



# RADIO CONNECTS TO CONSUMERS 2019

# Wave 2 – An Expanded Study.

In field May – June 2019.



Year 2 of the study with expanded panel size and refreshed questionnaire designed to provide insights into consumer attention, engagement and path to purchase among English and French Canadians.



The honest truth about consumer attitudes to media, including the “trust factor” (or lack thereof), ad avoidance and attention paid to media channels.



An online panel of 6,000 Canadians 15+. Representative of the Canadian population conducted by Asking Canadians.

# Glossary of Terms.

Definition of terminology used in questionnaire.



## AM/FM Streaming

Any radio station transmitted online as a continuous flow; includes streaming / listening online via computer or mobile phone.



## Programmed Music

Use of RadioPlayer Canada, iHeart, TunedIn or local radio station mobile app to listen to music.



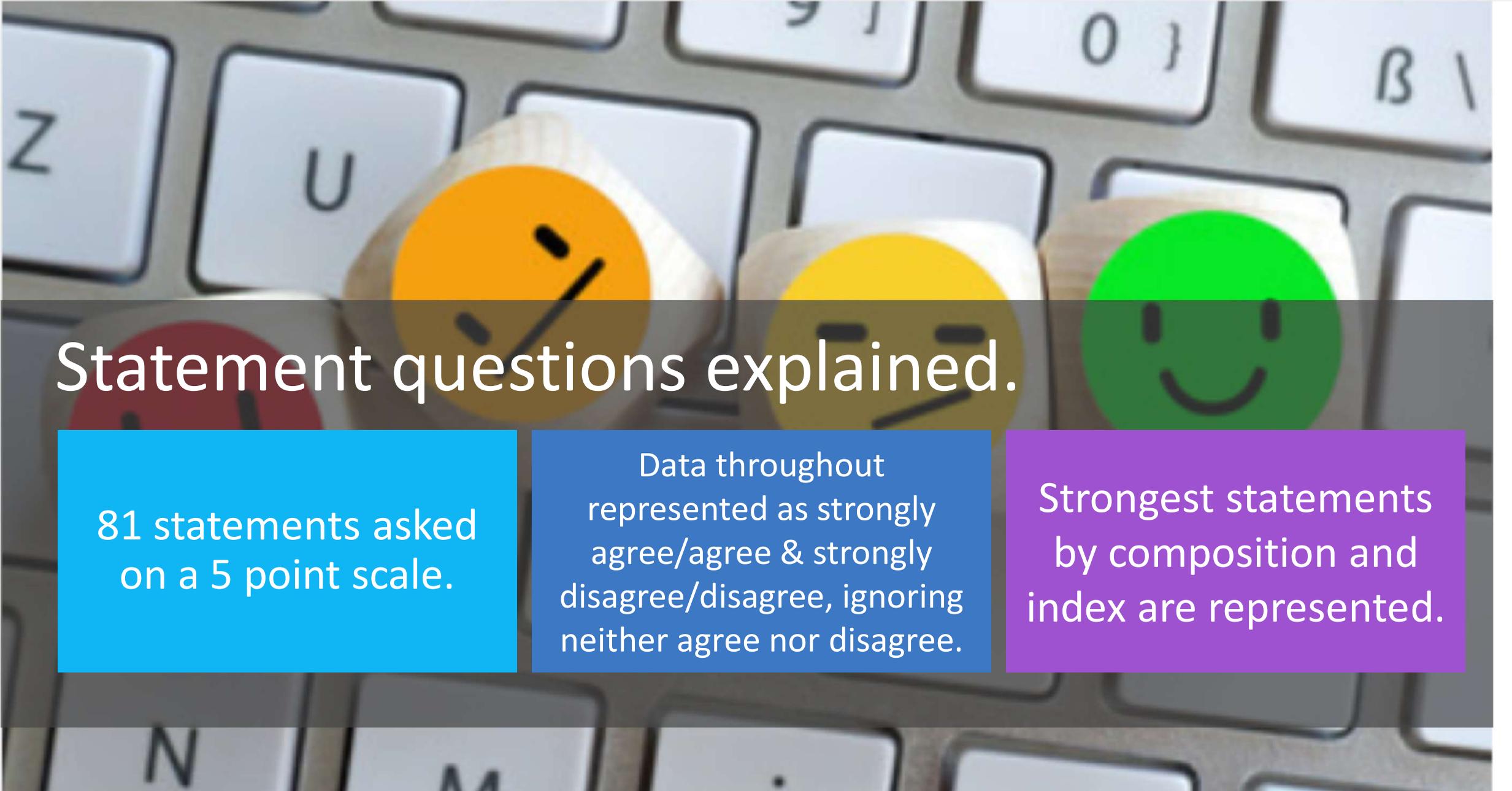
## Personal Music

Owned music and use of apps like: Spotify, Amazon Music, Apple Music, Google Music and curated music lists.



## Podcasts

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



# Statement questions explained.

81 statements asked  
on a 5 point scale.

Data throughout  
represented as strongly  
agree/agree & strongly  
disagree/disagree, ignoring  
neither agree nor disagree.

Strongest statements  
by composition and  
index are represented.

A close-up photograph of two hands, one from the left and one from the right, holding two white puzzle pieces. The puzzle pieces are interlocking, with one piece having a protrusion that fits into the hole of the other. The background is black, making the white puzzle pieces stand out. The hands are positioned as if they are about to connect the pieces.

