

# RADIO ON THE MOVE FALL 2018

A LOOK AT THE AUDIO LANDSCAPE AND  
IN CAR AUDIO BEHAVIOURS

APRIL, 2019





# YEAR 10 OF A ROBUST STUDY



**3500+**  
CANADIANS 18+



**ONLINE SURVEY IN FIELD NOVEMBER/EARLY DECEMBER 2018**

A representative sample of 3,505 Canadians 18+ from Maru Voice Canada.





# OBJECTIVES

RADIO ON THE MOVE FALL 2018



## Investigate

How and when audio is being consumed, both in-car and throughout the day.

## Inform

What are the implications for the media and advertising communities.

## Identify

Emerging technologies and the opportunities they present.



# GLOSSARY OF TERMS



DEFINITIONS USED IN THIS REPORT



## Streamed AM/FM

Broadcast AM/FM radio streamed either through an app or a station's website.



## Pureplay music streaming

Streaming of music services available *online only*, such as Spotify, Apple Music subscription service, and cbcmusic.ca



## Paid ad-free

Paid subscriptions to pureplay services that allow on-demand access with no advertising (e.g., Spotify Premium)



## Ad-supported

Pureplay service options that include advertisements, but do not have a subscription fee.



## Owned Music

Digital or analog music sources not reliant on a subscription. Examples included CD's purchased MP3's (from iTunes, etc.) or vinyl.



## YouTube for Music

Using YouTube to listen to music, as opposed to video content such as comedy, DIY, or long-form programming. Not to be confused with YouTube premium.

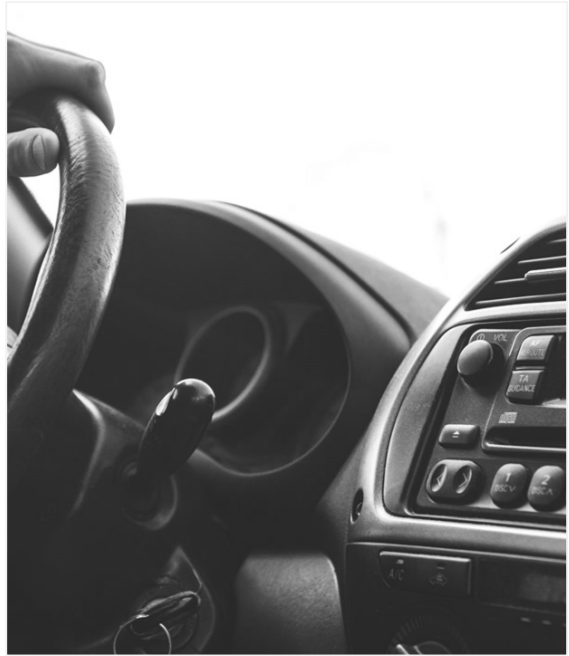


## Podcasts

Pre-recorded digital audio programs, usually spoken word, that you can subscribe to in a feed and/or download to listen to later.



# CANADIANS ARE LISTENING TO MORE AUDIO THAN EVER BEFORE



---

Technology is generating more listening opportunities for Canadians. Increased use of smartphones and smart speakers are making audio available wherever and whenever people want to listen.





# THE AUDIO UNIVERSE IS EXPANDING



TECHNOLOGY IS CHANGING HOW CANADIANS MANAGE THEIR PERSONAL MUSIC— FROM OWNING TO RENTING

Albums (physical & digital) sales

**- 21%**

2017-2018

Audio Streams

**+ 50%**

2017-2018

Spotify listeners pay for ad-free

**63%**

2018

Time AD18+ spend with audio

2012-2017

**+ 25%**

in millions of hours

**MTM** | Where do Canadians Listen to Radio?

Close to 9 in 10 Canadians have listened to AM/FM radio in the past month

Listened to AM/FM Radio\*  
Canadians, 18+ | %

Radio listening has been stable for over a decade.

**88%**

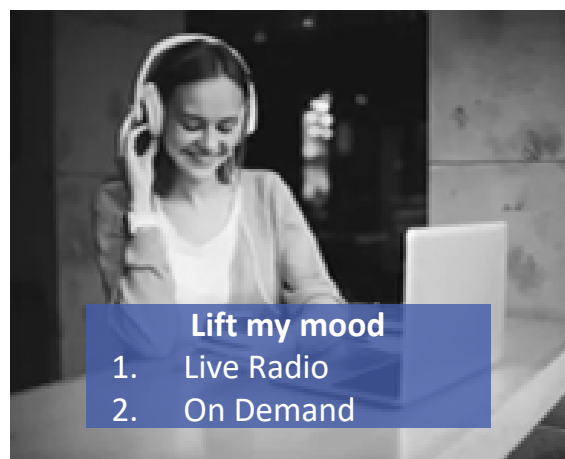
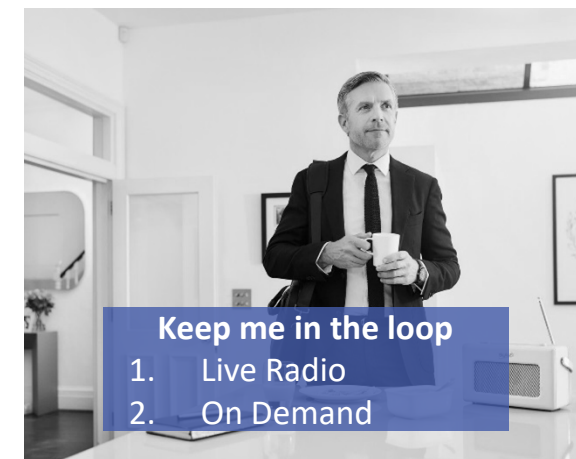
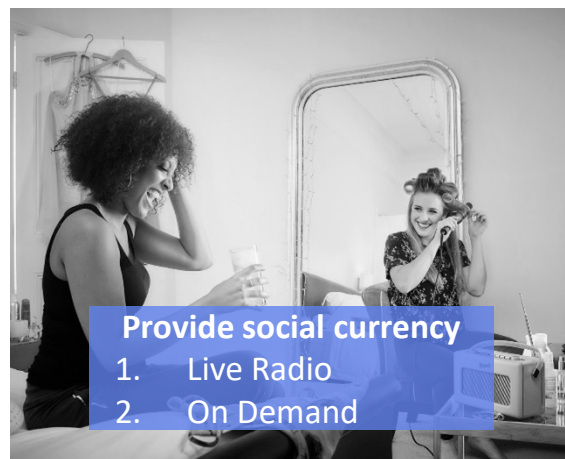
# THE UNIQUE ROLE OF LIVE RADIO

LIVE RADIO EFFORTLESSLY CONNECTS LISTENERS TO THE OUTSIDE WORLD

ON-DEMAND AUDIO (E.G., PUREPLAY STREAMING, OWNED MUSIC, PODCASTS) PUTS THE LISTENER IN CONTROL OF THEIR WORLD

Live radio fulfills more needs states for audio than on-demand audio.\*

\*Radiocentre.org/Audio Now | The Sound Research





# A DAY IN THE LIFE OF AUDIO CONSUMPTION



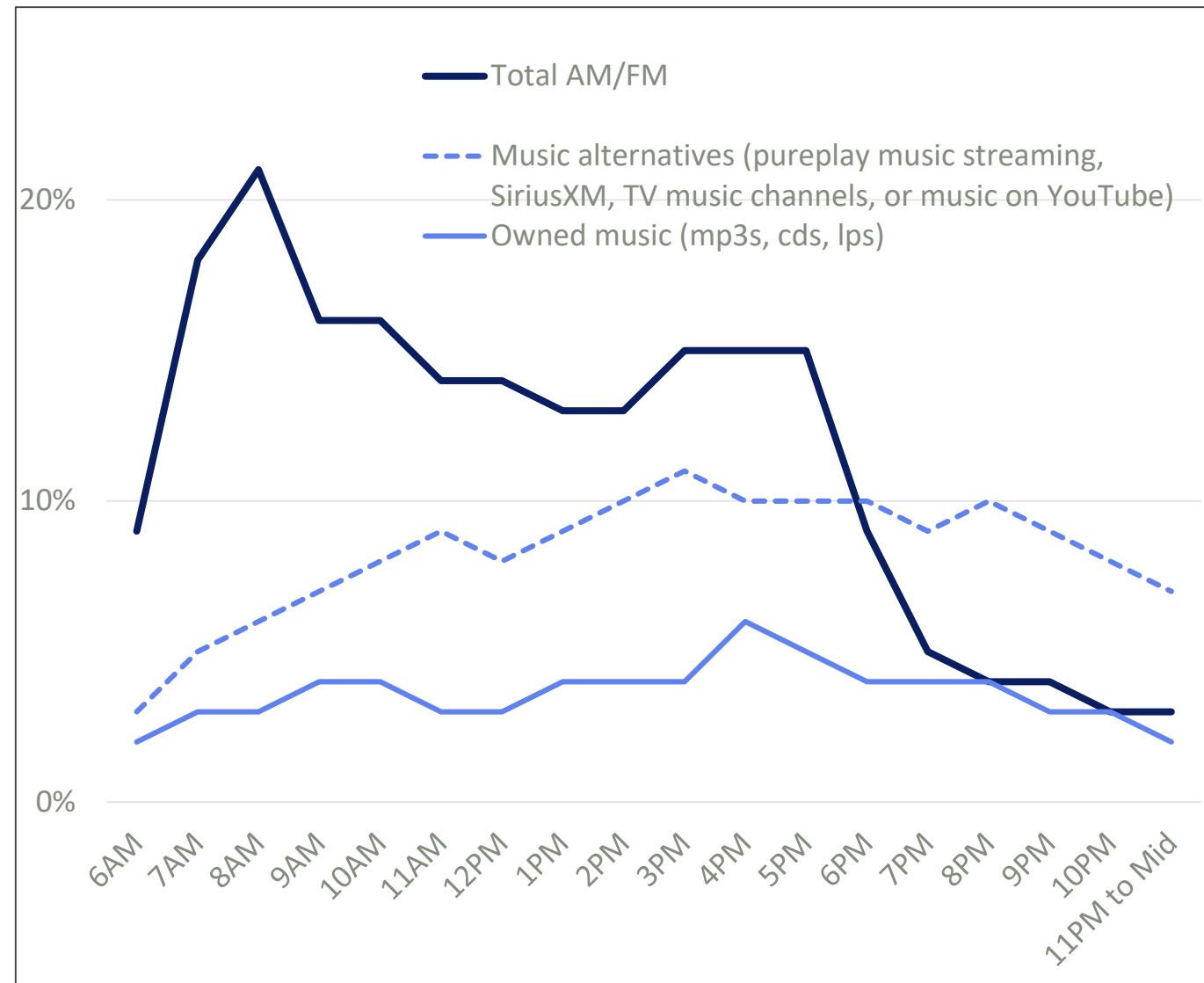


# DURING THE DAY AND WHILE AT WORK

AM/FM connects throughout the day.

AM/FM dominates when retailers are open for business. People are listening to personal music on “their own time.”

% LISTENING TO EACH AUDIO TYPE IN EACH HOUR



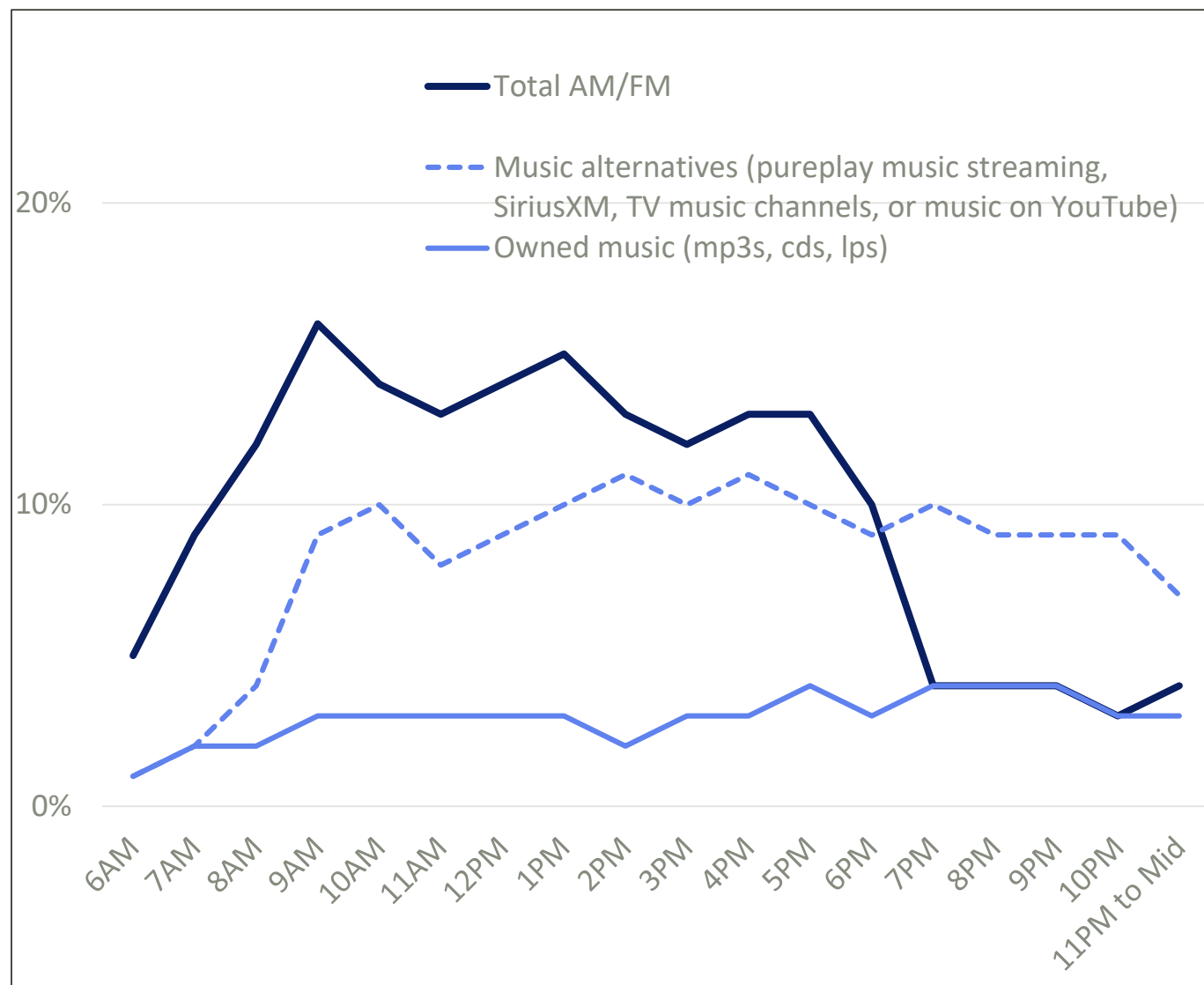


# WHILE 'OUT AND ABOUT' ON THE WEEKENDS

People are tuning into AM/FM during their busy weekends.

