

Radio and Pet Ownership

AM/FM Radio connects with people
who have pets

November 2020



AM/FM Radio connects with Canadian pet lovers.

7.5 Million (57%) Canadian households have pets and Pet Owners will spend almost \$2B on their dogs and cats in 2020.

Radio reaches 88% A18+ who have shopped at a pet supply store in past year (in-store/online), and is higher than the reach of any of the social media platforms over a 7-day period.

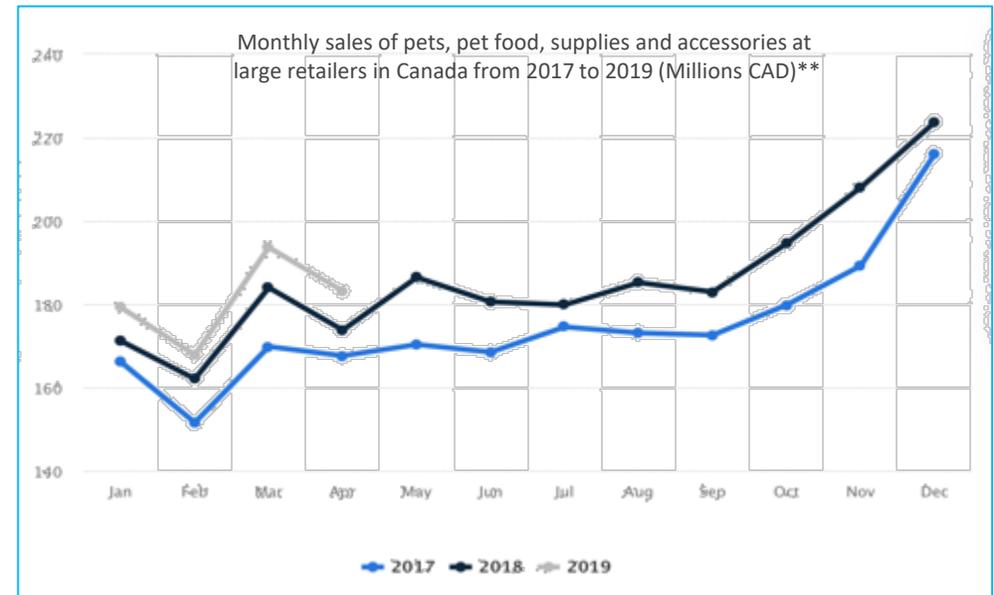
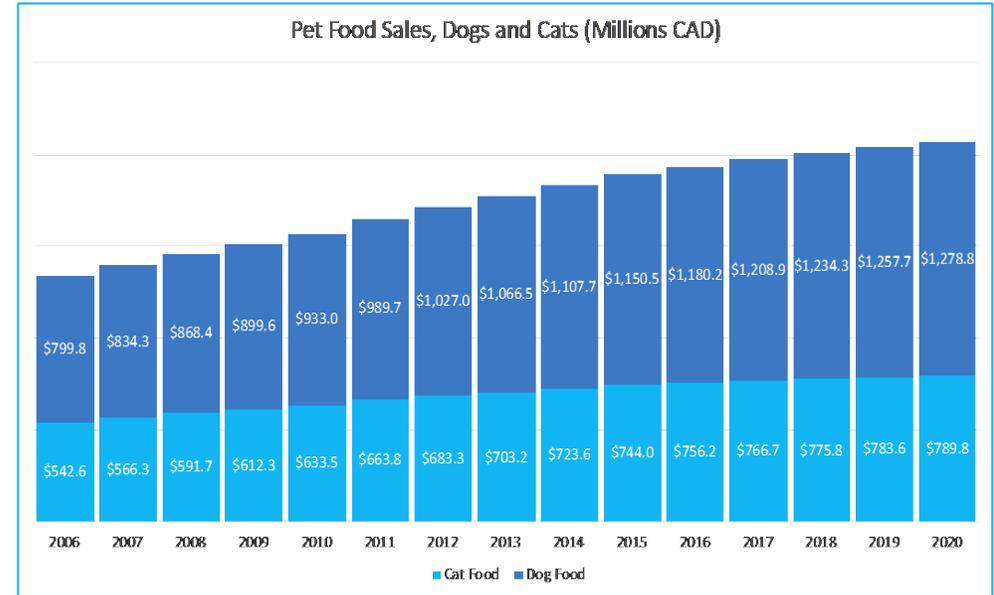
When it comes to audio in general, AM/FM Radio reaches pet owners more than any other audio platform

Ads on Radio are the least avoided (49%) by pet owners vs. any other media platform; ads on the internet (74%) and social media (70%) are the most avoided

Pet owners take action when they hear an ad on AM/FM Radio:

- Go online to search that same day 113i, and even more than a week later 115i
- Visit a specific website later that week 117i
- Visit the store or business that same day 124i, or even a week later 116i
- Made a purchase within past 24 hours after exposure to Radio 108i

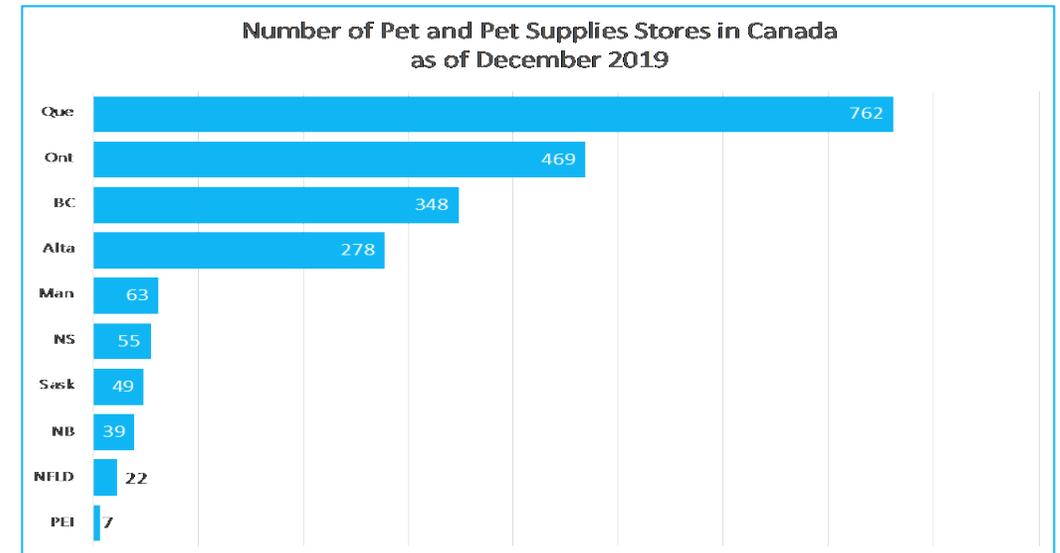
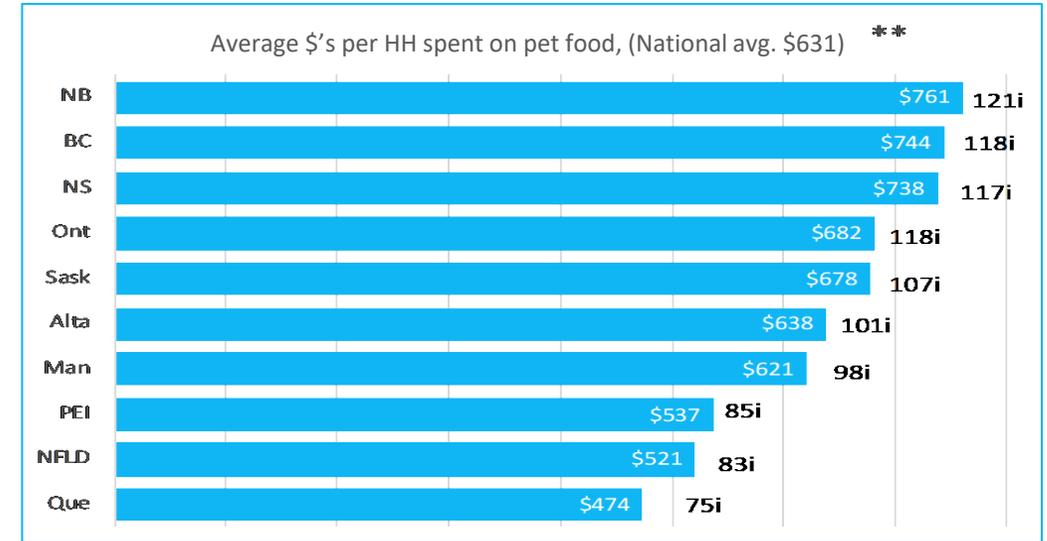
Pet Food sales alone, is a multi billion-dollar industry with expected sales of almost \$2B in 2020, and is only expected to grow.



