

Totum *Research Inc*

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

MANITOBA/SASKATCHEWAN

Measured Communities:

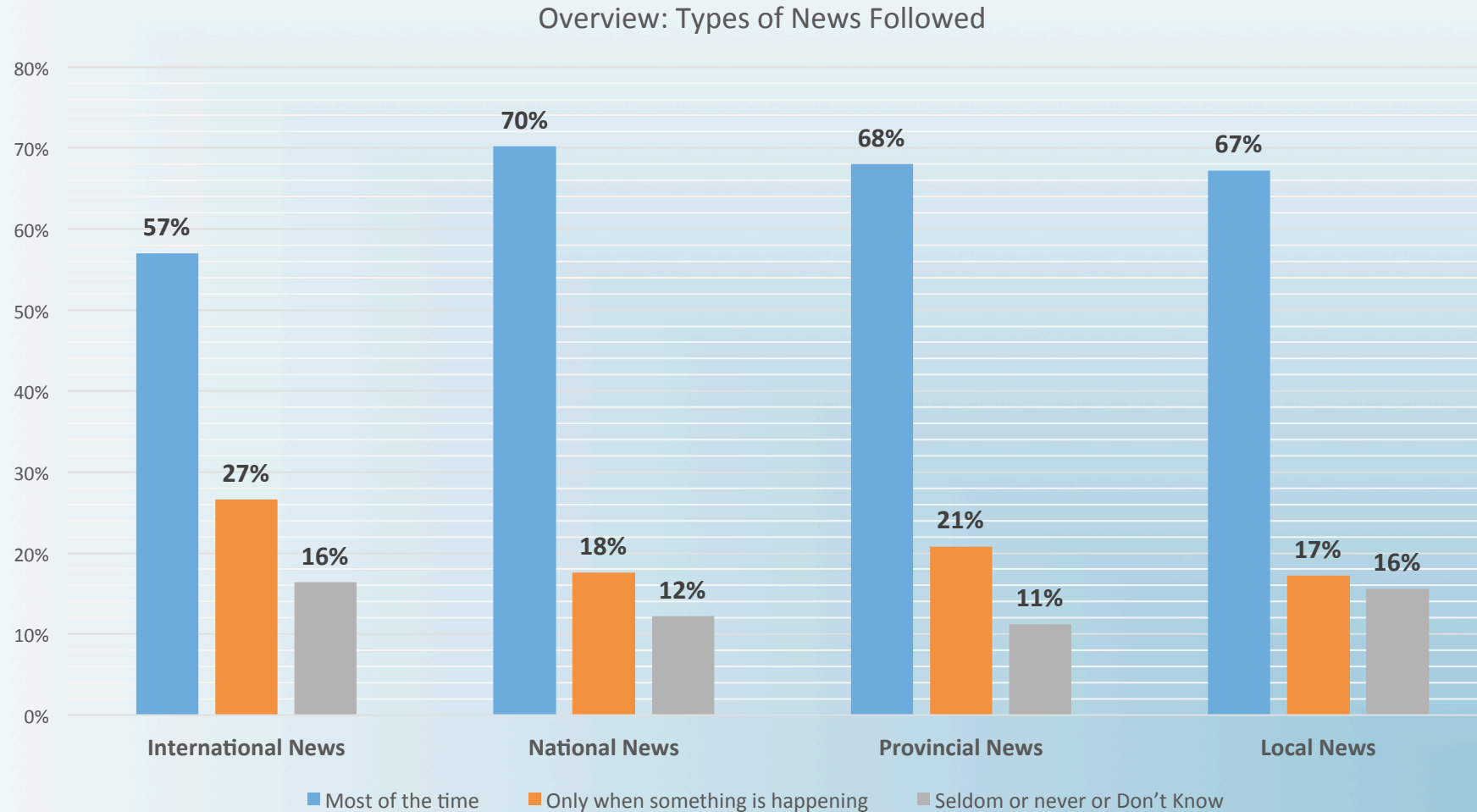
- 1) Farms
- 2) Farms/Hamlets: <1,000 Population
- 3) Villages/Towns: 1,000-10,000 Population
- 4) Cities: 10,000-100,000 Population
- 5) Overall: Communities <100,000 Population

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



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People Continue to Follow All Types of News



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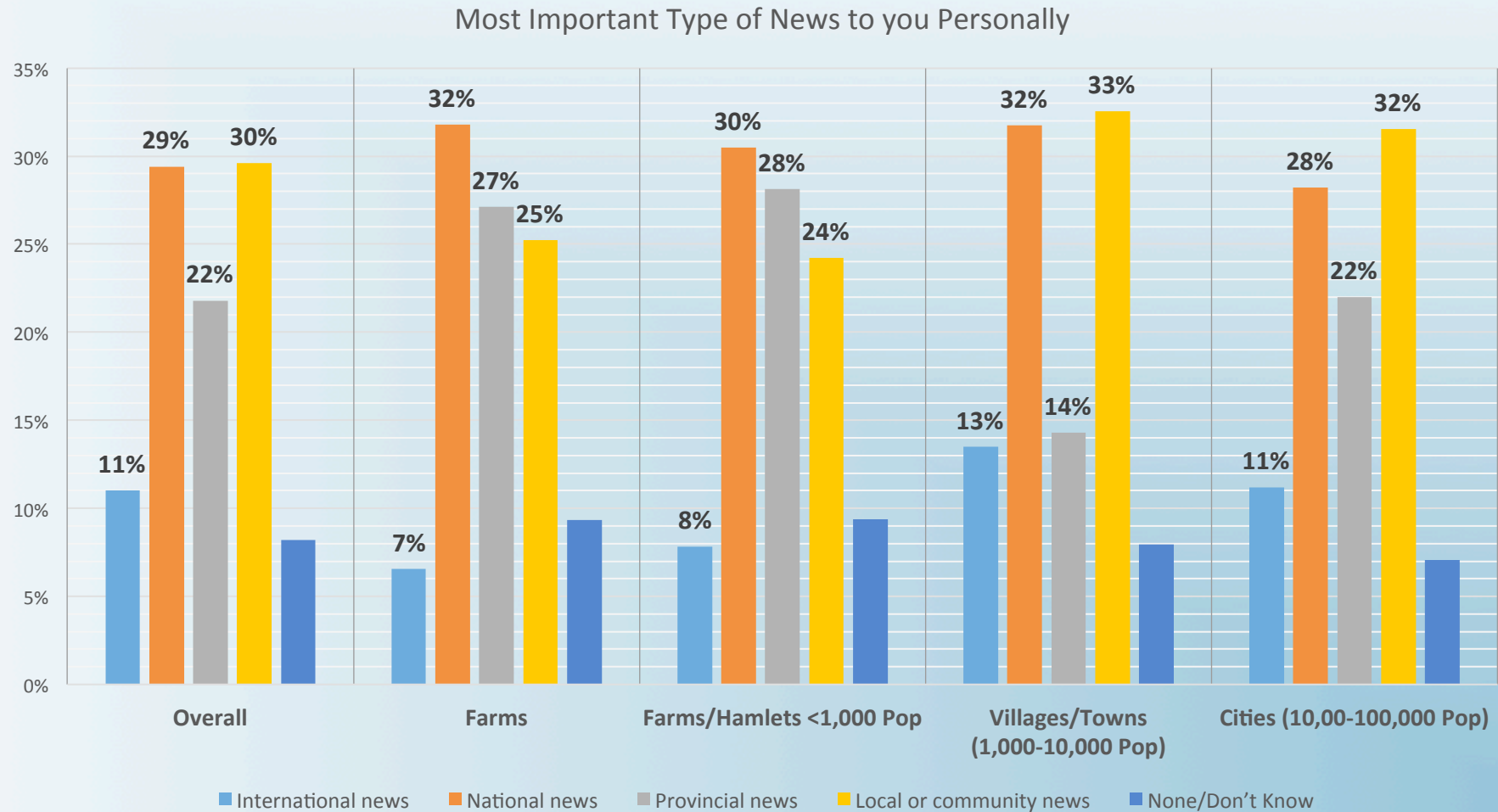
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Manitoba & Saskatchewan: Communities Under 100,000 Population

