



Newspaper Media Drive Vehicle Sales (Annotated AdWest Version)

December 2014



NEWSPAPERS CANADA



AdWest Introduction

- As you will see in the following Newspapers Canada presentation newspapers remain highly impactful throughout the automobile buying process.
- This research, conducted by Totum Research, measures the effectiveness of “Printed Newspapers” together with “Online Newspapers” against the other media commonly used by automotive advertisers.





AdWest Introduction

- In this AdWest Annotated version of the presentation we will draw special attention to aspects of print newspaper that Newspapers Canada study could not. As specialists in community markets, we are able to focus in detail on various types of communities.
- *Print newspapers are stronger and more influential in rural and smaller communities including MOST of the communities where automotive dealerships are located.*





AdWest Introduction

Throughout the presentation look for these symbols to represent the following information taken from the 2013 AdWest Media Usage Study:

COMMUNITY
RESILIENCE

MARKET SIZE
MATTERS:
SOURCES

MARKET SIZE
MATTERS:
RESPONSE

SEARCH:
Geo-targeted
Digital Display



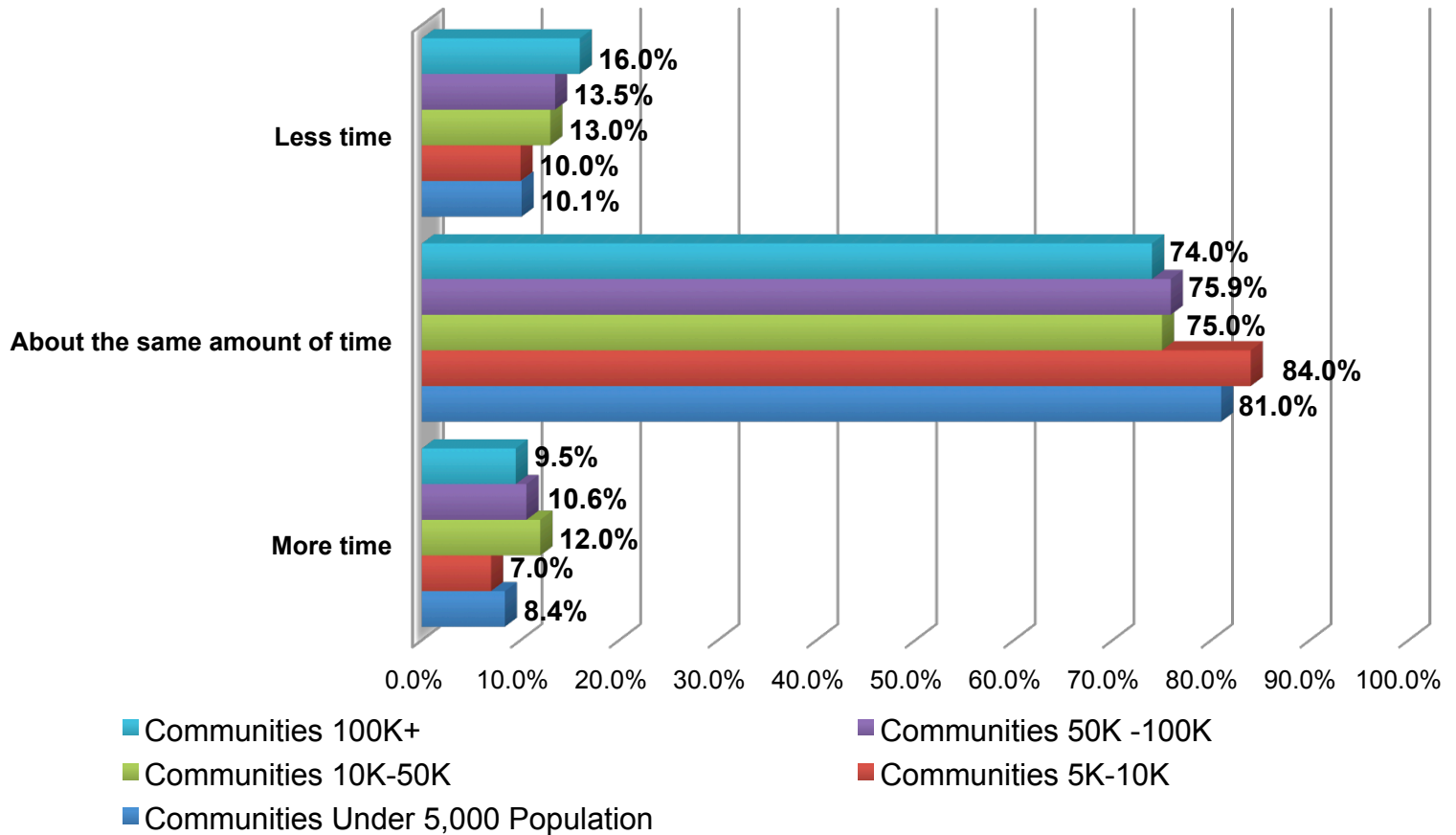
adwest



NEWSPAPERS CANADA

Amount of Time Personally Spent with Community Newspaper Compared to 2 Years Ago by Community Size

Three quarters of respondents across all community sizes report spending as much time with the community newspaper as they did 2 years ago.



**MARKET SIZE
MATTERS:
SOURCES**

Favourite Source for Information by Topic of Interest and Community Size

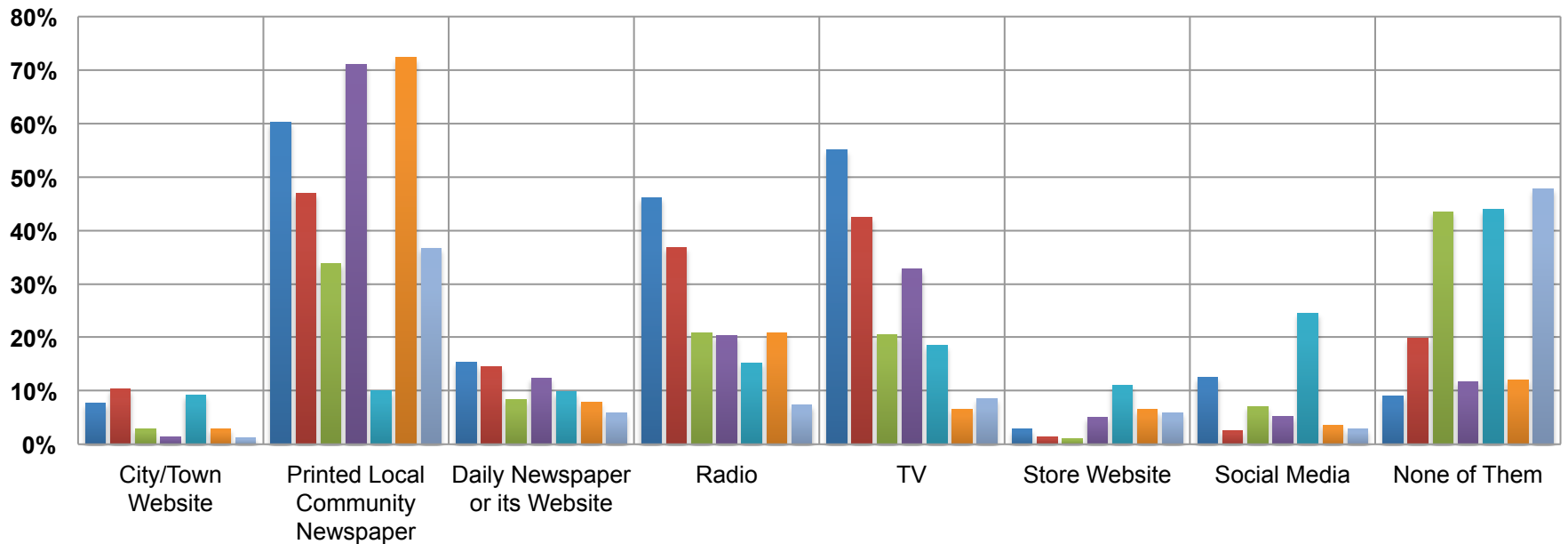
In communities of less than 50K, the local printed community newspaper was given as the favourite source for local information across ALL topics. Respondents in all community sizes indicate that a traditional media was the favourite source for information on all topics sourced.

	Communities Under 5,000 Population	Communities 5K-10K	Communities 10K-50K	Communities 50K -100K	Communities 50K+
Local Restaurants, Bars and Clubs	Printed Local Community Newspaper	Printed Local Community Newspaper	Printed Local Community Newspaper	Radio	Daily Newspaper or its Website
Other Local Businesses	Printed Local Community Newspaper	Printed Local Community Newspaper	Printed Local Community Newspaper	Printed Local Community Newspaper	Daily Newspaper or its Website
Community or Neighbourhood Events	Printed Local Community Newspaper	Printed Local Community Newspaper	Printed Local Community Newspaper	Printed Local Community Newspaper	Printed Local Community Newspaper
Local Weather	TV	TV	TV	TV	TV
Local Arts and Culture	Printed Local Community Newspaper	Printed Local Community Newspaper	Printed Local Community Newspaper	Radio	Daily Newspaper or its Website
Local Breaking News	TV	Radio	Radio	Radio	TV
Local Job Openings	Printed Local Community Newspaper	Printed Local Community Newspaper	Printed Local Community Newspaper	Daily Newspaper or its Website	Daily Newspaper or its Website
Local Traffic or Transportation	TV	Radio	Radio	Radio	Radio
Local Housing and Real Estate	Printed Local Community Newspaper	Printed Local Community Newspaper	Printed Local Community Newspaper	Printed Local Community Newspaper	Daily Newspaper or its Website
Local Schools and Education	Printed Local Community Newspaper	Printed Local Community Newspaper	Printed Local Community Newspaper	Daily Newspaper or its Website	Printed Local Community Newspaper
Local Crime	Printed Local Community Newspaper	Printed Local Community Newspaper	Printed Local Community Newspaper	Radio	Television

**MARKET SIZE
MATTERS:
RESPONSE**

Media Engagement, Sharing and Response: COMMUNITIES 10K >

Respondents were more likely to feel inspired by, trust and share information from and notice ads in the local printed community newspaper. The majority also indicated they'd be most likely to be inspired to purchase by the local newspaper



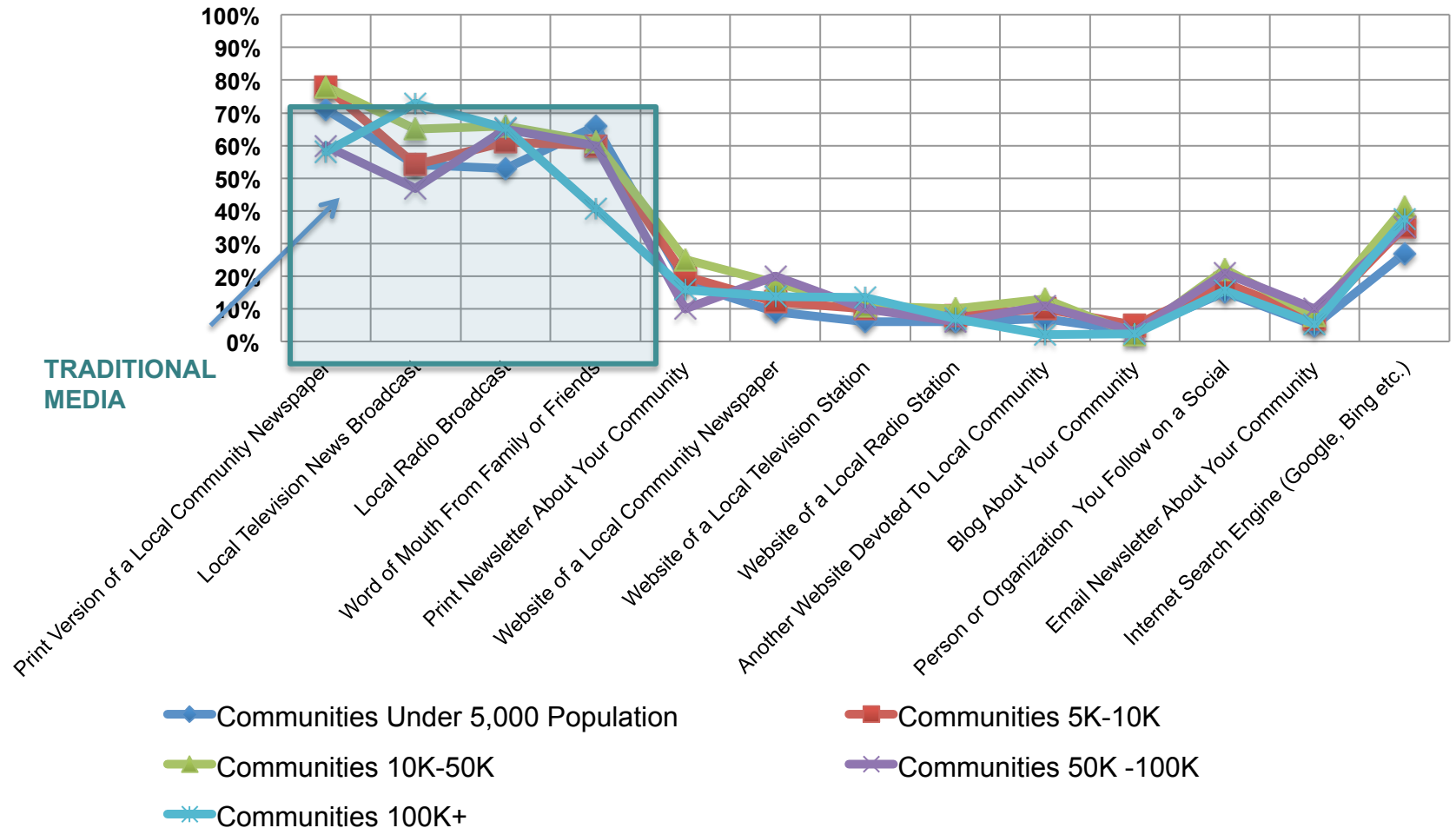
- Most Likely to Share Information From This Source
- Feel Inspired to Take Action by This Source
- Generally Ignore the Ads in This Source
- Ads From This Source Are Most Likely to Inspire Purchase

- Most Likely to Trust Information From This Source
- Usually Notice the Ads in This Source
- Source Best Place to Find Advertising For Local Stores/Services

SEARCH:
Geo-targeted
Digital Display

Media Used to Consume Local News and Information at Least Once Per Week by Community Size

In all but one community size, the local printed community newspaper was reported by the majority of respondents as being used at least once per week to consume local news and information





Study Design

- Study:** Online panel (Yconic formally Uthink) sampling 2,461 Canadians by Totum Research on behalf of Newspapers Canada
- Timing:** October 2014
- Scope:** National: English (83%) and French (17%)
- Targets:** Age, gender and regional targets were applied to ensure valid representation*
- Presentation:** Based on 487 buyers of new vehicles in the past two years
- Variance:** Margin of error $\pm 4.4\%$ at the 95% confidence level





Executive Summary

Newspaper media (print + web) are the most impactful at every stage of the vehicle buying process, with the earliest stage showing particular strength. Individually, each medium performs well, with print scoring #1 or #2 at each stage out of 11 media, and newspaper websites scoring #3 or #4.

For triggering visits to 3 types of vehicle websites (manufacturer, brand/model and dealer), newspaper media perform best! By medium, print newspapers are #1 and newspaper websites score in the top 5 for each of the three vehicle websites. 20% never visit these vehicle sites.

For triggering a visit to a car dealership, newspaper media score well above all else: print newspapers score #1 and newspaper websites perform solidly at #3.

