

RADIO
CONNECTS

AUDIO UPDATE

The latest in Canadian audio research

January 2025



www.radioconnects.ca



OVERVIEW

The following provides a current overview of the evolving audio landscape in Canada, highlighting the enduring power and versatility of Live AM/FM Radio.

It takes a look at key areas of audio, where advertisers can reach their consumers and includes details on ad-supported audio trends, in-car audio behavior, and the role of Radio in driving consumer action. The information underscores the unmatched trust and reach of Radio advertising, along with the growing impact of its digital reach.

For advertisers and marketers, this report serves as a valuable resource to understand how Live Radio continues to be a dominant and effective medium for connecting with audiences, influencing purchasing decisions, and achieving measurable advertising success in today's competitive market.

Insights have been generated from a questionnaire fielded in September 2024 by Signal Hill Insights to a Maru Voice Canada panel of over 3,000 Canadians.

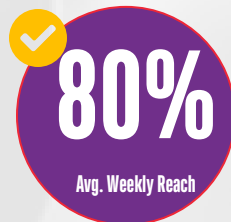
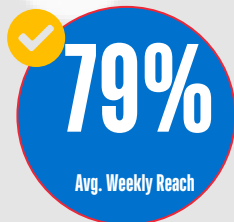
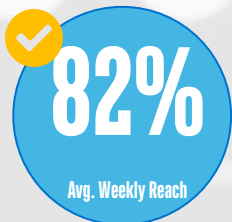


LIVE RADIO DOMINATES THE AD-SUPPORTED AUDIO LANDSCAPE

Live AM/FM Radio continues to dominate the ad-supported audio space in Canada, capturing an overwhelming 70% of the time Canadians spend with ad-supported audio. This positions Live Radio as the leading platform, far outpacing podcasts and free music streaming services.

- **Key Metrics:** Even among the crucial 25-54 and 18-49 demographics—key audiences for advertisers—Live Radio commands more listening time than podcasts and free music streaming combined.
- **Unmatched Scale:** In all key demographic groups, Live Radio provides significantly higher weekly reach compared to Free Spotify and Podcasts
- **Why It Matters:** This dominance highlights Radio’s unparalleled ability to reach mass audiences effectively and consistently.

7 OUT OF 10 MINUTES SPENT WITH AD-SUPPORTED AUDIO IS SPENT WITH LIVE RADIO¹.



1. B3Dx. Thinking of the following type(s) of audio that you mentioned listening to yesterday, how many hours and minutes in total did you spend listening to each one? Base: Canadians 18+ | Numeris PPM Total Meter CTRL, Fall 2024 AW M-Su sa-2a

RADIO RULES THE ROADS

Canadians prefer Live Radio for their commutes and while they are on the move, spending money when screens are off, and Radio is on :

- **Market Share:** 88% of in-car ad-supported audio time is dedicated to Live Radio, even in vehicles equipped with the latest digital audio technologies.¹
- **Key Context:** Canadians are far more likely to drive than take public transit, making the in-car environment a critical touchpoint for advertisers.
- **Commuter Behavior:** On average, Canadians spend 53 minutes of every in-car audio hour tuned to Live AM/FM Radio, providing an extended and captive audience for advertisers.¹



88% OF IN-CAR AD-SUPPORTED AUDIO IS DEDICATED TO LIVE RADIO ¹.

