



# Radio On The Move's Fall 2022 Share Of Audio Update

# Radio On The Move's Share of Audio Fall 2022

A snapshot of how the audio landscape has evolved since the Spring 2022

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## Wave 3 Share of Audio

Key insights on how changes in workplace location and commuting has impacted audio

31

## Timely

Questionnaire was in field from October 14 through October 31, 2022



## Nationally Representative

Online panel survey conducted through Maru Voice Canada



## Robust Sample

3,114 Canadians 18+ regionally and demographically representative

# Definitions Used

## Streamed AM/FM Radio

Broadcast AM/FM Radio streamed through a website, mobile app, or smart speaker

## Podcasts

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

## Ad-Supported Music Streaming (Free)

Music streaming services that include ads, but do not have a paid subscription

## Ad-Free Music Streaming (Paid)

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

## YouTube for Music

Accessing YouTube to listen to music, as opposed to video content

## Personal Music

CDs, vinyl, and owned digital music files such as mp3s





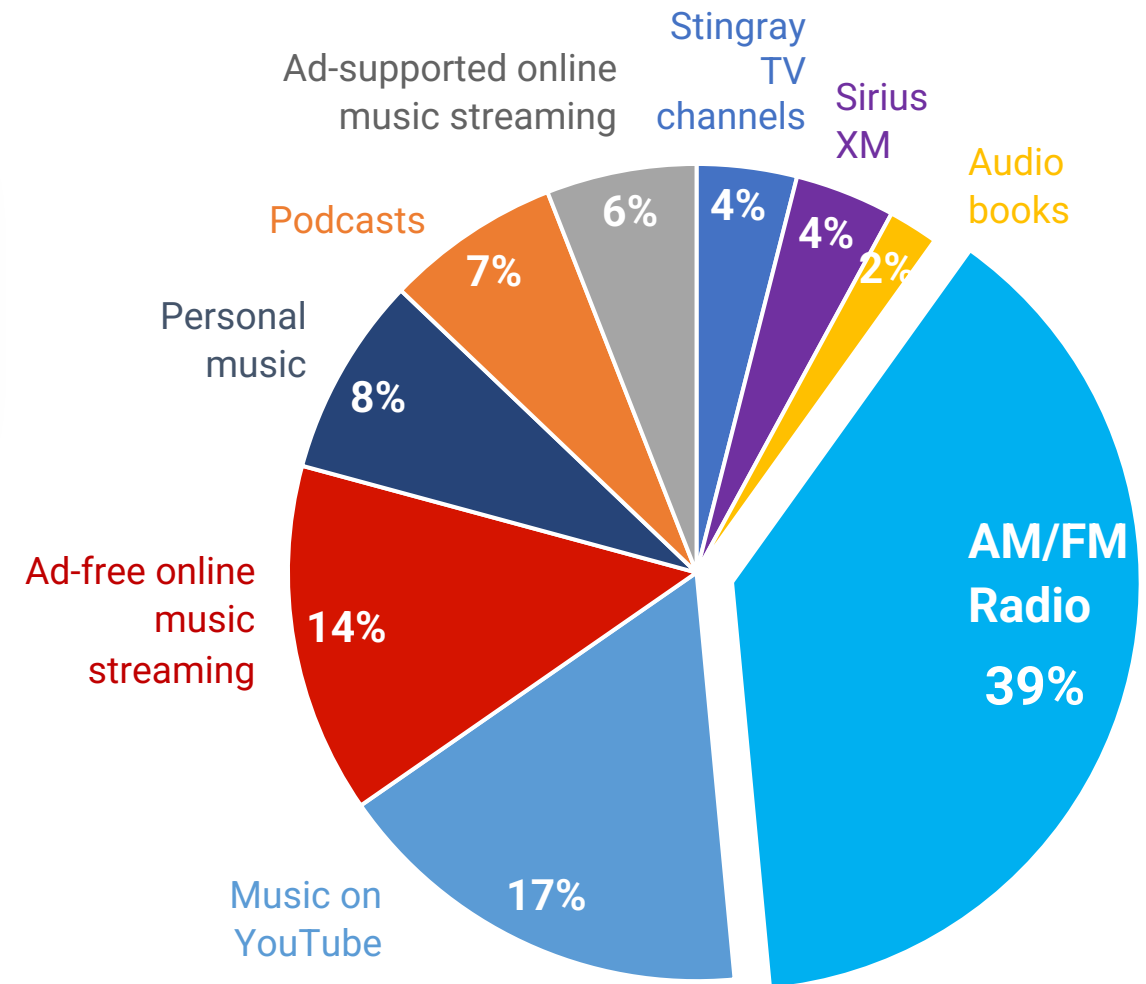
# AM/FM continues to be the largest source of audio listening for Canadians

## A18+ share of time spent

While AM/FM's share remains consistent with Spring 2022, Podcasts and Free Ad-supported Music Streaming are each down 1 point. Personal Music is down 2 points, and Paid Music Streaming is up 1 point.

# 39%

AM/FM Radio's share of time spent amongst audio platforms is consistent with Spring 2022



