

# Radio – Keeping Canadians Connected

# Radio adapts to changing needs.

## It's always on.

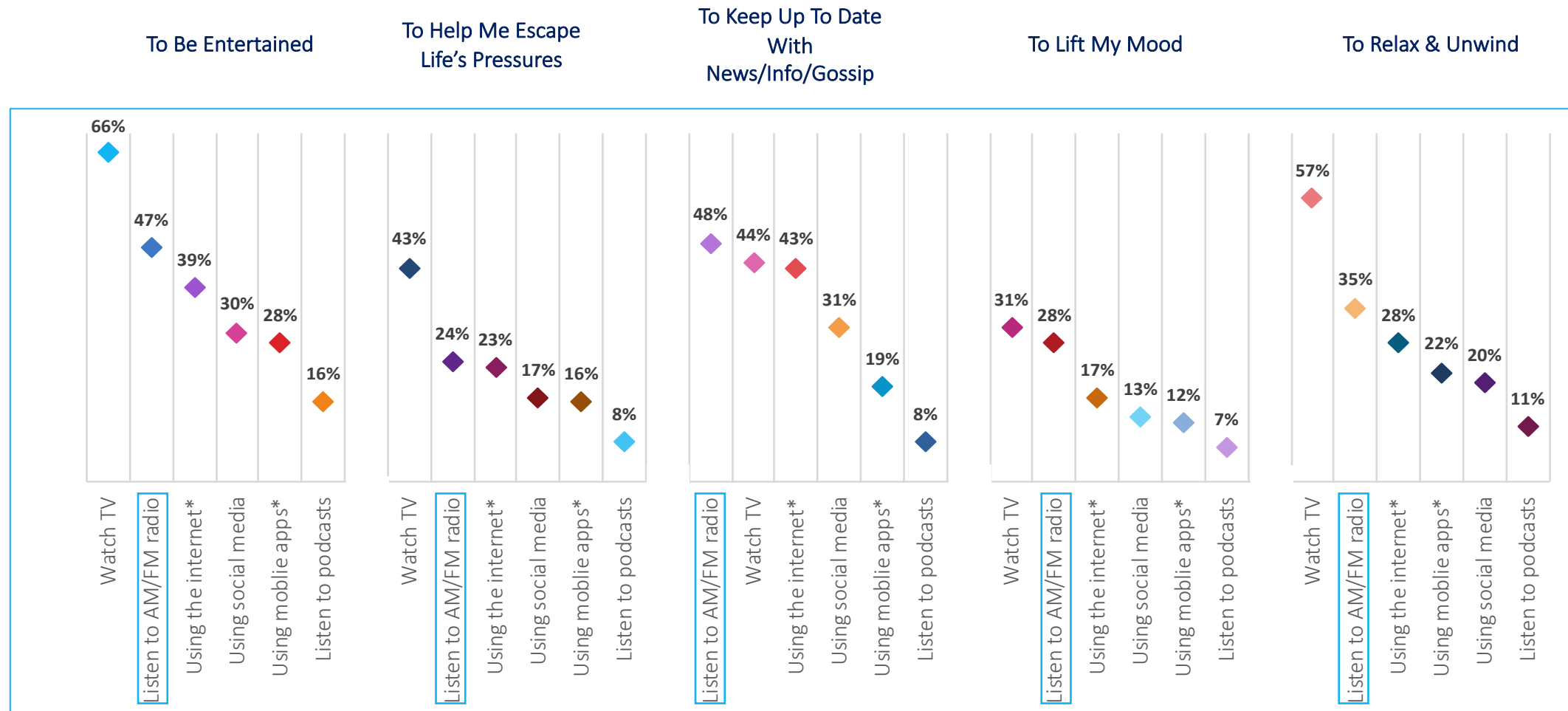
Radio's versatility allows it to adapt and change as important stories and events develop.

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.



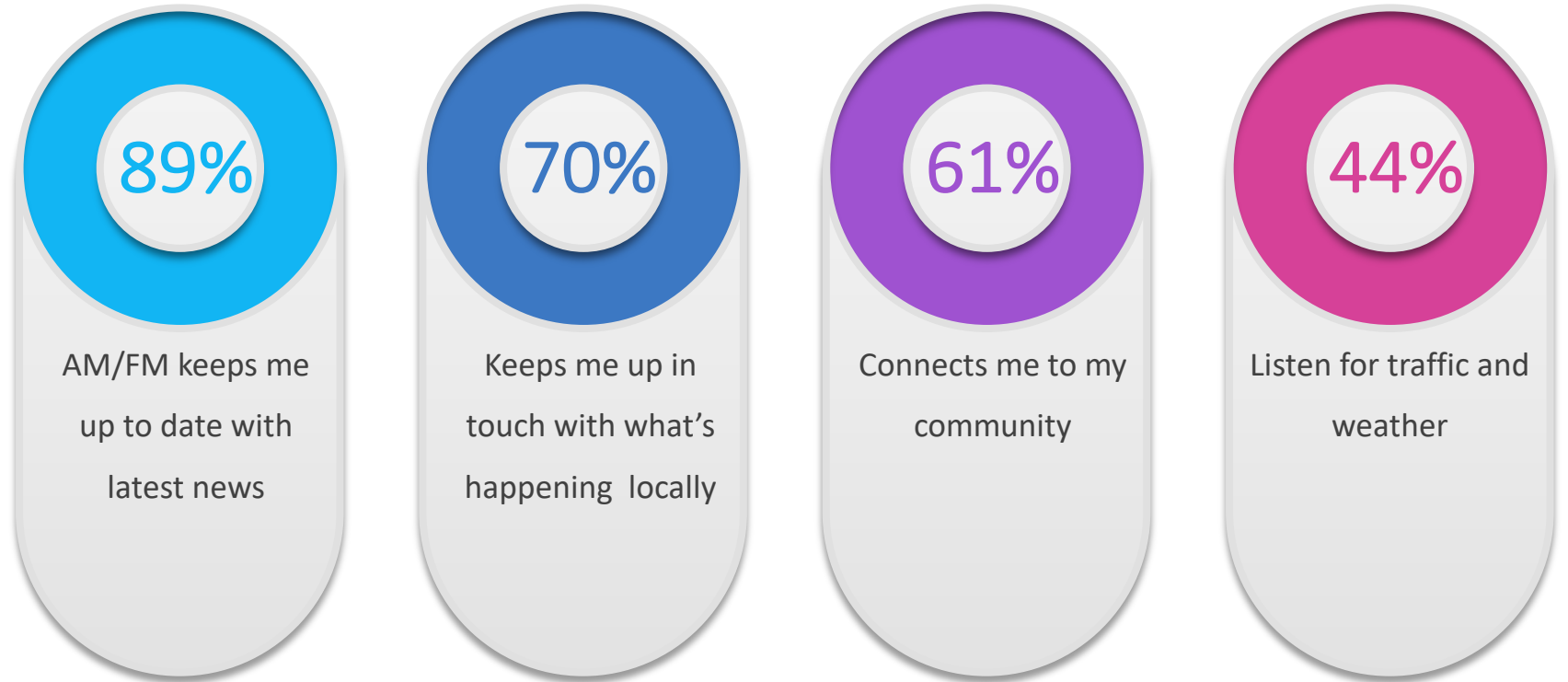


# Radio amplifies emotional well being.



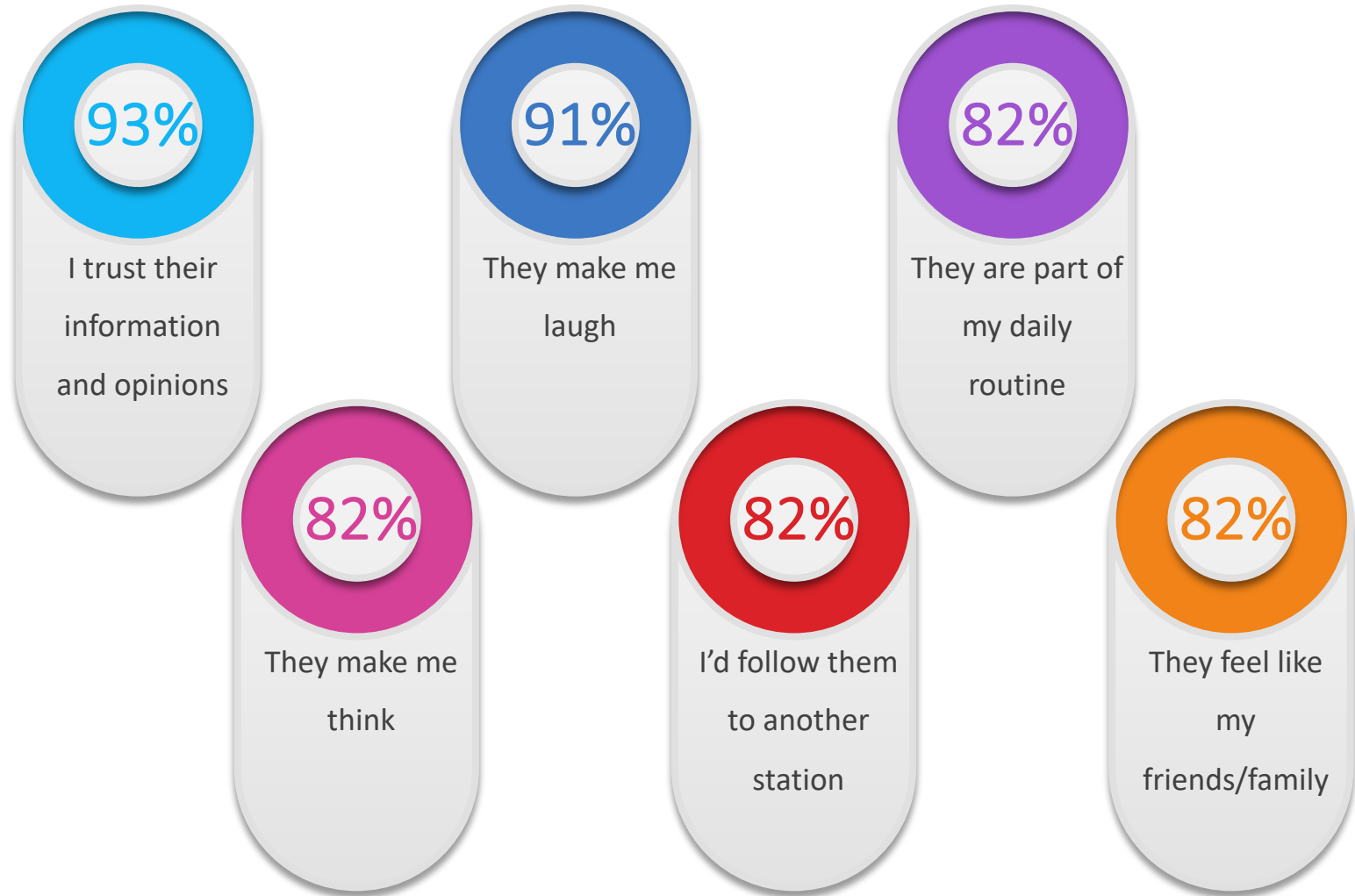
# During a time of seclusion, radio might be the only other voice in the room.