Overall Canada is home to roughly 5.9 million dogs and 7.9 million cats.

9% of Canadians owned other types of pets, including fish, birds, small mammals such as hamsters and reptiles.

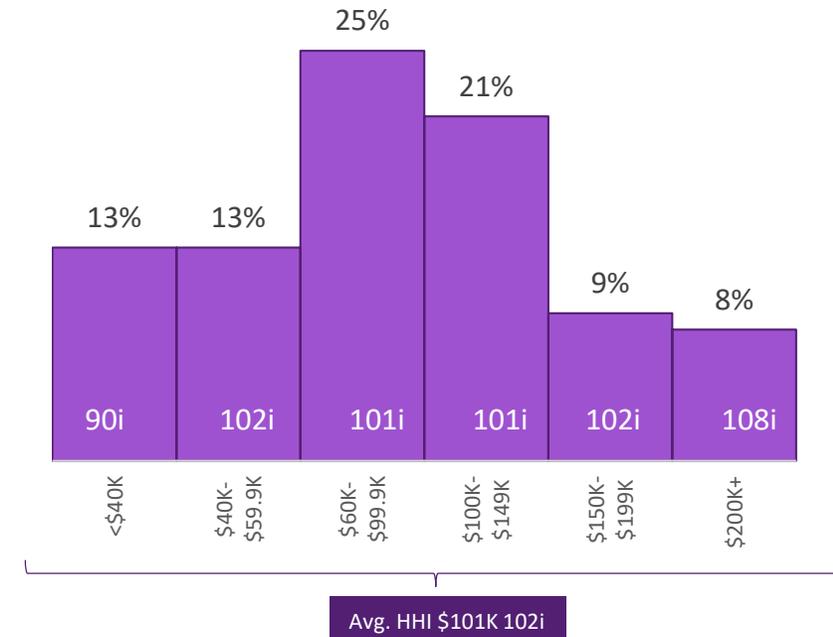
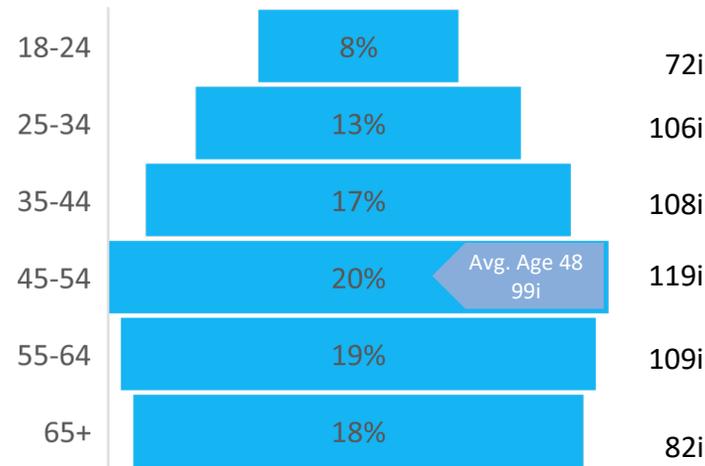
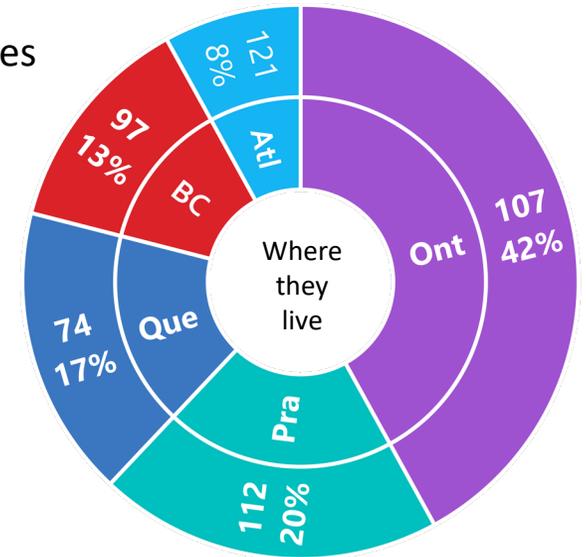
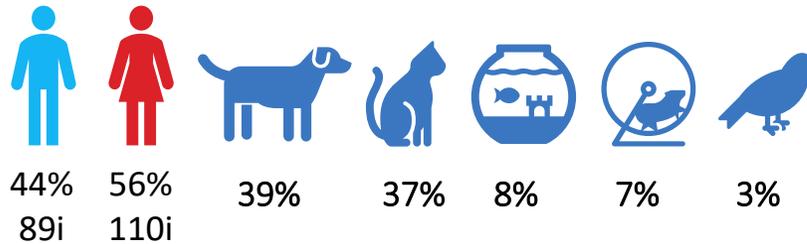
Cageless pet boarding, dog boarding, pet nanny, dog kennel, dog sitting, cat sitting, pet training school and other pet care services are among the most popular services Canadian pet owners seek for their pets.



