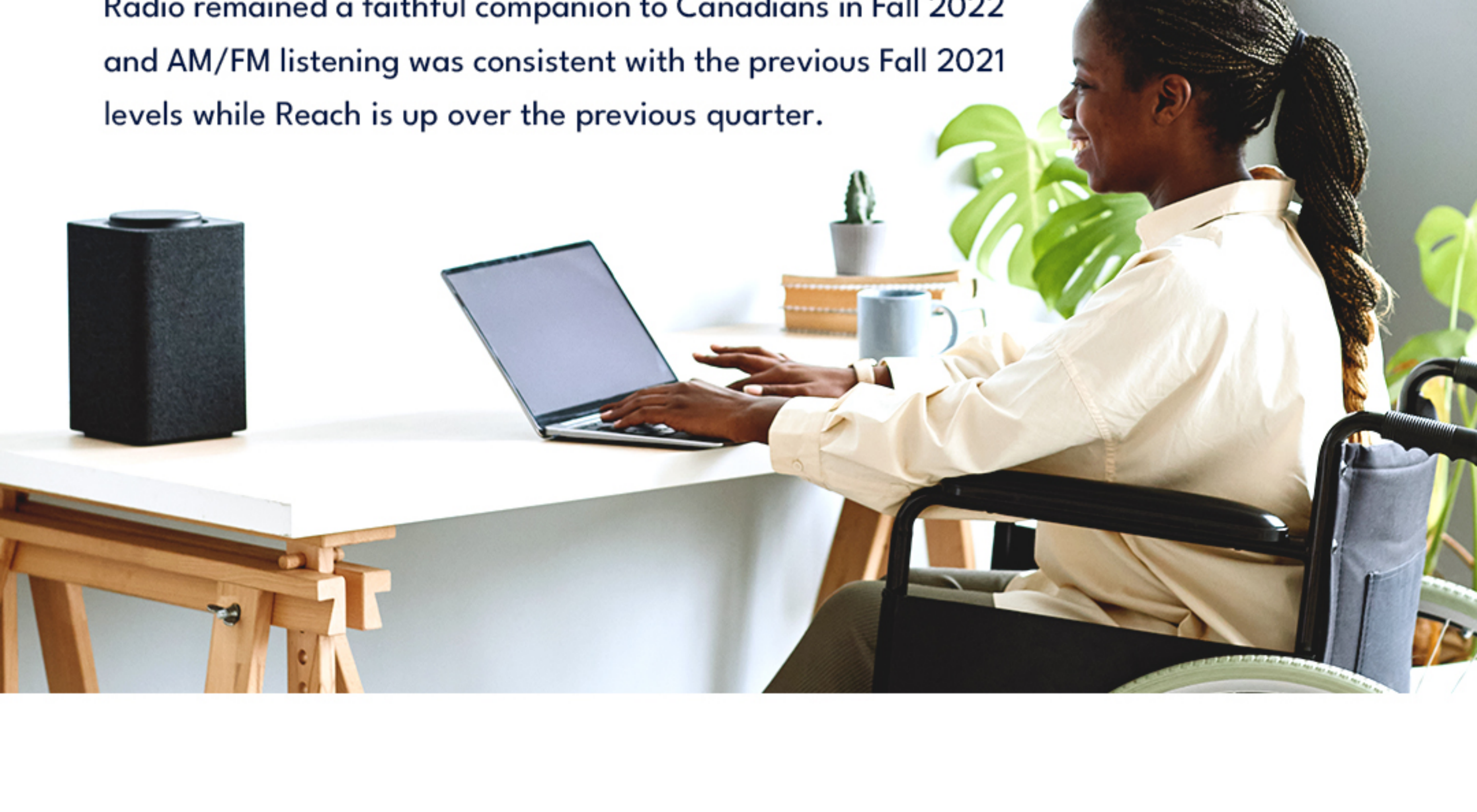


Radio Listening

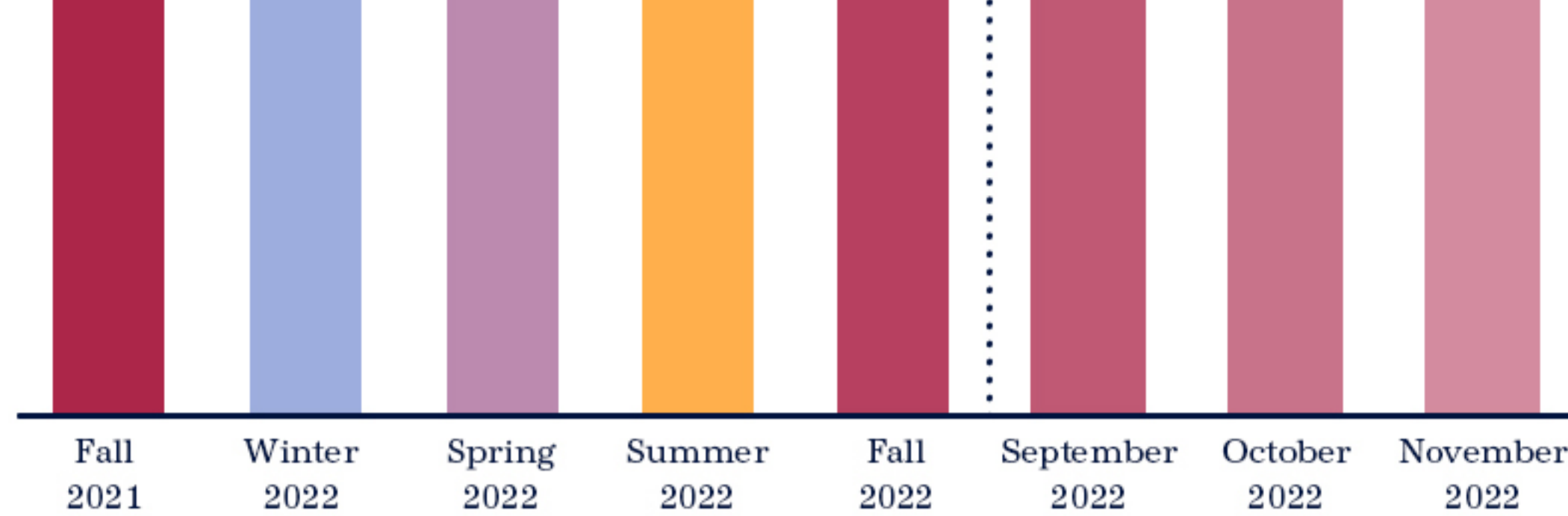
Fall 2022

This past Fall, we saw many people venture back to the physical office more often. Although work from home environments still remain, the option to periodically return to the office was a popular choice, driving an increase in out-of-home listening. Radio remained a faithful companion to Canadians in Fall 2022 and AM/FM listening was consistent with the previous Fall 2021 levels while Reach is up over the previous quarter.

