



Community Newspaper Readership Remains Strong

ComBase
COMMUNITY NEWSPAPERS – DEFINITELY
2008/2009

Community Newspapers Span the Country



- Six million Canadians live outside urban markets (2006 Census)
- Other major media studies do not measure many small markets
- Community newspapers across Canada are the best way to reach urban and non-urban markets
- The ComBase media study measures hundreds of markets in Canada with less than 10,000 population

ComBase Takes Root in 2000



In 2000, community newspapers were not widely considered a vehicle for national advertising.

Agencies and advertisers said they wanted

- objective, independent research,
- standardized data to compare to other major media,
- readership by market and newspaper title.



"Since its inception, SaskTel has embraced ComBase as an important media planning tool, and our agencies rely heavily on it to help in the development of our plans".

Thom McInnis
Market Manager, Communications
SaskTel

ComBase Study at a Glance

- Designed as a telephone survey
- Short 10-15 minute interview including media habits, demographics
- Standard questionnaire customized by market
- Readership questions specific to local publications and radio stations
- Daily newspaper questions asked the same as NADbank
- Funded fully by member papers but governed by an independent tri-partite Board of Directors
- 2008/2009 study conducted by Leger Marketing

ComBase Evolution



Pilot Study 2001 – 5 markets

ComBase 2003 – 332 markets

ComBase 2005 – 319 markets

ComBase 2008/2009 – 218 markets

ComBase 2008/2009

- Single database with ability to segment by market and title
- 218 individual market studies
- 40,000 phone interviews
- 500+ print publications measured including community papers, dailies (paid and free), shoppers, agricultural publications
- 500+ radio stations measured by name



Stringent Specifications

- English adults only (age 18+)
- Minimum 35% response rate by market
- Randomly generated sample
- No respondent substitution
- Interviews balanced by day of week
- Standardized readership methodology for dailies and community newspapers
- Appraised by Canadian Advertising Research Foundation
- Endorsed at International Print Symposium



"Since it's beginning, nearly a decade ago, ComBase has adhered to rigorous reporting standards, and every study that has been released, starting in 2003, has been subject to the intense scrutiny that one would expect from a Tripartite Board of Directors.

As a founding Board member, and long time user of the data, I am confident that the most recent study has passed all the "scrub tests" that we could apply to it".

*David Stanger, President
DSA Media Network*

Fieldwork and Geography

- Interviewing over 4 to 12 weeks for a consistent picture of readership
- Staggered field starts by province
- Interviews conducted over three periods:
 - January to June 2008
 - September to October 2008
 - January to June 2009
- Market geography defined based on distribution area and household penetration
- Market sample size ranges from 100 to 200+ depending on number of households
- Rolling sample from previous studies eliminated

New Questions – Media and Life Stages

- Readership of online newspapers
- Readership of free daily newspapers
- Satellite radio
- Life Stages
 - Marriage
 - Change job
 - Retire/Semi-retire
 - Child/grandchild born or adopted
 - Move within same city/different city

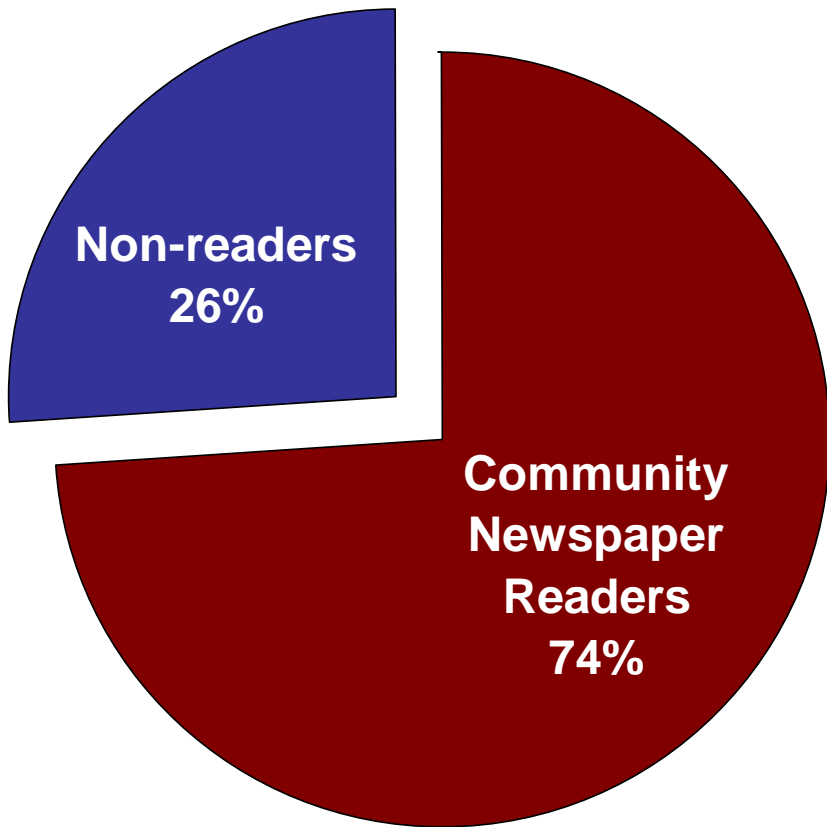


New Questions - Computers / Internet

- Number of computers in the household
- Access to the Internet
- Time spent with Internet in past week
- Internet activities
 - Email
 - Searching for information
 - Social networking
 - Shopping
 - Watching videos/movies/TV



