

The logo for 'Radio Connects' features the word 'RADIO' in a bold, white, sans-serif font above the word 'CONNECTS' in a smaller, white, sans-serif font. The letter 'O' in 'RADIO' is stylized with a vertical bar through its center, divided into four colored segments: blue, purple, orange, and red.

RADIO
CONNECTS

A dark silhouette of a person's head in profile, facing right, with their mouth open as if speaking. The background is a gradient of dark purple and blue, with a glowing, horizontal, multi-colored wave pattern on the right side, suggesting a digital or audio signal.

RADIO IN THE DIGITAL AGE

2024

MUSIC STREAMERS ARE HEAVY LIVE RADIO LISTENERS BECAUSE THEY LIKE AUDIO CONTENT

80%

of Canadians who stream music daily listen to Live Radio

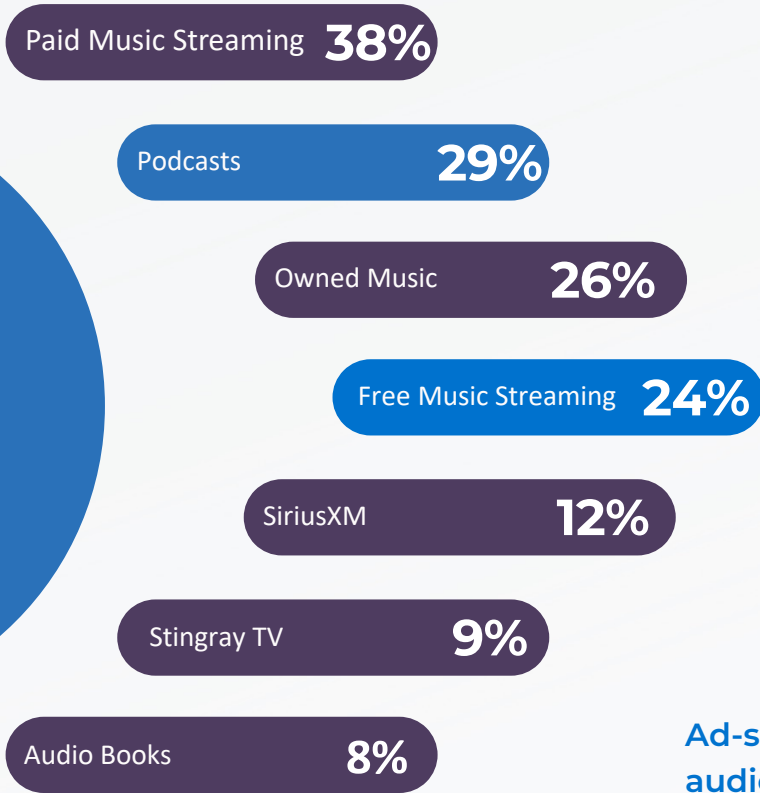
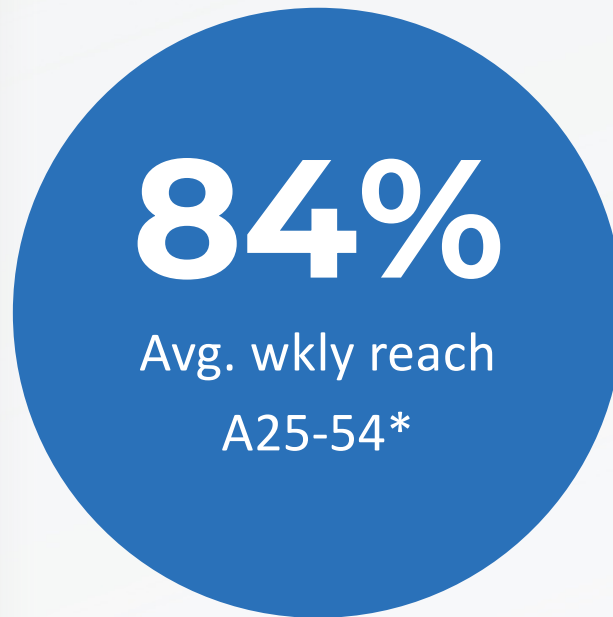
16%

