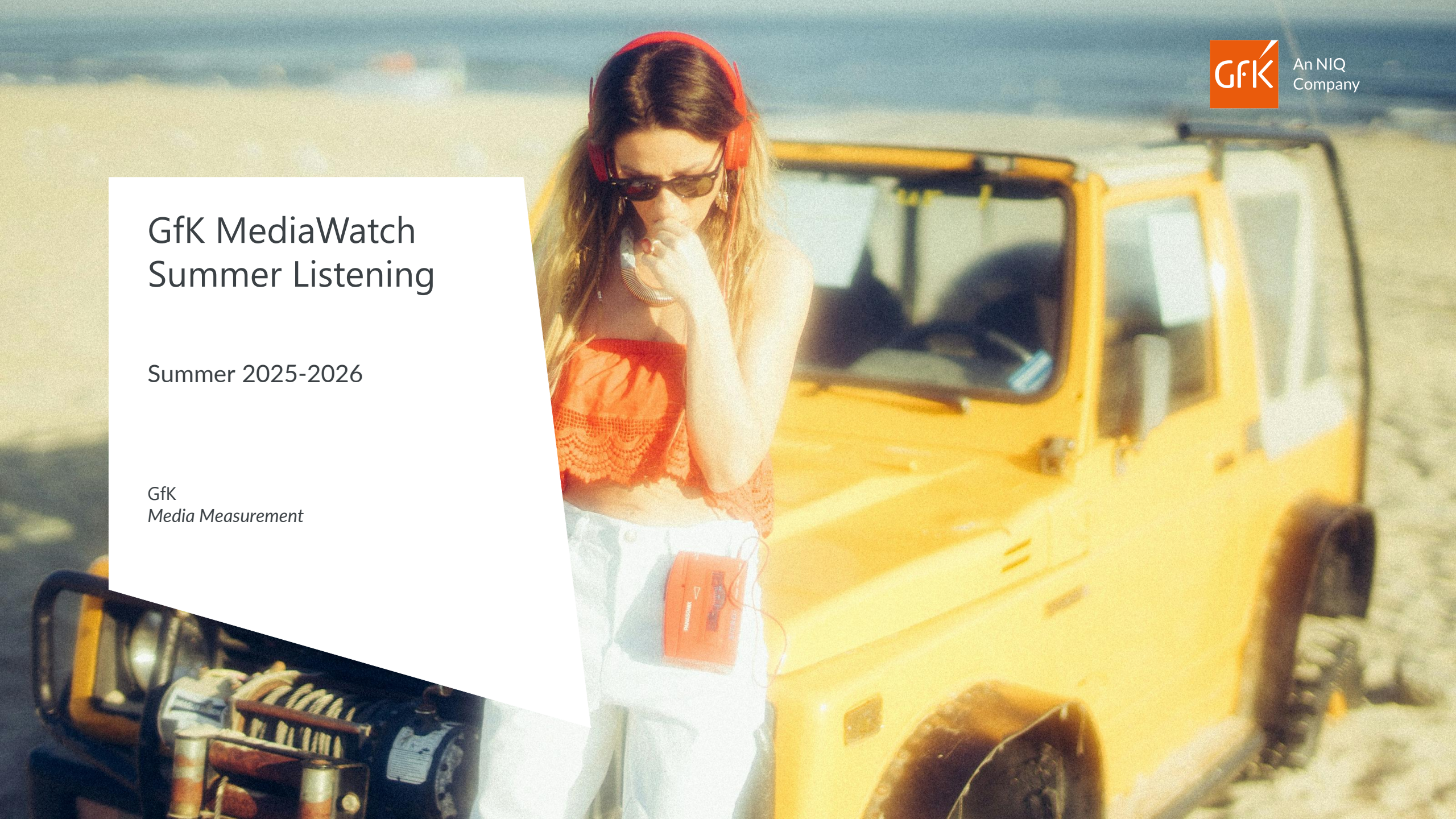


GfK MediaWatch Summer Listening

Summer 2025-2026

GfK
Media Measurement

GfK An NIQ Company

Summer Listening highlights

Listeners remain stable over summer period

During the summer period there are just as many listeners to Commercial Radio, but they listen at different times of day

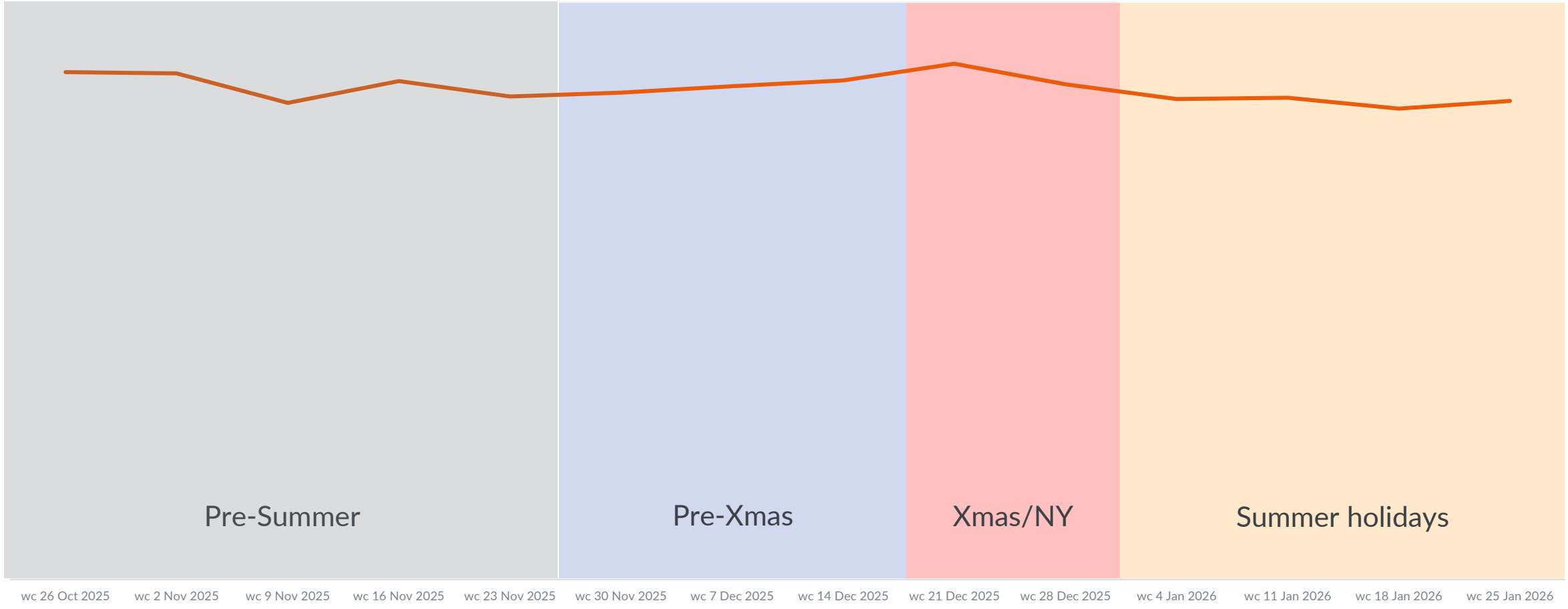
- Commercial Radio listeners 10+ stable over the summer period
  - increase in listeners during Mon-Sun evenings (up 9%) & mid-dawns (up 16%)
- Commercial Radio increased TSL in weekend breakfast (up 7%) & Mon-Sun mid-dawns (up 7%)
- 7% increase in weekly Commercial Radio listeners aged 25-54 over the summer period
  - Up 8% weekdays and 7% weekends
- Shape of listening across the day varies across summer
  - Consistent with previous years
  - Pre-Xmas listening patterns are similar to pre-summer period
  - Listening over Xmas/NY period starts and peaks later
  - Summer holidays have less listening 3-6pm and more listening in Mon-Sun nights & mid-dawns compared to pre-summer

Source: GfK MediaWatch Panel, SMBAP, P10+, Commercial Radio, Mon–Sun 12mn-12mn, listening for 1min or more within defined period (unless otherwise stated). Weekly Reach & TSL, Pre-Summer (26 Oct – 29 Nov 25), Summer (30 Nov 25 – 31 Jan 26). Proportion of listening - The percentage of listening (volume) a daypart has of the total commercial radio listening, Pre-Xmas (30 Nov - 23 Dec 25), Xmas/NY (24 Dec 25 - 1 Jan 26), Summer holidays (2 Jan - 31 Jan 26)

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Commercial Radio Weekly Reach

Reach remains strong across the summer listening period

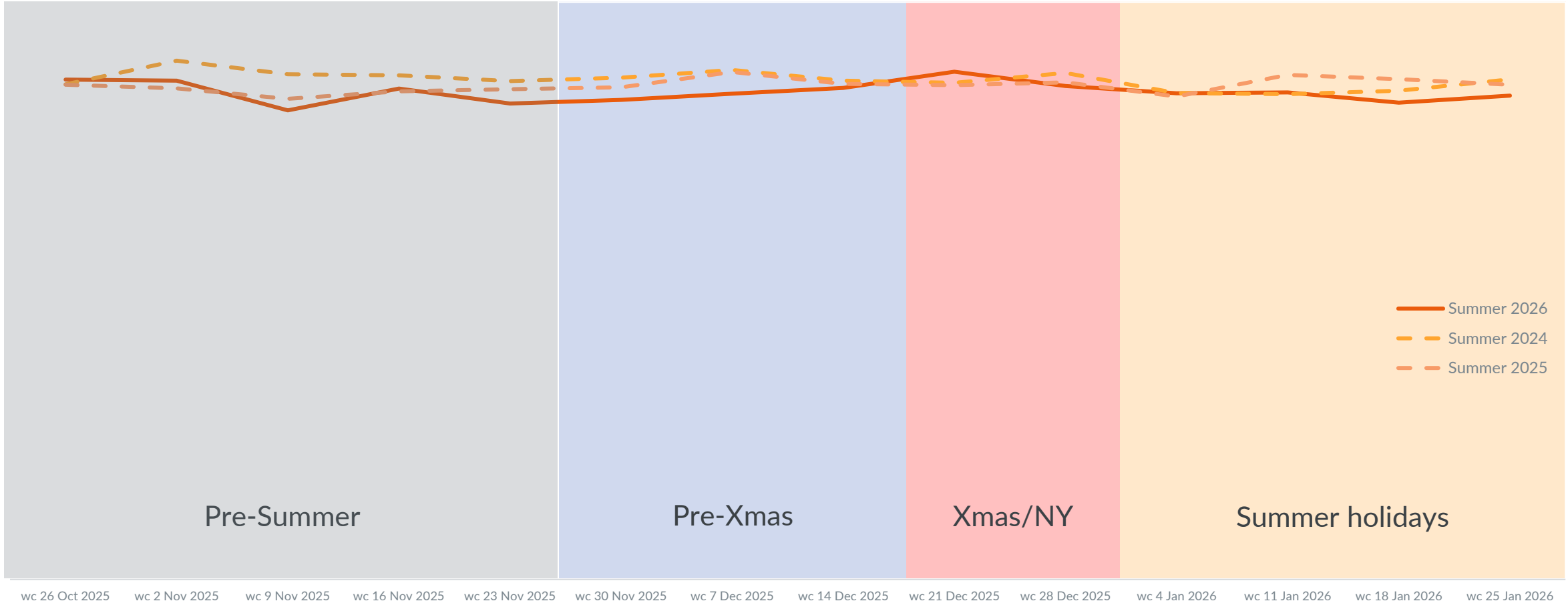


Source: GfK MediaWatch Panel, SMBAP, P10+, Mon–Sun 12mn-12mn, Weekly reach, listening for 1min or more within defined period.

