

Totum Research Inc

How Geography Impacts Media Access, Usage and Engagement: January 2020

THE PRAIRIES

Measured Communities:

- 1) Farms
- 2) Farms/Hamlets: <1,000 Population
- 3) Villages/Towns: 1,000-10,000 Population
- 4) Cities: 10,000-100,000 Population
- 5) Overall: Communities <100,000 Population

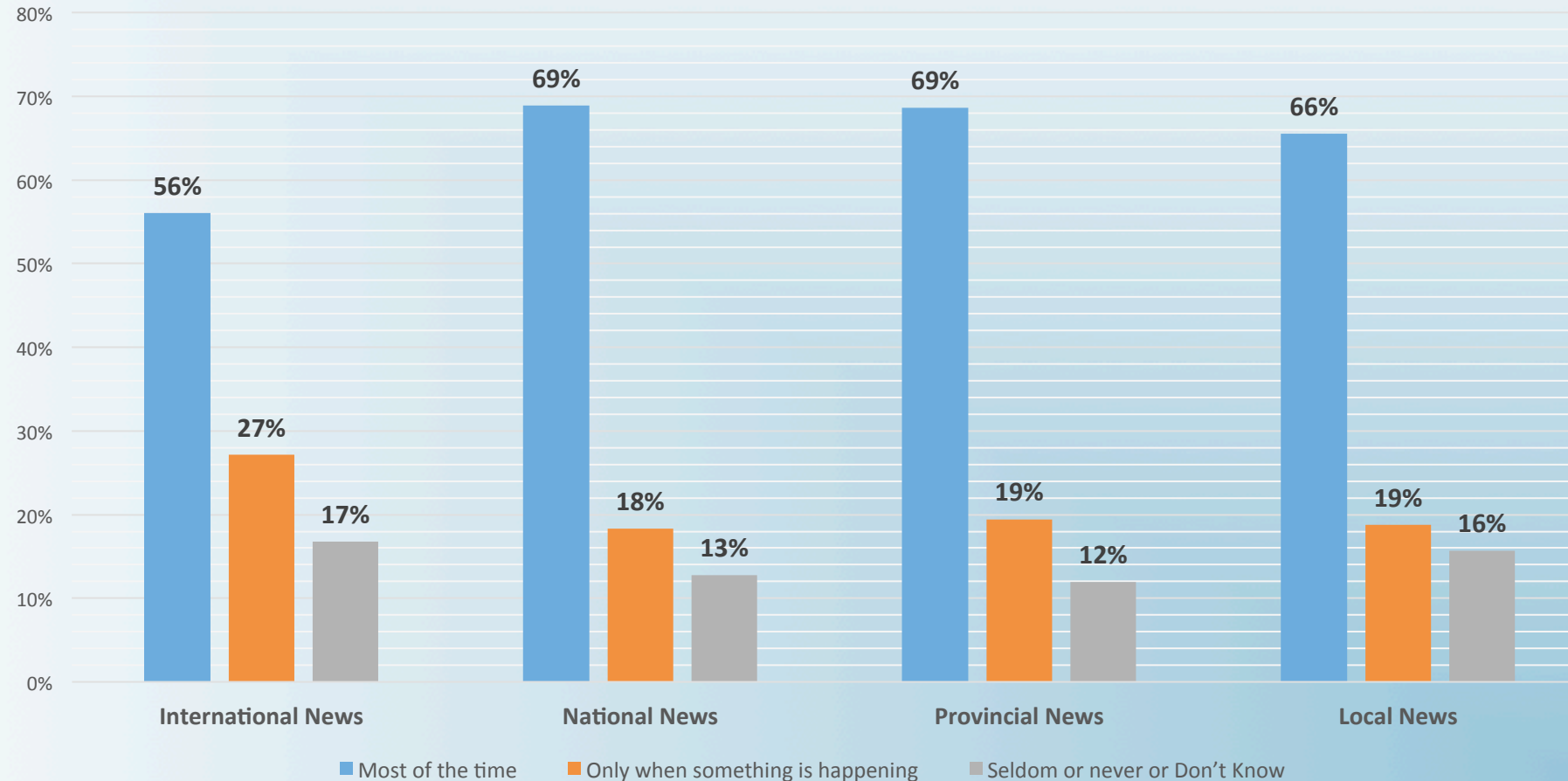
Totum Research: Random Sample Adults 18+ Using Computer Assisted Telephone Interview (CATI) Method with a margin of error of +/- 3.3% at 95% confidence level with 900 interviews



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People Continue to Follow All Types of News

Overview: Types of News Followed



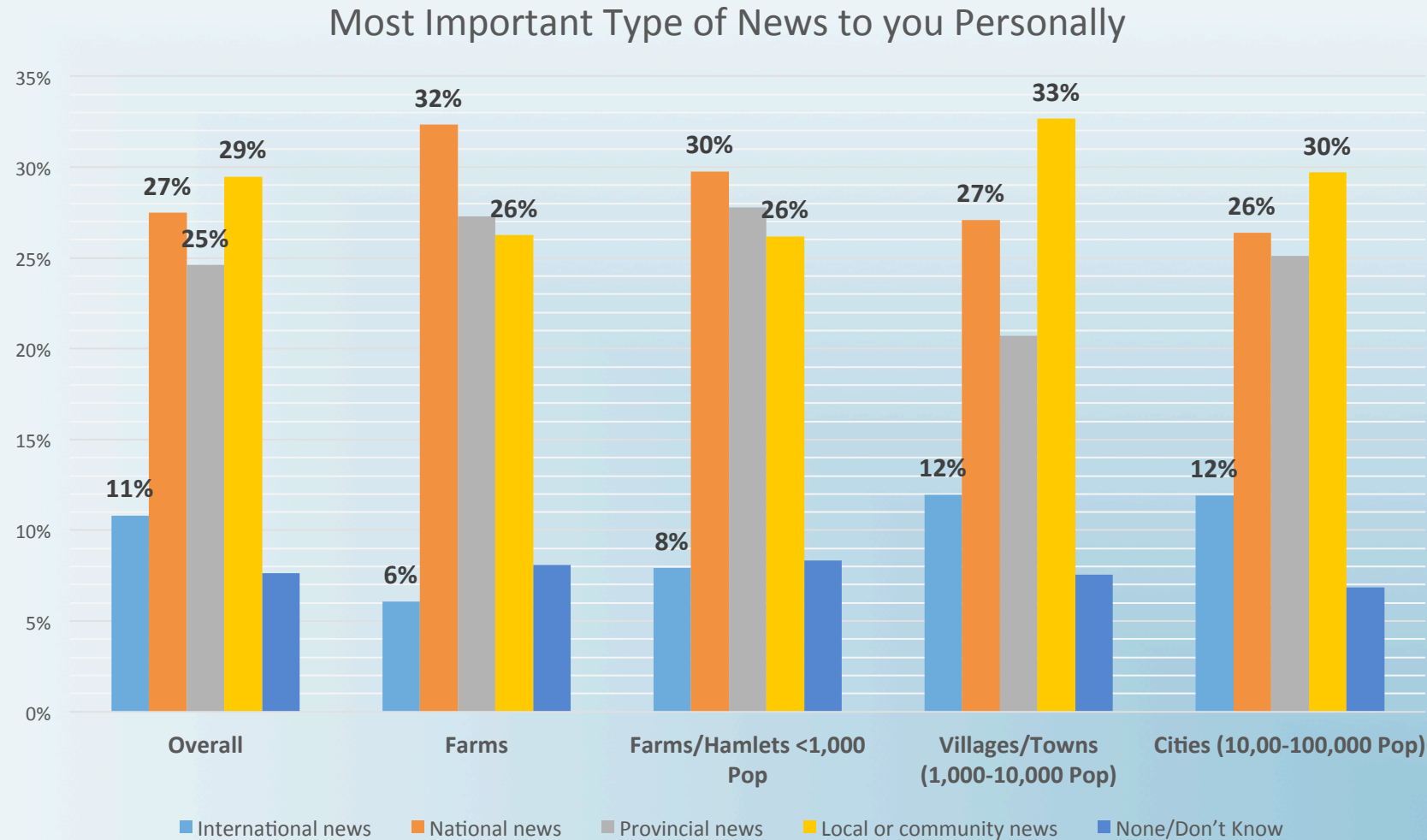
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National News Tends to be Favoured in Smaller Communities, Local News Most Important in Larger Communities



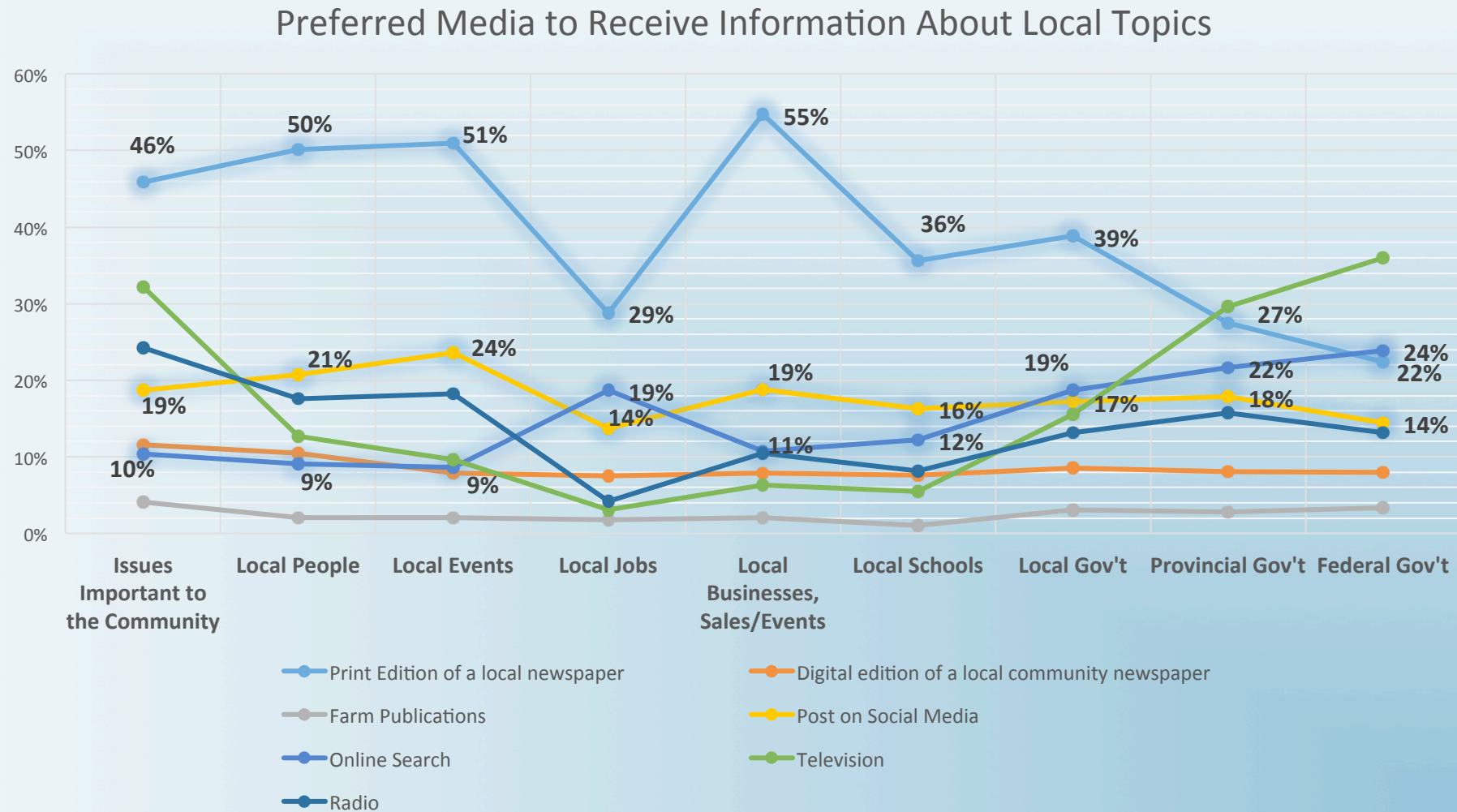
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Printed Community Newspapers the Preferred Platform to Receive Information on Most Topics of Interest



