

RADIO
CONNECTS

Rediscover the Power of

LIVE RADIO

2025





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.

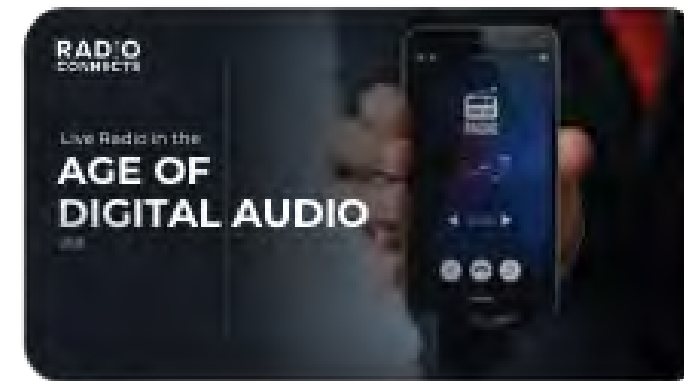
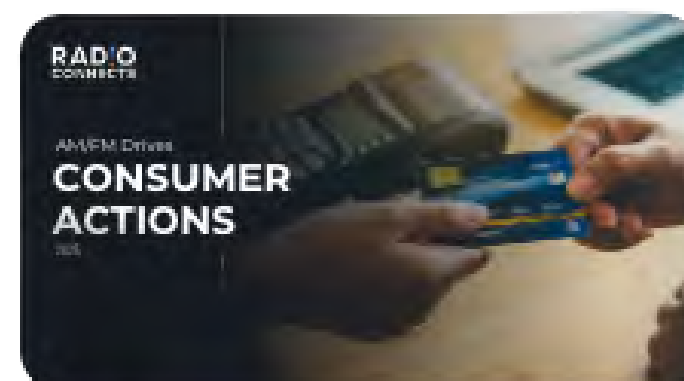
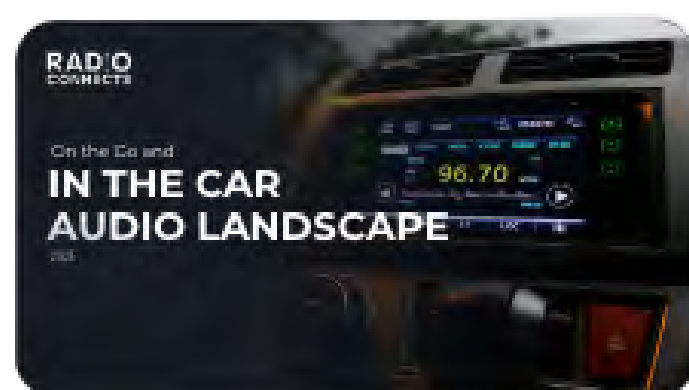
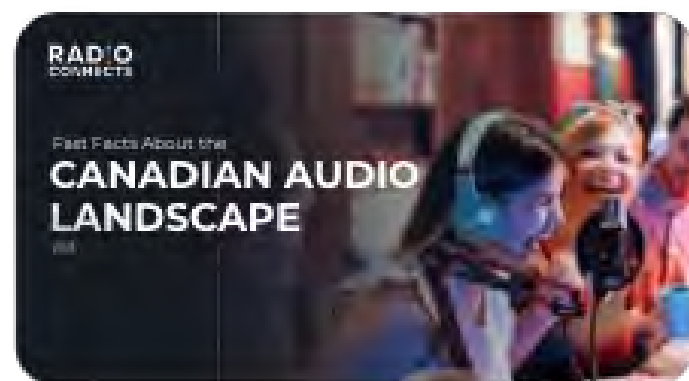
For advertisers and marketers, this report serves as a valuable resource to understand how Live Radio continues to be a dominant and effective medium for connecting with audiences, influencing purchasing decisions, and achieving measurable advertising success in today's competitive market.

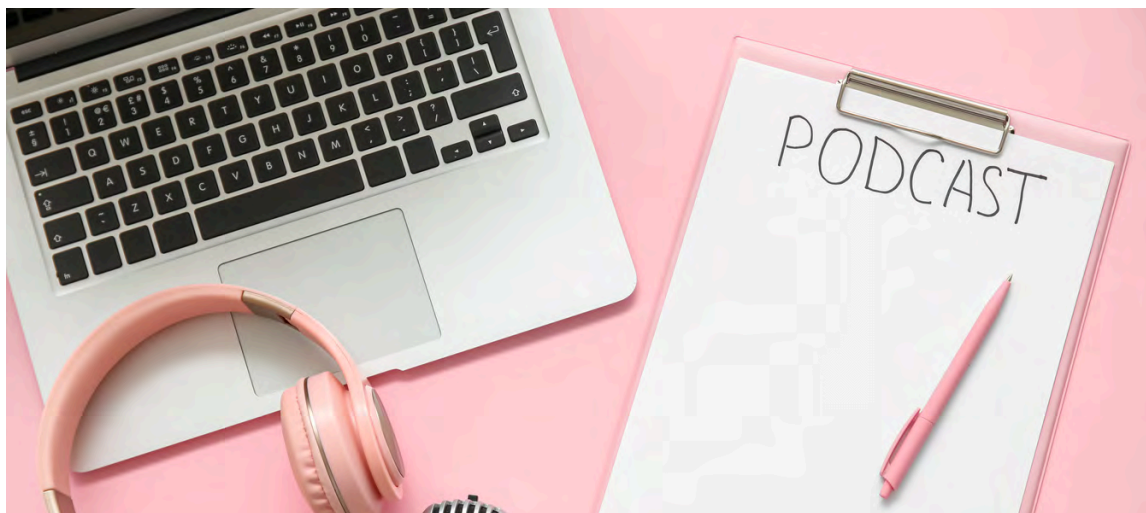
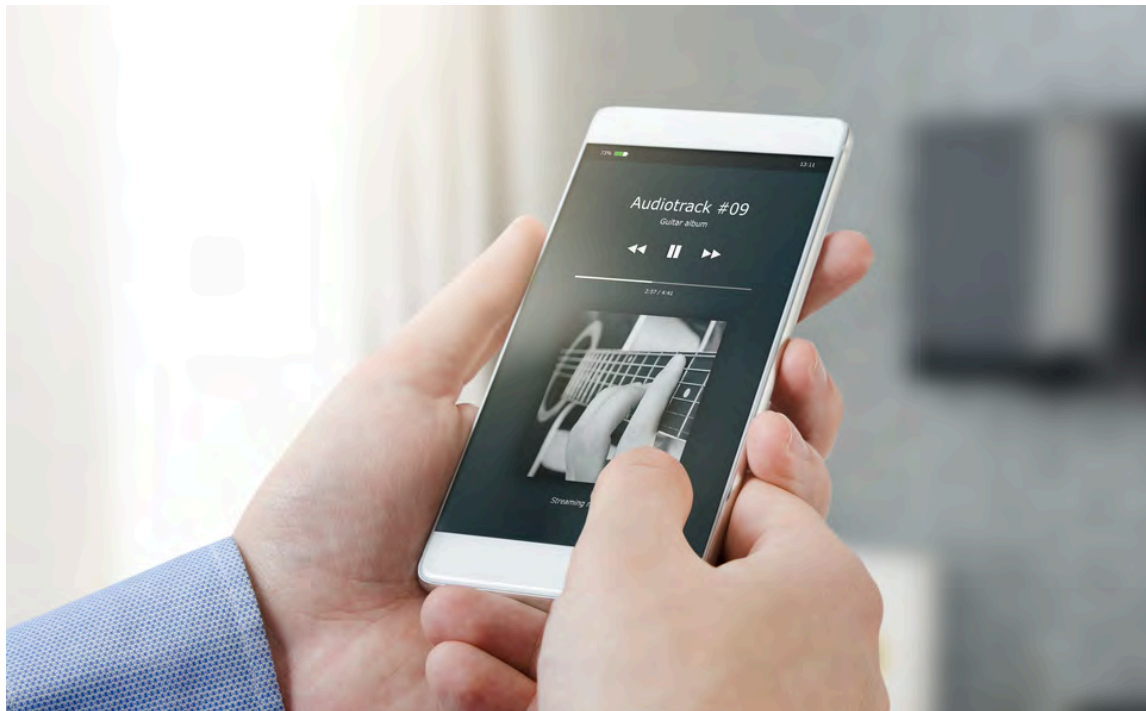
In addition to data sourced from Numeris and their RTS survey, insights have been generated from a questionnaire fielded in September 2024 by Signal Hill Insights to a Maru Voice Canada panel of over 3,000 Canadians.

Canadian Broadcast Radio

Whether a busy urban city or a close-knit community, Live Radio serves as the ultimate connector. Acting as a constant companion, it offers not only entertainment through music but also enriches listeners with insightful ideas and essential news. Moreover, it delivers critical updates that keep Canadians safe—all at no cost to the listener. Accessible over-the-air or via connected devices, Live Radio uniquely combines expansive reach with a personal touch, making it the most inclusive and familiar audio platform available to advertisers looking to engage with the widest possible audience.

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





Ipsos Canada Ad Nation Study:

Radio in Canada: Perception vs. Reality

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Get the full report [here](#)

What the study revealed about time spent listening to Radio on an average day:

The Facts

Canadians **dedicate 2X more time listening to the Radio** each day compared to those in the advertising profession. Additionally, they spend **15% more time** with AM/FM Radio than what the ad community estimates. Live Radio reaches more than **52% of Canadians each day** in PPM markets, which is over **556,000 listeners every minute**. This totals more than **8 million Canadians aged 12+ each day** in **just Toronto, Montreal, Calgary, Edmonton, and Vancouver** that are tuned-in on a daily basis.



On an average day, marketing and advertising professionals spend **48 minutes** listening to Radio, which is around half of the time that Canadians spend.



Those who work in the ad industry perceive that Canadians are only listening for **78 minutes** a day, a shortfall of 12 minutes.



In reality, Canadians report listening to Live Radio for **90 minutes** on an average day.

Source: Ipsos Canada Ad Nation 2023 | * Numeris Fall PPM TC AW 2a-2a, 12+

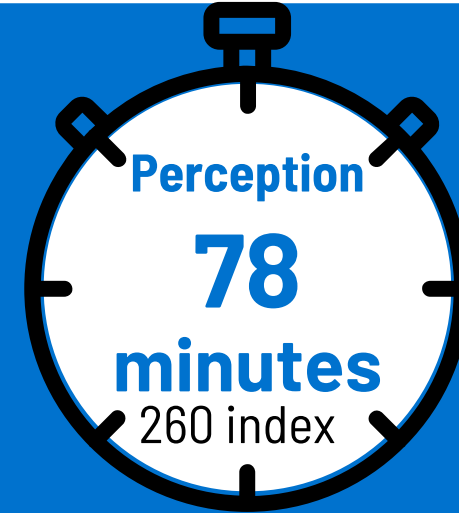
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Canadians spend **much less time listening** to streamed music compared **to the ad industry**, and **not nearly as much** as **the ad industry thinks** they do. The advertising and marketing professionals surveyed by Ipsos Canada, had the perception that Canadians spend more **than 2X the amount of time streaming music** than they actually do. In reality, **most of the music streaming** done by Canadians is to **their own non-commercial digital music libraries**. For **advertisers** trying to reach Canadians with **an audio message**, Live **Radio is the only medium** with the **scale** to do so. **7 out of every 10 minutes*** Canadians 18+ spend with **ad-supported audio** is spent listening to **Live Radio**.



On an average day, those surveyed who are engaged in advertising and marketing spend almost 1 hour and 45 minutes streaming music.



They perceive that Canadians are spending over 2 hours a day, which is 2.2x more than Canadians actually spend streaming music on an average day.



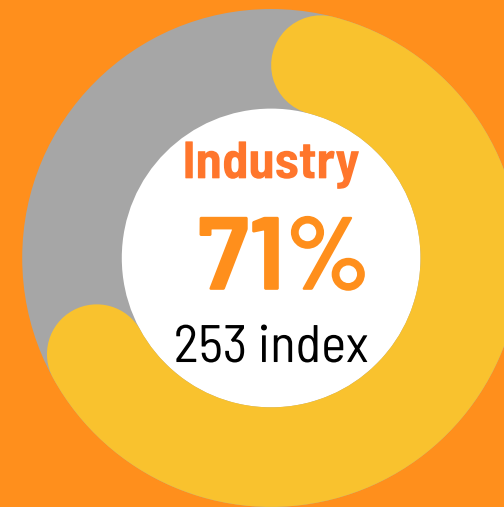
In truth, Canadians indicate that they stream music for just 60 minutes each day, which is significantly less than what those in the industry perceived.

Source: Ipsos Canada Ad Nation 2023 | *Signal Hill Insights Fall 2024

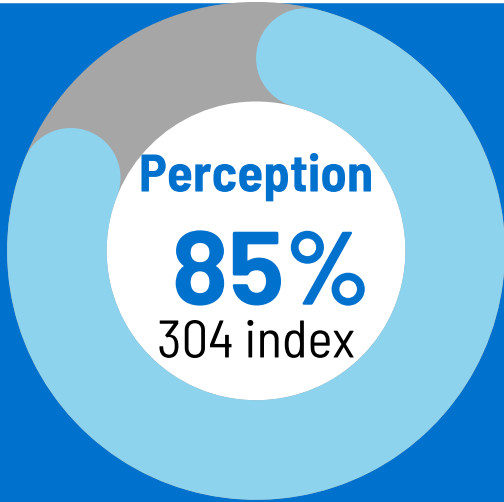
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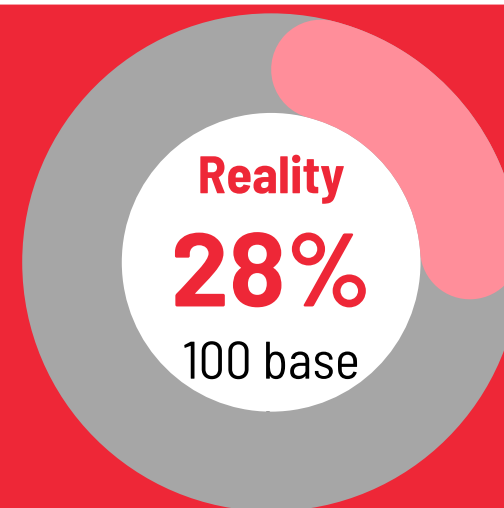
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On an average day, **71% of the marketing and advertising professionals surveyed say they accessed the Spotify app in the past month.**



They perceive that 85% of Canadians used the Spotify app in the past month, which is 3X more than the number of Canadians that said they did.



In fact, less than 3 in 10 Canadians accessed the Spotify app in the past month, and of Canadians using it, 60% of them are using the premium paid subscription.

Source: Ipsos Canada Ad Nation 2023 | *Signal Hill Insights Fall 2024

Key Takeaways

IN THE AD-SUPPORTED AUDIO LANDSCAPE



7 out of every 10 minutes is dedicated to **Live AM/FM Radio**, solidifying it as the **dominant audio platform** for reaching adults in Canada

WHEN CANADIANS GET BEHIND THE WHEEL



Live **Radio leads** in **in-car audio consumption**, even in vehicles equipped with the latest technologies, **capturing almost 90% of in-car audio time.**

RADIO ADS ARE EFFECTIVE



A significant proportion of **listeners take action** after hearing **ads on the Radio**, ranging from learning about **new products** to **visiting businesses** to **making purchases.**

CANADIANS TRUST RADIO ADS



More than digital formats and **value local content**, making Live Radio a **preferred** medium for **community and local business support.**

STREAMED LIVE RADIO



Continues to **gain reach**, offering **addressable audio listeners** to advertisers on a platform seen as **trustworthy** by Canadians

RADIO COMPLIMENTS TV CAMPAIGNS

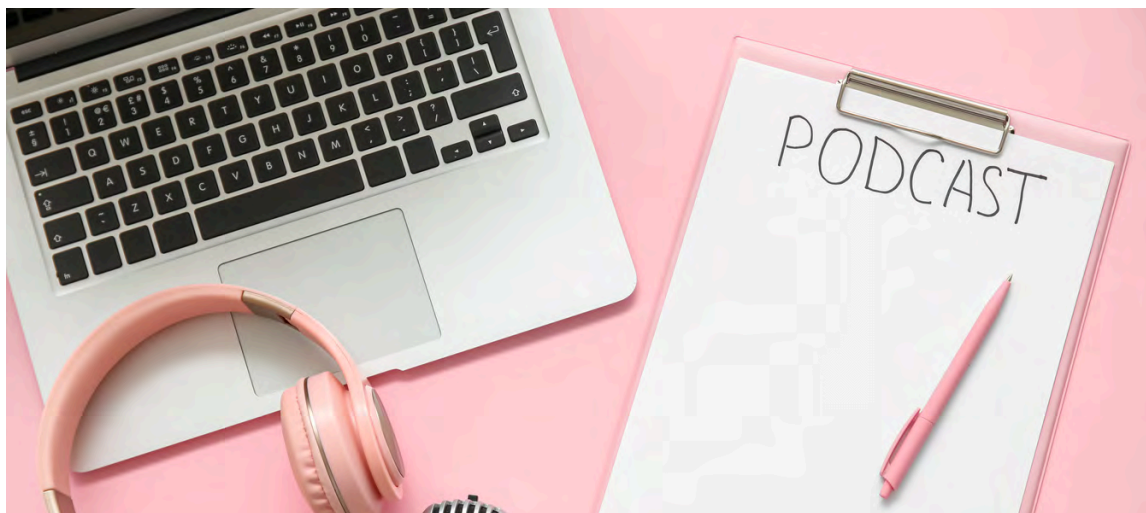
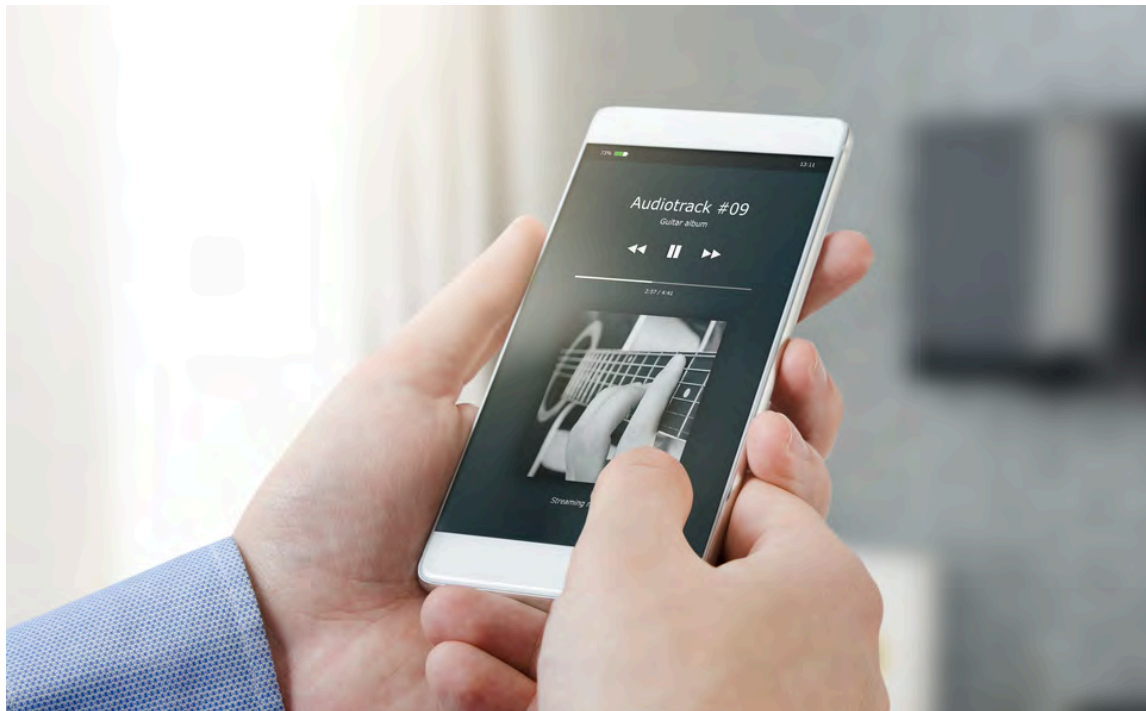


Extending Reach and Frequency to **maximize** advertising **impact** across key demographics.

