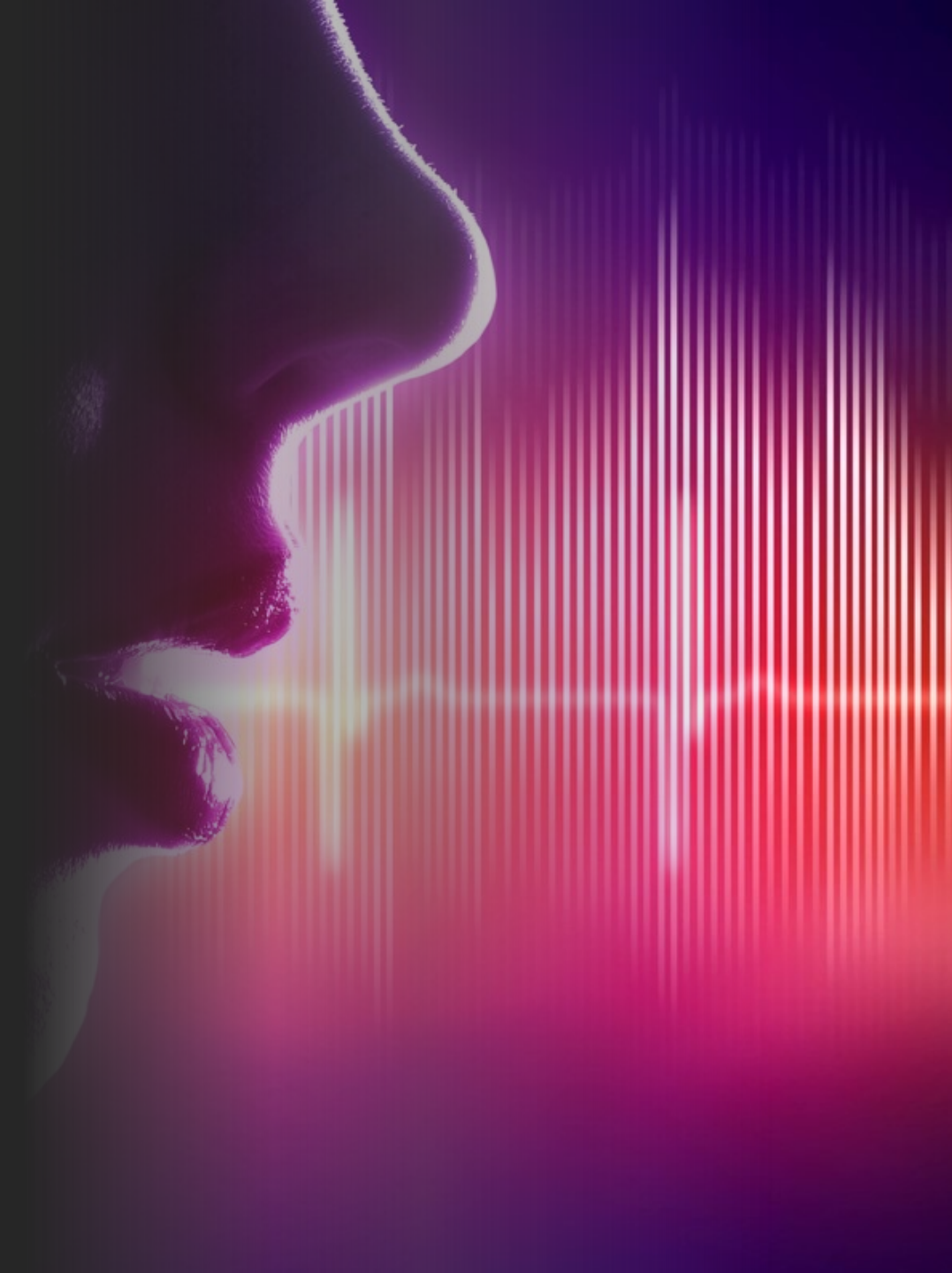


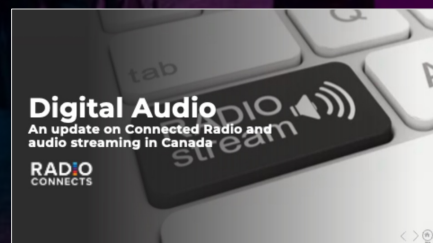
# Rediscover The Power Of AM/FM Radio

**RADIO**  
CONNECTS

Fall 2023



Whether serving a large metropolitan area or a small community, AM/FM Radio is the most reliable means of connection - travelling along as a companion, providing music to entertain, ideas and news to inform and important updates to keep Canadians safe. Free to everyone, over-the-air or through a connected device, it's the only audio platform that reaches the broadest possible audiences, while still feeling personal and familiar.



**RADIO**  
CONNECTS





# Fast Facts

Key points to know about AM/FM  
Radio

**RADIO**  
CONNECTS



ON AIR  
*Radio*

# AM/FM RADIO IN CANADA

## Key Insights

### 3<sup>RD</sup> Largest Radio Market

According to WARC's 2020 Global Report, Canada was 3rd to U.S. and China, but ahead of the U.K., France, Germany, and Australia in Radio spend

Source: WARC 2020

### \$1.1B In Revenue

Advertisers spent over \$1.1 billion in Radio advertising to reach Canadian consumers

Source: CRTC 2022

### Local Radio Drives Business

Local Radio drives business success for Canadian advertisers, representing 60% of dollars spent in Radio advertising

Source: CRTC 2022

### 716 Commercial Radio Stations

119 AM | 597 FM  
529 English | 97 French |  
27 Ethnic | 63 Other

Source: CRTC 2022

### Reaches 86% Of Canadians Each Week

AM/FM reaches 56% of  
12+ Canadians each day

Source: Numeris PPM AW 12+, Spring 2023

### Listen For 7.8 Hours Each Week

Across the 6 PPM markets, Canadians  
spend almost 8 hours a week with AM/FM  
Radio

Source: Numeris PPM AW 12+, Spring 2023



# AM/FM RADIO IN CANADA

## Key Insights



### AM/FM Radio's Reach Is Unsurpassed

AM/FM Radio reaches 86% of Canadians each week and over 56% each day. Canadians are tuning in for almost 8 hours a week in PPM markets, and even longer outside of major urban centres

Source: Numeris PPM TC AW 12+ Sp 2023



### AM/FM RADIO Has The Largest Share Of Buyable Audio Audiences

With a 74% share, AM/FM share of buyable audio audience is almost 7.5x greater than free music streaming's

Source: ROTM



### AM/FM Radio Has 94% Of Buyable Share Of In-car Audio

AM/FM Radio has 94% of buyable share of audio

Source: ROTM



### AM/FM Radio Is Digital

16% of tuning to AM/FM Radio is consumed over a connected device, with another 4% of Canadians are listening through their Televisions

Source: ROTM.



### AM/FM Radio Streaming Reaches More Canadians Than Free Spotify

AM/FM Radio streaming reaches more Canadians than free Spotify

Source: ROTM



### Canadians Respond To Ads They Hear On AM/FM Radio

Almost 1/3 of Canadians report taking some sort of action after hearing about a product or service advertised on the Radio

Source: ROTM



# THREE DIFFERENT METHODOLOGIES TO MEASURE AM/FM RADIO IN CANADA

Passive collection, self-reported diaries and day-after recall



## **Portable People Meters (PPMs)**

Numeris uses a national panel of 4,560 HH; 8,700+ Canadians, shared with TV, providing passive measurement in 6 of Canada's largest markets, apx. 55% of population. Data is released in 13-week cycles



## **Online Diaries**

Measurement of 22 of the "B" markets in Canada most often bought by national advertisers, are measured by Numeris every other week over 50 weeks, with data released in the Fall and Spring



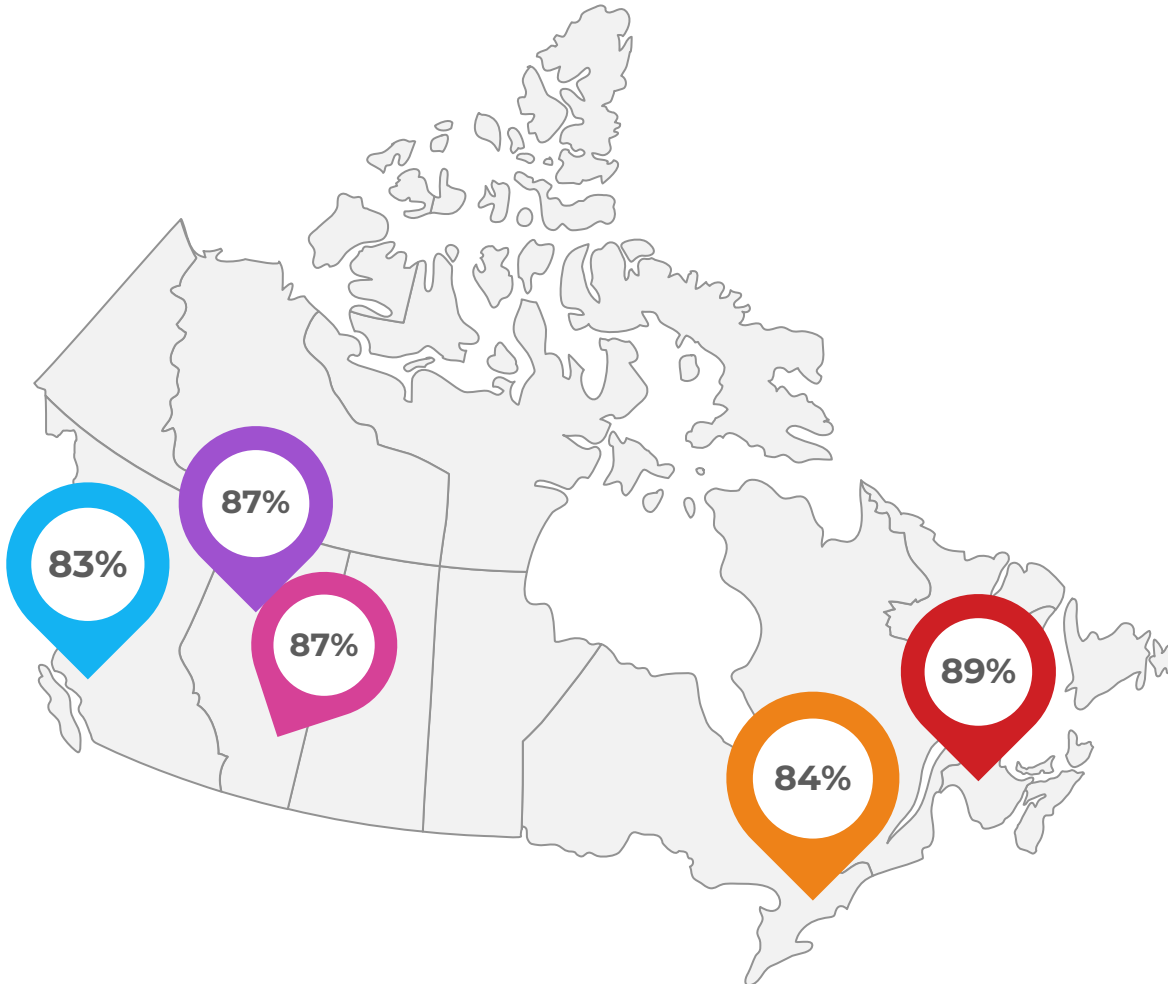
## **CATI Interviews**

radioCount conducts phone interviews over one 8-week measurement period each Fall in 22 markets, however some markets are measured continuously throughout the year