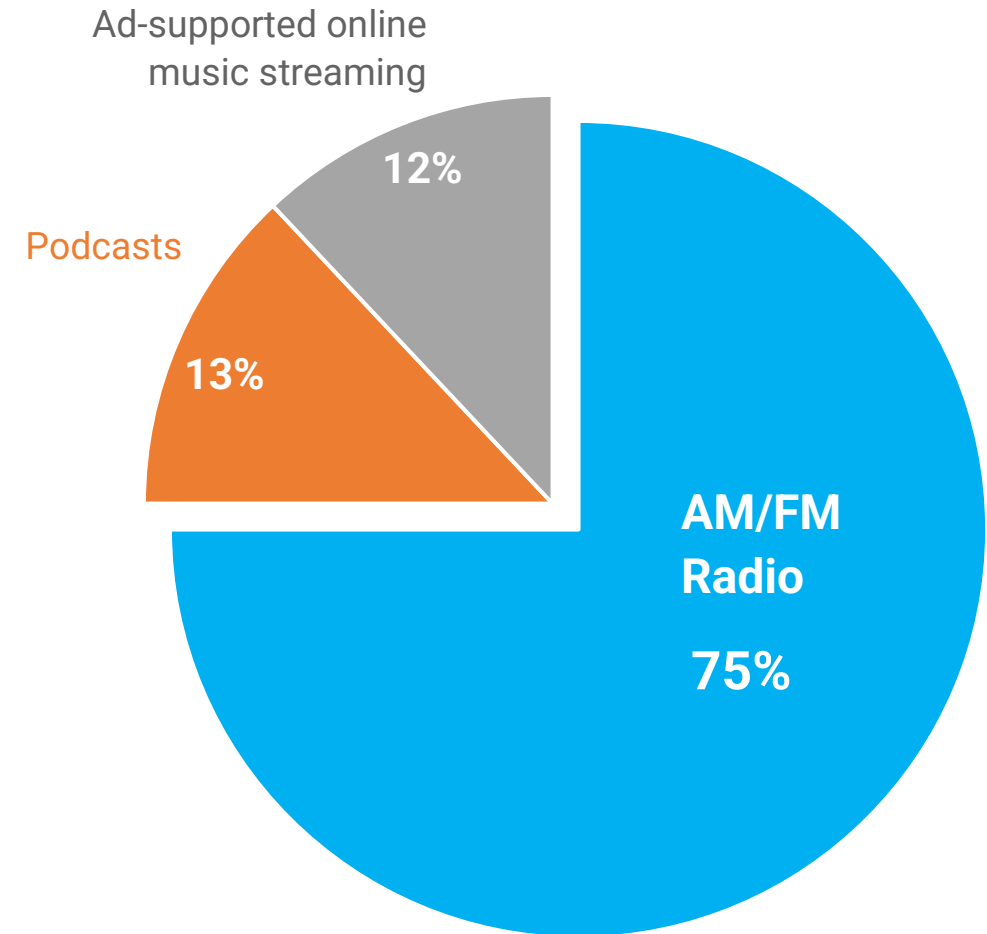
# AM/FM Radio is the dominant audio available to reach consumers with advertising messages

## AM/FM share of buyable reach is >5x greater

When it comes to reaching audiences, AM/FM has the greatest share of listeners.

