

**RADIO**  
CONNECTS

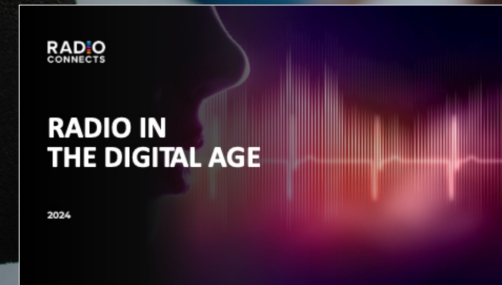
# REDISCOVER THE POWER OF LIVE RADIO

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. Based on weekly measurement using the online diary, excluding the last week of January, first week of July, and last week of December. Surveys are typically 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

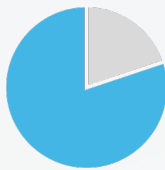
AM/FM Radio is the only audio platform that can deliver commercial messaging minute by minute, at scale



Live Radio connects with over **14.4 million** people **each week**, across the measured PPM Markets<sup>1</sup>

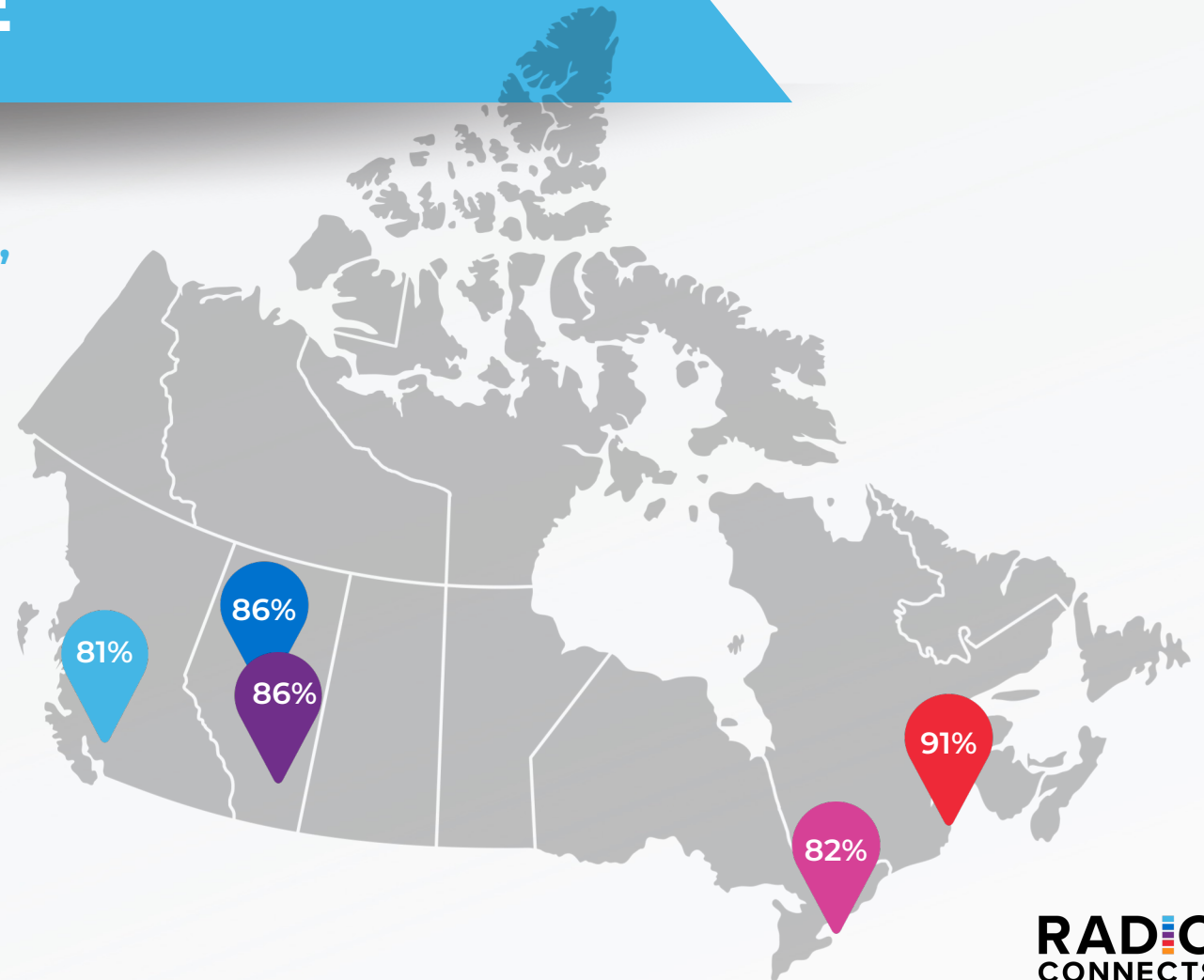


On average, that's over **682,500 people** in the PPM markets tuned into Live AM/FM Radio **each minute**<sup>1</sup>



