

RADIO
CONNECTS

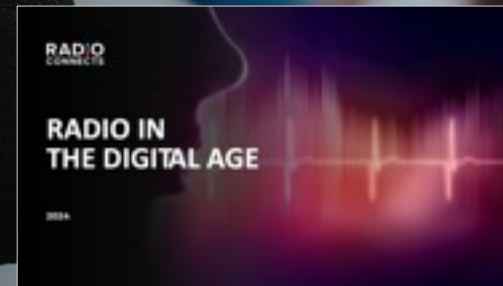
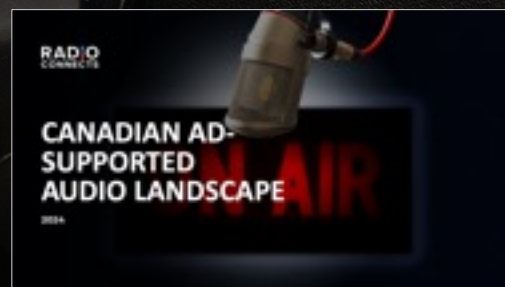
REDISCOVER THE POWER OF LIVE RADIO

2024



Whether serving a large city area or a small community, Live 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, Broadcast Radio is Free to everyone. Whether over-the-air or through a connected device, Live Radio is the only audio platform that reaches the broadest possible audiences, while still feeling personal and familiar.

The following information, will help you rediscover the power of Live Radio



**FAST FACTS
ABOUT LIVE RADIO**

2024

ON AIR
Radio

CANADIAN BROADCAST RADIO

716 COMMERCIAL RADIO STATIONS

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

Source: CRTC 2022

3RD LARGEST RADIO MARKET

According to a recent WARC
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 Global Report 2021

\$1.5 BILLION DOLLARS IN REVENUE

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

Source: CRTC 2022

LOCAL RADIO DRIVES BUSINESS

67% of Radio Revenue is
driven by local sales

Source: CRTC 2022

FAST FACTS

1

LIVE RADIO'S REACH IS UNBEATABLE

Live Broadcast Radio reaches 85% of Canadians each week and over 54% 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 Fa'23 AW TMC PPM 12+

2

LIVE RADIO'S HAS THE BIGGEST SHARE OF BUYABLE AUDIO

3 out of every 4 hours of listening to ad-supported audio is spent with Live AM/FM, which is 3X greater than podcasts and free music streaming services combined.

Source: ROTM Fall 2023

3

LIVE RADIO'S RULES THE ROAD

AM/FM Radio has 92% of the buyable audience available to reach Canadians in their cars. 9 out of 10 hours spent with ad-supported audio in the car, is spent listening to Live Radio.

Source: ROTM Fall 2023

4

CANADIANS RESPOND TO ADS THEY HEAR ON LIVE RADIO

4-in-10 Canadians have taken some sort of action after hearing an ad on Live Broadcast Radio, whether that be purchasing the product, talking about it, or going online for more information.

Source: ROTM Fall 2023

5

LIVE RADIO IS DIGITAL

Since Fall 2019, the proportion of AM/FM hours that are streamed has increased from 9% to 12%. For 18-34's, 17% of their time listening to Live Radio is to the streamed signals.

Source: ROTM Fall 2023

6

MORE CANADIANS STREAM LIVE RADIO THAN FREE SPOTIFY

For advertisers looking to reach streamers, AM/FM Radio streaming delivers more listeners than ad-supported Spotify.

Source: ROTM Fall 2023

MEASUREMENT

There are 3 different types of measurement used to generate Broadcast Radio audiences



NUMERIS Portable People Meters (PPMs)

Numeris uses a national panel of 4,560 HH; 8,700+ Canadians, shared with TV, providing passive measurement in 5 of Canada's largest cities, representing apx. 55% of the population. Data is released in 13-week cycles



NUMERIS 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



RADIOCOUNT 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



AM/FM RADIO CONTINUES TO BE THE LARGEST SOURCE OF AUDIO LISTENING FOR CANADIANS 18+

49%

A18+ SHARE OF TIME SPENT WITH LIVE RADIO

Personal Music* 35%

Free Music Streaming 11%

Podcasts 9%

Free Music Streaming 7%

Ad-supported audio platforms

*Includes ownership of physical music like CDs, vinyl or MP3s || commercial free paid streaming services and Sirius XM

Source: Radio On The Move Fall 2023

**RADIO
CONNECTS**

LIVE RADIO'S SCALE CONNECTS WITH CANADIANS EVERYWHERE

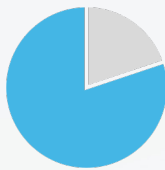
AM/FM Radio is the only audio platform that can deliver commercial messaging minute by minute, at scale



Live Radio connects with over **14.4 million** people **each week**, across the measured PPM Markets¹

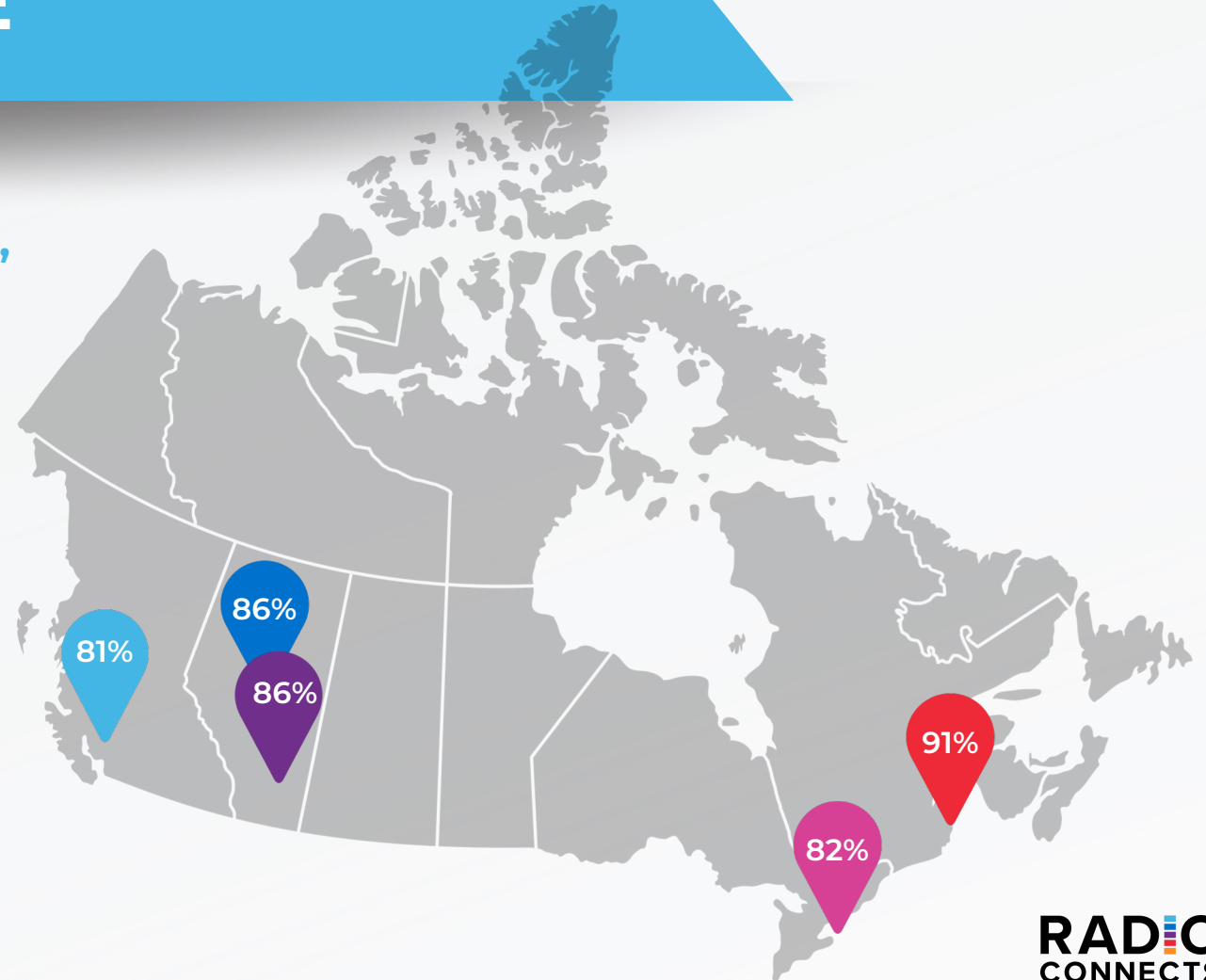


On average, that's over **682,500 people** in the PPM markets tuned into Live AM/FM Radio **each minute**¹



75%

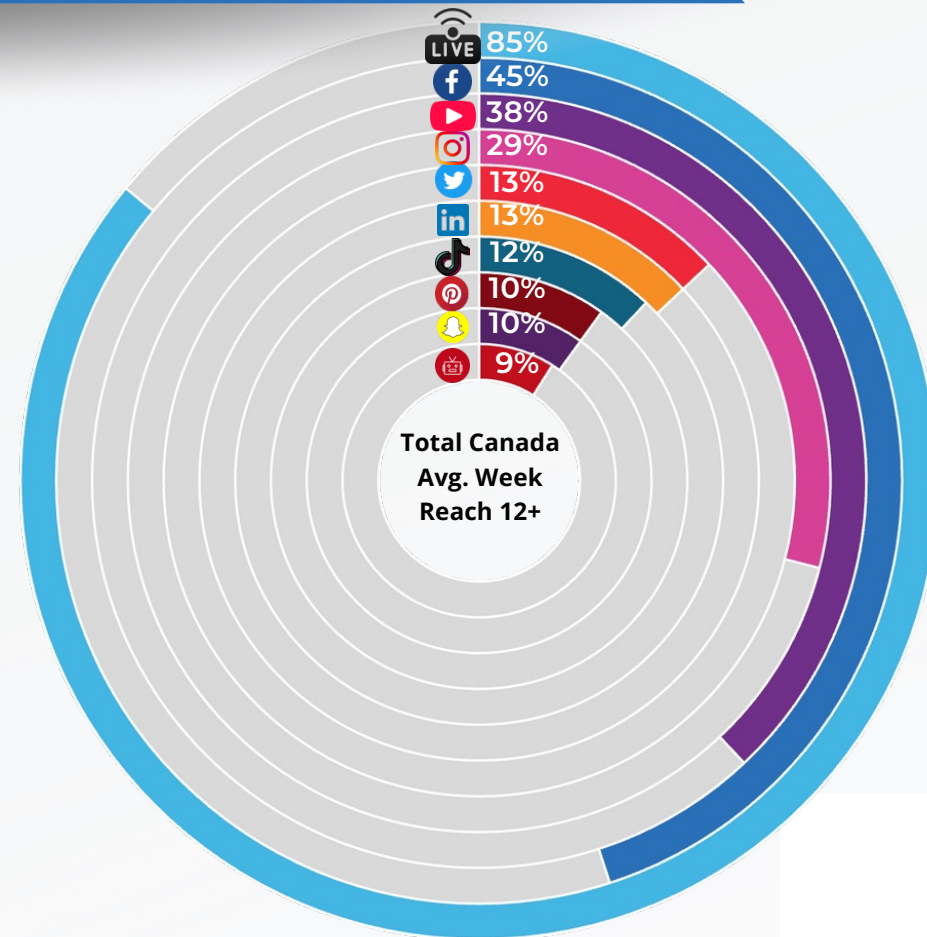
3 out of every four hours of listening to ad-supported audio is **spent tuning to Live AM/FM**, which is **3 X greater** than the combined share of **Podcasts and Free Music Streaming**²



