

RADIO CONNECTS Radio Re-discovered

March 2022

Who We Are

Radio Fast Facts

Radio's Reach

Streaming and Podcasting in Canada



WHO WE ARE

Radio Connects is the not-for-profit trade association for the Canadian Radio Industry. As the advocate for Canadian Radio, Radio Connects promotes and markets Radio advertising at the agency and client levels in English and French Canada



Starboard Communications Ltd.

RADIO CONNECTS IS SUPPORTED BY CANADIAN PRIVATE BROADCASTERS

Their financial support enables Radio Connects to invest in research and marketing initiatives that demonstrate the power of AM/FM Radio, its ability to drive business, validate ROI, and communicate Radio's role in the path to purchase to Canadian advertisers

CANADIAN AM/FM RADIO



3rd Largest Radio Market

According to WARC 2020 Global Report, Canada was 3rd to the U.S. and China but ahead of UK, France, Germany and Australia



1st in Share of Advertising Dollars

AM/FM Radio gets almost 9 cents per dollar of ad spend compared to between 5 -7 cents in France, UK, Germany, US and Australia



\$1.5B in Revenue

Advertisers spent over \$1.5 billion in Radio advertising to reach Canadian consumers

FAST FACTS

716

Commercial Radio Stations in Canada

119 AM | 597 FM
529 English | 97 French | 27
Ethnic

1.

85%

Amount of people 12+ Radio reaches in a week

AM/FM reaches 55% of 12+
Canadians each day

2.

8.35

Hours each week

Canadians 12+ spend listening
to AM/FM Radio.

3.

44%

Radio has largest share of all audio formats

From audio books to YouTube for
Music, AM/FM has the largest share of
time spent with all audio platforms

4.

75%

Available buyable impressions

When it comes to advertising audiences,
AM/FM Radio has the most impressions
available to reach Ad 2554

5.

54%

A1834 took action

After hearing an ad on the Radio, 54% of
1834's either went on line, told someone
about it, or purchased something being
advertised

6.