Three Quarters of Canadians are Community Newspaper Readers



- **74%** of adults read any of the last four issues of their local community newspaper
- **63%** read any weekday daily newspaper
- **18%** read any newspaper online
- **25%** of community newspaper readers are exclusive
- **89%** of adults are print or online newspaper readers

Community Newspaper Readership Remains Strong

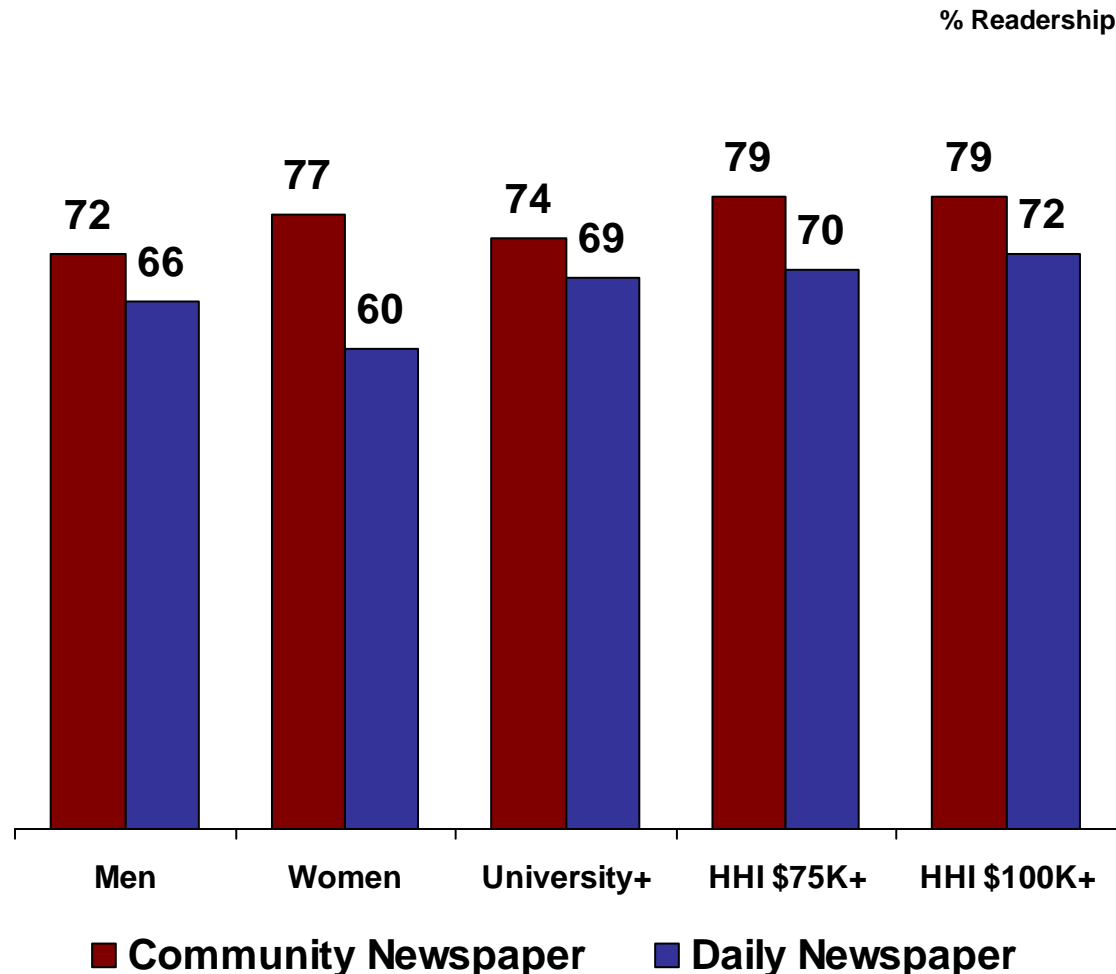


- Some of the most desirable target groups are strong community newspaper readers – adults 18-34, university educated and high income earners
- Exclusive community newspaper readership is also strong across all the desirable target groups – a substantial percentage can't be reached with advertising in daily newspapers
- Many adults are also difficult to reach with commercial radio - local community newspapers effectively reach non-listeners



How Do You Reach Them?