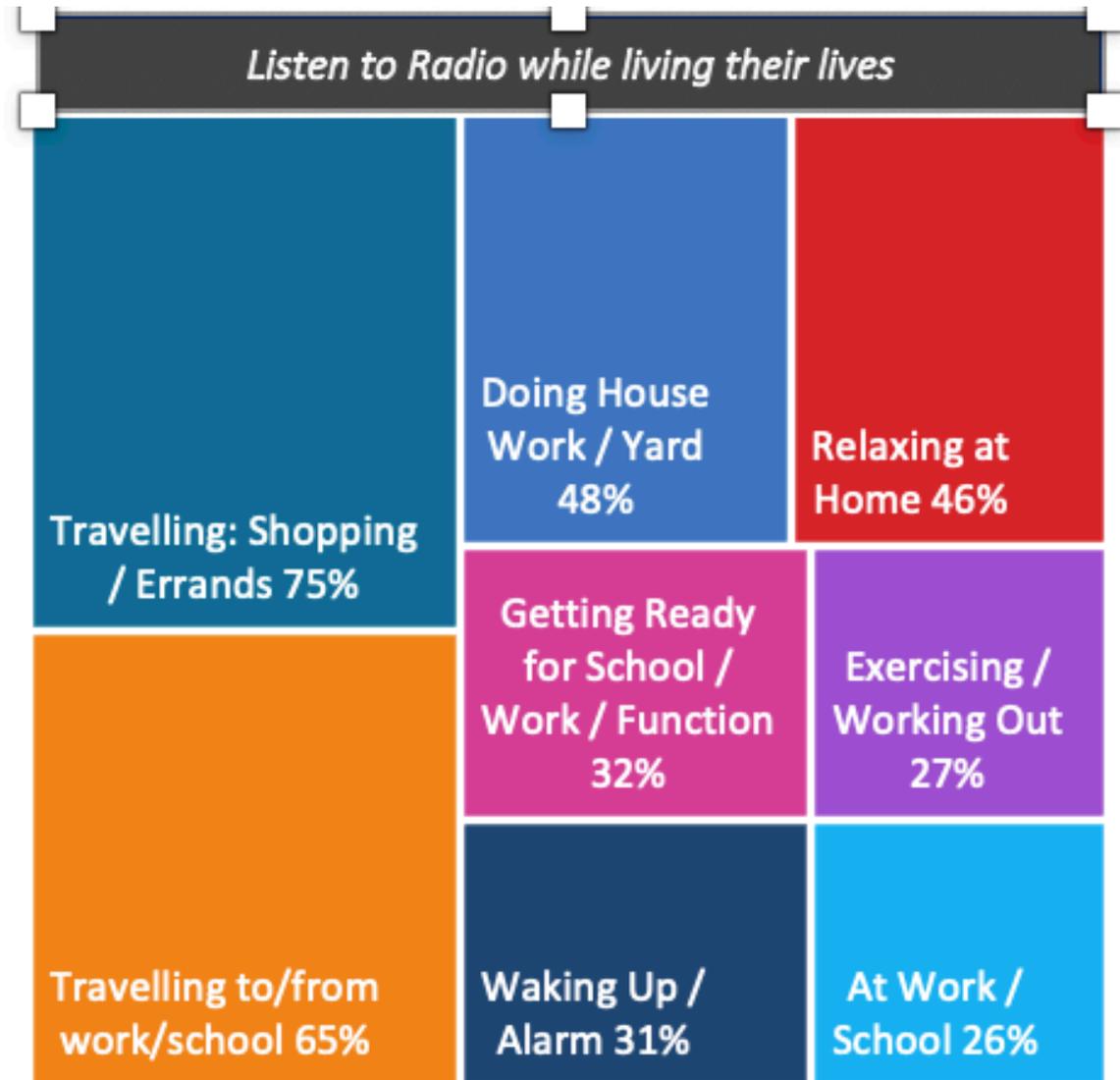
53% of Canadians A18+ have shopped at a pet supply store in the past YEAR.

AM/FM Radio reaches 88% of them on a weekly basis.

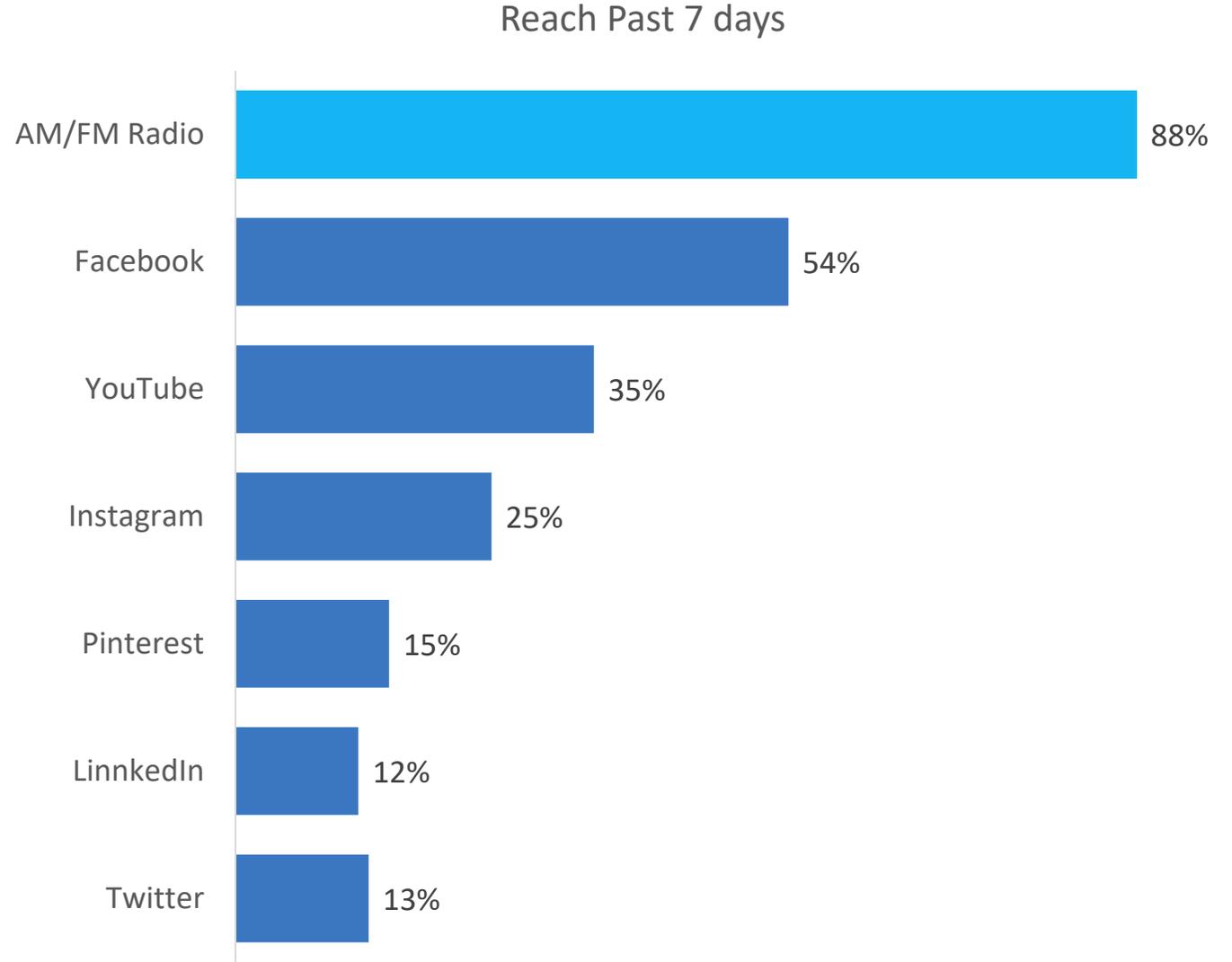
AM/FM Radio Listeners who have shopped in Pet Stores