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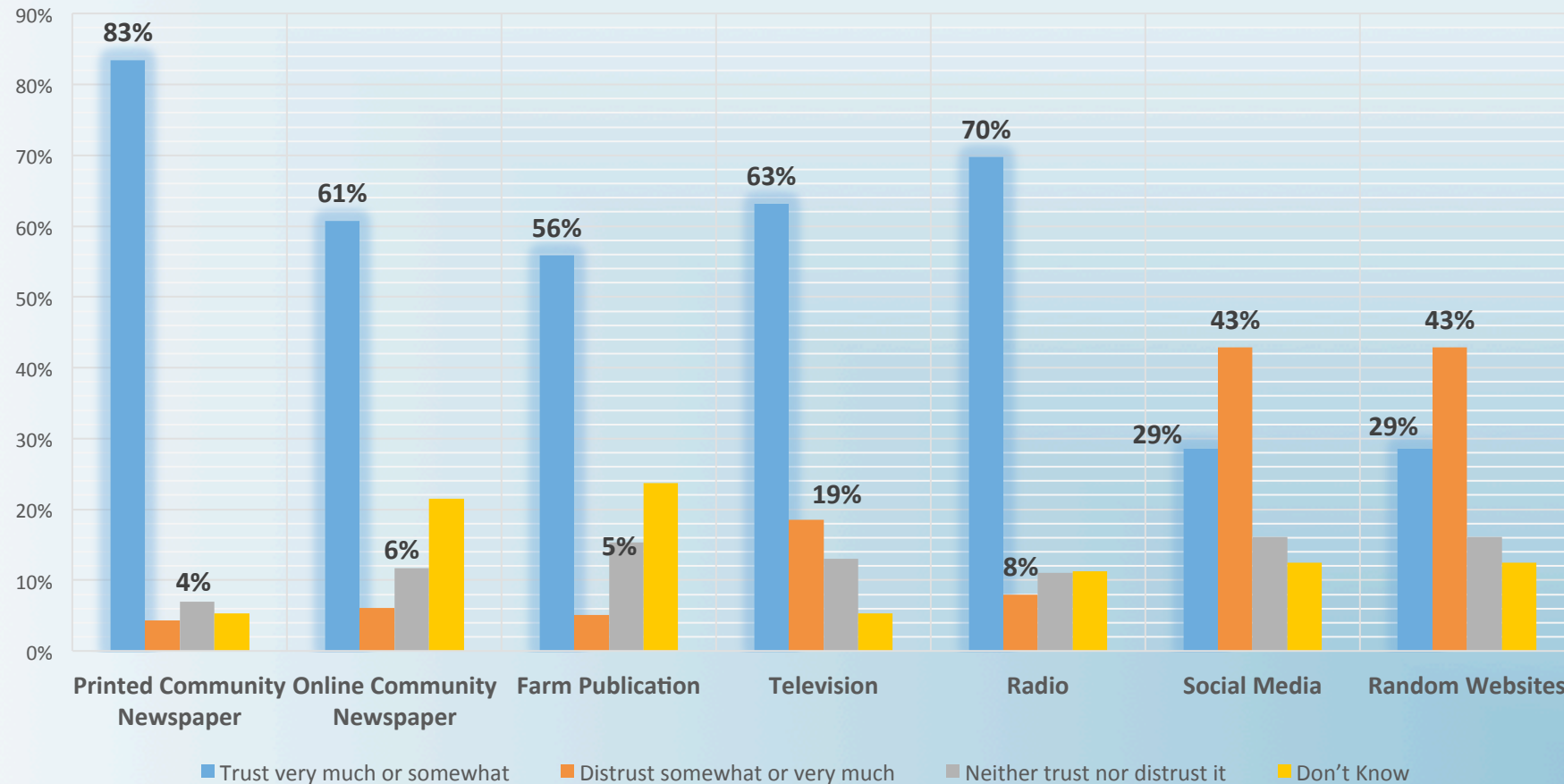
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Printed Community Newspapers Are The Most Trusted Platform for News/Ad Content, Online/Social Media, The Least Trusted

Trust in News and Advertising Content by Platform



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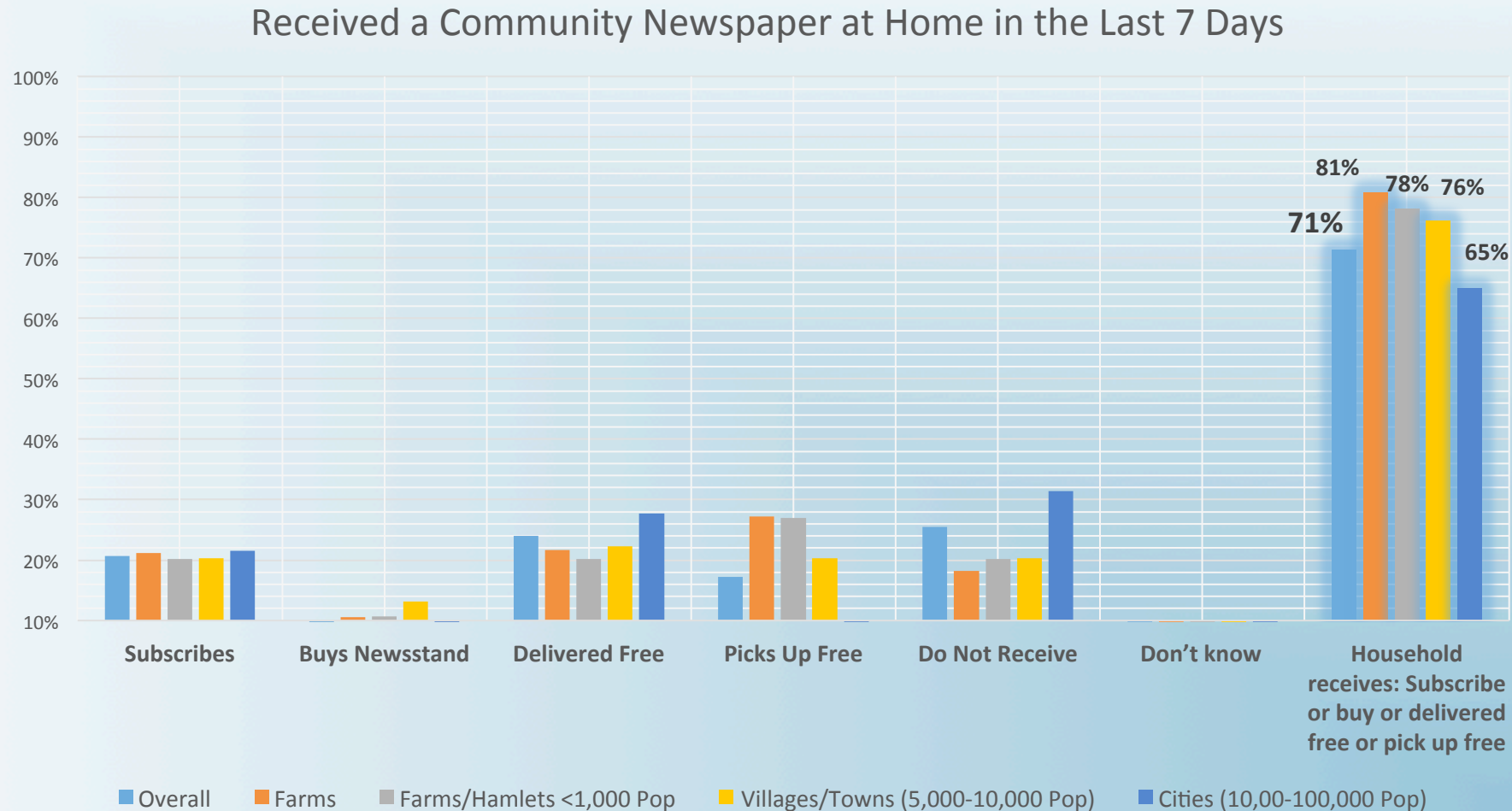
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Prairies: Communities Under 100,000 Population

71% of Households in Communities Under 100,000 Population Report Receiving a Printed Community Newspaper Each Week