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**<sup>2</sup>

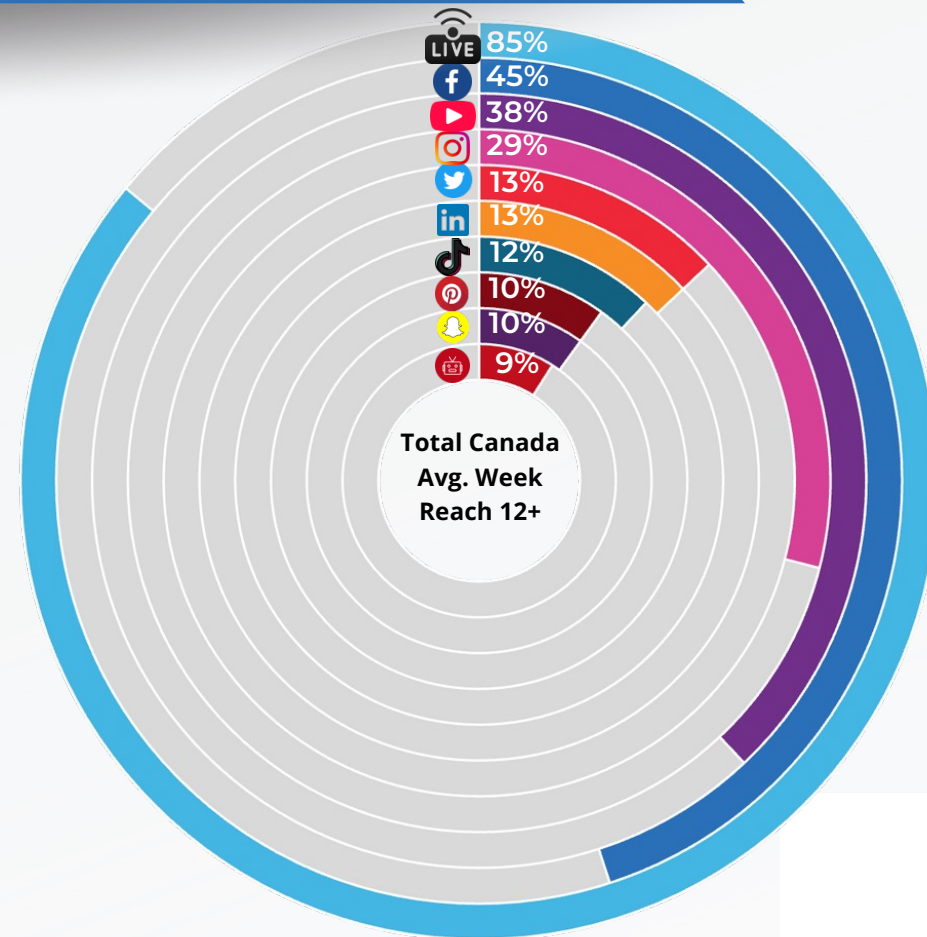


Source: 1. Numeris Fall 2023 PPM TMC AW 2+ | 2. Radio On The Move Fall 2023

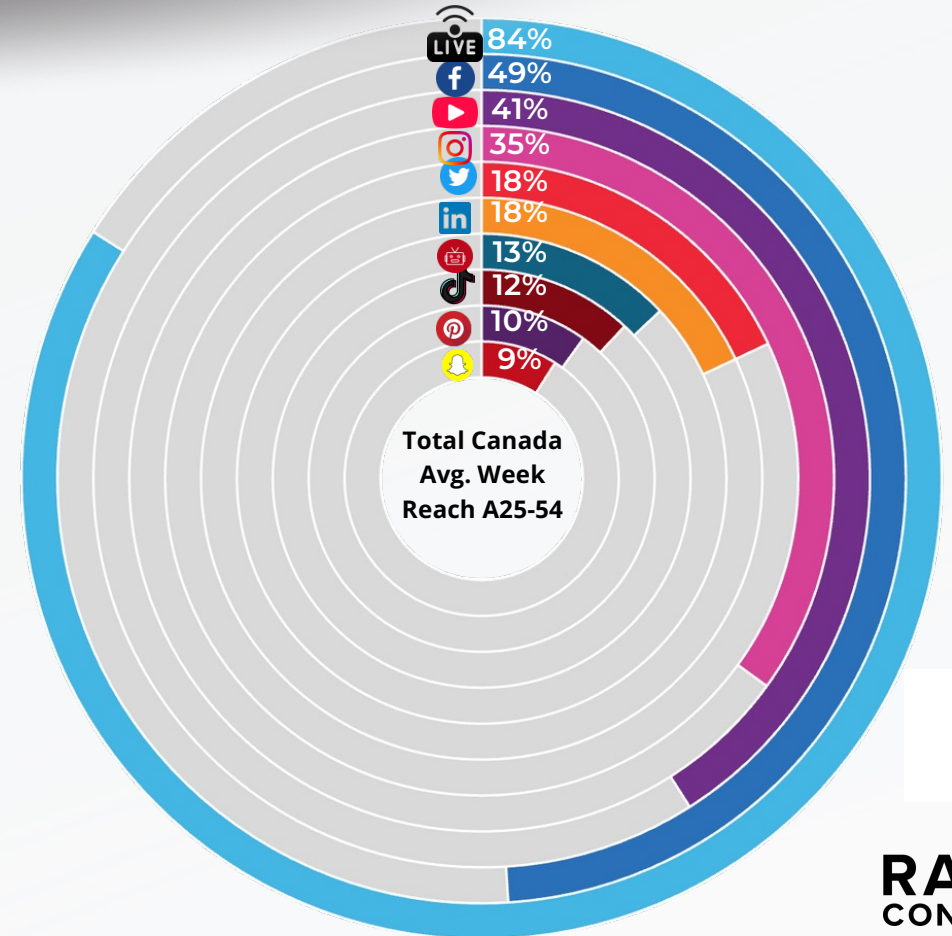
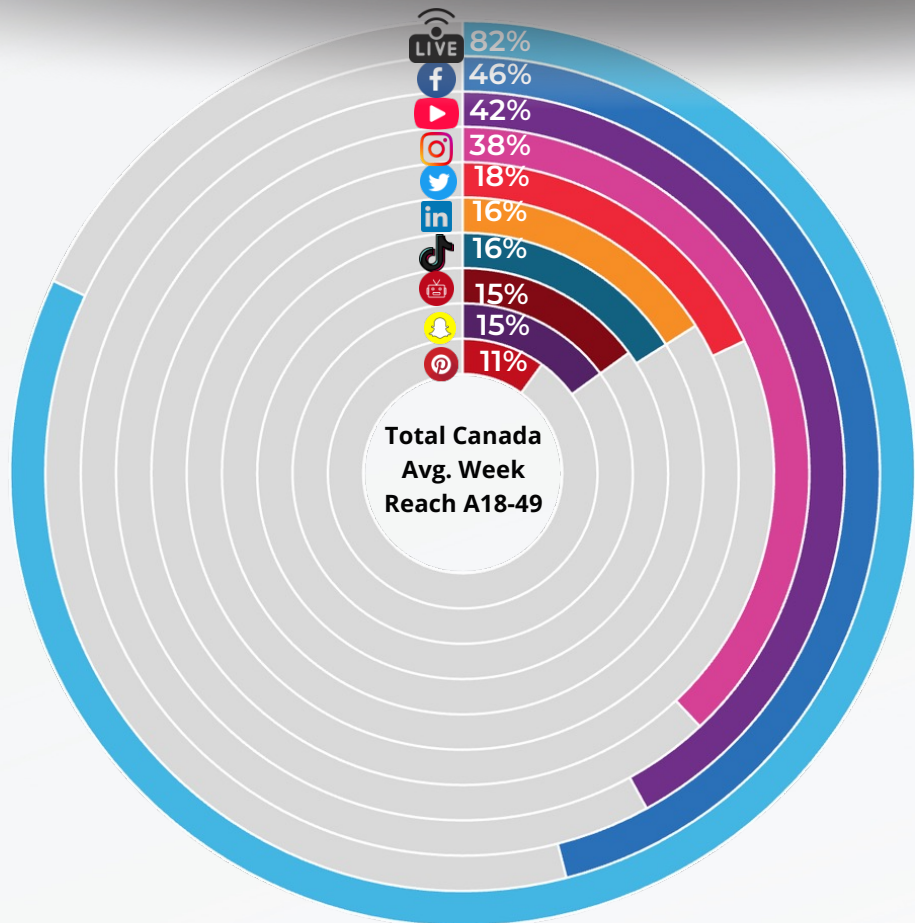