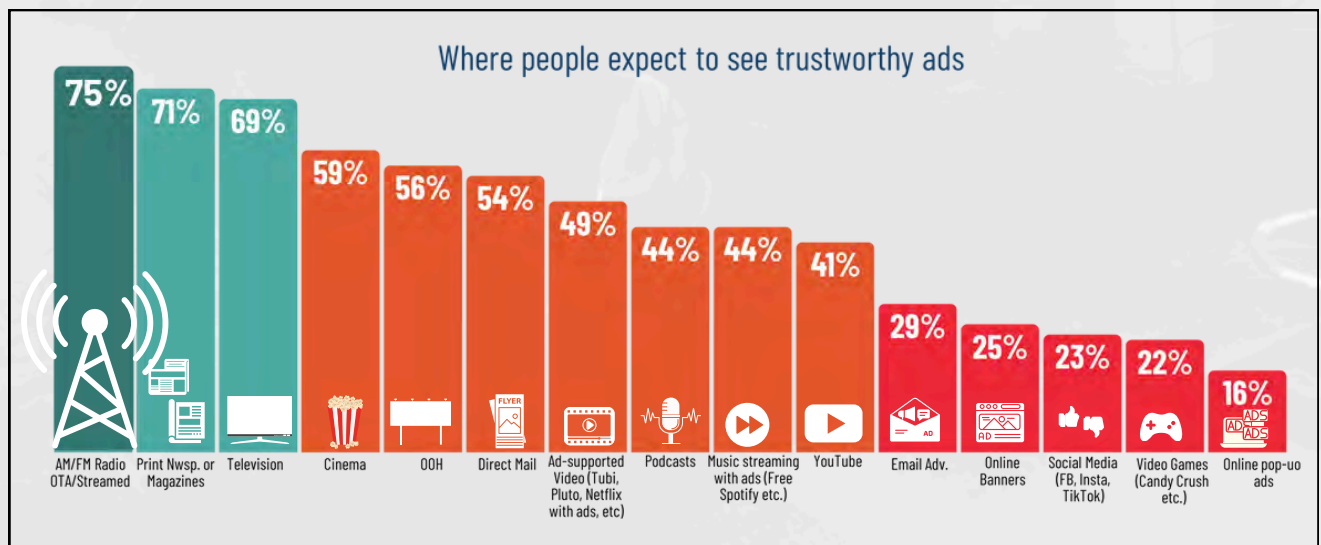
52% OF A18-49 WERE A DRIVER OR A PASSENGER IN A VEHICLE YESTERDAY VS. 6% WHO TOOK TRANSIT DAILY ².

RADIO ADVERTISING CONTINUES TO RANK AS ONE OF THE MOST TRUSTED FORMS OF ADVERTISING

Ads heard on AM/FM Radio are viewed as more trustworthy by Canadians compared to ads heard or seen on other platforms. Trust is a vital factor for effective advertising:

- **Trust Factor:** Canadians view Radio advertising as reliable and credible, a critical factor in building consumer confidence.
- **Local Relevance:** Radio’s ability to deliver localized content—including news, traffic updates, and events—makes it a trusted source for community engagement.
- **Advertiser Advantage:** This trust translates into higher engagement rates, making Radio an essential medium for advertisers looking to build lasting consumer relationships.

> 55%
of Canadians want to be told about new businesses and restaurants in their area – advertising on Live & Local AM/FM can accomplish that.¹

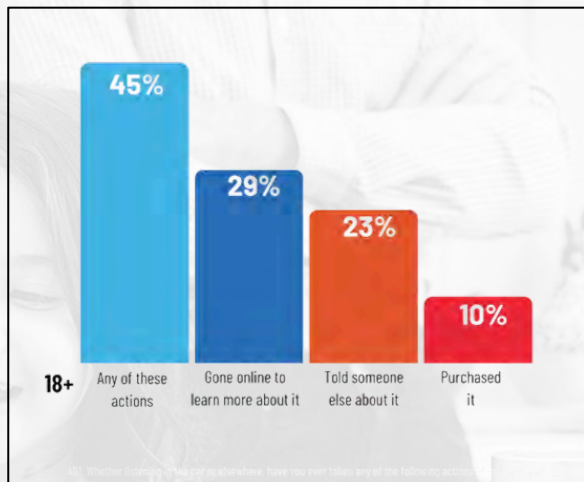


1: Q: LOCALIMPORTANCE. How much do you agree or disagree with the following statements? | 2: AD PERCEPTIONS. For each of the following media, please select whether or not the advertising you would expect to find there would be trustworthy
Base: Canadians 18+