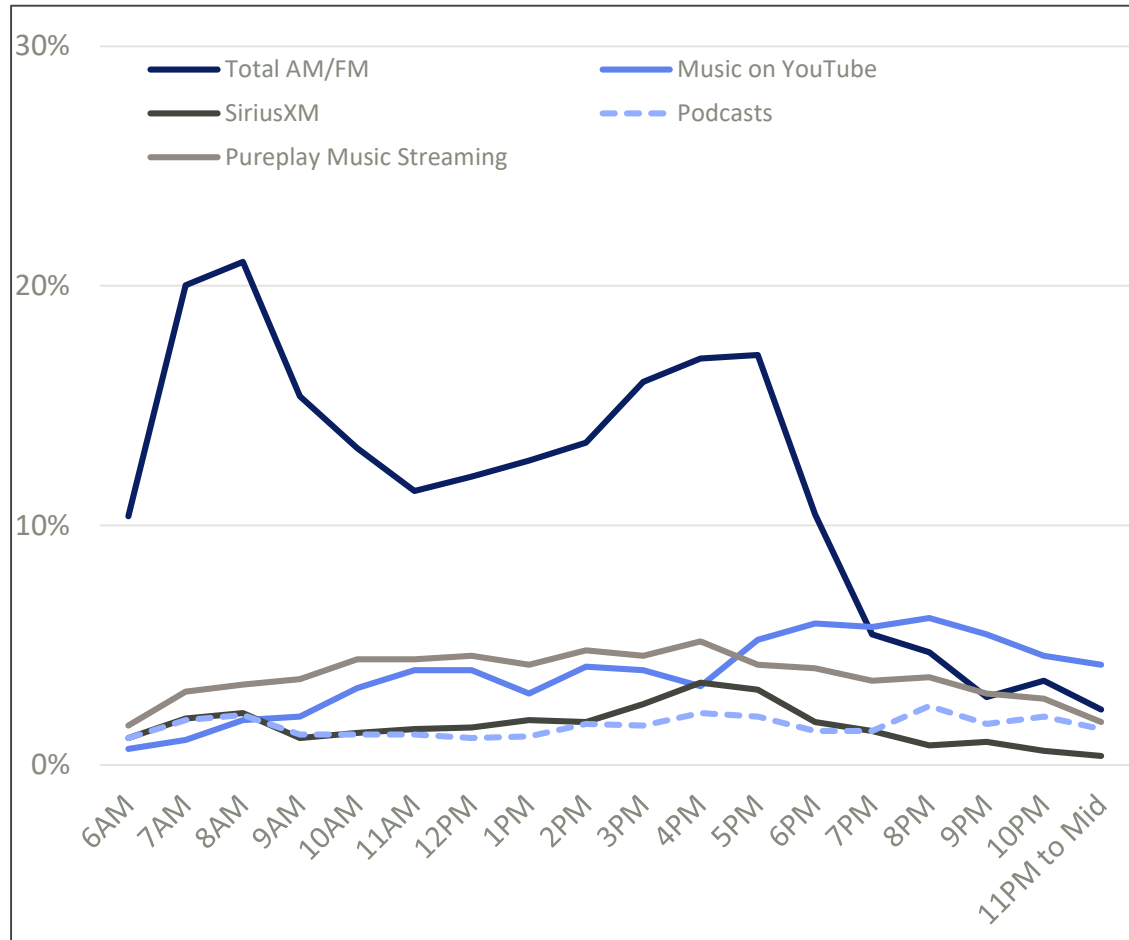
When evening comes, they disconnect with personal music.

% LISTENING TO EACH AUDIO TYPE IN EACH HOUR

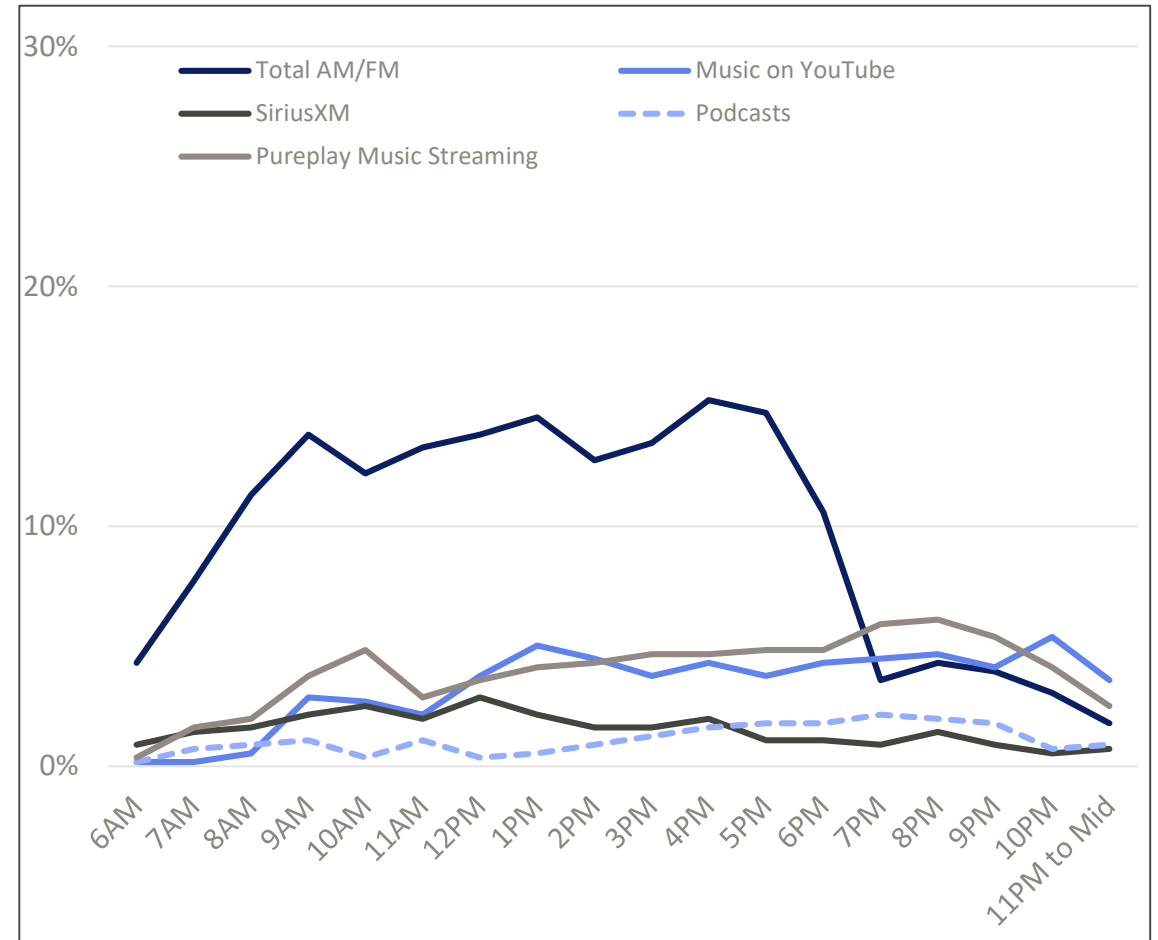


# AM/FM MOST-LISTENED-TO AD SUPPORTED AUDIO

% LISTENING TO EACH AUDIO TYPE IN EACH HOUR



WEEKDAY



WEEKEND



# AUDIO STREAMING VARIES BY DEVICE

FOR PERSONAL AUDIO , CANADIANS USE THEIR PHONES; FOR STREAMED AM/FM, THEY USE LAPTOPS/DESKTOPS AND SMART SPEAKERS

Devices used among past week listeners to each type of audio



SMART PHONES

## Personal Audio

- Pureplay music streams 60%
- Podcasts 58%
- Audio books 44%
- Owned music 37%
- Music on YouTube 35%
- Streamed AM/FM 27%



LAPTOPS AND DESKTOPS

## YouTube | Radio

- Music on YouTube 62%
- Streamed AM/FM 45%
- Pureplay music streams 36%
- Owned music 32%
- Audio books 30%
- Podcasts 29%



TABLET

## Audio books

- Audio books 19%
- Music on YouTube 16%
- Podcasts 11%
- Streamed AM/FM 10%
- Pureplay music streams 10%
- Owned music 8%



SMART SPEAKERS

## Personal Music | Radio

- Pureplay music streams 10%
- Streamed AM/FM 7%
- Podcasts 5%
- Audio books 5%
- Owned music 2%
- Music on YouTube 1%



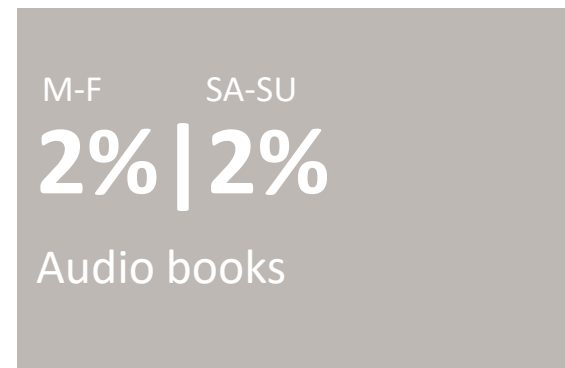
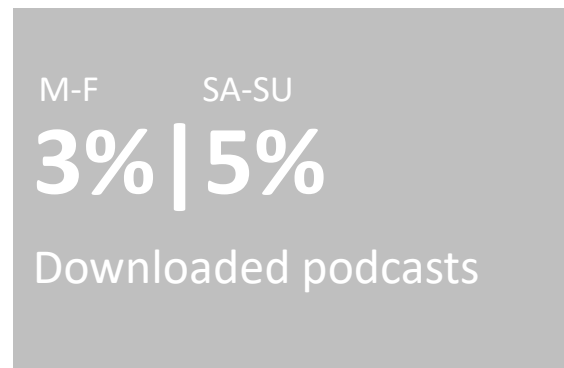
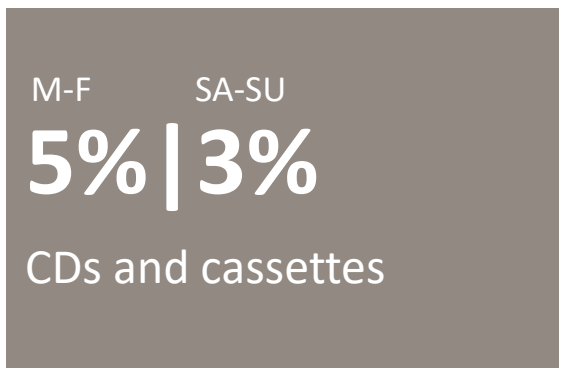
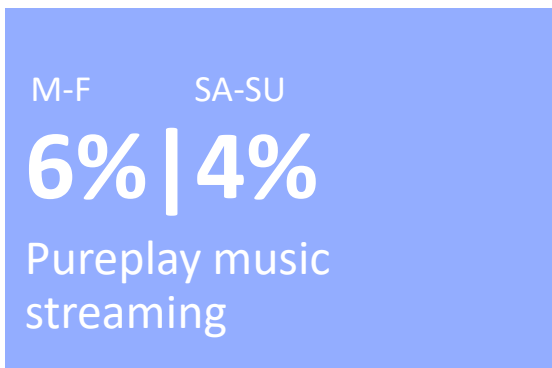
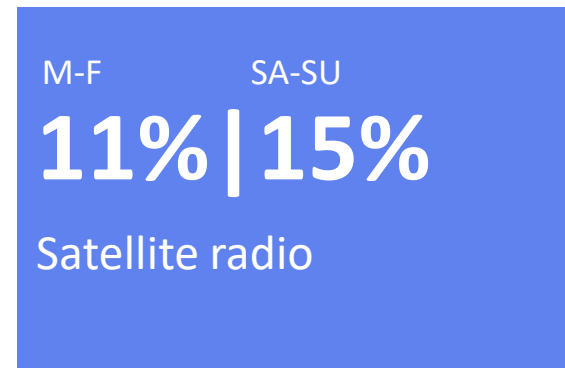
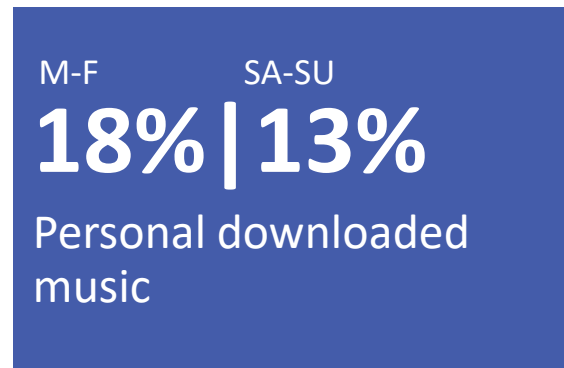
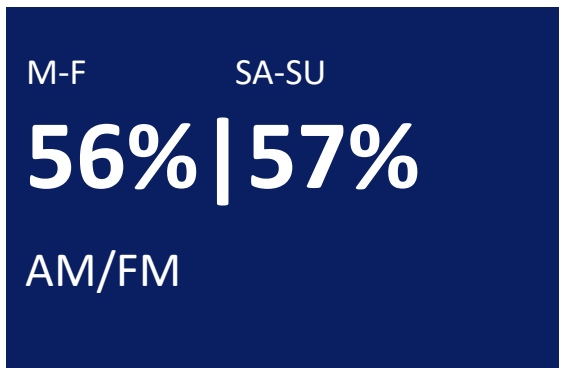
# IN CAR AUDIO



# IN CAR TUNING TO AM/FM CONSISTENT MO-SU

DESPITE MORE AUDIO CHOICES AVAILABLE, CANADIANS CHOOSE TO LISTEN TO AM/FM MOST THROUGHTOUT THE ENTIRE WEEK

## % Share of In-Car Audio Consumption



Q.C1a. When was the last time, if ever, you did the following in a private vehicle?  
 Q.C2. Thinking of all the time you spent in the vehicle yesterday, how much time did you spend doing the following?  
 Base: Canadians, aged 18+, in private vehicle at least once per week (n=3,145)