# LIVE BROADCAST RADIO, THE ORIGINAL MOBILE, AND STILL BIGGEST, SOCIAL MEDIA PLATFORM

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

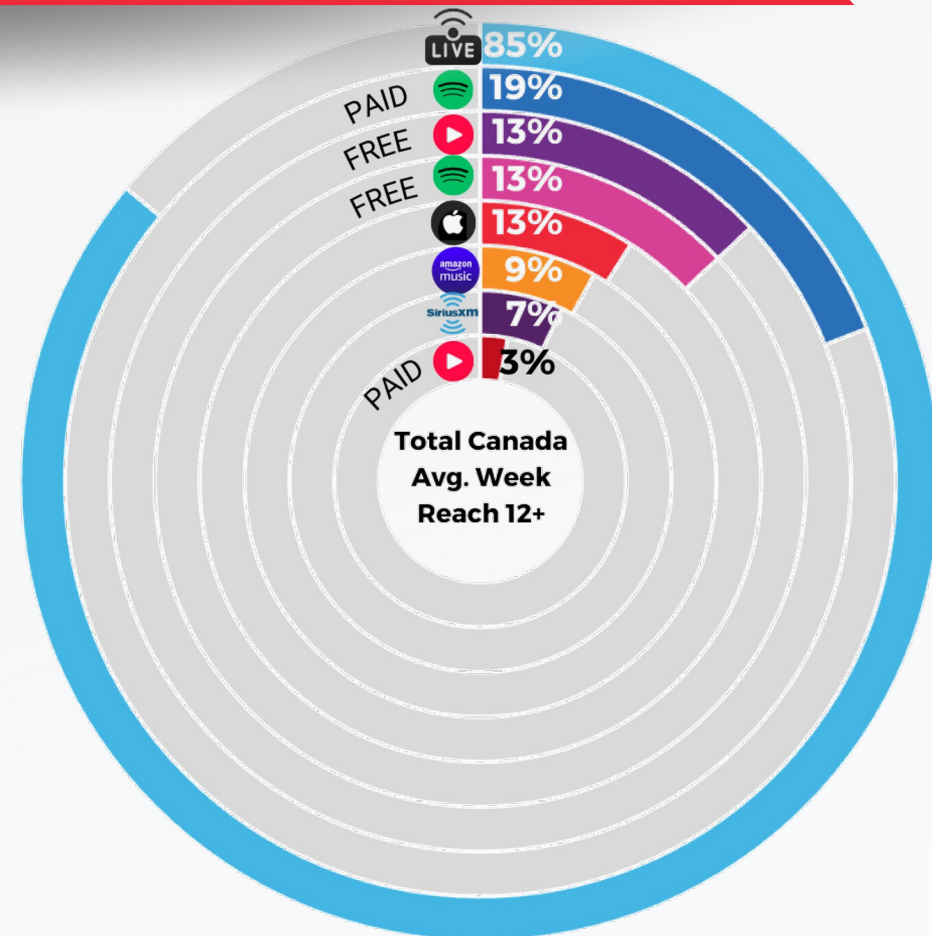


# LIVE BROADCAST RADIO, THE ORIGINAL MOBILE, AND STILL BIGGEST, SOCIAL MEDIA PLATFORM

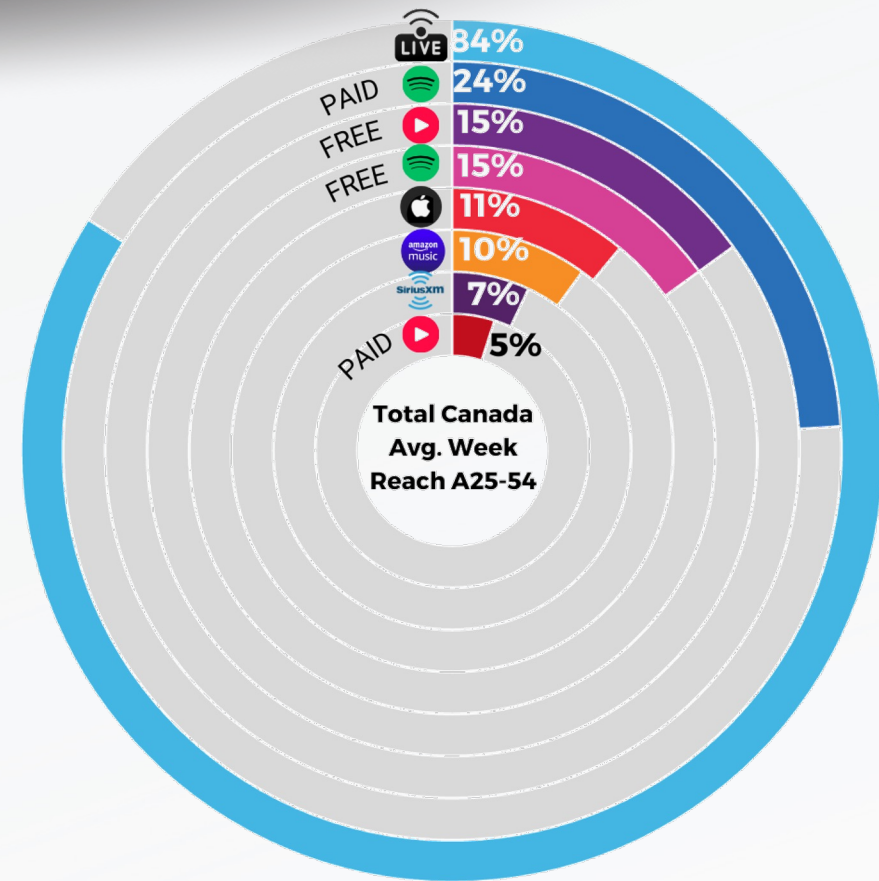
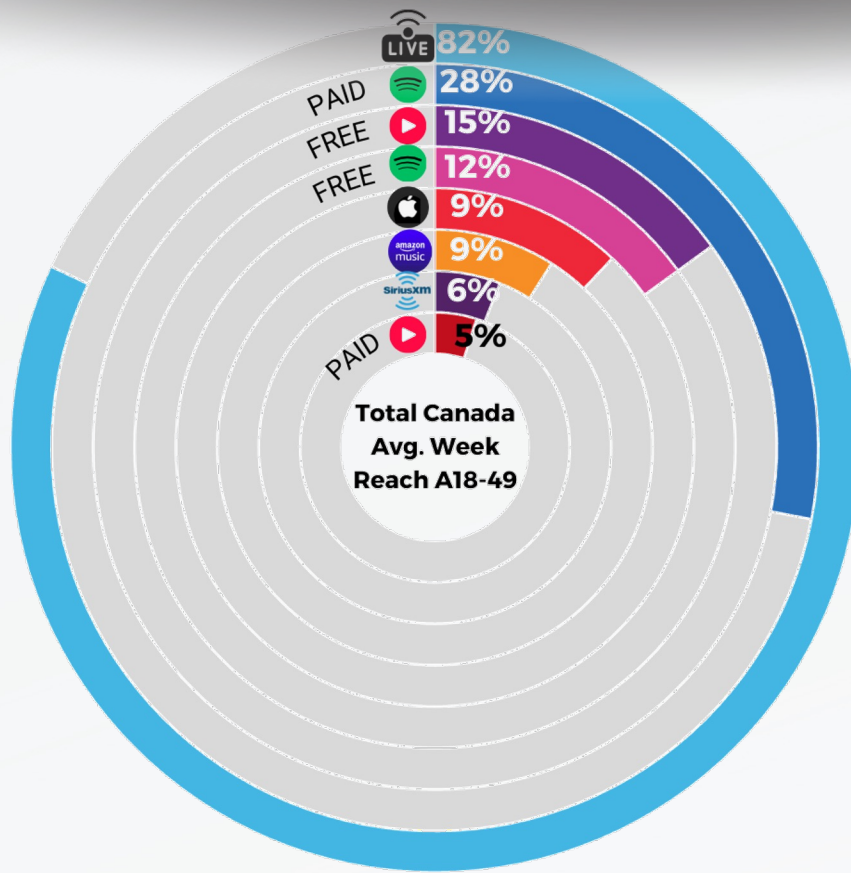


# LIVE BROADCAST RADIO IS THE LARGEST AUDIO PLATFORM LISTENED TO BY CANADIANS

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%**

Free Music Streaming

## Alta/Man/Sask

**76%**

AM/FM Radio

**13%**

Podcasts

**12%**

Free Music Streaming

## Ontario

**69%**

AM/FM Radio

**20%**

Podcasts

**11%**

Free Music Streaming

## Quebec

**84%**

AM/FM Radio

**6%**

Podcasts

**10%**

Free Music Streaming

## Atlantic

**79%**

AM/FM Radio

**8%**

Podcasts

**14%**

Free 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%**

Free Music Streaming

## Medium Sized Cities

(Pop=100-499K)

**73%**

AM/FM Radio

**13%**

Podcasts

**14%**

Free Music Streaming

## Other Large Cities

(Pop=500K+)

**76%**

AM/FM Radio

**16%**

Podcasts

**7%**

Free Music Streaming

## Tor/Mtl/Van

**73%**

AM/FM Radio

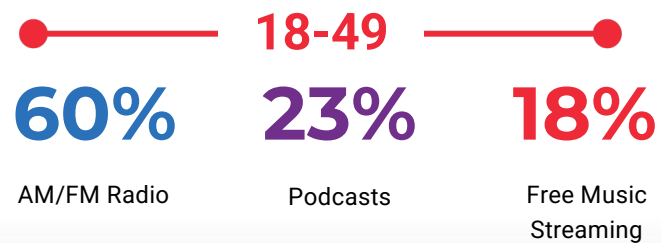
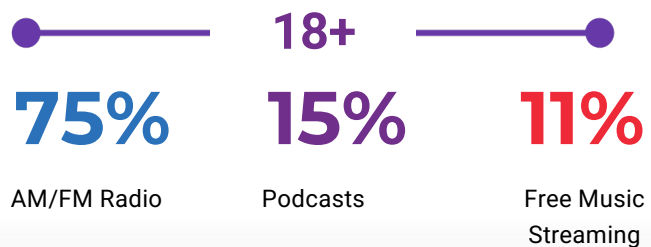
**13%**

Podcasts

**13%**

Free Music Streaming

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

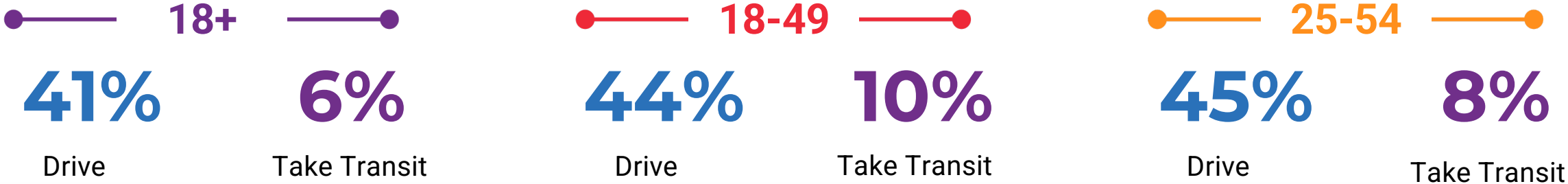


A18+ SHARE OF TIME SPENT WITH AD-SUPPORTED IN-CAR AUDIO

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

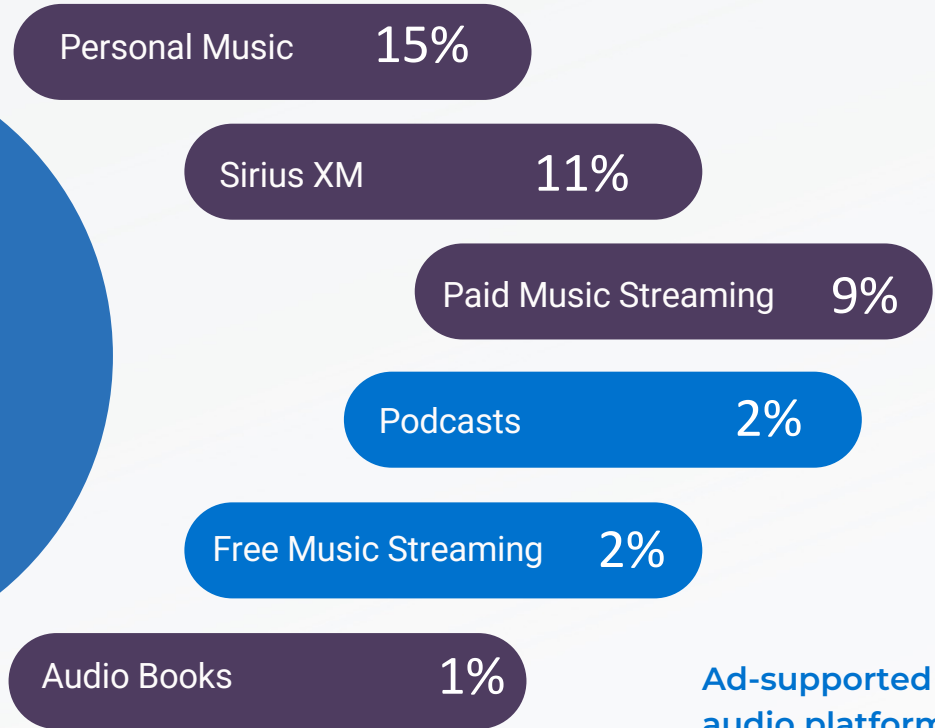




# BROADCAST RADIO IS IN THE DRIVER'S SEAT FOR IN-CAR AUDIO

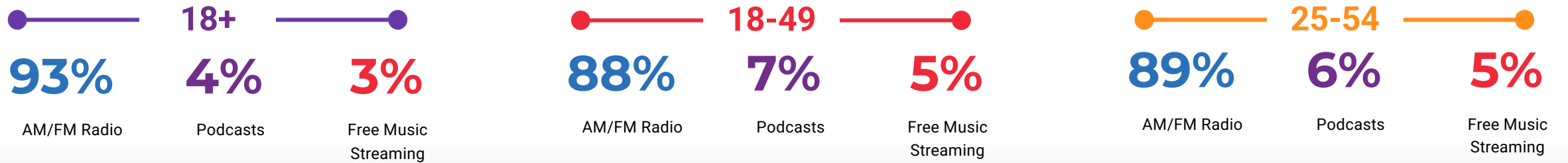
**59%**

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

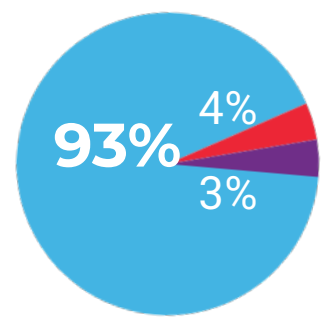
Source: Radio On The Move Fall 2023



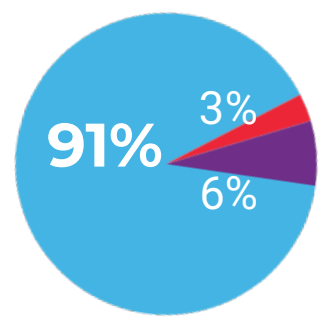


# EVEN IN CONNECTED CARS, LIVE RADIO DOMINATES

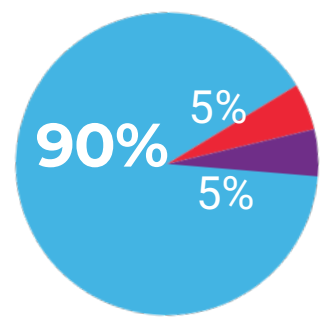
In cars with the latest technologies, Broadcast Radio delivers an overwhelming majority of time spent with ad-supported audio