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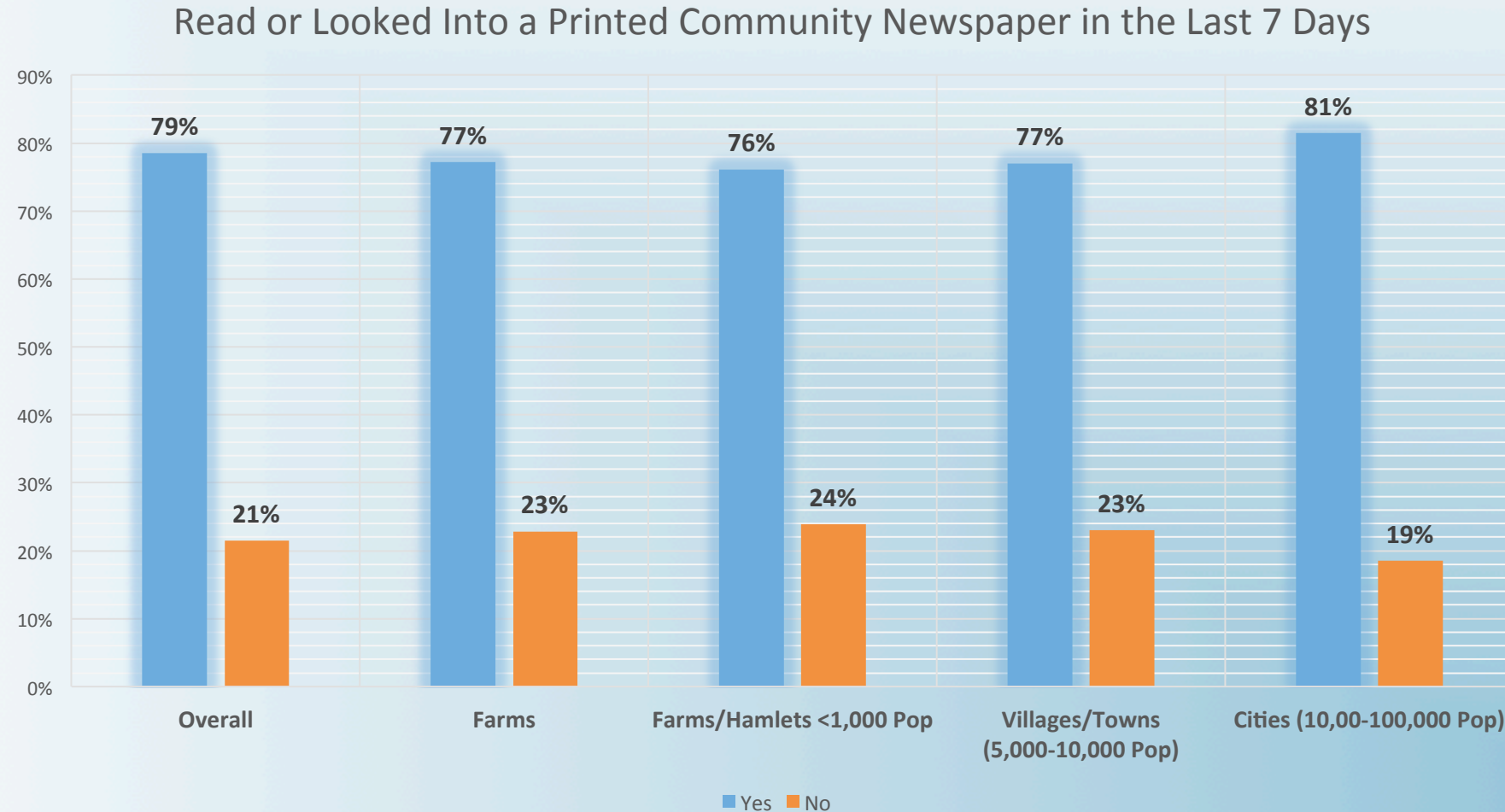
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Prairies: *Communities Under 100,000 Population*

Nearly 80% of Respondents in Households in Communities Under 100,000 That Receive a Printed Community Newspaper, Reported Having Read or Looked Into it in the Last Week



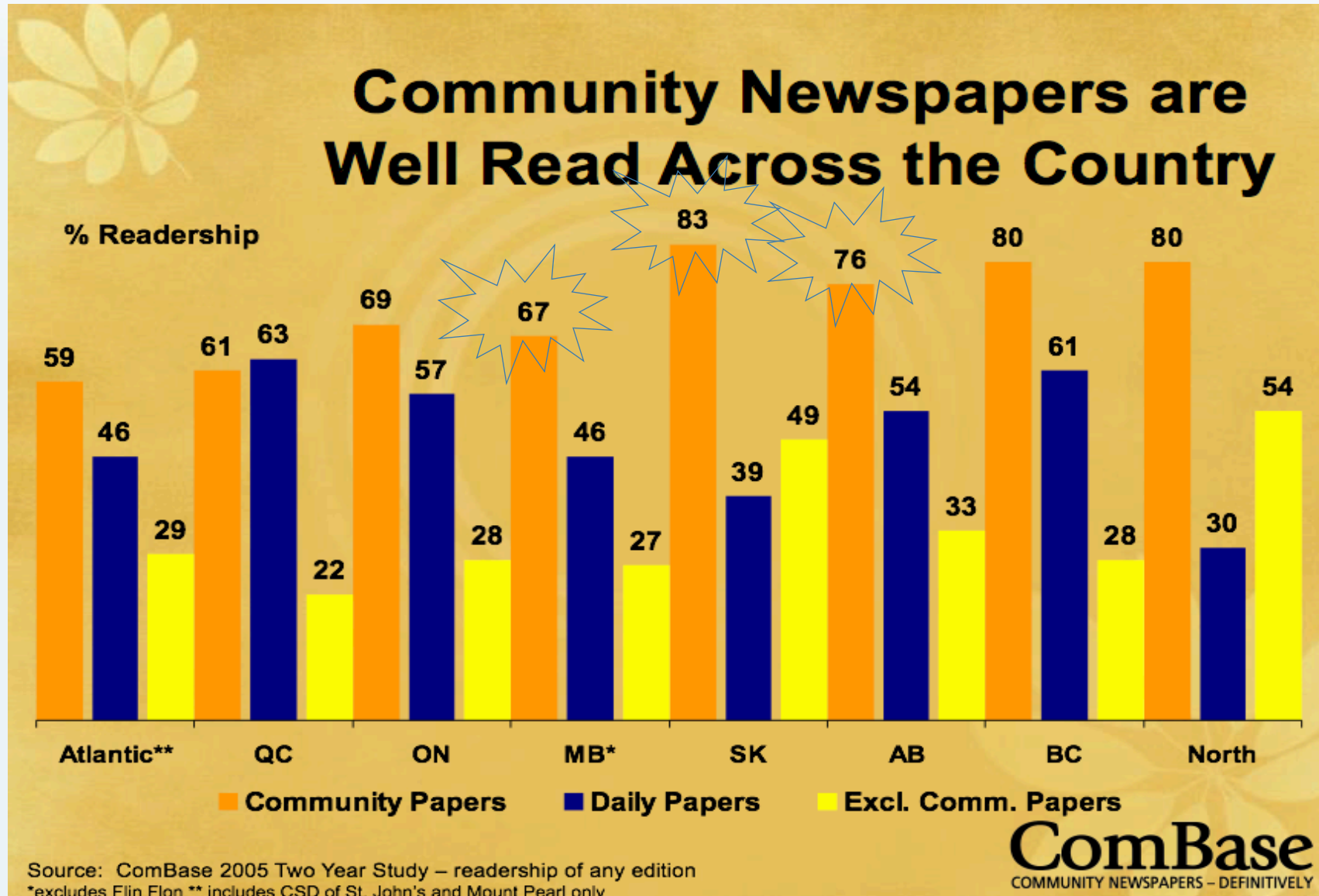
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Community Newspaper Readership c2005



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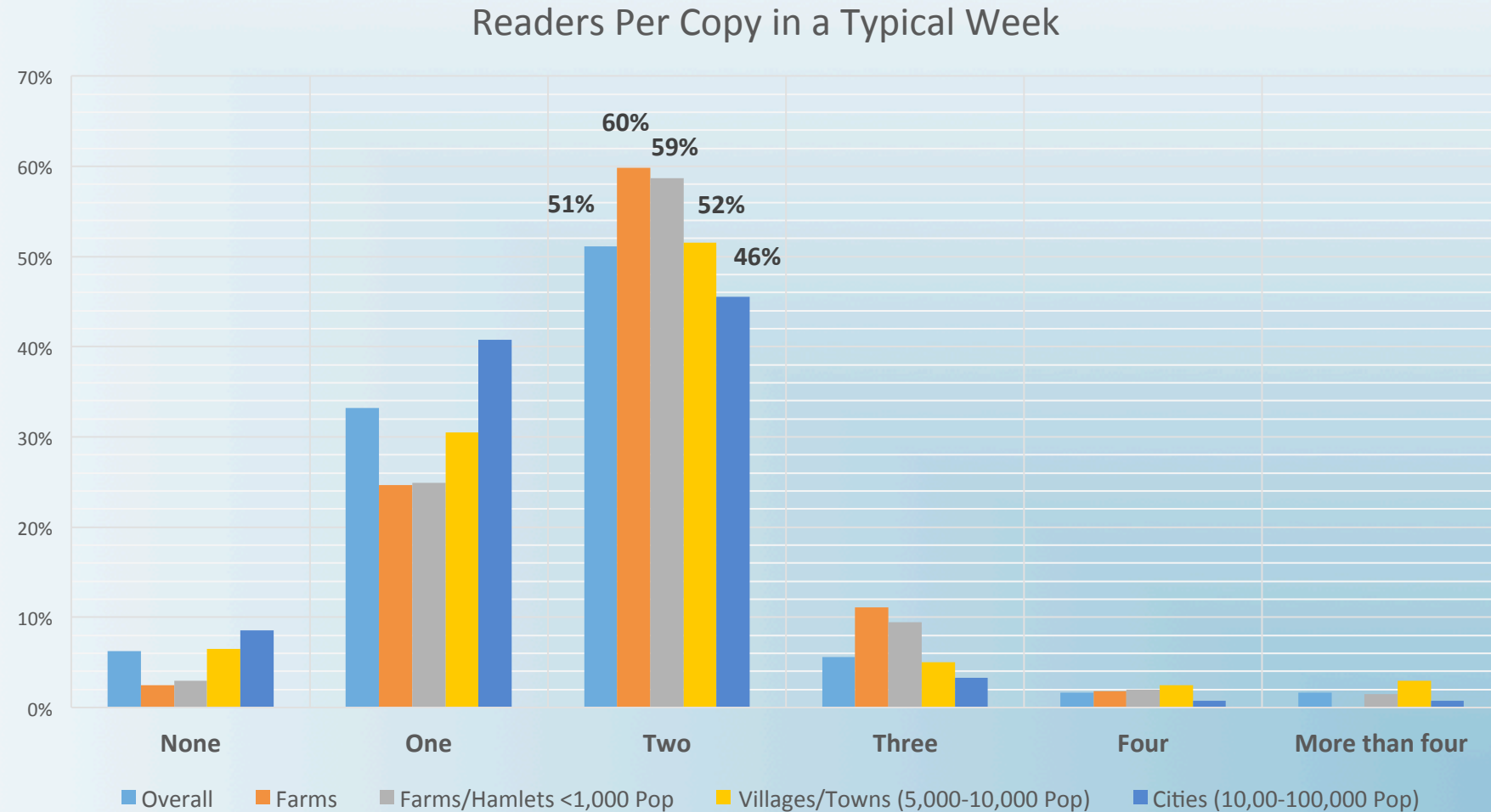
Totum Research: Interview timing Dec. 2019/Jan. 2020. Random Sample Adults 18+ Using Computer Assisted Telephone Interview (CATI) Method with a margin of error of +/- 4.4% at 95% confidence level with 500 interviews.



