



Community Newspapers Drive Results *Automotive*

2017



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Community Newspapers Drive Results

Automotive

Study Objectives



- Profile new vehicle buyers*
- Identify new vehicle* path-to-purchase
- Clarify the role of the Internet
- Analyze media influence at each stage
 - Newspaper and search engine usage
 - Media that drive traffic to automotive websites
- Explore the role of newspapers
 - Multi platform readership
 - Action taken as a result of advertising exposure
 - Readership of automotive advertising



Study Details

Study Timing

December 2016

Online Panel

UThink

National Scope

78% English / 22% French

Study Management

Totum Research

Margin of Error

±2.0% at the 95%
confidence level



2,403 Canadians surveyed
1,065 printed and/or digital community newspaper readers;
495 buyers of new vehicles in past 2 years

Nationally Representative Sample

Men 50%, Women 50%
18-34: 29%, 35-49: 26%, 50-64: 27%, 65+ 18%
West 31%, Ontario 39%, Quebec 23%, Atlantic 7%

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New Vehicle Buyers*





New Vehicle Buyers*

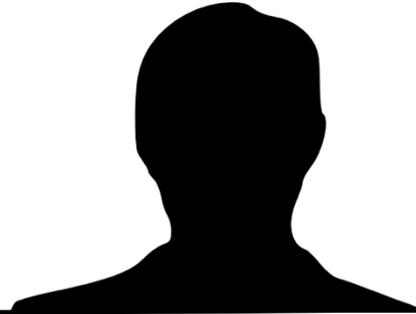
- New Vehicle Buyers* are found in multiple demographic targets:



- They are surrounded by online and traditional media, every day.
- The Internet is an integral part of every major purchase today.



Who is the New Vehicle Buyer*?



MALE
53%



MARRIED
73%



AGE 35-64
53%
Millennials (24%)
Boomers (31%)



EMPLOYED
64%
as well as Retired
(28%)