say they listen to Live Radio for more than 2 hours a day





LIVE RADIO IS THE DOMINANT AUDIO PLATFORM TO REACH CANADIANS WITH AN AUDIO MESSAGE



Ad-supported
audio platforms





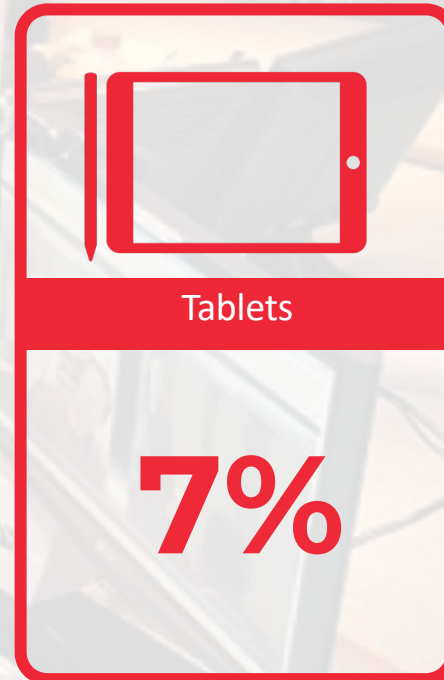
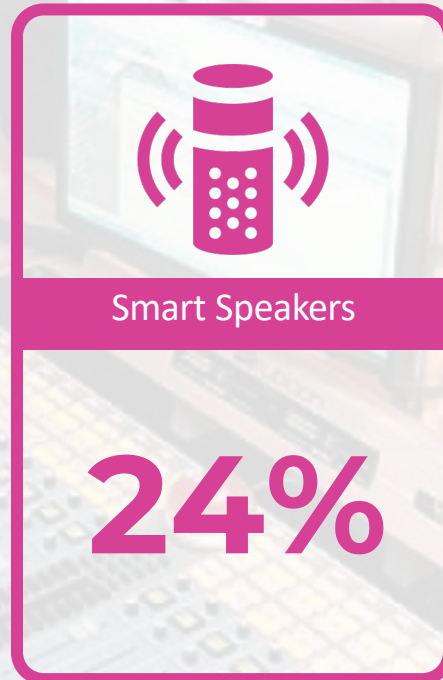
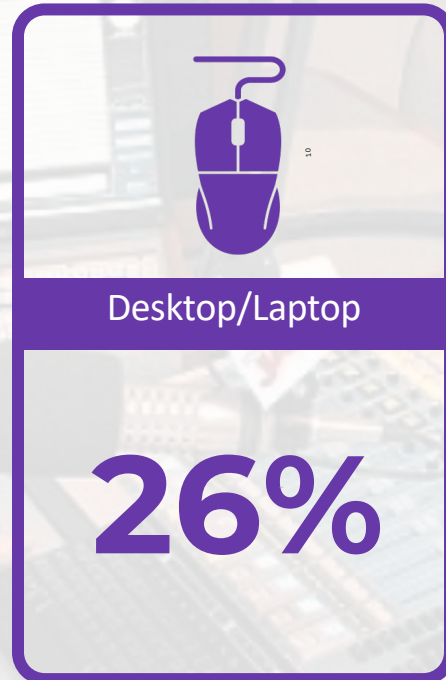
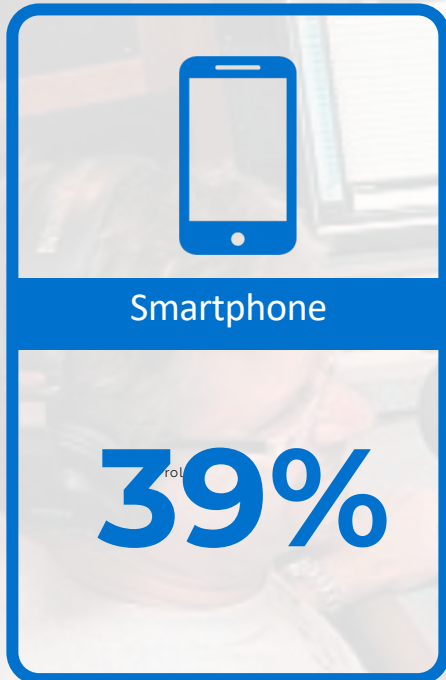
12% OF A18+ LISTENING TO LIVE RADIO IS NOW DONE BY TUNING TO BROADCAST RADIOS' DIGITAL STREAMS - THIS INCREASES TO 17% AMONG A18-34