RADIO DELIVERS ENGAGEMENT, INCLUDING AMONG THE ELUSIVE 18-34'S

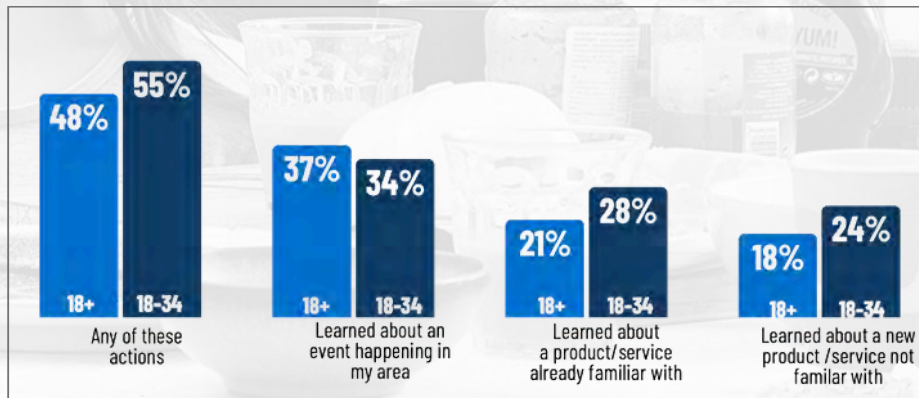
Live Radio listeners are often engaged in active listening, which contrasts with the more passive engagement seen among free streaming music listeners. This engagement is key for advertisers seeking attentive audiences:

- **Affluent Audiences:** Radio listeners, particularly those streaming AM/FM Radio, have higher-income and achieve higher education than listeners to free music streaming services, providing advertisers with greater reach against a premium consumer base.
- **Younger Engagement:** Among 18-34-year-olds, Live Radio drives significant engagement, particularly with ads introducing new products or services.
- **Local Connection:** More than half of 18-34 listeners value learning about new businesses, restaurants, products, and local events through Live Radio ads.



2.

45%
OF 18+ HAVE BEEN INSPIRED TO TAKE ACTION AFTER HEARING AN AD ON THE RADIO



3.

55%
18-34'S ARE 15% MORE LIKELY TO BE IMPACTED BY WHAT THEY'VE HEARD ON LIVE RADIO

1. B3b. When is the most recent time, if ever, you listened to the following types of audio on ANY DEVICE? OTHER MEDIA. When is the most recent time, if ever, you used each of the following on ANY DEVICE?
2. AD1. 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?
Base: Canadians 18+ | 3.: Q:NEW PRODUCT In the past couple of months, have you had any of the following experiences while listening to AM/FM Radio Base: Canadians 18+, 18-34

ADVERTISING ON THE RADIO DRIVES CONSUMER ACTION

Data showing that a substantial portion of Canadians engaged in activities like shopping were listening to AM/FM Radio during their travels. This highlights Radio's role in influencing purchasing decisions at critical moments:

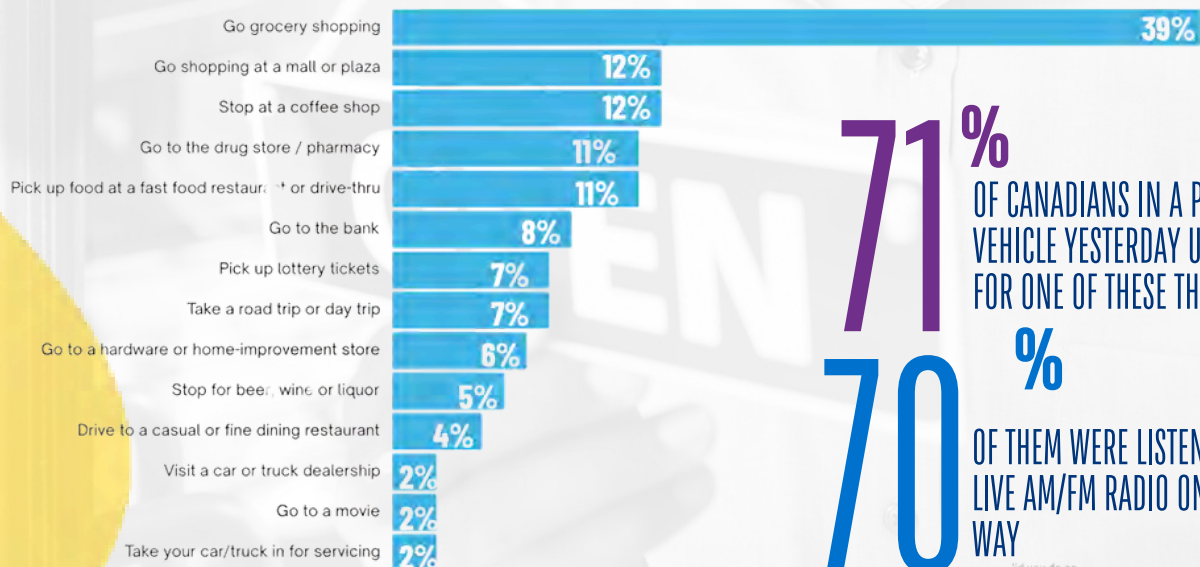
Engagement: 45% of listeners report taking action after hearing a Radio ad, from visiting a website to making a purchase. ¹

Path to Purchase: AM/FM provides an opportunity to connect with consumers who are making shopping trips in their car. ²

Community Impact: Radio ads introduce listeners to local businesses, events, and services, fostering community connections while driving economic activity.