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.

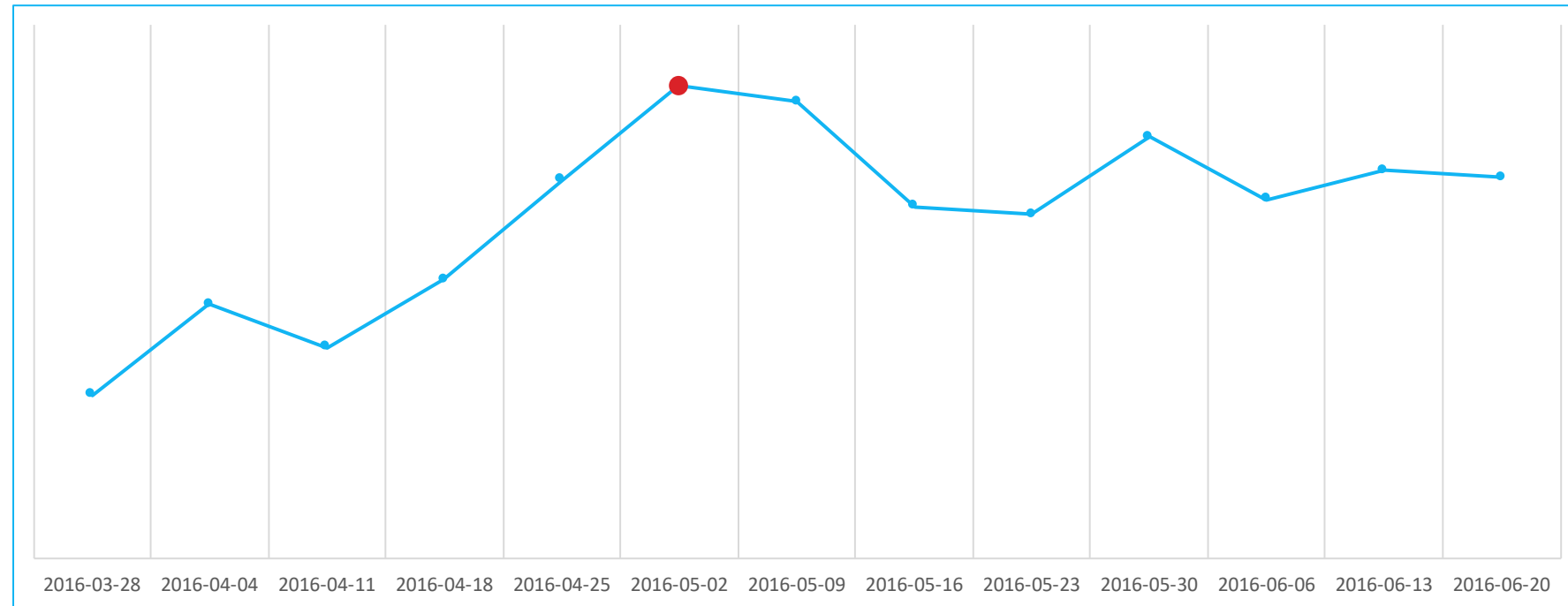
Radio personalities provide a friendly, familiar and trusted voice during times of uncertainty.



# In periods of crisis, Radio is trusted.

## Fort McMurray Fires.

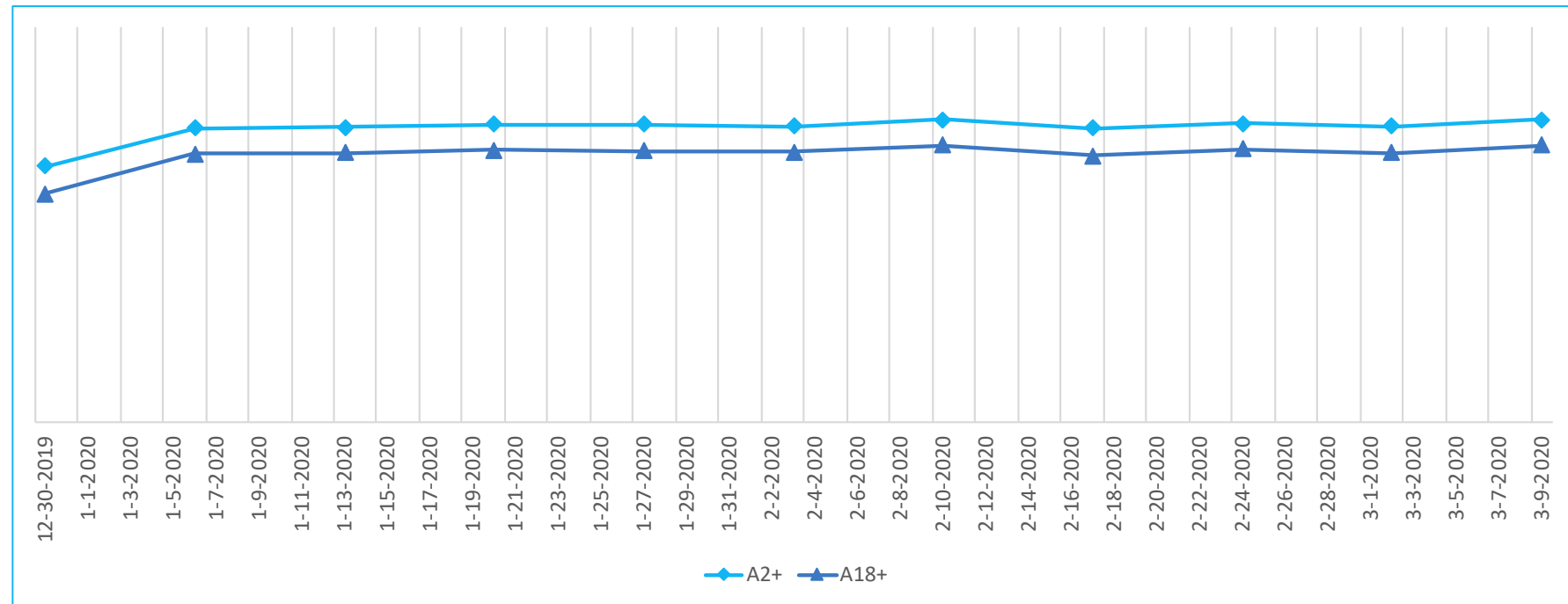
When Albertans were being evacuated, they turned to radio to get the information they needed.



# Radio tuning increasing as routines are changing.

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

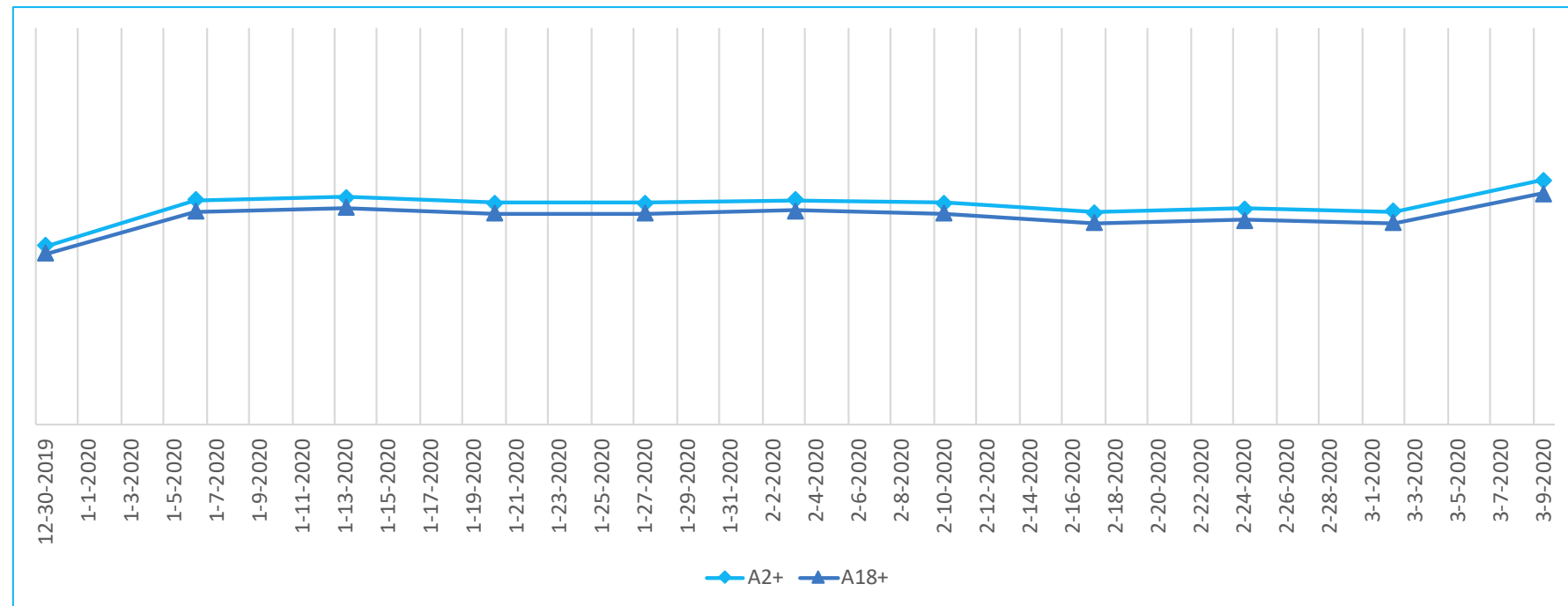
As Canadians are adjusting to the new 'home, work, life' routine, radio is showing an increase in tuning since January 2020.