Share of listening to Streamed Live Radio is up by 33% since Fall 2019



Source: Radio On The Move Fall 2023

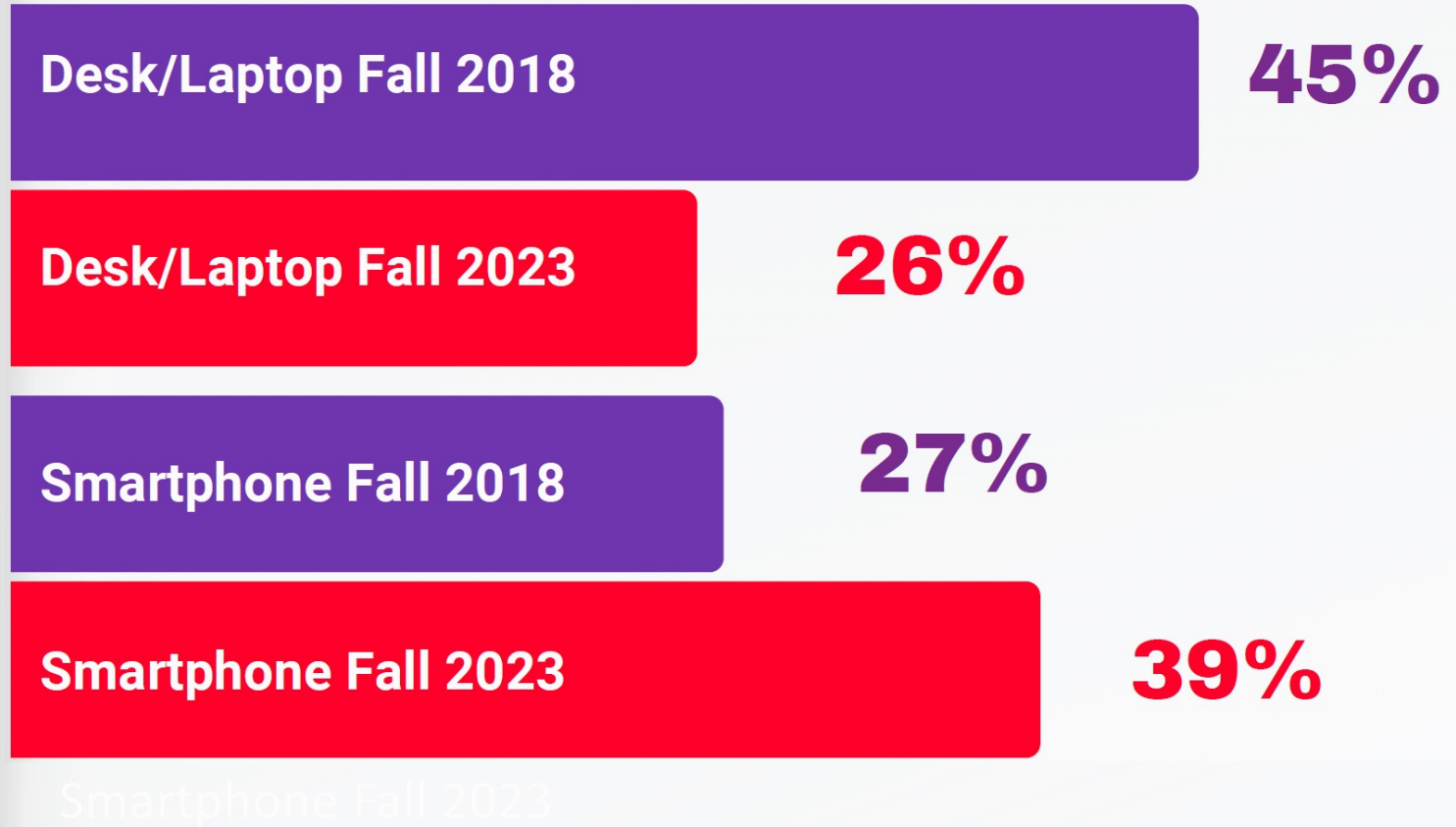
STREAMING LIVE RADIO BY DEVICE



Among A18+ who streamed Live Radio past week

Source: Radio On The Move Fall 2023

SMARTPHONES ARE REPLACING COMPUTERS FOR STREAMING LIVE RADIO



(Among 18+ who streamed AM/FM in the past week)

