





The next 40 minutes could change your life...











I am looking for a stable relationship with someone strong and reliable. What are you like?











Stable

"I believe **newspapers** will be around in their **printed form** for **many years to come** ...readers continue to seek out newspapers, both in print and online. In fact, the **combined offline and online** readership in 2008 is the **same** as it was in 2003."

- Hugh Dow, Chairman, Mediabrands Canada









Strong

- Yesterday 41% more people around the world read a newspaper than went online
- More people read a
 newspaper every day than
 eat a Big Mac in a year









Strong

- 97 dailies and >1,100 community newspapers
- Almost half read a daily newspaper each day
- 3 out 4 read a <u>daily</u> newspaper each week
 3 out 4 read a <u>community paper</u> any of last 4 issues
- 48 minutes spent reading dailies on weekdays
 68 minutes on Saturday
- 62% of newspaper readers often <u>keep</u> the sections or the whole paper for <u>more than one day</u>
- 75% of newspaper readers browse the ads









Strong – Use for launch













Reliable

Canadians read newspapers (print and online) more during a crisis or major events for trustworthy and reliable information









Reliable













Relevant

Source of News		
News Source	% of Respondents (Multiple Response)	
News website	65%	
Newspaper (online)	57	
Newspaper (print)	55	
National TV news	55	
Local television affiliate	42	
News aggregator	36	
Blogs	23	
Social networking site	11	









Relevant











I'm intrigued. But, given you have been around, do you have any "baggage"?











Perception

Owner ≠ Newspaper

Some too much debt

Deliver Audiences Make money

U.S. "rub-off"