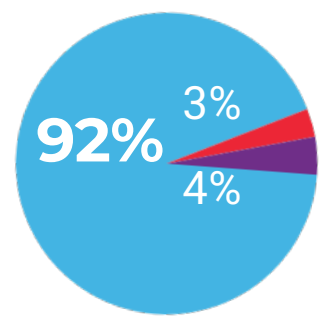
Total



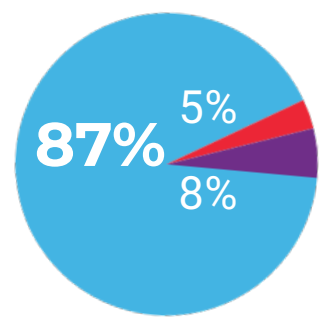
Built-in Wi-Fi



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 white with a vertical bar of colored squares (blue, orange, red) between the 'I' and 'O', and the word "CONNECTS" in white below it.

**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 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%**

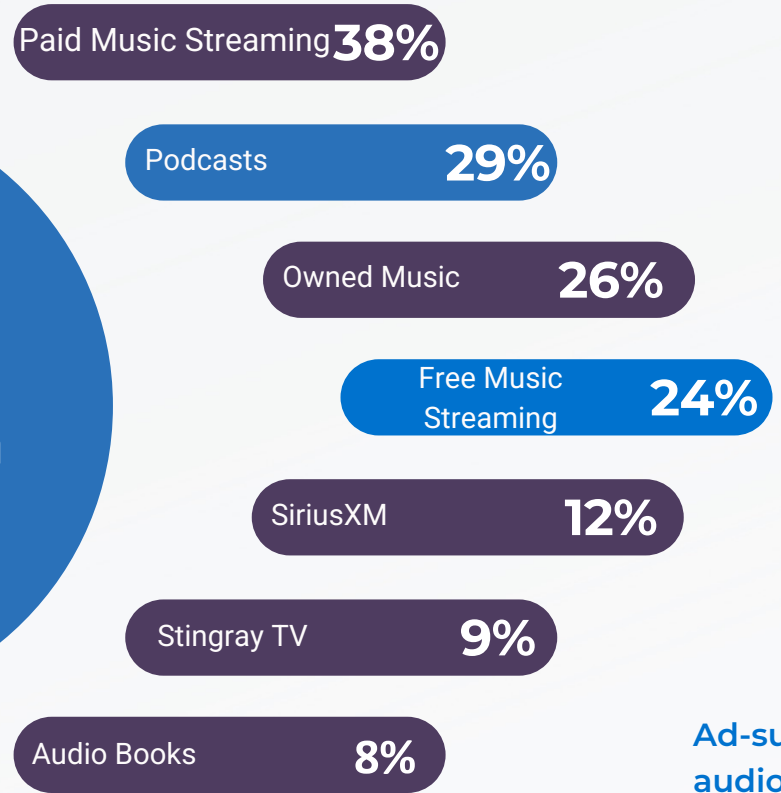
say they listen to Live Radio for more than 2 hours a day





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

**84%**  
Avg. wkly reach  
A25-54\*



Ad-supported audio platforms

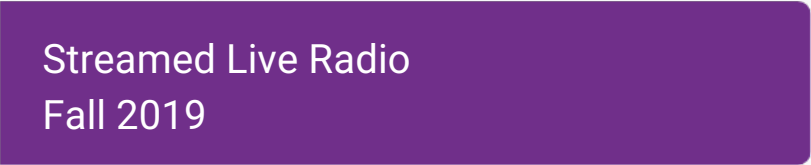


Source: Radio On The Move Fall 2023 | \* PPM FL 2023 Total Meter CTRL / AW / Weekly Reach %



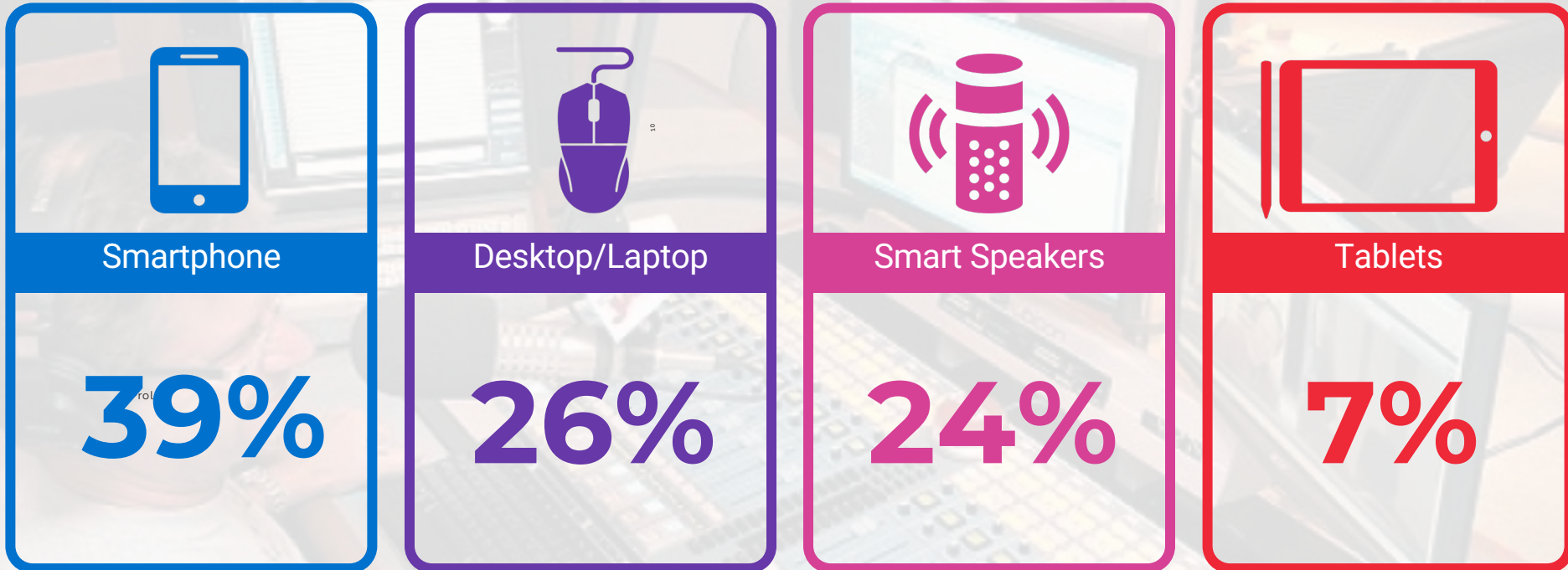
# 12% OF A18+ LISTENING TO LIVE RADIO IS NOW DONE BY TUNING TO BROADCAST RADIOS' DIGITAL STREAMS - THIS INCREASES TO 17% AMONG A18-34