CANADIANS ARE TUNED IN TO AM/FM RADIO

Radio's Reach

Ad 18+ Top 5 Markets¹

17,517,810

Average Minute Audiences

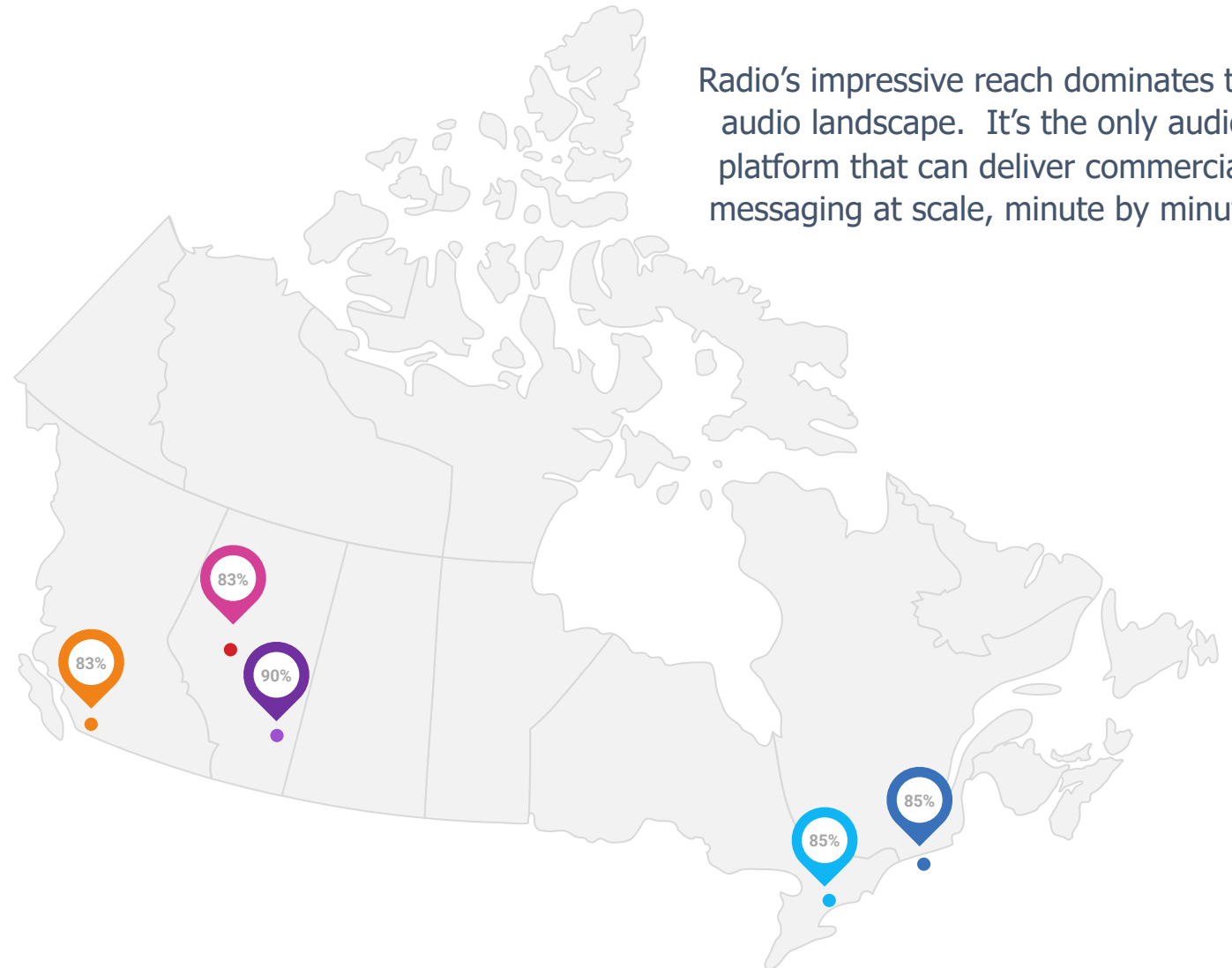
Ad 18+ Top 5 Markets¹

794,150

AM/FM's Share of Buyable Audio Ad18+²

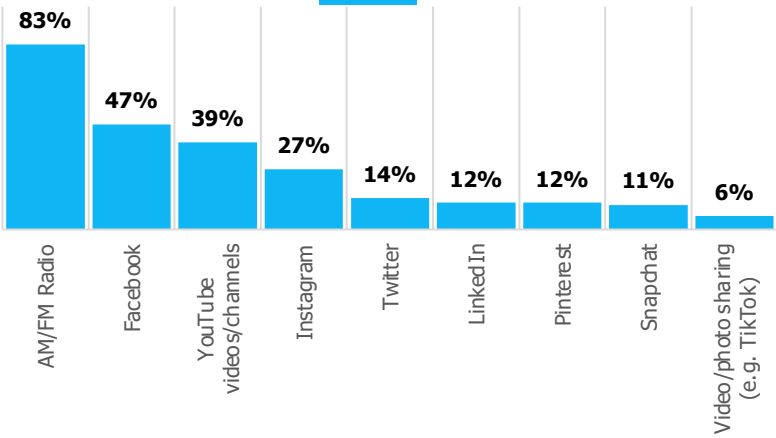
81%

Radio's impressive reach dominates the audio landscape. It's the only audio platform that can deliver commercial messaging at scale, minute by minute