# 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.



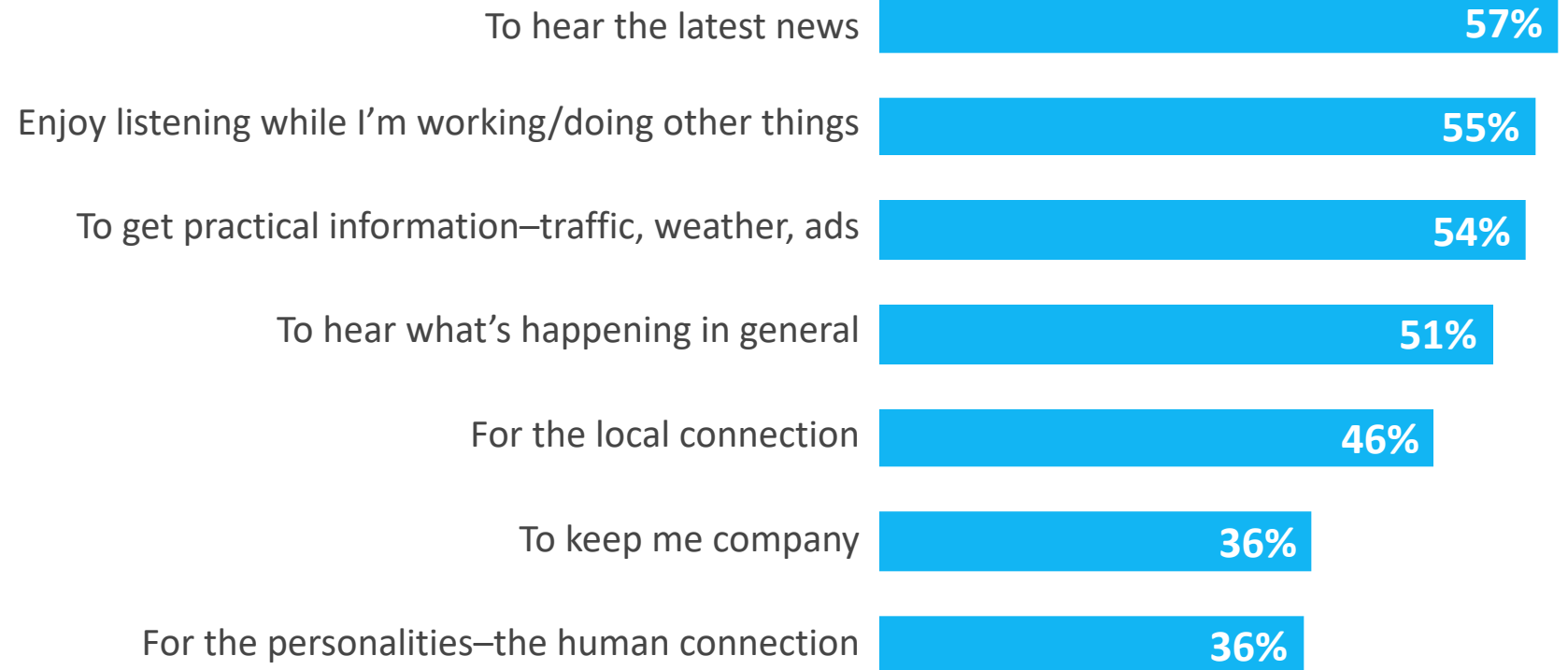


# Even music streamers come to radio to connect.

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

23% listen at least 2 hrs/day.

## Why Music Streamers Listen to AM/FM Radio

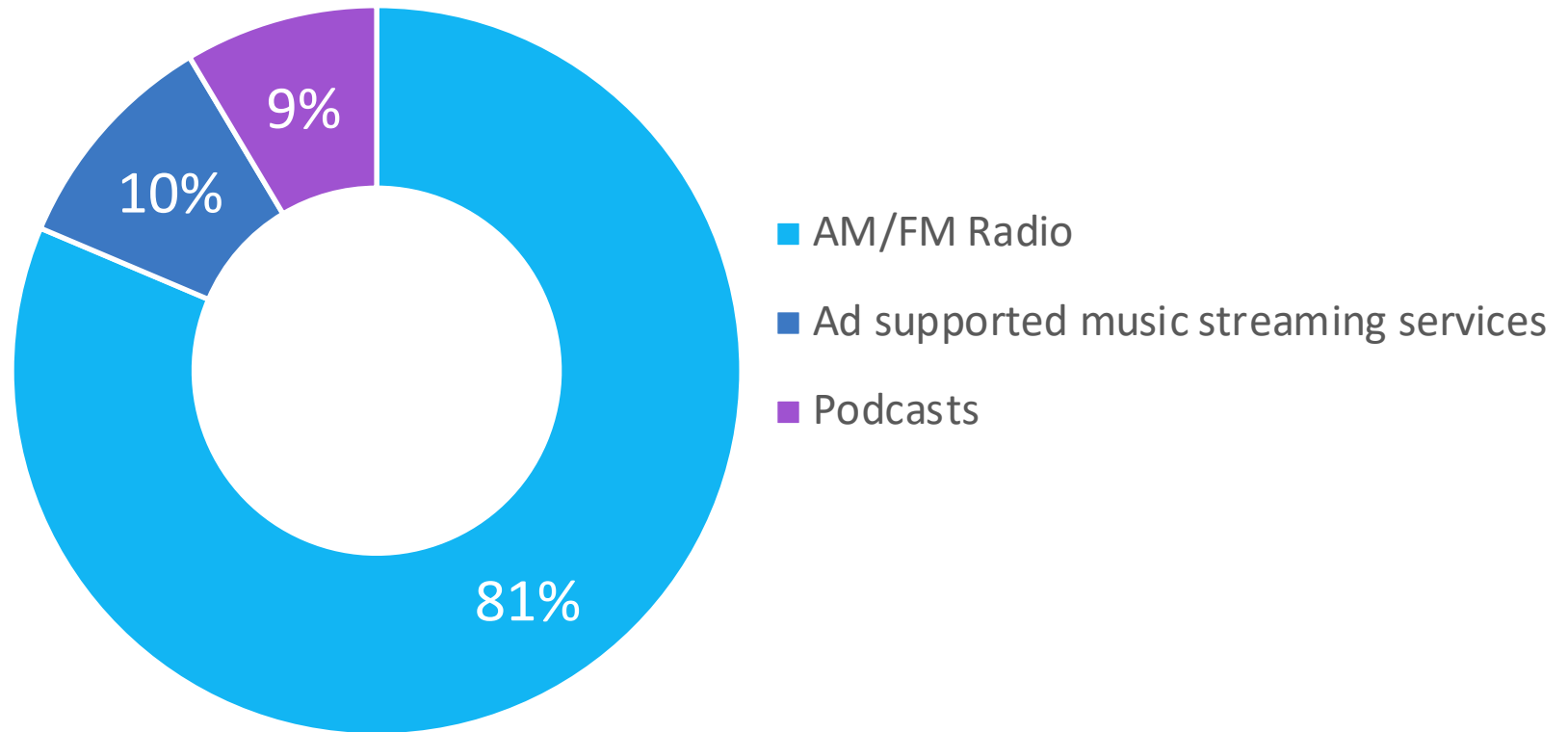


# AM/FM Radio is necessary to reach Canadians.

Radio dominates audio consumption available to Canadian advertisers.

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

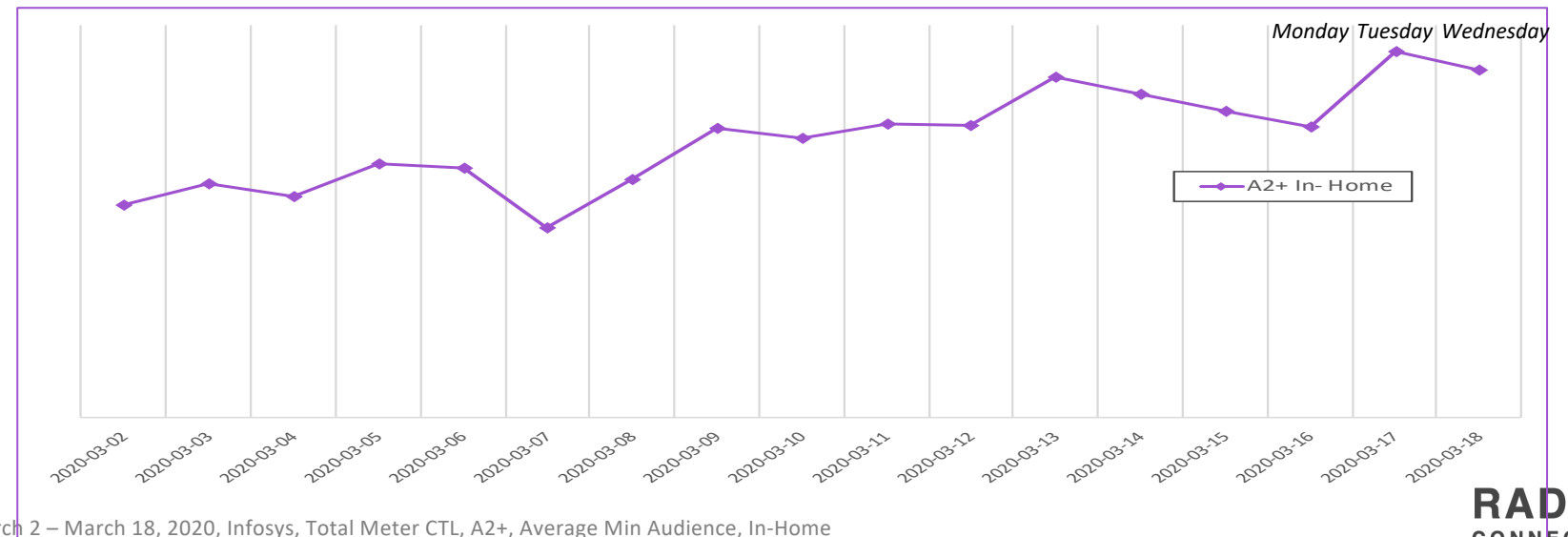
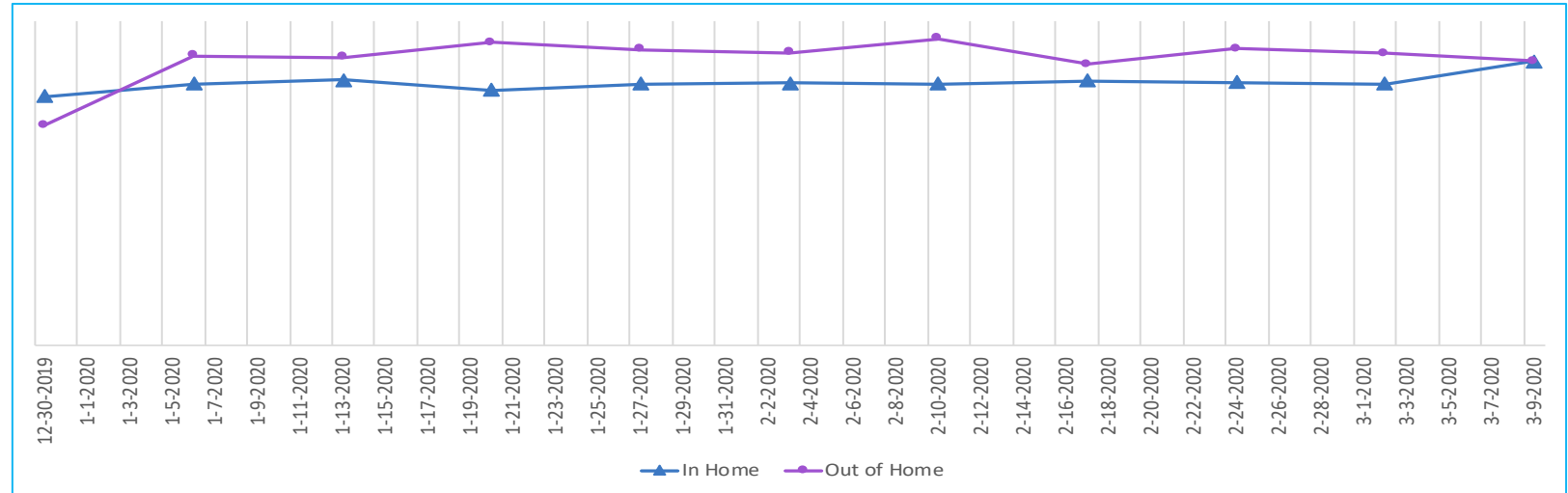
SHARE OF BUYABLE AUDIO – A18+



