

Radio – Keeping Canadians Connected

Radio adapts to changing needs.

It's always on.

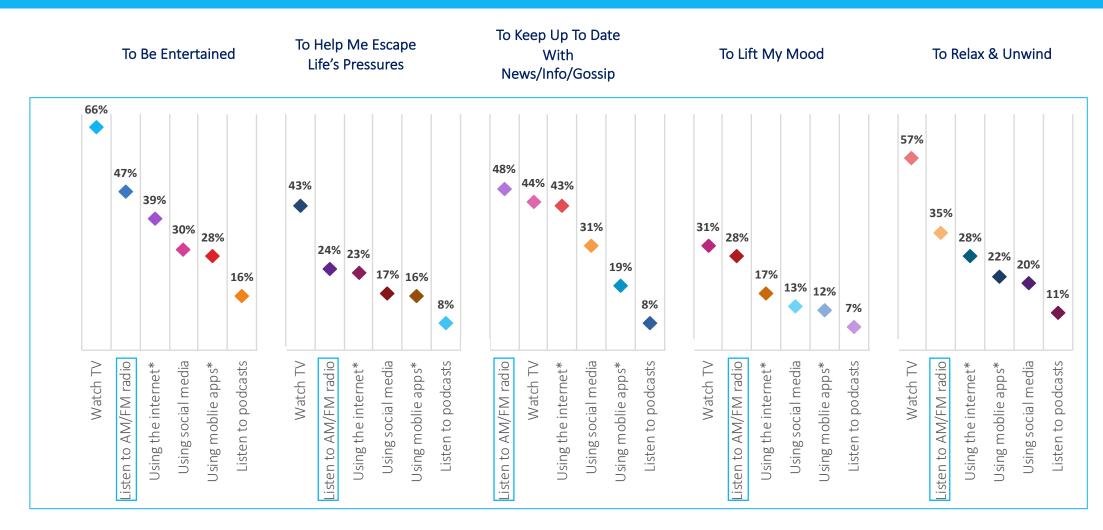
Radio's versatility allows it to adapt and change as important stories and events develop.

Whether extensive live reporting of breaking news, coverage of political statements, hourly updates, or something as simple as empathy, understanding and good humour, Radio's agility keeps Canadians connected.





Radio amplifies emotional well being.





During a time of seclusion, radio might be the only other voice in the room.

Radio stations are acutely aware of the responsibility they shoulder to keep their listeners up to date with accurate news and local information.





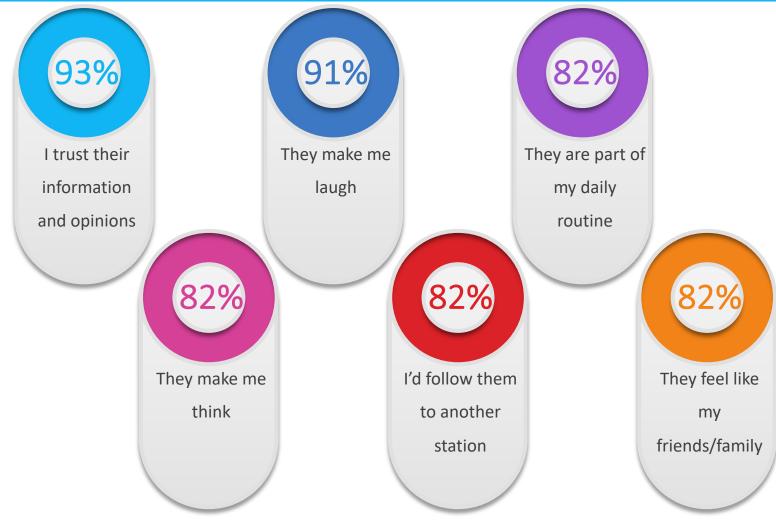






A familiar voice providing comfort.

Radio personalities provide a friendly, familiar and trusted voice during times of uncertainty.

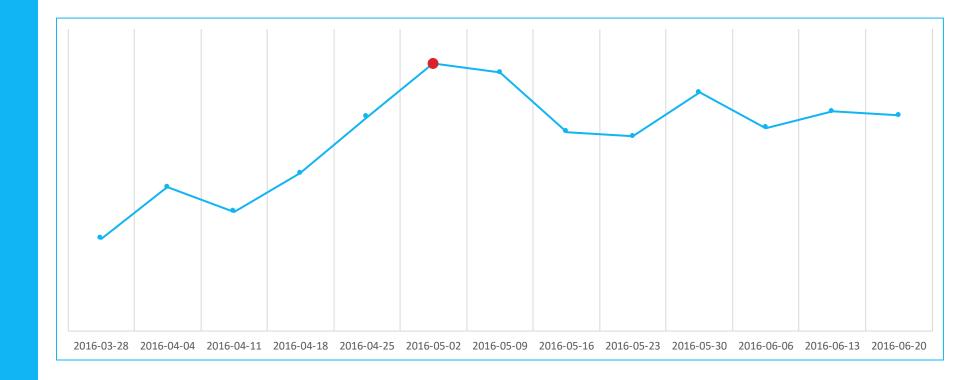




In periods of of crisis, Radio is trusted.