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



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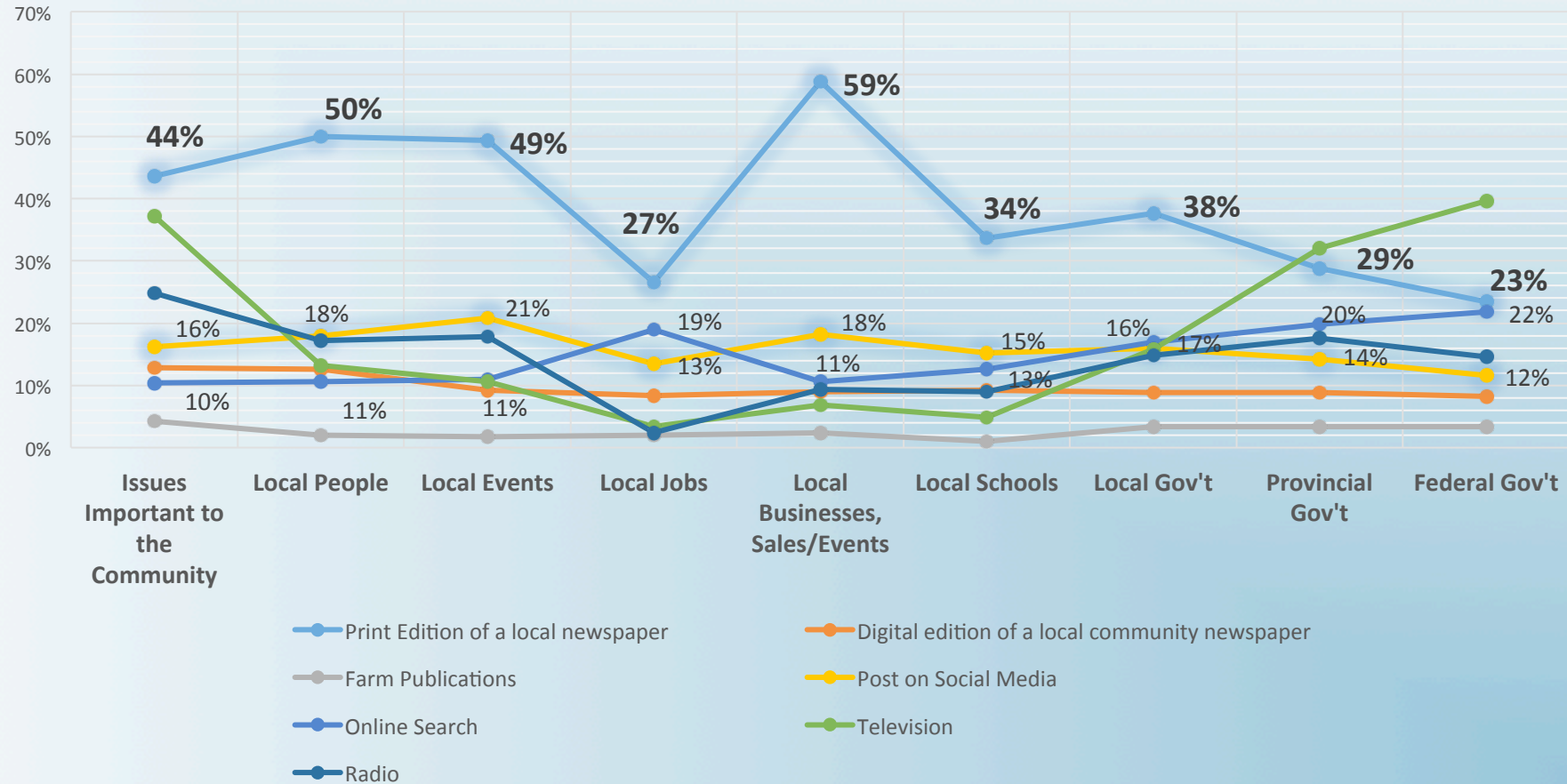


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Manitoba & Saskatchewan: Communities Under 100,000 Population

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

Preferred Media to Receive Information About Local Topics



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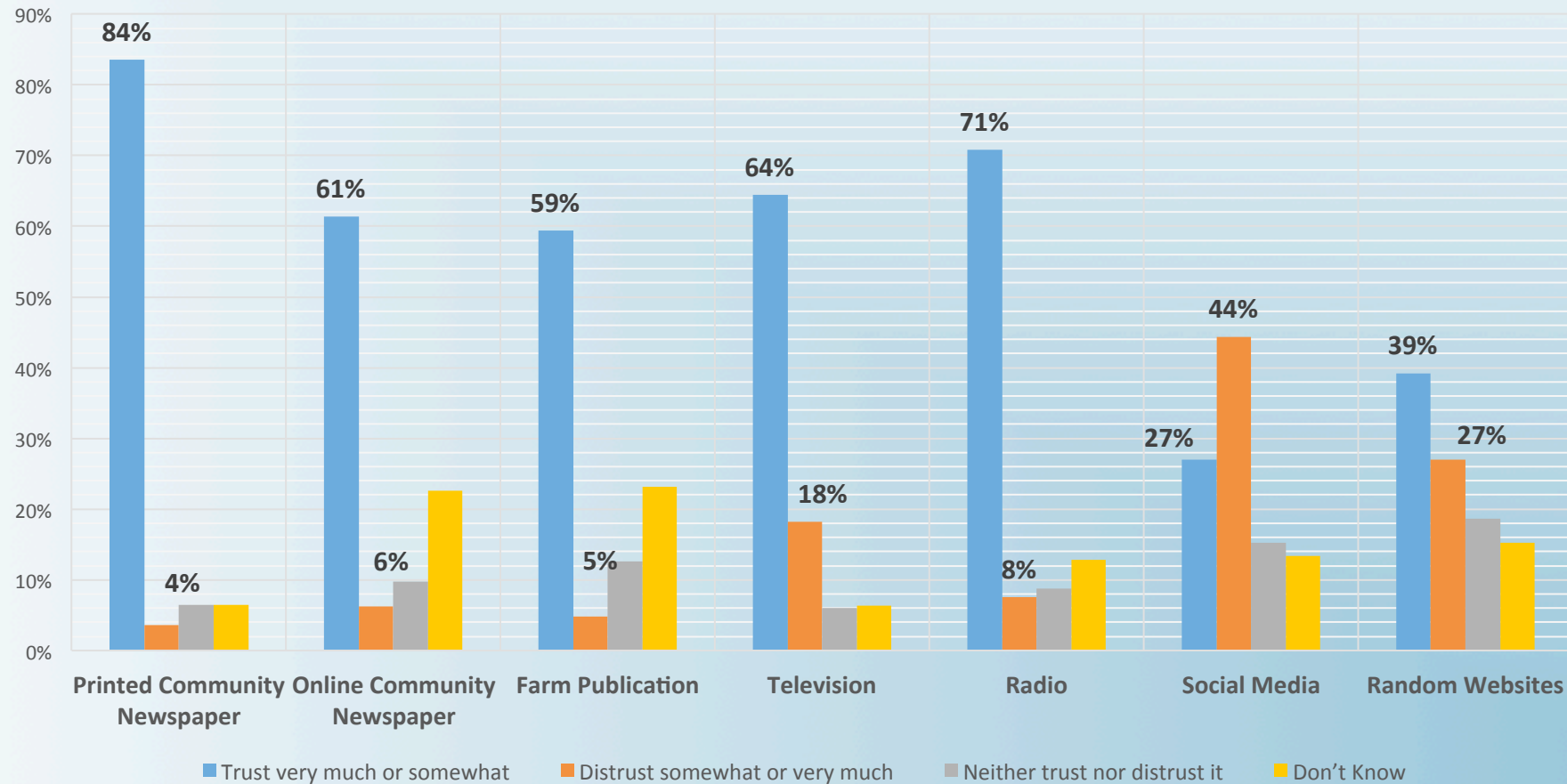
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Printed Community Newspapers Are The Most Trusted Platform for News/Ad Content, Online/Social Media, The Least Trusted

Trust in News and Advertising Content by Platform



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Manitoba & Saskatchewan: Communities Under 100,000 Population

70% of Households in Communities Under 100,000 Population Report Receiving a Printed Community Newspaper Each Week

Received a Community Newspaper at Home in the Last 7 Days



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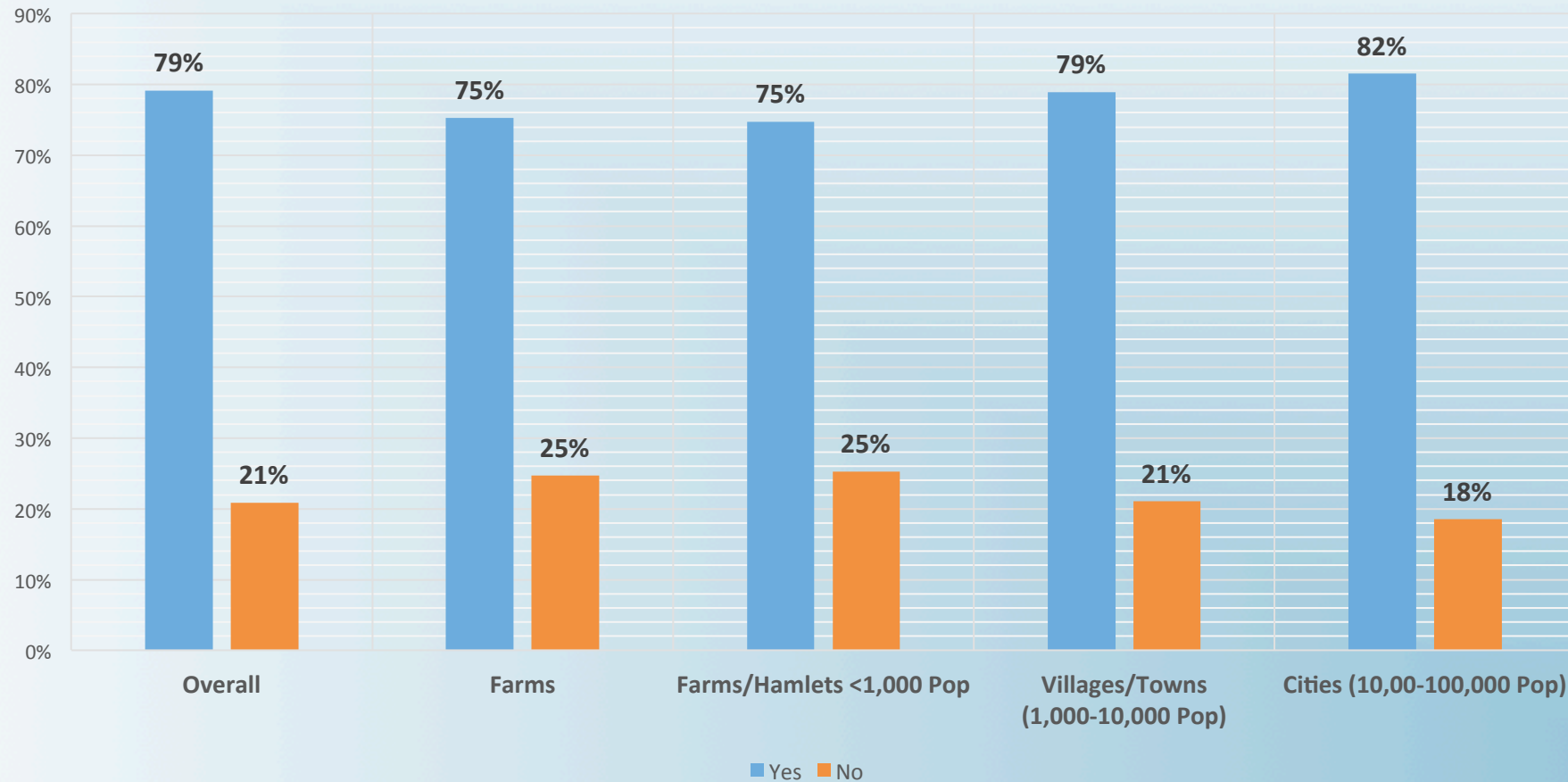