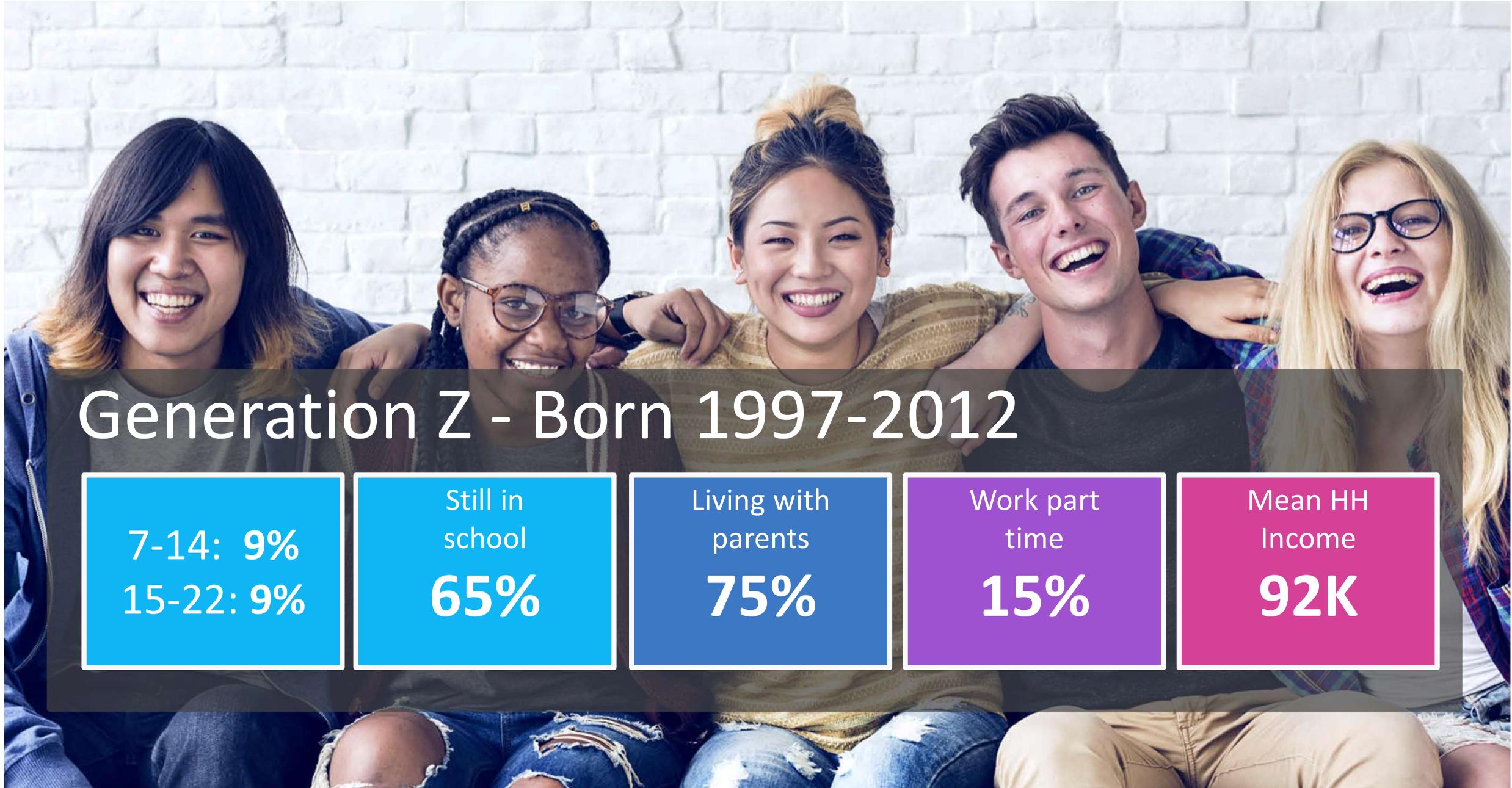
## Generations Connect Differently

Currency target groups do not adequately reflect how different generations behave or what motivates them to engage with media.

Understanding this behaviour empowers marketers to connect with their consumers with the right media, in the right tone, at the right time.



**GENERATION "Z"**  
**Born 1997-2012**  
**7-22 YRS OLD**  
**"Born Connected"**  
**18% of Total Canada**



# Generation Z - Born 1997-2012

7-14: 9%  
15-22: 9%

Still in school  
**65%**

Living with parents  
**75%**

Work part time  
**15%**

Mean HH Income  
**92K**



# GENERATION “Y” - Born 1981-1996

They're not 18-34 year old's.

23-29  
(9%)



Maturing Millennials 1990 – 1996

Urban (51%) HHI 89K | PI 53K

University  
**44%**  
(136i)

Masters  
**13%**  
(93i)

Live with partner  
**43%**  
**21%**  
with parents

Work full time  
**74%**  
(138i)

No \$ for non-essentials  
**32%**  
(110i)

30-38  
(12%)



Milestone Millennials 1981-1989

Urban (53%) HH 102K | PI 68K

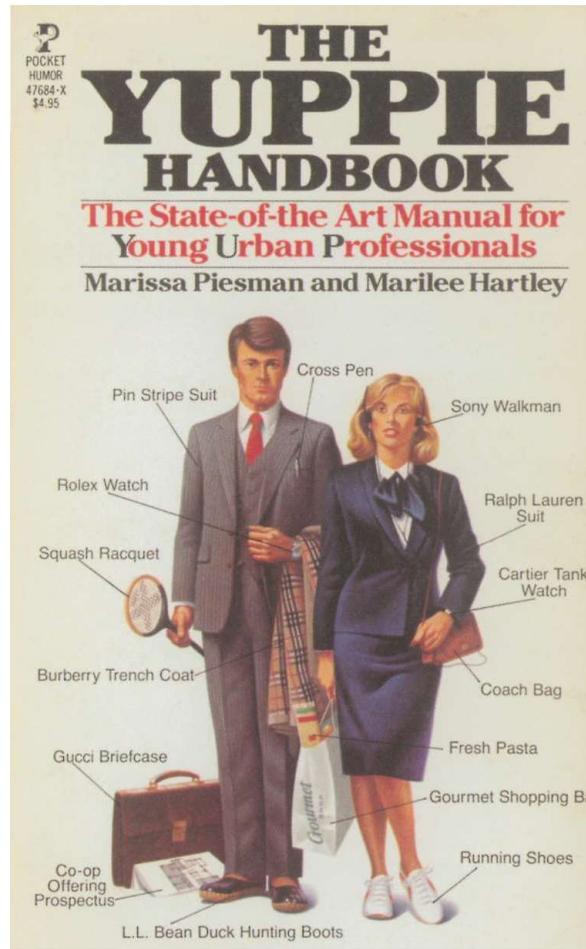
College  
**22%**  
(104i)

University  
**40%**  
(121i)

Masters  
**17%**  
(123i)

Child<5yrs  
**19%**  
(154i)

No \$ for non-essentials  
**26%**  
(89i)



**GENERATION "X"**  
**Born 1965 – 1980**  
**39-54 YEARS OLD**  
**"Boom Bust"**  
**"Sandwich**  
**Generation"**  
**22% of Total Canada**

# GENERATION “X” - Born 1965 – 1980

An analogue childhood to a digital adulthood

39 – 47  
(12%)



Advancing Gen X 1972-1980

48 – 54  
(10%)



Established Gen X 1965-1971

Mean HH  
Income  
**106K**

Mean Pers.  
Income  
**71K**

Col./Univ.  
**61%**  
(114i)

Tweens or  
Teens  
**34%**

Have Kids  
6-15  
**30%**

Mean HH  
Income  
**112K**

Mean Pers.  
Income  
**75K**

Col./Univ.  
**61%**  
(114i)

Tweens or  
Teens  
**35%**

Adult kids at  
home  
**26%**



**BABY BOOMERS**  
**Born 1946-1964**  
**55-73 YEARS OLD**  
**“The Woodstock**  
**Generation”**  
**23% of Total Canada**

# BABY BOOMERS - Born 1946-1964

The generation that broke the mold.

55-65  
(15%)



Freedom 55+ 1954-1964

Mean HH  
Income  
**98K**

Mean Pers.  
Income  
**79K**

Work P.T.  
**11%**  
(102i)

Retired  
**39%**

Adults kids at  
home  
**14%**  
(152i)

66-73  
(8%)



OAS Boomers 1946-1953

Mean HH  
Income  
**66K**

Mean Pers.  
Income  
**53K**

Work P.T.  
**9%**  
(102i)

Retired  
**83%**

Live alone  
**25%**  
(124i)

# Canadians Across Generations Are Connected To Audio



Do media behaviours and attitudes remain the same as Canadians age?  
Or do they change as people progress through life stages and evolving household dynamics?

The following compares and contrasts how the different generations respond to media and advertising.

# Canadians remain connected to audio.

## Key Findings:

- Tuning to audio year over year has been consistent.
- Canadians 15+ say their listening to AM/FM radio and personal music has remained steady in the past 12 months.

Canadians 15+

82%

Tuning to audio year over year has been consistent

83%

Listen in AM/FM past week

46%

Listened to Personal Music yesterday

23%

Listened to a Podcast in the past week

# Younger Canadians chose AM/FM over social media in the past 12 months.

## Key Findings:

- More Canadians 15+ have connected with AM/FM in past 12 months than with Social Media.
- **89%** of Canadians tuned to AM/FM vs. **80%** on Social Media (Facebook, Instagram, Twitter, Snapchat).
- Only **18% Gen Z** and **13% of Milestone Millennials** say they didn't listen to AM/FM radio in the past 12 months.

**22%**

Gen Z didn't use Facebook in past 12 months

**38%**

Mile. Mill. didn't use Snapchat in past 12 months

**37%**

Mat. Mill. didn't use Instagram in past 12 months

**59%**

Mile. Mill. didn't use Twitter in past 12 months

# Canadian consumers connect with radio for specific reasons.

## Key Findings:

- AM/FM radio keeps Canadians connected to their communities and what's happening locally.

Canadians 15+

**73%**

AM/FM keeps me up to date with latest news

**70%**

Keeps me up in touch with what's happening locally

**61%**

Connects me to my community

**44%**

Listen for traffic and weather

# Each generation connects for its own reasons.

## Key Findings:

- Top reason why **Gen Z's** listen to radio is because it helps them keep up with the latest news **57%**.
- Keeping them in touch locally is the main reason for **Maturing Millennials** **67%** (96i).
- **2/3's** of **Established Gen X** feel radio keeps them connected to their community.
- Boomers feel radio keeps them in touch with what's happening locally **76%** (109i).