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Prairies: *Communities Under 100,000 Population*

Overall 51% of Respondents Indicated That There Were 2 Readers Per Household of a Printed Community Newspaper Each Week. More Readers Per Copy in Farm Households.



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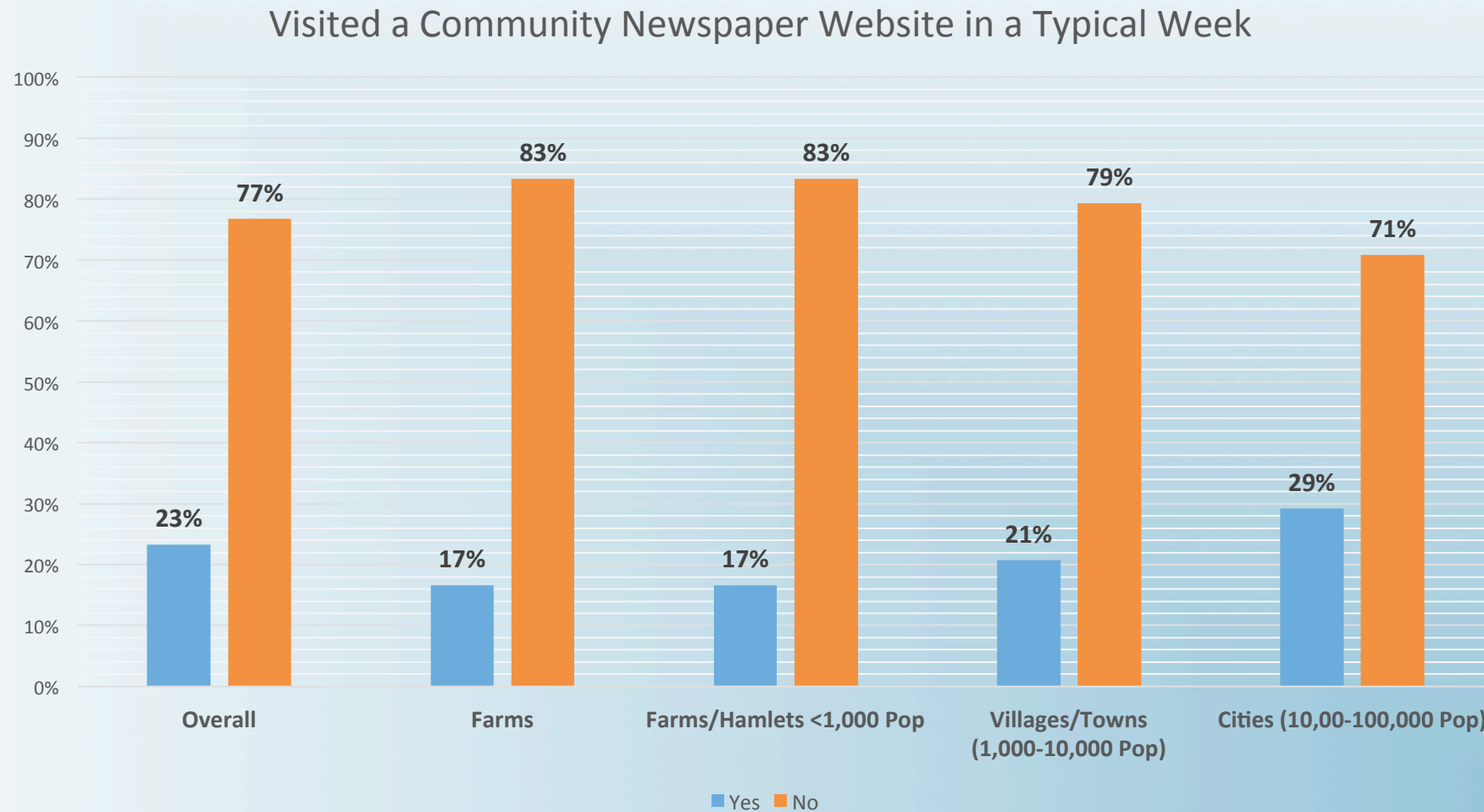
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Prairies: Communities Under 100,000 Population

Over Three Quarters of Respondents Indicated They HAVE NOT Visited the Website of a Local Community Newspaper in the Last 7 Days



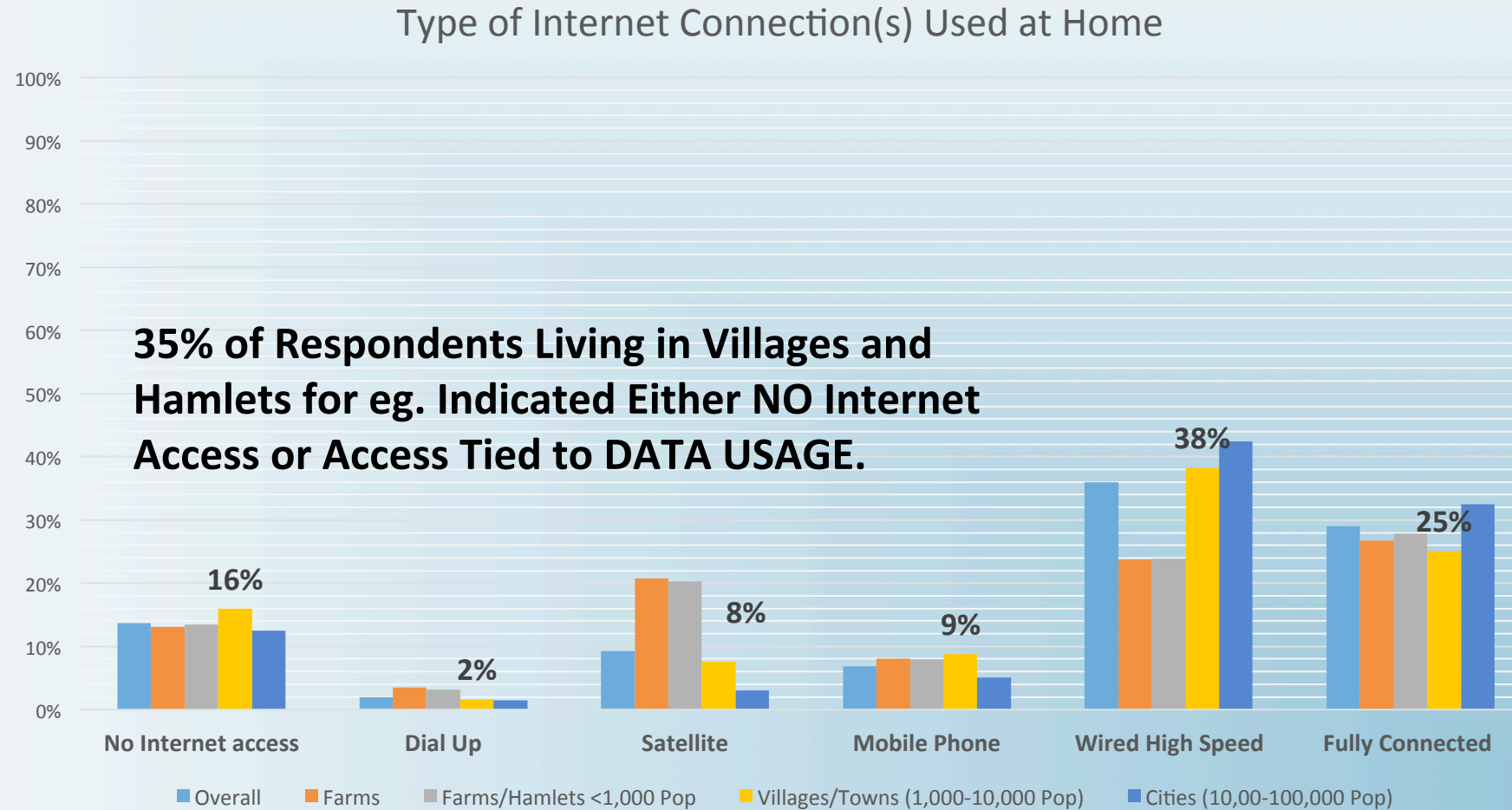
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Respondents Access the Internet in a Variety of Ways in Rural and Remote Communities



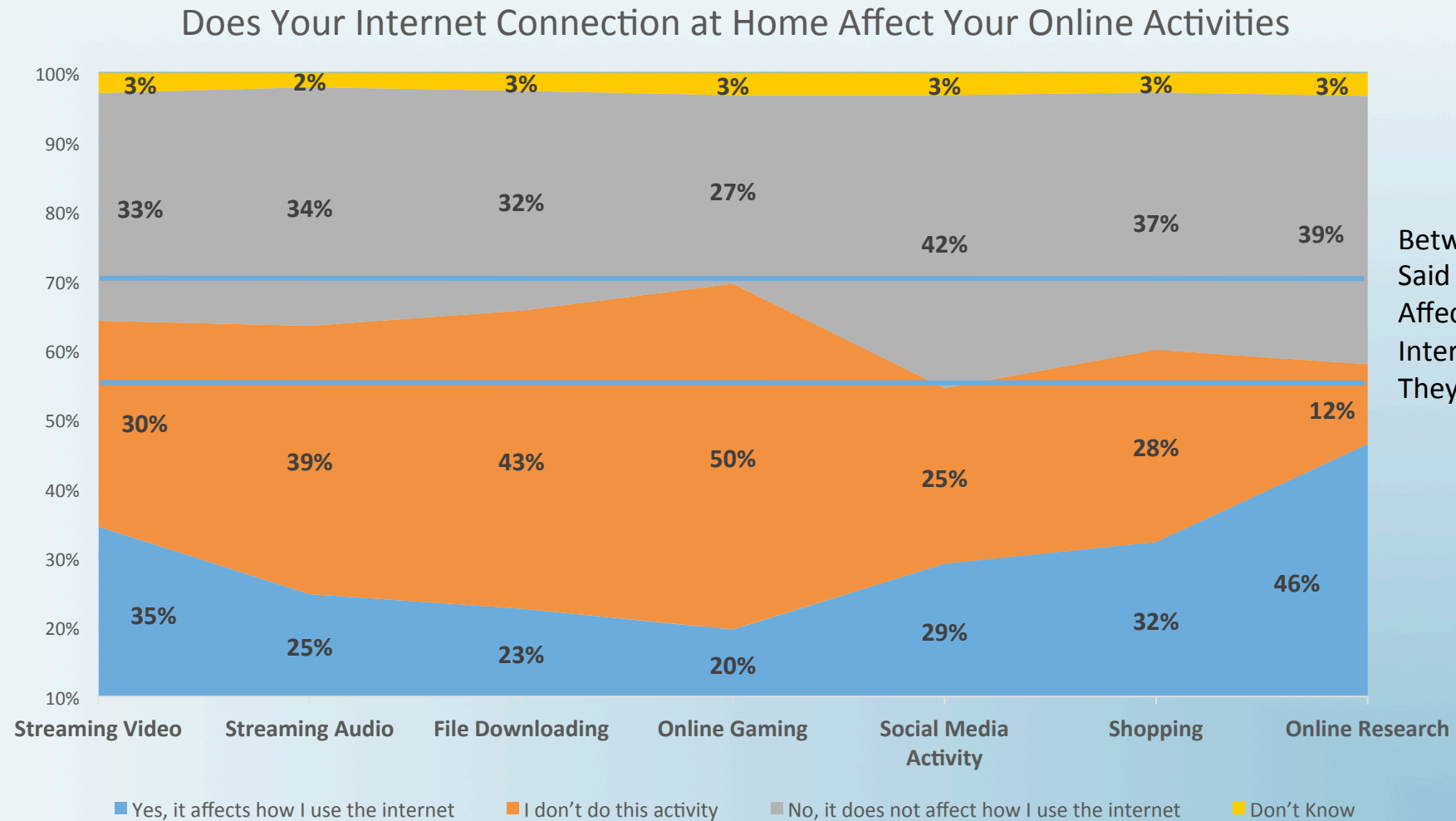
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20%-46% of Respondents Confirmed That Their Internet Access/Service Impacts Their Ability to do Certain Activities Online