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



Source: Radio On The Move Fall 2023

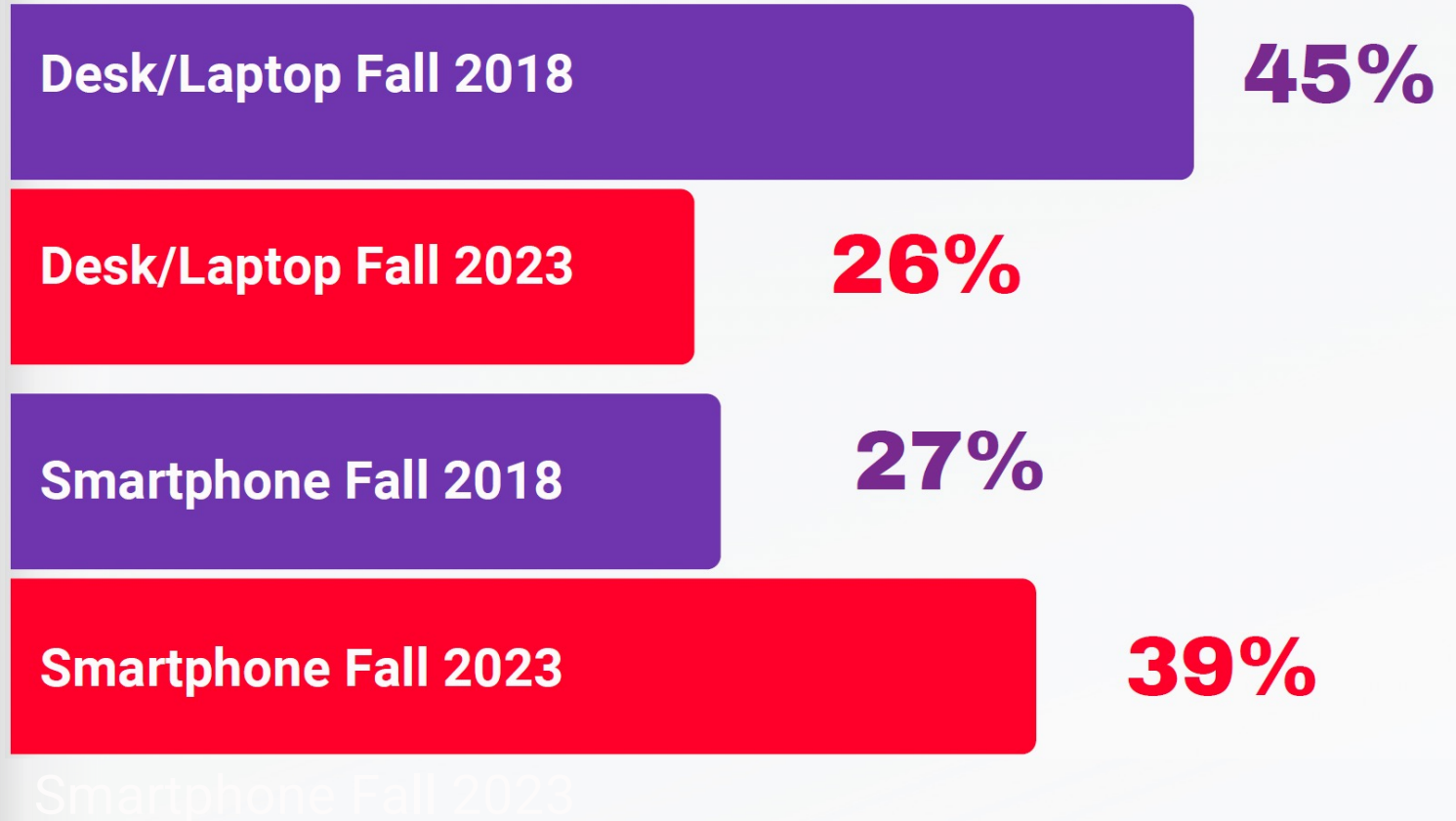
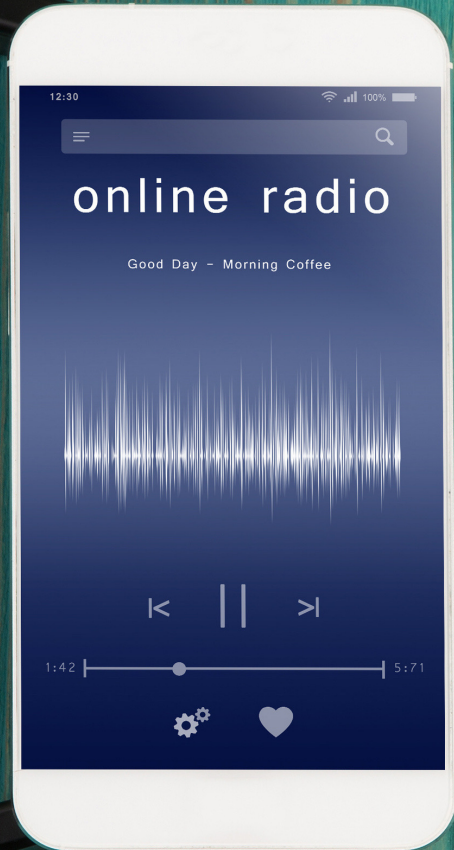
# STREAMING LIVE RADIO BY DEVICE



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%**

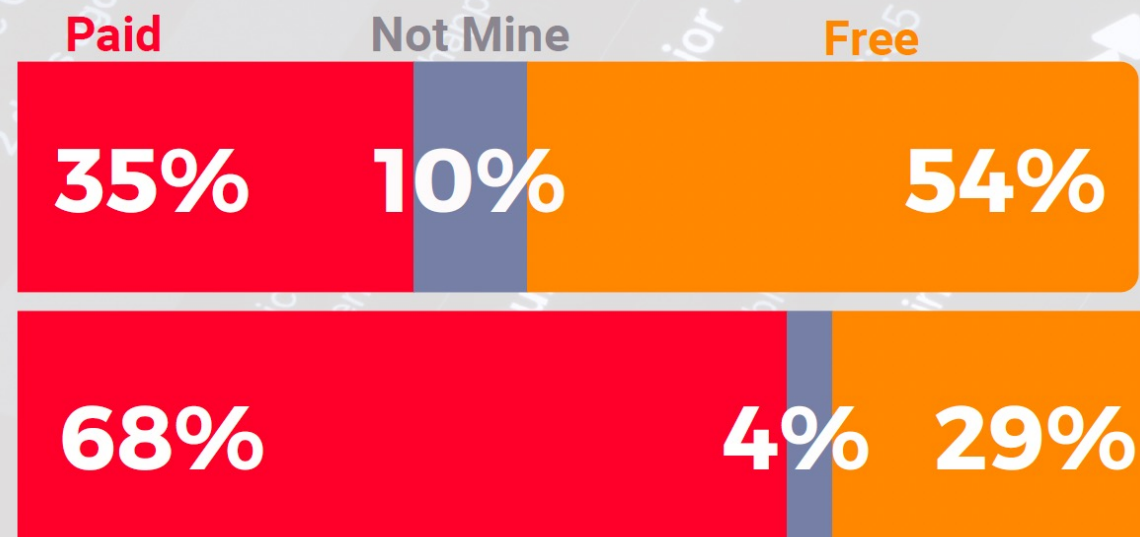
of Canadians streamed Free Spotify in the past week