INFLUENCERS
47%



**AVERAGE
HOUSEHOLD
INCOME**
\$94,351
(22% higher
than average
Canadian
adult 18+)

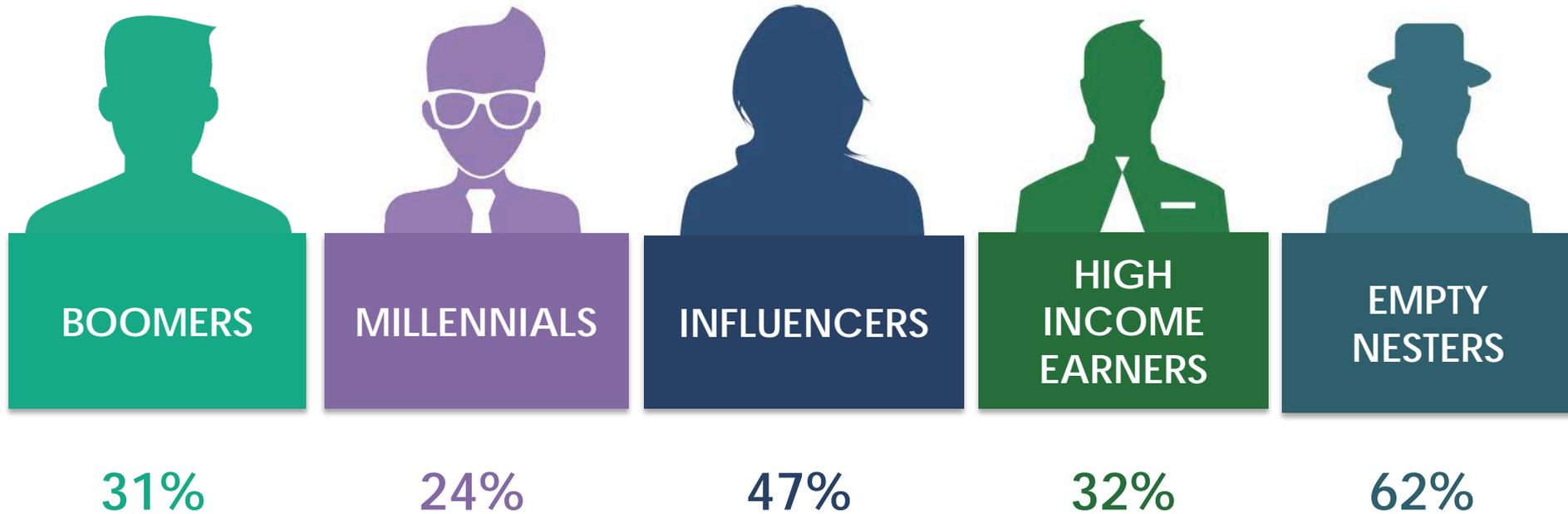


**NO
CHILDREN IN
HOUSEHOLD**
62%

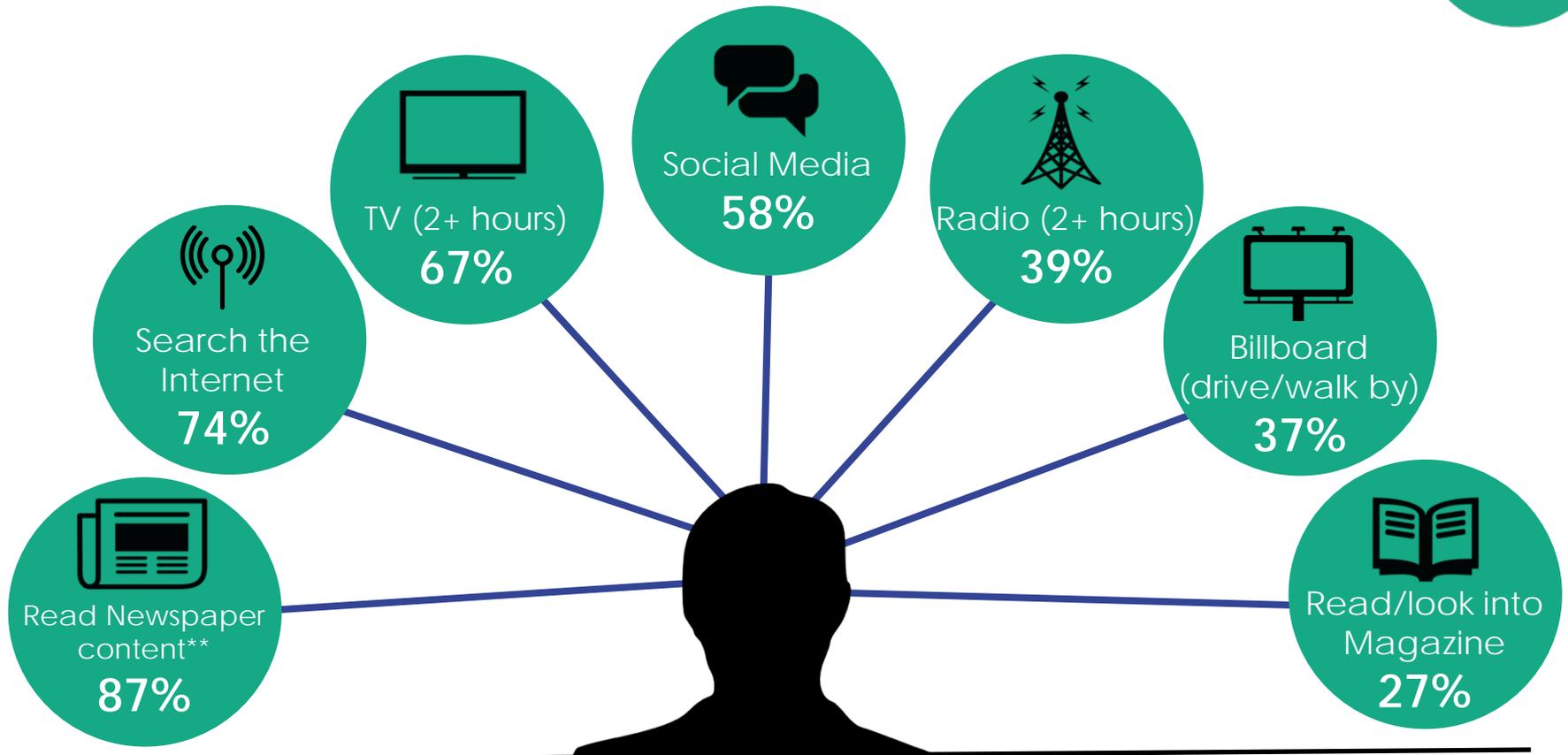


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New Vehicle Buyers* are Diverse



Surrounded by Media Daily

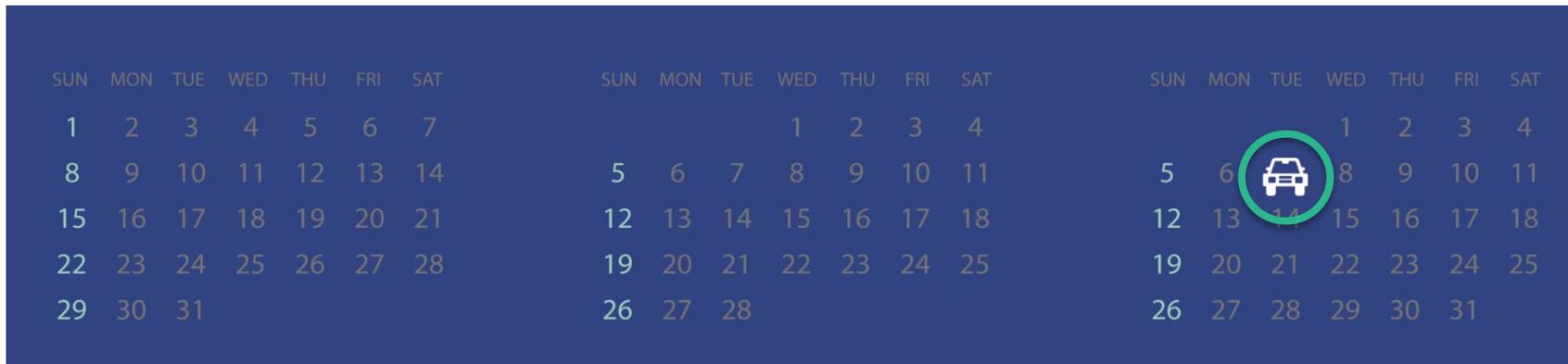




New Vehicle Path-to-Purchase



New Vehicle Buyers - Purchase Cycle



New Vehicle Buyers* are in the market for an average of **2.3 months**

- Less than one month 46%
- 1-3 months 36%

82% of New Vehicle Buyers* are in and **out of the market in less than 3 months**. That is all the time you have to influence them to purchase from you.





New Vehicle Path-to-Purchase

New Vehicle Buyers* move through various stages on their path-to-purchase.