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Commercial Radio Weekly Reach Trend

Reach remains strong across the summer listening period

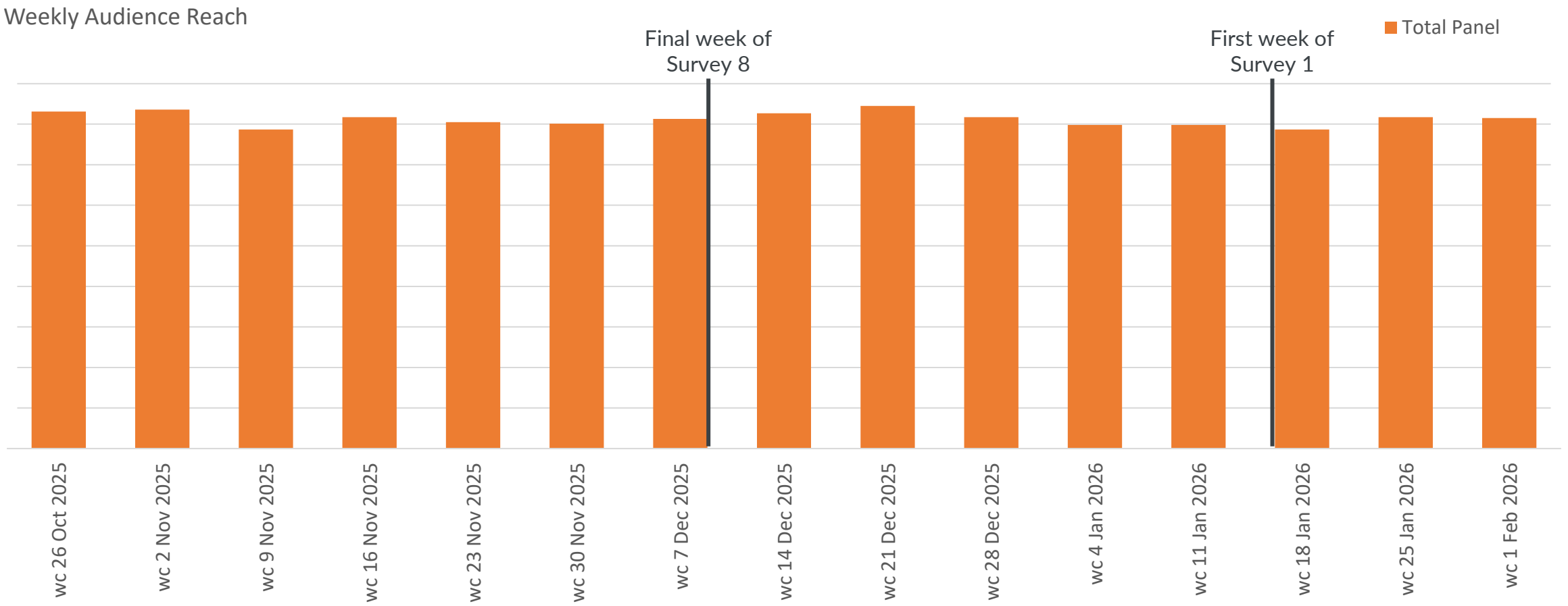


Source: GfK MediaWatch Panel, SMBAP, P10+, Mon–Sun 12mn-12mn, Weekly reach, listening for 1min or more within defined period. Summer 2024: from w/c 29 Oct 2023 – w/c 28 Jan 2024, Summer 2025 from w/c 27 Oct 2024 – w/c 26 Jan 2025

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Weekly Summer Listeners – Total Radio - SMBAP

Listener levels consistent with pre-summer for most of the summer period

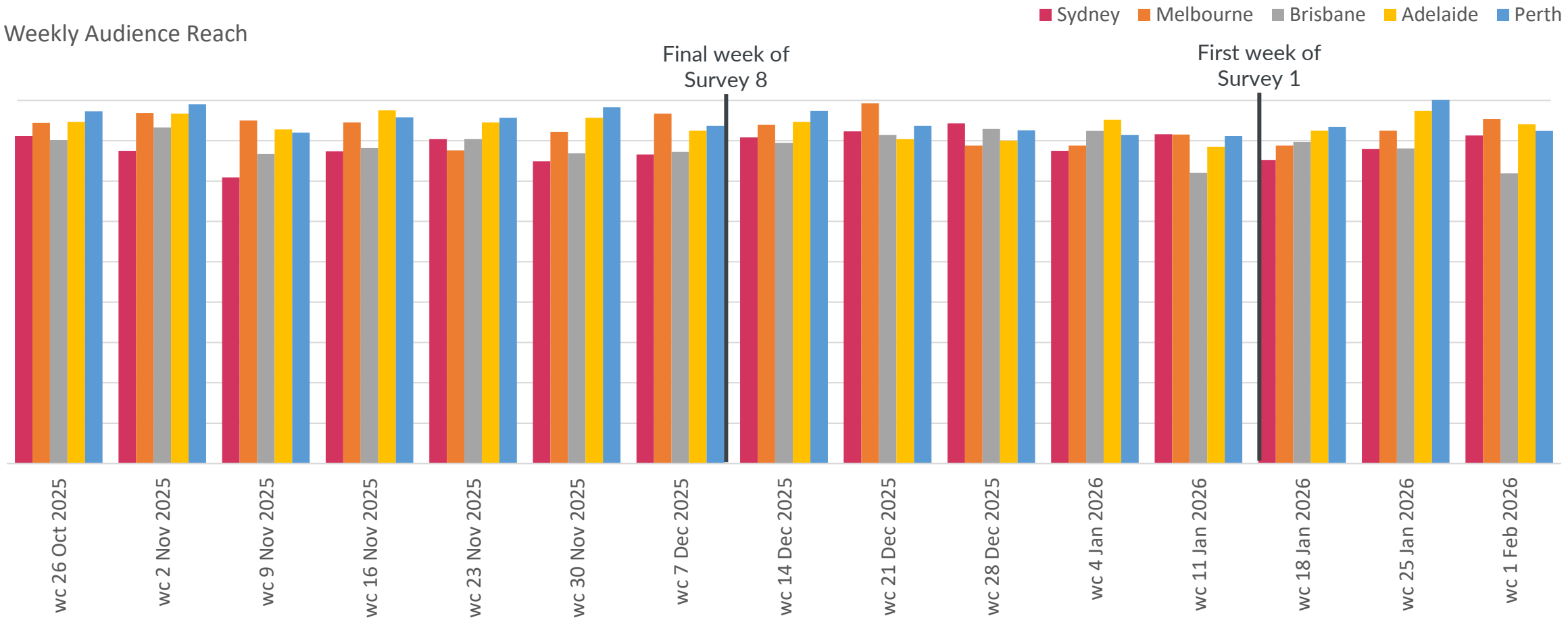


Source: GfK MediaWatch Panel, SMBAP, P10+, Mon-Sun 12mn to 12mn, Weekly Reach %, listening for 1min or more within defined period.

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Weekly Summer Listeners – Total Radio By Market

Listener behaviour over summer varies by market

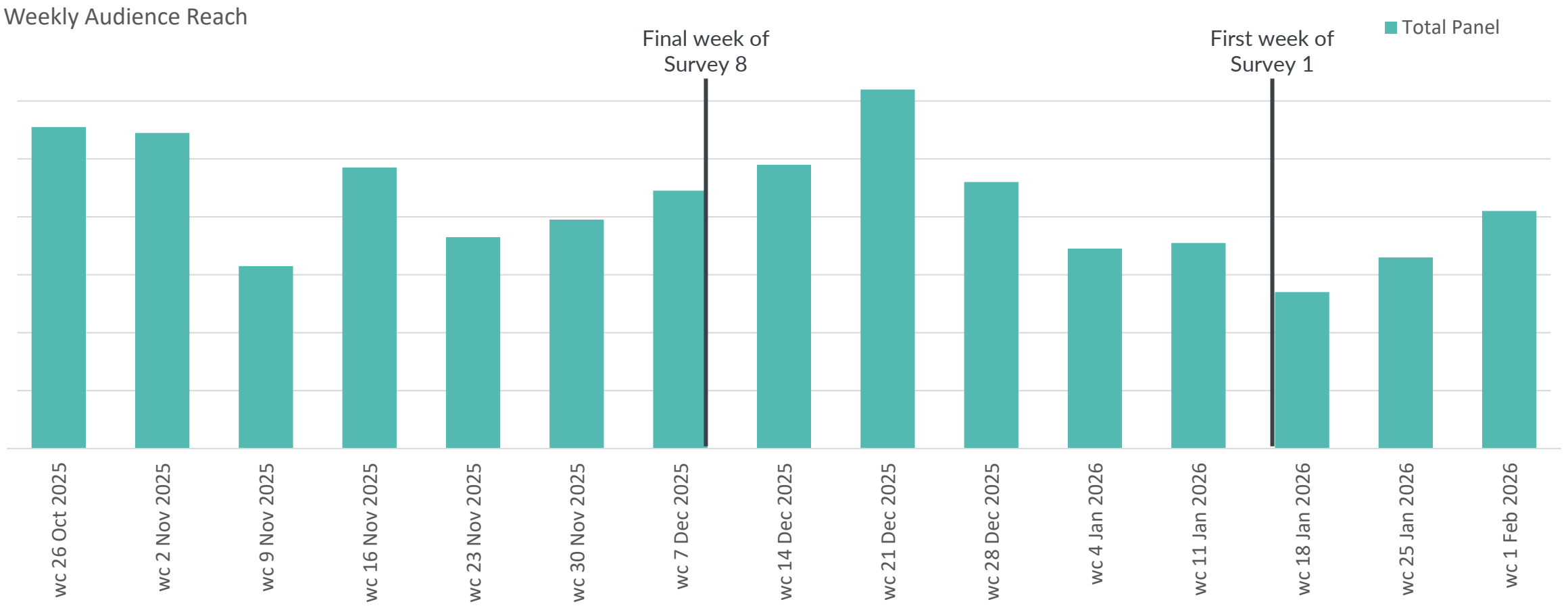


Source: GfK MediaWatch Panel, SMBAP, P10+, Mon-Sun 12mn to 12mn, Weekly Reach %, listening for 1min or more within defined period.

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Weekly Summer Listeners – Commercial Radio - SMBAP

Listener levels consistent with pre-summer for most of the summer period

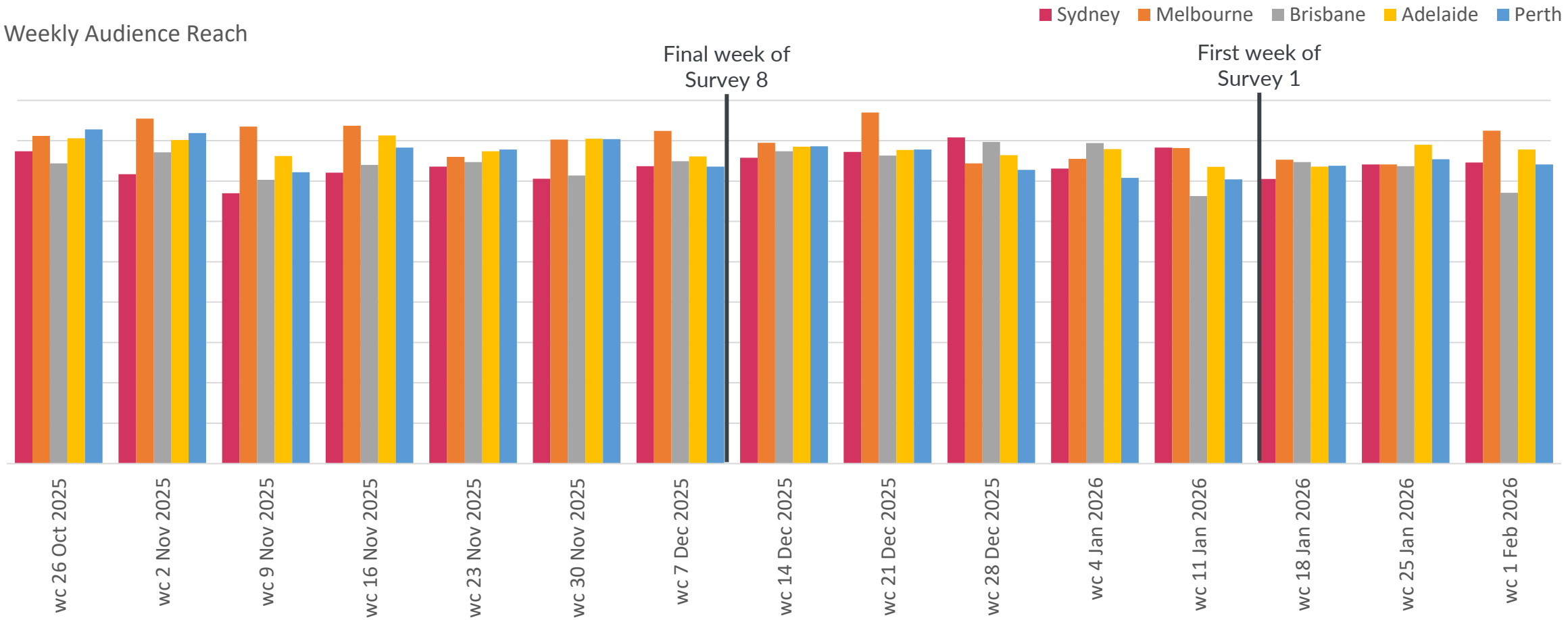


Source: GfK MediaWatch Panel, SMBAP, P10+, Mon-Sun 12mn to 12mn, Weekly Reach %, listening for 1min or more within defined period.

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Weekly Summer Listeners – Commercial Radio By Market

Listener behaviour over summer varies by market

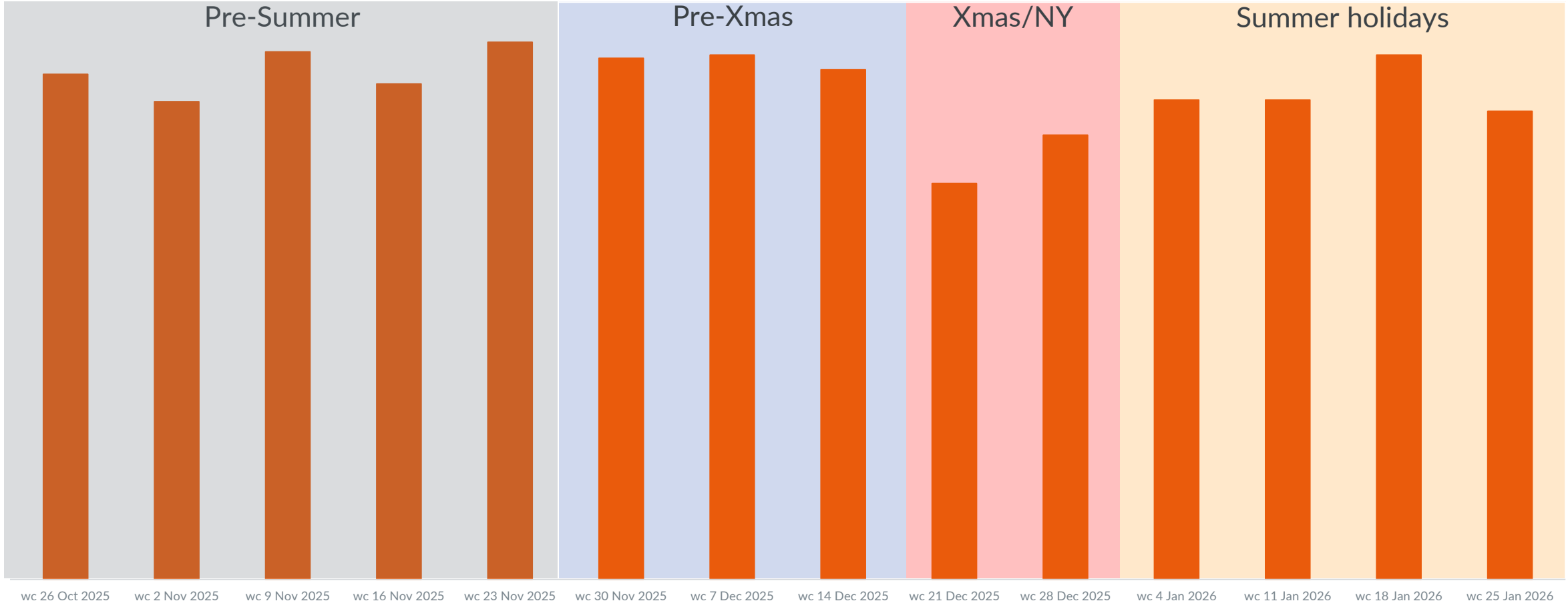


Source: GfK MediaWatch Panel, SMBAP, P10+, Mon-Sun 12mn to 12mn, Weekly Reach %, listening for 1min or more within defined period.