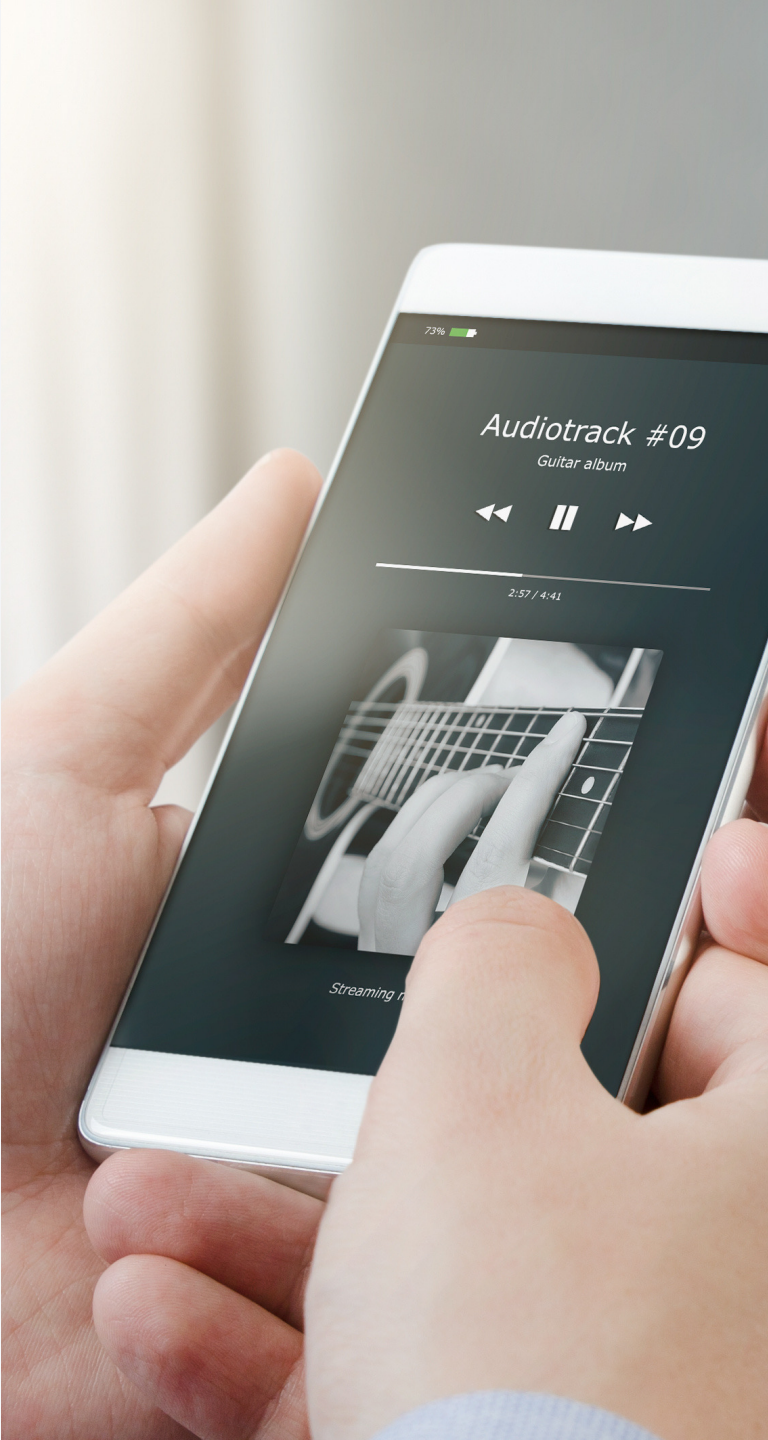


# PURE PLAY PLATFORMS ARE REPLACING “OWNED” MUSIC LIBRARIES

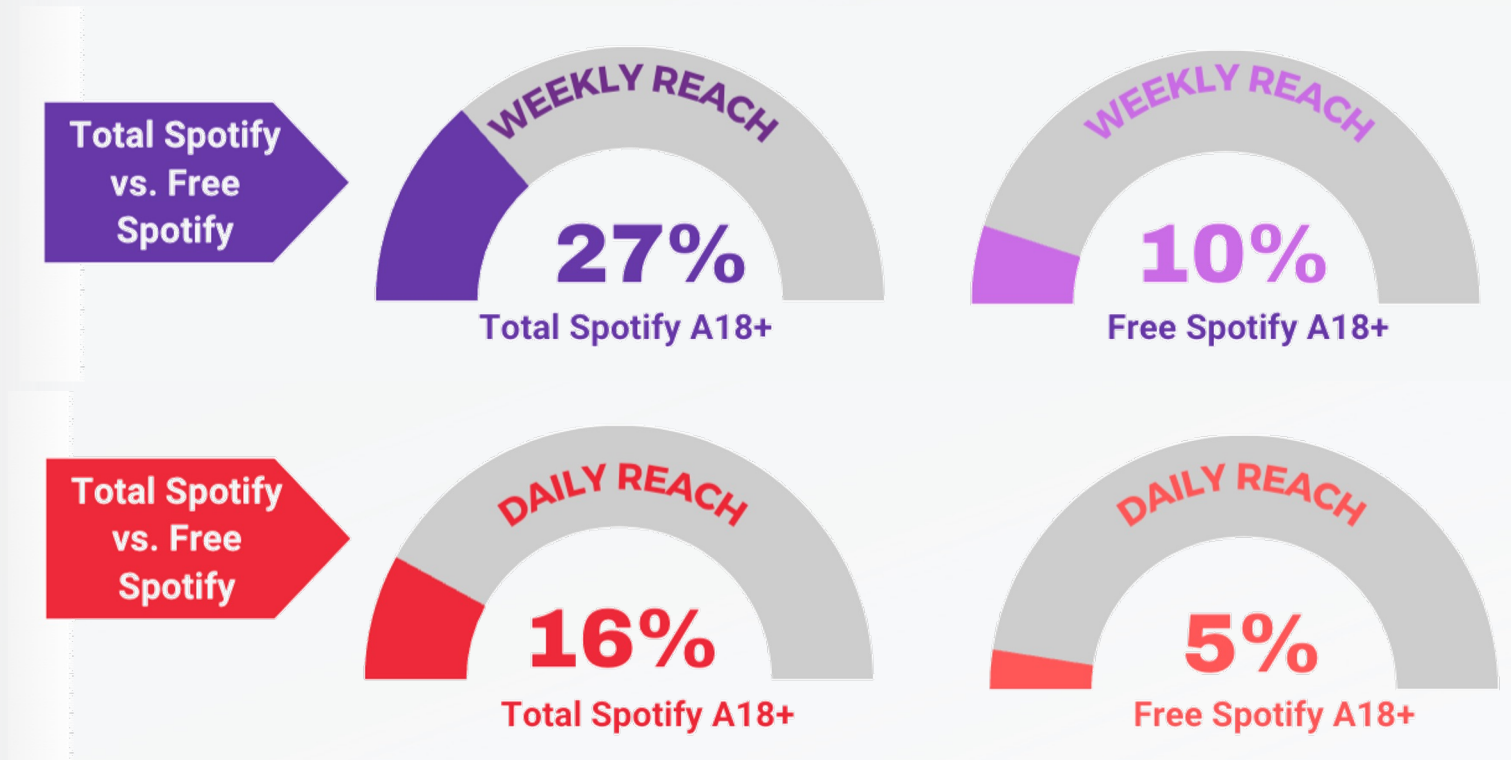
% of Spotify Daily Users 2017 vs 2023

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





# 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

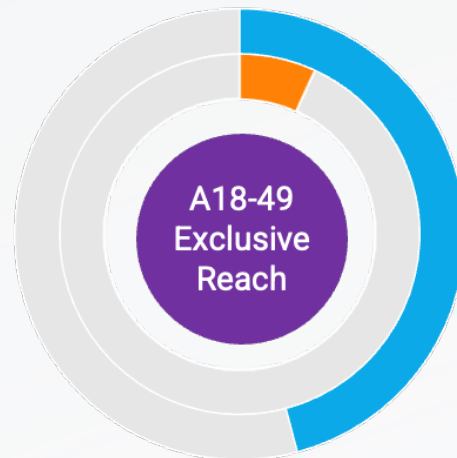
AM/FM Radio **57%**  
Free Spotify **4%**



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



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



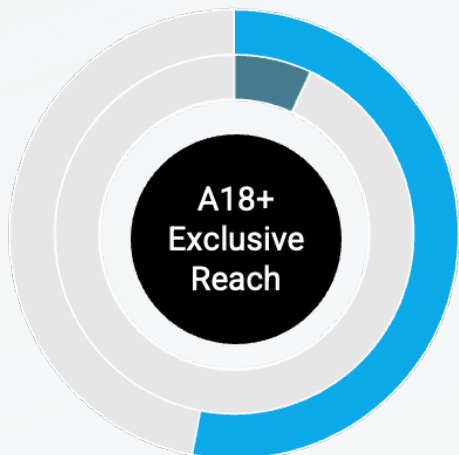
AM/FM Radio **39%**  
Free Spotify **10%**