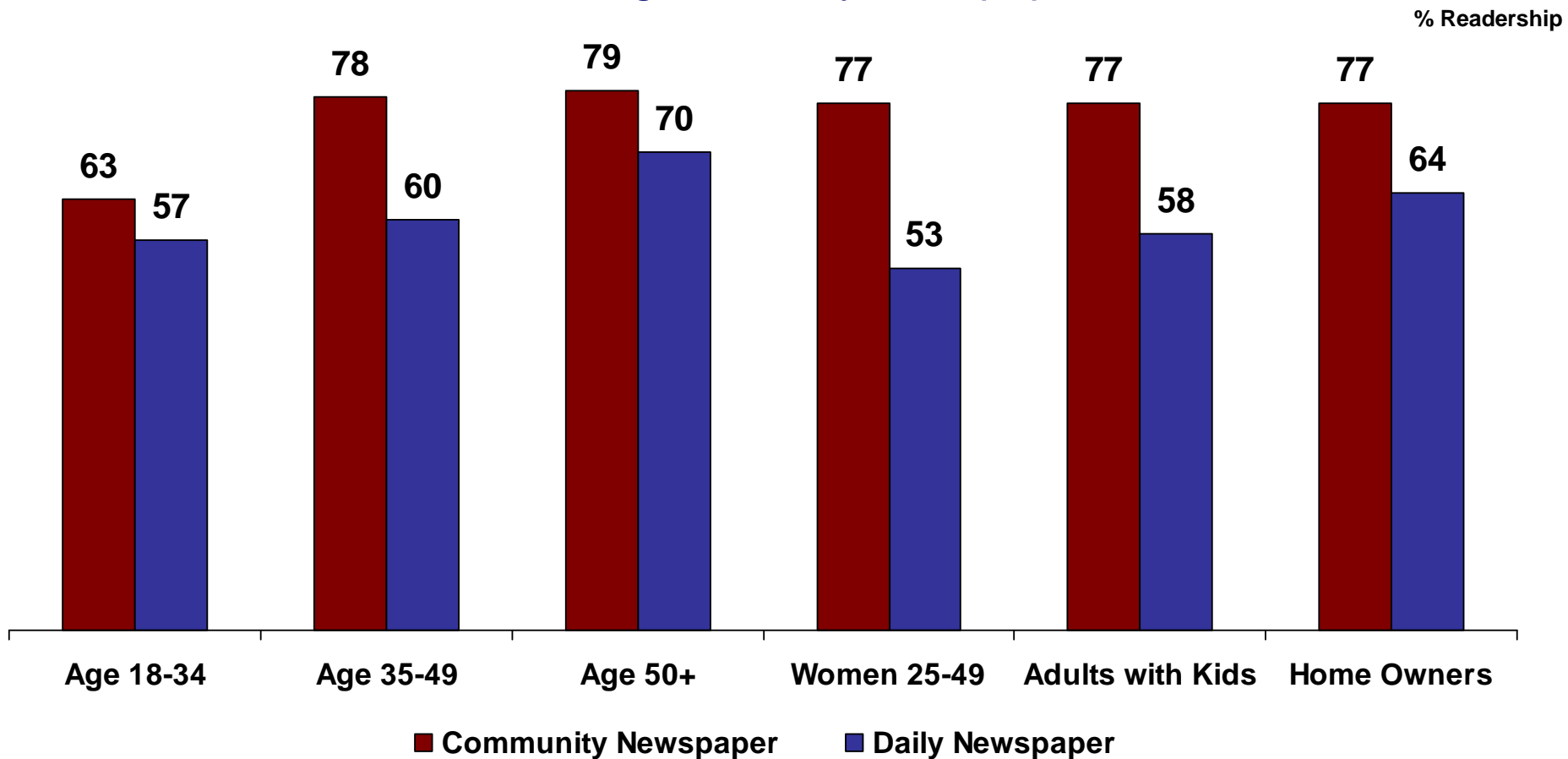
- Community newspapers are read by even the most desirable target groups
- Among adults with a university+ education, **74%** read community papers compared to **69%** who read daily newspapers
- Among adults with household incomes over \$75K, **79%** read the community paper compared to **70%** who read the daily newspaper



Community Newspapers Reach Desirable Demographics



77% of women 25-49 are reading community papers compared to **53%** who are reading their daily newspaper.



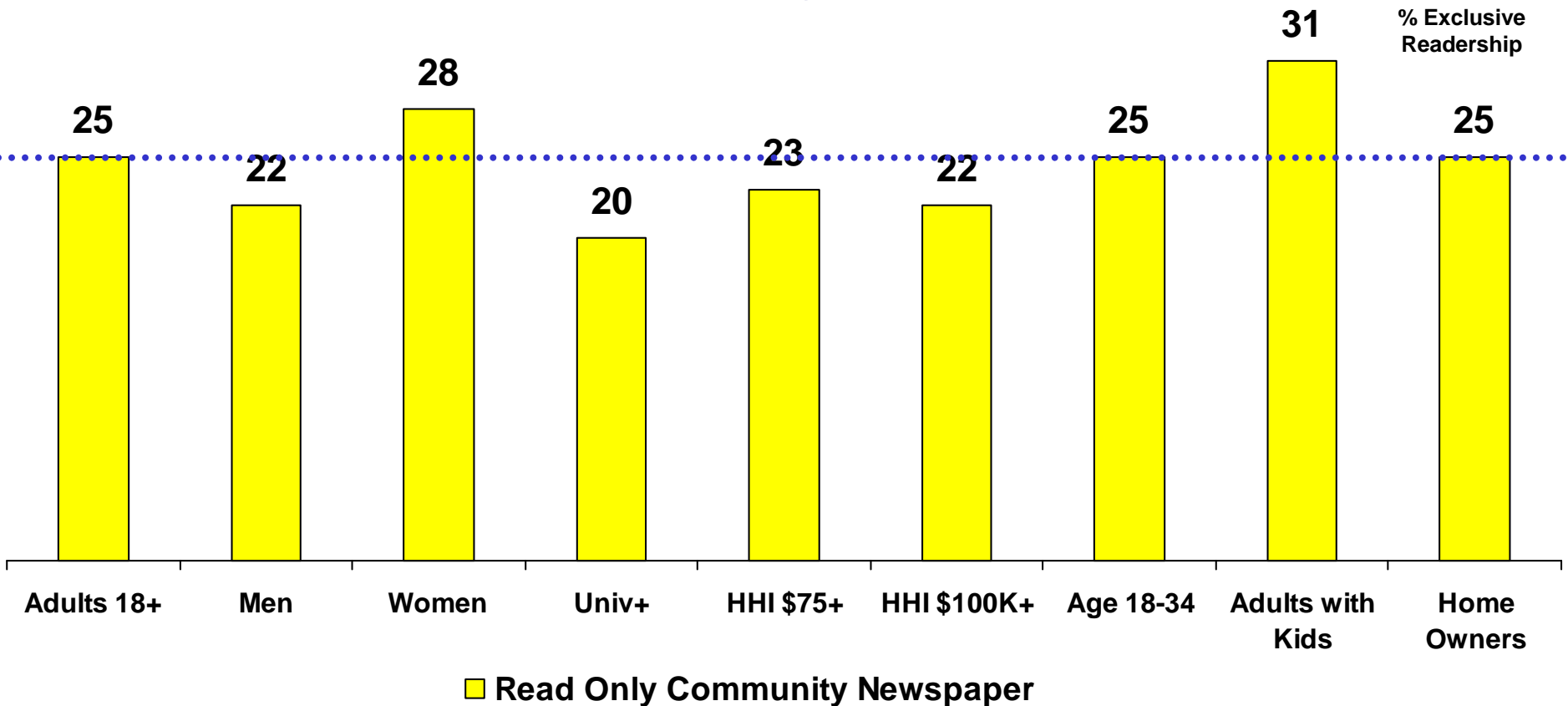
Source: ComBase 2008/2009 Population 5,542,317 Sample 39,812