Canadians 15+

**29%**

Wake up to AM/FM radio

**64%**

Always listen on their commute

**58%**

Always listen for traffic and weather

**20%**

Stream AM/FM while at work

# Radio is digital and Canadians are enjoying it across multiple platforms.

## Key Findings:

- Over the air and in car are the most widely used platforms, but radio is digital and people are connecting across different devices.
- Each generation connects in a way that suits them most.

Canadians 15+

**83%**

Listened to AM/FM in car/over the air on a 'radio'

**42%**

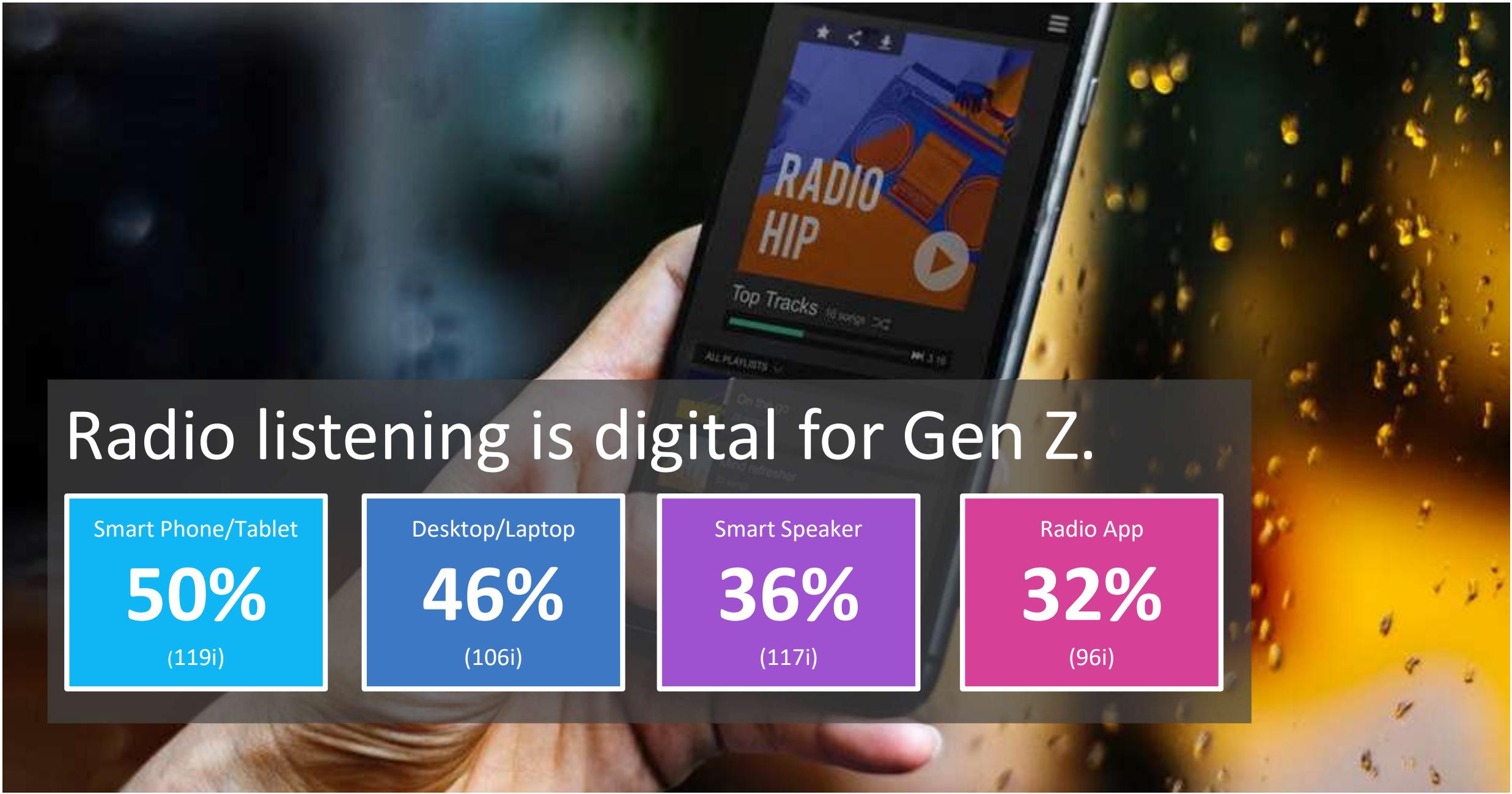
Listened on a mobile device

**44%**

Listened on a desktop or laptop computer

**31%**

Listened over a Smart Speaker



# Radio listening is digital for Gen Z.

Smart Phone/Tablet

**50%**

(119i)

Desktop/Laptop

**46%**

(106i)

Smart Speaker

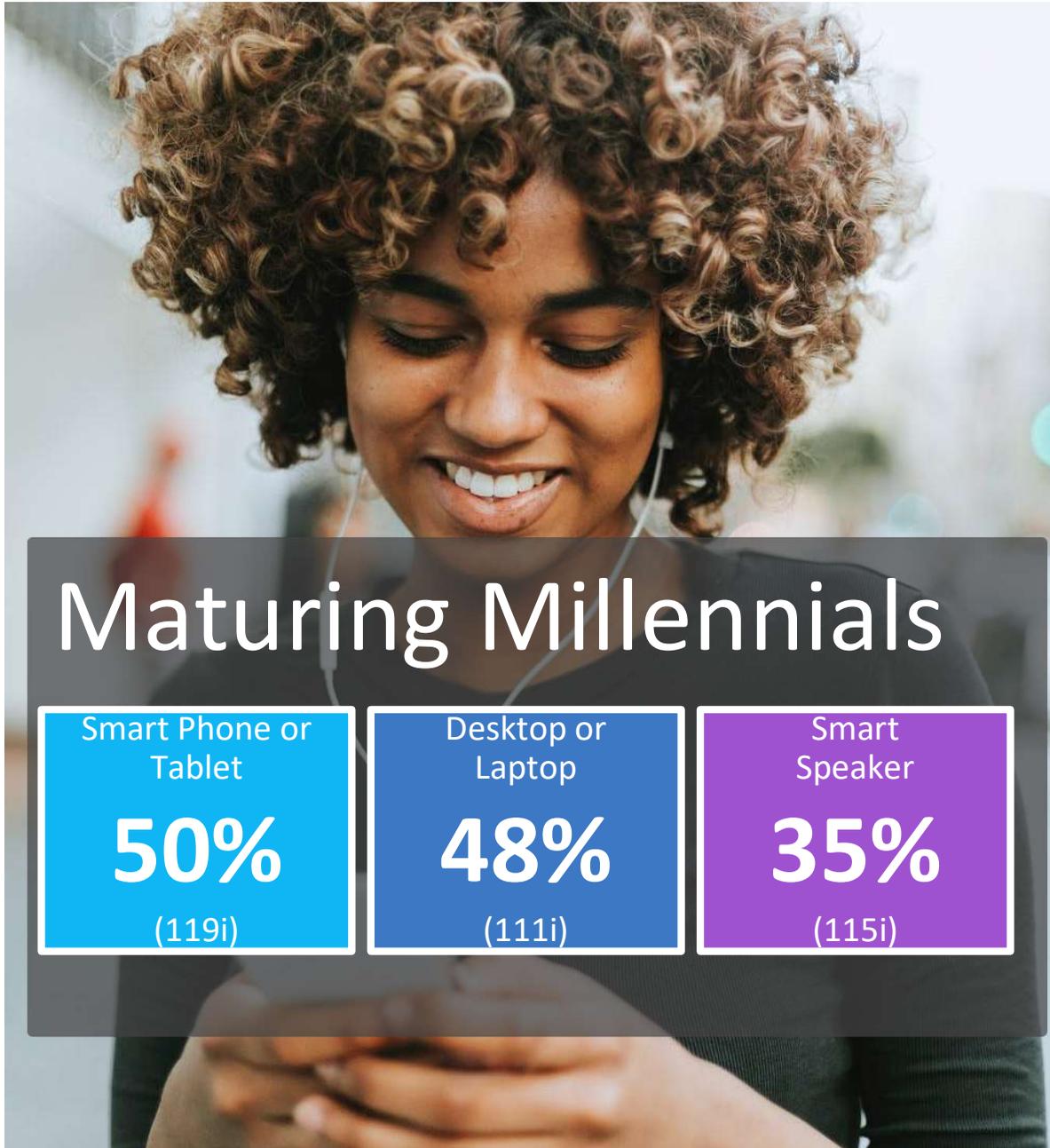
**36%**

(117i)

