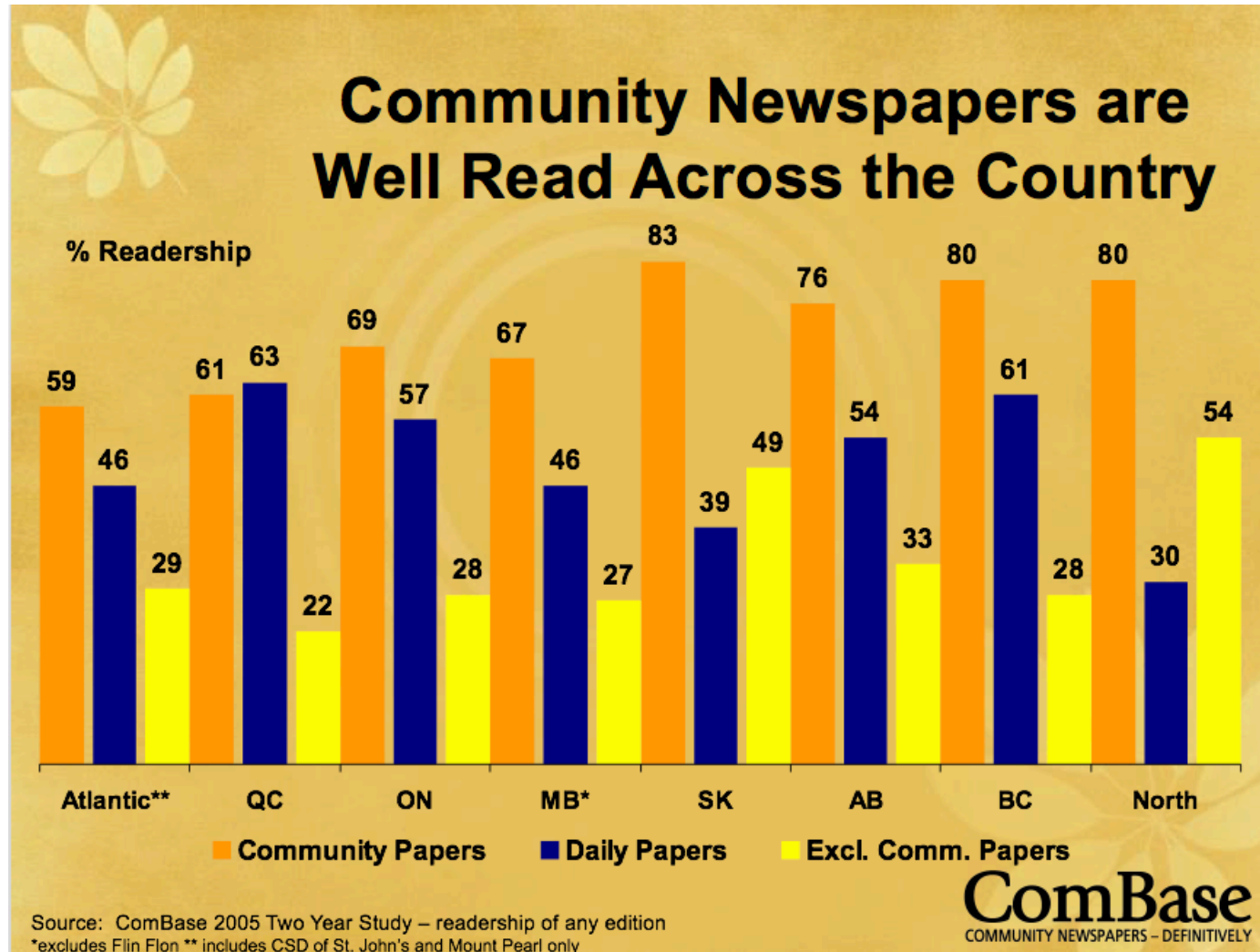
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In 2005, the National Community Newspaper Readership Study (ComBase) Reported Readership of Community Newspapers in Manitoba at 67% and Saskatchewan at 83%



