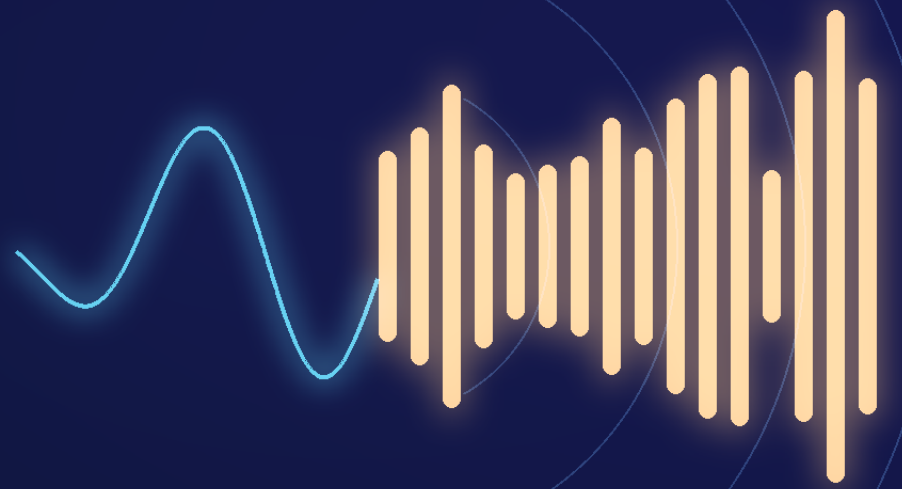
ANALYSIS · FRANÇOIS TESSIER · OCTOBER 2026

Turning Radio Listeners into Digital Audiences

Digital audio strategy and experience for Quebec radio



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EXECUTIVE SUMMARY

The essentials in three points

01
An existential challenge

Linear radio advertising revenue has stalled in a market under pressure. The one clearly identified growth pocket is digital advertising, fuelled by an audience radio already reaches every week.

02
Dual fluency as a rare asset

Digital audio transformations succeed when one leadership team commands both the codes of audio content and those of data and applied AI. The guiding principle: “value first, technology second.”

03
A trajectory to reverse

An illustrative projection built on public benchmarks points to 15–25% annual growth in digital revenue, driven by account creation, lower friction, programmatic audio and discoverability (GEO). A three-phase roadmap.

KEY SUCCESS FACTOR

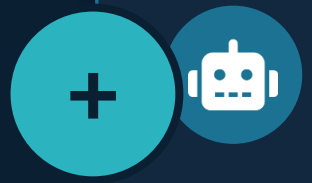
“Dual fluency” as a strategic asset

The transformation calls for two languages that rarely share the same team.



Audio content & brand

- Deep knowledge of francophone audiences and broadcasters
- Editorial judgment and audio storytelling codes
- Managing talent and star hosts
- Protecting the brand value of flagship stations



Digital transformation & AI

- Value-driven modernization programs
- Master data management (MDM) architecture
- AI engines (Python / Azure)
- Executive dashboards (Power BI)

Why it matters Digital audio transformations fail when they are led either by “content” people who underestimate data, or by “tech” people who erode brand value. Dual fluency holds the “value first” line: AI and technology serve the listening experience and revenue, never the other way around.

A linear powerhouse in a market moving to digital

+1.3%

growth in traditional audio (IAB/PwC 2025)

+10.2%

growth in digital audio (IAB/PwC 2025)

+83%

monthly active OHdio accounts after mandatory sign-in

+39.7%

audience revenue at Radio-Canada (H1 2025-26, Audiencers 2026)

The linear assets to convert

Reach	Flagship brands that reach millions of listeners every week, in every region
Voices	Star hosts who build a bond of loyalty no platform can copy
News	Local and regional newsrooms: a rare asset, hard to replicate
Ad sales	A sales force rooted with local and national advertisers

