

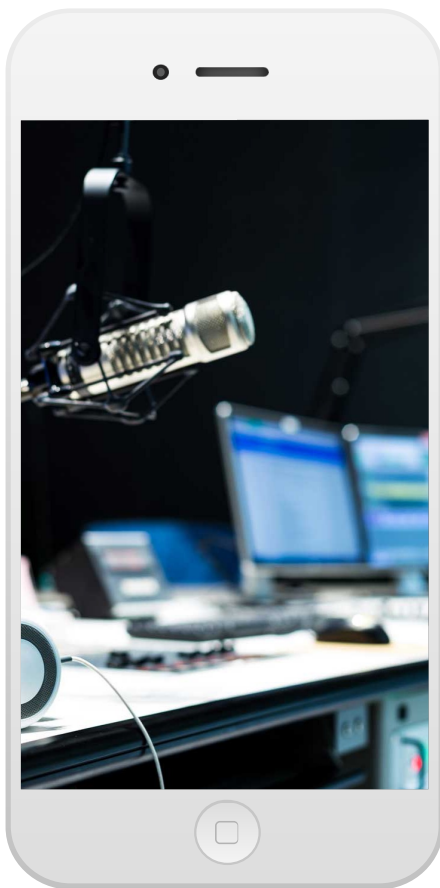


# Radio On The Move 2022

# Objectives

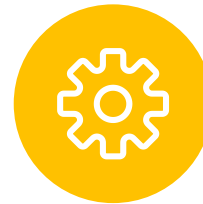
## 13 years of tracking the audio landscape

Since its first publication, Radio on the Move has been reporting on the radio landscape, following the evolution of Canadians' love of radio, in all its formats, across all the devices and locations – in the car and out of it.



### Investigate

The shifting technological preferences for consumption of audio by Canadians



### Inform

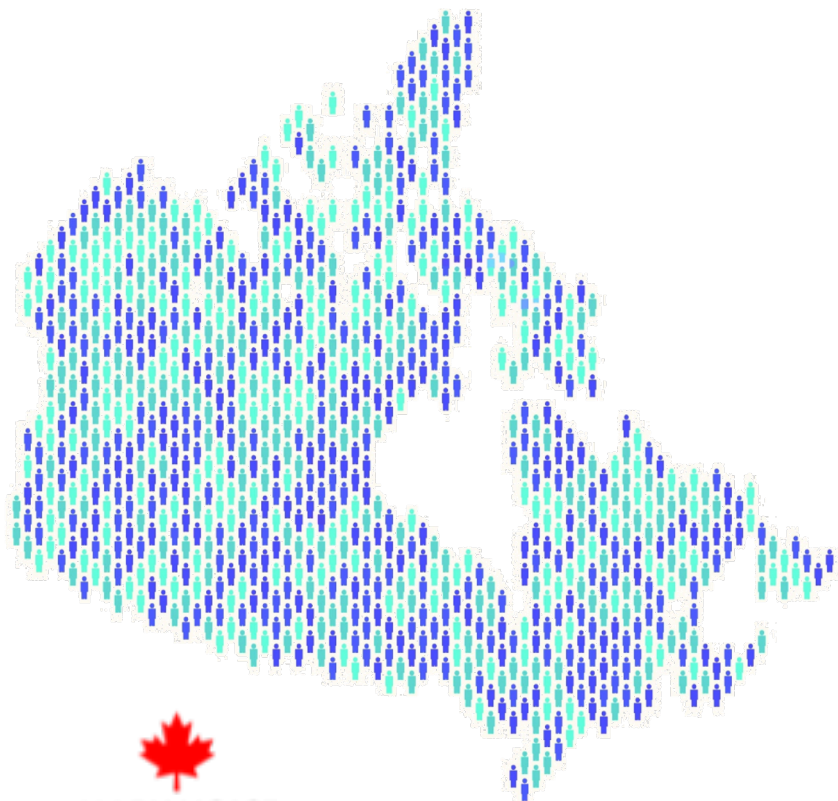
Updated, fully sourced, information for broadcasters and advertisers



