



Live Radio in the
**AGE OF
DIGITAL AUDIO**
2025

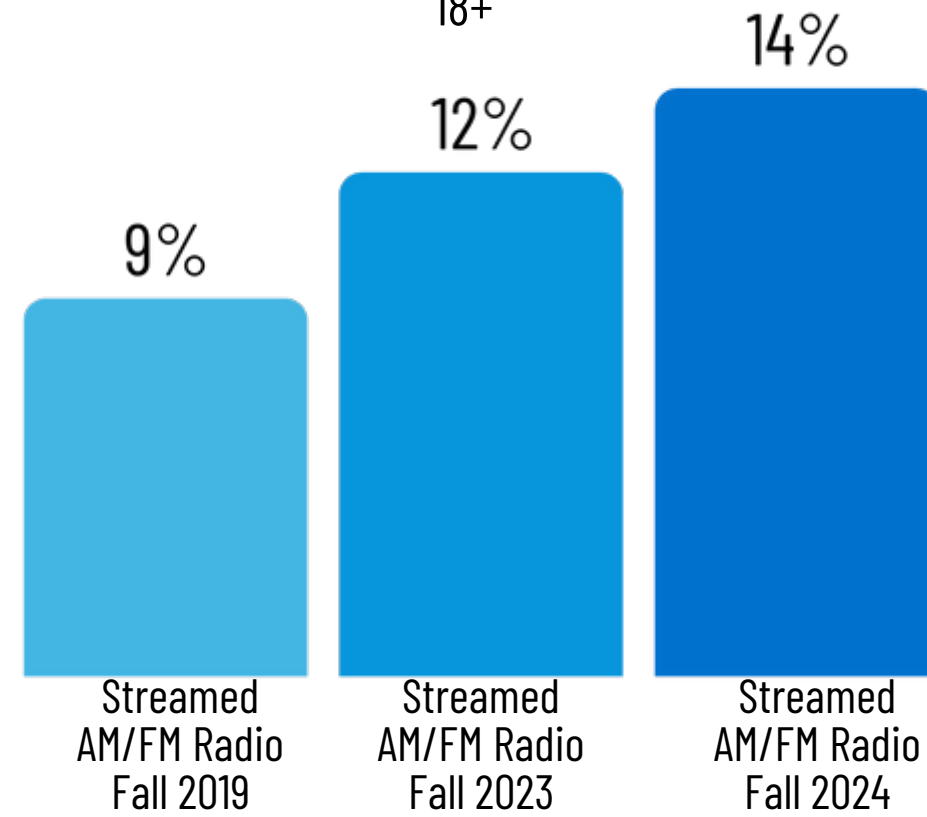


Share of listening to Streamed Live Radio is up by more than 50% since Fall of 2019

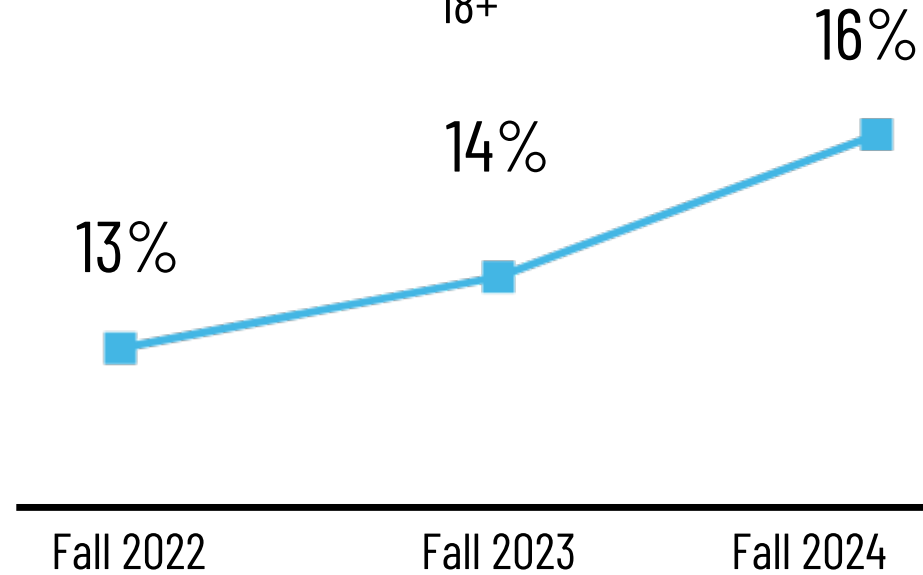
676,300
More Canadians 18+ streamed Live Radio this past week versus 2023

Source: Signal Hill Insights Fall 2024

Share of listening to Streamed AM/FM Radio 18+



Past week reach of Streamed AM/FM Radio 18+



Live Radio IS Digital, with More Canadians Streaming Stations Each Year, Offering Advertisers TARGETING Opportunities Alongside the Scale of Broadcast Radio



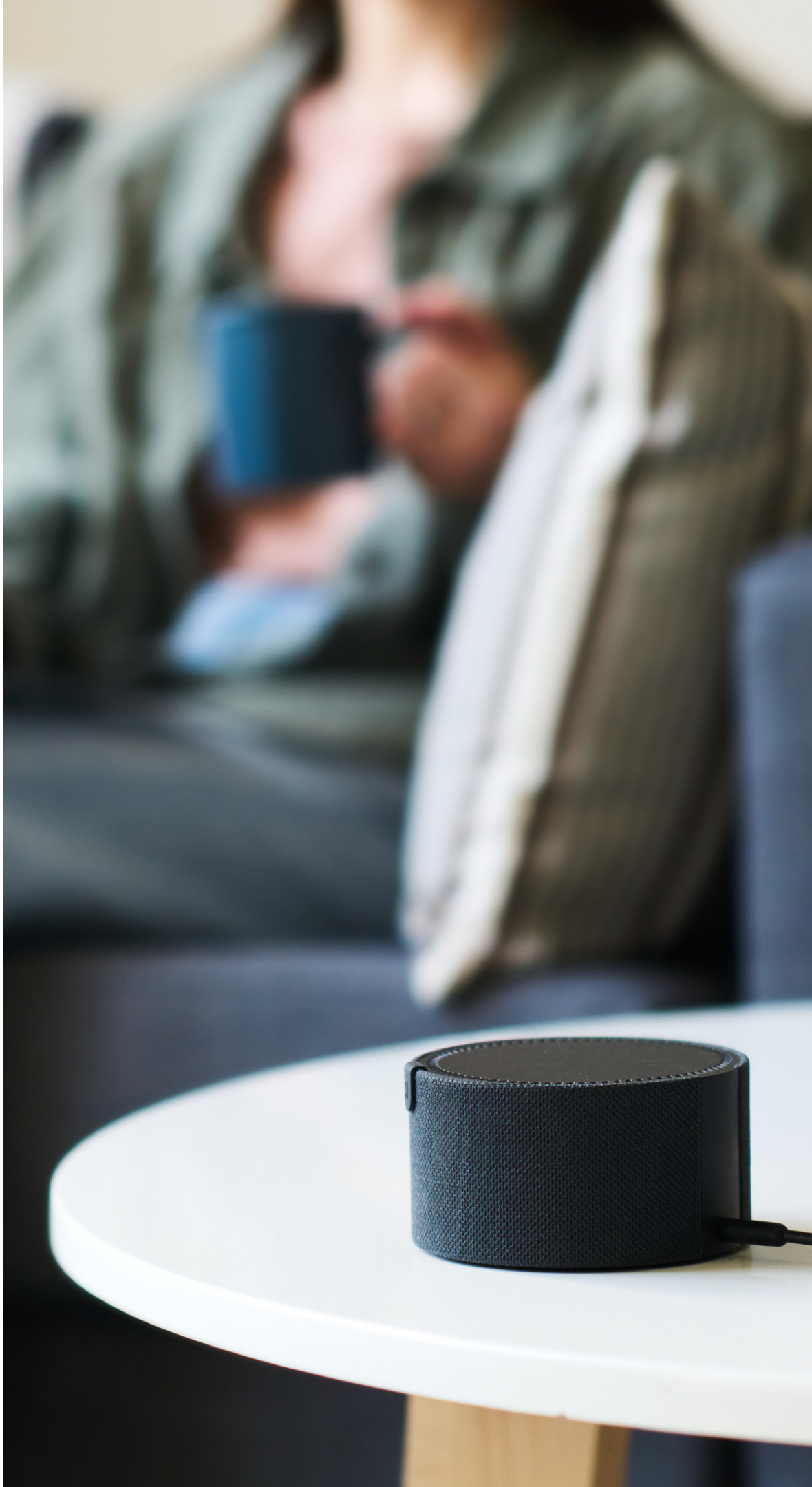
Music Streamers are Avid Listeners of Live Radio