# CANADIANS ARE TUNED TO AM/FM RADIO

AM/FM Radio reach dominates the audio landscape



**AM/FM Radio only audio platform that can deliver commercial messaging at scale, minute by minute**

Radio's Reach  
A18+ Top 5 Markets<sup>1</sup>

11,917,896

Average Minute Audiences  
A18+ Top 5 Markets<sup>1</sup>

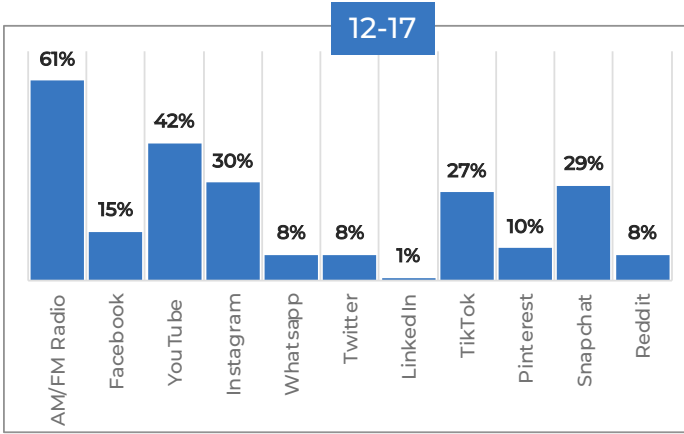
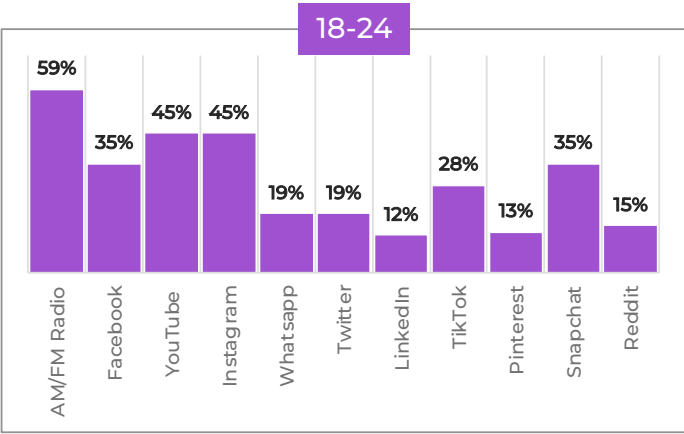
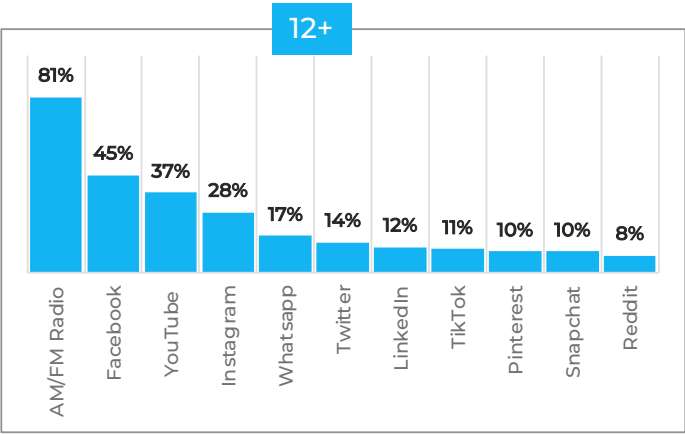
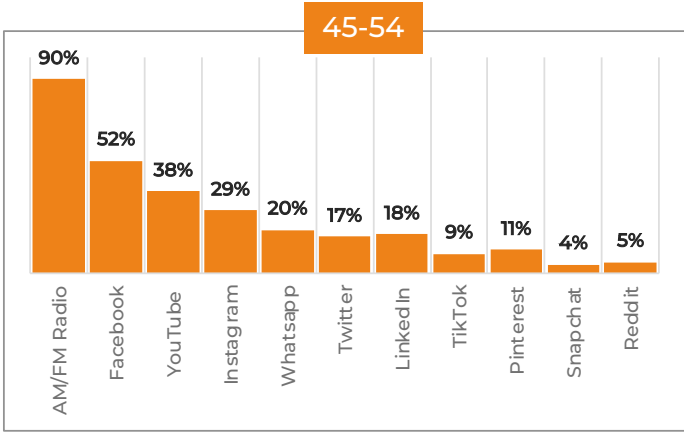
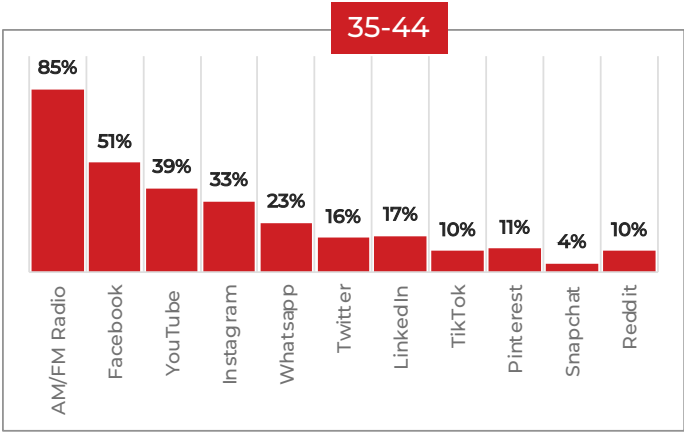
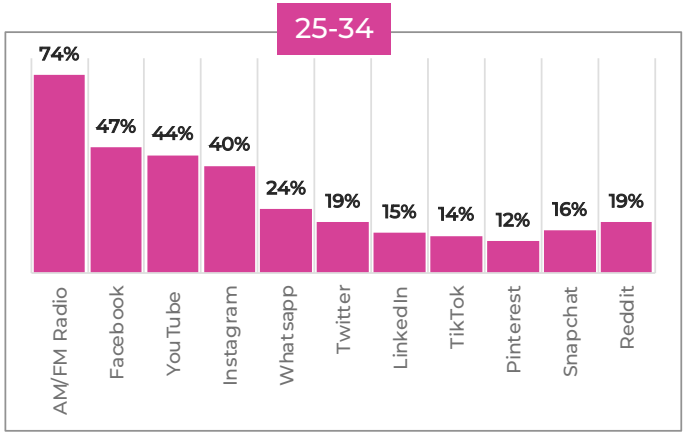
564,695

AM/FM's Share of Buyable  
Audio A18+<sup>2</sup>

74%

Source: 1. Numeris PPM Total Meter CTRL, Adults 18+, Average Weekly Reach, AMA, Spring 2023| Map: Vancouver Ctrl / Edmonton Ctrl / Calgary Ctrl / Toronto Ctrl / Montreal Ctrl | 2. ROTM 2023

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

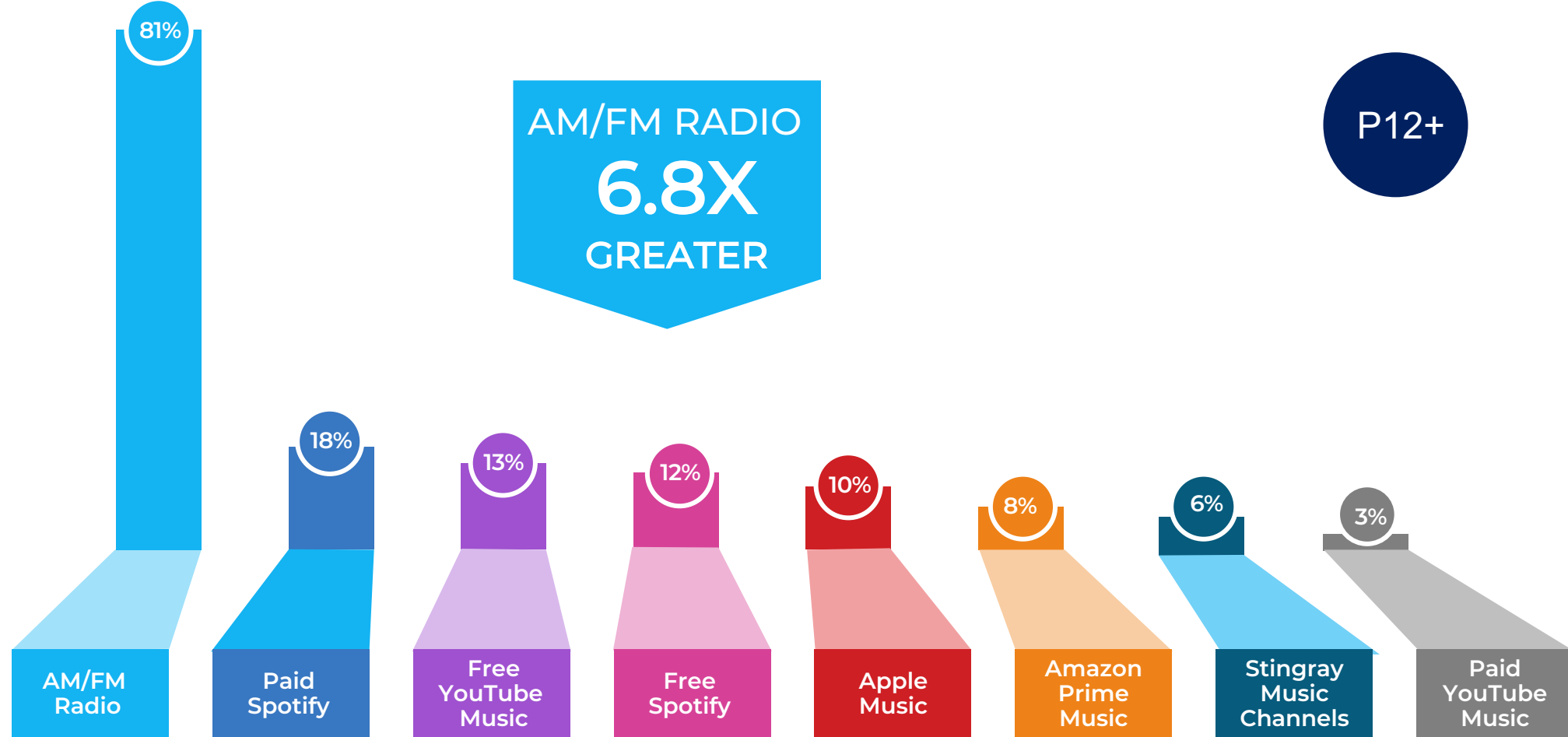


Source: RTS Spring 2023 Canada social networks used past 7 Days / AM/FM Radio 7-day cume