Cumulative readership – read any of the last four community newspaper issues, read any of the last five weekday daily newspaper issues

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Some Readers Can ONLY Be Reached with the Local Community Paper

31% of adults with children read only their community paper and cannot be reached with advertising in daily newspapers.



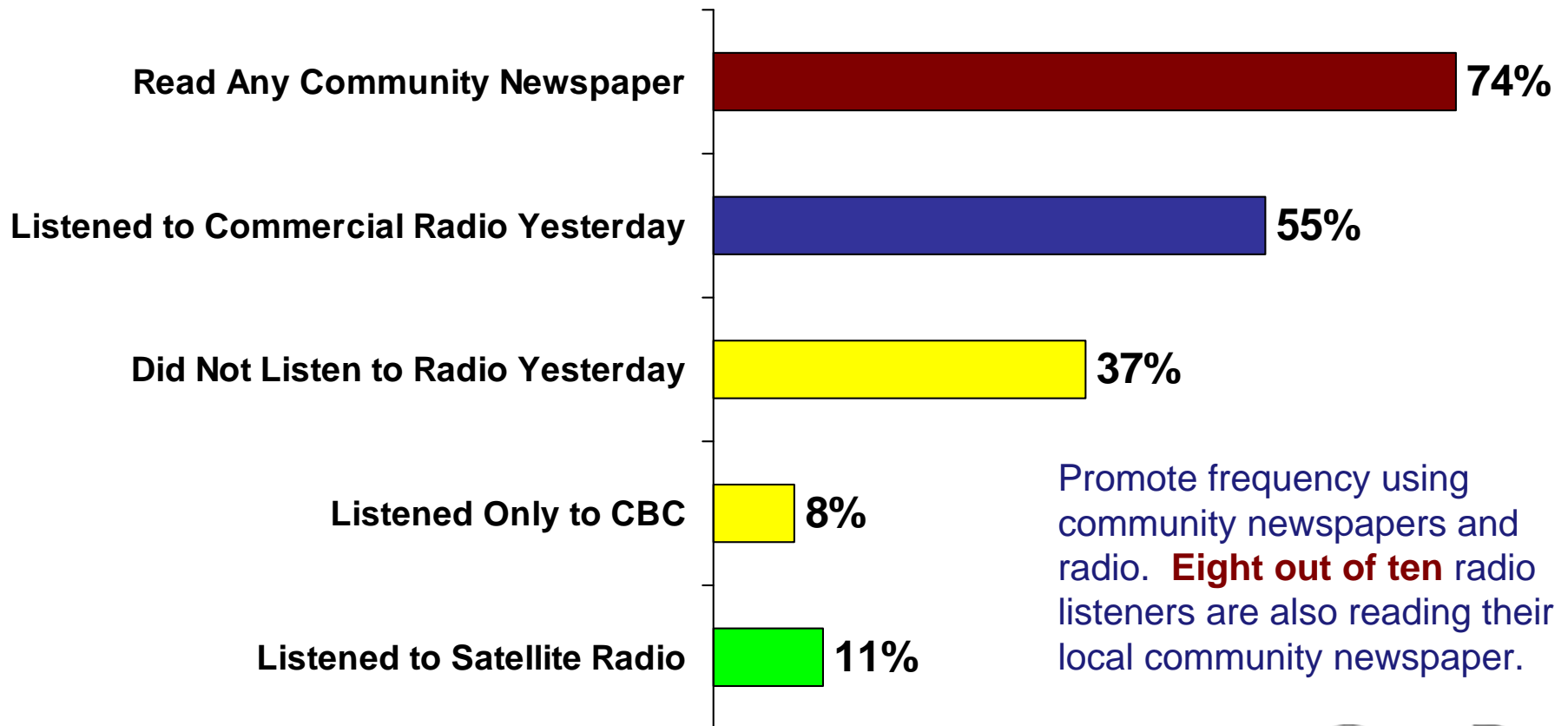
Source: ComBase 2008/2009 Population 5,542,317 Sample 39,812

Cumulative readership – read any of the last four community newspaper issues, read any of the last five weekday daily newspaper issues

Exclusive readership – read any community newspaper and did not read daily newspapers

45% of Adults Cannot be Reached with Commercial Radio*

A newspaper is often read by more than one person and has a long shelf life. Radio is a fragmented medium requiring many ads on many stations to effectively reach the market.