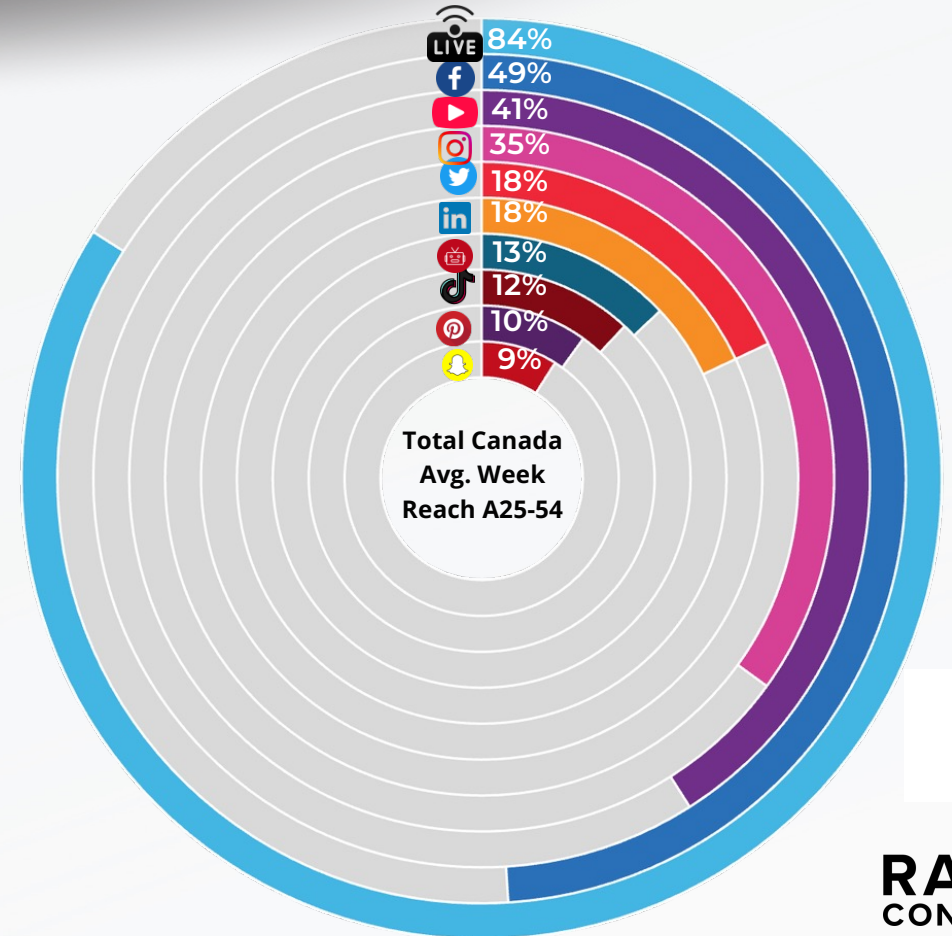
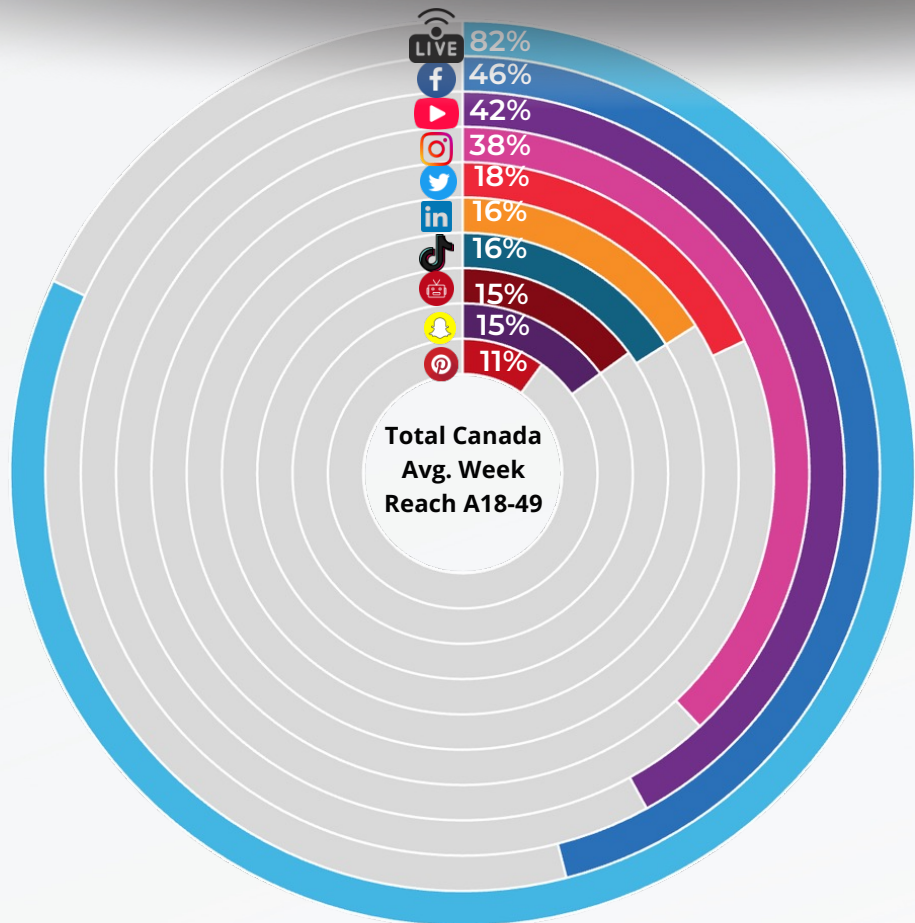
Source: 1. Numeris Fall 2023 PPM TMC AW 2+ | 2. Radio On The Move Fall 2023