<u>US</u> <u>Canada</u>

2009 -30% -11%

2010E -6% +5%



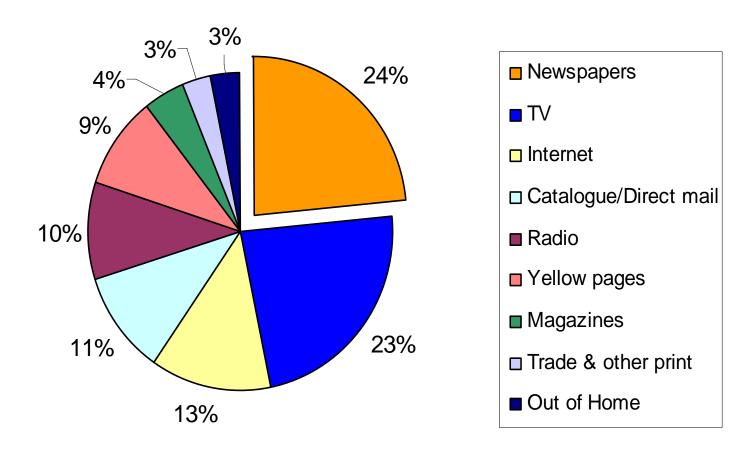


Newspaper ad revenues estimates: J.P. Morgan (April 2010); TD Newcrest/TVB 2010





Canadian Media Industry 2009



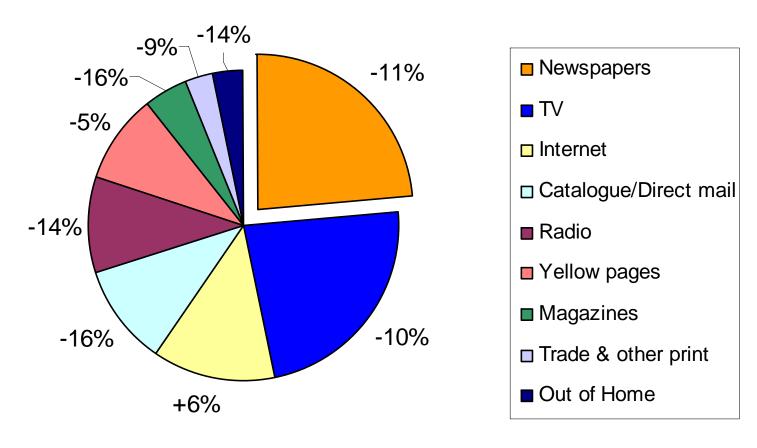








Canadian Media Industry 2009 % change vs. 2008



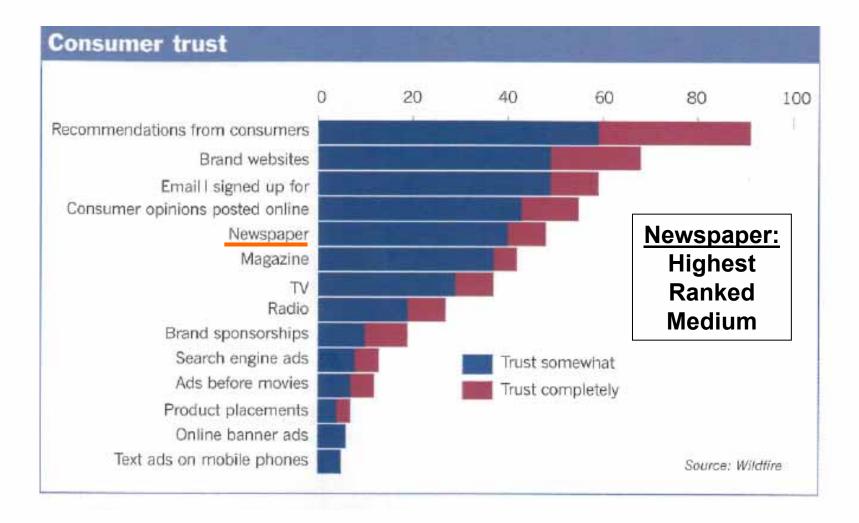








Good Baggage - Trust













Trust

Importante mise à jour de Toyota Canada.

On a beaucoup parlé de Toyota. Voici donc les faits pour nos clients.

Votre sécurité demeure notre première priorité :

- Dans l'intérêt de nos clients, Toyota a examiné à fond, et continuera de le faire, les préoccupations relatives à nos produits et veillera à régler les problèmes qui ont été relevés.
- Nous continuerons de prendre les mesures appropriées pour résoudre les problèmes, s'il y a lieu, et nous informerons nos clients le plus rapidement possible.

Les derniers développements concernant le rappel des pédales d'accélérateur qui se coincent :

- Les concessionnaires ont tous reçu les pièces de réparation et les techniciens certifiés Toyota ont commencé à modifier les véhicules touchés.
- Nos concessionnaires sont là pour intervenir sur votre véhicule et ils seront nombreux à effectuer de longues heures de travail.

Les véhicules Toyota sont conçus et fabriqués en fonction de votre sécurité. Toute notre organisation dans le monde entier a été mobilisée et nous redoublons d'efforts pour nous améliorer et continuer d'offrir des produits de qualité à nos clients.

Depuis que nous avors commencé à vendre des voltures au Canada, il y a plus de 45 ans, nous nous sommes engagés à vous offrir un produit flable et de qualité. En retour, vous nous avez récompensés par votre fidélité et votre confiance. Notre but est de continuer à mériter cette confiance tous les jours.

Pour obtenir les demiers renseignements, veuillez visiter notre site Web toyota.ca mis à jour, consulter votre concessionnaire ou appeler notre centre d'interaction avec la clientèle au 1 888 TOYOTA-8 (1 888 869-6828).



An important message from Toyota Canada.

As you know, we have issued a recall on select Toysta models in response to reports that, in rare cases, there is the possibility that the accelerator pedal may mechanically strick.

We have also taken the unprecedented step of suspending the production and delivery of the affected models.

We regret any loss of peace of mind that this recall may have caused.

But a recall was necessary because we place the safety of you, our customers, above everything else.

We mobilized our engineering teams around the world to immediately find a solution for the problem. And they have. This will be applied to all affected models – on the road and on the production line – so that every Toyota owner can commune to feel confident in their vehicle.

This week, we will begin mailing information directly to every Toyota owner affected by this recall, with instructions on exactly what they should do next.

For the latest information we encourage you to visit our updated website at togota.ca, contact your dealer, or call the customer interaction centre at 1-888-TOYOTA-8 [1-888-869-6828].









Good Baggage - Prefer print

Almost half of adults aged 18-64 say they <u>prefer</u> the experience of reading a <u>printed newspaper</u> vs. online sources.

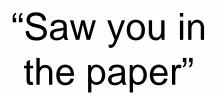








Aura of print





"What if the papers got hold of it?"

BOMBSHELL

Extortion charges for Ludwig in pipeline case By RYAN CORNICE, HANNESS BEHOVMANN

EDICOTON - Consisted oil paich bomber Wiebo Ladwig is to be rhanged with one count of extention of the energy conquery Edicina. which has been the target of a superierious series of attacks on gas playlines in sorthwarbers B.C. over the past 15 months. It's a stunning trans of extent is the same considering that the Ladwig was madlast year to be helping police in fruit that attacks in an end. See FFELDED on Paice M.

"We don't want it on the front page"







"How would your friends describe you?"











Exciting

"We continue to believe in the <u>value of</u>
<u>traditional media</u> companies so long as they
are poised to <u>adapt</u>, have a decent
<u>mix of assets</u>, including those less affected
by secular trends, and the <u>balance sheet</u>
<u>strength</u> to invest in their adaptation.
In our view, we are living through <u>the most</u>
<u>exciting period in the history of media</u>."