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Manitoba & Saskatchewan: Communities Under 100,000 Population

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

Read or Looked Into a Printed Community Newspaper in the Last 7 Days



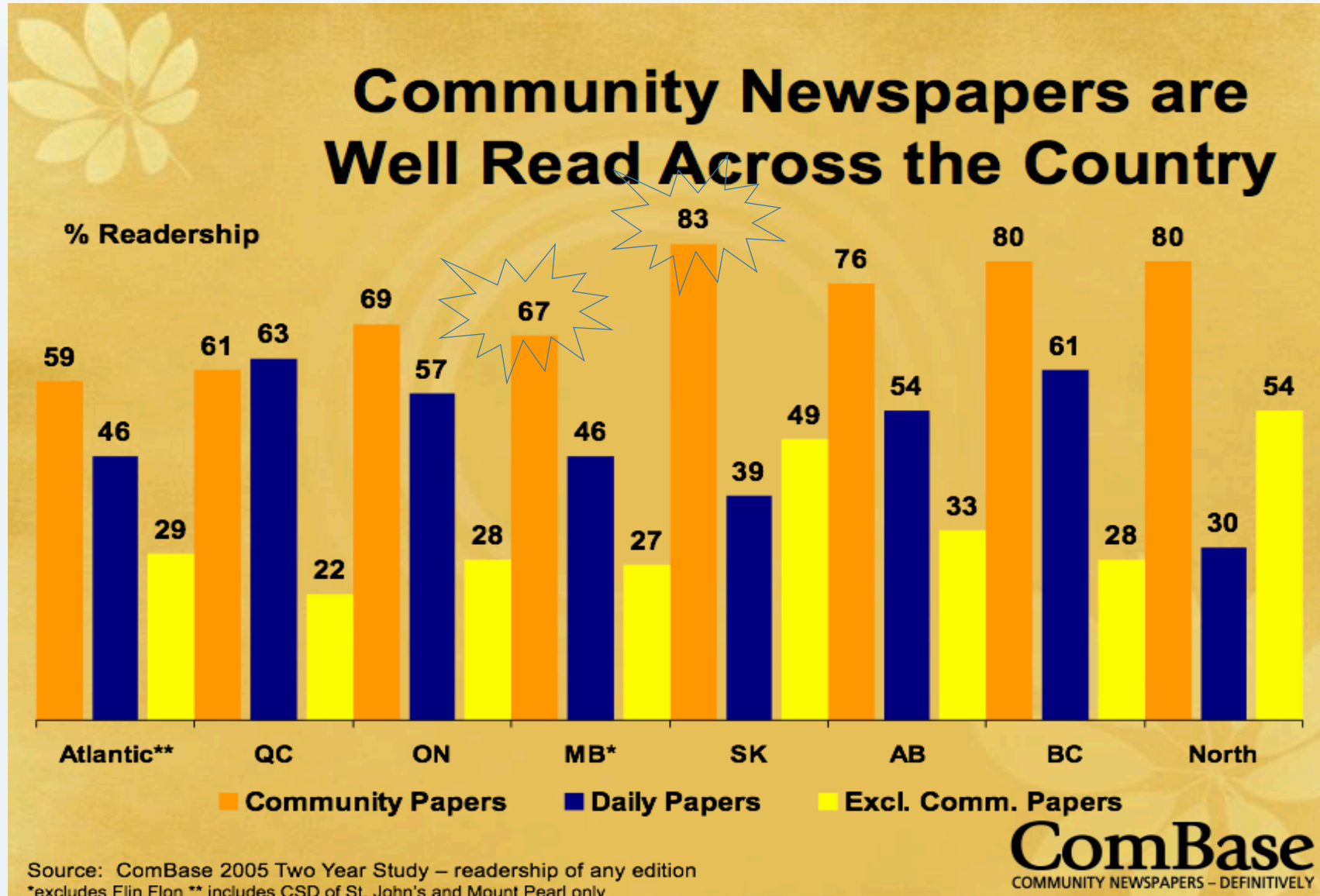
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Community Newspaper Readership c2005



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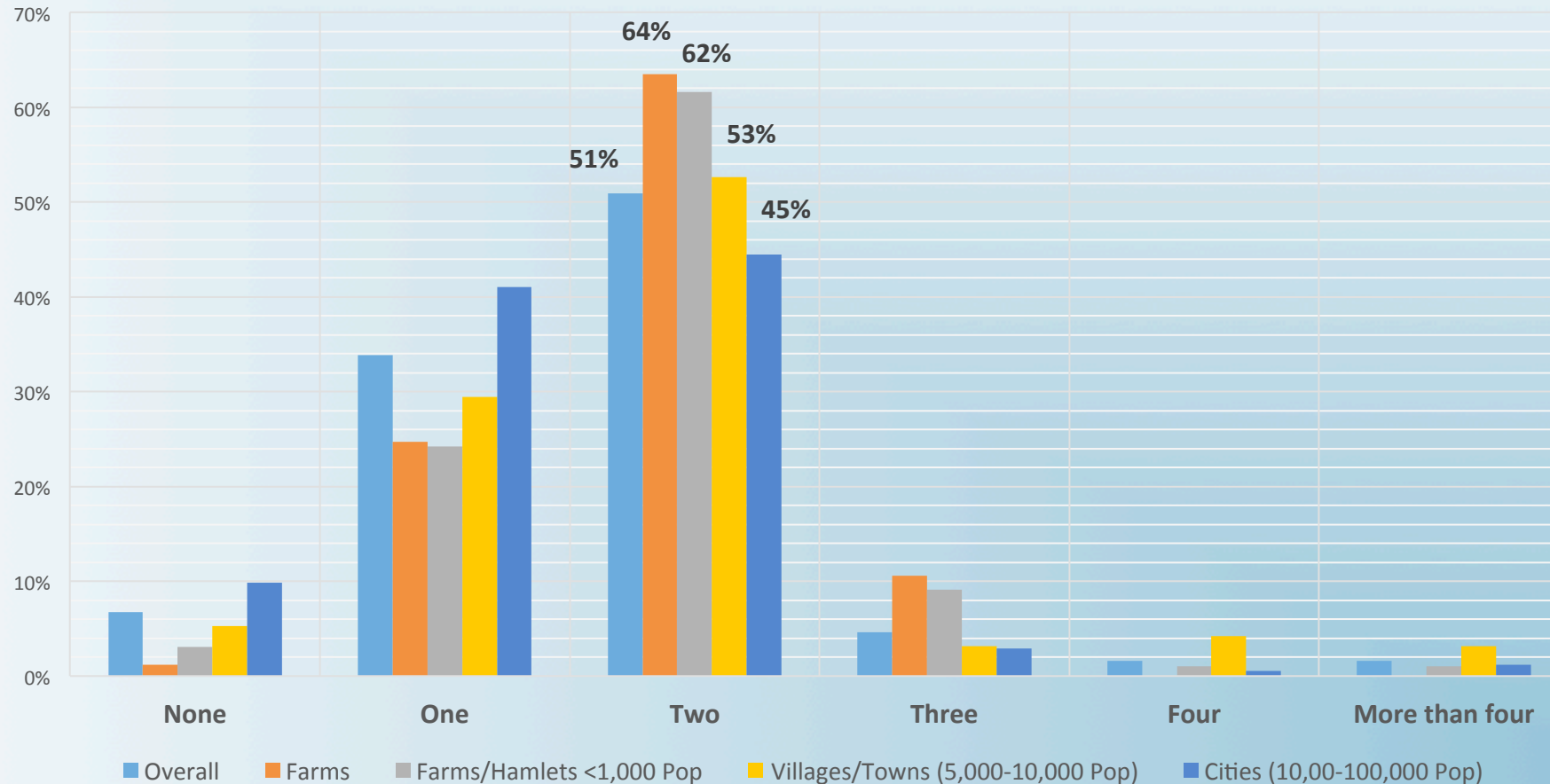


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Manitoba & Saskatchewan: Communities Under 100,000 Population