# AM/FM AN IMPORTANT FEATURE IN NEW CARS

MORE IMPORTANT THAN AUTOMATIC BRAKING, PARALLEL PARKING ASSIST OR APPLE CAR PLAY / ANDROID AUTO

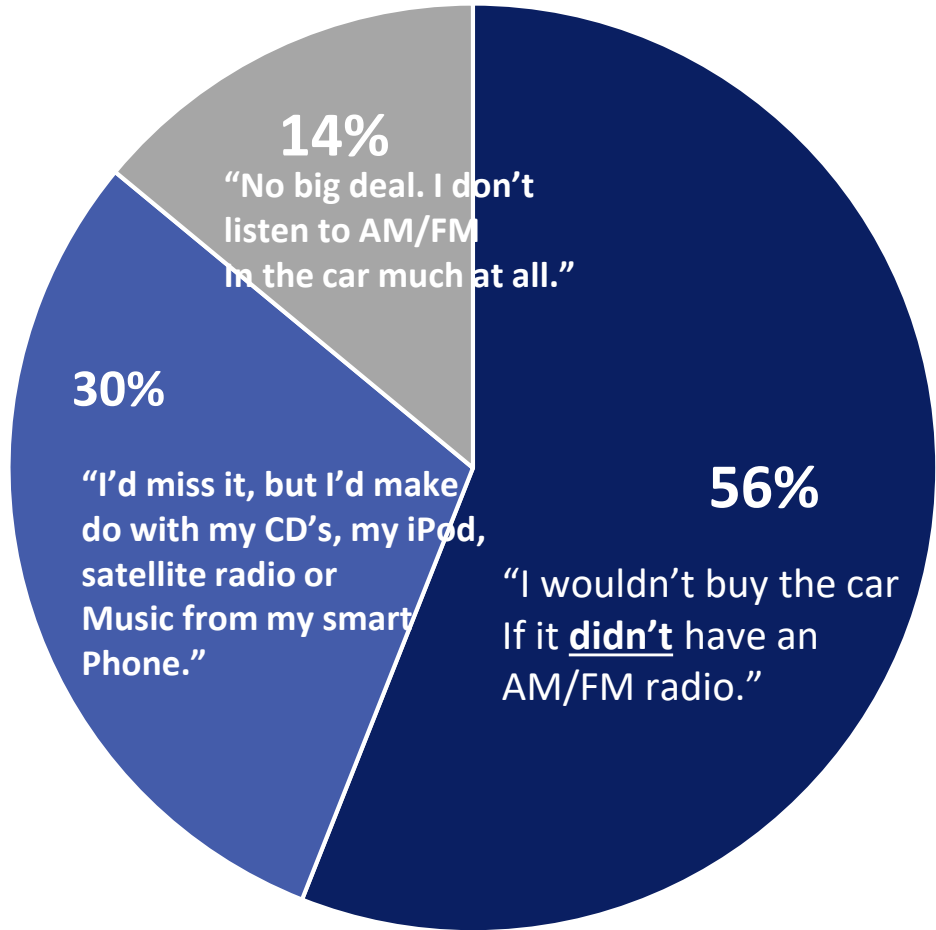
% Who Ranked as <u>Most</u> Important	iPhone Users	Android Users
Backup camera	<b>41%</b>	<b>32%</b>
AM/FM radio	<b>25%</b>	<b>31%</b>
Driver assist features (such as automatic braking)	<b>14%</b>	<b>16%</b>
Apple CarPlay/Android Auto	<b>12%</b>	<b>13%</b>
Automatic parallel parking	<b>8%</b>	<b>9%</b>





# AM/FM A 'MUST HAVE' FOR NEW CAR BUYERS

MOST CANADIANS WOULDN'T BUY A NEW VEHICLE IF IT DID NOT COME WITH A RADIO



Q7. To what extent would you miss an AM or FM radio if it wasn't available in the next car you bought?  
Base: Canadians 18+ who intend to purchase a new car in the next year (n=377)



# AM/FM RADIO PROVIDES THE SOUNDTRACK FOR THE LAST MILE IN THE PATH TO PURCHASE

Listened to AM/FM Radio While Going To—or Doing This—Yesterday



79%

Stopped at the drug store or pharmacy



78%

Went to a movie



77%

Visited a car or truck dealership



76%

Went to the bank



76%

Visited a hardware or home improvement store



76%

Serviced car or truck



75%

Picked up groceries



74%

Went to a shopping mall or plaza



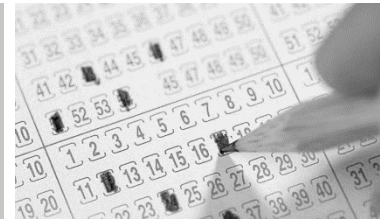
74%

Visited a fast food / drive thru



74%

Stopped for wine, beer, liquor



73%

Pick up lottery tickets



67%

Stopped at a coffee shop

C5d. And still thinking about the time you spent in a private vehicle yesterday, did you do any of these things while driving, or use your vehicle to get there? C5e. Were you listening to AM/FM radio in the car while doing or going to this? Base: Canadians, aged 18+, in private vehicle yesterday (n=2,752); Did activity yesterday (base varies)



# THE STREAMING LANDSCAPE



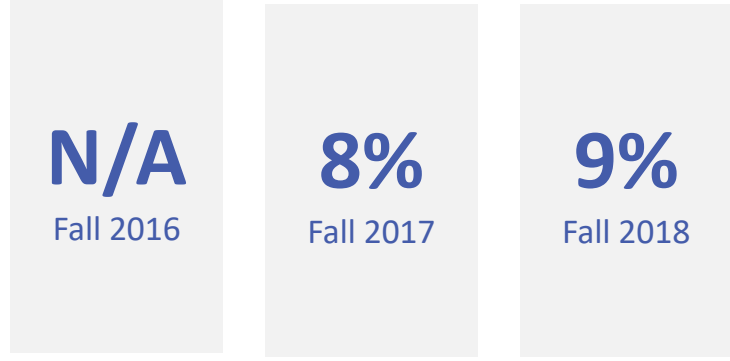
# PUREPLAY MUSIC STREAMING CONTINUES TO GROW

THE BUSINESS MODEL CONTINUES TO EVOLVE FROM 'OWNING' TO 'RENTING' MUSIC LIBRARIES YEAR OVER YEAR

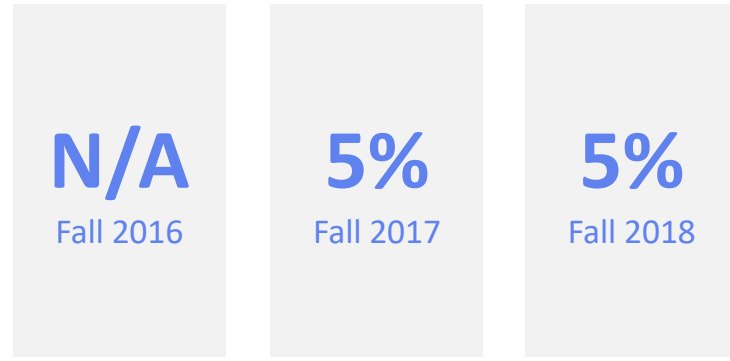
## SPOTIFY WEEKLY YOY



## APPLE MUSIC WEEKLY YOY



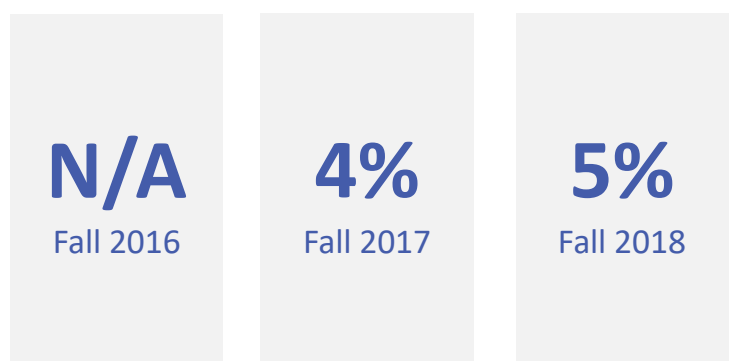
## GOOGLE PLAY UNLIMITED WKLY YOY



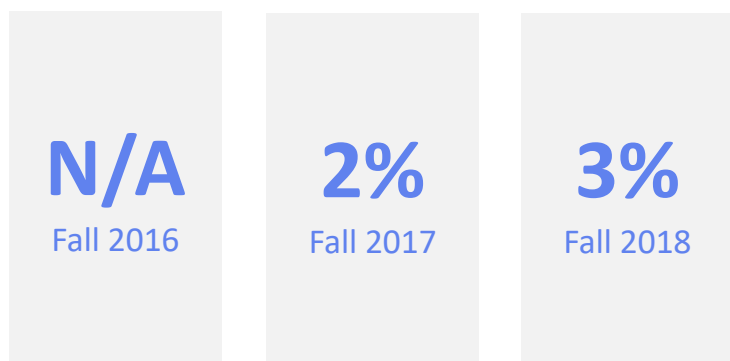
## SPOTIFY DAILY YOY



## APPLE MUSIC DAILY YOY



## GOOGLE PLAY UNLIMITED DAILY YOY



F13. Overall, thinking of all locations, how often, if ever, would you say you listen to:  
Base: Canadians 18+: 2018 (n=3,505); 2017 (n=3,470); 2016 (n=2,026)

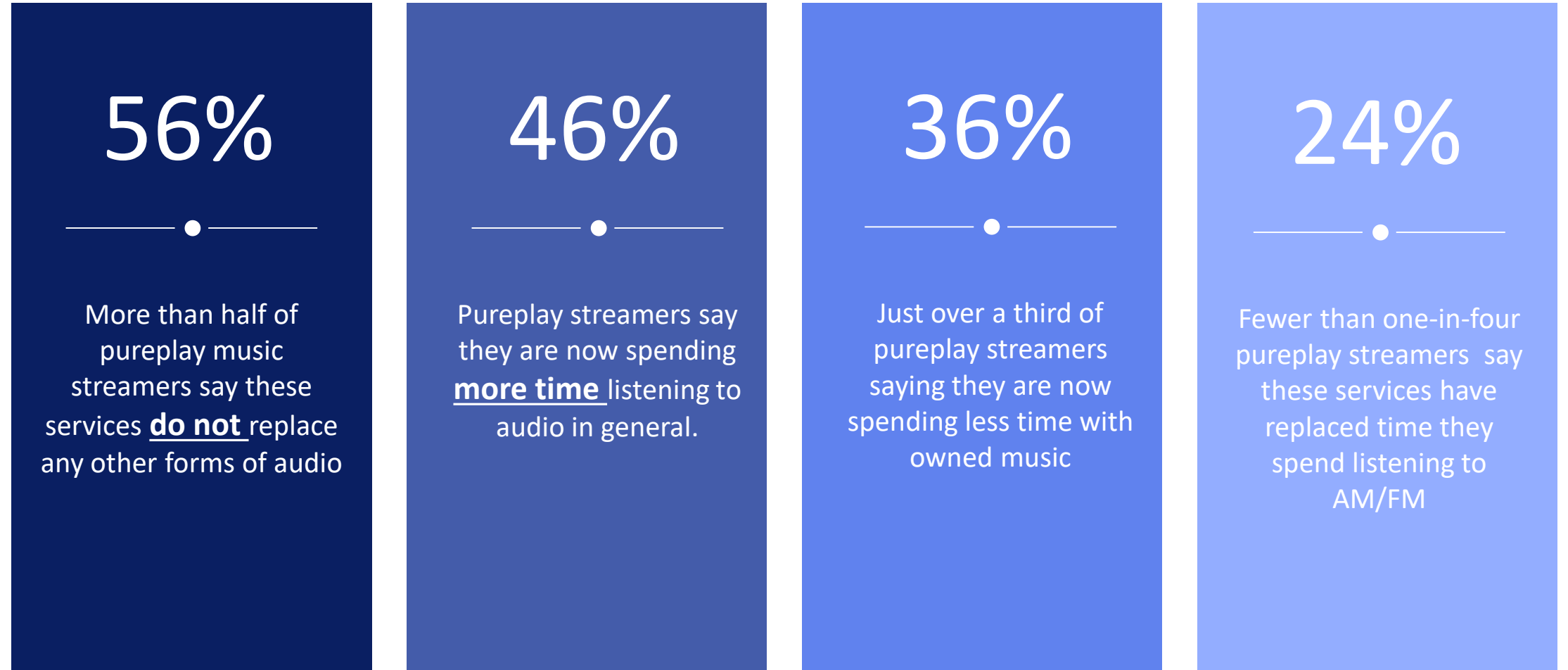


# STREAMING MUSIC ADDS TO TIME SPENT WITH AUDIO



ITS OVERALL IMPACT IS LARGELY ADDITIVE OR NEUTRAL ON OTHER AUDIO CONSUMPTION

Among Canadian Adults who Listened to Pureplay Music Services in the Past Month



F16c. How would you say that the time you spend listening to music streaming services has affected the amount of time you listen to music or audio in general?

F16d. What other types of audio has listening to music streaming services replaced?

Base: Canadians 18+ who listened to music streaming services in the past month (n=1,201)



# KEY REASONS TO LISTEN TO PUREPLAY STREAMING

ON-DEMAND ACCESS TO A LARGE LIBRARY OF PERSONAL FAVOURITES ARE THE KEY DRIVERS FOR PUREPLAY MUSIC STREAMING



**66%**  
To listen to any song when I want to hear it

**58%**  
Access to big library of music

**45%**  
Discover new music

**36%**  
Have something to listen to on my phone

**33%**  
For the playlists they offer

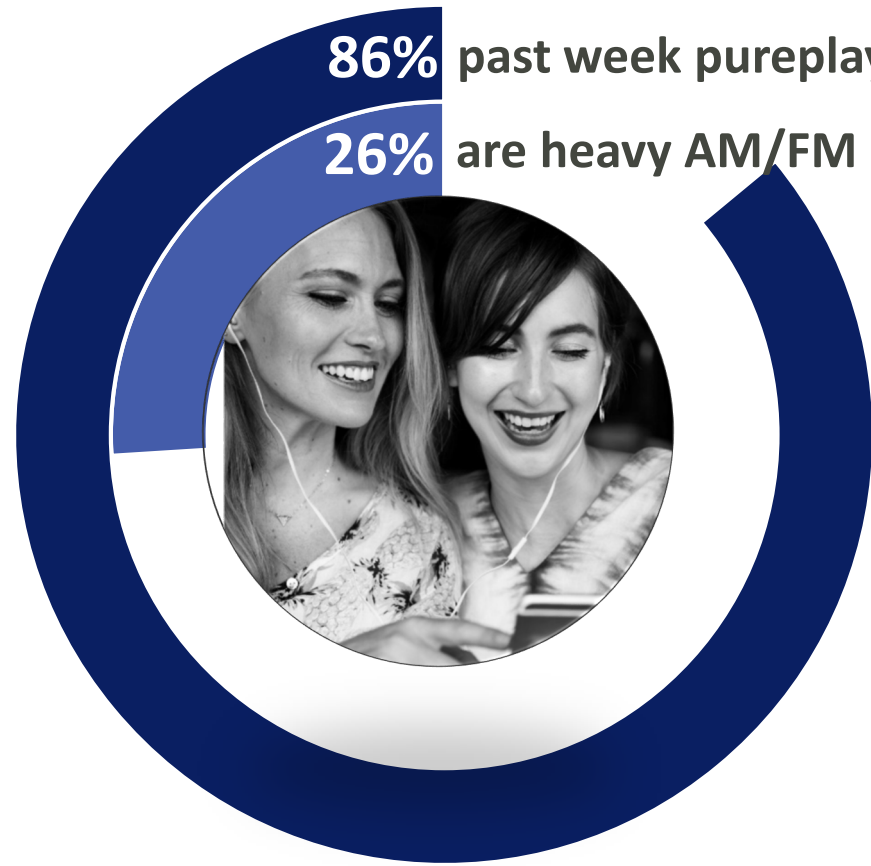
**30%**  
To get songs/artists I can't get on the radio

**14%**  
To share songs I like with others



# PUREPLAY STREAMERS LISTEN TO AM/FM TO CONNECT

PUREPLAY STREAMERS LISTEN TO RADIO MUCH LIKE OTHER CANADIANS. UNLIKE PERSONAL MUSIC, RADIO PROVIDES CONNECTION.