CANADIANS LISTEN TO LIVE RADIO ON THE PATH TO PURCHASE

7-in-10 Canadians 18+ were in their vehicle yesterday, spending money - and most of them were listening to AM/FM radio while they did.



71% OF CANADIANS IN A PRIVATE VEHICLE YESTERDAY USED IT FOR ONE OF THESE THINGS

70% OF THEM WERE LISTENING TO LIVE AM/FM RADIO ON THE WAY

AD1. 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? C5d. And still thinking about the time you spent in a private vehicle YESTERDAY, did you do any of these things while driving, or used your vehicle to get there? Base: Canadians in private vehicle yesterday. QC5e: Were you listening to AM/FM Radio in the car while going or doing this YESTERDAY. Base: Canadians who did at least one activity in-car yesterday.

RADIO'S REACH, TRUST AND ADAPTABILITY CREATE IMPACT FOR ADVERTISERS

Canadians engage with Live Radio on the path to purchase, connecting them with brands and delivering results through:

- **Cost-Effective Reach:** Radio offers unparalleled cost efficiency for reaching large and diverse audiences.
- **Engagement at Scale:** With high listener trust and engagement, Radio ensures that ad messages resonate and inspire action.
- **Integrated Campaigns:** As a standalone platform or in combination with digital and television campaigns, Live Radio amplifies message impact, helping advertisers achieve their goals effectively.



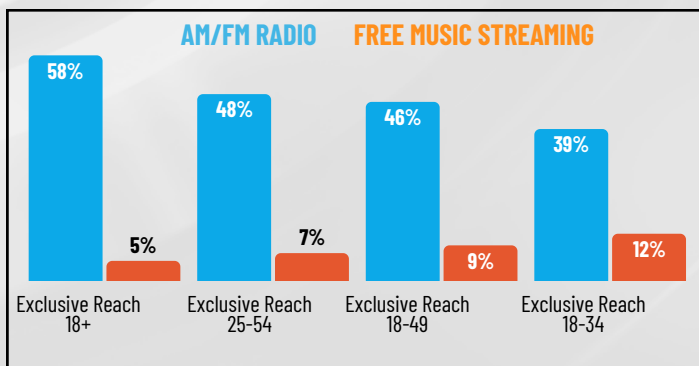
82% OF ALL WEEKLY¹ DOLLARS SPENT ON GROCERIES ARE SPENT BY RADIO LISTENERS

68% OF CANADIANS 18+ WHO HAVE SHOPPED ONLINE IN THE PAST WEEK ALSO LISTEN TO AM/FM RADIO².

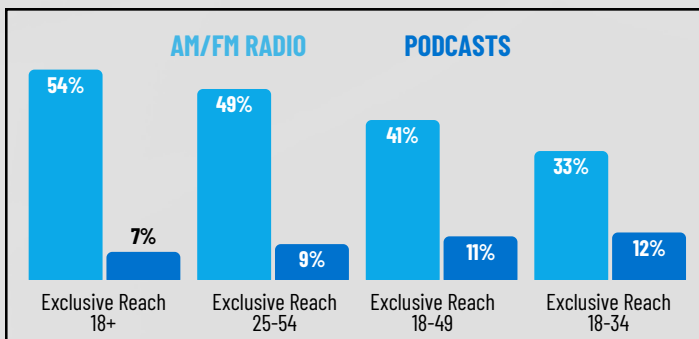
RADIO IS A VITAL COMPLEMENT TO OTHER ADVERTISING CHANNELS

Radio's unique advantages enhance overall campaign effectiveness and amplifies results:

- **Exclusive Reach:** Live Radio outperforms podcasts and free music streaming in weekly reach across all major demographics, ensuring advertisers can connect with audiences that other platforms miss.
- **TV Synergy:** Radio complements television campaigns by extending reach and frequency, covering an **additional 24%** of the adult population and amplifying overall impact¹:
- **Multi-Platform Benefits:** By integrating Radio with other media channels, advertisers can achieve greater message consistency and broader audience coverage.