75%

AM/FM Radio's share of time spent is up from 73% in Spring 2022

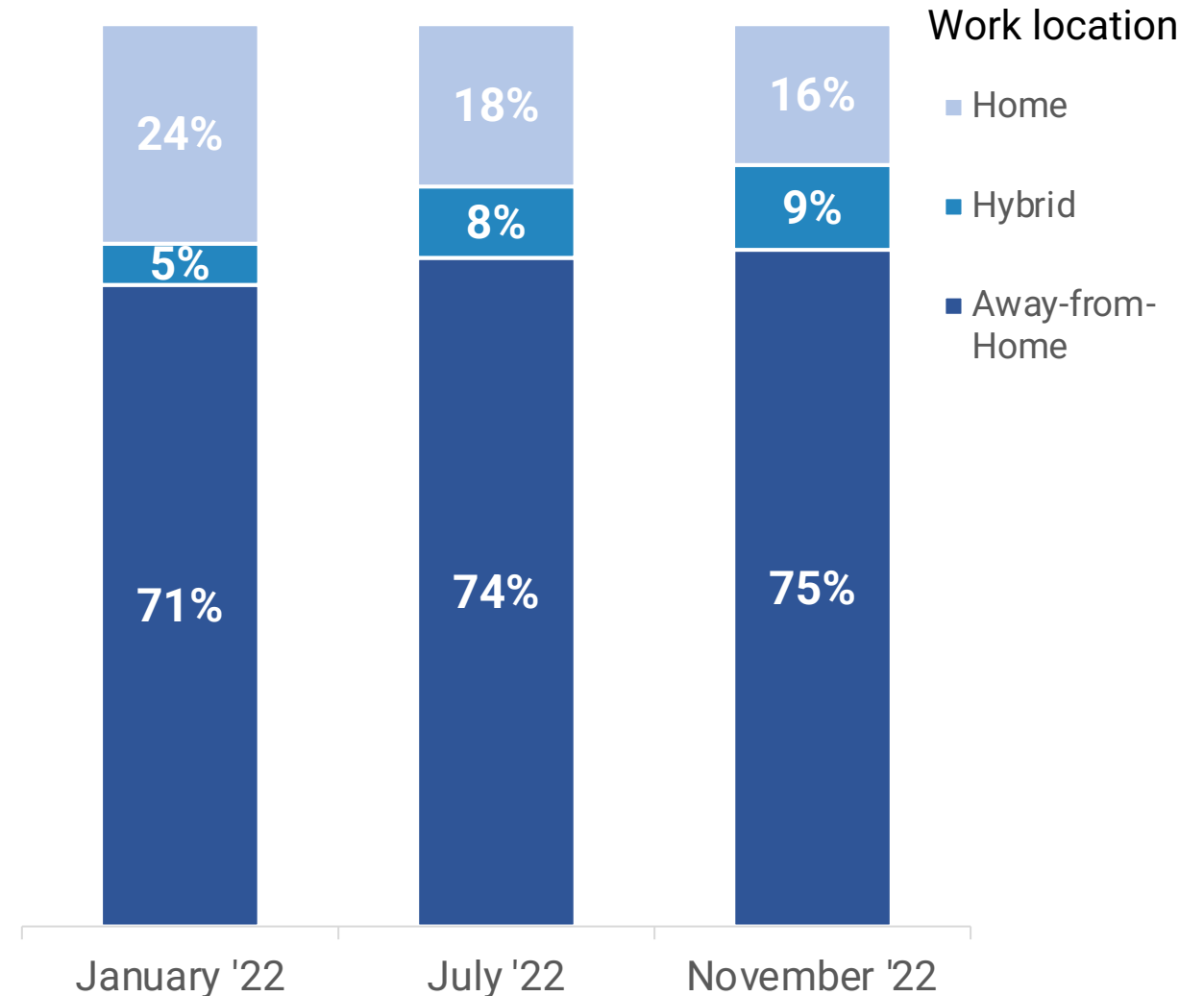


# Working Canadians are increasingly moving back to the workplace

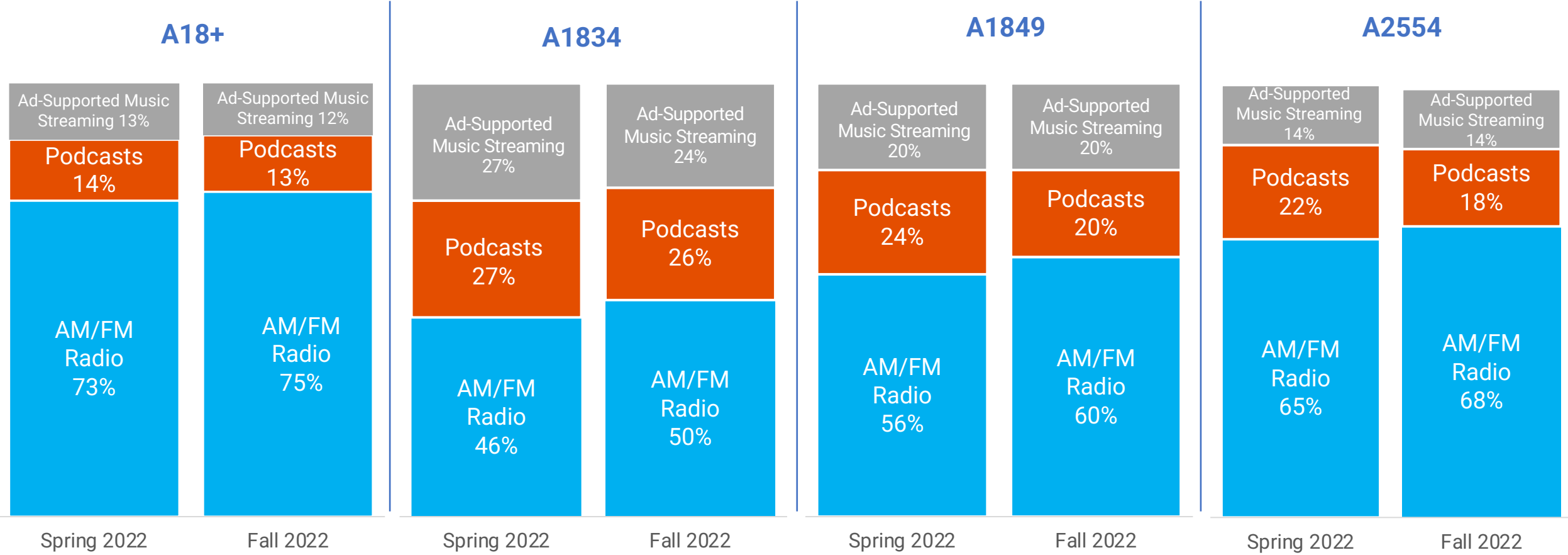
## More Canadians are back on the road

Statistics Canada reports that only 16% of employed Canadians are working exclusively out of their home, down 50% from the beginning of 2022.