Fast Facts About the
CANADIAN AUDIO
LANDSCAPE

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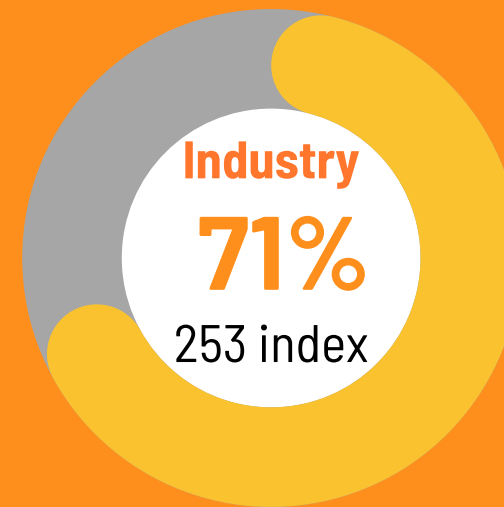
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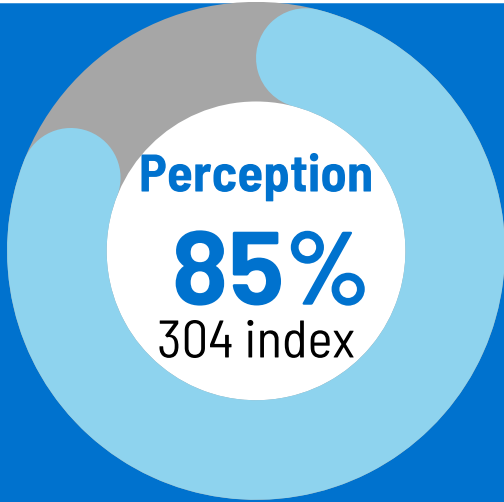
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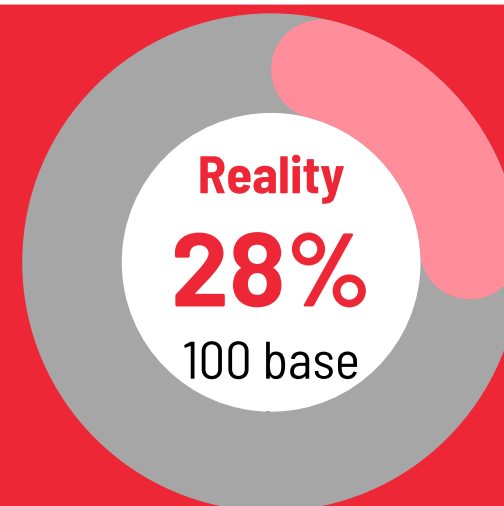
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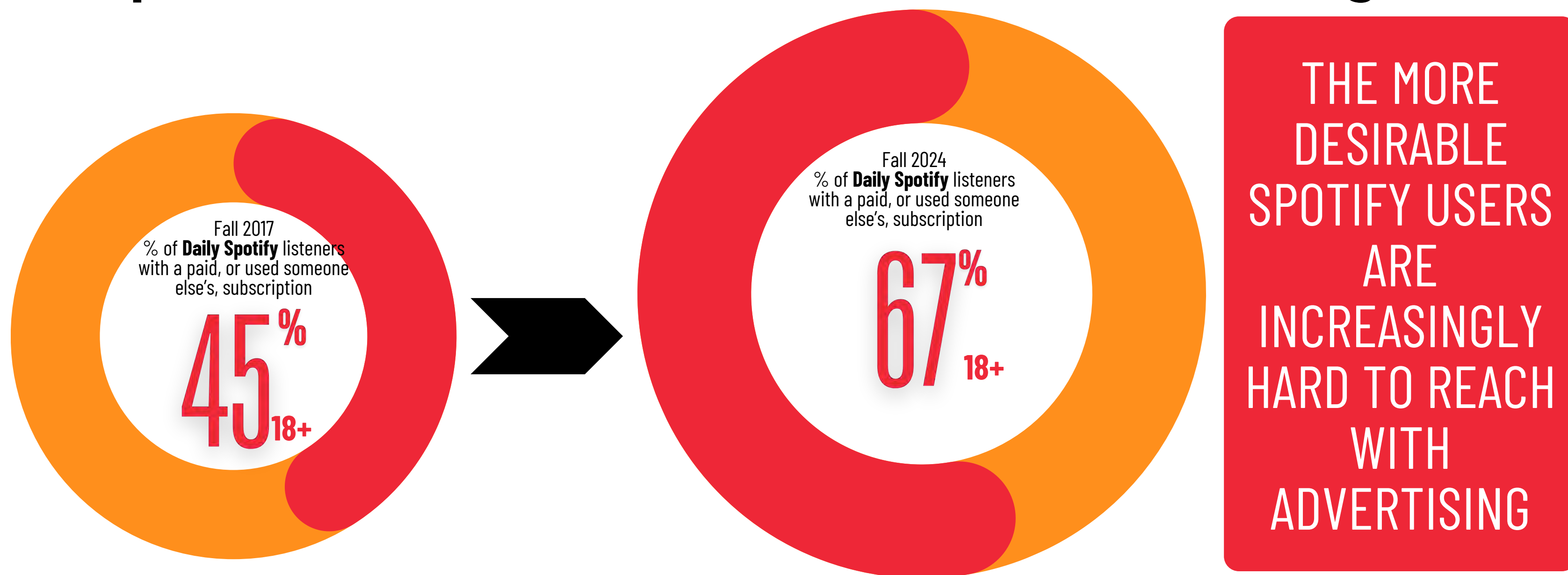
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Source: Ipsos Canada Ad Nation 2023 | *Signal Hill Insights Fall 2024

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.



Source: Signal Hill Insights Fall 2024

Broadcast Radio in Canada

**716 COMMERCIAL
RADIO STATIONS**



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

Source: CRTC 2023

**CANADA IS ONE
OF THE LARGEST
RADIO MARKETS**



**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

**OVER 1B DOLLARS
GENERATED IN
ADVERTISING
REVENUE**



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

Source: CRTC 2023

**LOCAL RADIO
DRIVES BUSINESS
SUCCESS**



**67% of Radio
Revenue is driven by
local sales**

Source: CRTC 2023

Fast Facts

LIVE RADIO'S REACH IS UNBEATABLE



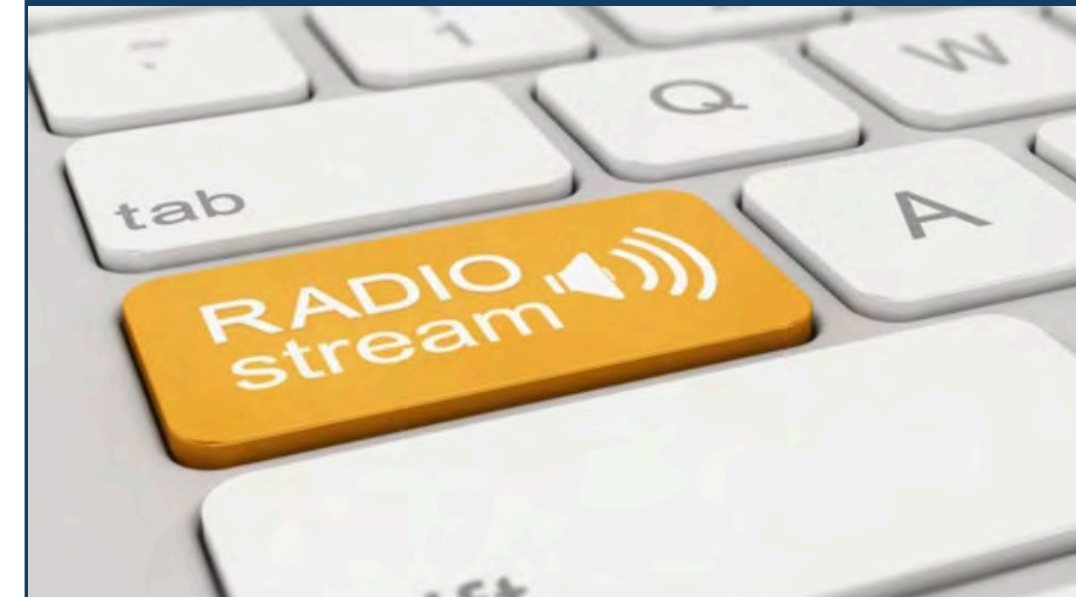
Live Broadcast Radio reaches 82% of Canadians each week and over 54% each day. Canadians are tuning in for almost 8 hours a week in PPM markets, and even longer outside of major urban centres.

LIVE RADIO'S HAS THE BIGGEST SHARE OF BUYABLE AUDIO



7 out of every 10 minutes spent with ad-supported audio is spent with Live Radio, highlighting Radio's unparalleled ability to reach mass audiences effectively and consistently.

LIVE BROADCAST RADIO IS DIGITAL



Since Fall 2019, the proportion of AM/FM hours that are streamed has increased from 9% to 14%, with an increasing number of Canadians tuning into AM/FM Radio streams via their smartphones

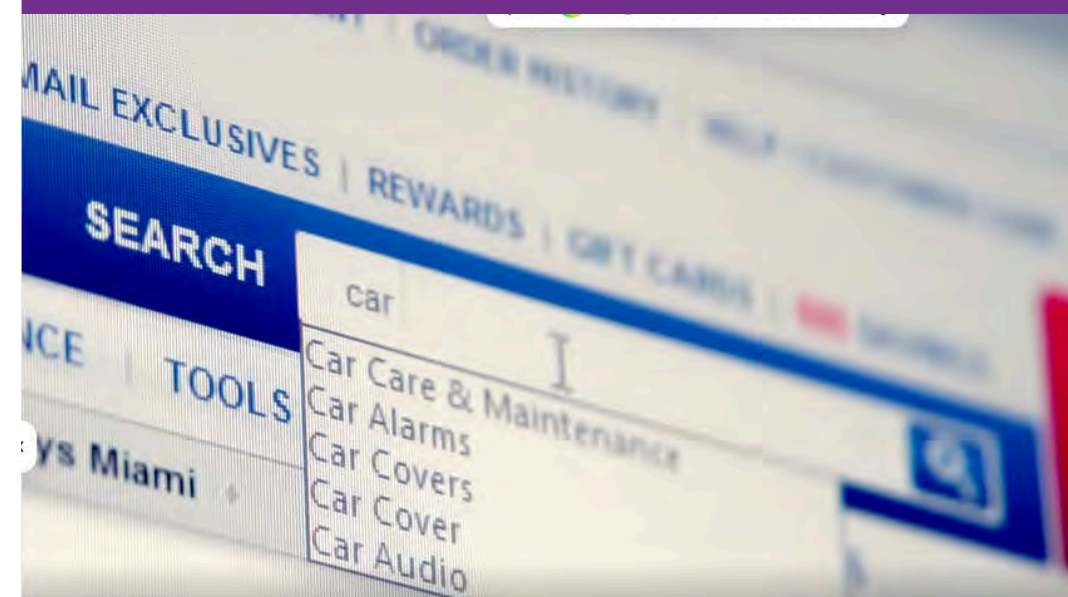
Fast Facts

LIVE RADIO'S RULES THE ROAD



AM/FM Radio has nearly 90% of the buyable audience available to reach Canadians in their cars. 53 minutes of every in-car audio hour is spent tuned to Live AM/FM Radio, the ultimate path to purchase medium that provides a captive audience for advertisers.

CANADIANS RESPOND TO ADS THEY HEAR ON LIVE RADIO



Nearly half (45%) of 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.

SIGNIFICANTLY MORE EXCLUSIVE REACH THAN FREE SPOTIFY DIGITAL



56% of Canadians 18+ listen to Live Radio and not Free Spotify vs. 5% who listen to Free Spotify and not Live Radio



Measurement

There are 3 different types of measurement used to generate over-the-air Broadcast Radio audiences. While PPM's can provide an indication of streamed numbers, most Broadcasters are able to identify their own streamed data.

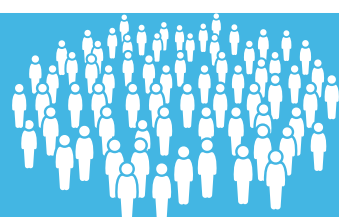
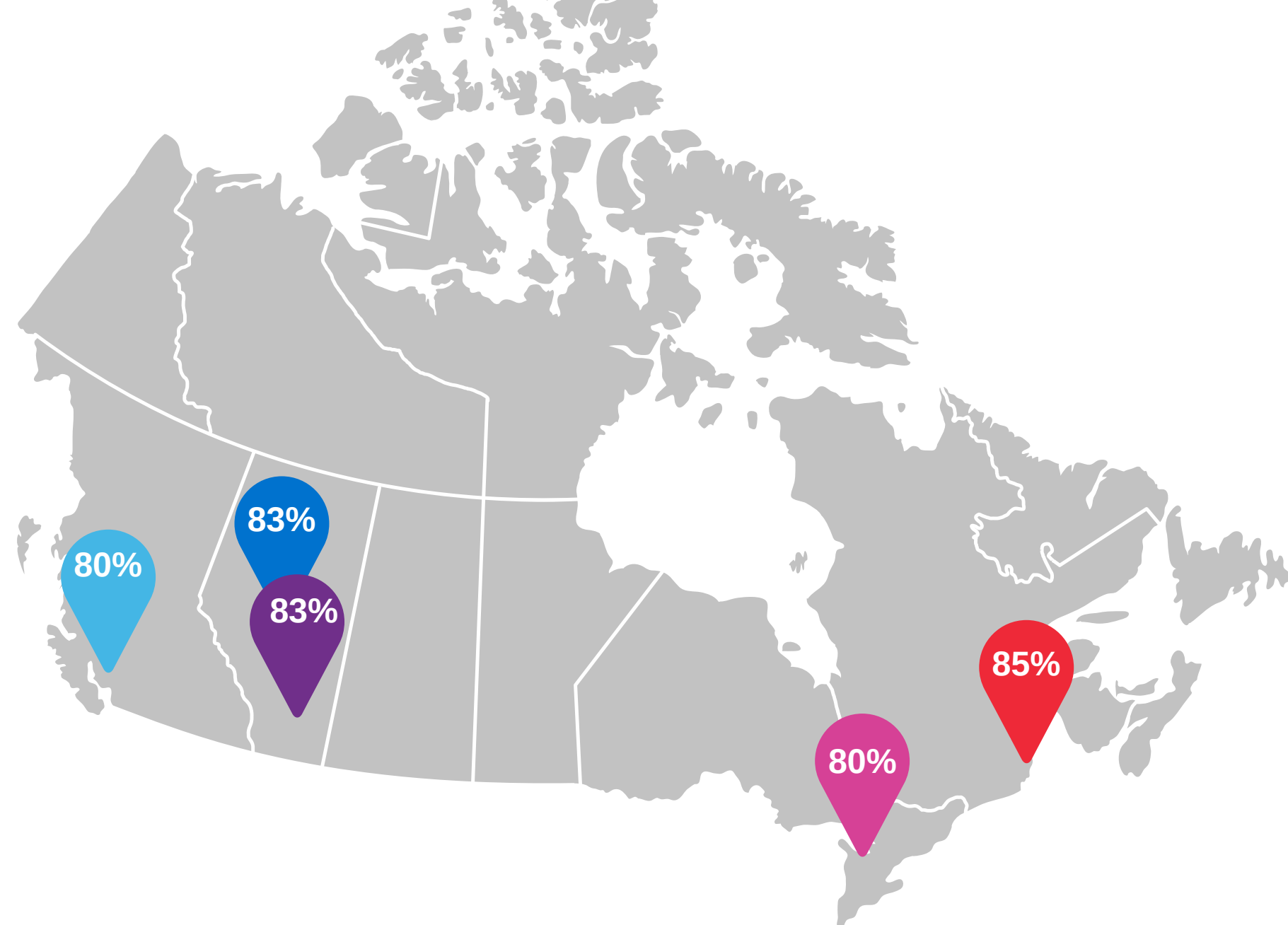
01 Numeris Portable People Meters PPMs
Passive measurement in 5 of Canada's largest cities, representing apx. 44% of the population. Data is released in 13-week cycles.

02 Numeris Online Diaries
Measurement of 22 of the "B" markets in Canada most often bought by national advertisers. Based on weekly measurement using an online diary, but excludes the last week of January, first week of July, and last week of December. Surveys are typically released in the Fall and Spring.