# AM/FM RADIO BEATS ALL AUDIO PLATFORMS

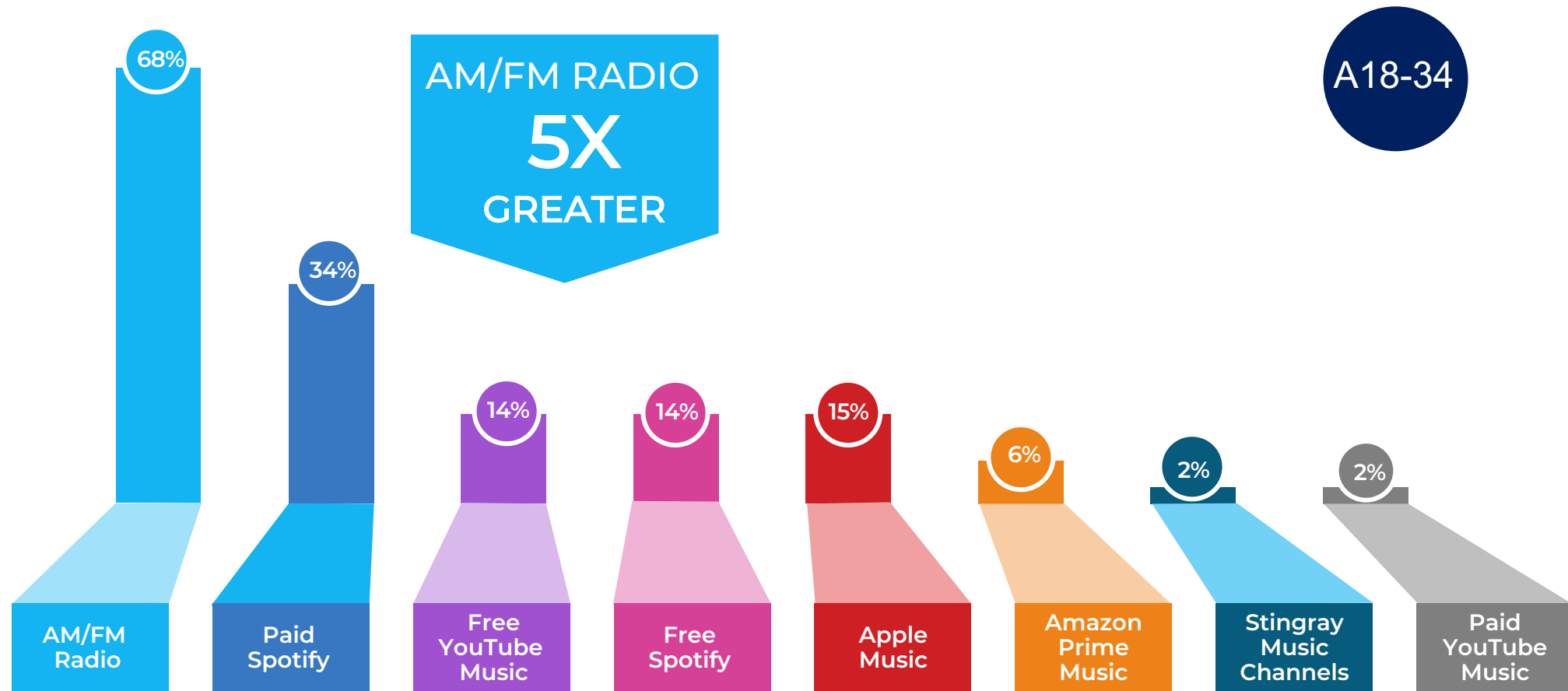
More Canadians are reached by AM/FM Radio vs. any audio platform, whether paid or free



Source: RTS Spring 2023 Canada / Past 7 days / AM/FM Radio / Used App, Web, or Internet-based service

# AM/FM RADIO BEATS ALL AUDIO PLATFORMS

More Canadians are reached by AM/FM Radio vs. any audio platform, whether paid or free



Source: RTS Spring 2023 Canada / Past 7 days / AM/FM Radio / Used App, Web, or Internet-based service



# AM/FM RADIO BEATS ALL AUDIO PLATFORMS

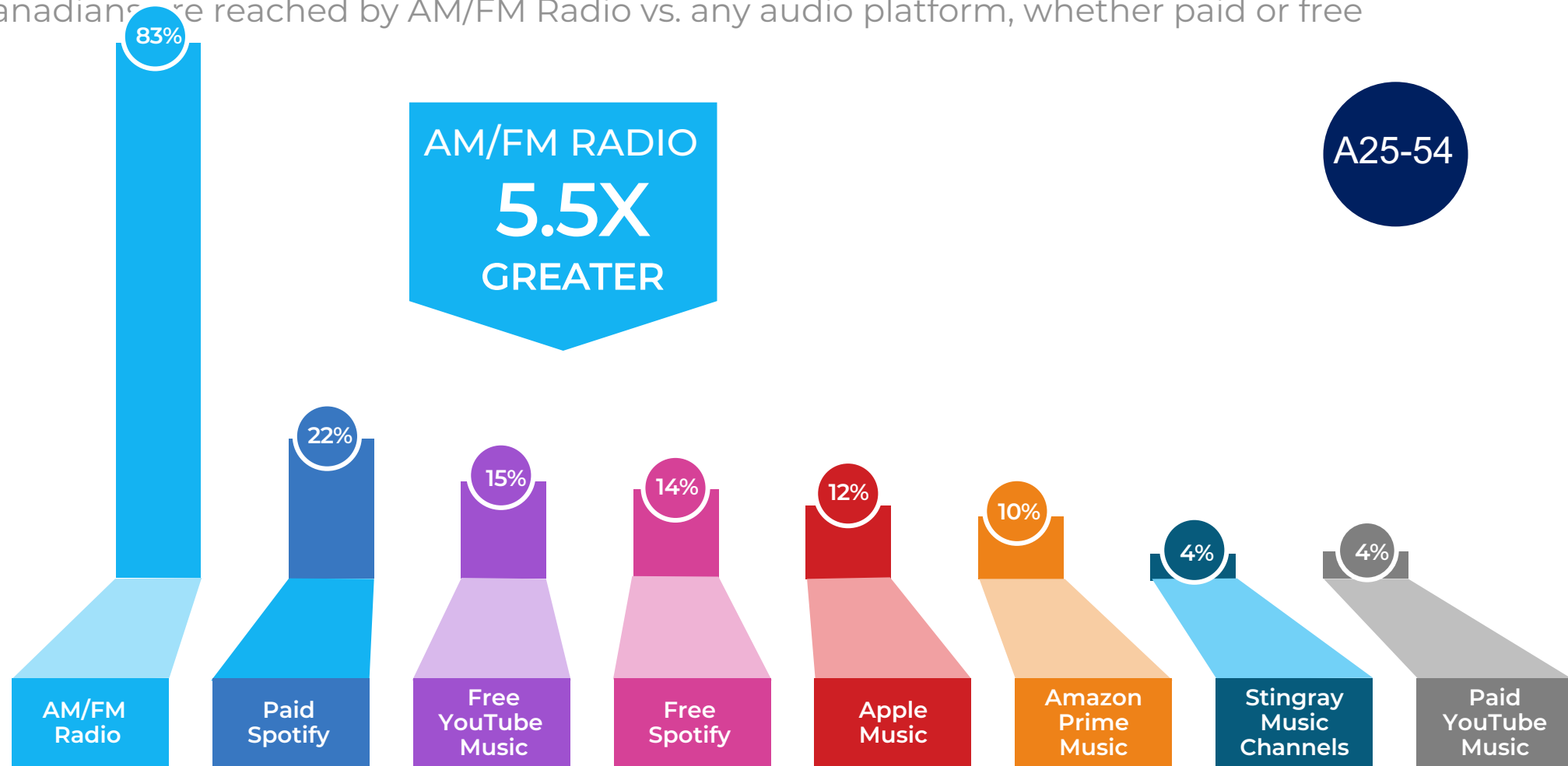
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# AM/FM RADIO BEATS ALL AUDIO PLATFORMS

More Canadians are reached by AM/FM Radio vs. any audio platform, whether paid or free



Source: RTS Spring 2023 Canada / Past 7 days / AM/FM Radio / Used App, Web, or Internet-based service



# Ad-supported Audio

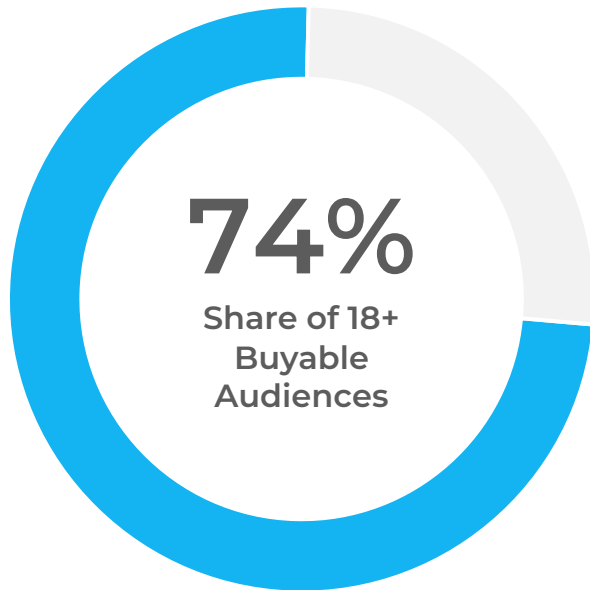
A look at the ad-supported audio  
landscape, in and out of the car

**RADIO**  
CONNECTS

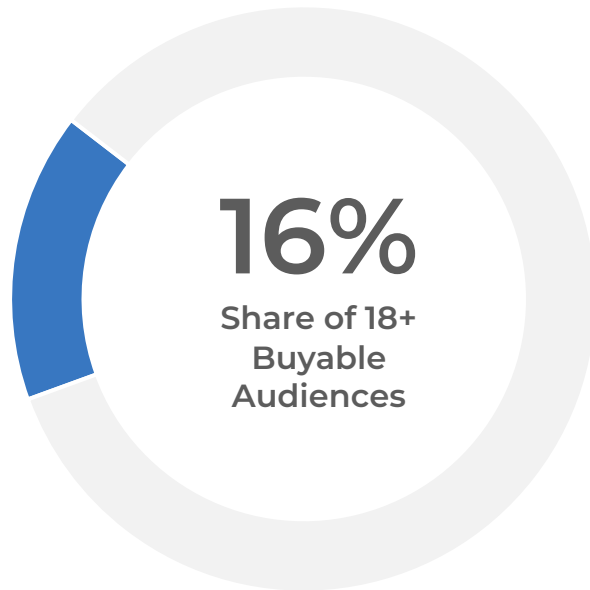


# AM/FM RADIO HAS THE LARGEST SHARE OF BUYABLE AUDIENCES

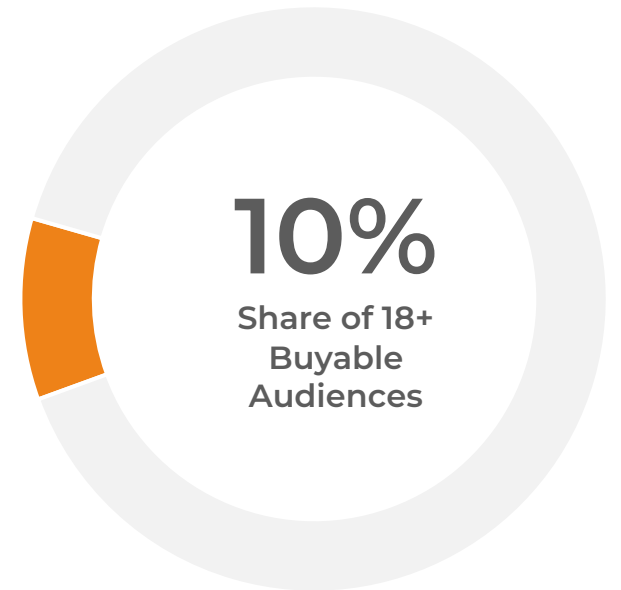
AM/FM Radio has the largest share of buyable audiences