For booking a test drive, newspaper media and other non-auto websites~ score above all others. By medium, print newspapers are #2 and newspaper websites are #3.

Print newspapers proved to be the #1 medium for providing general information, comparing prices and deciding where to buy or lease from. Newspaper websites are the #1 medium for sourcing specific information on vehicles.

75% indicated that they read vehicle ads in print newspapers!

Social media: Only 14% look at vehicle ads and 24% do not use it at all!



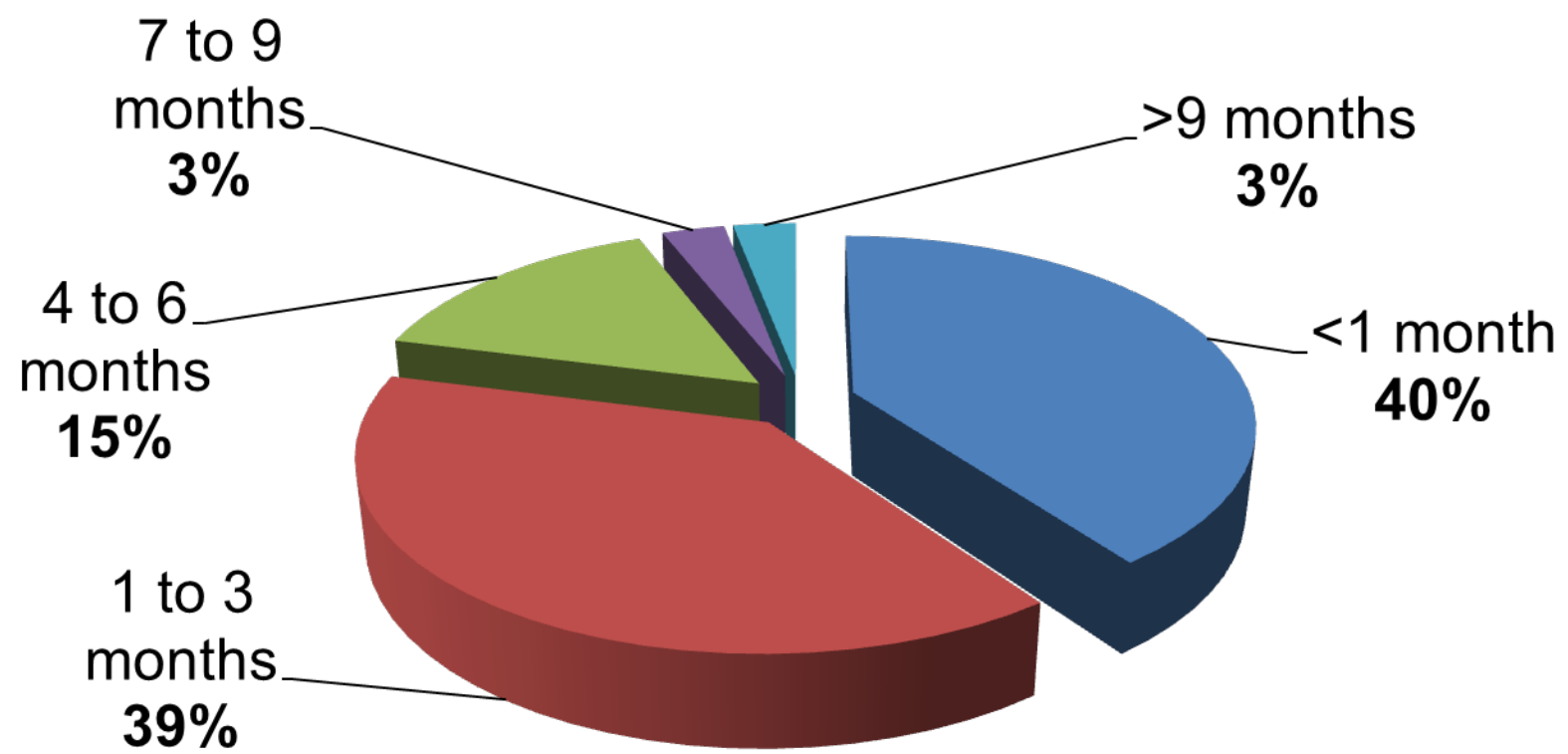


Vehicle Buying Process





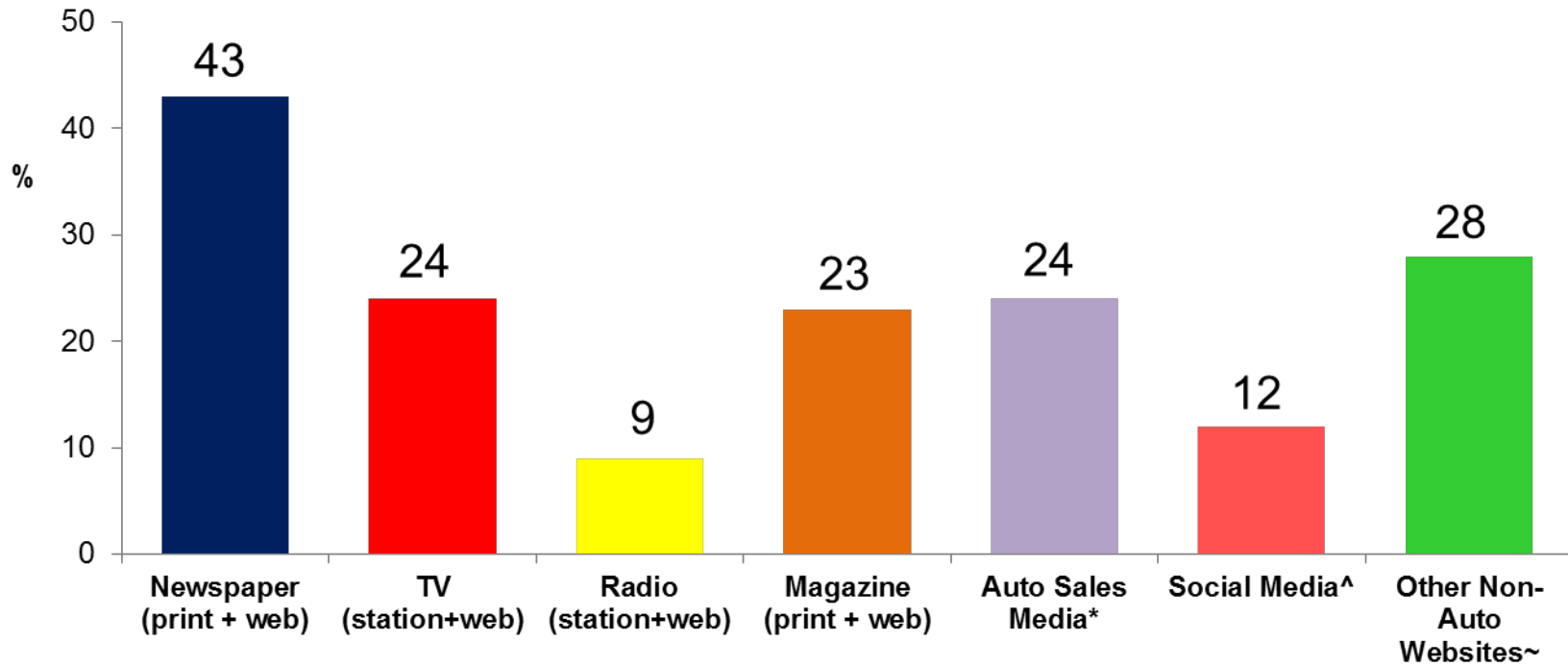
The Average Vehicle Buying Process Lasts 2 1/2 Months



Average = 2.4 months



Media That Influence Vehicle Decisions (Stage 1 → Thinking About Buying)



- Newspaper media are the top influence at Stage 1!
- Print newspapers lead all media at 30%!
- Newspapers (print + web) present brand message at the right time.

Totum Research: Canadian Adults 18+ bought a new vehicle in the past 2 years – November 2014

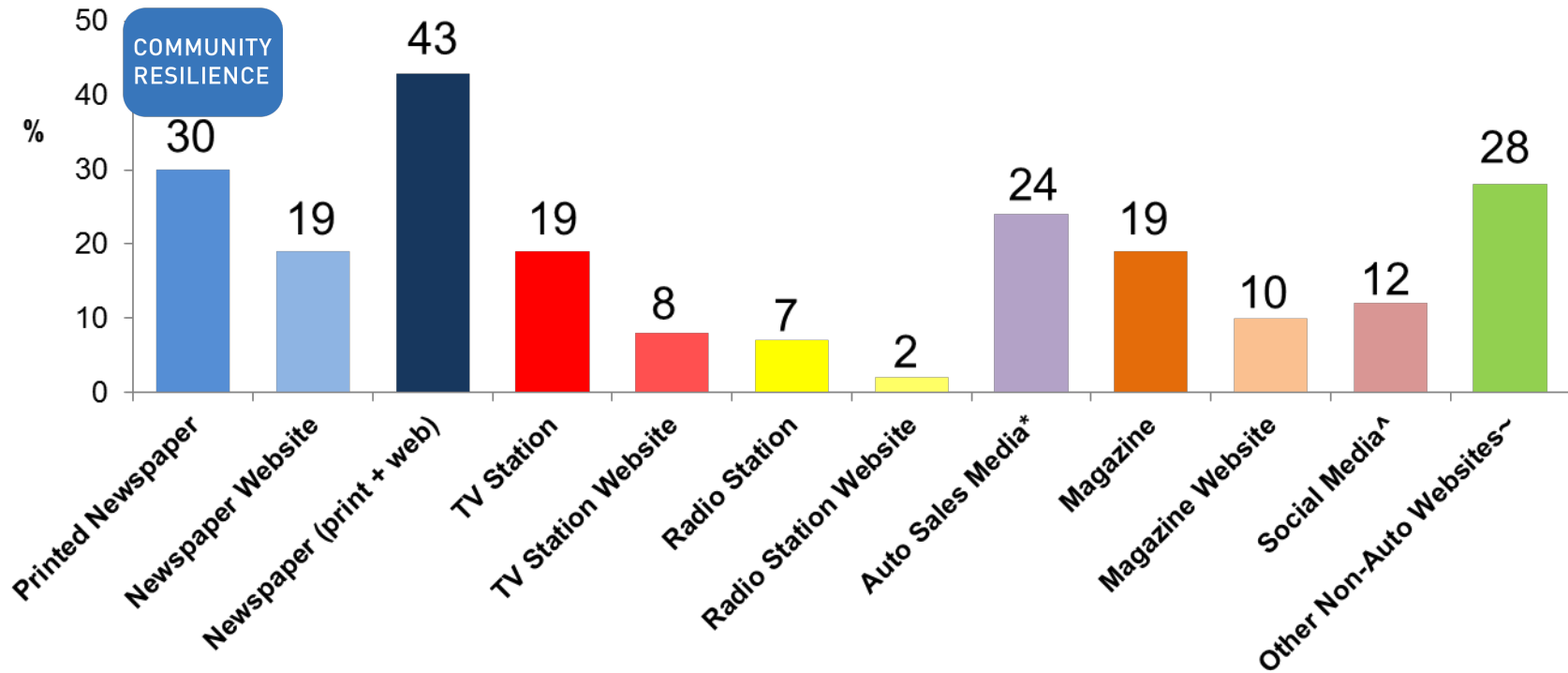
*Autotrader, Kijiji, etc. (print + web) ^Facebook, Twitter, Google+, etc. ~Websites excluding those listed and Auto Manufacturer, Model and Retailer sites



NEWSPAPERS CANADA



Media That Influence Vehicle Decisions (Stage 1 → Thinking About Buying)



- Print newspapers are the top medium and newspaper sites score well!
- Newspapers (print + web) together = Powerhouse!
- Both present brand and model messages at the right time.

Totum Research: Canadian Adults 18+ bought a new vehicle in the past 2 years – November 2014

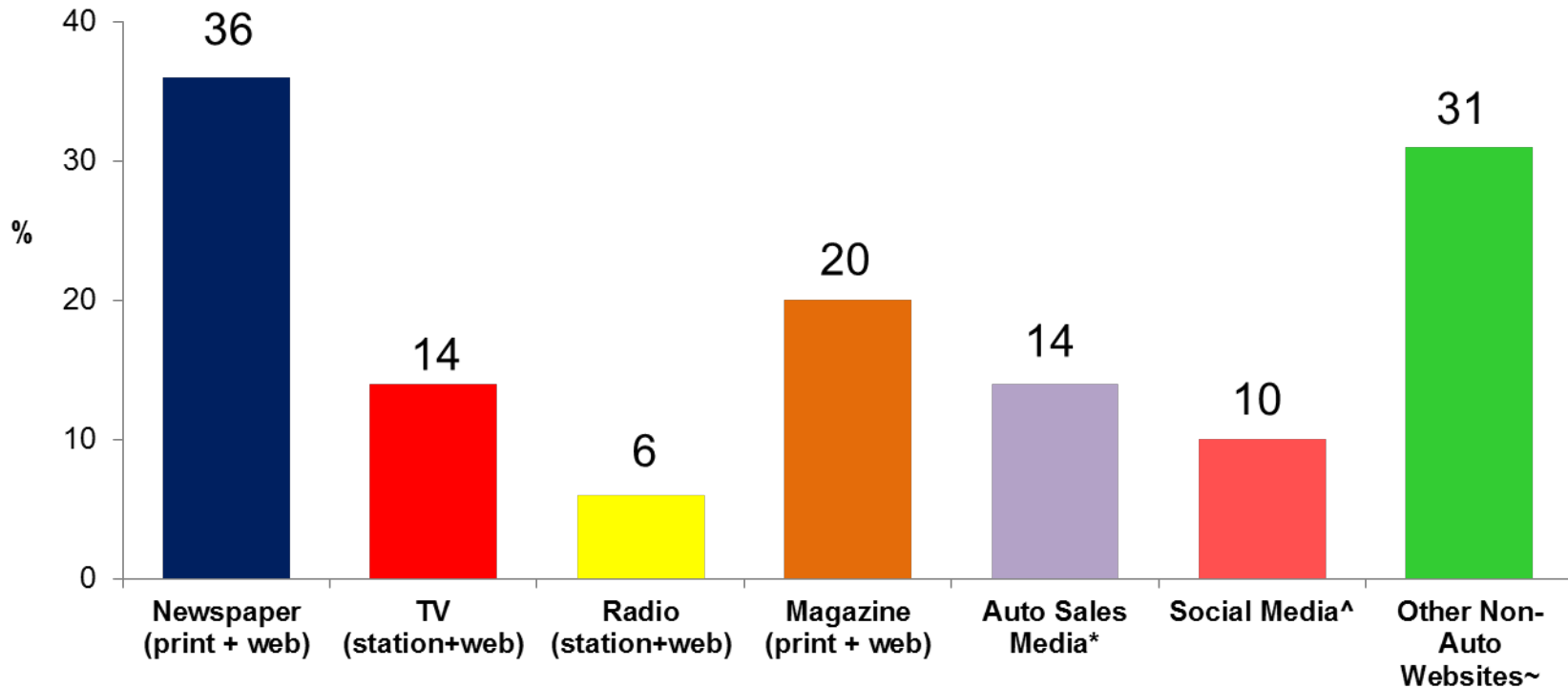
*Autotrader, Kijiji, etc. (print + web) ^Facebook, Twitter, Google+, etc. ~Websites excluding those listed and Auto Manufacturer, Model and Retailer sites



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Media That Influence Vehicle Decisions (Stage 2 → Researching)



- Newspapers (print + web) are the lead media in the research stage!
- Print newspapers are second only to other non-auto websites at 23%.