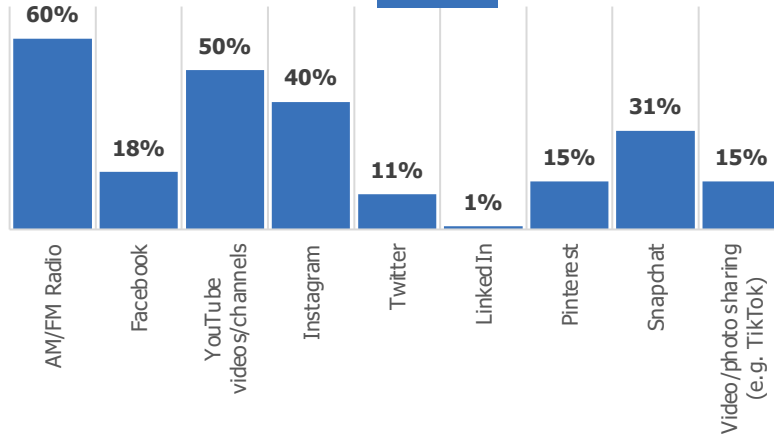


AM/FM RADIO CAN REACH MORE CANADIANS IN ONE WEEK THAN ANY SOCIAL PLATFORM, REGARDLESS OF AGE

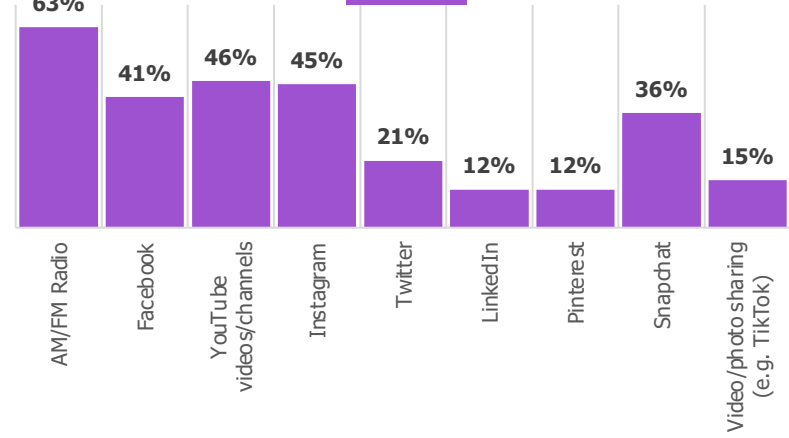
12+



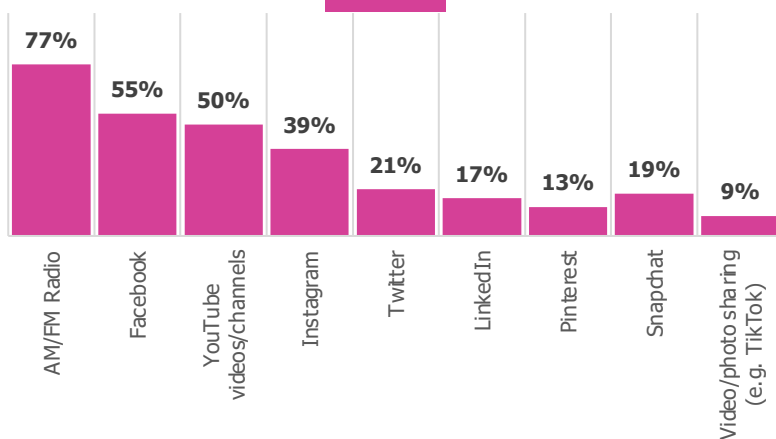
12-17



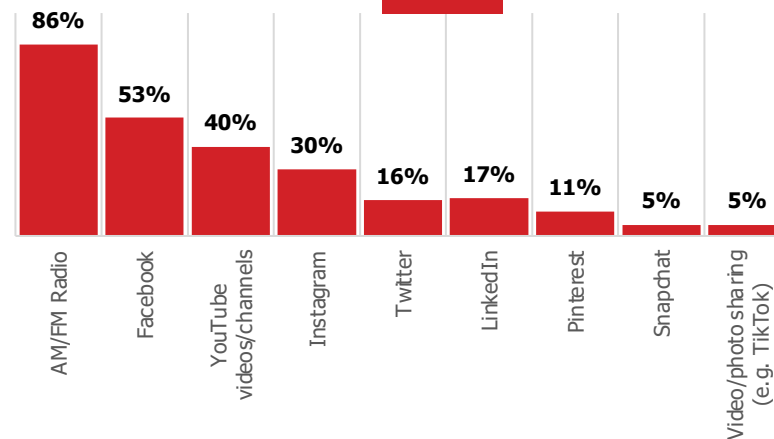
18-24



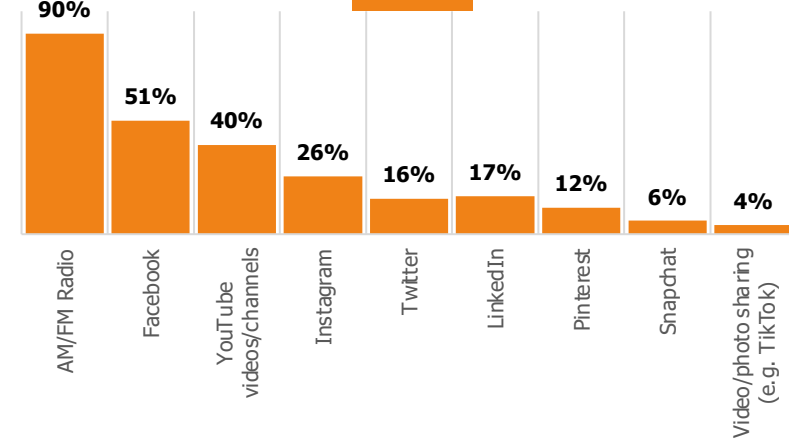
25-34



35-44



45-54



RADIO IS DIGITAL



Listeners have never had so much access

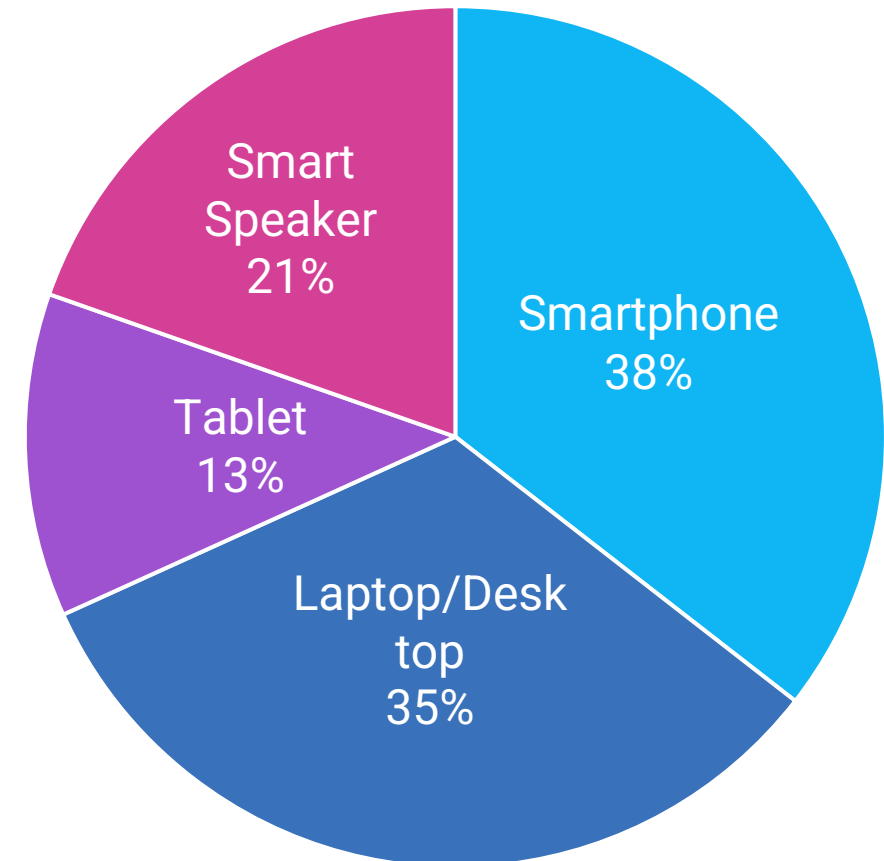