Fort McMurray Fires.

When Albertans were being evacuated, they turned to radio to get the information they needed.





Radio tuning increasing as routines are changing.

Almost 9 out of 10 Canadians are reached by AM/FM radio every week*.

As Canadians are adjusting to the new 'home, work, life' routine, radio is showing an increase in tuning since January 2020.

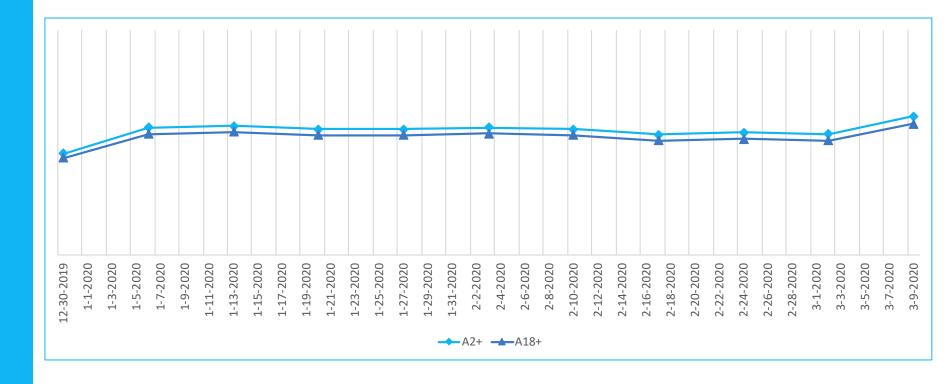




Tuning to radio for what's going on.

News and Talk are providing Canadians with information they need.

News Format stations experienced a +14% spike in listening week over week.

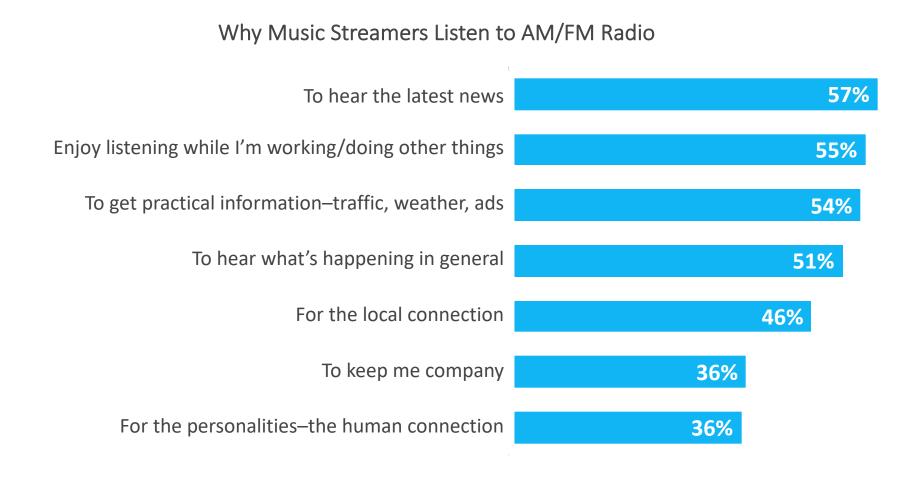




Even music streamers come to radio to connect.

83% of music streamers say they listen in a typical weekday.

23% listen at least2 hrs/day.



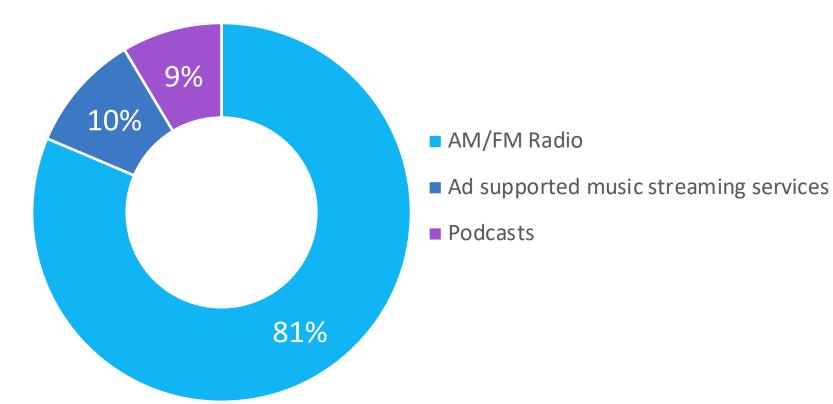


AM/FM Radio is necessary to reach Canadians.