Totum Research: Canadian Adults 18+ bought a new vehicle in the past 2 years – November 2014

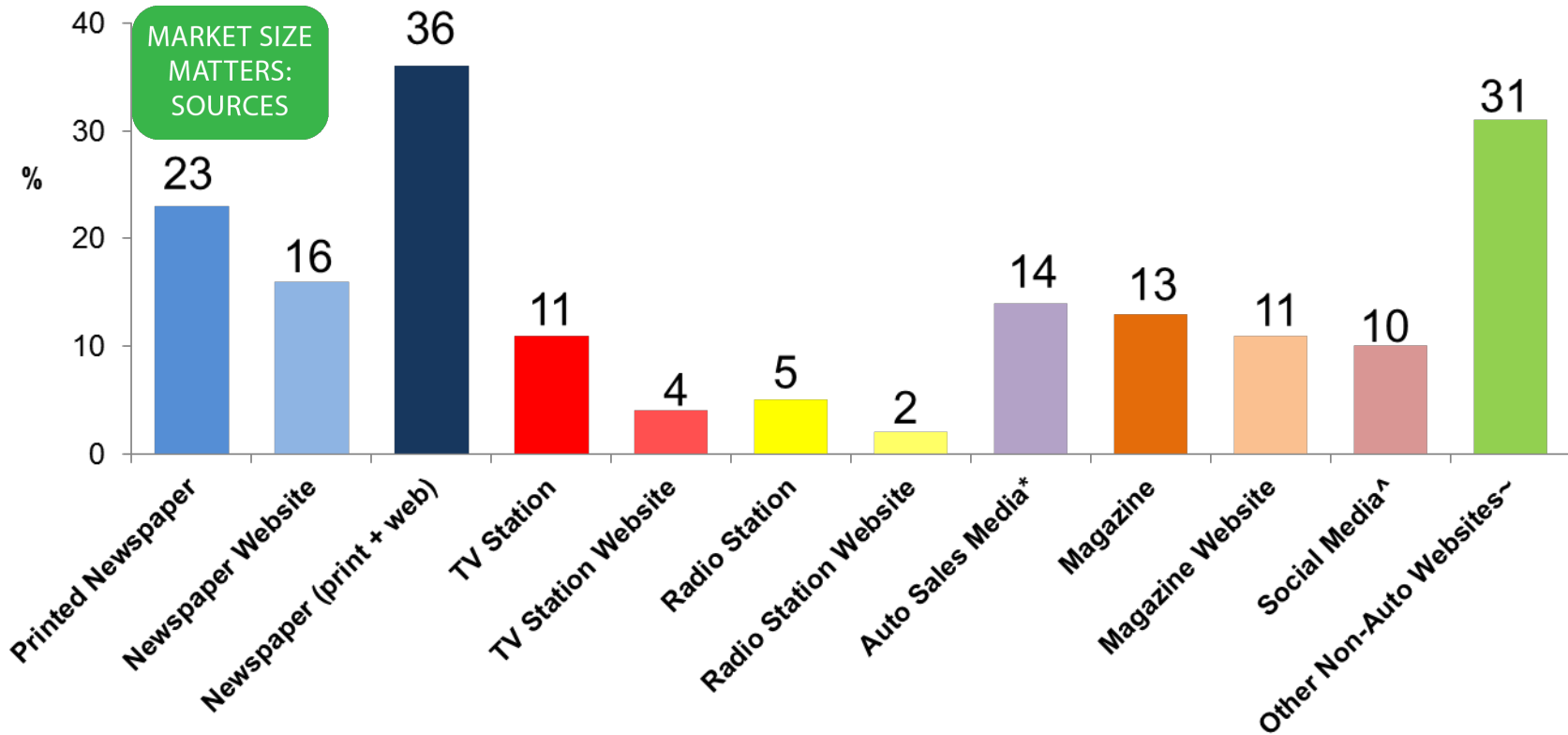
*Autotrader, Kijiji, etc. (print + web) ^Facebook, Twitter, Google+, etc. ~Websites excluding those listed and Auto Manufacturer, Model and Retailer sites



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Media That Influence Vehicle Decisions (Stage 2 → Researching)



- Newspaper (print + web) is the key source.
- Newspaper and its sites are each top after other non-auto sites.

Totum Research: Canadian Adults 18+ bought a new vehicle in the past 2 years – November 2014

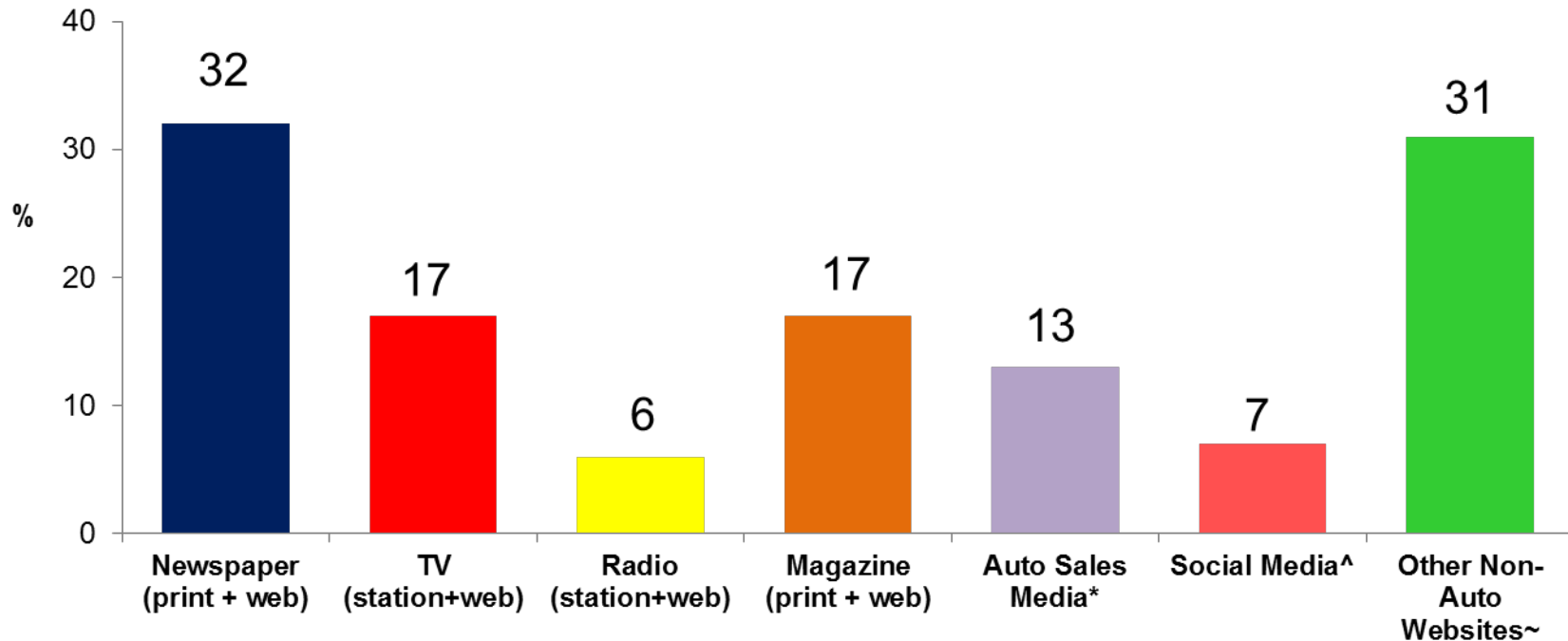
*Autotrader, Kijiji, etc. (print + web) ^Facebook, Twitter, Google+, etc. ~Websites excluding those listed and Auto Manufacturer, Model and Retailer sites



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Media That Influence Vehicle Decisions (Stage 3 → Ready to Make Purchase)



- Newspaper media engage audiences throughout the vehicle path to purchase.
- Print newspapers (21%) are second only to other non-auto websites.

Totum Research: Canadian Adults 18+ bought a new vehicle in the past 2 years – November 2014

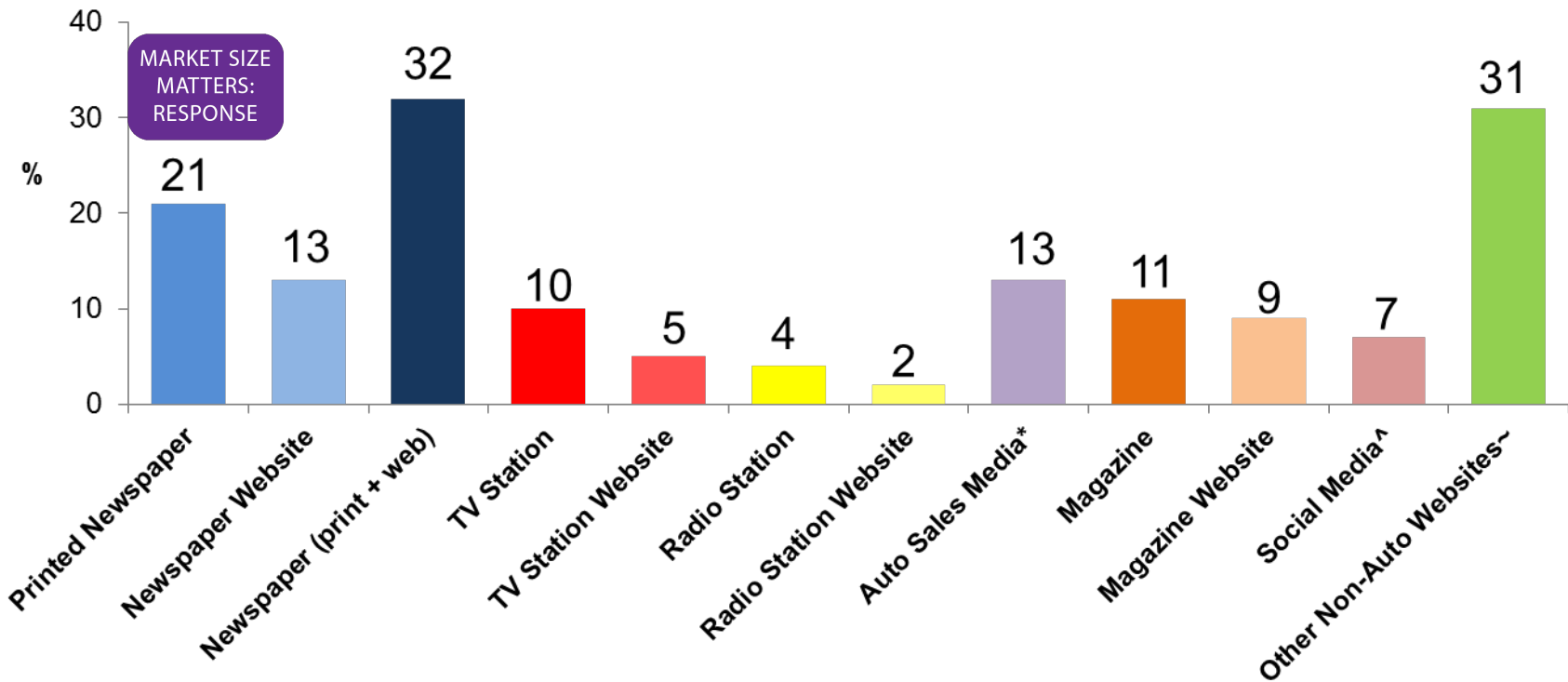
*Autotrader, Kijiji, etc. (print + web) ^Facebook, Twitter, Google+, etc. ~Websites excluding those listed and Auto Manufacturer, Model and Retailer sites



NEWSPAPERS CANADA



Media That Influence Vehicle Decisions (Stage 3 → Ready to Make Purchase)



- Newspaper (print + web) earns #1 spot.
- Newspaper and its sites are each top after 'other non-auto sites'.
- Newspaper media highlight price and where to buy before purchase.

Totum Research: Canadian Adults 18+ bought a new vehicle in the past 2 years – November 2014

*Autotrader, Kijiji, etc. (print + web) ^Facebook, Twitter, Google+, etc. ~Websites excluding those listed and Auto Manufacturer, Model and Retailer sites



NEWSPAPERS CANADA



Vehicle Buying Process Summary

Over the two-and-a-half-month vehicle buying process, newspapers (print + web) are the most influential medium, demonstrating the potential power of a combined buy.

In the early stage, print newspaper scored as the top medium influencing the vehicle buying process!

At every stage, print newspaper is a significant medium (top 1 or 2) as are newspaper websites (scoring in the top 3 or 4).

Newspaper advertising can therefore be effective at all stages - for branding as well as price/location/website information.

COMMUNITY
RESILIENCE

MARKET SIZE
MATTERS:
SOURCES

MARKET SIZE
MATTERS:
RESPONSE



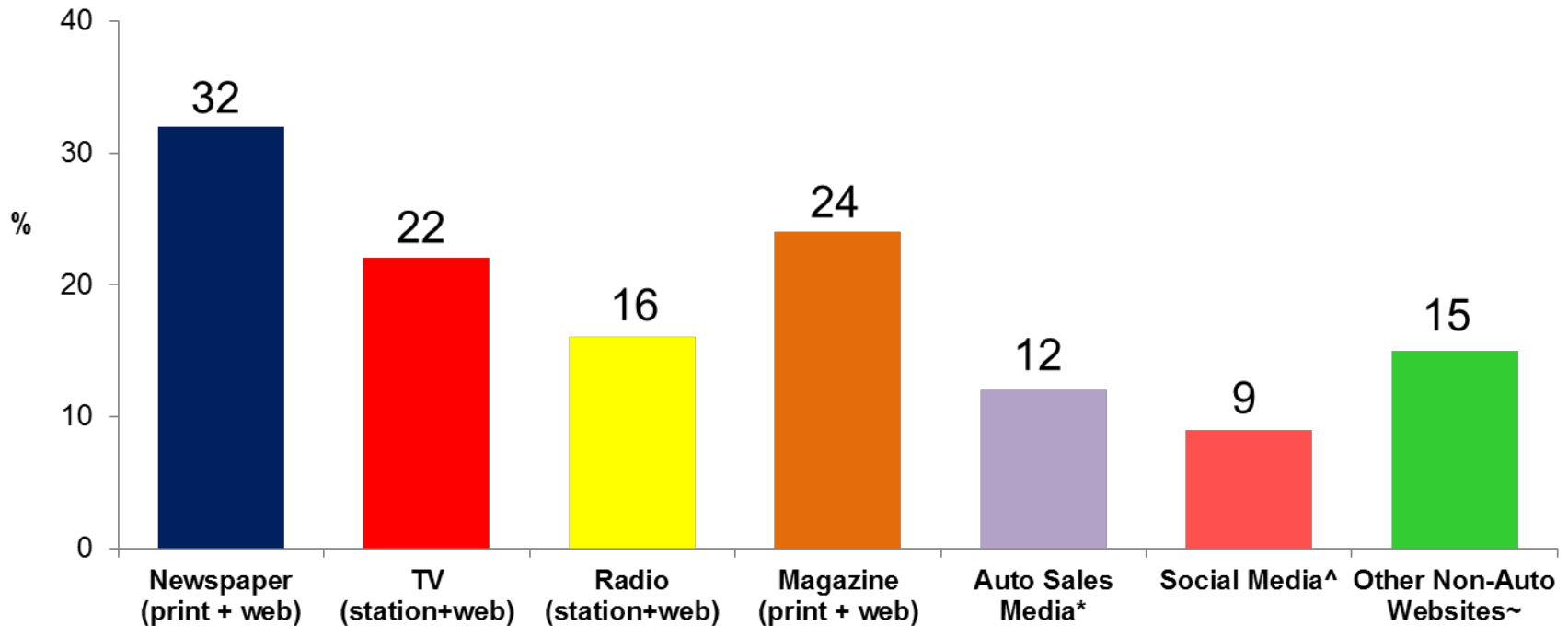


Media Triggering Visits to Websites





Media That Trigger Visits to Vehicle Websites (Vehicle Manufacturer Sites)



- Newspaper media are top triggers to visit vehicle manufacturer websites.
- Print newspapers lead all at 23%.
- Newspapers (print + web) increase the desire for even more information.