# 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.

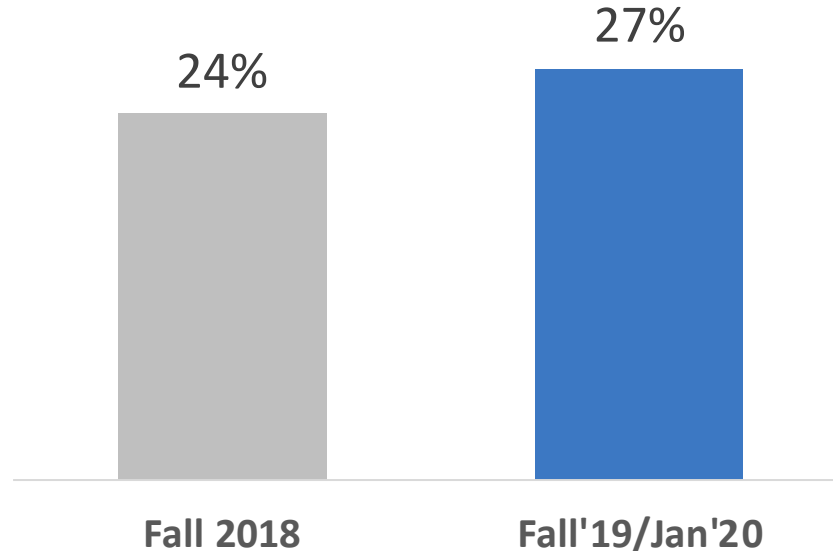


# Smart Speakers: the new “at home” radio.

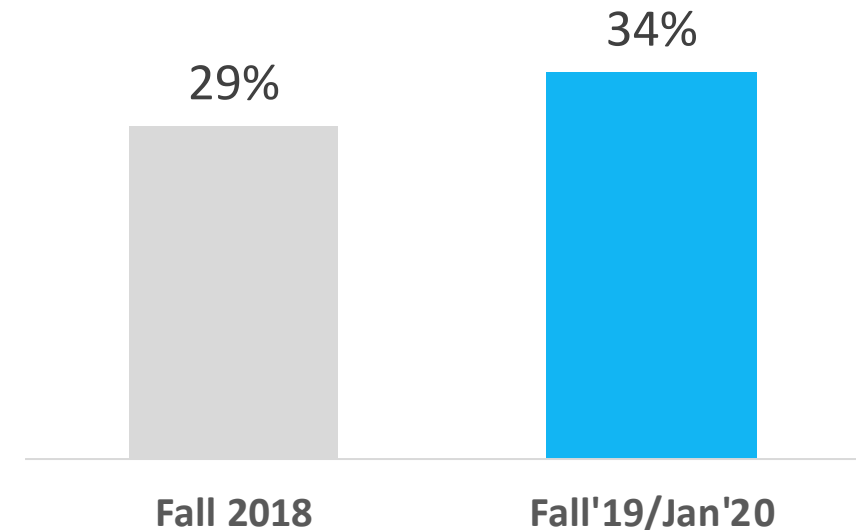
Canadians are increasingly using their smart smart speakers at home to get instant access to AM/FM Radio.

