

Canada Starts To Emerge

Many Canadians are planning an active summer, and AM/FM Radio will be their companion.

July 2020



Heavy Radio listeners
are eager to embrace
summer activities -
looking to spend
money on vehicles,
domestic travel, and
outdoor items.

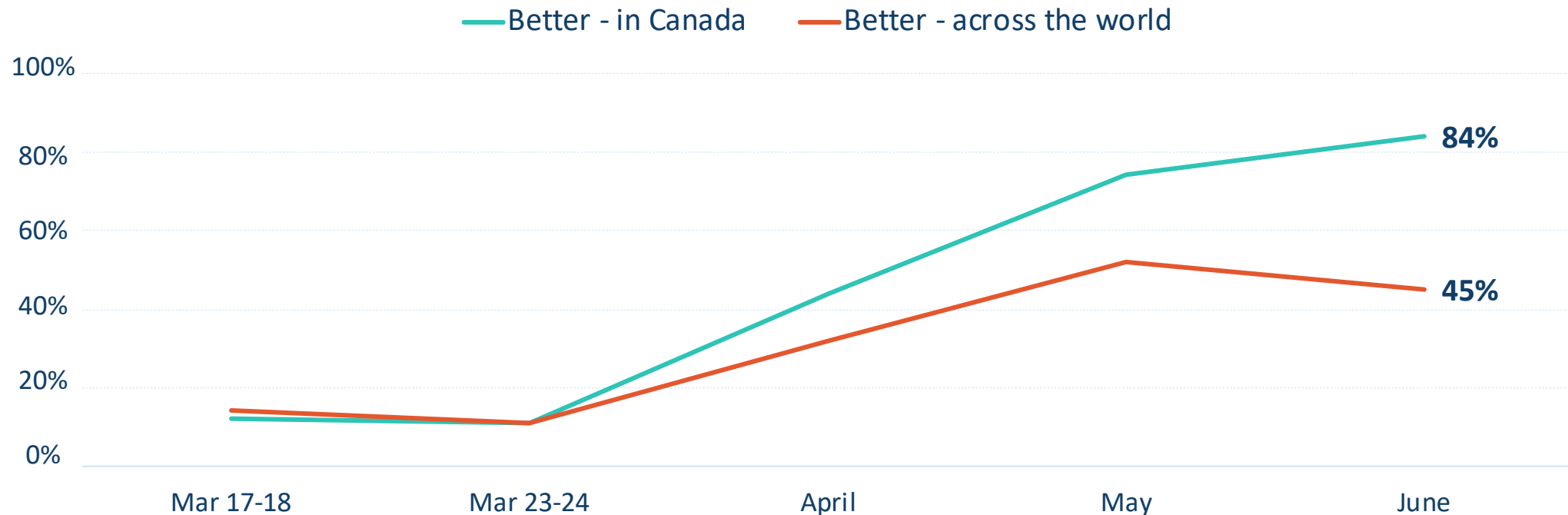
SOURCE: Angus Reid Forum.
June 22-23, 2020

- As Canada emerges from COVID-19 restrictions, and businesses and consumers look to return to some sort of “normal”, AM/FM Radio is along for the ride.
- The following provides insights on Canadians, their attitudes and hopes for the near future, taken from a recent survey with Signal Hill Insights and Angus Reid Forum.
- This summer, 3-in-4 Canadians expect to resume *most/some* of their “normal” activities—***heavy radio listeners are 14% more likely*** to say they will resume most of their “normal” summer activities.
- As out-of-home tuning returns, AM/FM Radio audiences continue to build toward seasonal norms, offering advertisers key opportunities to reach those Canadians ready to spend.