Totum Research: Canadian Adults 18+ bought a new vehicle in the past 2 years – November 2014

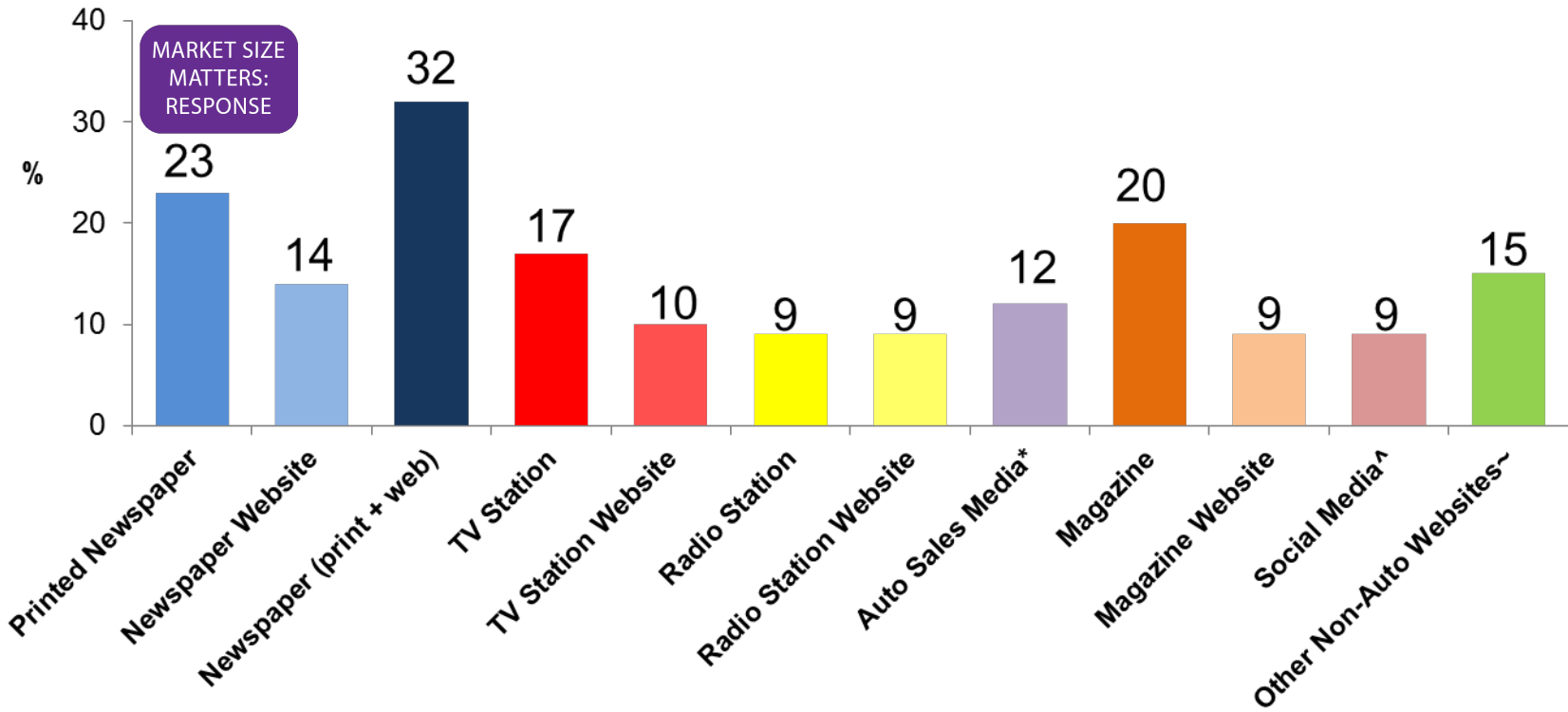
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NEWSPAPERS CANADA



Media That Trigger Visits to Vehicle Websites (Vehicle Manufacturer Sites)



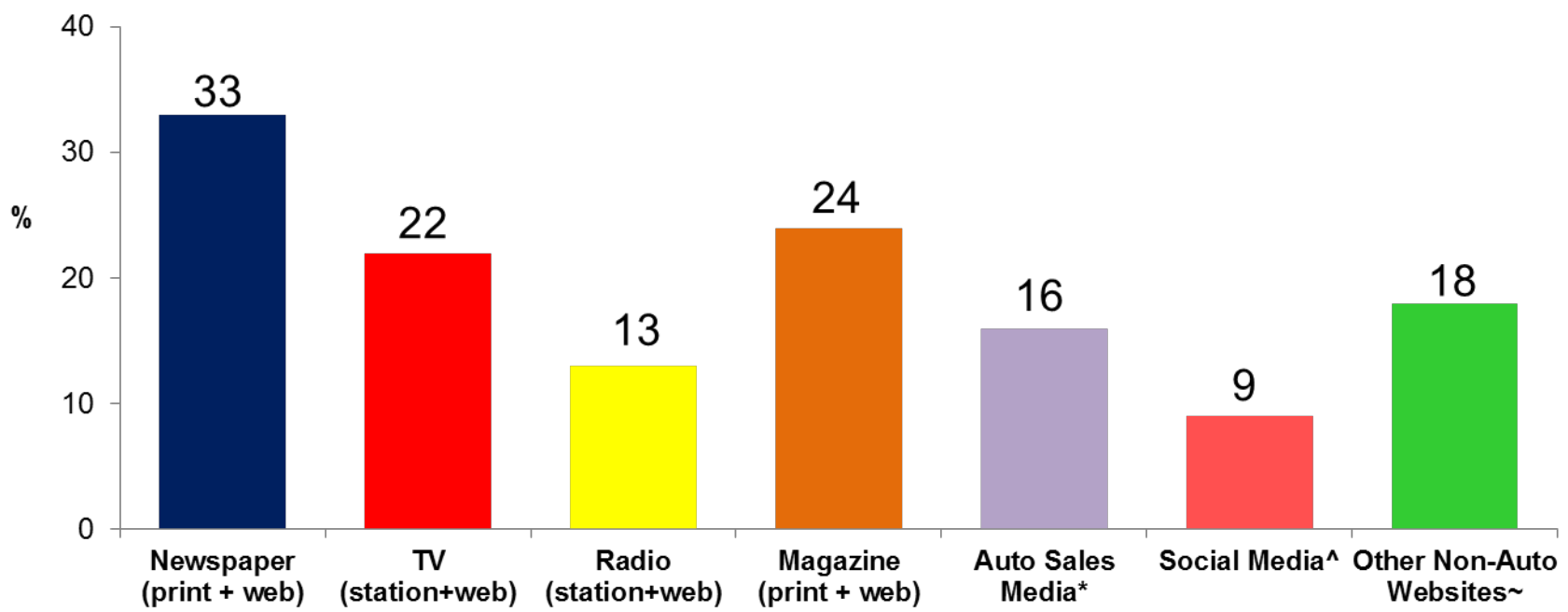
- Newspaper print + web combined earns the #1 spot by far.
- By medium, print newspaper scores the highest!

Totum Research: Canadian Adults 18+ bought a new vehicle in the past 2 years – November 2014

*Autotrader, Kijiji, etc. (print + web) ^Facebook, Twitter, Google+, etc. ~Websites excluding those listed and Auto Manufacturer, Model and Retailer sites



Media That Trigger Visits to Vehicle Websites (Vehicle Brand or Model Sites)



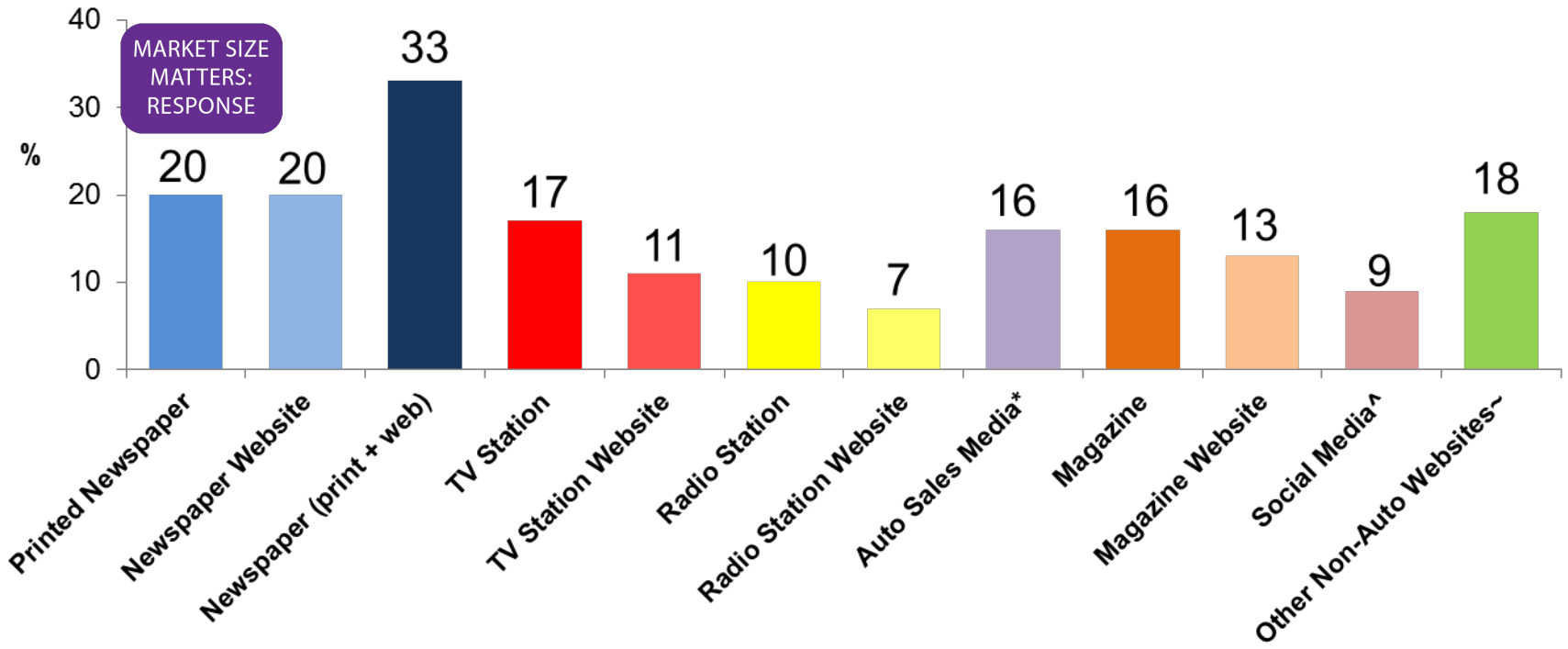
- Newspaper media are also top triggers to visit vehicle brand/model websites.
- Print newspapers and newspaper websites lead all at 20% each.
- Newspapers (print + web) lead to a search for more specific brand information.

Totum Research: Canadian Adults 18+ bought a new vehicle in the past 2 years – November 2014

*Autotrader, Kijiji, etc. (print + web) ^Facebook, Twitter, Google+, etc. ~Websites excluding those listed and Auto Manufacturer, Model and Retailer sites



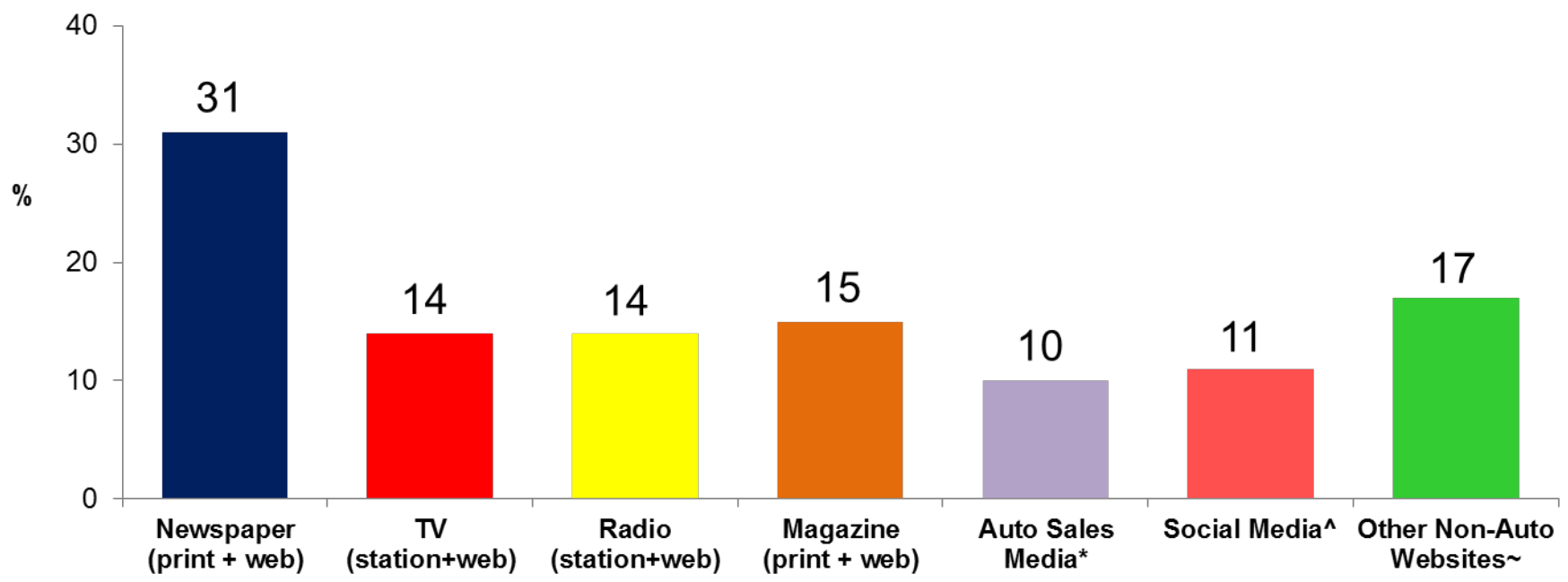
Media That Trigger Visits to Vehicle Websites (Vehicle Brand or Model Sites)



- Newspaper (print + web combined) drives visits to vehicle brand/model sites!
- Print newspaper and newspaper website each out-perform other media.



Media That Trigger Visits to Vehicle Websites (Vehicle Dealer Sites)



- Newspaper media are the most significant triggers of visits to vehicle dealer sites.
- Print newspapers lead all media at 24%.
- Newspapers (print + web) drive potential buyers to retail websites.