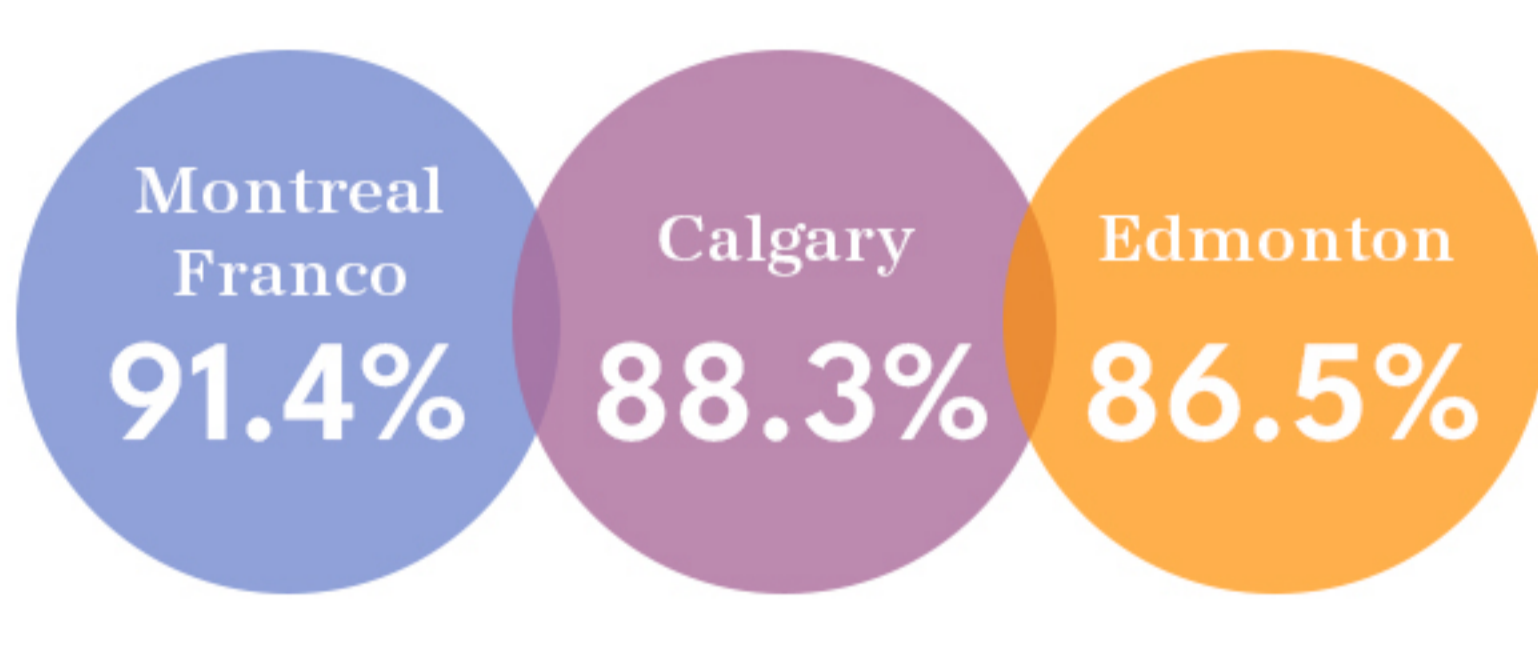


AM/FM Radio Reaches 86% of Canadians A12+ across PPM markets.

Reach of Radio is higher than the past 3 seasons and remains flat with that of Fall 2021 at 86%.