CANADIANS SEE MORE PROGRESS ON MANAGING COVID-19 IN CANADA THAN ELSEWHERE

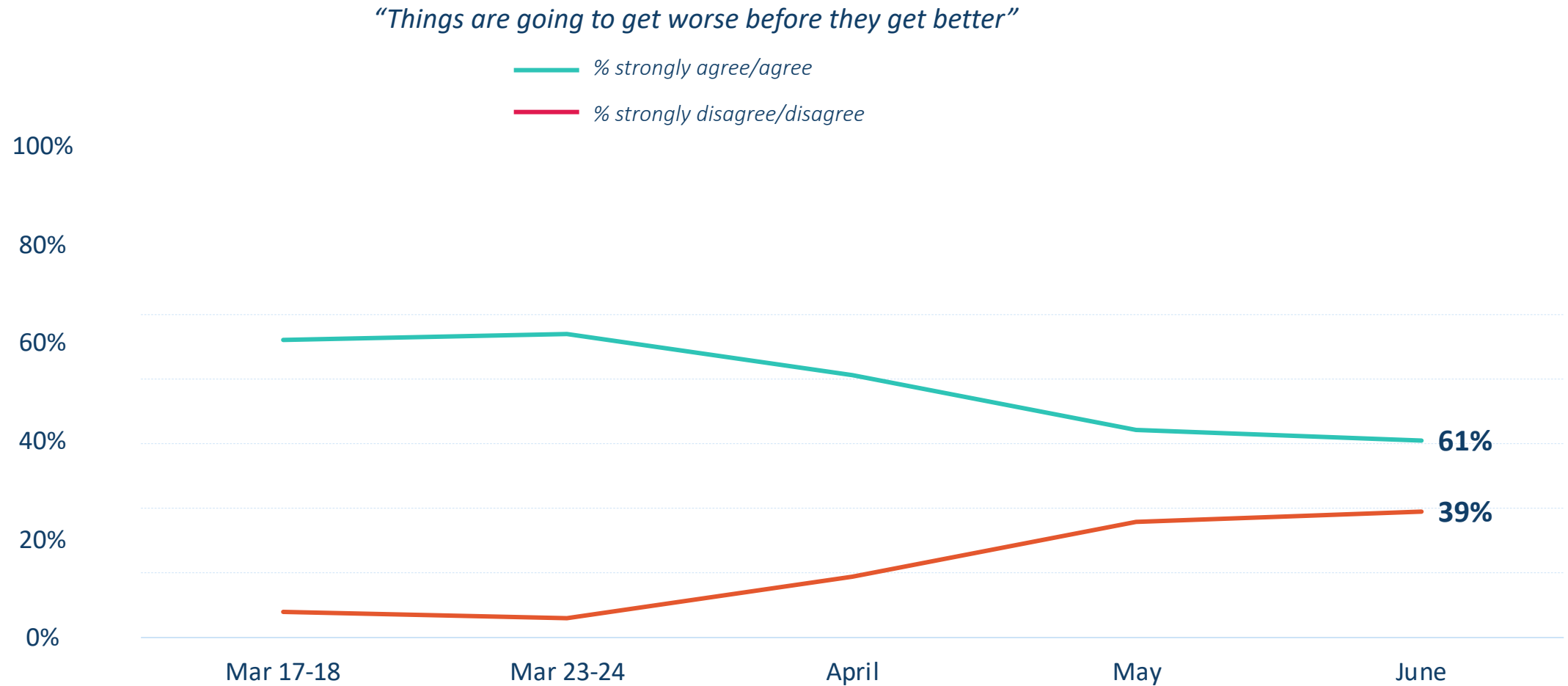
As new COVID-19 cases decline in Canada, while climbing elsewhere, Canadians feel greater optimism about how Canada is managing with the Coronavirus vs. the rest of the world.

Thinking about Coronavirus, Are Things Getting Better or Worse?



SOURCE: Angus Reid Forum. June 30-July 1, 2020
Thinking about coronavirus, are things getting better or worse?
Base: Canadians aged 18+. (n=1,001)

MOST CANADIANS SEE CHALLENGES AHEAD, BUT MANY NOW FEEL THE WORST DAYS ARE BEHIND US



SOURCE: Angus Reid Forum. June 30-July 1, 2020

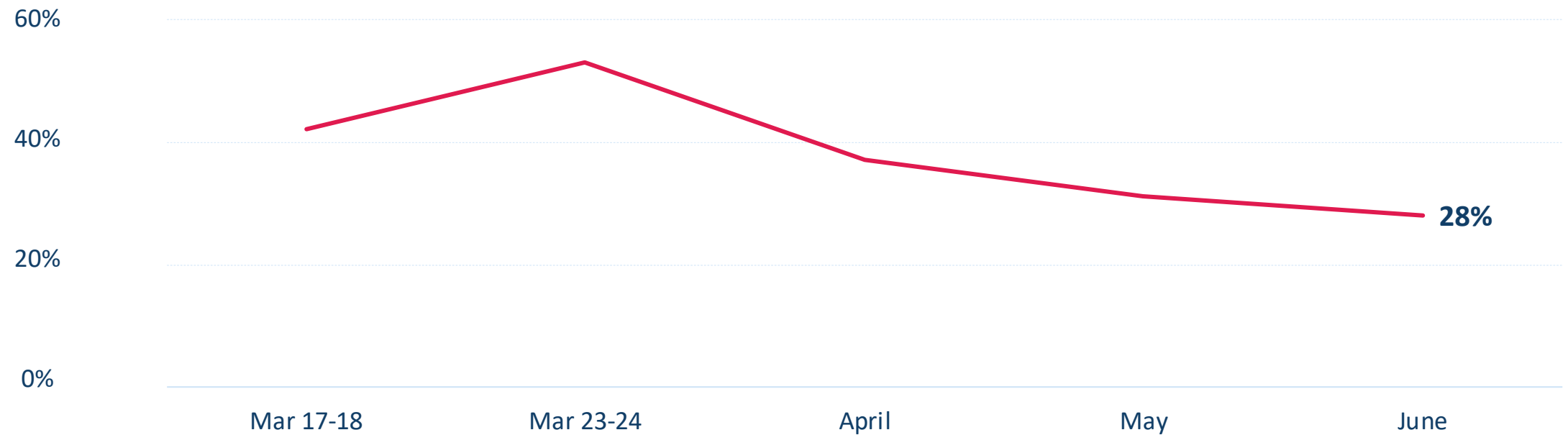
To what extent do you agree or disagree with the following statements about the coronavirus?

Base: Canadians aged 18+. (n=1,001)

CONCERN ABOUT PERSONAL FINANCES EASING

Concern about personal finances is declining from late March, when most Canadians were deeply concerned about their finances.