## Why Listen to AM/FM?

(Past week Pureplay Streamers Who Listen to AM/FM 2+Hrs/Day)

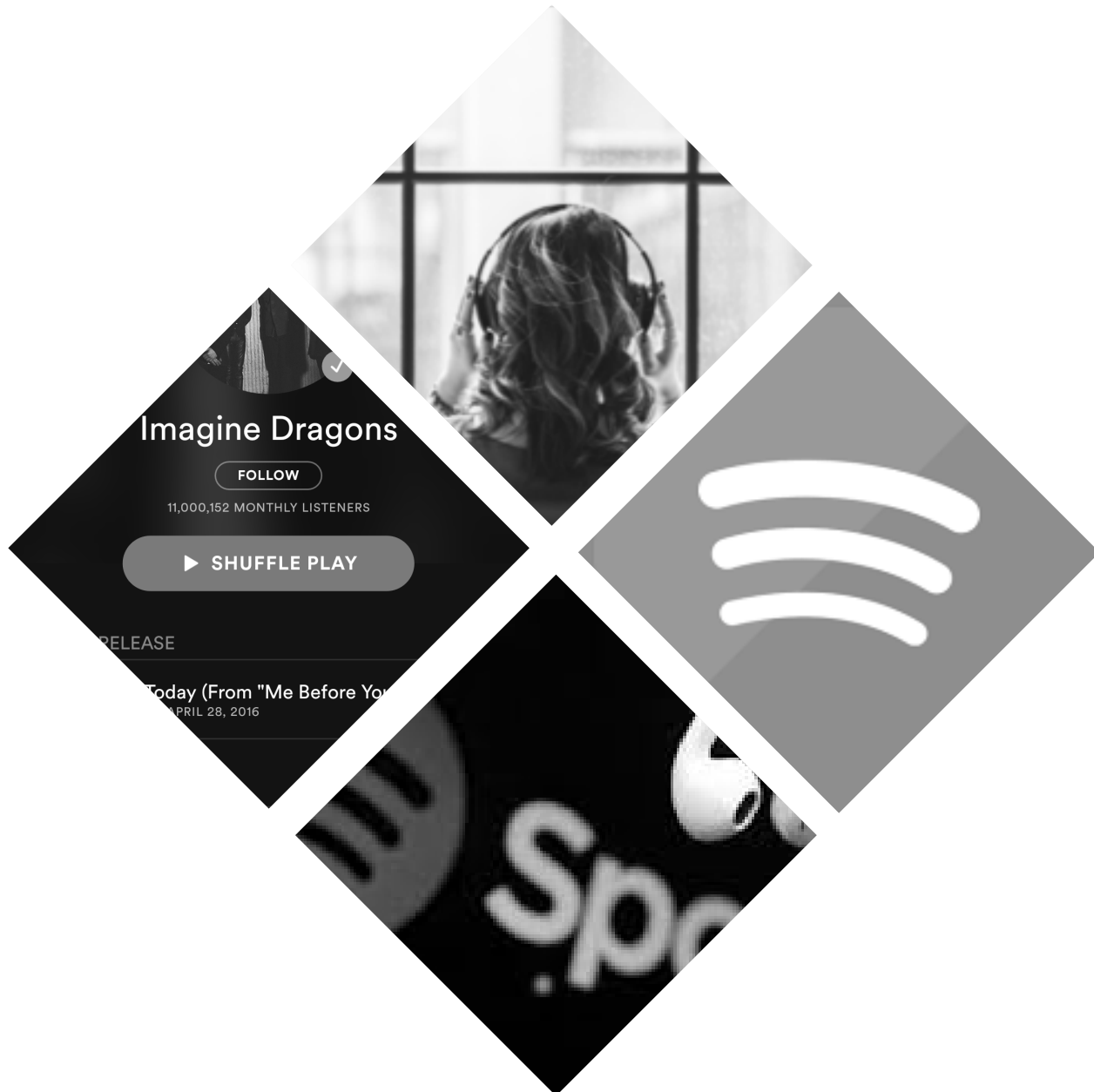
**71%**  
To get practical info

**61%**  
To hear what’s happening in general

**51%**  
For the local connection

**46%**  
For the human connection

F16e. Given all the other ways you have to listen to music, which of the following reasons best describe why you still listen to AM or FM radio?  
Base: Canadians 18+ who listened to music streaming service/YouTube for Music in past month AND listen to 2+ hours of radio on typical weekday (n=650)



SPOTIFY

# SPOTIFY IS AT ODDS WITH ITSELF IN THE ADVERTISING SPACE

SPOTIFY'S BUSINESS MODEL DOES NOT SUPPORT AN ADVERTISING MODEL

GET PREMIUM

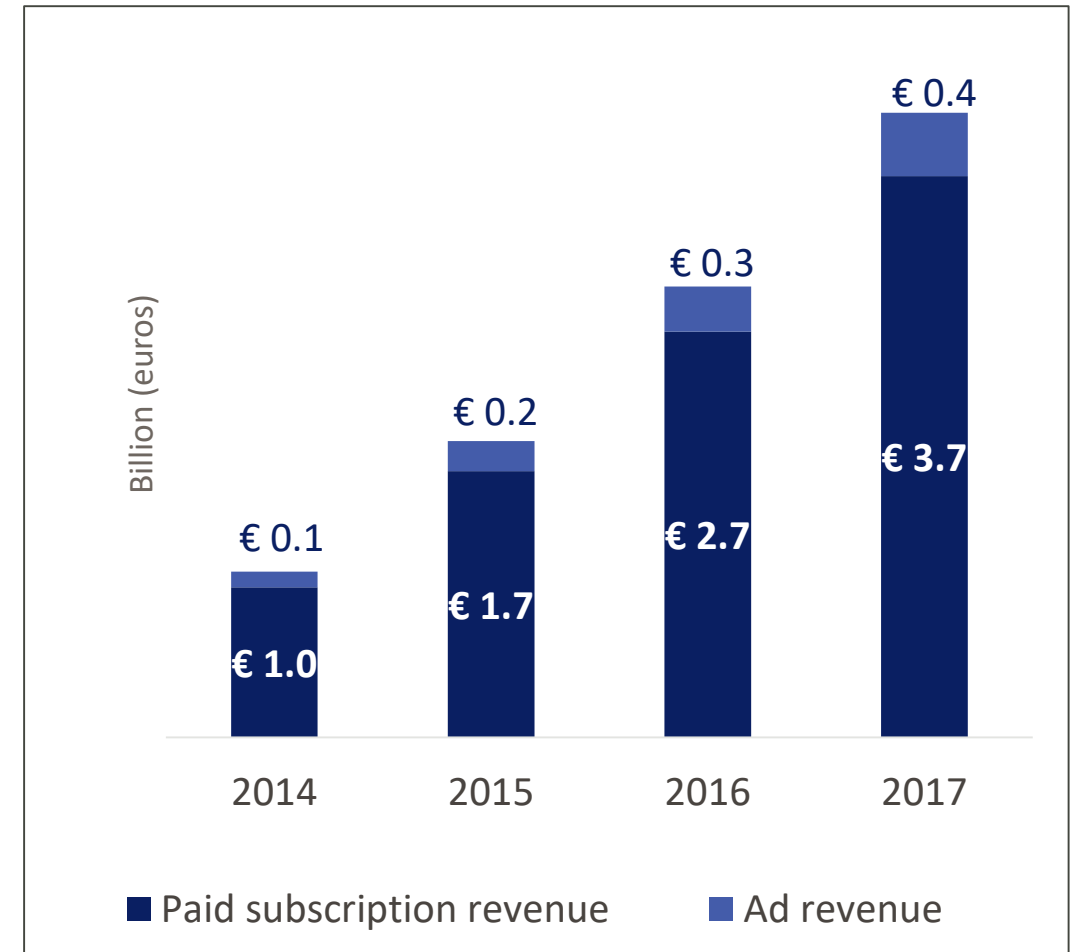
“Listen without ads.  
Enjoy nonstop music.”

Aggressive promotion of the paid ad-free Spotify Premium service reduces both the quantity and quality of the audience reached by advertisers.



“Reach your audience where visual media can't”

Spotify gets **90%** of its global revenues from paid subscribers. Ad revenue is low.



Source: Spotify IPO  
([https://www.sec.gov/Archives/edgar/data/1639920/000119312518063434/d494294df1.htm#rom494294\\_12](https://www.sec.gov/Archives/edgar/data/1639920/000119312518063434/d494294df1.htm#rom494294_12)), Summarized by Recode (<https://www.recode.net/2018/2/28/17064460/spotify-ipo-charts-music-streaming-daniel-ek>)

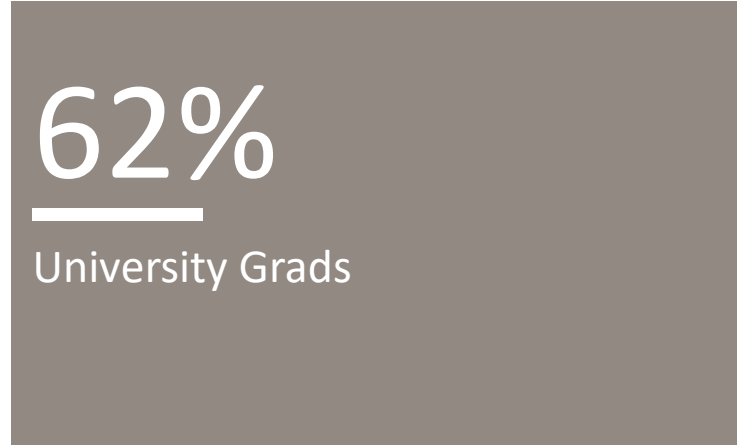
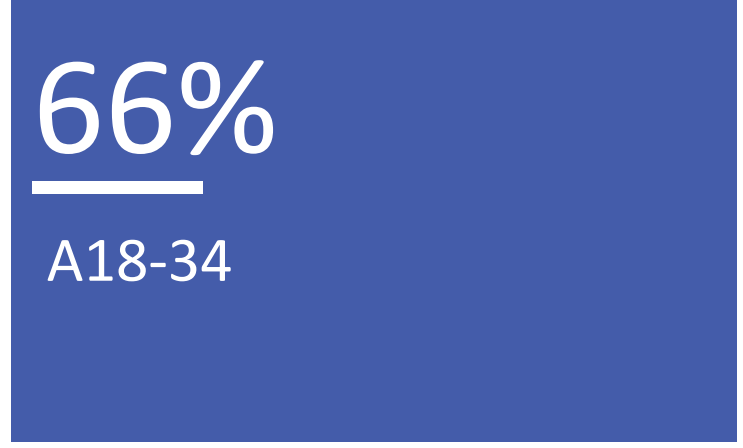




# CANADIANS ARE DISCONNECTING FROM SPOTIFY ADS

THE MOST DESIRABLE TARGETS ARE NOT BEING REACHED BY ADS

Daily Spotify Listeners who Choose Paid Ad-Free vs. Ad-Supported Spotify Subscription



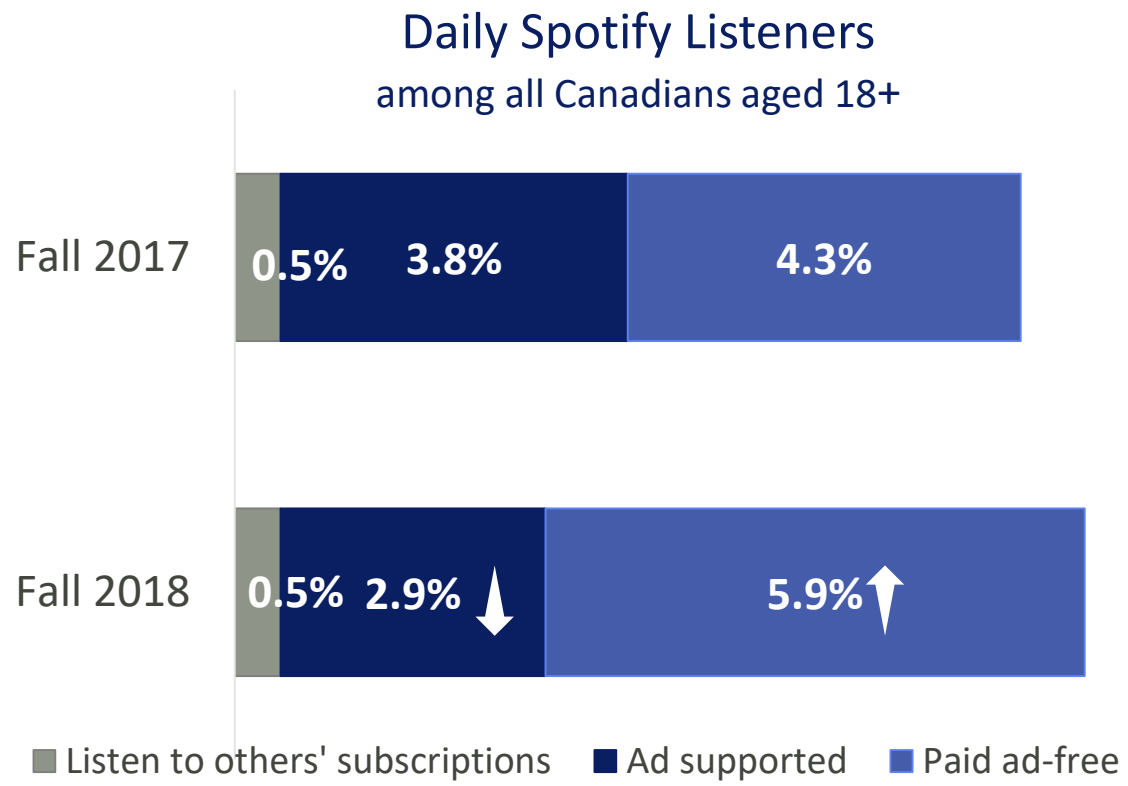
F16a. You mentioned listening to Spotify. Which of the following best describes your Spotify subscription?  
Base: Daily Spotify listeners (n=309) \*excludes those without a subscription (6% of total).