## Among Smart Speaker Owners:

% using smart speaker to access AM/FM Radio past week

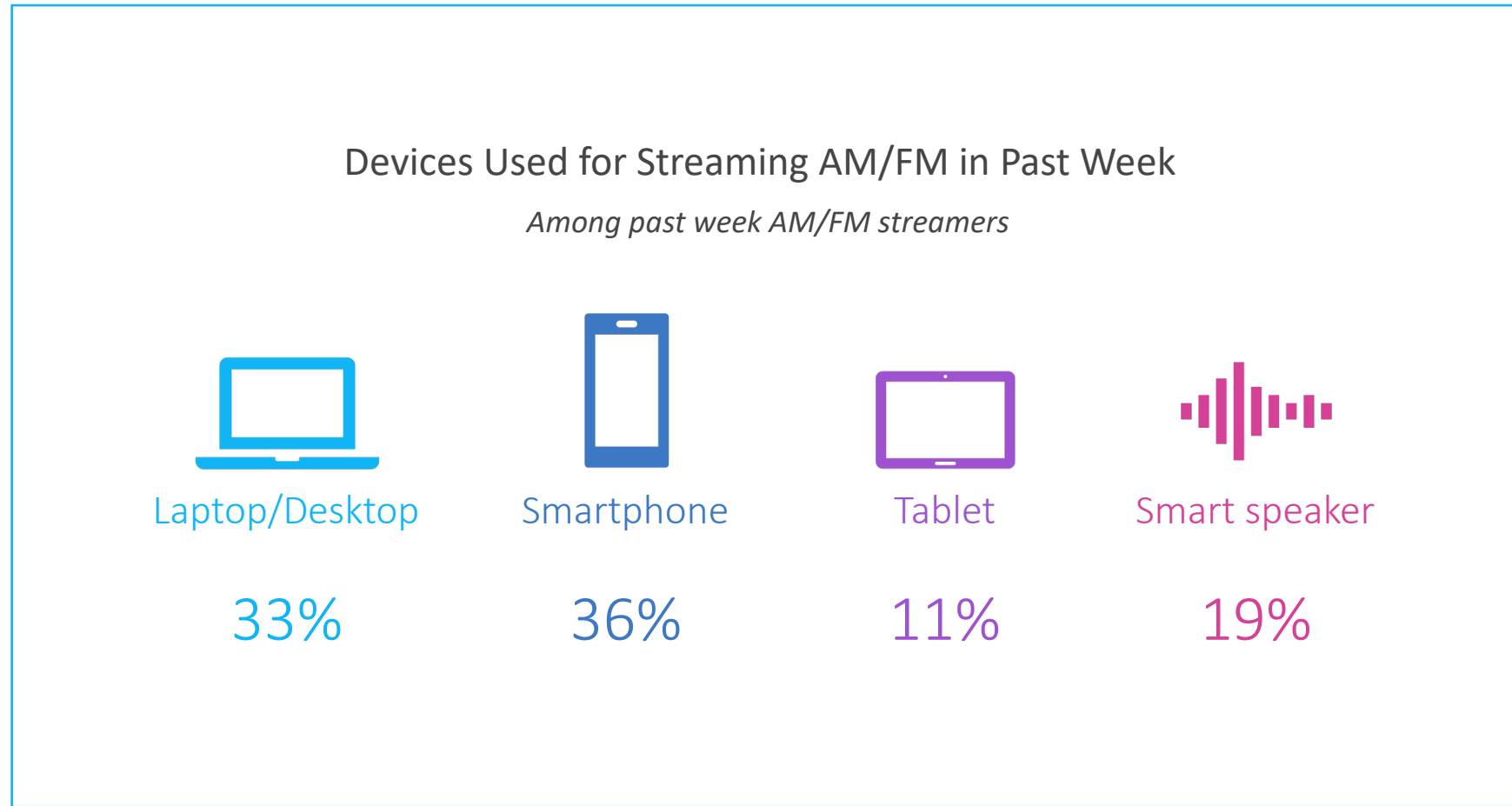


% of all AM/FM listening taking place at home



# Canadians are streaming AM/FM Radio.

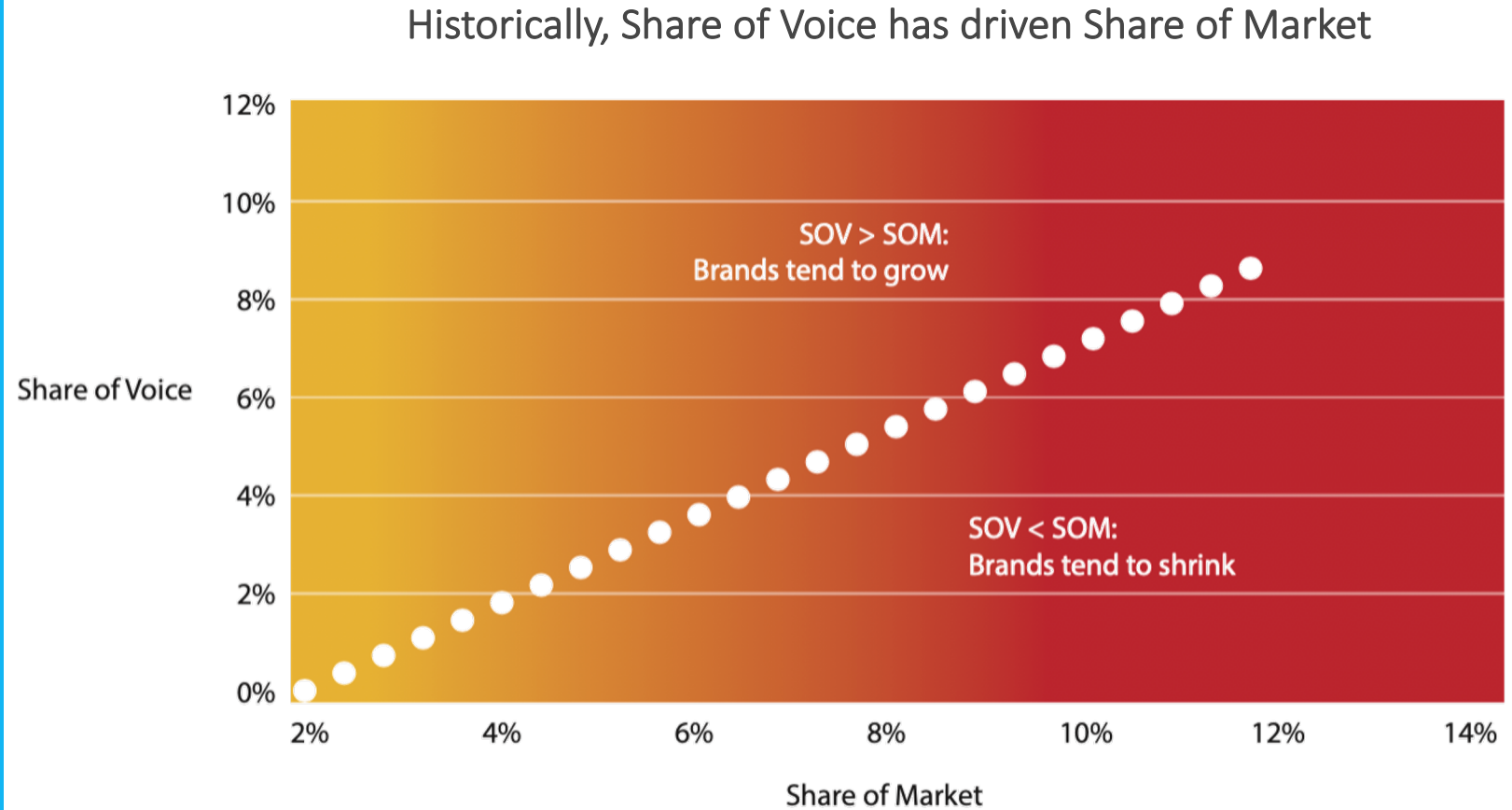
Canadians who typically listen while they are “out and about” have new options to tune in Radio while “sheltering.”





# Continued media presence can provide a much-needed feeling of normality for consumers

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



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

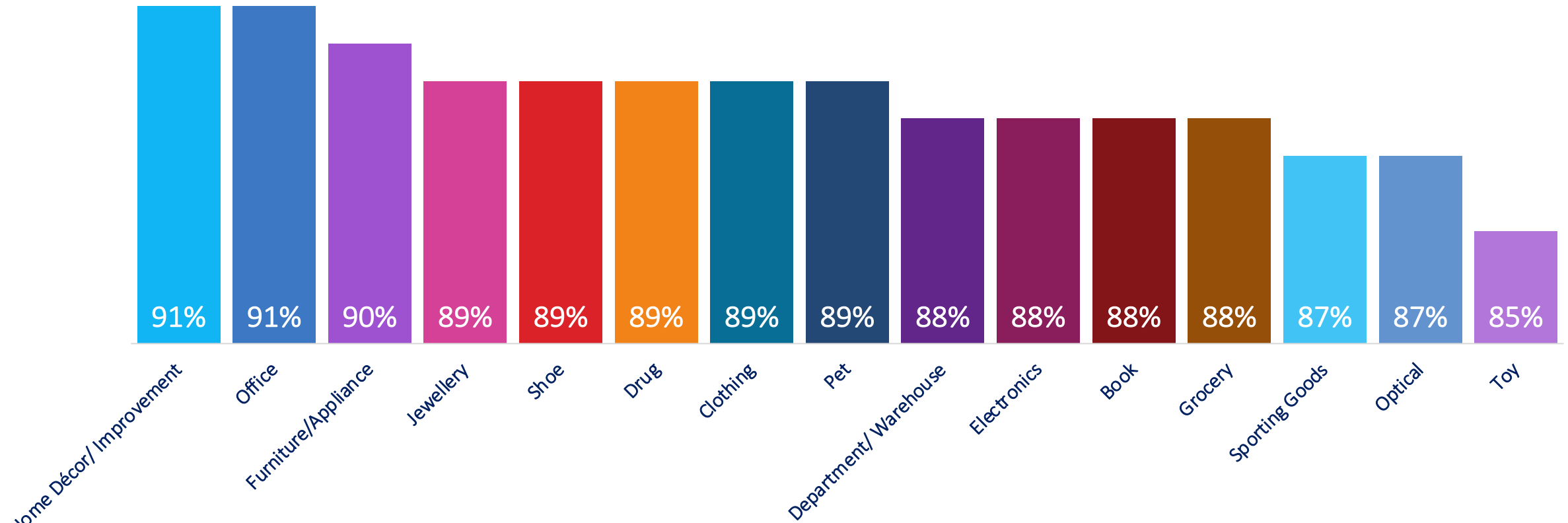
# Radio provides a trusted platform to connect with customers.

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.



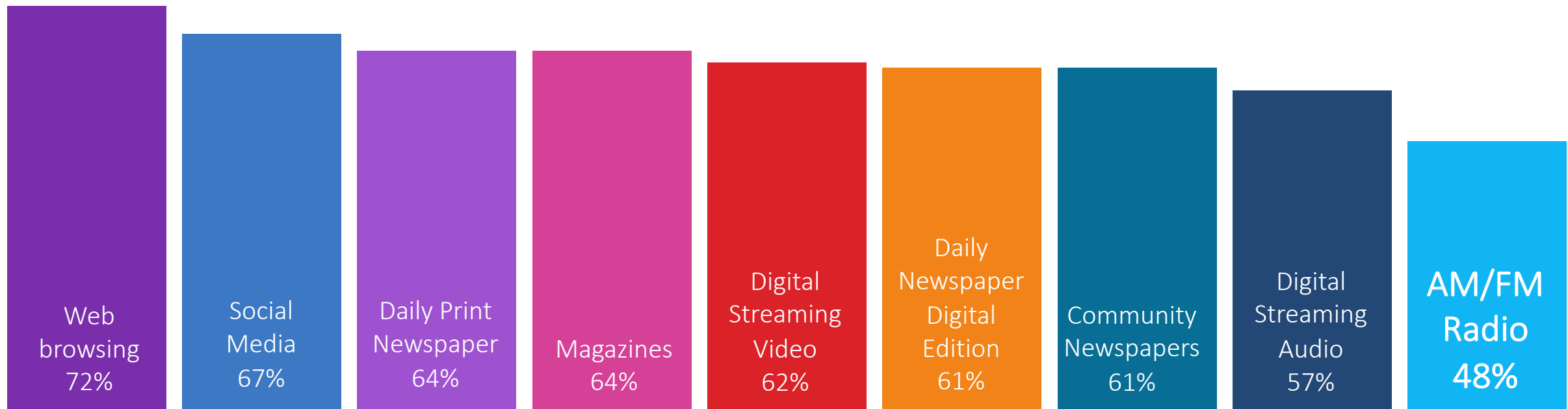
# Radio reaches those who can't shop in store.

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

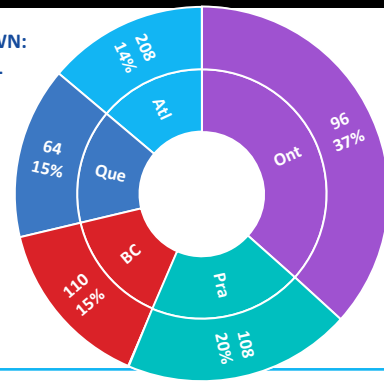
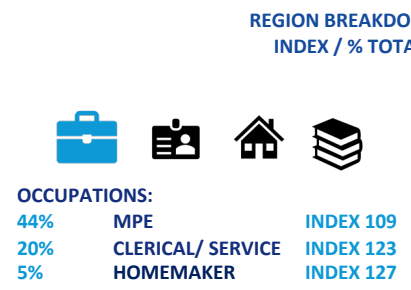
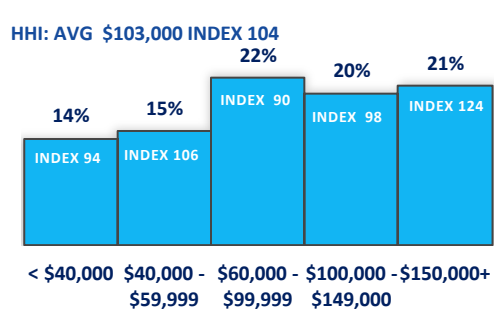
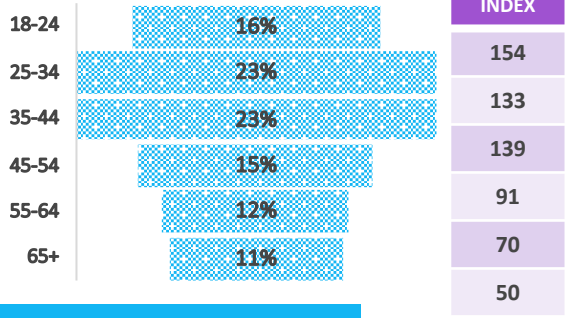
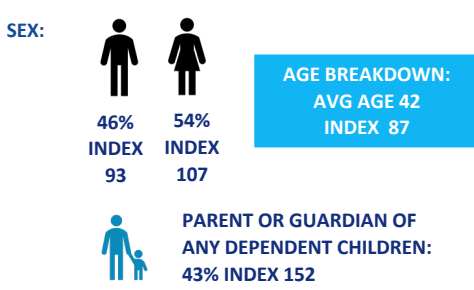