Source: Radio On The Move Fall 2023

40% MORE CANADIANS 25-54 ARE STREAMING LIVE BROADCAST RADIO VS. STREAMING FREE SPOTIFY

A25-54
streamed past week

14%

of Canadians streamed Live Broadcast Radio in the past week

A25-54
streamed past week

10%

of Canadians streamed Free Spotify in the past week

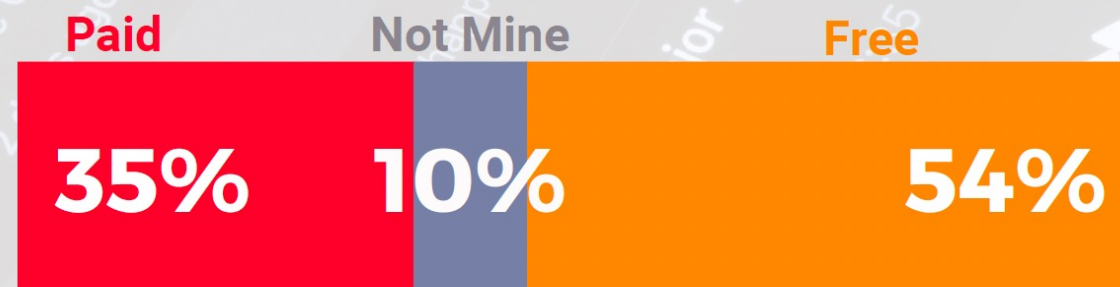


PURE PLAY PLATFORMS ARE REPLACING “OWNED” MUSIC LIBRARIES

% of Spotify Daily Users 2017 vs 2023

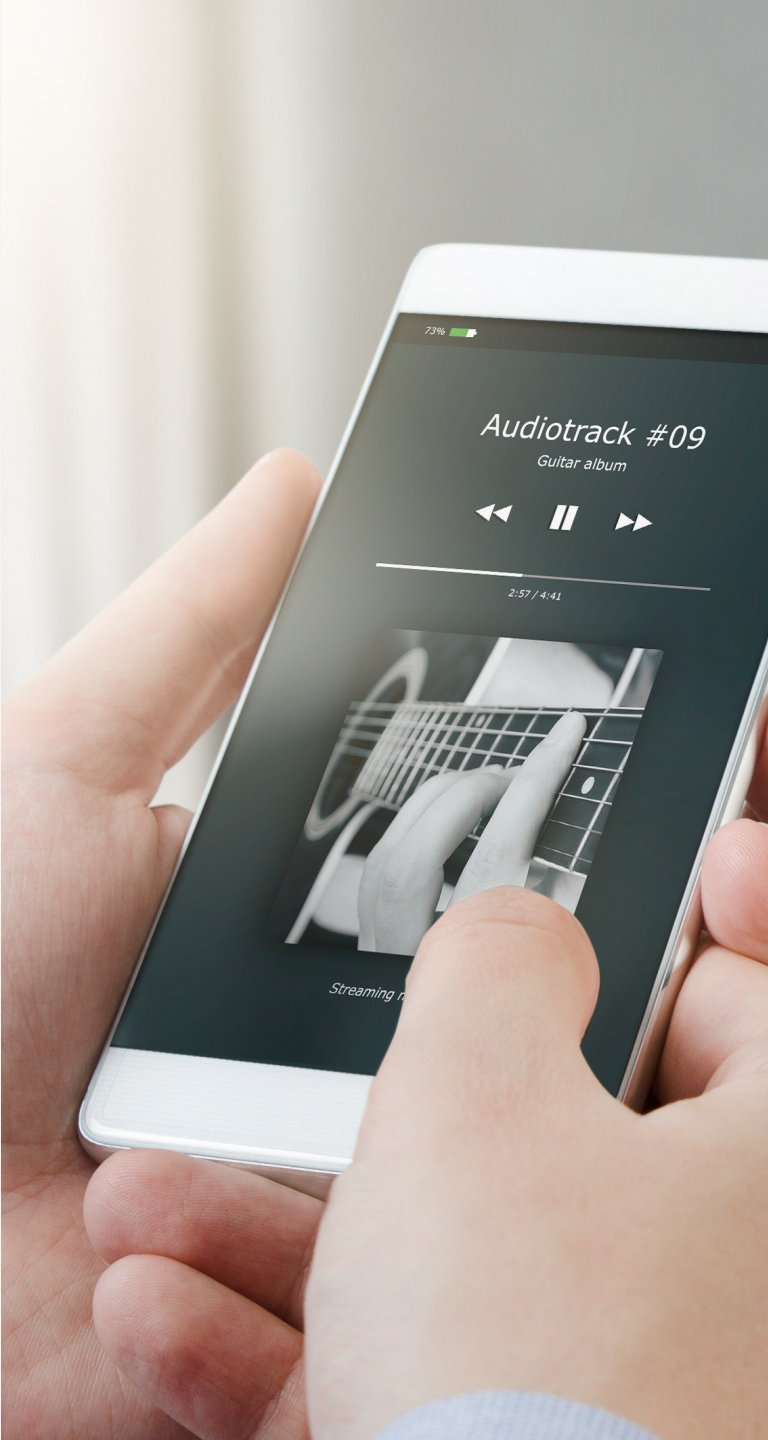
Since its launch, Spotify users continue to migrate to the Paid platform, as Canadians move to renting versus owning their personal music libraries.