### Identify

How Canadians' consumption of audio is evolving

# Study details



## Timely

An online survey  
conducted in March  
and early April 2022



## Canadian

Nationally  
representative of  
Canada through  
Maru Voice Canada



## Sample

4,171  
Canadians  
Aged  
18+

# Definitions Used

## Streamed AM/FM Radio

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

## 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

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

## Ad-Free Music Streaming

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

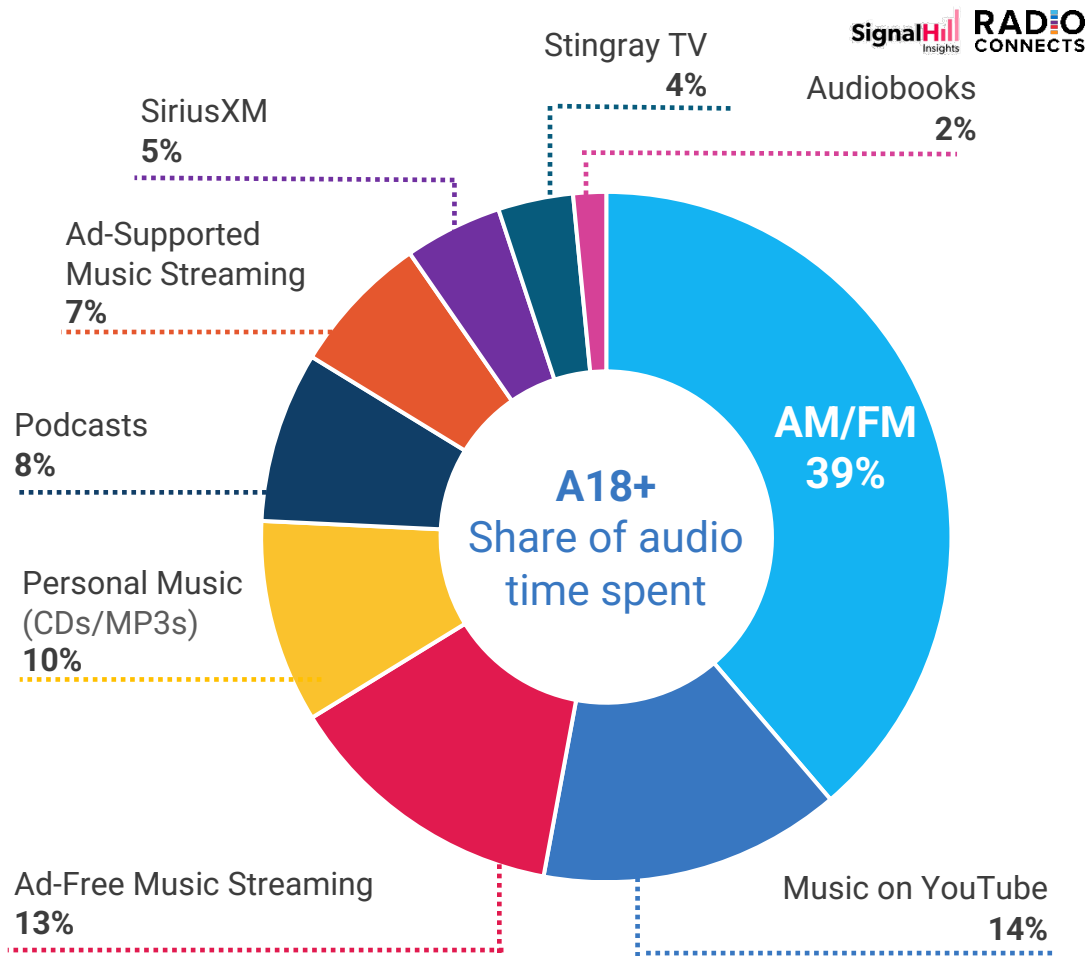


# Canada's Share of Audio 2022

A look at how Canadians were spending time with all audio formats during March and April of 2022 as Canada was emerging from COVID