2.



2.

LIVE RADIO DELIVERS SIGNIFICANTLY HIGHER WEEKLY *EXCLUSIVE REACH* AND OUTPERFORMS FREE SPOTIFY AND PODCASTS - ACROSS ALL KEY DEMOS

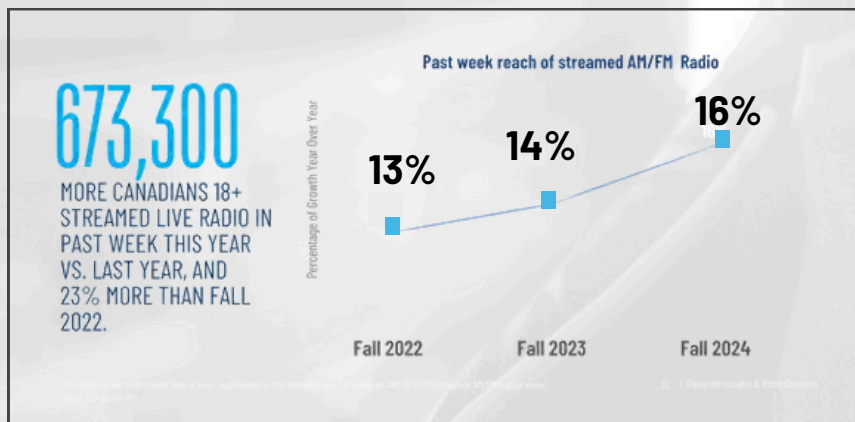
1: OTHER_MEDIA. When is the most recent time, if ever, you used each of the following on ANY DEVICE? SUMMARY TABLE OF PAST WEEK Base: Canadians 18+ | 2: B3e_STREAMING. You mentioned listening to free online music streaming in the past week. Which of the following FREE services did you listen to in the past week? B3B. When is the most recent time, if ever, you listened to the following types of audio on ANY DEVICE? SUMMARY TABLE OF PAST WEEK Base: Canadians 18+, 25-54, 18-49, 18-34

RADIO IS GROWING ITS DIGITAL FOOTPRINT

As digital consumption grows, Live Radio has adapted well, with increasing numbers of Canadians tuning into AM/FM Radio streams via smartphones and other devices. This growth demonstrates Broadcast Radio’s resilience and evolving relevance: as digital platforms reshape the media landscape, Live Radio has embraced digital transformation, enhancing its accessibility and measurability:

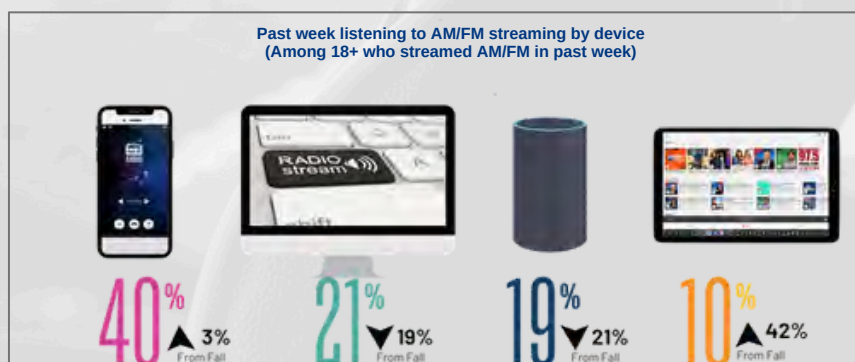
- **Streaming Growth:** Streaming of Live AM/FM Radio continues to grow, offering advertisers new opportunities to target addressable audiences.
- **Mobile Listening:** Canadians are increasingly accessing streamed AM/FM Radio through mobile devices, making it a portable and adaptable option for modern lifestyles.
- **Measurable Impact:** Digital streaming provides better attribution data, enabling advertisers to measure campaign performance more effectively.

1.



GROWTH IN AM/FM STREAMING IS MAKING LIVE RADIO MORE DIGITAL, MORE ADDRESSABLE AND MORE MEASURABLE THROUGH ATTRIBUTION

2.