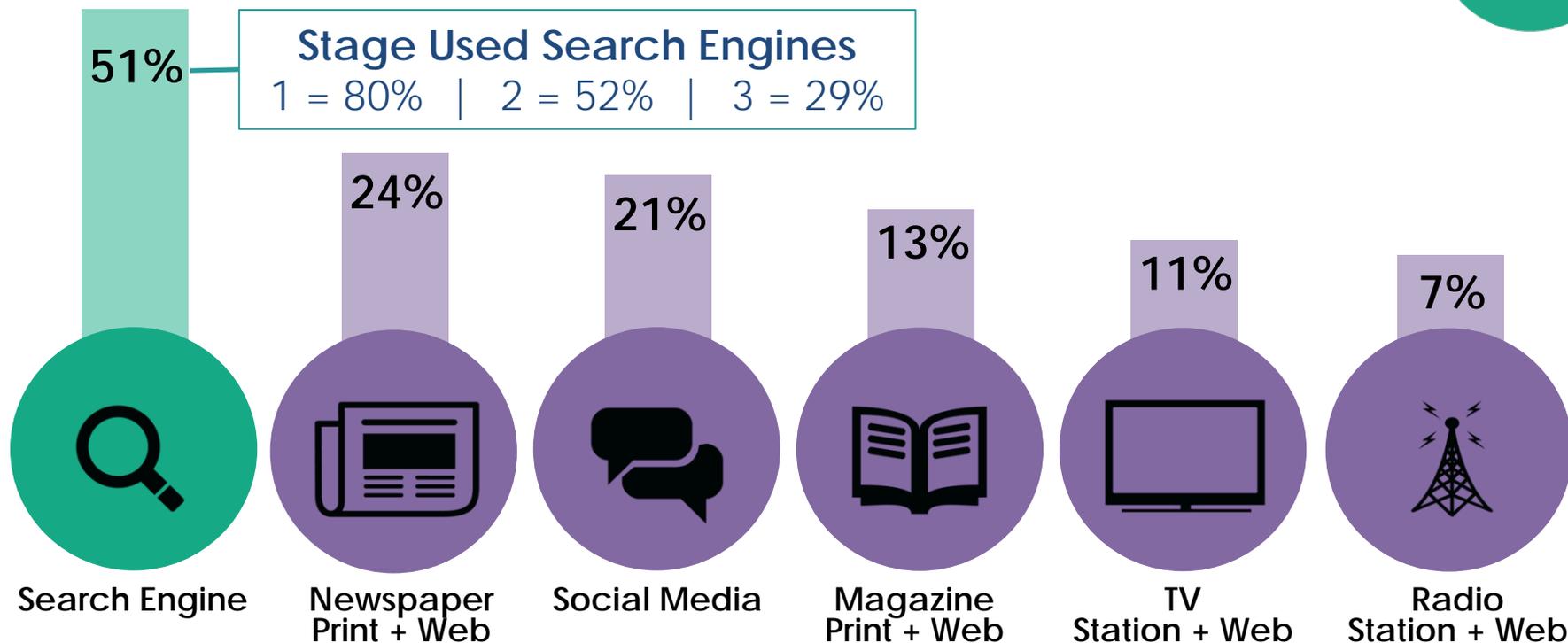




The Internet and the New Vehicle Path-to-Purchase



Used to Source Websites at Any Stage



20% don't use the Internet at any stage



Media Influence and the New Vehicle Path-to-Purchase





Media Influence



Media



is communication that reaches large numbers of people, such as television, newspapers, magazines, radio and the internet.



Influence



is the power to change or affect someone/something or to cause changes without directly forcing them to happen.



Media Influence

Mass media effects on individual or audience thought, attitudes and behaviour.





Vehicle Path-to-Purchase

1



STAGE 1

Thinking About Buying/Replacing Vehicle





New Vehicle Path-to-Purchase STAGE 1



Prospects start to notice automotive media and messaging. Important considerations in this stage are branding and general auto information.



60% of New Vehicle Buyers* rate Newspapers useful for general automotive information.





New Vehicle Path-to-Purchase

STAGE 1- Internet Use



Search Engine use is highest in Stage 1



80%
of New Vehicle Buyers*
use Search Engines to find
automotive websites



The majority of this Search
Engine use is **Google**



20% don't use the Internet at any stage





New Vehicle Path-to-Purchase STAGE 1- Automotive Websites

Media that drive traffic:



29%
Newspapers



53%
visit Automotive
Manufacturer sites

23% Search Engines
14% Magazines

39% visit Brand/Model sites
32% visit Dealer sites

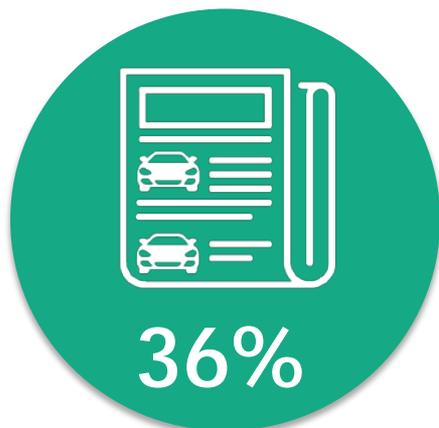


25% of New Vehicle Buyers* never visit
automotive websites

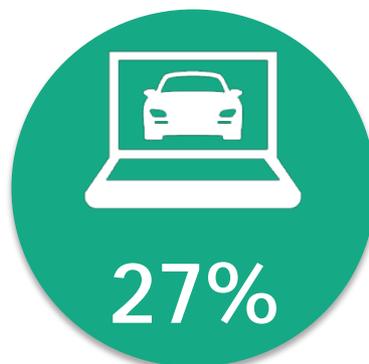




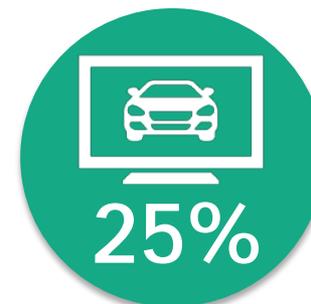
New Vehicle Path-to-Purchase STAGE 1- Media Influence



Newspapers
(23% Print/17% Digital)



Websites*



Television
(19% Stations/8% Digital)

Magazines 19% (10% Print/10% Digital)

Autotrader/Kijiji 18%

Social Media 16%

Radio 10% (7% Stations/2% Digital)



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Vehicle Path-to-Purchase





New Vehicle Path-to-Purchase STAGE 2



Potential buyers research manufacturers/brands/ models, read reviews and evaluate features. Less than a quarter will buy the first vehicle researched.



Half of New Vehicle Buyers* use newspapers to find special pricing/financing offers (54%) and specific information on manufacturers/models (49%).



Four of ten find newspapers useful for reviews, deciding the model and finding photos.





New Vehicle Path-to-Purchase STAGE 2- Internet Use



Search Engine use drops in Stage 2



52%
of New Vehicle Buyers*
use Search Engines to find
automotive websites



20% don't use the Internet at any stage





New Vehicle Path-to-Purchase STAGE 2- Automotive Websites



Media that drive traffic:



29%
Newspapers



40%
visit Brand/Model
Sites

27% Search Engines
22% Magazines

30% visit Automotive Manufacturer Sites
30% visit Dealer sites



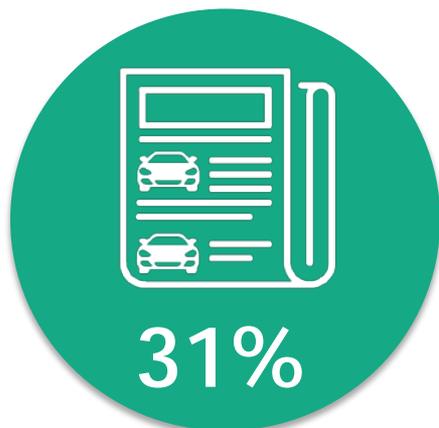
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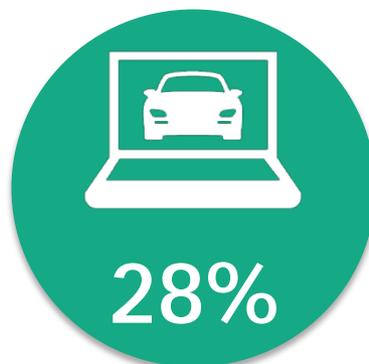


New Vehicle Path-to-Purchase

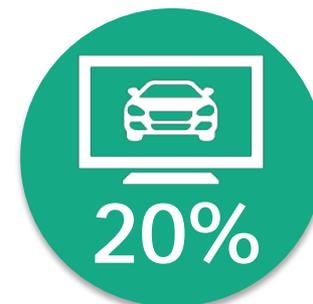
STAGE 2- Media Influence



Newspapers
(19% Print/16% Digital)



Websites*



Television
(14% Stations/9% Digital)

Magazines 15% (9% Print/8% Digital)