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Commercial Radio Weekly TSL

TSL strong across most of Summer, with declines over the Xmas/NY period

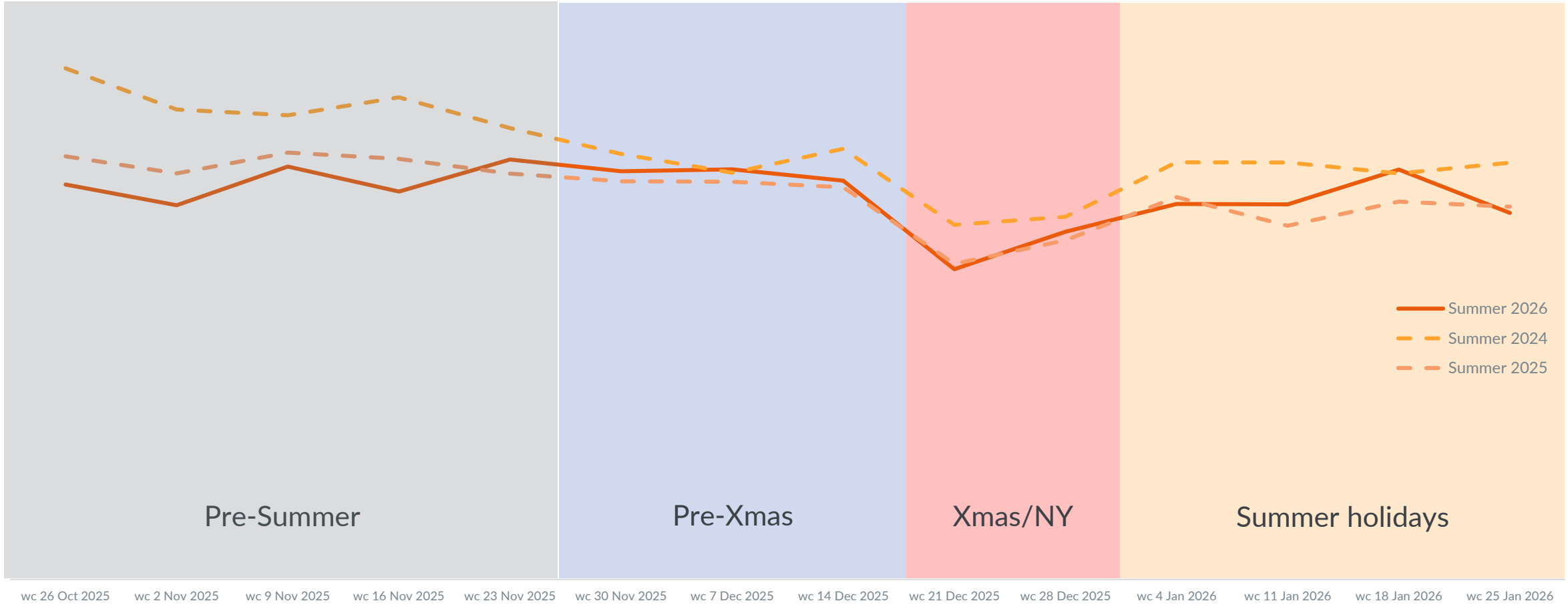


Source: GfK MediaWatch Panel, SMBAP, P10+, Mon–Sun 12mn-12mn, Weekly TSL, listening for 1min or more within defined period.

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Commercial Radio Weekly TSL Trend

TSL strong across most of Summer, with declines over the Xmas/NY period
TSL shows a variance of –1hr 45mins to +1hr compared with previous years

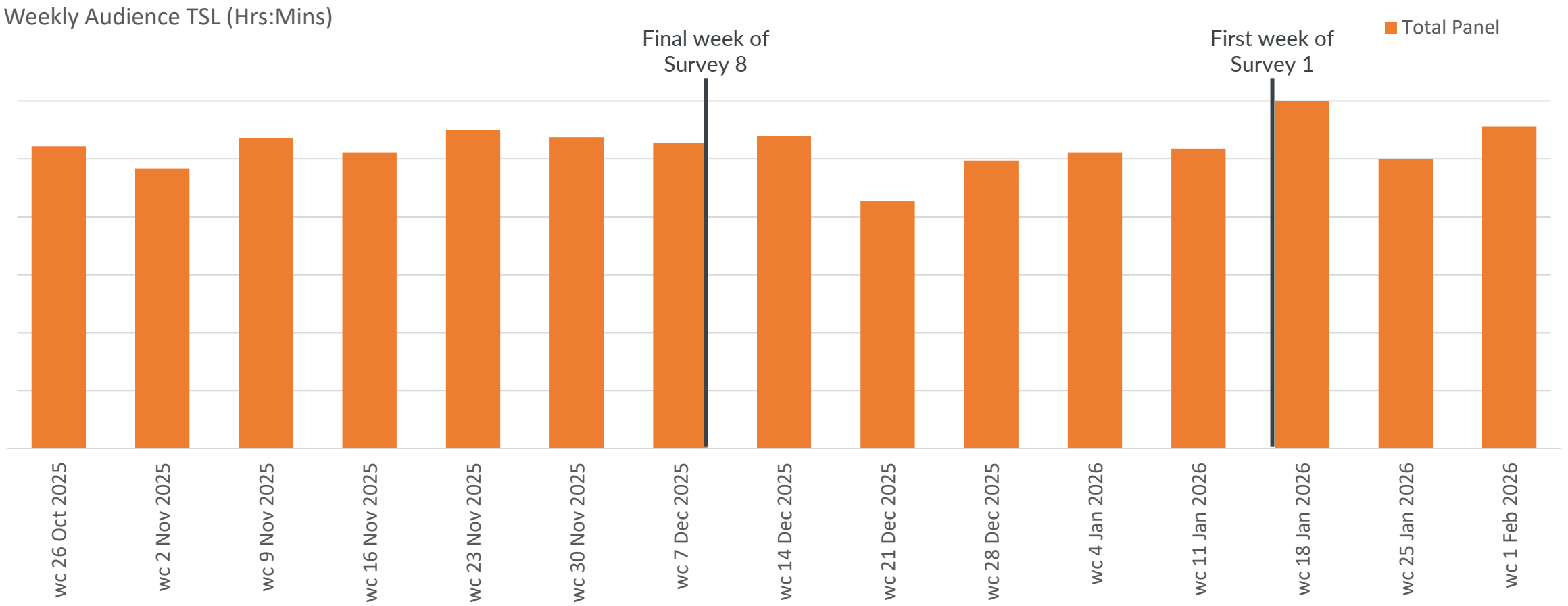


Source: GfK MediaWatch Panel, SMBAP, P10+, Mon–Sun 12mn-12mn, Weekly TSL, istening for 1min or more within defined period. Summer 2024: from w/c 29 Oct 2023 – w/c 28 Jan 2024, Summer 2025 from w/c 27 Oct 2024 – w/c 26 Jan 2025

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Weekly Summer Listening (TSL) – Total Radio – SMBAP

Time spent listening drops around an hour during week of Xmas

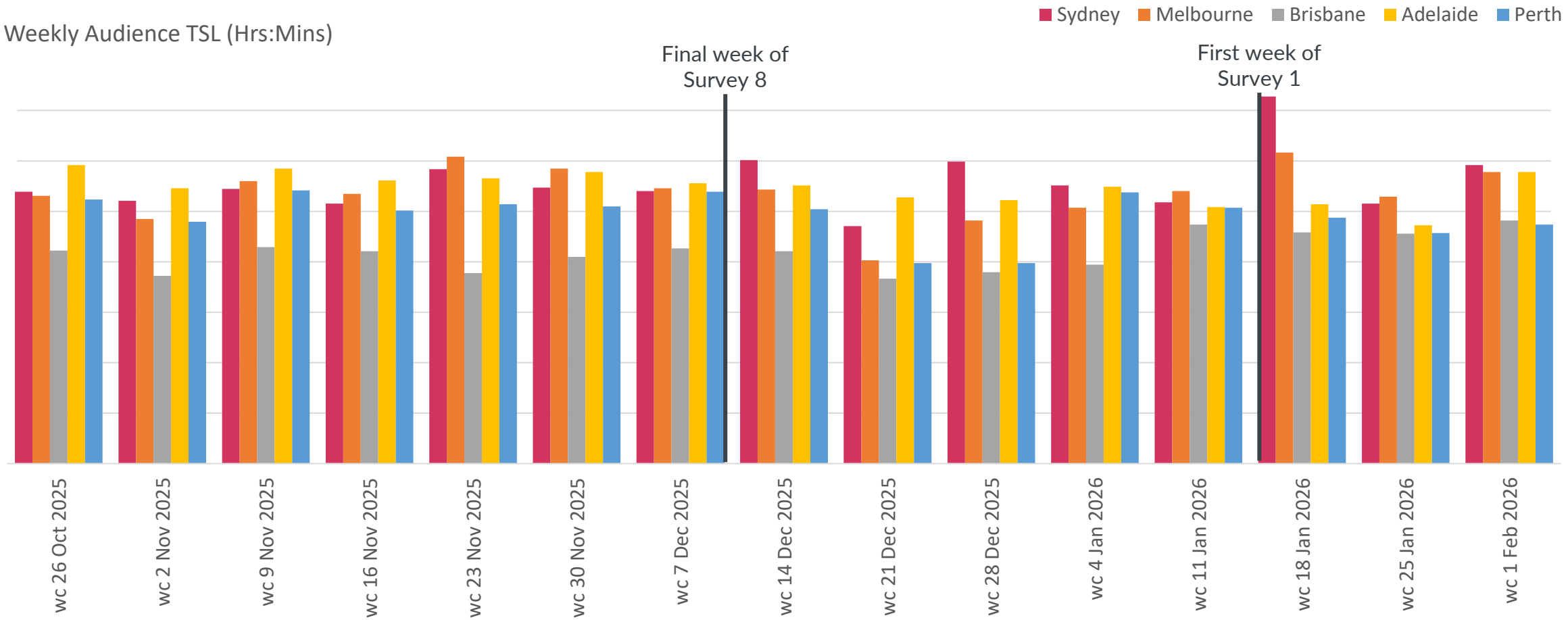


Source: GfK MediaWatch Panel, SMBAP, P10+, Mon-Sun 12mn to 12mn, Weekly TSL, listening for 1min or more within defined period.

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Weekly Summer Listening (TSL) – Total Radio By Market

Time spent listening drops over Xmas and New Years

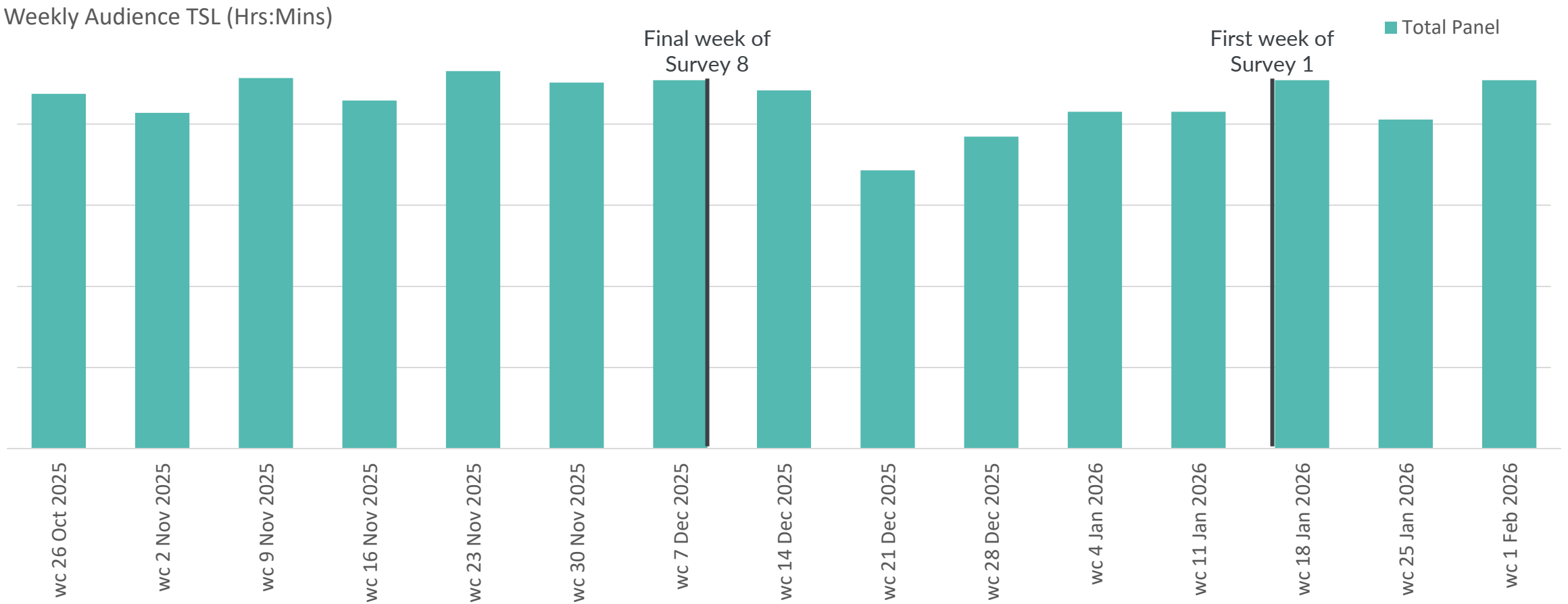


Source: GfK MediaWatch Panel, SMBAP, P10+, Mon-Sun 12mn to 12mn, Weekly TSL, listening for 1min or more within defined period.