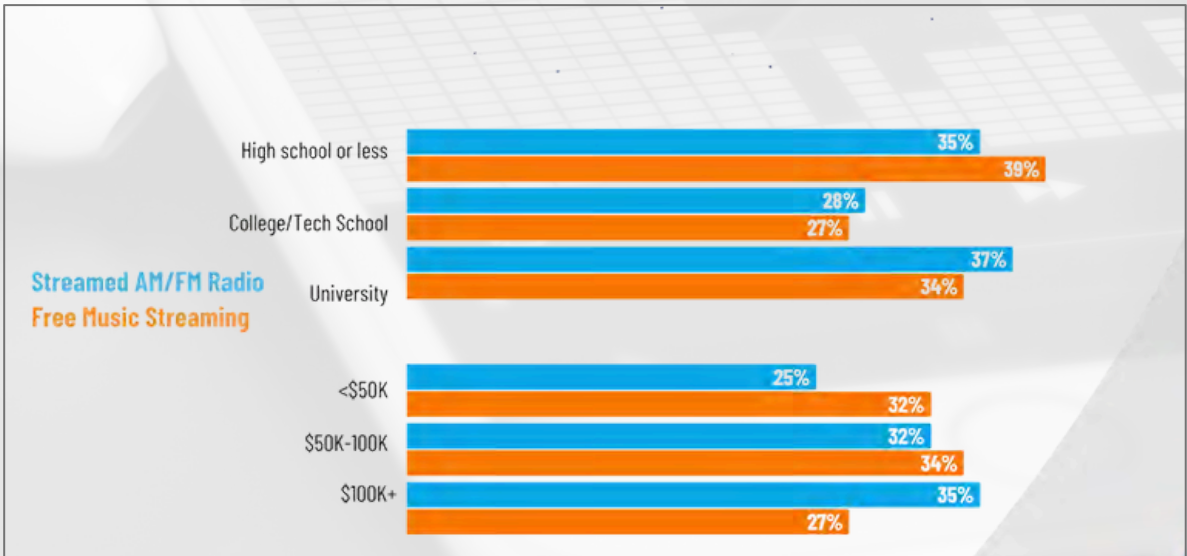


CANADIANS ARE TAKING STREAMED AM/FM WITH THEM, AND ARE INCREASINGLY LIKELY TO BE LISTENING ON MOBILE DEVICES SUCH AS PHONES AND TABLETS

B3b When is the most recent time, if ever, you listened to the following types of audio on ANY DEVICE? (streamed AM/FM in past week)
Base: Canadians 18+ | 2: B3e.1. Thinking back to the PAST WEEK, which devices did you use to listen to each of the following media? Streamed AM/FM stations Base: Canadians 18+, streamed AM/FM in past week

STREAMED AM/FM RADIO REACHES ATTRACTIVE AUDIENCES

Streamed Radio reaches more higher income and educated earners, whereas Free Streaming attracts younger, less affluent and educated audiences.