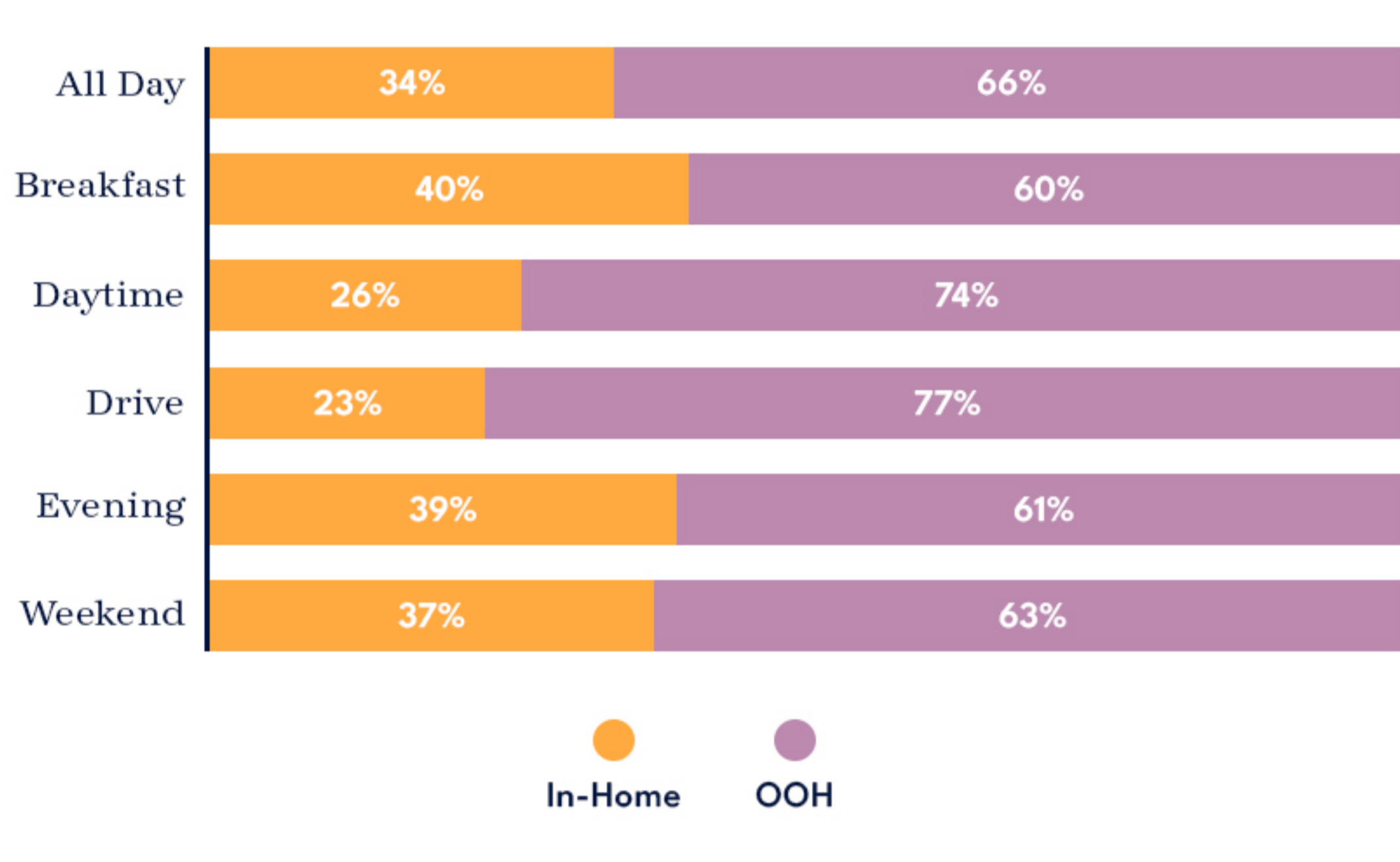
A12+ Reach is highest in



Majority of Radio listening throughout the day occurs outside of the home.

The share of out-of-home tuning for A25-54 is at 66% this Fall, up 2 percentage points from last year. Drive and Daytime dayparts have the highest percentage of out-of-home tuning and are also seeing the biggest increase in terms of proportion compared to last Fall, up 4 and 5 percentage points, respectively.