Fall 2017

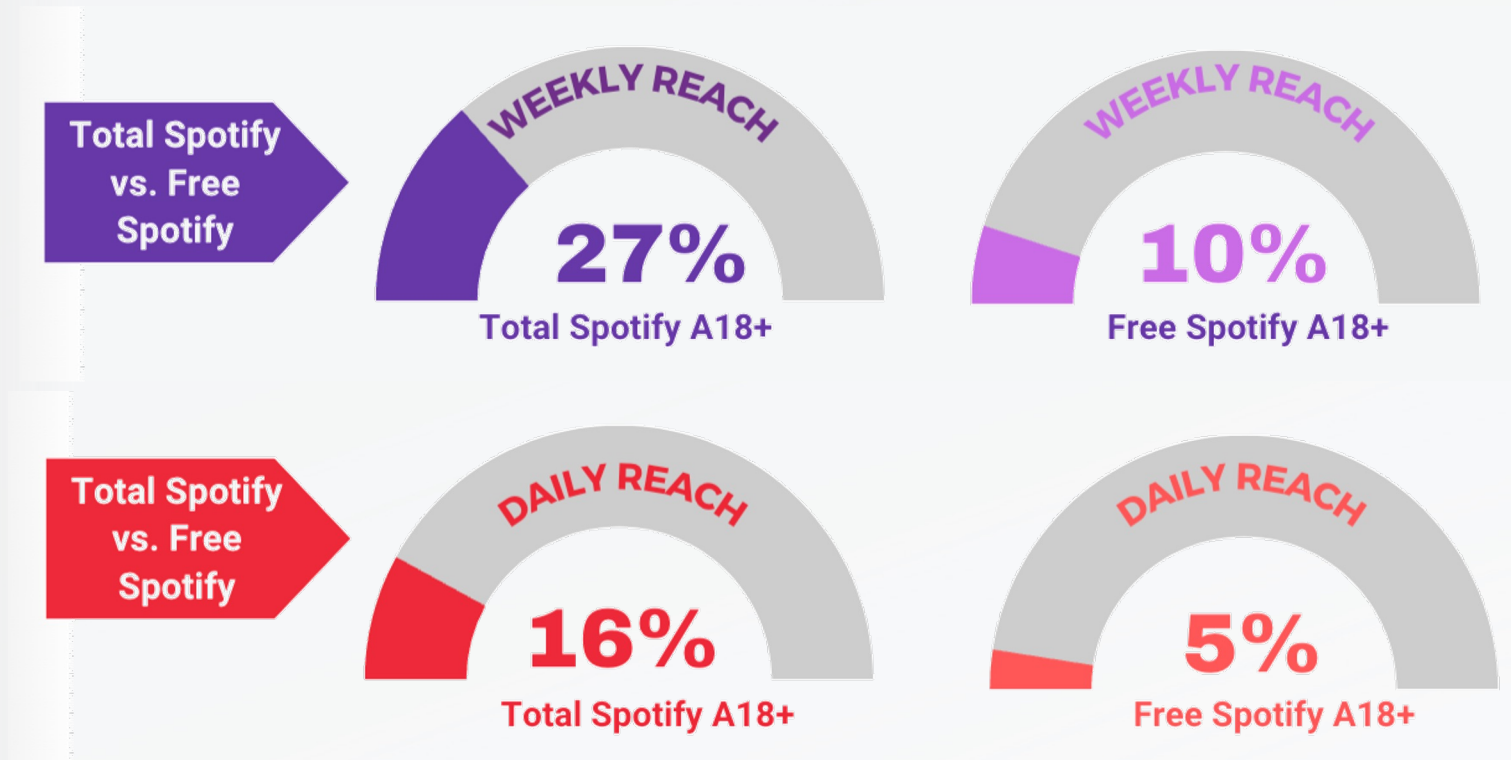


Fall 2023





REACH FOR AD-SUPPORTED SPOTIFY IS A FRACTION OF SPOTIFY'S TOTAL AUDIENCE



Source: Radio On The Move Fall 2023

ACROSS ALL DEMOS, LIVE RADIO PROVIDES SIGNIFICANTLY HIGHER EXCLUSIVE WEEKLY REACH THAN FREE SPOTIFY



AM/FM Radio **57%**