Between 54% and 70% Said the Activity Was Affected by Their Internet Connection or They Didn't Do It

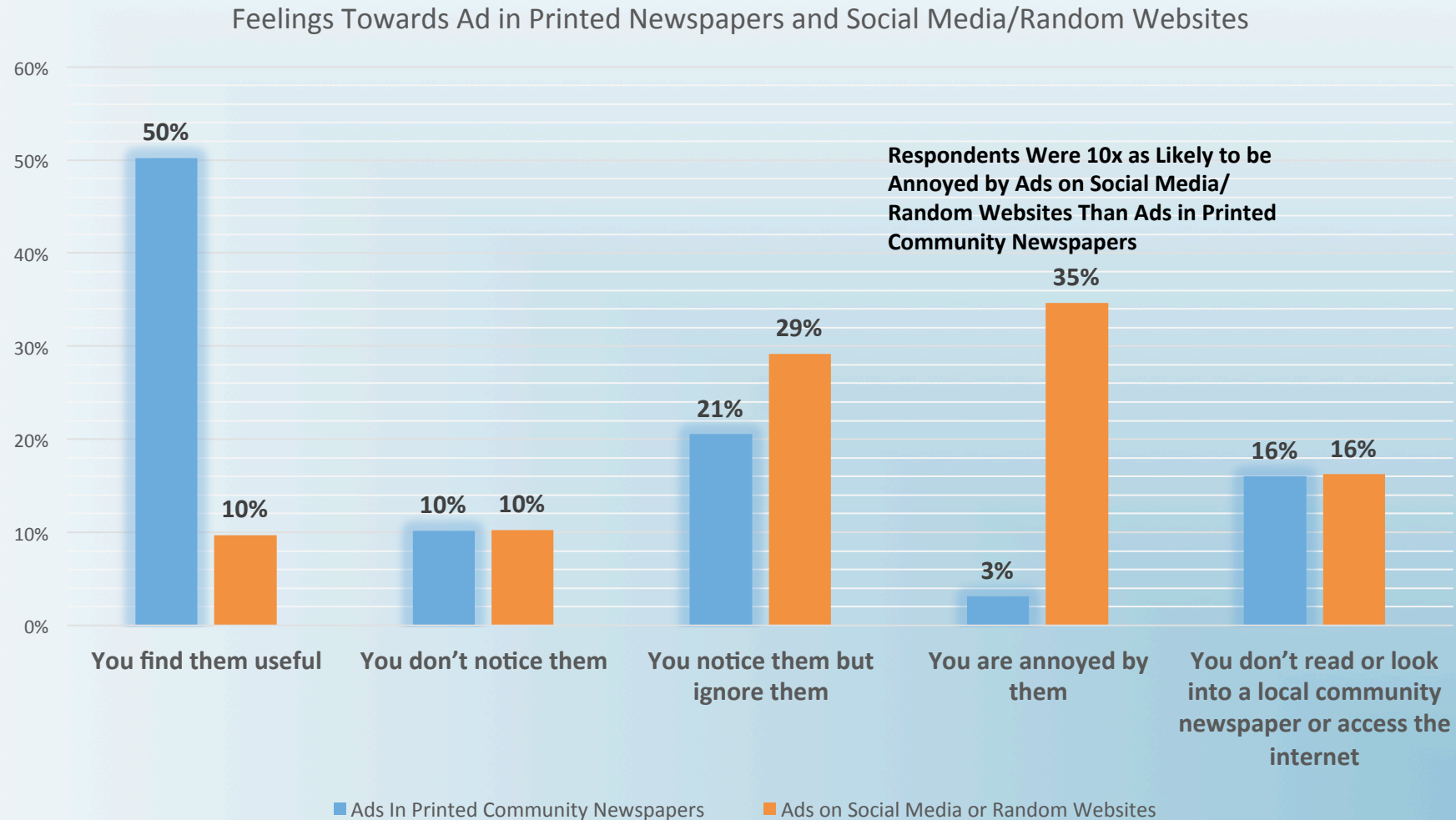
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Respondents Indicated They Found Ads in Printed Community Newspapers 5 Times More Useful Than Ads in Social Media/Online



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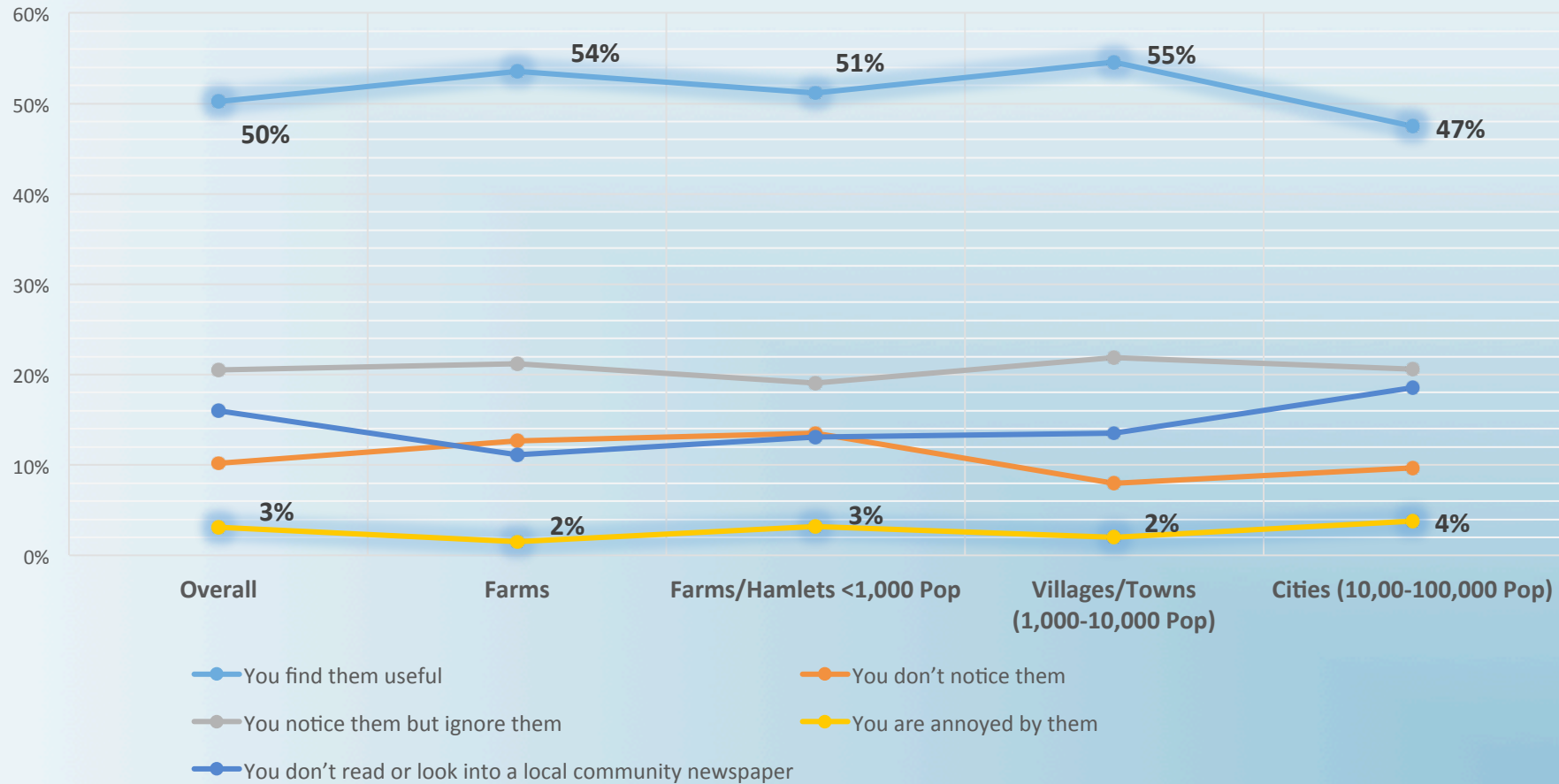


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Prairies: Communities Under 100,000 Population

Overall, 50% of Respondents Indicated Community Newspaper Ads Were Useful With Very Few Saying They Were Annoying

