

Radio Tuning in Winter 2021

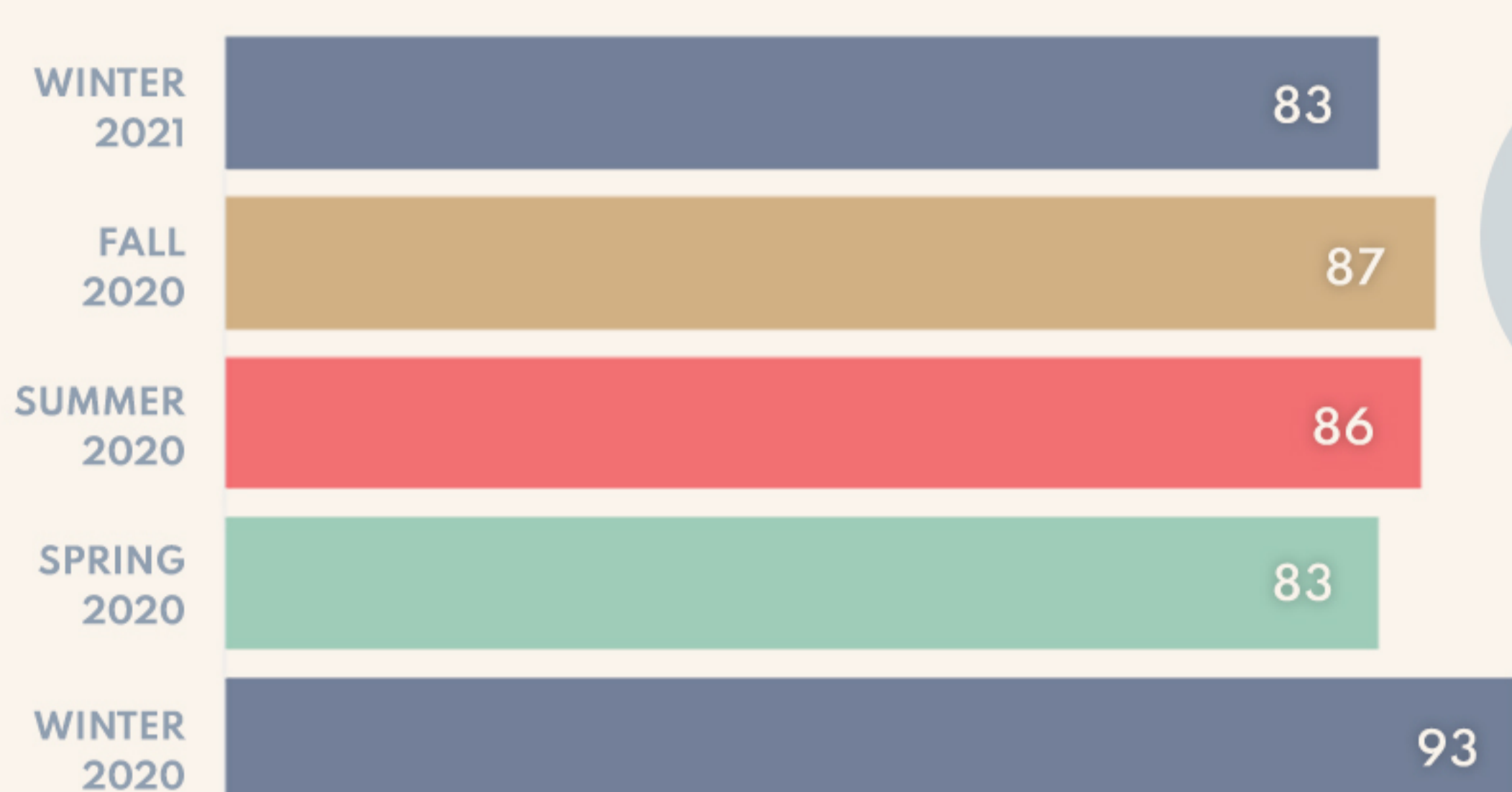


Canadian audiences continued to tune to AM/FM Radio for local news, music and entertainment, as the Winter 2021 season coincided with the height of the second wave of the pandemic. Regional governments maintained restrictions and lockdowns that extended throughout the holiday season and into the new year, with 'stay at home' orders mandated in Ontario and Quebec.

Total AM/FM Radio listening maintained 95% of its audience this season compared to Fall 2020 for audiences 12+. While Total Radio AMA in Winter 2021 for AM/FM Radio amongst A25-54 is down 8% from Fall 2020 levels across the PPM Markets, this trend is consistent with the previous year that saw a 7% decline in Winter 2020 vs Fall 2019.



Radio reaches 83% of A25-54 in Winter 2021



Weekly Reach of Radio was consistent in both lockdown periods of Winter 2021 and Spring 2020.

Source: Numeris Radio PPM, Total Meter CTRL, 2019-20/2020-21, AW 2a-2a, A25-54, AvgWklyRch(%)

WEEKLY REACH IN WINTER 2021 FOR A25-54 IS INDEXING AT 95 COMPARED TO FALL 2020.



REACH OF RADIO PEAKED AT 87% IN THE MARKETS OF MONTREAL FRANCO AND EDMONTON FOR A25-54 DURING WINTER 2021.