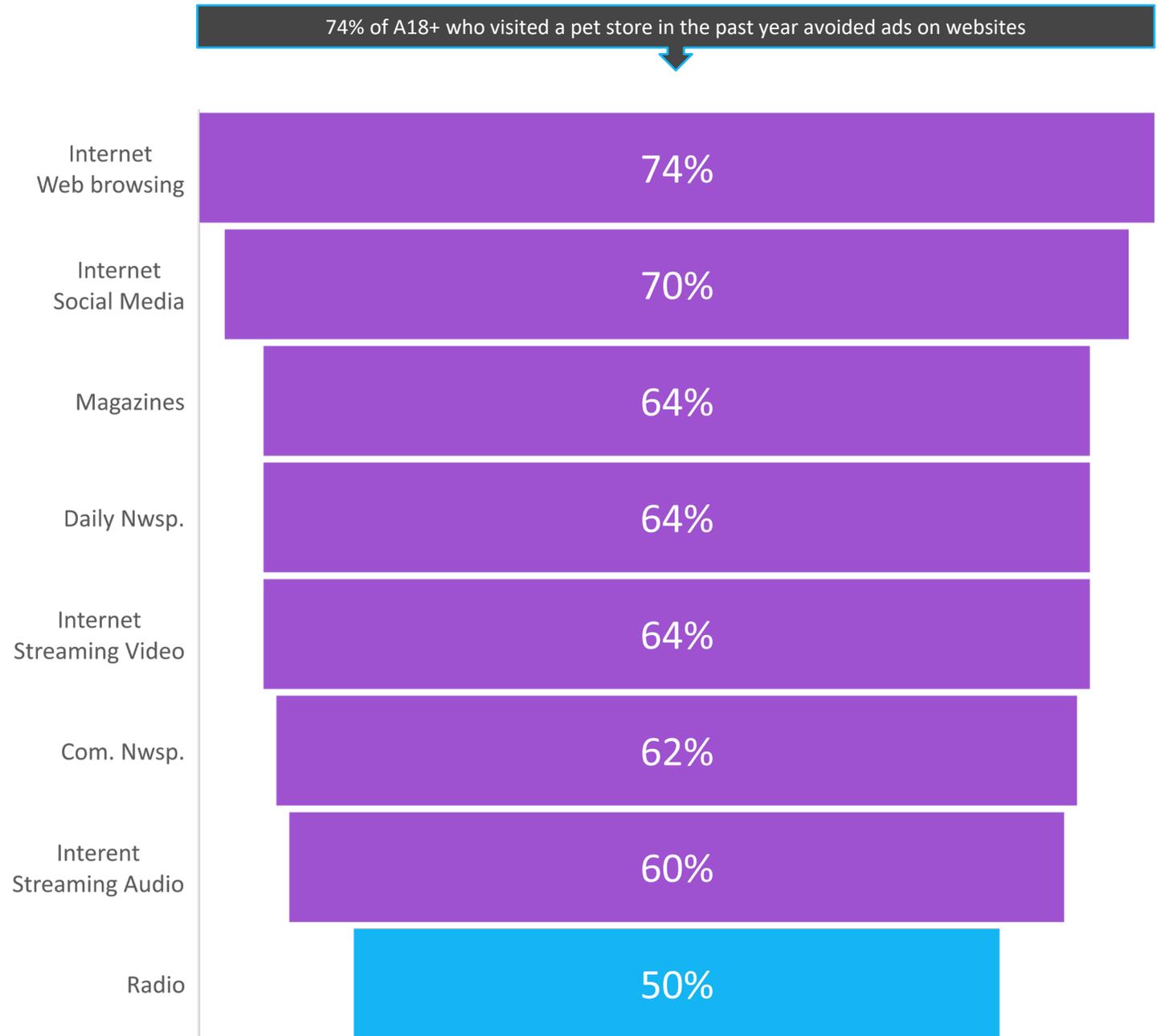
88% of Canadians who shopped in a pet store are reached weekly by AM/FM Radio. 23% of their MEDIA TIME* is spent with RADIO, and 74% were EXPOSED to RADIO YESTERDAY



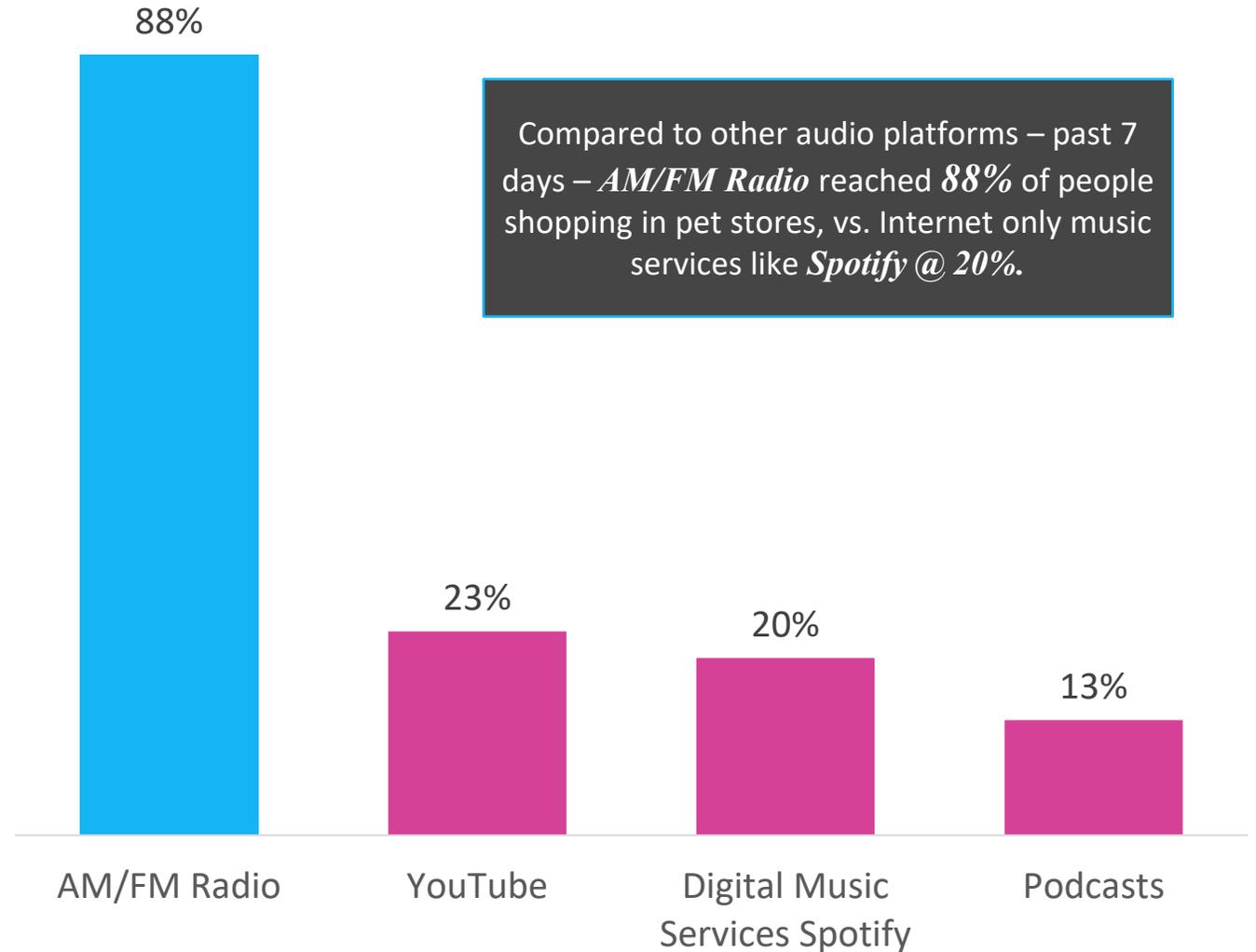
Radio delivers more reach than any popular social media websites against those purchasing HH cleaning products.