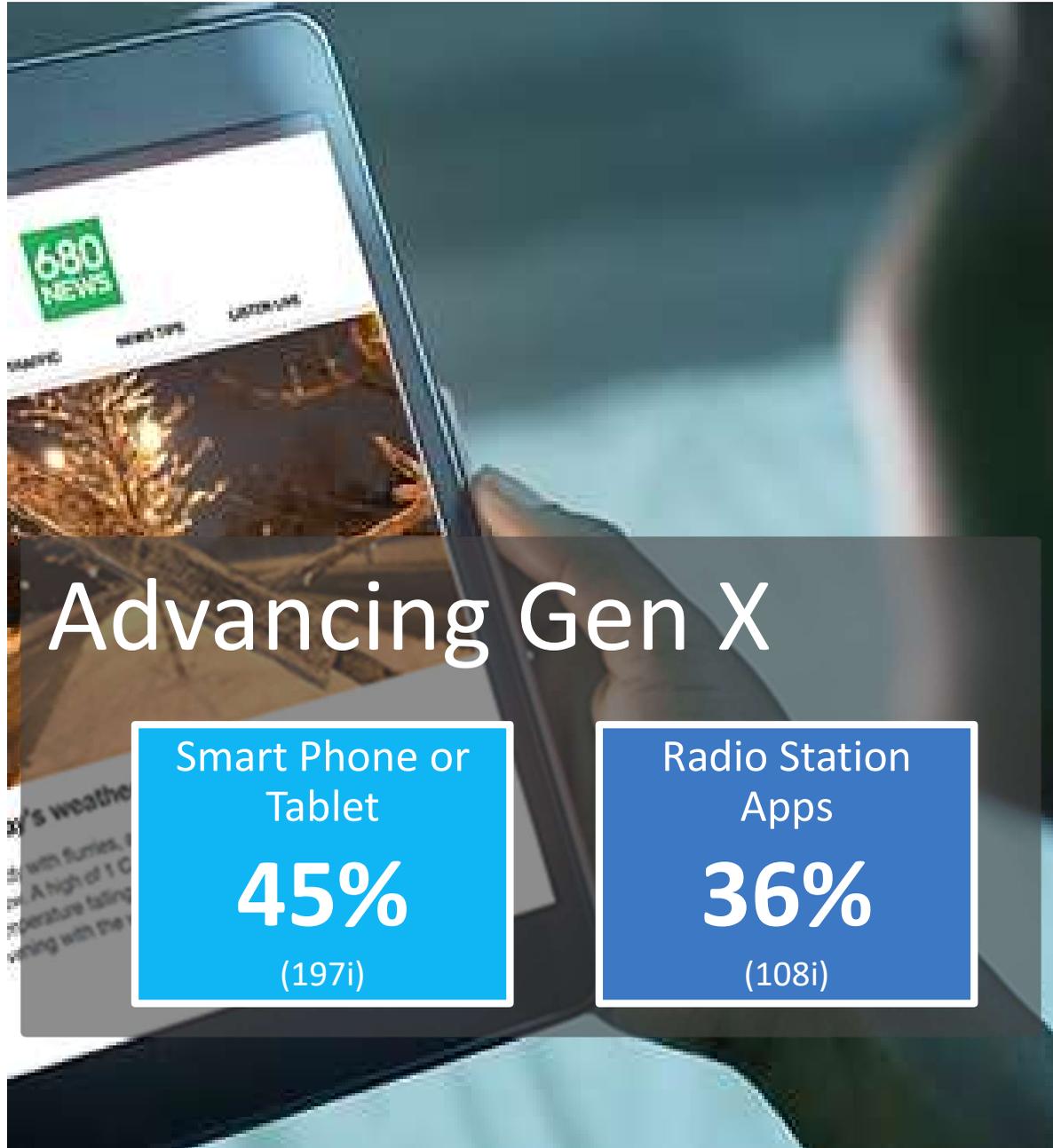
Radio App

**32%**

(96i)



Q20. Which of the following digital services do you use to listen to audio content?



Q20. Which of the following digital services do you use to listen to audio content?

# Radio is where Canadians discover new music.

## Key Findings:

- AM/FM radio's music directors are the real curators of new music.
- Most Canadians discover new music on AM/FM radio.

Canadians 15+

**59%**

Discover new music through AM/FM radio

**39%**

Discover new music through family and friends

**34%**

Discover new music on YouTube

**20%**

Discover new music via Social Media or Spotify

# Personal music is about disconnecting.

Particularly amongst young Canadians.

## Key Findings:

- Creating their playlists is an important reason to connect with personal music for younger and older Canadians.
- **Freedom 55+**: Personal music matches their mood **55%** (103i)
- As **Millennials** age and become busier, customization of personal music becomes boring: **Millennials 25%** (113i), **Advancing Gen X 24%**(110i)