How Concerned Are You About Personal Finances? (% extremely/very)



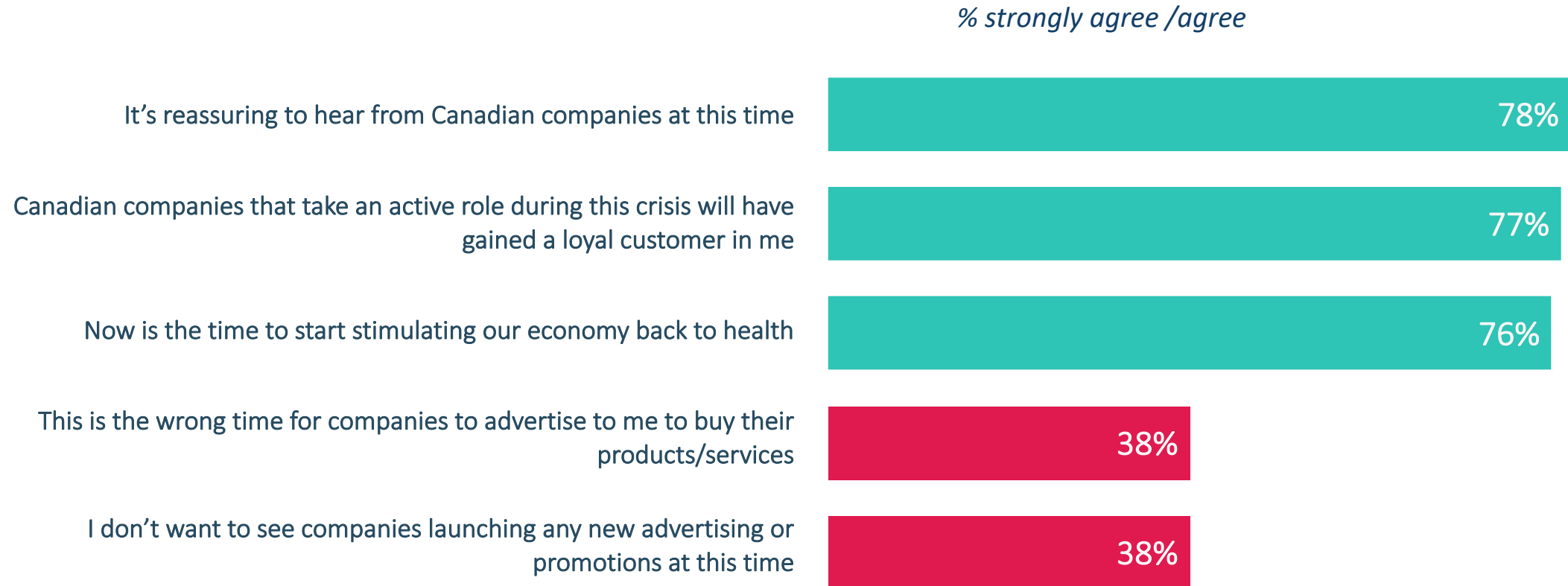
SOURCE: Angus Reid Forum. June 30-July 1, 2020

As a result of the coronavirus, how concerned are you about your personal finances?

Base: Canadians aged 18+. (n=1,001)

CANADIANS ARE RECEPTIVE TO HEARING FROM BRANDS RIGHT NOW

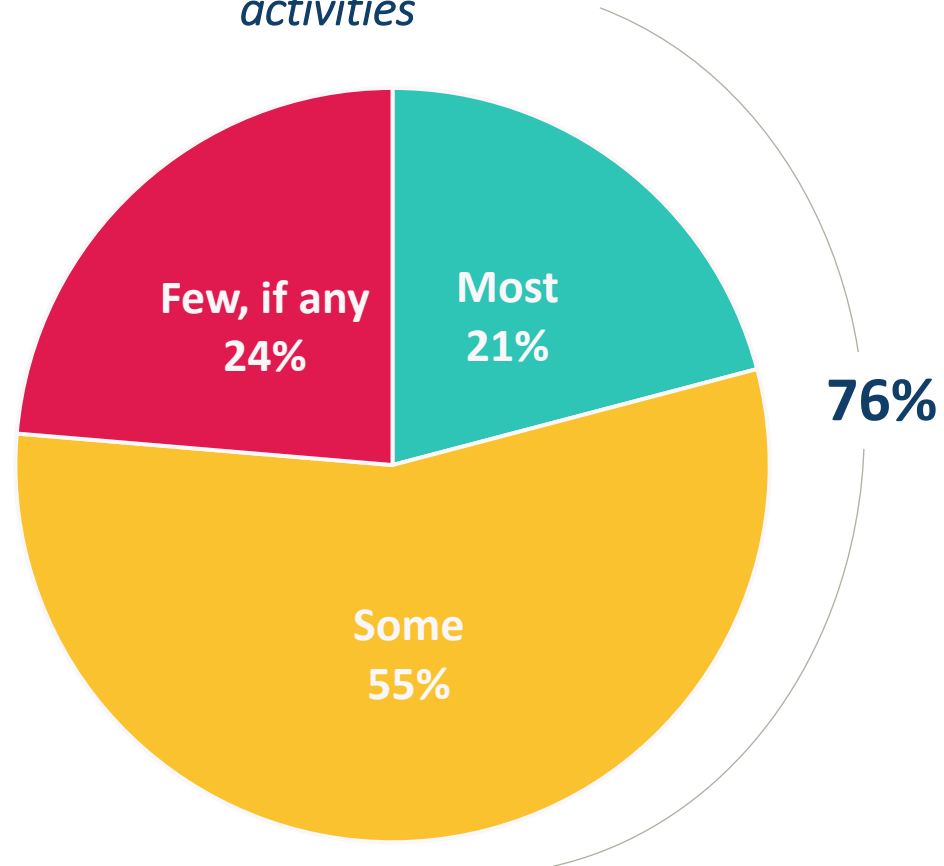
Advertising is welcome as the economy is nursing itself back to health.