Canadians who stream Live Radio are **typically daily listeners** and **over index** against the population for streaming because they are **avid audio listeners** in general.

Source: Signal Hill Insights Fall 2024

83%
SAY THEY LISTEN TO AM/FM RADIO ON A "TYPICAL WEEK DAY"

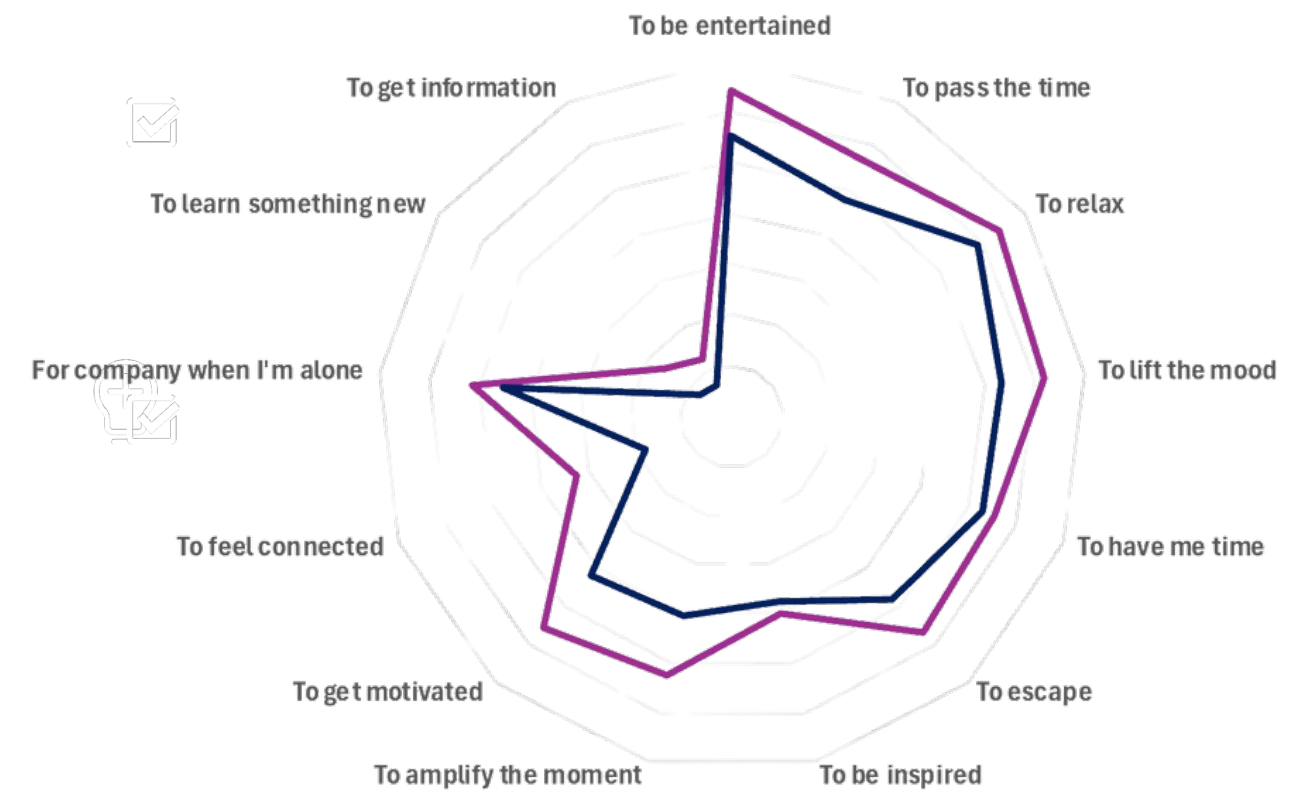
102 Index
VS. 18+



MUSIC STREAMING IS BECOMING THE NEW 'OWNED MUSIC'

Whether it's listening to **paid music streaming** or enjoying **'owned music,'** both experiences fulfill the **same need:** to feel **'disconnected'** from daily life.