AM/FM  
Radio



Podcasts

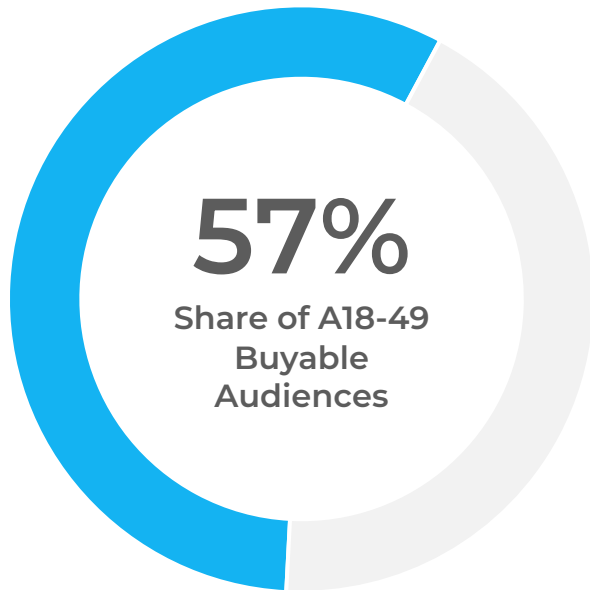


Free Music  
Streaming

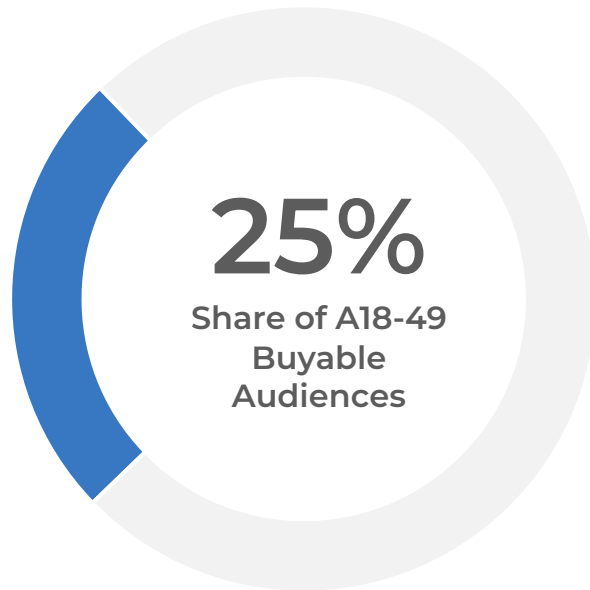
Source: ROTM

# AM/FM RADIO HAS THE LARGEST SHARE OF BUYABLE AUDIENCES FOR A18-49

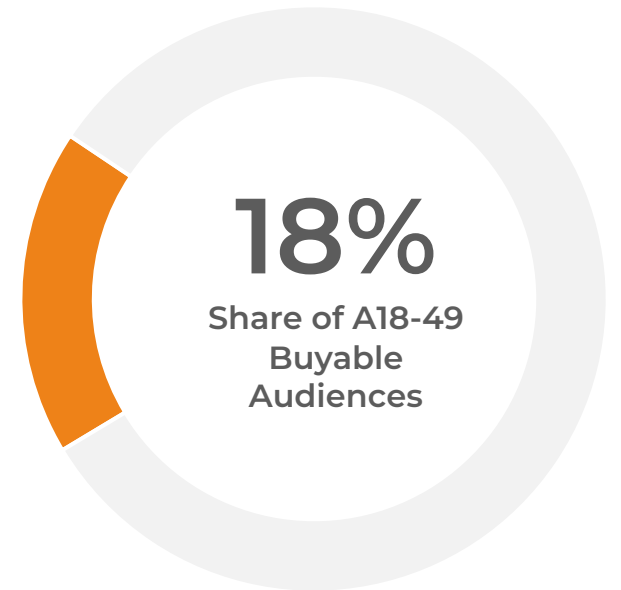
AM/FM Radio has the largest share of buyable audiences



AM/FM  
Radio



Podcasts

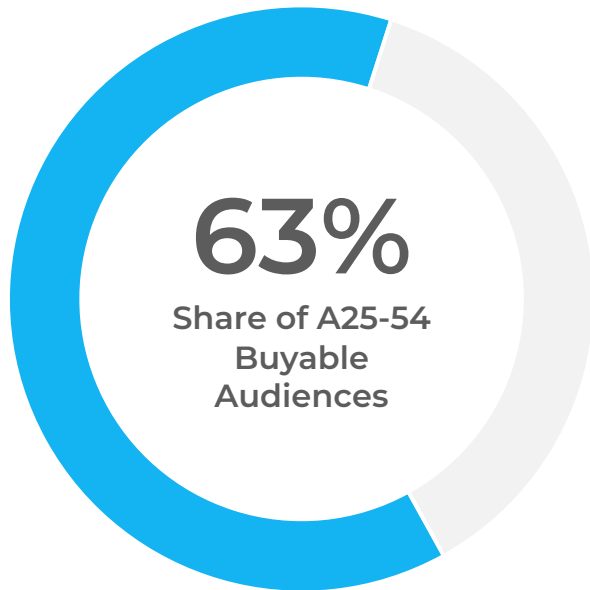


Free Music  
Streaming

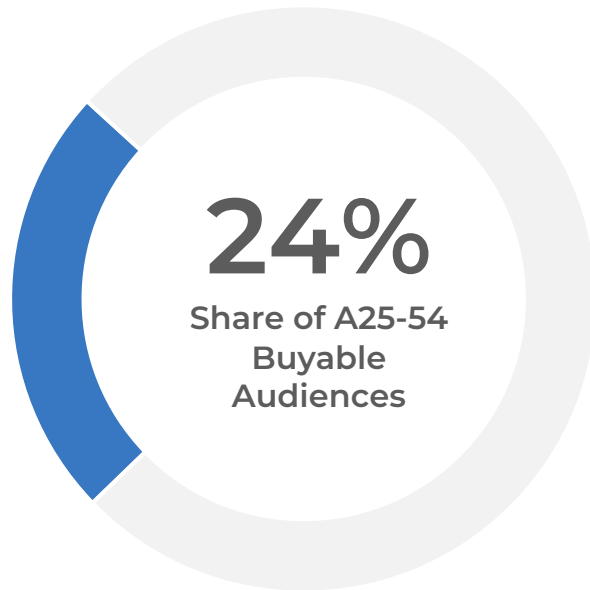
Source: ROTM

# AM/FM RADIO HAS THE LARGEST SHARE OF BUYABLE AUDIENCES FOR A25-54

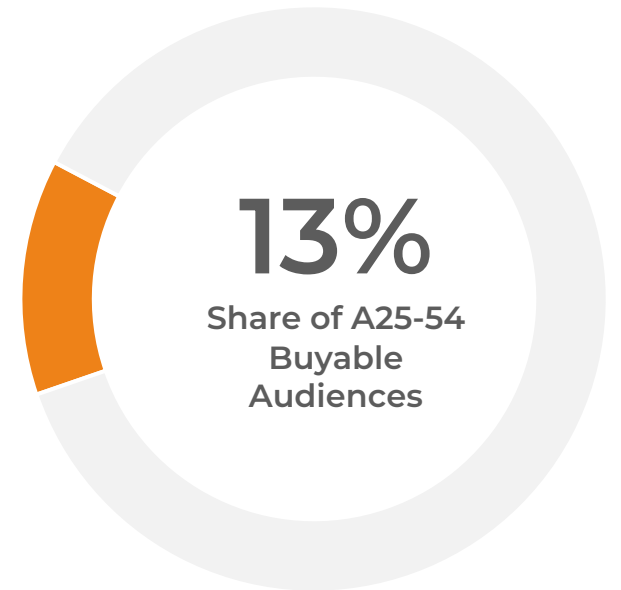
AM/FM Radio has the largest share of buyable audiences



AM/FM  
Radio



Podcasts



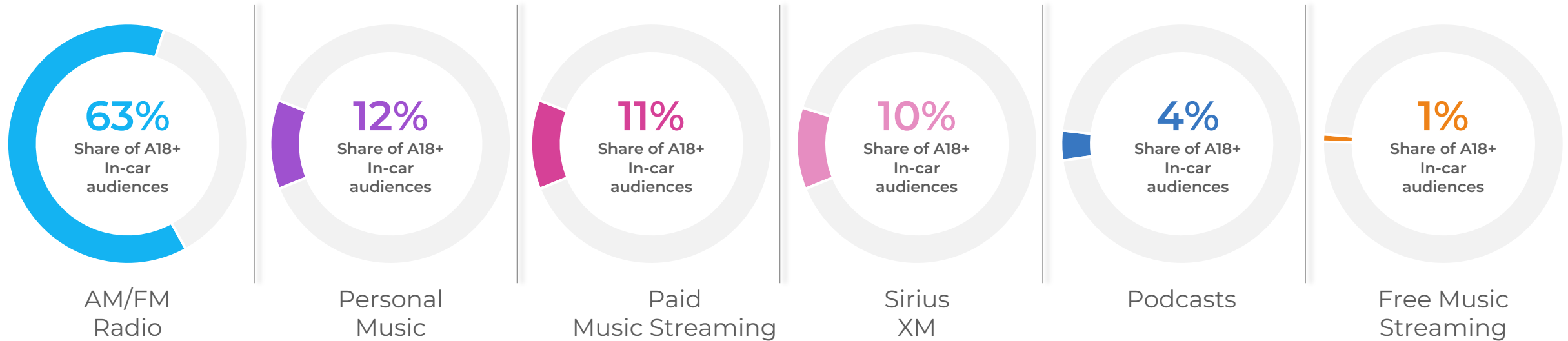
Free Music  
Streaming

Source: ROTM



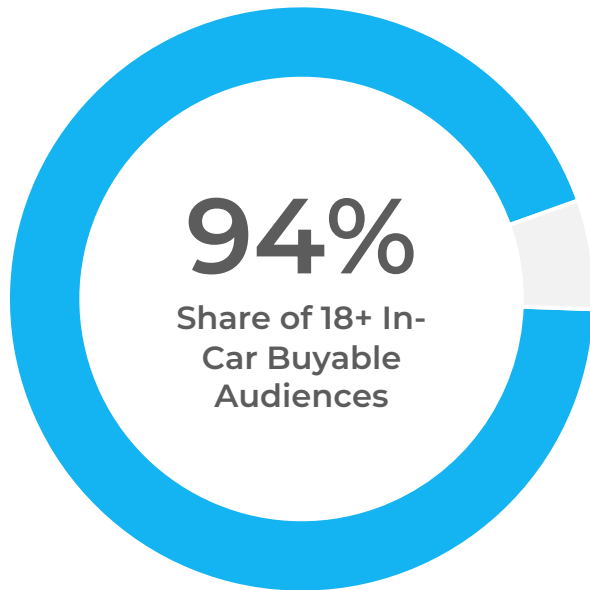
# AM/FM RADIO IS IN THE DRIVER'S SEAT FOR IN-CAR AUDIO

AM/FM Radio is the audio platform of choice when Canadians are on the go.