Radio dominates audio consumption available to Canadian advertisers.

With 27 million weekly listeners*, Radio has the reach needed to communicate important information and messages.



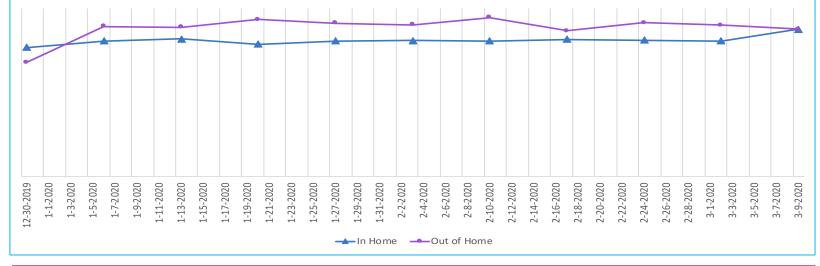


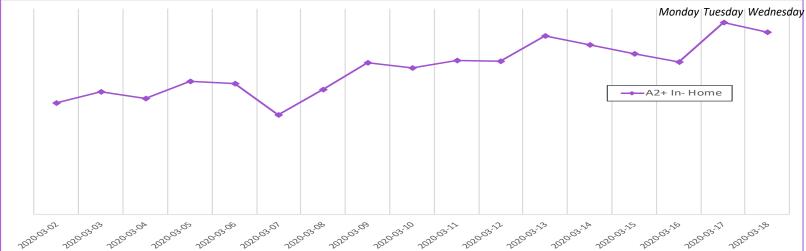


People are tuning in at home.

Canadians are tuning in at home.

As most Canadians are changing routines, we are staying connected with radio while working from home.

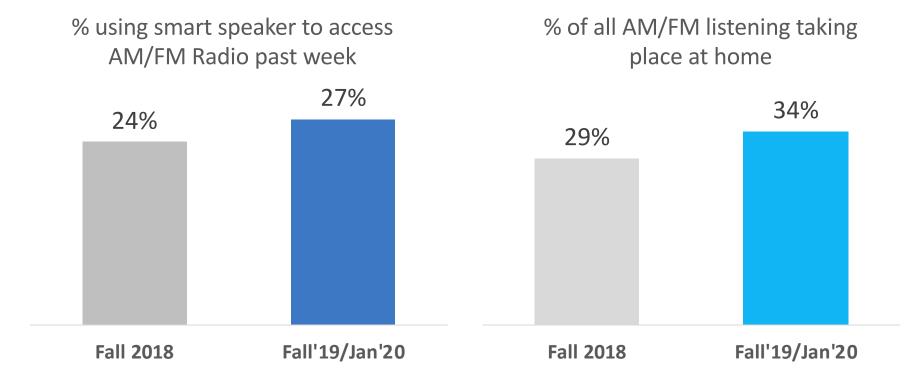




Smart Speakers: the new "at home" radio.

Canadians are increasingly using their smart smart speakers at home to get instant access to AM/FM Radio.

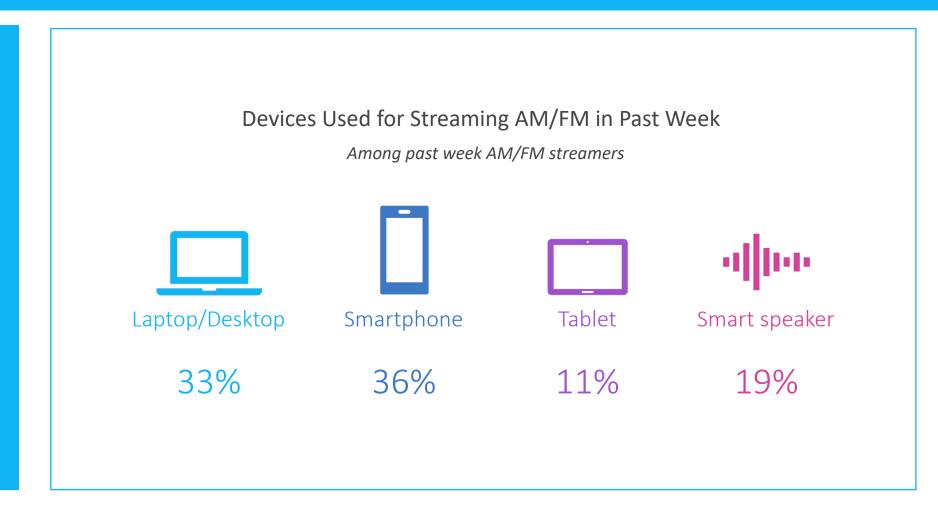
Among Smart Speaker Owners:





Canadians are streaming AM/FM Radio.

