

Readership IN PERSPECTIVE

A look into the reading habits of Canadian Truckers

A SURVEY YOU CAN BELIEVE

For the first time in my 42 years in the trucking magazine business, a truly 100% third-party study has been published on the reach and readership of the magazines serving the Canadian trucking industry.

Other surveys might be the result of e-mail blasts, mailouts, or telemarketing surveys conducted over a proprietary list, but not this study. This is solid, credible research that you can believe.

One of the challenges that has inhibited comparative studies like this in the past was the difficulty in obtaining independent, third-party lists of heavy trucks operators. There are thousands of private fleets that own and operate heavy trucks, and an estimated 30-40,000 over-the-road owner-operators, as well as thousands more dump truckers and cement mixer operators. These companies and individuals do not show up on any single list or SIC code for heavy truck owners.

The list of truck operators chosen for this survey represents well over 50% of the heavy trucks and more than 60% of the trailers operated in Canada. A random sample was drawn from the list of members of the Canadian Trucking Alliance (CTA), clearly a truly independent list. The membership of CTA includes virtually every big for-hire carrier in Canada, as well as a surprising number of private fleets, small fleets, and owner operators. In total, there are some 4,500 member companies that belong to the seven provincial trucking associations. Together they comprise the entire membership of CTA, Canada's national voice of the trucking industry.



Jim Glionna
President
Newcom Business Media Inc.

TODAY'S TRUCKING... THE FIRST CHOICE OF CANADA'S TOP TRUCKING INDUSTRY DECISION MAKERS

You don't have to read between the lines in this survey to see that there is one magazine that stands apart as the best way to reach Canada's trucking community. From top-level executives to people in the shop to owner-operators, in the east or in the west, at big fleets and small, there's only one sure-fire way to get through to them all.

That's Today's Trucking.

Yes, there's competition, but Today's Trucking leadership is clear. In fact, Today's Trucking is the only publication you need to carry your advertising message to market. A claim borne out by the numbers you'll see in the next few pages.

At the very least, Today's Trucking has to be considered your base buy.

Respondents seem to agree. Asked which of four surveyed magazines they would choose if only one were available, they named Today's Trucking. Whether categorized by region, job function, or fleet size, their preference was the same.

It's no coincidence, because trucking industry decision-makers are a discerning group with little patience for sloppy or shallow reporting. They know a credible thing when they see it so that's where they turn to be informed. This survey shows that a strong majority of respondents believe and trust Today's Trucking the most.

Things have been that way for more than two decades, and as Today's Trucking approaches its 25th anniversary in 2012, it isn't about to change.

Preferred by most, respected by most, Today's Trucking is your #1 route to reaching Canada's \$65 billion trucking industry.



Joe Glionna
Publisher, Today's Trucking Magazine

RESEARCH COMPANY'S STATEMENT

Background

Most research studies conducted on business publications focus on profiling the audience of the publication that sponsors the research. However, these surveys generally do little to assist marketers and their advertising agencies in their media planning process.

This is not the case here. Newcom, a publisher of a number of Canadian business-to-business publications worked with several well-known independent suppliers to conduct this survey.

An independent list was used to draw the sample, (thereby eliminating the bias of a publication using its own list), a third-party telemarketing company was used to collect the data, and all responses were sent directly to Starch Research, a leading Canadian media and marketing research provider.

In short, Newcom underwrote the cost of this study but had no involvement in any aspect of the research process.

Objectives

- To determine the extent to which each of four audited English language magazines serving the Canadian trucking industry reach and are read by the buyers in this market.
- To uncover current buying trends of truck operators with specific reference to their plans on buying heavy-duty vehicles.

Methodology

The sample was drawn from the approximately 4,500 members who comprise the Canadian Trucking Alliance, (CTA). The list of names was

provided to Circulation Solutions, an independent telemarketing house. Calling took place between July 14 and August 23rd, 2011. Respondents were qualified as operating medium or heavy duty trucks and having purchase influence on the selection of trucks and trailers. In total, 614 interviews were completed. The margin of error on this sample size is $\pm 4.0\%$, 19 times in 20. Completed questionnaires were sent directly to Starch Research Services Limited in Toronto (www.starchresearch.com).

Starch Research reviewed the questionnaires, edited them for completeness and entered the data. Starch provided Newcom with detailed tabulations of the results.

Summary

Starch Research was involved in questionnaire design, and was responsible for all aspects of editing, coding, tabulating and reporting.

Starch Research Services Limited is a corporate member of the Marketing Research & Intelligence Association (MRIA) and adheres to its code of ethics and professional standards.



Brian Hickey, CMRP
President

STARCH | RESEARCH

2011-2012 Buying Intentions



BUYING INTENTIONS



Do you plan to buy or lease a class 8 vehicle?

Base A: Respondents who operate at least one Class 8 vehicle - 546

Base B: Respondents who answered yes to buying or leasing a Class 8 vehicle - 347

By Geographic Region

	Base A	Plan to Buy or Lease	Base B	Plan to Buy	Plan to Lease
All Canada	(546)	63.6%	(347)	78.7%	25.7%
Canada West	(180)	60.2%	(108)	74.1%	30.6%
Ontario	(235)	64.3%	(151)	80.8%	21.2%
Canada East	(131)	66.9%	(87)	80.5%	26.4%

By Fleet Size

	Base A	Plan to Buy or Lease	Base B	Plan to Buy	Plan to Lease
1-9 vehicles	(121)	43.8%	(53)	69.8%	32.1%
10-99 vehicles	(292)	66.2%	(193)	82.4%	21.8%
100+ vehicles	(133)	76.0%	(101)	76.2%	29.7%

By Job Description

	Base A	Plan to Buy or Lease	Base B	Plan to Buy	Plan to Lease
Top Management / Accounting & Finance	(268)	70.6%	(189)	82.0%	23.8%
Operations / Maintenance	(177)	58.8%	(104)	78.9%	25.0%
Owner Operator	(77)	45.5%	(35)	60.0%	40.0%
Other	(24)	79.2%	(19)	79.0%	21.1%

Optimism is strong, especially among large fleets. They're buying.