Streaming AM/FM Radio has grown in past year: +29% 18+ | +40% 1834



53% of 1834's streamed AM/FM Radio in the past week

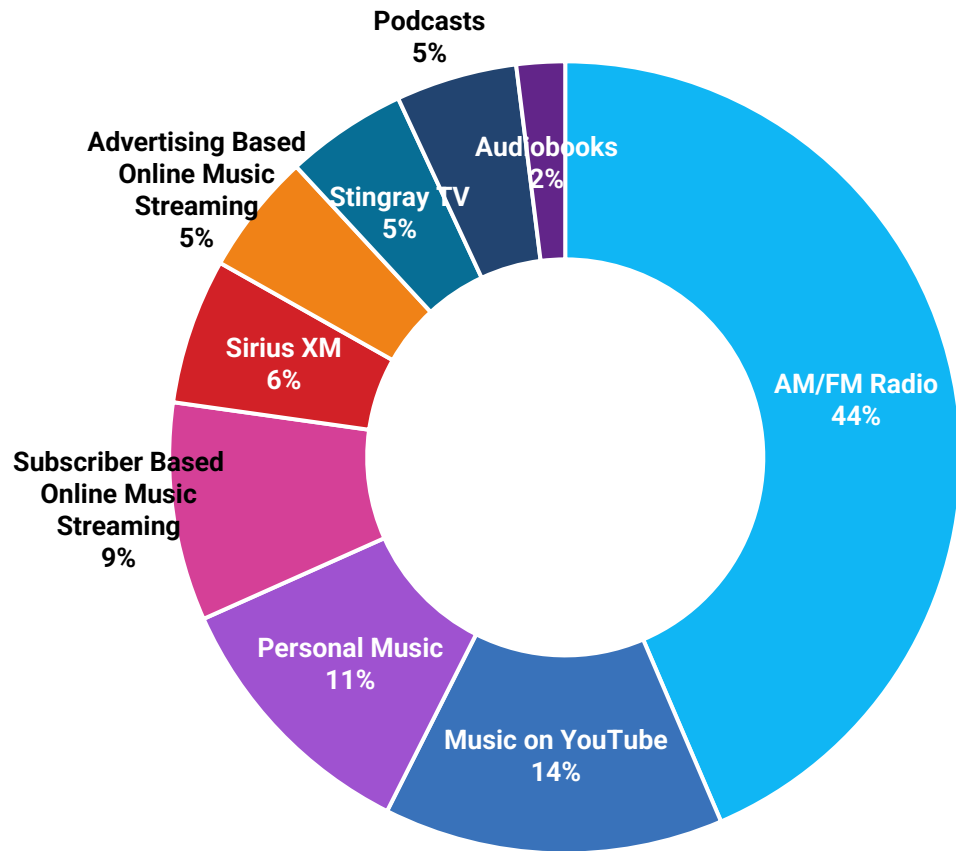
Devices used for listening to each media in the past week (by past week users)



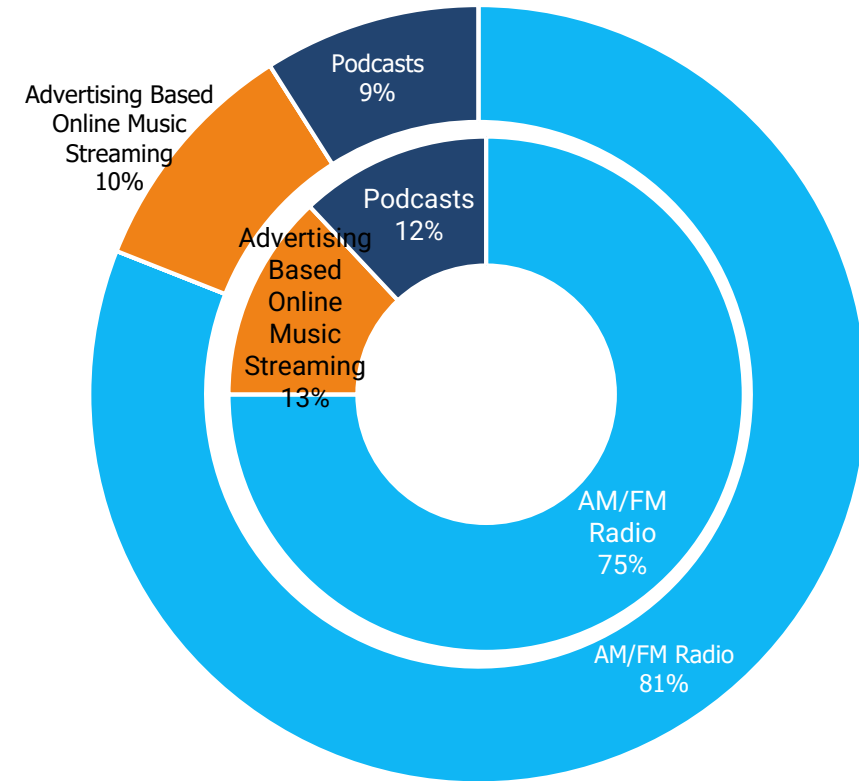
How to read: 35% of those who streamed AM/FM Radio in the past week used their laptop or desktop to do so. Boxes indicate most commonly used device for each media