Canadians 15+

**56%**

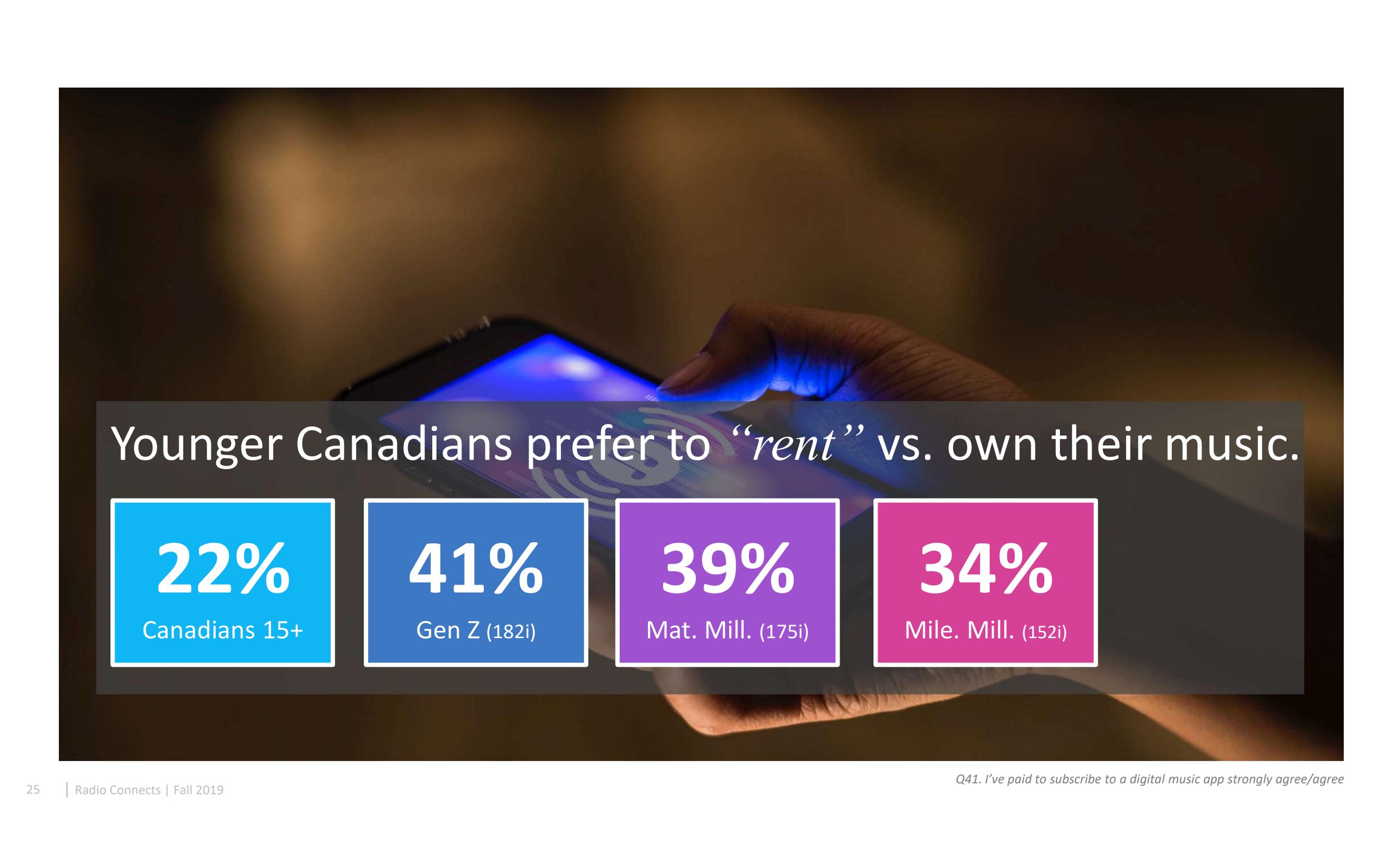
It's commercial free

**53%**

Like it match their moods

**46%**

Can access it anywhere



# Younger Canadians prefer to “rent” vs. own their music.

**22%**

Canadians 15+

**41%**

Gen Z (182i)

**39%**

Mat. Mill. (175i)

**34%**

Mile. Mill. (152i)

# Radio Engages With Canadian Consumers



When it comes to media exposure, to be engaged is to be attentive. The more engaged and attentive a consumer is to an advertiser's message, the more likely the message will connect with them.

Engagement = Interesting or Enjoyable.  
An engaged audience is more open to an advertiser's message.

*Canadians 15+*

**Television**  
**85%**

**Internet**  
**84%**

**AM/FM**  
**79%**

**Personal Music**  
**79%**

**Social Media**  
**61%**

**Mobile Apps**  
**58%**



# When are Canadians paying attention?

Canadians 15+

Using the  
Internet

82%

Watching  
Television

78%

Listening to  
Radio

64%

Using Social  
Media

54%

# Interest and attention changes with age.

Younger generations pay most attention to digital platforms.

Millennials' attention to Mobile changes significantly vs. their younger siblings.

As Milestone Millennials become Advancing Gen X, attention paid to radio increases.

Attention paid to digital platforms decreases from Freedom 55+ to OAS Boomers.

Generation Z:  
Internet: **82%** (100i)  
Mobile Apps: **75%** (138i)  
Social Media: **73%** (134i)

Mobile Apps: Gen Z **75%** (138i) | Millennials **65%** (120i)  
Social Media : Gen Z **73%** (134i) | Millennials **62%** (114i)

Radio: Milestone Millennials **52%** (81i) | Advancing Gen X **63%** (98i) | Established Gen X **69%** (107i)

Social Media: Freedom 55+ **52%** | OAS **43%**  
Mobile Apps: Freedom 55+ **48%** | OAS **35%**

# Truth in advertising.

## Key Findings:

- Youngest generation is more likely to wish advertising is more entertaining than factual. Entertaining **51%** (100i), Factual **49%** (82i).
- Influencer marketing has lost some clout with **Millennials**. They've experienced a decline in agreeing to the statement "*they will change their mind about a product if they read/see/hear something positive about it*" - **Maturing Millennials 47%** (-20% vs. YA) | **Milestone Millennials 45%** (-22% vs. YA).

Canadians 15+

**60%**

Like Factual Advertising

**51%**

Expect Ads To Be Entertaining

**45%**

Advertising helps me know what's available

**45%**

Positive info can change my mind

# Ad avoidance is real.

## Key Findings:

- Canadians are more likely to avoid digital vs. mass media ads.
- Digital video and audio ads are challenged to create engagement with consumers of all ages.
- **46%** of Canadians use some form of ad blocking technology to avoid advertising messages on digital platforms.

Canadians 15+

**31%**

More likely to close an auto play web pg. vs. change radio station when an ad comes on

**23%**

More likely to use 5 sec skip feature vs. watching TV on PVR to avoid commercial

**14%**

More likely to mute social media ad vs. mute the tv when commercial comes on

# Digital ads are the most avoided content.

## Key Findings:

- Canadians 15+ avoid digital video ads when they can.
- Youngest Canadians more likely than older Canadians to avoid digital ads on social media.
- **Gen Z** hide ads on social media sites **76%** (112i) | **All Millennials** **78%** (116i).

Canadians 15+

**85%**

Use skip add feature on video ads when available

**81%**

Close web page completely if there is an auto play video ad

**68%**

Hide sponsored ads on social media sites

**65%**

Block or mute companies who advertise on social media sites

# Digital incognito.

Canadians are feeling tracked online.

Key Findings:

- As more Canadians cloak themselves, the more challenging it is to deliver relevant ads.
- **Gen Z** are less concerned at this stage of their lives about online footprint. They are not likely to click a do not track on Social Media (91i).
- **Maturing and Milestone Millennials** have taken steps to remove their digital footprint **40%** (114i).

Canadians 15+

61%

Tracked online because of conversations

68%

Tracked online because of stores visited

71%

Would click do not track if available on social media

71%

Tracked for items researched or purchased

# Canadians have to think twice about whether ads on Social Media are relevant.

## Key Findings:

- **46%** of Canadians feel ads received on Social Media are not relevant to their interests.
- **51% Maturing** and **46% Milestone Millennials** are 'meh' about Social Media ads.

Canadians 15+

**19%**

*Agree* Social Media ads **ARE** relevant

**39%**

*Disagree* Social Media ads **ARE** relevant

**46%**

*Agree* Social Media ads are **NOT** relevant

**10%**

*Disagree* Social Media ads are **NOT** relevant

# Gen Z

Social Media ads **ARE** relevant...

27%

Agree

28%

Disagree

Social Media ads **NOT** relevant...

41%

Agree

14%

Disagree

Q39. Please indicate how much you agree or disagree with the following statements. | Q41. Your answers to the following statements will help us understand the opinions of different types of people.

## Maturing Millennials

Social Media ads **ARE** relevant...

30%

Agree

20%

Disagree

Social Media ads **NOT** relevant...

36%

Agree

18%

Disagree

## Milestone Millennials

Social Media ads **ARE** relevant...

29%

Agree

25%

Disagree

Social Media ads **NOT** relevant...