Canadians who typically listen while they are "out and about" have new options to tune in Radio while "sheltering."

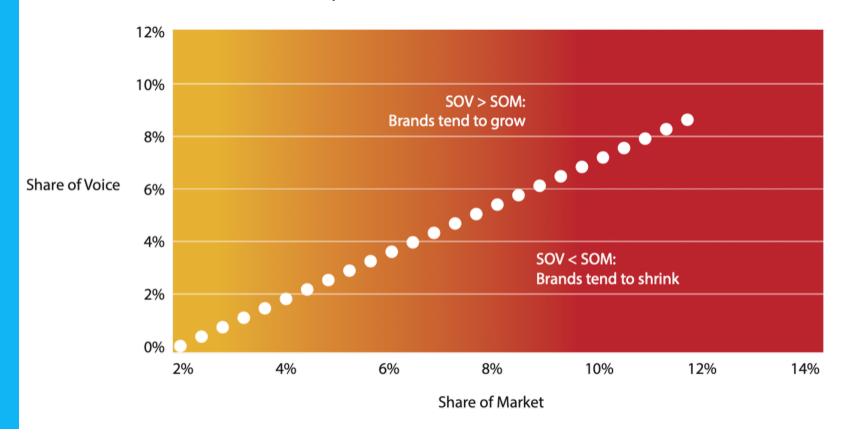




Continued media presence can provide a muchneeded feeling of normality for consumers

Maintaining
Share of Voice
aids advertisers
and prevents
brands from
losing their
Share of Market.

Historically, Share of Voice has driven Share of Market



Source: Les Binet and Peter Field, Media in Focus: Marketing Effectiveness in the Digital Era, IPA, (Figure 07)



Radio provides a trusted platform to connect with customers.

Radio provides the flexibility and agility needed by marketers to pivot messaging quickly. Many advertisers are relying on radio's nimbleness to get important messages to local communities.













































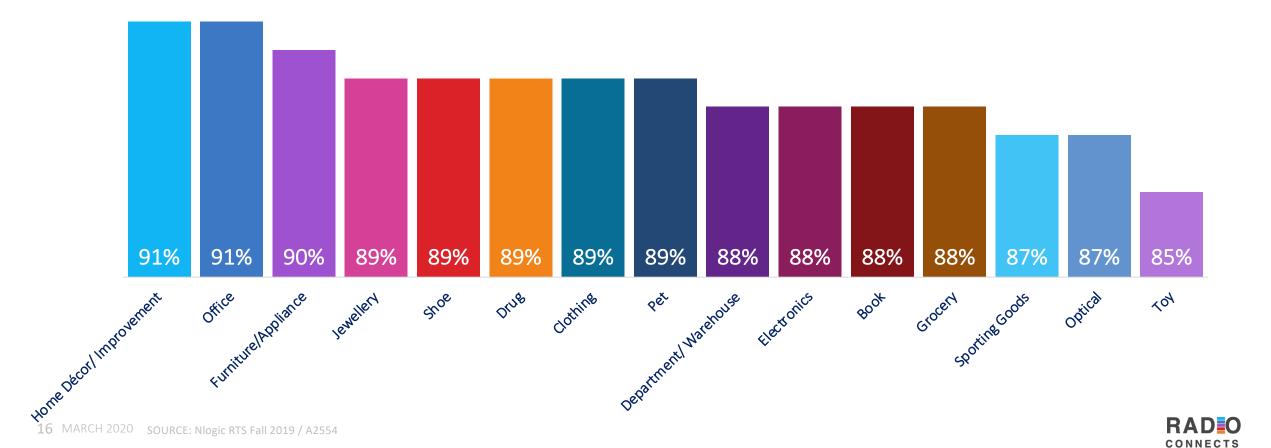






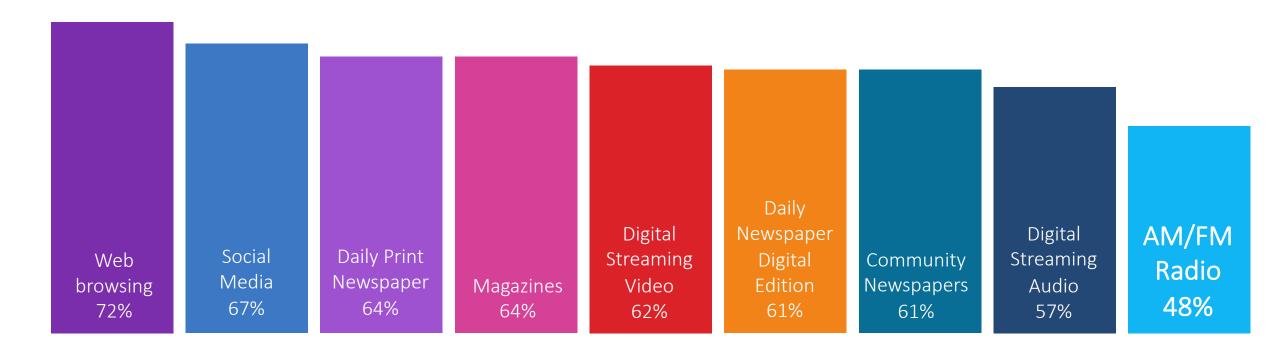
Radio reaches those who can't shop in store.