When it comes to ad avoidance, ads on AM/FM Radio are the *least avoided* by those who have shopped for pet products in the past year



AM/FM Radio
delivers more
reach than any
other audio
platform.



Hearing an ad
on AM/FM
Radio motivates
pet owners to
take action.

A18+ WHO HAVE SHOPPED AT A PET STORE IN THE PAST YEAR:	Later that same day	Later that same week	More than a week later
<i>Radio Commercial motivation to do a general Internet/online search:</i>	113	113	115
<i>Radio Commercial motivation to visit a specific website:</i>	114	114	117
<i>Radio Commercial motivation to visit a store/business:</i>	118	110	110
<i>Radio Local-on-air radio discussion motivation to access a website:</i>	108	107	112
<i>Radio Local-on-air radio discussion motivation to attend an event:</i>	117	115	117
<i>Radio Local-on-air radio discussion motivation to visit a store/business:</i>	124	107	116
<i>Purchases Time exposed to media before purchase (< 30 mins): Radio Index 112</i>			
<i>Purchases Time exposed to media before purchase (30 mins+): Radio Index 106</i>			
<i>Purchases Time exposed to media before purchase (made purchase any store/past 24 hrs): Index 108</i>			

Radio connects with people who shop for OTC products.

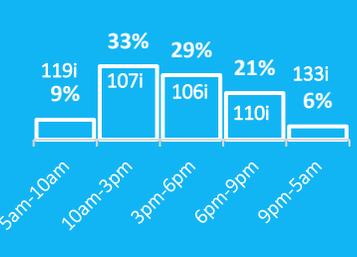
- Radio reaches **87+%** of A18+ weekly, who have OTC medications in the past 7 days
- **22+% of their media time is spent with AM/FM Radio**
 - *Radio's weekly reach* against these consumers who use OTC remedies is *higher than the reach of any of the social media platforms* over the same time period
 - Radio reaches this consumer than any other audio platform
 - Ads on *Radio are the least avoided* by this consumers vs. any other media platform; ads on the internet (72+%) and social media (68+%) and magazines (63+%) are the most avoided
 - When this consumer takes action after hearing ads on AM/FM Radio, they take action:
 - Visit a specific website same day, later that week, and even 7+ days
 - Hearing ads on the radio also motivates them to visit specific stores or locations

RADIO REACHES 87% WEEKLY: A18+ WHO HAVE USED COLD/ COUGH/ SINUS REMEDIES IN PAST 30 DAYS (NON-PRESCRIPTION)

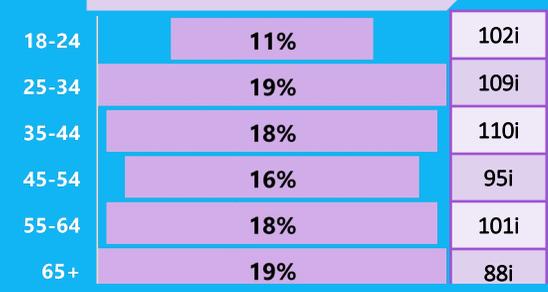
CONSUMER PROFILE



WHEN DO THEY SHOP AT DRUG STORES BY DAYPART:



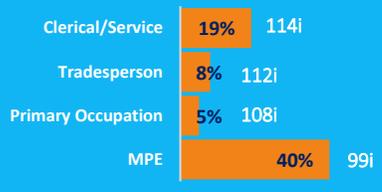
AGE BREAKDOWN: AVG AGE 47: 98i



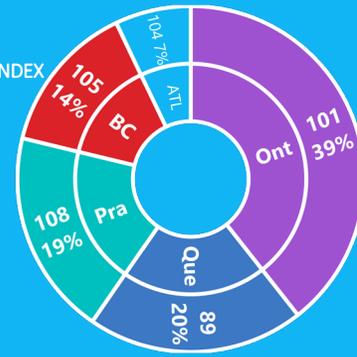
HHI: AVG \$89,000 90i



OCCUPATIONS:



REGION BREAKDOWN: INDEX / % TOTAL



APPROX 28% OF CANADIANS A18+ HAVE USED COLD/ COUGH/ SINUS REMEDIES IN THE PAST 30 DAYS

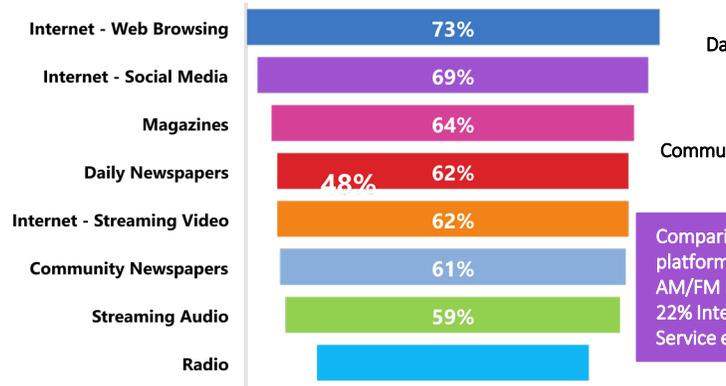
A18+ WHO HAVE USED COLD/ COUGH/ SINUS REMEDIES IN PST 30 DAYS:

87% are REACHED WEEKLY by RADIO
22% of their MEDIA TIME* is spent with RADIO
73% were EXPOSED to RADIO YESTERDAY

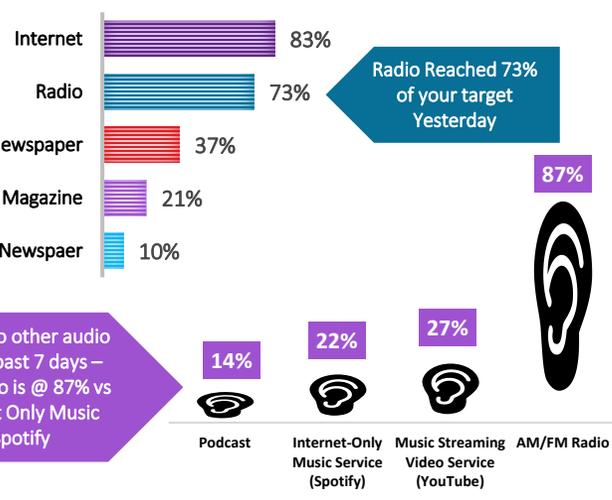
Radio delivers **87% weekly reach** against A18+ who have used cold/ cough/ sinus remedies in past 30 days – a higher % than popular social media websites delivered in past 7 days

RADIO HAS LOWEST LEVEL OF AD AVOIDANCE!