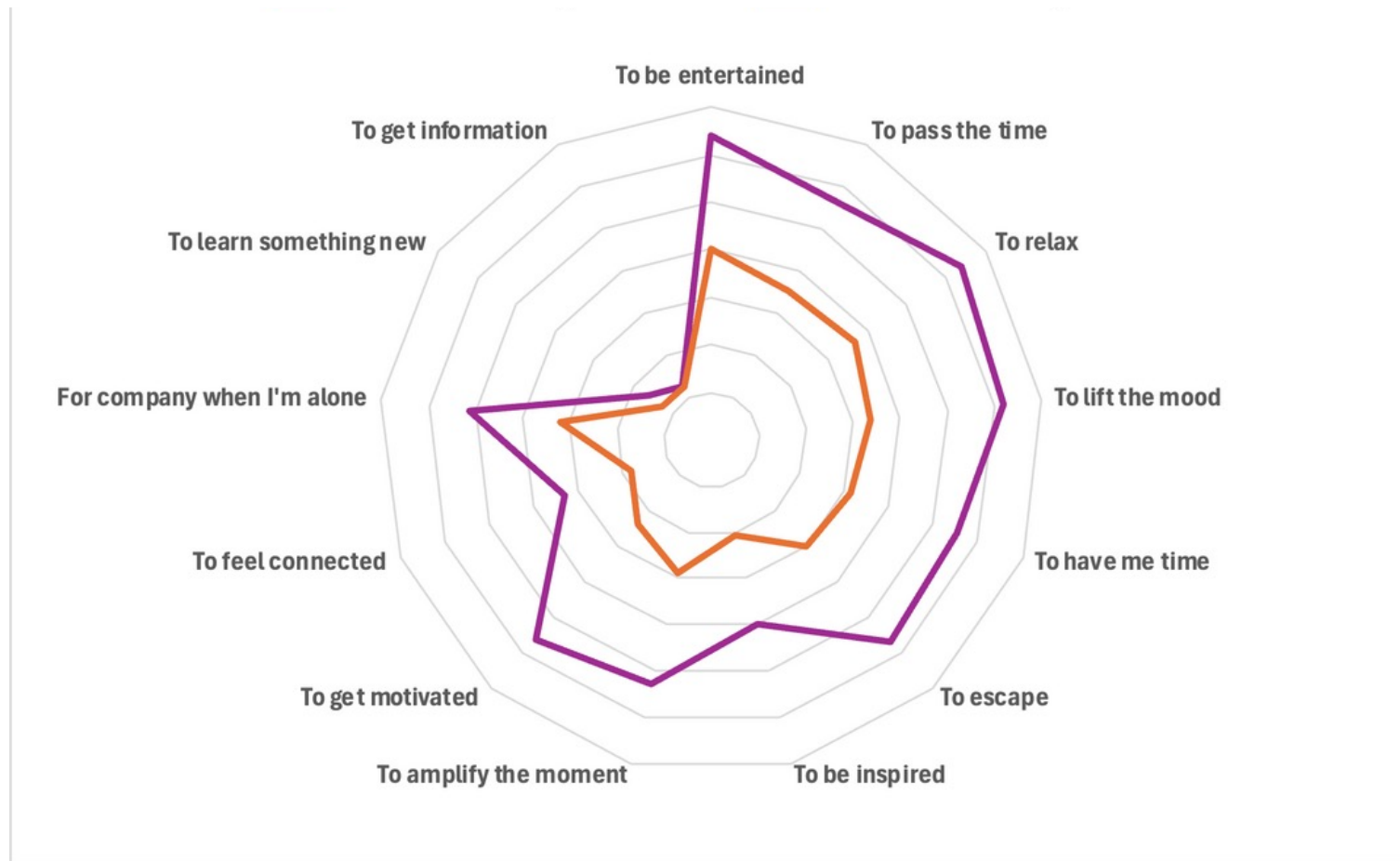
— Paid Music Streaming (without ads) — Owned Personal Music



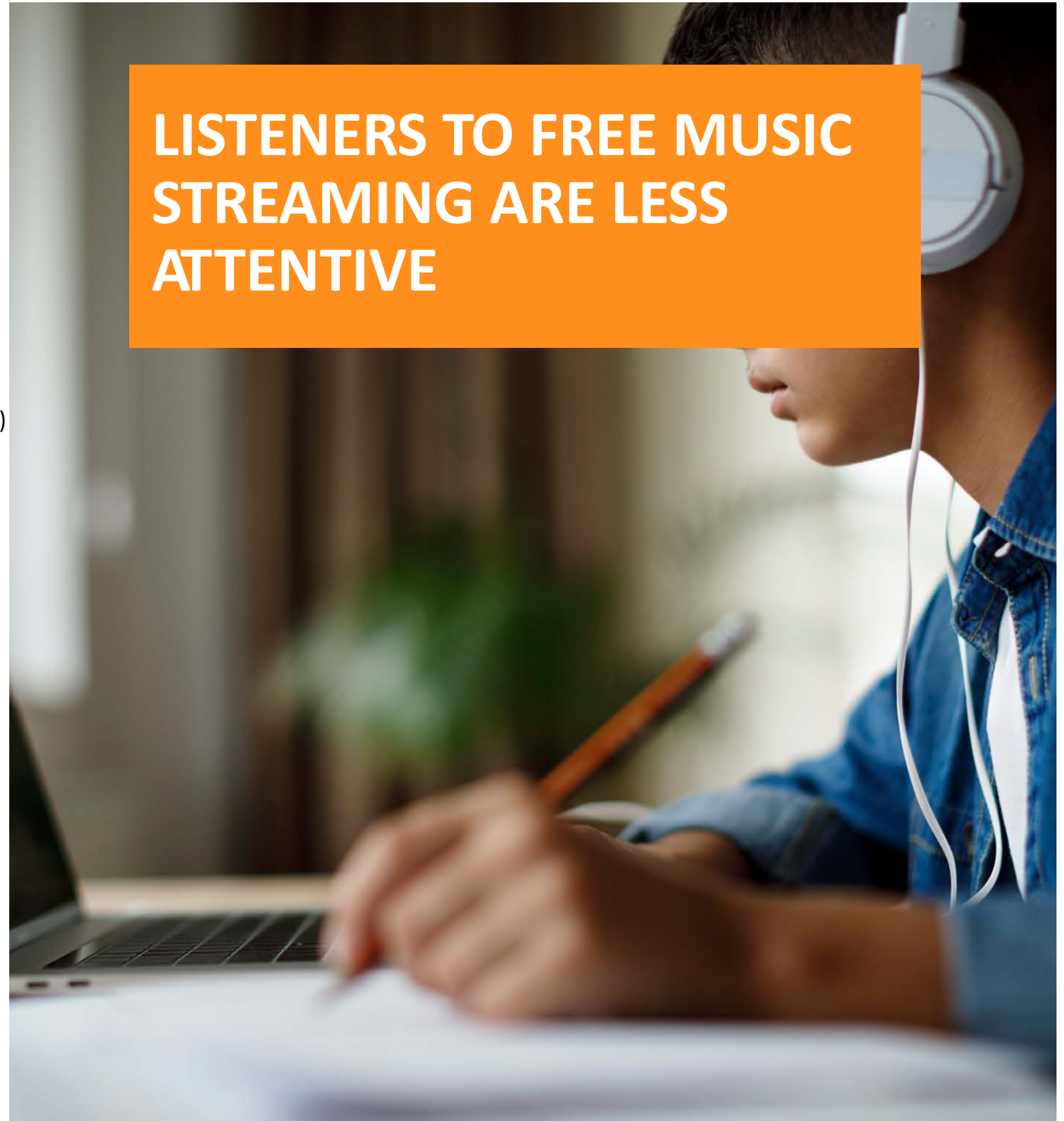
Source: Signal Hill Insights Fall 2024

Those who stream **Free Music** experience a **less-engaging** version of what Paid Streaming offers them, **sitting more in the background** than foreground of their needs.