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

Readers Per Copy in a Typical Week



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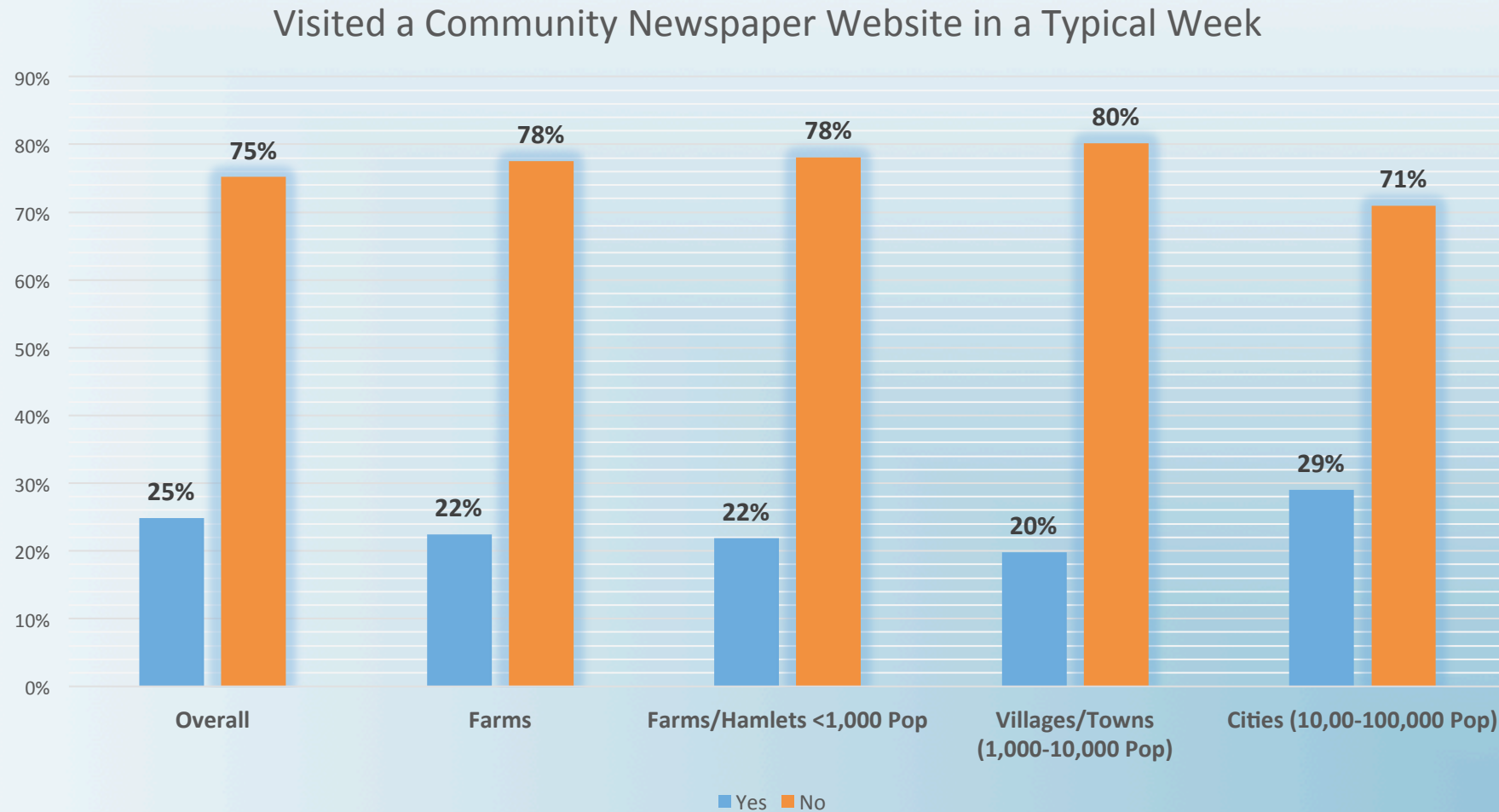
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Three Quarters of Respondents Indicated They **HAVE NOT** visited the website of a local community newspaper in the Last 7 Days



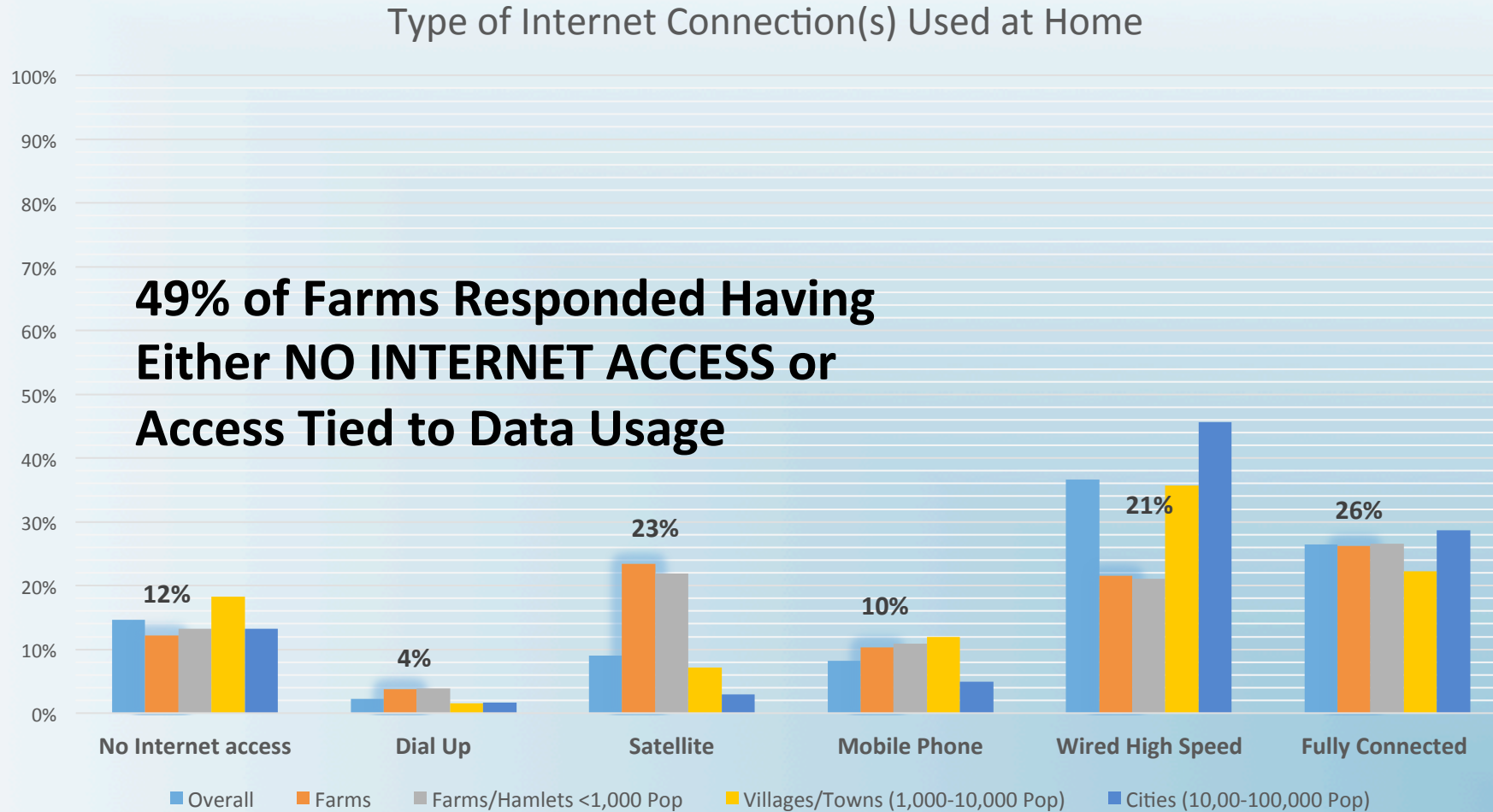
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Respondents Access the Internet in a Variety of Ways in Rural and Remote Communities



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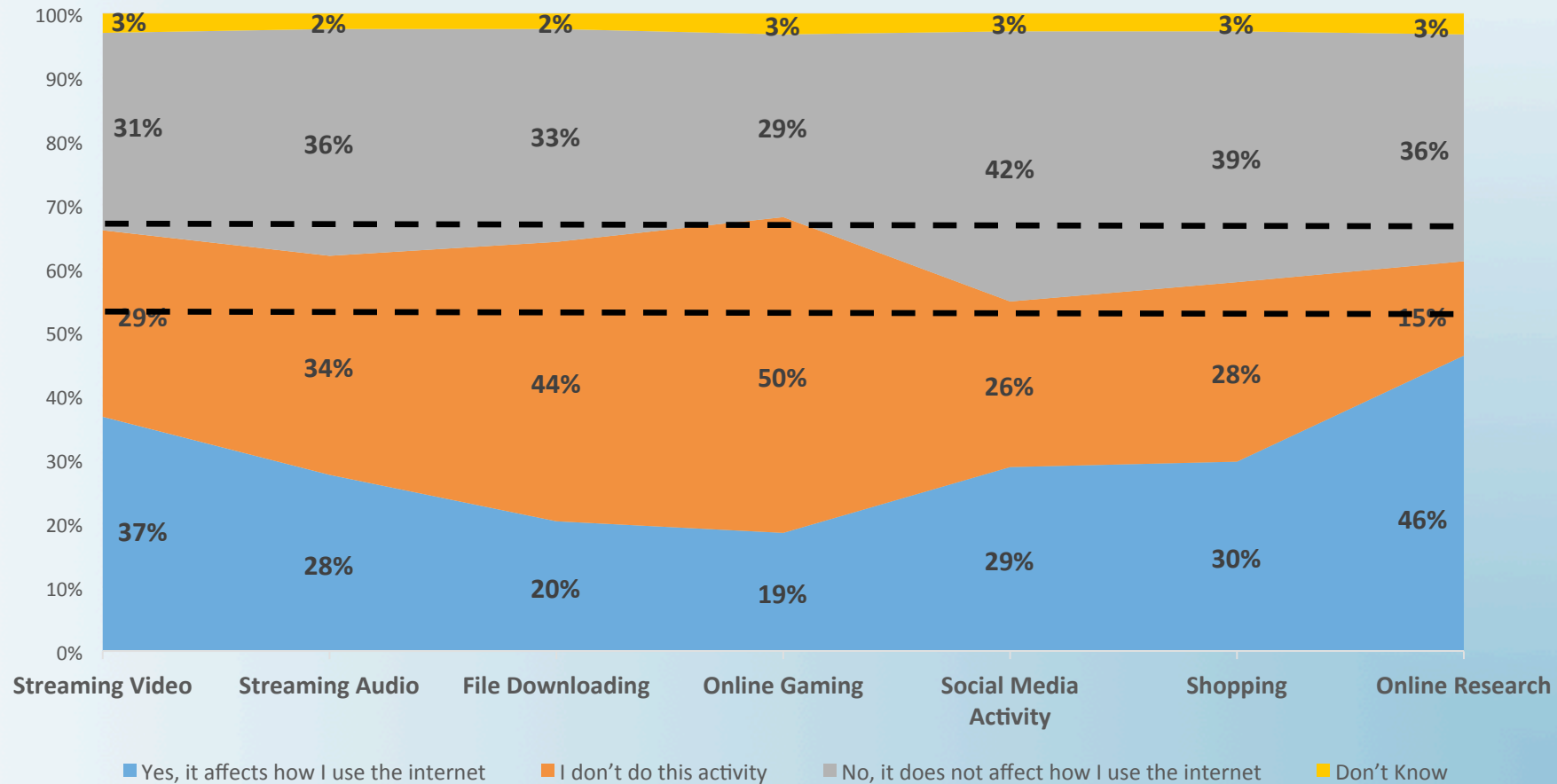
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Manitoba & Saskatchewan: Communities Under 100,000 Population