Free Spotify **4%**



AM/FM Radio **51%**
Free Spotify **6%**



AM/FM Radio **46%**
Free Spotify **7%**



AM/FM Radio **39%**
Free Spotify **10%**



RADIO HAS CONSIDERABLY HIGHER EXCLUSIVE WEEKLY REACH THAN PODCASTS



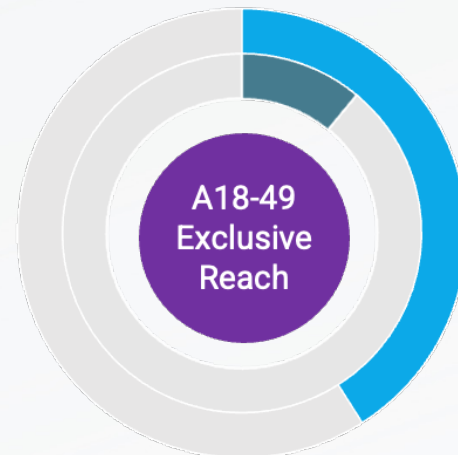
AM/FM Radio **53%**
Podcasts **7%**



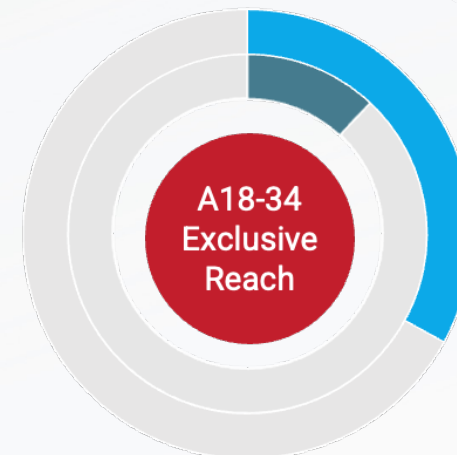
AM/FM Radio **45%**
Podcasts **9%**



AM/FM Radio **41%**
Podcasts **11%**

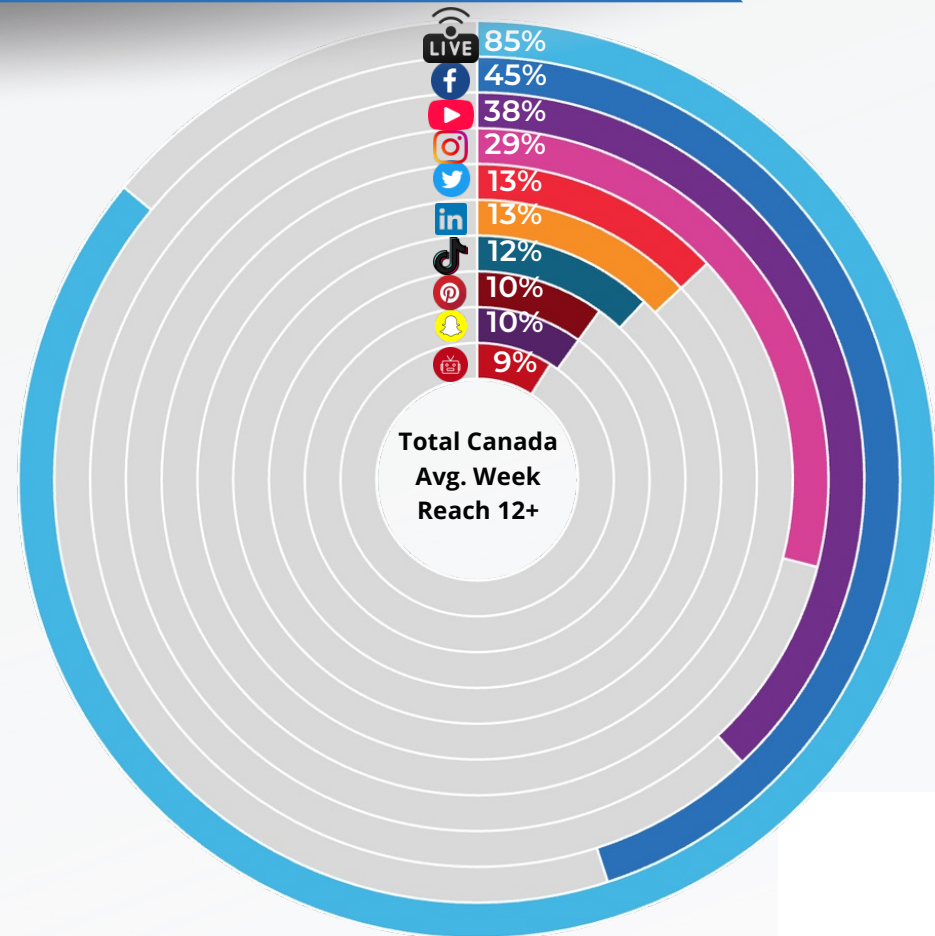


AM/FM Radio **33%**
Podcasts **12%**

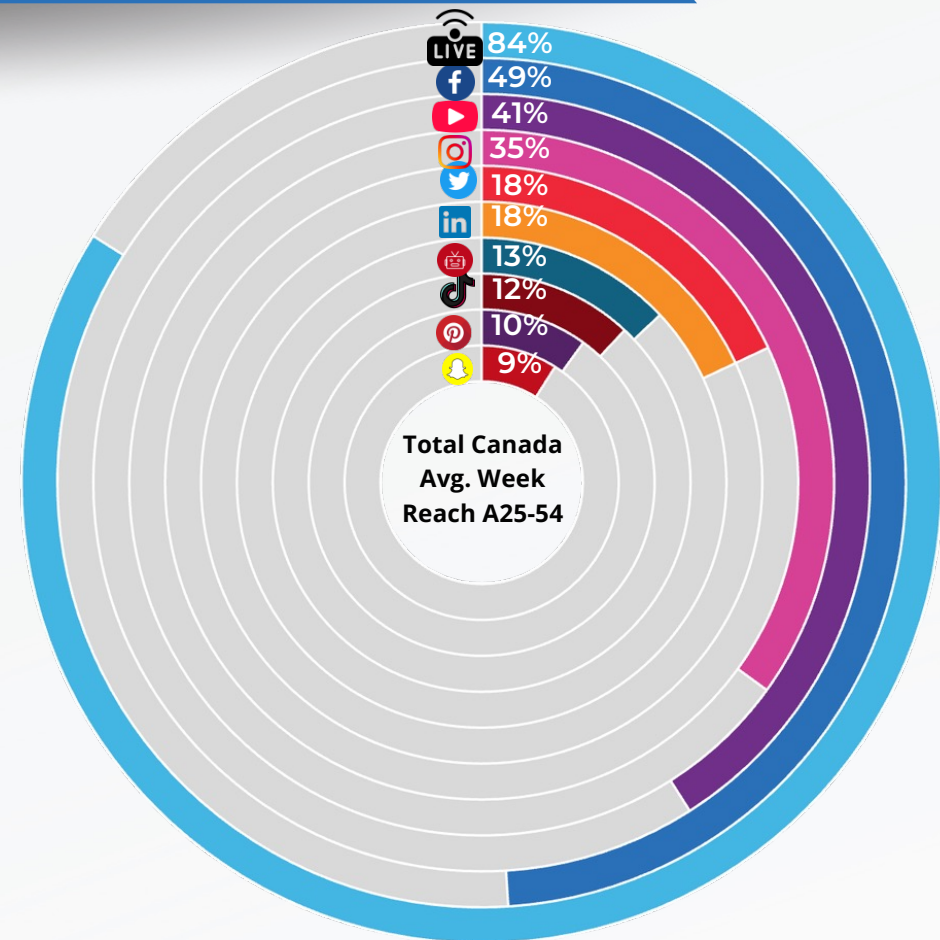
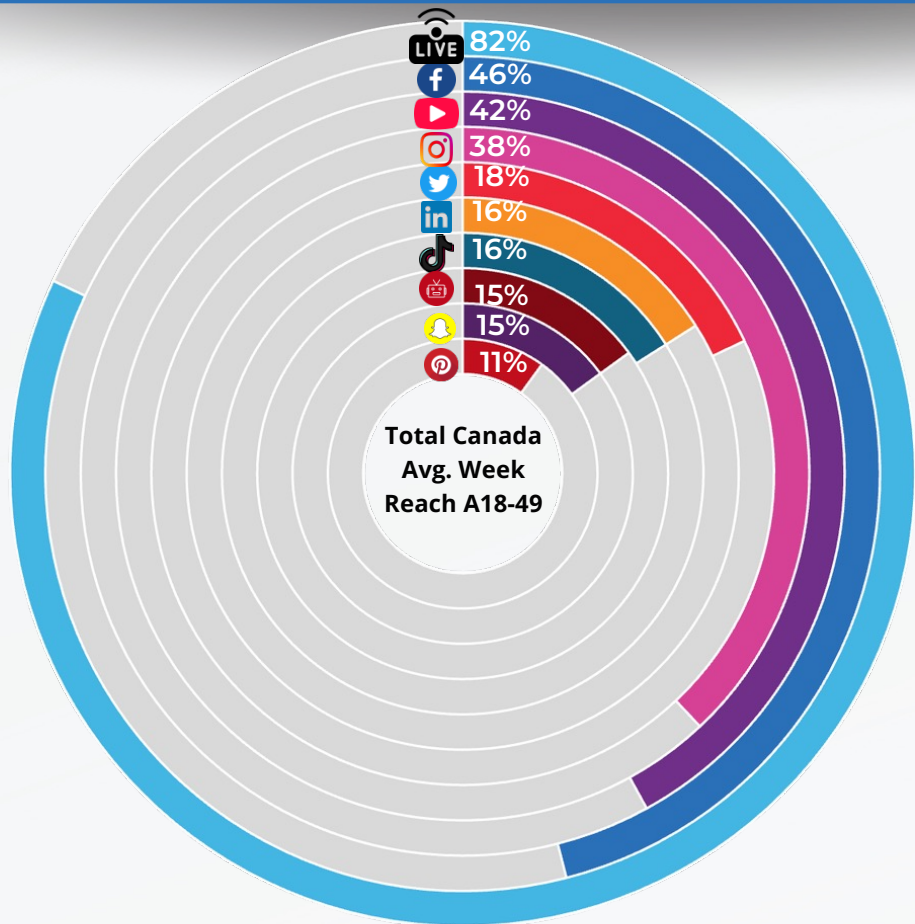