03 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.

Live Radio's Scale Connects with Canadians Everywhere

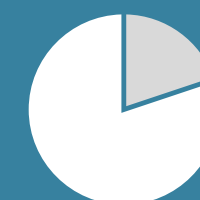
AM/FM Radio is the only audio platform that can deliver **commercial messaging** minute by minute, **at scale**.



Live Radio connects with over **14.4 million people each week**, across the 5 PPM Markets, representing **44%** of the total Canada population.¹

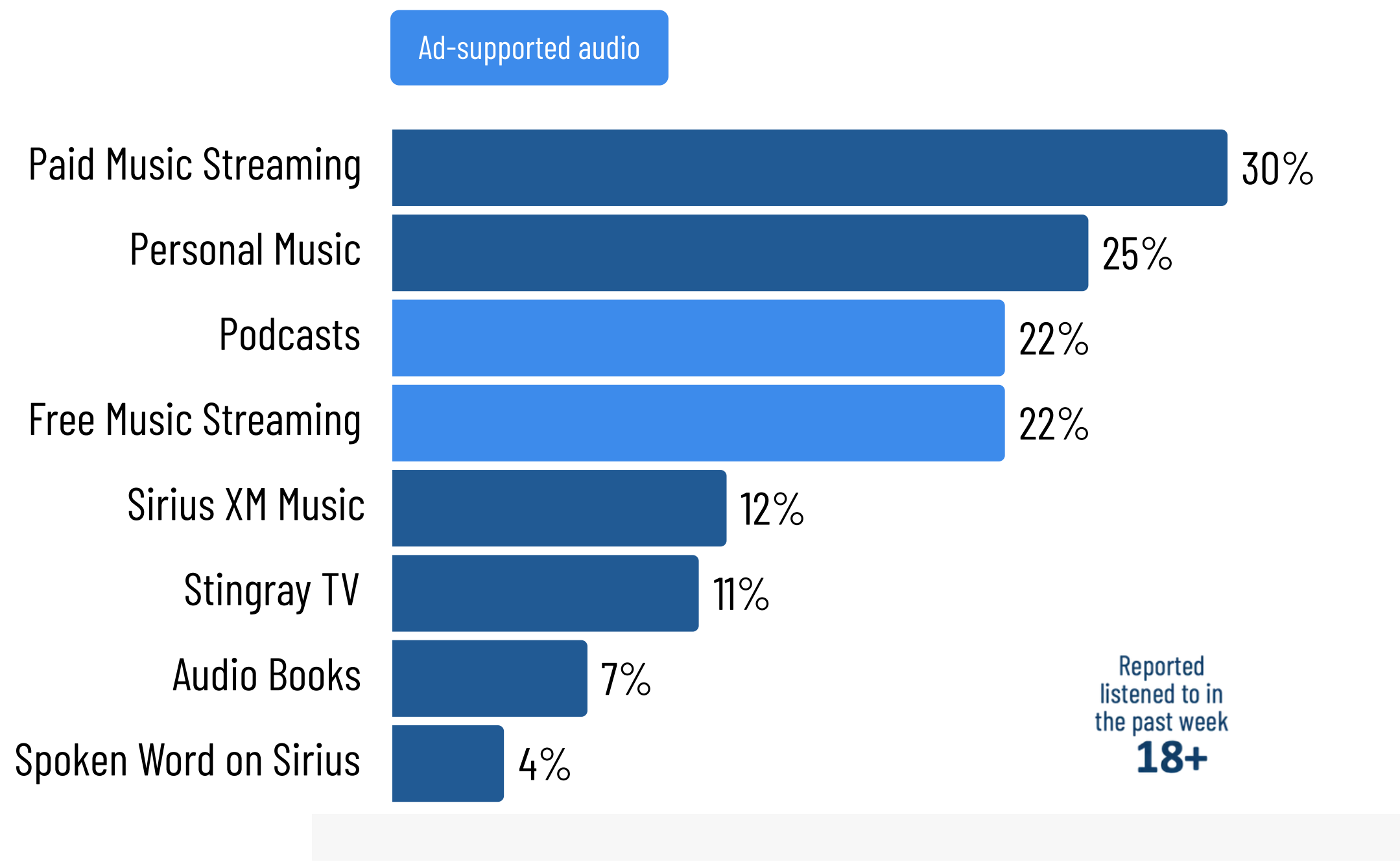


On average, that's over **590,000 people** in the PPM markets tuned into Live AM/FM every minute.¹



7 out of every 10 minutes Canadians 18+ spend with ad-supported audio is spent with Live Radio. And in the car, **53 minutes of every hour** listening to ad-supported audio is spent with Radio.²

Compared to Other Audio, Live Radio is the Reach Machine for Advertisers



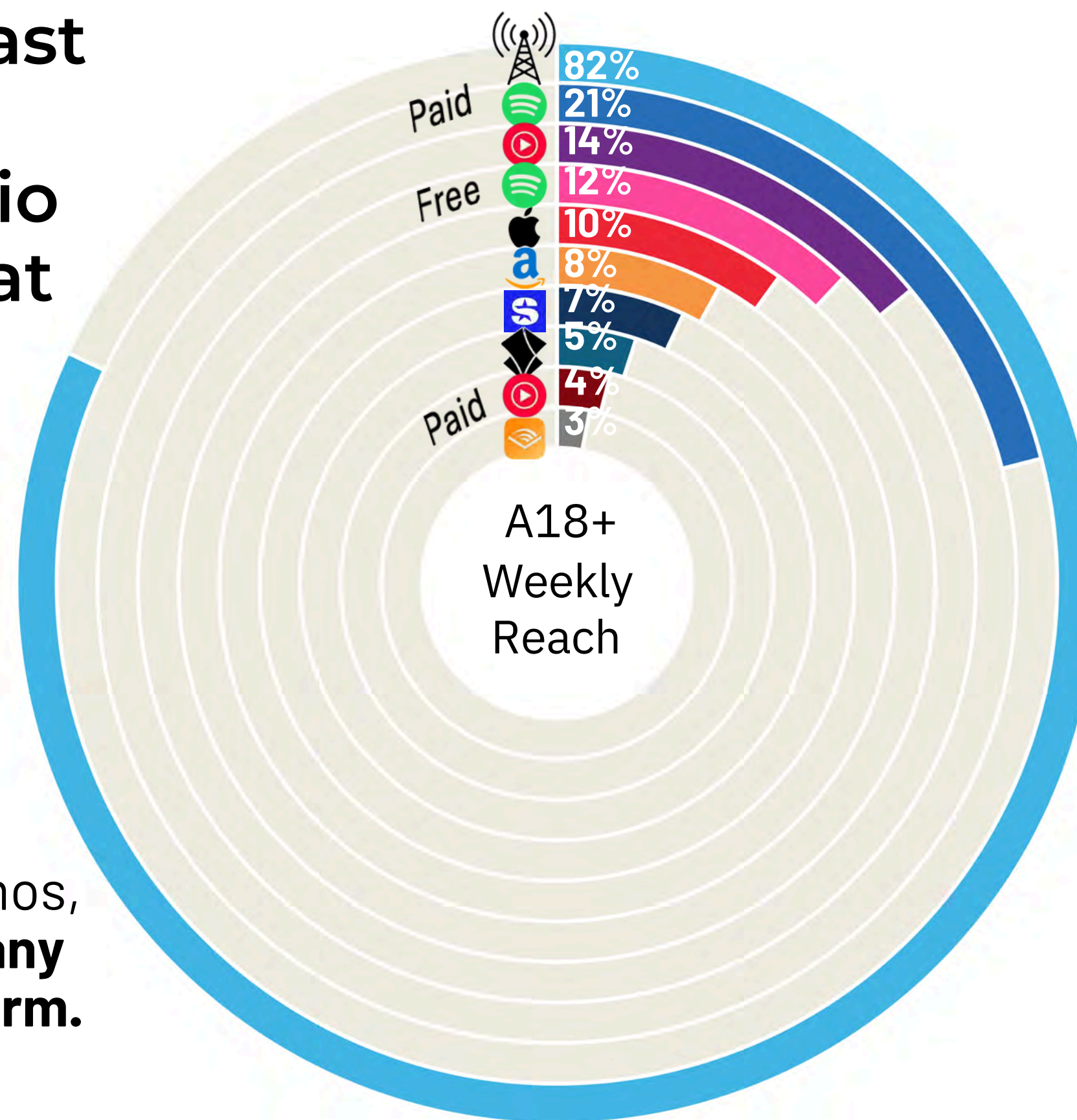
82%
Average Weekly Reach of Live Broadcast Radio 18+*

Live Radio is the **dominant audio platform** to reach Canadians with an audio message

Source: Signal Hill Insights Fall 2024 | *Numeris Fall 2024 PPM TC AW 18+

Live Broadcast Radio Is the Largest Audio Platform That Canadians Listen To

AM/FM Radio reaches more Canadians, across all key demos, in one week **than any other audio platform.**



82% Average Weekly Reach of Live Broadcast Radio

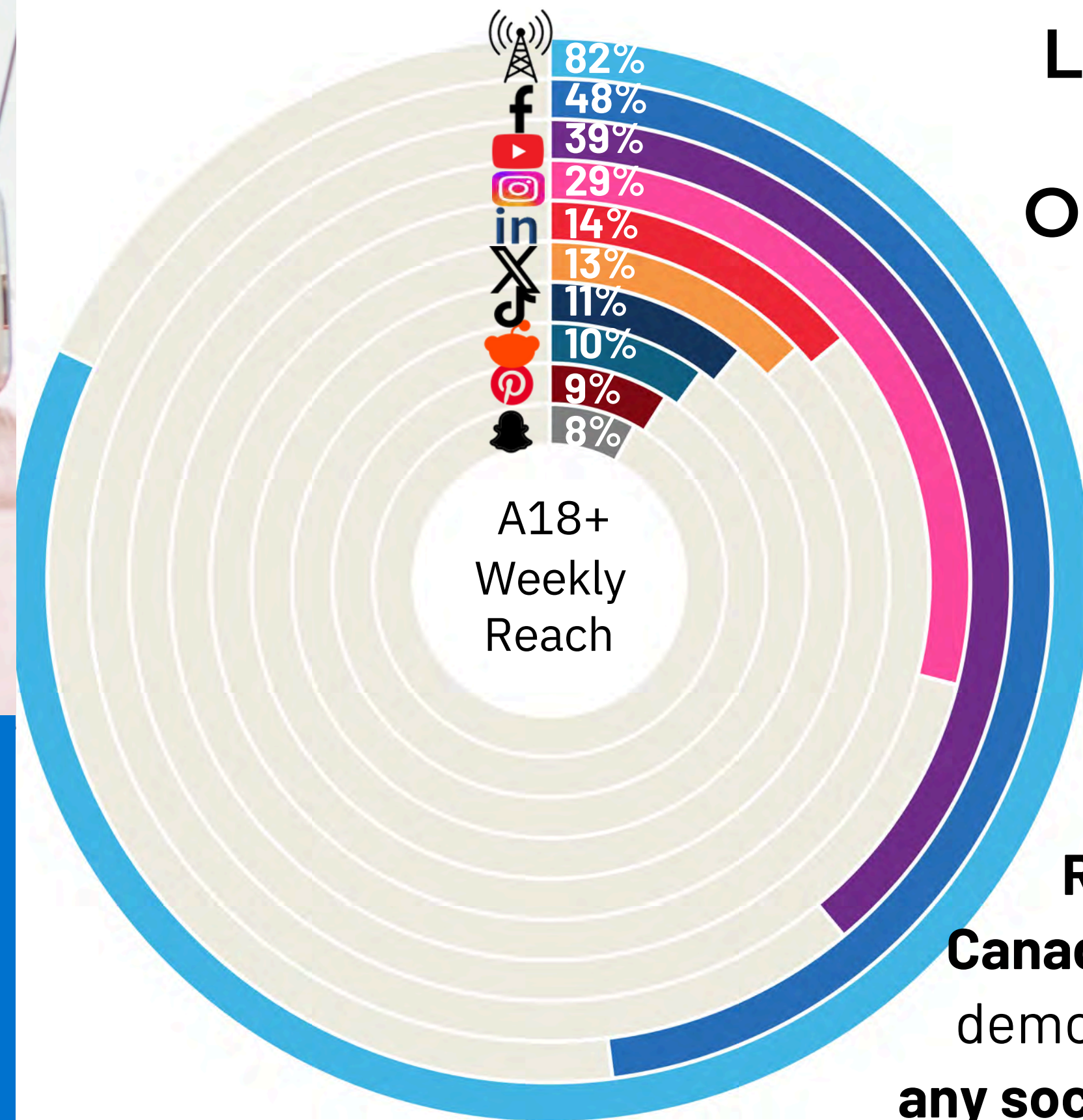
Source: Numeris RTS Fall 2024 Used audio platforms past 7 days:

Source: Numeris Fall 2024 PPM TMC AW 18+



82% Average Weekly Reach of Live Broadcast Radio

Source: Numeris Fall 2024 PPM TMC AW 18+



Live Broadcast Radio Is the Original Mobile Medium and Remains the Largest Social Media Platform

Radio reaches more Canadians, across all key demos, in one week than any social media platform.

Source: Numeris RTS Fall 2024 Used social networks past 7 days:

Key Takeaways

PERCEPTIONS VS. REALITY



Canadians **spend more time with Radio**, and **less time with podcasts and music streaming** than industry professionals perceive.

MARKETERS INVEST IN RADIO



Broadcast Radio generates over a billion dollars in advertising revenue, of **which 67% is spent locally**, because advertisers see the immediate benefits to their business.

NOTHING COMPARES TO RADIO'S SCALE



Live Radio **connects with over 8 million people each day** in Canada, with an average of almost **600,000 listeners every minute**, just in PPM markets alone.

NO OTHER AUDIO PLATFORM TOPS RADIO'S REACH



Among **all audio choices**, from music to audiobooks, **AM/FM Radio reaches the most Canadians.**

RADIO IS THE #1 AD-SUPPORTED AUDIO PLATFORM



Looking at the places where **advertisers can reach Canadians with a commercial message, 7 out of 10 minutes** spent listening to **ad-supported audio** is spent **listening to Live Radio.**

RADIO - THE ORIGINAL SOCIAL MEDIUM



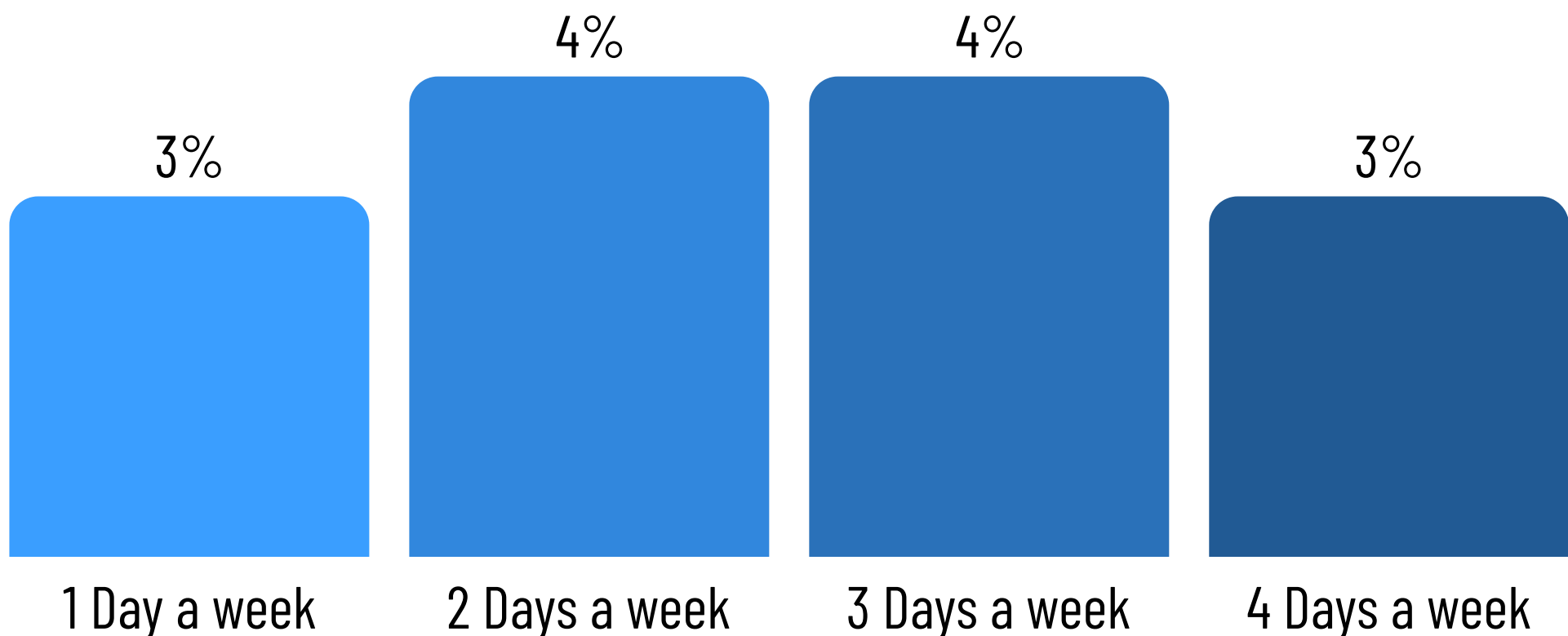
Live Radio reaches more people in one week than **any of the audio or social media** apps, reaching almost **7x more Canadians than Free Spotify** and most **2x as many as Facebook.**