LIVE BROADCAST RADIO, THE ORIGINAL MOBILE, AND STILL BIGGEST, SOCIAL MEDIA PLATFORM

REACHES MORE CANADIANS
IN ONE WEEK THAN ANY
OTHER SOCIAL MEDIA
PLATFORM

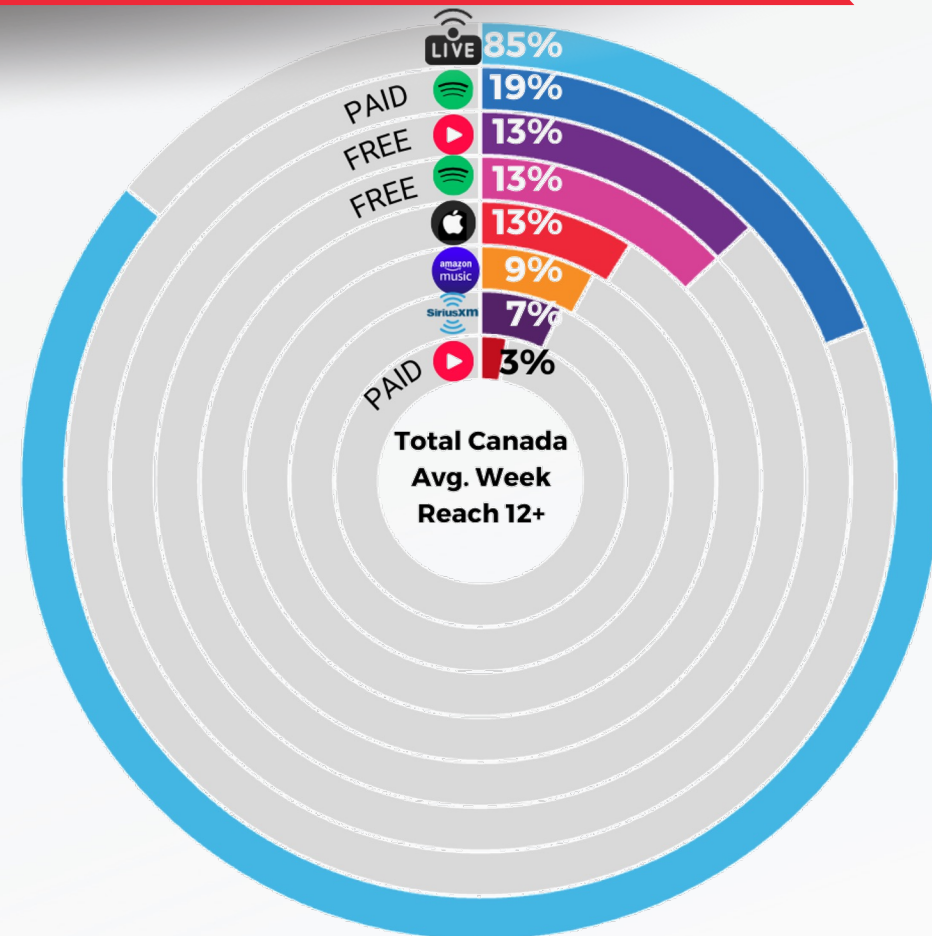


LIVE BROADCAST RADIO, THE ORIGINAL MOBILE, AND STILL BIGGEST, SOCIAL MEDIA PLATFORM

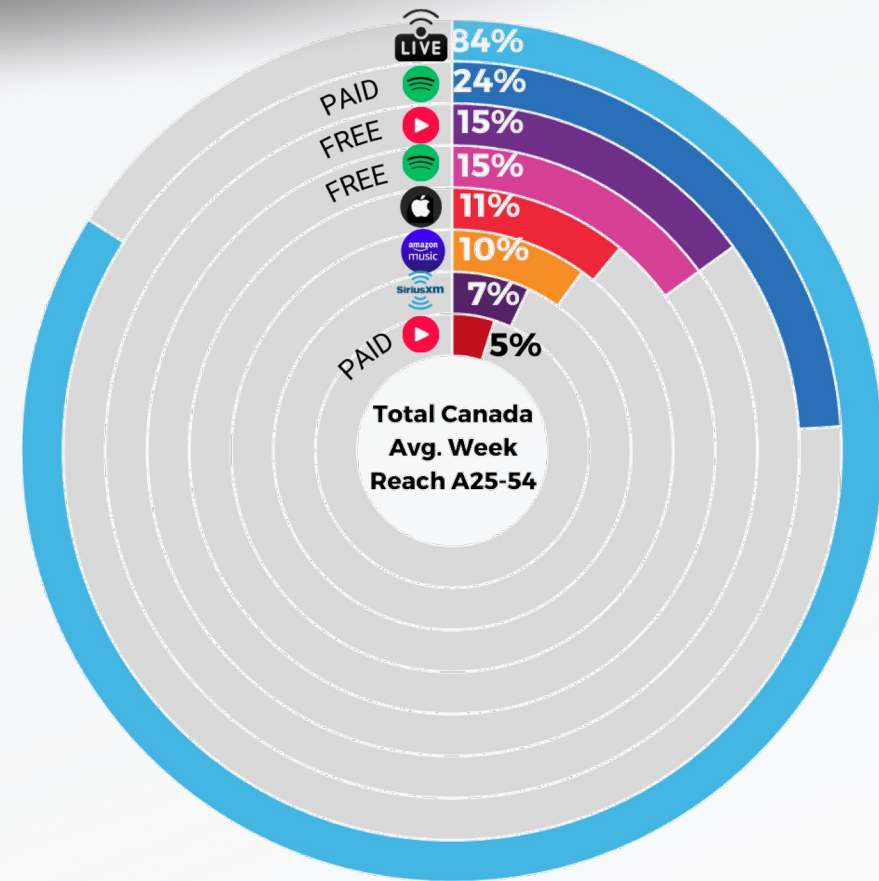
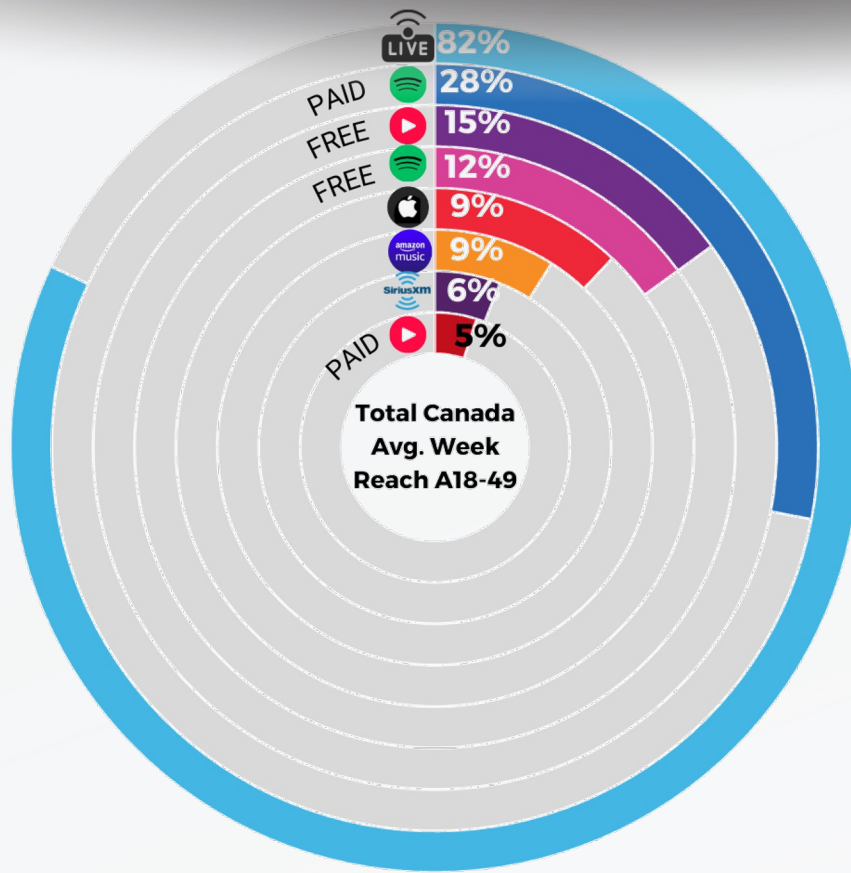


LIVE BROADCAST RADIO IS THE LARGEST AUDIO PLATFORM LISTENED TO BY CANADIANS

AND REACHES MORE CANADIANS IN ONE WEEK THAN ANY OTHER AUDIO PLATFORM



LIVE BROADCAST RADIO IS THE LARGEST AUDIO PLATFORM LISTENED TO BY CANADIANS





CANADIAN AD- SUPPORTED AUDIO LANDSCAPE

2024

ON AIR



LIVE RADIO'S SCALE DOMINATES THE AD-SUPPORTED AUDIO LANDSCAPE

Canadian adults spend 3 out of every 4 hours with Live Radio

A18+ share of time spent with ad-supported audio

75%

AM/FM
Radio

14%

Podcasts

11%

Free Music
Streaming

IN BOTH OFFICIAL LANGUAGES, LIVE RADIO HAS THE LARGEST SHARE OF AD-SUPPORTED AUDIO AUDIENCES THAT REACH CANADIAN CONSUMERS

ENGLISH

74%

AM/FM
Radio

15%

Podcasts

11%

Free Music
Streaming

FRENCH

81%

AM/FM
Radio

7%

Podcasts

12%

Free Music
Streaming

A18+ SHARE OF TIME SPENT WITH AD-SUPPORTED AUDIO



ACROSS CANADA

Live Broadcast Radio has the largest share of buyable audiences advertisers can access to reach Canadian consumers

A18+ SHARE OF TIME SPENT WITH AD-SUPPORTED AUDIO

B.C

75%

AM/FM Radio

12%

Podcasts

12%

Live Music Streaming

Alta/Man/Sask

76%

AM/FM Radio

13%

Podcasts

12%

Live Music Streaming

Ontario

69%

AM/FM Radio

20%

Podcasts

11%

Live Music Streaming

Quebec

84%

AM/FM Radio

6%

Podcasts

10%

Live Music Streaming

Atlantic

79%

AM/FM Radio

8%

Podcasts

14%

Live Music Streaming

BY MARKET SIZE

Live Broadcast Radio connects with more Canadians in cities and towns across Canada

A18+ SHARE OF TIME SPENT WITH AD-SUPPORTED AUDIO

Small/Rural Sized Cities

(Pop= under 100K)

79%

AM/FM Radio

10%

Podcasts

11%

Live Music Streaming

Medium Sized Cities

(Pop=100-499K)

73%

AM/FM Radio

13%

Podcasts

14%

Live Music Streaming

Other Large Cities

(Pop=500K+)