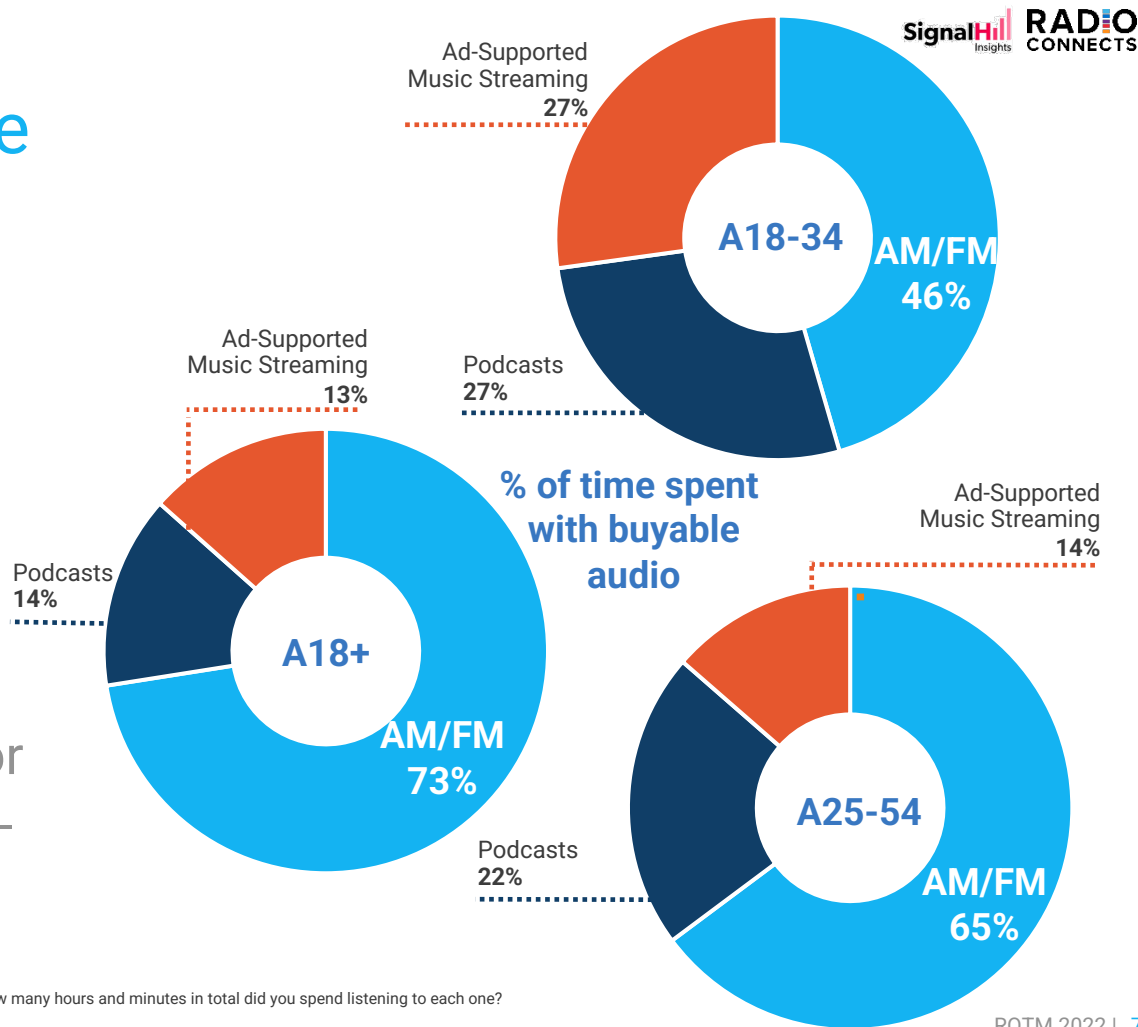
# AM/FM is the largest source of audio listening for Canadians

Canadians have never had more sources of music and spoken word content, yet AM/FM retains the lion's share of overall listening.



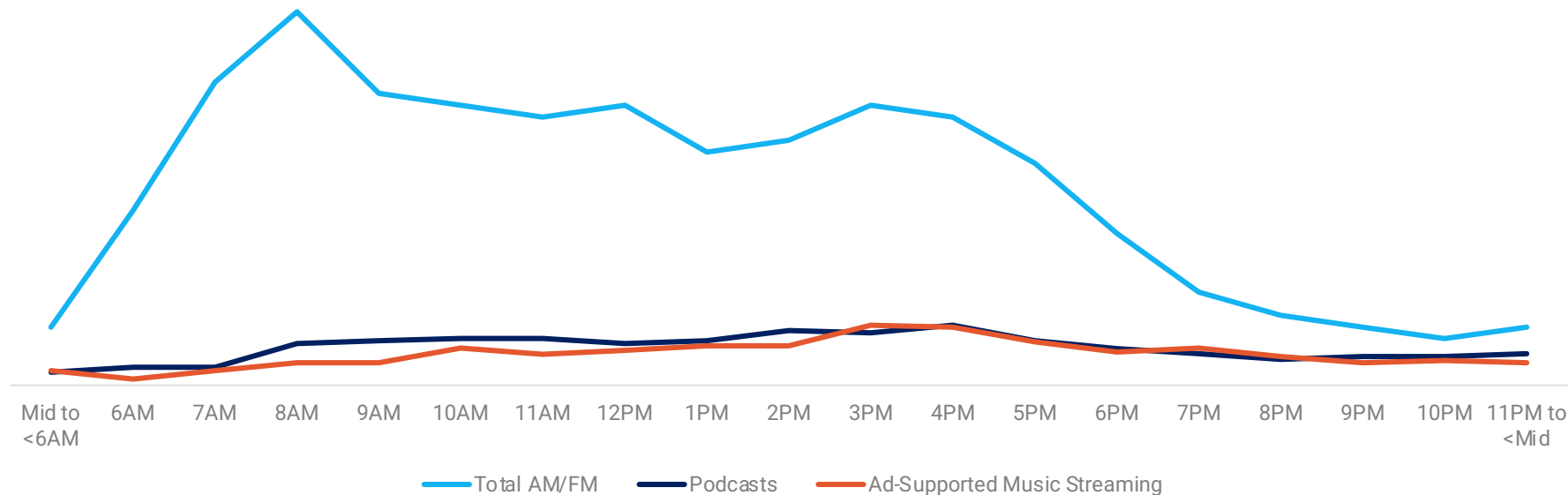
# AM/FM Radio has the largest share of buyable listening to reach advertiser demos