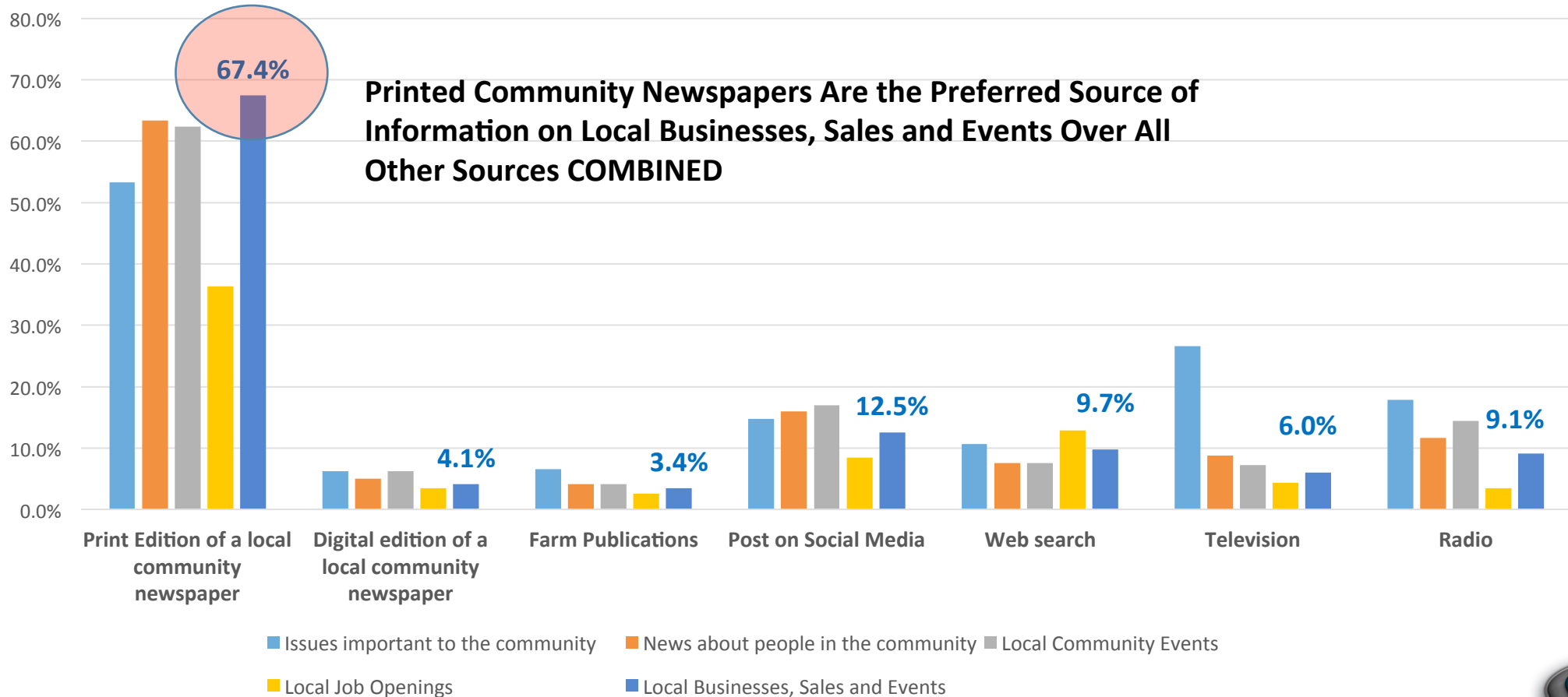
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PRINTED LOCAL COMMUNITY NEWSPAPERS ARE THE PREFERRED MEDIA TO RECEIVE INFORMATION ABOUT TOPICS HAVING LOCAL RELEVANCE TO THEM

PREFERRED MEDIA TO RECEIVE SPECIFIC TYPES OF INFORMATION

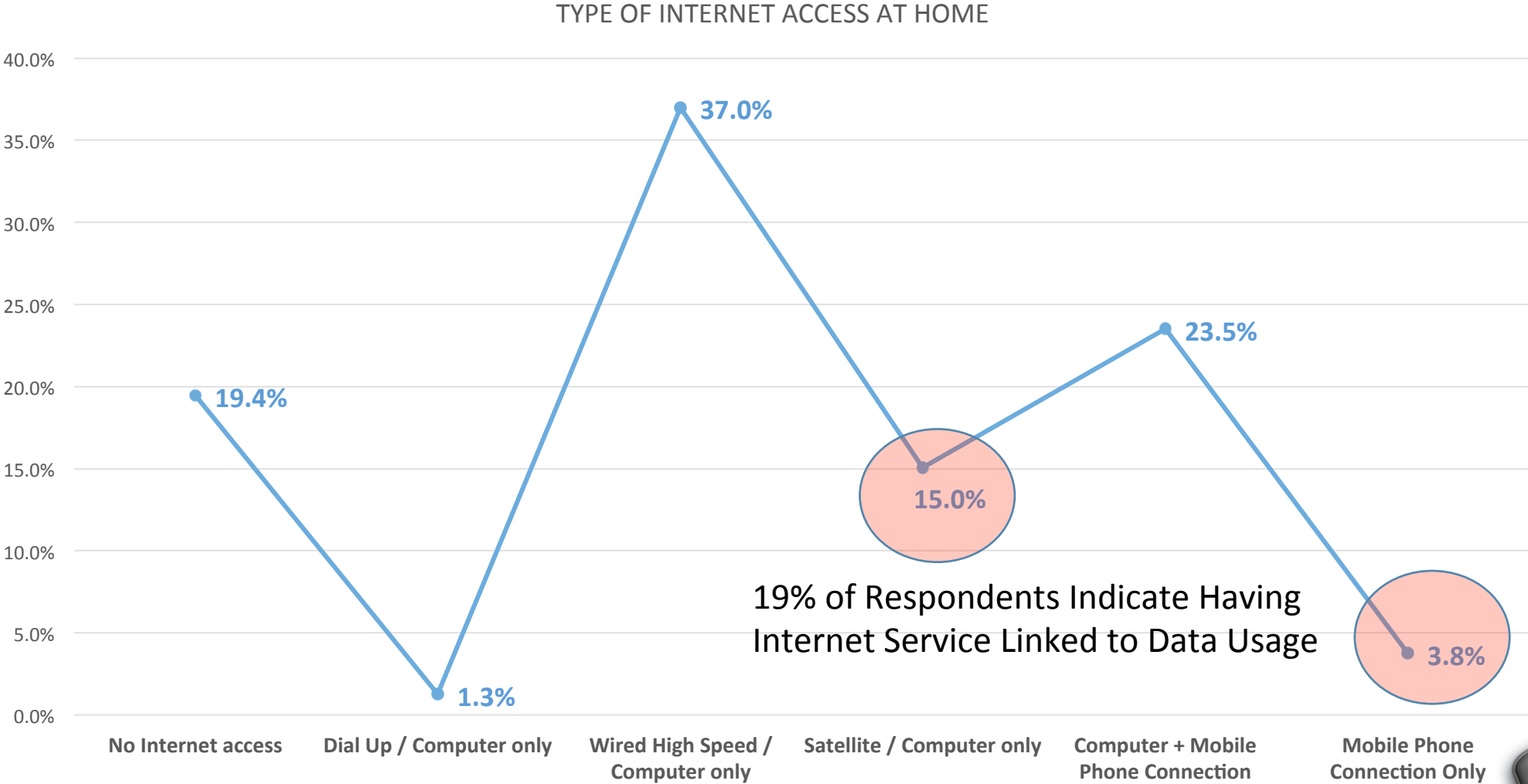


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Most Households Indicate Some Form of High Speed Internet Access, Although the Type of Service Varies