There are clear intentions to buy or lease new class-8 trucks across the country. Perhaps surprisingly, that's most true in eastern Canada, least so in the west. That disparity may be misleading, however, because it's likely that western truck operators have been buying more consistently in recent years, while easterners are modernizing their fleets after having delayed purchases in the last decade. Predictably, purchase plans are weakest amongst small fleets and owner-operators. The latter have been especially hard hit by the economic downturn and credit has not been as readily available as in years past. Notice that owner-operators are much more likely to lease than the fleets.



TYPES OF VEHICLES BEING PURCHASED/LEASED

What kind of heavy-duty vehicle do you plan to buy or lease... and when do you expect to start buying?

All respondents who operate GVW Class 8 heavy-duty trucks - 546

By Region

	Base	A New Truck	A New Tractor	A New Trailer	A Used Truck	A Used Tractor	A Used Trailer
All Canada	(546)	46.3%	44.9%	41.9%	9.3%	9.2%	8.6%
Canada West	(180)	39.4%	37.8%	33.9%	11.7%	7.7%	8.9%
Ontario	(235)	51.9%	51.1%	47.7%	7.7%	9.2%	9.4%
Canada East	(131)	45.8%	43.5%	42.7%	9.2%	9.2%	7.6%

By Fleet Size

	Base	A New Truck	A New Tractor	A New Trailer	A Used Truck	A Used Tractor	A Used Trailer
1-9 vehicles	(121)	21.5%	22.3%	16.5%	12.4%	11.6%	10.7%
10-99 vehicles	(292)	48.0%	45.5%	43.8%	9.2%	9.2%	9.2%
100+ vehicles	(133)	65.4%	63.9%	60.9%	6.8%	6.8%	6.0%

Time Frame

	A New Truck	A New Tractor	A New Trailer	A Used Truck	A Used Tractor	A Used Trailer
Within Next 3 months	38.3%	38.5%	35.4%	29.4%	31.6%	31.0%
Within Next 6 months	37.6%	35.6%	37.6%	39.2%	41.1%	45.7%
Within Next 12 months	19.4%	20.5%	21.8%	25.5%	25.6%	23.3%
Over 1 year	3.2%	3.8%	3.9%	5.9%	0.0%	0.0%
Not Sure	1.6%	1.6%	1.3%	0.0%	1.7%	0.0%

Purchasing plans are strongest in Ontario

The key takeaway here is that a whopping 95% of Canadian truckers plan to buy or lease a new truck, tractor, or trailer within the next year. And nearly 75% of them intend to do so in the next six months. While trends are impossible to pin down in this economic climate, those are very positive figures. The intention to acquire used tractors and trailers within a year is even stronger at 100% or nearly so, though the challenge will be finding quality used equipment to buy.

Readership, Credibility, Preference and "Pass-Along"

of audited English language
trucking magazines in Canada





READERSHIP

Which of the following magazines have you read or looked into in the past six months?

Base: All respondents - 614

By Geographic Region

	Base	Today's Trucking	Truck News	Motor Truck	Truck West
All Canada	(614)	86.6%	76.5%	53.2%	28.2%
Canada West	(209)	80.3%	63.6%	43.9%	55.6%
Ontario	(258)	92.6%	86.0%	61.4%	14.9%
Canada East	(147)	85.0%	78.1%	51.5%	12.5%

By Job Function

	Base	Today's Trucking	Truck News	Motor Truck	Truck West
Top Management / Accounting & Finance	(295)	90.8%	79.6%	60.2%	33.2%
Operations/Maintenance Management	(200)	84.3%	76.8%	45.8%	18.4%
Owner Operator	(91)	75.9%	65.5%	49.3%	37.8%
Other	(27)	93.2%	77.8%	44.1%	12.9%

By Fleet Size

	Base	Today's Trucking	Truck News	Motor Truck	Truck West
1-9 trucks	(148)	72.1%	63.2%	42.0%	37.0%
10-99 trucks	(327)	91.0%	78.9%	55.2%	26.3%
100+ trucks	(139)	91.5%	85.0%	60.4%	23.1%

Nearly 90% of respondents read Today's Trucking, a sure-fire approach to Canadian truck operators.

Today's Trucking is clearly at the head of the pack no matter where you look. Perhaps even more interesting than Today's Trucking's dominance are two facts. **1)** Motor Truck (the so-called Fleet Executive magazine) is read by only 60% of top management and big fleets. Among all truckers, its readership is just over 50%. **2)** Truck West is read less than Truck News... in the West.



CREDIBILITY OF CONTENT

Of the magazines that you read or have looked into, which one magazine do you believe and trust the most?

Base: Respondents who indicated they read at least one of the magazines in the past 6 months - 583

By Geographic Region

	Base	Today's Trucking	Truck News	Motor Truck	Truck West	Don't Know Not Stated
All Canada	(583)	50.0%	31.0%	8.7%	5.8%	4.5%
Canada West	(192)	53.6%	17.7%	5.0%	17.7%	5.9%
Ontario	(251)	47.8%	37.3%	11.0%	0.0%	3.8%
Canada East	(140)	48.7%	38.2%	9.9%	0.0%	3.3%

By Job Function

	Base	Today's Trucking	Truck News	Motor Truck	Truck West	Don't Know Not Stated
Top Management / Accounting & Finance	(279)	50.2%	32.7%	8.0%	4.7%	4.4%
Operations/Maintenance Management	(193)	49.8%	33.3%	9.5%	4.1%	3.3%
Owner Operator	(85)	52.6%	17.5%	9.4%	14.3%	6.1%
Other	(26)	39.4%	41.3%	9.2%	3.3%	6.8%

By Fleet Size

	Base	Today's Trucking	Truck News	Motor Truck	Truck West	Don't Know Not Stated
1-9 trucks	(136)	44.3%	26.6%	8.1%	11.6%	9.4%
10-99 trucks	(312)	51.0%	32.2%	8.3%	5.6%	3.0%
100+ trucks	(135)	53.2%	33.0%	10.5%	0.6%	2.7%

When credibility is measured, Today's Trucking is truly dominant.