42%

Agree

15%

Disagree



# Consumers are less likely to buy from a company that...

Canadians 15+

**58%**

Makes me feel like my  
online behaviour is being  
watched

**42%**

Serves me ads that feel  
too personal

**42%**

Serves me online ads from  
places where I've been

# Finding the right moment and tone to talk.

*Canadians 15+*

## To Be Entertained

Audio 68%

TV 66%

Internet 39%

## To Lift My Mood

Audio 61%

TV 31%

Internet 17%

## Keep Up With New & Gossip

Audio 53%

TV 44%

Internet 43%

## To Pass The Time

Audio 58%

TV 54%

Internet 41%

## Something To Talk About

Audio 35%

TV 31%

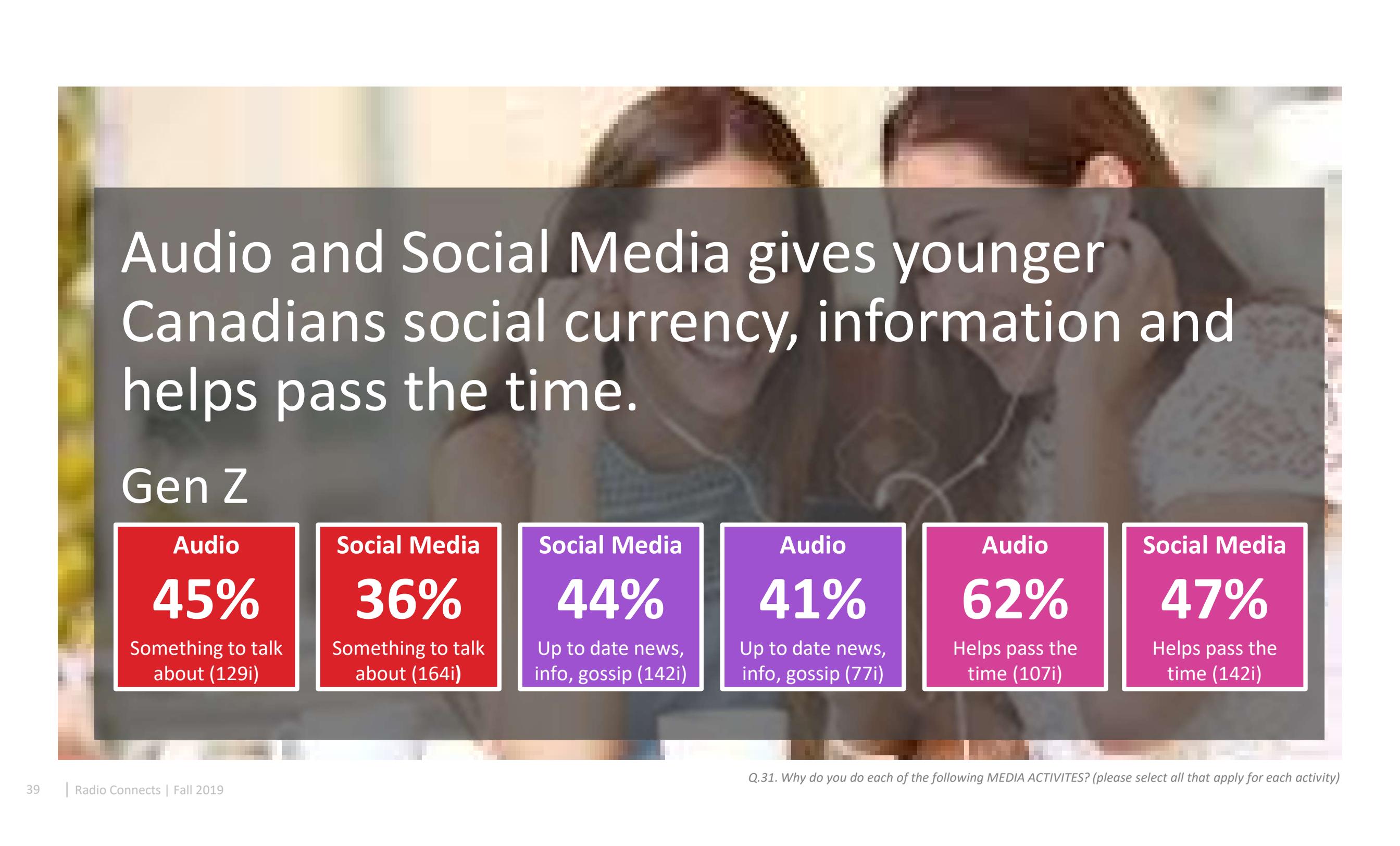
Internet 28%

## To Check Prices

Internet 63%

Mobile 25%

Audio 9%



Audio and Social Media gives younger Canadians social currency, information and helps pass the time.

## Gen Z

Audio

**45%**

Something to talk about (129i)

Social Media

**36%**

Something to talk about (164i)

Social Media

**44%**

Up to date news, info, gossip (142i)

Audio

**41%**

Up to date news, info, gossip (77i)

Audio

**62%**

Helps pass the time (107i)

Social Media

**47%**

Helps pass the time (142i)

## Maturing Millennials

Audio

40%

Something to talk about  
(114i)

Social Media

30%

Something to talk about  
(136i)

Audio

48%

Up to date news, info,  
gossip (91i)

Social Media

44%

Up to date news, info,  
gossip (142i)

Audio

63%

Helps pass the time (108i)

Social Media

51%

Helps pass the time (155i)

## Milestone Millennials

Audio

37%

Something to talk about  
(106i)

Social Media

22%

Something to talk about  
(127i)

Social Media

42%

Up to date news, info,  
gossip (90i)

Audio

39%

Up to date news, info,  
gossip (126i)

Audio

61%

Helps pass the time (102i)

Social Media

42%

Helps pass the time (127i)

# Radio sets the mood.

## Maturing Millennials **41%**

(104i)

use radio to *pass the time* and **Milestone Millennials** say radio helps them *connect with others* **11%** (104i)

## Advancing Gen X

Likes radio to *help pass time* **39%** (101i) and to *have to me time* **23%** (105i).

**Established Gen X** listens to *help escape life's pressures* **27%** (113i)

## Radio keeps **Freedom 55+**

*up to date with news and gossip* **58%** (121i) and to *learn new things* **38%** (118i). Radio helps OAS Boomers *relax and unwind* **42%** (120i)



# The Upside of Social Media

Canadians 15+

Amused

**78%**

Inspired

**64%**

Connected

**63%**

# The Downside of Social Media

Canadians 15+

Angry

62%

Cynical

60%

Lonely  
Gen Z

40%

(142i)

Lonely  
Mat.Mill.

45%

(160i)

Lonely  
Mile.Mill.

40%

(145i)

Depressed

38%

Lonely

28%

Depressed  
Gen Z

44%

(116i)

Depressed  
Mat.Mill.

52%

(139i)

Depressed  
Mile.Mill.