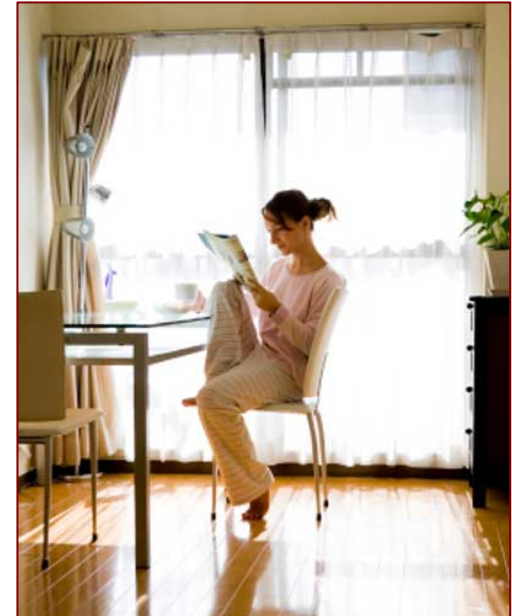


Promote frequency using community newspapers and radio. **Eight out of ten** radio listeners are also reading their local community newspaper.

Source: ComBase 2008/2009 Population 5,542,317 Sample 39,812
Cumulative readership – read any of the last four community newspaper issues, read any of the last five weekday daily newspaper issues
* Did Not Listen to Radio Yesterday or Listened ONLY to CBC (no advertising)

Relationship with Community Papers

- Canadians **are** reading their community newspapers
- Insight into relationship with community newspapers

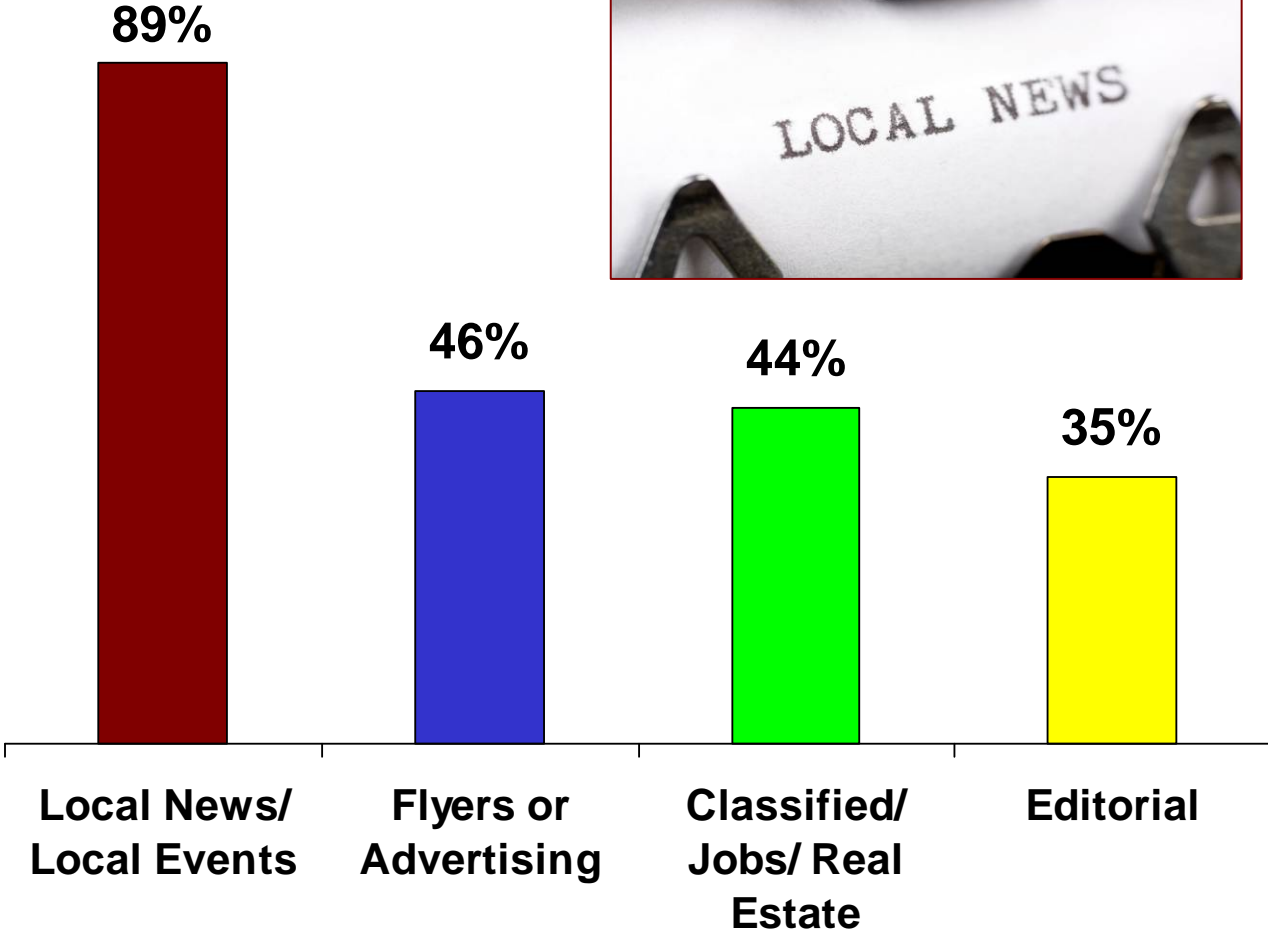
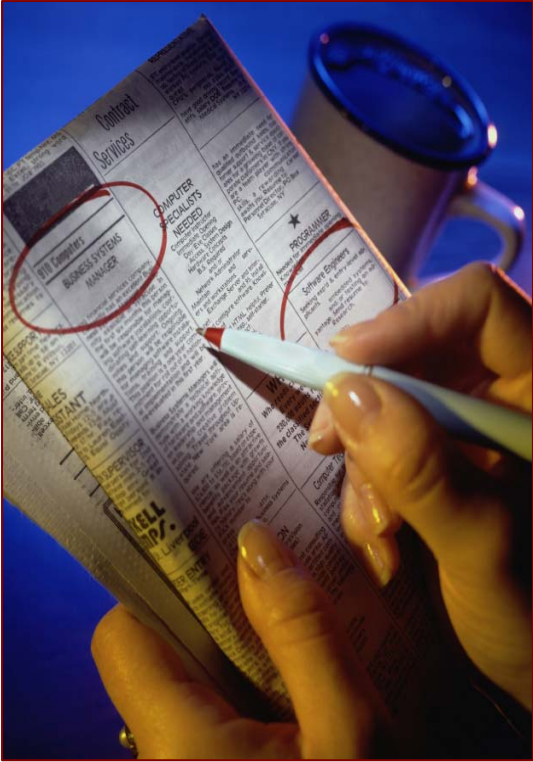