— Paid Music Streaming (without ads) — Free Music Streaming (with ads)

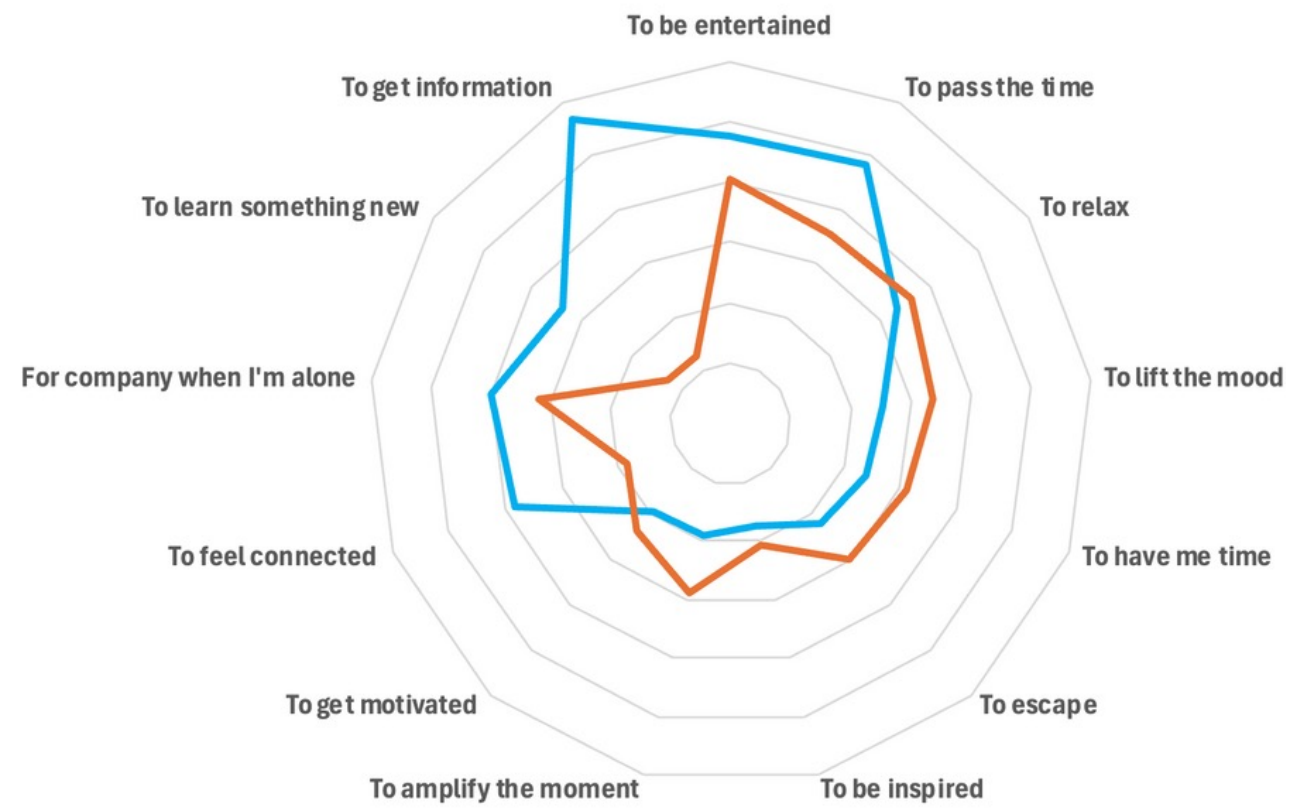


Source: Signal Hill Insights Fall 2024



LISTENERS TO FREE MUSIC STREAMING ARE LESS ATTENTIVE

— AM/FM Radio — Free Music Streaming



Radio listeners are actively engaging and focusing on what they hear. While free music streaming offers a chance to disconnect, Radio audiences choose to **tune in for connection and interaction.**

AM/FM CONNECTS LISTENERS WITH ENTERTAINMENT, INFORMATION AND COMPANIONSHIP



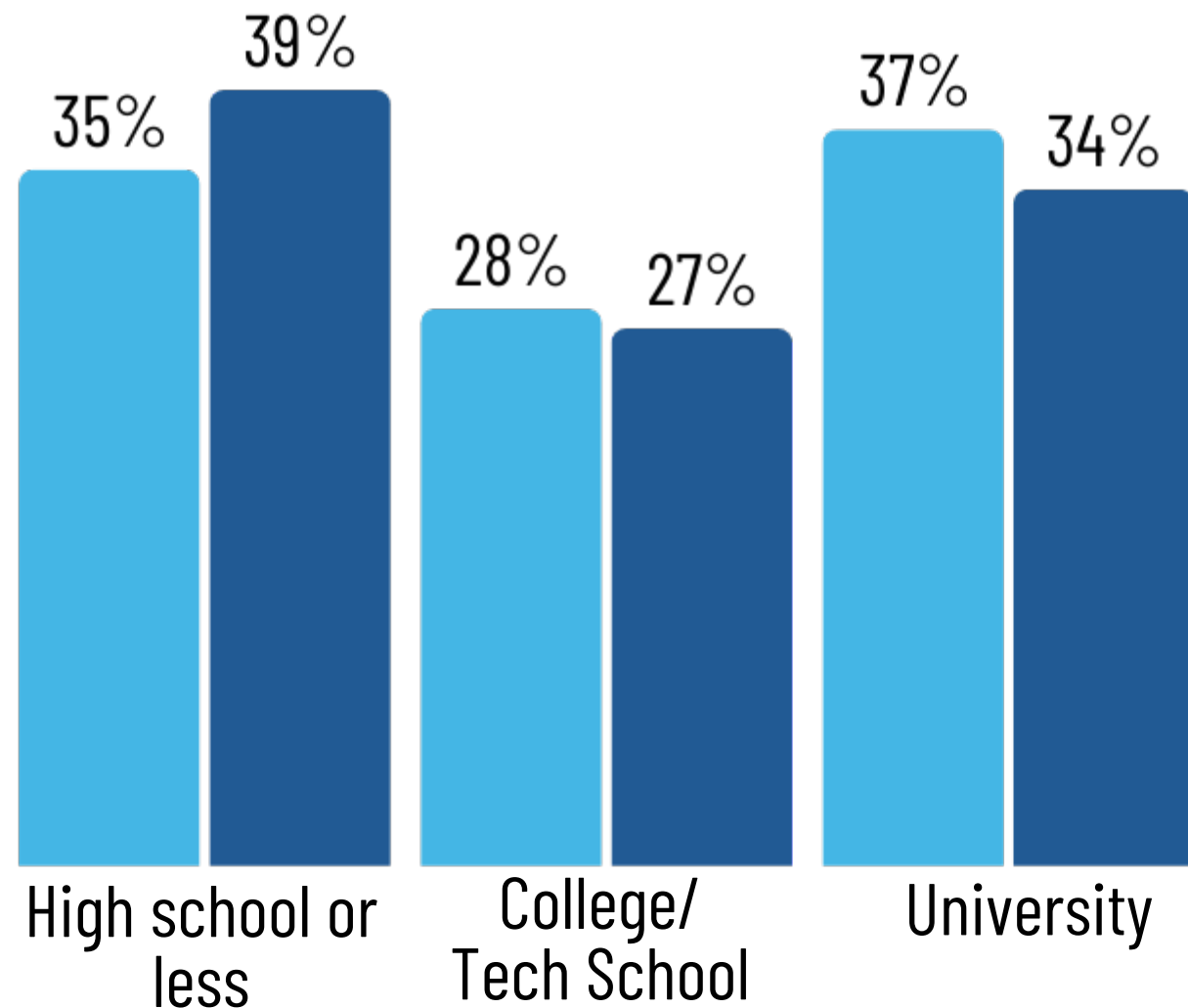
Smartphones are Increasingly Becoming the Primary Device for Streaming Live Radio