# Radio is the least avoided medium.

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



APPROX 4% OF CANADIANS A18+ SHOPPED INTERNET GROCERY STORES PAST MONTH

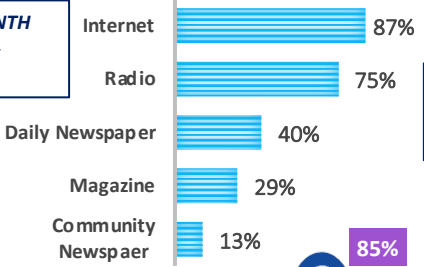
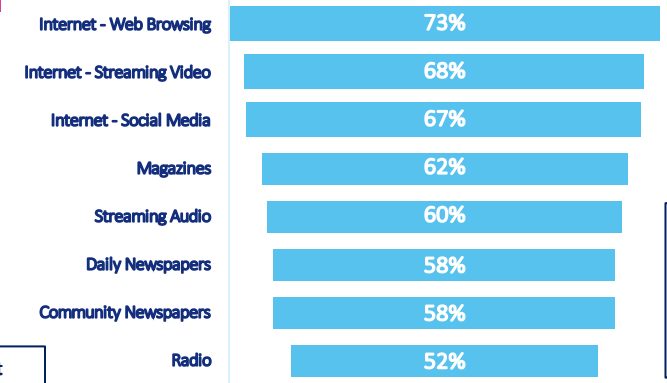
A18+ SHOPPED @ INTERNET GROCERY STORES PAST MONTH:

85% of them are REACHED WEEKLY by RADIO

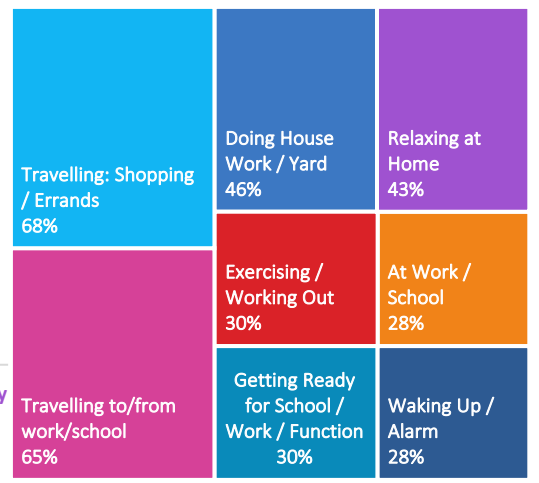
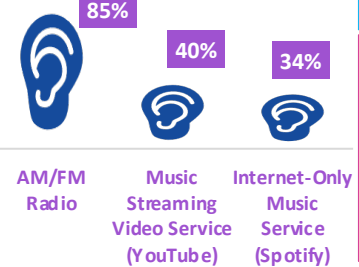
19% of their MEDIA TIME\* is spent with RADIO

75% of them were EXPOSED to RADIO YESTERDAY

73% of A18+ SHOPPED @ INTERNET GROCERY STORES IN THE PAST MONTH occasionally / frequently avoids ads on the internet when browsing - Radio has the lowest level of ad avoidance!

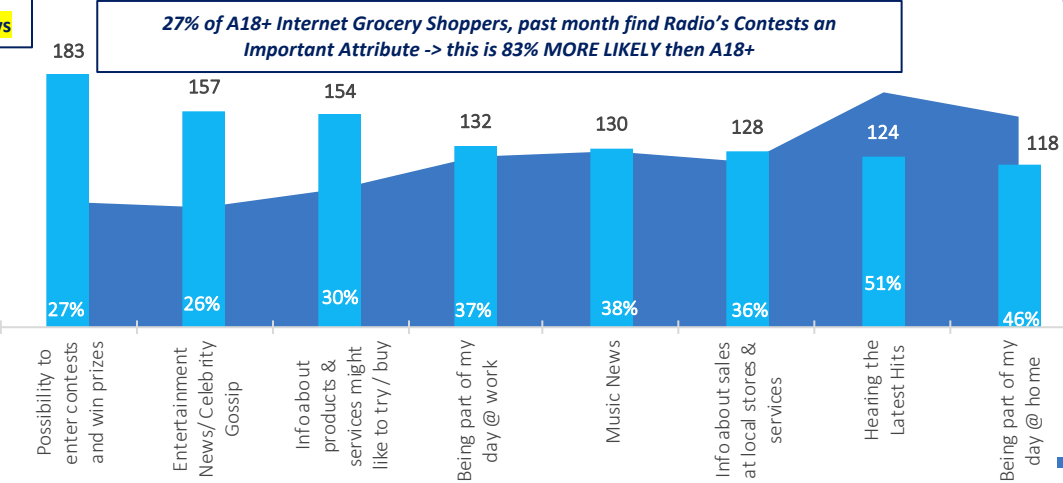
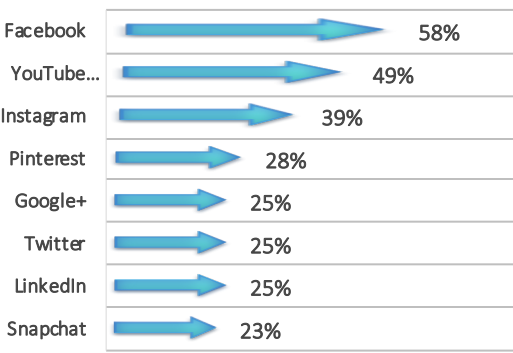


Comparing to other audio platforms - past 7 days - AM/FM Radio is @ 85% vs 40% for Music Streaming Video Service e.g. YouTube



Listen to Radio while living their lives

RADIO delivers 85% WEEKLY of A18+ that shopped at internet grocery stores in the past month - a higher % than popular Social Media websites deliver in past 7 days

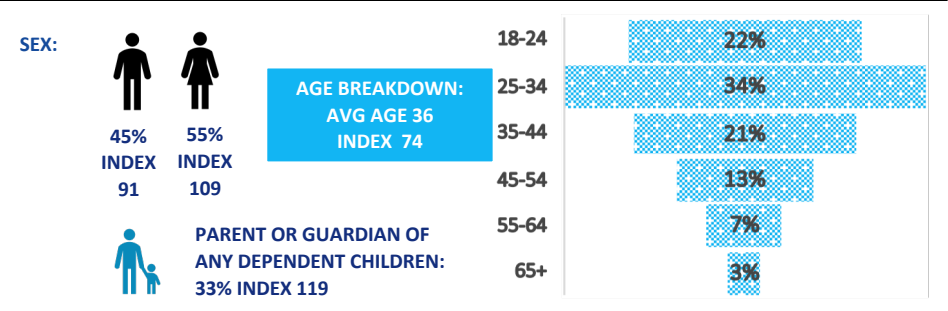


A18+ Shopped Internet Grocery Store past month:	Later that same day	Later that same week	More than a week later
Radio Commercial motivation to do a general Internet/online search:	291	248	221
Radio Commercial motivation to visit a specific website:	335	242	236
Radio Commercial motivation to visit a store/business:	250	218	165
Radio Local-on-air radio discussion motivation to access a website:	269	243	214
Radio Local-on-air radio discussion motivation to attend an event:	436	227	210
Radio Local-on-air radio discussion motivation to visit a store/business:	355	239	217
Purchases Time exposed to media before purchase (< 30 mins): Radio Index 100			
Purchases Time exposed to media before purchase (30 mins+): Radio Index 170			
Purchases Time exposed to media before purchase (made purchase any store/past 24 hrs): Index 124			



RADIO REACHES 84% WEEKLY: A18+ ORDERED FOOD USING AN ONLINE RESTAURANT DELIVERY SERVICE IN THE PAST MONTH

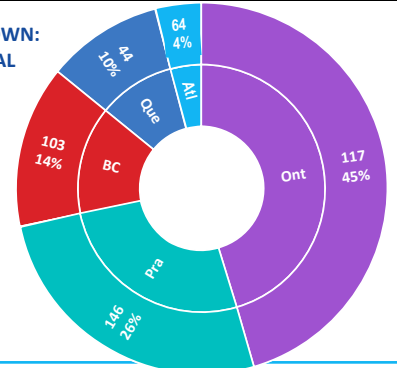
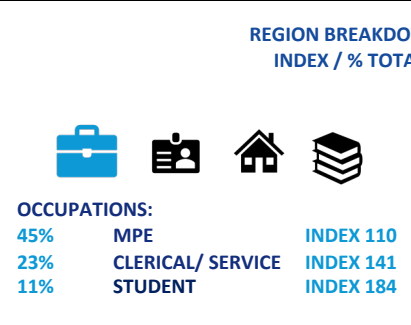
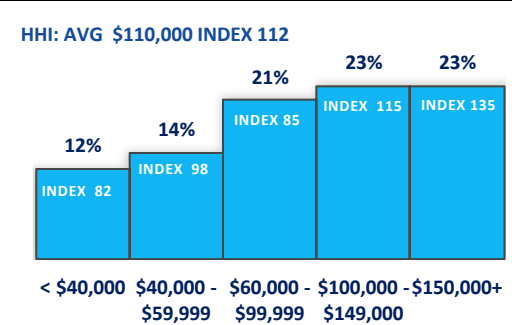
CONSUMER PROFILE  
RADIO WORKS - YOUR TARGET LISTENS TO RADIO