SOURCE: Angus Reid Forum. June 30-July 1, 2020
To what extent do you agree or disagree with the following statements about the coronavirus?
Base: Canadians aged 18+. (n=1,001)

MORE THAN 3-IN-4 CANADIANS EXPECT TO RESUME MOST OR SOME OF THEIR “NORMAL” ACTIVITIES THIS SUMMER

*% of Canadians expecting to resume
most/some/few of their normal summer
activities*

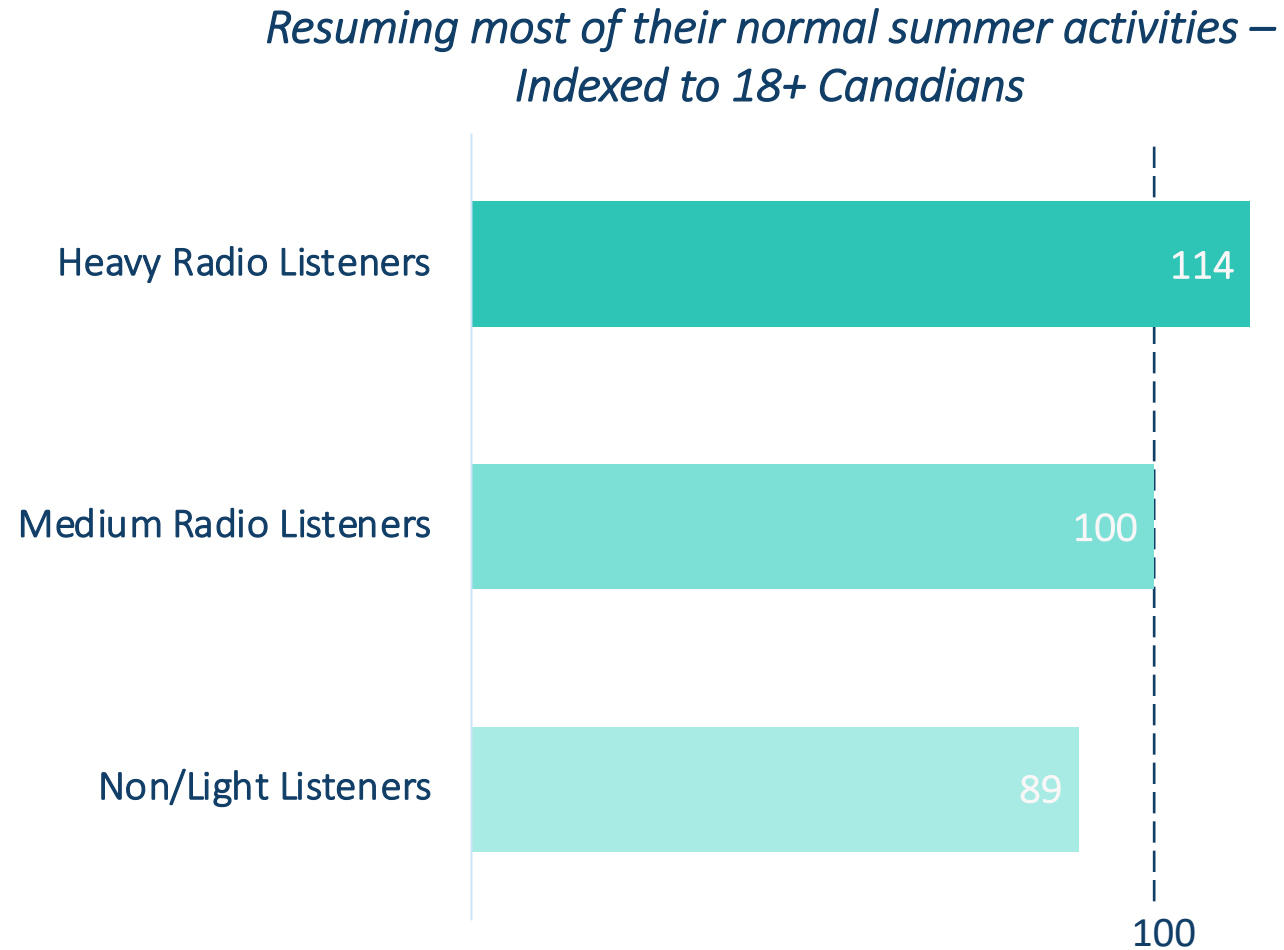


SOURCE: Angus Reid Forum. June 22-23, 2020

Looking ahead to the next two months (late June to late August)—and thinking back to your activities in previous summers—do you expect that you will: ...?

Base: Canadians aged 18+. (n=1,001)

HEAVY RADIO LISTENERS ARE 14% MORE LIKELY THAN OTHER CANADIANS TO BE RESUMING MOST OF THEIR “NORMAL” ACTIVITIES THIS SUMMER