LIVE BROADCAST RADIO, THE ORIGINAL MOBILE, AND STILL BIGGEST, SOCIAL MEDIA PLATFORM

REACHES MORE CANADIANS
IN ONE WEEK THAN ANY
OTHER SOCIAL MEDIA
PLATFORM

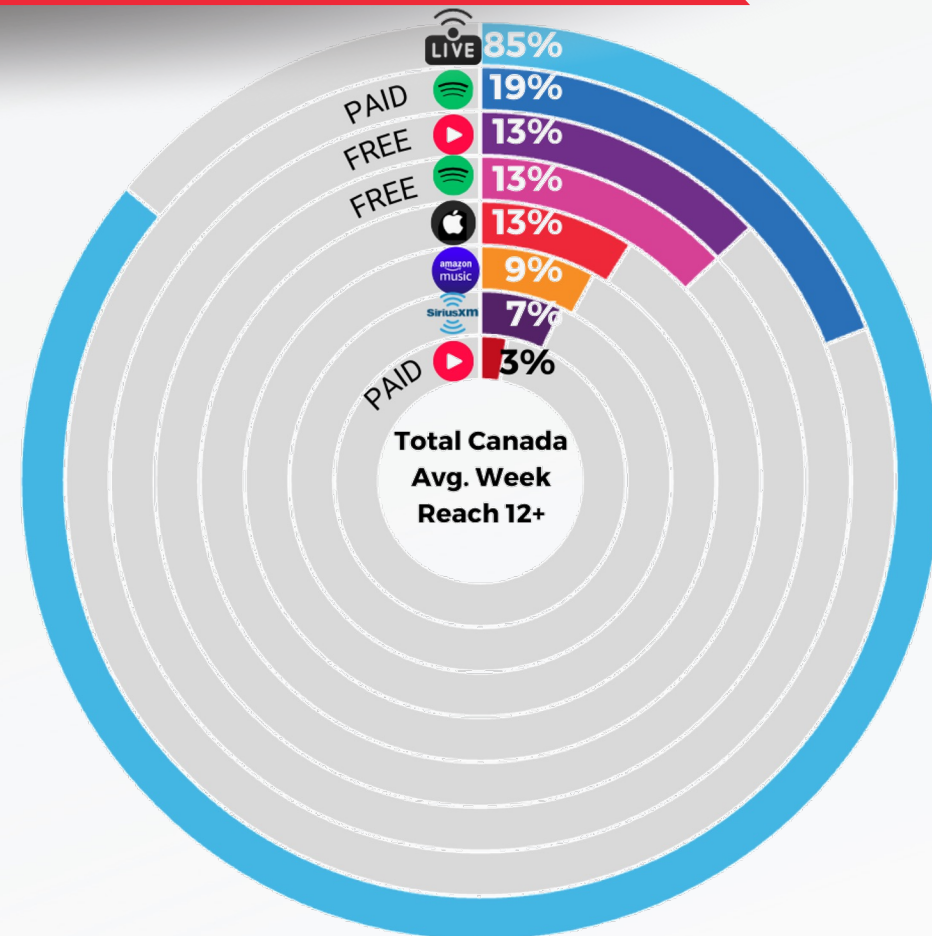


LIVE BROADCAST RADIO, THE ORIGINAL MOBILE, AND STILL BIGGEST, SOCIAL MEDIA PLATFORM

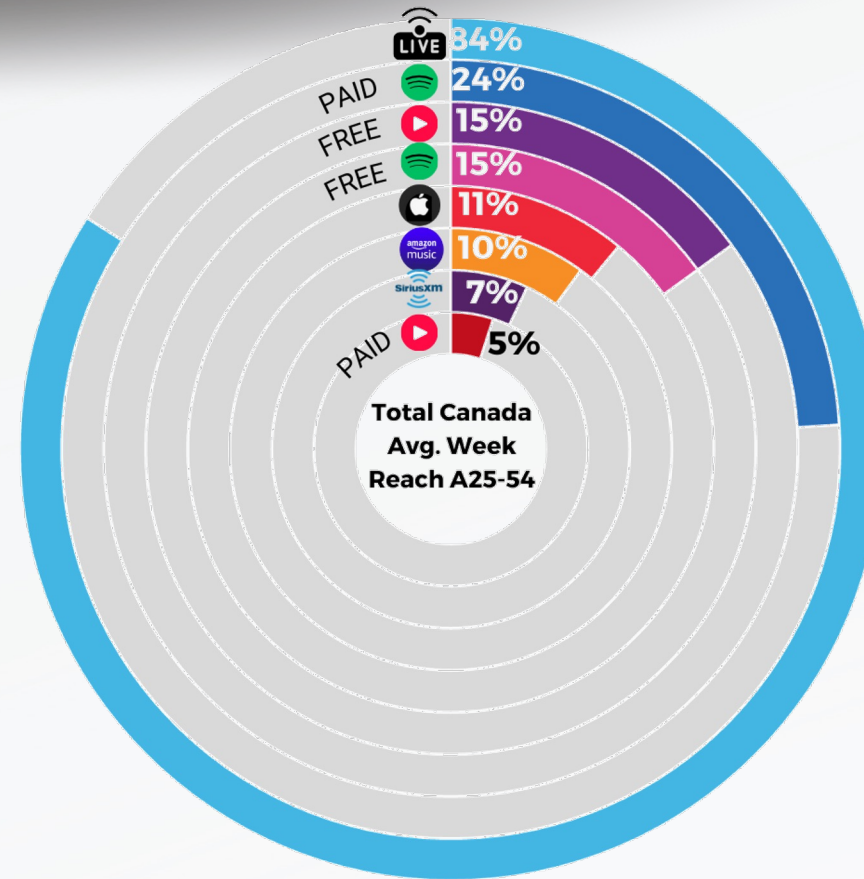
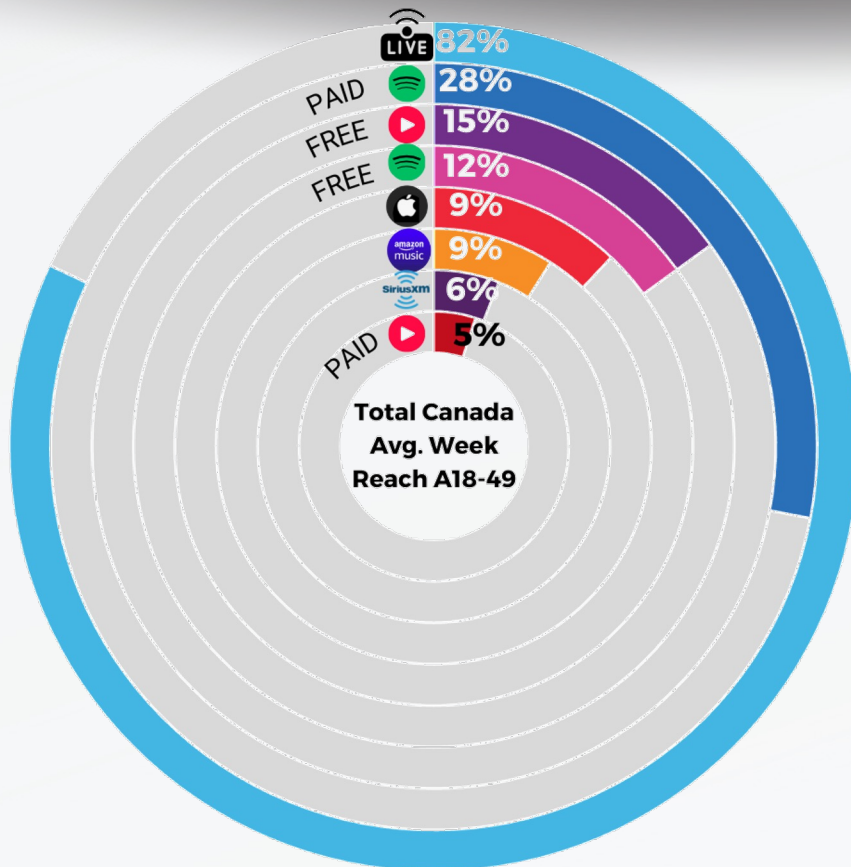


LIVE BROADCAST RADIO IS THE LARGEST AUDIO PLATFORM LISTENED TO BY CANADIANS

AND REACHES MORE CANADIANS IN ONE WEEK THAN ANY OTHER AUDIO PLATFORM



LIVE BROADCAST RADIO IS THE LARGEST AUDIO PLATFORM LISTENED TO BY CANADIANS



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