

One Year Later: Radio Tuning in Spring 2021

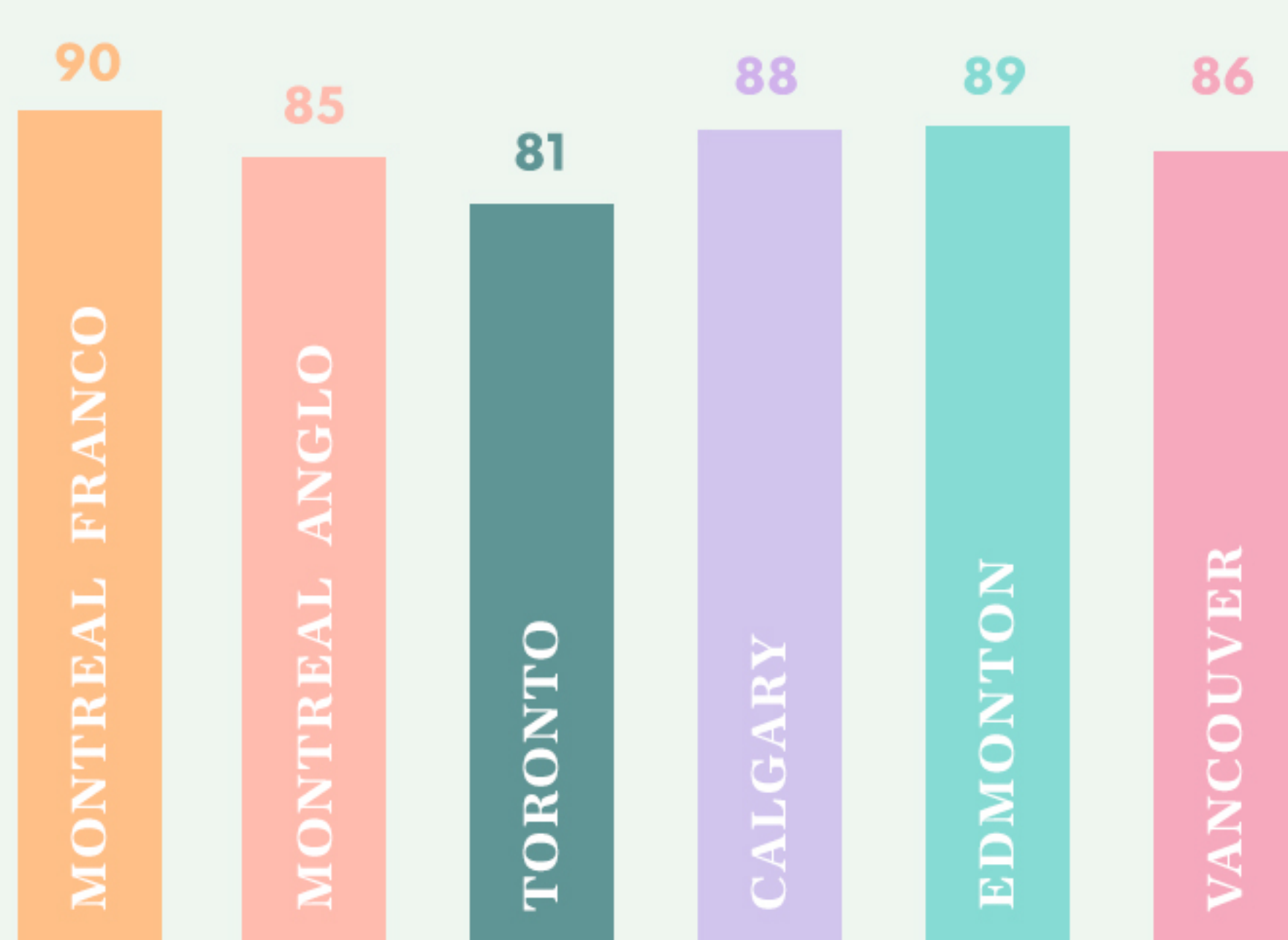


As we look back over the past year and evaluate the effects of the global pandemic, Canadians' tuning habits shifted in both where they listened and accessed content across multi-platforms. Although restrictions and lockdowns varied greatly across the country, AM/FM Radio continued to maintain its strong reach.

This season, **Total AM/FM Radio tuning maintained its audiences** compared to Spring 2020 for A12+ while increasing 2% for A25-54. Driving the AMA increase for A25-54 were the markets of Vancouver, Edmonton, Calgary and Montreal Franco, which indexed between 104-111 compared to Spring 2020.

AM/FM Radio reaches **84%** of A12+ each week across PPM markets

Reach of Radio for A25-54 was highest in Calgary, Edmonton and Montreal Franco ranging from **88-90%** during Spring 2021.



Source: Numeris Radio Meter, Total Meter CTRL, Spring 2019/2020/2021, AW 2a-2a, A25-54, AvgWklyRch(%)

Weekly reach in Spring 2021 for A25-54 is **INDEXING AT 91** compared to the pre-COVID period of Spring 2019.



Radio's Reach for A25-54



** includes COVID periods

REBOUND of AM/FM Radio this Spring

While restrictions remained in place across the PPM markets during April and May 2021 in the third wave of the pandemic, tuning to AM/FM Radio rebounded, increasing **7%** for A12+ when compared to April 2020 and up **5%** from May 2020 during the first wave.

With government mandated lockdowns still in effect, OOH listening is not yet back to pre-pandemic levels in PPM markets, although tuning distribution for out-of-home saw a lift of 4 percentage points this season from last Spring, increasing from **38% to 42%** for audiences A12+ in Spring 2021.