Autotrader/Kijiji 15%

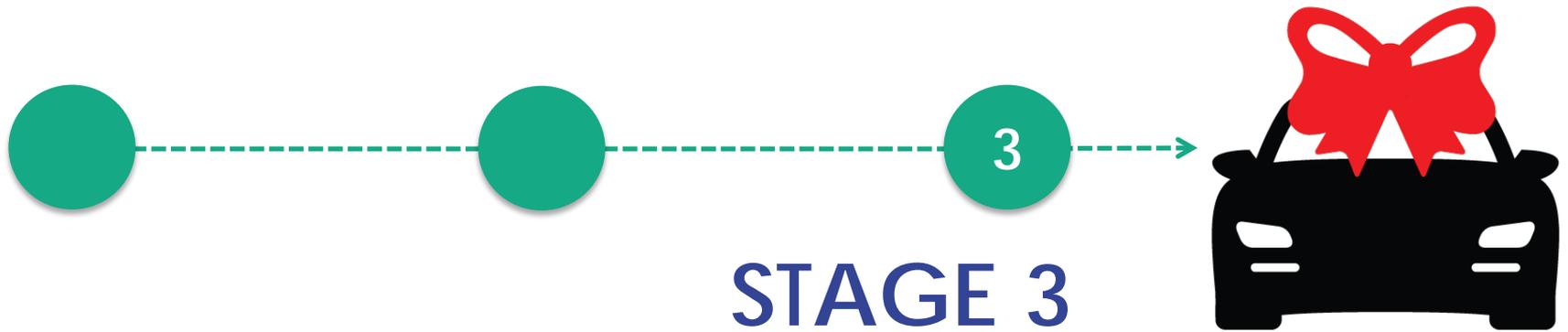
Social Media 14%

Radio 6% (4% Stations/2% Digital)



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Vehicle Path-to-Purchase



STAGE 3

Ready to Make
Purchase Decision





New Vehicle Path-to-Purchase

STAGE 3



After researching options prospects are ready to make their purchase decision. Consumers are looking for pricing, special offers and where to buy their vehicle.



Half of New Vehicle Buyers* use newspapers for comparing prices (55%) and deciding where to buy/lease from (46%).

Four in ten (38%) find newspapers useful in the final purchase decision.





New Vehicle Path-to-Purchase STAGE 3- Internet Use



Search Engine use lowest in Stage 3



29%
of New Vehicle Buyers* use
Search Engines to find
automotive websites



20% don't use the Internet at any stage





New Vehicle Path-to-Purchase STAGE 3- Automotive Websites



Media that drive traffic:



24%
Newspapers



34%
visit Dealer sites

24% Search Engines
16% Television

22% visit Brand/Model sites
18% visit Automotive Manufacturer Sites



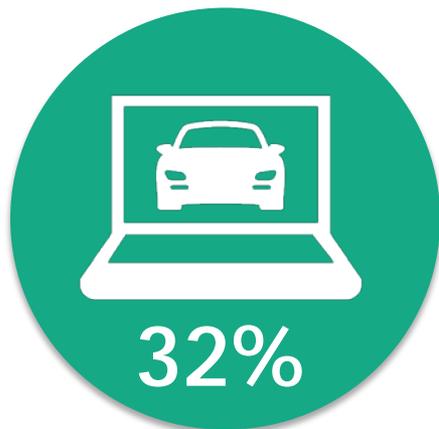
25% of New Vehicle Buyers* never visit
automotive websites





New Vehicle Path-to-Purchase

STAGE 3- Media Influence

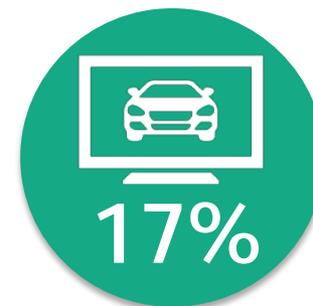


Websites*



Newspapers

(14% Print/13% Digital)



Television

(13% Stations/5% Digital)