# SPOTIFY IS GROWING, BUT ONLY AMONG PAID AD-FREE SUBSCRIBERS

REACH OF ADS DECLINES AS THE % OF CANADIANS LISTENING TO AD SUPPORTED SPOTIFY DAILY DROPS FROM 3.8%-2.9%

	SPOTIFY USAGE	
	Weekly	Daily
2017	16.0%	8.6%
2018	18.6%	9.4%

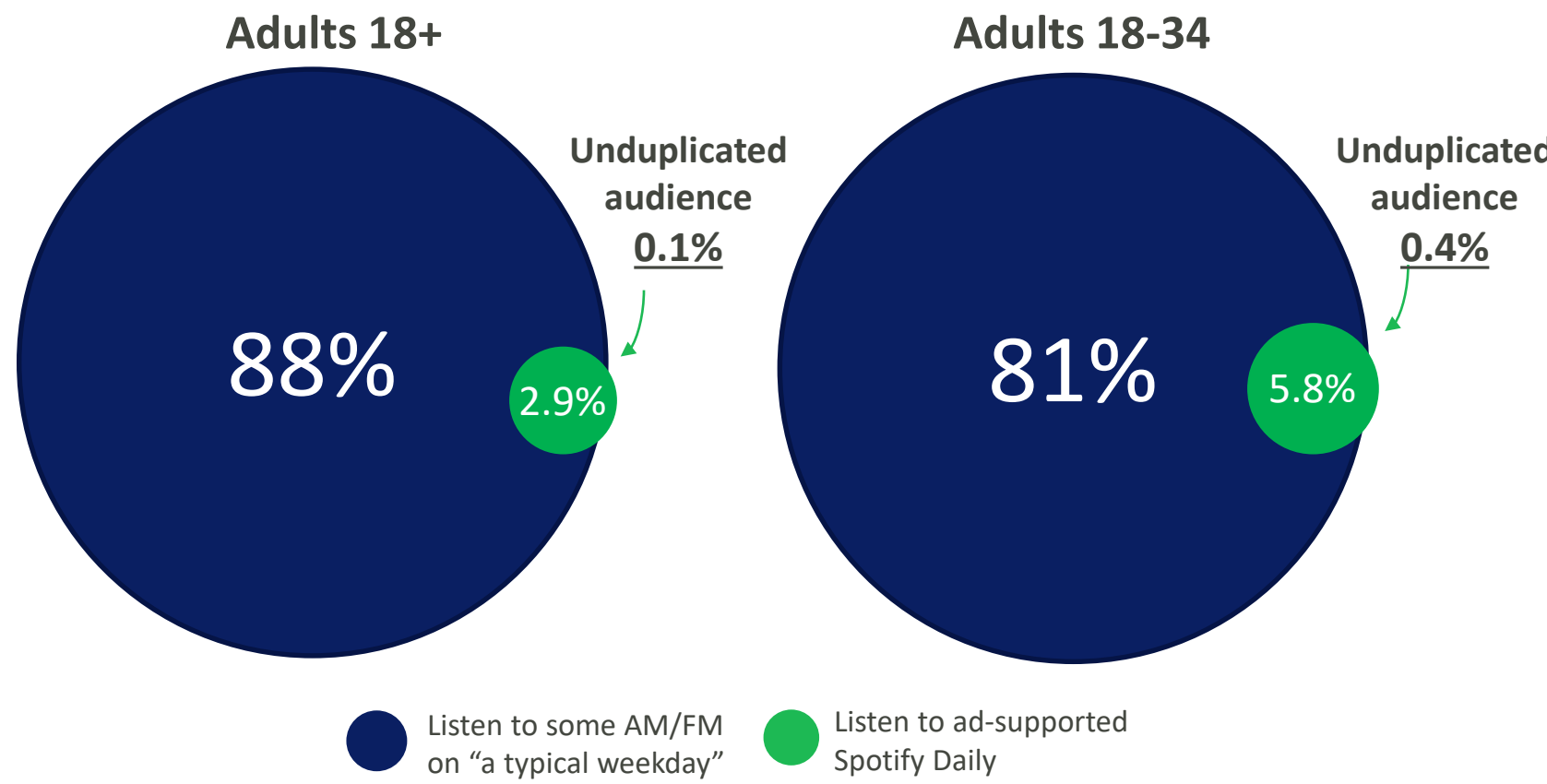


F13. Overall, thinking of all locations, how often, if ever, would you say you listen to Spotify?  
 F16a. You mentioned listening to Spotify. Which of the following best describes your Spotify subscription?  
 Base: Canadians 18+, Fall 2017 (n=3,452) Fall 2018 (n=3,505)



# SPOTIFY LISTENERS ARE ALSO AM/FM LISTENERS

THE VAST MAJORITY OF DAILY AD-SUPPORTED SPOTIFY LISTENERS SAY THEY ALSO LISTEN TO AM/FM RADIO "ON A TYPICAL WEEKDAY."



E1. Thinking of all the time you may listen at home, in the car, or at work, how much time in total do you spend listening to AM or FM radio stations during a typical weekday?  
Base: Canadians 18+ (n=3,505) and 18-34 (n=1,078), Daily listeners to ad-supported Spotify 18+ (n=98), and 18-34 (n=48)



# SPOTIFY REPLACES OWNED MUSIC FOR PAID AD-FREE SUBS



THE #1 REASON TO PAY FOR SPOTIFY IS TO DOWNLOAD SONGS TO PLAY OFFLINE



**41%**  
Download songs to listen offline

**36%**  
No commercials

**23%**  
To have access to almost any song on demand

F16a\_2. You mentioned earlier that you have a paid subscription to Spotify. Please rank, in order of their importance to you, what makes having a paid subscription better than having a free version of Spotify?  
Base: Canadians 18+ with a paid subscription to Spotify (n=278)



## YOUTUBE FOR MUSIC

YouTube is the #1 source for streaming music in Canada. More than half of Canadians use YouTube for music monthly, mostly to find a specific song they want to hear.



# MOST CANADIANS ACCESSED YOUTUBE FOR MUSIC IN THE PAST MONTH

MUSIC FANS AGED 18-34 ARE ESPECIALLY LIKELY TO USE YOUTUBE FOR MUSIC



58%

Canadians 18+ listened in the past month

82%

Canadians 18-34 listened in the past month

42%

Canadians 18+ listened in the past week

65%

Canadians 18-34 listened in the past week

# SONGS, ON DEMAND, ARE A KEY DRIVER FOR USING YOUTUBE FOR MUSIC

NEARLY 2/3s OF USERS SAY THEY STREAM YOUTUBE FOR MUSIC TO LISTEN TO ANY SONG THEY WANT WHEN THEY WANT IT

## Reasons to Stream YouTube for Music



**65%**

To listen to any song I want when I want to hear it

**33%**

To have access to almost any song ever recorded

**28%**

To discover new music

**14%**

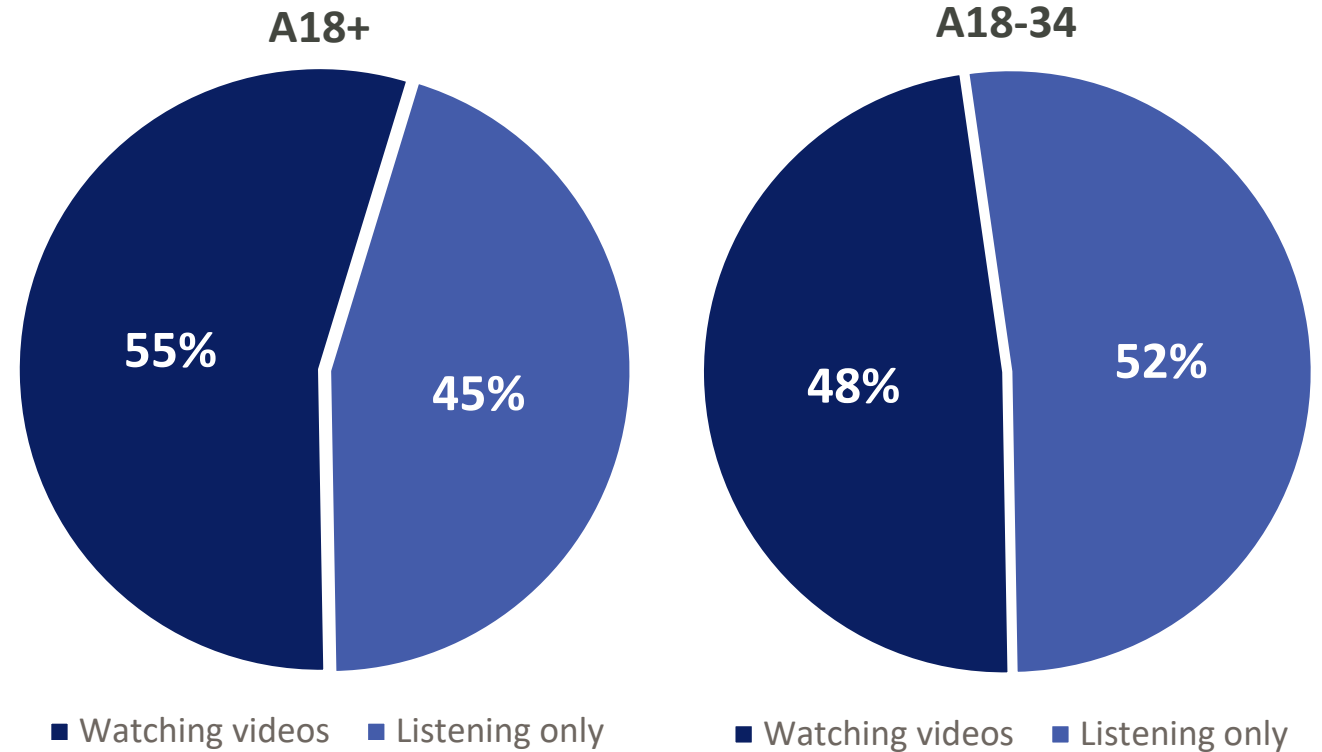
For the playlists they offer

# SOME ARE WATCHING VIDEOS; OTHERS ARE ONLY LISTENING

ABOUT HALF THE TIME SPENT WITH YOUTUBE FOR MUSIC IS SPENT LISTENING, NOT WATCHING VIDEOS



Average % of Time Spent Watching vs. Listening Only when Using YouTube for Music (Past Month Users)



B3B. When is the most recent time, if ever, you listened to the following types of audio on ANY DEVICE?  
F10b. [Mean Summary] Of all the times you spend going to YouTube for music, approximately how much of that time would you say you spend:  
Base: Canadians 18+ (n=3,505). 18-34 (n=679) / who streamed YouTube to listen to Music in the past month 18+ (n=1,948) 18-34 (n=554)