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Weekly Summer Listening (TSL) – Commercial Radio - SMBAP

Time spent listening drops around an hour during week of Xmas

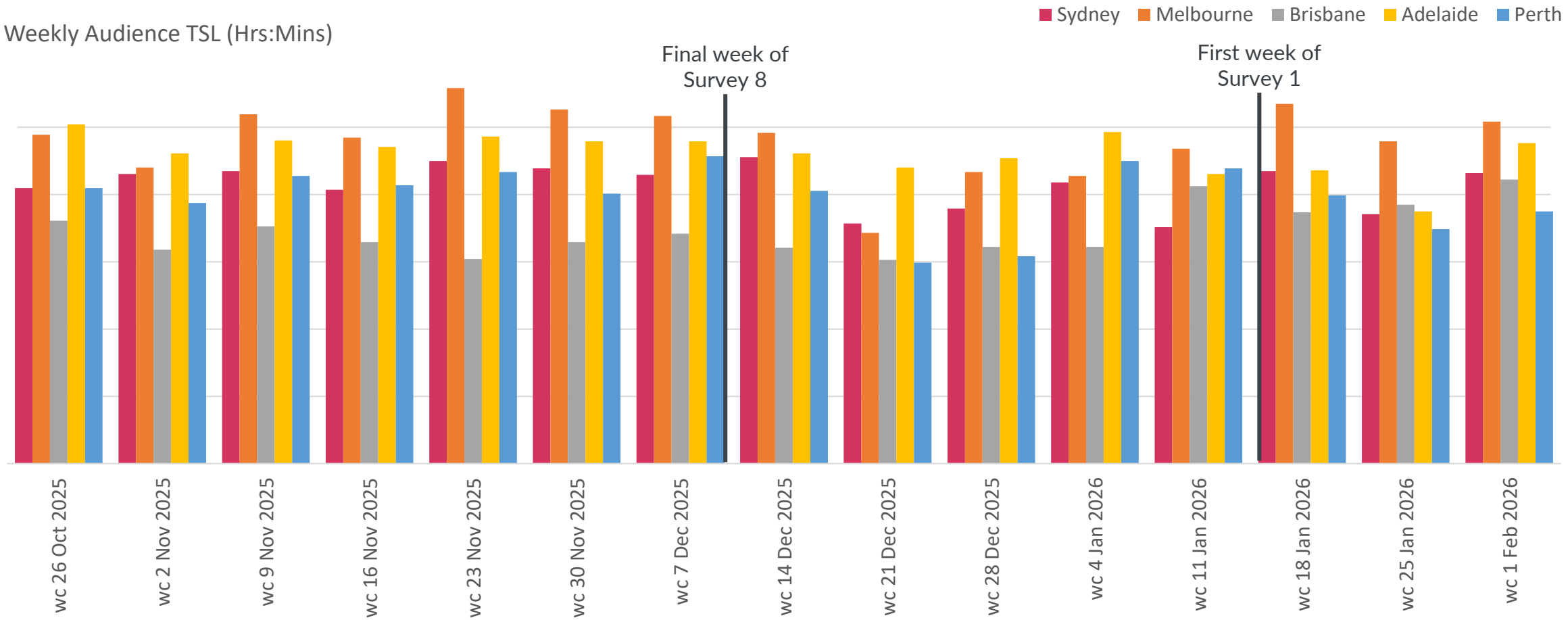


Source: GfK MediaWatch Panel, SMBAP, P10+, Mon-Sun 12mn to 12mn, Weekly TSL, listening for 1min or more within defined period.

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Weekly Summer Listening (TSL) – Commercial Radio by market

Time spent listening drops over Xmas and New Years

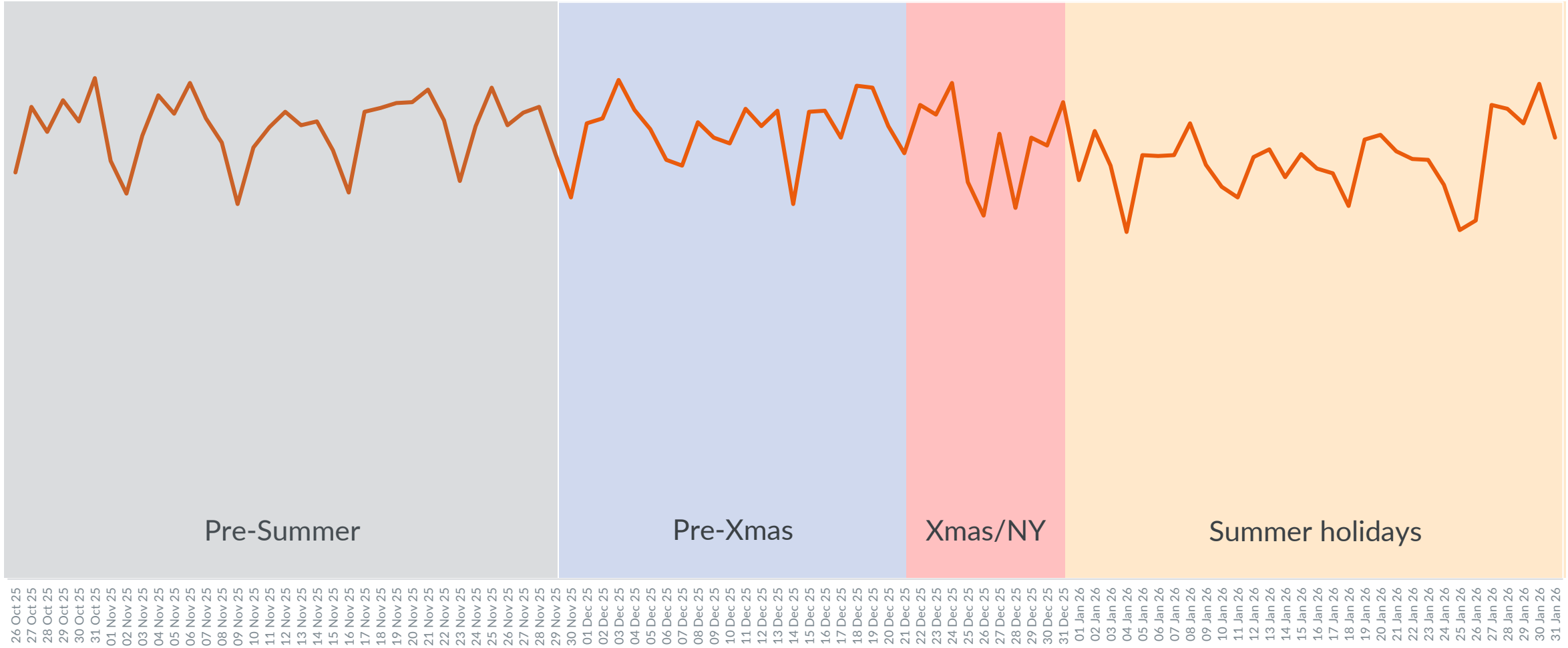


Source: GfK MediaWatch Panel, SMBAP, P10+, Mon-Sun 12mn to 12mn, Weekly TSL, listening for 1min or more within defined period.

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Commercial Radio Daily Reach

Reach remains strong across the summer listening period

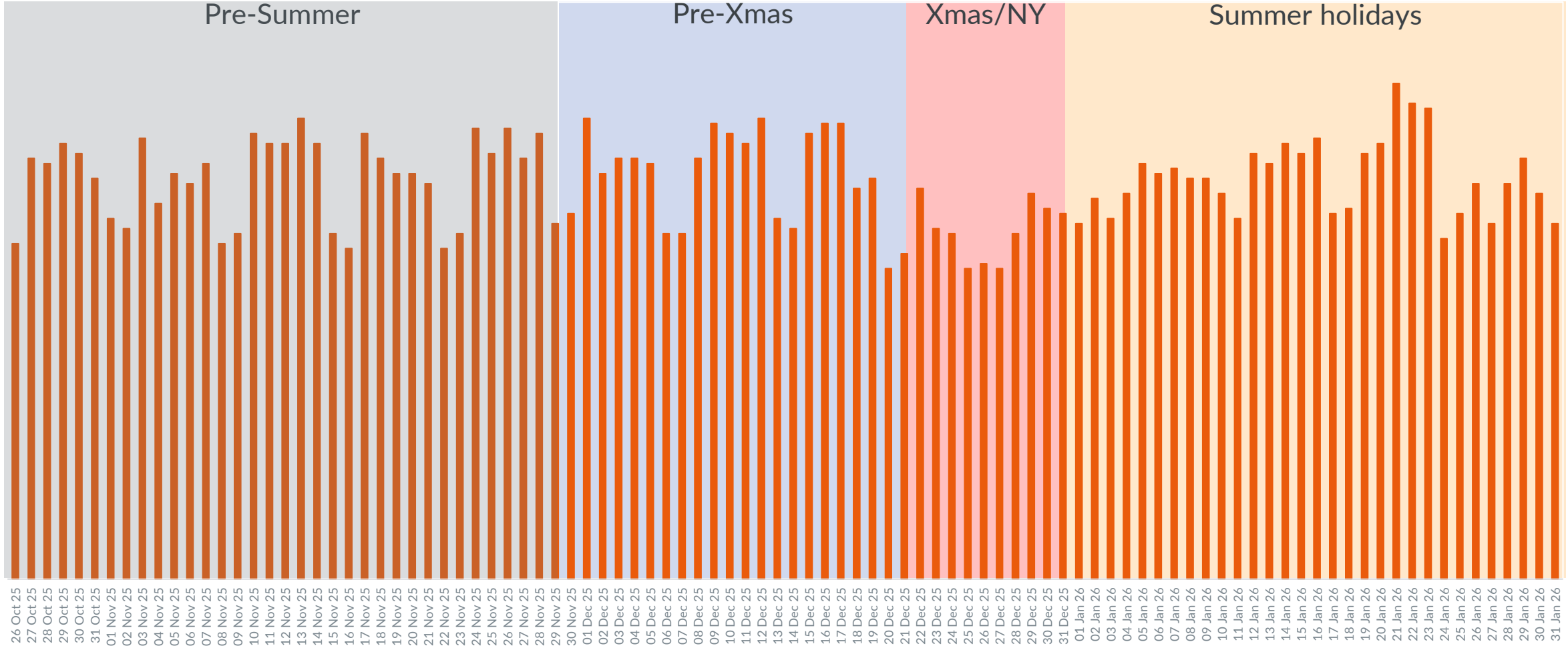


Source: GfK MediaWatch Panel, SMBAP, P10+, Mon–Sun 12mn-12mn, Daily reach %, listening for 1min or more within defined period. Pre-Summer (26 Oct – 29 Nov 25), Pre-Xmas (30 Nov - 23 Dec 25), Xmas/NY (24 Dec 25 - 1 Jan 26), Summer holidays (2 Jan - 31 Jan 26)

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Commercial Radio Daily TSL

TSL strong across most of Summer, with declines over the Xmas/NY period



Source: GfK MediaWatch Panel, SMBAP, P10+, Mon-Sun 12mn-12mn, Daily TSL, listening for 1min or more within defined period. Pre-Summer (26 Oct – 29 Nov 25), Pre-Xmas (30 Nov - 23 Dec 25), Xmas/NY (24 Dec 25 - 1 Jan 26), Summer holidays (2 Jan - 31 Jan 26)

