



RADIO IS CONNECTING WITH
CANADIANS DURING COVID-19

 Audience Insights April 30, 2020 





With fewer Canadians in cars, the usual high reach levels generated by radio have been impacted.

Even though many are working from home, Canadians, including essential workers, are still out and about.

Radio has retained 85% of its Avg. Weekly Reach March 16 – April 26, 2020 vs. February 3 – March 15, 2020. (Source: Numeris PPM, Non-Currency* Total Canada 12+, Mo-Su 2a-2a, AVWK CUME (000), Weeks 24-35 19/20)

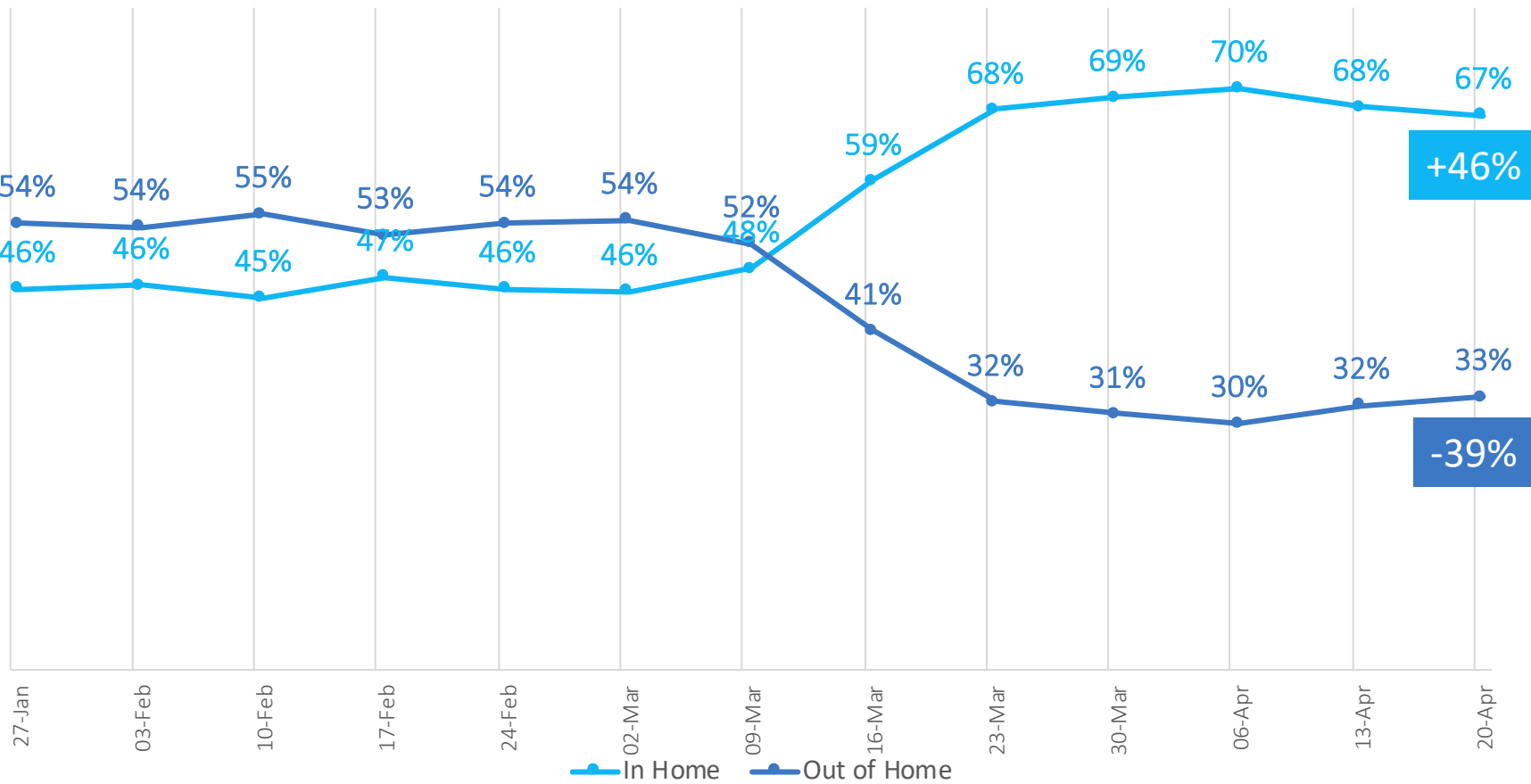
As Canadians adjust to the current world of sheltering in place, Radio continues to provide an important connection to community. The following provides highlights from Maru Canada and Angus Reid Forum studies that look specifically at how Canadians are connecting to AM/FM Radio in March and April 2020.

**Note: in order to provide broader perspective of radio listening behaviour across Canada, Radio Connects audience data reflects Numeris PPM Non-Currency audiences which include listening from smaller markets across the country with different demographic compositions and commuting behaviours than the traditional radio CMAs)*

IN-HOME currently 2/3's of AM/FM tuning.