DIAGNOSIS — PART 2

...but a fragmented digital offer, with high leverage



Recurring pain points

- Unstable apps: crashes and load times flagged in app-store reviews
- Pre-roll ads that grate when the show already carries commercials
- Sign-in that is missing or cumbersome, so the listener goes unrecognized
- Content scattered across live, catch-up and podcasts, with no clear path



What is missing

- A unified, owned platform, on the model of OHdio
- An account strategy: no single cross-brand account
- Structured first-party data: no personalization, targeting or loyalty
- A “home” for podcasts, now scattered across Apple, Spotify and YouTube
- Durable digital assets: losing one star host can take part of the audience along

PILLAR 1

Vision and digital transformation

DIAGNOSIS No unified owned platform and no account strategy; scattered content; no product governance aligning sales, marketing and tech.

Solution paths

- Build a single owned digital audio platform: the “home” for all of the group’s audio (live, catch-up, podcasts, clips).
- An account-creation strategy: the precondition for personalization, ad targeting and loyalty.
- A quarterly product governance committee: one roadmap, trade-offs ranked by listener value.
- Dual distribution: maximum reach on third-party platforms, plus migration to the owned platform for data and margin.

Competitive benchmark

- OHdio (Radio-Canada): accounts mandatory since Nov. 2024, yet a third of visitors still have none, proof of both the stakes and the difficulty of the switch.
- QUB (Québecor): a converged, all-digital bet, but a small audience share.
- iHeartRadio (Bell): an aggregation model under an international brand.

PILLAR 2

User experience and consistency

DIAGNOSIS Documented friction: app crashes, badly placed pre-roll, load times, sign-in that is cumbersome or missing.

Solution paths

- An identification and data-collection strategy (data layer) compliant with Quebec's Law 25.
- Quick wins: stabilize the app, cut load times, recalibrate ad placement (frequency capping).
- Engagement UX: resume playback, "listen later" queue, speed control, offline mode, CarPlay / Android Auto, lean-back recommendations.
- Translate the brand vision into robust technical specifications: the heart of content-and-technology fluency.

Competitive benchmark

- BBC Sounds: the UK's #1 podcast app a year after launch, by unifying fragmented apps.
- BBC: mandatory sign-in → 9M signed-in active users a month by August 2017.
- Lesson: UX execution is the real battleground. OHdio and the private radio apps alike draw criticism for the experience, not the content.

PILLAR 3

Revenue growth and performance

DIAGNOSIS Linear advertising revenue is flat or declining; digital is the only growth pocket, yet it remains underdeveloped.

Solution paths

- Respectful monetization: programmatic audio, dynamic ad insertion (DAI), non-skippable formats with high completion rates.
- KPIs and targets: MAU/DAU, accounts created, listening time, completion rate, fill rate, ARPU, linear-to-digital conversion rate.
- Acquisition: convert the weekly linear audience into an identified digital audience through on-air calls to action and exclusive content.
- Discoverability / GEO: get cited by AI assistants, schema markup (Speakable), partnerships with aggregators.

Competitive benchmark

- IAB/PwC 2025: US digital audio $8.4B (+10.2%), podcasts $2.86B (+17.6%).
- By contrast: traditional audio +1.3%, TV −13.4%. Value is migrating to digital.
- US programmatic audio projected at $2.26B in 2025 (+18%). (Lower CPMs in French-speaking Canada → a cautious projection.)

PILLAR 4

Content

DIAGNOSIS Strong linear output (talk, sports, news), but French-language podcast listening in Quebec has plateaued (~26% of francophones, flat since 2022).

Solution paths

- Align brand and digital: extend the flagship brands into native digital content without diluting quality.
- Podcast / on-demand strategy: build on the stars, produce filmed conversations and segmented catch-up.
- Modern storytelling codes: short formats, shareable clips (audiograms), themed series.
- Watch global trends (video podcasts, AI audio, personalization) to keep Quebec's edge.