WHEN IT COMES TO THE ABILITY TO REACH CONSUMERS ON AUDIO PLATFORMS, NOTHING OUTPERFORMS AM/FM RADIO

Share of Audio: **A18+ AM/FM Radio 44% #1**



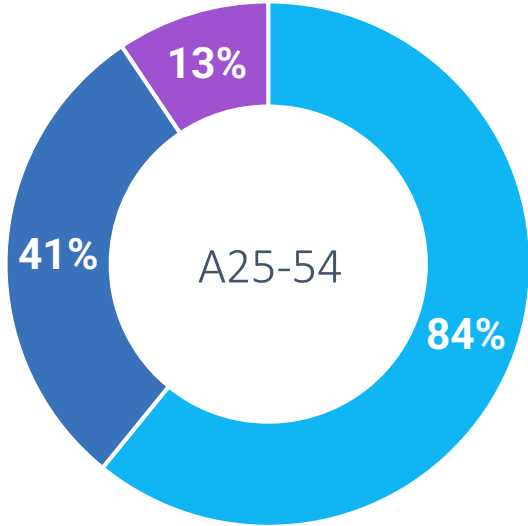
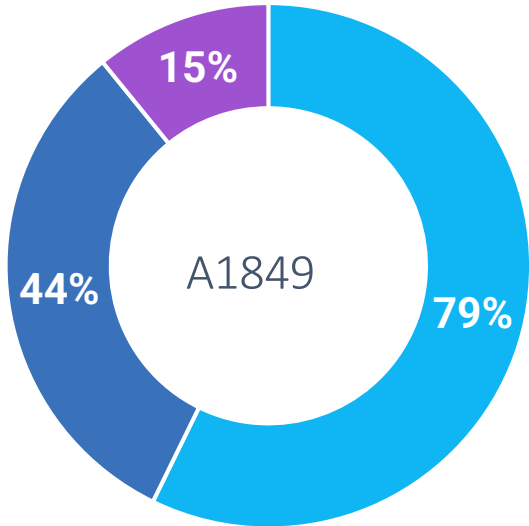
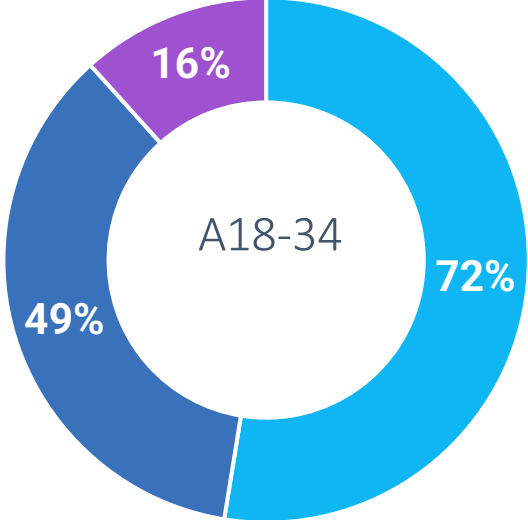
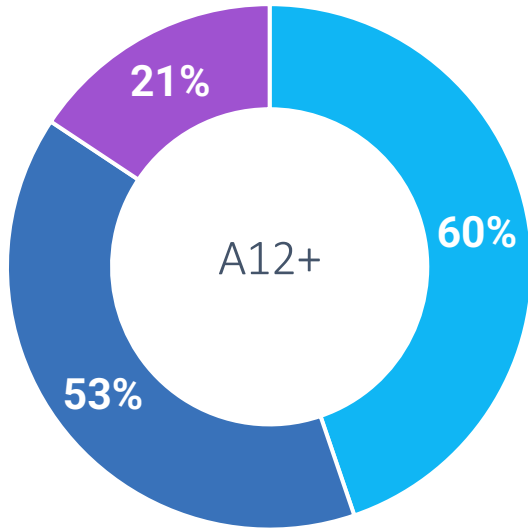
Share of Buyable* audio time spent **A18+81% AM/FM Radio #1 | A25-54 75% AM/FM Radio #1**



ACROSS ALL KEY ADVERTISING DEMOS, AM/FM RADIO REACHES MORE CONSUMERS THAN YOUTUBE FOR MUSIC OR AD SUPPORTED SPOTIFY



Radio reached over 6X more A25-54 in the past 7 days than ad supported Spotify



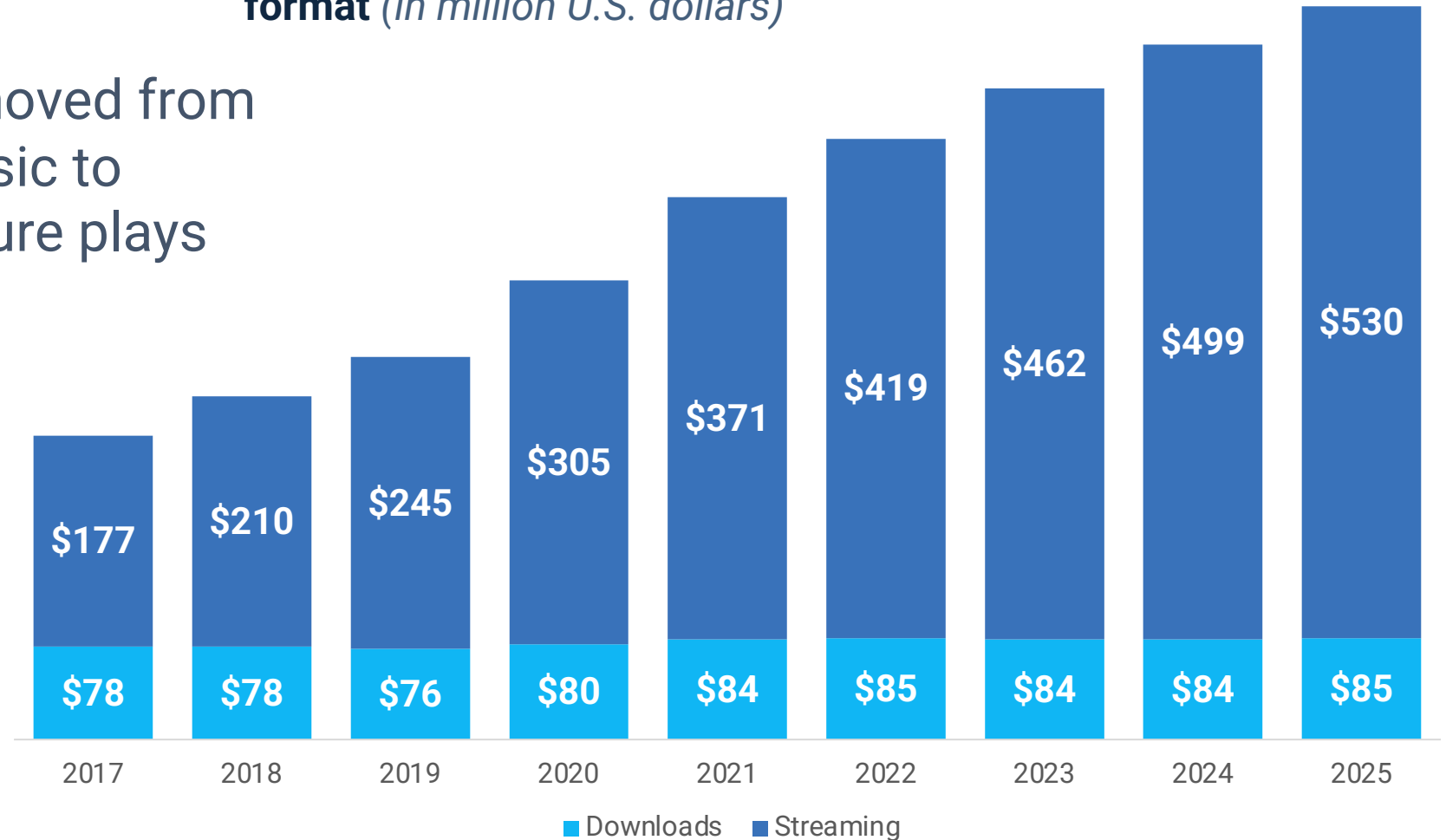
AM/FM Radio | YouTube for Music | Ad Supported Spotify