76%

AM/FM Radio

16%

Podcasts

7%

Live Music Streaming

Tor/Mtl/Van

73%

AM/FM Radio

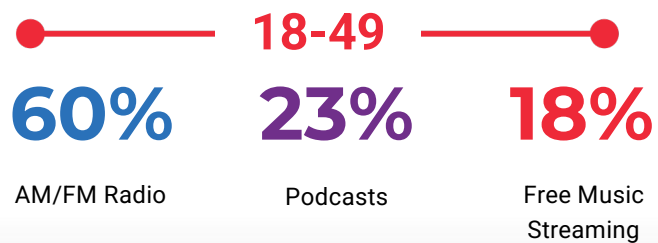
13%

Podcasts

13%

Live Music Streaming

IN KEY BUYING DEMOGRAPHICS, LIVE RADIO COMMANDS THE LARGEST SHARE OF AD-SUPPORTED AUDIO LISTENING

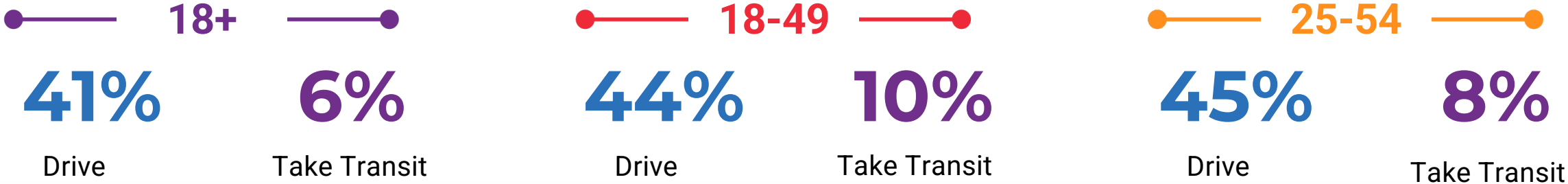


A18+ SHARE OF TIME SPENT WITH AD-SUPPORTED IN-CAR AUDIO

Source: Radio On The Move Fall 2023



MORE CANADIANS DRIVE THAN TAKE TRANSIT, AND MOST ARE LISTENING TO LIVE RADIO DURING THEIR COMMUTE



Source: Radio On The Move Fall 2023

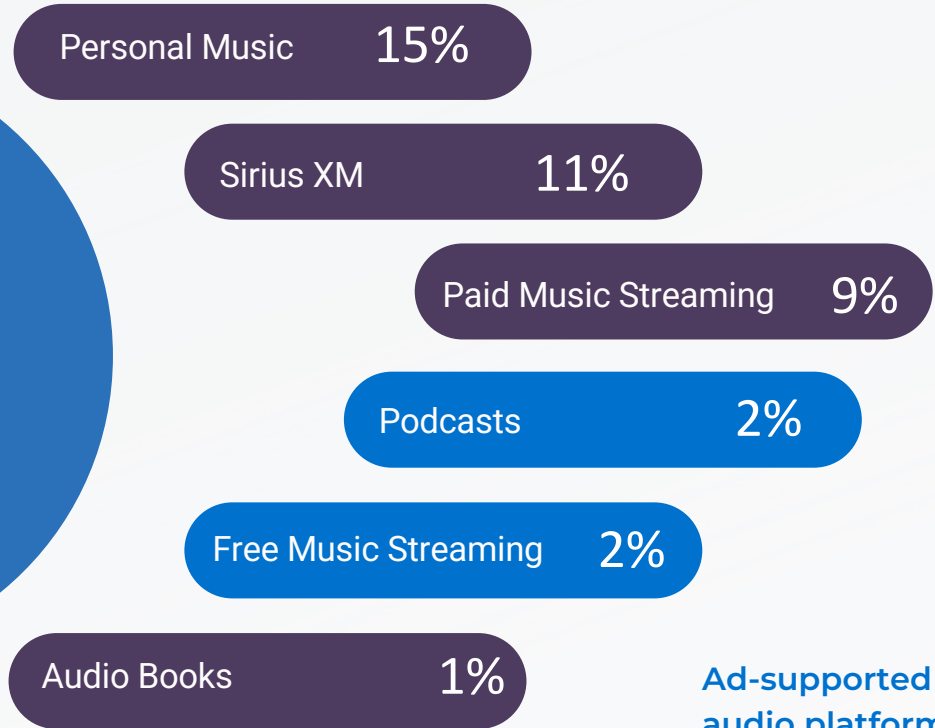




BROADCAST RADIO IS IN THE DRIVER'S SEAT FOR IN-CAR AUDIO

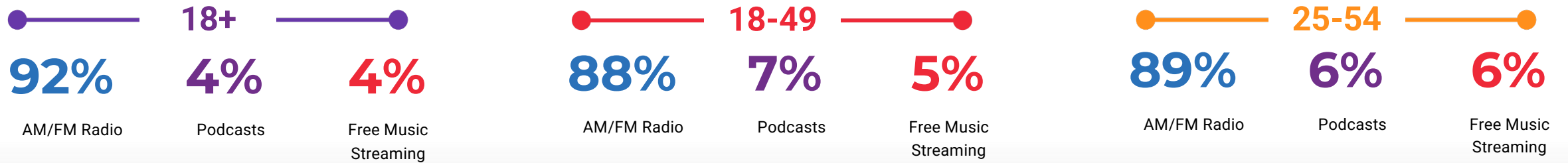
59%

A18+ SHARE OF
TIME SPENT WITH
IN-CAR AUDIO



Ad-supported
audio platforms

LIVE RADIO IS THE CLEAR IN-CAR AUDIO OPTION FOR ADVERTISERS LOOKING TO REACH CANADIANS ON THE GO



A18+ SHARE OF TIME SPENT WITH AD-SUPPORTED IN-CAR AUDIO

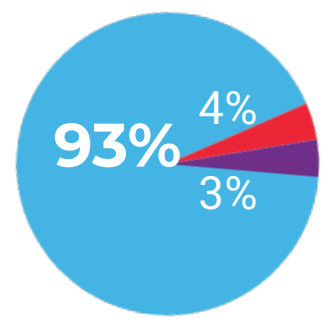
Source: Radio On The Move Fall 2023



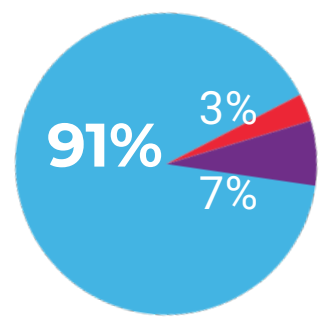


EVEN IN CONNECTED CARS, LIVE RADIO DOMINATES

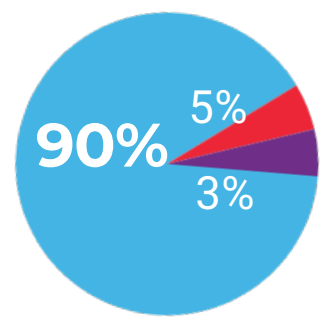
In cars with the latest technologies, Broadcast Radio delivers an overwhelming majority of time spent with ad-supported audio



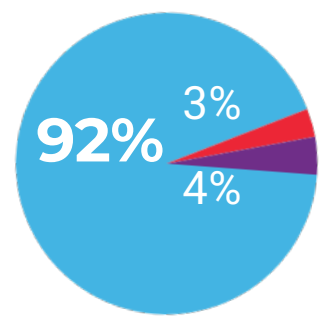
Total



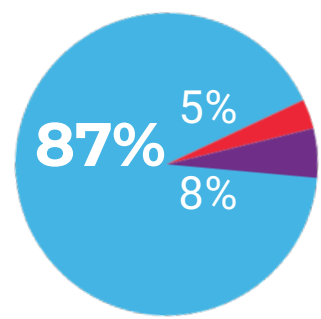
Built-in WiFi



Bluetooth



Android Auto



Apple CarPlay

Source: Radio On The Move Fall 2023

LIVE RADIO REACHES CANADIANS WHEN THEY ARE ON THE MOVE, AND ACTIVELY SPENDING

67%

of Canadians used their vehicle to engage in some form of shopping activity yesterday

69%

were reached by an advertising message because they were listening to Live Radio on their way



The logo for Radio Connects, featuring the word "RADIO" in a bold, white, sans-serif font above the word "CONNECTS" in a smaller, white, sans-serif font. The letter "I" in "RADIO" is replaced by a vertical bar with a color gradient from blue at the top to red at the bottom.

RADIO
CONNECTS

A dark silhouette of a person's head in profile, facing right, with their mouth open as if speaking. The background is a gradient of dark purple to red, with a glowing audio waveform pattern overlaid on the right side.

RADIO IN THE DIGITAL AGE

2024

MUSIC STREAMERS ARE HEAVY LIVE RADIO LISTENERS BECAUSE THEY LIKE AUDIO CONTENT

80%

of Canadians who stream music daily listen to Live Radio

16%

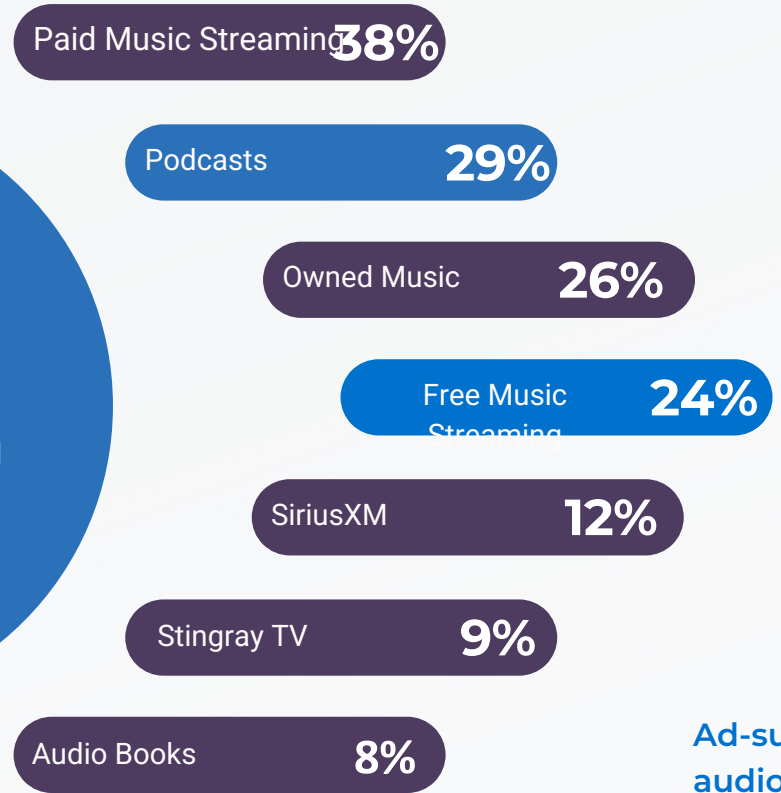
say they listen to Live Radio for more than 2 hours a day





LIVE RADIO IS THE DOMINANT AUDIO PLATFORM TO REACH CANADIANS WITH AN AUDIO MESSAGE

84%
Avg. wkly reach
A25-54*



Ad-supported audio platforms

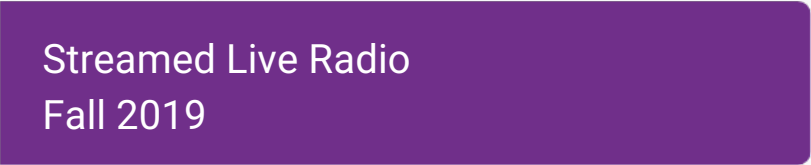


Source: Radio On The Move Fall 2023 | * PPM FL 2023 Total Meter CTRL / AW / Weekly Reach %



12% OF A18+ LISTENING TO LIVE RADIO IS NOW DONE BY TUNING TO BROADCAST RADIOS' DIGITAL STREAMS - THIS INCREASES TO 17% AMONG A18-34