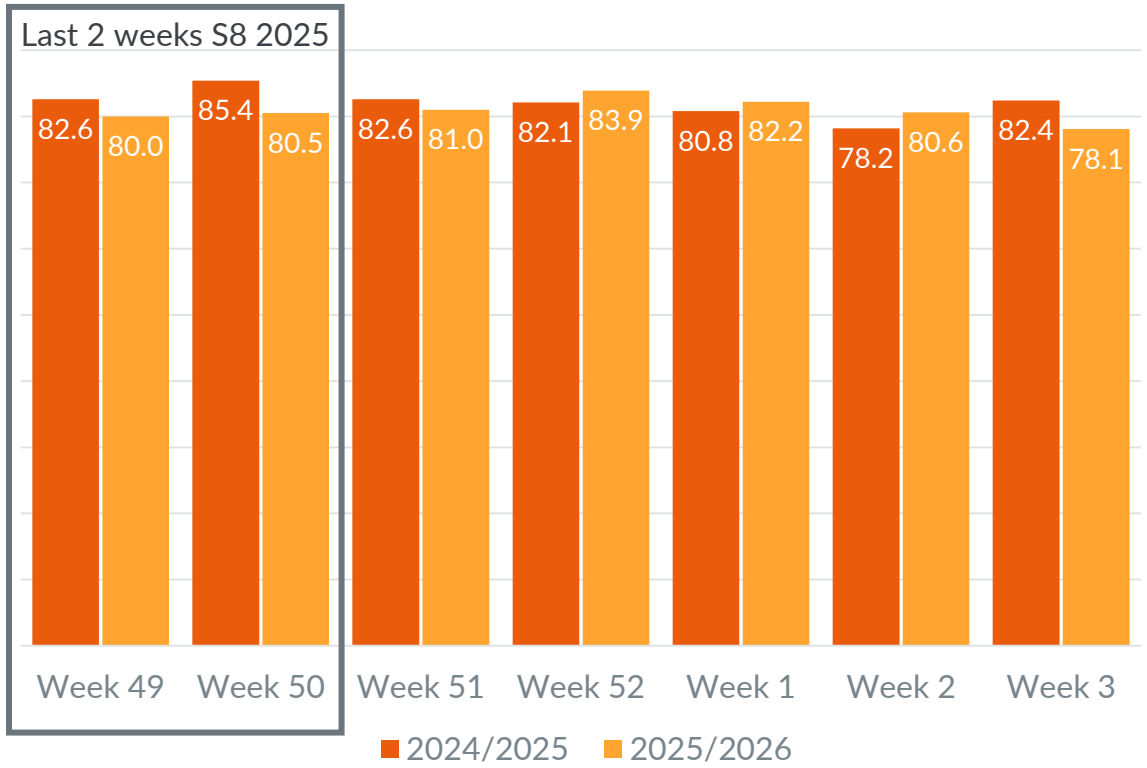
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Audience Retention

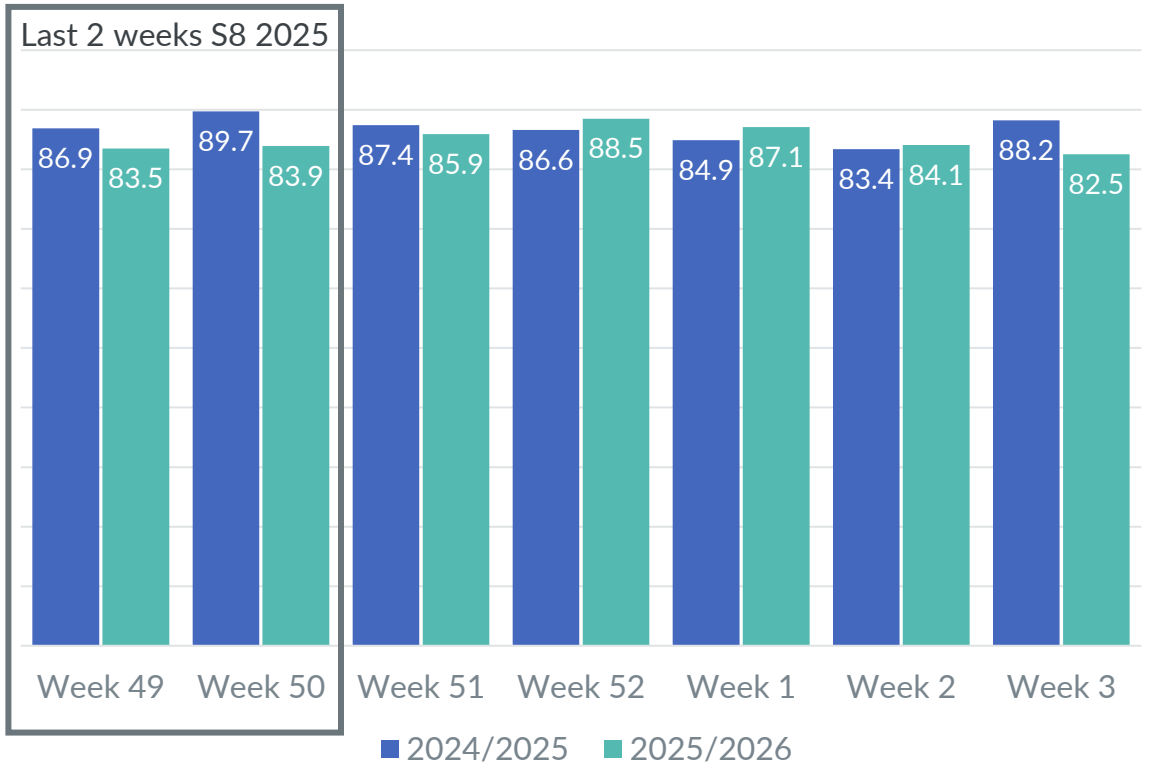
% of November radio listeners who continue to listen to radio in December & January

2025/2026 had slightly higher audience retention in late December / early January compared to 2024/2025

Commercial Radio Listeners



Total Radio Listeners



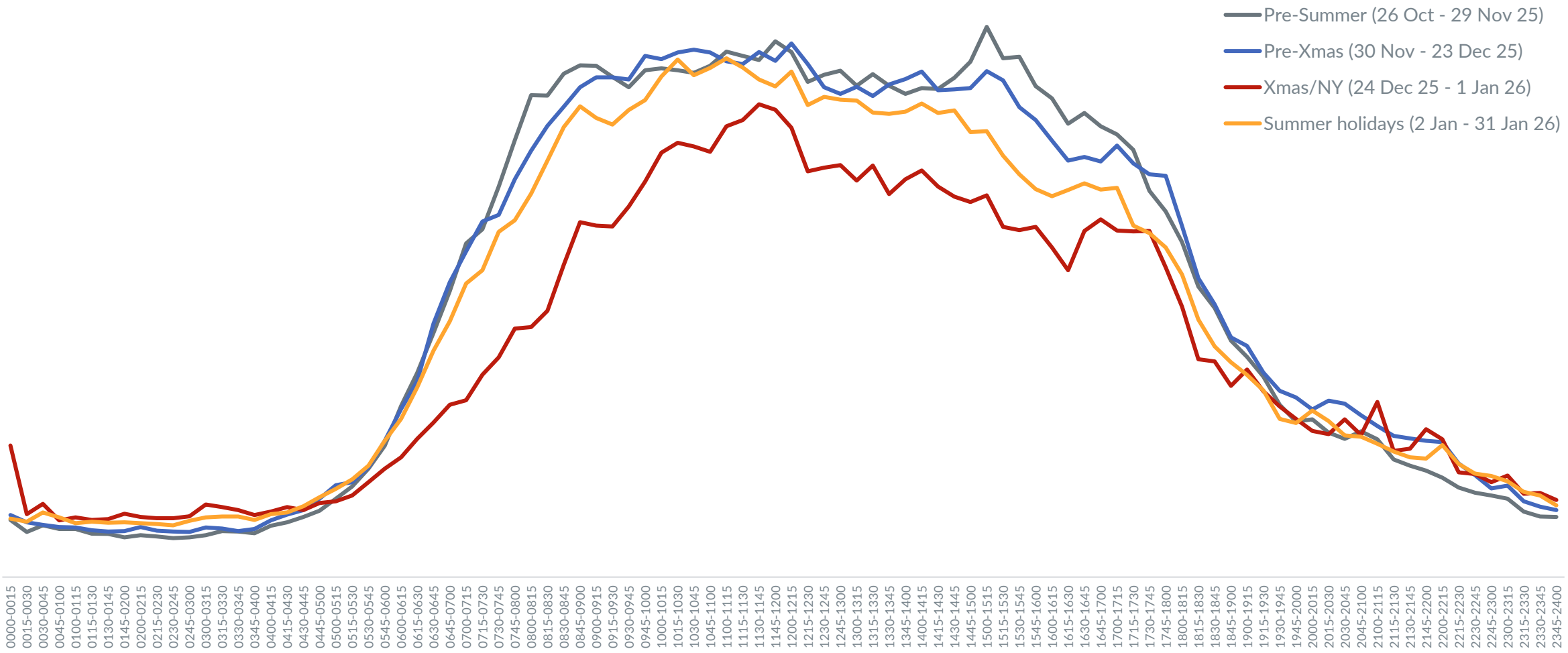
*Note: in 2024 survey 8 finished 30/11/24 (week 48) and in 2025 survey 8 finished 13/12/25 (week 50). Week 3 is the last non-survey week over summer

Source: GfK MediaWatch, SMBAP, P10+, Mon-Sun 12mn-12mn, 2024/2025: Radio Listeners from 27/10/24 – 30/11/24, 2025/2026: Radio listeners from 26/10/25 – 29/11/25
Week 49: 1 Dec - 7 Dec 2024 / 30 Nov - 6 Dec 2025, Week 50: 8 Dec - 14 Dec 2024 / 7 Dec - 13 Dec 2025, Week 51: 15 Dec - 21 Dec 2024 / 14 Dec - 20 Dec 2025, Week 52: 22 Dec - 28 Dec 2024 / 21 Dec - 27 Dec 2025, Week 1: 29 Dec 2024 - 4 Jan 2025 / 28 Dec 2025 - 3 Jan 2026, Week 2: 5 Jan - 11 Jan 2025 / 4 Jan - 10 Jan 2026, Week 3: 12 Jan - 18 Jan 2025 / 11 Jan - 17 Jan 2026

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Commercial Radio – Reach shape of day - People 10+

Listener habits vary across the summer period

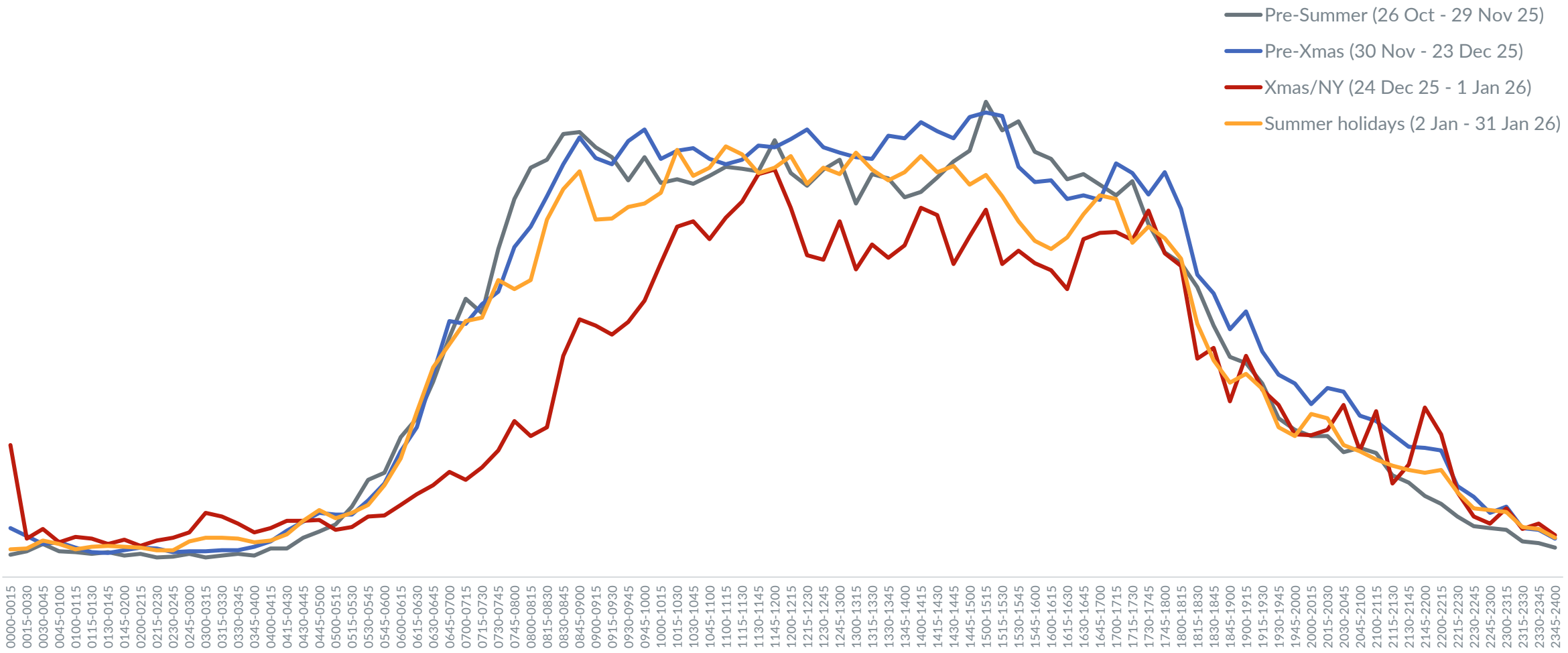


Source: GfK MediaWatch Panel, SMBAP, P10+, Mon-Sun, Weekly reach, listening for 1min or more within defined period. Pre-Xmas (30 Nov - 23 Dec 25), Xmas/NY (24 Dec 25 - 1 Jan 26), Summer holidays (2 Jan - 31 Jan 26)

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Commercial Radio – Reach shape of day - People 25-54