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

Does Your Internet Connection at Home Affect Your Online Activities



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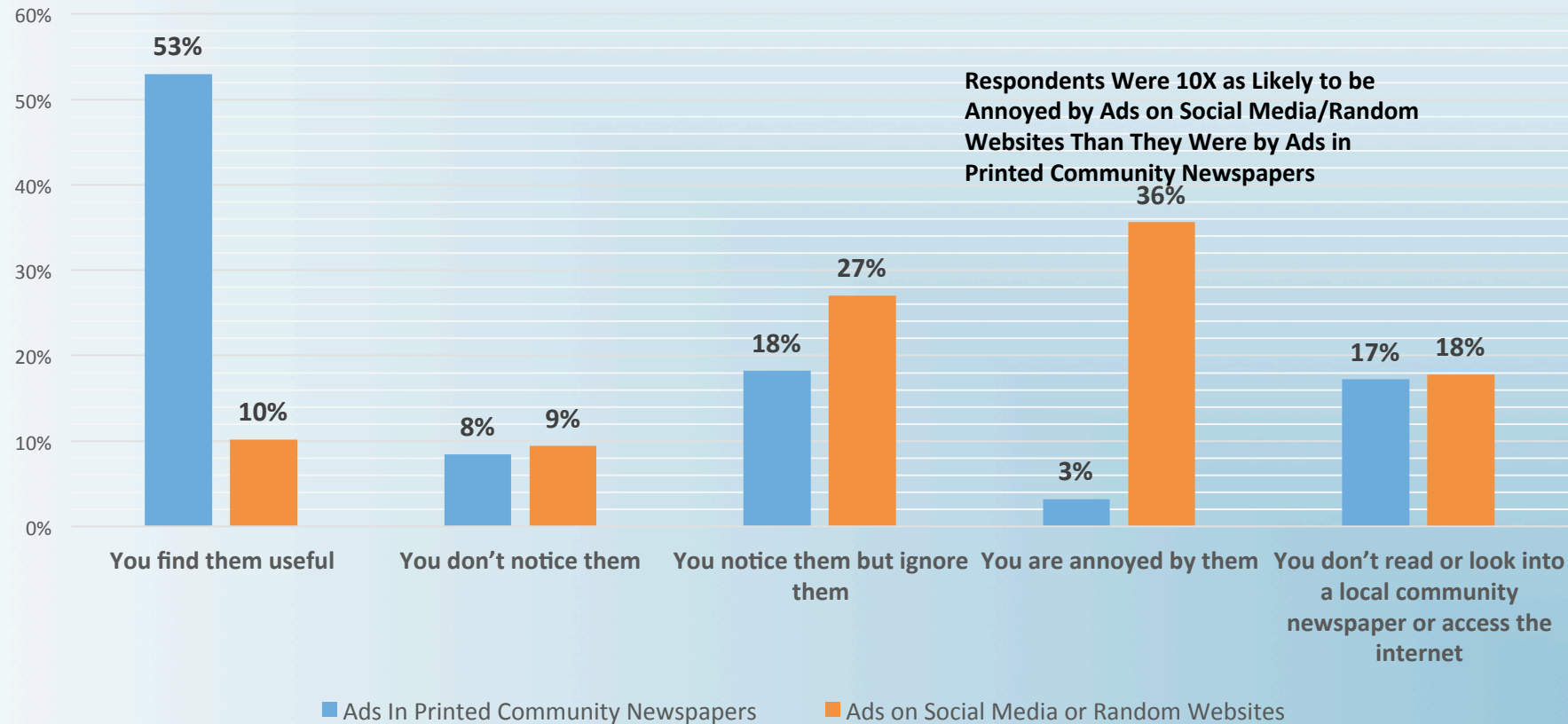


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Manitoba & Saskatchewan: Communities Under 100,000 Population

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

Feelings About Ads in Printed Community Newspapers and Social Media/ Random Websites



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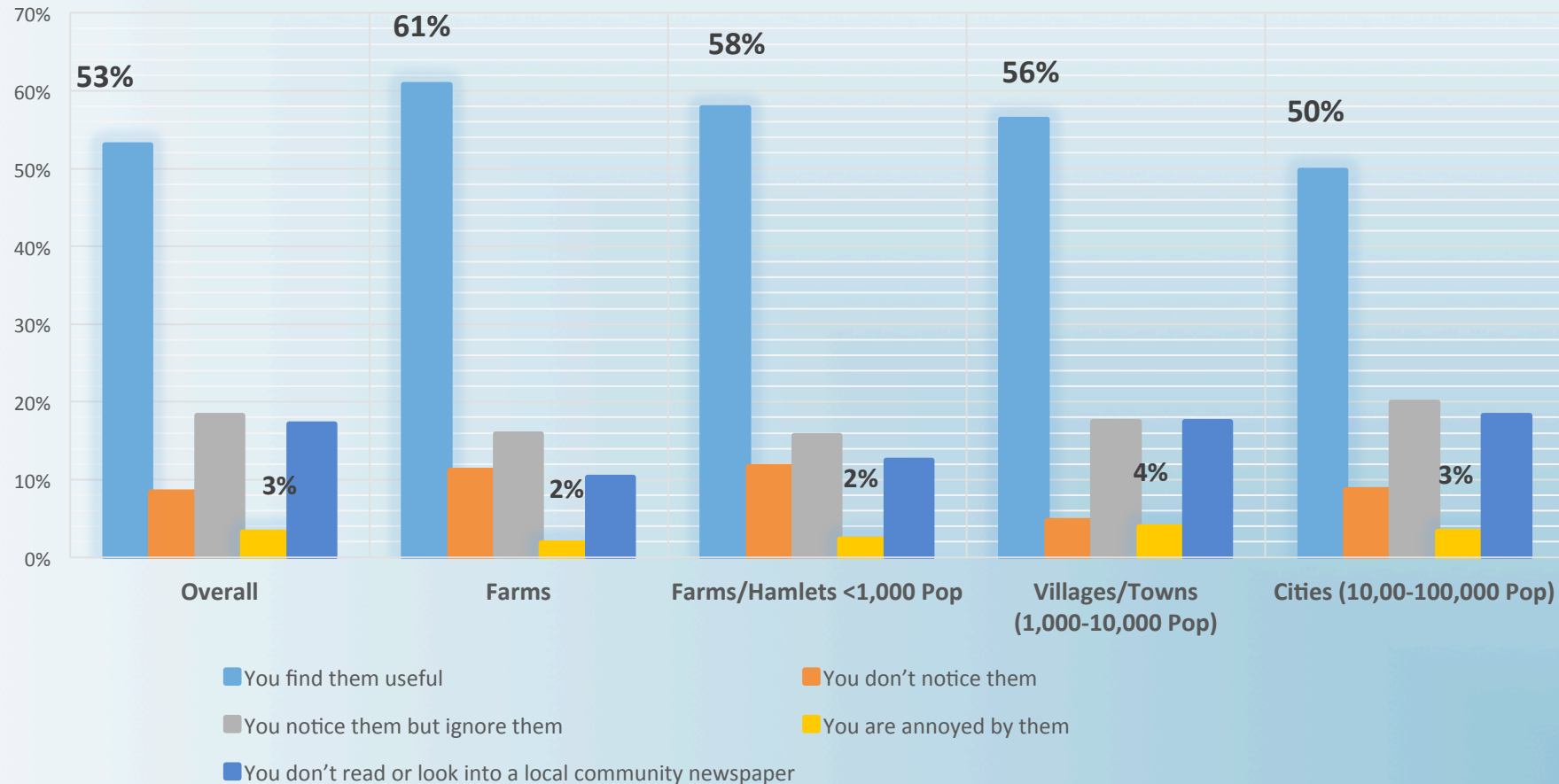


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Manitoba & Saskatchewan: Communities Under 100,000 Population