Scott Cuthbertson, Industry Analyst,
 TD Securities









Popular

Media Usage Yesterday, Canada

Spent at least some time with... Base: All Canadian online users 18+













Engaging

8 criteria for engagement:

Trustworthy

Personal connection

Inspires me

Usually notice ads*

My personal time out

Makes life better

Enhances interactions with others

Likely to purchase*

	Average % Engagement Score	Average Engagement Index	Average % Advertising Engagement Score +	Average Advertising Engagement Index
Newspapers	43%	109	37%	118
TV	37%	101	26%	100
Radio	37%	100	26%	98
Internet	33%	95	22%	95
Total Media	37%	100	26%	100











Open and positive (to ads)

Consumers with a positive opinion of the ads:

Print (newspapers and magazines)	52%
Outdoor	50%
Television	49%
Cinema	45%
Opt-in emails	36%
Radio	35%
Online search ads	28%
Produce placements	21%
Online ads	20%
Direct mail	14%
Non opt-in emails (spam)	9%
Telemarketing	7%
Ads on mobiles	6%



Garner Attention & Wield Influence

73% of newspaper readers have been influenced to buy something as result of an ad in a printed newspaper.









Garner Attention & Influence purchase



Brand:

Marks & Spencer

Situation:

Charged £2 more for >DD

Solution:

Newspaper ads to announce removal of £2 and 25% for 2 weeks







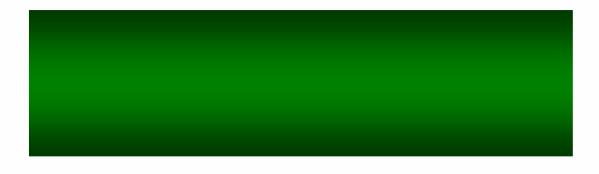




Driver...to online

I have gone <u>online</u> to <u>find out</u> <u>more</u> about something that I have <u>seen in a print newspaper</u>

Agree



Ipsos Reid for the CNA, 2010

70%

To what extent do you agree or disagree with the following statements: Base: Newspaper readers n=669





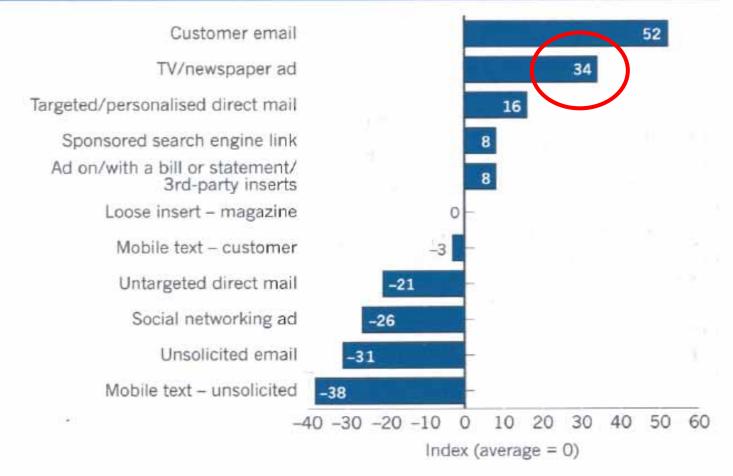


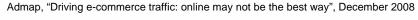




Driver... to online

Advertising effectiveness for driving web visits and online purchases













Drive to online



Brand:

Vegemite – new cheese flavour

Challenge:

Australians hate the name

Solution:

Newspaper ads asking public to vote online for new name









Willing to experiment

More players





Innovative offerings













Calgary, Ottawa, Toronto, Vancouver, Montreal







Content

















Are you in touch with your feminine side?





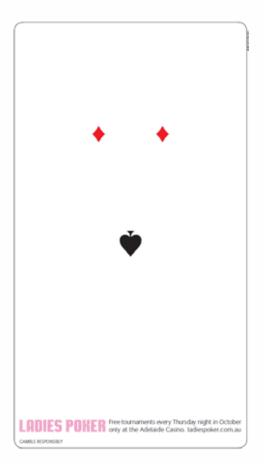






Women

Almost half read a daily newspaper <u>yesterday</u>
75% read a <u>daily</u> (print or online) in the <u>last week</u>
76% read a print <u>community</u> paper <u>any of last 4 issues</u>



NADbank 2009; ComBase 2008/2009











Target All

"Newspapers provide very quick instant reach."