Proportion of Radio Tuning by Location Fall 2022 - A25-54



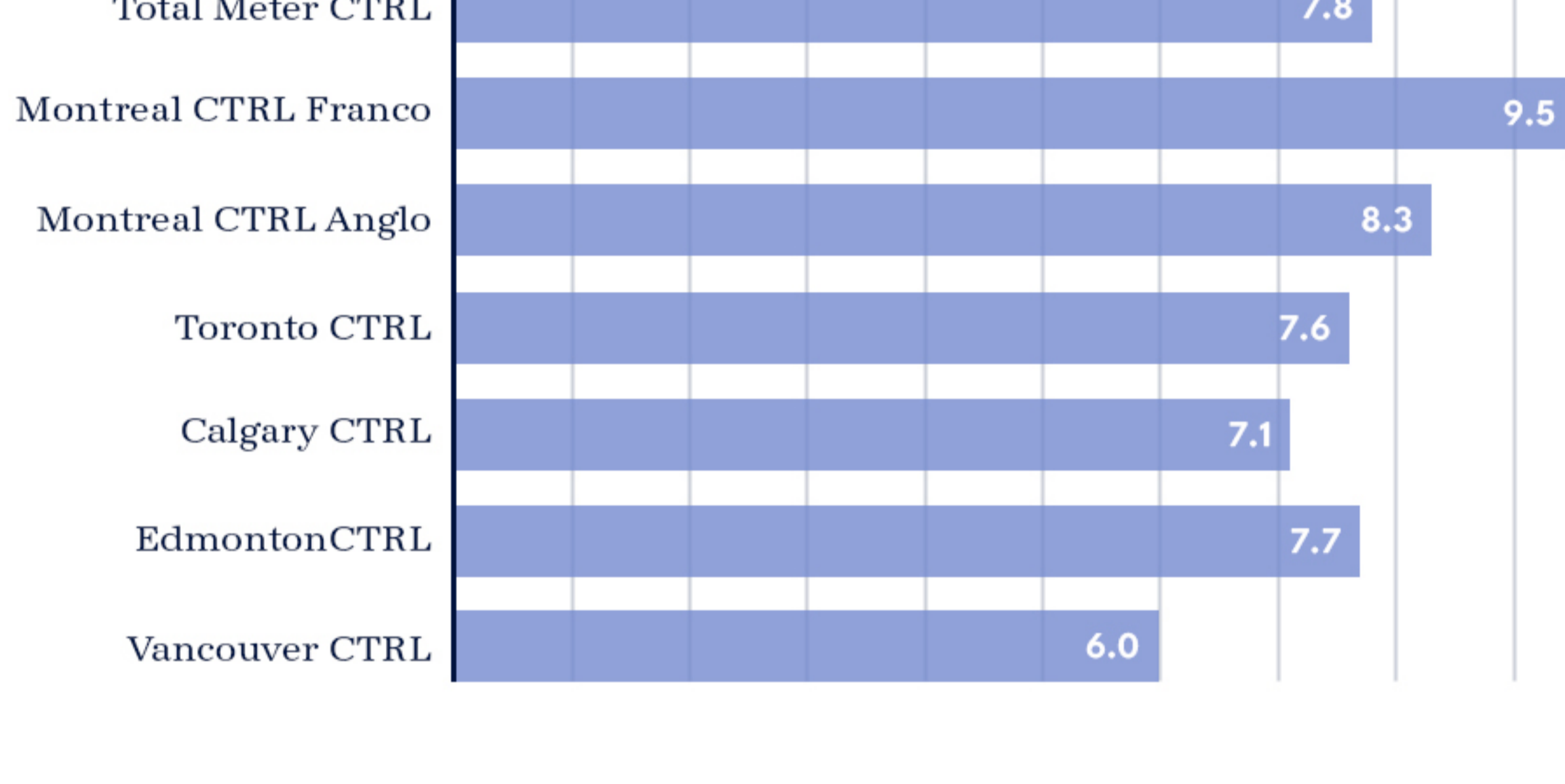
Vancouver has the highest out-of-home proportion for Drive, Evening and Weekend dayparts at 83%, 70% and 75%, respectively. Drive daypart has the highest weekly reach across all meter markets; this Fall, 65% of A25-54s were reached for Total Meter.



Time Spent Listening remains stable for Total Meter Markets.

A12+ spent almost 8 hours listening across the meter markets with Montreal Franco spending the most time at 9.5 hours.

Average Weekly Time Spent Listening Fall 2022 - A12+



Live Streaming remains stable for A12+

Live Radio Streaming* maintained a 9% share of Total AM/FM Radio in Fall 2022 for A12+, 12% for A18-34, and 11% for A25-54.