Across All Community Size Categories the Majority 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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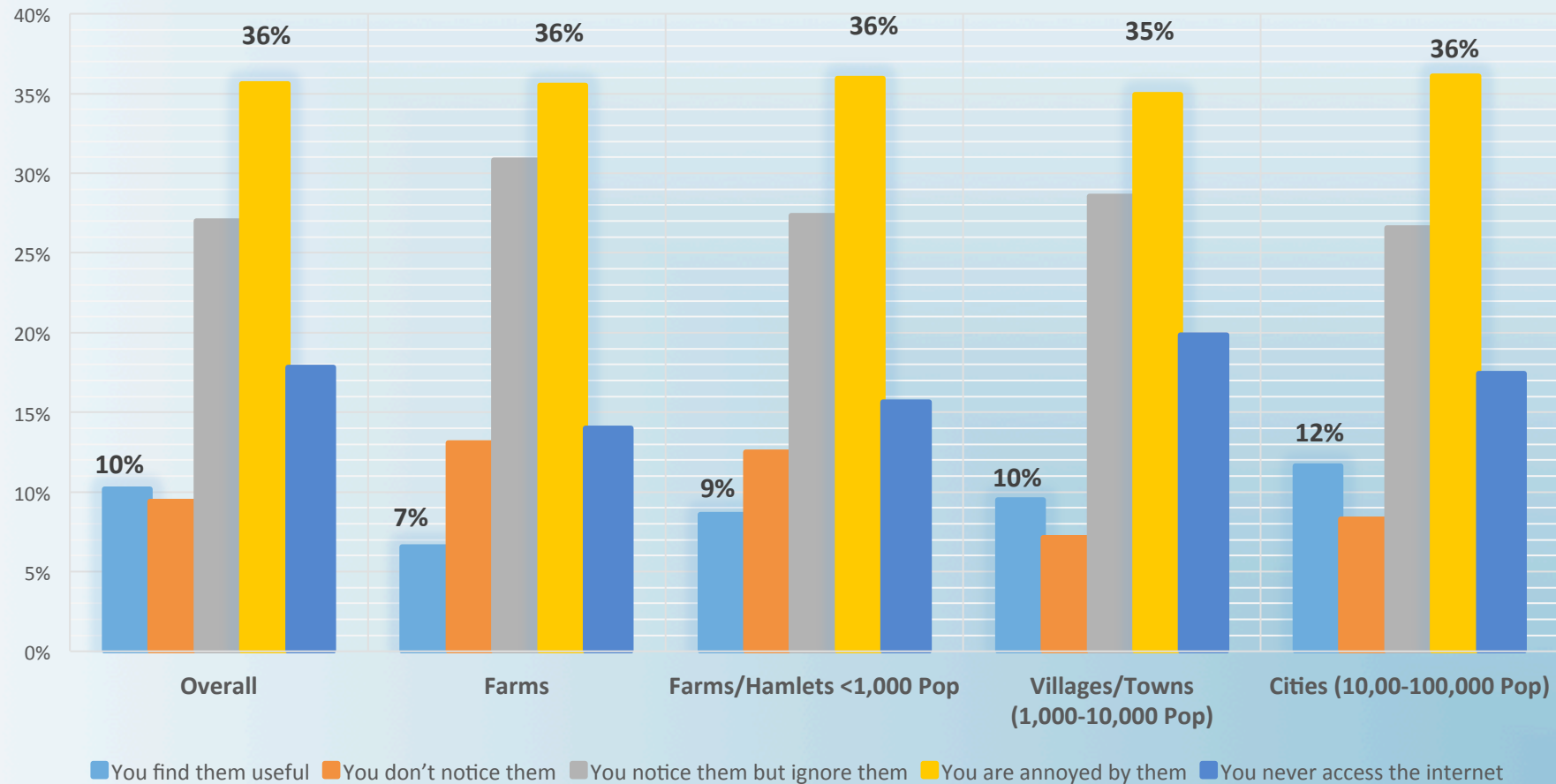


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Manitoba & Saskatchewan: Communities Under 100,000 Population

Social Media/Online Ads Were Found to be Annoying by Over One of Three 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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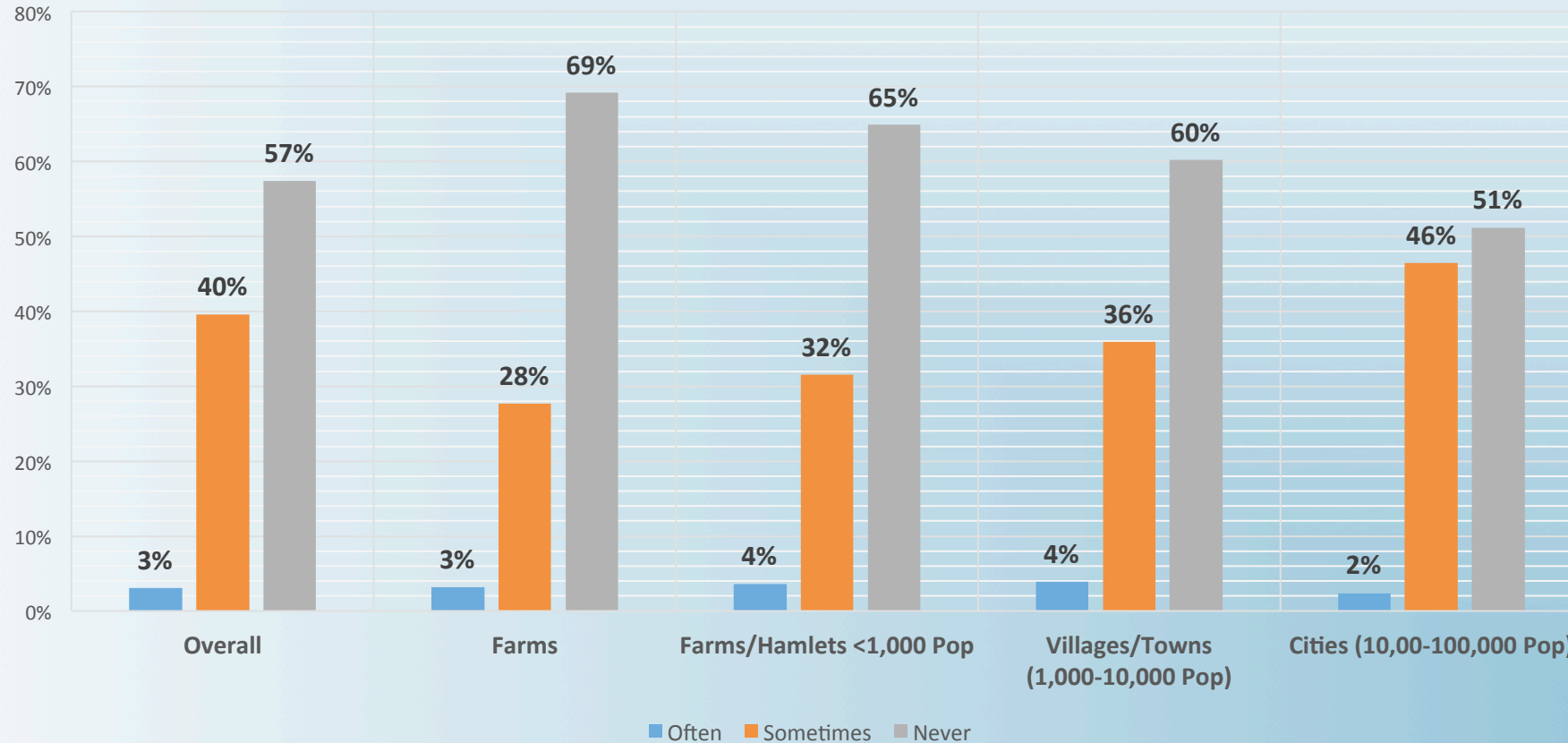


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Manitoba & Saskatchewan: Communities Under 100,000 Population

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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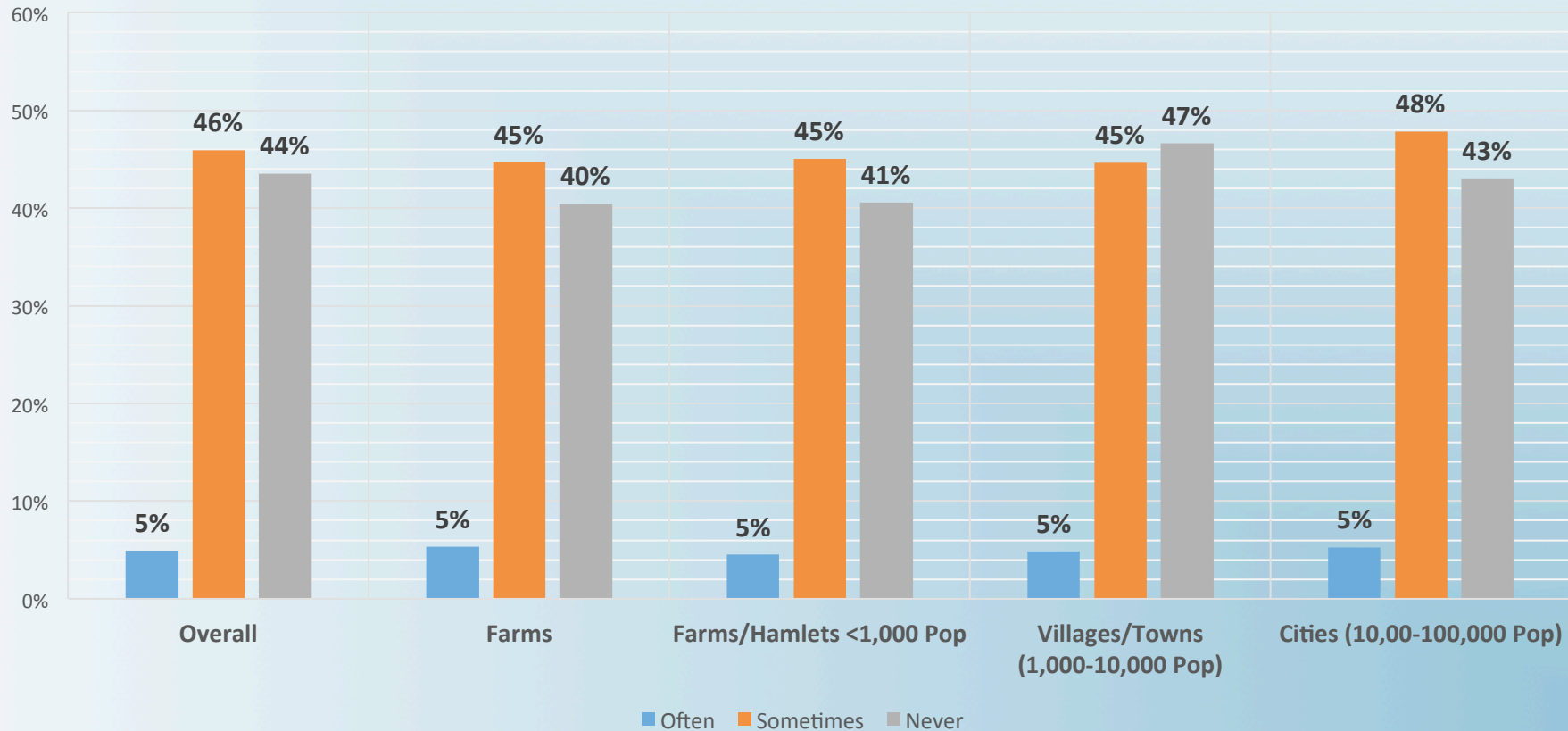


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Manitoba & Saskatchewan: Communities Under 100,000 Population