Among the audio inventory available to Canadian advertisers, AM/FM leads for time spent among adults 18-34 and 25-54.



# AM/FM leads for buyable audiences throughout the day

Weekday Usage by Hour - A18+



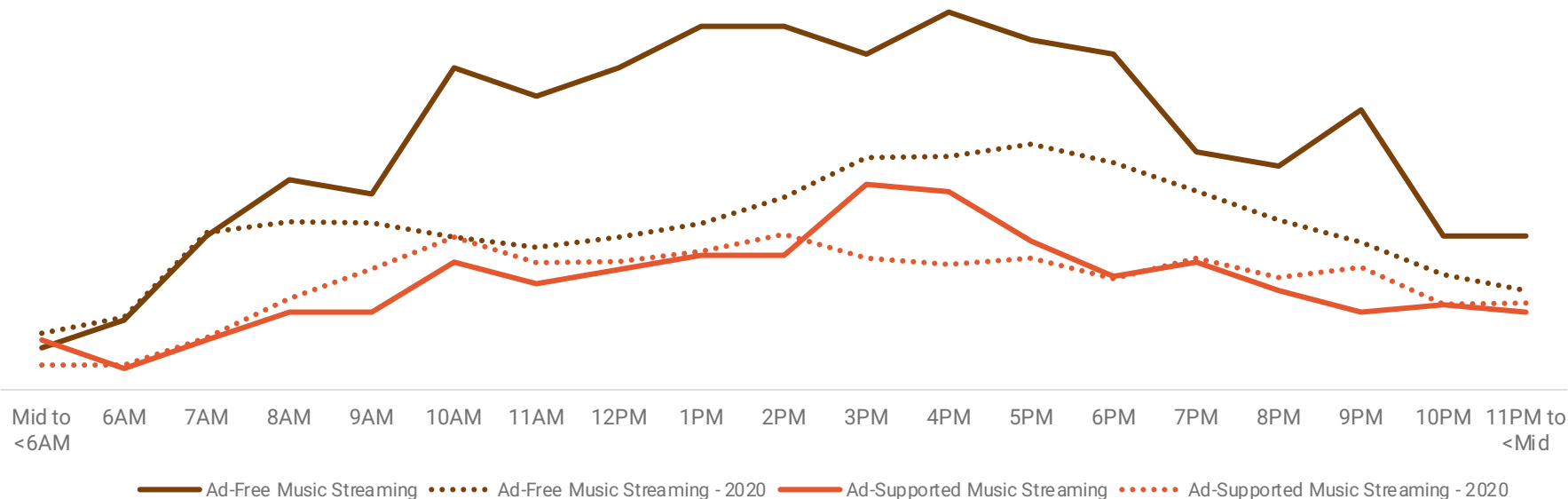
QB3d. IN WHAT HOURS yesterday did you listen to [media]?