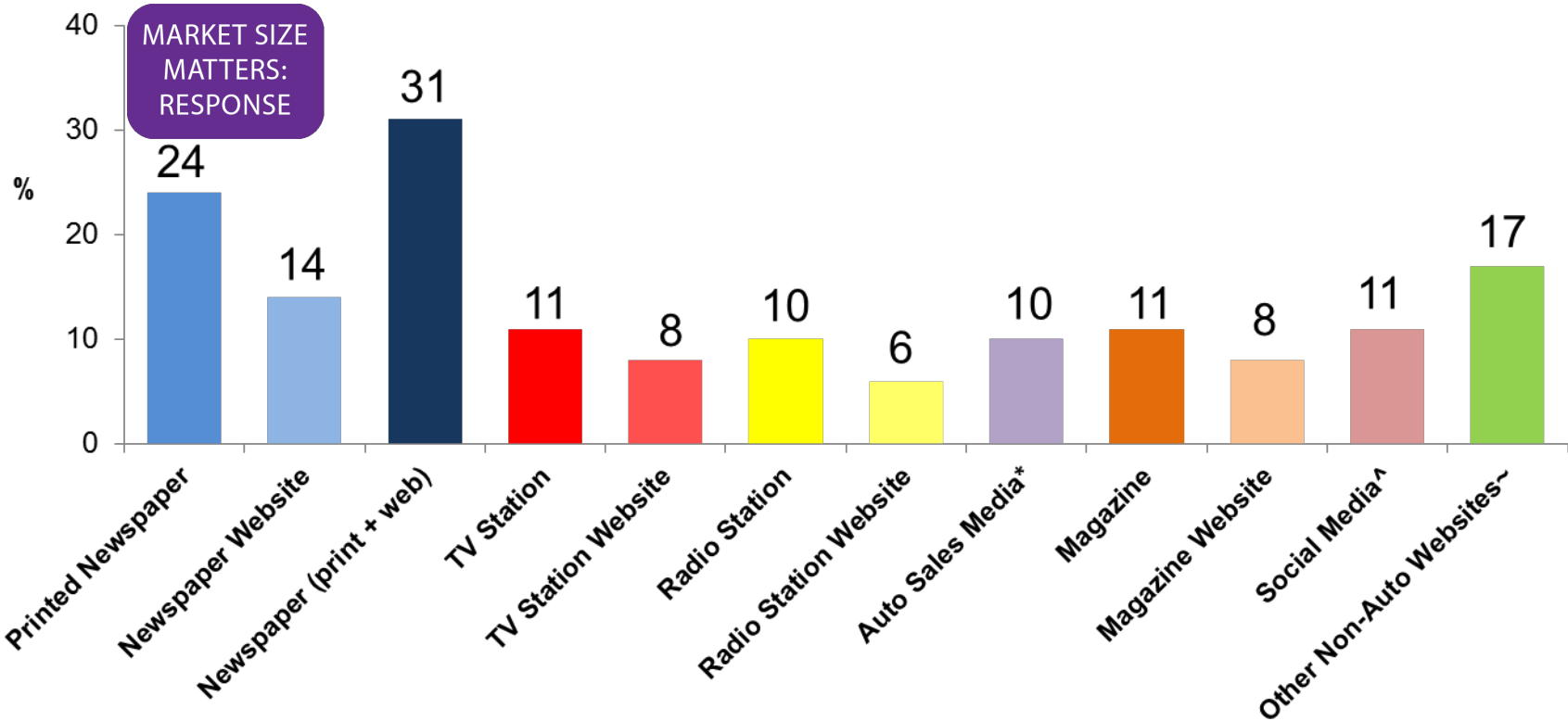
Totum Research: Canadian Adults 18+ bought a new vehicle in the past 2 years – November 2014

*Autotrader, Kijiji, etc. (print + web) ^Facebook, Twitter, Google+, etc. ~Websites excluding those listed and Auto Manufacturer, Model and Retailer sites





Media That Trigger Visits to Vehicle Websites (Vehicle Dealer Sites)



- Newspapers (print + web) are the top trigger of visits.
- On an individual medium basis, they are each in the top 3 sources.

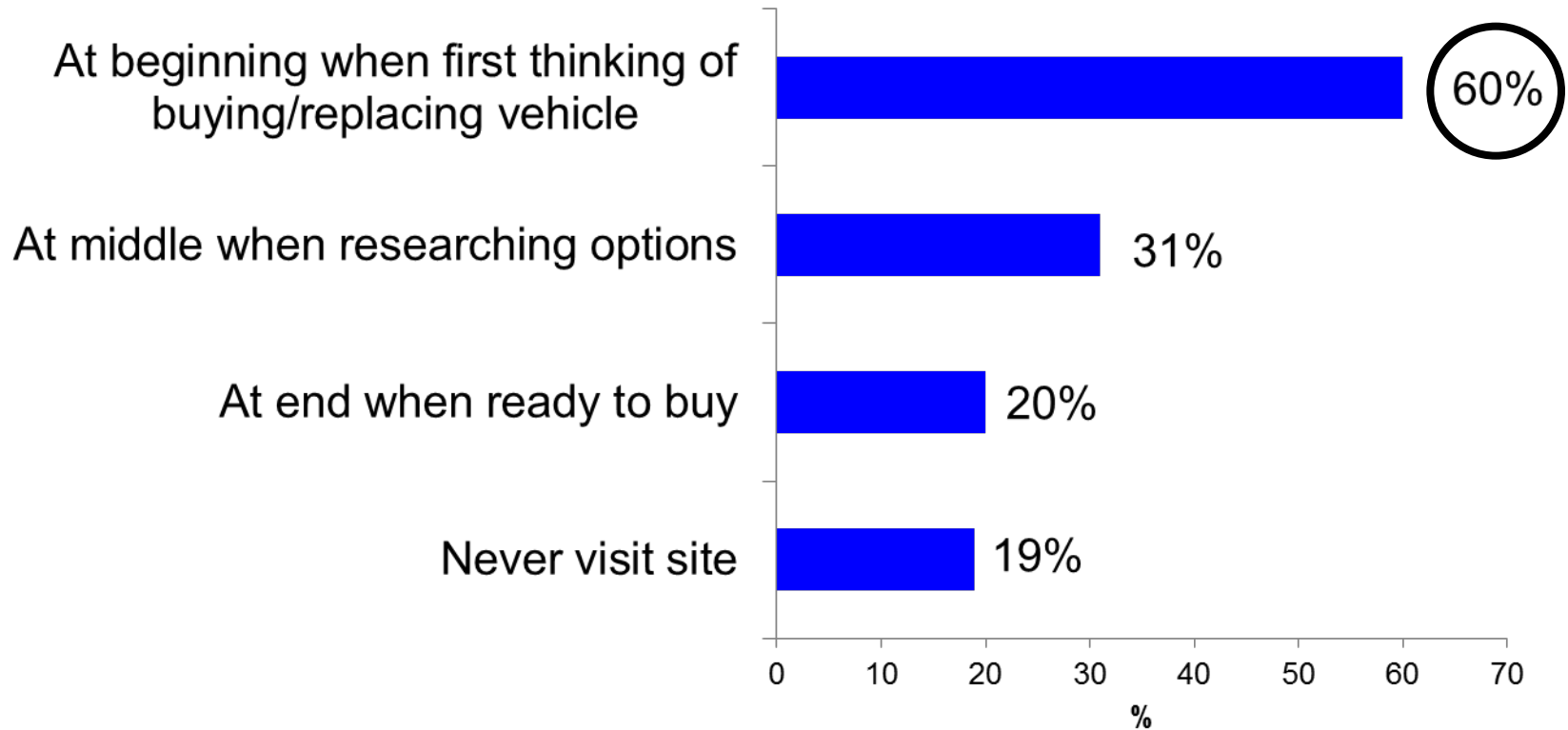
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Stage of Purchasing Cycle: Vehicle Manufacturer Website Visited

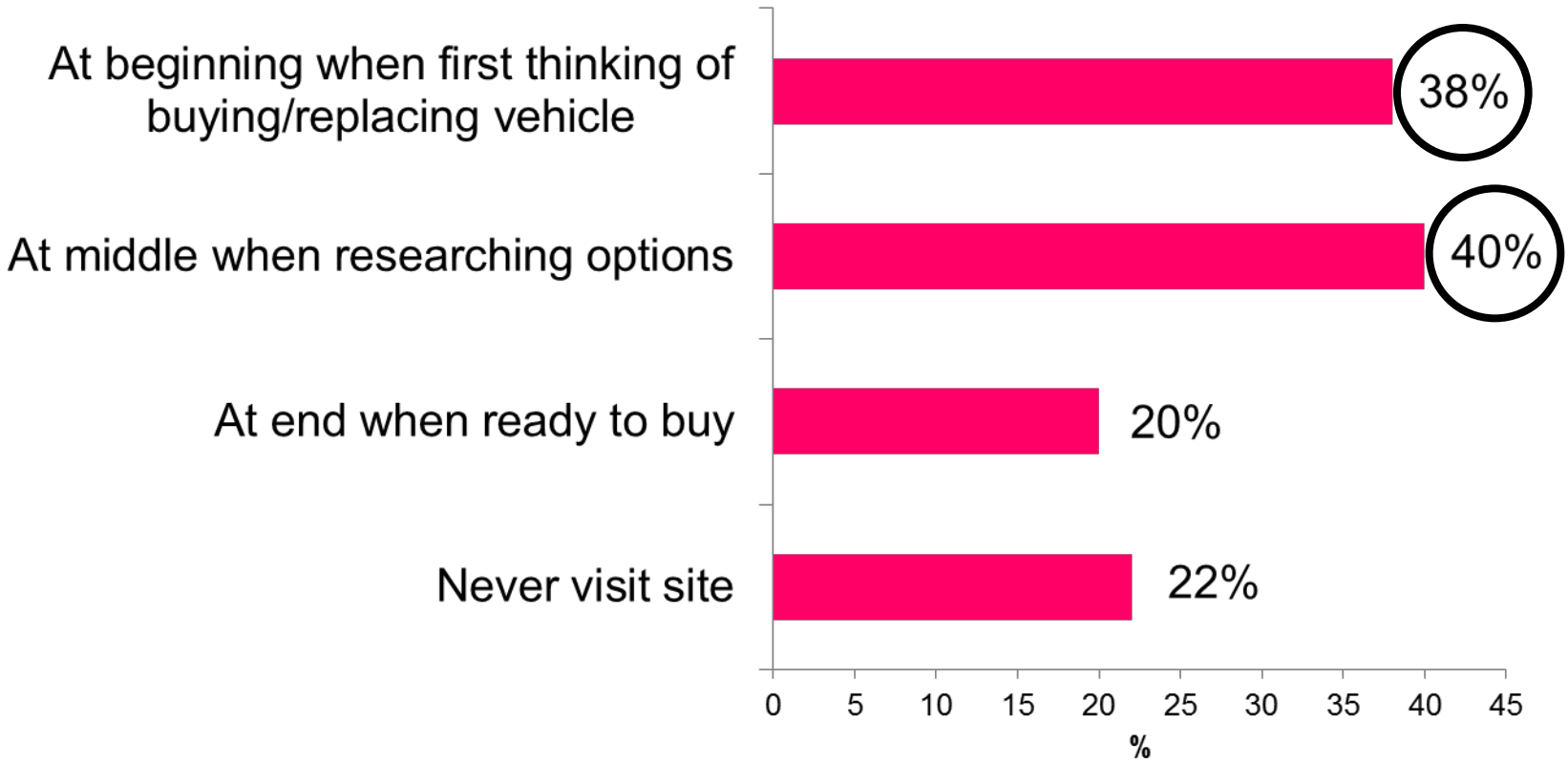


Print newspapers are the key source, newspaper websites are a top source, and combined, they are a powerhouse during the early purchase stages. Ads placed in newspaper media drive traffic to the vehicle manufacturers' websites.





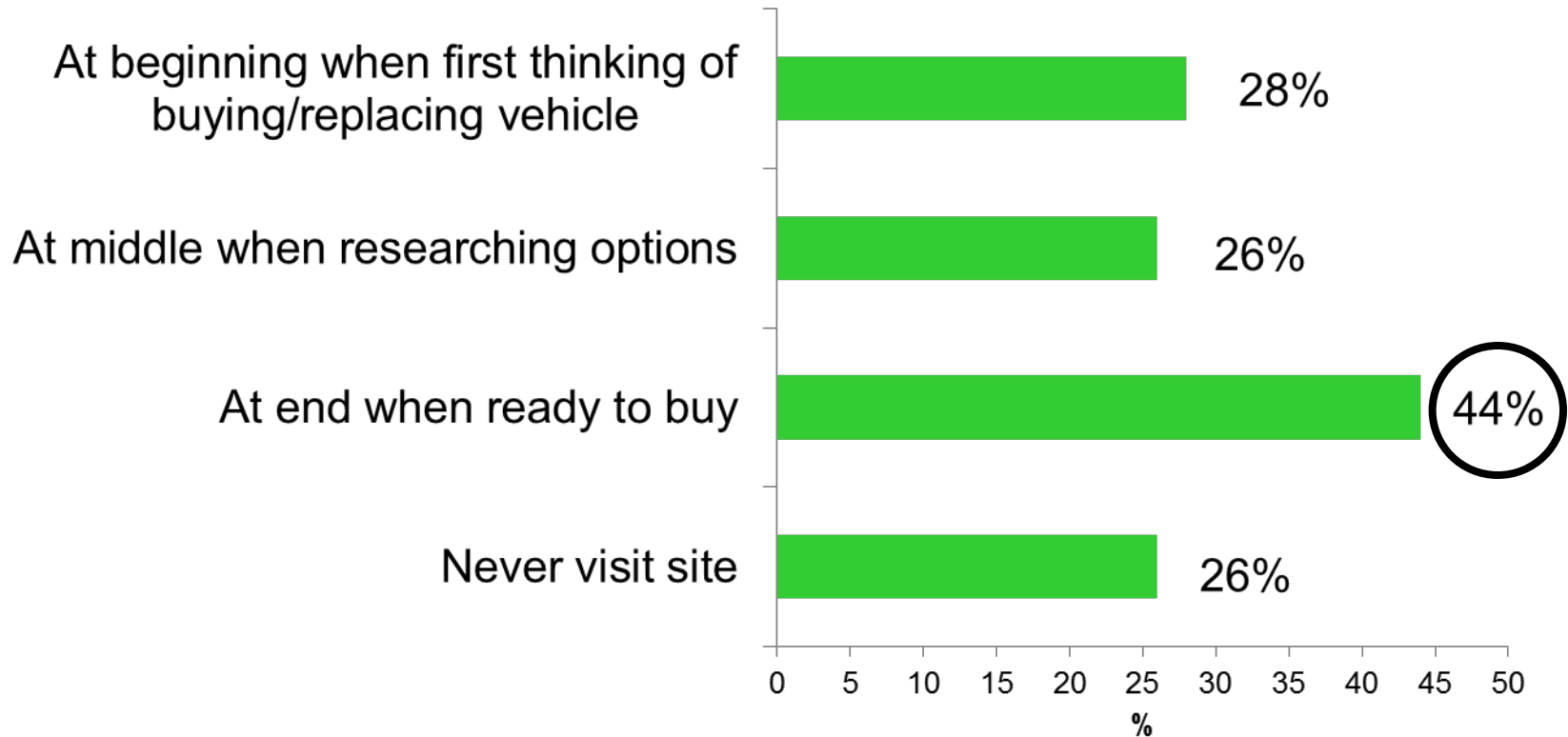
Stage of Purchasing Cycle: Vehicle Brand/Model Website Visited



Newspapers (print + web) drive vehicle brand and model visits. They are the top source at the beginning and middle research phases of the vehicle purchase.



Stage of Purchasing Cycle: Vehicle Dealer Website Visited



Newspapers (print + web) are the top source of information in the final stage of the purchase cycle. On an individual basis, they are both in the top 3 sources.