AM/FM Radio reached 91% of A25-54 that shopped at Home Décor / Improvement Online Stores (weekly)



Radio is the least avoided medium.

Ad Avoidance is real. When marketers need to connect with Canadians - Radio ads are heard.





RADIO REACHES 85% WEEKLY: A18+ SHOPPED INTERNET GROCERY STORES PAST MONTH **INDEX** 18-24 REGION BREAKDOWN: 16% HHI: AVG \$103,000 INDEX 104 **INDEX / % TOTAL** 154 21% 20% AGE BREAKDOWN: 25-34 23% **AVG AGE 42** 133 NDEX 90 **NDEX 124** 15% 35-44 23% 14% NDEX 98 54% **INDEX 87 INDEX** 15% INDEX 139 NDEX 106 NDEX 94 15% 45-54 107 93 91 **OCCUPATIONS:** 12% 55-64 PARENT OR GUARDIAN OF 44% **MPE INDEX 109** 70 ANY DEPENDENT CHILDREN: 20% CLERICAL/ SERVICE **INDEX 123** 11% 43% INDEX 152 < \$40,000 \$40,000 -\$60,000 - \$100,000 - \$150,000+ 5% **HOMEMAKER INDEX 127** 50 \$99,999 \$149,000 \$59,999 APPROX 4% OF CANADIANS A18+ SHOPPED INTERNET GROCERY STORES PAST MONTH 73% of A18+ SHOPPED @ INTERNET GROCERY STORES IN THE PAST MONTH 87% Internet A18+ SHOPPED @ INTERNET occasionally / frequently avoids ads on the internet when browsing -Radio has the lowest level of ad avoidance! Radio **GROCERY STORES PAST MONTH: Radio Reaches** Listen to Yesterday 75% 73% Internet - Web Browsing Daily Newspaper Radio of your Target 85% of them are REACHED while living **Doing House** Relaxing at Internet - Streaming Video 68% their lives Magazine 29% Work / Yard **WEEKLY by RADIO** Home Travelling: Shopping 46% 43% 67% Internet - Social Media / Errands Community 13% 19% of their MEDIA TIME* is 68% Newspaer 62% spent with RADIO At Work / Exercising / 34% 60% Streaming Audio Working Out School Comparing to other audio 75% of them were EXPOSED to 30% platforms - past 7 days -58% Daily Newspapers AM/FM Radio is @ 85% **RADIO YESTERDAY** vs 40% for Music **Getting Ready** 58% **Community Newspapers** AM/FM Music Internet-Only Travelling to/from for School / Waking Up / Streaming Video Service Radio **Streaming** Music Alarm e.g. YouTube work/school Work / Function Radio 52% RADIO delivers 85% WEEKLY of A18+that shopped at Video Service Service 65% 30% 28% internet grocery stores in the past month - a higher % (YouTube) (Spotify) than popular Social Media websites deliver in past 7 days 27% of A18+ Internet Grocery Shoppers, past month find Radio's Contests an 183 Important Attribute -> this is 83% MORE LIKELY then A18+ Later that Later that A18+ Shopped Internet Grocery Store past month: a week same day same week 157 154 Radio Commercial motivation to do a general Internet/online search: 248 221 291 Facebook 58% 132 130 128 124 118 Radio Commercial motivation to visit a specific website: 335 242 236 YouTube. 250 218 165 Radio Commercial motivation to visit a store/business: nstagram 269 243 214 Radio Local-on-air radio discussion motivation to access a website: 436 227 210 Radio Local-on-air radio discussion motivation to attend an event: 28% **Pinterest** 355 239 217 Radio Local-on-air radio discussion motivation to visit a store/business: 51% 25% Google Purchases Time exposed to media before purchase (< 30 mins): Radio Index 100 38% Purchases Time exposed to media before purchase (30 mins+): Radio Index 170 Twitter of my Infoabout products & ervices might Music News fo about sale local stores 8 Purchases Time exposed to media before purchase (made purchase any store/past 24 hrs): Index 124 LinkedIn nt of worl pa l SOURCE: NUMERIS RTS CANADA FALL 2019/ A18+ / TOTAL Snapchat 23% ba © CANADA – SHOPPED INTERNET GROCERY STORES PAST CONNECTS ■ % ■ IND EX MONTH