Source: Numeris Radio Meter, Total Meter CTRL, Spring 2020/2021, AW 2a-2a, A12+, AMA(000)



7.7 million

Canadians reached during **BREAKFAST** period (6a-10a) each week in PPM markets during Spring 2021, an increase of 8% from Spring 2020 for A12+.



Over 9 million

Canadians reached during **DRIVE** period (3p-7p) each week in PPM markets during Spring 2021, an increase of 6% from Spring 2020 for A12+.

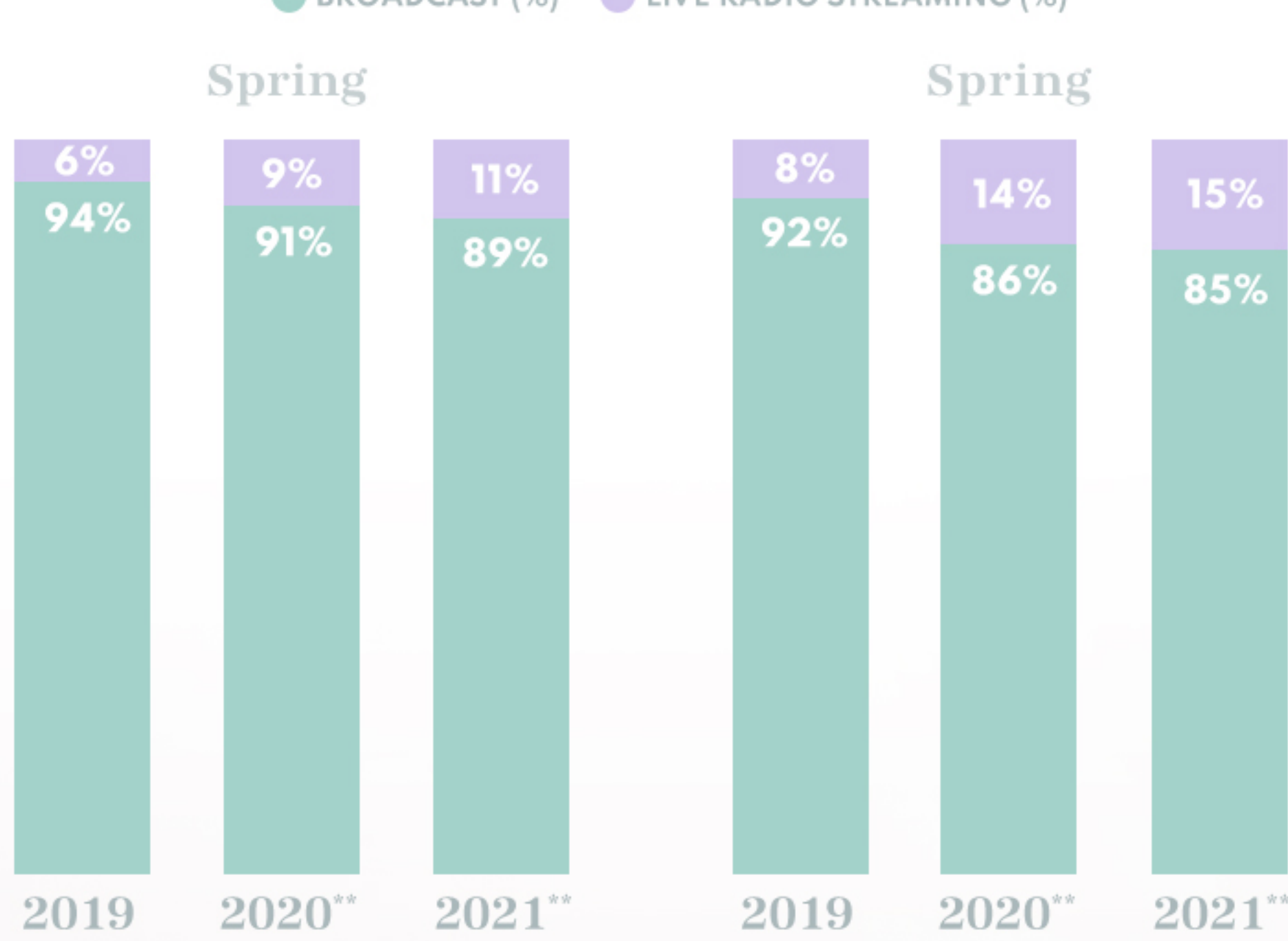
Source: Numeris Radio Meter, Total Meter CTRL, Spring 2020/2021, AW 2a-2a, A12+, AvgWklyRch(000)

Live Radio STREAMING* increases over COVID

Canadians media habits continue to evolve in the audio landscape and the consumption of Live Radio Streaming* has increased over the pandemic and now represents a greater share of total tuning to AM/FM Radio. Live Radio Streaming* accounts for an 11% and 15% share of Total AM/FM Radio for A12+ and A25-54 in Spring 2021, a lift from Spring 2019 and 2020.

Share of Tuning to AM/FM Radio

● BROADCAST (%) ● LIVE RADIO STREAMING (%)



Source: Numeris Radio Meter, Total Meter CTRL, Spring 2019/2020/2021, AW 2a-2a, A12+ and A25-54, AMA (000), by platform

** includes COVID periods

Toronto and Vancouver continue to be the top 2 markets for Live Radio Streaming* at **19% and 20% share of Total AM/FM Radio** for A25-54 in Spring 2021.

Commuting times remain below pre-pandemic levels while working from home continues due to restrictions, with **in-home tuning to live radio streams** for A25-54 increasing in Spring 2021.



*Disclosure: AM/FM Live Streaming includes listening on personal computer, smartphone, tablet, smart speaker etc. The Numeris radio meter service measures the internet stream of member stations separate from their over the air signal. The live internet stream is identical in programming content.