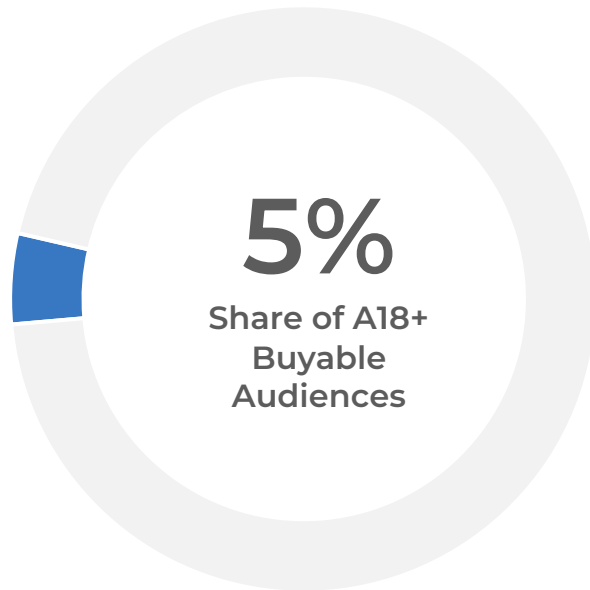


Source: ROTM

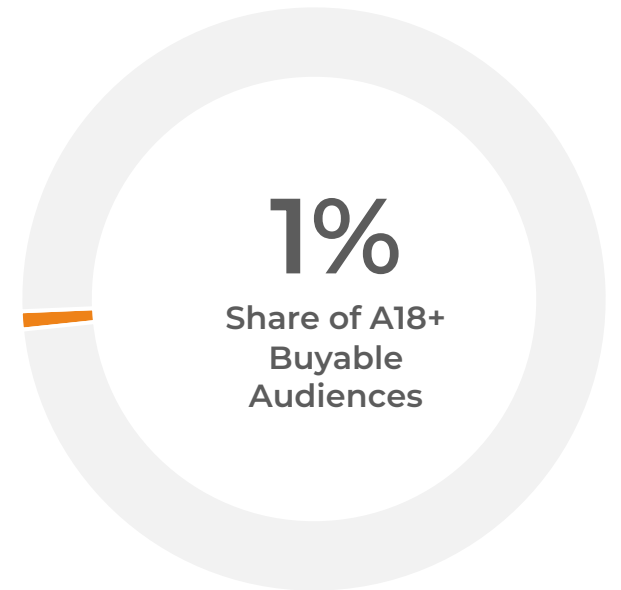
# AM/FM RADIO HAS 94% OF BUYABLE SHARE OF IN-CAR AUDIO FOR CANADIANS ON THE MOVE



AM/FM  
Radio



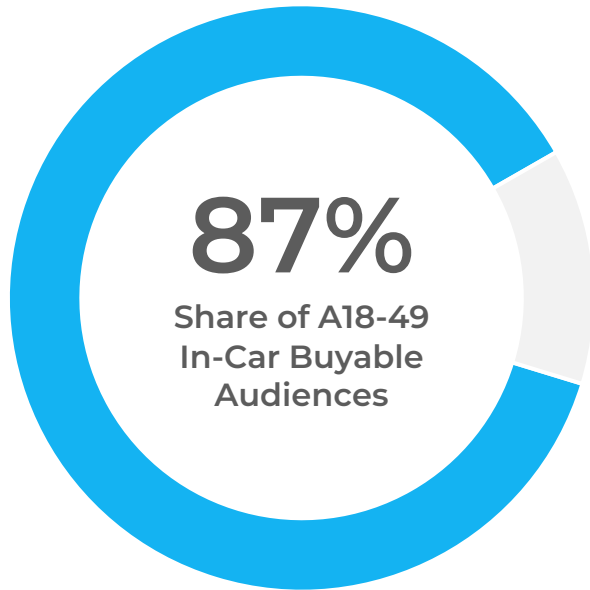
Podcasts



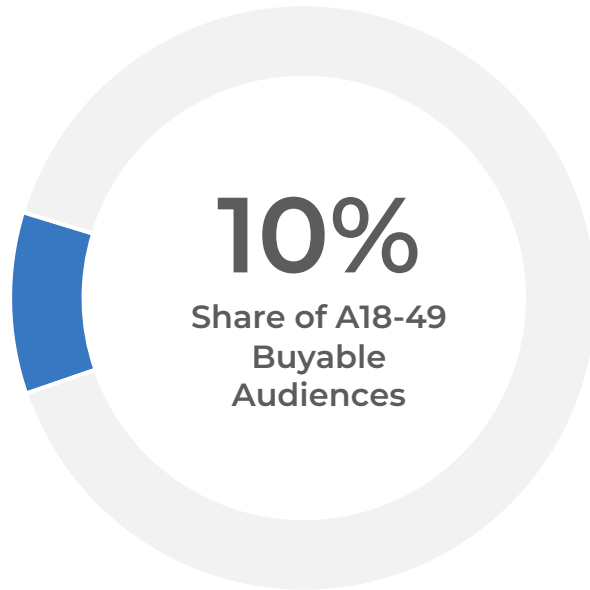
Free Music  
Streaming

Source: ROTM

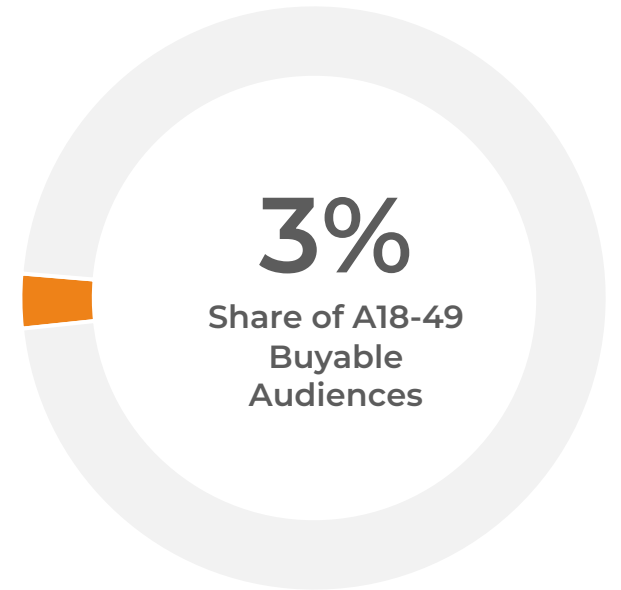
# AM/FM RADIO HAS 87 % OF BUYABLE SHARE OF IN-CAR AUDIO FOR A18-49 ON THE MOVE



AM/FM  
Radio



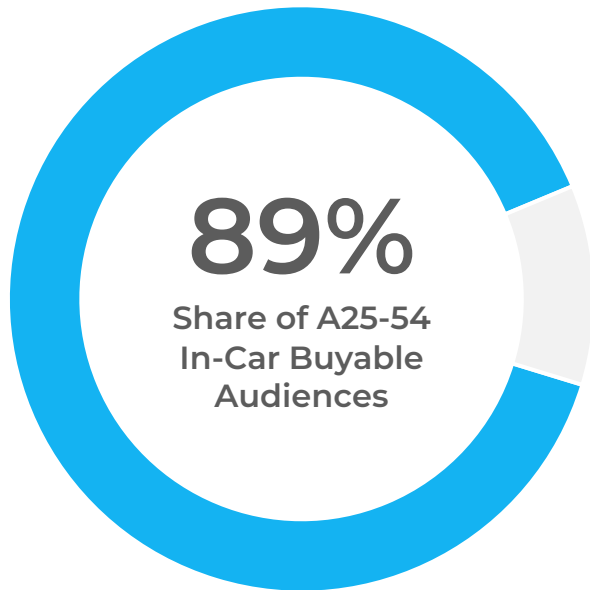
Podcasts



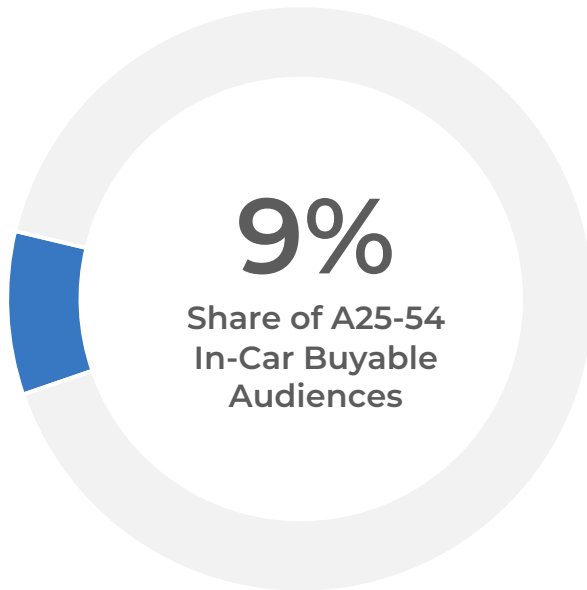
Free Music  
Streaming

Source: ROTM

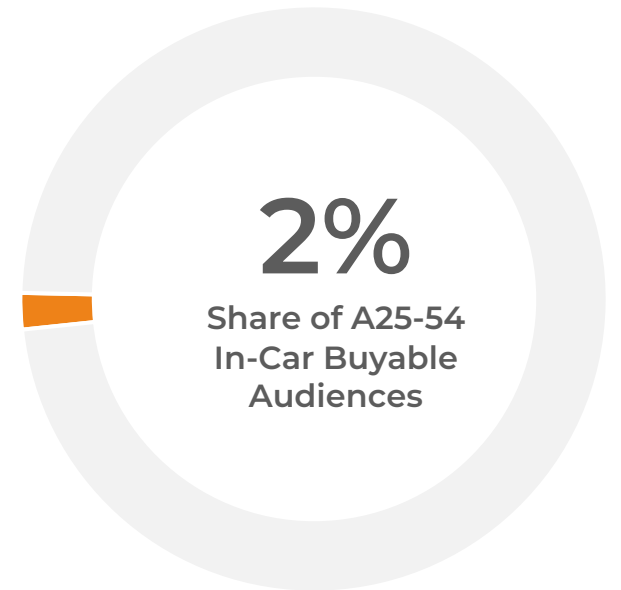
# AM/FM RADIO HAS 89 % OF BUYABLE SHARE OF IN-CAR AUDIO FOR A25-54 ON THE MOVE



AM/FM  
Radio



Podcasts



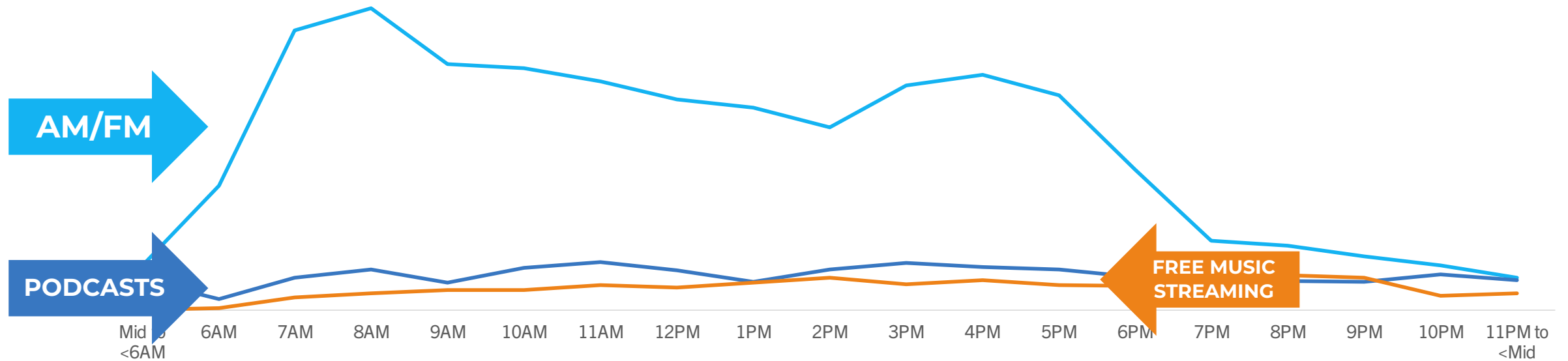
Free Music  
Streaming

Source: ROTM



# AM/FM RADIO HAS THE LARGEST BUYABLE AUDIENCES THROUGHOUT THE DAY

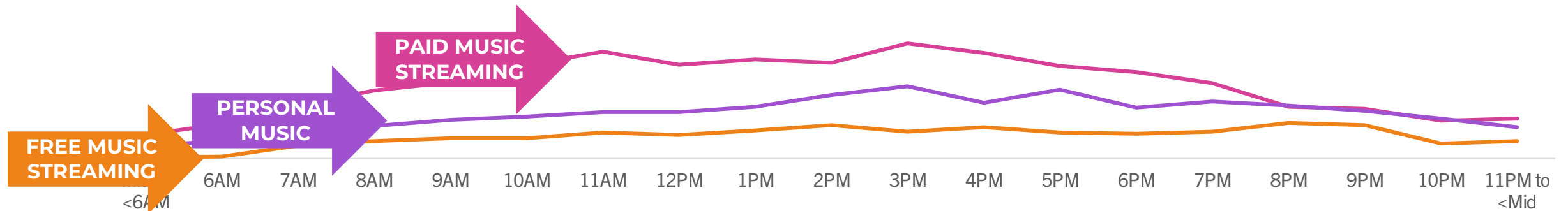
When screens are off and stores are open, AM/FM Radio is on.