Benefits of AM/FM Streaming Audience



Reaches a more premium consumer base



Radio streamers can be effectively targeted just like other digital audio



26% more earn \$100K+

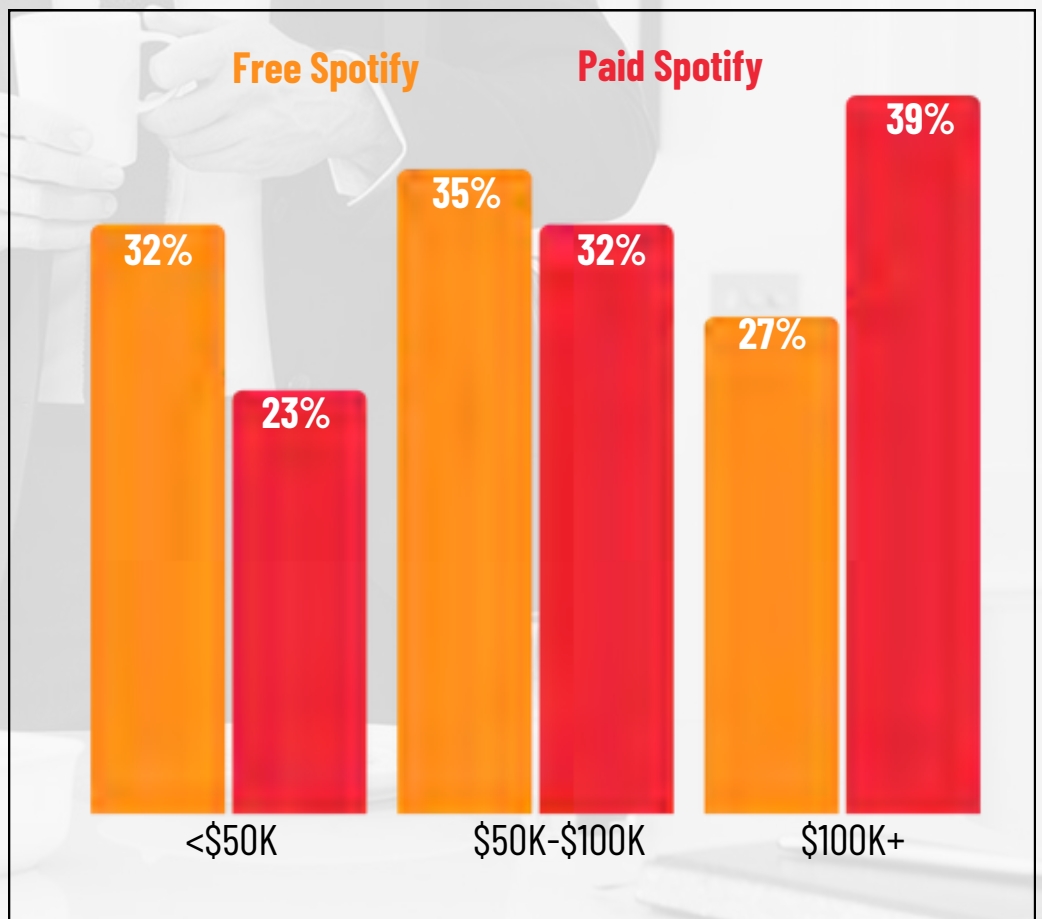


9% more have university + education

B3b. When is the most recent time, if ever, you listened to the following types of audio on ANY DEVICE? OTHER MEDIA. When is the most recent time, if ever, you used each of the following on ANY DEVICE? Base: Canadians 18+

BROADCAST RADIO STREAMERS AND PAID SPOTIFY USERS HAVE SIMILAR INCOME AND EDUCATION

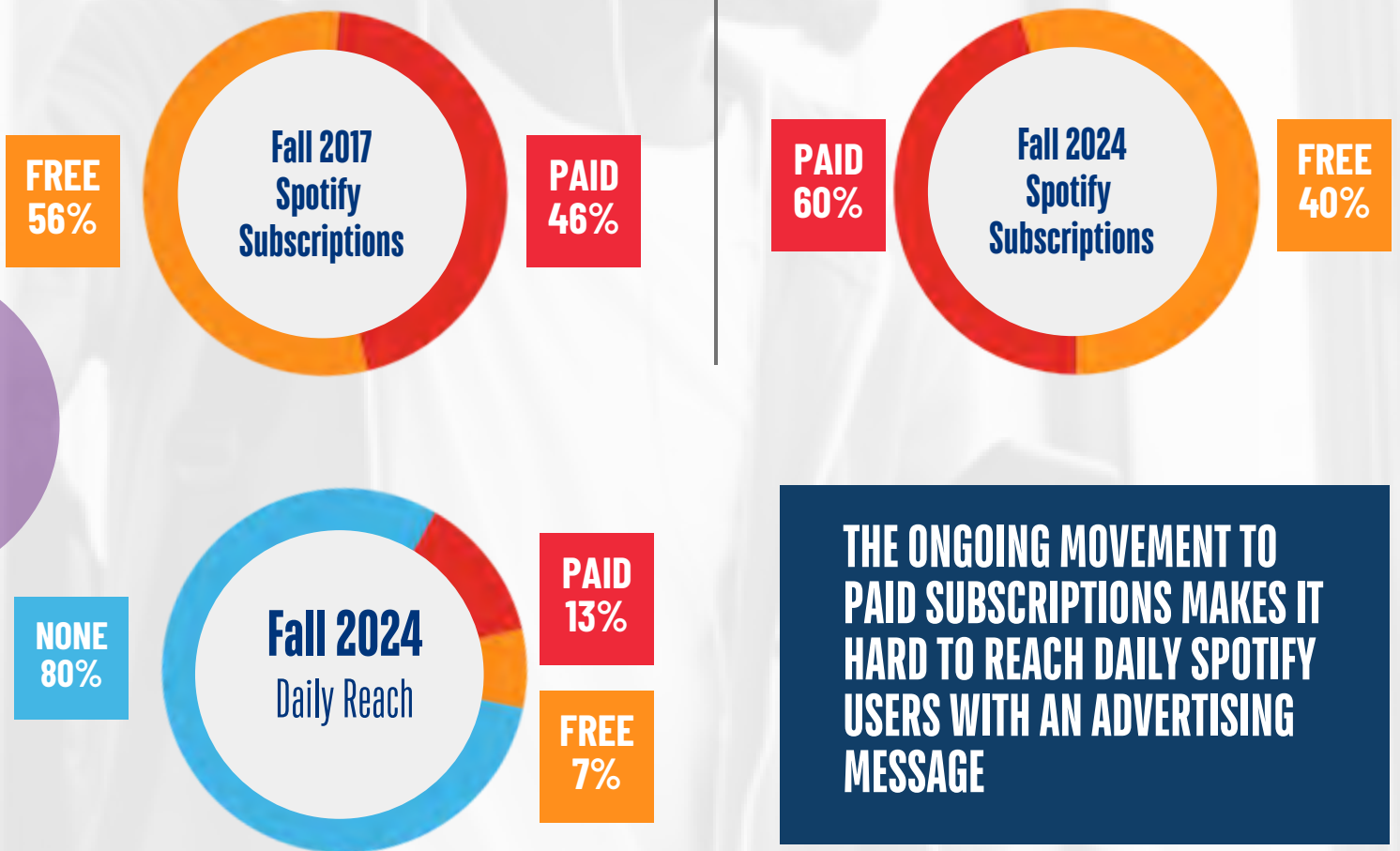
Those who use the ad-supported free version of Spotify, like other free streaming in general, have lower education and household income than the paid users, making them a much less premium audience than Radio streamers or Paid Spotify users.