RADIO REACHES 84% WEEKLY: A18+ ORDERED FOOD USING AN ONLINE RESTAURANT DELIVERY SERVICE IN THE PAST MONTH **INDEX** 18-24 HHI: AVG \$110,000 INDEX 112 REGION BREAKDOWN: 22% 23% 23% **INDEX / % TOTAL** 209 21% 34% AGE BREAKDOWN: 25-34 NDEX 115 **INDEX 135 AVG AGE 36** 197 NDEX 85 35-44 14% 21% 55% **INDEX 74 INDEX** 14% INDEX 132 45-54 13% 109 91 NDEX 82 77 **OCCUPATIONS:** 7% 55-64 PARENT OR GUARDIAN OF 45% **MPE INDEX 110** 38 ANY DEPENDENT CHILDREN: 23% CLERICAL/ SERVICE **INDEX 141** 65+ 33% INDEX 119 < \$40,000 \$40,000 -\$60,000 - \$100,000 - \$150,000+ 11% **STUDENT INDEX 184** 14 \$99,999 \$149,000 \$59,999 APPROX 9% OF CANADIANS A18+ HAVE ORDEREDFOOD USING ONLINE DELIVERY APP IN PST MONTH 74% of A18+ WHO HAVE ORDERED FOOD USING AN ONLINE DELIVERY SERVICE A18+ WHO HAVE ORDERED FOOD Internet IN THE PAST MONTH occasionally / frequently avoids ads on the internet when USING AN ONLINE DELIVERY APP IN browsing - Radio has the lowest level of ad avoidance! Radio **Radio Reaches** THE PAST MONTH: Listen to 5Yesterday 69% 74% Internet - Web Browsing Daily Newspaper 28% Radio of your Target **Doing House** Relaxing at 84% of them are REACHED while living 72% Internet - Streaming Video Work / Yard Home their lives Magazine 19% **WEEKLY by RADIO** Travelling to/from 38% 35% 71% Internet - Social Media work/school Community 8% 18% of their MEDIA TIME* is 67% Newspaer Getting Ready 63% Streaming Audio for School / spent with RADIO At Work / 35% Work / 60% School Comparing to other audio Function.. 69% of them were EXPOSED to platforms - past 7 days -**Daily Newspapers** 60% AM/FM Radio is @ 84% **RADIO YESTERDAY** vs 40% for Music 58% Community Newspapers AM/FM Music Internet-Only Travelling: Shopping / Waking Up / Streaming Video Service Exercising / Radio **Streaming** Music **Working Out** Alarm e.g. YouTube 56% RADIO delivers 84% WEEKLY of A18+WHO HAVE Video Service Service 25% 66% 27% ORDERED FOOD USING AN ONLINE DELIVERY APP IN THE (YouTube) (Spotify) PAST MONTH – a higher % than popular Social Media 25% of A18+ WHO HAVE ORDERED FOOD USING AN ONLINE DELIVERY APP IN THE More than Later that Later that websites deliver in past 7 days PAST MONTH find Radio's Contests an Important Attribute -> this is 69% MORE LIKELY A18+ WHO HAVE ORDERED FOOD USING AN ONLINE DELIVERY APP IN THE PAST MONTH: later 138 132 131 Radio Commercial motivation to do a general Internet/online search: 170 157 218 123 220 64% Radio Commercial motivation to visit a specific website: 172 164 157 136 174 Radio Commercial motivation to visit a store/business: 50% 152 Radio Local-on-air radio discussion motivation to access a website: 154 200 45% 256 153 147 Radio Local-on-air radio discussion motivation to attend an event: Radio Local-on-air radio discussion motivation to visit a store/business: 127 213 161 Snapchat Purchases Time exposed to media before purchase (< 30 mins): Radio Index 118 Purchases Time exposed to media before purchase (30 mins+): Radio Index 124 63% 54% 58% 23% 36% Purchases Time exposed to media before purchase (made purchase any store/past 24 hrs): Index 118 LinkedIn 23% Hearing the Latest Hits New c Rep orts ir / PM Rush Hours ± ⊗ t of worl Discovering I Music/Song Artists Pinterest part @ w SOURCE: NUMERIS RTS CANADA FALL 2019/ A18+ / TOTAL Google+ CANADA - ORDERED FOOD USING AN ONLINE RESTAURANT ng lay CONNECTS DELIVERY SERVICE IN THE PAST MONTH % ■ IND EX