Hugh Dow, Chairman,
 Mediabrands Canada

National Post, "The enduring newspaper: Advertisers still bullish on print", April 27, 2009











Target All













Men

51% read a daily newspaper <u>yesterday</u>
80% read a <u>daily</u> (print or online) in the <u>last week</u>
72% read a print <u>community</u> paper <u>any of last 4 issues</u>



NADbank 2009; ComBase 2008/2009











Families

Almost half read a daily newspaper <u>yesterday</u>

Three-quarters read a <u>daily</u> (print or online) in the <u>last week</u>

Three-quarters read a <u>community</u> paper <u>any of last 4 issues</u>



Advertiser:

Lifebuoy hand wash

Copy:

You eat what you touch

NADbank 2009; ComBase 2008/2009





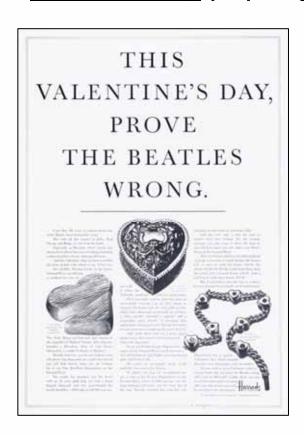






Boomers

56% read a daily newspaper yesterday
81% read a daily (print or online) in the last week
79% read a print community paper any of last 4 issues



NADbank 2009; ComBase 2008/2009 (age 50-64)





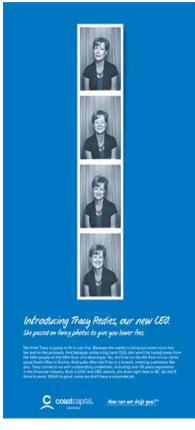






Business Executives

50% read a daily newspaper yesterday
82% read a daily (print or online) in the last week
75% read a print community newspaper in the last week



Advertiser: Coast Capital

Headline:

Introducing Tracy Redies, our new CEO

Copy:

She passed on fancy photos to give you lower fees

NADbank 2009; ComBase 2008/2009











Young Adults

12% of the adult population in 18-24 years old
12% of print daily newspaper readership is 18-24
9% of print community paper readership is 18-24













Teens

READ

- 73% read newspapers
- 69% visit newspaper websites

FREQUENCY

- 1 in 4 teens reads the newspaper on an average day
- 53% read a newspaper in the last week (15-17s @ 60%)
- 4 in 10 visit a newspaper website frequently

TOP SECTIONS

- 48% Comics
- 42% National news
- 36% Sports→Boys 47%

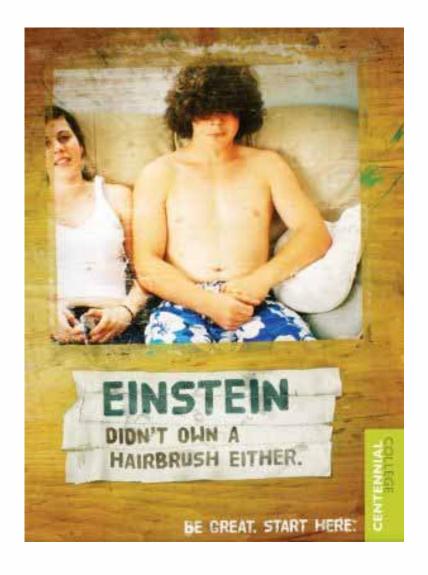
TEEN READERS SPEND

- 52% Local news→18-19=65%
 65% plan on buying a used car
- 51% Entertainment Girls 60% 63% plan on buying a phone (yr)
 - 62% went to a department store*
 - 62% went to a specialty store* (e.g. Old Navy, Abercrombie)

^{*} Past 30 days



Teens

















"I can't wait to see what you are like online"





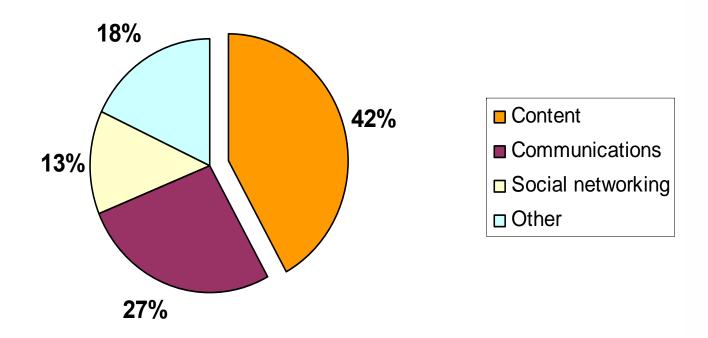






Content is King

Where online users spend their time



Content has grown from 32% in 2003





Online Publishers Association, 2009





Destination

- <u>37%</u> of all internet traffic is going to <u>newspaper websites</u>
- Newspaper websites are the number 1 local site in 22 of the top 25 markets

Nielsen Online, April 2010; National Post, "It's like time travel: Power of the printed news has to hold our culture", April 29, 2009