Competitive benchmark

- Sounds Profitable 2025: 71% of podcast creators now produce video.
- OHdio is betting on award-winning original podcasts, audiobooks and music playlists.
- Home advantage: 68% of Quebecers aged 15–29 listen to podcasts; 46% mostly to Quebec podcasts (ISQ 2024).

TECHNOLOGY LEVERS

Applying AI to digital audio

Personalized recommendation

Recommendation engines (collaborative filtering + NLP) that lift listening time and retention.

Transcription & segmentation

Turn hours of radio into podcasts, clips and audiograms (ASR) at low marginal cost.

Metadata & discoverability

Automatic tagging, topic modeling and classification, all in service of GEO.

GEO: getting cited by AI

Speakable schema and direct answers, to be cited by ChatGPT, Perplexity and AI Overviews.

Audience analytics

Executive Power BI dashboards to steer KPIs in real time.

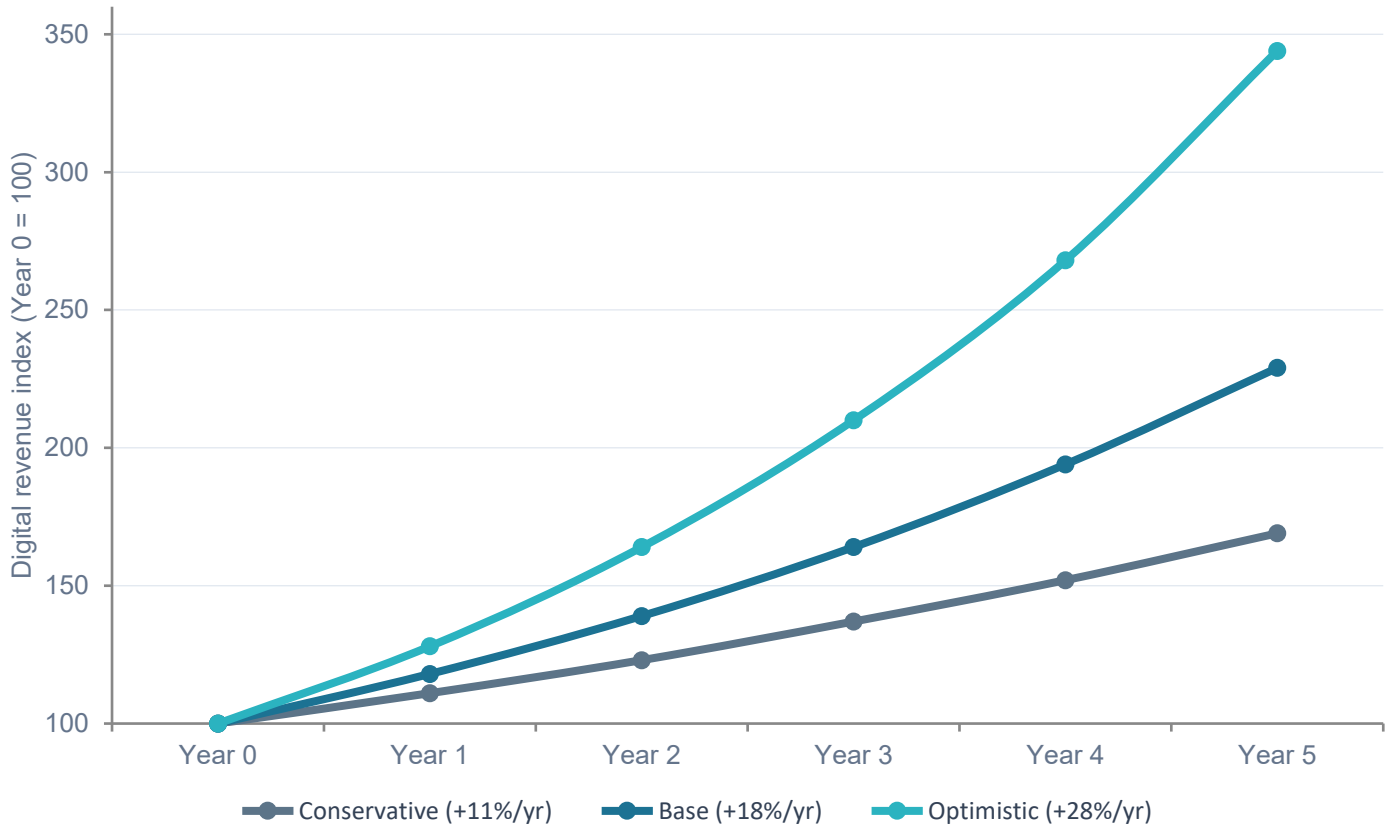
Moderation & compliance

Entity extraction, verification, responsible AI governance (Law 25).

Continuity, not a gamble The author designed and deployed Python / Azure AI engines and an MDM architecture in a $5.9M public-sector modernization program. The transcription → metadata → recommendation → dashboards chain carries straight over to audio.

ILLUSTRATIVE PROJECTION

Digital revenue growth over five years



Modeled growth drivers

- Linear-to-digital conversion: 3% → 12%
- Weighted average CPM: $12–20 (adjusted for Quebec)
- Fill rate: 40% → 70%
- Market growth: audio +10%/yr, podcasts +15%/yr

Result

Over 3–5 years, digital revenue **more than doubles** (base case) and **triples** (optimistic case), reversing the trajectory: digital growth versus linear decline.

⚠ *Illustrative scenarios built on public benchmarks (IAB/PwC) and explicit assumptions, not on any broadcaster's internal figures.*

EXECUTION

A three-phase roadmap

0–6 MONTHS
Quick wins

- Stabilize the app, cut load times
- Recalibrate ad placement
- Social login + single account (v1)
- Data layer + Law 25 compliance
- Set up the product governance committee
- KPI baseline (Power BI)

6–18 MONTHS
Foundational builds

- Roll out the unified owned platform
- Account strategy at scale