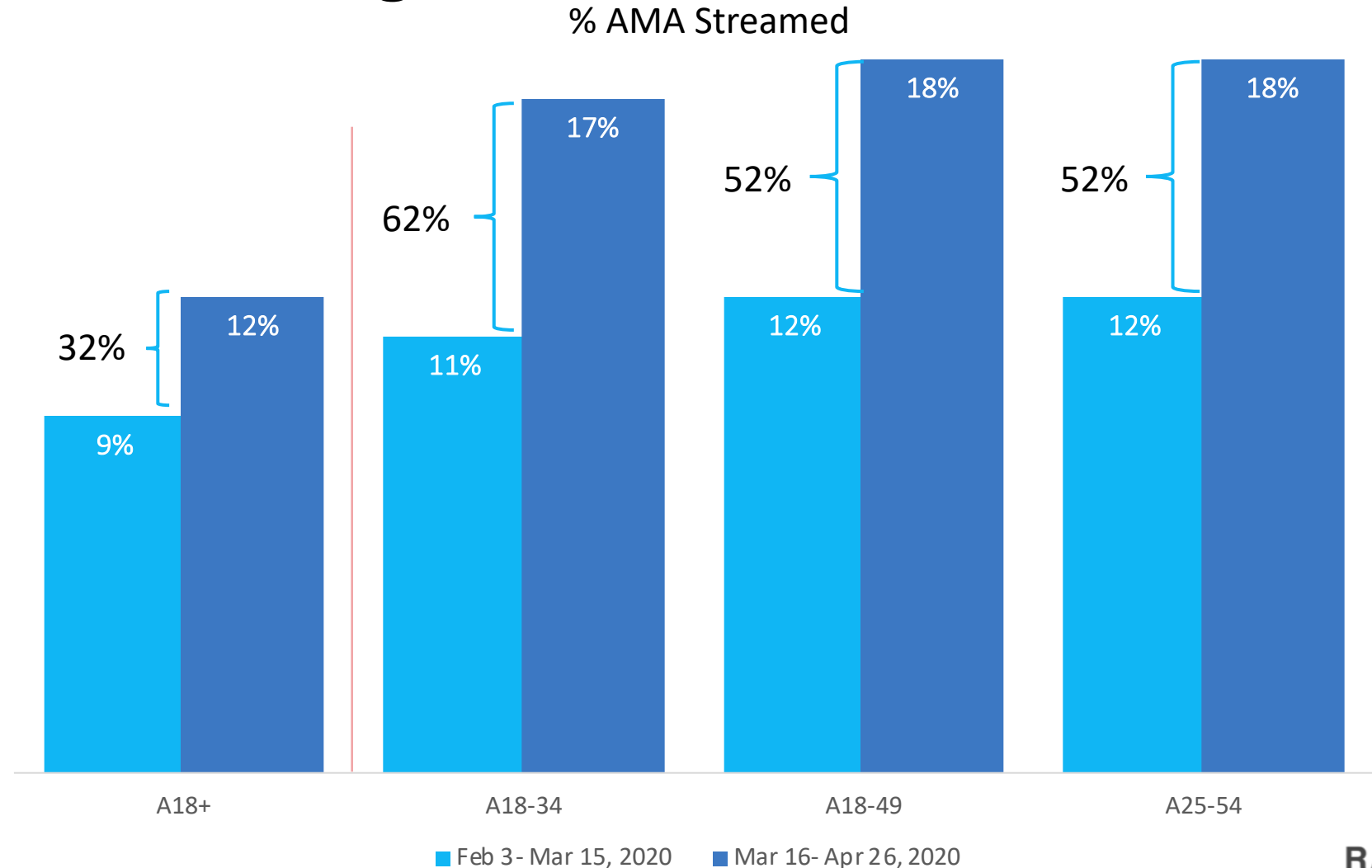
During the w/o April 20th, in-home tuning increased 46% vs. w/o Jan 27th, and OOH tuning decreased 39%.

A18+ % Weekly AMA In Home and Out of Home Tuning to AM/FM Radio – Week of April 20th, 2020 vs. Week of Jan 27th, 2020



Younger Demos are currently more likely to tune into AM/FM Radio via streaming.

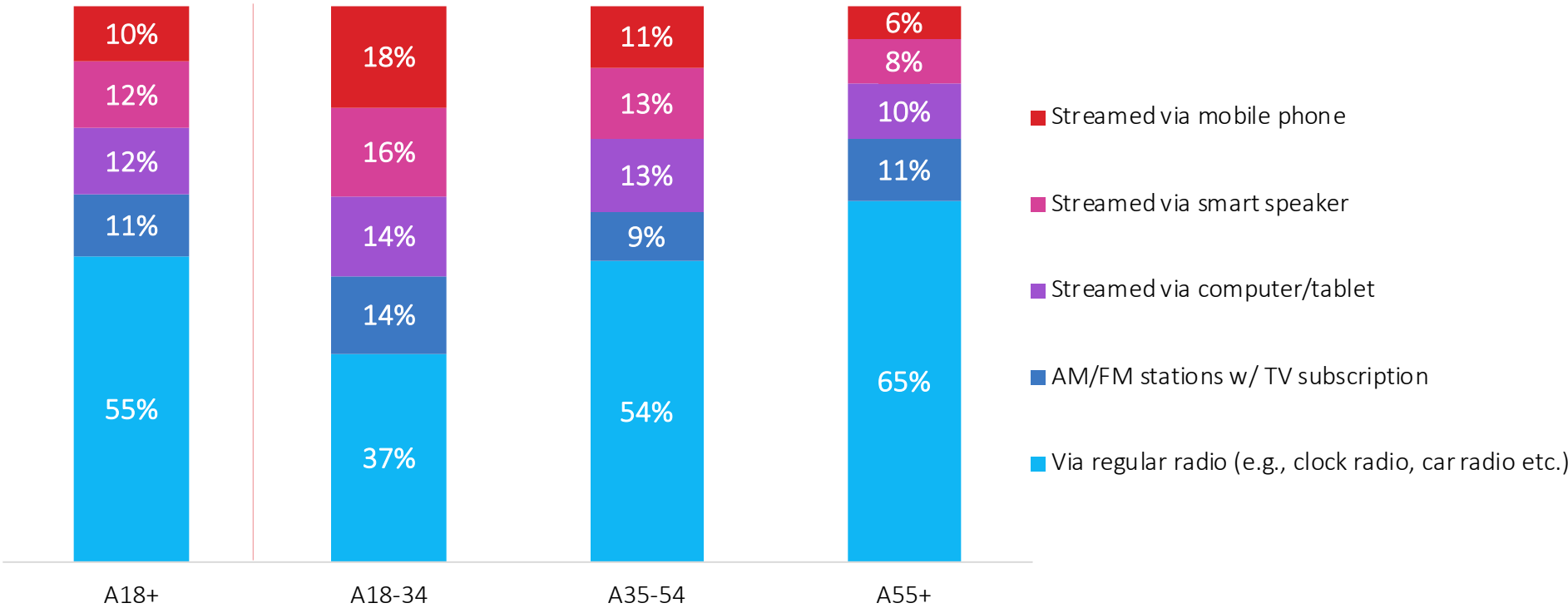
All key demos are reporting an increase in minutes streamed since Pre-Covid-19.