Newspaper site users

- 30% of Canadians visit a newspaper site or hub*
- Read print: Most (80%) newspaper website readers also read a print newspaper
- Go online more: 58% check the internet several times a day vs. 34% for all online adults
- <u>Driver to other sites</u>: 75% have seen something on a newspaper site and have gone online to find out more
- Shop: 62% have shopped vs. all adults (55%) in the last week^

^{*} umbrella sites housing individual newspapers (e.g. CanWest publishes Canada.com; Quebecor, Canoe.ca and Cyberpresse.ca is the website for the Gesca newspapers)

[^] excludes grocery, gas, toiletries and drugs



Ads out-perform on newspaper sites

"Ads on web sites that provide original content including those operated by newspapers, outperform ads on other sites, such as portals... Ads on content sites performed better than ads on other sites across nearly all of the 47 metrics studied, ranging from brand awareness to intent to purchase...

<u>strong response</u> (was noted) among <u>18-to-34</u>-year-olds. This demographic was <u>twice as likely</u> to form a favourable opinion of brand on a content site than on a portal."







Winter and angwheli to









Newspaper and online

Individually newspaper website and print newspaper advertising are equally effective and combined, they can improve overall ad effectiveness.









Newspaper and online



Brand:

Gay Lea Spreadable Butter

Objective:

Reinforce its benefit: butter that spreads

Action:

After mag. & online launch, ran test in newspapers & their sites

Results:

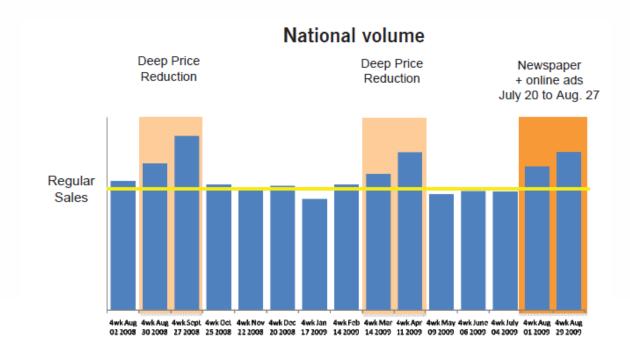
- All key metrics driven up
- Substantial sales lift in one region the highest ever!



Newspaper and online

AWARENESS OF SPREADABLE BUTTER	+16%
TRIAL OF SPREADABLE BUTTER	+9%
LIKELIHOOD OF FUTURE USAGE	+20%
GAY LEA BRANDING	+14% (+23% online*)

^{*}Online the branding in the ad was stronger and the results proved even better.







Do you work? What do you do? What are you really good at?











"Newspapers work. It's as simple as that. We know it works. Newspapers draw attention. There is an immediacy to it. There's credibility to it. It's still a very, very good retail medium...the best match for newspaper advertising are situations where a print ad can help seal a sale."

Sunni BootPresident and CEOZenithOptimedia Canada

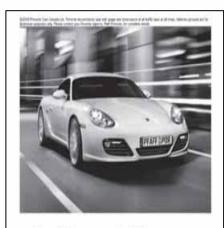








Attention



Goes all the way on a first date.

the intentions are clear. The available studite-clutch Function Cospokusping SPKS privation swamers, exclusives and studies without traction internation. While inchesting horizonare and inducing fael consumption. Don't on anything half wile.

The new Cayman. Now available.

DL7LL

Pfaff Porsche

IIII Avits Park Circle Windbridge, Cetteris LAI, MIII. www.pfaffporoche.com Dissersors House. Monday Trunday: MAII to: NYM Friday Seed to 67% Salanday VAM to: SYM Salanday VAM to: SYM



Advertiser:

Porsche

Headline:

Goes all the way on a first date.





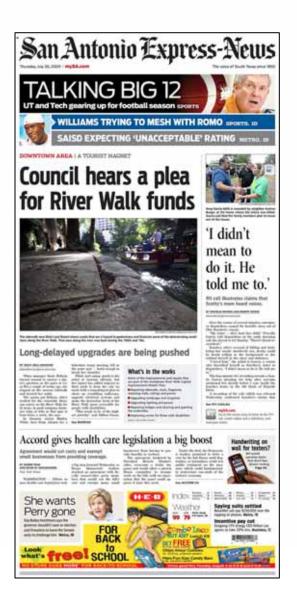




Attention – Front page







Attention – Placement





Attention – Be unique



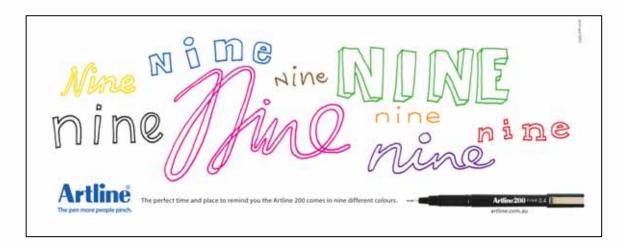








Immediacy - Specific date



Brand:

Artline markers

Challenge:

Promote their 9 different colours

Solution:

Ran in newspapers on page 9 on 9/9/09









Immediacy – Responding to the news



Copy:

Someone needs a Ryobi hedge trimmer for Christmas



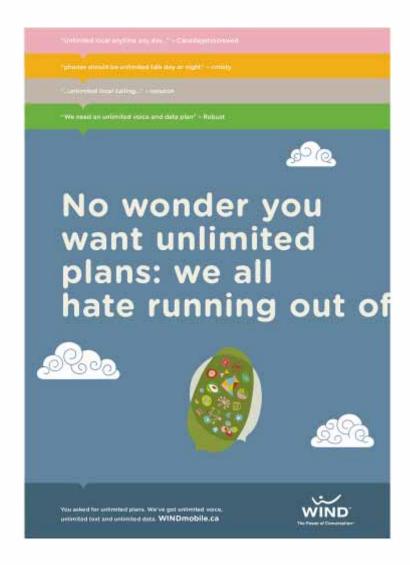








Credibility





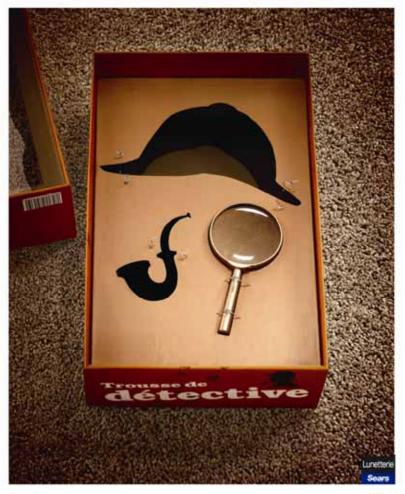








Retail

















Retail - Local





Of those adults who did <u>not read</u> a newspaper in the past week, <u>36% USED</u> a newspaper during that same week. Usage included checking sales in local stores.

Scarborough 2008; MORI 2009



Seal the sale



Copy: It's better when you plan it yourself.













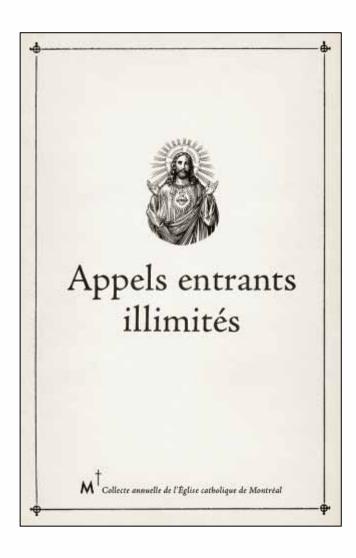








Call to action



Headline: Unlimited incoming calls









Interactive















Interactive



Brand:

United Nations

Challenge:

To make the issues come alive.

Solution:

Text picture of mouth. Receive a call back to hear the real story of featured person.











Interactive

QR codes

















How do I know this will work out?
What's your track record?
I am just shopping around right now but I'd love a peek into how fulfilling this relationship could be?









"Shop window"

Primary Medium for Checking Advertising		
Medium	% of Respondents	
Newspapers	41%	
Internet	21%	
Direct mail	14%	
Television	8%	
Catalogues	6%	
Magazines	3%	
Radio	2%	
None of these	5%	
Source: MORI Research/NAA, July 2009; Center for Media Research, "Newspapers Still Send Consumers To The Store", August 10, 2009		











Deliver Results

"Advertisers say the **printed** version of **newspapers** remains among **the most effective media** for meeting that objective (return on investment).

'We see it works. We are able to track results,' said Penny Stevens, president of Toronto-based media buyer Media Experts."









ROI

BrandScience analyzed 400 retail brand case studies

Millount Sport Wichia Daios increas	Amount spent	<u>Media</u>	Sales increase
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For every £1 Newspaper £6.23

For every £1 TV £3.57

For every £1 Outdoor £3.57

For every £1 Online £2.23









Automotive





Brand: Audi

Challenge:

- Target 40+ professionals
- Position SUV as sexy

Solution:

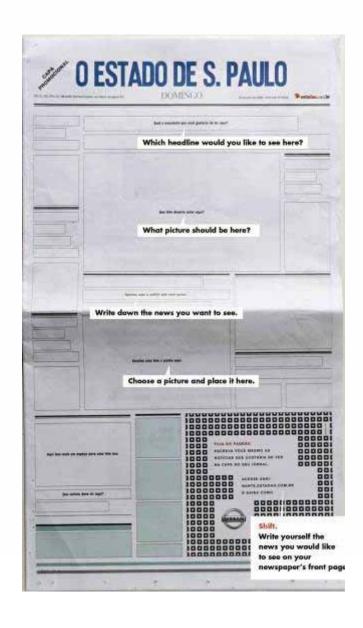
 Newspaper+online+ outdoor+mag.