RADIO REACHES 89% WEEKLY: A18+ ORDERED ONLINE MEAL KIT/ PREP FOOD DELIVERY SERVICE IN THE PAST MONTH **INDEX** HHI: AVG \$113,000 INDEX 115 REGION BREAKDOWN: 18-24 11% **INDEX / % TOTAL** 100 AGE BREAKDOWN: 25-34 29% 23% 20% **AVG AGE 41** 167 NDEX 151 59% 35-44 24% **NDEX 114 INDEX 85** 14% NDEX 83 **INDEX** INDEX 151 11% 18% 116 83 **DEX 101** NDEX 76 109 **OCCUPATIONS:** 55-64 12% PARENT OR GUARDIAN OF **52**% **MPE INDEX 129** 67 ANY DEPENDENT CHILDREN: 20% CLERICAL/ SERVICE **INDEX 121** 65+ 6% 49% INDFX 174 \$60,000 - \$100,000 - \$150,000+ 5% **HOMEMAKER INDEX 122** < \$40,000 \$40,000 -28 \$99,999 \$149,000 \$59,999 APPROX 3% OF CANADIANS A18+ HAVE ORDERED ONLINE MEAL KIT/ PREP FOOD DELIVERY SERVICE IN THE PAST MONTH 74% of A18+ WHO HAVE ORDERED MEAL KIT/PREP FOOD DELIVERY IN THE 89% A18+ WHO HAVE ORDERED ONLINE Internet PAST MONTH occasionally / frequently avoids ads on the internet when MEAL KIT/ PREP FOOD DELIVERY browsing - Radio has the lowest level of ad avoidance! Radio **Radio Reaches** SERVICE IN THE PAST MONTH: Listen to 76% Yesterday 74% Internet - Web Browsing Daily Newspaper 38% Radio of your Target 89% of them are REACHED **Doing House** Relaxing at while living 72% Internet - Streaming Video Work / Yard Home their lives 31% **WEEKLY by RADIO** Magazine Travelling: Shopping 46% 40% 71% Internet - Social Media Community / Errands 15% 21% of their MEDIA TIME* is Newspaer 63% Streaming Audio **Getting Ready** spent with RADIO 38% for School At Work / 60% School Magazines Work / Function Comparing to other audio 76% of them were EXPOSED to 33% platforms - past 7 days -**Daily Newspapers** 60% AM/FM Radio is @ 89% **RADIO YESTERDAY** vs 43% for Music 58% Community Newspapers AM/FM Music Internet-Only Travelling to/from Waking Up / Exercising / Streaming Video Service Radio **Streaming** Music **Working Out** e.g. YouTube work/school Alarm Radio 56% RADIO delivers 89% WEEKLY of A18+ WHO HAVE Video Service Service 30% 63% 29% ORDERED ONLINE MEAL KIT/ PREP FOOD DELIVERY (YouTube) (Spotify) SERVICE IN THE PAST MONTH- a higher % than popular 34% of A18+ WHO HAVE ORDERED ONLINE MEAL KIT/ PREP FOOD DELIVERY SERVICE IN Social Media websites deliver in past 7 days THE PAST MONTH find Radio's Entertainment News/ Celebrity Gossip an Important Later that Later that Attribute -> this is 104% MORE LIKELY A18+ WHO HAVE ORDERED ONLINE MEAL KIT/ PREP FOOD DELIVERY SERVICE IN THE PAST MO later Radio Commercial motivation to do a general Internet/online search: 279 264 331 68% 144 142 Radio Commercial motivation to visit a specific website: 301 307 450 51% Radio Commercial motivation to visit a store/business: 285 202 248 310 Radio Local-on-air radio discussion motivation to access a website: 266 260 Radio Local-on-air radio discussion motivation to attend an event: 570 300 253 31% Snapchat Radio Local-on-air radio discussion motivation to visit a store/business: 426 245 297 31% Purchases Time exposed to media before purchase (< 30 mins): Radio Index 119 Purchases Time exposed to media before purchase (30 mins+): Radio Index 184 Twitter 30% ossibility to cer contests { win prizes o abo ut sale local sto res Purchases Time exposed to media before purchase (made purchase any store/past 24 hrs): Index 128 o about of LinkedIn part @ SOURCE: NUMERIS RTS CANADA FALL 2019/ A18+ / TOTAL Google+ ing day CANADA - ORDERED ONLINE MEAL KIT/ PREP FOOD 6 ■ IND EX **DELIVERY SERVICE IN THE PAST MONTH** CONNECTS