Tablets have also seen an increase in usage among people streaming AM/FM Radio.

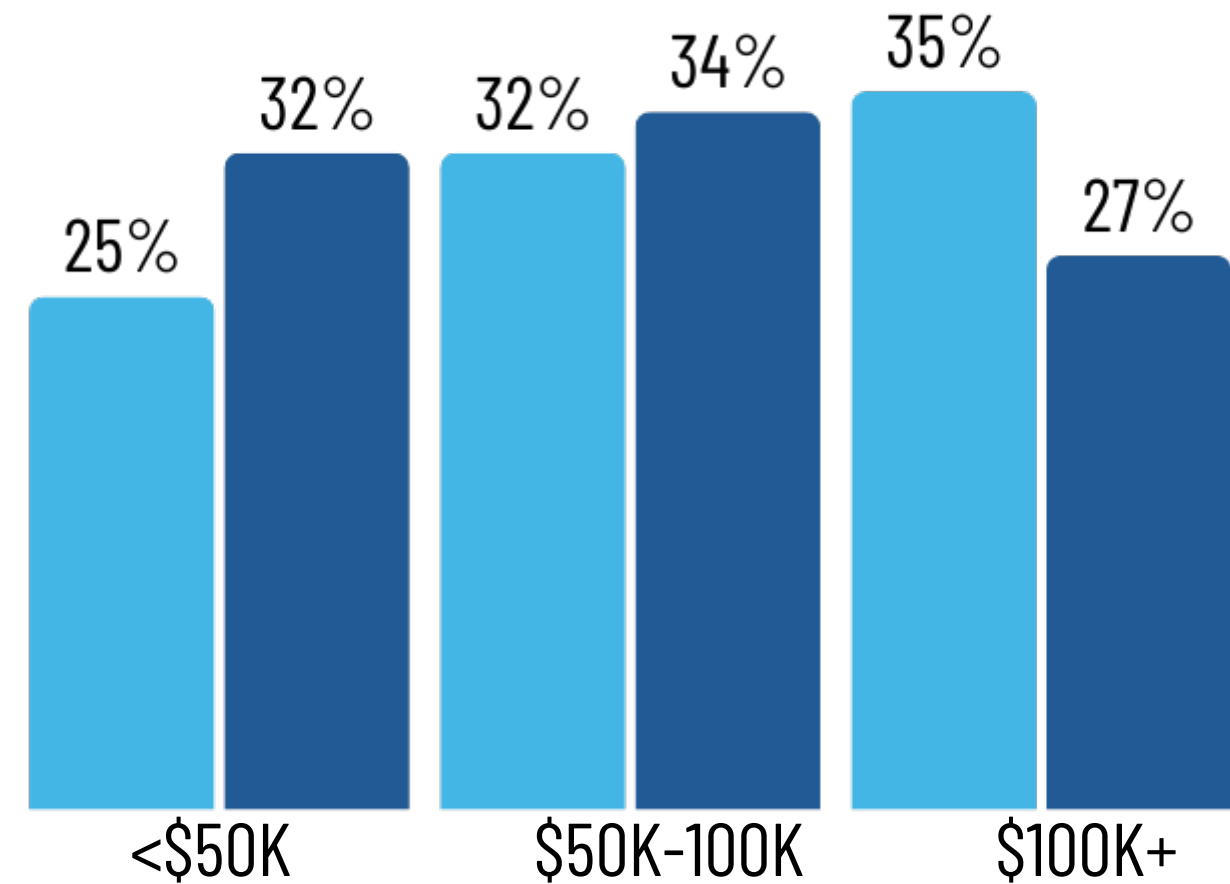


Streamed AM/FM Radio Engages Audiences That are Attractive for Advertisers

Streamed **Radio** reaches more higher **income** and educated earners



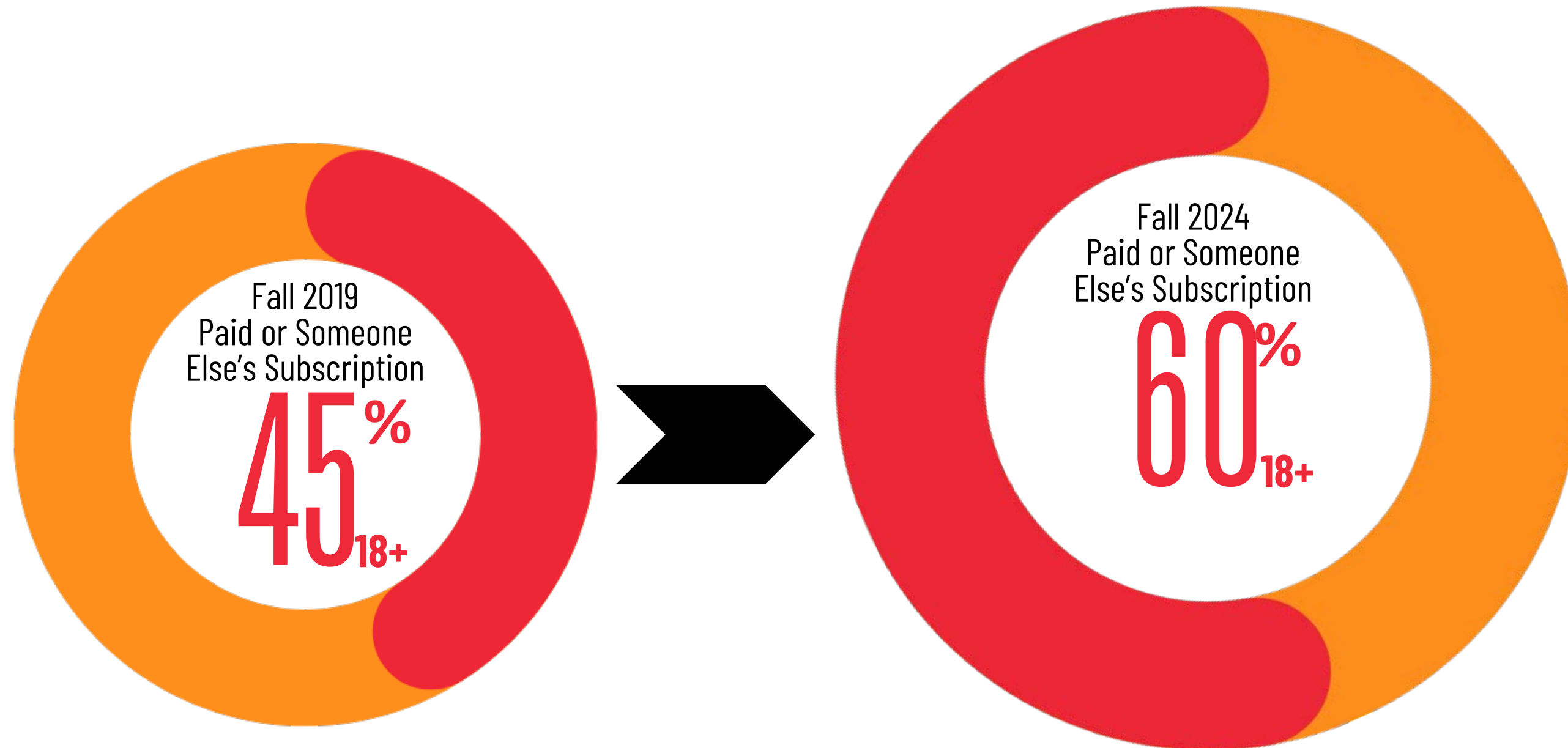
Whereas, **Free Streaming** attracts **younger, less affluent** and educated audiences.