Share of listening to Streamed Live Radio is up by 33% since Fall 2019



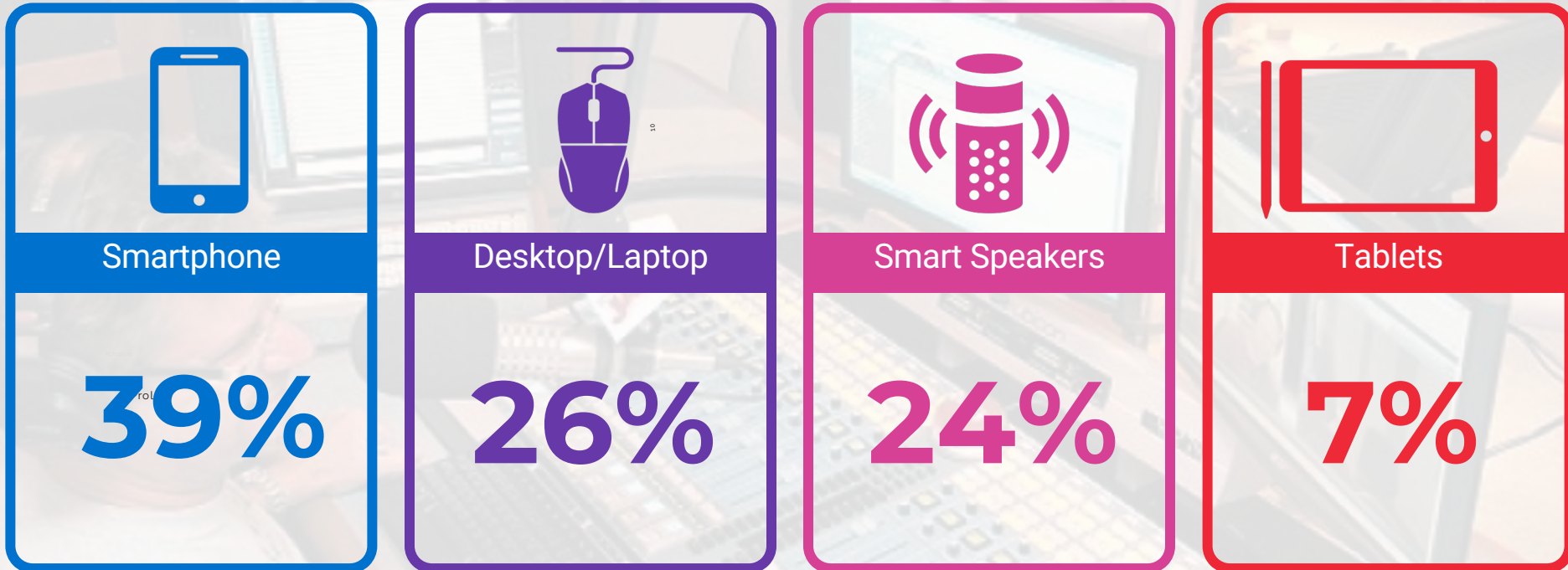
9%



12%

Source: Radio On The Move Fall 2023

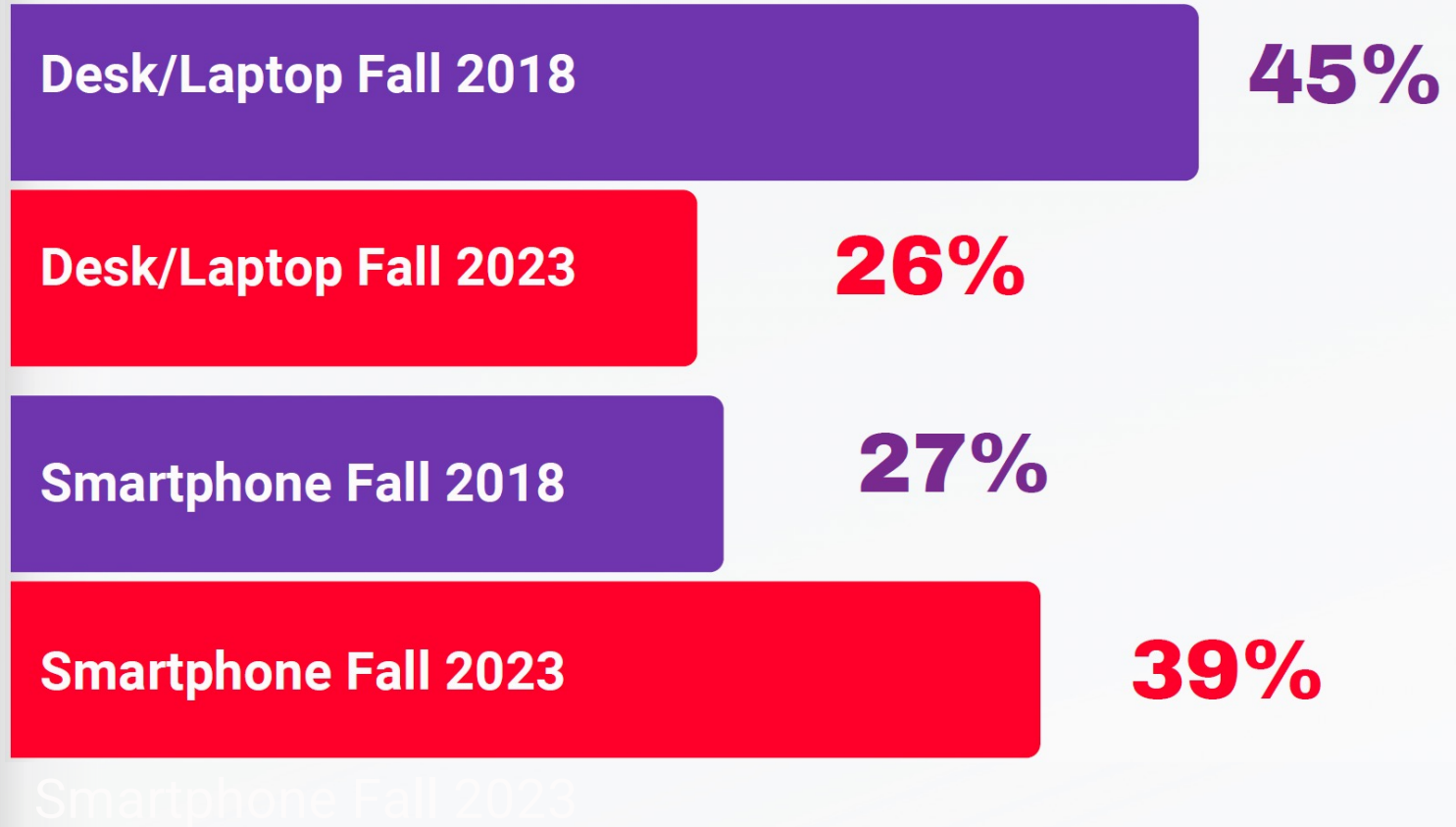
STREAMING LIVE RADIO BY DEVICE



Among A18+ who streamed Live Radio past week

Source: Radio On The Move Fall 2023

SMARTPHONES ARE REPLACING COMPUTERS FOR STREAMING LIVE RADIO



(Among 18+ who streamed AM/FM in the past week)

Source: Radio On The Move Fall 2023

40% MORE CANADIANS 25-54 ARE STREAMING LIVE BROADCAST RADIO VS. STREAMING FREE SPOTIFY

A25-54
streamed past week

14%

of Canadians streamed Live Broadcast Radio in the past week

A25-54
streamed past week

10%

of Canadians streamed Free Spotify in the past week

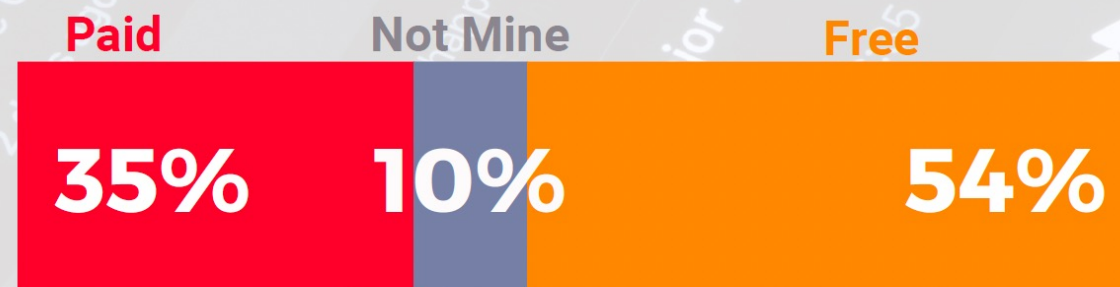


PURE PLAY PLATFORMS ARE REPLACING “OWNED” MUSIC LIBRARIES

% of Spotify Daily Users 2017 vs 2023

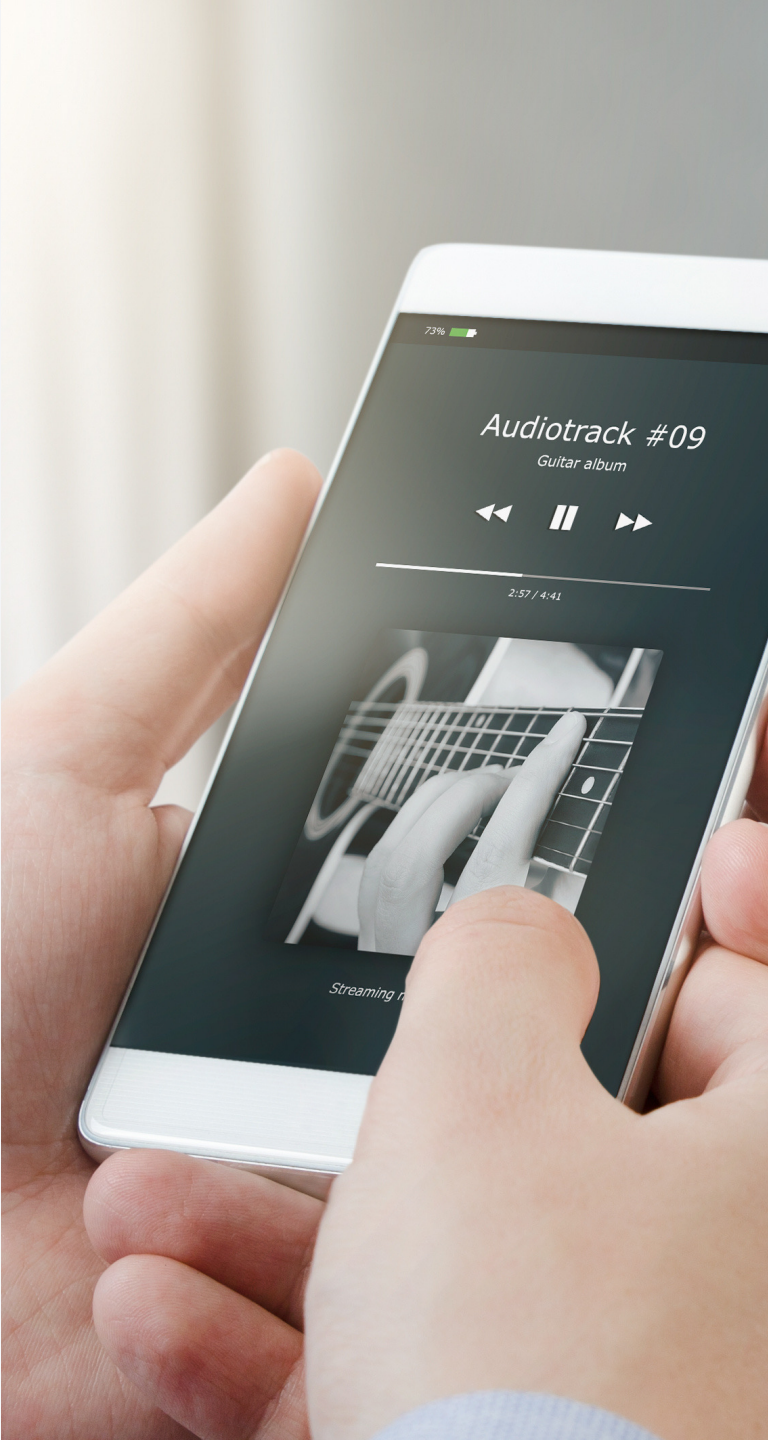
Since its launch, Spotify users continue to migrate to the Paid platform, as Canadians move to renting versus owning their personal music libraries.