What are the main reasons for reading your community newspaper?

<i>Local News</i>	<i>Advertising</i>	<i>Classifieds</i>
<i>Local Events</i>	<i>Flyers</i>	<i>Jobs/Employment</i>
<i>Editorial</i>		<i>Real Estate</i>

Nine of Ten Community Newspaper Readers Choose Local News/Events as their Reason for Reading

% of Community Newspaper Readers



Source: ComBase 2008/2009 Population 5,542,317 Sample 39,812
*read any community newspaper. Multiple mentions accepted

Why Do Readers Turn to Community Newspapers?



Half of Saskatchewan readers choose Classified Advertising as a reason for reading their local community newspaper.

	All	Atlantic	ON	MB	SK	AB	BC	North
Editorial	35%	35%	31%	34%	36%	33%	36%	28%
Local News	82%	84%	80%	84%	81%	80%	82%	80%
Local Events	63%	63%	57%	60%	65%	61%	65%	51%
Classified	33%	33%	33%	42%	50%	37%	29%	29%
Real Estate	22%	19%	24%	21%	26%	25%	21%	16%
Jobs/Employment	19%	21%	20%	23%	24%	21%	17%	30%
Advertising	31%	29%	32%	33%	38%	29%	31%	23%
Flyers	36%	30%	39%	31%	39%	29%	40%	14%



Flyers



- Research shows community newspapers are preferred delivery vehicle for flyers
- ComBase 2008/2009 gathers data on readership of flyers delivered in the community newspaper
- 11 categories measured

Grocery Stores
Drug Stores
Home Improvement Stores
Auto Supply Stores
Department Stores
Fast Food Restaurant
Furniture/Appliance/Electronics
Computer Hardware/Software
Investments/Banking Services
Telecommunications/Wireless
Other Products or Services