**84%** of working Canadians are now working away from home at least some of the time

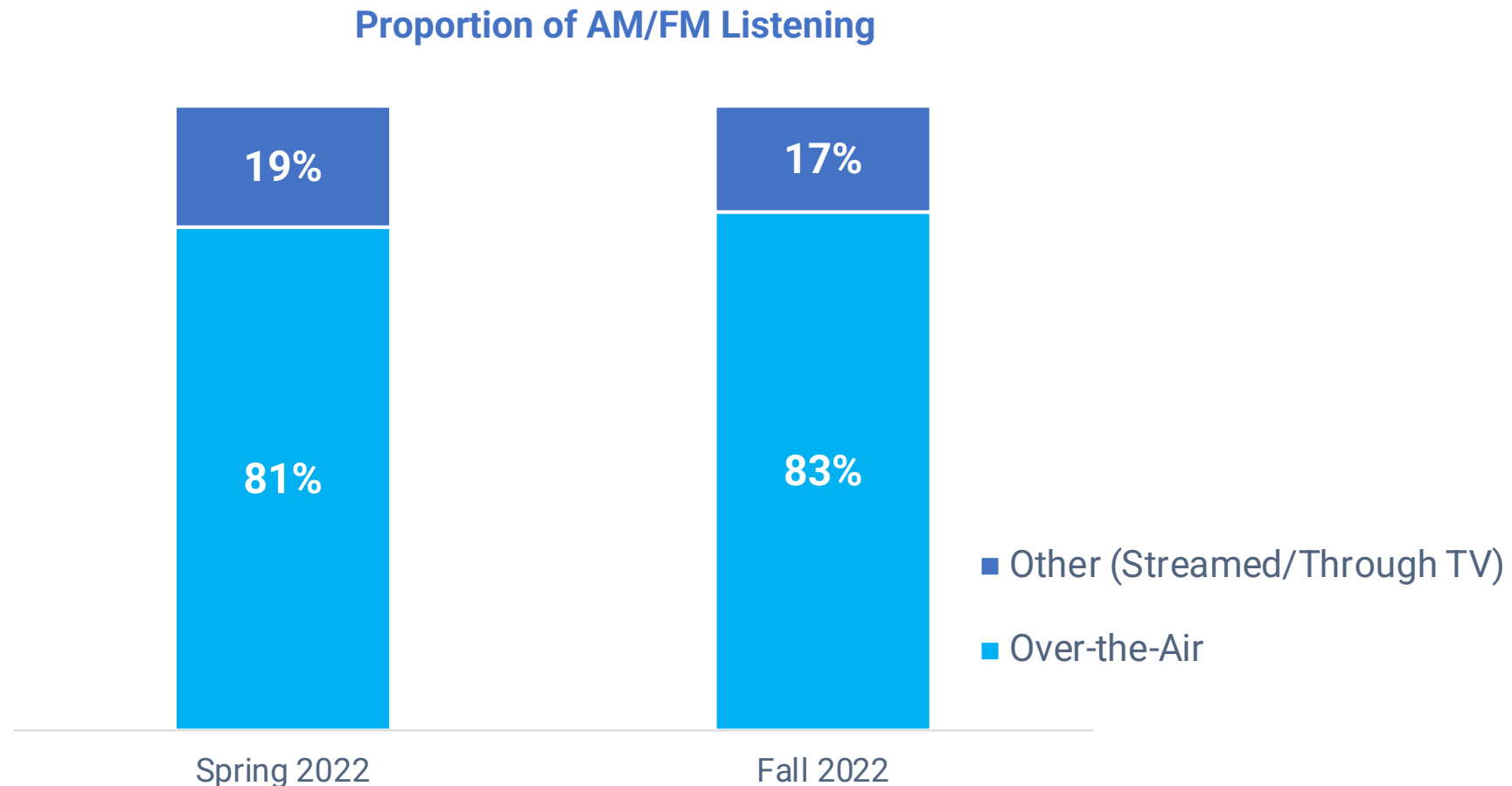


# As commuting begins to increase, AM/FM's share of buyable audio has increased from Spring 2022



7 B3Dx. Thinking of the following type(s) of audio that you mentioned listening to yesterday, how many hours and minutes in total did you spend listening to each one?  
Base: Canadians 18+ (n=4,171); 18-34 (n=1,057); A25-54 (n=2,389) / Fall 2022 18+(n=3,114); A18-34 (n= 849); A25-54 (n= 1,730)

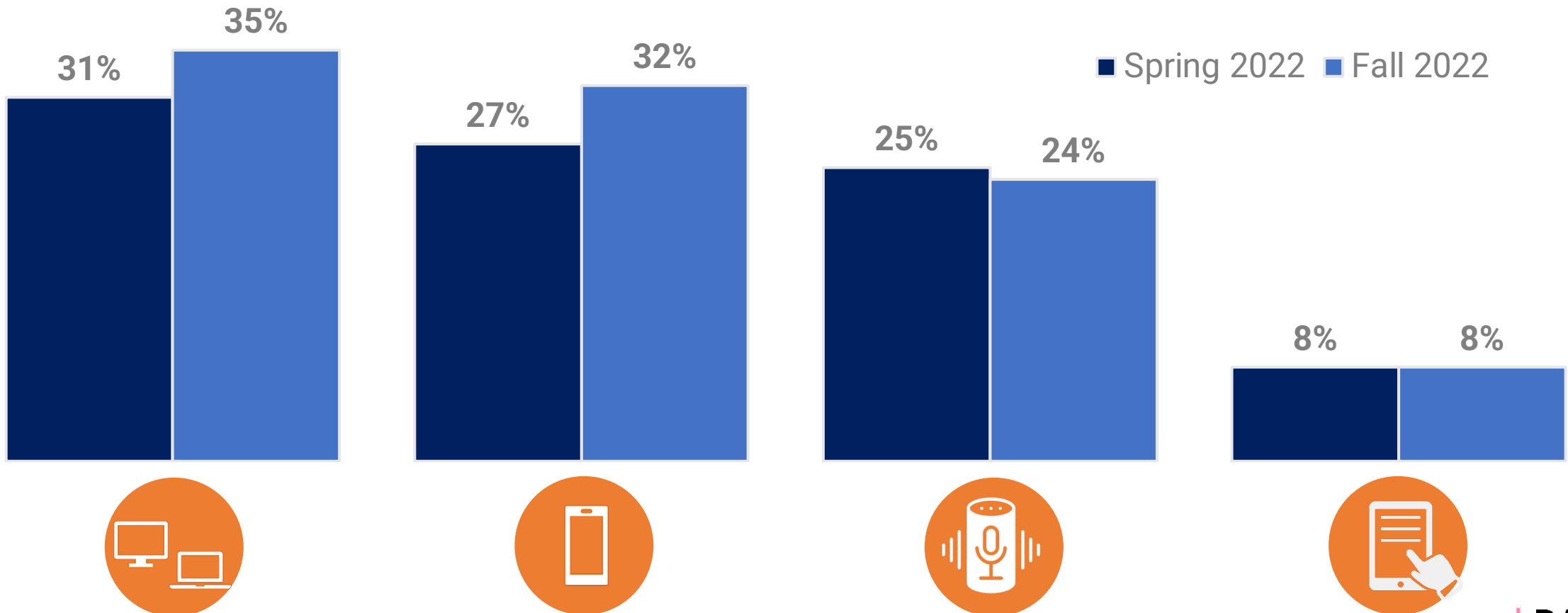
# With more commuters back on the road, OTA share has increased from Spring 2022





# With workers returning to the office and more out of home tuning, AM/FM streaming via smartphone and PC's has increased