73% of all A18+ HAVE USED COLD/ COUGH, SINUS REMEDIES IN THE PAST 30 DAYS occasionally / frequently AVOID ADS ON THE INTERNET WHEN BROWSING



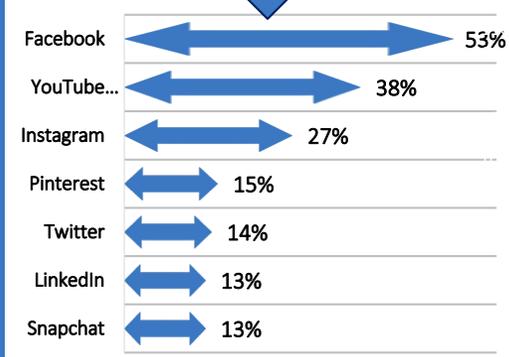
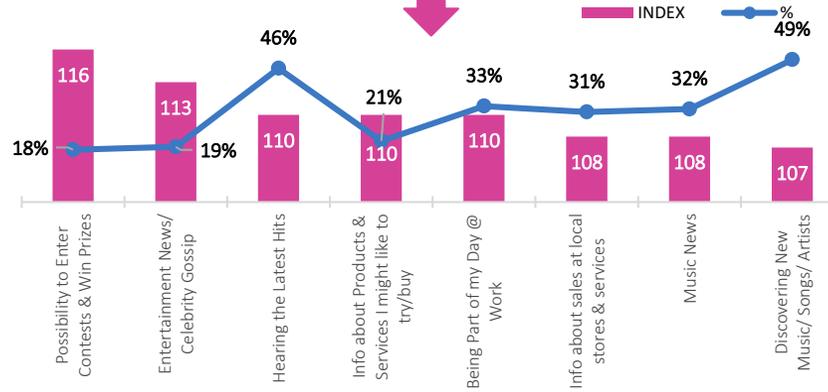
Comparing to other audio platforms – past 7 days – AM/FM Radio is @ 87% vs 22% Internet Only Music Service e.g. Spotify



Listen to Radio while living their lives



18% of A18+ who have used cold/ cough/ sinus remedies in the past 30 days finds Radio's Contests & Prizes an important attribute -> 16% more likely



A18+ WHO HAVE USED COLD/ COUGH/ SINUS REMEDIES IN THE PAST 30 DAYS (INDEX):	Later that same day	Later that same week	More than a week later
Radio Commercial motivation to purchase a specific website:	117	116	130
Radio Commercial motivation to write a specific website:	110	120	155
Radio Commercial motivation to write a store/business:	130	115	123
Radio Local-on-air radio discussion motivation to access a website:	116	117	140
Radio Local-on-air radio discussion motivation to attend an event:	149	125	121
Radio Local-on-air radio discussion motivation to visit a store/business:	147	121	122
Purchases Time exposed to media before purchase (<30 mins): Radio Index 105			
Purchases time exposed to media before purchase (30 mins+): Radio Index 108			
Purchases time exposed to media before purchase (made purchase any store/past 24 hrs): Index 109			

SOURCE: NUMERIS RTS CANADA SPRING 2020/ A18+ / TOTAL CANADA PERSONAL CARE – PERSONAL CARE ITEMS USED/PAST 30 DAYS – COLD/ COUGH/ SINUS REMEDIES (NON-PRESCRIPTION)*MEDIA MIX RADIO/ TV/ DAILY NEWSPAPER/ COMMUNITY NEWSPAPER / MAGAZINE/ INTERNET

RADIO WORKS - YOUR TARGET LISTENS TO RADIO

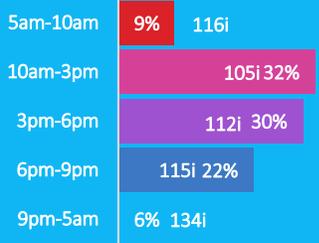
RADIO REACHES 88% WEEKLY: A18+ WHO HAVE USED SEASONAL USAGE OF ALLERGY/ SINUS MEDICATION IN PAST 30 DAYS

CONSUMER PROFILE

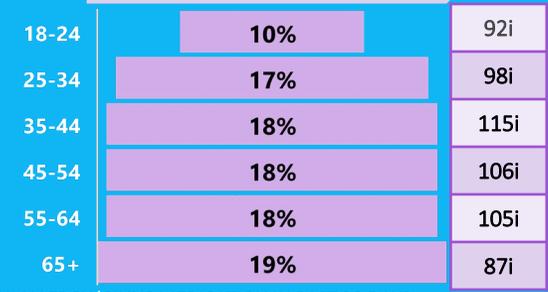


45% 92i
55% 108i

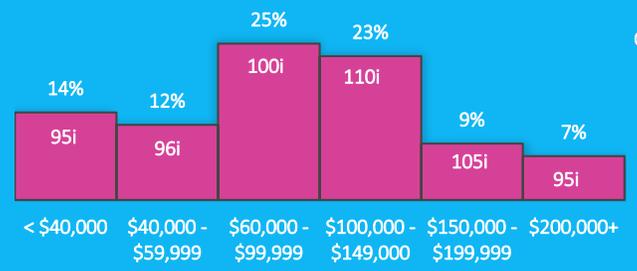
WHAT DAYPART DO THEY SHOP @ DRUG STORES:



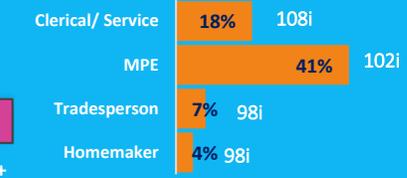
AGE BREAKDOWN: AVG AGE 48: 99i



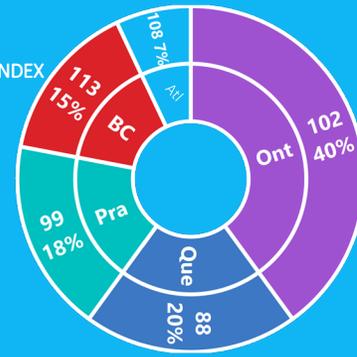
HHI: AVG \$100,000 101i



OCCUPATIONS:



REGION BREAKDOWN: INDEX / % TOTAL



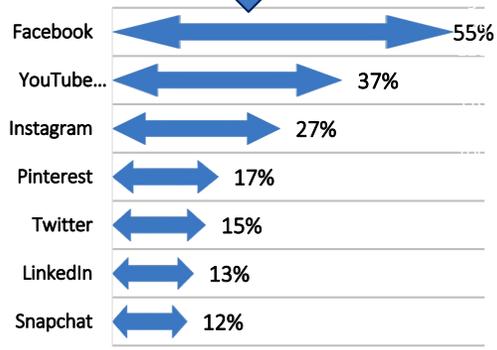
APPROX 21% OF CANADIANS A18+ HAVE USED SEASONAL ALLERGY/ SINUS MEDICATION IN PAST 30 DAYS