Base: Canadians 18+, Apr 2022 (n=4,171); Fall 19/Jan 20 (n=4,000)



# Daytime listening to ad-free streaming up since 2020; little change in ad-supported streaming

Weekday Usage of Streaming Services by Hour– A18+

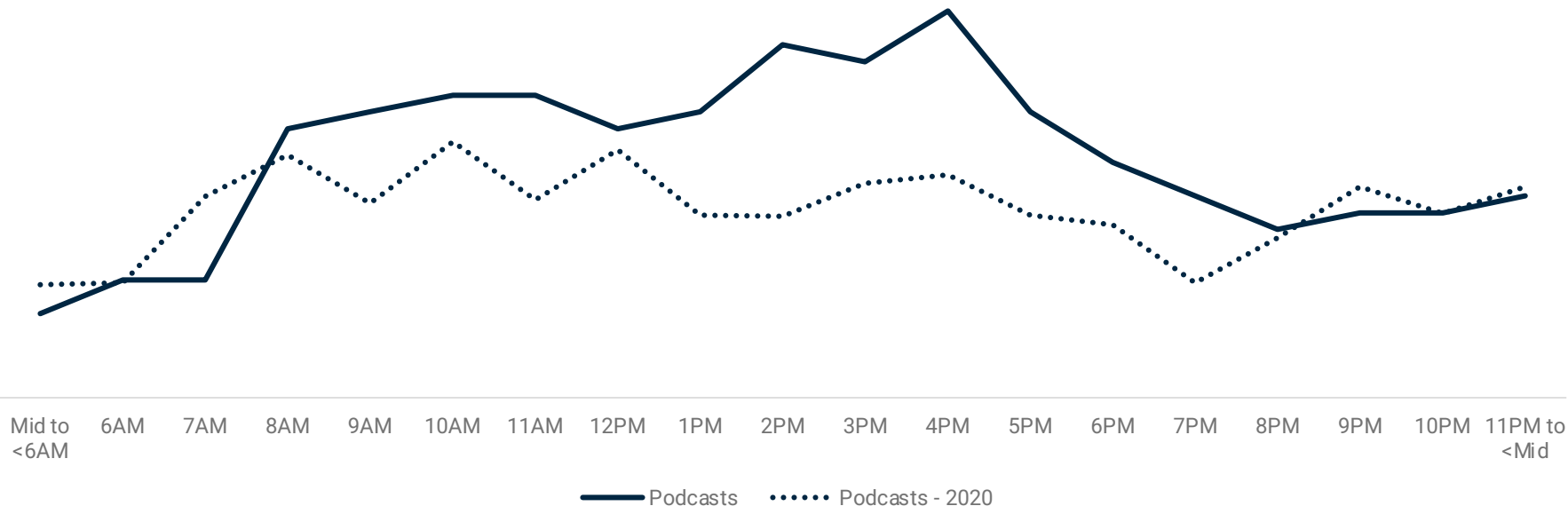


QB3d. IN WHAT HOURS yesterday did you listen to [media]?

Base: Canadians 18+, Apr 2022 (n=4,171); Fall 19/Jan 20 (n=4,000)

# Weekday podcast use up since 2020, particularly in afternoons

Weekday Usage by Hour - A18+



QB3d. IN WHAT HOURS yesterday did you listen to [media]?

Base: Canadians 18+, Apr 2022 (n=4,171); Fall 19/Jan 20 (n=4,000)