Results:

- Industry -17%, Audi +11%
- Sold 50% above targets
- Brand measures increased dramatically



Automotive – Non-traditional



Brand: Nissan, Brazil

Challenge:

- Developing its presence
- Entrench brand belief 'Shift'

Solution:

- Newspaper buyer source
- Front page blank readers upload stories & pictures.
- Next Sunday, personalized newspaper delivered

Results:

Nissan's brand familiarity doubled





Travel

Brand: Canadian Tourism Commission Challenge:

 To sell stay-cation to keep vacation dollars in Canada

Solution:

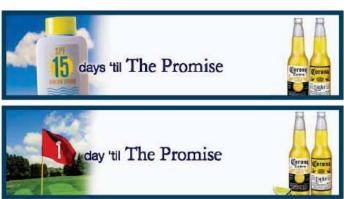
- Highlight Canadian undiscovered travel experiences
- Kick-off with newspapers then TV both drive to site

Results:

- 450,000 site visitors
- 2.2 million page views (well over industry averages)
- 4 weeks after launch 22% of Canadians surveyed booked/taken trip in Canada



Beer











FRONT PAGE WITH GATEFOLD

INSIDE FRONT PAGE

INCIDE BACK PACE

OUTSIDE BACK PAGE

Brand: Corona

Challenge:

- Target the up market
- Stand out at beginning of key season and generate sales

Solution:

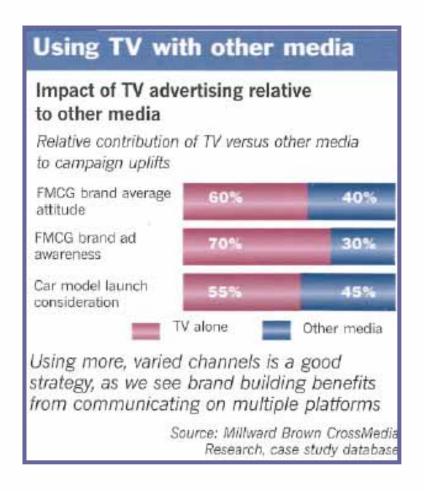
- Newspaper & their sites (with radio on launch week)
- Teasers
- Launch: first day of summer with high impact gatefolds

Results:

After gatefolds ran, sales +18%

- the highest ever weekly sales!













Millward Brown analysis of 32 cross-media studies

- TV: Has a strong ability to build brand awareness
- Online: Ads perform in a similar way to TV
- Print: is more relatively more likely to increase brand favourability and purchase intent

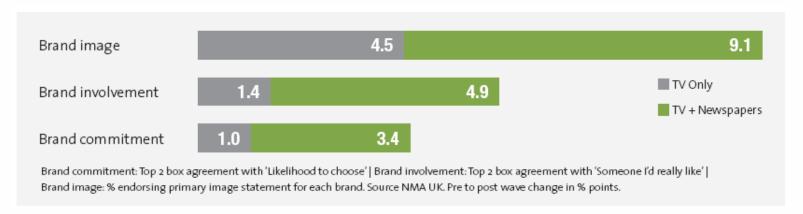








Newspapers are proven to be compatible with TV, multiplying brand effectiveness for food advertisers















Brand: Nescafe Instant Green coffee **Challenge**:

Launch new product

Solution:

- Newspaper + TV proven to work
- TV newsworthy programs
- Newspaper news, health, food

Results:

- Brand equity: 75% (vs. 62% TV)
- Delivered key messages of:

Taste: +59% vs TV only

Quality: +41% vs TV only

Emotive cues: +44% vs TV only

Trial was 23% above plan



Business-to-Business



Brand: The BrainStorm Group

Challenge:

- Build awareness in tough market
- Increase visits to (new) website

Solution:

Full-page newspaper ad

Results:

- Garnered 1,600 new visitors to the site the day the ad ran
- Would do it again!











What is your vision for the future?
Where do you see yourself in 5 years?