Stages of Vehicle Path to Purchase

Stage	Description of Stage	Visited Vehicle Manufacturer Site	Visited Vehicle Brand/ Model Site	Visited Vehicle Dealer site
<u>Stage 1</u>	First thinks of buying or replacing	60%	38%	28%
<u>Stage 2</u>	When researching options	31%	40%	26%
<u>Stage 3</u>	Ready to buy	20%	20%	44%
Did not visit website		19%	22%	26%

- 60% will visit a manufacturer website when first thinking of buying.
- 38% will visit the brand/model website when first thinking of buying and 40% when researching vehicles to purchase.
- 44% will visit the dealer website when ready to buy.
- Roughly 20% do not visit these vehicle sites at all!



Stages of Vehicle Path to Purchase

Stage [^]	Site Most Visited [~]	TOTAL	BY MEDIUM	
		Newspaper Print + Web	Newspaper Print*	Newspaper Web*
<u>Stage 1</u>	Visit Vehicle Manufacturer site Visit Vehicle Brand site	#1	#1	#4
<u>Stage 2</u>	Visit Vehicle Brand site	#1	#2	#3
<u>Stage 3</u>	Visit Auto Dealer site	#1	#2	#3

MARKET SIZE MATTERS: RESPONSE

- Newspaper (print + web) is #1 for driving visits to all vehicle sites.
- By medium, print newspapers and their sites are the top drivers!

[^] Stage 1 = First thinks of buying/replacing, Stage 2 = When Researching options, Stage 3 = Ready to Buy

[~] Sites = Vehicle Manufacturer, Brand or Vehicle Dealer

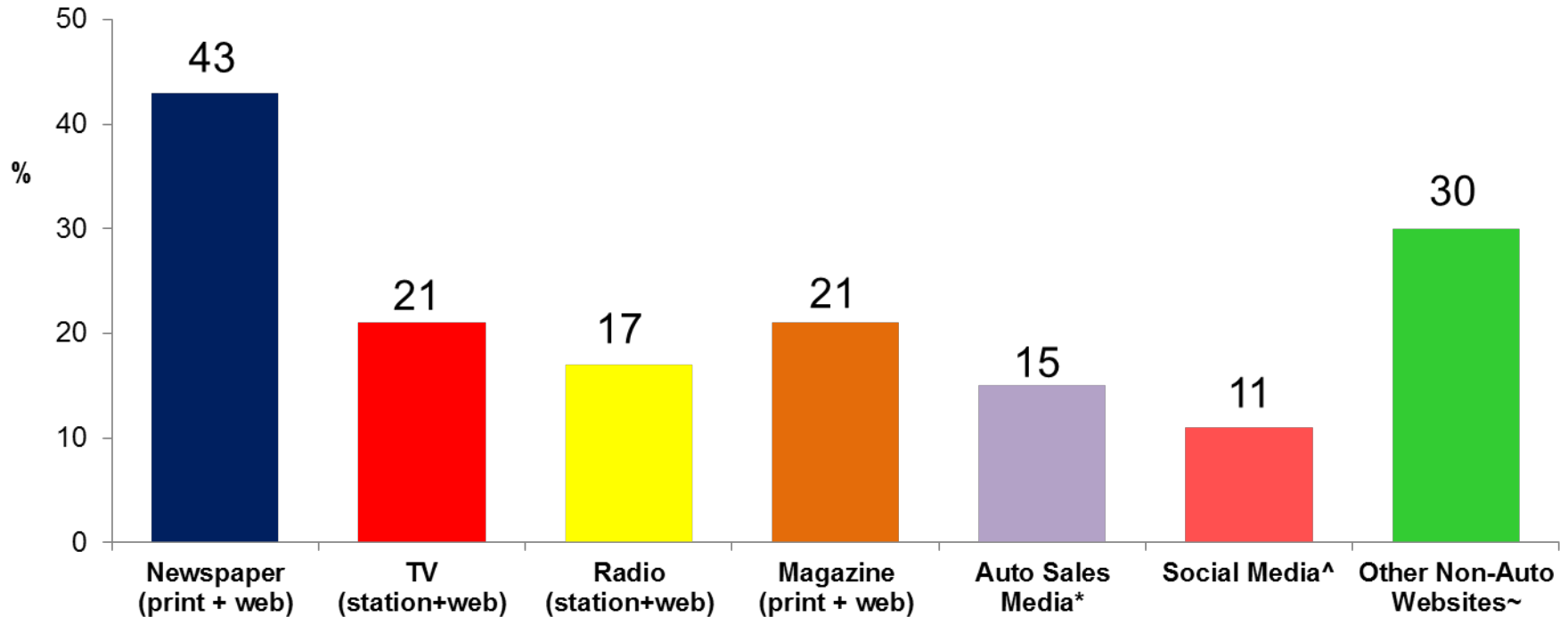
* Out of 11 media: print newspaper, newspaper website, TV station, TV website, radio station, radio website, auto sales media (e.g. Autotrader, Kijiji, etc.), magazines print, magazine website, social media (e.g. Facebook, Twitter, Google+, etc.), other non-auto websites (i.e. sites not listed here and excluding auto manufacturer, model & retailer sites)

Totum Research: Canadian Adults 18+ bought a vehicle in the past 2 years – November 2014





Media That Trigger Visit to Vehicle Dealership



- Newspaper media are the most important for triggering visits to vehicle dealers.
- Print newspapers are #1, outpacing most other media by far.
- Newspaper websites are #3, also significantly higher than most other media.

Totum Research: Canadian Adults 18+ bought a new vehicle in the past 2 years – November 2014

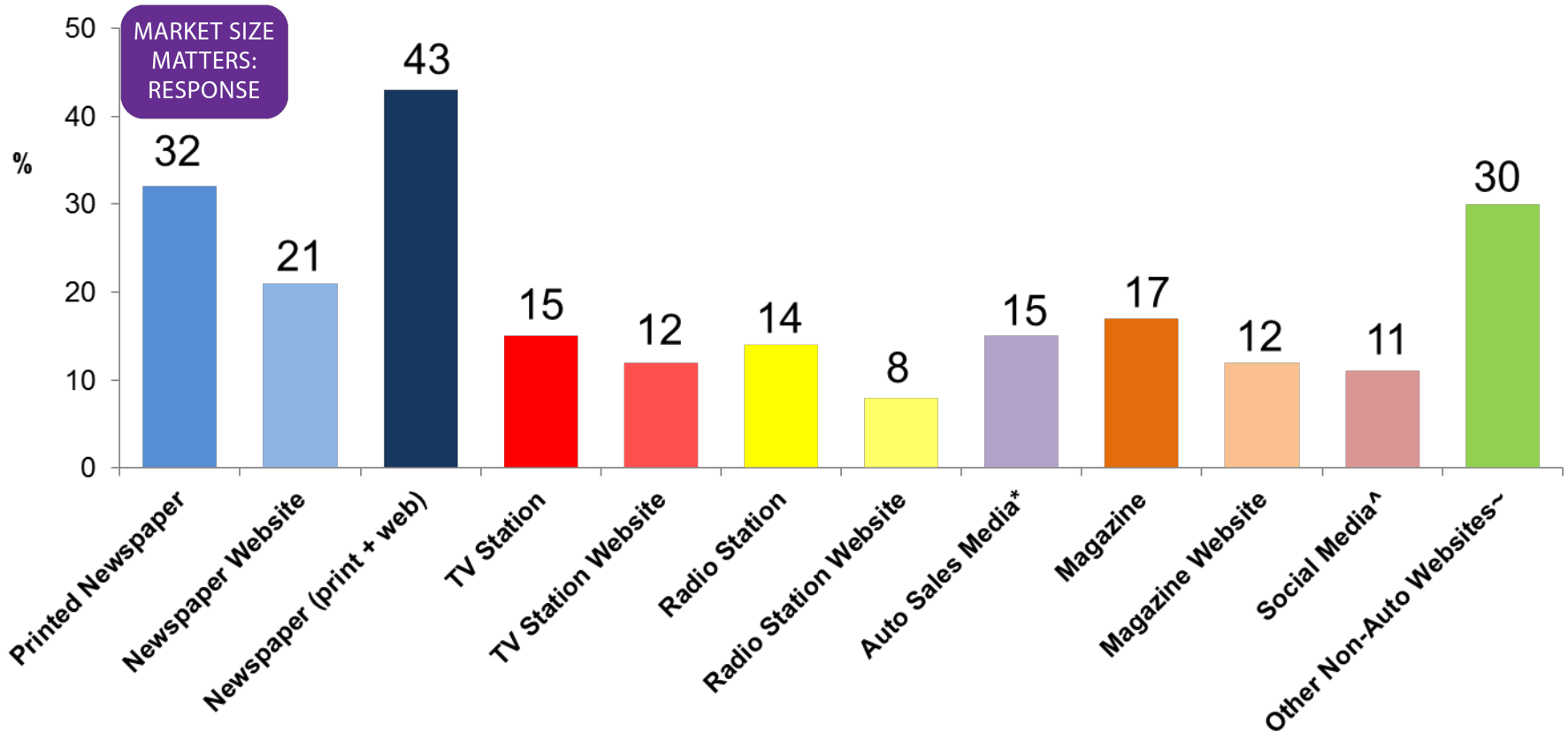
*Autotrader, Kijiji, etc. (print + web) ^Facebook, Twitter, Google+, etc. ~Websites excluding those listed and Auto Manufacturer, Model and Retailer sites



NEWSPAPERS CANADA



Media That Trigger Visit to Vehicle Dealership



- Newspaper (print + web) is tops on triggering a visit to a vehicle dealer!
- Print newspapers are the #1 medium, outpacing most other media by far.

Totum Research: Canadian Adults 18+ bought a new vehicle in the past 2 years – November 2014

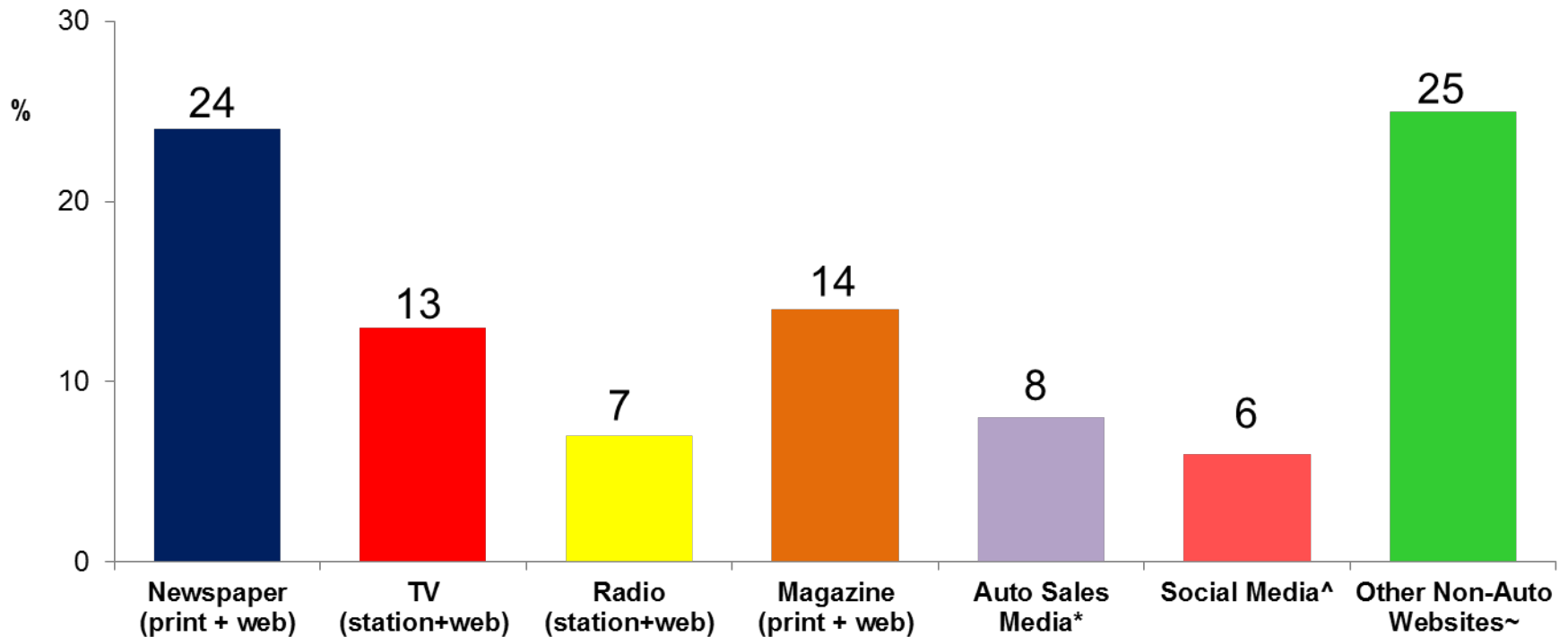
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NEWSPAPERS CANADA



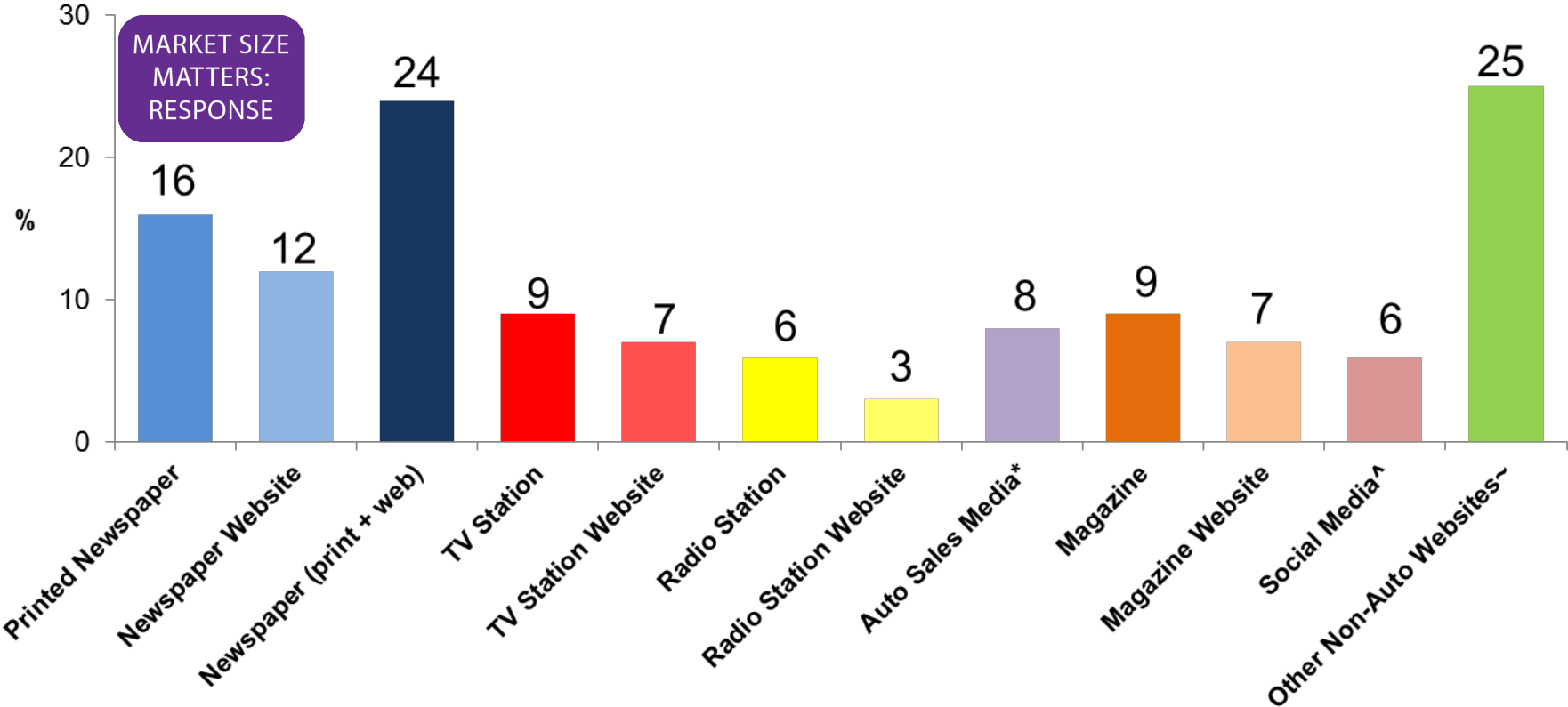
Media That Trigger Booking a Test Drive



- Newspapers (print + web) are one of the top triggers for booking a test drive.
- Print newspapers score almost twice as high as most other media.
- Newspaper websites also strong and are #3.