STREAMED RADIO

FREE MUSIC STREAMING

Since its launch, Spotify has experienced a **consistent rise** in users **upgrading to its paid service**. This trend mirrors the **growing preference** among some Canadians for **‘renting’ their personal music collections** rather than owning them.



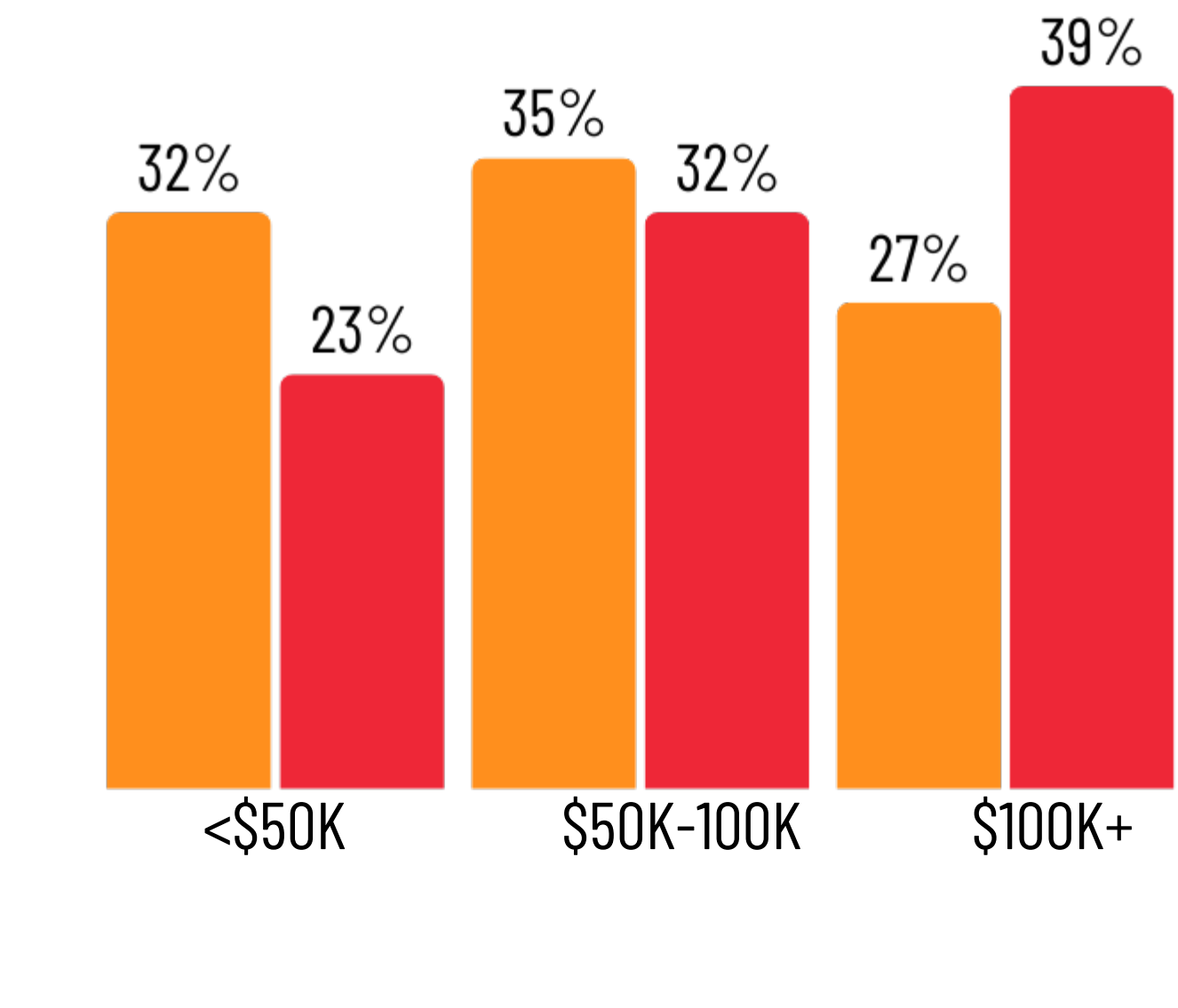
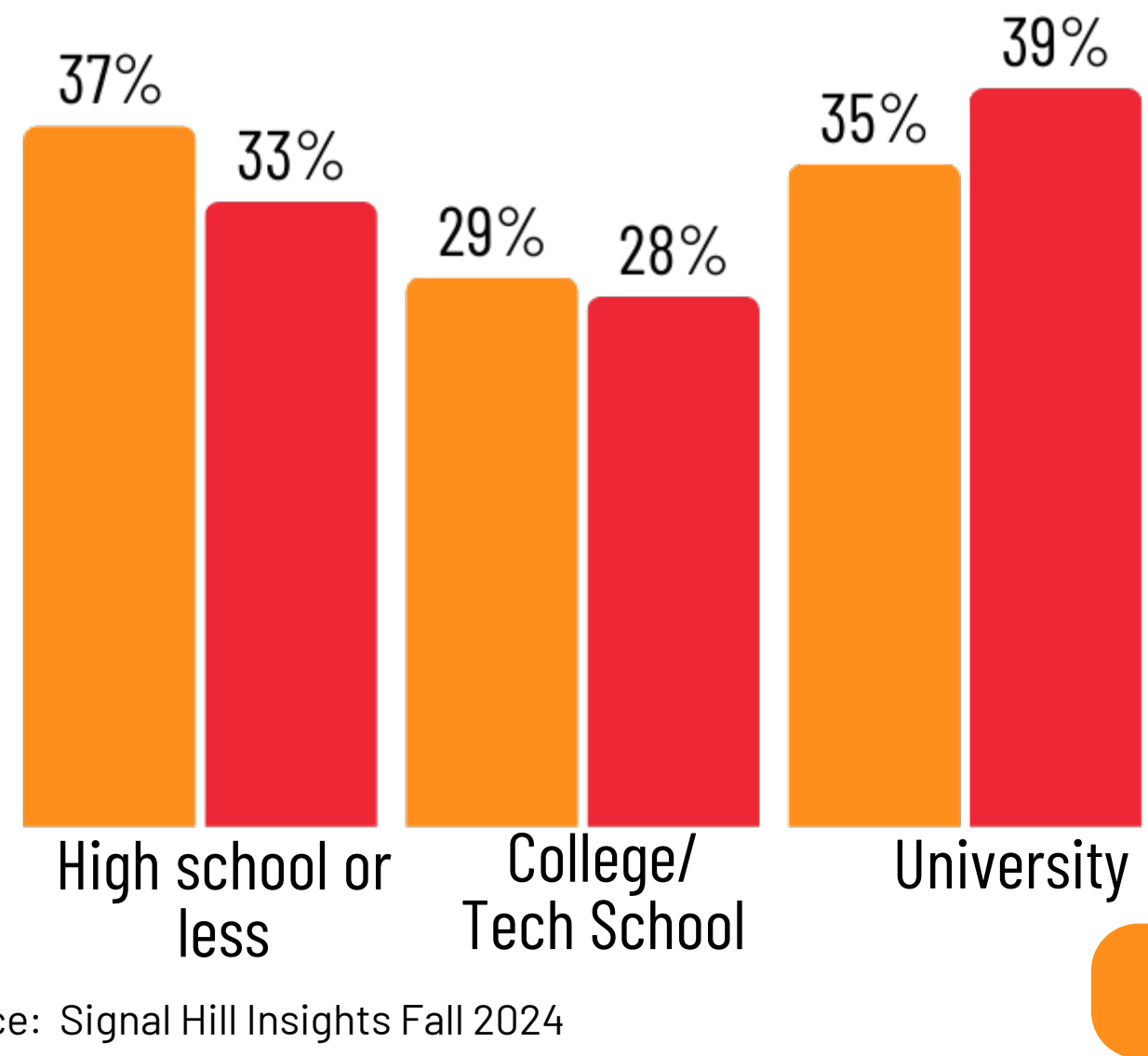
THE MORE DESIRABLE SPOTIFY USERS ARE INCREASINGLY HARD TO REACH WITH ADVERTISING