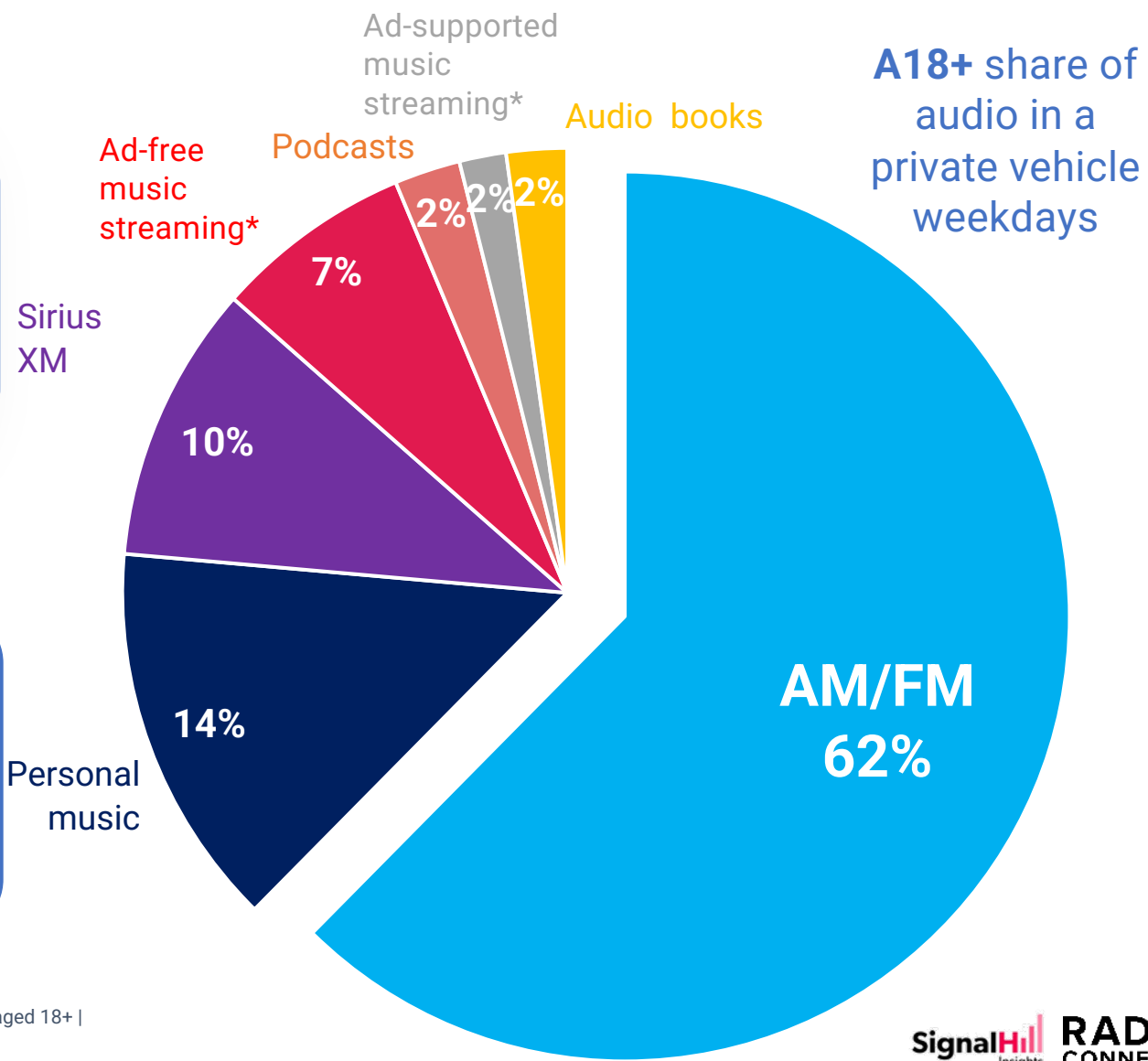
Past week listening to AM/FM streaming, by device  
(Among 18+ who streamed AM/FM in the past week )



# More commuting puts AM/FM in the driver's seat for in-car audio

**More commuters means more listeners**  
As more people return to commuting, more people are spending more time listening to AM/FM Radio in-car.

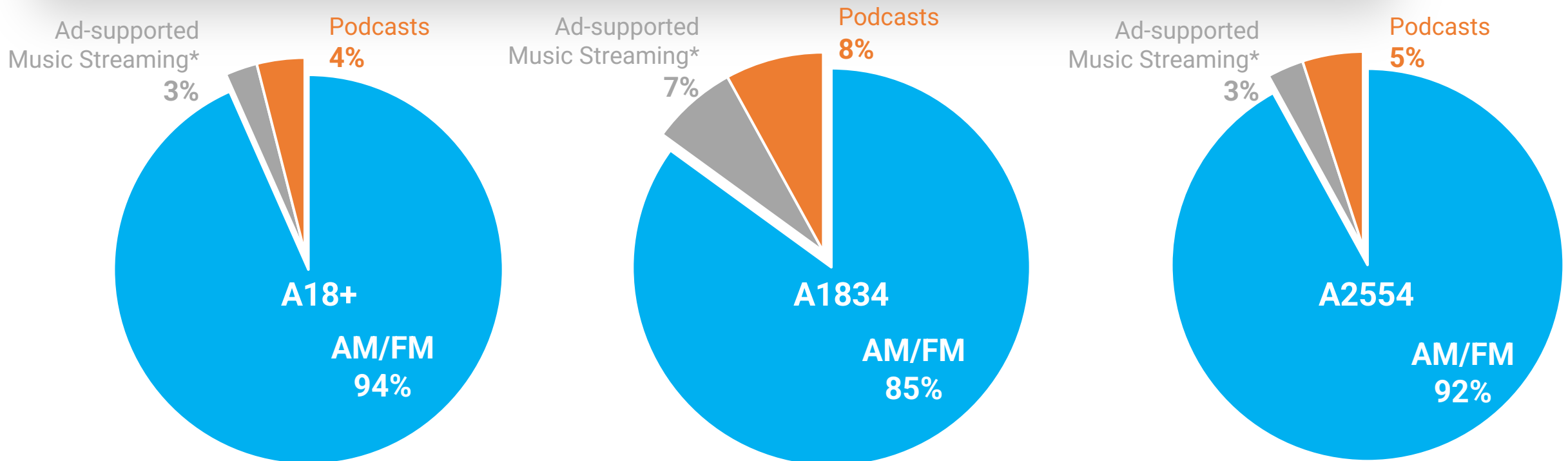
**62%** Share of in-car audio tuning that goes to AM/FM Radio



10 \* Estimated share split for ad-free and ad-supported audio based on ratio from June 2022 study of 1,897 Canadians aged 18+ | C2. Thinking of all the time you spent in the vehicle YESTERDAY, how much time did you spend doing the following  
Base: Canadians 18+, in a private vehicle yesterday (n=2,640)