Source: ROTM

# OWNED MUSIC AND MUSIC STREAMING PLATFORMS FOLLOW THE SAME LISTENING PATTERNS

As a digital extension of owned personal music, music streaming helps listeners escape, relax and disconnect from the everyday – providing “me time.”



Source: ROTM

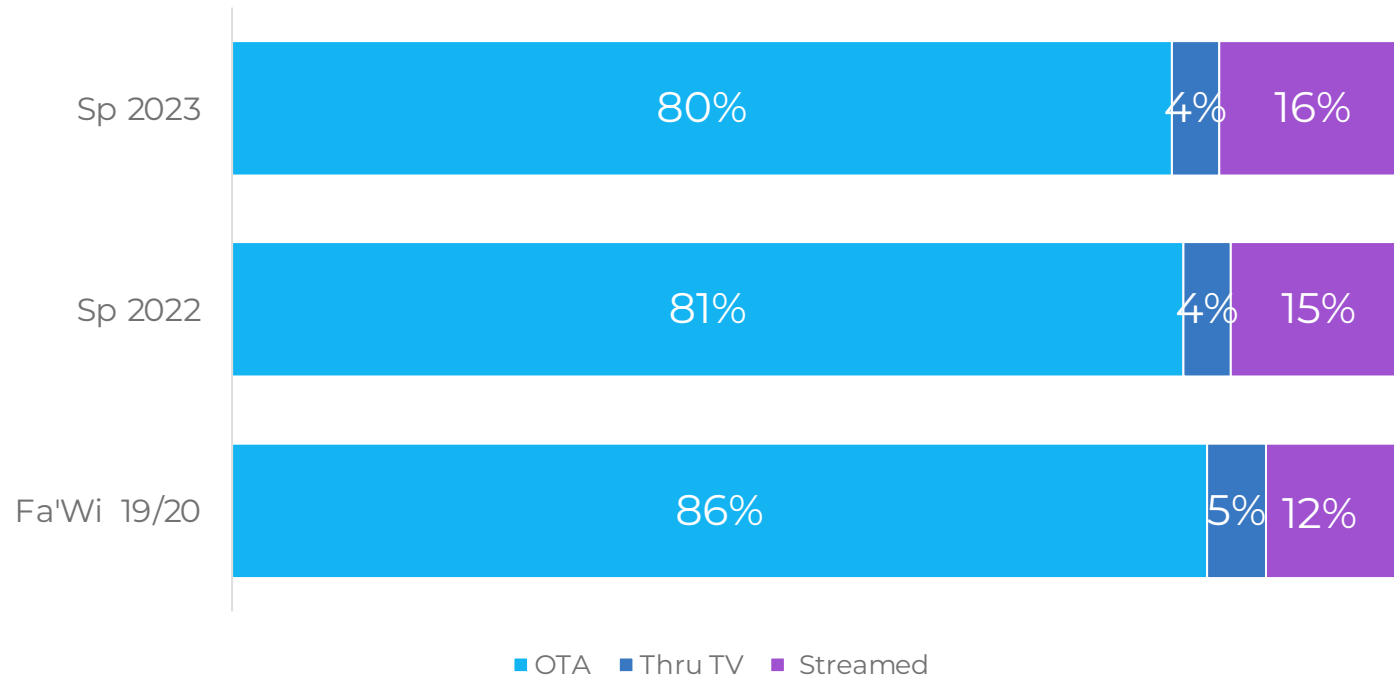
# Digital Audio

An update on Connected Radio and audio streaming in Canada

**RADIO**  
CONNECTS

# AM/FM RADIO IS CONNECTED

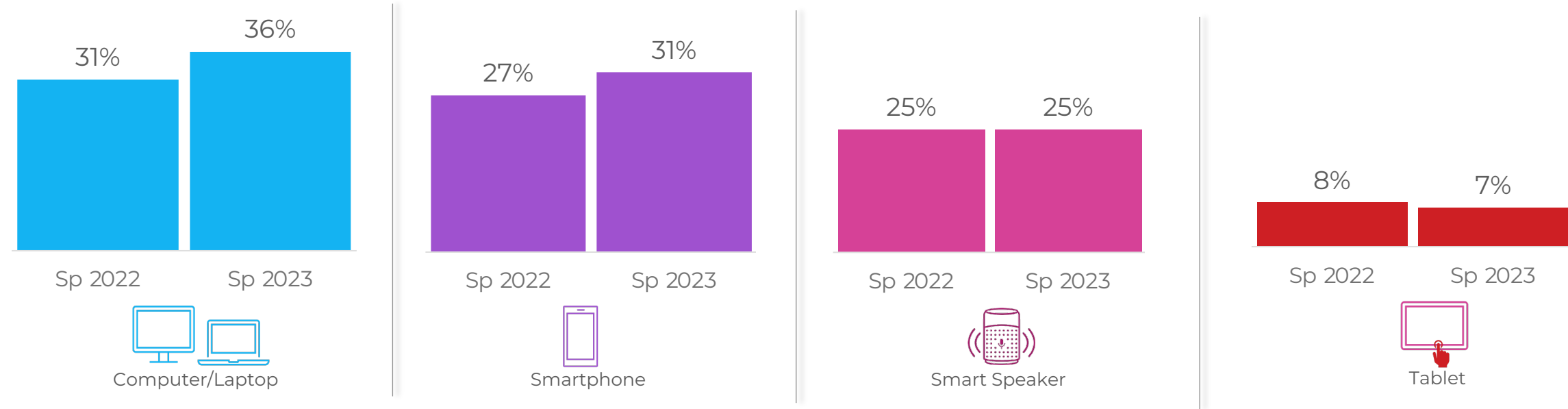
AM/FM Radio increasingly part of the digital future



Source: ROTM

# CANADIANS ARE STREAMING AM/FM RADIO ON DIFFERENT DEVICES

Past week listening to connected AM/FM Radio, by device, among A18+ who streamed AM/FM in the past week:



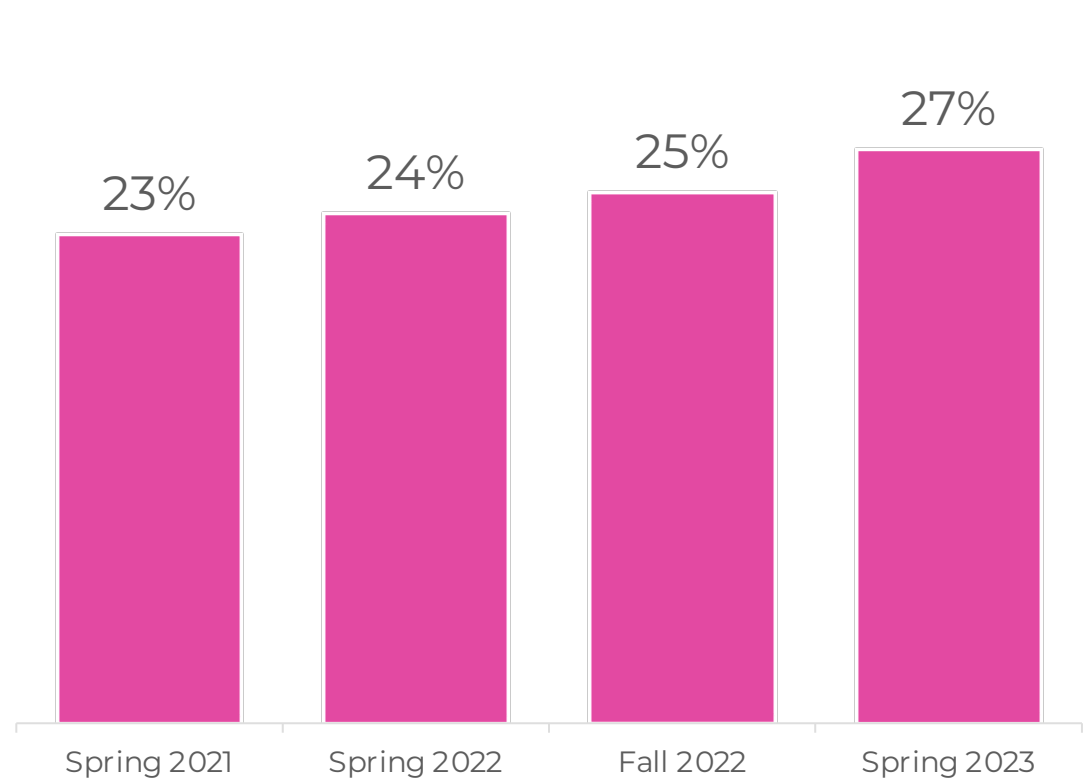
Source: ROTM



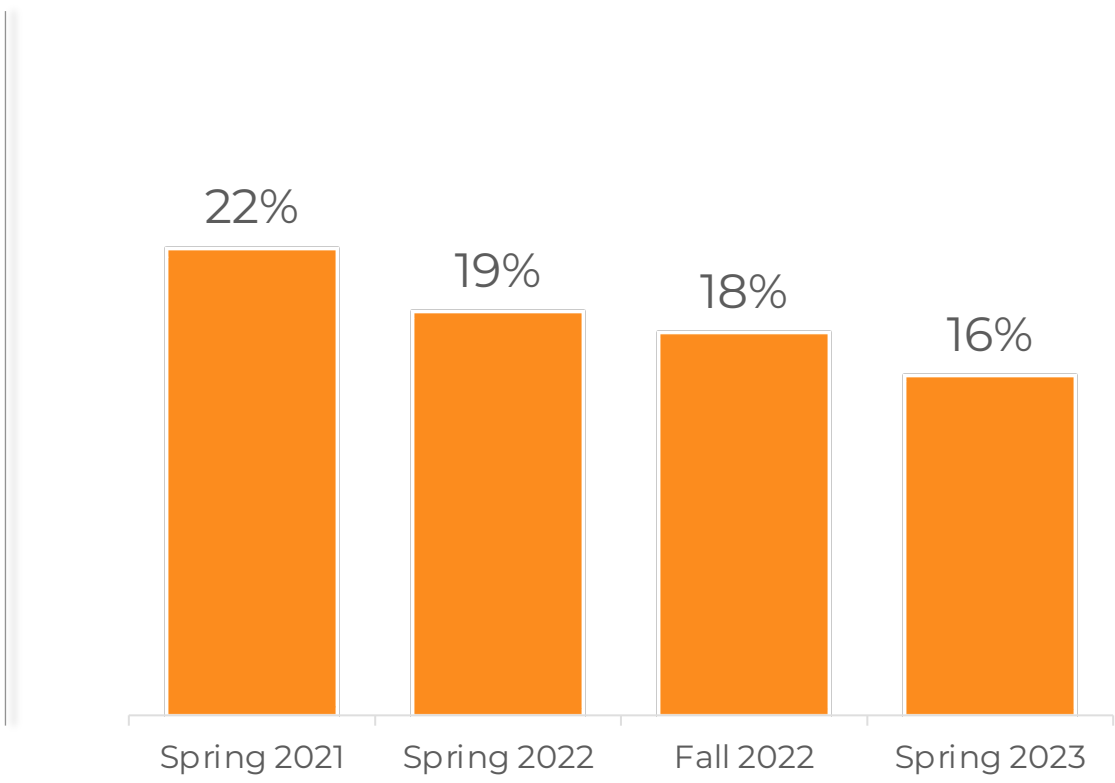
# THE REACH OF PAID STREAMING CONTINUES TO GROW WHILE REACH OF FREE STREAMING IS DECLINING AS PEOPLE SWITCH FROM OWNING TO RENTING THEIR MUSIC

More listeners are paying for ad-free music streaming.