APPROX 9% OF CANADIANS A18+ HAVE ORDERED FOOD USING ONLINE DELIVERY APP IN PST MONTH

INDEX

209
197
132
77
38
14

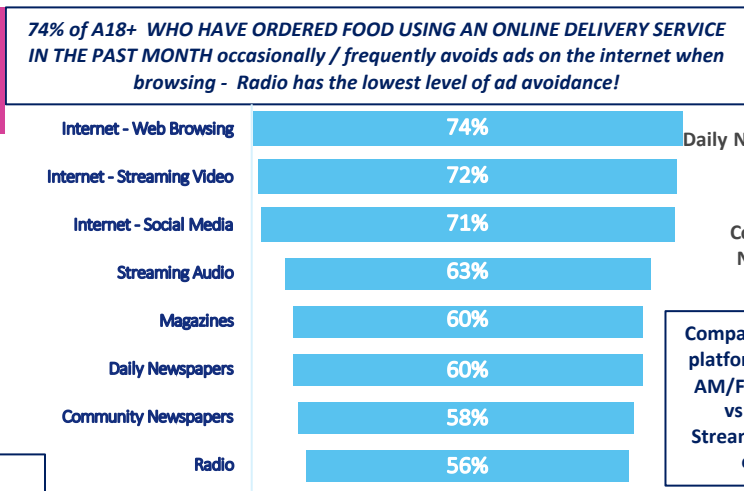


**A18+ WHO HAVE ORDERED FOOD USING AN ONLINE DELIVERY APP IN THE PAST MONTH:**

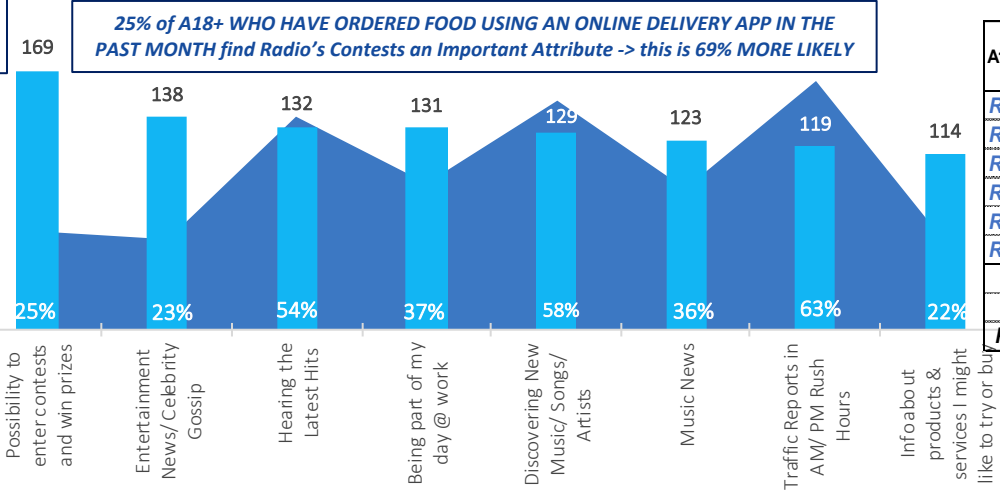
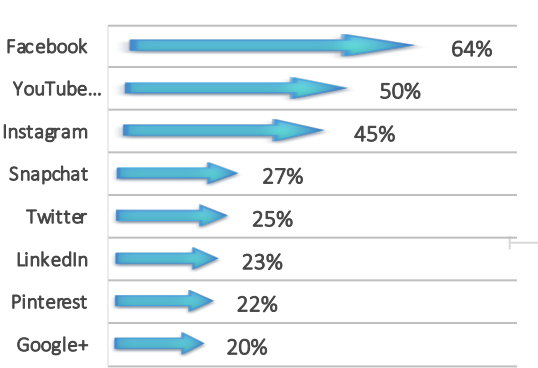
**84% of them are REACHED WEEKLY by RADIO**

**18% of their MEDIA TIME\* is spent with RADIO**

**69% of them were EXPOSED to RADIO YESTERDAY**

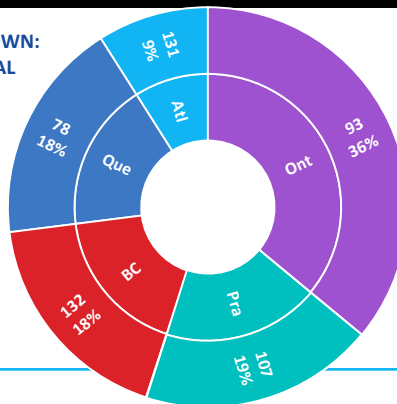
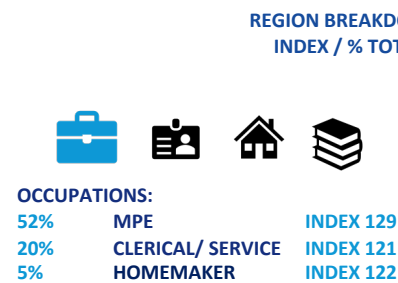
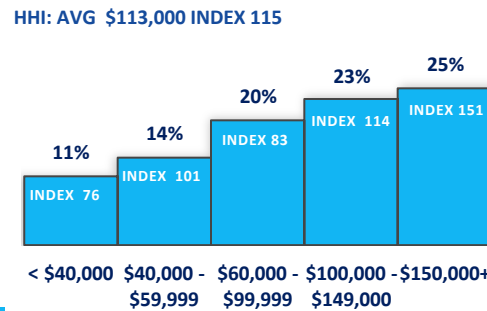
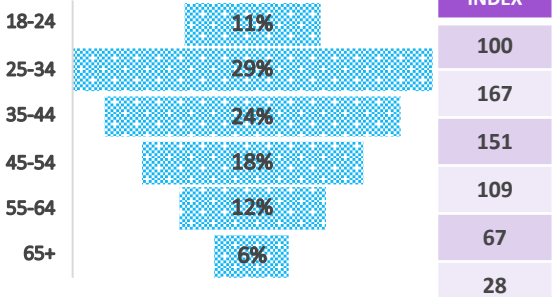
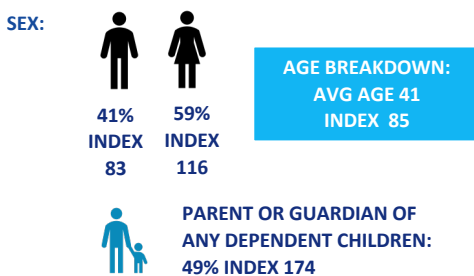


RADIO delivers 84% WEEKLY of A18+ WHO HAVE ORDERED FOOD USING AN ONLINE DELIVERY APP IN THE PAST MONTH - a higher % than popular Social Media websites deliver in past 7 days



A18+ WHO HAVE ORDERED FOOD USING AN ONLINE DELIVERY APP IN THE PAST MONTH:	Later that same day	Later that same week	More than a week later
Radio Commercial motivation to do a general Internet/online search:	170	157	218
Radio Commercial motivation to visit a specific website:	172	164	220
Radio Commercial motivation to visit a store/business:	157	136	174
Radio Local-on-air radio discussion motivation to access a website:	154	152	200
Radio Local-on-air radio discussion motivation to attend an event:	256	153	147
Radio Local-on-air radio discussion motivation to visit a store/business:	213	127	161
Purchases Time exposed to media before purchase (< 30 mins): Radio Index 118			
Purchases Time exposed to media before purchase (30 mins+): Radio Index 124			
Purchases Time exposed to media before purchase (made purchase any store/past 24 hrs): Index 118			

RADIO REACHES 89% WEEKLY: A18+ ORDERED ONLINE MEAL KIT/ PREP FOOD DELIVERY SERVICE IN THE PAST MONTH



APPROX 3% OF CANADIANS A18+ HAVE ORDERED ONLINE MEAL KIT/ PREP FOOD DELIVERY SERVICE IN THE PAST MONTH

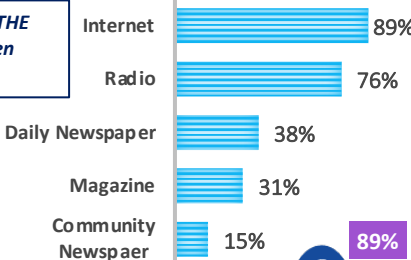
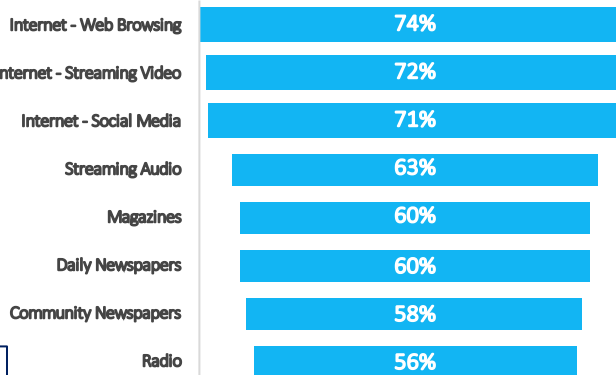
A18+ WHO HAVE ORDERED ONLINE MEAL KIT/ PREP FOOD DELIVERY SERVICE IN THE PAST MONTH:

89% of them are REACHED WEEKLY by RADIO

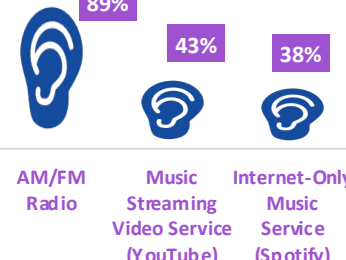
21% of their MEDIA TIME\* is spent with RADIO

76% of them were EXPOSED to RADIO YESTERDAY

74% of A18+ WHO HAVE ORDERED MEAL KIT/PREP FOOD DELIVERY IN THE PAST MONTH occasionally / frequently avoids ads on the internet when browsing - Radio has the lowest level of ad avoidance!