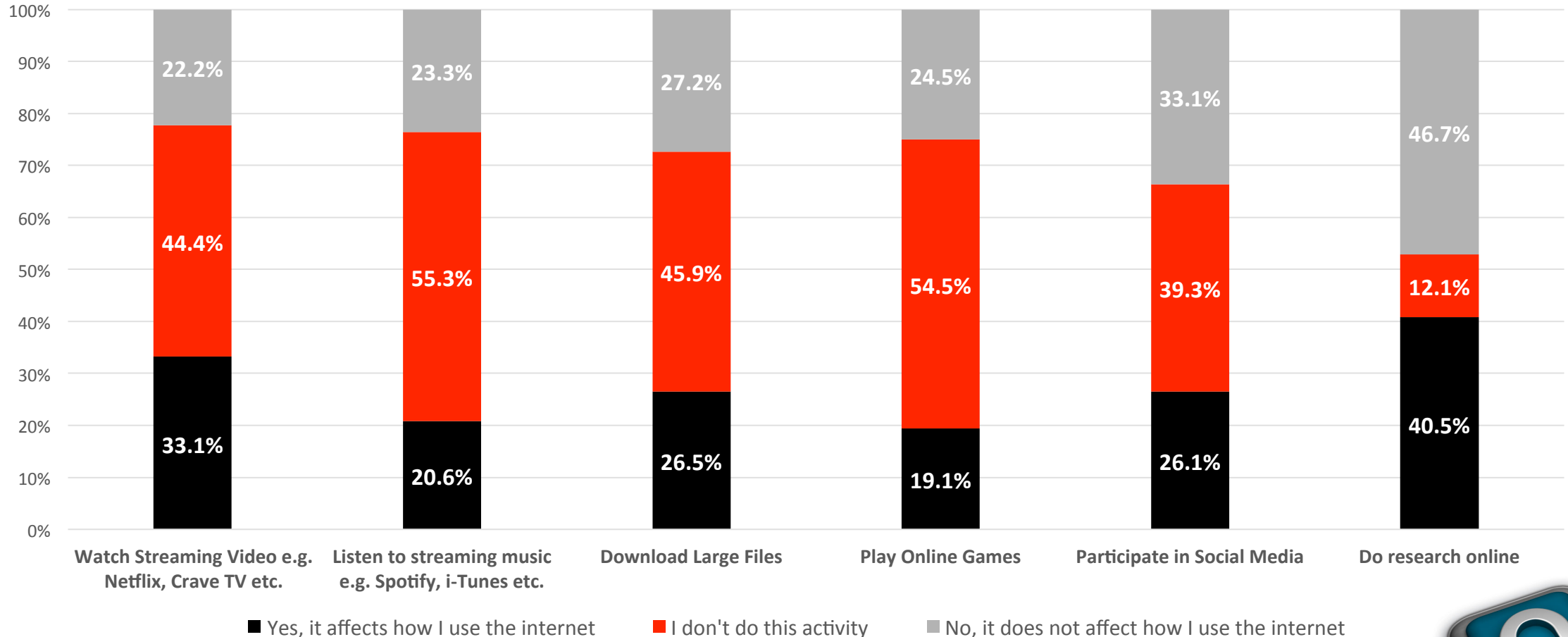
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However, Bandwidth Limits(Cost) on Certain Types of Service **Can and Does Restrict** Use on Some Activities

DOES YOUR INTERNET CONNECTION AT HOME AFFECT YOUR ABILITY TO DO CERTAIN ACTIVITIES ONLINE



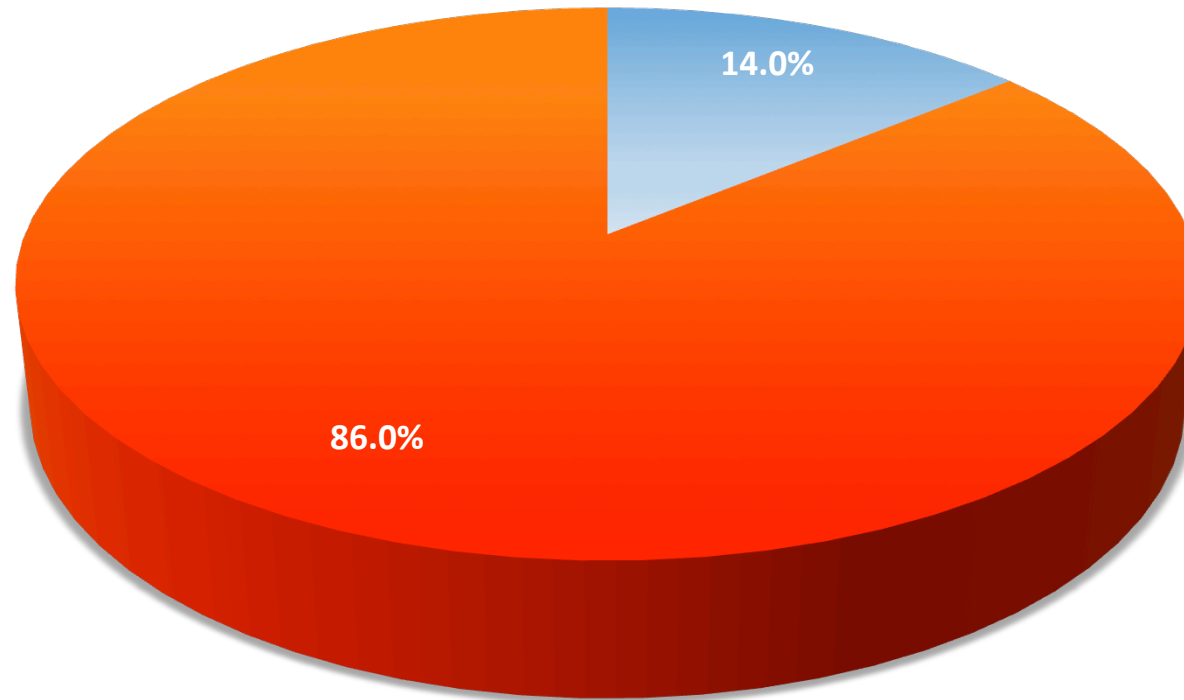
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COMMUNITY NEWSPAPERS *RESULTS*



Another Activity That Respondents Aren't Likely to be Doing in Rural Manitoba, is Visiting the Website of a Local Community Newspaper

HAVE YOU PERSONALLY VISITED THE WEBSITE OF A LOCAL COMMUNITY NEWSPAPER IN THE LAST WEEK?