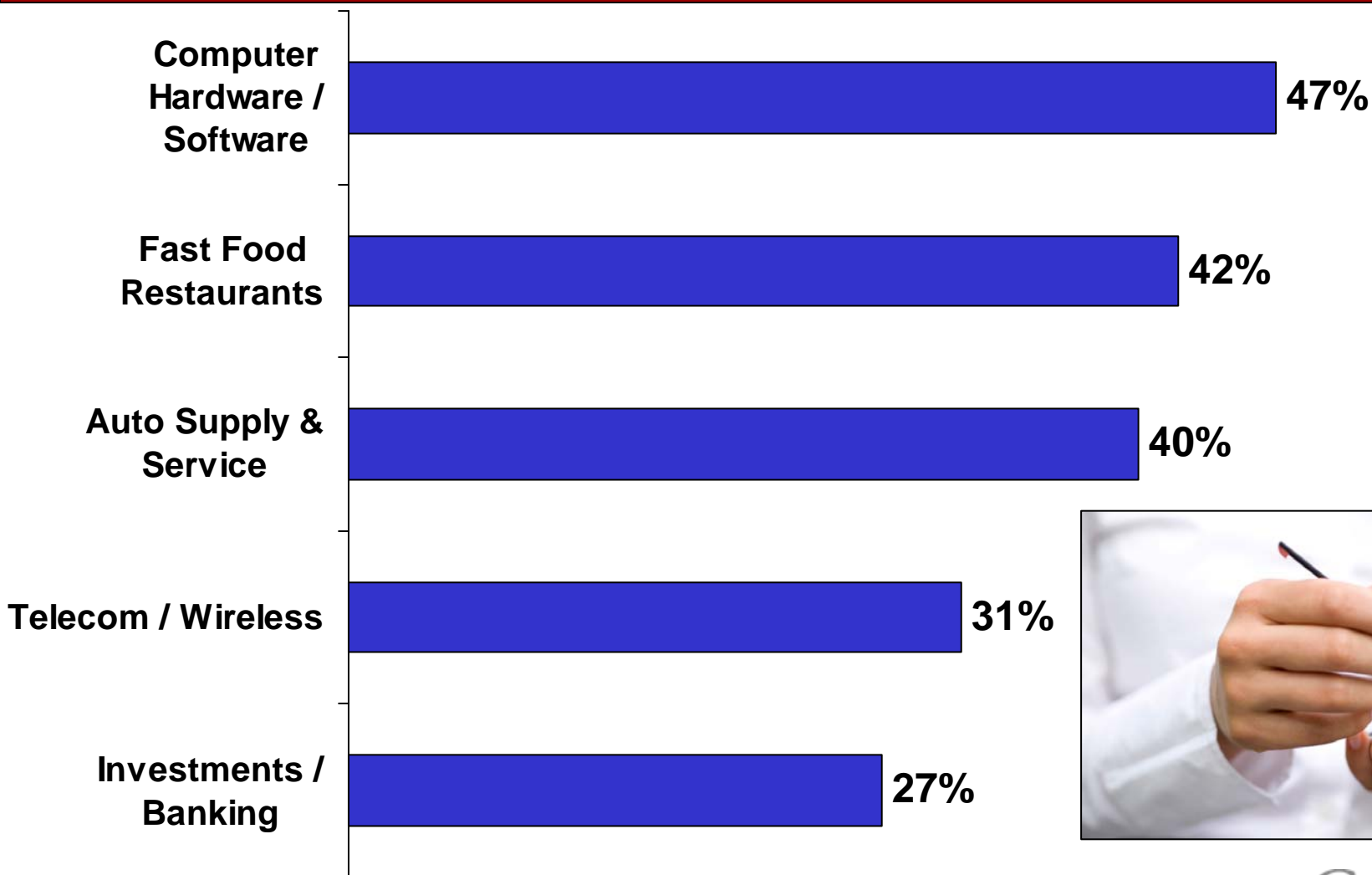
76% of Community Newspaper Readers Look at Grocery Flyers*



Source: ComBase 2008/2009 Population 5,542,317 Sample 39,812

*Sometimes/Always read flyers delivered in community newspapers. Multiple mentions accepted

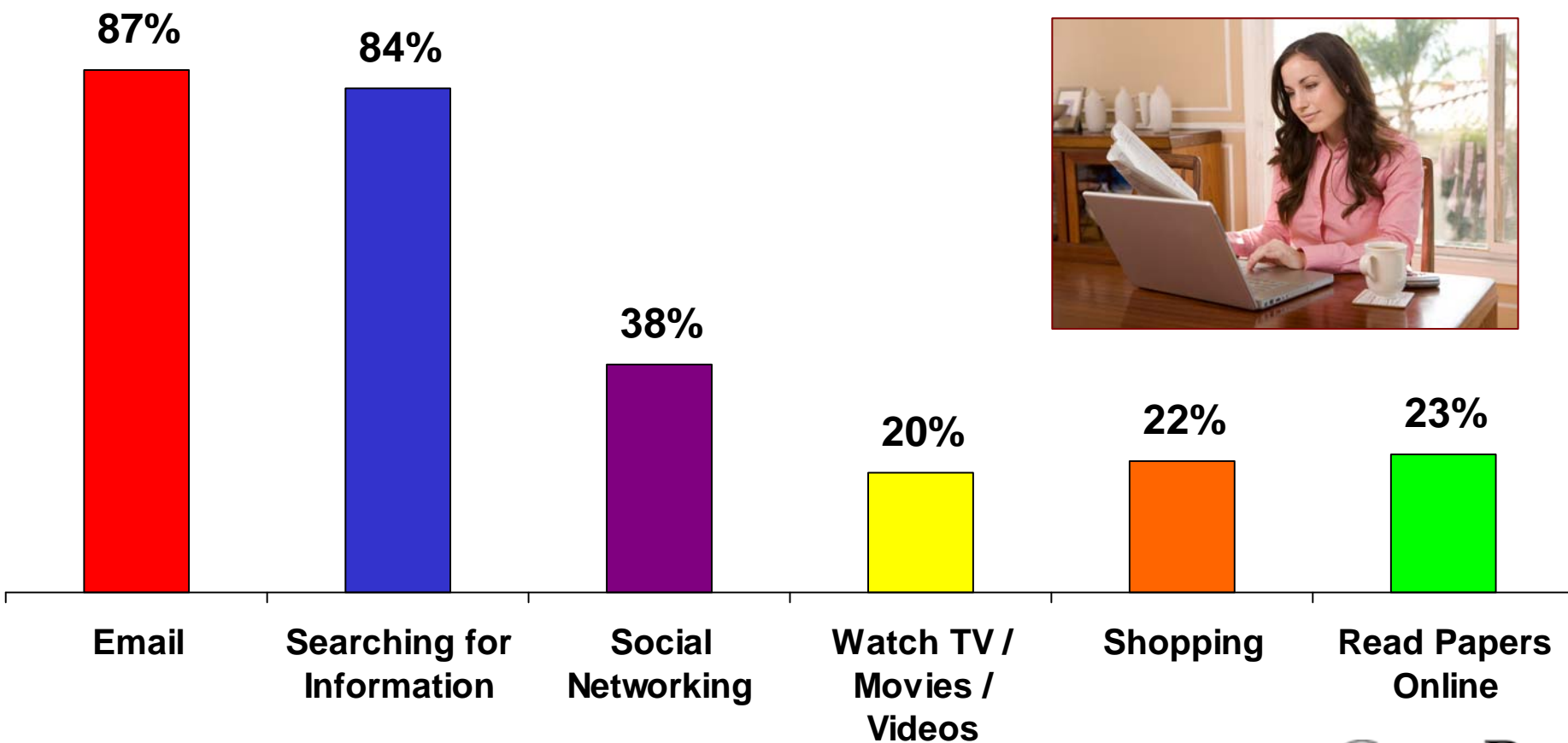
31% of Community Newspaper Readers Look at Telecom/Wireless Flyers*