Multi-device radio listening is part of “the new normal”?

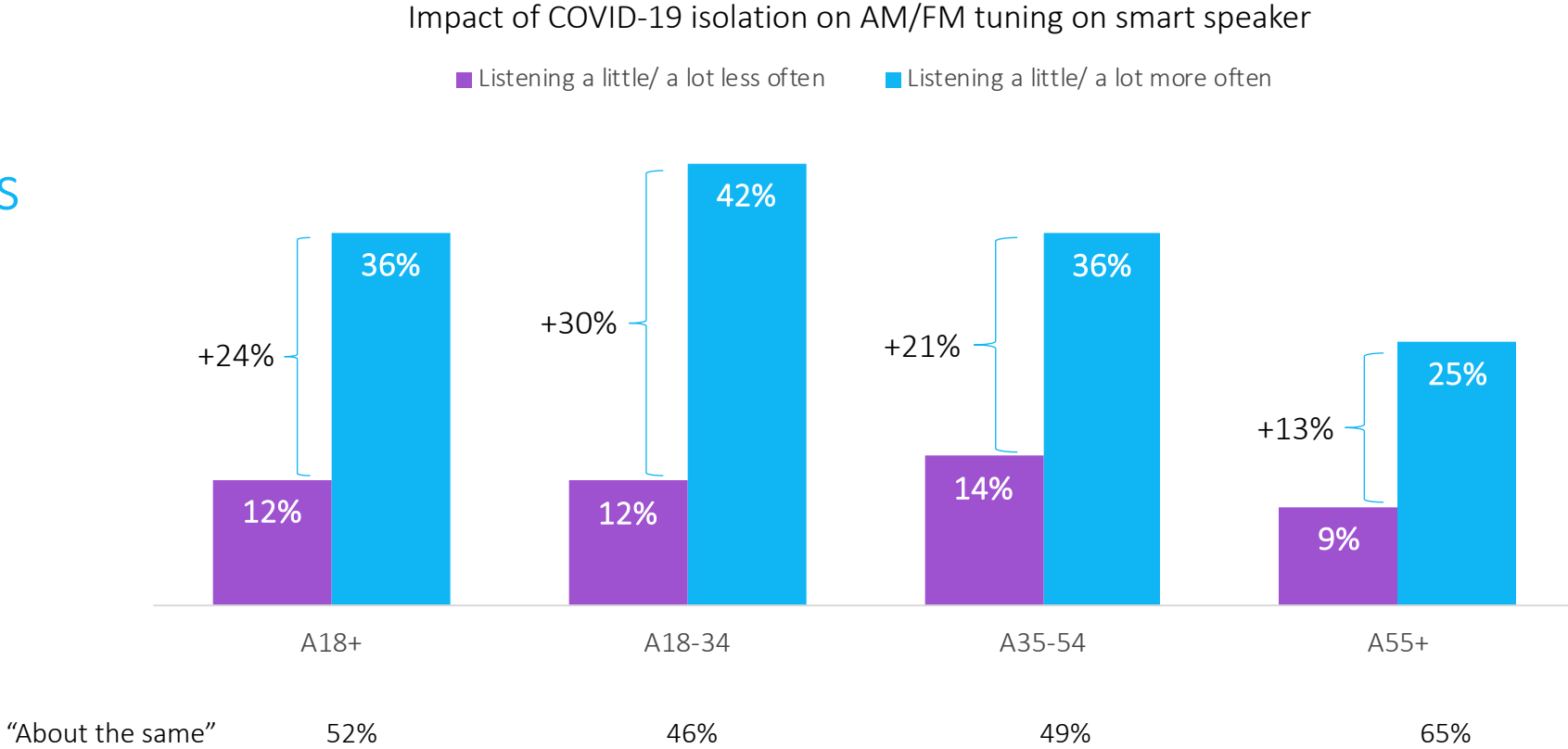
During COVID-19 Canadians of all ages are listening to AM/FM Radio on different platforms, with younger Canadians doing more digital streaming.