RADIO REACHES 86% WEEKLY: A18+ ORDERED HOME DELIVERY FROM A RESTAURANT IN THE PAST MONTH **INDEX** REGION BREAKDOWN 18-24 12% HHI: AVG \$104,000 INDEX 105 **INDEX / % TOTAL** 114 AGE BREAKDOWN: 22% 25-34 22% **AVG AGE 44** 129 19% **NDEX 100** INDEX 11 50% 35-44 22% INDEX 91 13% INDEX 11 12% INDEX **INDEX** 135 45-54 18% 101 99 NDEX 93 NDEX 88 104 **OCCUPATIONS:** 17% 14% 55-64 PARENT OR GUARDIAN OF 44% **MPE INDEX 109** 83 ANY DEPENDENT CHILDREN: 18% CLERICAL/ SERVICE INDEX 112 65+ 12% 35% INDEX 123 < \$40,000 \$40,000 -\$60,000 - \$100,000 - \$150,000+ 7% **TRADSPERSON INDEX 104** 55 \$59,999 \$99,999 \$149,000 APPROX 28% OF CANADIANS A18+ HAVE ORDERED HOME DELIVERY FROM A RESTAURANT IN THE PAST MONTH 127 73% of all A18+ WHO HAVE ORDERED HOME DELIVERY FROM A RESTAURANT 84% A18+ WHO HAVE ORDERED HOME Internet IN THE PAST MONTH occasionally / frequently avoids ads on the internet when DELIVERY FROM A RESTAURANT IN browsing - Radio has the lowest level of ad avoidance! Radio **Radio Reaches** THE PAST MONTH: Listen to 73% Yesterday 73% Internet - Web Browsing Daily Newspaper 34% Radio of your Target 86% of them are REACHED **Doing House** Relaxing at while living Internet - Social Media 69% their lives Magazine 18% Work / Yard Home **WEEKLY by RADIO** Travelling: Shopping 45% 41% 65% Internet - Streaming Video Community Errands 8% 21% of their MEDIA TIME* is Newspaer 64% **Getting Ready** Magazines spent with RADIO for School / Exercising / 23% **Daily Newspapers** 62% Work / Function **Working Out** Comparing to other audio 73% of them were EXPOSED to platforms - past 7 days -31% 60% **Community Newspapers** AM/FM Radio is @ 86% **RADIO YESTERDAY** vs 28% for Music Streaming Audio 59% AM/FM Music Internet-Only Travelling to/from Waking Up / At Work / Streaming Video Service Radio **Streaming** Music Alarm School e.g. YouTube work/school 51% RADIO delivers 86% WEEKLY of A18+ ORDERED HOME Radio Video Service Service 26% 65% 29% **DELIVERY FROM A RESTAURANT IN THE PAST MONTH - a** (YouTube) (Spotify) higher % than popular Social Media websites deliver in 20% of A18+ WHO HAVE ORDERED HOME DELIVERY FROM A RESTAURANT IN THE PAST Later that Later that past 7 days MONTH find Radio's Entertainment News/ Celebrity Gossip an Important Attribute -> this A18+ WHO HAVE ORDERED HOME DELIVERY FROM A RESTAURANT IN THE PAST MONTH: a week is 20% MORE LIKELY same day same weel 124 131 Radio Commercial motivation to do a general Internet/online search: 139 Facebook 57% 114 Radio Commercial motivation to visit a specific website: 144 121 126 125 Radio Commercial motivation to visit a store/business: 124 110 110 120 120 132 Radio Local-on-air radio discussion motivation to access a website: 108 118 Radio Local-on-air radio discussion motivation to attend an event: 148 118 Google+ 141 110 Radio Local-on-air radio discussion motivation to visit a store/business: Pinterest Purchases Time exposed to media before purchase (< 30 mins): Radio Index 108 Purchases Time exposed to media before purchase (30 mins+): Radio Index 106 Discovering New Music/Songs/ Artists Twitter ossibility to cer contests { win prizes Purchases Time exposed to media before purchase (made purchase any store/past 24 hrs): Index 103 part of I LinkedIn SOURCE: NUMERIS RTS CANADA FALL 2019/ A18+ / TOTAL Snapchat CANADA - ORDERED HOME DELIVERY FROM A RESTAURANT CONNECTS IN THE PAST MONTH ■% ■IND EX

Canadians stay connected with Radio.

01

RADIO IS ALWAYS ON

As communities adapt to constant change, Radio has the agility needed to adapt and respond.

02

A FAMILIAR VOICE

A familiar and trusted voice, Radio has a relationship with the listener that supports brands at any time during any situation. 03

RADIO IS EVERYWHERE

In the car, at home or on the move,
AM/FM provides the connection
Canadian's need to know what's going
on.

04

RADIO ADVERTISERS ARE HEARD

AM/FM Radio provides the most ad supported audio audience, reaching over 27 million Canadians each week. Ads that run on Radio are the least avoided.

05

RADIO DELIVERS ONLINE SHOPPERS

Radio doesn't get the credit for online activity it deserves. One third of those who heard an ad on the Radio took action online researching or purchasing the product.

RADIO CONNECTS

Radio offers not just an

Radio offers not just an escape, but also a connection for those that might need it most. At a time of isolation the radio might be the only other voice in the room.