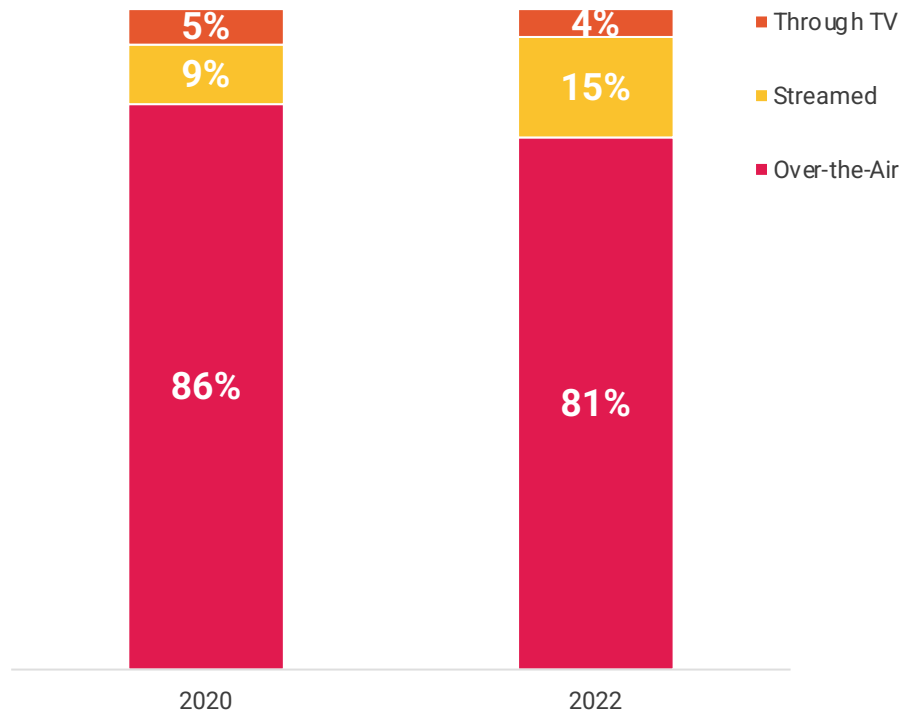
# Radio in the Digital Audio Age

AM/FM Radio is staking its claim in the digital audio space. Adding to its over-the-air reach advantage, AM/FM streaming is growing, empowering radio to offer advertisers the full benefits of digital audio.

# More time with AM/FM is going towards streaming

The share of time spent with AM/FM radio is increasingly digital, with streaming increasing to 15% in 2022, from 9% in 2020.

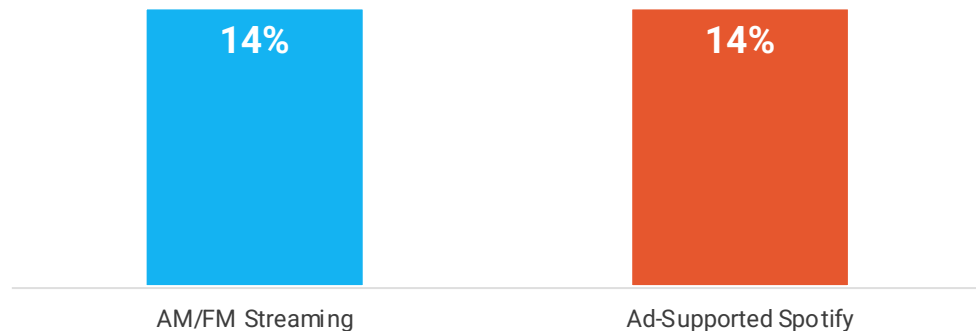
Proportion of AM/FM Listening



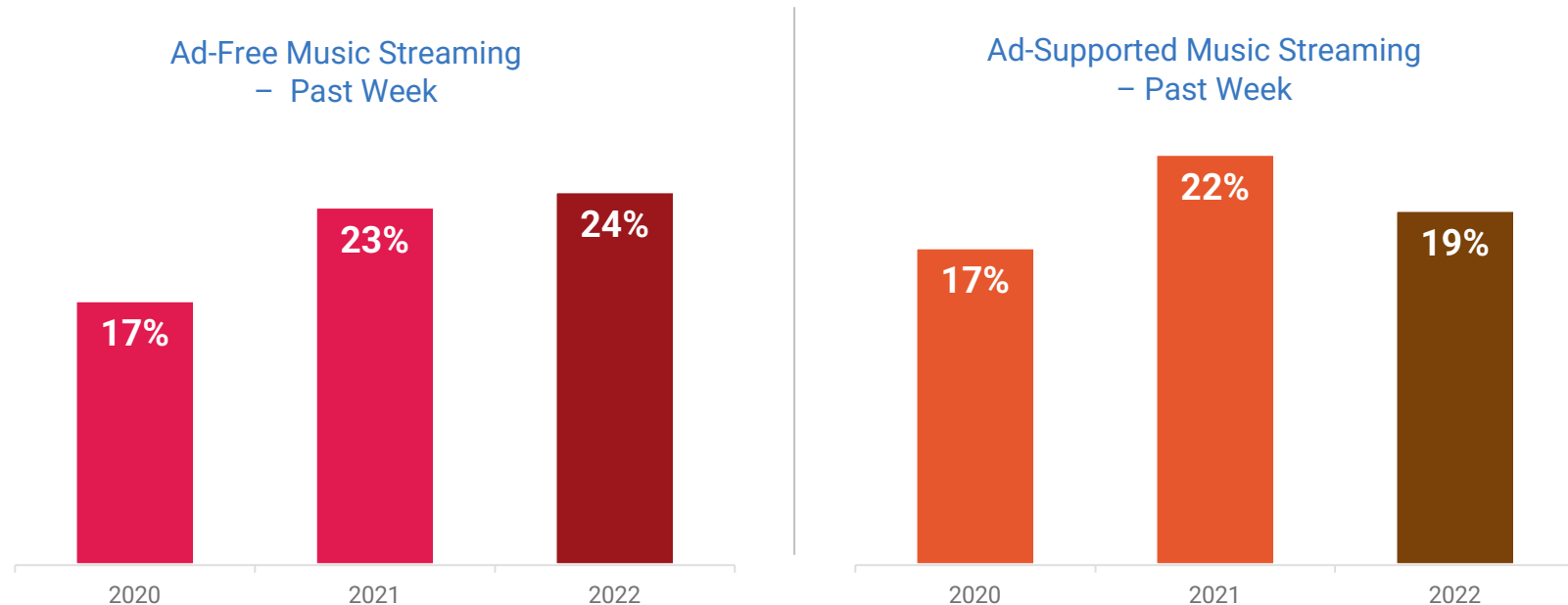
# AM/FM streaming delivers as many past week listeners as ad- supported Spotify