Proportion of Previous Day Listening to AM/FM Radio on Each Device



During COVID-19 tuning into AM/FM via a smart speaker has increased.

More Canadians, especially A18-34's who listen to AM/FM on smart speakers, are now listening more often.

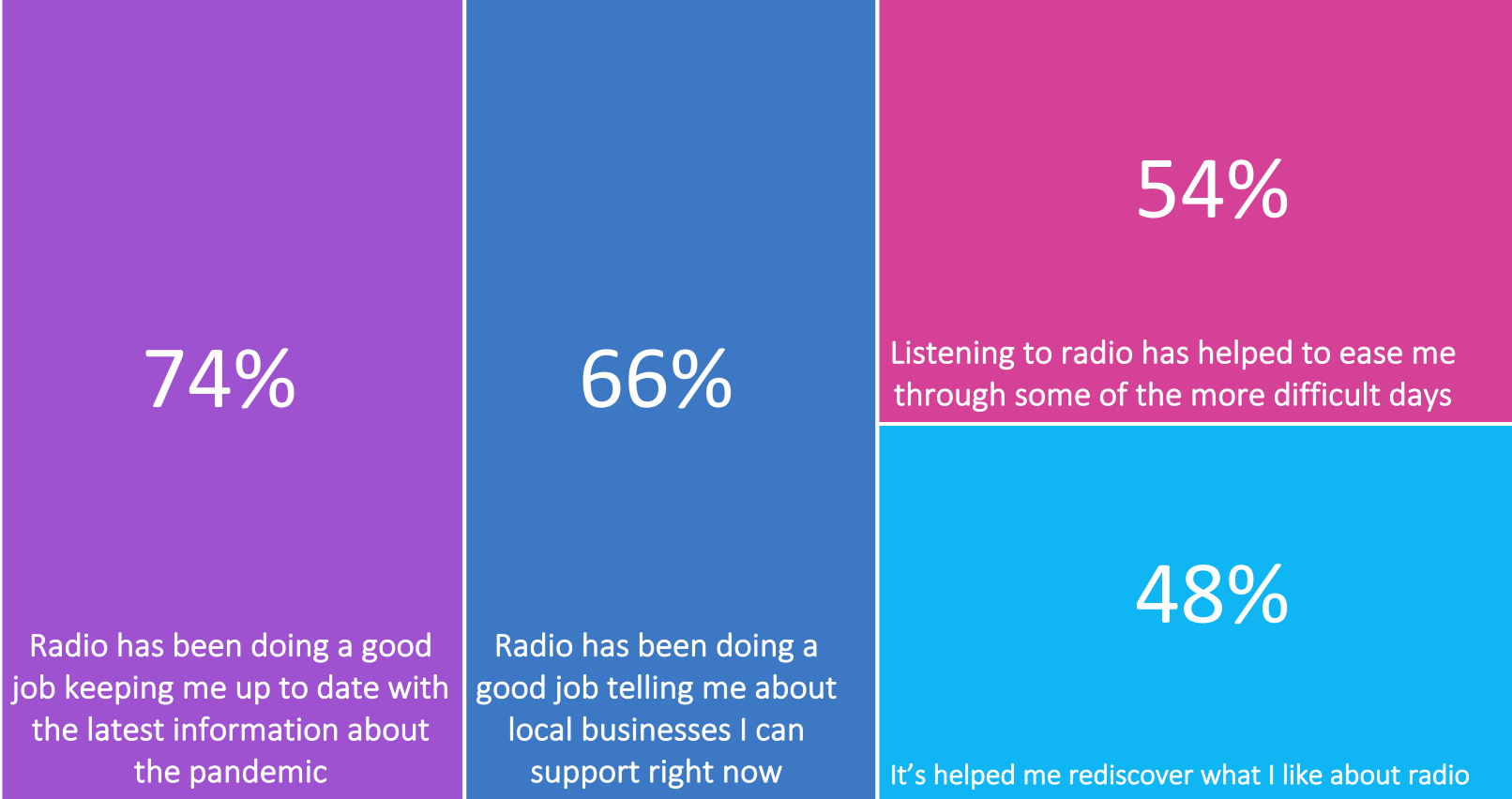


SOURCE: Maru Voice Canada April 8 & 13, 2020
 MP3. How, if at all, has your listening to FM or AM radio on smart speakers changed since the government asked people to stay-at-home during the COVID-19 pandemic? Base: Smart speaker owners who listen to AM/FM on their smart speakers April 2020 (n=469), A18-34 (n=138), 35-54 (n=198), 55+ (n=133)

Radio is keeping Canadians connected and supported, while it helps Canadians support local businesses.