When it's believability and trust they want, the people who own, operate, and maintain trucks in Canada turn overwhelmingly to Today's Trucking. In the West the trust margin is 3 to 1 over the nearest other magazine. That's no accident, rather it's the result of consistently hard work by a very smart, very experienced editorial team that has always seen 'credibility' as priority number one. Note that in Western Canada, Truck News garnered the same number of 'trust' votes as Truck West. Motor Truck is essentially not in the picture here.



EXTENDED REACH

Of the magazines that you read or have looked into, which one magazine are you most likely to pass-along to others in your company?

Base: Respondents who indicated they read at least one of the magazines - 583

By Geographic Region

	Base	Today's Trucking	Truck News	Motor Truck	Truck West	Don't Know Not Stated
All Canada	(583)	49.2%	30.6%	9.3%	6.3%	4.5%
Canada West	(192)	51.8%	17.3%	5.9%	18.6%	6.4%
Ontario	(251)	48.3%	37.8%	10.5%	0.0%	3.3%
Canada East	(140)	47.4%	36.2%	11.8%	0.7%	3.9%

By Job Function

	Base	Today's Trucking	Truck News	Motor Truck	Truck West	Don't Know Not Stated
Top Management / Accounting & Finance	(279)	50.6%	30.7%	9.3%	4.7%	4.7%
Operations/Maintenance Management	(193)	49.2%	33.7%	9.4%	4.5%	3.1%
Owner Operator	(85)	50.2%	17.9%	9.4%	15.4%	7.2%
Other	(26)	32.3%	48.3%	9.2%	6.7%	3.5%

By Fleet Size

	Base	Today's Trucking	Truck News	Motor Truck	Truck West	Don't Know Not Stated
1-9 trucks	(136)	42.0%	27.0%	7.4%	12.9%	10.7%
10-99 trucks	(312)	50.5%	31.9%	9.4%	5.6%	2.7%
100+ trucks	(135)	53.7%	31.4%	11.2%	1.3%	2.4%

Today's Trucking penetrates the market best by far.

The 'pass-along' question is a useful measure of how a magazine's content is considered to be germane and thus worthy of sharing with co-workers. It also indicates how far a single magazine copy can penetrate the target audience beyond the original reader. Half of all readers surveyed identified Today's Trucking as the magazine most worthy of being passed along, comfortably more than any other magazines. That's especially true amongst owner-operators and in western Canada.



THE READERS CHOICE

If you could read only one of these magazines which one would it be?

Base: Respondents who indicated they read at least one of the magazines - 583

By Geographic Region

	Base	Today's Trucking	Truck News	Motor Truck	Truck West	Don't Know Not Stated
All Canada	(583)	49.4%	31.3%	8.2%	6.4%	4.6%
Canada West	(192)	51.8%	17.3%	4.5%	19.5%	6.8%
Ontario	(251)	48.3%	38.3%	10.0%	0.0%	3.3%
Canada East	(140)	48.0%	38.2%	9.9%	0.0%	3.9%

By Job Function

	Base	Today's Trucking	Truck News	Motor Truck	Truck West	Don't Know Not Stated
Top Management/ Accounting & Finance	(279)	50.3%	33.8%	6.9%	5.0%	4.0%
Operations/Maintenance Management	(193)	50.6%	31.3%	8.9%	5.0%	4.2%
Owner Operator	(85)	47.8%	19.3%	10.4%	15.4%	7.2%
Other	(26)	35.8%	44.8%	9.2%	3.3%	6.8%

By Fleet Size

	Base	Today's Trucking	Truck News	Motor Truck	Truck West	Don't Know Not Stated
1-9 trucks	(136)	42.4%	25.3%	8.1%	12.9%	11.3%
10-99 trucks	(312)	50.4%	34.1%	7.1%	5.9%	2.6%
100+ trucks	(135)	54.1%	31.0%	11.0%	1.3%	2.7%

Half of all readers surveyed would choose Today's Trucking, more than the other three combined.

No matter how you examine these results, by geography, job function, or fleet size, it's clear that Today's Trucking is Canada's go-to magazine from coast to coast. That's especially true in the booming west where Today's Trucking is preferred by a margin of 3 to 1 over the nearest competitor. Want to reach top-level executives? Today's Trucking does it best by far. Have a message for people in the shop? Again, Today's Trucking leads you to more of them by a strong margin. Need to alert owner-operators to your product? Overwhelmingly, the solution is Today's Trucking.