Social Media 15%

Magazines 12% (6% Print/8% Digital)

Autotrader/Kijiji 12%

Radio 7% (5% Stations/2% Digital)



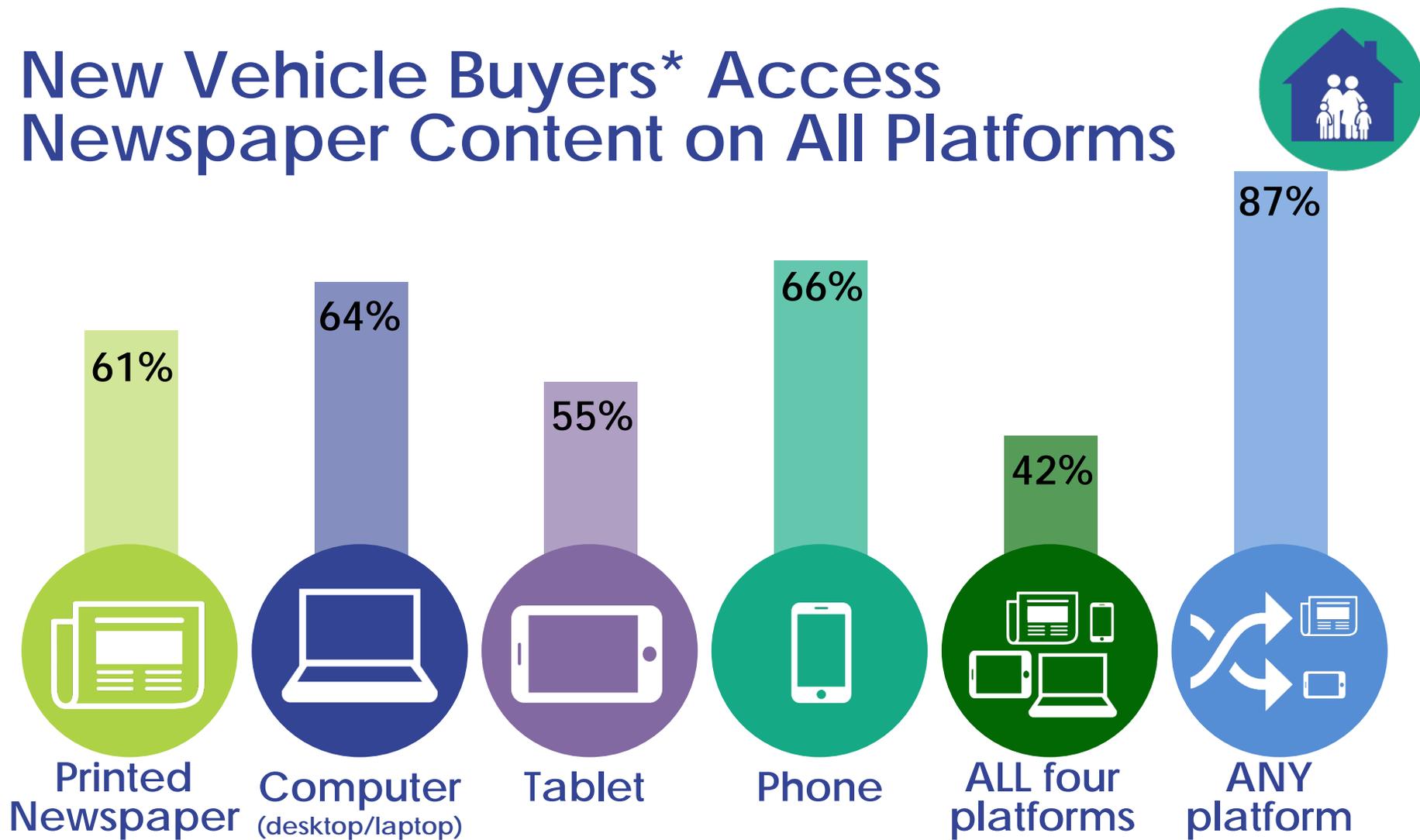
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Newspapers and the New Vehicle Path-to-Purchase



New Vehicle Buyers* Access Newspaper Content on All Platforms



Printed Newspaper

Computer (desktop/laptop)

Tablet

Phone

ALL four platforms

ANY platform



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Action Taken



Community newspaper readers respond to advertising with action.