Fall 2017

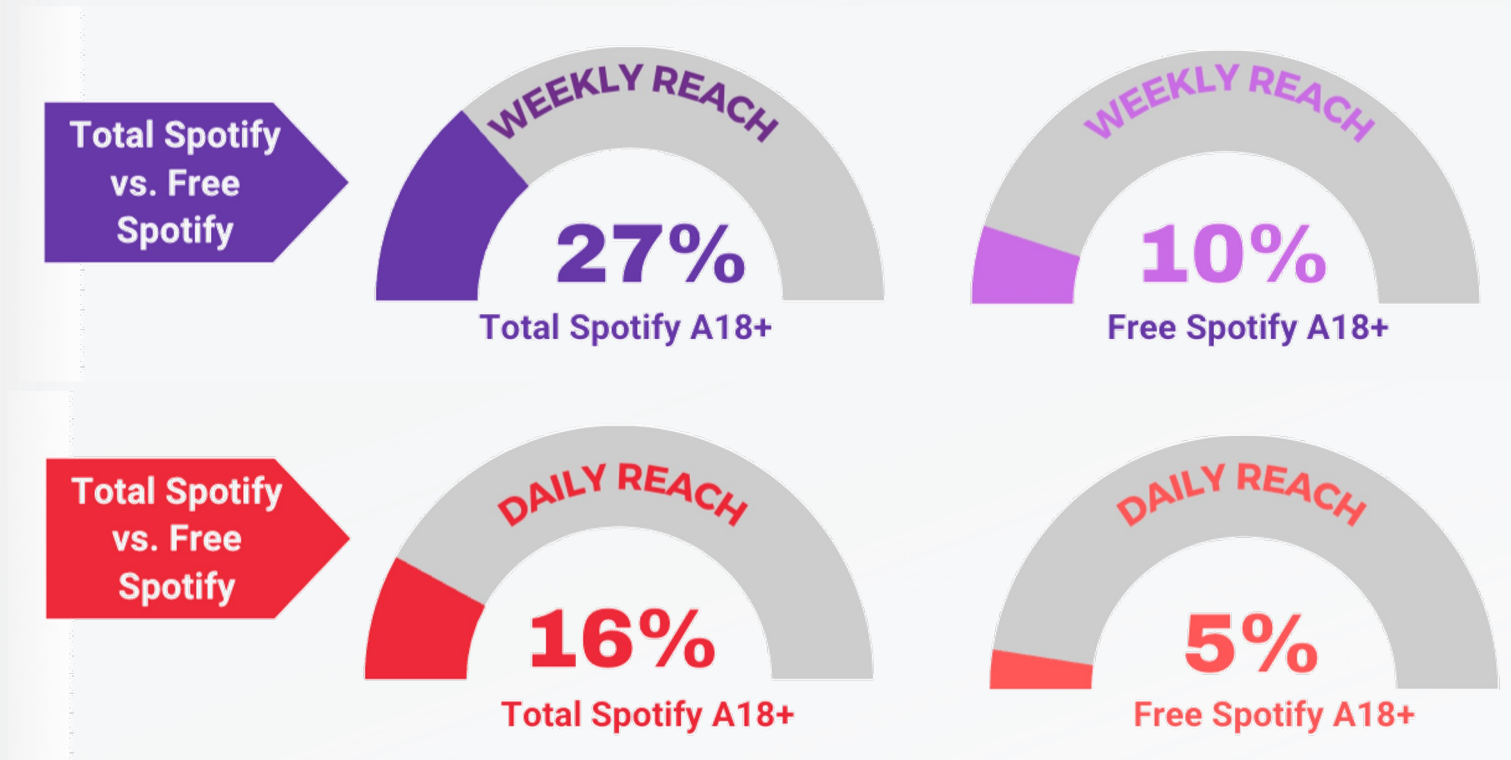


Fall 2023





REACH FOR AD-SUPPORTED SPOTIFY IS A FRACTION OF SPOTIFY'S TOTAL AUDIENCE



Source: Radio On The Move Fall 2023

ACROSS ALL DEMOS, LIVE RADIO PROVIDES SIGNIFICANTLY HIGHER EXCLUSIVE WEEKLY REACH THAN FREE SPOTIFY

AM/FM Radio **57%**
Free Spotify **4%**



AM/FM Radio **51%**
Free Spotify **6%**



AM/FM Radio **46%**
Free Spotify **7%**



AM/FM Radio **39%**
Free Spotify **10%**



RADIO HAS CONSIDERABLY HIGHER EXCLUSIVE WEEKLY REACH THAN PODCASTS



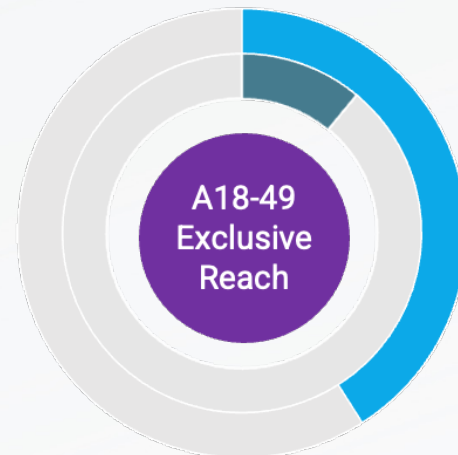
AM/FM Radio **53%**
Podcasts **7%**



AM/FM Radio **45%**
Podcasts **9%**



AM/FM Radio **41%**
Podcasts **11%**

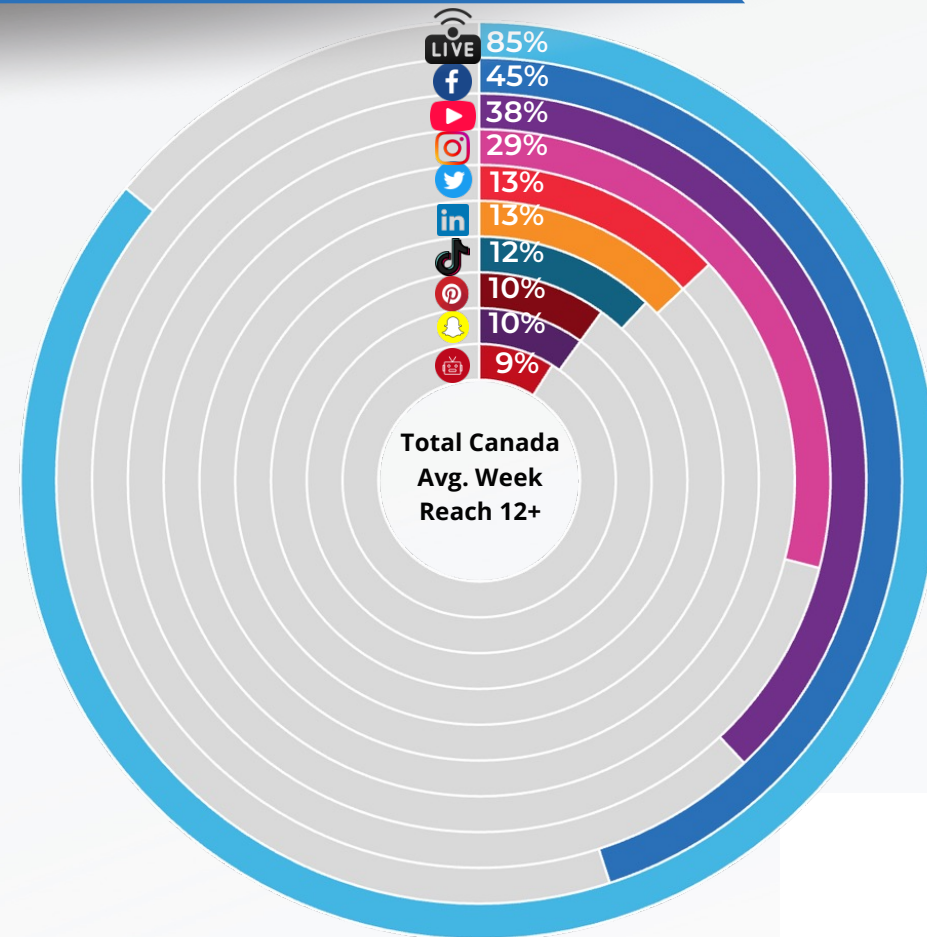


AM/FM Radio **33%**
Podcasts **12%**

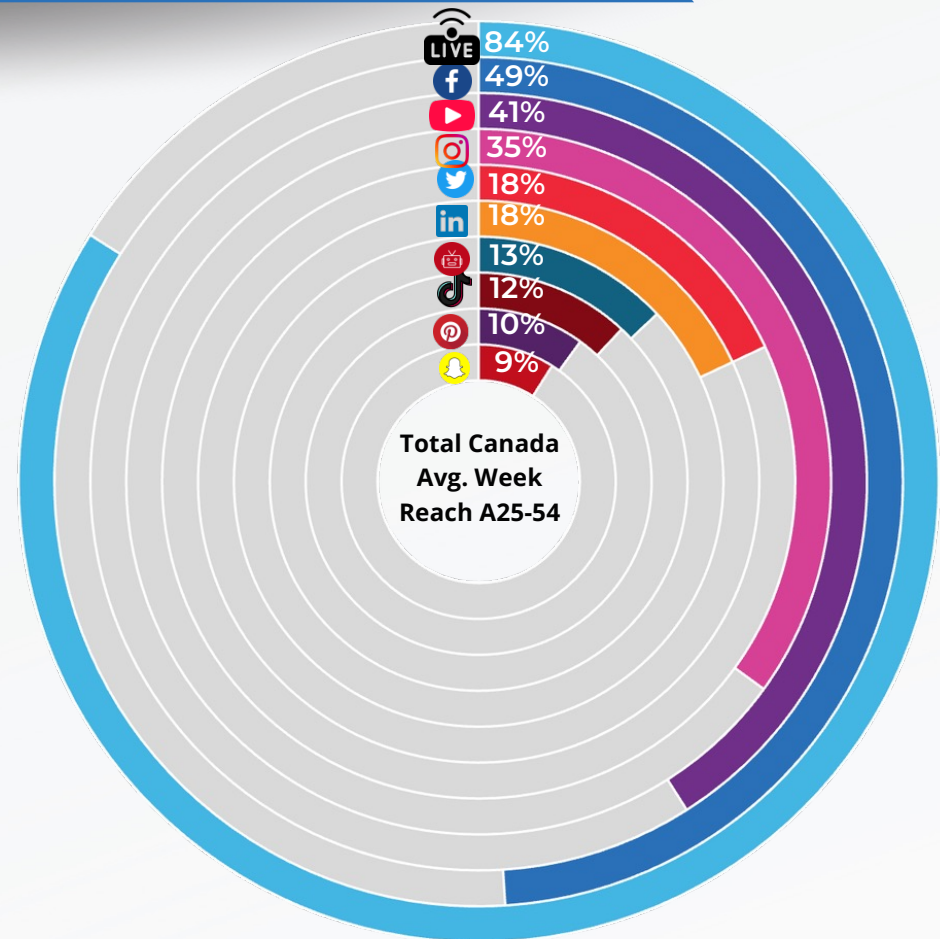
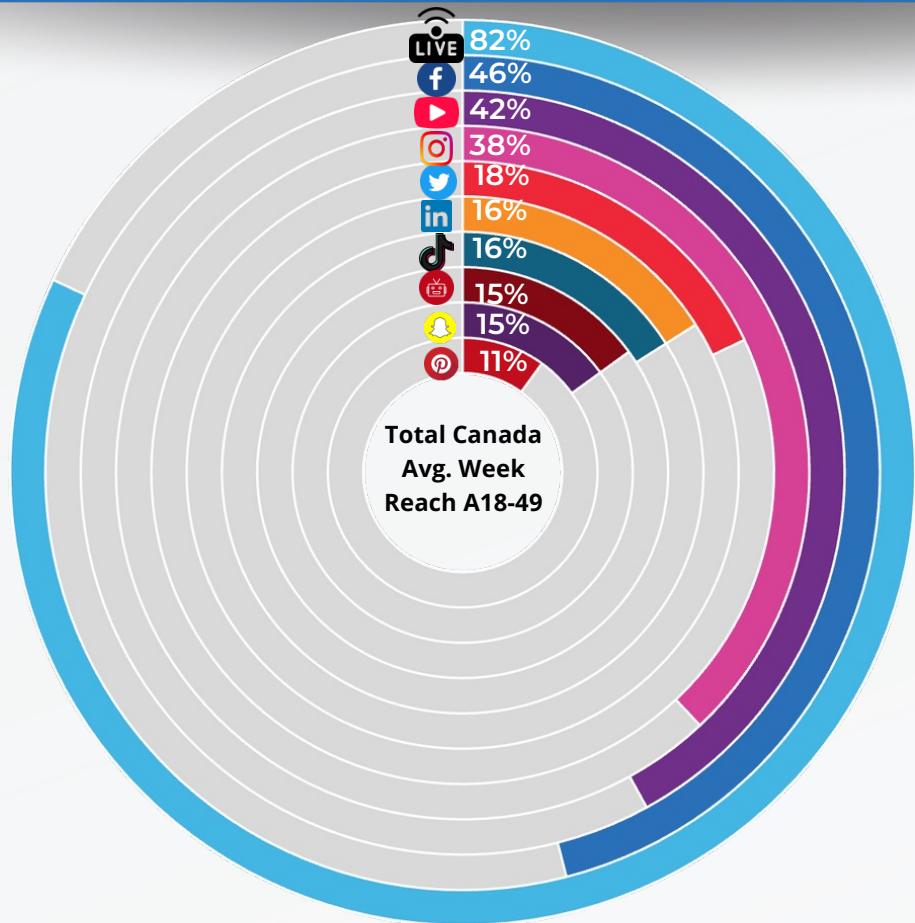