Duplication and Reach

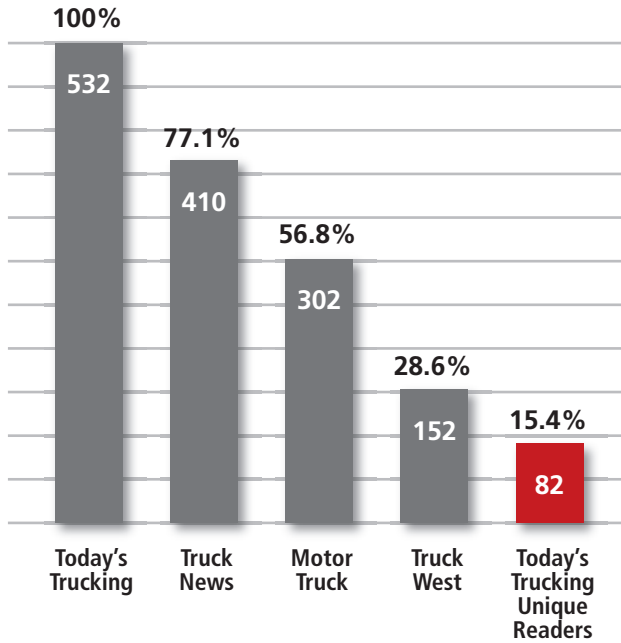
including head-to-head comparisons



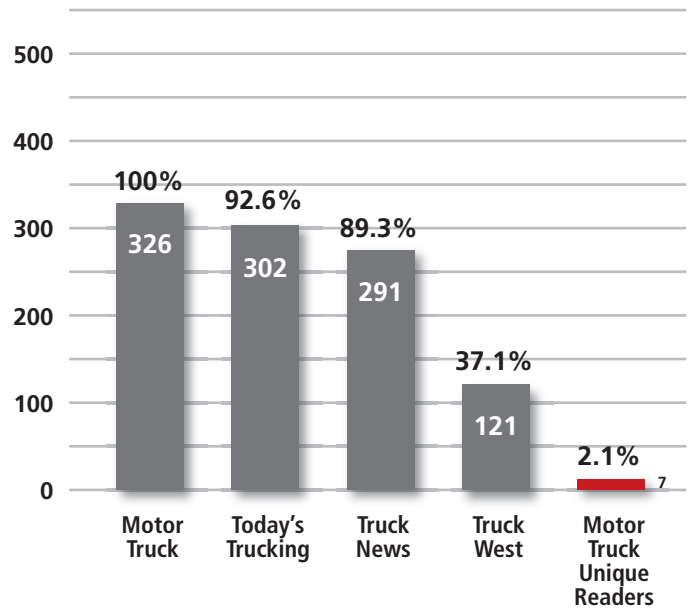
READER DUPLICATION

All Canada - Base 614

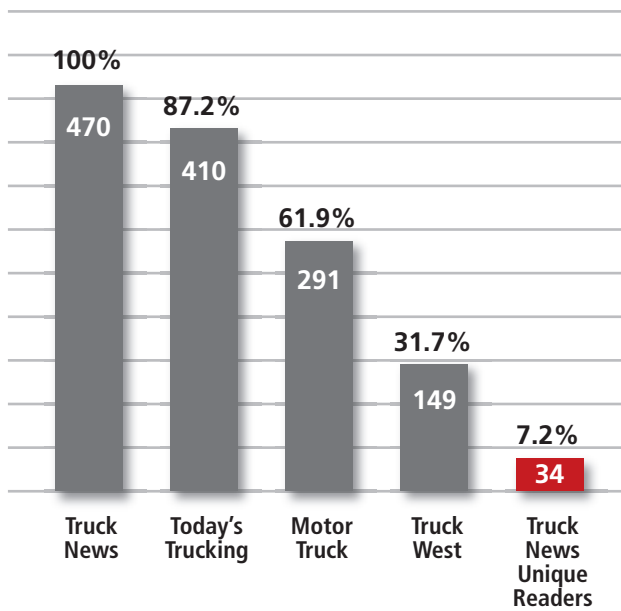
Today's Trucking Readers who also read...



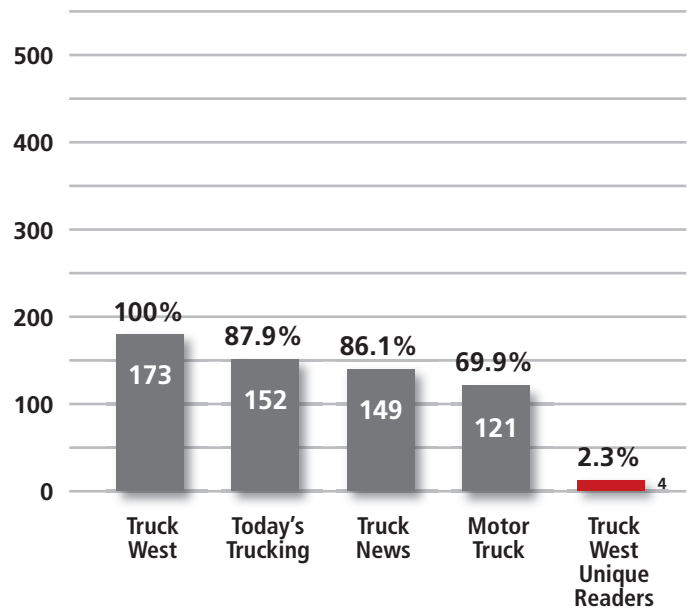
Motor Truck Readers who also read...



Truck News Readers who also read...



Truck West Readers who also read...



Unmatched and less duplicated Today's Trucking stands alone.

Today's Trucking's readership is the least duplicated by other magazines. At the same time, Today's Trucking almost entirely duplicates the readership of every other magazine. In Western Canada, Truck West is duplicated heavily by all three of the other magazines, including a whopping 86.1% duplication by its sister publication Truck News.