On the Go and
IN THE CAR
AUDIO LANDSCAPE

2025



No. of days per week Canadians are working away from home



Where Canadians are working

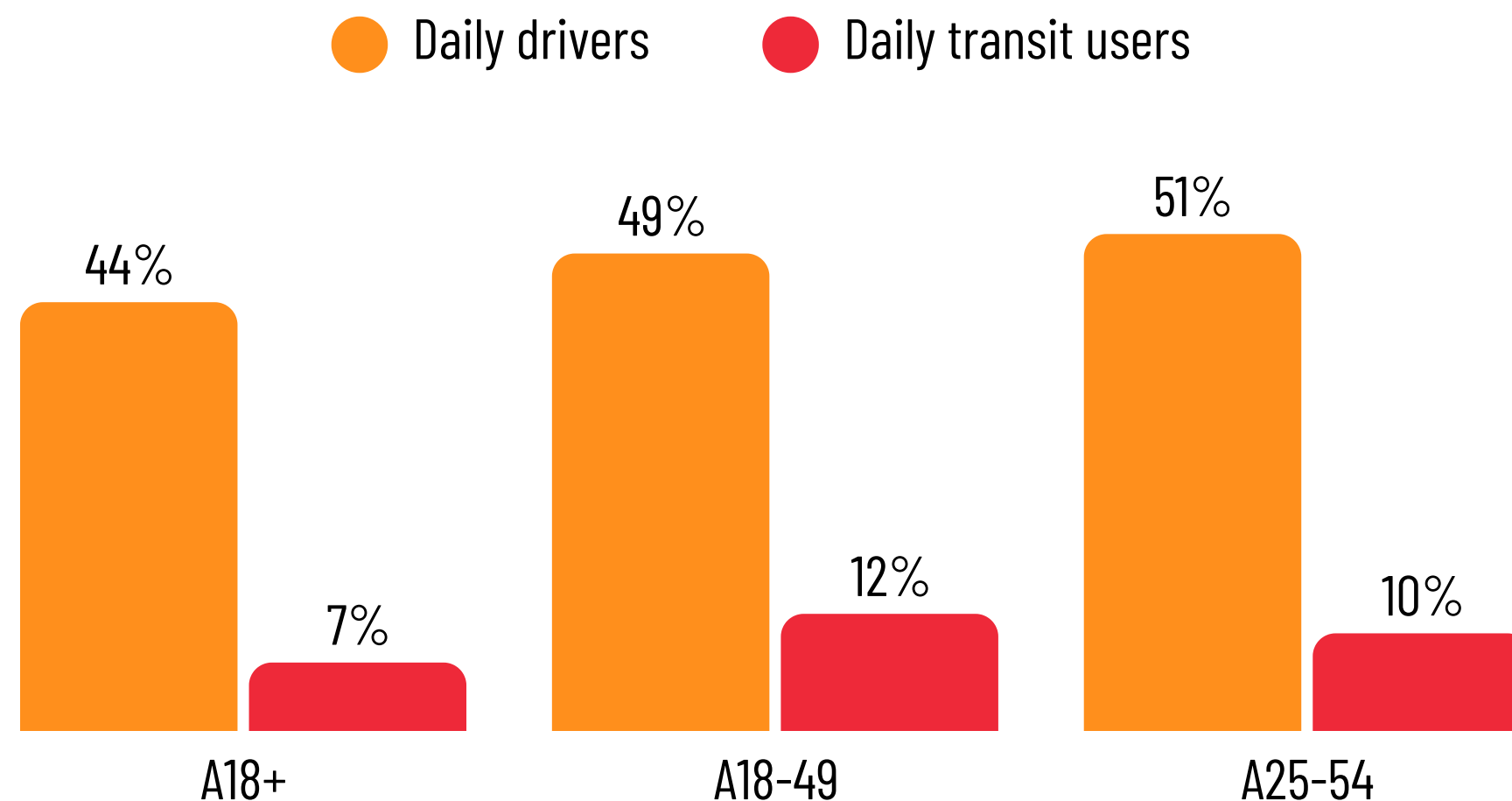


Although many white-collar professionals, like those in media and advertising, may continue to work at home, **Canadian workers on average are working 3.8 days away from their homes.**



Source: Signal Hill Insights Fall 2024

More Canadians Drive Than Take Transit



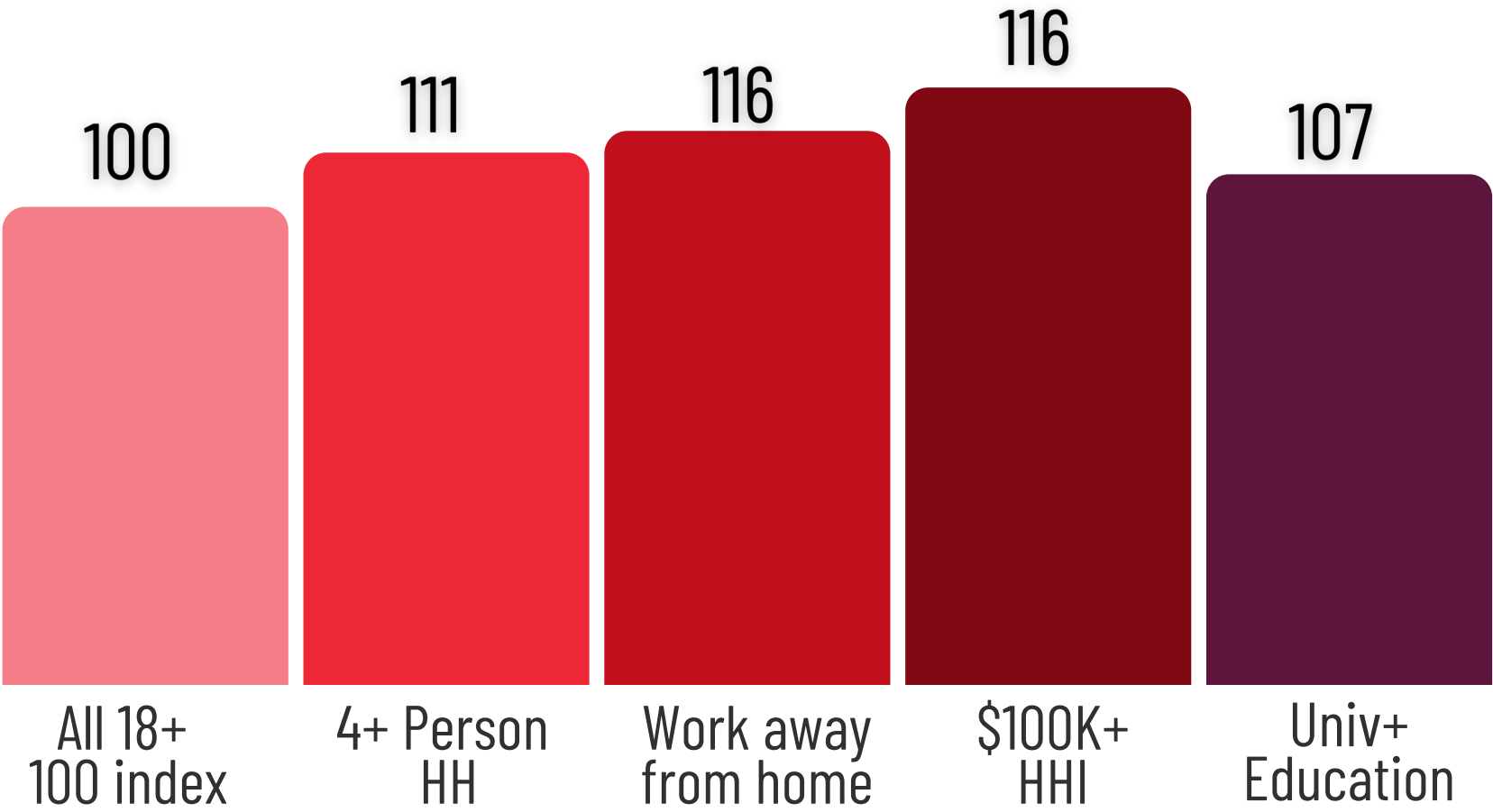
A18-49 are almost **4x more likely**, and A25-54 are **5x more likely** to be **in a car** vs. taking public transit.



Source: Signal Hill Insights Fall 2024

Affluent, Educated Audiences are More Likely to Have Spent Time In-Car Yesterday Listening to Live Broadcast Radio

Listened to AM/FM Radio in the car yesterday - **Indexed to 18+**



Source: Signal Hill Insights Fall 2024

Listeners of in-car Radio typically live in larger households, possess higher education levels, earn greater incomes, and are more likely to work away from home. This makes them an ideal advertising target to engage while on the move.



11%

Live in
**Bigger
Households**

16%

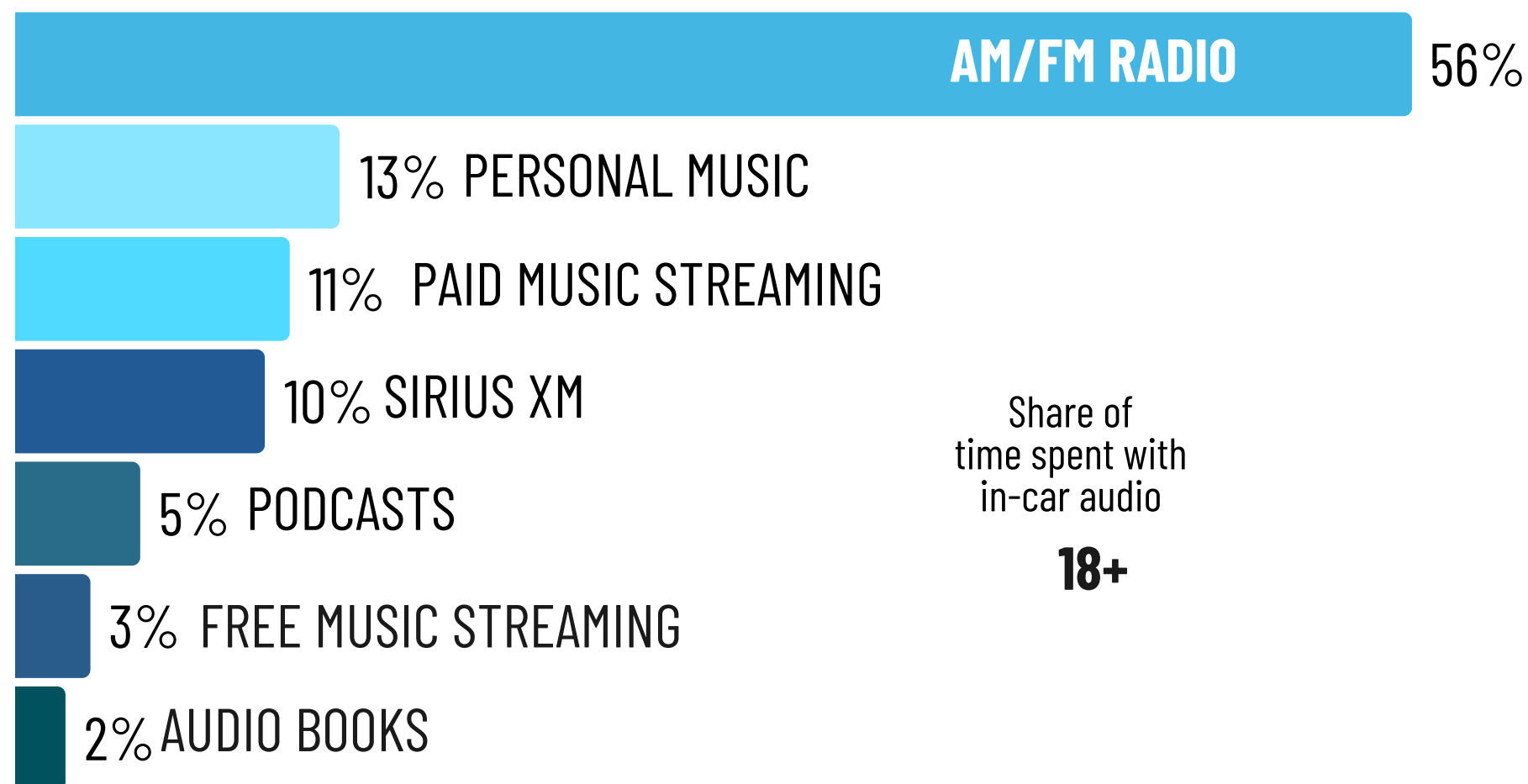
Are
**Back in
'the Office'**

16%

Earn
**Over
100K**

Broadcast Radio is in the Driver's Seat for In-Car Audio

Live Broadcast Radio is the **audio platform of choice** when Canadians are **on the go** - commuting, shopping, and running errands.



Source: Signal Hill Insights Fall 2024



Radio's share of time spent with audio in the car is:

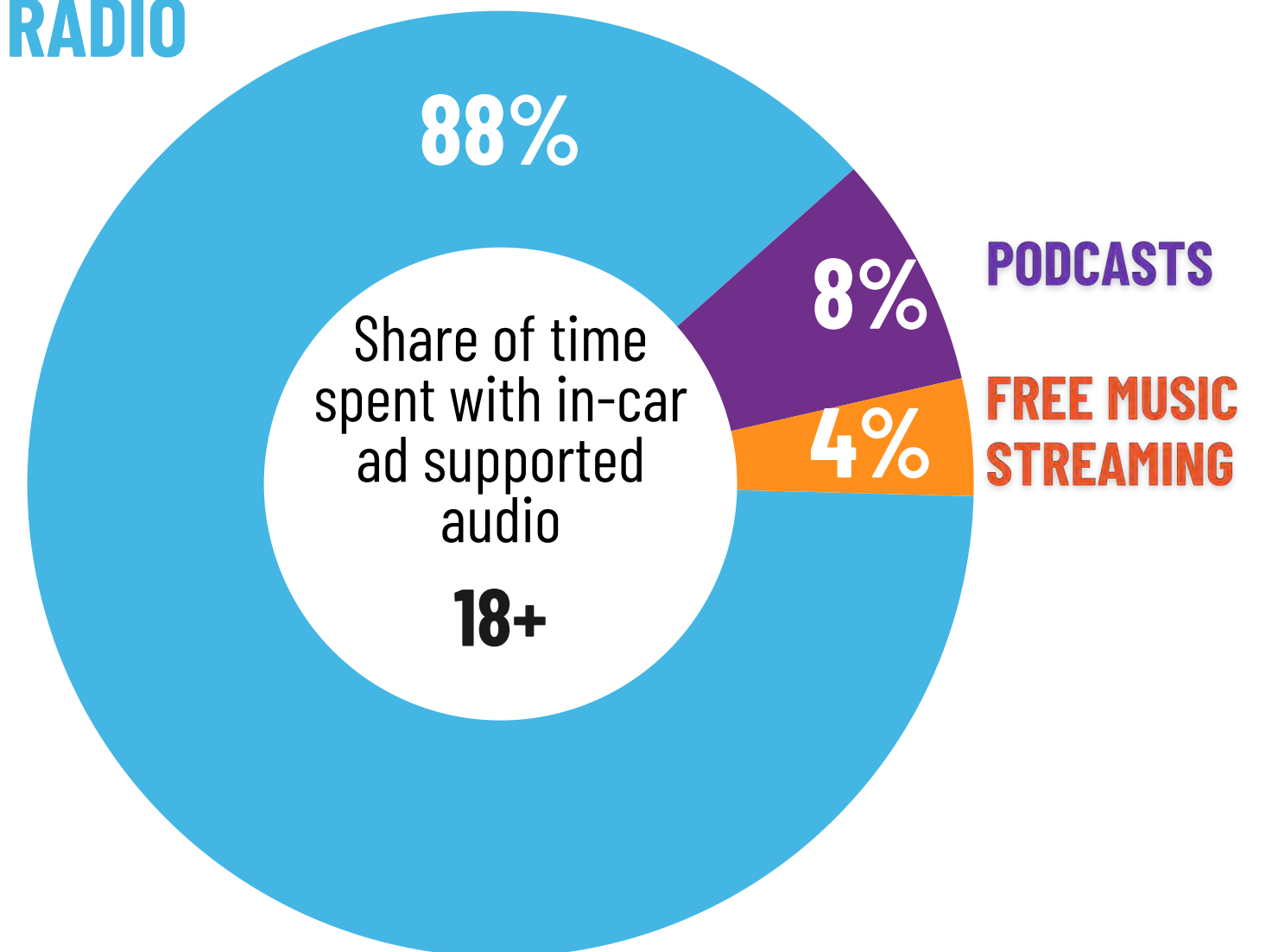
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CANADIANS TURN TO LIVE RADIO WHEN THEY'RE IN THE CAR

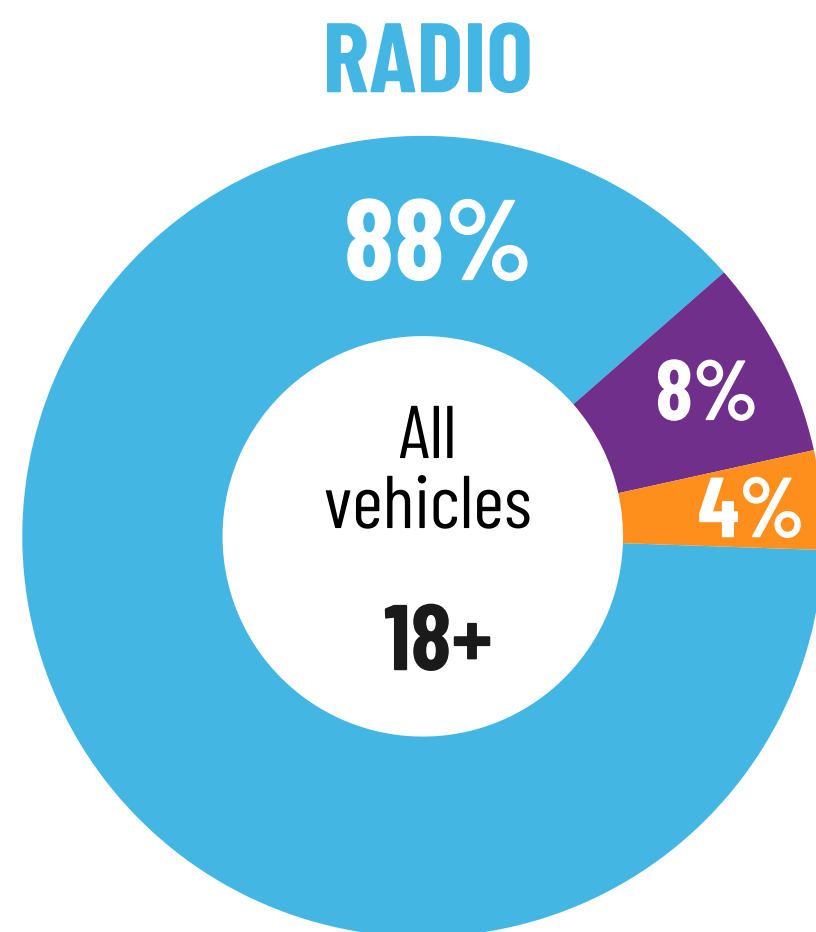
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RADIO