Listener habits vary across the summer period

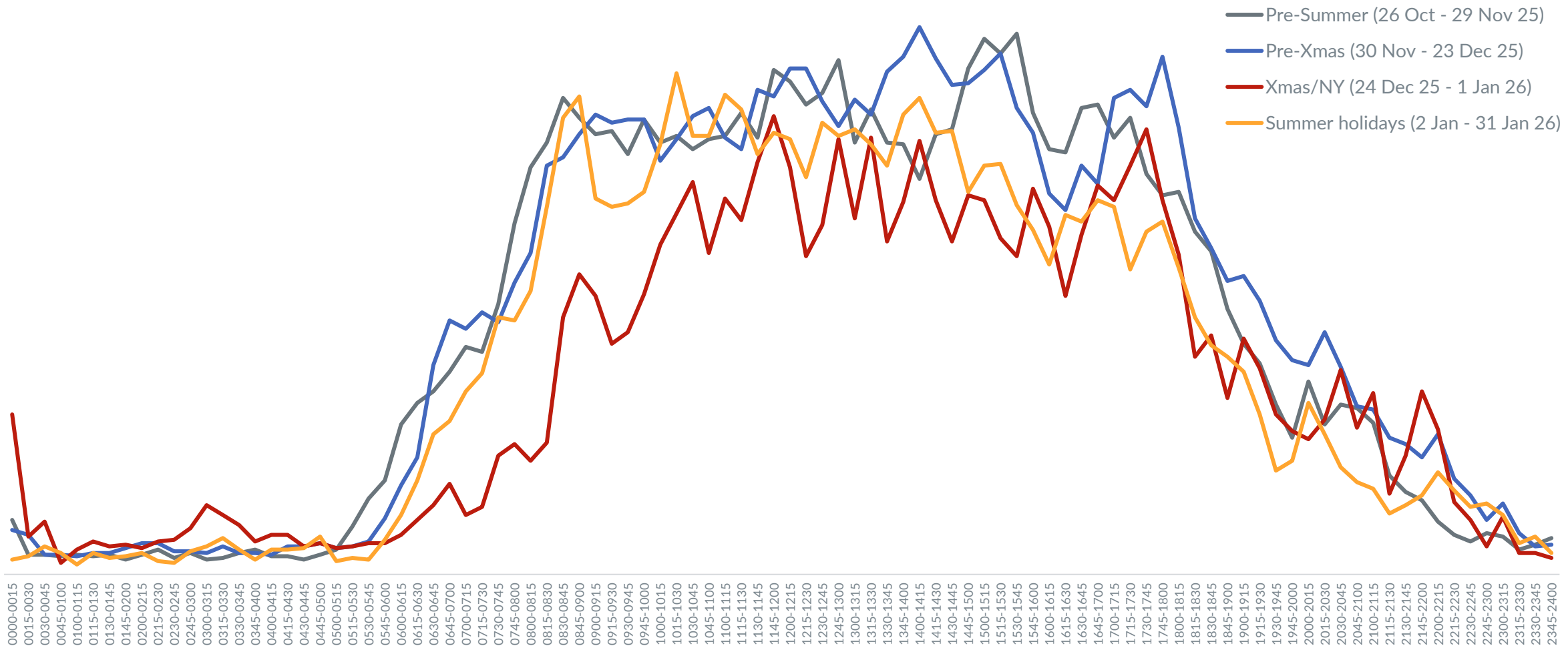


Source: GfK MediaWatch Panel, SMBAP, P10+, Mon-Sun, Weekly Reach, listening for 1min or more within defined period. Pre-Xmas (30 Nov - 23 Dec 25), Xmas/NY (24 Dec 25 - 1 Jan 26), Summer holidays (2 Jan - 31 Jan 26)

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Commercial Radio – Reach shape of day - People 10-39

Listener habits vary across the summer period

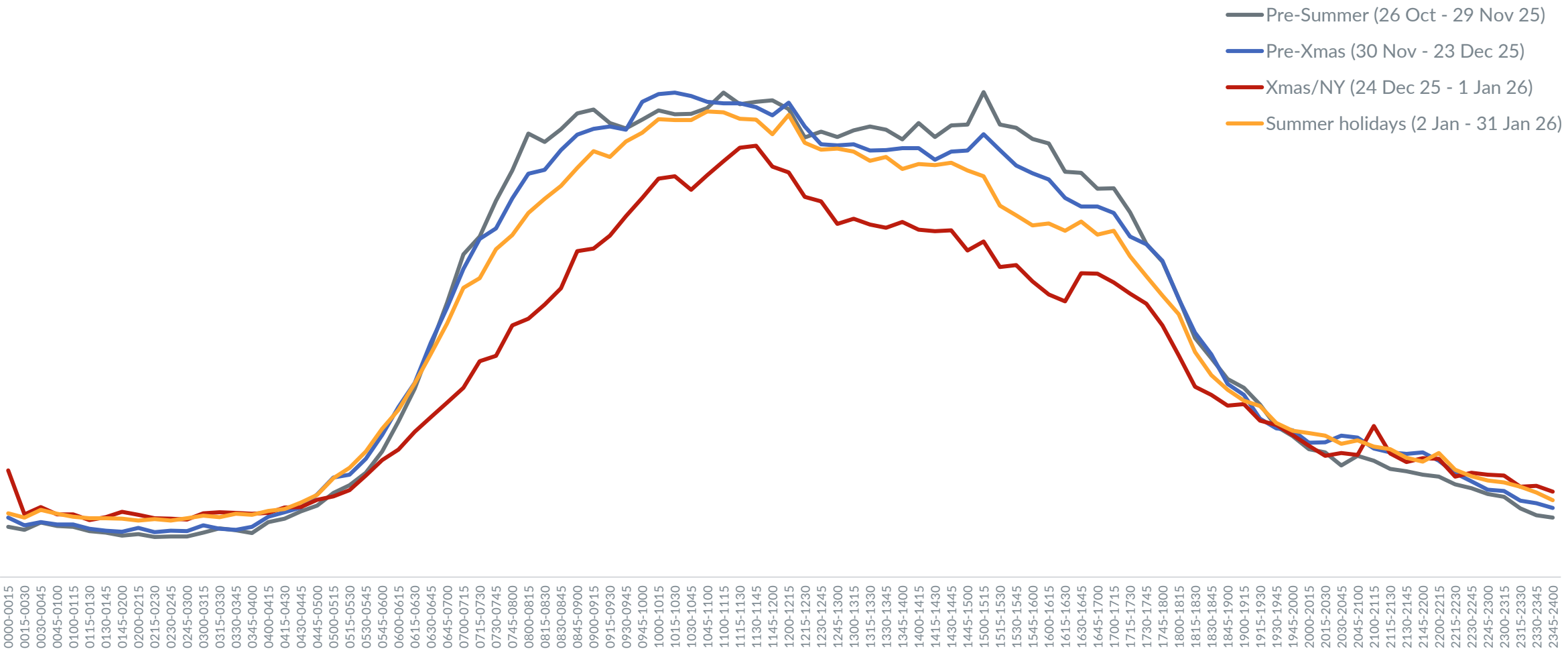


Source: GfK MediaWatch Panel, SMBAP, P10-39, Mon-Sun, Weekly reach, listening for 1min or more within defined period. Pre-Summer (26 Oct – 29 Nov 25), Pre-Xmas (30 Nov - 23 Dec 25), Xmas/NY (24 Dec 25 - 1 Jan 26), Summer holidays (2 Jan - 31 Jan 26)

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Commercial Radio – Reach shape of day - People 40+

Listener habits vary across the summer period

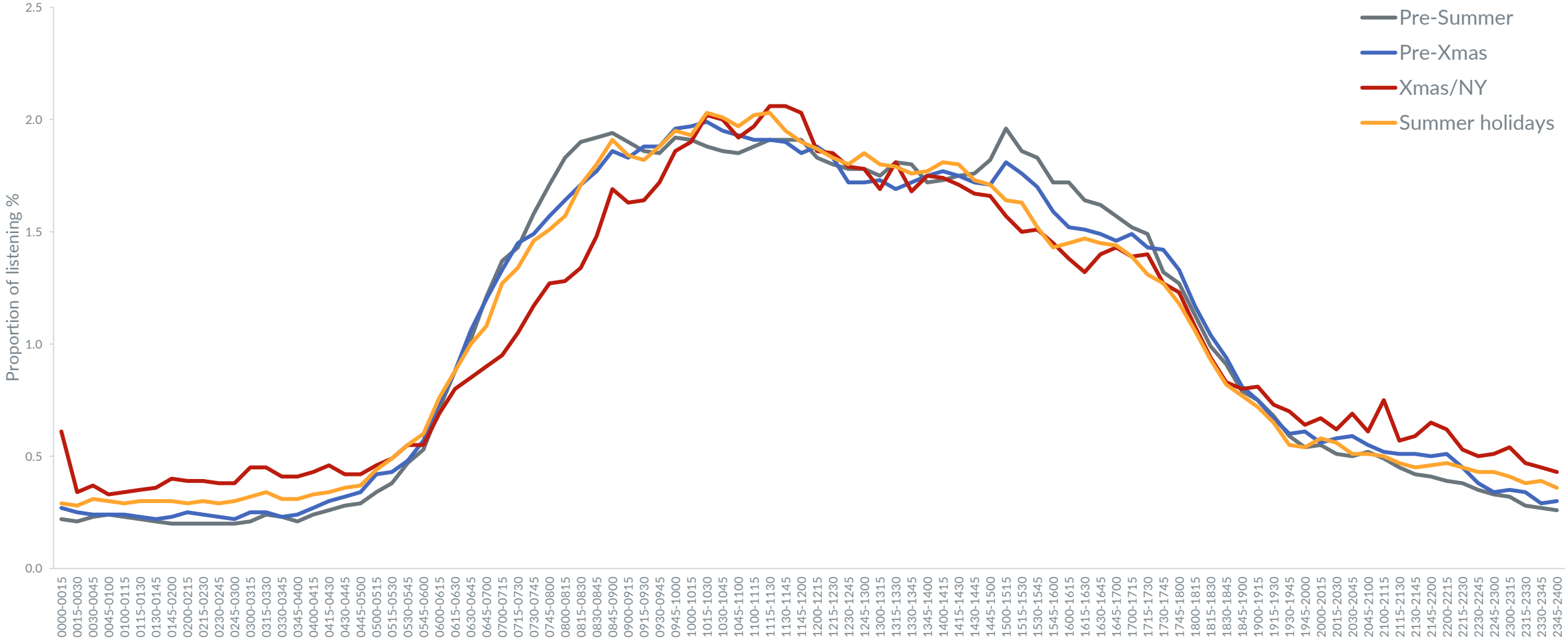


Source: GfK MediaWatch Panel, SMBAP, P40+, Mon-Sun, Weekly reach, listening for 1min or more within defined period. Pre-Summer (26 Oct – 29 Nov 25), Pre-Xmas (30 Nov - 23 Dec 25), Xmas/NY (24 Dec 25 - 1 Jan 26), Summer holidays (2 Jan - 31 Jan 26)

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Commercial Radio - Proportion of listening – People 10+

Compared to pre-summer & pre-Xmas, P10+ have a lower proportion of listening from 3-6pm & higher proportion of listening in mid-dawns during Xmas/NY & summer holidays

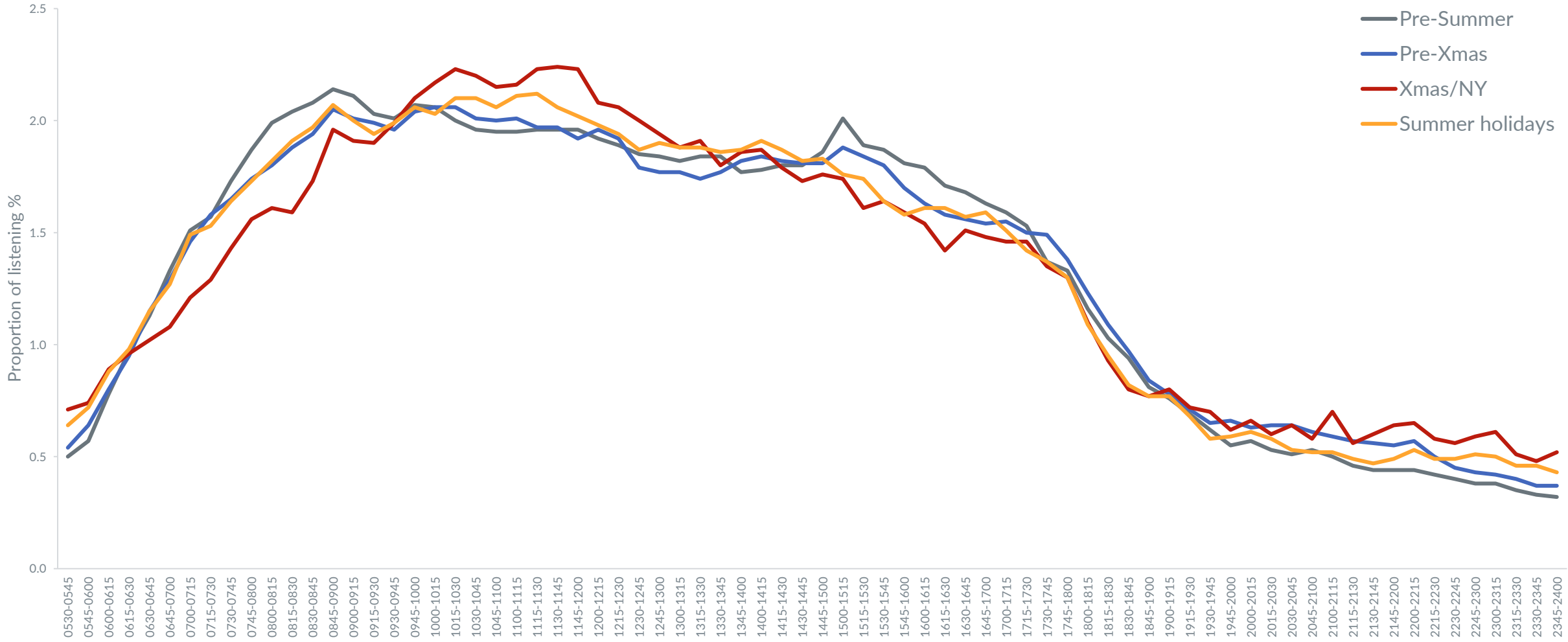


Source: GfK MediaWatch Panel, SMBAP, P10+, Mon-Sun, listening for 1min or more within defined period. Pre-Summer (26 Oct – 29 Nov 25), Pre-Xmas (30 Nov - 23 Dec 25), Xmas/NY (24 Dec 25 - 1 Jan 26), Summer holidays (2 Jan - 31 Jan 26). Proportion of listening - The percentage of listening (volume) a daypart has of the total commercial radio listening Mon-Sun 5:30am-12mn. E.g. In Summer holidays, the qtr hr from 12pm-12:15 accounts for 1.9% of all commercial radio listening Mon-Sun 5:30am-12mn, P10+