Streaming* Proportion for A12+

Fall 2020 → 9%

Fall 2021 → 10%

Fall 2022 → 9%

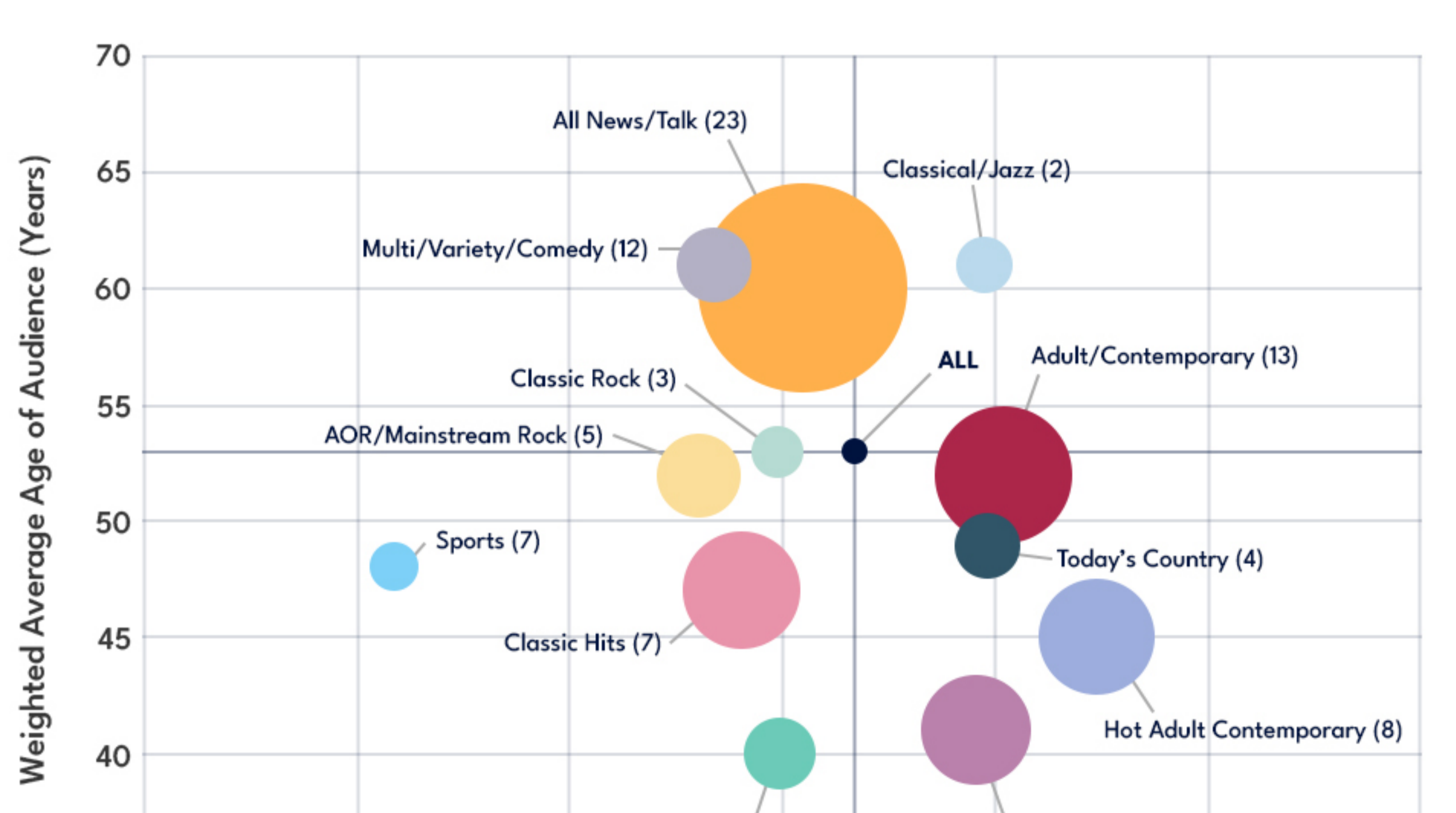
Montreal Franco maintained a 7% share of live streaming* for total AM/FM radio. When comparing to last Fall, Montreal Anglo's live streaming* share of AM/FM radio is up 3 percentage points. Vancouver is also up, with a 2 percentage point increase to Fall 2021 and now sitting at 12%; the highest proportion of live streaming* out of any meter market.

*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.

Source: Numeris Radio PPM, Total Meter CTRL, Fall 2020/Fall 2021/Fall 2022 (Weeks 1-13), AW (Mo-Su 2a-2a), A12+/A18-34/A25-54, AMA(000), AvWkCume(%), AvHoursWk(Lis)

Listening by Format

To gain some further insight into who is listening and to what, we have aggregated Radio stations into format groups and visually represented the proportion of listening by sex, the average weighted age of listeners and the relative size in hours tuned. The larger the bubble, the larger the audience. In Fall 2022, the median age of listening was 53 years, and women represented 48.4% of all listening in the Central Markets. The Sports format is 26.8% female and averages 48 years; Hot Adult Contemporary is 59.7% female and 45 years of age on average.



Source: Numeris Radio PPM, Total Meter CTRL, 8/29/2022 - 11/27/2022, AW (Mo-Su 2a-2a), A12+, TotHrsWk(000), WAvAge, Note: The 'All' sphere is disproportionately small.



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I Have Questions!