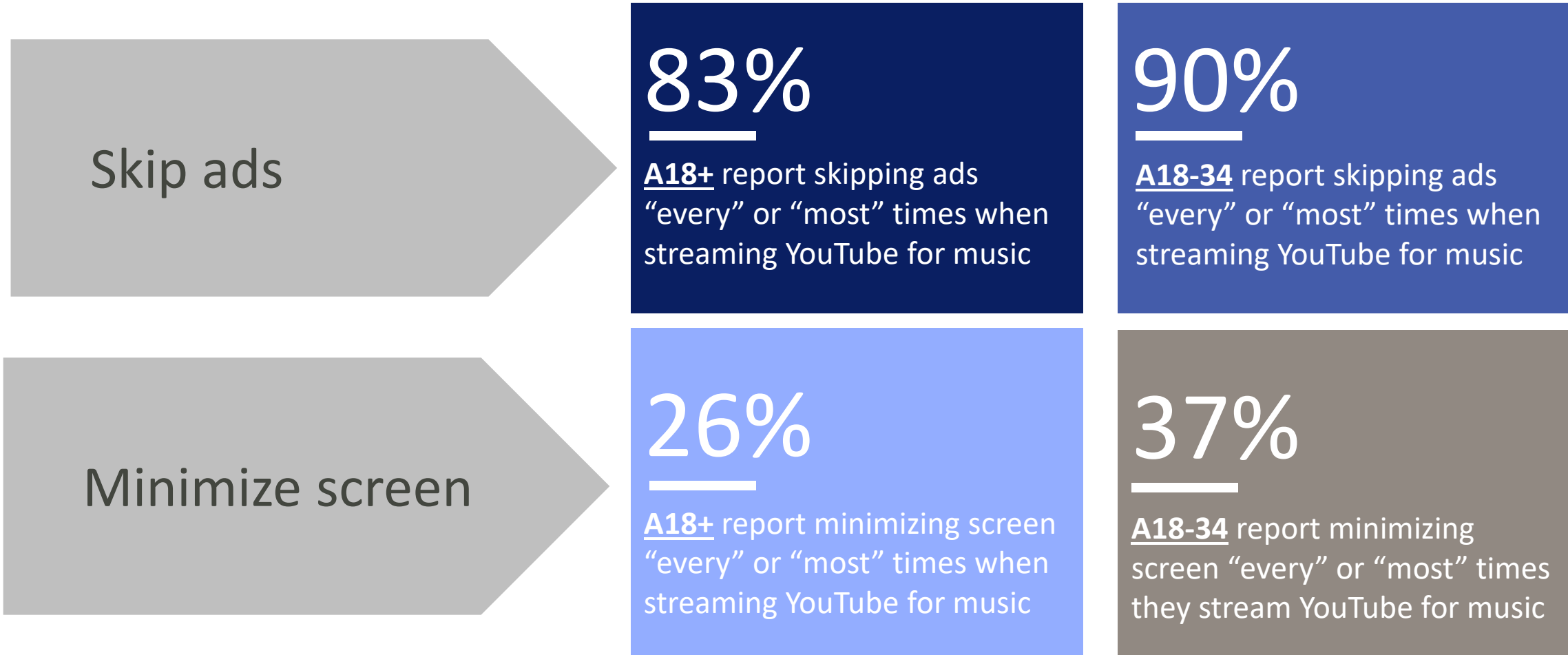




# ADS TYPICALLY GO UNWATCHED WHEN STREAMING YOUTUBE FOR MUSIC



18-34 YEAR OLDS ARE PARTICULARLY LIKELY TO MINIMIZE THE SCREEN AND SKIP ADS WHEN THEY USE YOUTUBE FOR MUSIC





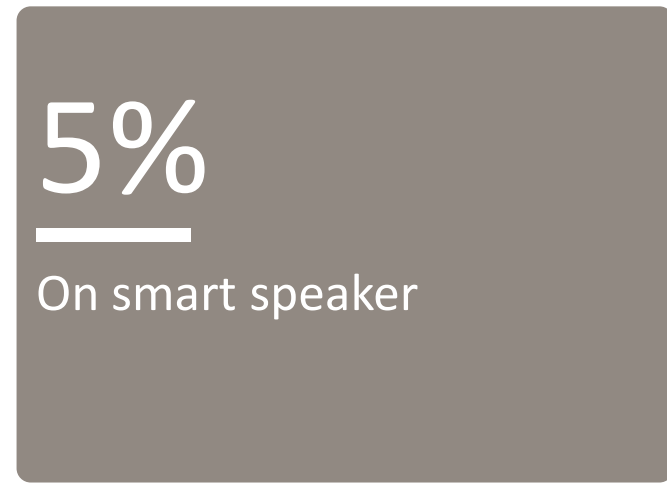
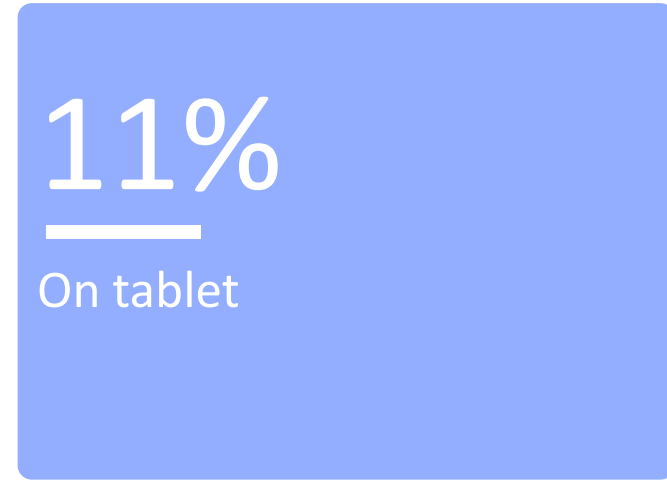
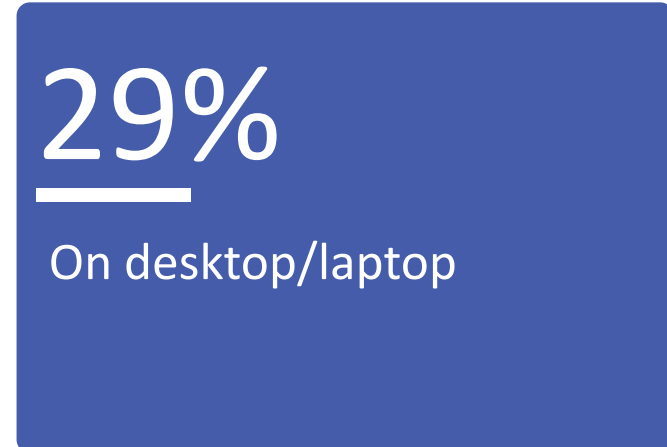
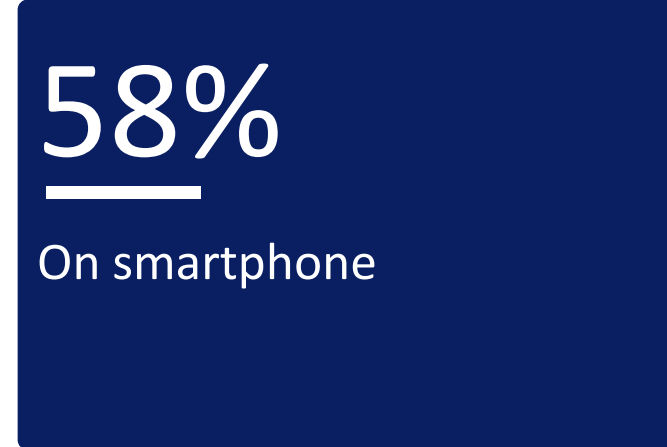
# PODCASTING



# PODCAST LISTENERS LISTEN MAINLY ON THEIR PHONE

PAST WEEK PODCAST LISTENERS ARE 2x AS LIKELY TO HAVE LISTENED TO PODCASTS ON THEIR PHONE VS. A DESKTOP/LAPTOP

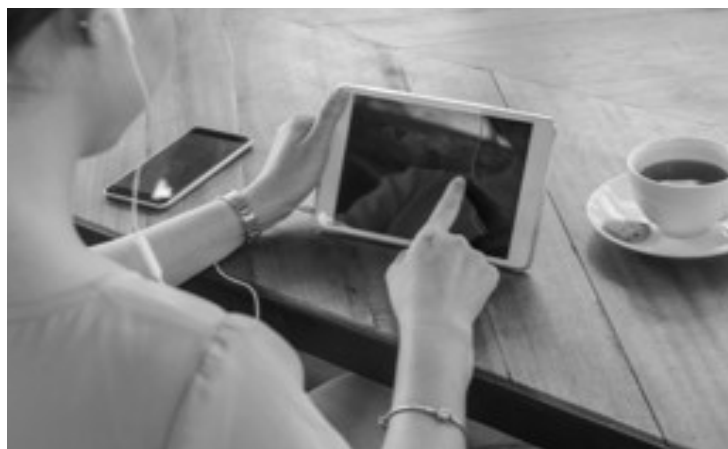
## DEVICE USED TO LISTEN TO PODCASTS IN PAST WEEK





# MOST PODCAST LISTENING TAKES PLACE AT HOME

Average % of time spent listening to podcasts



**58%**  
At home

**18%**  
In the car

**12%**  
At work

**7%**  
On transit

**4%**  
Another location

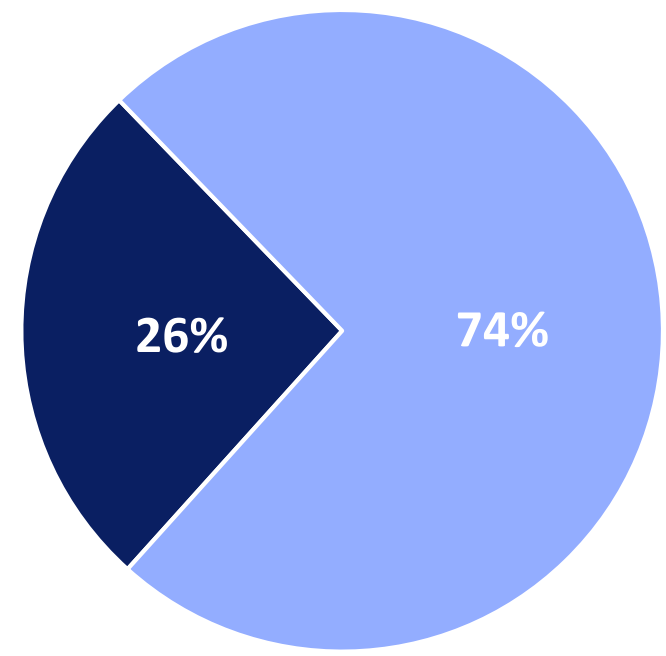


# CANADIAN PODCAST LISTENING INCLUDES AM/FM CATCH UP PODCASTS

MORE THAN 4-IN-10 PAST MONTH PODCAST LISTENERS (41%) INCLUDE AM/FM SHOWS AS PART OF THEIR PODCAST LISTENING. AM/FM PROGRAMS ACCOUNT FOR MORE THAN ¼ OF THE TIME THEY REPORT SPENDING WITH PODCASTS.



Average % of time spent listening to podcasts  
(among past month podcast listeners)



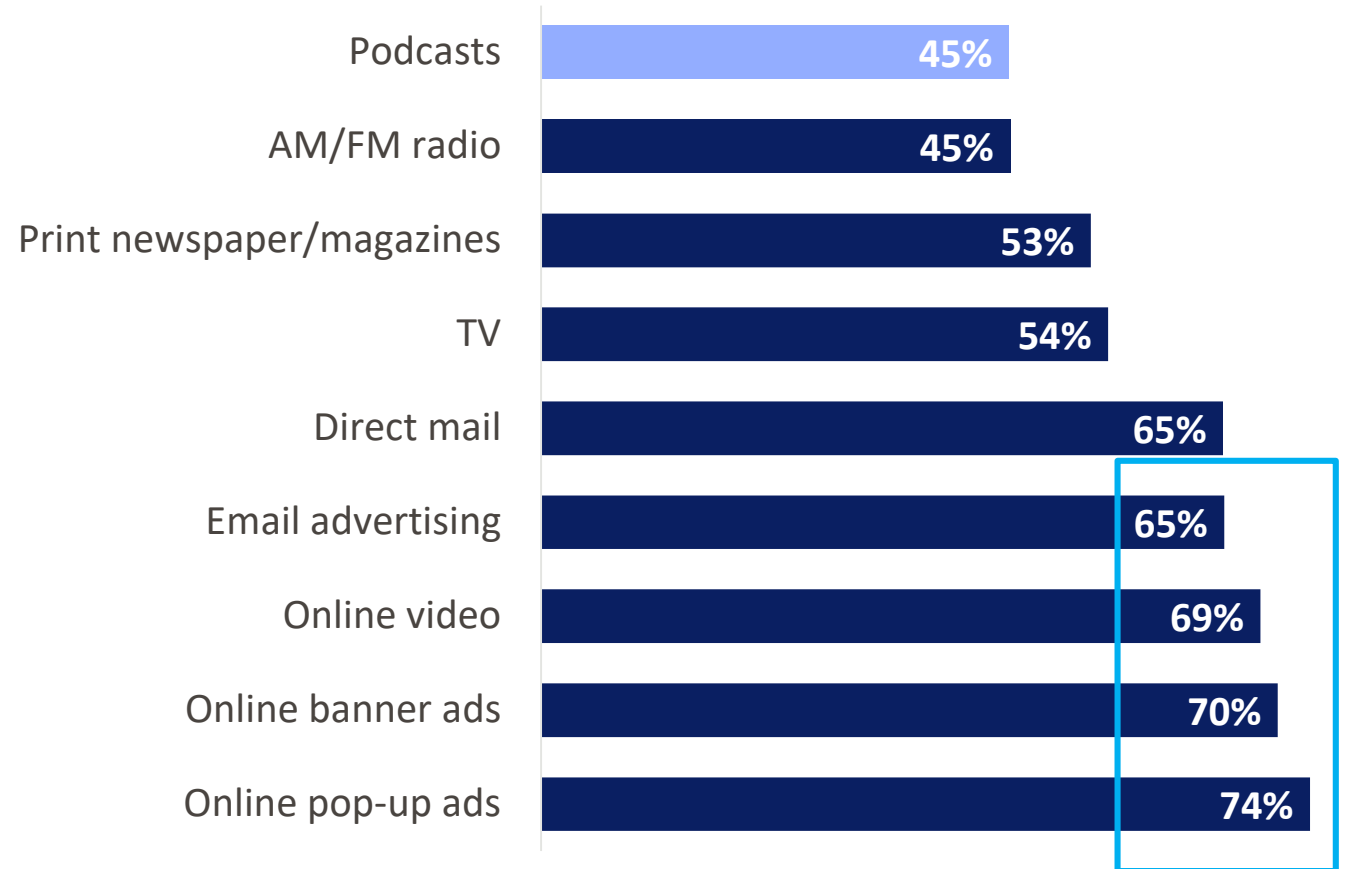
■ Programs you can also hear on AM/FM      ■ Programs not played on radio

# ADS ON PODCASTS AND AM/FM RADIO ARE LEAST LIKELY TO BE AVOIDED

MONTHLY PODCAST LISTENERS ARE MUCH LESS LIKELY TO SAY THEY AVOID ADS ON PODCASTS THAN ON OTHER DIGITAL MEDIA



Avoid ads most/ all of the time  
(Monthly podcast listeners)



Source: Canadian Podcast Listener 2018

[A4A] When you come across ads in each of the following places, how often do you actively avoid those ads by skipping, blocking, tuning out, turning away or otherwise avoiding the ad?