THE BUSINESS MODEL HAS CHANGED

Digital music revenue in Canada from 2017 to 2025, by format (in million U.S. dollars)



Canadians have moved from “owning” their music to “renting it” from pure plays like Spotify



SPOTIFY DOES NOT HAVE THE SCALE OF AM/FM RADIO



Despite what some marketers think, Spotify is not radio

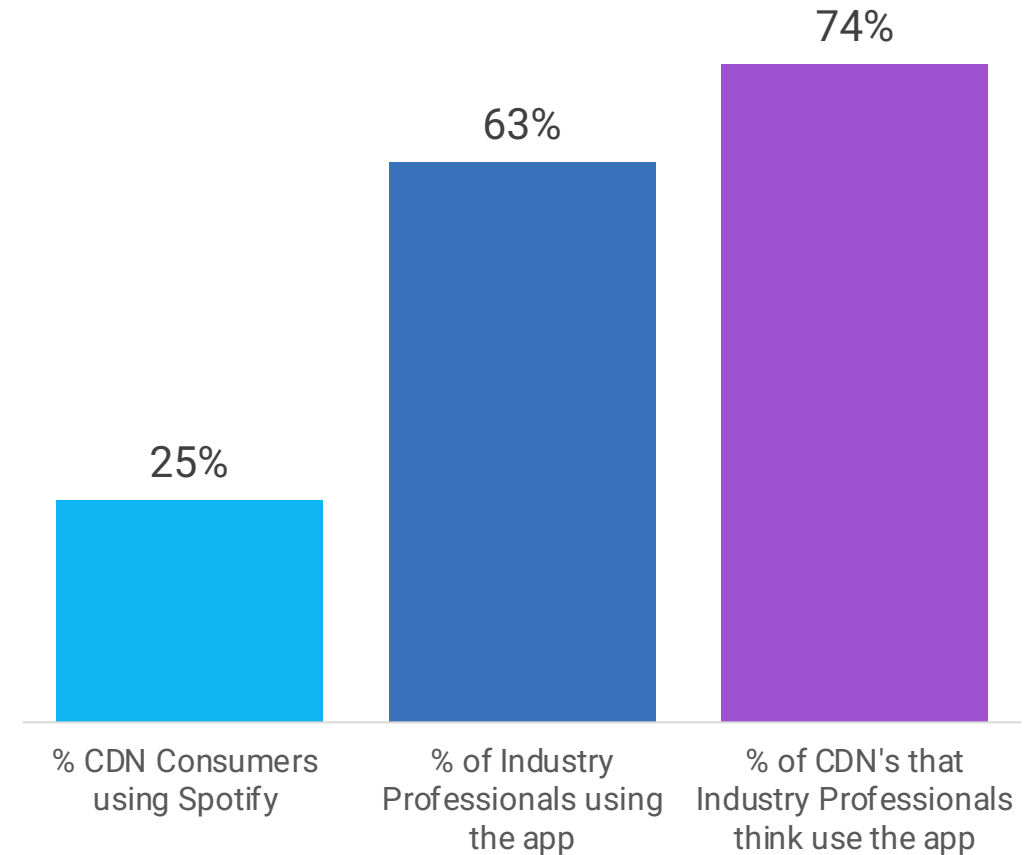


Growing % of Spotify daily users are using the ad-free service



Ads on pureplay music services do not command the same level attention of AM/FM Radio