% Agree Among Canadians Listening to AM/FM Radio During COVID-19

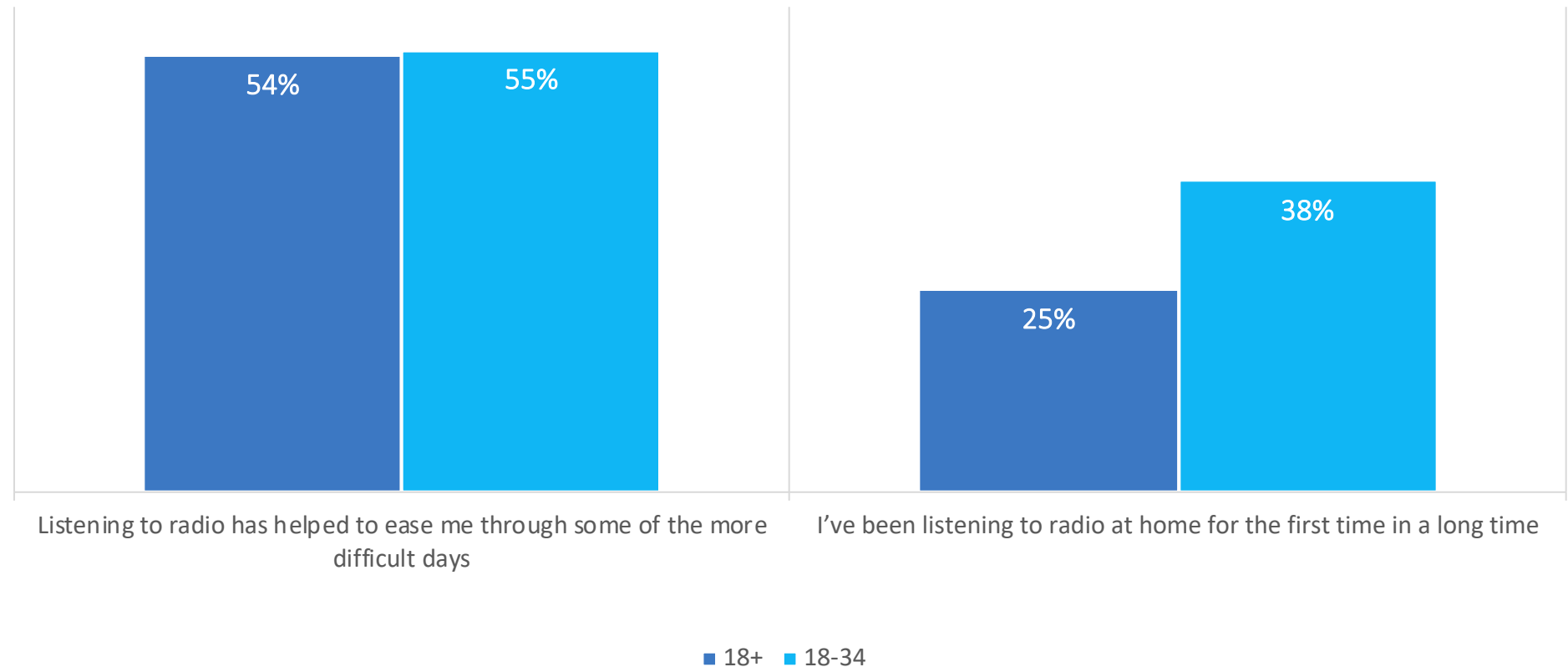
The COVID-19 Listener Experience—timely information, comfort and, for many, a rediscovery.



A18-34's are rediscovering AM/FM Radio at home.

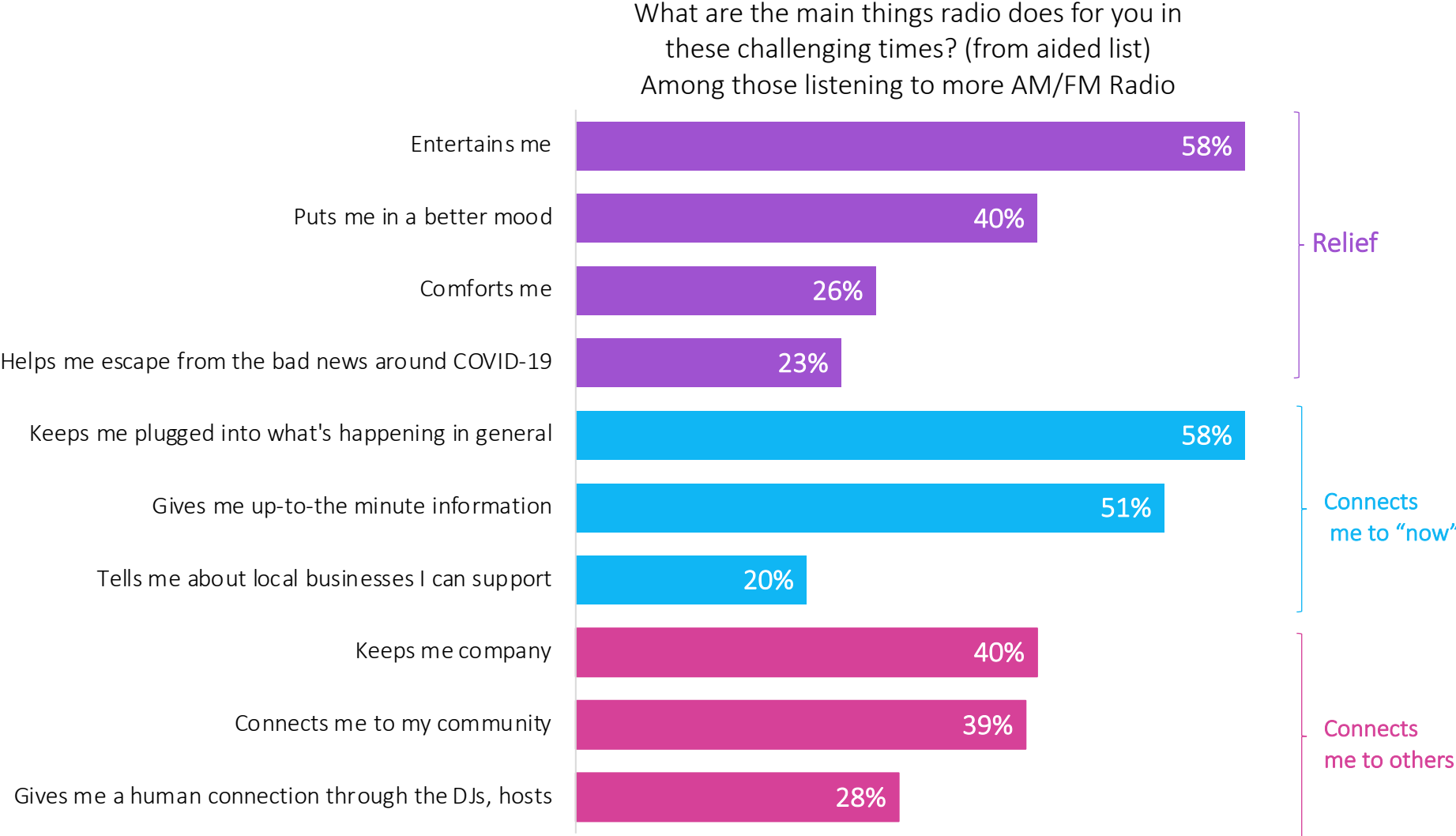
% Agree Among Canadians Listening to AM/FM Radio During COVID-19