Feel About Ads in Printed Community Newspapers



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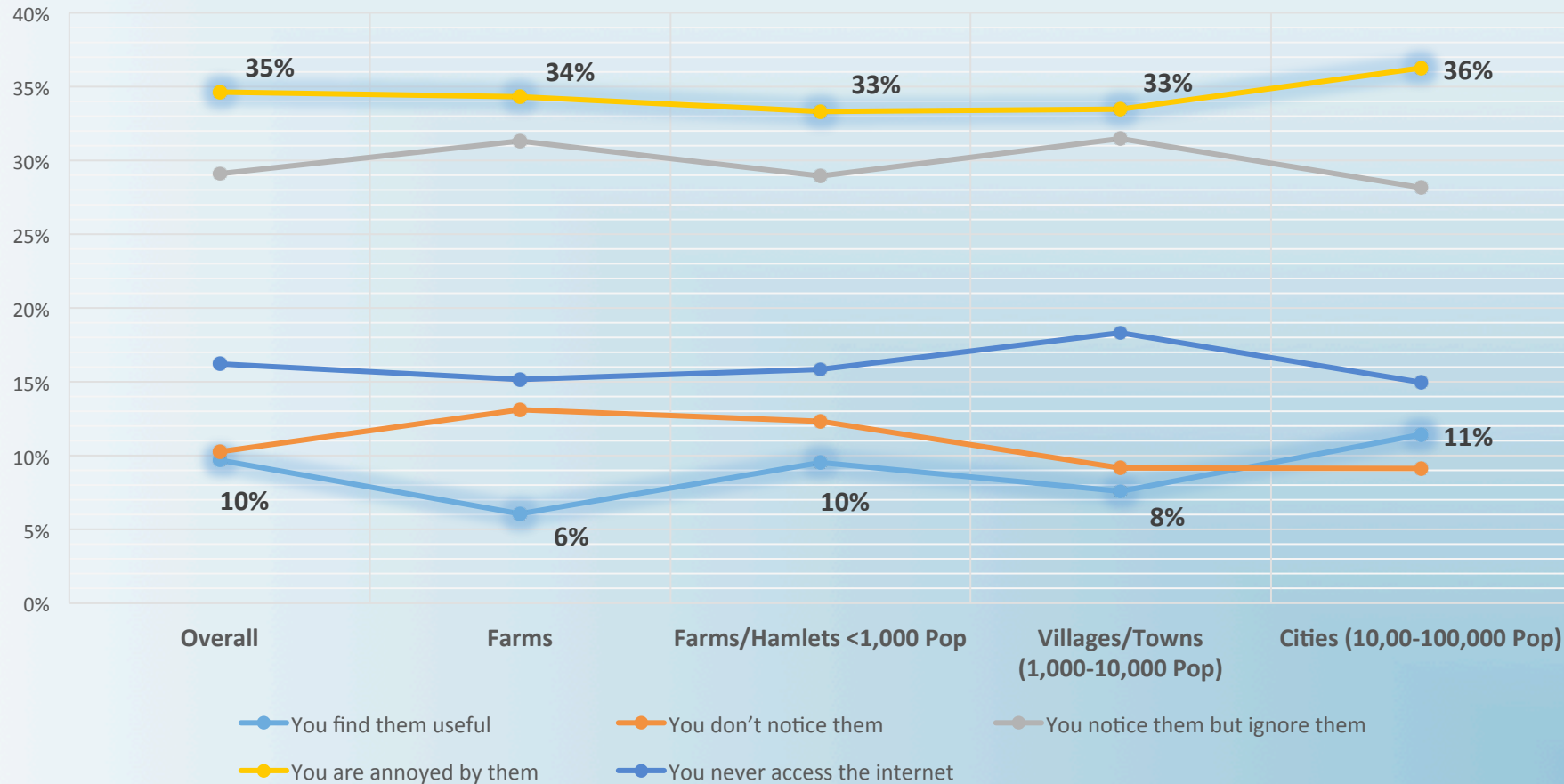


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Prairies: Communities Under 100,000 Population

Social Media/Online Ads Were Found to be 'Annoying' by One Third or More Respondents in All Community Size Categories. One in Ten of ALL RESPONDENTS Found Them to be Useful

Feel About Ads on Social Media/Random Websites



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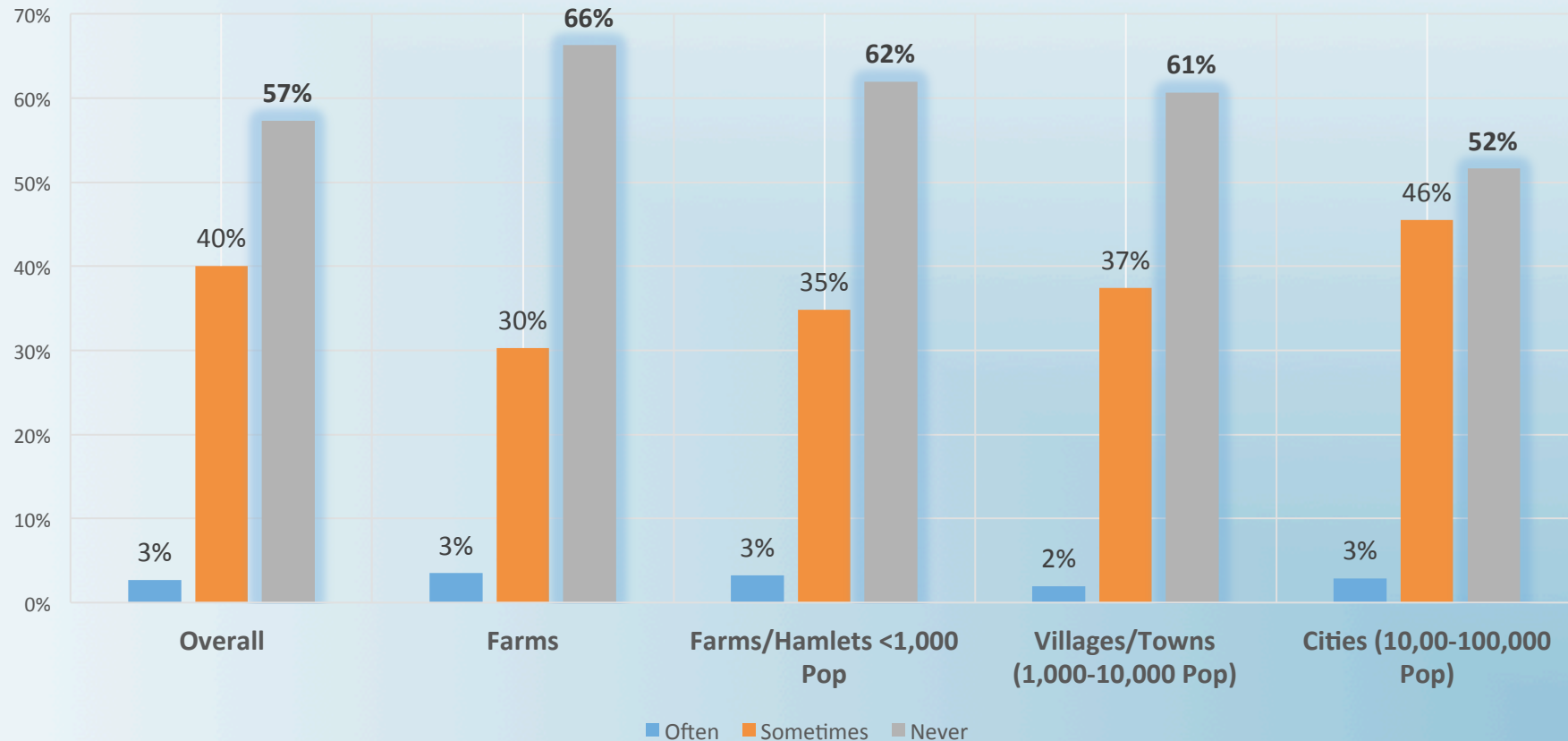
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The Majority of Respondents in All Community Size Categories Indicated That They Never INTENTIONALLY Click on Social Media or Ads on Random Websites

How Often Would You Intentionally Click on an Ad on Social Media or a Random Website



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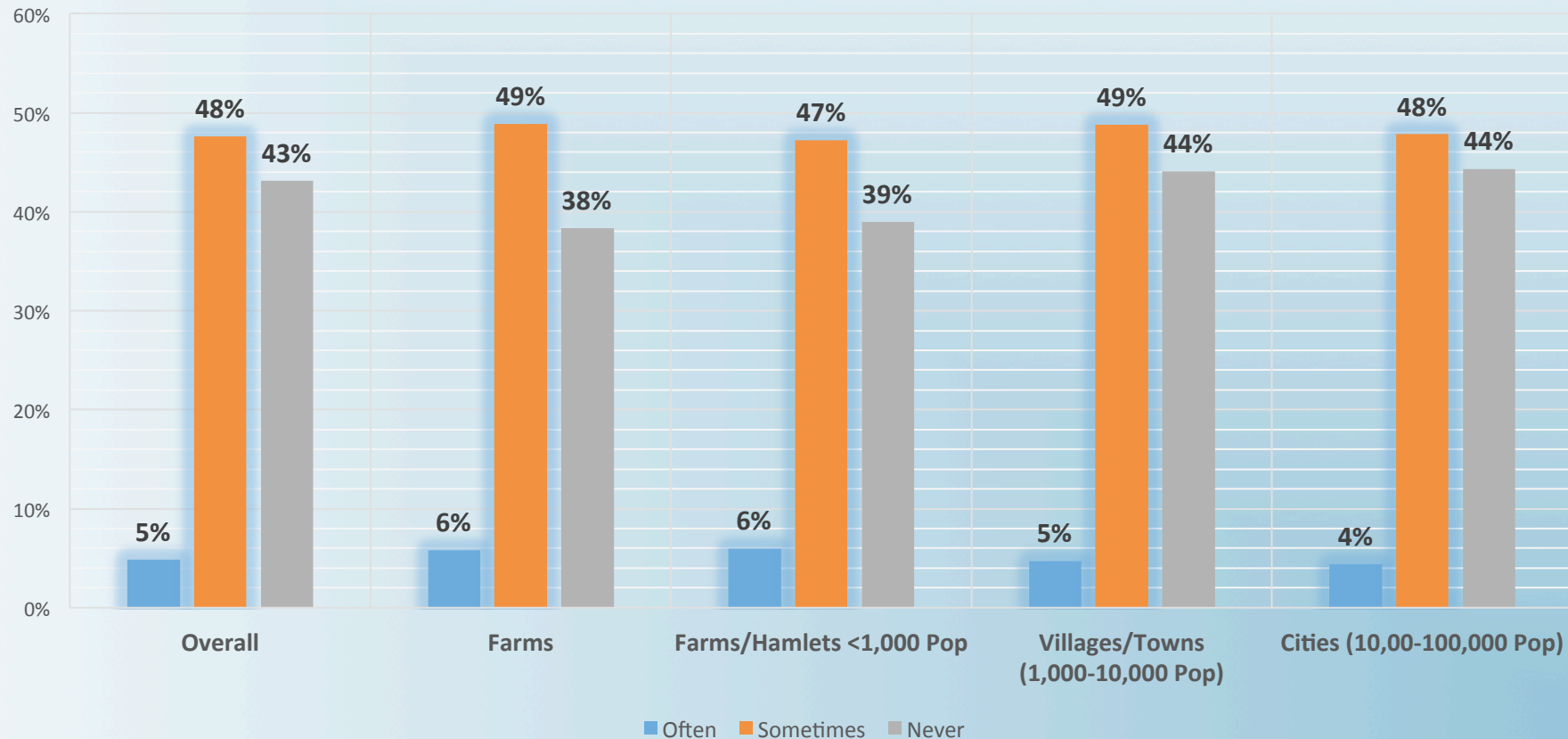
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Over Half of All Respondents Did Admit That They ‘Often’ or ‘Sometimes’ UNINTENTIONALLY Click on Ads on Social Media or Random Websites