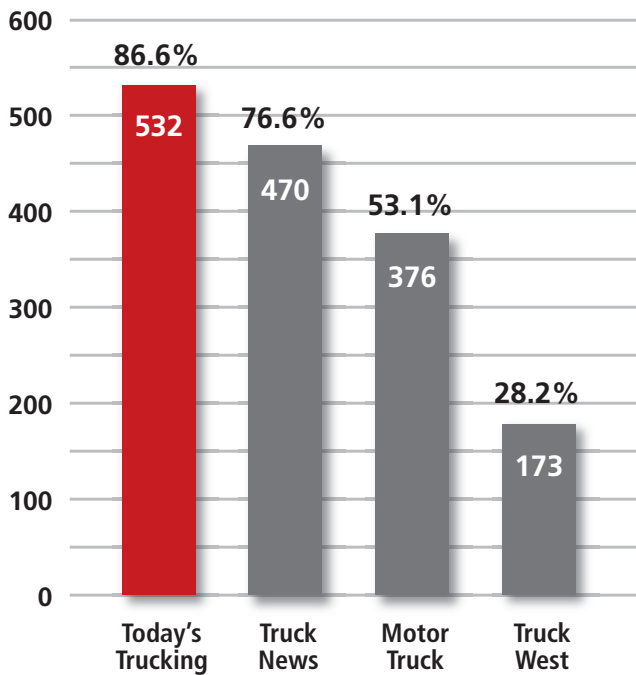
MAGAZINE REACH - ALL CANADA

Base 1: All respondents – 614

Base 2: All respondents from Canada West – 209

All Canada

Base 1: 614

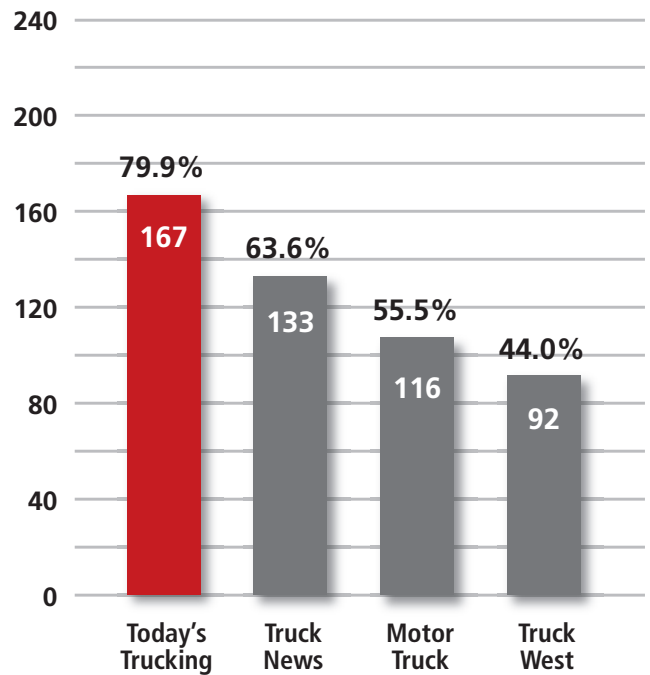


A clear leader emerges: Today's Trucking

From coast-to-coast Today's Trucking is read by the most truckers... by far. Almost half of all truckers surveyed don't read Motor Truck.

Canada West

Base 2: 209

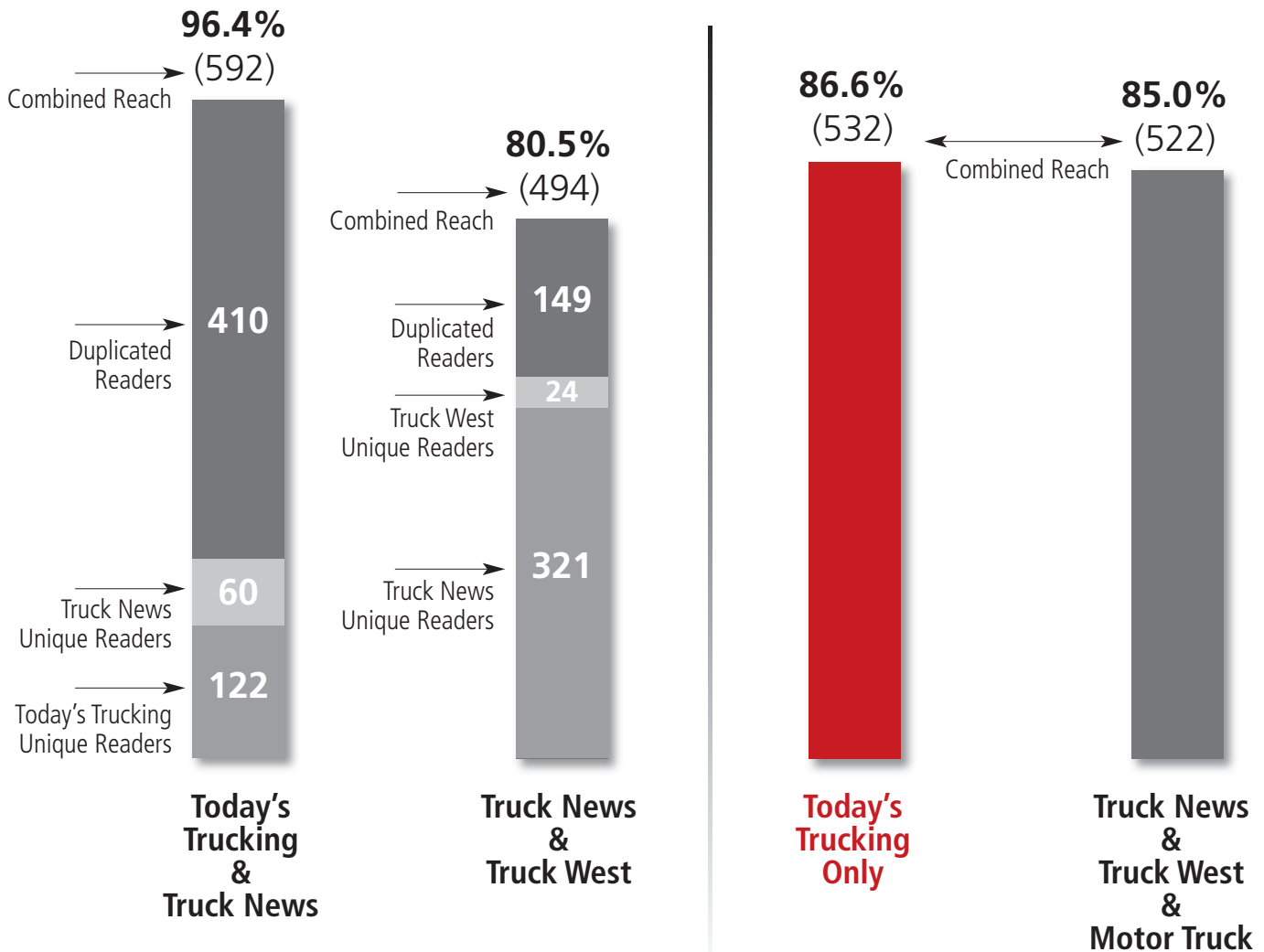


The West looks East for its trucking info.