Milestone and Maturing Millennials are rediscovering AM/FM Radio at home, and are being comforted by what they are hearing.



The key benefits of Radio are enhanced during self-isolation.

AM/FM Radio delivers on a wide range of listener needs during the crisis, providing relief and connection.

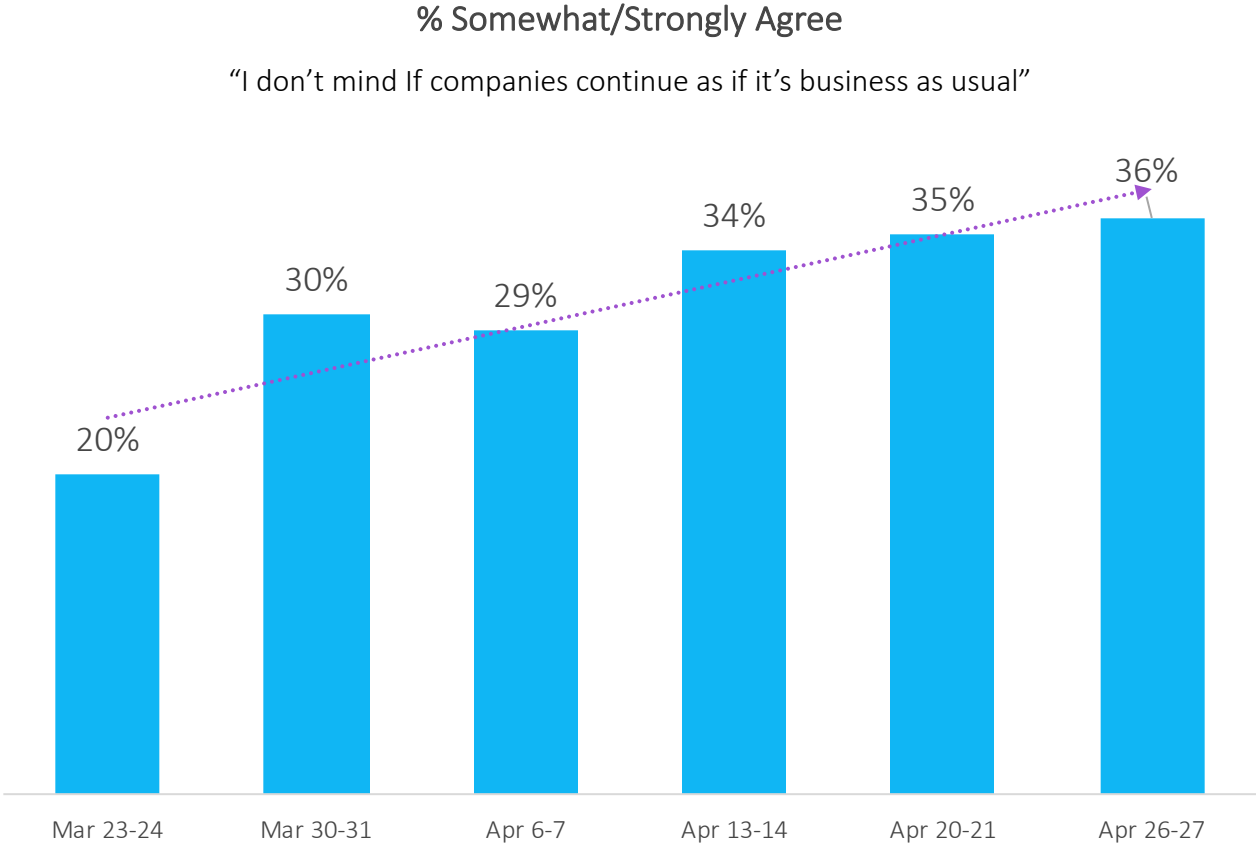


SOURCE: Angus Reid COVID-19 Weekly Monitoring of Canadian Perceptions & Behaviour, April 20 MP3. "What would you say are the main things that radio does for you in these challenging times? (from aided list) Base: Canadians 18+ who are listening to more AM/FM Radio in past two weeks (n=164)

Canadians still want to hear from brands.