Base: Monthly podcast listeners age 18+ (n=1,534)



# SMART SPEAKERS



# NEARLY ONE-IN-FIVE CANADIAN ADULTS NOW HAVE A SMART SPEAKER



**ANY SMART SPEAKER**

January 2019	19%
Fall 2018	12%
June 2018	11%
Fall 2017	4%



**GOOGLE HOME**

January 2019	14%
--------------	-----



**AMAZON ECHO/ALEXA**

January 2019	6%
--------------	----



**APPLE HOMEPOD**

January 2019	2%
--------------	----

F17. Which of the following would best describe your experience with the Amazon Echo and Google Home Amazon Echo /"Alexa", Google Home and Apple HomePod "smart" speakers?  
 Base: Canadians 18+ (n=1,512), January 2019 / \*Canadians 18+, Radio on the Move, Fall 2018 (n=3,505), June 2018 (n=2,035), Fall 2017 (3,470)

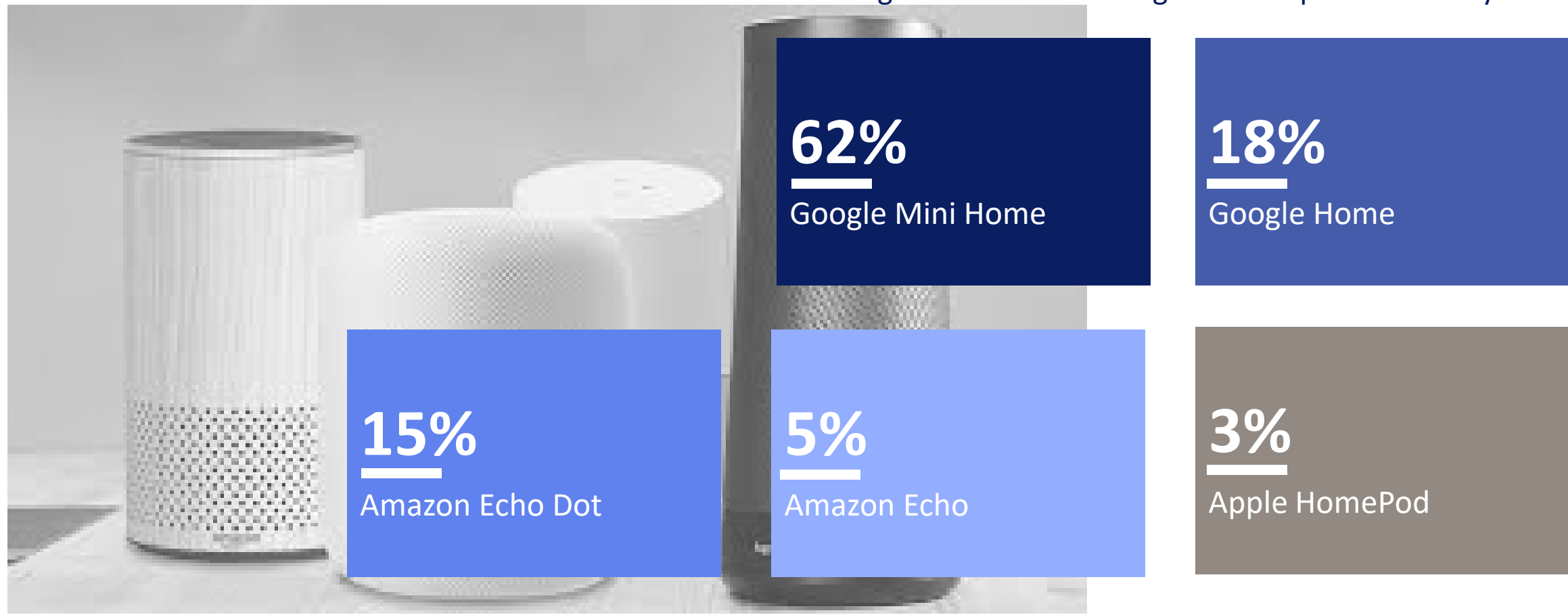




# COMPACT SPEAKERS TOPPED THE 2018 HOLIDAY GIFT LIST

BY A 3-TO-1 RATIO, CANADIANS RECEIVED FEATURE-PRICED COMPACT SPEAKERS OVER THEIR FULL-SIZED COUSINS; MEANWHILE, GOOGLE MAINTAINED THEIR DOMINANCE OVER AMAZON AND APPLE.

Among Canadians Receiving a Smart Speaker Holiday Gift

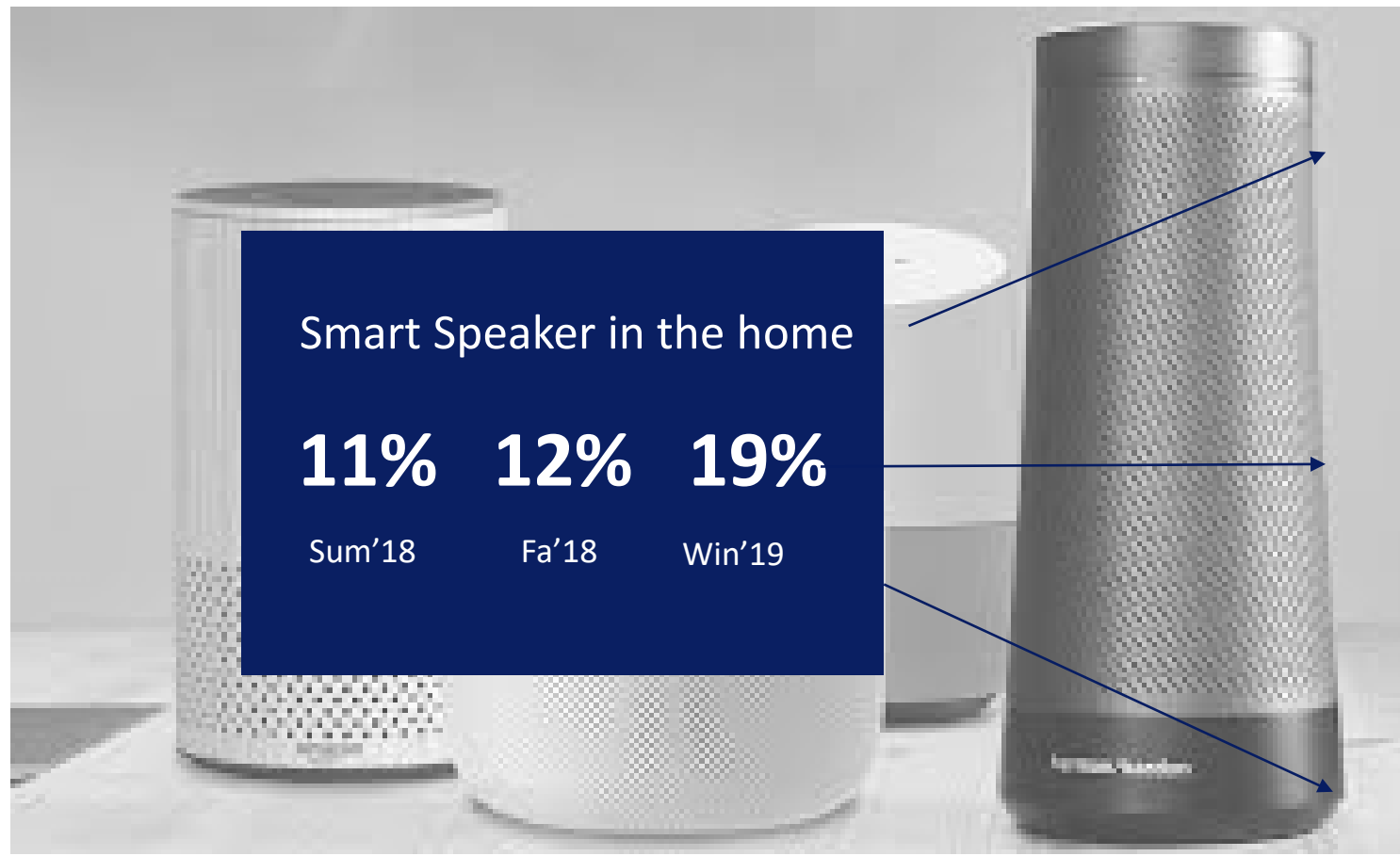


Q6. Which, if any, of the following did you receive as a gift over the holidays?  
Base: Canadians 18+ who received a smart speaker over the holidays (n=94), January 2019



# MORE HOUSEHOLDS NOW HAVE MULTIPLE UNITS

IN JANUARY 2019, MORE THAN 1/3 OF SMART SPEAKER HOUSEHOLDS HAD MULTIPLE SPEAKERS; 13% HAD 3+ SPEAKERS



Smart Speaker in the home

**11%**   **12%**   **19%**

Sum'18   Fa'18   Win'19

One smart speaker in the home

**70%**   **67%**   **63%**

Sum'18   Fa'18   Win'19

Two smart speakers in the home

**17%**   **22%**   **23%**

Sum'18   Fa'18   Win'19

Three+ smart speakers in the home

**13%**   **12%**   **13%**

Sum'18   Fa'18   Win'19

F20b. In what room(s) in your home do you currently have your smart speaker(s)?  
 F20a. In total, how many of these "smart" speakers do you have in your home?  
 Base: Canadians 18+ who own a smart speaker, Summer 2018 (n=213) / Fall 2018 (n=403) / Jan 2019 (n=288)



# LIVING OR FAMILY ROOM PRIME LOCATION FOR A SMART SPEAKER

SMART SPEAKER OWNERS WITH MULTIPLE UNITS OFTEN PLACE THEM IN THE BEDROOM OR KITCHEN



59%

Living or Family Room



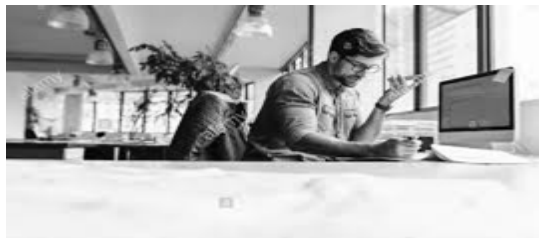
30%

Kitchen



29%

Bedroom



9%

Office



5%

Den



4%

Workshop



7%

Other

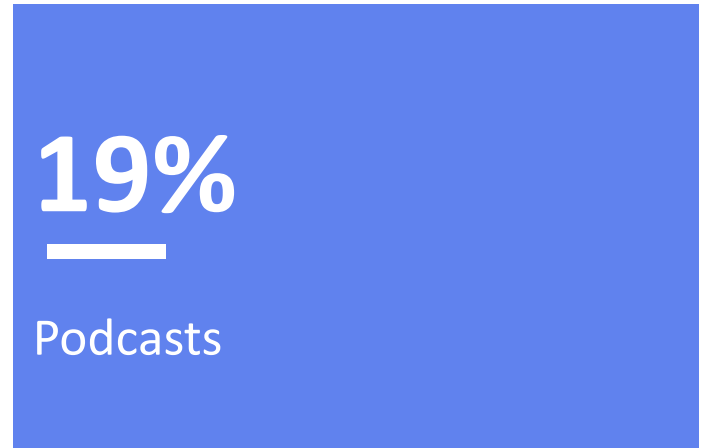
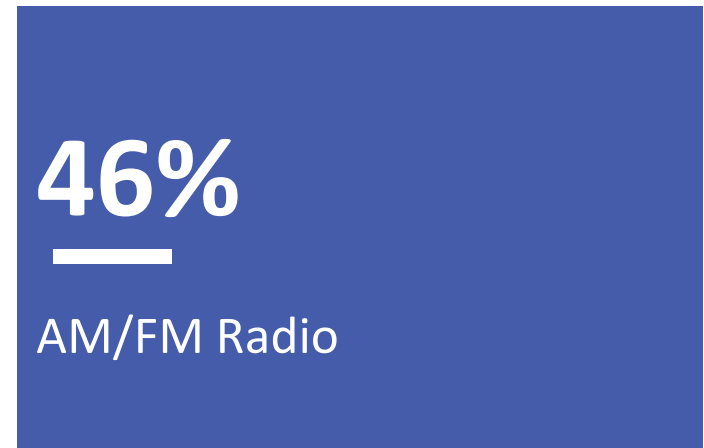
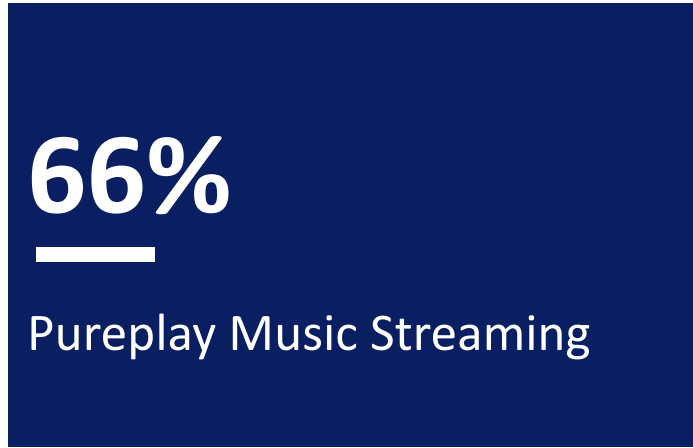


# SMART SPEAKERS BRING MORE AUDIO INTO THE HOME



MUSIC STREAMING AND AM/FM RADIO ARE WIDELY LISTENED TO BY SMART SPEAKER OWNERS

Listened in past week on smart speaker



Q5a. When was the most recent time, if ever, that you listened to the following types of audio ON YOUR SMART SPEAKER? A streaming music service (e.g., Spotify, Amazon Music Unlimited, Apple Music); AM/FM radio; podcasts  
Base: Canadians 18+ with a smart speaker in the home (n=288)

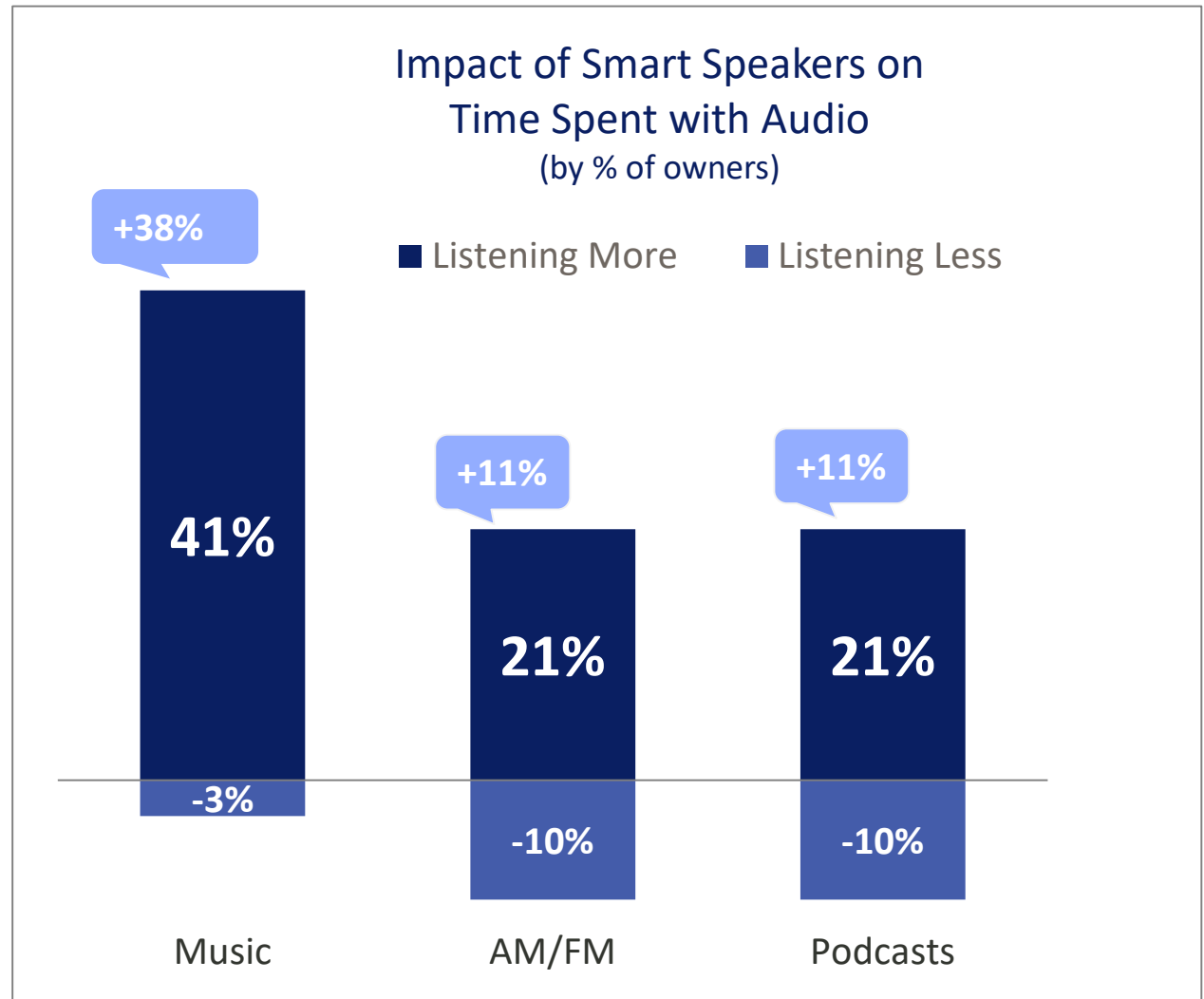


# SMART SPEAKERS CREATE NEW OPPORTUNITIES TO LISTEN TO AUDIO

**Net increase in listening to music: +38%**

**Net increase in listening to AM/FM: +11%**

**Net increase in podcast listening: +11%**



SOURCE: Radio on the Move W10 Q.F21. How would you say having a smart speaker at home has affected the amount of time you spend listening to each of the following?