Lift in Live Radio Streaming*

As Canadians media habits continue to evolve in the audio landscape, the consumption of live radio streaming* for A12+ in Winter 2021 increased by 3 percentage points for AM/FM Radio compared to last Winter, ahead of the first lockdown.



Live Radio Streaming*

maintained a 10% share of Total AM/FM Radio in Winter 2021 for A12+. For key demos this increases to:

15% FOR A18-34 **14%** FOR A25-54

Top 3 Markets

for live Radio streaming* amongst A25-54 are: (percentage of live radio streaming* of total AM/FM Radio.)

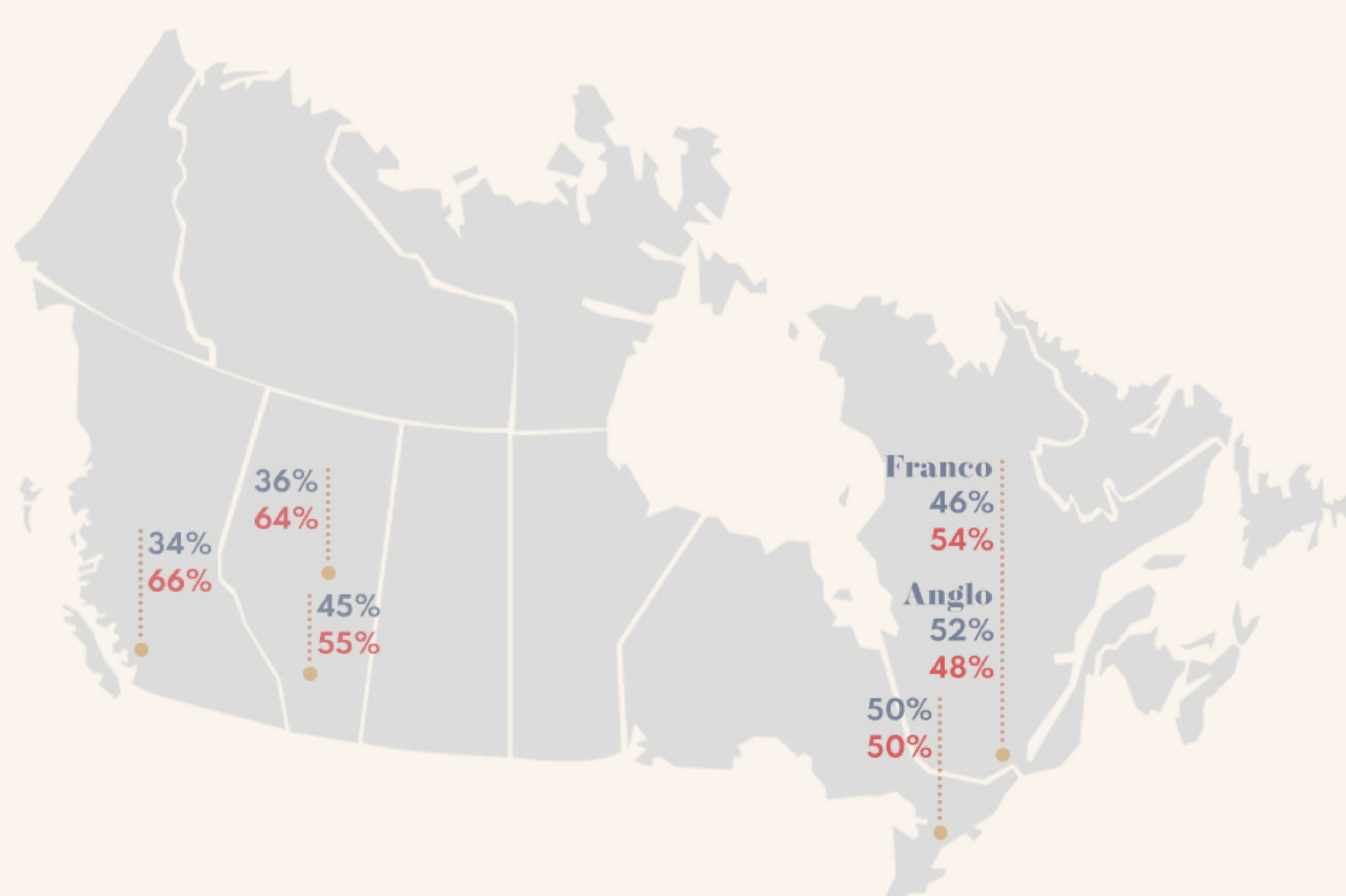
20% VANCOUVER **19%** TORONTO **13%** CALGARY

Source: Numeris Radio PPM, Total Meter CTRL, 2019-20/2020-21, AW 2a-2a, AMA (000), by platform
*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.

LISTENING BY LOCATION across Canada

While tuning to AM/FM Radio shifted into the home last year at the start of the pandemic, Winter 2021 saw over half of tuning (55%) for A25-54 occurring outside of the home, reflective of routine changes. In comparison to last year, the tuning distribution for OOH shows a 14 percentage point decrease from Winter 2020.

As restrictions were either extended or lifted at varying degrees across the PPM markets, listening by location also varied by region.



Source: Numeris Radio PPM, Total Meter CTRL, Winter 2021, AW 2a-2a, A25-54, AMA (000), by location



Half of listening to AM/FM Radio is done IN-HOME in Toronto and Montreal Anglo



Over 60% of listening to AM/FM Radio is done OUTSIDE THE HOME in Edmonton and Vancouver.