SOURCE: Angus Reid Forum. June 22-23, 2020

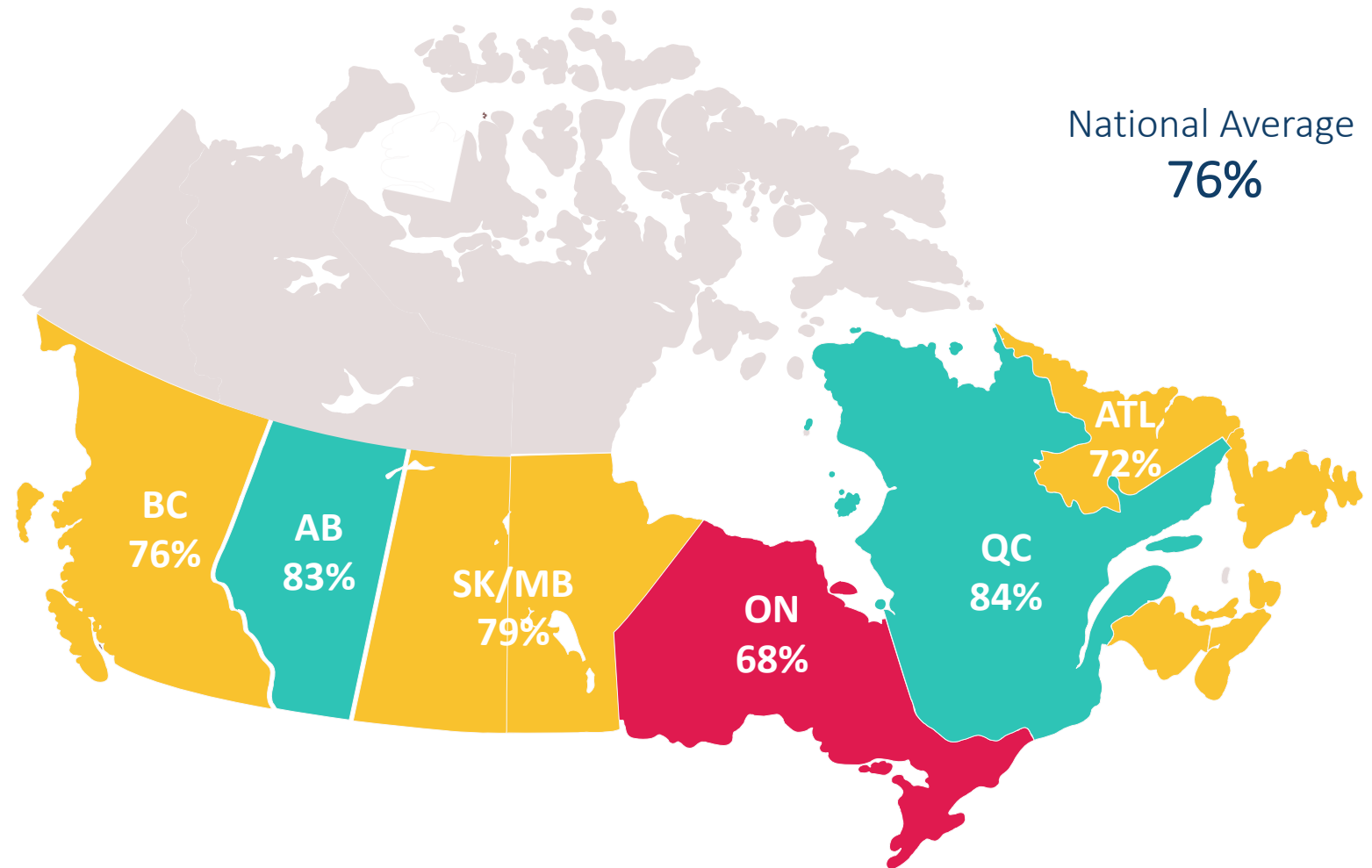
Looking ahead to the next two months (late June to late August)—and thinking back to your activities in previous summers—do you expect that you will: ...?

Base: Canadians aged 18; Heavy Radio Listeners (n=214); Medium Radio Listeners (n=317); Non/Light Listeners (n=317);

AS REGIONS OPEN UP, MOST CANADIANS ARE READY TO RESUME SOME OR MOST OF THEIR “NORMAL” SUMMER ACTIVITIES

Quebecois and Albertans were most likely to say they'll resume most of their normal summer activities, while Ontarians* fell below the national average at the time of the survey.

*Toronto lagged behind most of Ontario due to later openings in the densely populated GTA. (The survey was conducted June 22/23; Stage 2 for Toronto started June 24.)



SOURCE: Angus Reid Forum. June 22-23, 2020 *STAGE 2 OF TORONTO STARTED JUNE 24 2020

Looking ahead to the next two months (late June to late August)—and thinking back to your activities in previous summers—do you expect that you will: ...?

Base: Canadians aged 18+. (n=1,001), BC (n=143), AB (n=117), SK/MB (n=68), ON (n=395), QC (n=211), ATL (n=67)

HEAVY RADIO LISTENERS MORE LIKELY TO BE “READY TO GO” SUMMER CONSUMERS

Heavy AM/FM Radio listeners are eager to embrace summer activities, more likely to be planning to spend on vehicles, domestic travel, and outdoor items such as gardening, camping equipment and barbecues.

Expected Spending over Next 2 Months by Heavy Radio Listeners—Indexed to 18+ Canadians



SOURCE: Angus Reid Forum. June 22-23, 2020

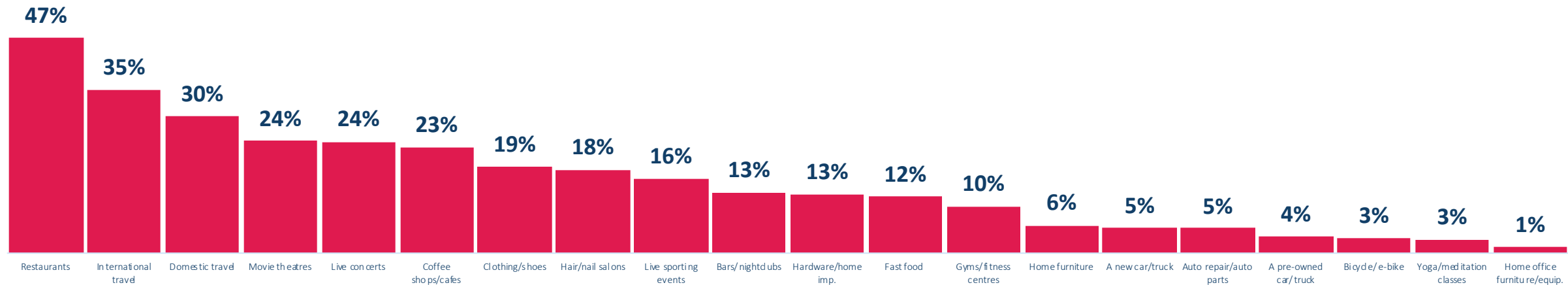
Please indicate all those goods and services on which you expect you'll be spending money in the next two months?

