

NEWSPAPER MEDIA DRIVE AUTOMOTIVE SALES 2017



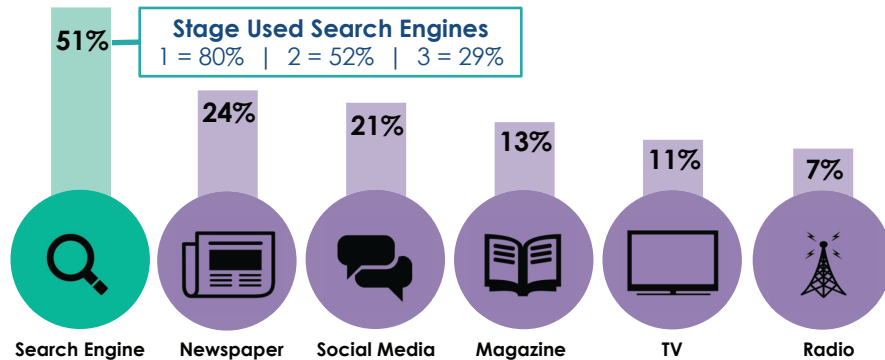
New Vehicle Buyers[^] are in the market for an average of **2.3 months**.



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.

THE INTERNET AND THE NEW VEHICLE PATH-TO-PURCHASE

Used to Find Automotive Websites



ACTION TAKEN

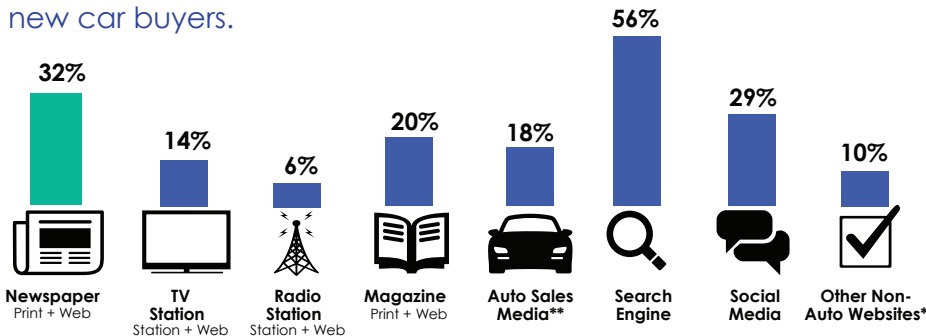


New Vehicle Buyers[^] respond to newspaper advertising with action:

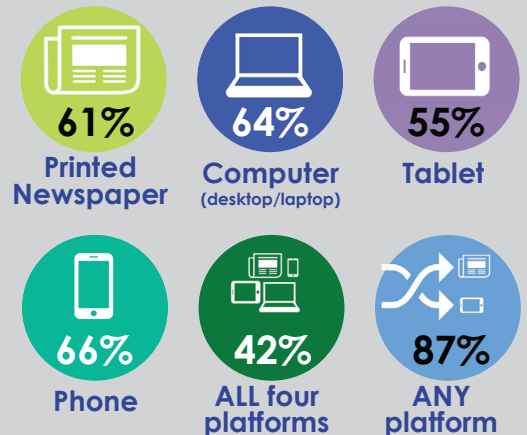
- 82% became aware of a product, service or sale
- 77% visited a store in-person or online
- 81% bought a product or service
- 69% went online to find more information about a product or service
- 65% looked offline for more information about an advertised product or service
- 61% referred an ad to someone else

USED TO SOURCE WEBSITES AT ANY STAGE

Search Engines dominate in leading new car buyers to appropriate websites, but newspapers are used by a third of new car buyers.



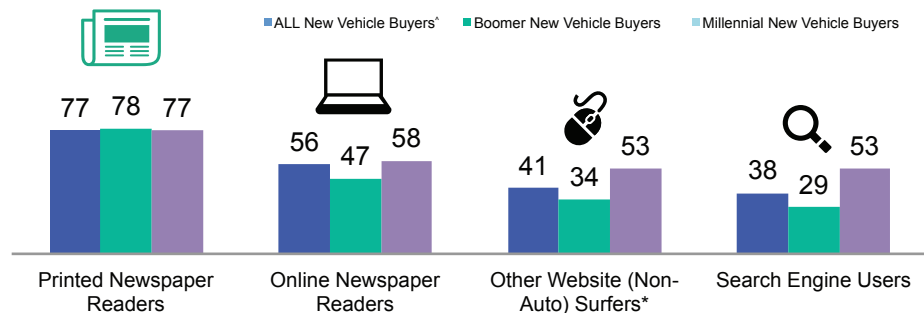
NEW VEHICLE BUYERS[^] ACCESS NEWSPAPER CONTENT ACROSS ALL PLATFORMS



VEHICLE ADS IN NEWSPAPERS ARE READ



3 OUT OF 4 NEW VEHICLE BUYERS[^] NOTICE THE AUTOMOTIVE ADS IN THEIR PRINTED NEWSPAPERS.



For more information, go to www.newsmediacanada.ca

Source: Totum Research, December 2016

[^] past 2 years

* Websites excluding Newspaper and Auto Manufacturer, Model and Retailer sites ** Autotrader, Kijiji etc.

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NEW VEHICLE PATH-TO-PURCHASE

New Vehicle Buyers[^] move through various stages on their path-to-purchase.

1 THINKING ABOUT BUYING / REPLACING VEHICLE

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.



Search Engine use is highest in Stage 1 - The majority of this Search Engine use is Google.



80% of New Vehicle Buyers[^] use Search Engines to find automotive websites.

2 RESEARCHING OPTIONS

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%).



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



52% of New Vehicle Buyers[^] use Search Engines to find automotive websites.

3 READY TO MAKE PURCHASE DECISION

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%).



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



29% of New Vehicle Buyers[^] use Search Engines to find automotive websites.

MEDIA THAT DRIVE TRAFFIC TO AUTOMOTIVE WEBSITES



29%
Newspapers



53%
visit Automotive
Manufacturer sites



29%
Newspapers



40%
visit Brand/
Model Sites

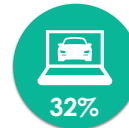
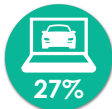


24%
Newspapers



34%
visit Dealer sites

MEDIA INFLUENCE = MASS MEDIA EFFECTS ON INDIVIDUAL OR AUDIENCE THOUGHT, ATTITUDES AND BEHAVIOUR.



20% don't use the Internet at any stage



25% of New Vehicle Buyers never visit automotive websites (manufacturer, brand/model, dealer)

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
 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%

For more information, go to www.newsmediacanada.ca