Source: ComBase 2008/2009 Population 5,542,317 Sample 39,812
*Sometimes/Always read flyers delivered in community newspapers. Multiple mentions accepted

Eight of Ten Community Newspaper Readers Access the Internet at Home

84% of community newspaper readers search for information as one of their primary online activities.



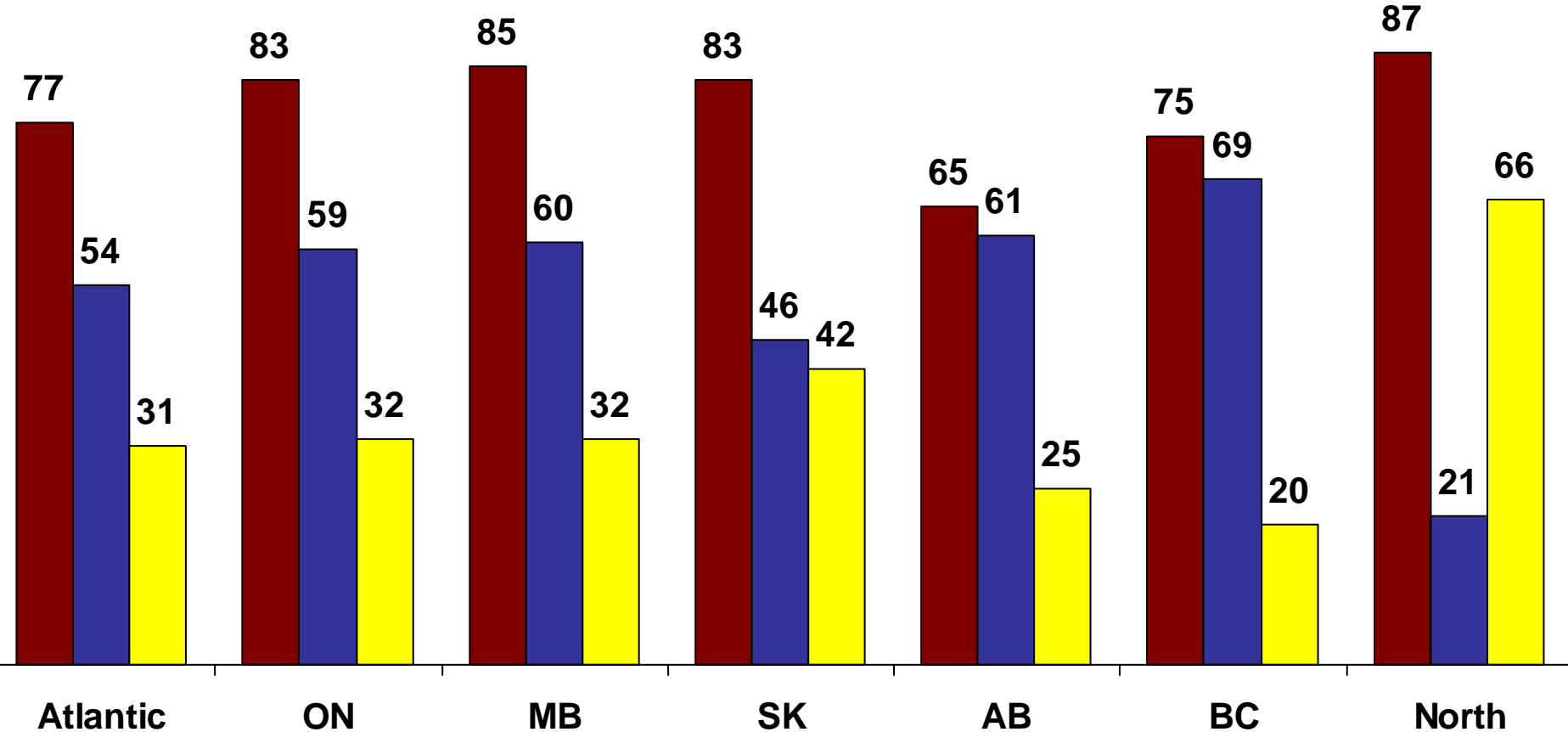
Community Newspaper Readership is Strong Across the Country

- Community newspaper readership is strong and that trend continues provincially
- The top 3 provinces/regions with the highest community newspaper readership are:
 - **87%** in Northern Canada
 - **85%** in Manitoba
 - **83%** in Saskatchewan
- Exclusive readership represents adults that cannot be reached with advertising in daily newspapers
 - Northern Canada has one of the highest exclusive readership figures at **66%** - even higher than daily newspaper readership



Community Newspaper Readership is Strong Across the Country

% Readership



■ Community Newspapers ■ Daily Newspapers ■ Exclusive Community Papers

Source: ComBase 2008/2009 Population 5,542,317 Sample 39,812

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