Base: Canadians aged 18+. (n=1,001), Heavy Radio Listeners (n=214)

CANADIANS ARE DREAMING OF GETTING AWAY— OR AT LEAST AWAY FROM THE KITCHEN

Nearly half of Canadians are looking forward to spending at restaurants once things return to “normal,” followed by international and domestic travel.

Goods, services and activities Canadians are most looking forward to spending on



SOURCE: Angus Reid Forum, June 22-23, 2020

Looking farther ahead to when the pandemic is over and life returns to something approaching 'normal,' on which of the following goods, services and activities do you most look forward to spending money?

Base: Canadians aged 18+. (n=1,001)

RADIO IS BOUNCING BACK

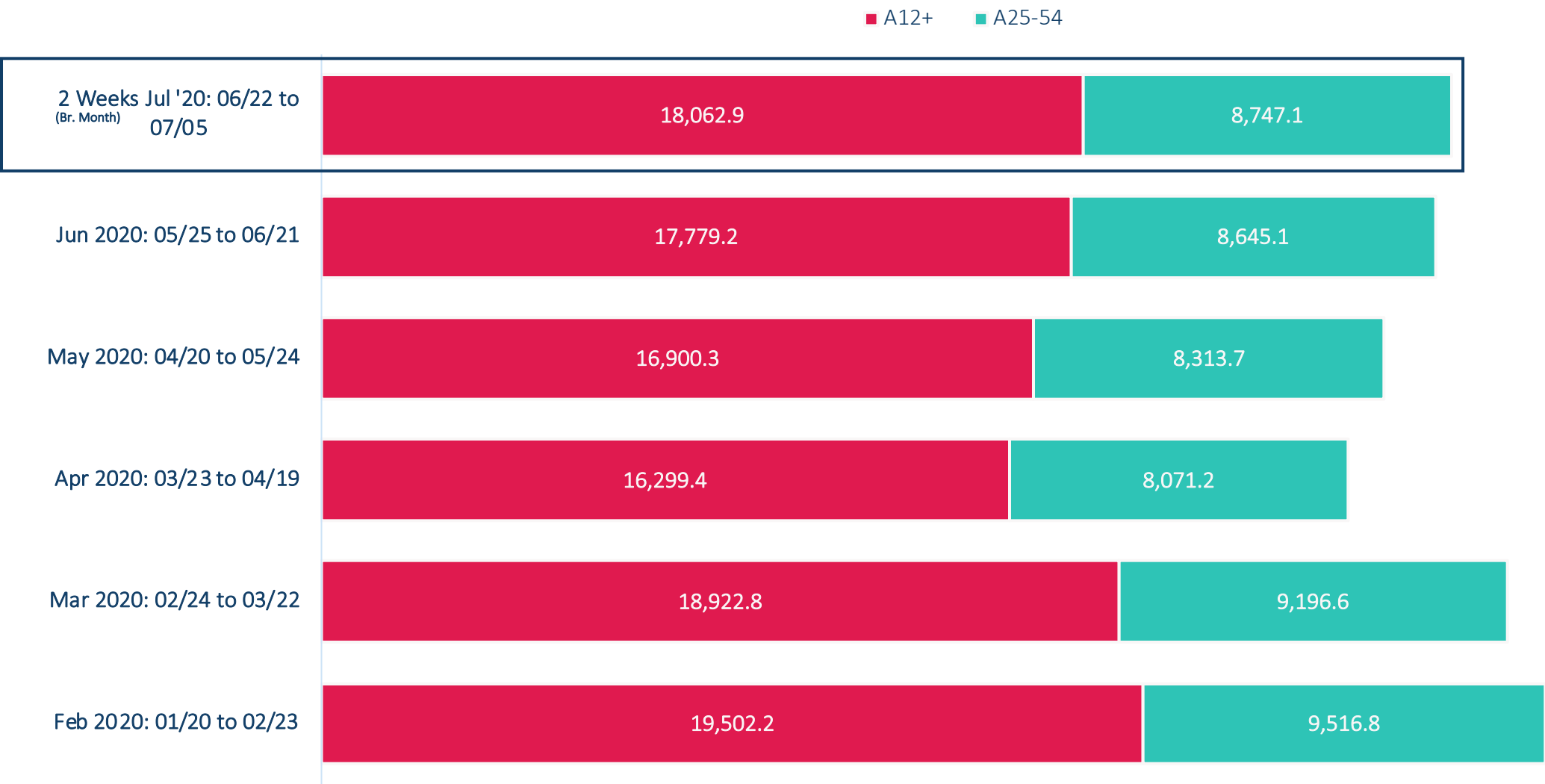
Consumers are doing whatever they can to get their lives back to normal. That means getting back to work, getting in their cars, and listening to their favorite AM/FM Radio stations.

Taking a look at recent PPM data, radio's reach is recovering quite nicely. For the first two weeks in July, A25-54 reach is currently at **92%** of February's levels.