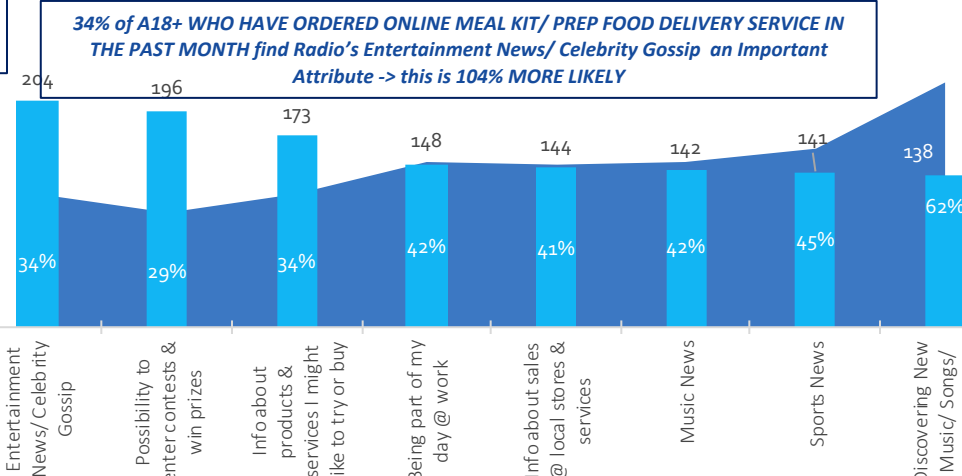
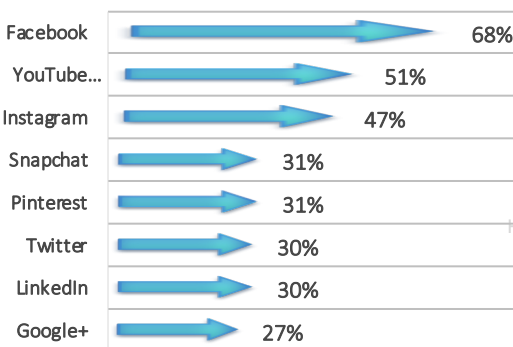


Comparing to other audio platforms - past 7 days - AM/FM Radio is @ 89% vs 43% for Music Streaming Video Service e.g. YouTube



Listen to Radio while living their lives

RADIO delivers 89% WEEKLY of A18+ WHO HAVE ORDERED ONLINE MEAL KIT/ PREP FOOD DELIVERY SERVICE IN THE PAST MONTH- a higher % than popular Social Media websites deliver in past 7 days



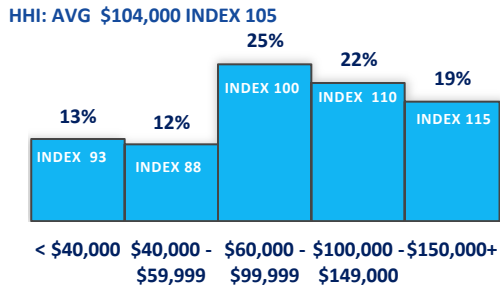
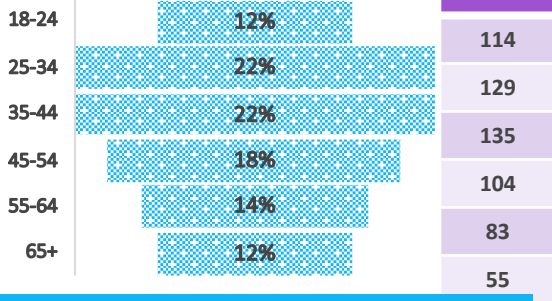
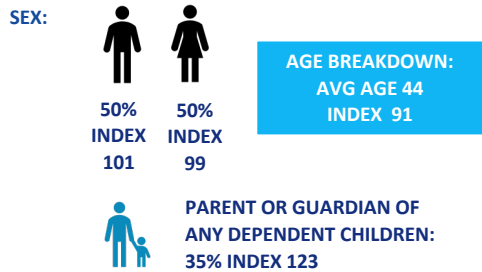
A18+ WHO HAVE ORDERED ONLINE MEAL KIT/ PREP FOOD DELIVERY SERVICE IN THE PAST MONTH	Later that same day	Later that same week	More than a week later
Radio Commercial motivation to do a general Internet/online search:	279	264	331
Radio Commercial motivation to visit a specific website:	301	307	450
Radio Commercial motivation to visit a store/business:	285	202	248
Radio Local-on-air radio discussion motivation to access a website:	266	260	310
Radio Local-on-air radio discussion motivation to attend an event:	570	300	253
Radio Local-on-air radio discussion motivation to visit a store/business:	426	245	297
Purchases Time exposed to media before purchase (< 30 mins): Radio Index 119			
Purchases Time exposed to media before purchase (30 mins+): Radio Index 184			
Purchases Time exposed to media before purchase (made purchase any store/past 24 hrs): Index 128			

SOURCE: NUMERIS RTS CANADA FALL 2019/ A18+ / TOTAL CANADA - ORDERED ONLINE MEAL KIT/ PREP FOOD DELIVERY SERVICE IN THE PAST MONTH

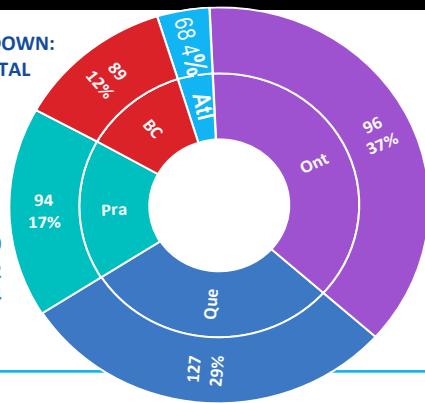


RADIO REACHES 86% WEEKLY: A18+ ORDERED HOME DELIVERY FROM A RESTAURANT IN THE PAST MONTH

CONSUMER PROFILE



REGION BREAKDOWN: INDEX / % TOTAL



APPROX 28% OF CANADIANS A18+ HAVE ORDERED HOME DELIVERY FROM A RESTAURANT IN THE PAST MONTH

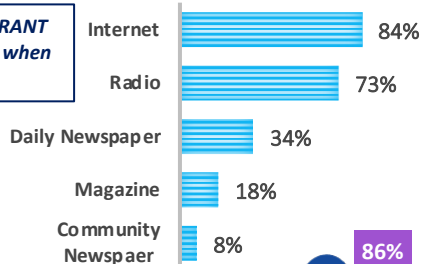
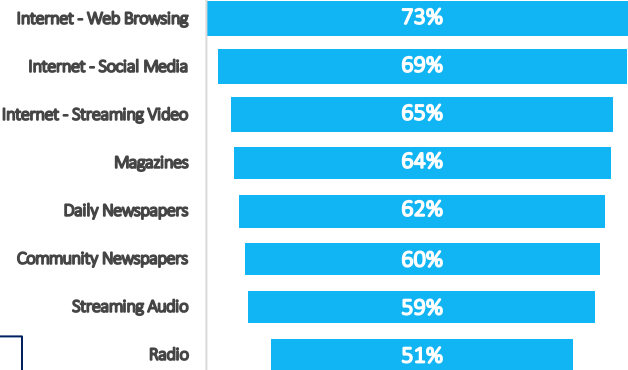
A18+ WHO HAVE ORDERED HOME DELIVERY FROM A RESTAURANT IN THE PAST MONTH:

86% of them are REACHED WEEKLY by RADIO

21% of their MEDIA TIME\* is spent with RADIO

73% of them were EXPOSED to RADIO YESTERDAY

73% of all A18+ WHO HAVE ORDERED HOME DELIVERY FROM A RESTAURANT IN THE PAST MONTH occasionally / frequently avoids ads on the internet when browsing - Radio has the lowest level of ad avoidance!



Comparing to other audio platforms - past 7 days - AM/FM Radio is @ 86% vs 28% for Music Streaming Video Service e.g. YouTube

Radio Reaches 73% Yesterday of your Target



AM/FM Radio



Music Streaming Video Service (YouTube)

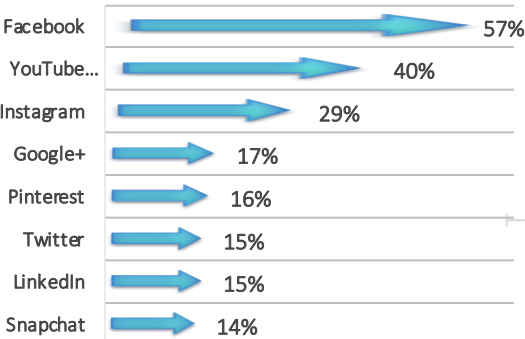


Internet-Only Music Service (Spotify)

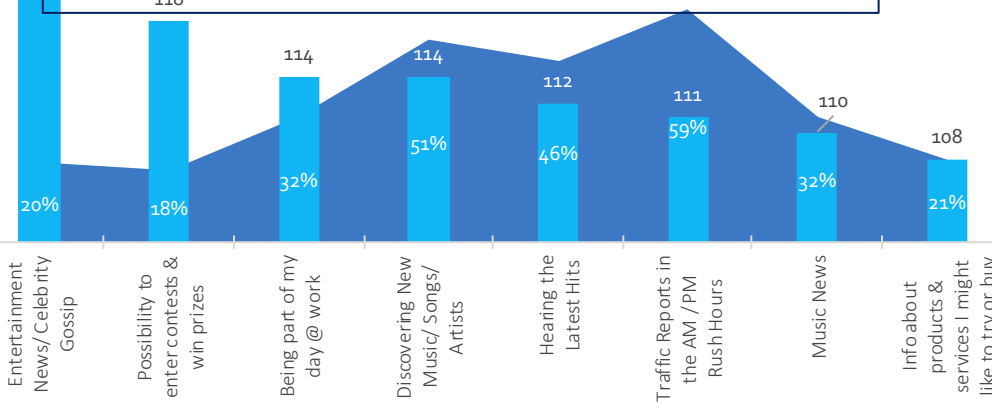


Listen to Radio while living their lives

RADIO delivers 86% WEEKLY of A18+ ORDERED HOME DELIVERY FROM A RESTAURANT IN THE PAST MONTH - a higher % than popular Social Media websites deliver in past 7 days



20% of A18+ WHO HAVE ORDERED HOME DELIVERY FROM A RESTAURANT IN THE PAST MONTH find Radio's Entertainment News/ Celebrity Gossip an Important Attribute -> this is 20% MORE LIKELY



A18+ WHO HAVE ORDERED HOME DELIVERY FROM A RESTAURANT IN THE PAST MONTH:	Later that same day	Later that same week	More than a week later
Radio Commercial motivation to do a general Internet/online search:	124	131	139
Radio Commercial motivation to visit a specific website:	121	126	144
Radio Commercial motivation to visit a store/business:	124	110	125
Radio Local-on-air radio discussion motivation to access a website:	120	120	132
Radio Local-on-air radio discussion motivation to attend an event:	148	118	118
Radio Local-on-air radio discussion motivation to visit a store/business:	141	110	120
Purchases Time exposed to media before purchase (< 30 mins): Radio Index 108			
Purchases Time exposed to media before purchase (30 mins+): Radio Index 106			
Purchases Time exposed to media before purchase (made purchase any store/past 24 hrs): Index 103			

SOURCE: NUMERIS RTS CANADA FALL 2019/ A18+ / TOTAL CANADA - ORDERED HOME DELIVERY FROM A RESTAURANT IN THE PAST MONTH



# 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.

06

## **RADIO CONNECTS**

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.