In the West, Today's Trucking readership exceeds the nearest competitor by 16.3 percentage points. Note that this is a considerably greater margin than in other regions of Canada. More interesting perhaps is that Truck News' readership is greater than Truck West.

COMBINATION REACH

Base: All respondents – 614



Other Combinations

Today's Trucking and Motor Truck	90.6%
Today's Trucking and Truck West	90.1%
Truck News and Motor Truck	82.2%
Truck West and Motor Truck	61.6%

Today's Trucking by itself delivers a greater percentage of the market than all three of the competitor's magazines combined.

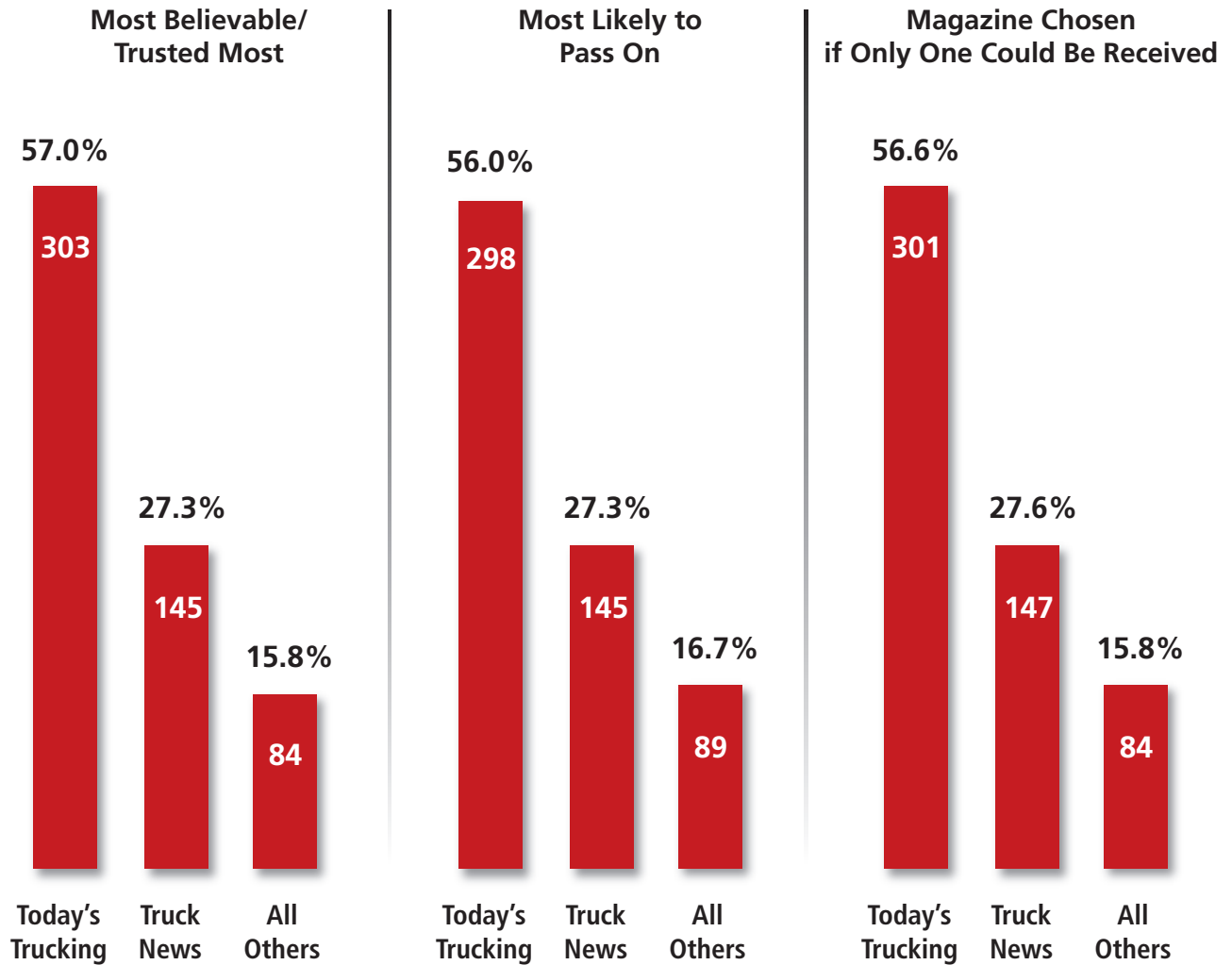
Today's Trucking's market penetration is so great that when it's paired with any of the other magazines the market reach is over 90%.

For those marketers who have enough budget to add a second English-language publication to their mix, Truck News is the magazine that provides the most incremental reach. Again it is clear that Today's Trucking is a must choice for the base buy. By adding Truck News (by itself) as the second buy, advertisers will reach 96.4% of this market.