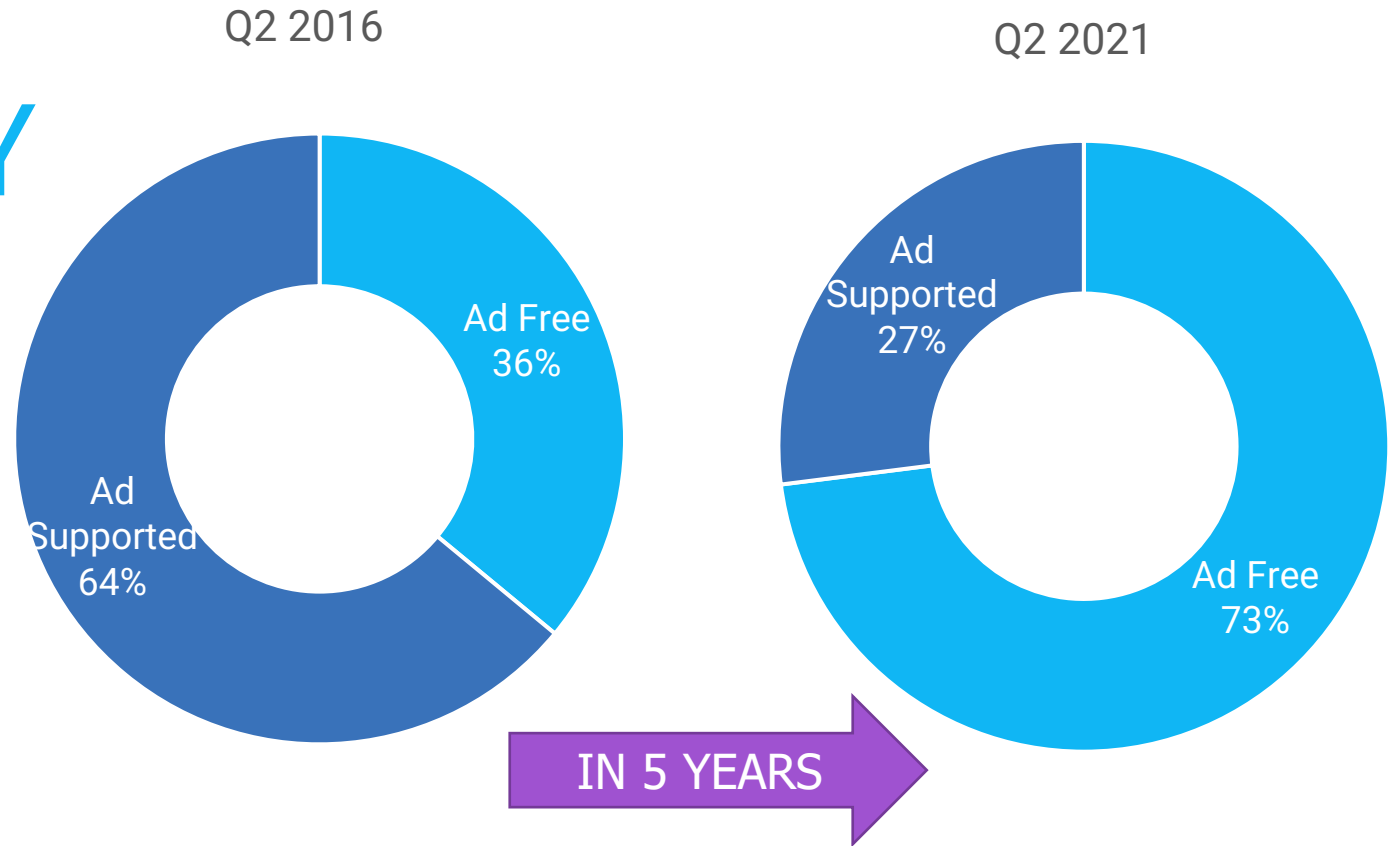
Those in advertising and marketing overestimated how many Canadians use the app on a monthly basis by 300%



A25-54 SHARE OF TIME SPENT WITH SPOTIFY BY SUBSCRIPTION TIER



73% of Spotify listeners are listening to the AD FREE subscription tier



PODCAST STATS



29% of Canadians

Canadians 18+ listen to podcasts on a monthly basis



Almost half (47%) of those who listen monthly are under 35

Age composition has held steady over the past three years

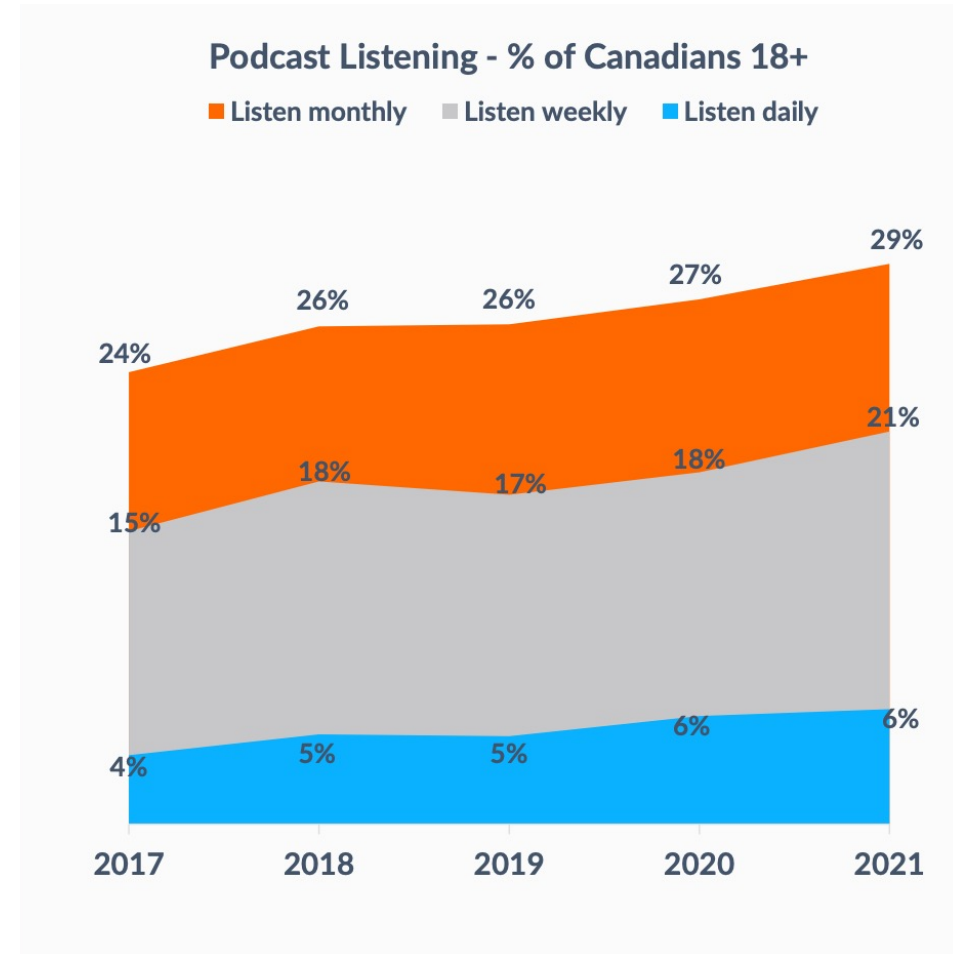


Apple falls to 3rd place as podcast platform used most often

Apple loses its seat to YouTube, while Spotify continues to show strong growth

PODCASTING IS GROWING

- ✓ Growth is steady with year over year incremental growth
- ✓ Podcast listening shifted to slightly more male listeners, 56% in 2021
- ✓ While daily listening is flat, weekly listening to podcasts is growing