■ Yes ■ No

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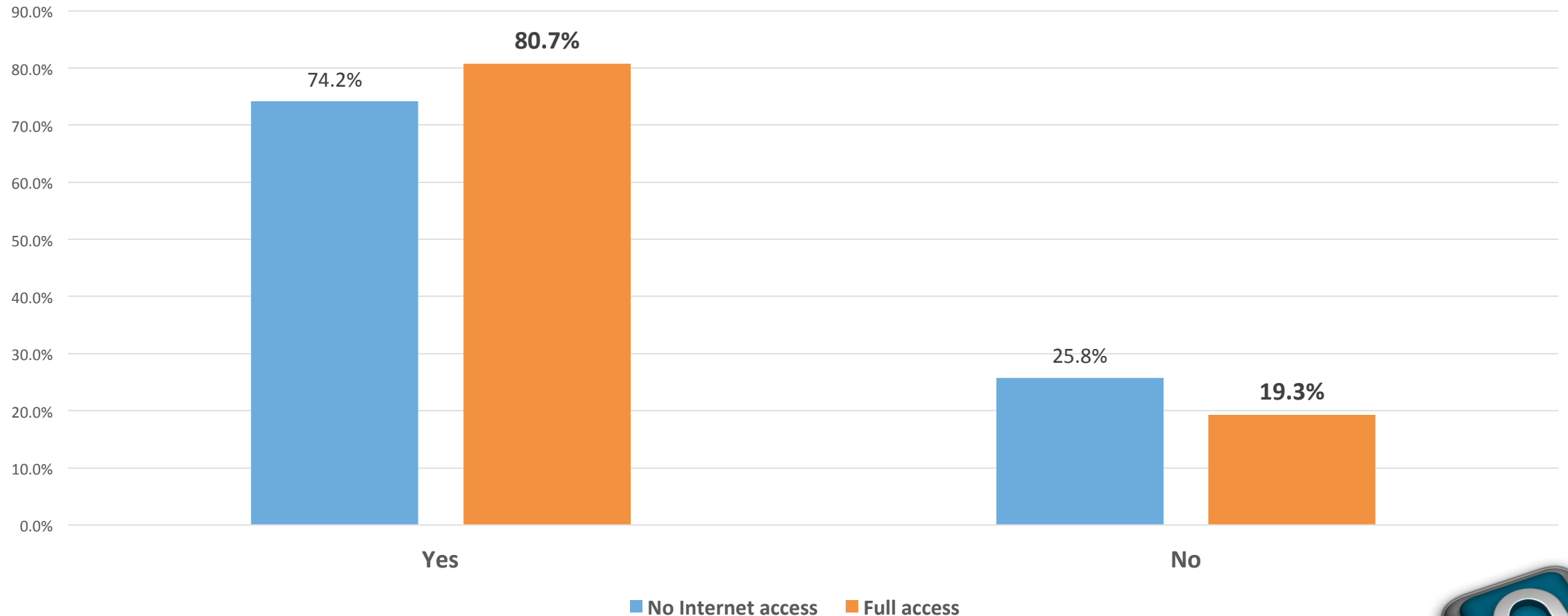
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People With Internet Access Are Actually **MORE LIKELY** to Have Read or Looked Into a Printed Community Newspaper in the Last Week Than People Without Internet Access