F16a. You mentioned listening to Spotify. Which of the following best describes your Spotify subscription?
Base: Canadians 18+, listen to Spotify daily

SPOTIFY USERS CONTINUE TO MIGRATE TO THE PAID PLATFORM

This evolution demonstrates a consistent core behavior—personal music enjoyment—while transforming how it is curated. The shift in how individuals listen to their personal music isn't a new behavior; owned music libraries have existed longer than Broadcast Radio. The real change lies in how people access and enjoy their music collections, influenced by technological advancements and changes in delivery methods.



F16a. You mentioned listening to Spotify. Which of the following best describes your Spotify subscription?
Base: Canadians 18+, use Spotify daily

LIVE BROADCAST RADIO IS A POWERFUL MEDIA PLATFORM FOR ADVERTISERS



Dominant Share in Ad-Supported Audio: 7 of every 10 minutes spent with ad-supported audio time among Canadian adults, is spent listening to Live Radio.



In-Car Audio Leadership: Broadcast Radio is the leading choice for in-car audio, even in 'connected cars,' capturing 9 of every 10 minutes of the in-car listening time spent with ad-supported audio. This dominance is crucial for advertisers aiming to reach consumers during commutes and other travel, when screens are off.



Driving Consumer Action: A substantial portion of Canadians engaged in activities like shopping were listening to AM/FM Radio during their travels. When Canadians hear ads on the Radio, they take action.



High Engagement Among Listeners: Live Radio listeners are often engaged in 'active listening,' which contrasts with the more passive engagement seen in free streaming music listeners. This engagement is key for advertisers seeking attentive audiences.



Trust in Radio Advertising: Ads heard on AM/FM Radio are viewed as more trustworthy by Canadians compared to ads experienced on other platforms. Trust is a vital factor for effective advertising.



Reach and Scale: Broadcast Radio delivers substantial reach across all key demographic groups, outperforming all audio platforms. It also delivers more exclusive weekly reach than Free Spotify and podcasts. This extensive reach is vital for advertisers looking to target customers throughout the marketing funnel.



Digital Adaptation: As digital consumption grows, Live Radio is adapting to changing behaviours. Increasing numbers of Canadians are tuning into AM/FM Radio streams via smartphones and other devices, demonstrating Radio's continued connection and evolving relevance in the digital age.

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