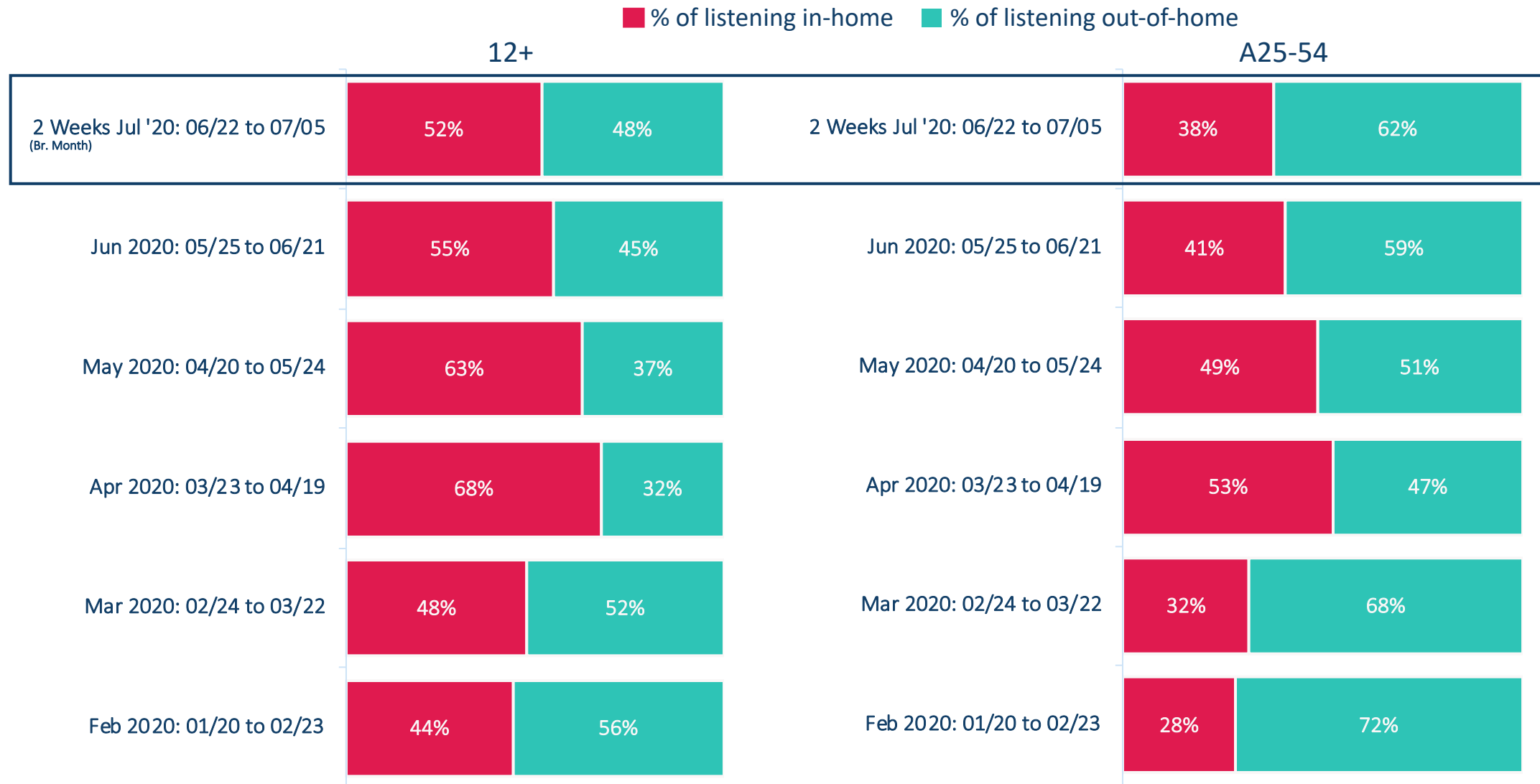
Perhaps most important, Out of Home listening - which accounts for a large percent of time spent listening to Radio - is also rebounding for A25-54 from its lowest point in April at **47%**, now **62%**.

For 3 consecutive months, listening is moving up across demos.