# RADIO HAS CONSIDERABLY HIGHER EXCLUSIVE WEEKLY REACH THAN PODCASTS



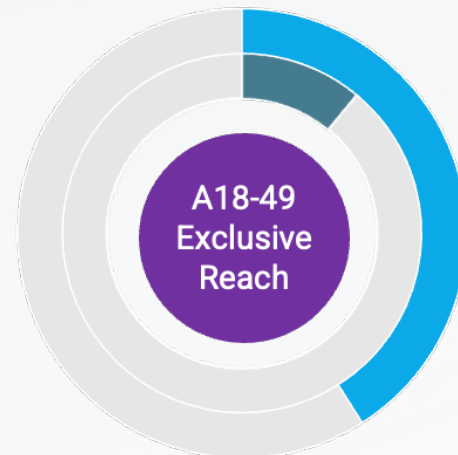
AM/FM Radio **53%**  
Podcasts **7%**



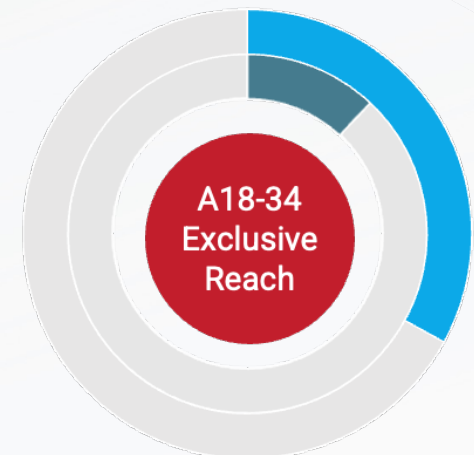
AM/FM Radio **45%**  
Podcasts **9%**



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

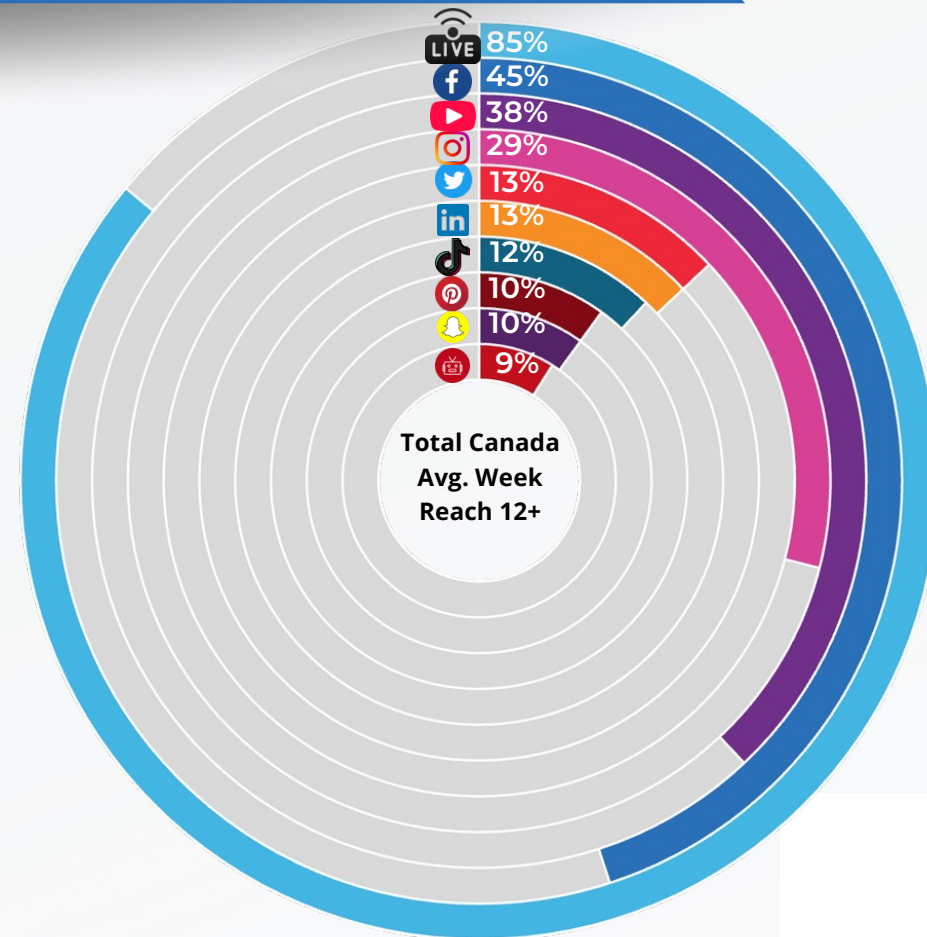


AM/FM Radio **33%**  
Podcasts **12%**

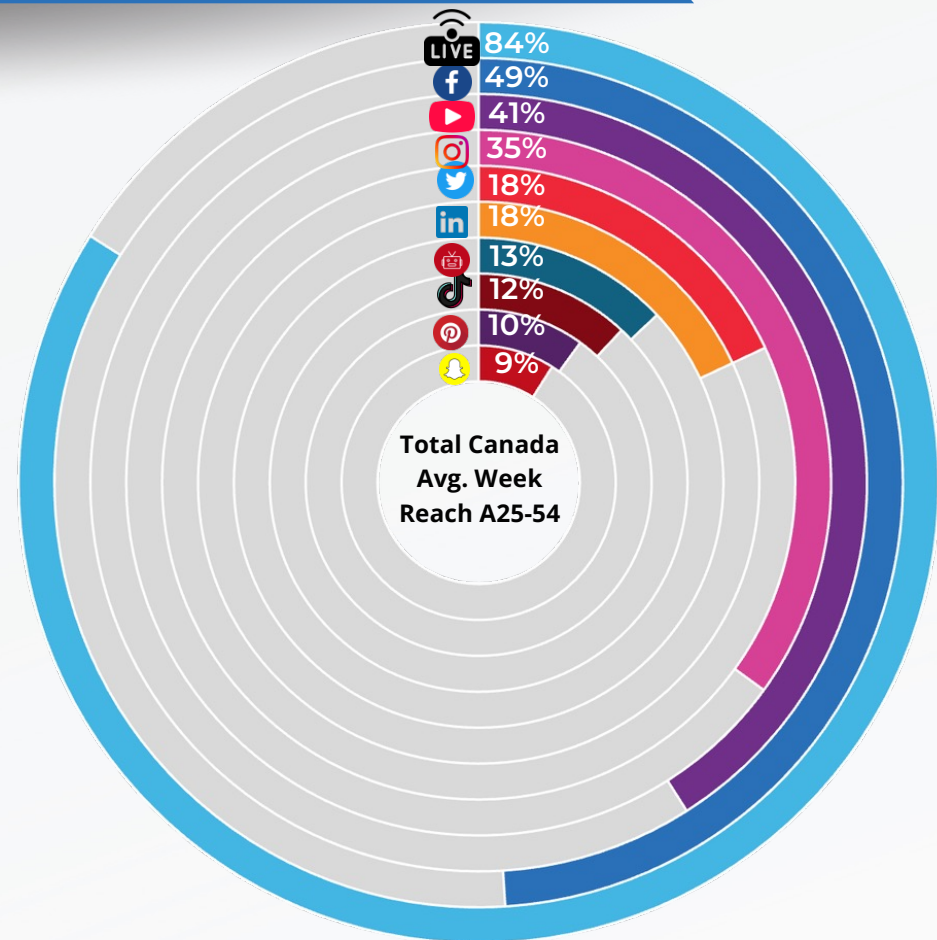
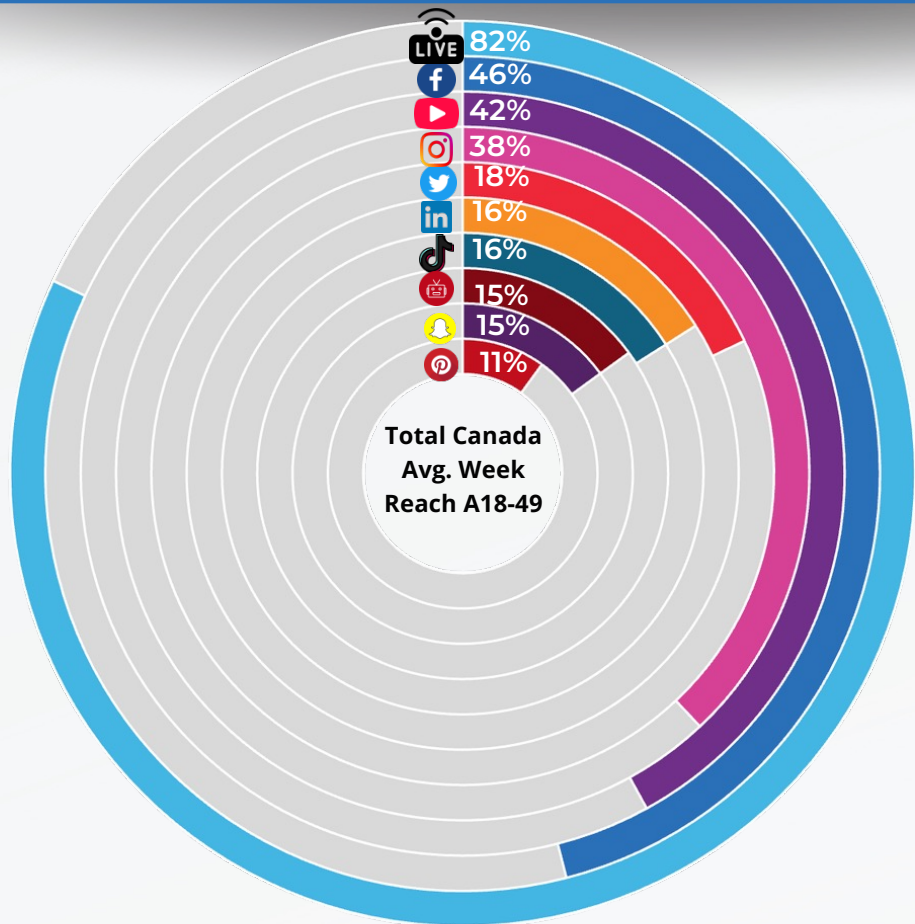


# LIVE BROADCAST RADIO, THE ORIGINAL MOBILE, AND STILL BIGGEST, SOCIAL MEDIA PLATFORM

REACHES MORE CANADIANS  
IN ONE WEEK THAN ANY  
OTHER SOCIAL MEDIA  
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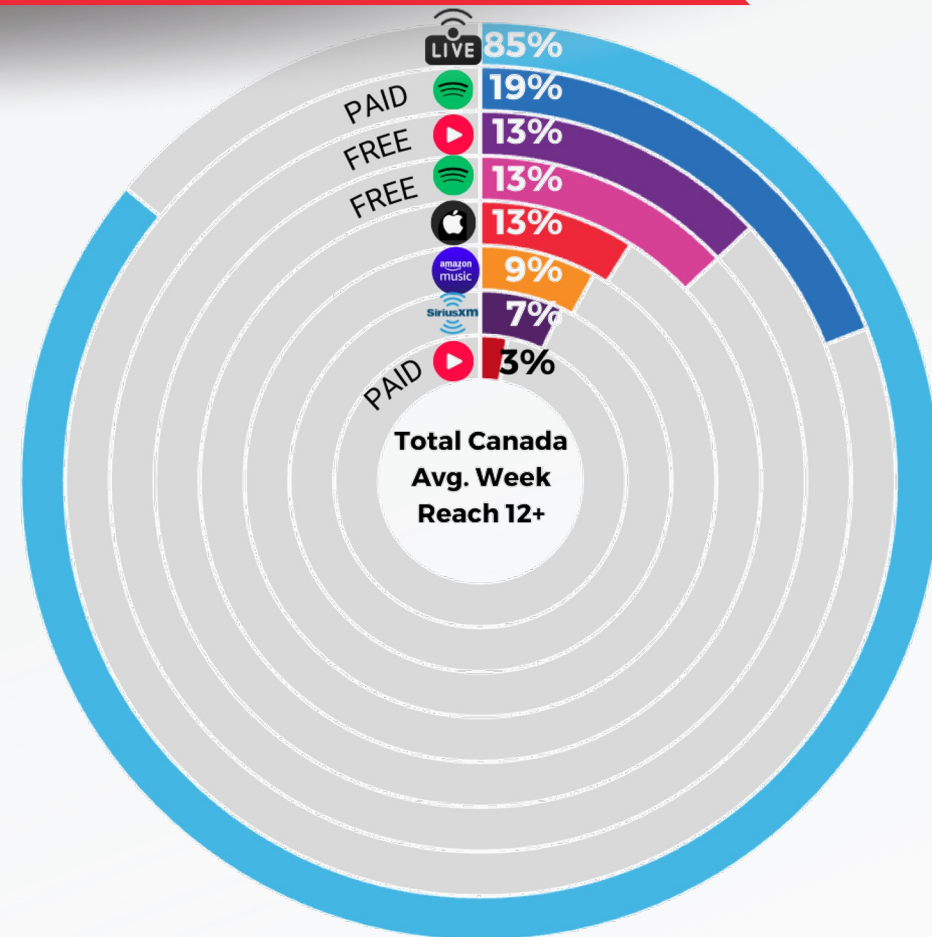