78%

of Canadians say, “It’s reassuring to hear from Canadian companies at this time”.



Canadians want action, not just platitudes.

It's not enough to say, "we're all in this together" — brands need to make a difference, or help consumers navigate the "new normal".

86%

of Canadians said they believe "brands have an enormous platform to do good, while still earning profit"

82%

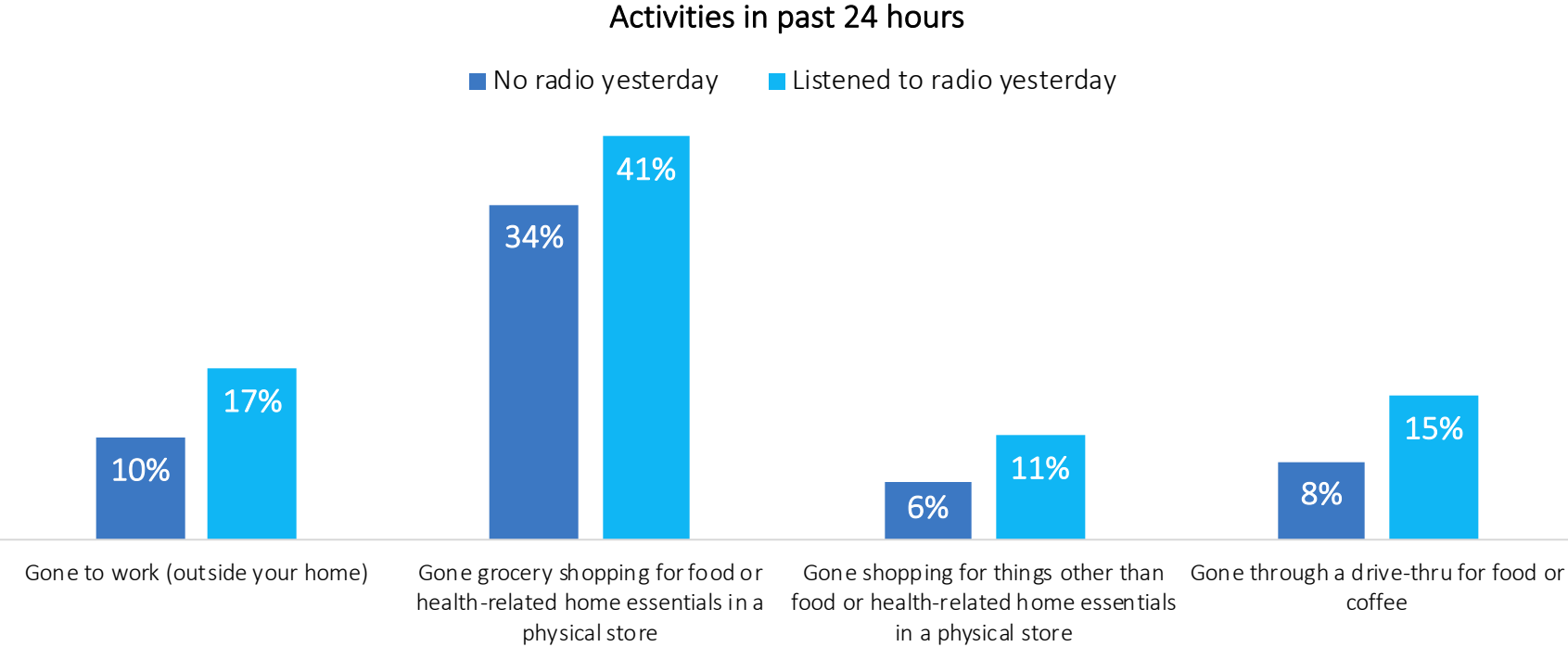
of Canadians said "Canadian companies that take an active role during this crisis will have gained a loyal customer in me"

78%

of Canadians said "I want to hear about sales, discounts, and reduced shipping on items I frequently purchase"

Radio listeners more likely to be “out and about”.

While Canada shelters at home, radio reaches essential service workers and Canadians who are providing for family and friends.