RADIO WORKS - YOUR TARGET LISTENS TO RADIO

A18+ WHO HAVE USED SEASONAL ALLERGY/ SINUS MEDICATION:

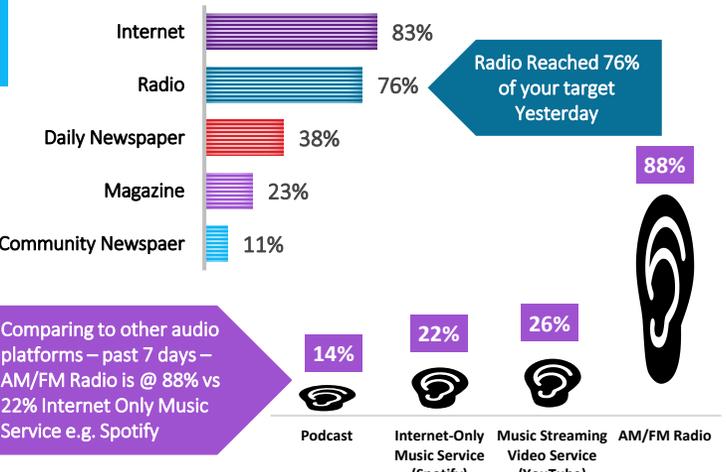
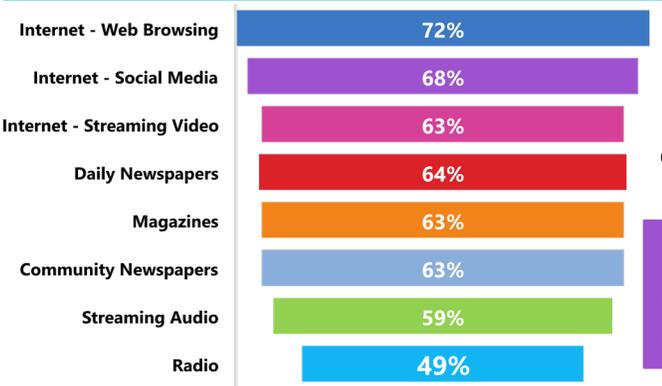
88% are REACHED WEEKLY by RADIO
22% of their MEDIA TIME* is spent with RADIO
76% were EXPOSED to RADIO YESTERDAY

Radio delivers **88% weekly reach** against A18+ WHO HAVE USED SEASONAL ALLERGY/ SINUS MEDICATION – a higher % than popular social media websites delivered in past 7 days



RADIO HAS THE LOWEST LEVEL OF AD AVOIDANCE!

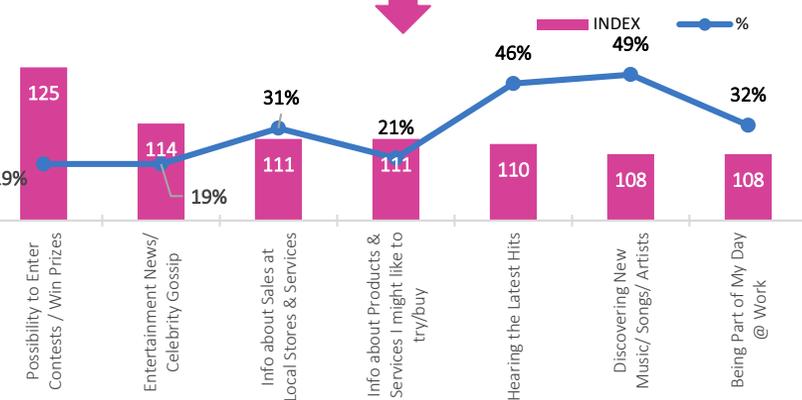
72% of all A18+ WHO HAVE USED SEASONAL ALLERGY/ SINUS MEDICATION occasionally / frequently AVOID ADS ON THE INTERNET WHEN BROWSING



Listen to Radio while living their lives



19% of A18+ WHO HAVE USED SEASONAL ALLERGY/ SINUS MEDICATION Radio's Sports News an important attribute -> 25% more likely



A18+ THAT HAVE USED SEASONAL USAGE OF ALLERGY/ SINUS MEDICATION IN PAST 30 DAYS (INDEX):	Later that same day	Later that same week	More than a week later
Radio Commercial motivation to visit a specific website	120	120	142
Radio Commercial motivation to visit a store/business	126	127	155
Radio Local on-air radio discussion motivation to access a website	140	129	136
Radio Local on-air radio discussion motivation to attend an event	128	130	142
Radio Local on-air radio discussion motivation to visit a store/business	167	130	129
Radio Local on-air radio discussion motivation to visit a store/business	156	142	140
Purchases Time exposed to media before purchase (<30 mins): Radio Index 111			
Purchases Time exposed to media before purchase (30 mins+): Radio Index 111			
Purchases Time exposed to media before purchase (made purchase any store/past 24 hrs): Index 109			

SOURCE: NUMERIS RTS CANADA SPRING 2020/ A18+ / TOTAL CANADA / PERSONAL CARE ITEMS USED/ PAST 30 DAYS SEASONALUSAGE OF ALLERGY/ SINUS MEICATION *MEDIA MIX RADIO/ TV/ DAILY NEWSPAPER/ COMMUNITY NEWSPAPER / MAGAZINE/ INTERNET

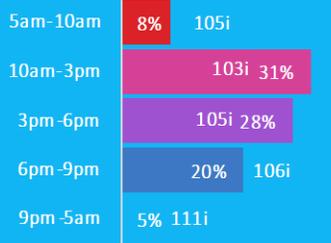
RADIO REACHES 88% WEEKLY: A18+ WHO HAVE USED HEADACHE REMEDIES/ PAIN RELIEVERS NON-PRESCRIPTION IN PAST 30 DAYS

CONSUMER PROFILE

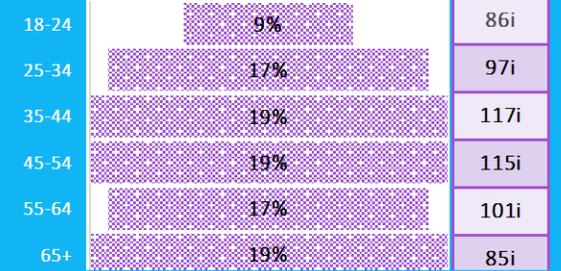


43% 88i
57% 112i

WHAT DAYPART DO THEY SHOP @ DRUG STORES:



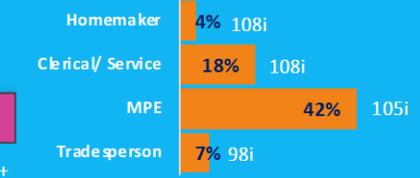
AGE BREAKDOWN: AVG AGE 48: 99i



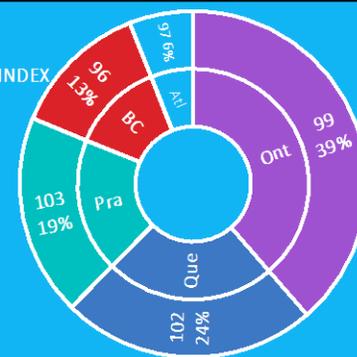
HHI: AVG \$101,000 102i



OCCUPATIONS:



REGION BREAKDOWN: INDEX / % TOTAL

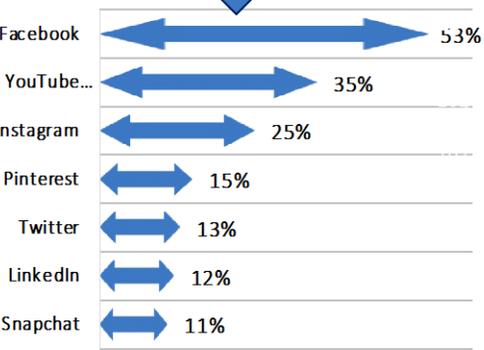


APPROX 59% OF CANADIANS A18+ HAVE USED HEADACHE REMEDIES/ PAIN RELIEVERS NP IN PAST 30 DAYS

A18+ WHO HAVE USED HEADACHE REMEDIES/ PAIN RELIEVERS NP :

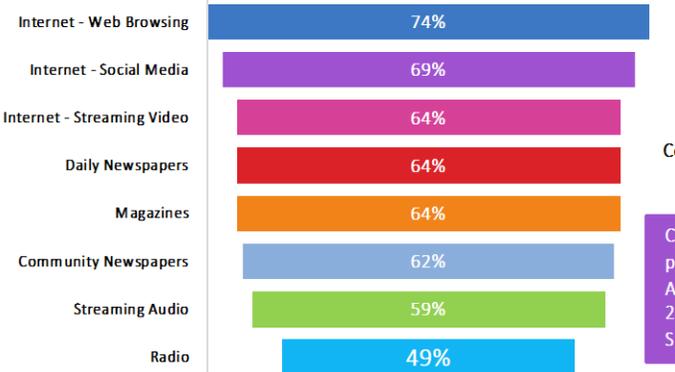
88% are REACHED WEEKLY by RADIO
23% of their MEDIA TIME* is spent with RADIO
74% were EXPOSED to RADIO YESTERDAY

Radio delivers **88% weekly reach** against A18+ WHO HAVE USED HEADACHE REMEDIES/ PAIN RELIEVER NP IN PAST 30 DAYS – a higher % than popular social media websites delivered in past 7 days

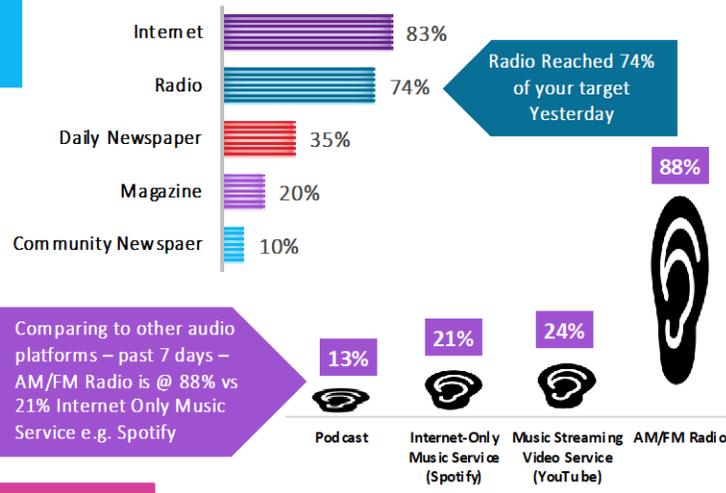


RADIO HAS THE LOWEST LEVEL OF AD AVOIDANCE!

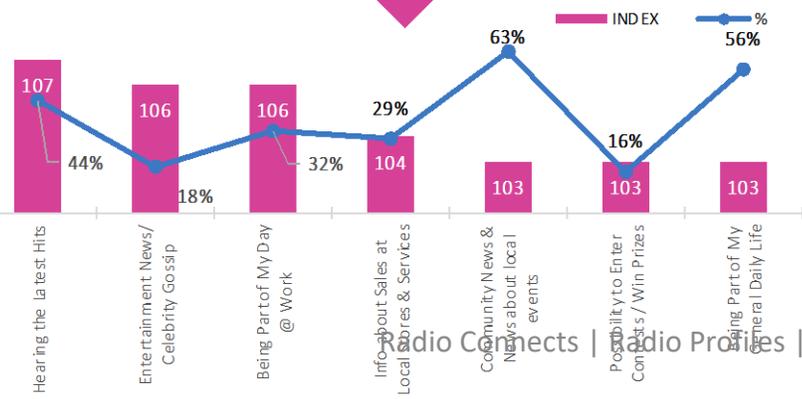
74% of all A18+ THAT HAVE USED HEADACHE REMEDIES/ PAIN RELIEVERS occasionally / frequently AVOID ADS ON THE INTERNET WHEN BROWSING



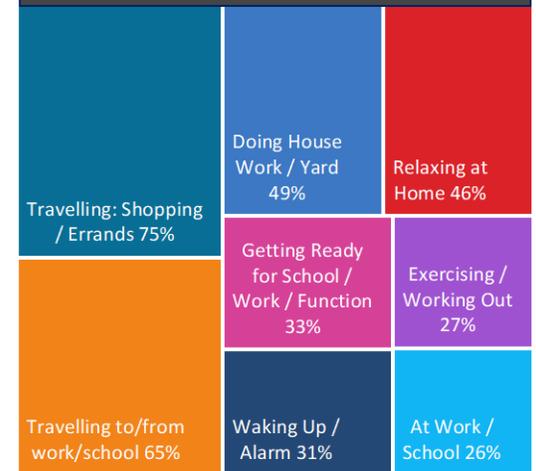
Comparing to other audio platforms – past 7 days – AM/FM Radio is @ 88% vs 21% Internet Only Music Service e.g. Spotify



44% of A18+ WHO HAVE USED HEADACHE REMEDIES/ PAIN RELIEVERS NP IN THE PAST 30 DAYS Radio's HEARING THE LATEST HITS an important attribute -> 7% more likely



Listen to Radio while living their lives



A18+ WHO HAVE USED HEADACHE REMEDIES/ PAIN RELIEVERS NP IN PAST 30 DAYS (INDEX):	Later than same day	Later than same week	More than a week later
Radio Commercial motivation to do a general Internet/online search:	106	109	111
Radio Commercial motivation to visit a specific website:	111	111	113
Radio Commercial motivation to visit a store/business:	111	112	111
Radio Local-on-air radio discussion motivation to access a website:	108	108	108
Radio Local-on-air radio discussion motivation to attend an event:	110	108	109
Radio Local-on-air radio discussion motivation to visit a store/business:	110	108	108
Purchases Time exposed to media before purchase (<30 mins): Radio Index 108			
Purchases Time exposed to media before purchase (30 mins+): Radio Index 105			
Purchases Time exposed to media before purchase (made purchase any store/past 24 hrs): Index 105			