How Often Would You Unintentionally Click on an Ad on Social Media or a Random Website



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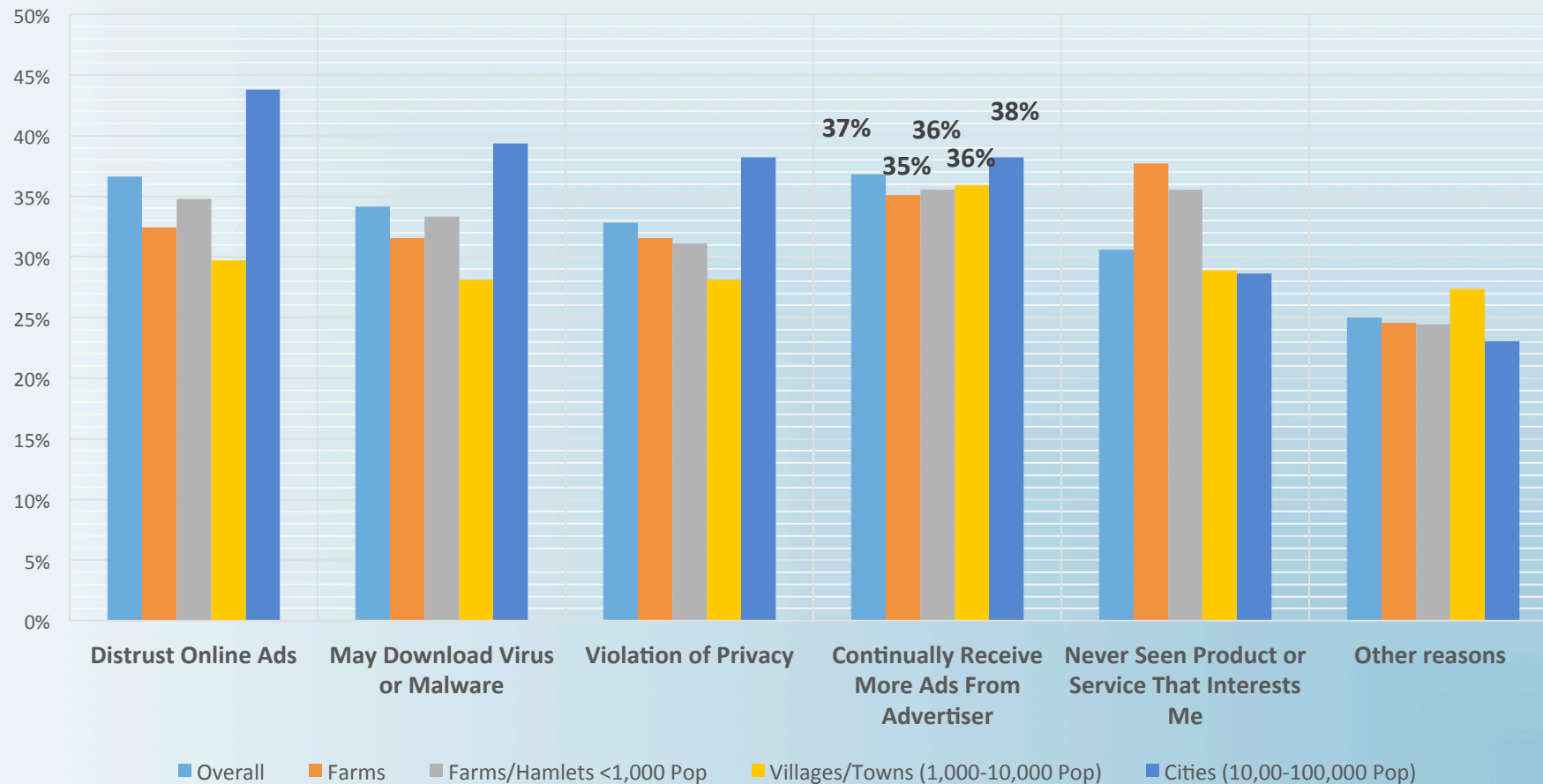
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While Reasons For Not Clicking on Ads Varies, Continually Receiving More Ads From the Advertiser Was Cited by More Than One-Third of Respondents as the Major Reason Across All Community Size Categories

Reasons for Not Clicking on Ads on Social Media or Random Websites



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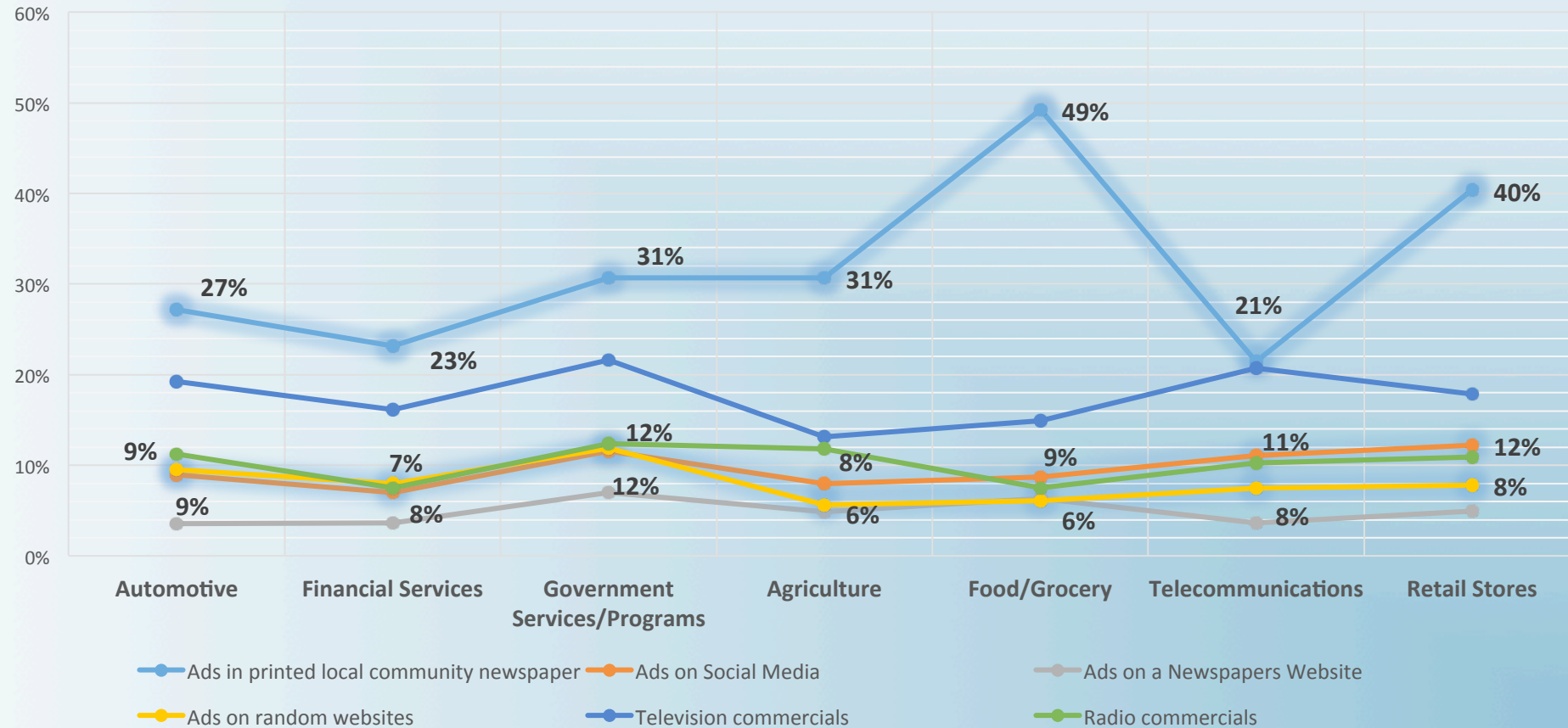


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Prairies: Communities Under 100,000 Population

Across All Measured Sectors, Ads in Printed Community Newspapers Were Most Likely to Inspire Action, Ads On Social Media, Random Websites AND Community Newspaper Sites WERE LEAST LIKELY to Inspire Action

Media in Which Ads Inspire Action (Seek More Information, Store/Website Visit or Purchase)



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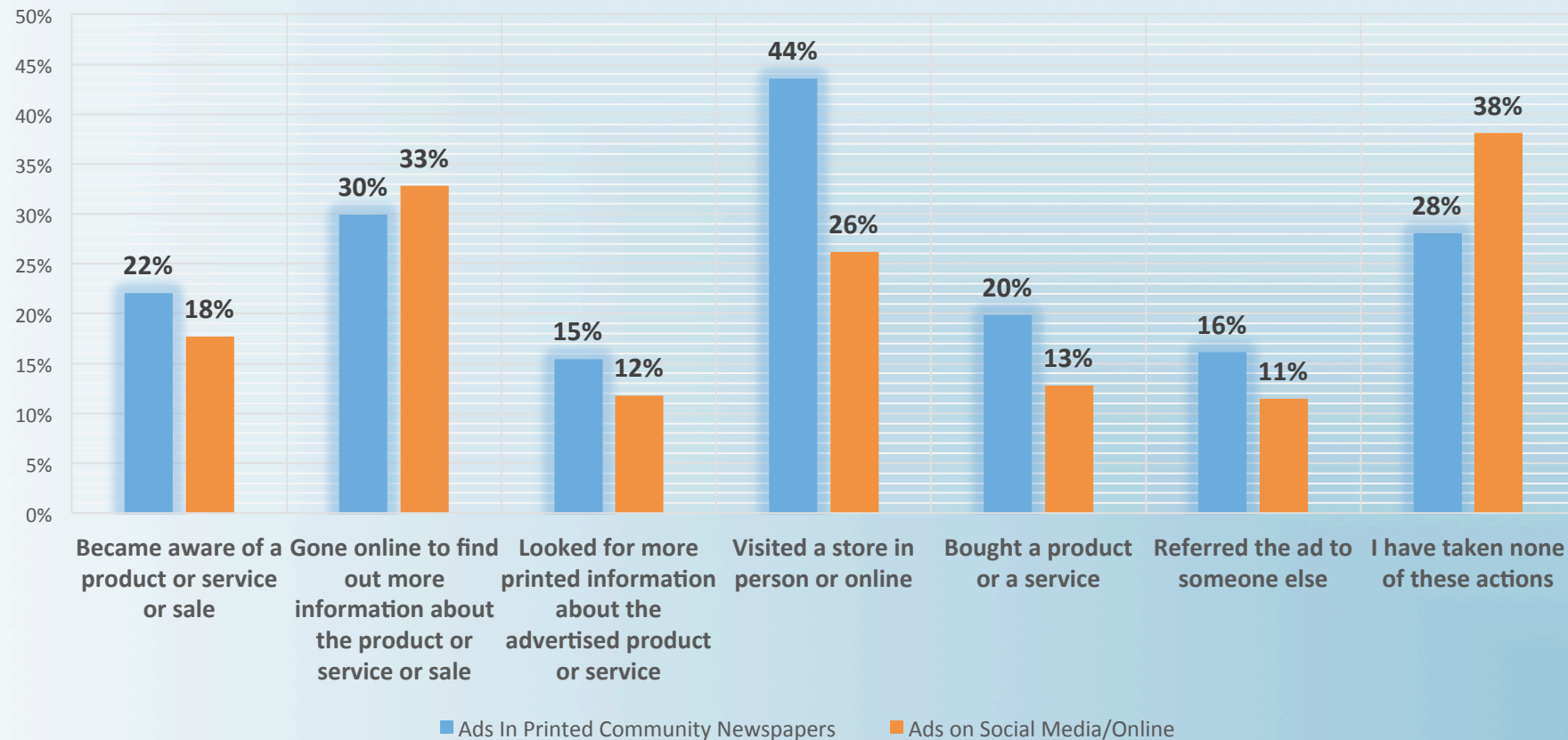