Paid Music Streaming – Past Week



Free Music Streaming – Past Week



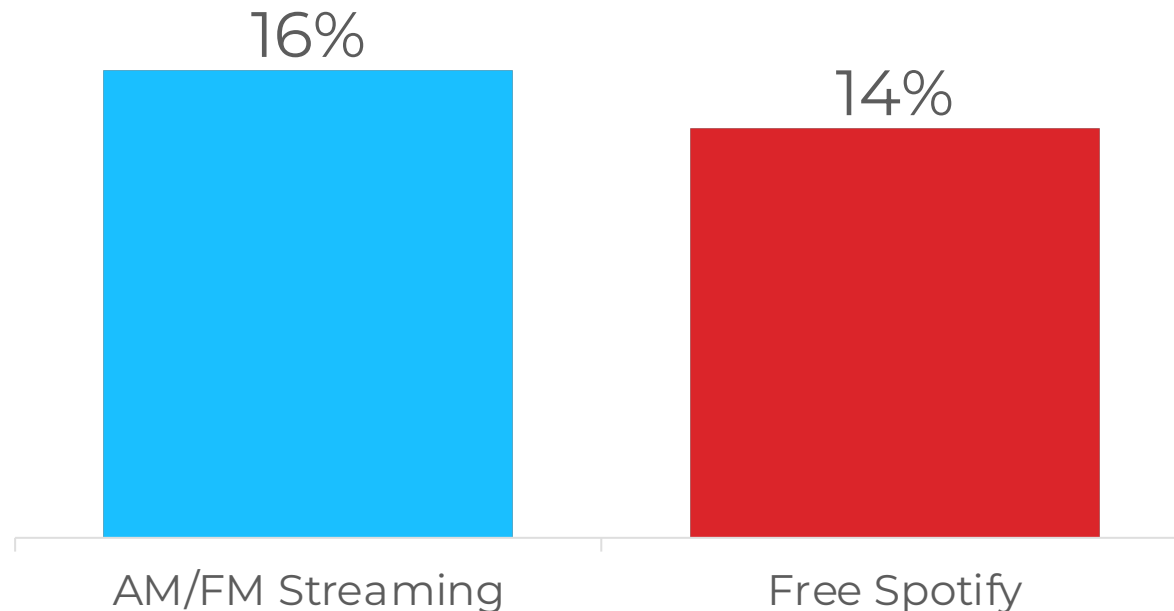
Source: ROTM

# AM/FM RADIO STREAMING REACHES MORE CANADIANS THAN FREE SPOTIFY

More Canadians are listening to connected AM/FM Radio than are listening to Free Spotify in an average week.

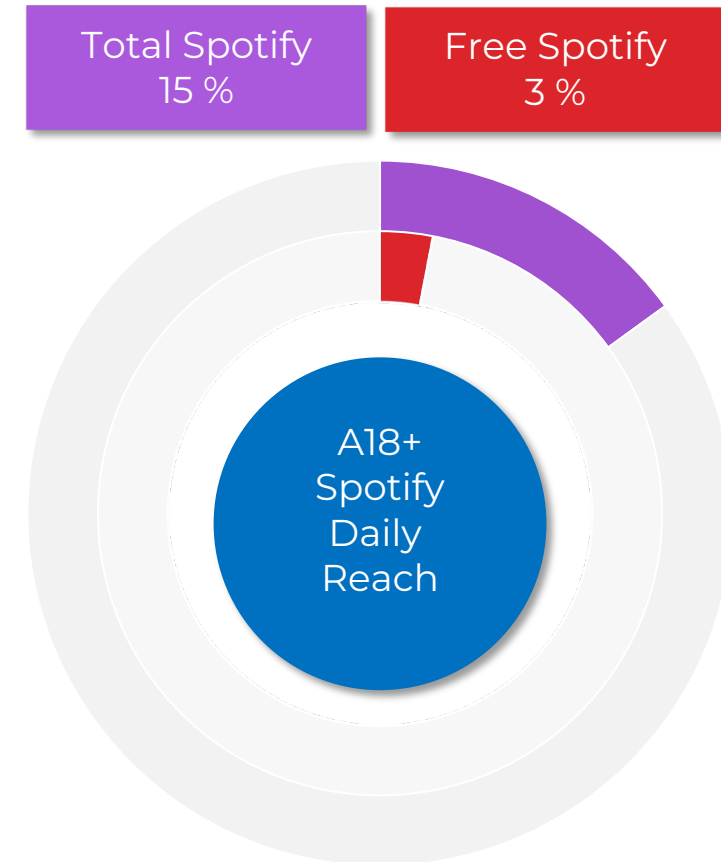
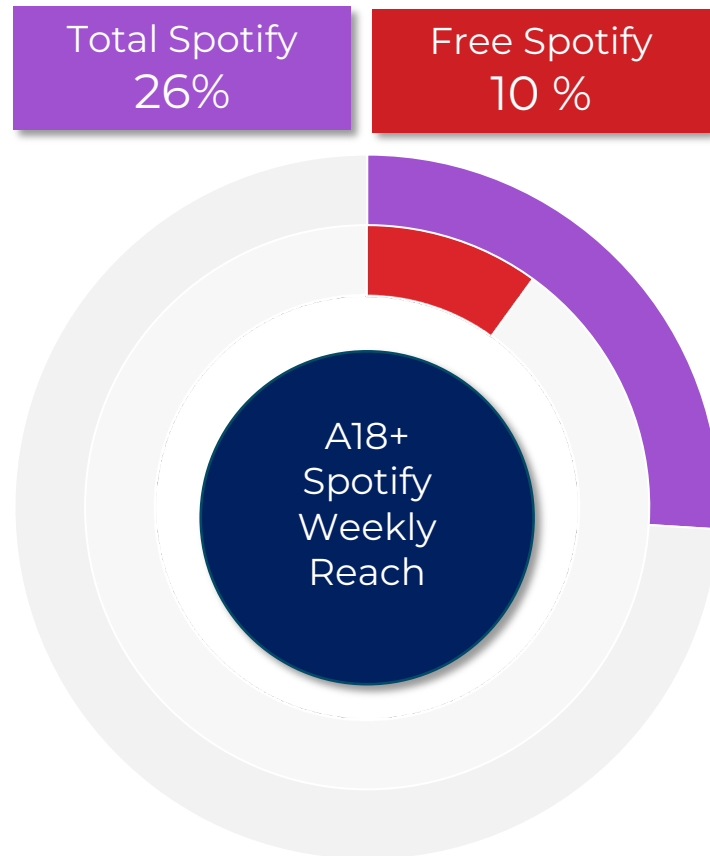
Past week usage A25-54

Growth in AM/FM streaming is making AM/FM a force in digital audio, with more past week streamers than Free Spotify



Source: ROTM

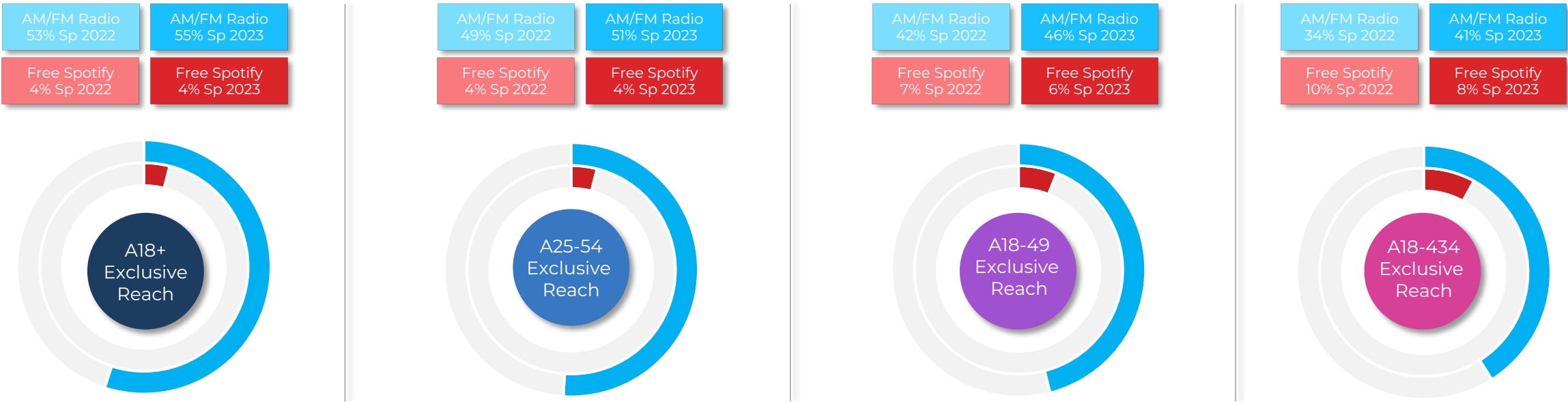
# REACH OF FREE SPOTIFY IS A FRACTION OF SPOTIFY'S TOTAL AUDIENCE



Source: ROTM

# AM/FM RADIO DELIVERS GREATER EXCLUSIVE WEEKLY REACH THAN FREE SPOTIFY FOR ALL DEMOS

AM/FM Radio has seen an increase in exclusive reach across all major demos, while Spotify is flat or down.



Source: ROTM

# MUSIC STREAMERS ARE HEAVY RADIO LISTENERS

Among past week users of online music streaming services or YouTube for music:



**76%**

say they listen to  
AM/FM Radio on “a  
typical weekday”

**16%**

are heavy AM/FM  
Radio listeners (listen for  
2+ hrs/typical weekday)

Source: ROTM



# AM/FM RADIO IS THE AUDIO REACH MACHINE FOR ADVERTISERS

AM/FM Radio is the dominant audio platform for advertising

**85%\***

AM/FM Radio's  
weekly reach  
against  
A25-54

\*PPM Total Canada AW Spring 2023

## Adults 25-54 Listening in the past week to the following:

Music on YouTube	47%
Paid Music Streaming	36%
Personal Music	29%
Podcasts	25%
Free Music Streaming	20%
Sirius XM	11%
Audio Books	7%
Stingray Music	7%

Ad-supported Audio

Source: ROTM



# Podcasting

Highlights from the Canadian  
Podcasting Listener survey

**RADIO**  
CONNECTS





# PODCAST STATS



Source: The Canadian Podcast Listener 2022

**53%**

More than half of Canadian adults say they have “ever listened” to a podcast, up 5 points from 2021 and 9 points since 2020

