

FALL 2023

RADIO ON THE MOVE WEBINAR Q&A



Q1: What about paid music streaming?

- Personal music, whether consumed digitally through a paid subscription or through physical ownership like vinyl, CD or MP3 downloads, is not commercially available to advertisers and therefore not addressed in Radio On The Move.
- As discussed, paid music streaming is replacing personal music libraries, with more Canadians choosing to rent vs. own their personal music.
- This is not a replacement of listening to Live Radio, as personal music has always been part of the audio experience for Canadians.
- What has changed is the ability to reflect this consumption in the audio landscape, as the time spent with personal music was never calibrated or included as part of the “time spent with audio pie”.

Q2: The information about how people get their news off of Meta, is that info from a self-report survey or usage data?

- The question was asked as part of the Radio On The Move Fall 2023 survey to understand if the changes made by Meta regarding news had any impact on Canadians' consumption of news and what the ensuing impact might be on Radio.
- It was asked to understand how many Canadians said they were previously exposed to news on the Meta Platforms – 49% said they were.
- A follow up question was asked of the 49% to understand where they were now getting that news from – almost ¼ of them said they were going to resources, like TV, Radio and physical Newspapers to get their news.

Q3: Podcast listing also seem low in Atlantic Canada. Any reason?

- Content is primarily the reason why consumption is different in some regions
- Given podcasts typically skew to urban areas, (Vancouver has a higher percentage of listening than the average of BC, Toronto has a higher percentage of listeners than the average of Ontario), smaller regions with less urban communities, like Atlantic Canada, might be less inclined to listen to podcasts.
- Cultural preferences also may have an impact.

Q4: Any data on HD radio usage?

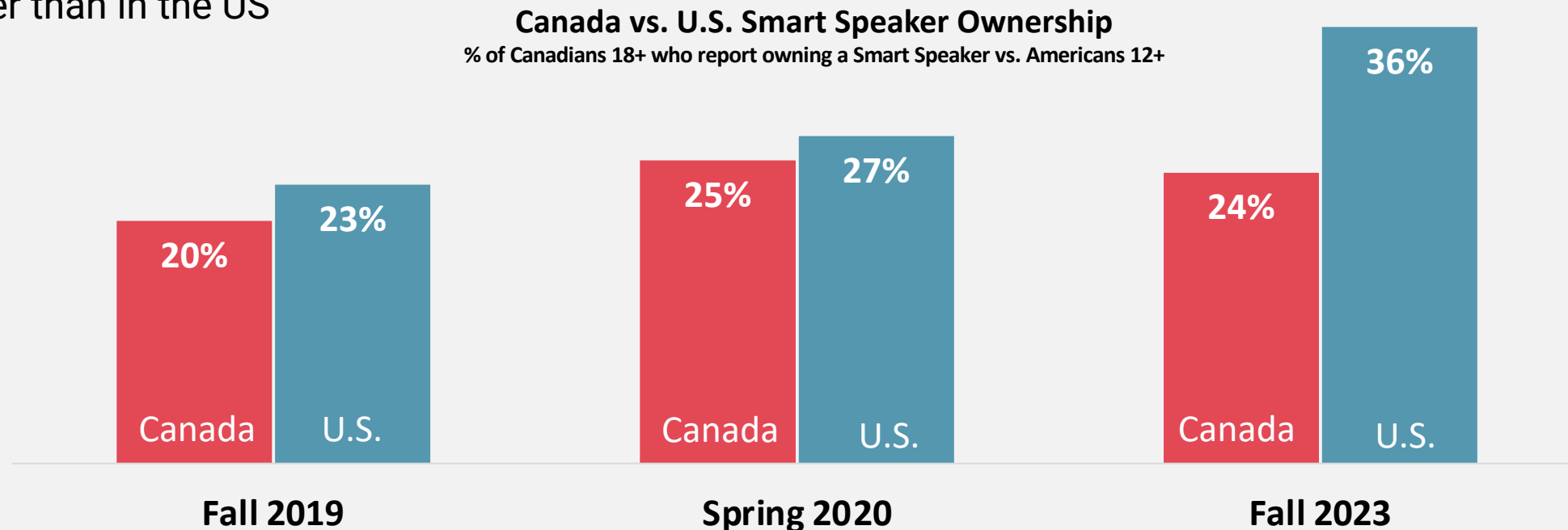
- Radio On The Move did not collect information on HD Radio in Canada.

Q5: How did you measure headset use with Podcasts?

- Headset usage to listen to podcasting was not collected.
- For Live Radio, 19% of Canadians 18+ responded that they listened to Radio using either a wired or wireless headset, which is a 46% increase from 2019.

Q6: Could you provide data/research on smart speaker penetration? Would be helpful to see actual charts.

- Current ownership of a Smart Speaker in Canada is 24% among A18+. While growth appears to have stalled, usage among those who have them to stream AM/FM has been consistent.
- Historically, more Canadians have Google Smart Speakers whereas in the U.S., Amazon is the dominant choice.
- Previous studies did indicated Canadians are more concerned over privacy which is why adoption may be lower than in the US



Q7: How do the majority of the findings here compare to the United States assuming the same research was done?

- The only similar research to *Radio On The Move* is Edison's Share of Ear.
- Although each use different methodology, the studies provide similar findings for Canada and the US, but in some instances, Live Radio in Canada has a higher share.
- For example, in-car the shares of various ad-supported audio will vary between Canada and the US due to the availability of ad-supported Sirius XM and Pandora.

Q8: A recent headline in an article in Media in Canada (or something like that), said YouTube and Spotify are bigger than radio – can you explain that?

- The headline was misleading as it did not define what was YouTube or service being referenced in terms of the YouTube or Spotify platforms when making the comparison.
- Both YouTube and Spotify have paid and ad-supported platforms, in addition to the fact that YouTube is largely a video platform, not audio.
- As discussed in the report, paid music streaming services are replacing personal music libraries, not Live Radio and the majority of streaming being referred to is to paid, non-commercial platforms, and therefore should not be compared to Radio.

Q9: You showed that most people are commuting by car vs. using transit. What does that look like in larger cities like Toronto/Vancouver and Montreal where there are more transit options?

- Toronto, Montreal and Vancouver data is not available individually, however as a combined urban area, approximately 11% are taking transit to get to work and 33% are daily drivers.
- For these urban drivers, the commute time would be longer and the absolute number of cars on the road, significantly higher.

Q10: Where do you think the podcast growth is coming from?

- The increased listening share for Podcasts is likely coming from Free Music Streaming, however, growth in Paid Streaming services may also be taking share from Free Music Streaming.
- Podcast growth does not appear to be coming at the expense of AM/FM Radio, as Radio's share of ad-supported audio has been consistent.