Source: Signal Hill Insights Fall 2024

Free Spotify users generally exhibit **lower levels of education** and **household income** when compared to those who subscribe to the paid service.

Users of the **Free Spotify** users have **less education** and **lower incomes**

Users of the **Paid Spotify** service have **higher household incomes** than Free Spotify users



Source: Signal Hill Insights Fall 2024

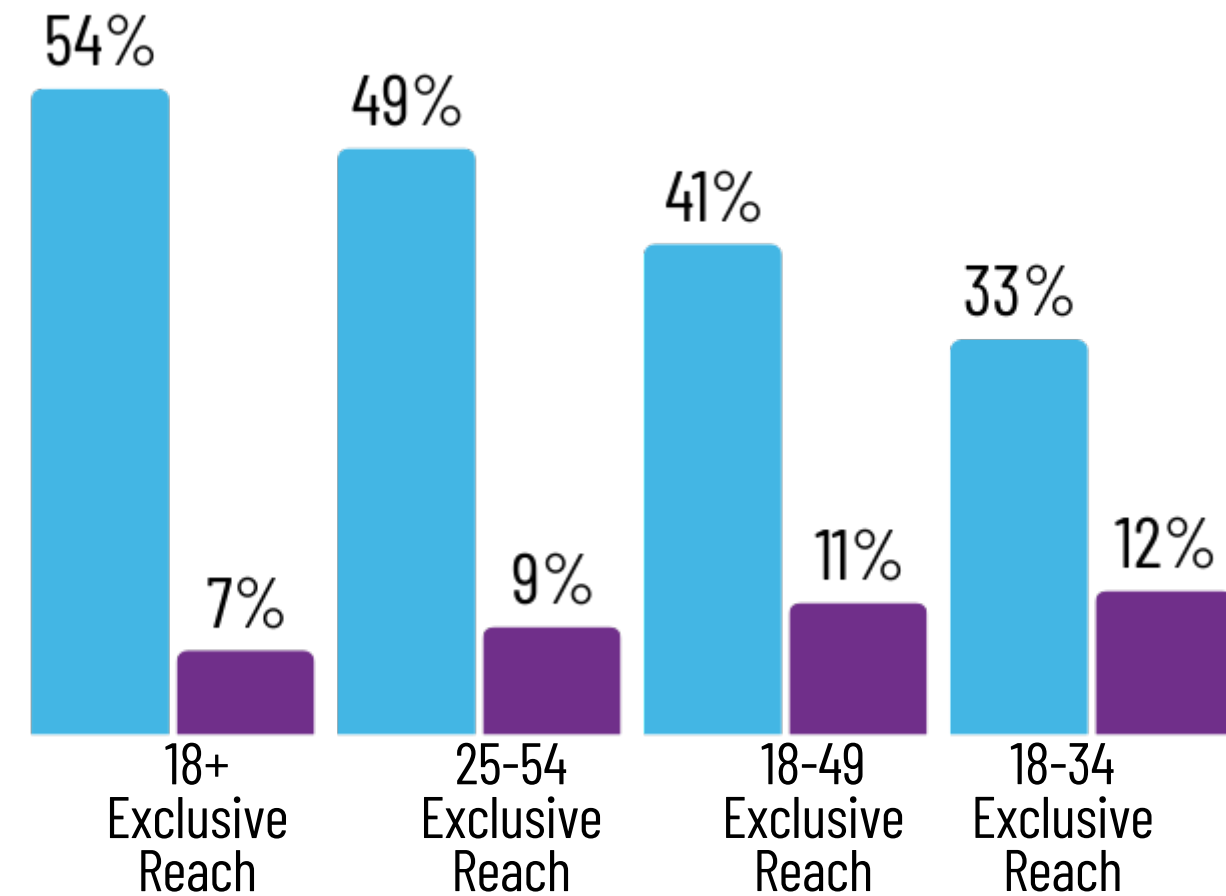
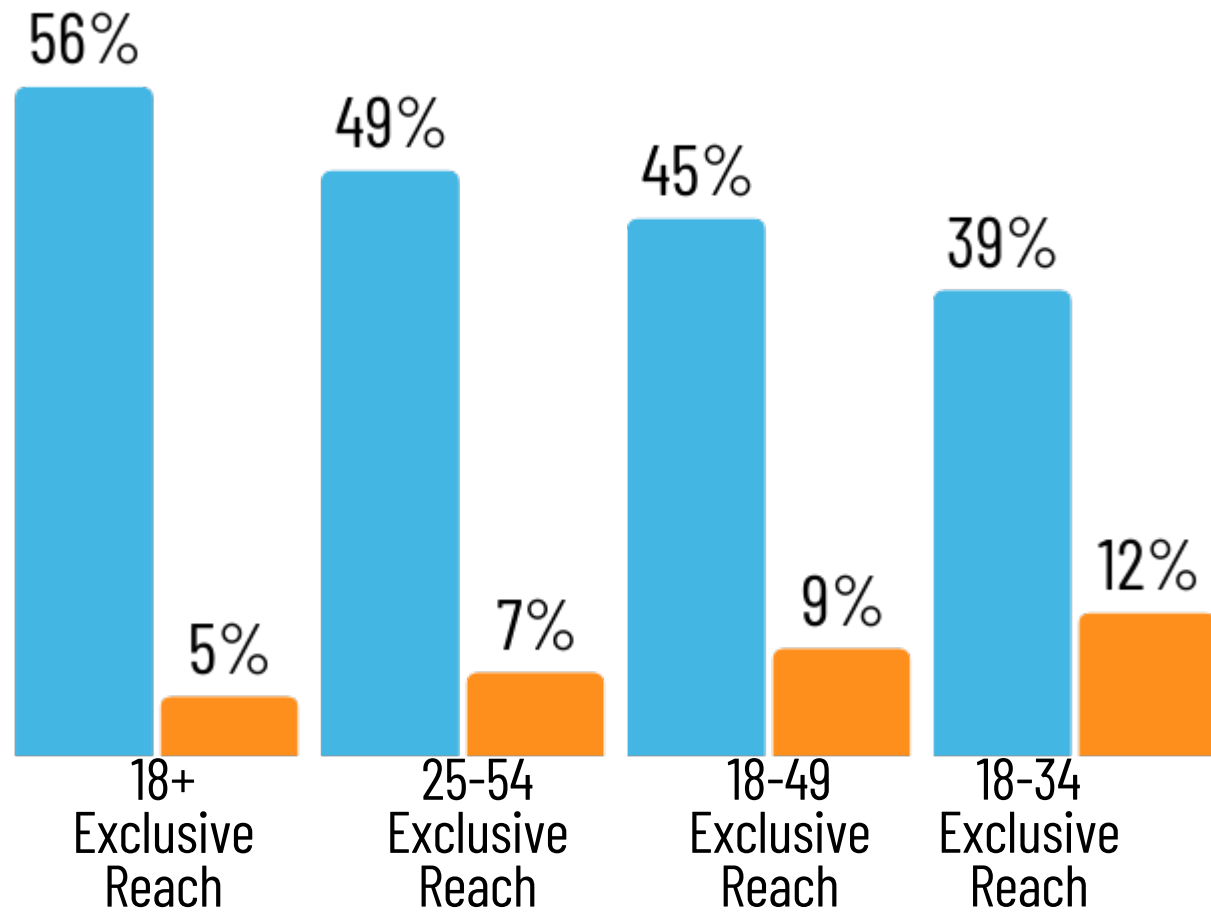
Whether Free Spotify or Podcast, **Live Radio has more exclusive listeners** than any other ad-supported audio platform.

Live Radio has more than **11x the amount of listeners who only listen to Radio**, compared to Spotify where only **5% of listeners listen to Free Spotify exclusively**.

Even for 18-34s, almost **40% exclusively listen to Radio only**, vs. **12% listening to Free Spotify only**. This indicates that a substantial portion of this **younger audience primarily listens to Radio**, contrary to common perceptions among some advertisers that digital platforms is the only media they engage with.

Live Radio has nearly **8x the amount of listeners who only listen to Radio**, compared to 7% of 18+ who only listen to podcasts

For **18-49s**, Live Radio has almost **4x the number of listeners to Radio only vs. listening to podcasts exclusively**. Among **18-34s**, only **12% listen to podcasts** and not Radio, but a **third listen to Radio and don't listen to podcasts**.