LIVE BROADCAST RADIO, THE ORIGINAL MOBILE, AND STILL BIGGEST, SOCIAL MEDIA PLATFORM

REACHES MORE CANADIANS
IN ONE WEEK THAN ANY
OTHER SOCIAL MEDIA
PLATFORM

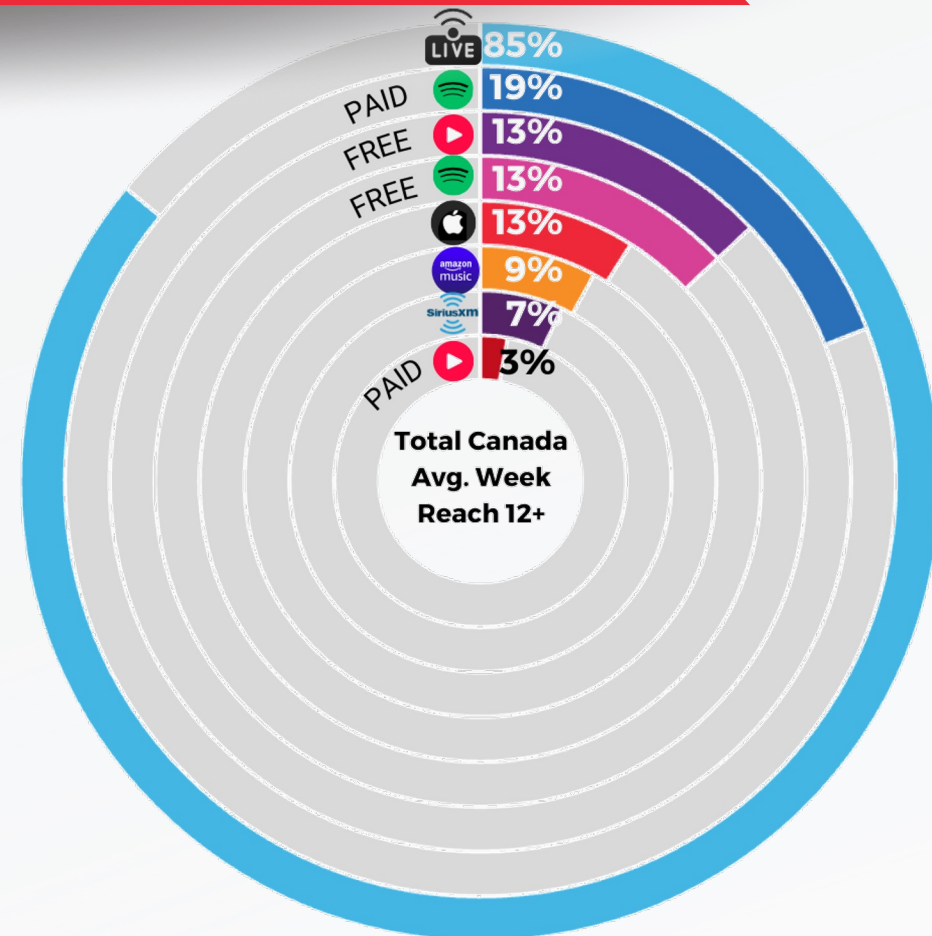


LIVE BROADCAST RADIO, THE ORIGINAL MOBILE, AND STILL BIGGEST, SOCIAL MEDIA PLATFORM

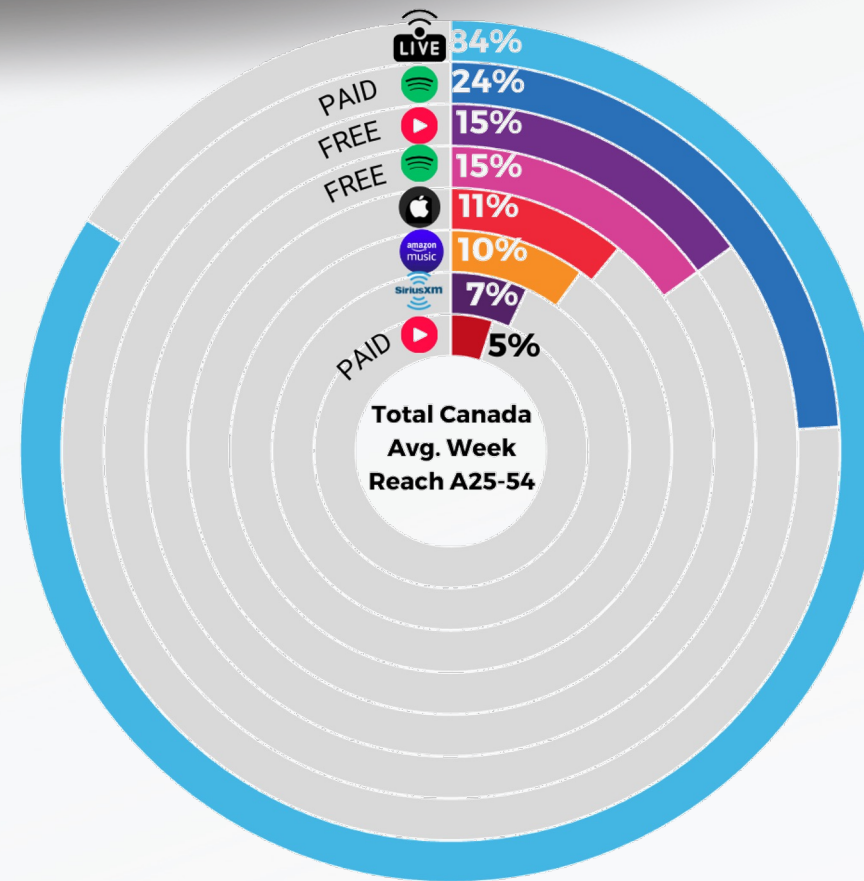
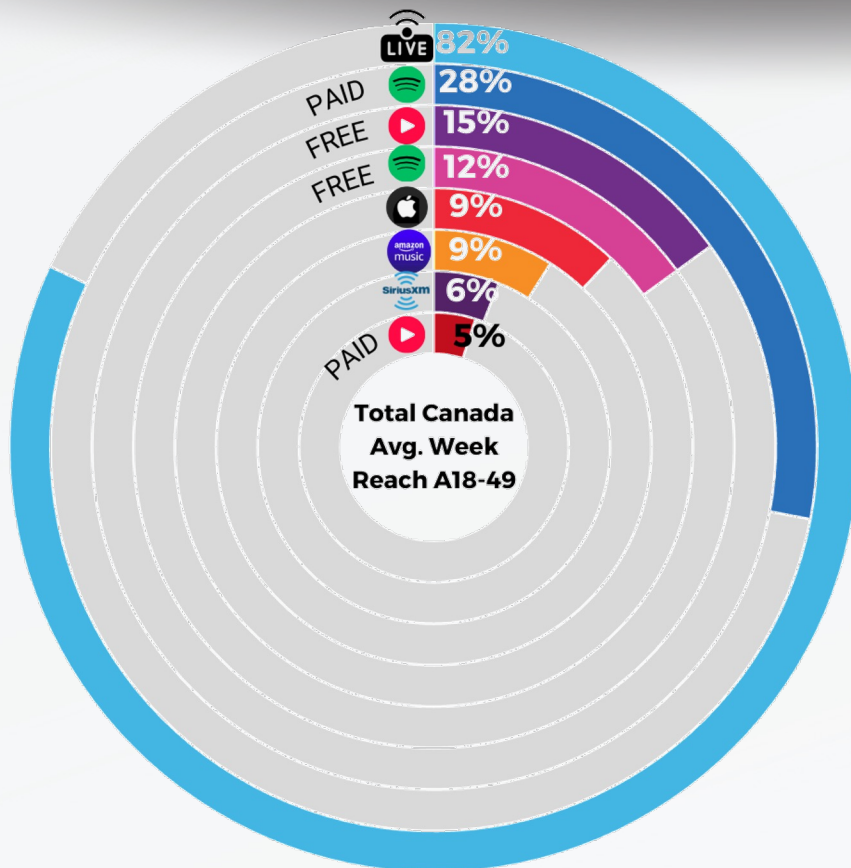