Addressable digital audio is not the sole domain of ad-supported Spotify. AM/FM streaming on its own delivers as much past week reach to advertisers as Spotify.

Past week usage

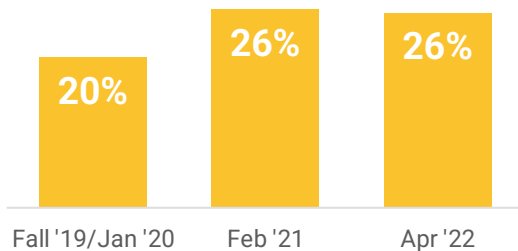
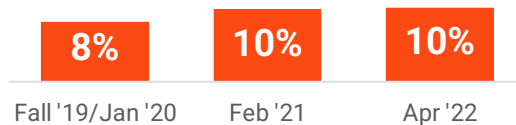
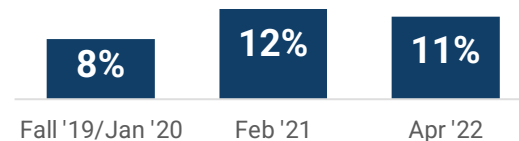
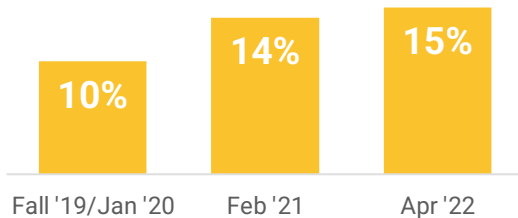
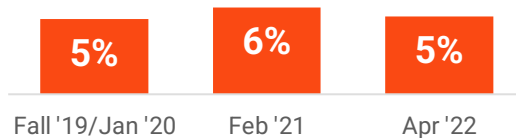
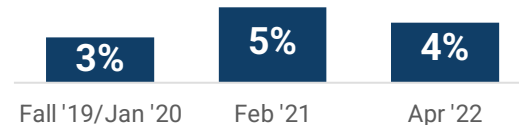


# Ad-free music streaming reach is growing slightly while ad-supported streaming is down from 2021



B3B. When is the most recent time, if ever, you listened to the following types of audio on ANY DEVICE?  
Base: Canadians 18+ Apr 2022 (n=4,171); Feb 2021 (n=2,001); Fall 19/Jan 20 (n=4,000)

# Use of music streaming services has plateaued

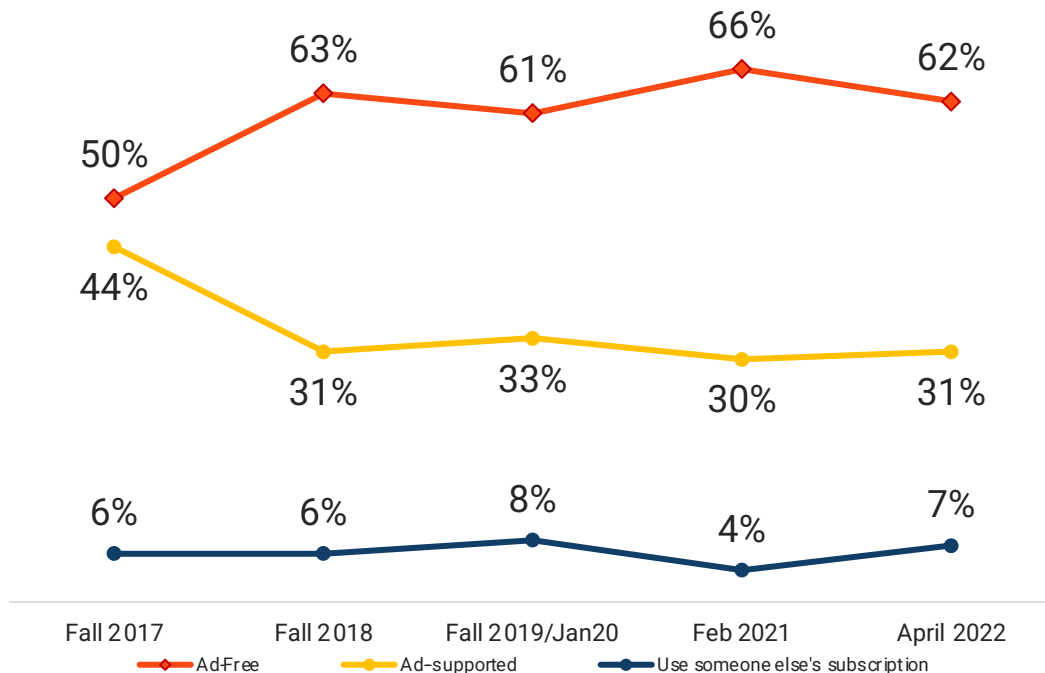
**SPOTIFY WEEKLY YOY****APPLE MUSIC WEEKLY YOY****AMAZON PRIME MUSIC WEEKLY YOY****SPOTIFY DAILY YOY****APPLE MUSIC DAILY YOY****AMAZON PRIME MUSIC DAILY YOY**