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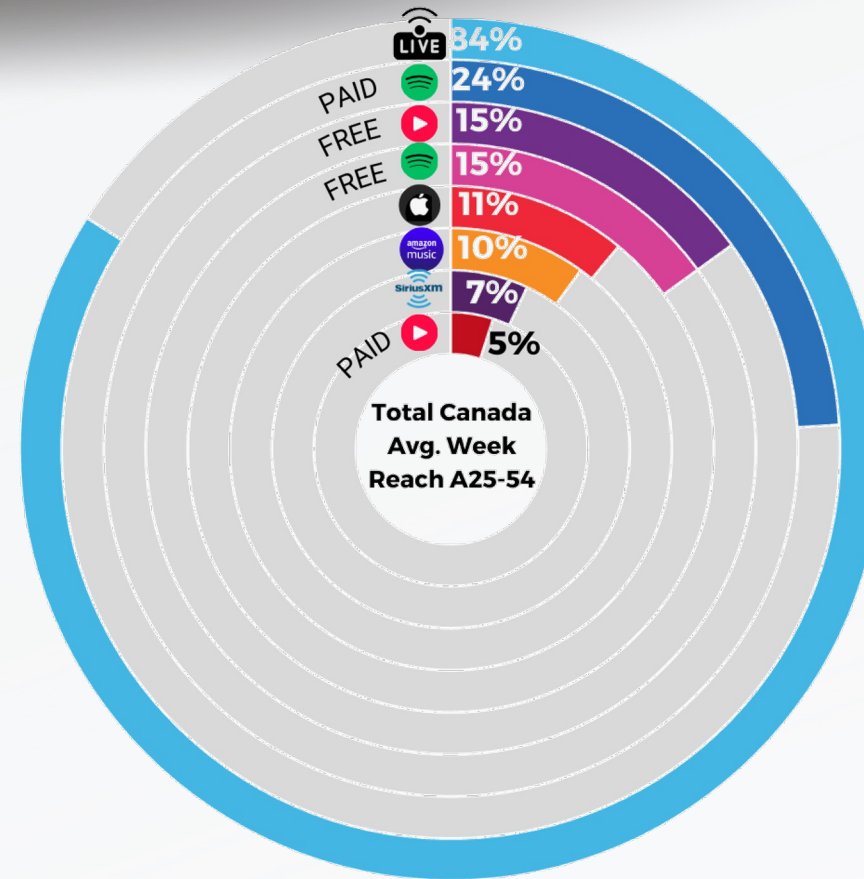
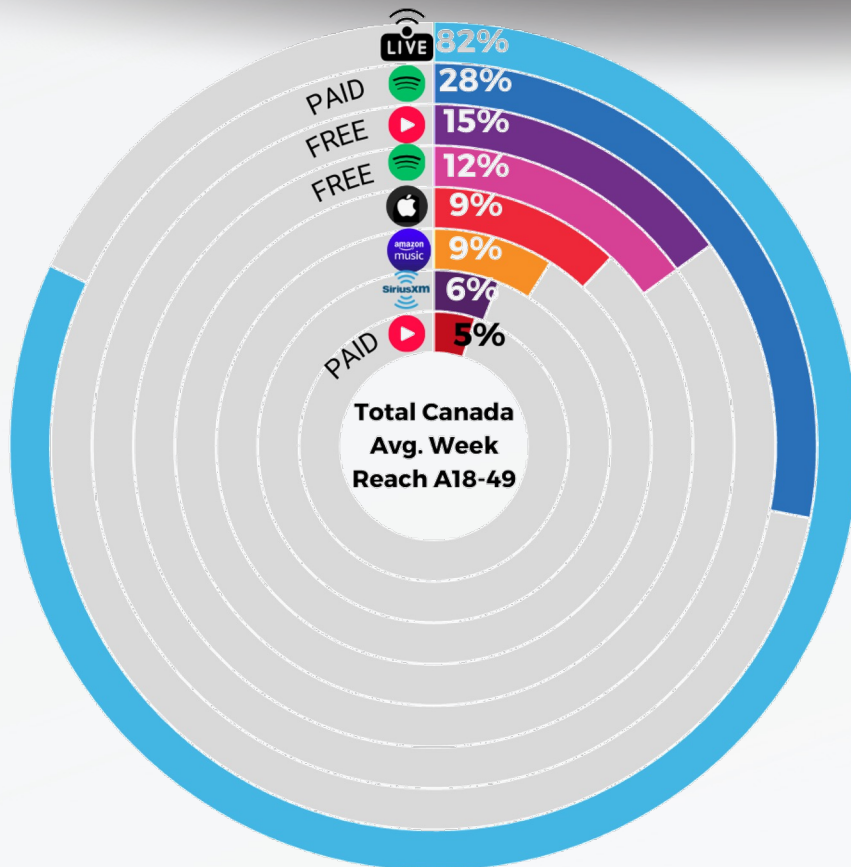


# LIVE BROADCAST RADIO IS THE LARGEST AUDIO PLATFORM LISTENED TO BY CANADIANS

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

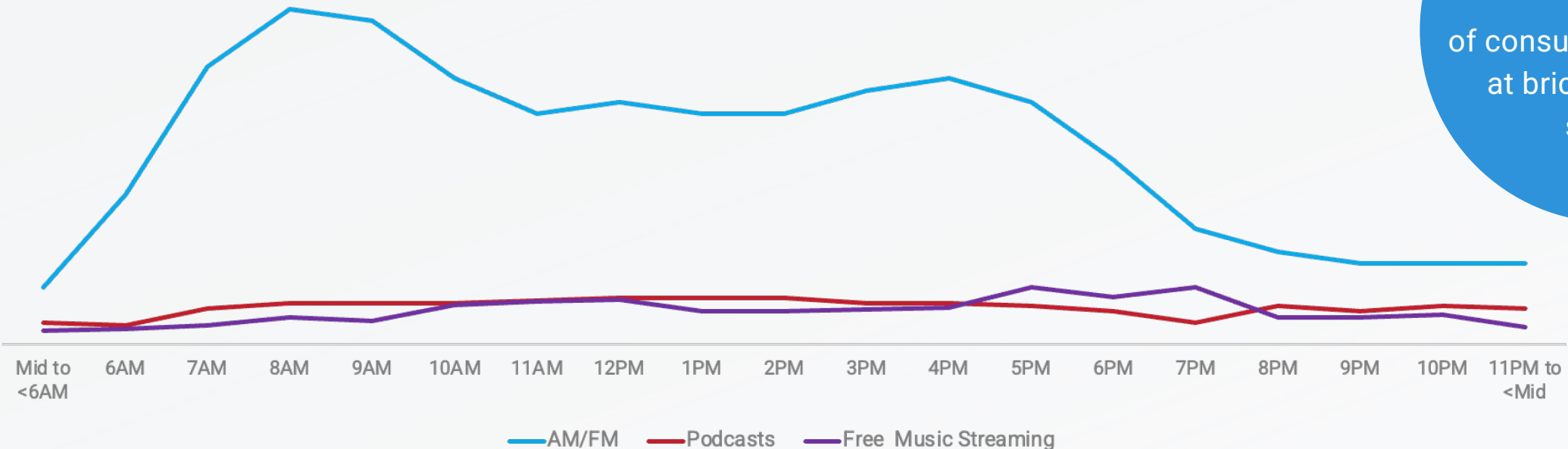




# LIVE RADIO HAS THE LARGEST BUYABLE AUDIENCES THROUGHOUT THE DAY

## 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%**

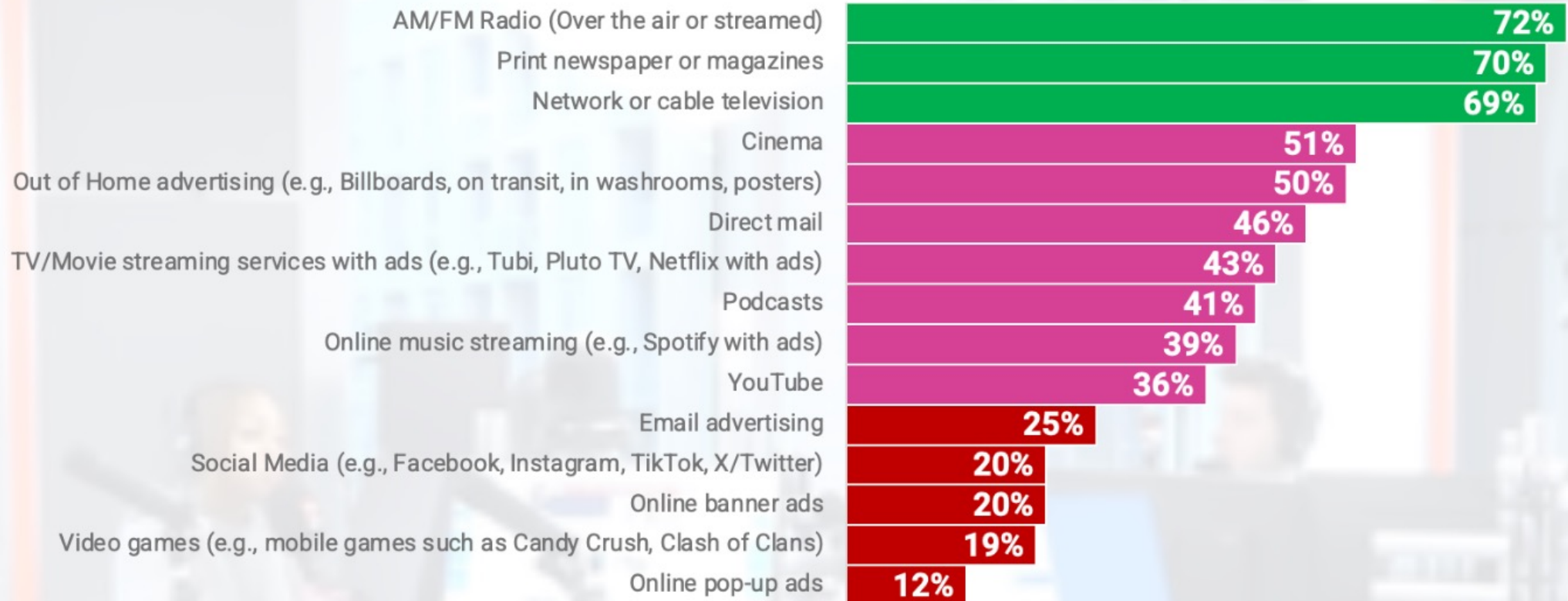
told someone  
else about it

**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