LIVE BROADCAST RADIO IS THE LARGEST AUDIO PLATFORM LISTENED TO BY CANADIANS

AND REACHES MORE CANADIANS IN ONE WEEK THAN ANY OTHER AUDIO PLATFORM



LIVE BROADCAST RADIO IS THE LARGEST AUDIO PLATFORM LISTENED TO BY CANADIANS



**RADIO
CONNECTS**

MOXIE'S
GRILL BAR

ZARA

IMAGINATION

Indigo

Books • Gifts • Life

LIVE RADIO CONNECTS WITH CONSUMERS ON THE GO

2024

LIVE RADIO REACHES CANADIANS WHEN THEY ARE ON THE MOVE, AND ACTIVELY SPENDING

67%

of Canadians used their vehicle to engage in some form of shopping activity yesterday

69%

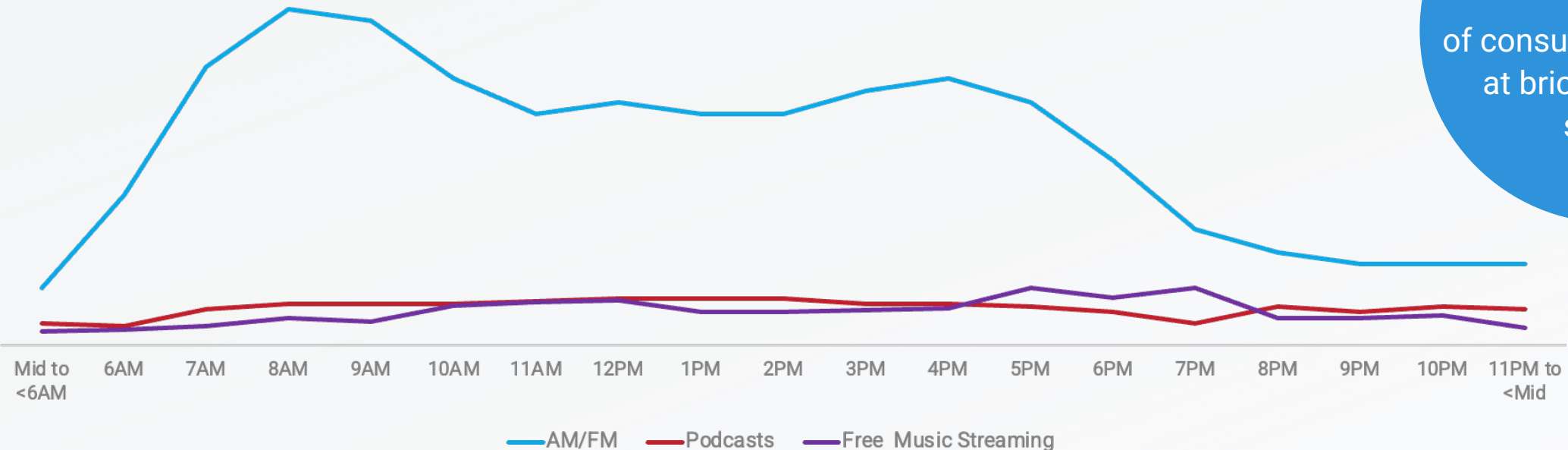
of these shoppers were reached by an advertising message because they were listening to Live Radio on their way



LIVE RADIO HAS THE LARGEST BUYABLE AUDIENCES THROUGHOUT THE DAY

When stores are open, Live Radio is on

18+ Usage Mon-Sun



94%
of consumer spending is
at brick-and mortar
stores*.

Source: Radio On The Move Fall 2023 | <https://www150.statcan.gc.ca>: On a seasonally adjusted basis, retail e-commerce sales were down 1.5% to \$3.9 billion in November 2023, accounting for 5.8% of total retail trade, compared with 5.9% in October.



AFTER HEARING AN AD ON LIVE RADIO...

41%

of Canadians
took some
action

26%

went online to
get more information
about it

21%

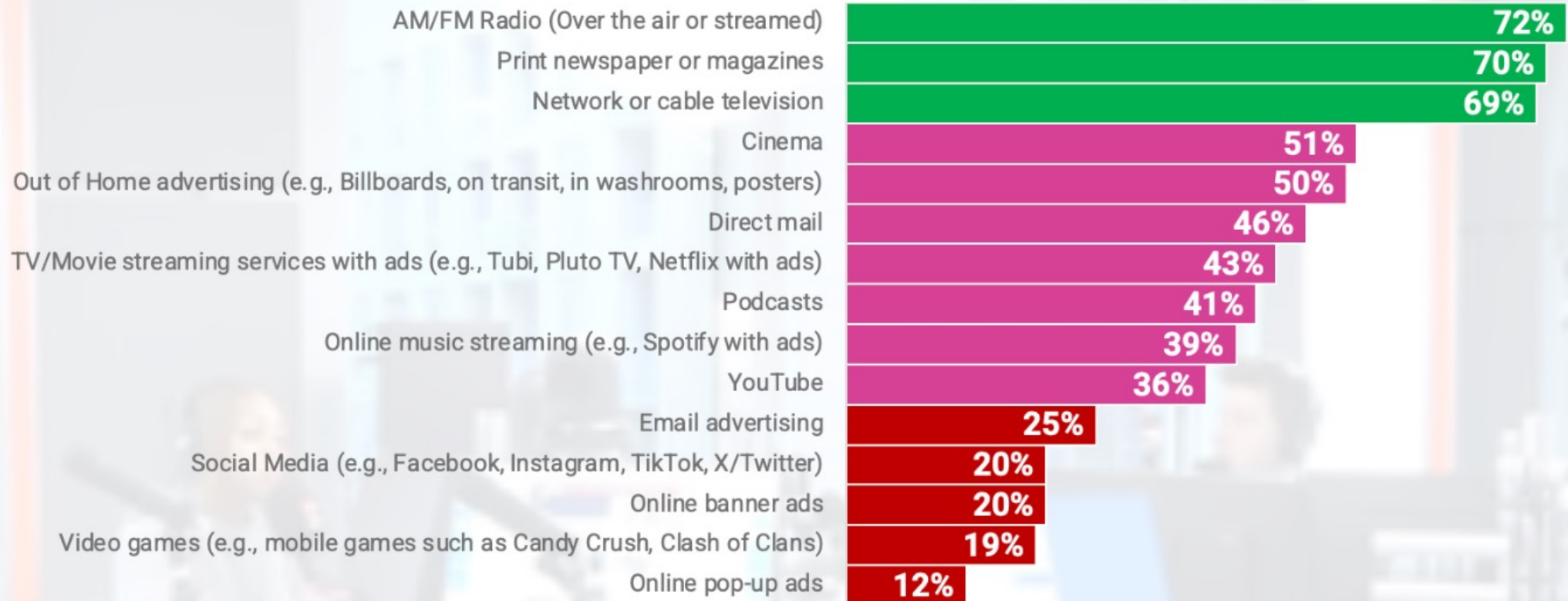
told someone
else about it

10%

purchased
a product or service
they heard
advertised

RADIO ADS ARE TRUSTED BY CANADIANS

% of Canadians who would expect to find trustworthy ads on each media



Source: Radio On The Move Fall 2023

BADE

BETWEEN THE INFORMATION AND THE ADVERTISEMENTS, CANADIANS KEEP INFORMED WITH LIVE RADIO

In the past couple of months, while listening to AM/FM Radio...

45%

A18-49

Learned new information about community events, as well about new or familiar products

32%

A25-54

Learned about an event happening in their areas (concert, festivals or community events)

22%

A18-34

Learned about new product or service they were previously unaware of

CANADIANS VALUE BEING KEPT UP TO DATE

74%

Canadians 18+ say they try to keep up with local news

59%

Canadians 18+ say they enjoy finding out about new restaurants and business in their area

45%

Canadians say they like to support local musicians and artists

BRANDS THAT SUPPORT LOCAL BUSINESSES BY ADVERTISING ON LOCAL MEDIA ARE APPRECIATED BY CANADIAN CONSUMERS

52%

of Canadians 18+ appreciate when brands support local media with their advertising dollars

Source: Radio On The Move Fall 2023



RADIO
CONNECTS

LIVE RADIO CONNECTS WITH NATIONAL BRANDS

NIELSEN CANADA CPG STUDY

NIELSEN MMM NORMS

MMM Norms help
advertisers predict
ROI impacts

5 YEARS OF MMM NORMATIVE DATA

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

INVESTIGATE IMPACT OF RADIO ON 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 LIVE RADIO TO CPG CAMPAIGNS IMPROVES OUTCOMES

1.3X

Radio ROI

Outperformed Total Media ROI 1.3 Times

+2%

When Radio Is Added

Total Media ROI improves by 2% when Live Radio is added to the media mix

\$2.35

Generated Sales

For every \$1 spent, Radio generated over twice the value in short term sales

+1.06%

Sales Volume Lift

Increase in sales volume lift when Live Radio runs in tandem with other media

Source: Nielsen Canada CPG Norms Database Analysis

LIVE RADIO BOOSTS CPG SALES RESULTS

2.4X

Live Radio is more synergistic in supporting prioritized Trade Activity than any other medium

2.6%

Increase in sales volume lift when Live Radio runs in tandem with CPG Trade Activity

28%

Improvement to synergistic sales volume when Live Radio is added to other media tactics



KEY TAKEAWAYS

LIVE RADIO IS THE CENTERPIECE FOR AUDIO

Broadcast Radio represents a 75% share of the ad-supported audio landscape, which is 3 x greater than the combined share of podcasts and free music streaming

BROADCAST RADIO DOMINATES IN-CAR TUNING

9 out of 10 minutes with ad-supported in-car audio is spent with Live Radio

LIVE RADIO HAS MORE STREAMERS THAN FREE SPOTIFY

AM/FM Radio streaming is a growing percentage of Live Radio listening while fewer Spotify listeners are using the ad-supported version

LIVE RADIO REACHES MORE CANADIANS THAN ANY SOCIAL MEDIA OR AUDIO PLATFORM

No other ad-supported audio platform can connect with more Canadian consumers than Live Radio

LIVE RADIO REACHES “ON-THE-GO” AUDIENCES

2/3rds of Canadians in private vehicles yesterday were “out and about” spending money and MOST were listening to AM/FM Radio

CONNECT FOR MORE INFORMATION



radioconnects.ca



Follow us on LinkedIn



Sign up for our regular audio updates



caroline.gianias@radioconnects.ca



lisa.dillon@radioconnects.ca



chantal.leblanc@radioconnects.ca