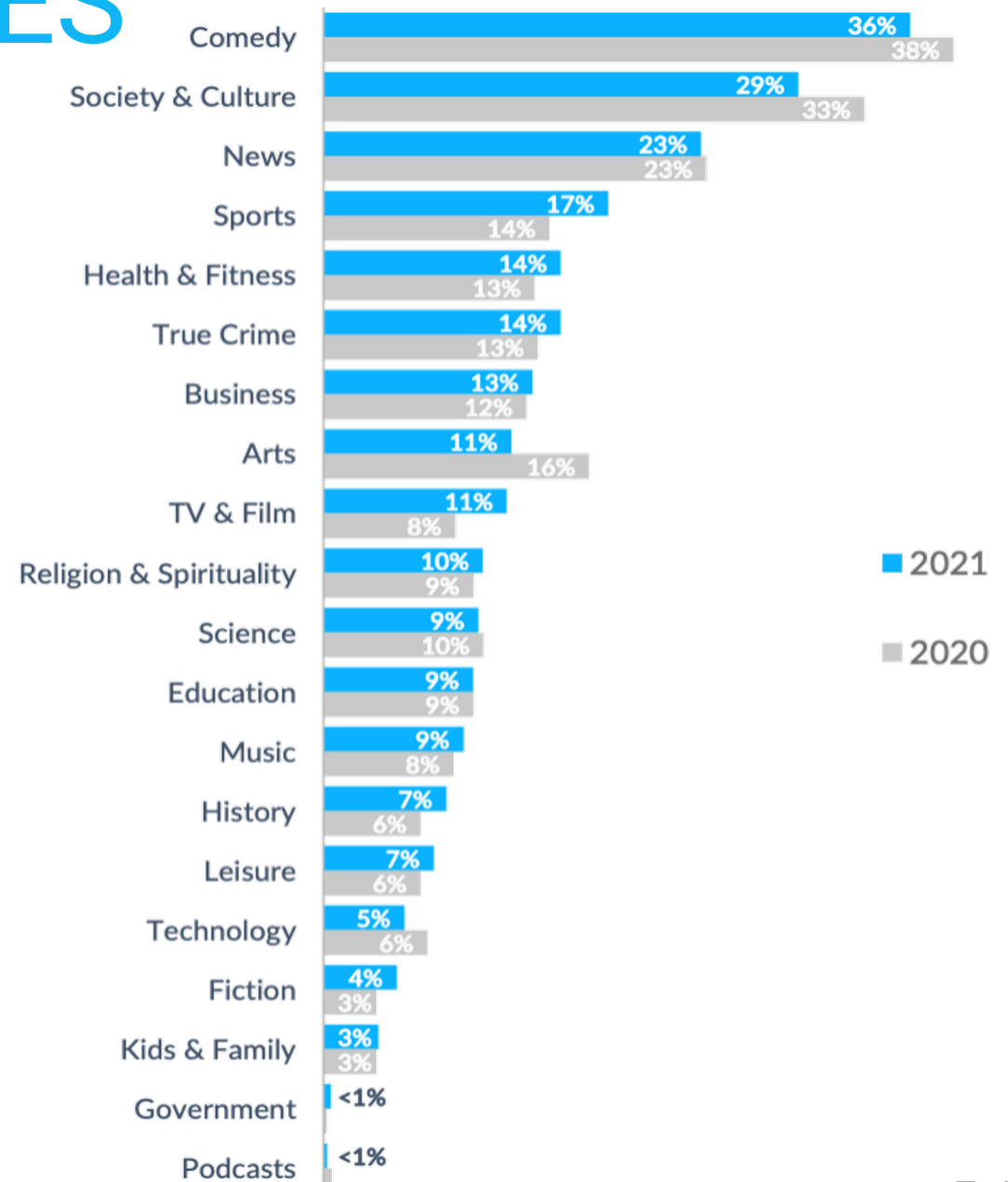
TOP PODCAST GENRES IN 2021



Although Comedy is the most listened to genre, it's at a slightly lower incidence than in 2020



After a drought of sporting events in 2020, Sports podcasts were listened to by more Canadians in 2021, as were TV & Film podcasts.





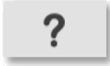


COUNTRY OF ORIGIN

✓ Canadian Podcasts tuning is increasing.

✓ The proportion of US podcasts continues to decline, with homegrown Canadian podcasts making incremental gains, as well as podcasts from Britain and other countries

Of all the podcasts you listen to, about what proportion would you say are from:

	2019	2020	2021
 USA	52%	49%	44%
 Canada	38%	41%	42%
 Britain	4%	5%	6%
 France	2%	2%	2%
 Elsewhere	4%	4%	5%

SUMMARY



AM/FM Radio is alive and kicking

3rd largest Radio market, \$1.5B in revenue and over 700+ stations



AM/FM Radio reaches 85% of Canadians 12+ every week

On average they are listening for 8.5 hrs/wk



Radio reaches more Canadians in 1 week than any social platform

None of the social platforms has the scale and reach of AM/FM Radio



AM/FM Radio is digital

It's available on demand and live on any device



AM/FM Radio commands 44% of the total audio ecosystem

When it comes to advertising, AM/FM Radio has 80+% of the buyable audience.



AM/FM Radio reaches more Canadians than YouTube for Music of Spotify

73% of Spotify listeners are listening to the AD FREE subscription tier



Canadians are renting their music

The business model has changed, where subscriptions are replacing downloads



29% of Canadians listen to podcasts monthly

Most are males, comedy is the favourite genre and Canadian content is gaining traction



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