READ OR LOOKED INTO A PRINTED COMMUNITY NEWSPAPER IN THE LAST WEEK BY INTERNET ACCESS AT HOME



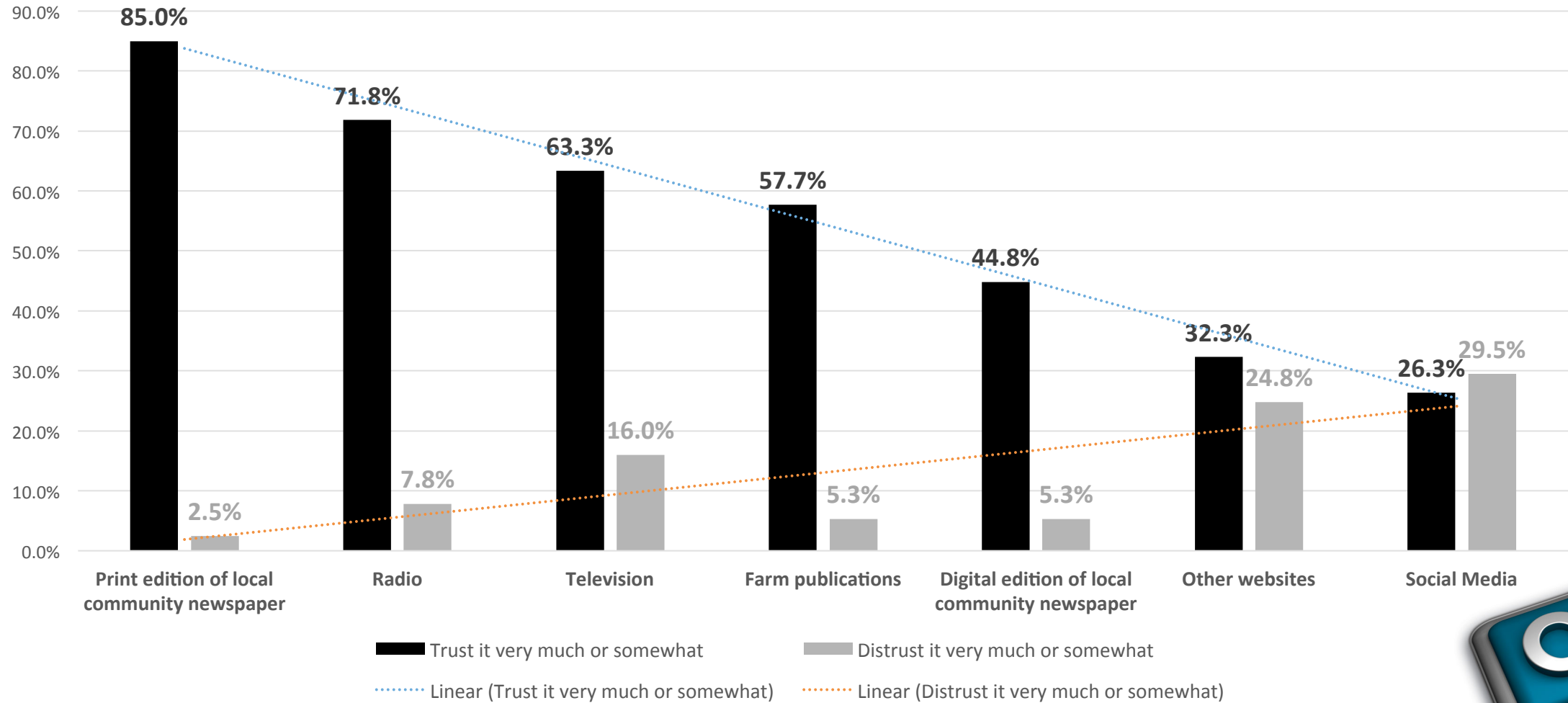
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Respondents Indicate **Significant Trust in Traditional Media** and Notable Levels of **Distrust in Both Social Media and Other Websites**

TRUST IN MEDIA'S NEWS AND ADVERTISING CONTENT



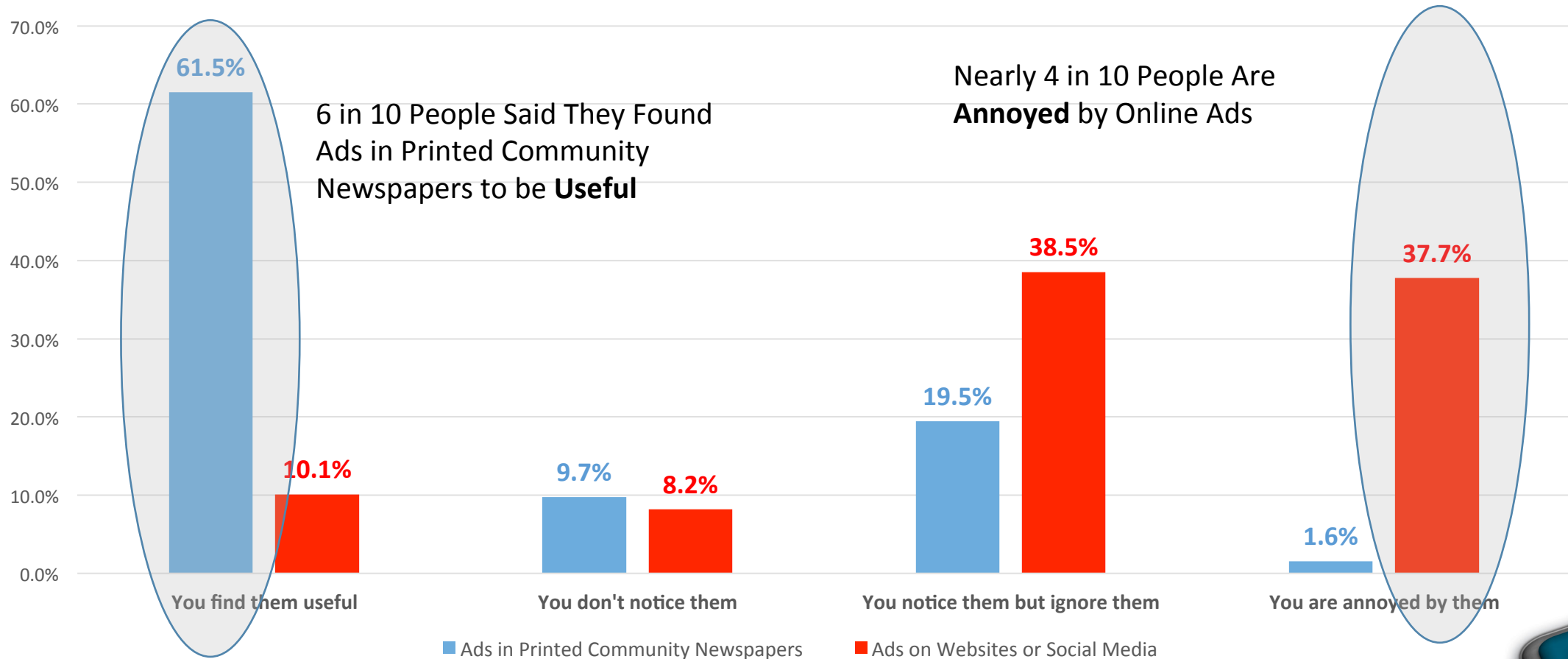
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COMMUNITY NEWSPAPERS *RESULTS*