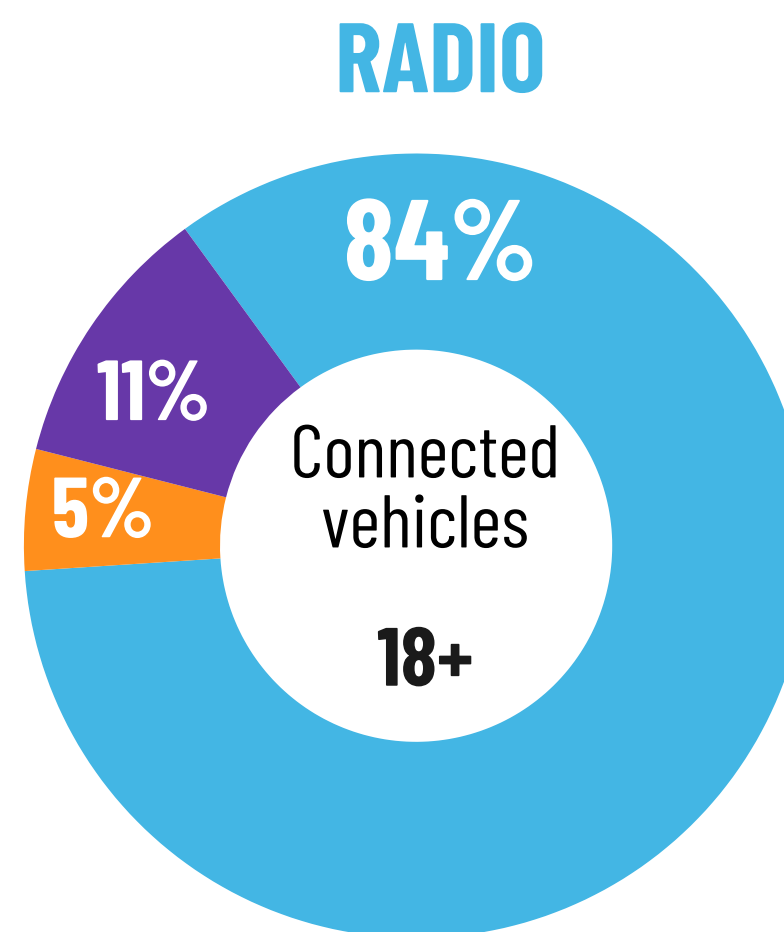
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In Vehicles Equipped with the **Latest Technologies**, Broadcast **Radio** Accounts for the **Majority of the Time** Dedicated to Ad-Supported Audio Content



Share of time
spent with in-car
ad supported
audio

PODCASTS
FREE MUSIC
STREAMING



AM/FM THE #1 AD-SUPPORTED MEDIA IN CONNECTED CARS



Source: Signal Hill Insights Fall 2024 | Connected vehicles equipped with Apple Car Play, Android Auto, WiFi, Bluetooth

Key Takeaways

ON THE ROAD AGAIN



Only 17% of employed workers are fully remote, while nearly 70% work exclusively away from home, and 14% follow a hybrid model.

MORE IN CARS VS. TAKING TRANSIT



More people claim to be in a vehicle yesterday versus taking public transit. These more affluent and higher educated people are also daily Radio listeners.

MORE AFFLUENT CONSUMERS ARE IN VEHICLES



People in cars tend to be more affluent, and have higher education and live in 4+ households. They are also daily listeners to Live Radio.

RADIO IS IN THE DRIVER'S SEAT



Among all the audio choices available in-car, from personal music to audio books, Live Radio claims more than half of the time spent listening to audio in the car.

LIVE RADIO CONNECTS WITH CONSUMERS IN-



Live Radio offers advertisers the greatest opportunity to connect with their customers in-car. 53 minutes of every hour spent with ad-supported audio is spent listening to Live Radio.

RADIO STAYS CONNECTED



Even in the latest model of cars with updated technology, Live Radio remains the audio of choice, garnering 84% of time spent with ad-supported audio.



AM/FM Drives

CONSUMER ACTIONS

2025

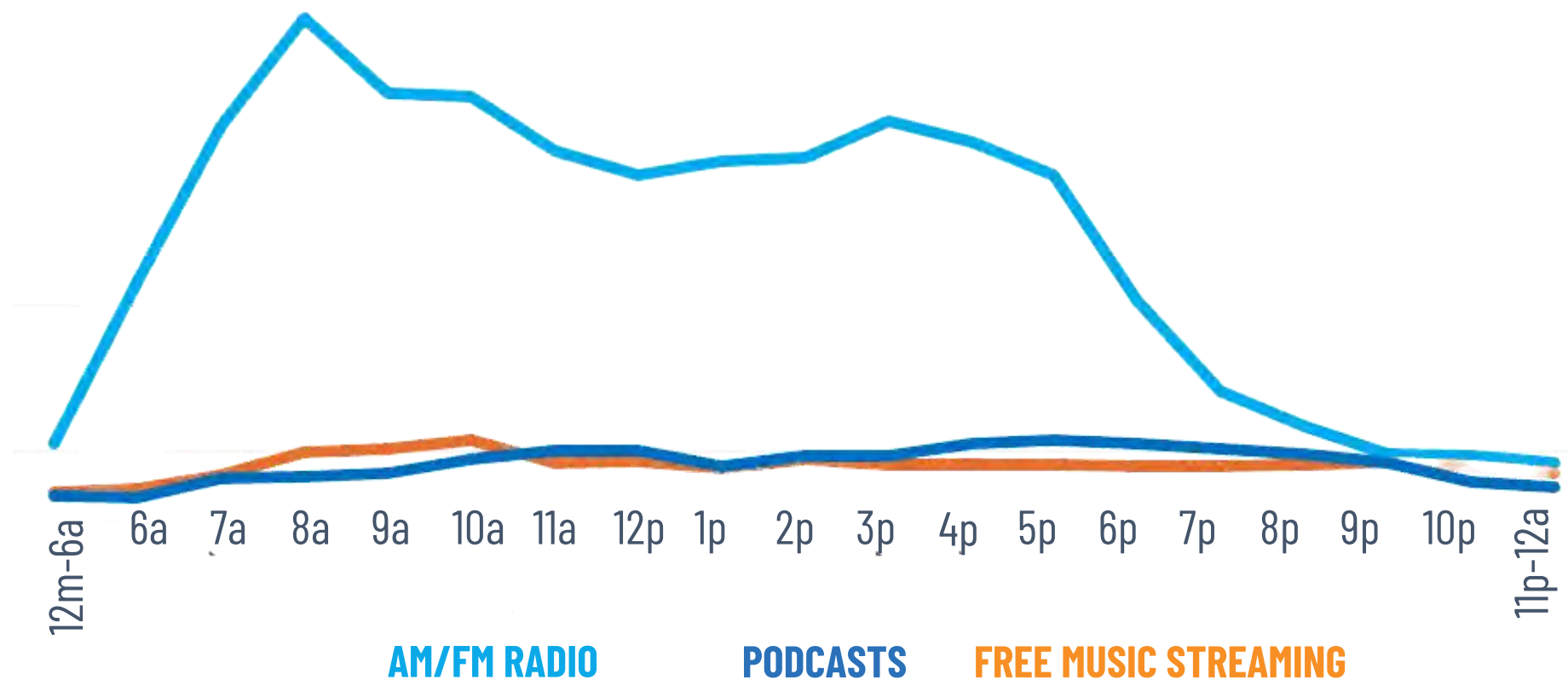


94%^{1.}

of Consumers Spending is happening
at brick and mortar stores

When Stores Are Open and Screens Are Off, Live Radio Has the Largest Buyable Audiences Throughout the Day

Usage 18+ Monday to Sunday



Source: 1 Signal Hill Insights Fall 2024 | 2. Statistics Canada. Table 20-10-0056-01. Monthly retail trade sales by province and territory (x1000). September 2024

AM/FM Radio Reaches Online Shoppers

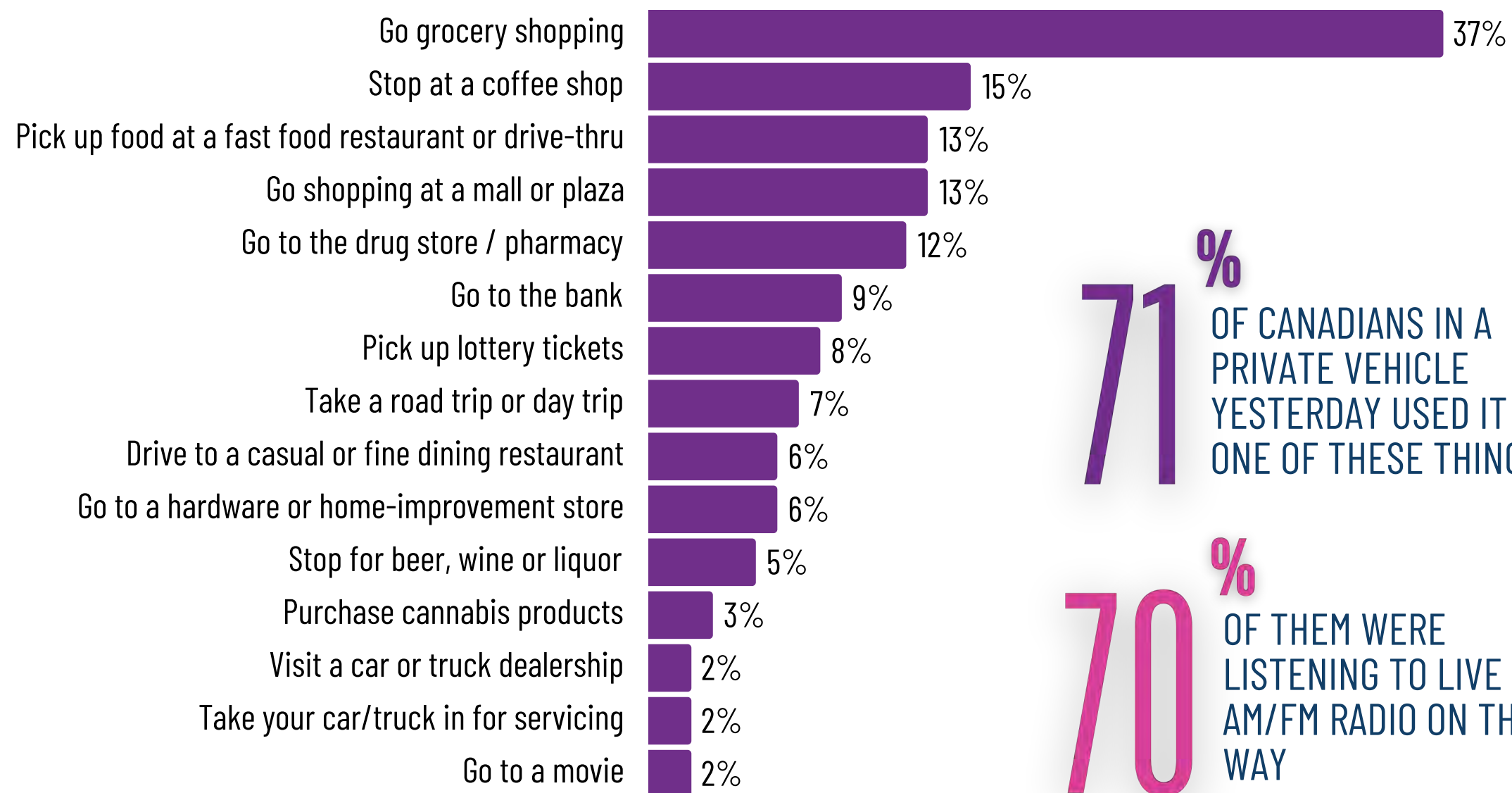
While most shopping is still **done at brick & mortar** stores, **Radio reaches** individuals **shopping online**.

68% of Canadians 18+ who have shopped online in the past week also listened to AM/FM Radio

Source: Signal Hill Insights Fall 2024

7 Out of 10 Canadians Aged 18+ Were in Their Vehicles Yesterday, Spending Money, and the Majority of Them Were Tuned Into AM/FM Radio During Their Journey

Share of time spent with in-car audio 18+



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

Source: Signal Hill Insights Fall 2024

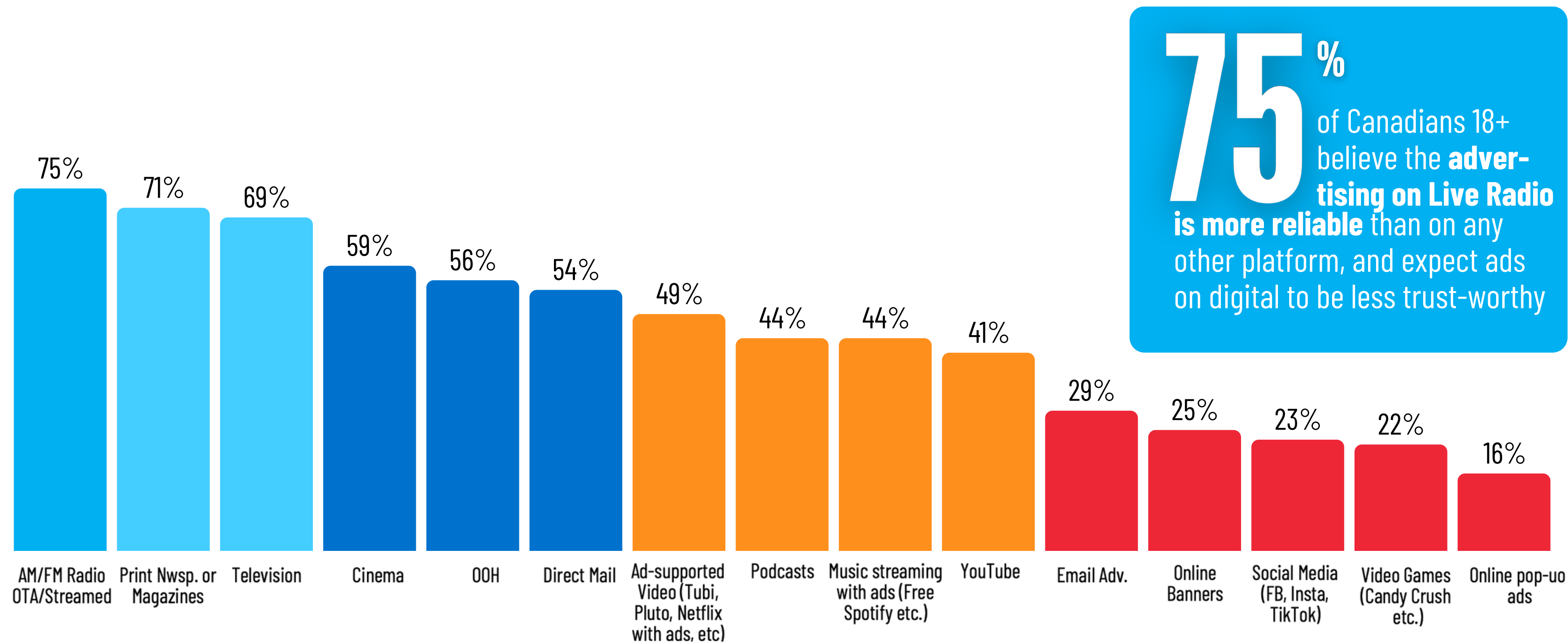
85%

OF GROCERY SHOPPERS LISTEN TO LIVE RADIO

Source: Numeris RTS Fall 2024

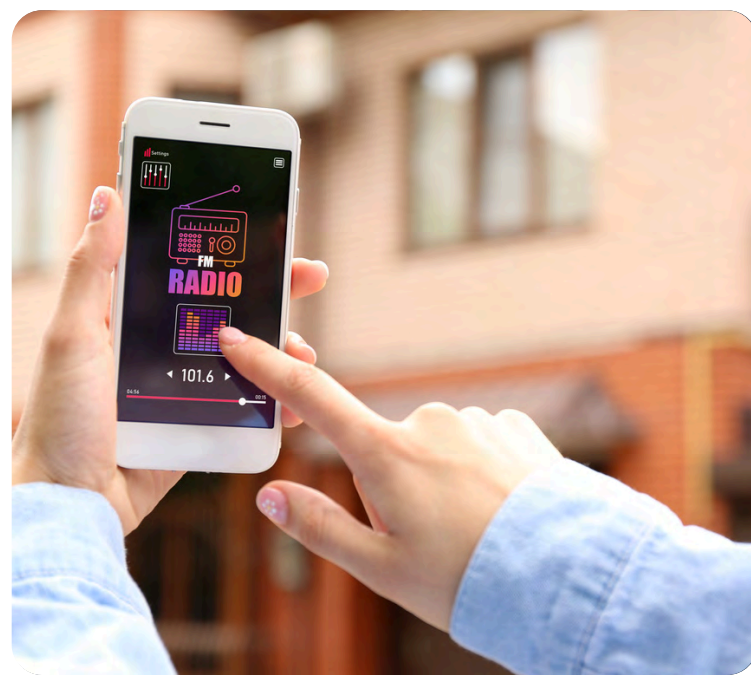


Radio Is the Place Where Canadians Expect to Hear Advertising They Can Trust



Source: Numeris RTS Fall 2024 Used social networks past 7 days:

Ads Heard on the Radio Inspire Listeners to Take Action



After hearing an ad on the Radio

45%

18+ were inspired to:

Take any of these actions



After hearing an ad on the Radio

29%

18+ were inspired to:

Go online to learn more about it



After hearing an ad on the Radio

23%

18+ were inspired to:

Tell someone else about it



After hearing an ad on the Radio

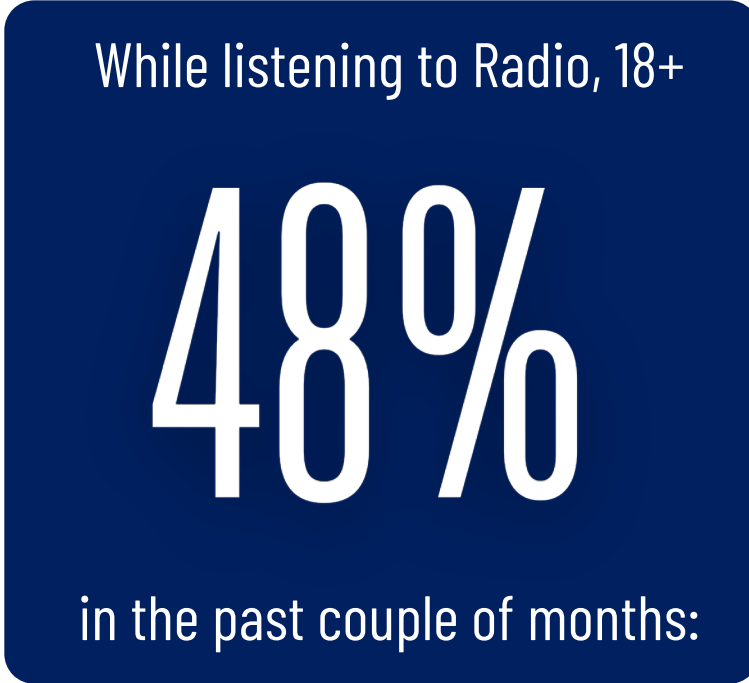
10%

18+ were inspired to:

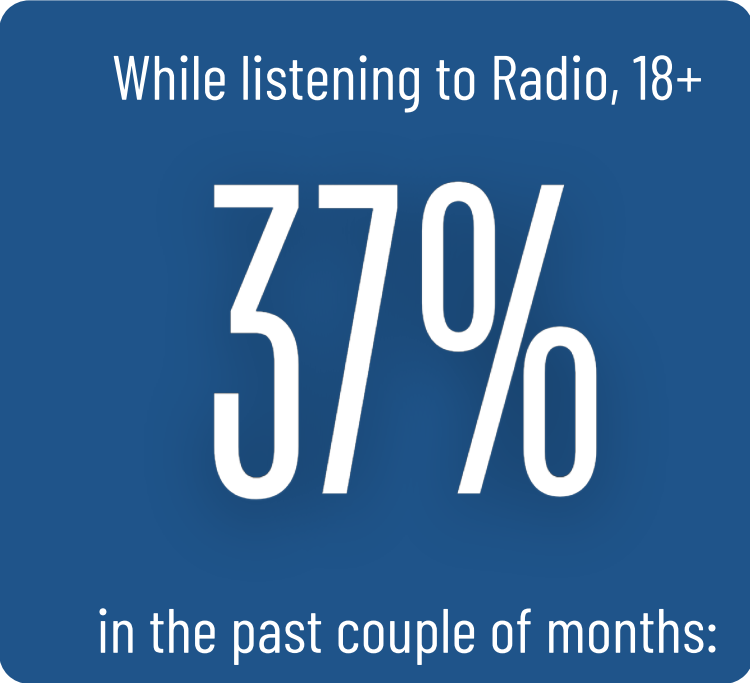
Purchase it

Source: Signal Hill Insights Fall 2024

Listeners Discover Local Events, Products, and Services by Listening to Live Radio



Experienced any of these actions



Learned about an event happening in my area



Learned about an already familiar product/service



Learned about a new unfamiliar product/service

Source: Signal Hill Insights Fall 2024

18-34s Are Even More Likely to Have Been Influenced by What They've Heard on Live Radio

While listening to Radio, 18-34

55%

in the past couple of months:
Experienced any of
these actions

115 index
18+

While listening to Radio, 18-34

28%

in the past couple of months:
Learned about an already
familiar product/
service

133 index
18+

While listening to Radio, 18-34

24%

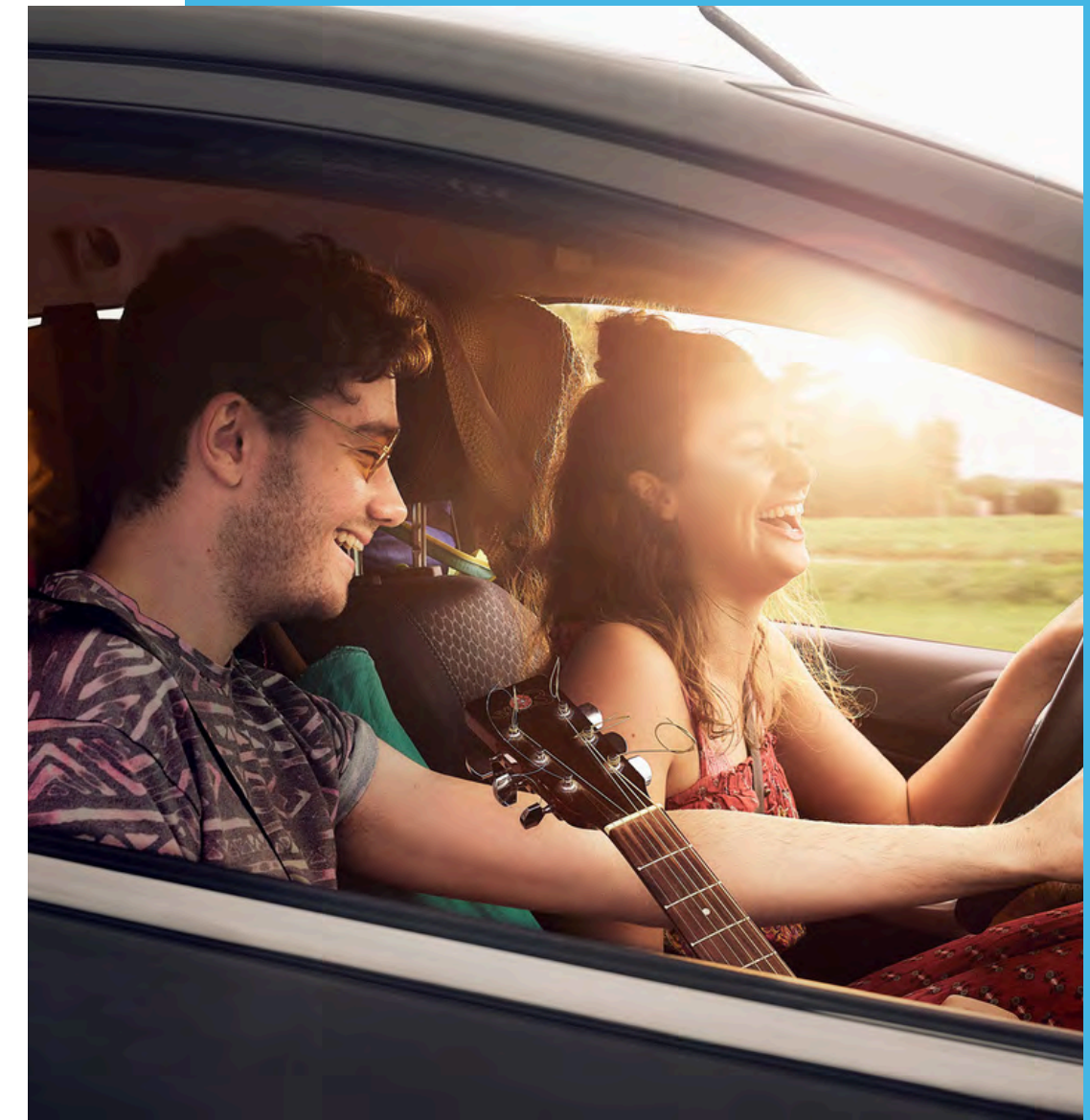
in the past couple of months:
Learned about a
new unfamiliar
product/service

133 index
18+

18 to 34 year olds are

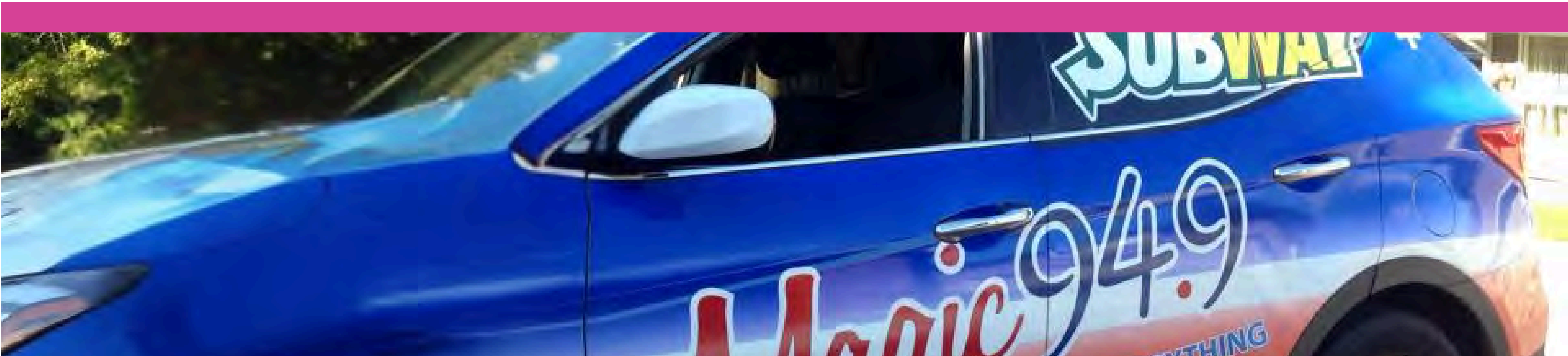
33%

more likely to hear about a new,
unfamiliar product advertised on the
Radio compared to the average Canadian
aged 18 and older.



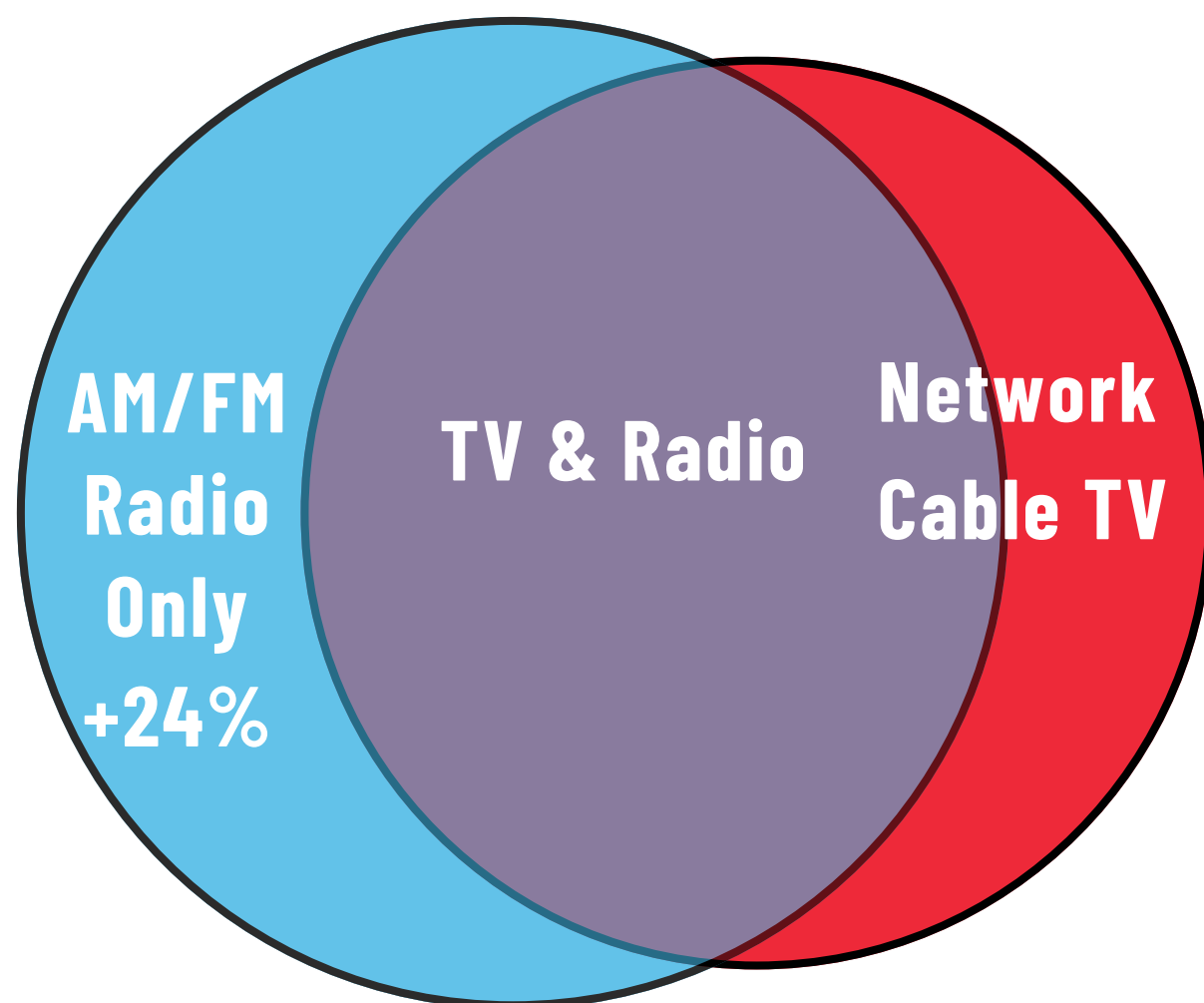
Source: Signal Hill Insights Fall 2024

Over Half of Canadians value the Support That Brands Provide to Local Media Through Advertising



Source: Signal Hill Insights Fall 2024

Although there is **overlap** in the weekly **reach** of both **TV** and Radio, **each medium connects** with audiences **the other does not**.



24%

Adding Live Radio to a TV campaign adds an additional 24% reach against the 18+ population

LIVE RADIO IS A REACH EXTENDER FOR TV CAMPAIGNS

Source: Signal Hill Insights Fall 2024

Key Takeaways

SHOPPING IN PERSON



Stats Canada reports that shopping in **brick-and-mortar stores** makes up the **majority of retail spending** occurs. So when **stores are open, Live Radio is on.**

RADIO CONNECTS WITH SHOPPERS BEFORE THEY SPEND



71% of Canadians reported they were in their **cars yesterday** running errands and **spending money**, and **70% were listening to Radio** as they were on their way.

CANADIANS EXPECT TO HEAR ADS THEY TRUST ON THE RADIO



Tried, tested and trusted, Canadians have **faith** in the ads they **hear on AM/FM** over any other medium, demonstrating the **close connection** listeners have with their favourite stations.

WITH TRUST COMES ACTION



When Canadians **trust what they're hearing they take action**. Almost half of **Canadians** say they **respond** to ads on the **Radio**, which is **attribution Radio does not get credit for.**

SUPPORTING LOCAL MEDIA MEANS SOMETHING



Canadians in all community sizes **appreciate** the **brands** who **invest in their communities** by **advertising on local media.**

LIVE RADIO COMPLIMENTS TV CAMPAIGNS



Extending Reach and Frequency to **maximize advertising impact** across key demographics.



Live Radio in the

AGE OF DIGITAL AUDIO

2025

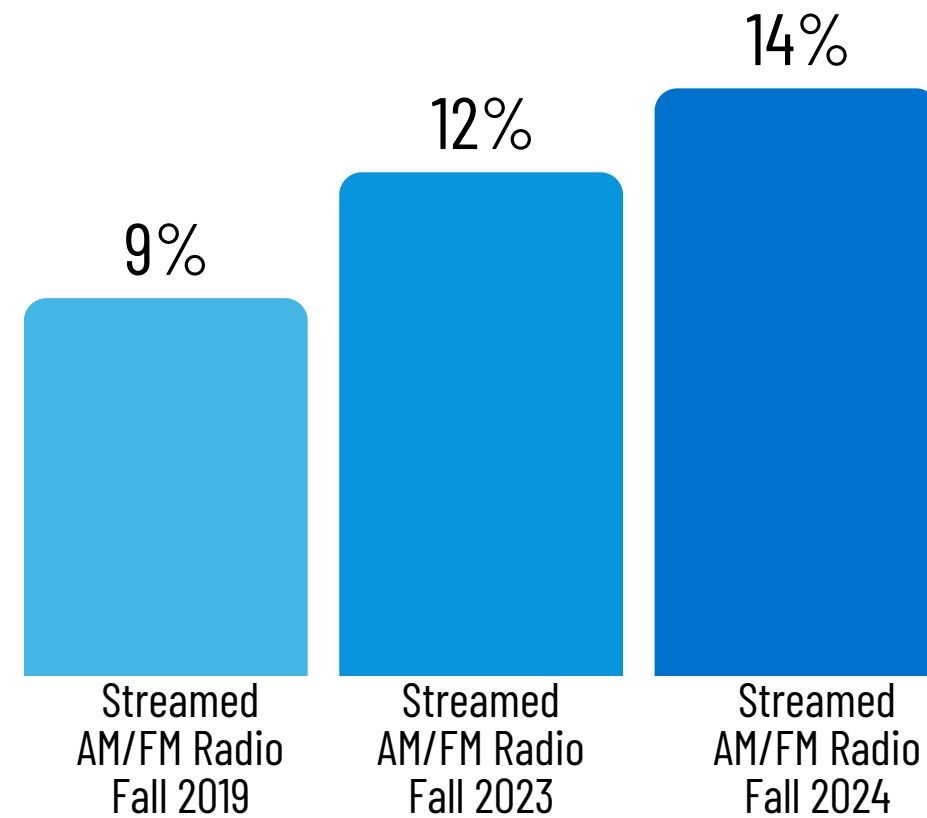


Share of listening to Streamed Live Radio is up by more than 50% since Fall of 2019

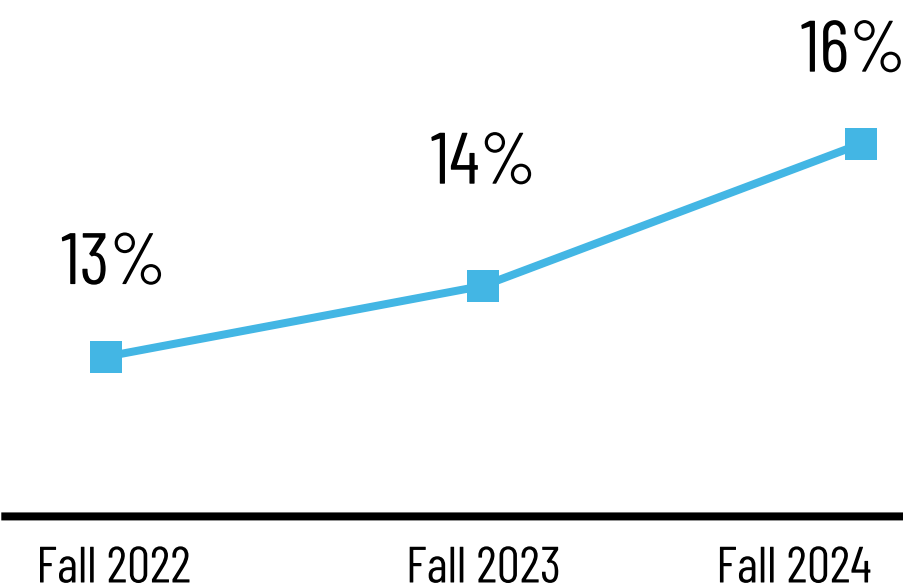
676,300
More Canadians 18+ streamed Live Radio this past week versus 2023

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 free music services** are typically **daily listeners of Live Radio**, and **over index against the 18+** population because they are **avid listeners to audio in general**.