Media That Trigger Booking a Test Drive



- Newspapers (print + web) are one of top triggers for booking a test drive.
- Print newspapers stand out, scoring double that of most other media.

Totum Research: Canadian Adults 18+ bought a new vehicle in the past 2 years – November 2014

*Autotrader, Kijiji, etc. (print + web) ^Facebook, Twitter, Google+, etc. ~Websites excluding those listed and Auto Manufacturer, Model and Retailer sites





Media Triggering Visits to Websites: Summary

For all vehicle websites (manufacturer/brand/model/dealer):

- Newspaper (print + web) scores #1 for triggering visits!
- Print newspaper is the top medium for triggering visits!
- Newspaper websites outperform most media (top 5 of 11).
- About 20% state they ‘never visit’ each of these sites!

Vehicle manufacturer site: 60% visit in the early stage.

Vehicle brand/model site: Most visit in early/middle—split evenly.

Vehicle dealer website: Many visit in the last stage.

Newspaper media are strong throughout, particularly in the early stage, for driving manufacturer and brand/model visits!

Newspaper media trigger in-person visits:

	Newspaper Media	Newspaper Print	Newspaper Website
Vehicle Dealership	#1 (by far)	#1	#3
Test Drive	Tied #1	#2	#3

COMMUNITY
RESILIENCE

MARKET SIZE
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NEWSPAPERS CANADA



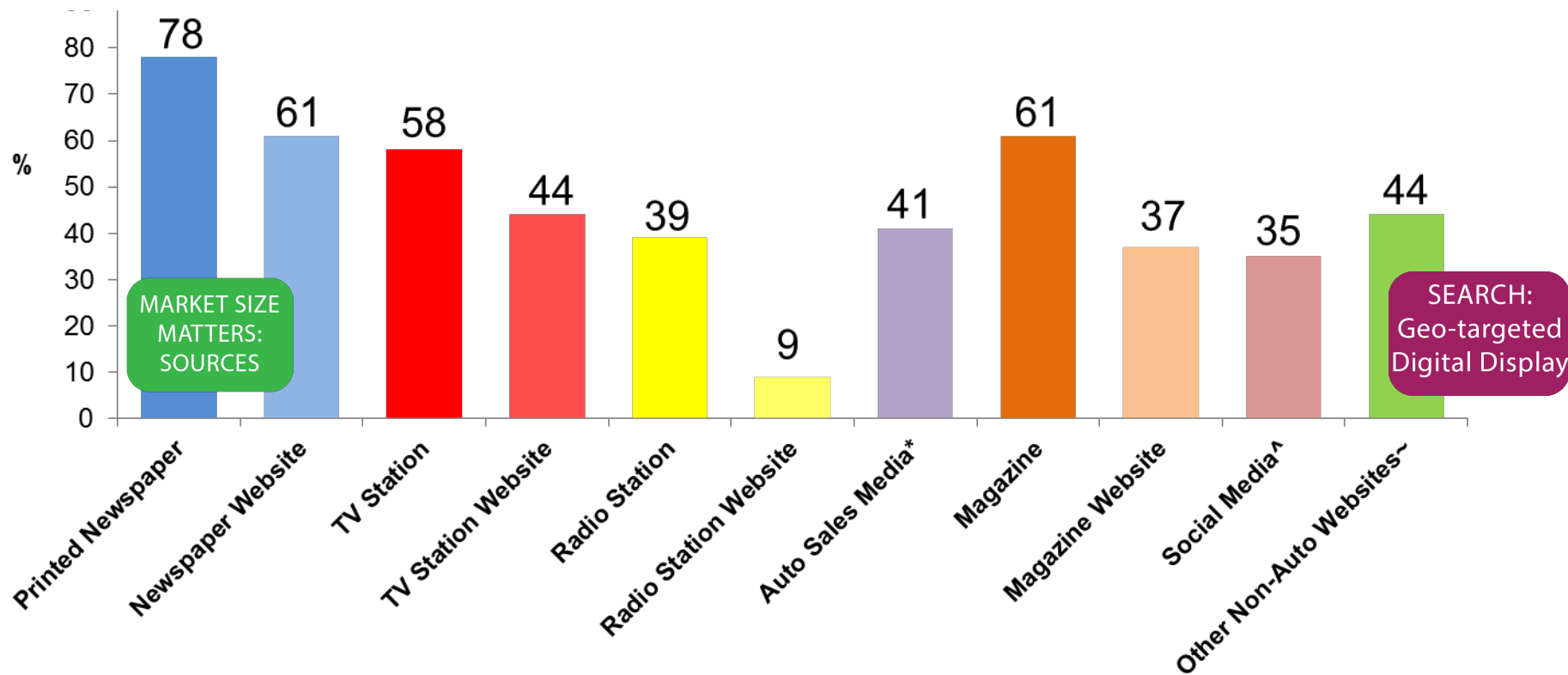
What Each Medium Is Used For

Asked of each medium, so a combined print + web score is not possible.





Media Considered Good for General Information About Vehicles



Print newspapers provide both depth and visuals, explaining why consumers indicate they are an outstanding source for general information on vehicles. Newspaper sites score well for the same reason.

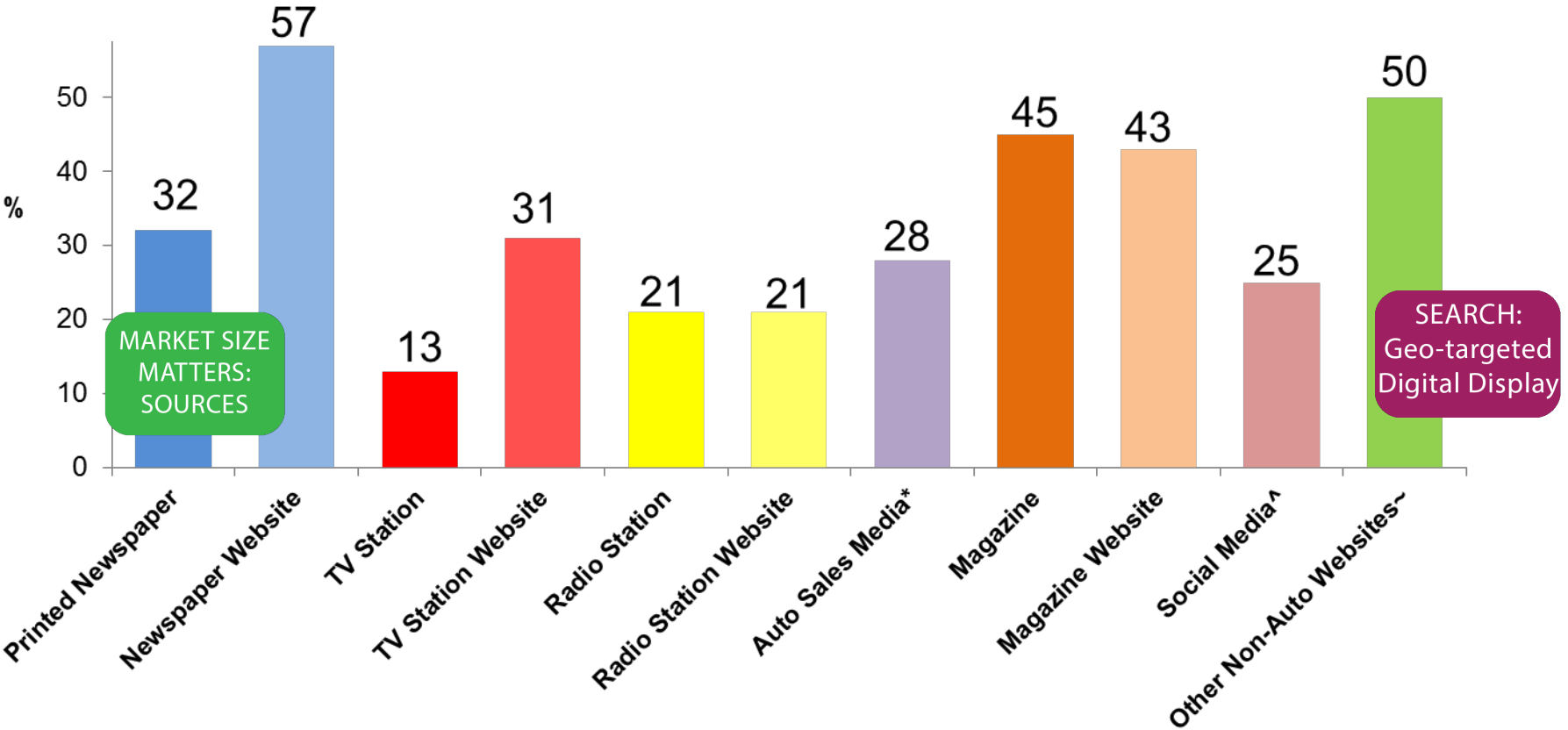
Totum Research: Canadians 18+ bought a new vehicle in the past 2 years who are influenced by each medium at some stage in the vehicle buying process – November 2014

**Autotrader, Kijiji, etc. (print + web) ^Facebook, Twitter, Google+, etc. ~Websites excluding those listed and Auto Manufacturer, Model and Retailer sites





Media Considered Good for Specific Information About Vehicles



Newspaper websites are strongest vs. all other options for specific information as its click-through nature allows for depth.

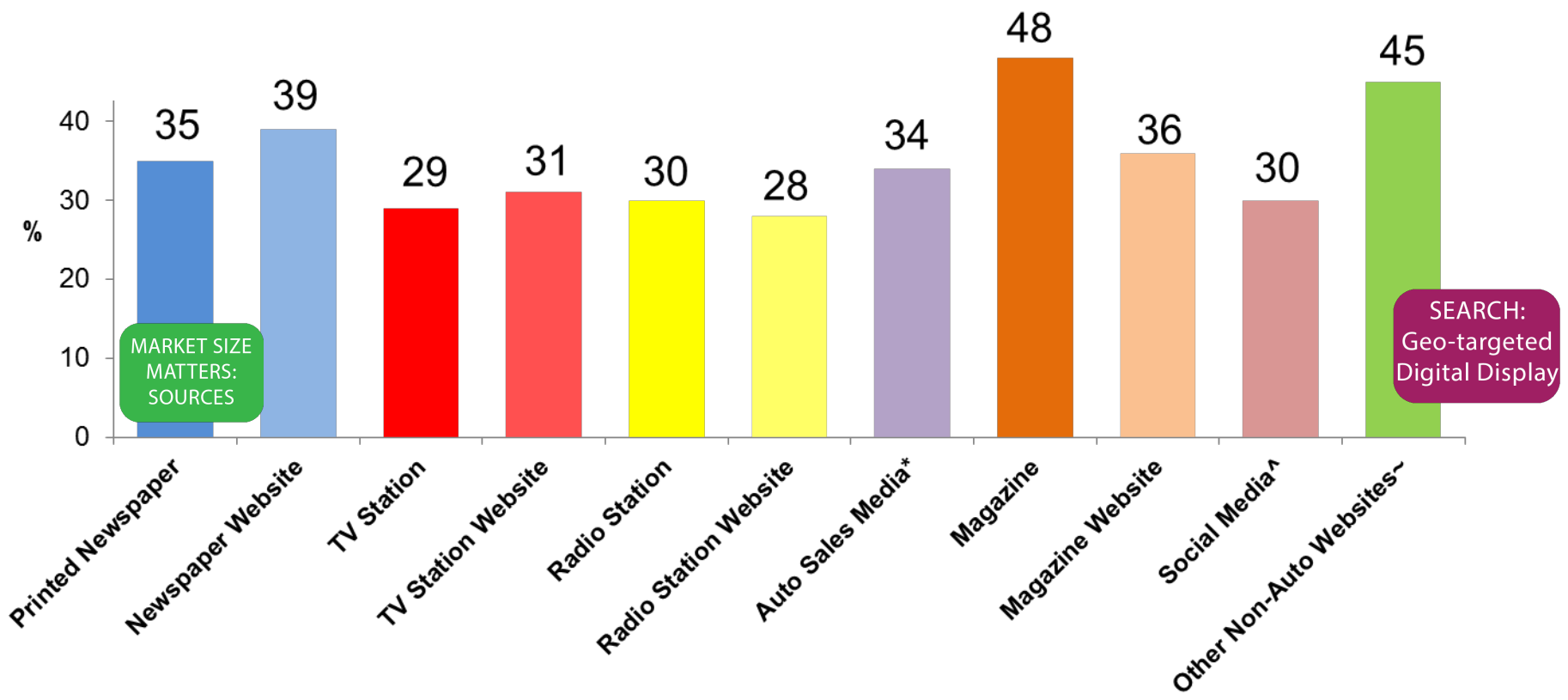
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Media Considered Useful When Deciding on a Make of Vehicle



MARKET SIZE MATTERS: SOURCES

SEARCH: Geo-targeted Digital Display

Newspaper websites score above average in terms of helping decide on the make of vehicle. These sites have useful data, ads and tools to guide the decision.