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

FEELINGS ABOUT AD IN PRINTED NEWSPAPERS VS ONLINE ADS



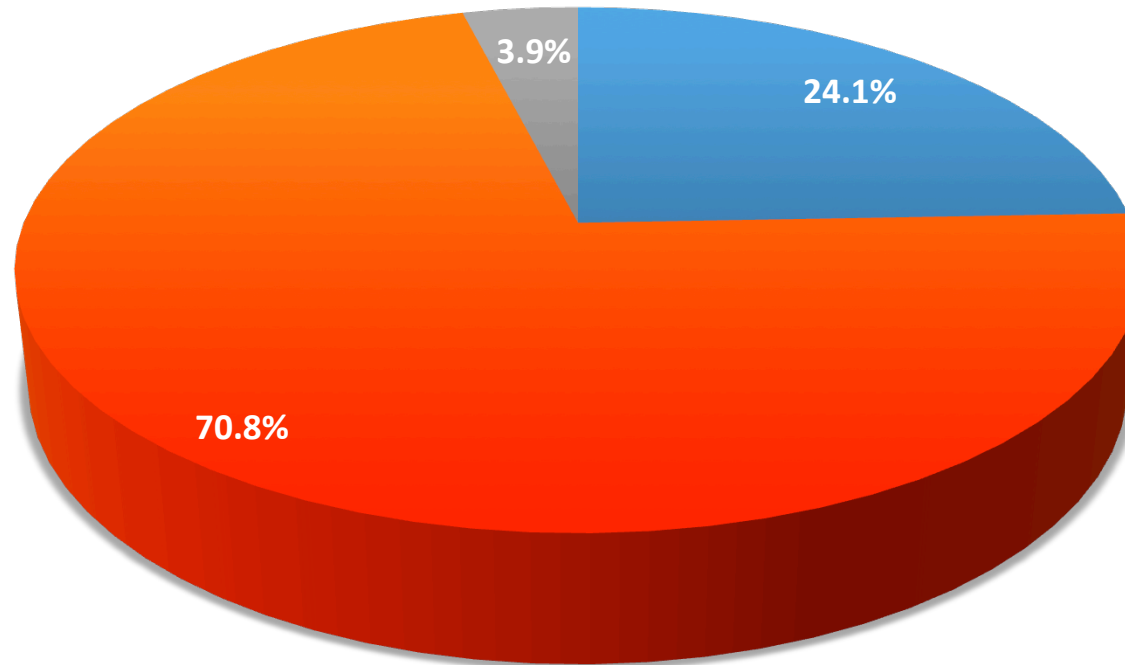
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Nearly One-Quarter of Respondents Indicated That They Have an AdBlocker Installed on a Device to Block Unwanted Ads

USE OF ADBLOCKERS ON DEVICES TO BLOCK ADS



■ Yes, use ad blocker ■ No, do not use ad blocker ■ Don't know

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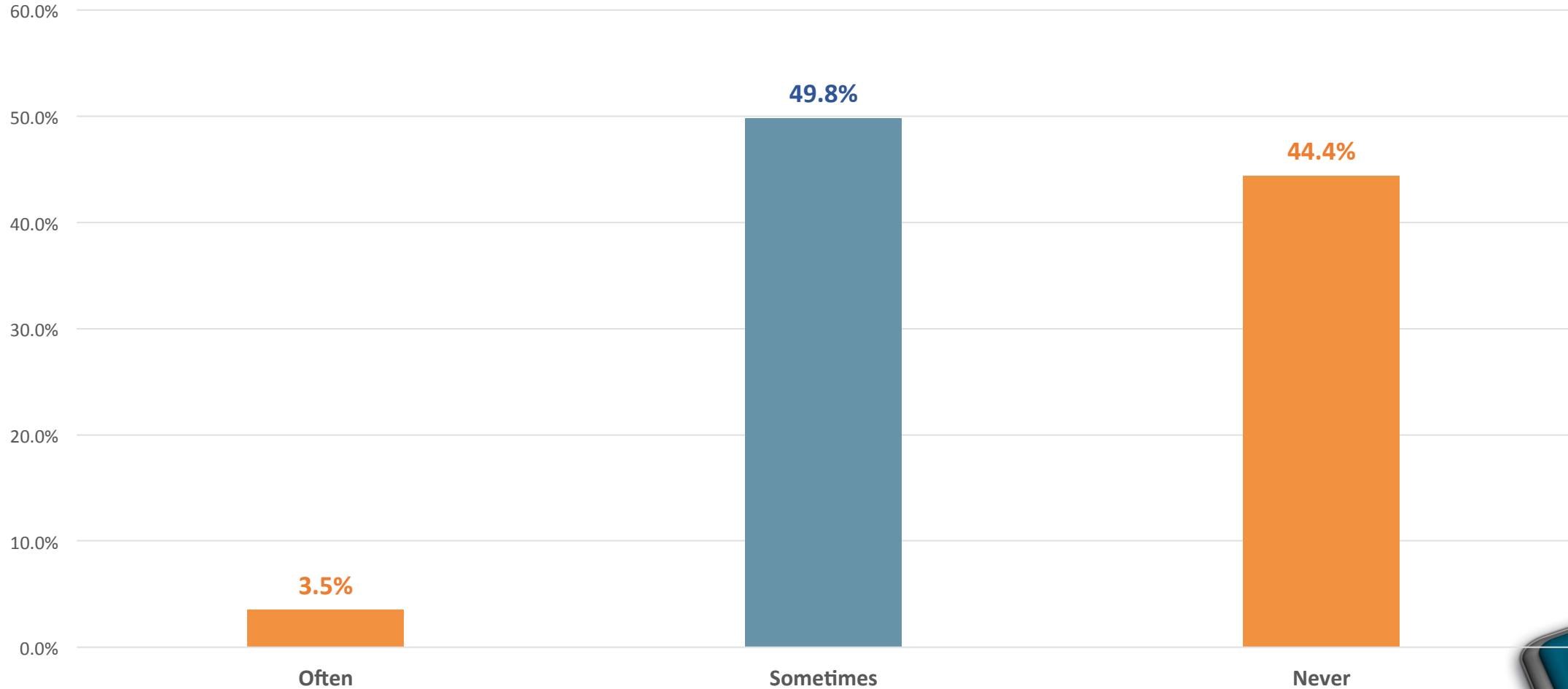
COMMUNITY NEWSPAPERS *RESULTS*



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More Than Half of People Admit to Clicking on Ads on Websites Accidentally

HOW OFTEN WOULD YOU SAY YOU CLICK ON ADS ON YOUR COMPUTER, TABLET OR PHONE ACCIDENTALLY?