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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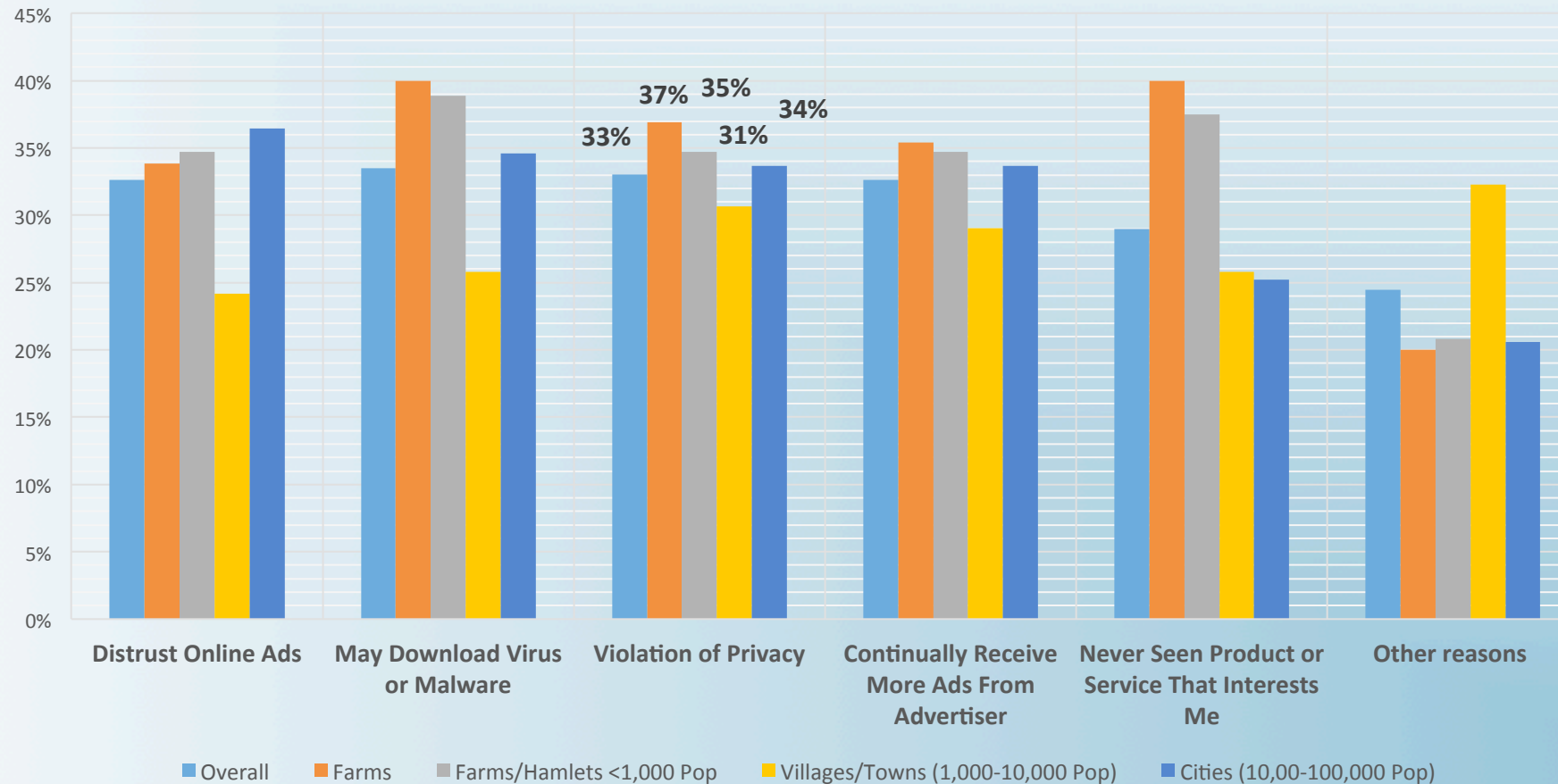


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Manitoba & Saskatchewan: Communities Under 100,000 Population

While Reasons For Not Clicking on Ads Varies, Concerns About Privacy Was Generally Cited 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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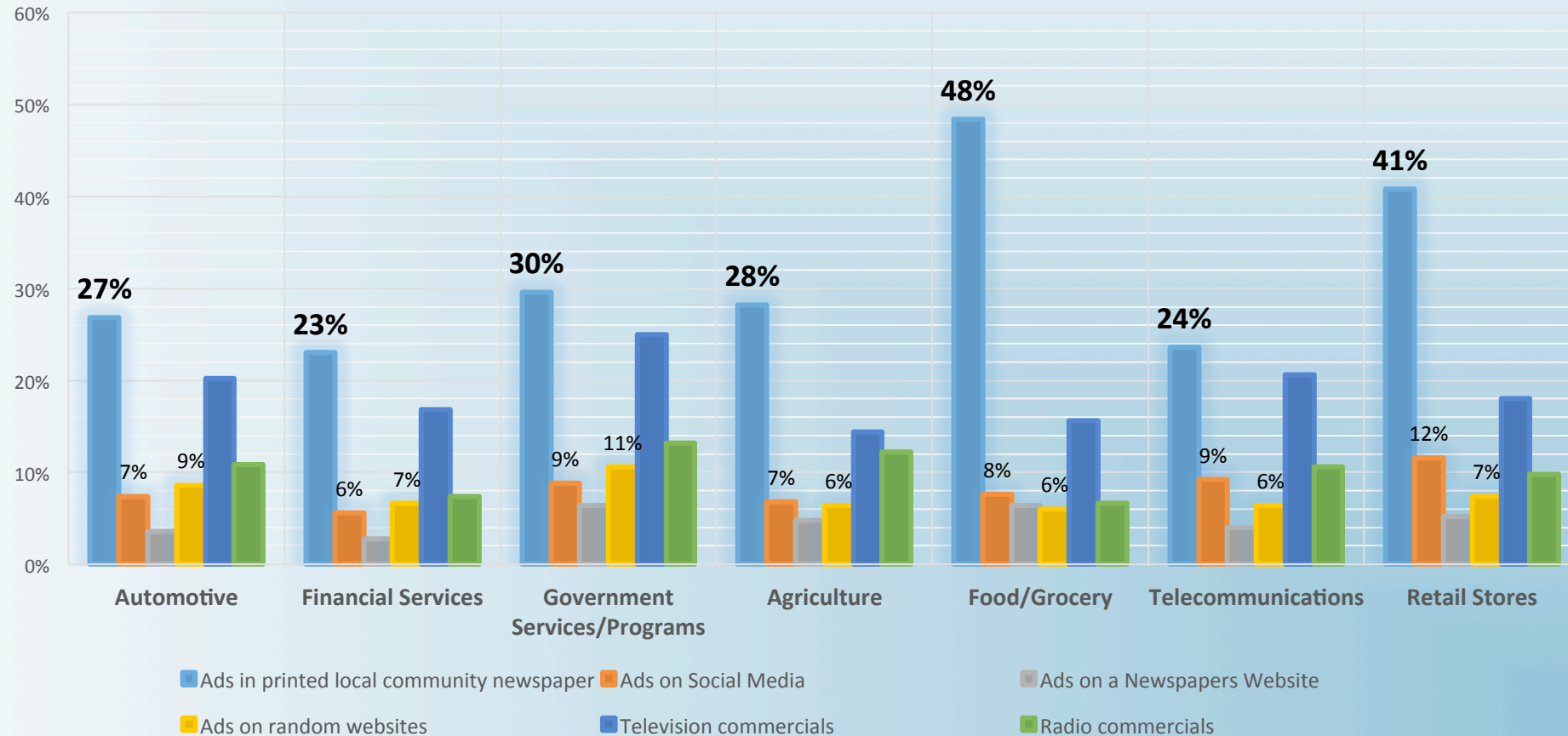


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Manitoba & Saskatchewan: Communities Under 100,000 Population

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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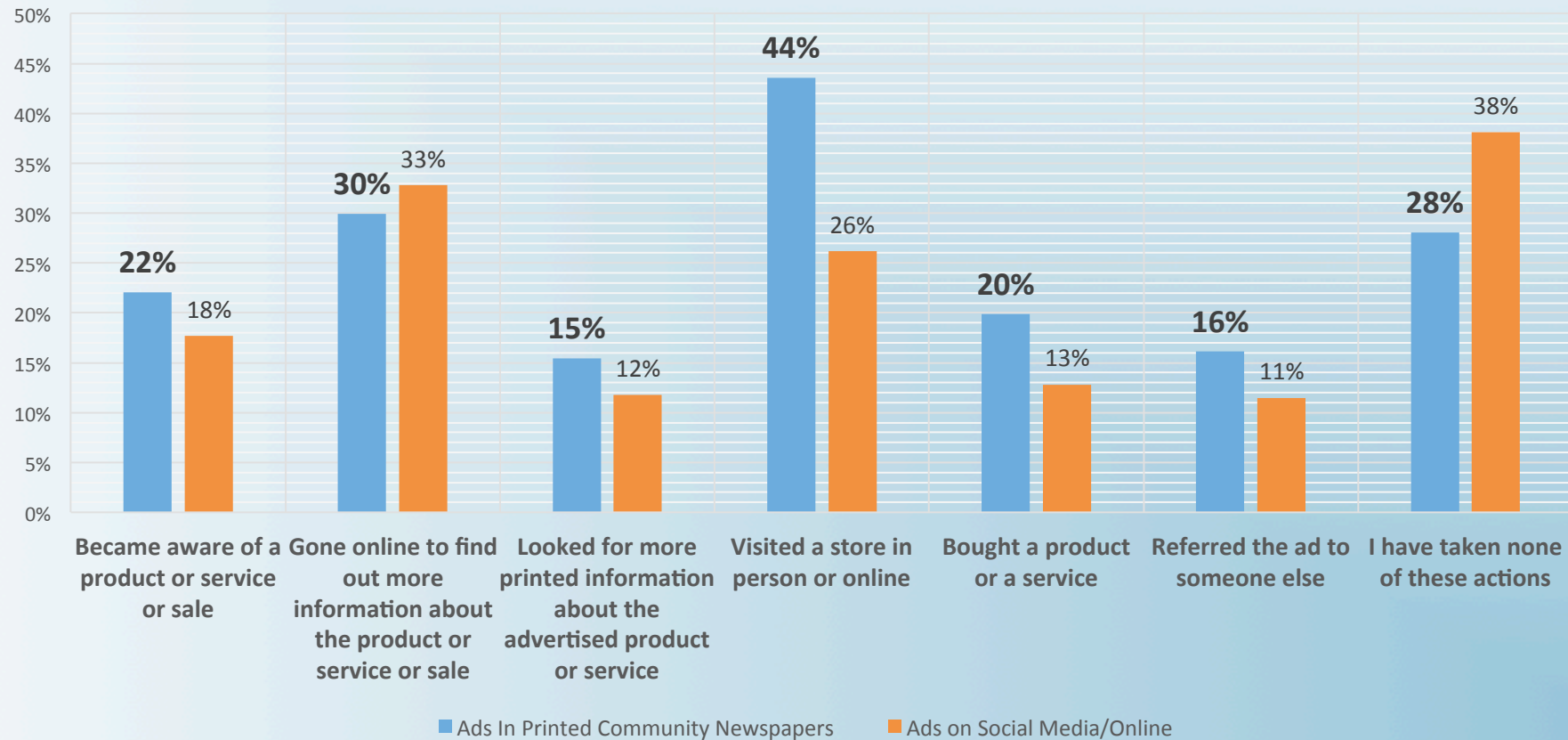