HEAD-TO-HEAD PREFERENCES

All Today's Trucking readers

Base: 532

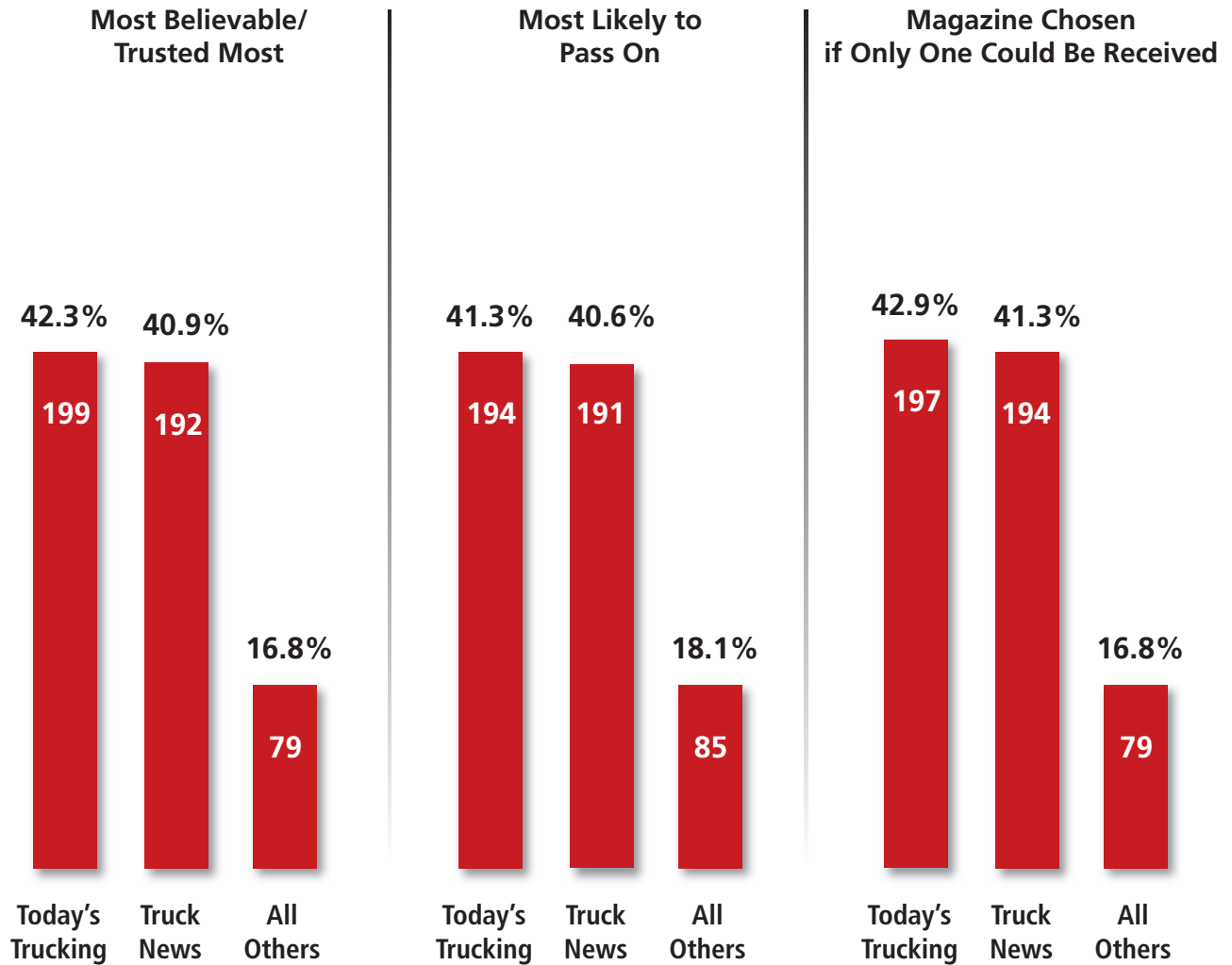


When all Today's Trucking readers are analyzed, most believable, most passed on, and most preferred ratings are more than double the closest competitor. This is a decisive and compelling margin of difference. Canadian trucking people read and pass on Today's Trucking for one distinct reason – it's very obviously the magazine they like the best.