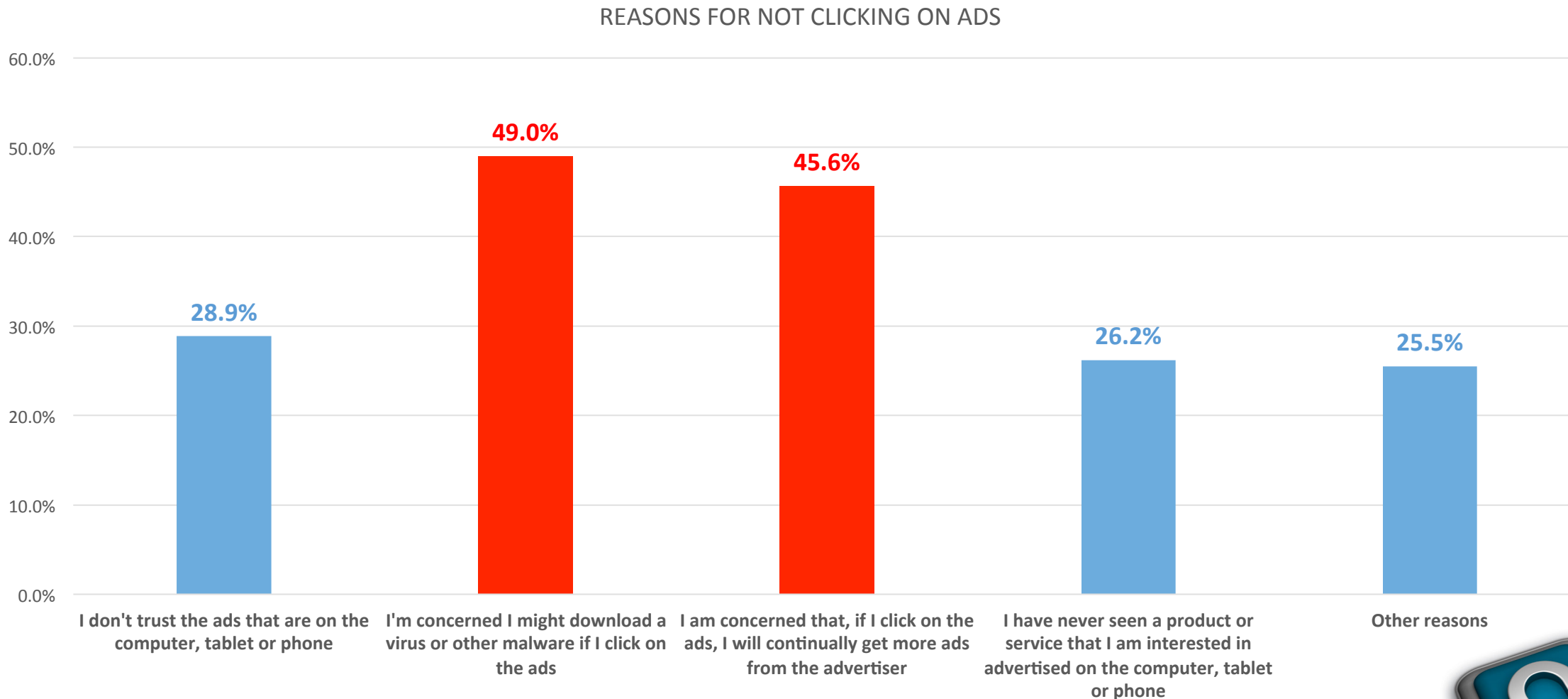
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The Main Reasons Given For Not Clicking on Ads Were Over Concerns About Downloading a Virus or Getting More Ads From the Advertiser