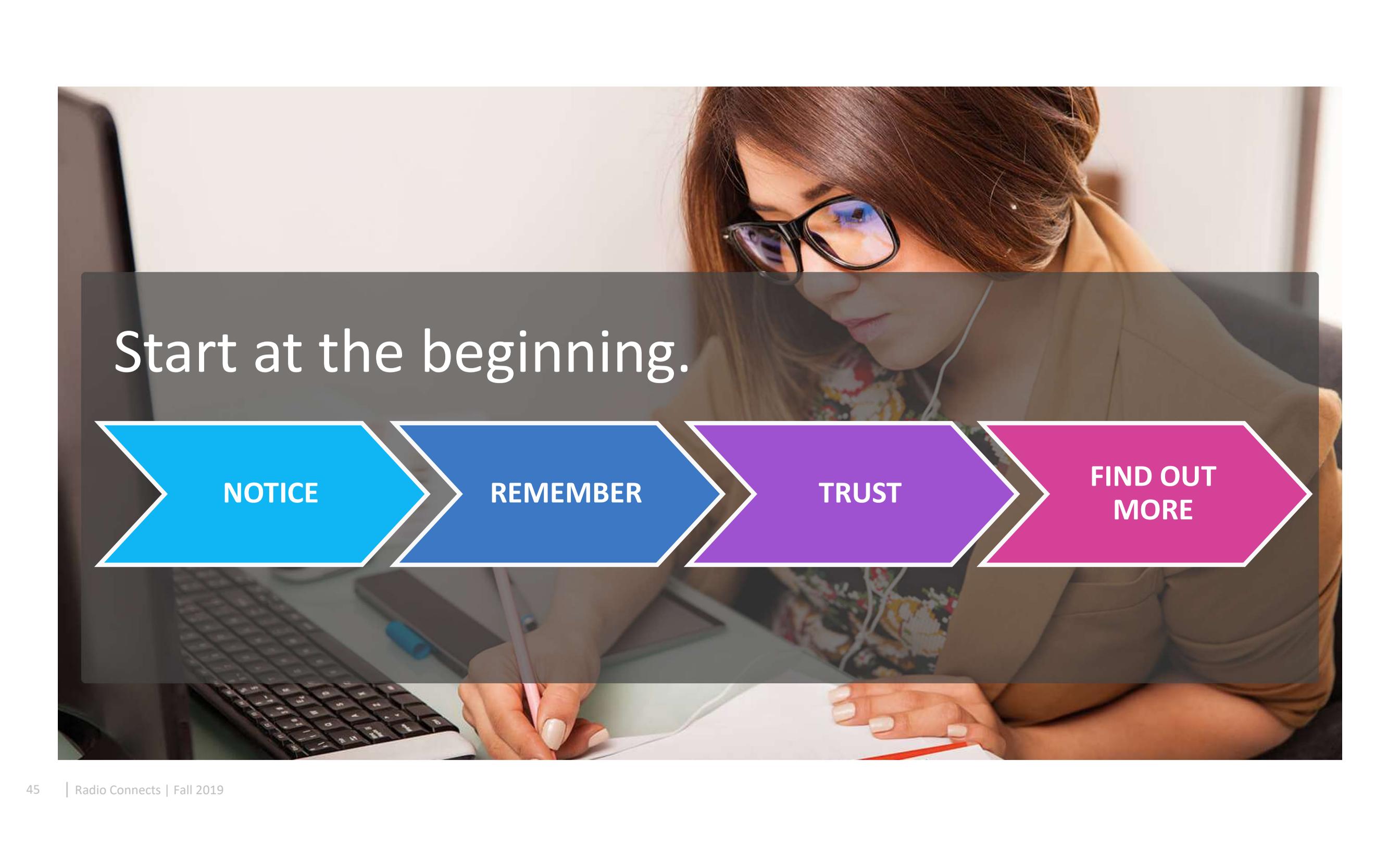
47%

(126i)



# Attribution

When it comes to reaching today's shoppers, AM/FM radio connects, but doesn't usually get the credit. In the path to purchase funnel, focus is on transaction not awareness.



Start at the beginning.

NOTICE

REMEMBER

TRUST

FIND OUT  
MORE

ABC

# People absorb information differently.

Canadians 15+

44%

Something I've read

38%

Something I've watched

18%

Something I've heard

# Younger Canadians are audible learners.

Gen Z

**28%**

(157i)

All Millennials

**22%**

(122i)

Gen X

**20%**

(112i)

Gen Z

**48%** (112i)

Hearing a brand name helps me remember it

All Millennials

**51%** (109i)

Remember radio jingle ads



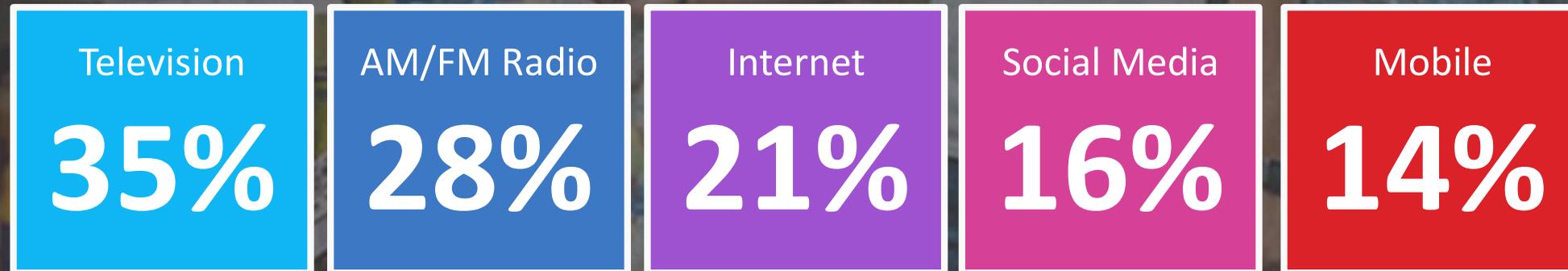
Internet gets the credit but it isn't the primary driver of awareness and recall.

Canadians 15+



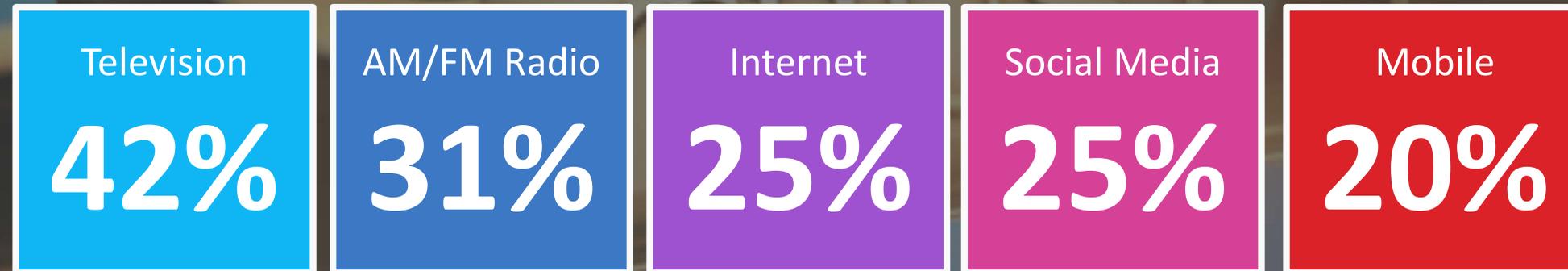
# Ads are REMEMBERED on mass media.

Canadians 15+



# Mass media confers trust for brands.

Canadians 15+



# Ads can't just be noticed, they have to be remembered. Across all generations, TV and Radio drive recall.

**Younger Canadians** are the only ones most likely to *notice ads on Social Media*. Across all other generations Social Media ranks 6<sup>th</sup> for noticing ads.

Amongst **Gen X**, *Television and radio* drive awareness and recall.

**Boomer Canadians** *trust digital platforms the least* and have highest awareness and recall with mass media.

*Notice Social Media*  
 Gen Z **32%** (128i)  
 Millennials **30%** (124i)  
 Gen X **24%** (96i)  
 Boomers **21%** (87i)

*Awareness of product of advertiser*  
 TV **40%** (95i) | Radio **27%** (103i)  
 | Social Media **24%** (96i)  
*Recall*  
 TV **35%** (100i) | Radio **31%** (109i)  
*Trust*  
 TV **39%** (107i) | Radio **35%** (117i) |  
 Internet **26%** (103i) | Social Media **15%** (91i)

*Trust name or product of advertiser*  
 TV **51%** (120i) | Radio **29%** (102i)  
*Recall*  
 Internet **22%** (87i) | Social Media **11%** (55i)  
*Awareness*  
 TV **51%** (120i) | Radio **27%** (104i)

Q 44. Of those who trust advertising (base is all those who chose other than 'none of the above' - Every day, you see and hear advertising on various media channels. Thinking about advertising you might hear or see for a NEW or previously UNKNOWN to you product/service/retailer – which of the following media channels does the best job of getting you to trust the ad?



# Radio Connects With Generations of Shoppers

Canadians across generations have different motivations and methods for shopping. Radio connects with them all.