- AI pipeline: transcription → recommendation
- Dynamic ad insertion + programmatic
- Personalization v1

18–36 MONTHS
Scaling up

- Mature programmatic monetization + host-read
- Discoverability / GEO + partnerships
- Digital migration of regional markets
- Explore premium / subscription
- Continuous AI-driven optimization



CONCLUSION

Build the digital asset that will take over as the growth engine

The mandate is not to replace radio, but to turn a linear powerhouse (flagship brands, millions of listeners every week) into a direct, identified and monetizable relationship with each listener, while the linear radio ad market declines.

15–25%

targeted annual growth in digital revenue (base case)

→ ↑

less friction, more accounts, rising listening time

1

decisive execution factor: leadership fluent in both content and data

APPENDIX

Methodological limits & sources

Sourced facts vs illustrative assumptions

- Public data: audience and listening habits (Numeris, ISQ, Université Laval), IAB/PwC and Sounds Profitable benchmarks, results presented at Audiencers Montréal 2026, public app-store reviews.
- No internal broadcaster data: Quebec radio groups do not report their digital advertising revenue separately.
- The examples cited (OHdio, QUB, iHeartRadio, BBC Sounds) serve as reference points; they are not assessments of those services.
- The entire revenue projection (page 10) is illustrative. CPMs in US dollars; French-Canadian CPMs are lower → a cautious projection.

Main sources

- Numeris, news release (Dec. 10, 2025) · Centre d'études sur les médias (Université Laval)
- Audiencers Montréal 2026 (Radio-Canada; Les Coops de l'information) · La Presse (OHdio accounts) · National Audit Office UK (BBC)
- IAB / PwC, Internet Advertising Revenue Report 2025 · Sounds Profitable / Signal Hill, "The Creators 2025"
- Institut de la statistique du Québec (cultural practices 2024) · App Store / Google Play reviews

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Is your organization facing this challenge?

Let’s talk. A first conversation is often enough to frame the question, name what is blocking it and see where to start.

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