- 82% became aware of a product, service or sale.
- 75% visited a store in-person or online.



Readers who are New Vehicle Buyers* index above average for:

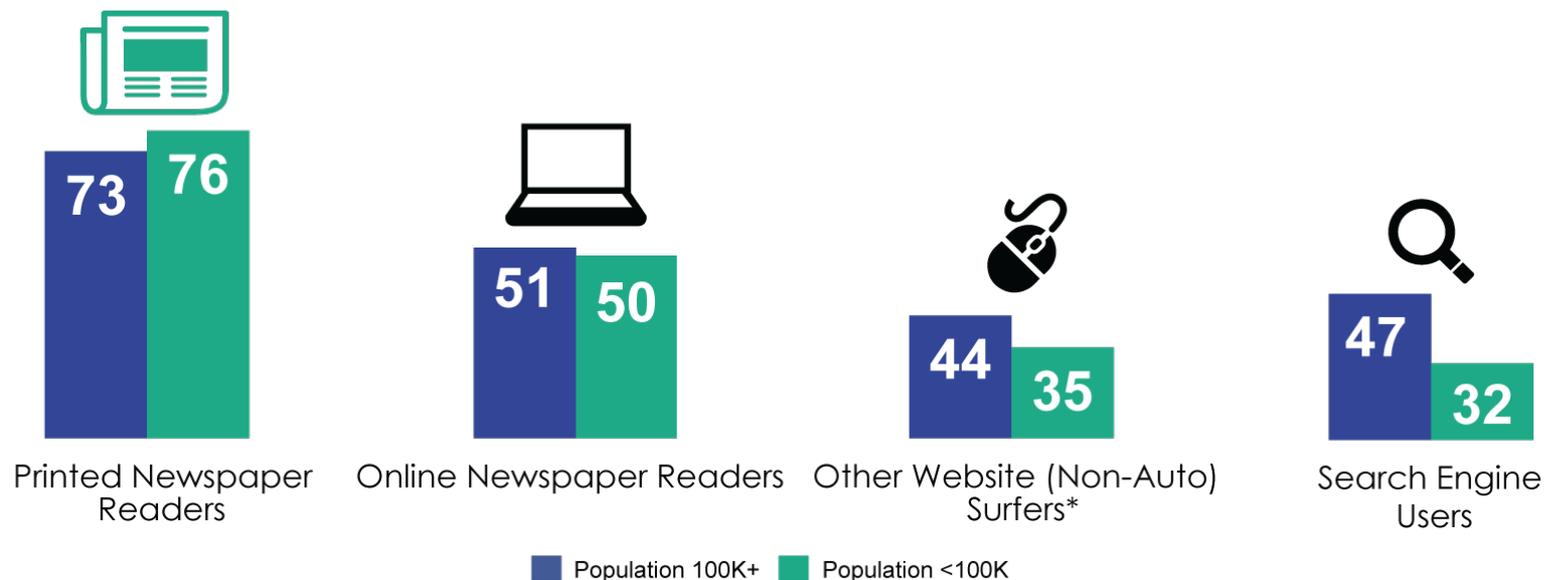
- Buying a product or service (113)
- Looking for more offline information (112)



Vehicle Ads in Newspapers are Read



3 OF 4 PRINTED COMMUNITY NEWSPAPER READERS NOTICE THE VEHICLE ADS IN THEIR PAPER



■ Population 100K+ ■ Population <100K

Community Newspapers Drive Results for Vehicle Sales



Printed community newspaper readers notice vehicle advertising in their papers.

- Newspapers and their websites are influential media at all 3 stages of the automotive purchase cycle;
- Community newspaper readers respond to advertising with action; and
- Readers who are New Vehicle Buyers* index above average for buying a product or service.



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