Source: Signal Hill Insights Fall 2024

83%

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

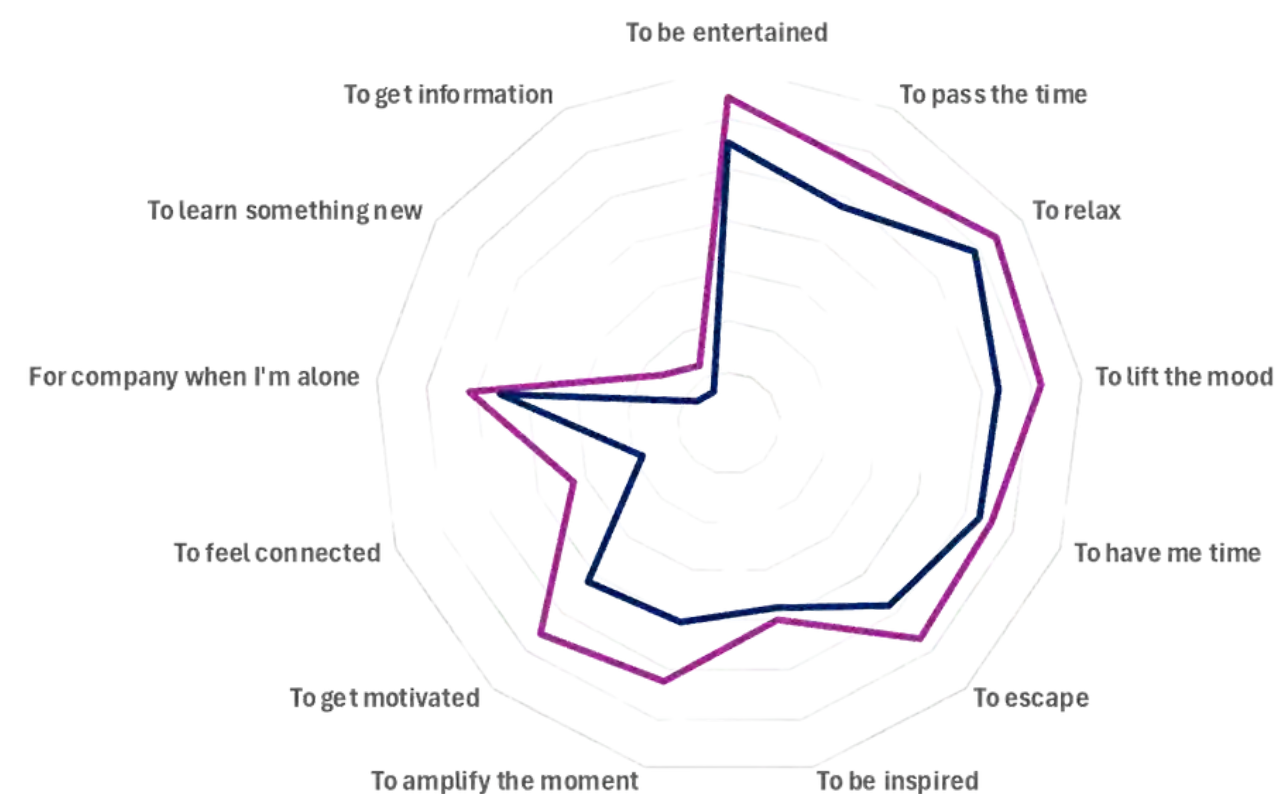
103 Index

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



Source: Signal Hill Insights Fall 2024



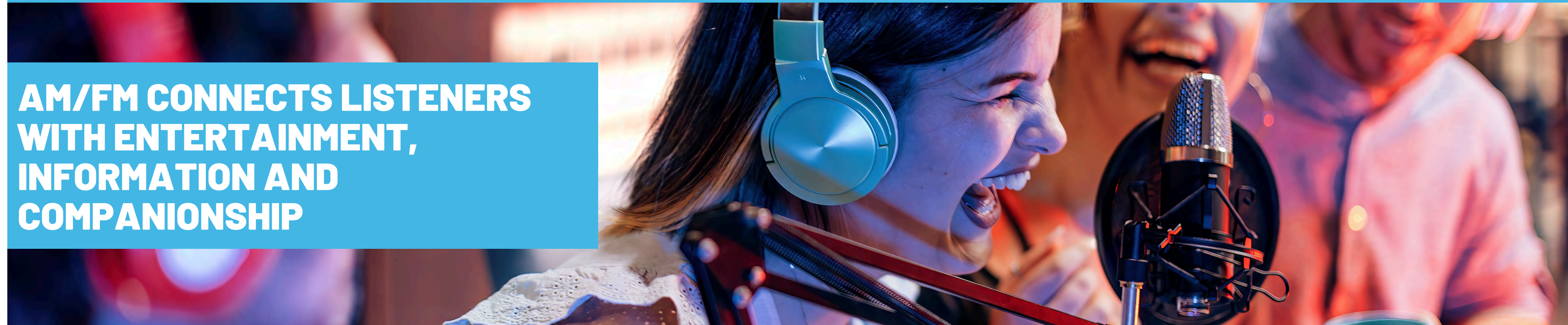
**LISTENERS TO FREE
MUSIC STREAMING ARE
LESS ATTENTIVE**

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**.

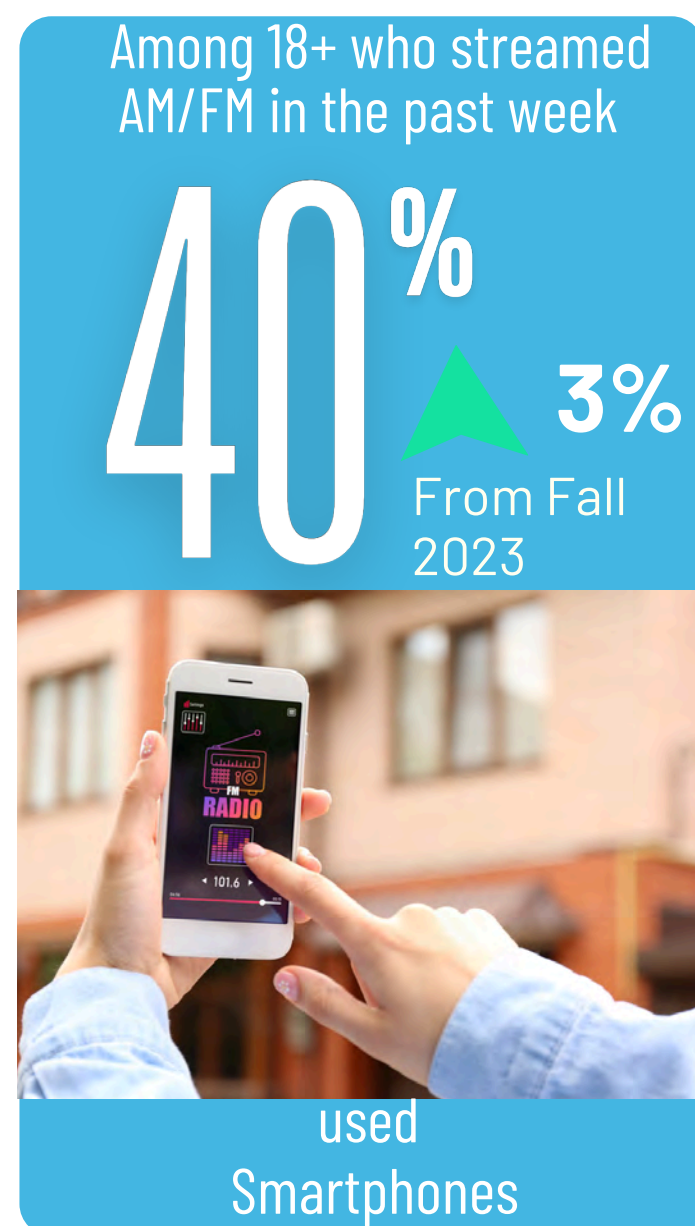
**AM/FM CONNECTS LISTENERS
WITH ENTERTAINMENT,
INFORMATION AND
COMPANIONSHIP**



Source: Signal Hill Insights Fall 2024

Smartphones are Increasingly Becoming the Primary Device for Streaming Live Radio

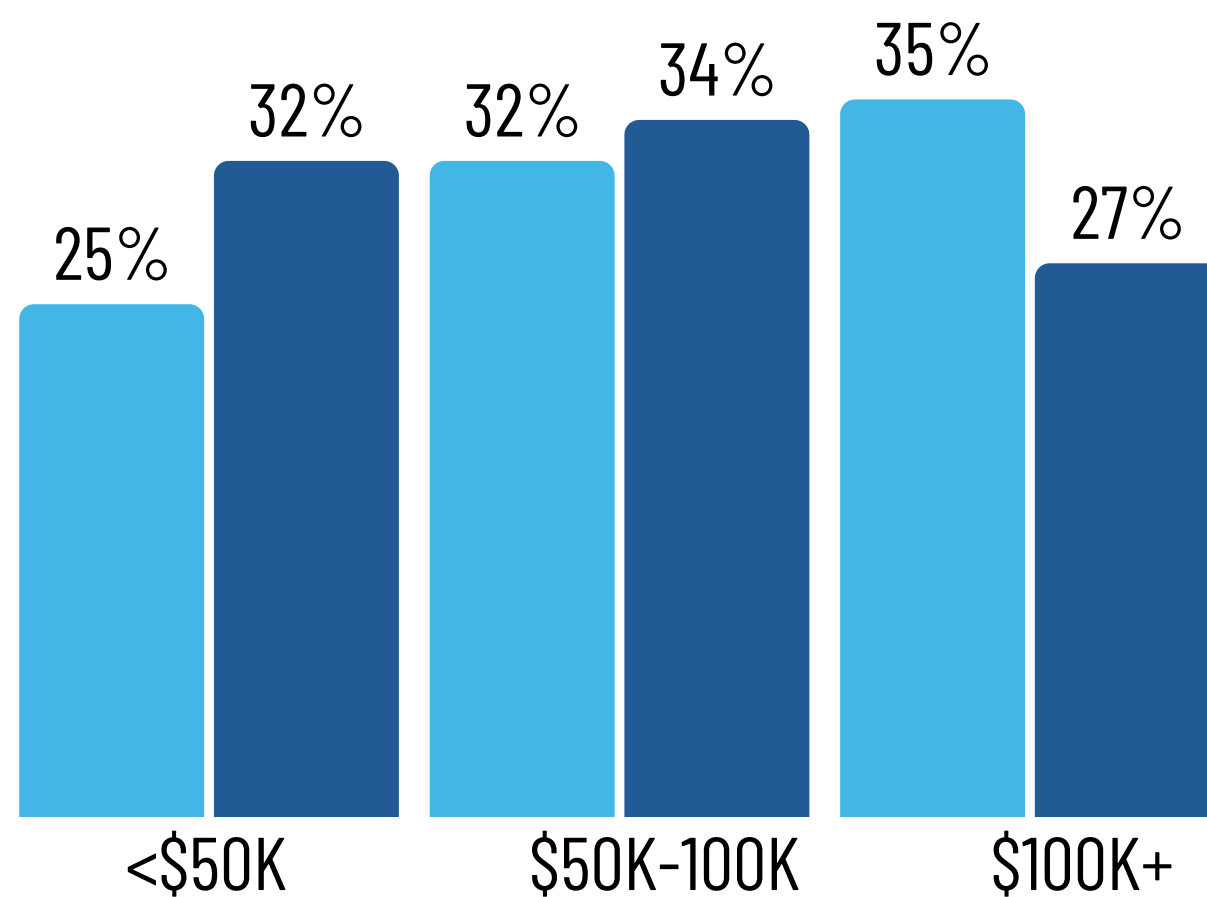
Tablets have also seen an increase in usage among people streaming AM/FM Radio.



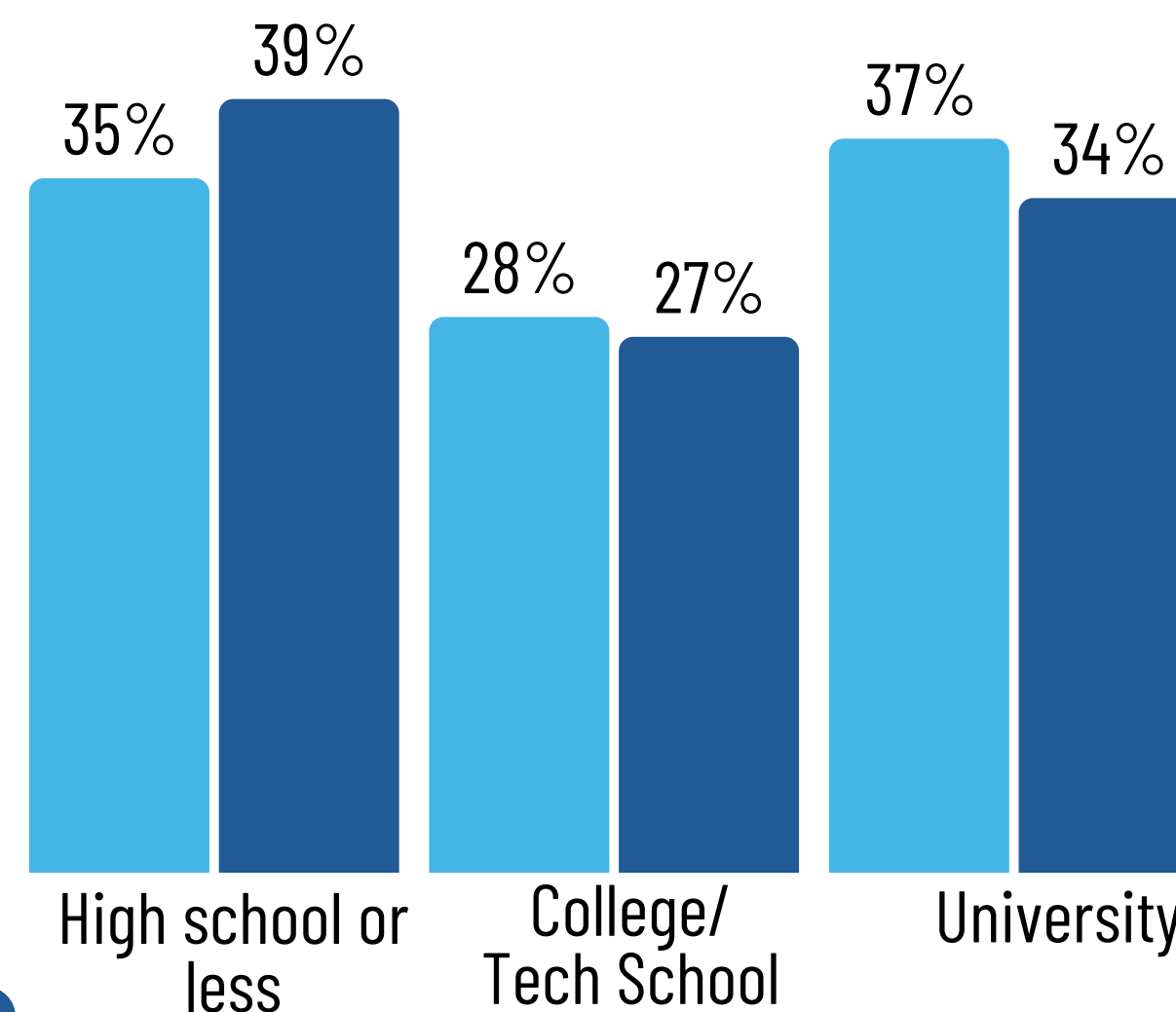
Source: Signal Hill Insights Fall 2024

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.