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Total Radio – People 10+

Compared to pre-summer & pre-Xmas, P10+ have a higher proportion of radio listening from 10am-2pm during Xmas/NY & summer holidays

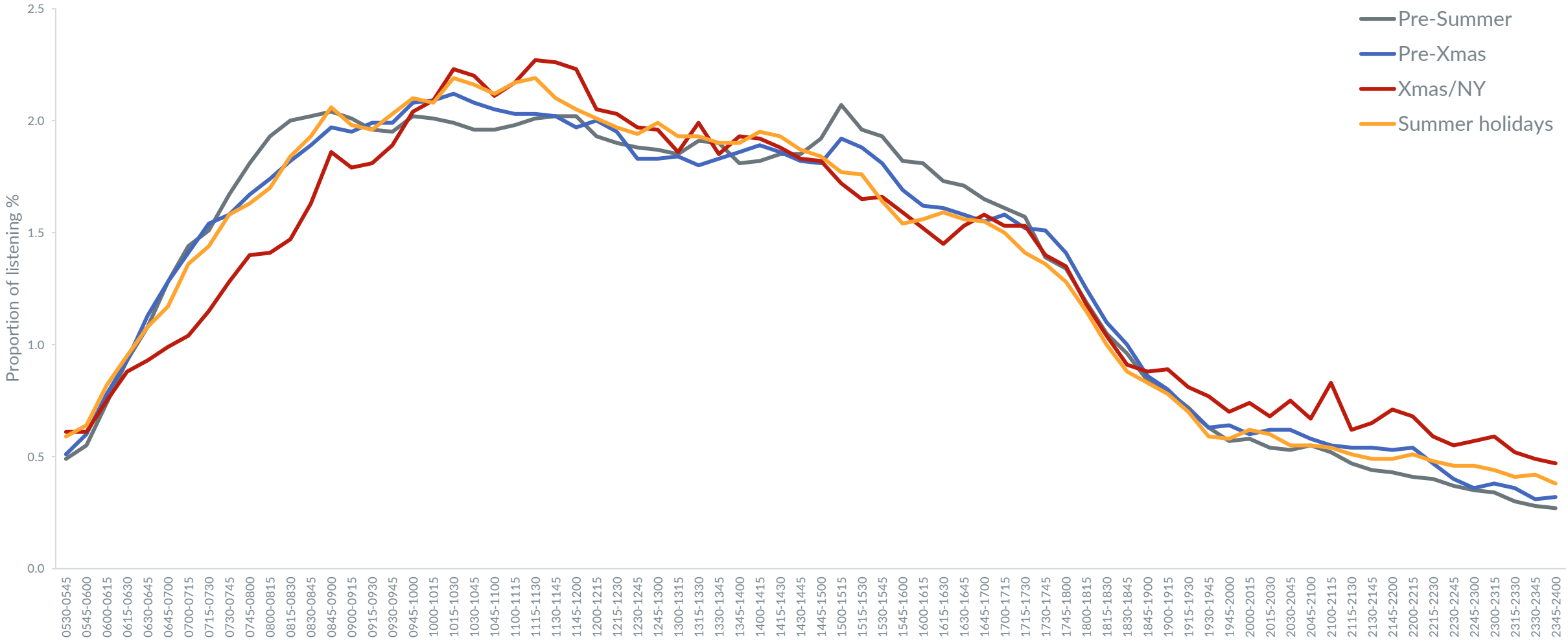


Source: GfK MediaWatch Panel, SMBAP, P10+, Mon-Sun 5:30am-12mn, listening for 1min or more within defined period. Pre-Summer (27 Oct – 30 Nov 24), Pre-Xmas (01 Dec - 22 Dec 23), Xmas/NY (23 Dec 24 - 1 Jan 25), Summer holidays (2 Jan - 31 Jan 25). Proportion of listening - The percentage of listening (volume) a daypart has of the total radio listening Mon-Sun 5:30am-12mn. E.g. In Summer holidays, the qtr hr from 12pm-12:15 accounts for 2.1% of all radio listening Mon-Sun 5:30am-12mn, P10+

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Commercial Radio – People 10+

Compared to pre-summer & pre-Xmas, P10+ have a higher proportion of commercial radio Listening from 10am-2pm during Xmas/NY & summer holidays

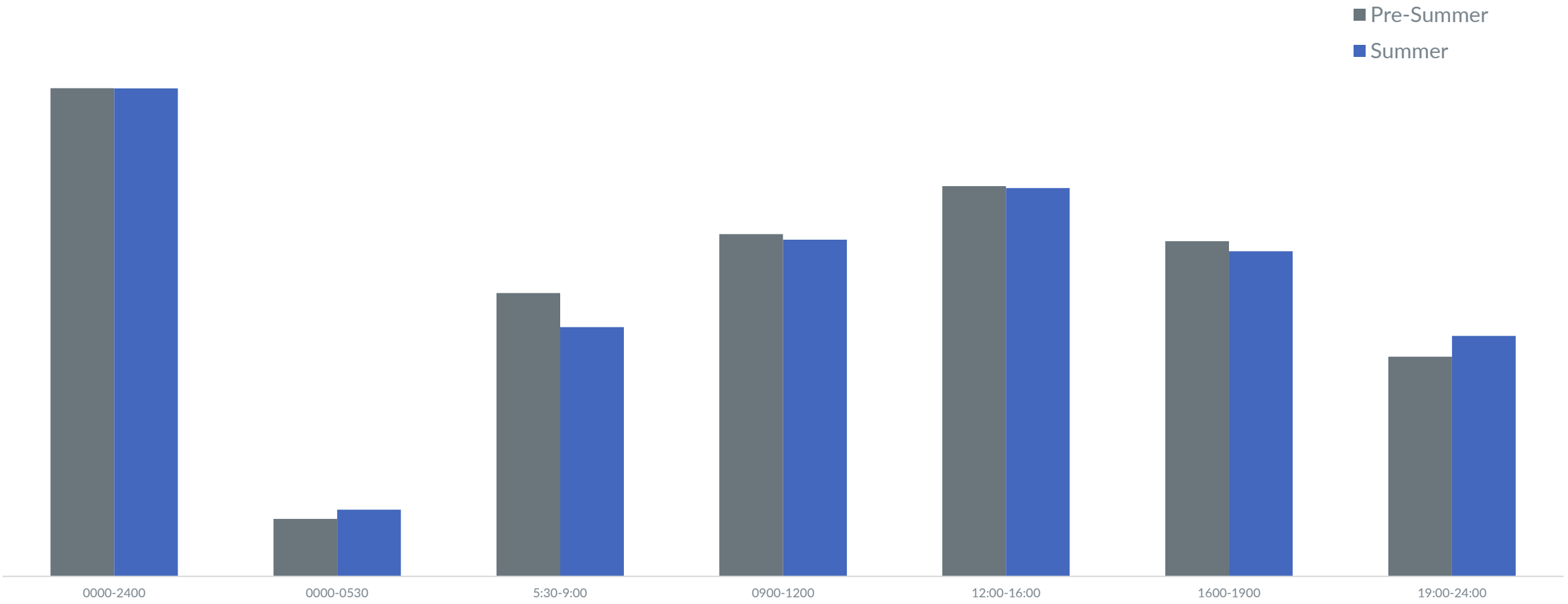


Source: GfK MediaWatch Panel, SMBAP, P10+, Mon-Sun 5:30am-12mn, listening for 1min or more within defined period. Pre-Summer (27 Oct – 30 Nov 24), Pre-Xmas (01 Dec - 22 Dec 23), Xmas/NY (23 Dec 24 - 1 Jan 25), Summer holidays (2 Jan - 31 Jan 25). Proportion of listening - The percentage of listening (volume) a daypart has of the total commercial radio listening Mon-Sun 5:30am-12mn. E.g. In Summer holidays, the qtr hr from 12pm-12:15 accounts for 2.2% of all commercial radio listening Mon-Sun 5:30am-12mn, P10+

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Commercial Radio – Weekly reach by daypart - People 10+

Weekly reach is stable over summer, with differences by daypart

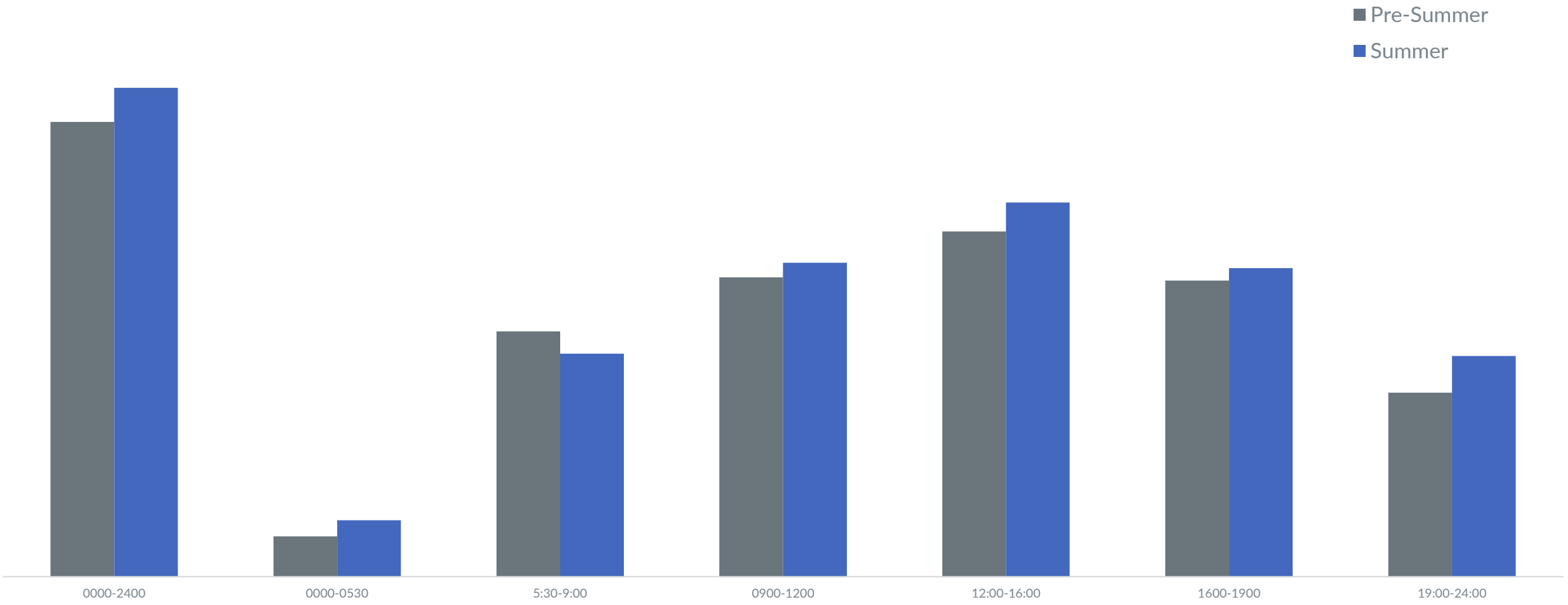


Source: GfK MediaWatch Panel, SMBAP, P10+, listening for 1min or more within defined period. Weekly Reach (Mon-Sun), Pre-Summer (26 Oct – 29 Nov 25), Summer (01 Dec 24 – 1 Feb 25)

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Commercial Radio – Weekly reach by daypart - People 25-54