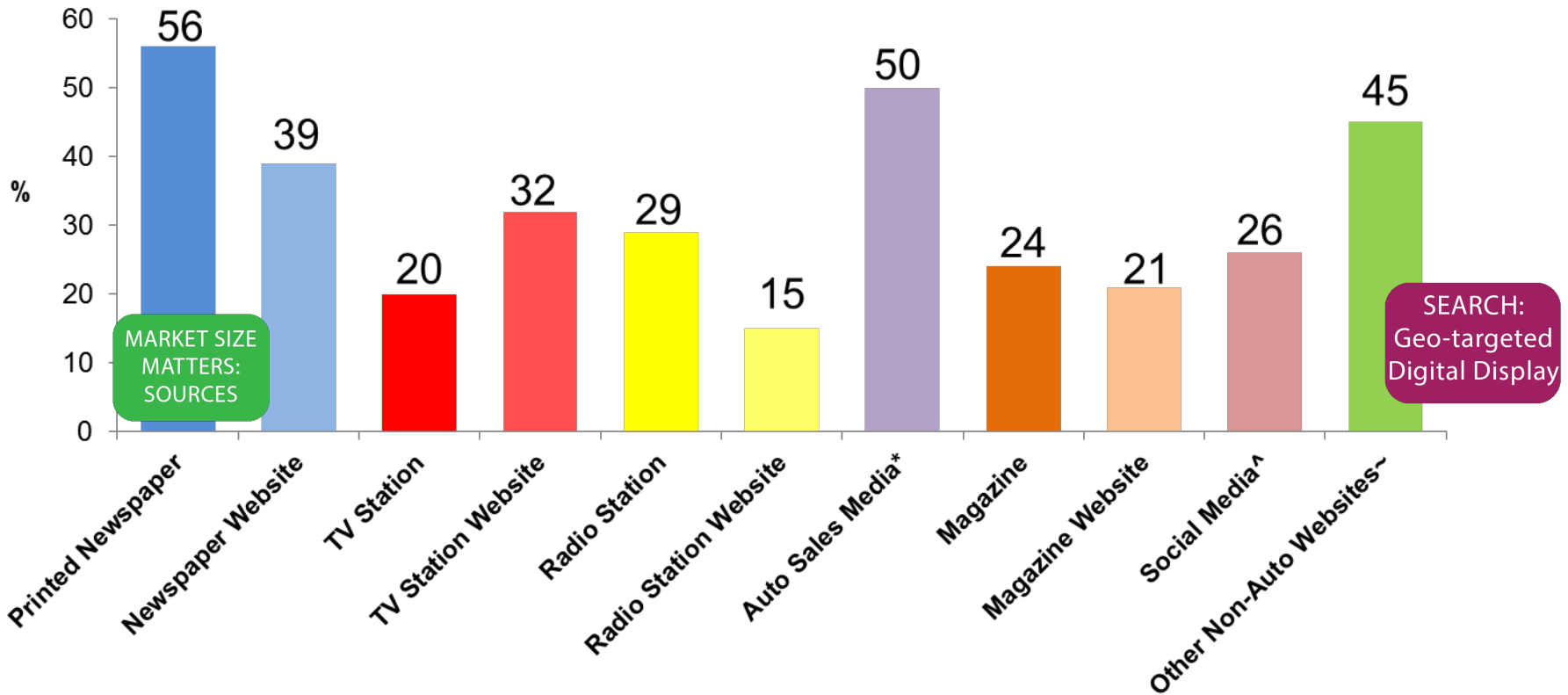
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Media Considered Useful For Comparing Prices of Vehicles



Print newspapers are known for vehicle pricing ads and, as such, are ranked the highest of all media.

Totum Research: Canadian Adults 18+ bought a new vehicle in the past 2 years who are influenced by each medium at some stage in the vehicle buying process – November 2014

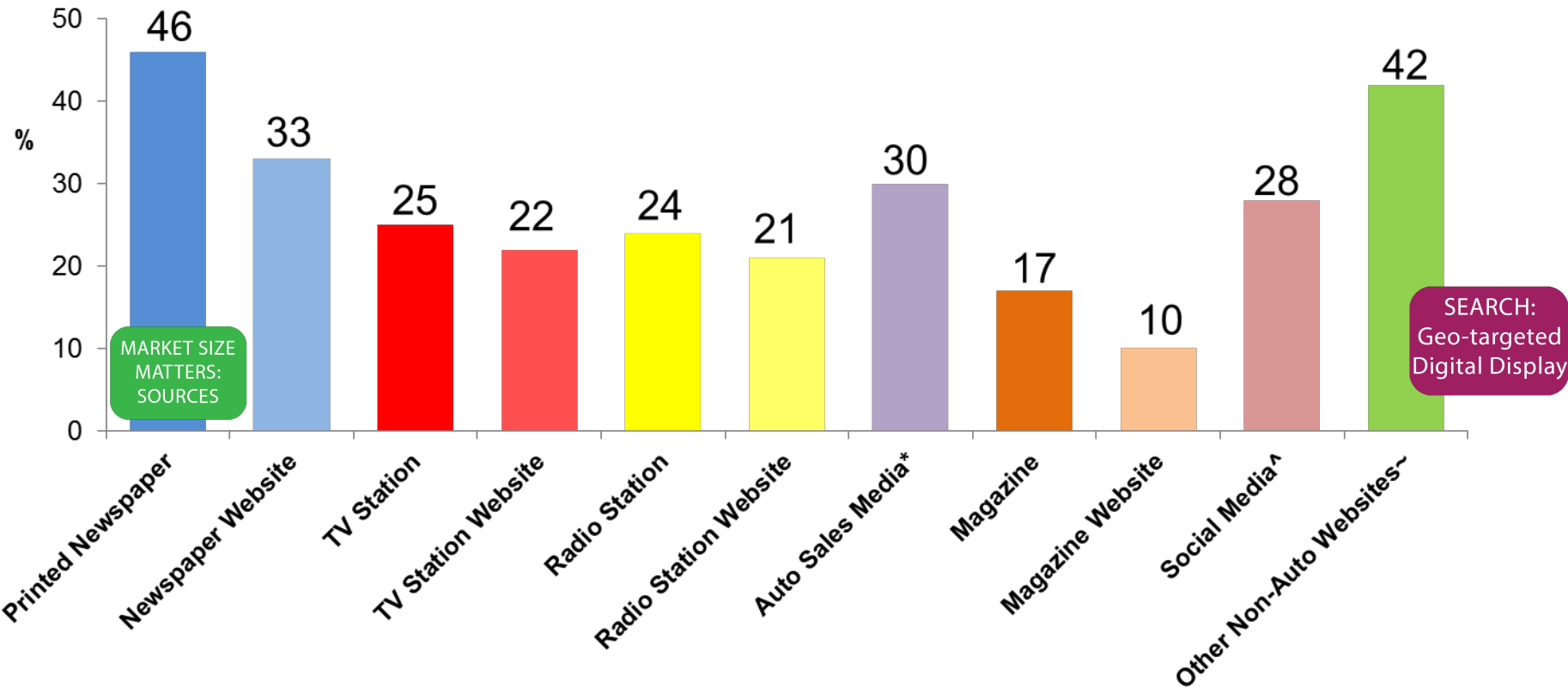
**Autotrader, Kijiji, etc. (print + web) ^Facebook, Twitter, Google+, etc. ~Websites excluding those listed and Auto Manufacturer, Model and Retailer sites



NEWSPAPERS CANADA



Media Considered Helpful in Deciding Where to Buy or Lease From



Print newspapers help decide where to buy/lease – the #1 choice!
 Newspaper websites come in a solid #3! This may be due to the fact that newspapers are considered the most trustworthy source for ads.

Totum Research: Canadian Adults 18+ bought a new vehicle in the past 2 years who are influenced by each medium at some stage in the vehicle buying process – November 2014

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What Each Medium is Used for Summary

Print newspapers are the #1 medium for:

- Providing general information
- Comparing prices
- Deciding where to buy or lease from

MARKET SIZE
MATTERS:
SOURCES

Newspaper websites are the #1 medium for:

- Source for specific information on vehicles

SEARCH:
Geo-targeted
Digital Display

Newspapers are useful in deciding make of vehicle:

- Newspapers scored above average:
print (#5 of 11) and websites (#3)





Vehicle Ads





Print Newspapers & Vehicle Ads

Vehicle Ads:

90% indicated that their **print newspaper** contains **vehicle ads.**

Read Vehicle Ads:

83% said they **read or looked** at the **vehicle ads** in their **newspaper!**

COMMUNITY
RESILIENCE

MARKET SIZE
MATTERS:
SOURCES

MARKET SIZE
MATTERS:
RESPONSE





Newspaper Websites & Vehicle Ads

Vehicle Ads:

63% indicated that the **newspaper website** contains **vehicle ads**.

Read Vehicle Ads:

51% said they **read or looked** at the **vehicle ads** on the **newspaper website**.

SEARCH:
Geo-targeted
Digital Display





Non-Auto Websites & Vehicle Ads

Vehicle Ads:

46% indicated that the **non-auto website*** contains **vehicle ads.**

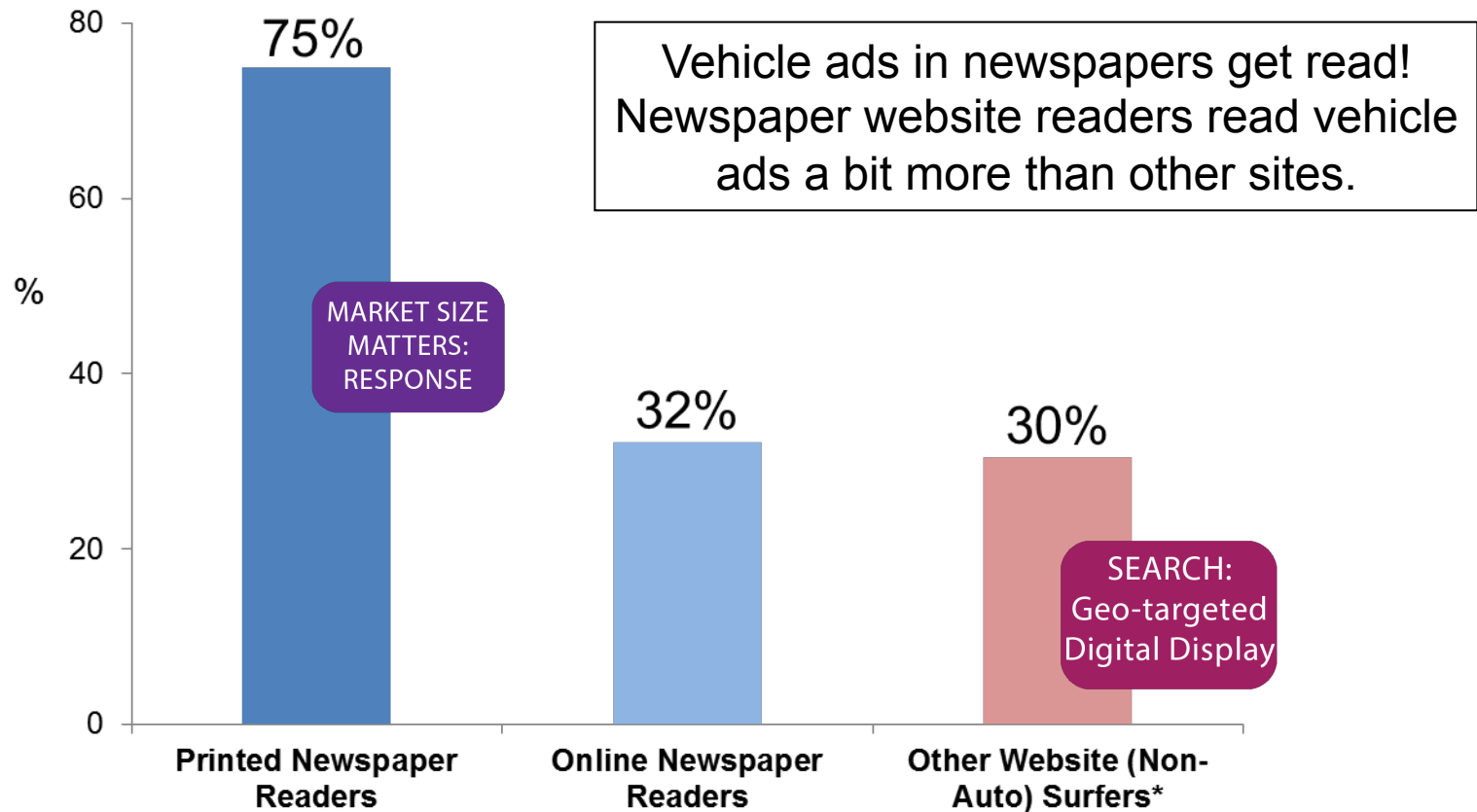
Read Vehicle Ads:

SEARCH:
Geo-targeted
Digital Display

66% said they **read or looked** at the **vehicle ads** on the **non-auto website.**

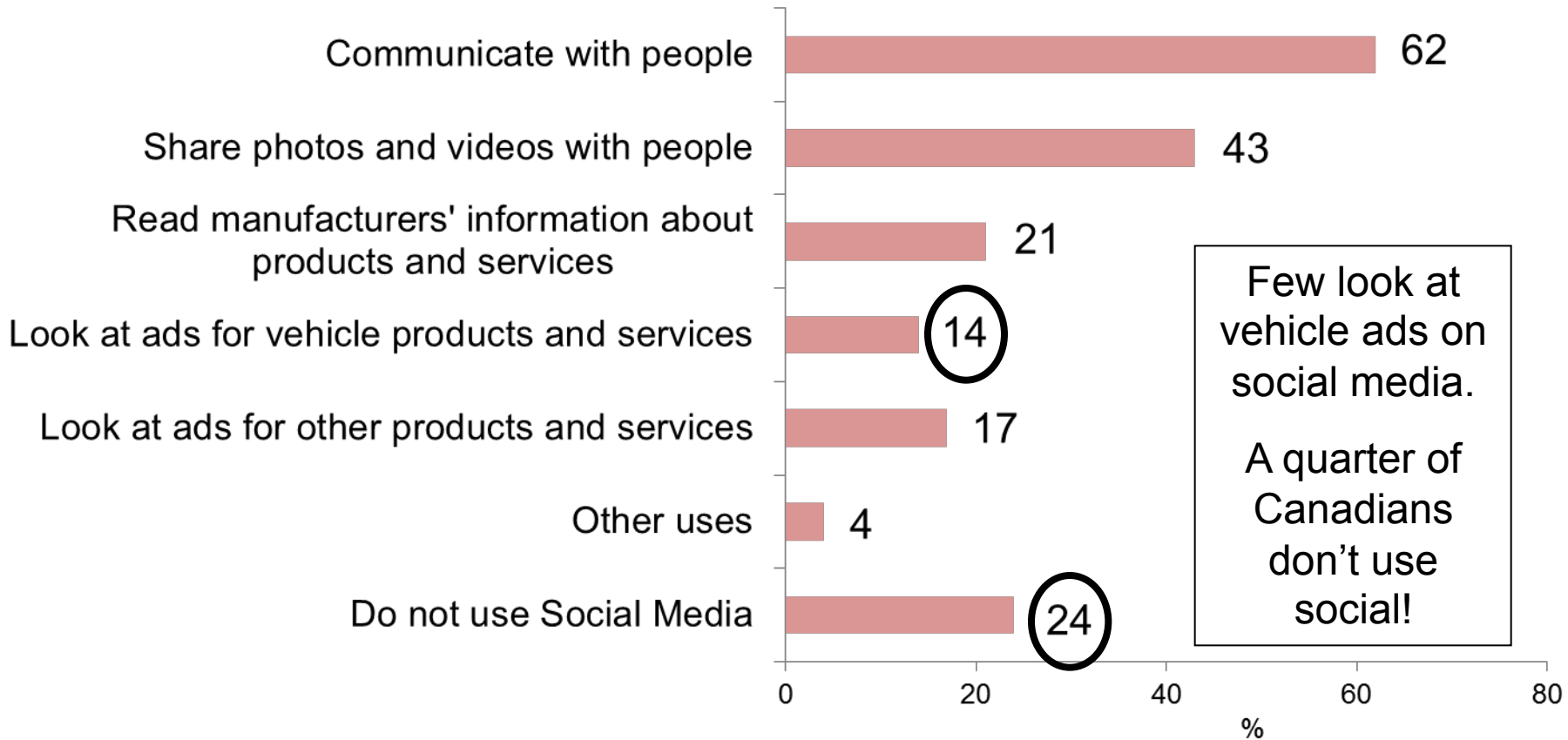


Net Vehicle Ads Read by Media





Ways in Which Social Media (e.g. Facebook, Twitter, etc.) Are Used





Vehicle Ads

- Print newspapers get read (75%)
- Newspaper websites are read a bit more than other non-auto websites
- Social Media
 - Not effective for vehicle ads as very few (14%) look at them
 - Don't look at other ads either (only 17%)
 - A large percentage (24%) don't use this medium at all

COMMUNITY
RESILIENCE

SEARCH:
Geo-targeted
Digital Display





NADbank, ComBase: Adults 18+, print and online



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