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Manitoba & Saskatchewan: Communities Under 100,000 Population

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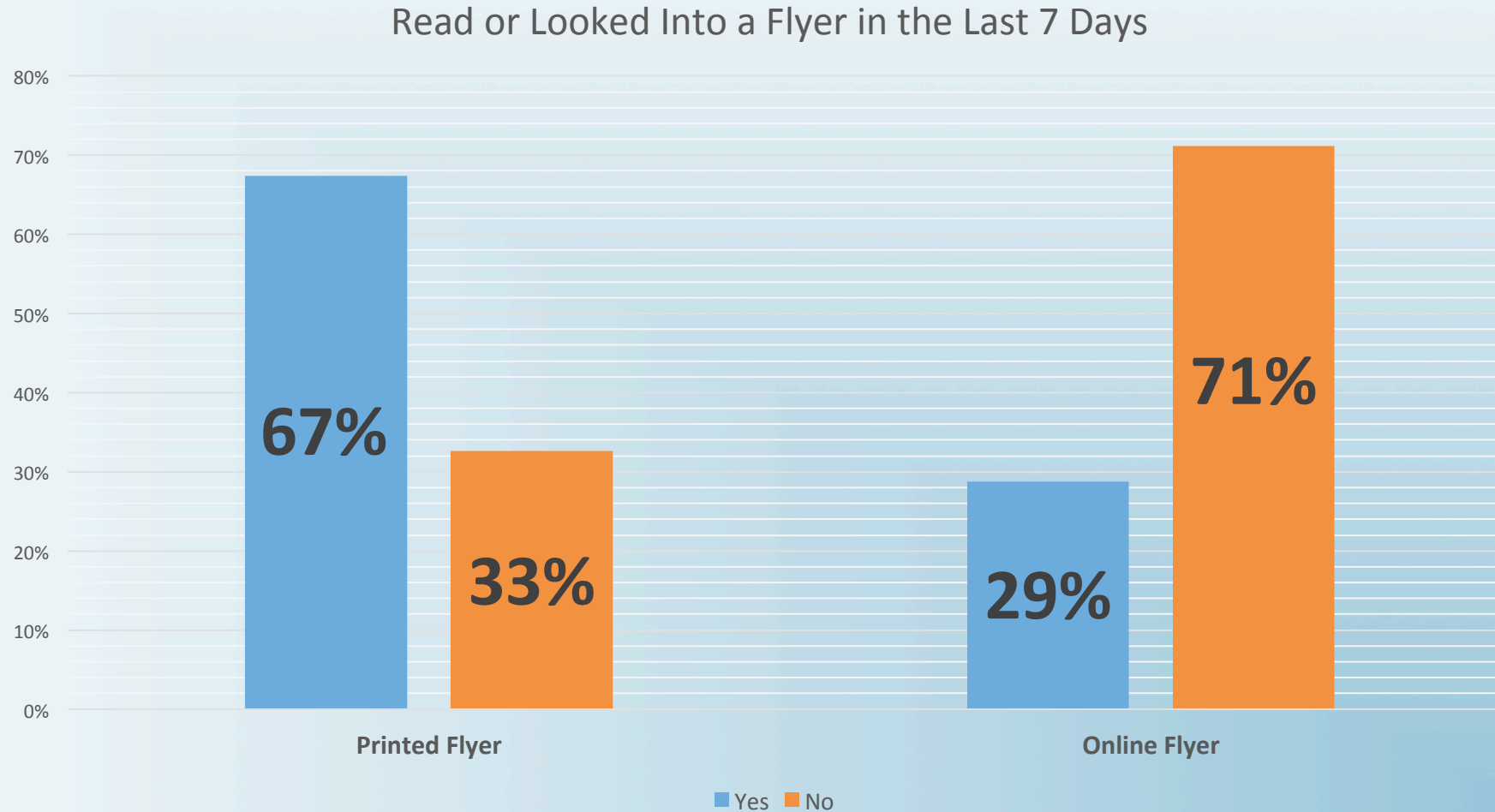
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Nearly 70% of Respondents Indicated Having Looked Into a Printed Flyer in the Last 7 Days. 30% Said They'd Looked At an Online Flyer in the Past Week



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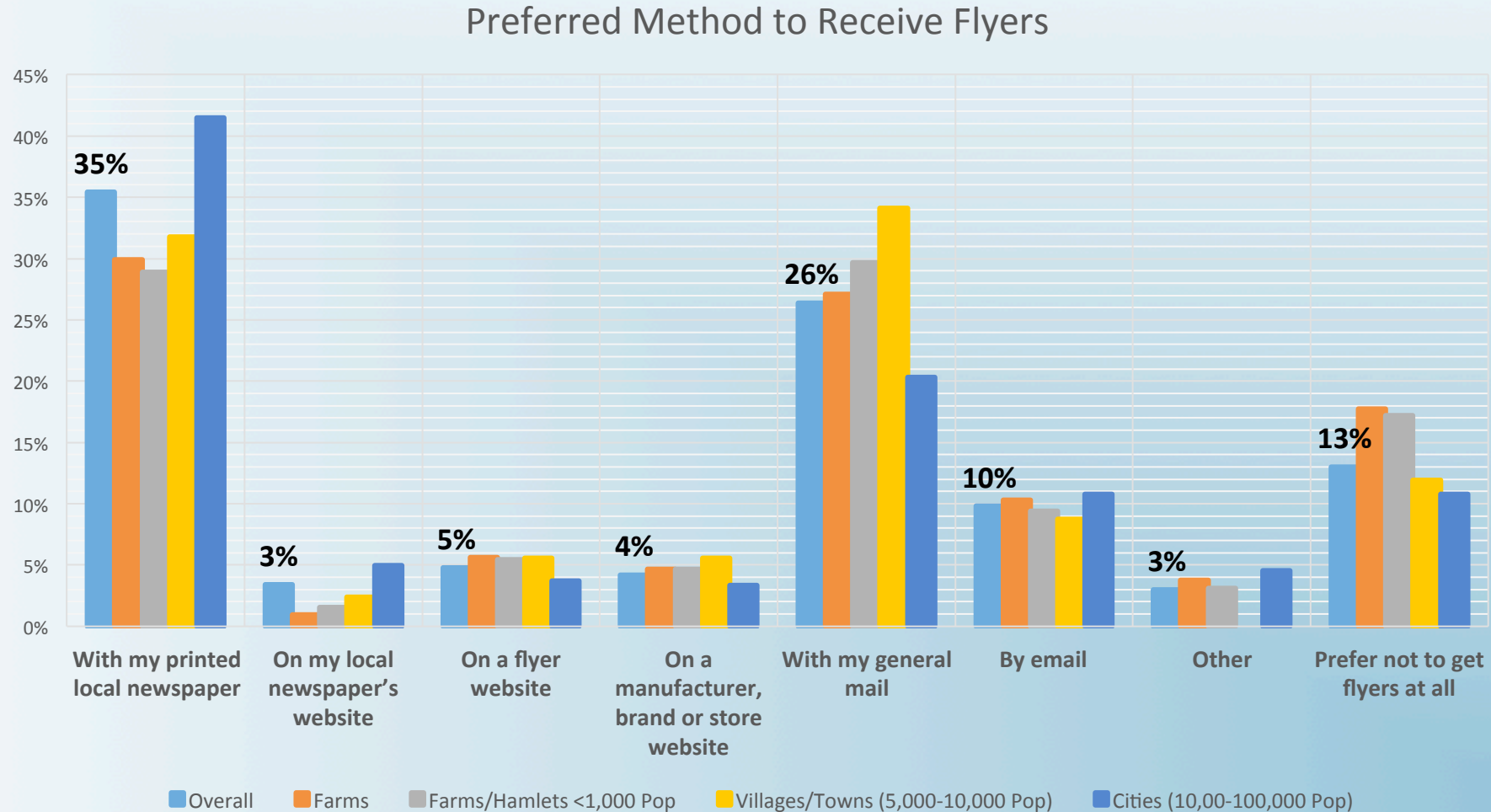
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Manitoba & Saskatchewan: Communities Under 100,000 Population

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
Plus Active Farmers

Margin of Error

500 Interviews = $\pm 4.4\%$
At 95% confidence level

500 Adult Canadians Interviewed

125 Farm

125 Small Town/Village (<10K population)

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

125 Medium City (50K to 100K population)

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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