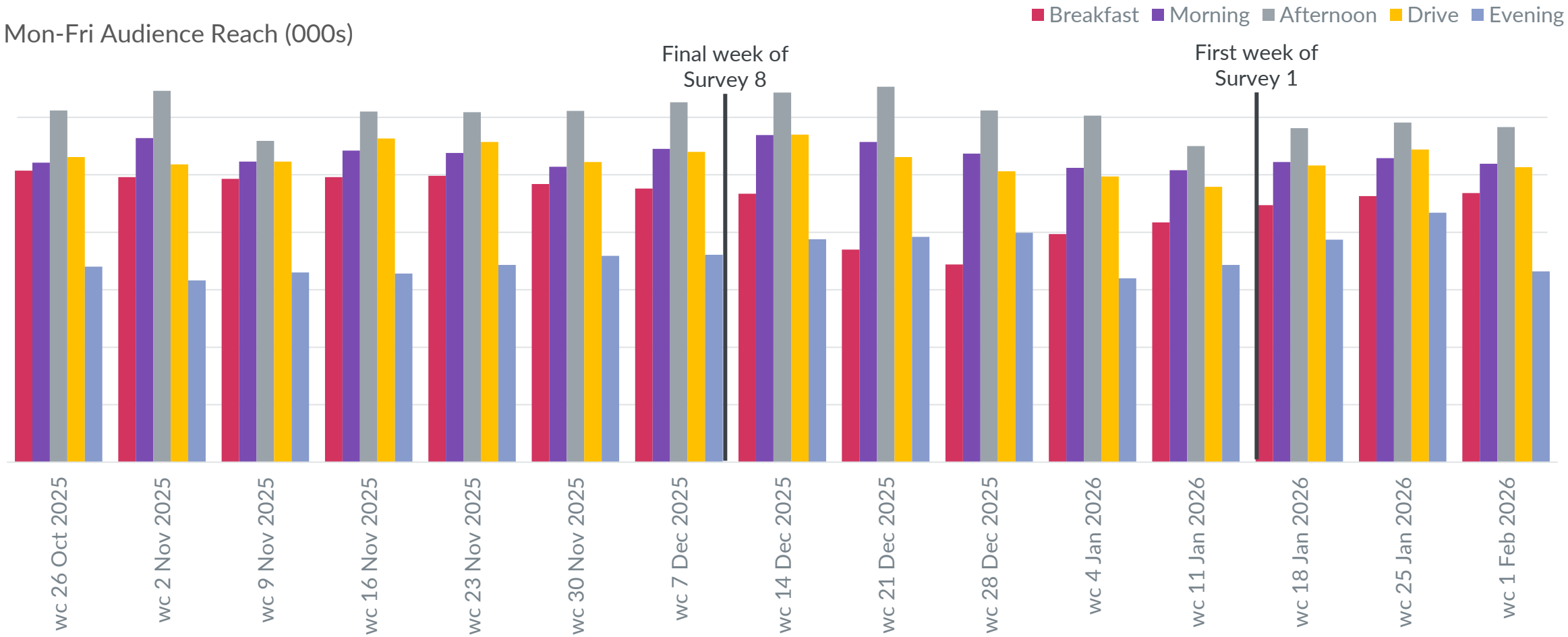
Weekly reach increases amongst P25-54 during summer, with a notable increase from 7pm-12mn



Source: GfK MediaWatch Panel, SMBAP, P25-54,listening for 1min or more within defined period. Weekly Reach (Mon-Sun), Pre-Summer (26 Oct – 29 Nov 25), Summer (01 Dec 24 – 1 Feb 25)

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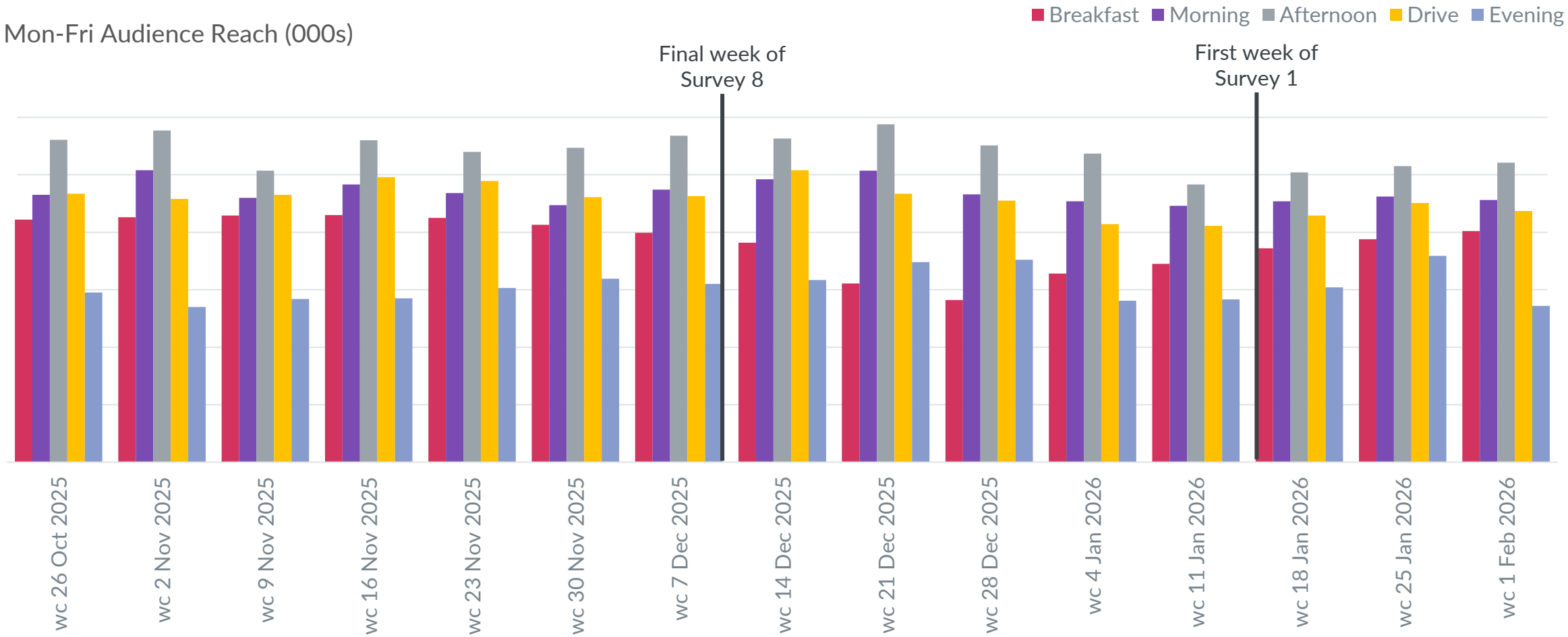
Weekly Summer Listeners – Total Radio – BMADE



Source: GfK MediaWatch Panel, SMBAP, P10+, Mon-Fri, B: 5:30-9am, M: 9am-12md, A: 12md-4pm, D: 4-7pm, E: 7pm-12mn, Weekly Reach (000s), listening for 1min or more within defined period.

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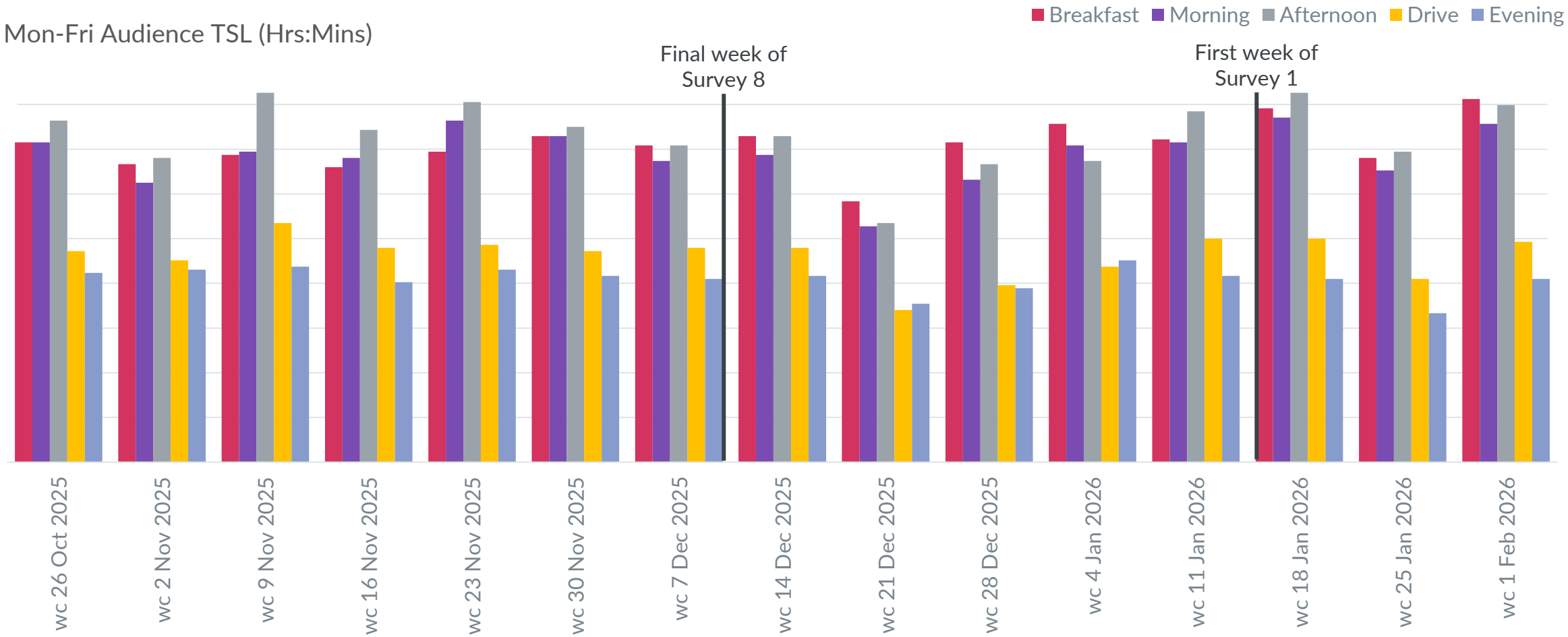
Weekly Summer Listeners – Commercial Radio – BMADE



Source: GfK MediaWatch Panel, SMBAP, P10+, Mon-Fri, B: 5:30-9am, M: 9am-12md, A: 12md-4pm, D: 4-7pm, E: 7pm-12mn, Weekly TSL, listening for 1min or more within defined period.

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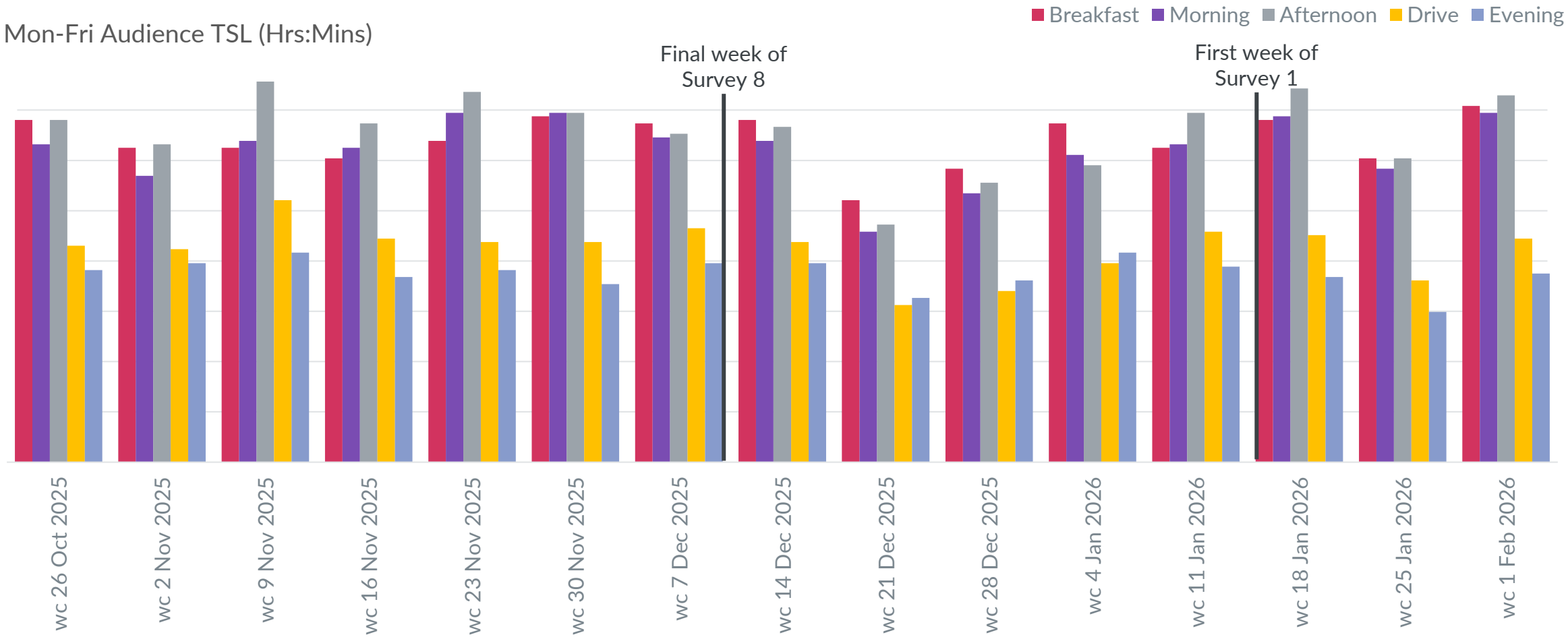
Weekly Summer Listening (TSL) – Total Radio – BMADE



Source: GfK MediaWatch Panel, SMBAP, P10+, Mon-Fri, B: 5:30-9am, M: 9am-12md, A: 12md-4pm, D: 4-7pm, E: 7pm-12mn, Weekly Reach (000s), listening for 1min or more within defined period.

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Weekly Summer Listening (TSL) – Commercial Radio – BMADE



Source: GfK MediaWatch Panel, SMBAP, P10+, Mon-Fri, B: 5:30-9am, M: 9am-12md, A: 12md-4pm, D: 4-7pm, E: 7pm-12mn, Weekly TSL, listening for 1min or more within defined period.

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