RADIO'S WEEKLY REACH, AS OF JULY 5th, 93% OF FEBRUARY 2020 LEVEL 12+; 92% FOR A25-54



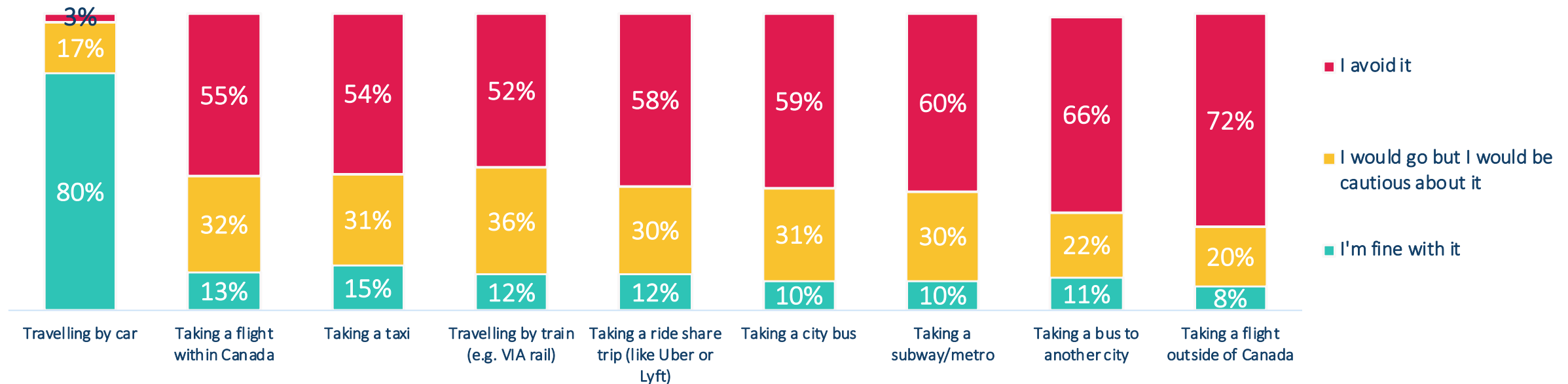
OOH LISTENING CONTINUES TO REBOUND



CANADA STILL A LONG WAY FROM FEELING COMFORTABLE IN PUBLIC TRANSIT AND SHARED VEHICLES

Nearly all Canadians are fine with travelling by car, but this does not extend to taxis and ride sharing services. Canadians are about as comfortable with public travel as they are with international travel right now.

Canadians' Comfort Level with Various Travel Activities

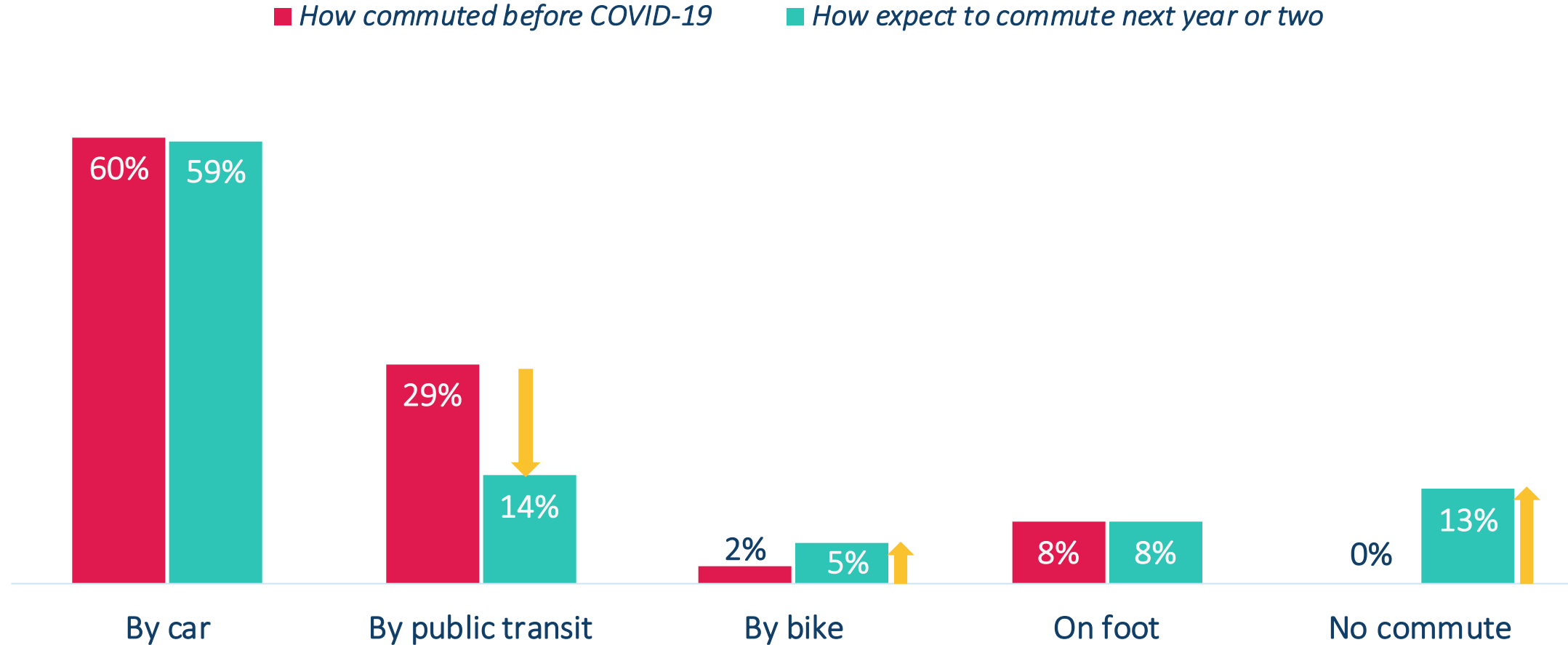


SOURCE: Angus Reid Forum, June 22-23, 2020

And how do you feel about ... ?

Base: Canadians aged 18+ who use/have access to each service (n=1,001)

NEW-AT-HOME WORKERS EXPECT TO COMMUTE BY CAR AFTER COVID-19—NOT BY TRANSIT



SOURCE: Angus Reid Forum, June 22-23, 2020

Please select the options below that best represent how you commuted to and from work before COVID-19, and how you expect you might commute to work in the next year or two.

Base: Canadians aged 18+. Worked out of home before COVID; working at home now (n=232)

Summary

- Optimism around Canada's management of COVID-19 is reflected in sentiments about financial security, and Canadians' interest in hearing from brands.
- Heavy radio listeners are leading the charge as Canadians emerge, spending on automotive, summer activities and other big-ticket consumer goods.
- AM/FM Radio audiences continue to grow, with A25-54 reach now at 92% of Pre-Covid-19 levels, and out-of-home listening growing weekly.
- Prospects for more growth of out-of-home listening are strong as Canadians now working from home expect to be commuting by car in the "future normal".