Future

- Paid content?
- Hyper local content
- User generated content
- Video content & advertising
- Print outsourcing
- More colour
- More free newspapers?
- Smaller?
- Niche and/or customizable
- Apps
- Increased use of technology











Personalized newspaper



Niuu

- Launched in Berlin
- Choose sections from 20 newspapers
- -Order due by 2pm
- Individualized editions are home delivered
- -Cost: €1.80 (€1.20 students)

Kooperationspartner







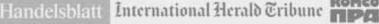
DER TAGESSPIEGEL

















PBK daily The New York Times The Washington Times



Specialized newspapers



Brand:

Movistar with Metro's Publimetro

Situation:

- Chile's 635K blind community
- No newspaper or magazines

Solution:

Monthly publication in braille









Vertical Newspaper?

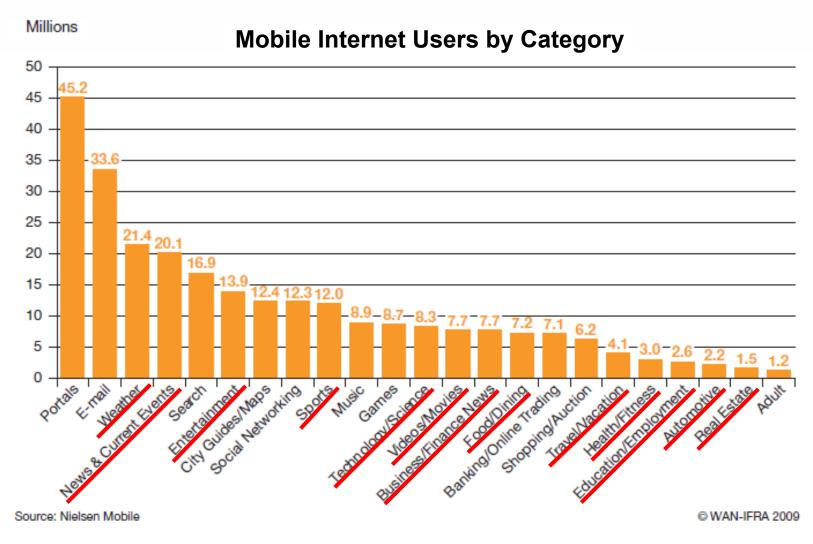






















What is it:

Light, electronic device for reading books, newspapers, textbooks (retail: \$260-850)

Manufacturers:

Amazon's Kindle (A&D), E Barnes & Noble's Nook (B), Sony Reader (C), Apple iPad (E)

Opportunity:

Students, women Sales to double in 2010*





E







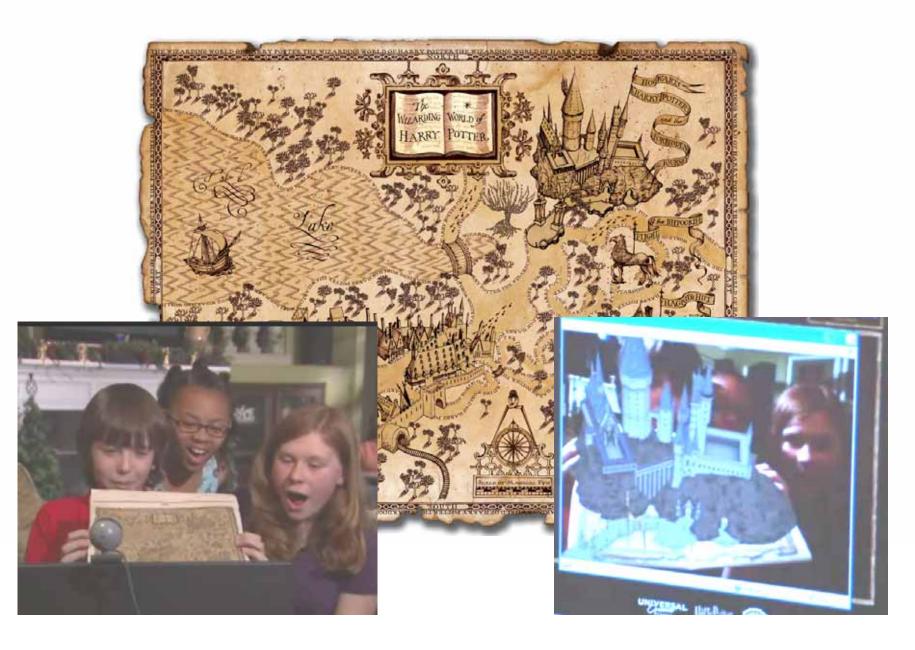














Gesture-based interface











Finally, do you have a personal philosophy?









Live Long!

On June 19, 2009, Tomoji Tanabe, the world's oldest man died in Japan. He was 113.

He drank milk and read a newspaper everyday!









Be Happy!

What do happy people do? Read a newspaper!

And they read the paper at significant rates through all demographic categories.









I think we are perfect fit



