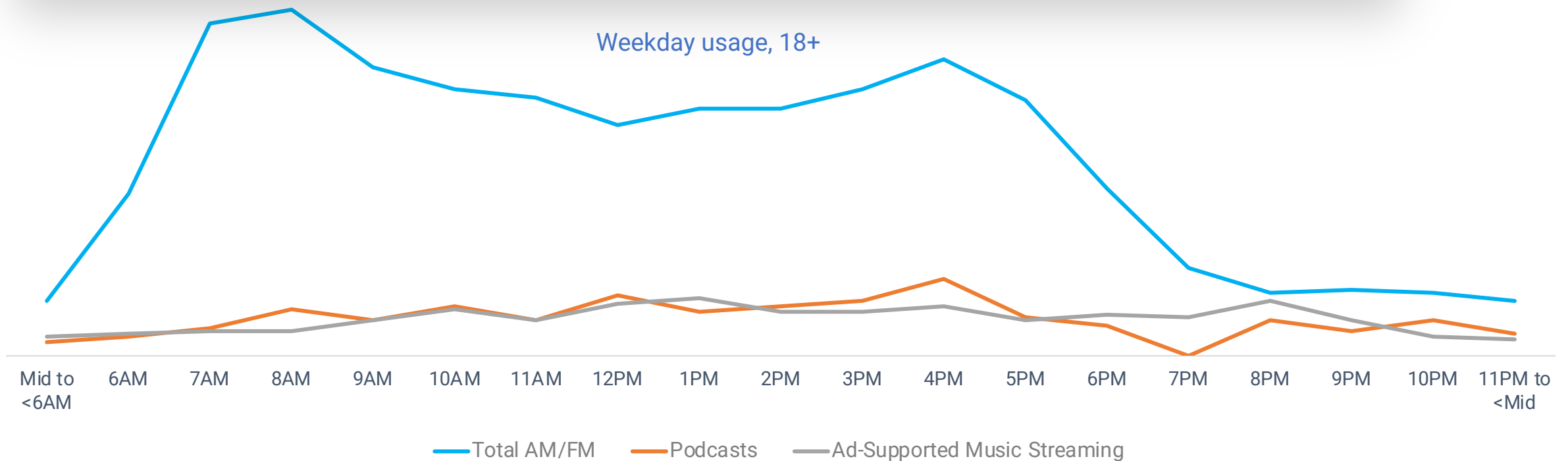
# AM/FM is the clear option for the last mile in the path to purchase

As the dominant buyable in-car audio, only radio effectively reaches consumers when they are out-and-about and ready to spend



# AM/FM Radio continues to lead in buyable audiences throughout the day

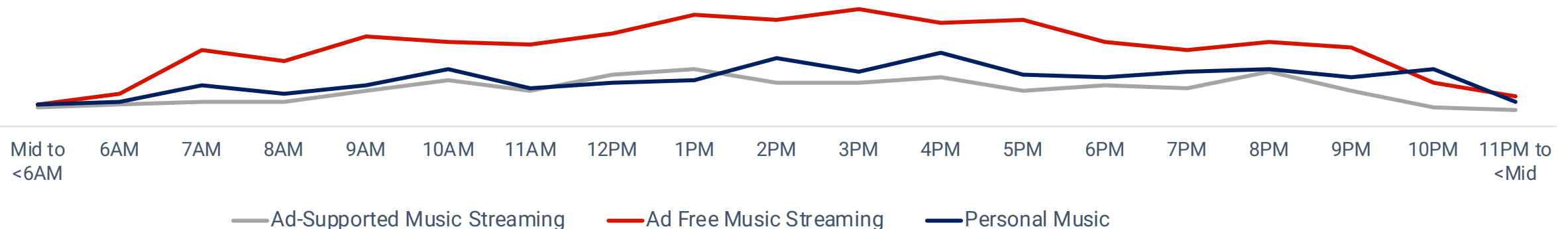
When screens are off and stores are open, AM/FM Radio is on



# Throughout the day, patterns for Canadians listening to owned music and their subscribed music are in sync

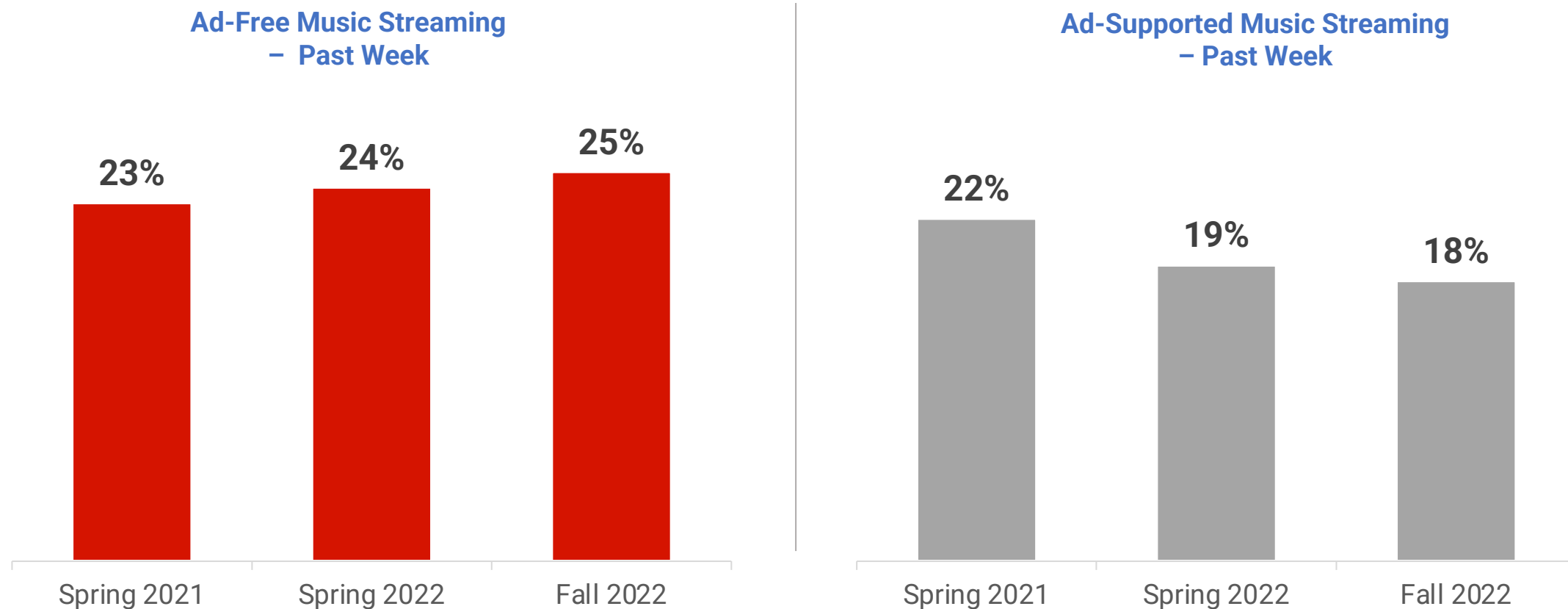
As a digital extension of owned personal music, music streaming helps listeners escape, relax and disconnect from the everyday – providing “me time”