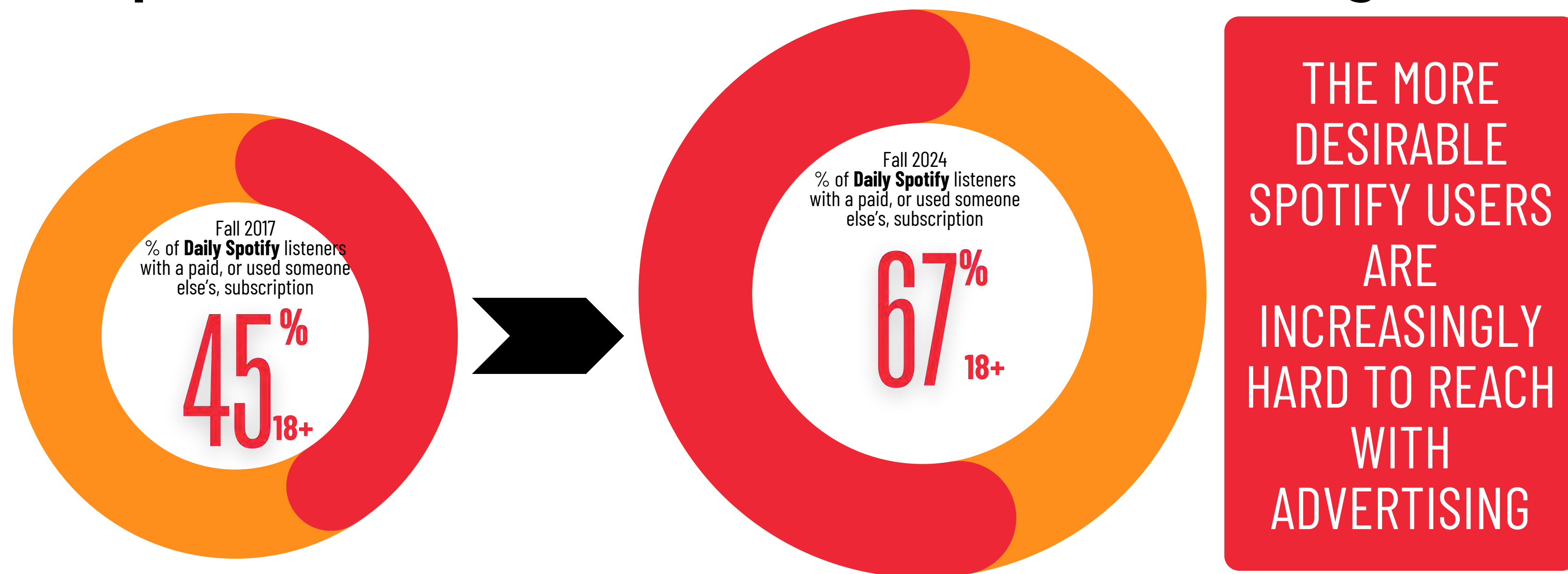


**STREAMED
RADIO**

**FREE MUSIC
STREAMING**

Source: Signal Hill Insights Fall 2024

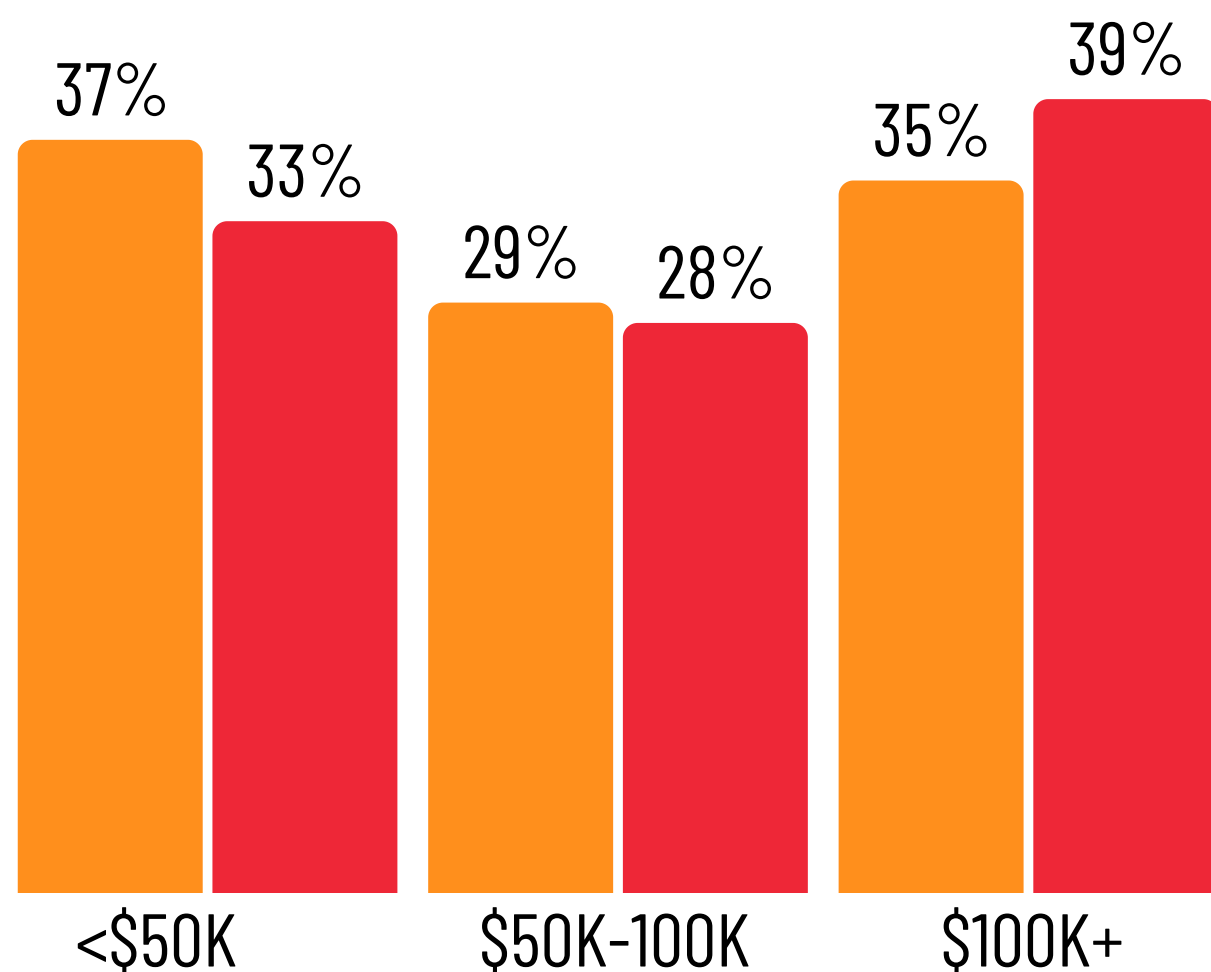
Since its launch, Spotify has experienced **a consistent rise** in users **upgrading to its paid service**. This trend mirrors the **growing preference** among some Canadians for **‘renting’ their personal music collections** rather than owning them.



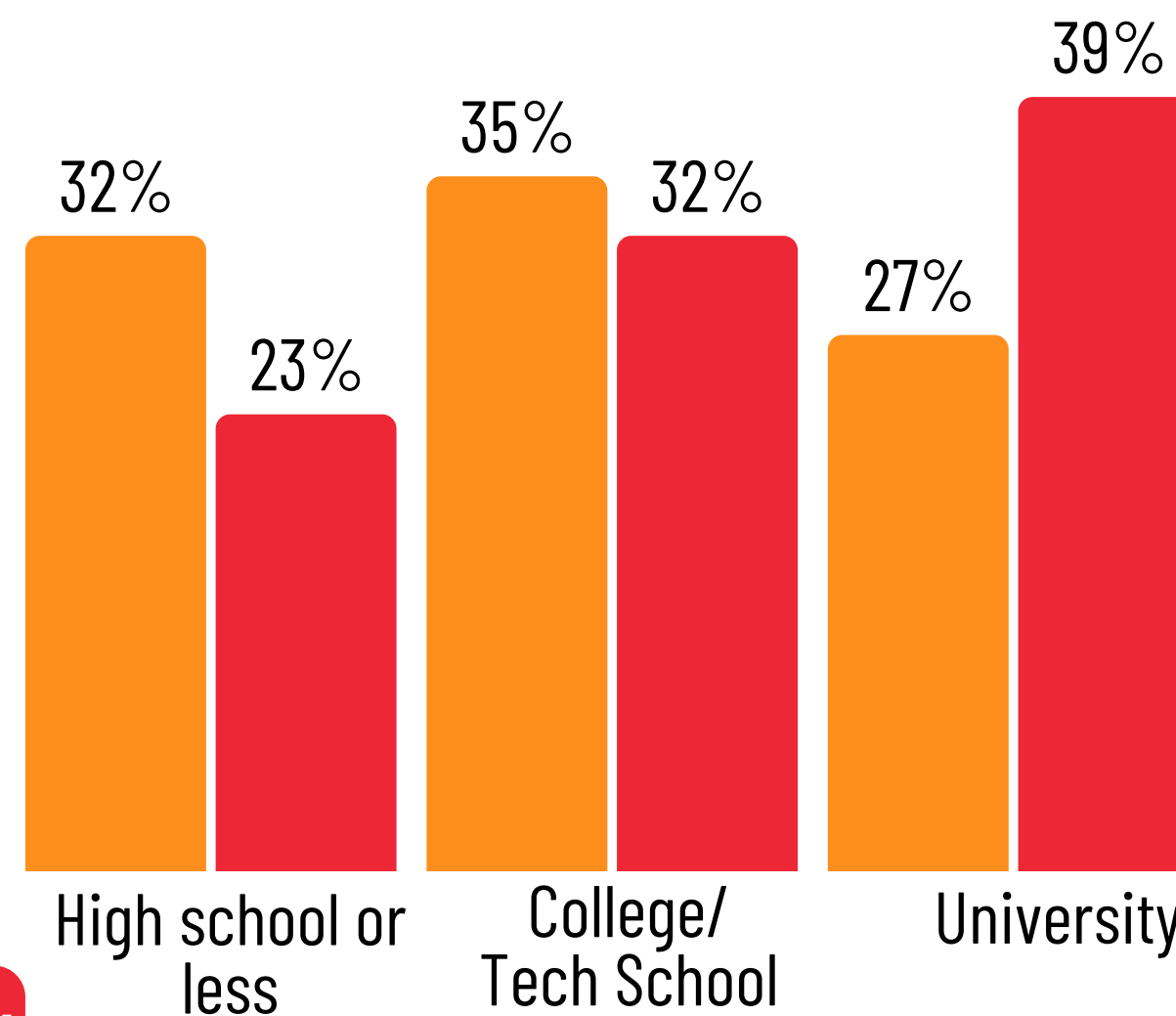
Source: Signal Hill Insights Fall 2024

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

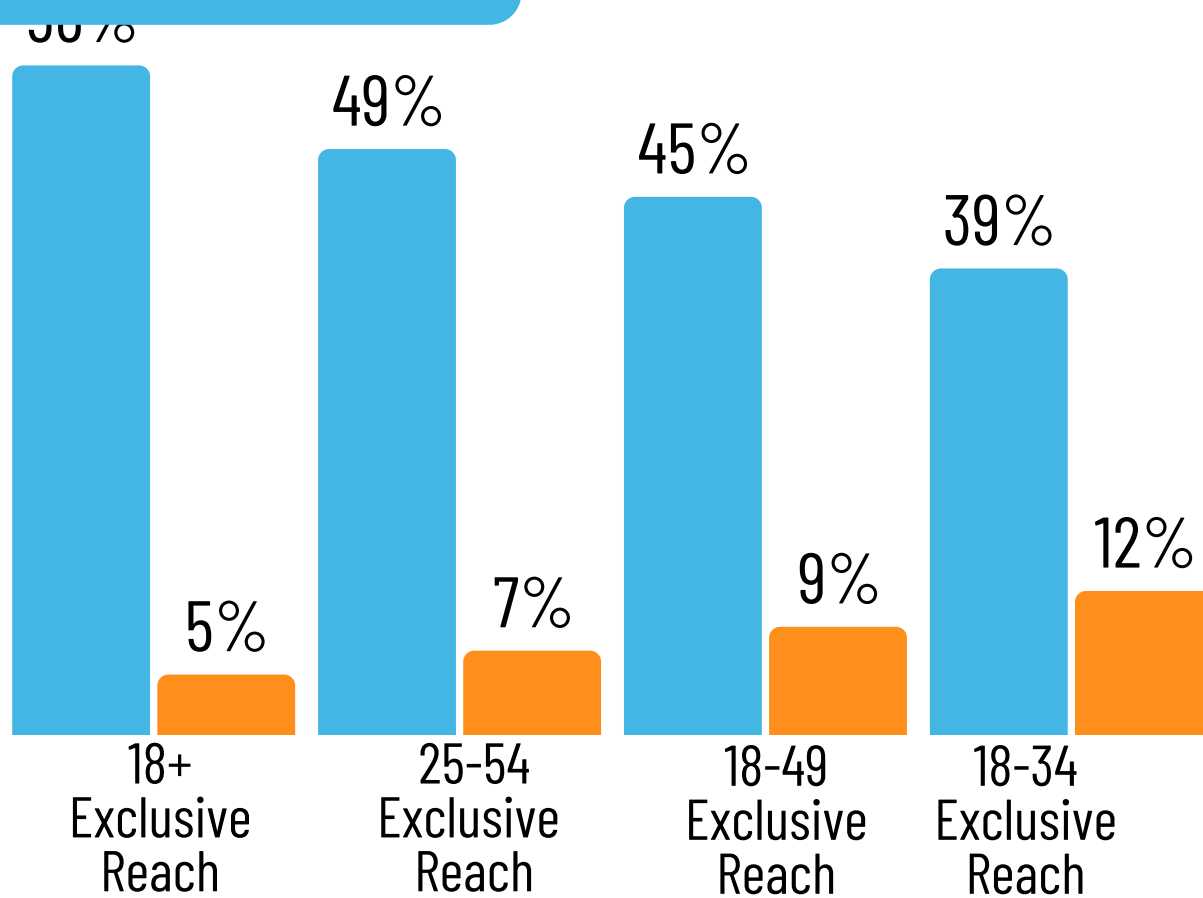
FREE SPOTIFY

PAID SPOTIFY

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

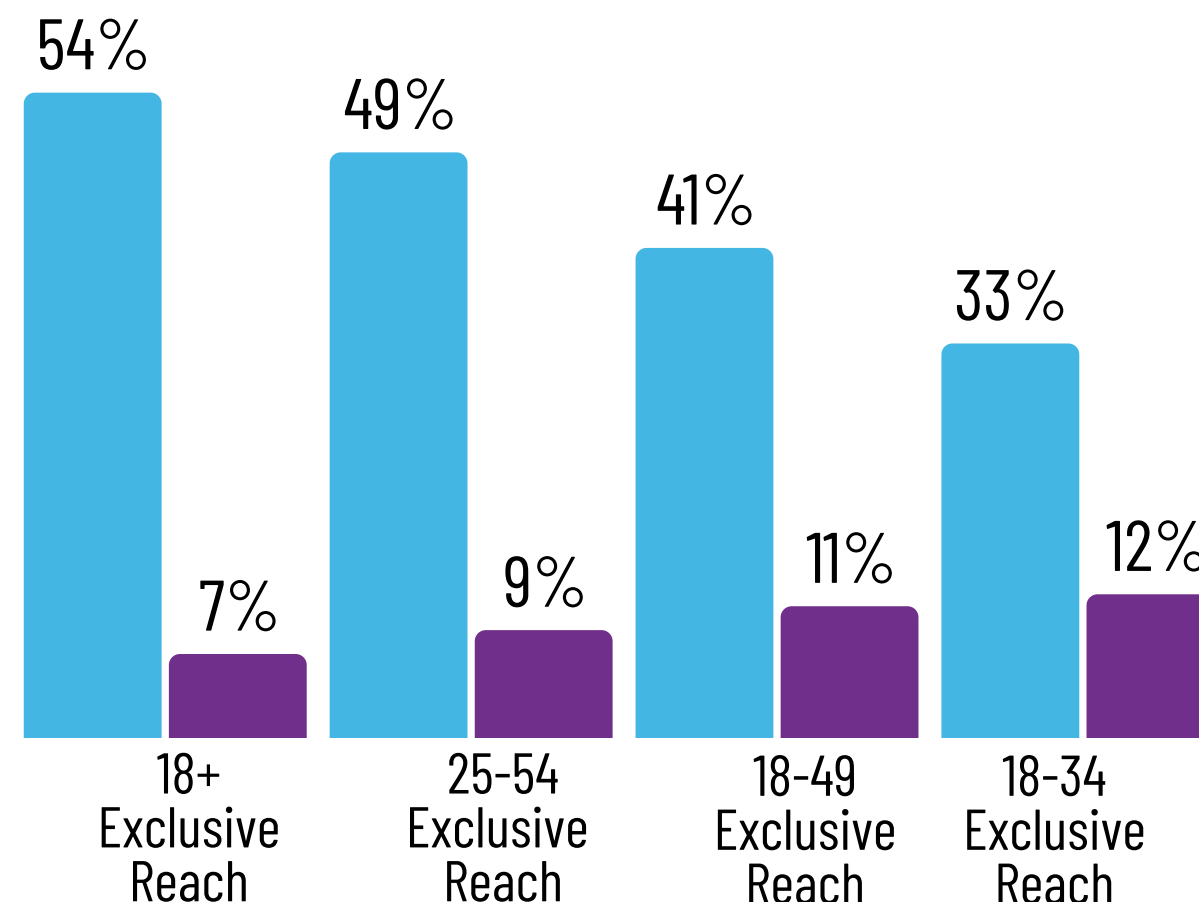
Live Radio has more than **11x the amount of listeners who listen to Radio and not Spotify**, compared to Spotify where only **5% of listeners listen to Free Spotify and not Radio**.

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 and not Spotify**, compared to 7% of 18+ who only listen to podcasts

For **18-49s**, Live Radio has almost **4x** the number of listeners to Radio 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

AMFM RADIO

FREE SPOTIFY

PODCASTS

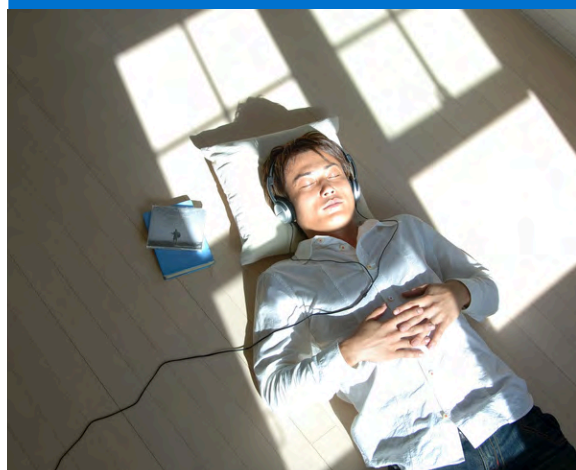
Key Takeaways

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 DIS-CONNECTING



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

SMARTPHONES ARE TAKING RADIO MOBILE



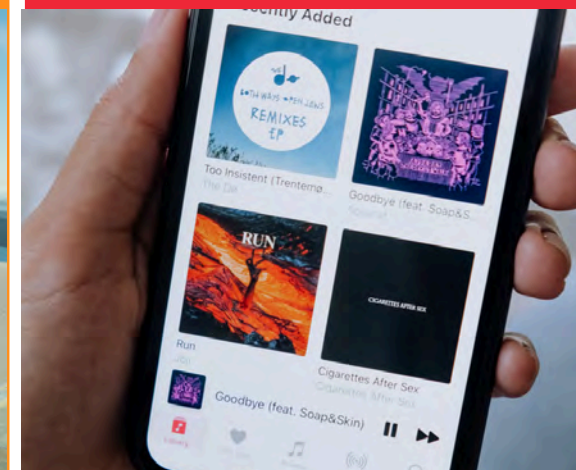
Smartphone are **growing** as the **digital device** of choice to **stream Live Radio**.

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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