# All Canadians agree.

Canadians 15+

Hard to make  
decisions with  
too many choice

**38%**

Private Label  
brands are just  
as good

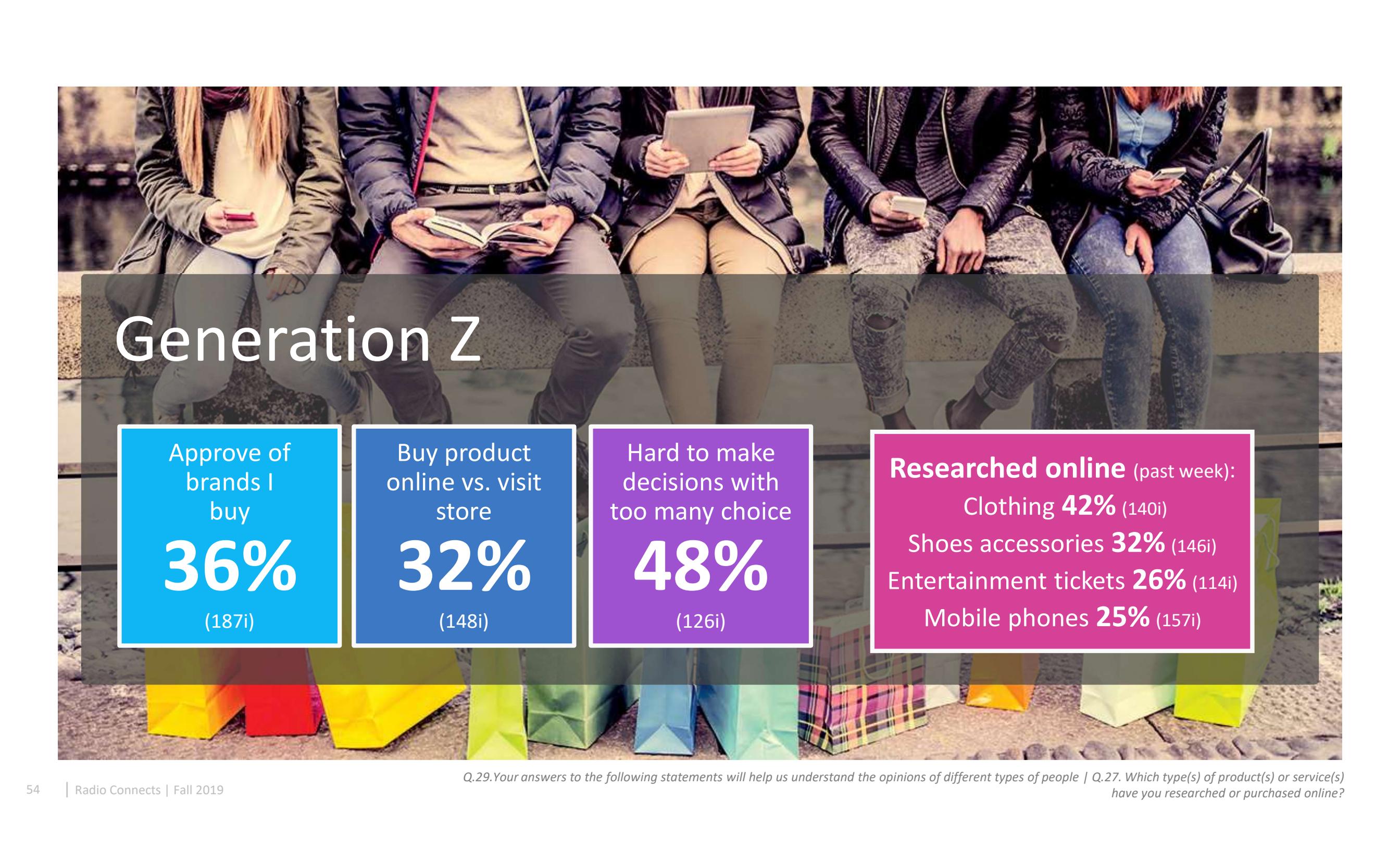
**48%**

Enjoy  
browsing in  
store

**49%**

Like being  
rewarded by  
brands

**73%**



# Generation Z

Approve of  
brands I  
buy

**36%**

(187i)

Buy product  
online vs. visit  
store

**32%**

(148i)

Hard to make  
decisions with  
too many choice

**48%**

(126i)

**Researched online** (past week):

Clothing **42%** (140i)

Shoes accessories **32%** (146i)

Entertainment tickets **26%** (114i)

Mobile phones **25%** (157i)

## Maturing Millennials

Approve of the brands I buy

**32%**

(163i)

Hard to make decisions with too many choices

**55%**

(146i)

Rather buy products online vs. a retail store

**30%**

(139i)

Enjoy browsing in store

**56%**

(115i)

**Purchased Online** (Past month):

Groceries **47%** (139i)

Clothing **40%** (125i)

QSR **32%** (140i) | Beauty

products **27%** (150i)

## Milestone Millennials

Rather buy products online vs. a retail store

**36%**

(170i)

Approve of the brands I buy

**27%**

(140i)

Hard to make decisions with too many choices

**48%**

(128i)

If I want... would rather buy on credit than wait

**34%**

(114i)

**Purchased Online** (Past month):

Groceries **42%** (122i)

Clothing **38%** (119i)

Household products **28%**

(113i) | QSR **28%** (125i)

# Gen X

If I really wanted..  
rather buy on  
credit than wait

**34%**

(122i)

Buy product  
online vs. visit  
store

**26%**

(122i)

## Advancing Gen X

**Researched online** (past week):  
Household Products **27%** (106i)  
Travel and Vacations **23%** (106i)

## Advancing Gen X

**Purchased online** (past month):  
Groceries **41%** (121i)  
Clothing **36%** (113i)  
Household products **28%** (110i)  
QSR **26%** (115i)

# Boomers

Rather buy products online

**12%**

(55i)

Approve the brands I buy

**13%**

(69i)

Too much choice

**30%**

(79i)

Buy on credit than wait

**27%**

(90i)

**Freedom 55+**

**Researched Online** (past week):  
Home improvement products **29%**  
(118i)

**Researched Online** (past month)  
Personal banking and invest. prod.  
**28%** (104i)

# Radio works in tandem with the internet.

Canadians 15+

Checked things  
out on the  
internet after  
hearing radio ad

**46%**

Radio ads have  
prompted me to  
do a search for  
something

**34%**

Visited websites  
of radio  
advertisers

**28%**

Purchased a  
product online  
after hearing a  
radio ad

**20%**

# Radio informs consumer behaviours.

Canadians 15+

Helps me discover stores or services in my town or city

**45%**

Radio lets me know about limited time offers

**33%**

Reminds me of brands or products I might need

**27%**

Recommended product/service heard advertised on radio

**21%**

# Radio amplifies shopping behaviours.

FOMO for **Millennials** is alleviated by Radio because it reminds them of limited time offers.

Reminds all Canadians about brands/products they might need.

From Milestone Millennials through to through to Gen X, Canadians are more likely to purchase a product online after hearing a radio ad.

Maturing Millennials **36%** (109i)

Maturing Millennials **26%** (94i)  
Milestone Millennials **29%** (107i)  
Advancing Gen X **30%** (111i)  
Established Gen X **31%** (115i)

Milestone Millennials **22%** (108i)  
Advancing Gen X **22%** (109i)  
Established Gen X **25%** (123i)

## Radio Works

1

### **Generations.**

Looking exclusively at traditional buying demos and behaviours is ineffectual because generations are not distributed equally.

2

### **Audio connects all generations.**

Each generation has their own reason to listen, whether for music discovery, news and information or to keep them company.

3

### **Personal music means disconnecting.**

It's about control and instant gratification.

4

### **Radio is interesting and enjoyable.**

To be attentive is to be engaged.

5

### **Ad avoidance.**

Younger Canadians take control of their ad exposure.

6

### **Digital Incognito.**

As Canadians continue to mask their online identity, digital ads become less relevant,

7

### **The Ups and Downs of Social Media.**

Gen Z and Younger Millennials feel the negative implications of social media the most.

8

### **Young Canadians are audible learners.**

Triggers audio sensory meridian responses.

9

### **Internet gets the credit.**

Ads get noticed and remembered most on television and radio.

10

### **Radio and internet are complementary.**

Ads on radio drive consumers to the internet.

11

### **Radio informs online shopping behaviour.**

All shopping types take action when they hear a radio ad.

# Thank You.

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