Weekday usage, 18+



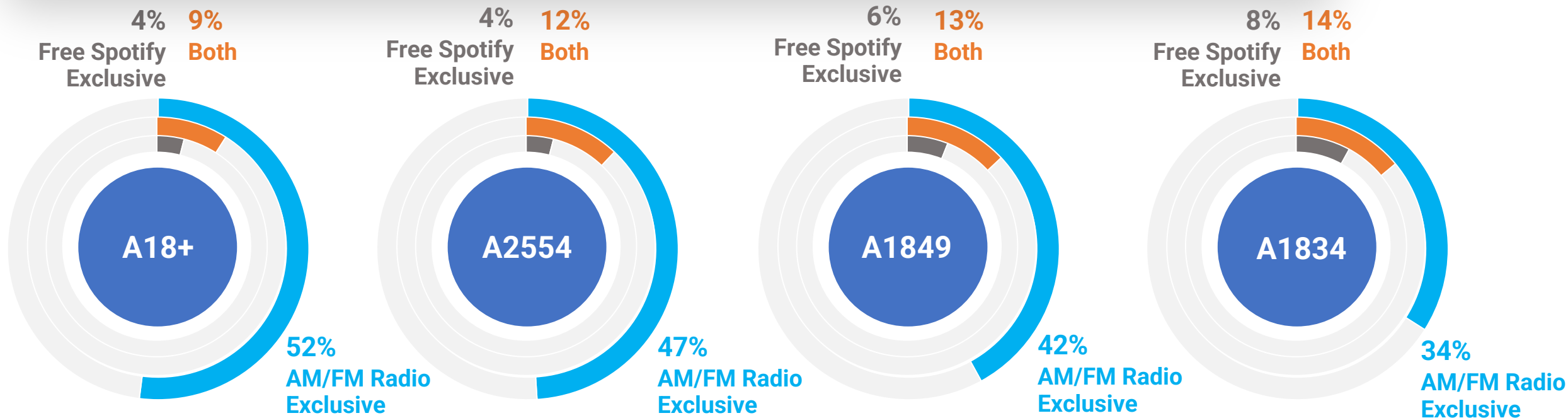


# The reach of ad-free music streaming continues to grow while reach of ad-supported streaming is declining



# AM/FM delivers greater exclusive weekly reach than free ad-supported Spotify, across all key demos

Free ad-supported Spotify exclusive reach down slightly from Spring 2022 among A18-49 and A18-34



B3e\_STREAMING\_2. You mentioned listening to free online music streaming in the past week. Which of the following FREE services did you listen to in the past week?

B3B. When is the most recent time, if ever, you listened to the following types of audio on ANY DEVICE? SUMMARY TABLE OF PAST WEEK

Base: Canadians 18+ (n=3,114); A18-34 (n= 849); A18-49 (n=1,563) A25-54 (n= 1,730)

# Music streamers are heavy radio listeners

Among past week users of online music streaming services or YouTube for music:

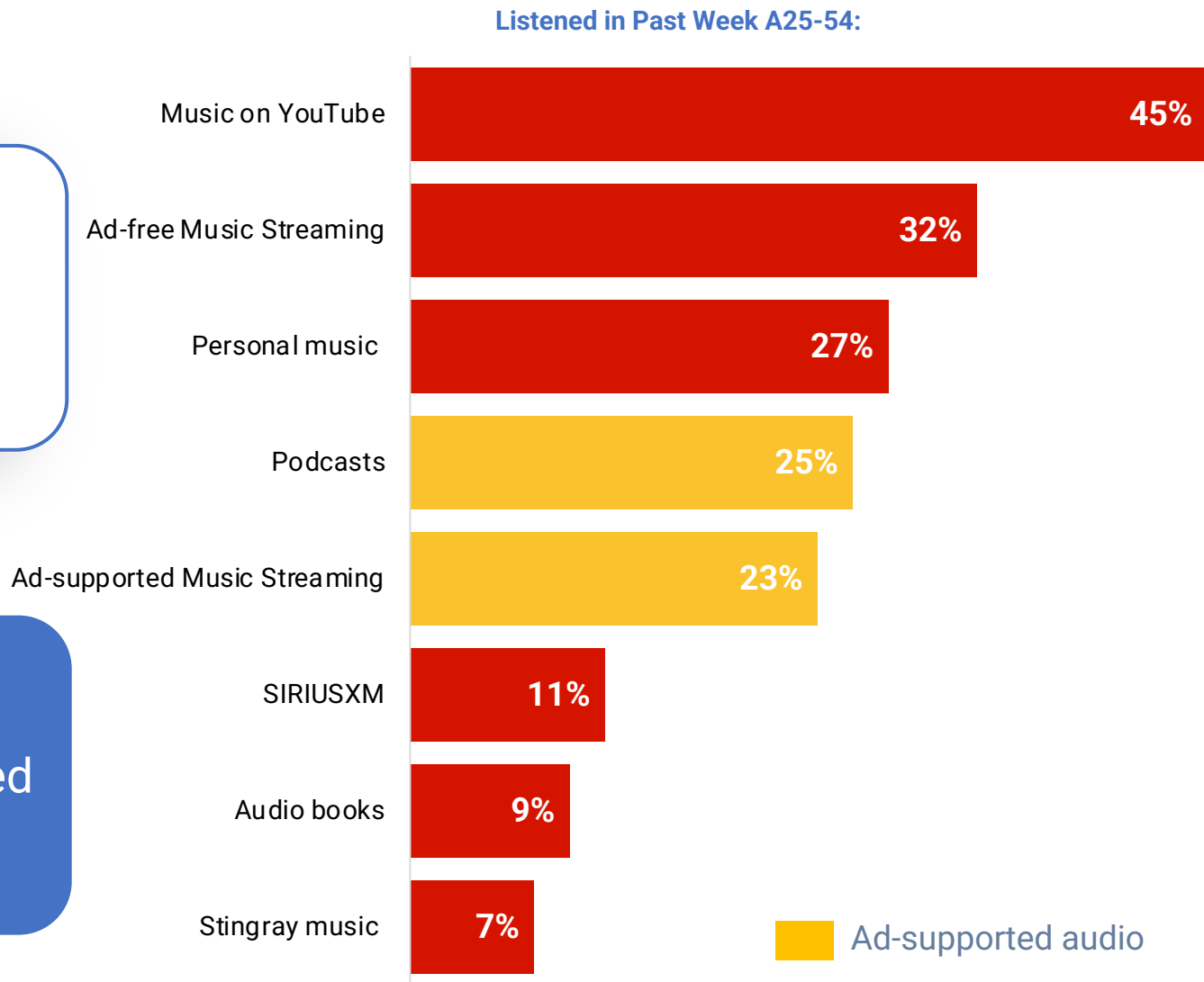


# Compared to other audio, AM/FM is the reach machine for advertisers

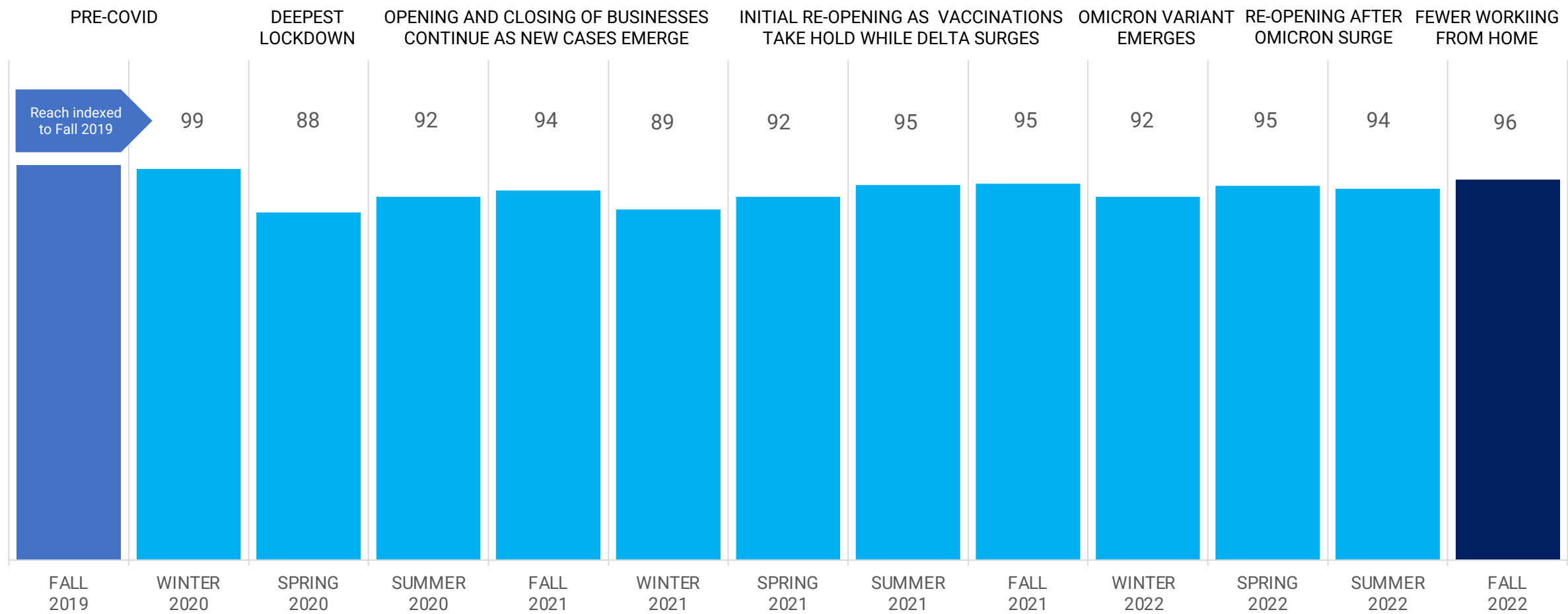
**AM/FM Radio is the dominant audio platform for advertising**

**86%\*** Average weekly reach against A2554 as measured by PPM

\* PPM FL 2022 Total Meter CTRL / AW / Weekly Reach %



# As Canadians new workplace routines and commuting take hold, AM/FM Radio's reach is indexing at 96 against pre-COVID Fall 2019.





# In Summary

AM/FM Radio share of buyable audiences has grown since Spring 2022

39%

## AM/FM Share of Audio

With the huge array of audio options, with and without advertising, AM/FM retains the lion's share of Canadians' time with audio

75%

## of buyable audio share

For advertisers, AM/FM Radio has the largest audiences available to reach Canadian consumers across all key demos. Buyable share up as more return to workplace

94%

## of buyable in-car audio

With more Canadians working away from home, AM/FM is in the driver's seat dominating buyable share of in-car audio across key advertiser demos.

96%

## of reach of Fall 2019

As the country emerges from lockdown and work from home mandates, AM/FM Radio is returning to normal reach levels



# Thank you

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