\*non-listeners and those who did not report any changes not shown

Base: Canadians aged 18+ who own a smart speaker (n=375)



# MANY CANADIANS ARE STILL ON THE SIDELINES FOR SMART SPEAKERS



NEARLY 2/3s OF CANADIANS SURVEYED IN JANUARY 2019 SAID THEY ARE UNLIKELY TO BUY A SMART SPEAKER IN THE NEXT 6 MONTHS

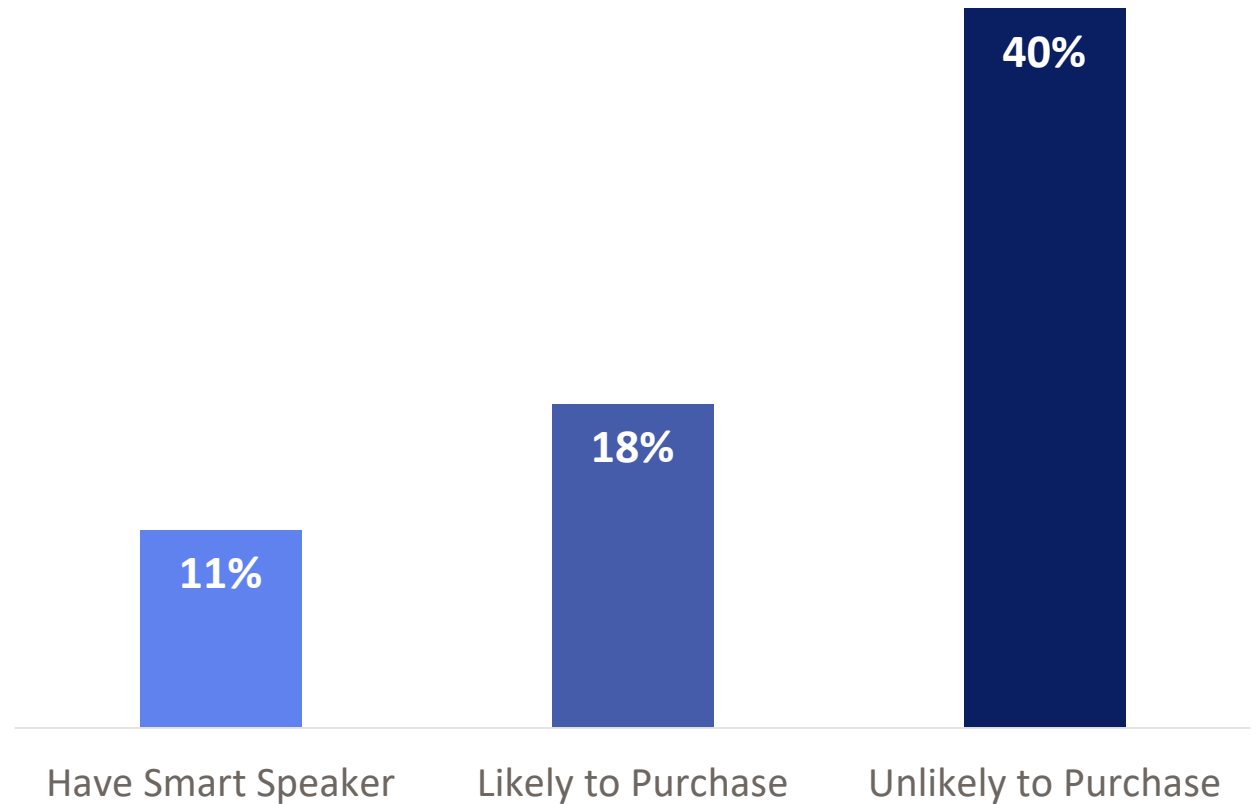


# PRIVACY CONCERNS REMAIN A BARRIER TO ADOPTION

“TO WHAT EXTENT, IF AT ALL, ARE YOU CONCERNED ABOUT YOUR PRIVACY BY HAVING A “SMART SPEAKER” IN YOUR HOME?”

“Very Concerned” about Privacy by Having a Smart Speaker in Home

Four-in-ten Canadians who are unlikely to buy a smart speaker in the next 6 months are very concerned about privacy if they had a smart speaker at home.





# RADIO CONNECTS

Radio reaches more Canadians than any other media. And it uniquely connects with listeners. With influential personalities and low ad avoidance, radio motivates action and drives to digital activity.

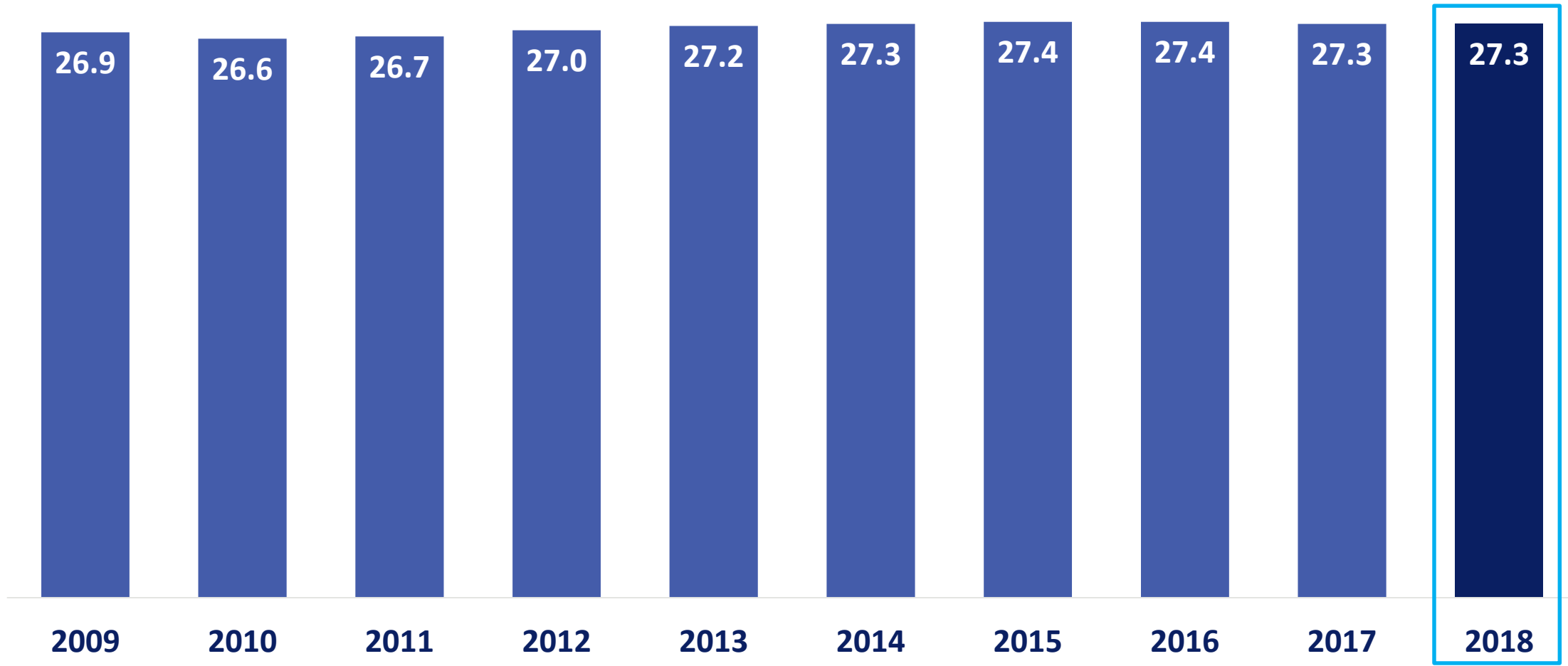




# RADIO REACHES CANADIANS

NUMERIS FALL DIARY RESULTS SHOW THAT RADIO REACHES 85% OF CANADIANS AGED 12+—MORE THAN 27 MILLION—PER WEEK

Millions of Canadians reached weekly (A12+)

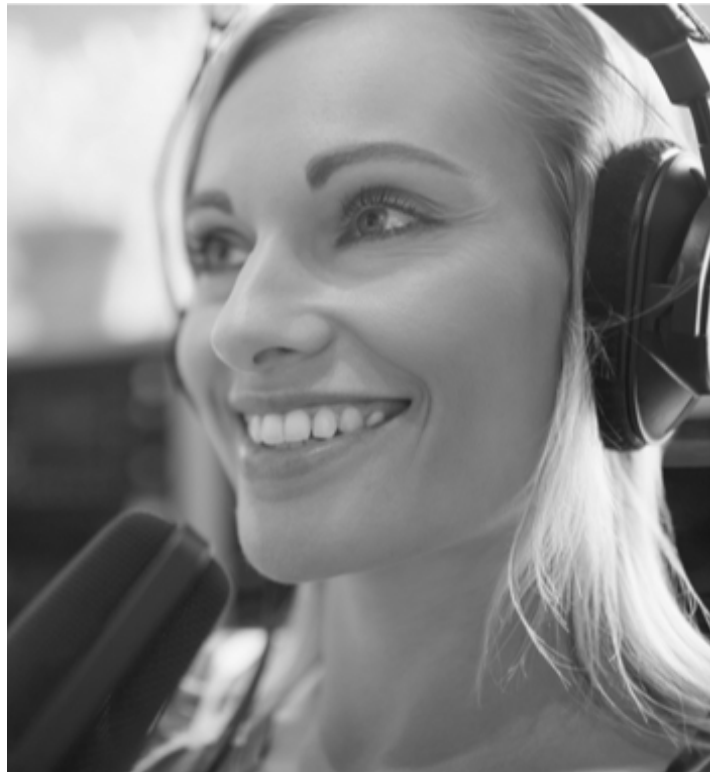




# RADIO CONNECTS LISTENERS TO THEIR FAVOURITE HOSTS

NEARLY 3-IN-10 CANADIAN RADIO LISTENERS (27%) SAY THEY HAVE A FAVOURITE RADIO HOST, DJ OR SHOW

Strongly + somewhat agree (among listeners with a favourite)



**93%**  
I trust their information and opinions

**91%**  
They make me laugh

**85%**  
They are part of my daily routine

**84%**  
They make me think

**74%**  
I'd follow them to another station

**65%**  
They feel like my friends/family

F16e\_2. Do you have a favourite DJ, host or show in AM/FM radio?  
F16E\_3. [Top2box summary] To what extent do you agree or disagree with each of the following statements about your favourite DJ, host or show?  
Base: Canadians 18+ who listen to radio in a typical weekday (n=3,133) / Have favourite DJ, host or show (n=864)



# IN-CAR RADIO LISTENING ACTIVATES PURCHASES

COMMERCIALS HEARD ON THE RADIO WHILE IN THE CAR INFLUENCE PURCHASE BEHAVIOURS



**33%**

Recall something they heard on the radio in the car affecting a purchase they were about to make, or a store/location about to be visited.



# NEARLY 1-IN-5 CANADIANS WENT ONLINE IN THE PAST MONTH TO GET MORE INFO ON SOMETHING THEY HEARD ON THE RADIO

HEARING ADS ON THE RADIO DRIVES SEARCH, PARTICULARLY AMONG THOSE WHO LISTEN TO DIGITAL AUDIO

**18%**

Canadians 18+

**17%**

Canadians 18-34

**26%**

HH Income \$100K+

**24%**

University + education

Past week listeners to digital audio are more likely than the average Canadian to have gone online to get more info on an ad they heard on AM/FM radio in the past month.

**132** Index

Stream pureplay music

**134** Index

Listen to podcasts

**171** Index

Stream AM/FM Radio

# IN SUMMARY

- ◆ Technology is giving Canadians more choice when it comes to audio listening. AM/FM dominates.
- ◆ AM/FM is the most listened to of all ad-supported audio platforms, during the week and on the weekends.
- ◆ Canadians are relatively late to the party when it comes to pureplay music streaming but it's now settling into the ever-expanding audio landscape.
- ◆ YouTube is the #1 source for music streaming, but 83% of Adults 18+ and 90% of A18-34 usually skip ads when streaming YouTube for music.
- ◆ Overall, listening to Spotify is growing but daily reach of ad-supported Spotify is actually declining; almost all of it duplicated on AM/FM.
- ◆ Podcast listeners is growing in Canada. This new platform gives Canadian broadcasters and advertisers unique opportunities to participate.
- ◆ Nearly 1-in-5 of Canadians now have a smart speaker, spurring more audio listening at home, including AM/FM.
- ◆ Radio connects. More than 27 million Canadians listen weekly.
- ◆ Radio drives purchase. One-in-three Canadians say hearing a radio ad in their car affected a purchase or store/location they were about to visit.
- ◆ Radio pushes to digital. Hearing ads on the radio leads to online search, particularly among those who also listen to digital audio.

---

# THANK YOU. QUESTIONS?

---

Please contact Radio Connects for a copy of today's presentation.



647-464-8695



[lisa.dillon@radioconnects.ca](mailto:lisa.dillon@radioconnects.ca) OR [caroline.gianias@radioconnects.ca](mailto:caroline.gianias@radioconnects.ca)



[Radioconnects.ca](http://Radioconnects.ca)



@ Radioconnects



Radio Connects