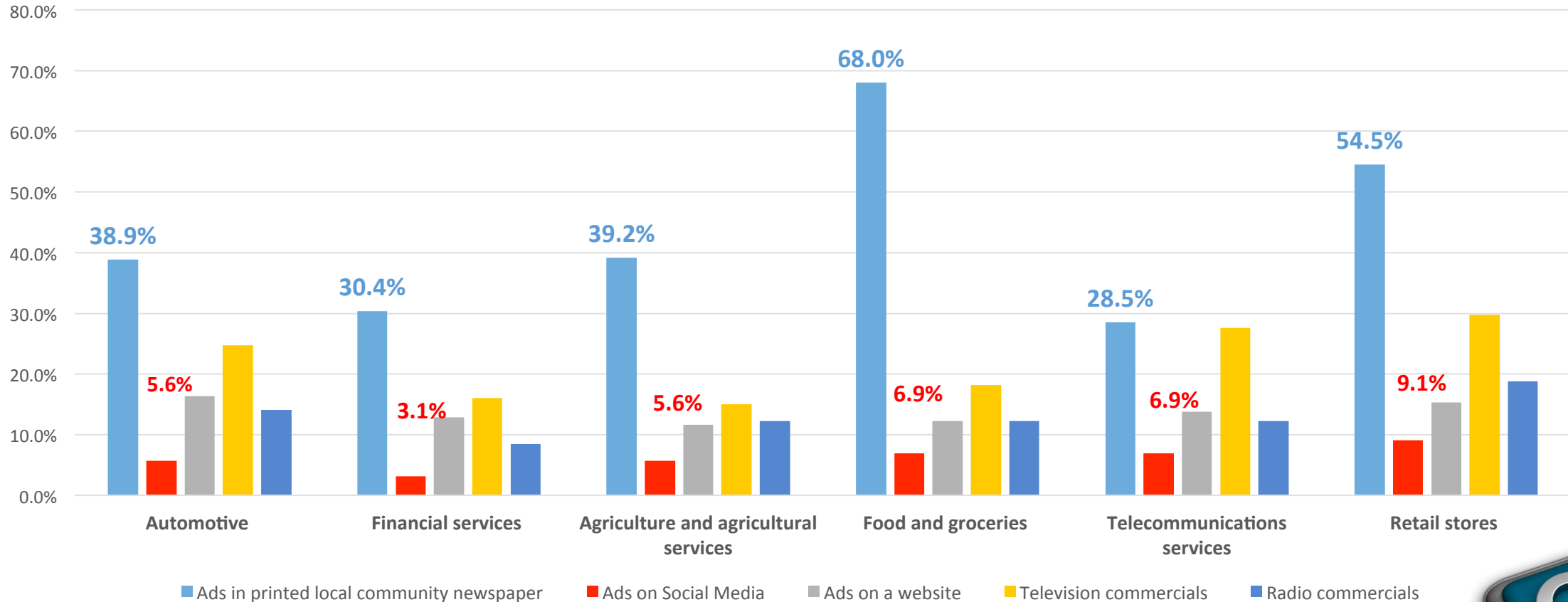
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Across All Sectors, Ads in Printed Local Community Newspapers Are **More Likely to Inspire Action** Than Other Mediums and **SIGNIFICANTLY** More Likely to Inspire Action Than Both Social Media and Other Website Ads

MEDIA CONTAINING ADS MOST LIKELY TO INSPIRE ACTION (In-Store Visit, Website Visit, Purchase Decision) BY SECTOR



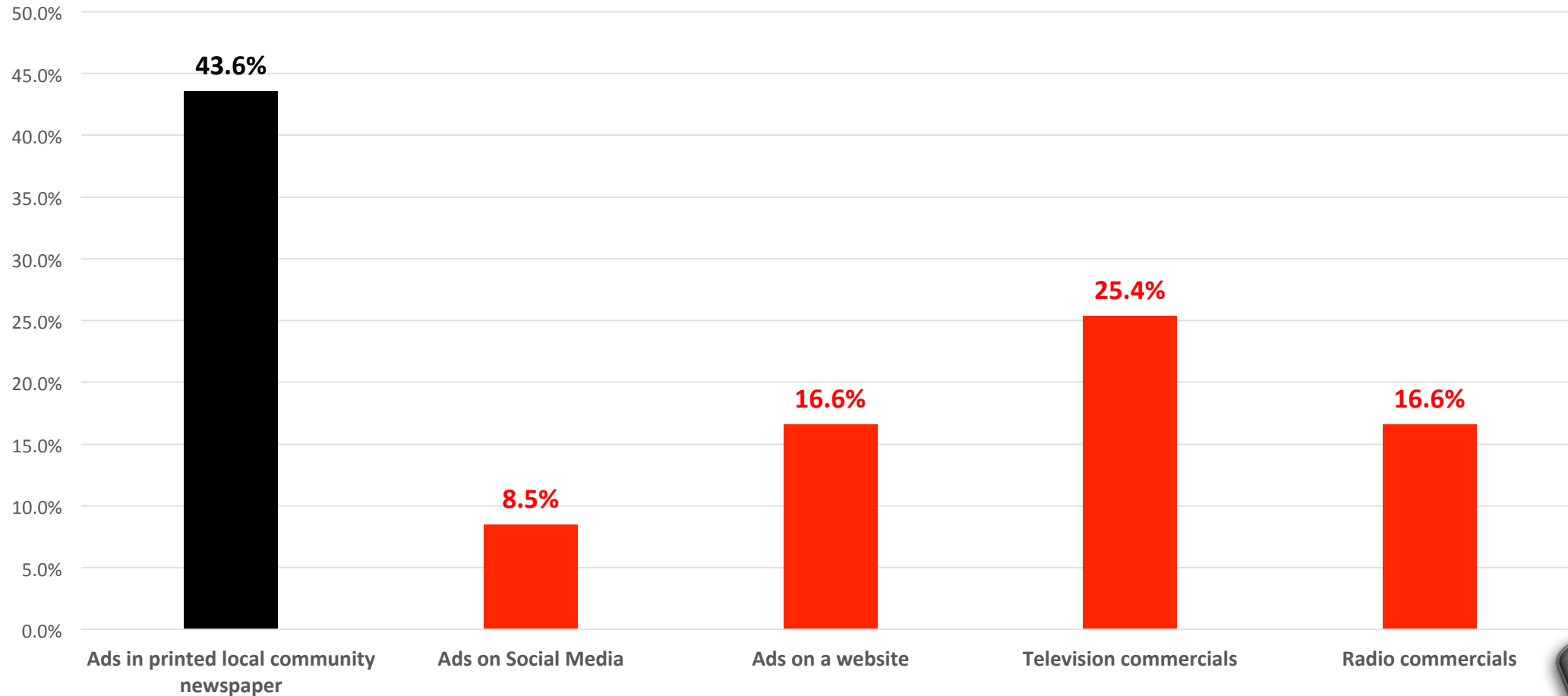
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COMMUNITY NEWSPAPERS RESULTS



Including GOVERNMENT PROGRAMS AND SERVICES

MEDIA CONTAINING ADS MOST LIKELY TO INSPIRE ACTION (In-Store Visit, Website Visit, Purchase Decision)
GOVERNMENT PROGRAMS AND SERVICES



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