Source: Signal Hill Insights Fall 2024

AM/FM RADIO

FREE SPOTIFY

PODCASTS

Key Takeaways

BROADCAST RADIO IS DIGITAL



The number of **Canadians streaming Live Radio** is **growing** every year delivering advertisers **the same targeting capabilities** as pure plays.

STREAMING MUSIC MEANS DISCONNECTING



Paid Music, Free Music Streaming and Owned music fulfill the **same needs states**, helping listeners **disconnect** while **Radio** fulfills the need for **connection and company**.

SMARTPHONES ARE TAKING RADIO MOBILE



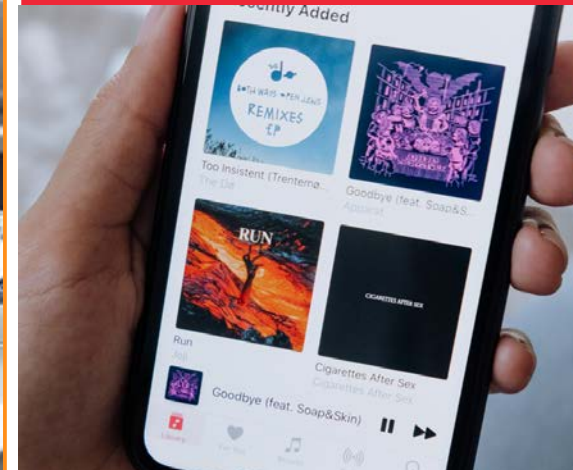
Smartphones are **growing** as the **digital device** of choice to **stream Live Radio**.

RADIO STREAMERS ARE A PREMIUM AUDIENCE



Streamers of AM/FM Radio are typically **more educated** and earn a **higher income** than Free Music Streamers.

MORE USERS PAY FOR SPOTIFY



Spotify continues to gain **more paid users**, making their more **premium users increasingly harder to reach**.

RADIO HAS MORE EXCLUSIVE LISTENERS




More **Canadians only listen to Live Radio** versus **only listen to Free Spotify** or **Podcasts**. So, relying on only **Free Music Streaming** or **Podcasts** as an audio strategy will **deliver very few listeners** in comparison to using **Radio**.




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