**34%**

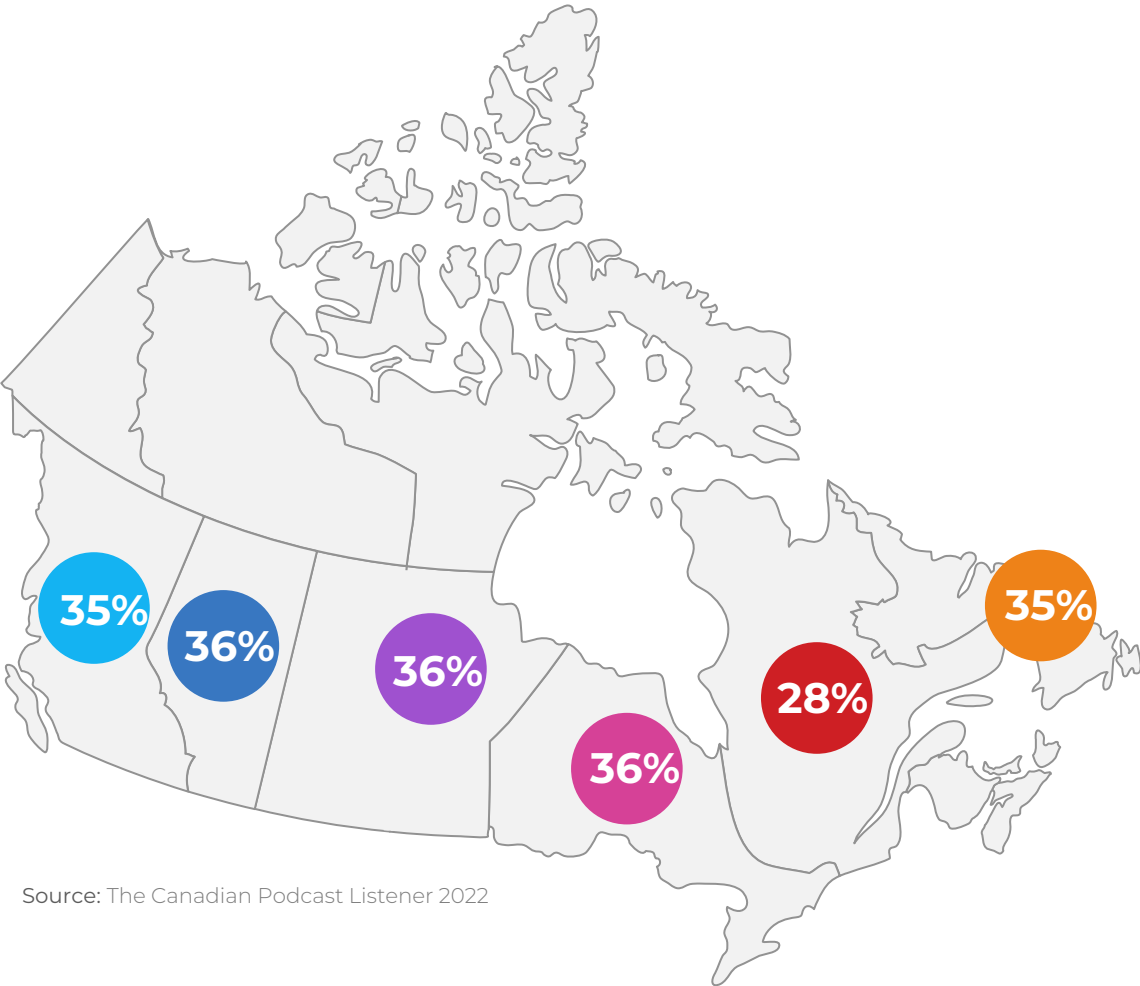
Monthly listening is up in Total Canada, with French Canada posting its second year of growth - 25% of French-speaking Canadians now listening to podcasts monthly

**65%**

Although slightly down from a year ago as Canadians return to commuting, a higher proportion of listening is still occurring in the home

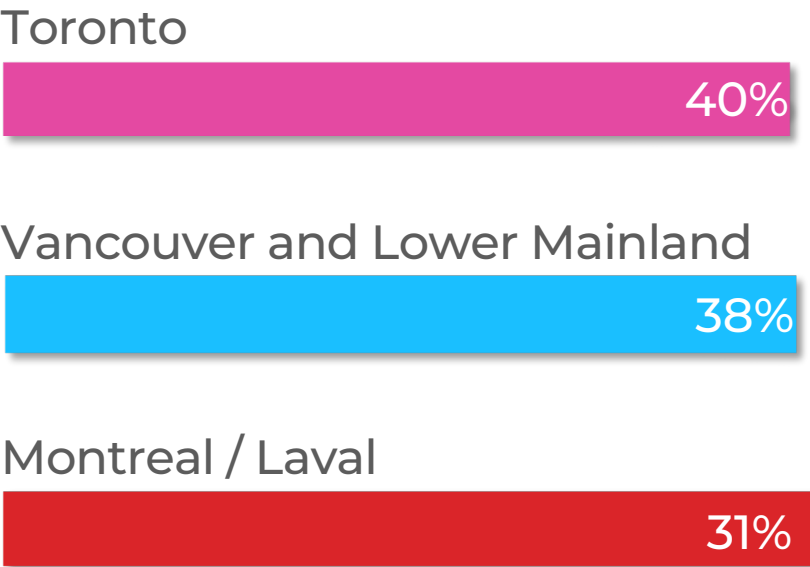
# PODCASTING LISTENING ACROSS CANADA

Penetration of monthly podcasting is now virtually identical at 35% or 36% in each region of English Canada



Source: The Canadian Podcast Listener 2022

**Monthly podcast listening is still slightly stronger in major urban areas than it is in their corresponding regions.**



# THE CANADIAN PODCAST LISTENER

Even as the Canadian podcast audience fills in outside the major urban centres, there is little change in audience composition.

Listener profile continues to reflect a young, well-educated, diverse and affluent audience



Source: The Canadian Podcast Listener 2022

# TOP PODCAST GENRES IN 2022

Listening was up for Comedy, Society & Culture, News and True Crime podcasts, and Comedy is still number 1.

Increased listening to Comedy and True Crime suggests a shift to more escapist entertainment. Meanwhile, listening dipped for many of the more niche genres

Please list up to 10 podcasts you remember listening to in the past month					
		2022	2021		
Comedy	↑	40%	36%	TV & Film	↓
Society & Culture	↔	29%	29%	Music	↓
News	↑	24%	23%	History	↓
True Crime	↑	17%	14%	Science	↓
Health & Fitness	↔	14%	14%	Religion & Spirituality	↓
Sports	↓	13%	17%	Leisure	↓
Business	↓	11%	13%	Technology	↓
Arts	↓	10%	11%	Fiction	↓
Education	↑	10%	9%	Kids & Family	↓

Source: The Canadian Podcast Listener 2022



# PODCAST COUNTRY OF ORIGIN

Content from the U.S. is still number 1, but Canadian content is catching up.

Homegrown Canadian podcasts are getting closer to podcasts from the U.S. for share of listening by Canadians

Of all the podcasts you listen to, about what proportion would you say are from:				
	2019	2020	2021	2022
USA	52%	49%	44%	44%
Canada	38%	41%	42%	43%
United Kingdom	4%	5%	6%	5%
France	2%	2%	2%	2%
Elsewhere	4%	4%	5%	6%

Source: The Canadian Podcast Listener 2022



# AM/FM Radio Drives Business Results

AM/FM Radio connects with consumers  
on the go

**RADIO**  
CONNECTS

# AM/FM RADIO IS THE AUDIO PLATFORM OF CHOICE WHEN CANADIANS ARE ON THE GO

Canadians said they used their vehicle to do one or more of these activities yesterday	
Go grocery shopping	38%
Go to drug store / pharmacy	13%
Stop at a coffee shop	13%
Pick up food at fast-food restaurant / drive-thru	12%
Go shopping at mall / plaza	11%
Go to the bank	10%
Pick up lottery tickets	8%
Drive to casual or fine dining restaurant	8%
Stop for beer, wine or liquor	7%
Go to hardware/home improvement store	5%
Go to a movie	2%
Take your car/truck for service	2%
Visit a car/truck dealership	1%

**69%** of Canadians 18+ in vehicles yesterday were spending money

**70%** of them tuned into AM/FM Radio before making a purchase

Source: ROTM

# CANADIANS TRUST THE ADS THEY HEAR ON THE RADIO

Traditional media are the most trusted by Canadians and provide brand safe environments for advertisers to connect with consumers.

How trustworthy would you say the ads are that you may see or hear in each of the following places?	
Print newspaper or magazines	49%
Podcasts	47%
TV	47%
Online music streaming	44%
Direct mail	34%
Email advertising	22%
Online video	20%
Online banner ads	18%
Online pop-up ads	12%

**50%** of Canadians believe the ads they hear on AM/FM Radio are trustworthy

Source: ROTM

# CANADIANS RESPOND TO ADS THEY HEAR ON AM/FM RADIO

Whether listening in the car or elsewhere, have you ever taken any of the following actions after hearing a brand, product or service advertised on AM/FM Radio?

	A18+	A18-34	Index
Taken any action after hearing an ad about a product or service on the radio	32%	41%	128
Gone online to get more information about a product or service they heard advertised on the Radio	21%	21%	100
Told someone else about a product or service they heard advertised on the Radio	14%	22%	157
Purchased a product or service they heard advertised on the Radio	7%	8%	114

32%

Almost 1/3 of Canadians report taking some sort of action after hearing about a product or service advertised on the Radio

Source: ROTM

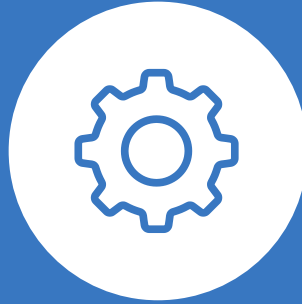
# ADDING AM/FM RADIO BOOSTS CPG SALES RESULTS



## NIELSEN MMM NORMS

---

MMM studies help  
advertisers predict ROI  
impacts



## 5 YEARS OF MMM NORMATIVE DATA

---

1,000+ observations of  
unique CDN CPG brand  
activity in TV, Radio, OOH,  
Online and Trade from 2015-  
2020



## INVESTIGATE IMPACT OF RADIO IN THE MEDIA MIX

---

Nielsen evaluated CDN  
ROI norms to understand  
how Radio advertising  
impacted ROI and  
worked in synergy with  
other media to improve  
sales volumes

# ADDING AM/FM RADIO TO CPG CAMPAIGNS RESULTS IN IMPROVED OUTCOMES

**1.3x**

Radio ROI  
outperformed  
Total Media  
ROI by 1.3x

**\$2.35**

For every \$1  
spent, Radio  
generates 2X  
the value in  
short-term  
sales

**+2%**

Total Media  
ROI is higher  
when AM/FM  
Radio is added  
to the  
mix

**+1.06%**

Increase in  
sales volume  
lift when  
AM/FM Radio  
runs in  
tandem with  
other media

Source: Nielsen Canada CPG Norms Database Analysis

# ADDING AM/FM RADIO BOOSTS CPG SALES RESULTS

**2.4X**

AM/FM Radio is more synergistic than all other media when it comes to supporting prioritized Trade Activity

**2.56%**

Increase in sales volume lift when AM/FM Radio runs in tandem with CPG Trade Activity

**28%**

Improvement to synergistic sales volume when added to other Media Tactics



# KEY TAKEAWAYS

## AM/FM RADIO HAS 74% OF BUYABLE AUDIO AUDIENCES

Canada is the 3rd largest Radio market, outperforming any audio advertising platform, reaching over 85% of Canadians each week

## AM/FM RADIO STREAMING IS BIGGER THAN FREE SPOTIFY

No digital audio or social media platform has the scale and reach of AM/FM Radio. More Canadians streamed AM/FM Radio in the past week than streamed Free Spotify

## PAID STREAMING CONTINUES TO GROW WHILE REACH OF FREE STREAMING IS DECLINING

More listeners are paying for ad-free music streaming as part of the personal music library, but free ad-supported music streaming is declining

## PODCASTING

34% of Canadians report listening to podcasts on a monthly basis with Comedy being the content of choice for 40% of podcast listeners

## AM/FM RADIO HAS 94% SHARE OF IN-CAR BUYABLE AUDIO AUDIENCES

Almost 70% of Canadians in vehicles yesterday, were on their way to spend some money and nearly 1/3 of Canadians report taking some sort of action after hearing about a product or service advertised on the Radio

## ADDING AM/FM RADIO TO CAMPAIGNS IMPROVES OUTCOMES

Adding AM/FM Radio to CPG brand activity improves Total Media ROI, increases Trade Activity synergies and results in overall improved sales outcomes

# Thank You

For more information connect with us:



**RADIO**  
CONNECTS