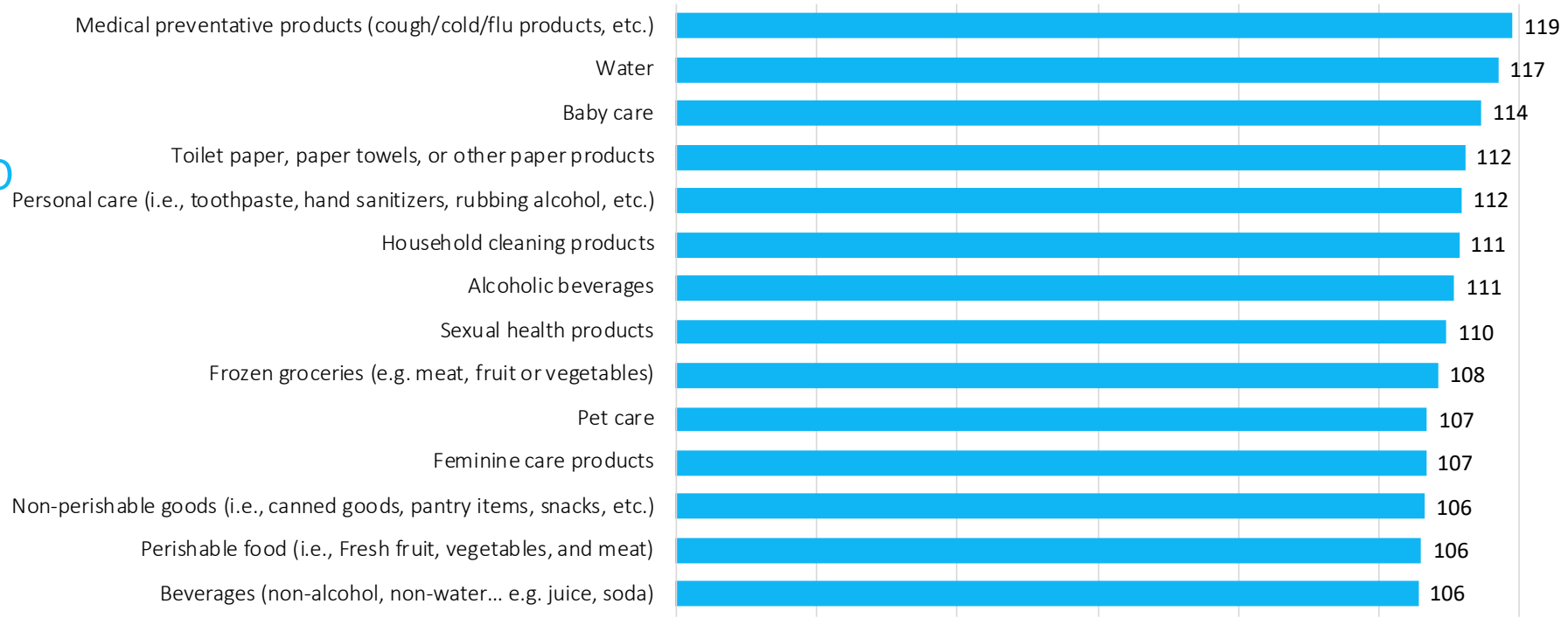


Radio listeners are stocking up.

As the household's designated shoppers, radio listeners are also more likely to ensure the household has enough essential supplies.

What extra supplies, if any, have you purchased for your home in the last week due to coronavirus/ COVID-19?

Radio Listeners - Indexed to All Canadian Adults



As Canadians continue to adjust to the demands and restrictions of staying at home, Radio continues to provide an important connection.

“Radio is still an integral part of the media mix, particularly now during COVID-19. Its role varies, but one specific advantage is the ability to augment national presence by going deeper into specific markets where consumers are closely attached to their local personalities” – Nileen Ventura | VP, Channel Insights and Discovery | Horizon Media Canada



Despite changes in listening habits, Canadians are still connecting with AM/FM Radio.

- Even with fewer cars on the road, Canadians 12+ are being reached by radio – retaining 85% of reach since before COVID-19. (1)
- As listening locations shift, Canadians are rediscovering radio at home: A18+ in-home tuning is up +19%, A18-34 +16%, A18-49 +24% and A25-54 +26%. (2)
- Streaming AM/FM Radio is gaining share of minutes tuned, up +32% A18+, +62% A18-34, +52% A18-49 and +52% A25-54, vs. Pre-COVID-19. (2)
- Listening is occurring across multiple platforms; streaming on smart speakers has increased +24 % since pandemic measures were instituted. (2)

Source: (1). Numeris PPM, Non-Currency* Total Canada 12+, Mo-Su 2a-2a, AVWK CUME (000), Weeks 24-35 19/20 2. Numeris PPM, Non-Currency* Total Canada 18+, Mo-Su 2a-2a, AMA(000), Weeks 24-35 19/20, By Location 3. Numeris PPM, Non-Currency* Total Canada 18+, Mo-Su 2a-2a, AMA(000), Weeks 24-35 19/20, By Platform (2) Angus Reid COVID-19 Weekly Monitoring of Canadian Perceptions & Behaviour March 6-7, Mar23-24, Mar 30-31, Apr 6-7, Apr 13-14, Apr 20-21, Apr 27-28 & MaruReports COVID-19 Feel Behave Think Tracker Canada, April 1 & April 8



Radio is keeping Canadians connected and delivers on a wide range of listener needs during the crisis providing relief and connection. (2)

- Canadians believe brands should be advertising, particularly if they give them important information on brands they regularly buy. (2)
- 86% of Canadians believe that brands have an enormous platform to do good, while still earning profit. (2)
- Canadian companies that are taking an active role supporting workers and their communities will gain loyal customers. (2)
- Radio listeners are “out and about” and are also more likely to ensure the household has enough essential supplies, and they want to hear about sales, discounts, and reduced shipping on items they frequently purchase. (2)

It’s not enough to say, “we’re all in this together” —brands need to make a difference, or help consumers navigate the “new normal”. (2)

Source: (2) Angus Reid COVID-19 Weekly Monitoring of Canadian Perceptions & Behaviour March 6-7, Mar23-24, Mar 30-31, Apr 6-7, Apr 13-14, Apr 20-21, Apr 27-28 & MaruReports COVID-19 Feel Behave Think Tracker Canada, April 1 & April 8