HEAD-TO-HEAD PREFERENCES

All Truck News readers

Base: 470

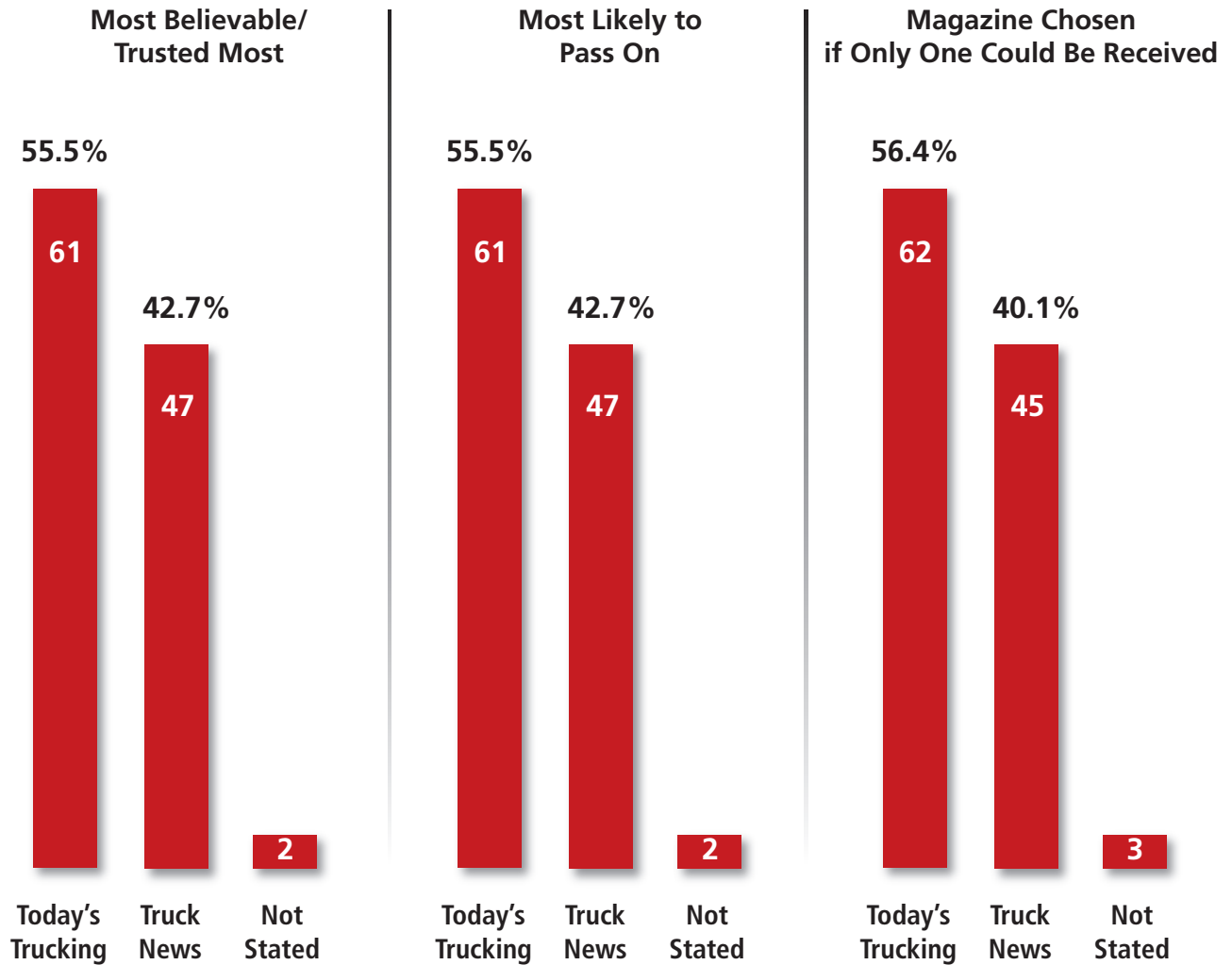


When all of Truck News readers are analyzed, the magazines are in a statistical tie, but Today's Trucking still edges out a victory in each category. Note how poorly 'All Others' perform. Clearly, the others just aren't serious players in the Canadian market.

HEAD-TO-HEAD PREFERENCES

Base: All respondents who read **Today's Trucking and Truck News ONLY**

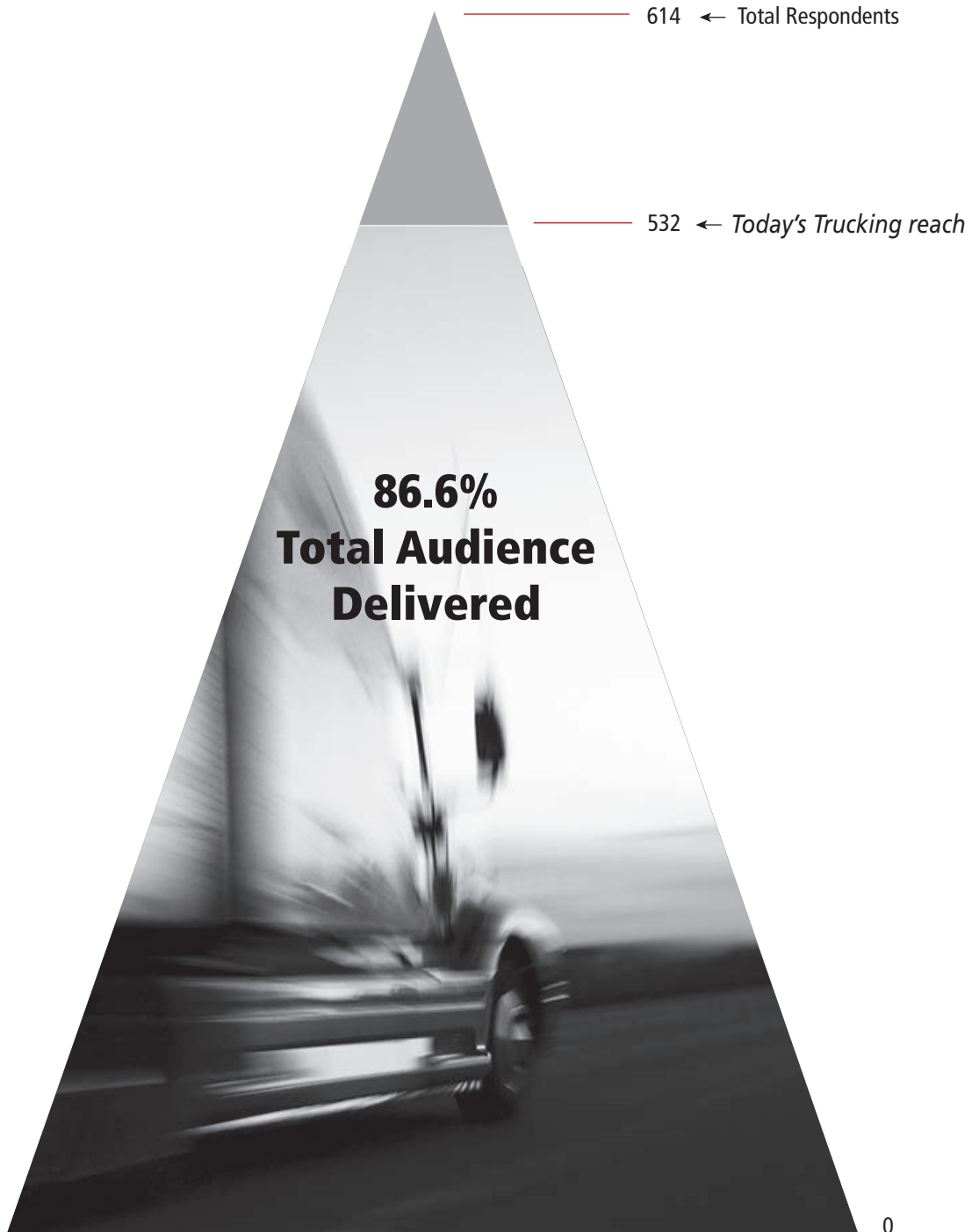
BASE: 110



In a pure 100% head-to-head comparison where there are no other magazines read other than Today's Trucking and Truck News, Today's Trucking is more trusted, more likely to be passed on to other readers and is the clear magazine of choice for Canadian truckers. The difference is not marginal: given exposure to both magazines, a clear majority choose Today's Trucking.

AUDIENCE REACH

Base = 614



The Base Buy

Today's Trucking delivers more truckers across Canada than any other magazine or combination of magazines.

Your first choice among Canadian trucking magazines was never clearer!

NEWCOM

451 Attwell Drive
Toronto, Ontario M9W 5C4
416 614-2200
Fax 416 614-8861