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Prairies: Communities Under 100,000 Population

Respondents Indicated That Ads In Printed Community Newspapers Are More Likely to Generate an In-Person Store or Online Store Visit Than Ads on Social Media or Online

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



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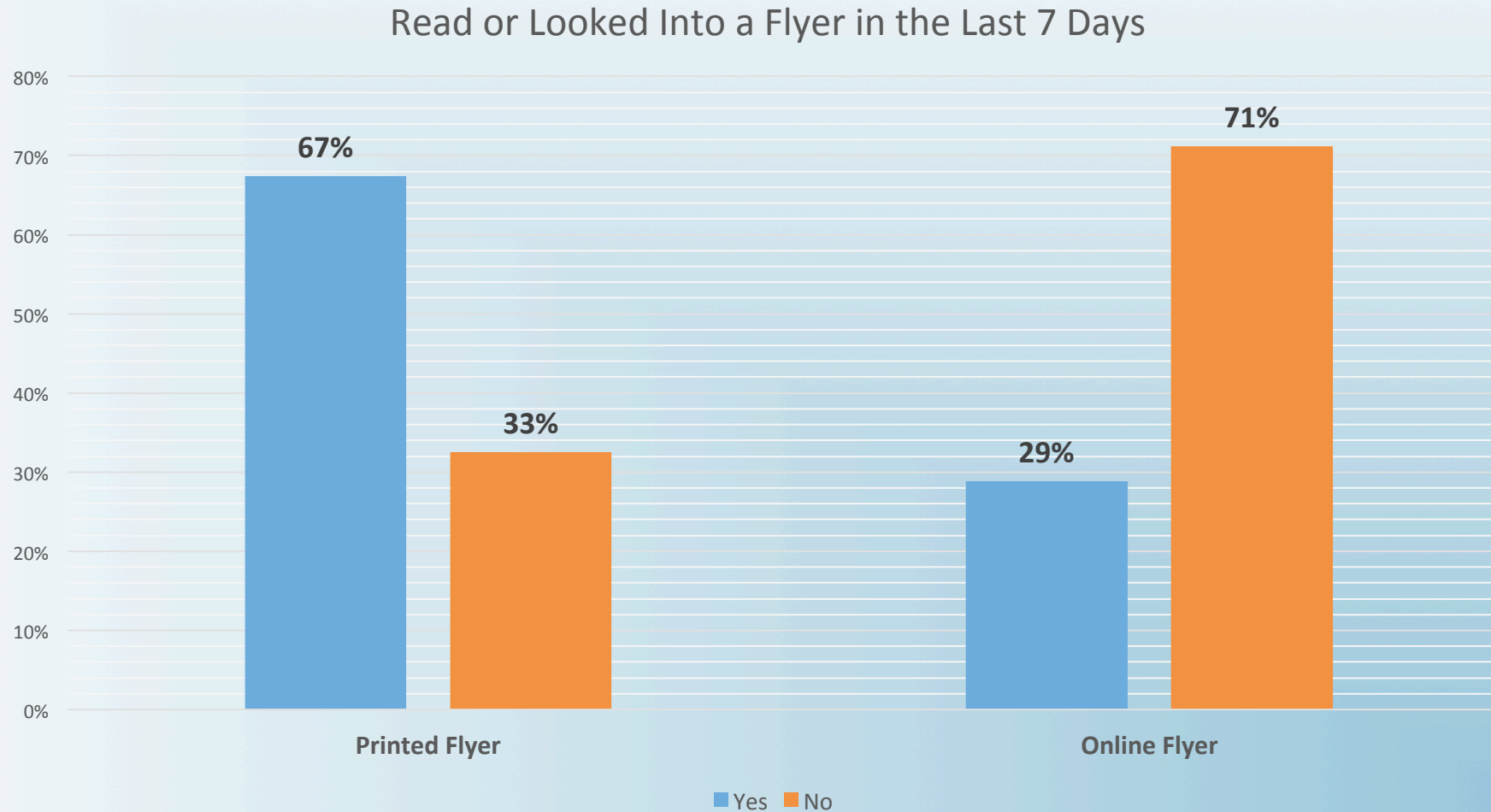
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Prairies: *Communities Under 100,000 Population*

Nearly 70% of Respondents Indicated Having Looked Into a Printed Flyer in the Last 7 Days. 30% Said They'd Looked At an Online Flyer in the Past Week



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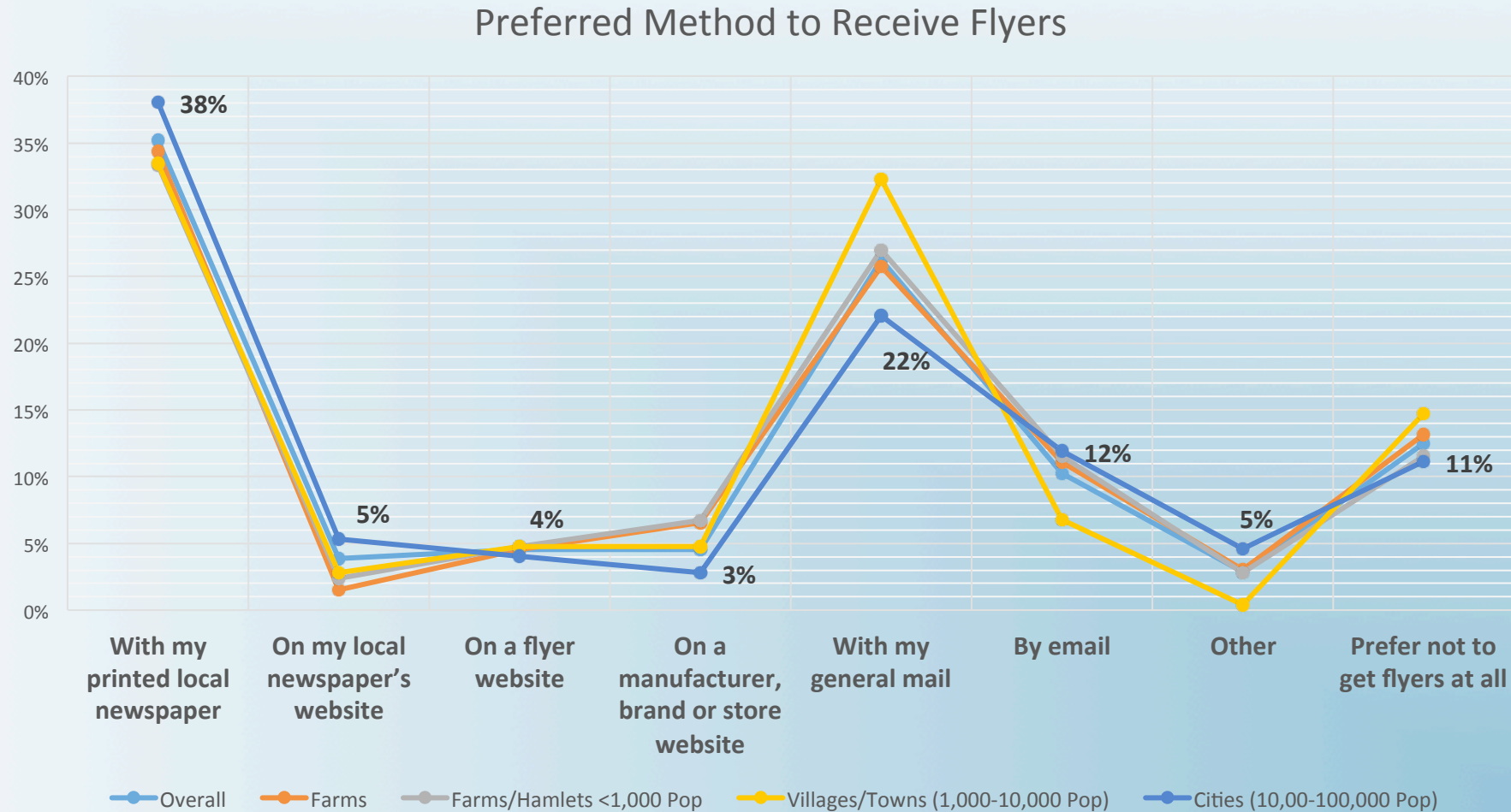
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Prairies: Communities Under 100,000 Population

The Majority of Respondents Overall Indicated a Preference for Receiving Flyers With Their Printed Local Newspaper



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Study Details

Interview Timing

December 2019/January 2020

CATI Interviews

Market Pulse

Study Management

Totum Research

Geographic Coverage

MB and SK Communities <100K

AB Communities <100K

Plus Active Farmers

Margin of Error

900 Interviews = $\pm 3.3\%$

At 95% confidence level

900 Adult Canadians Interviewed

225 Farm

225 Small Town/Village (<10K population)

225 Small city/Large Town (10K – 50K population)

225 Medium City (50K to 100K population)

Alberta 400 Interviews

Saskatchewan 291 Interviews

Manitoba 202 Interviews

Nunavut/NWT 7 Interviews

Last Birthday method used to select respondent in household.

No age or gender quotas.

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