F13. Overall, thinking of all locations, how often, if ever, would you say you listen to:  
Base: Canadians 18+: Apr 2022 (n=4,171); Feb 2021 (n=2,001); Fall 19/Jan 20 (n=4,000)

Daily listening to ad-free Spotify continues to be 2x greater than listening to the ad-supported service

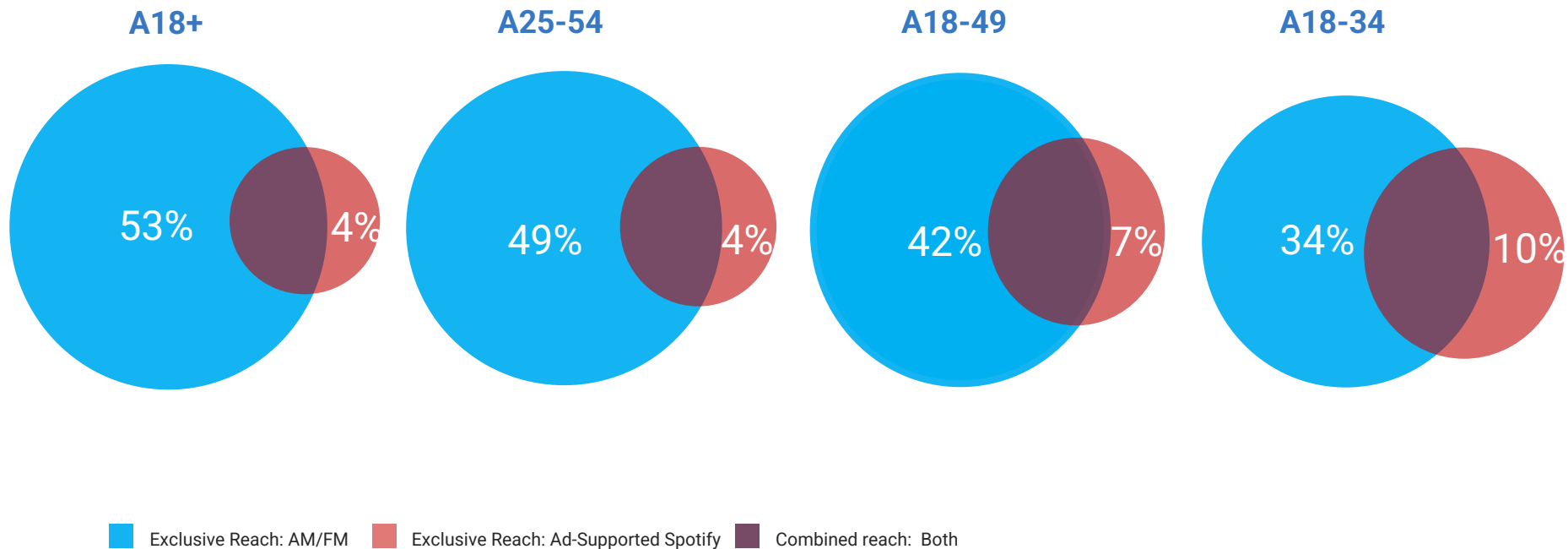
Fewer than 1-in-3 daily listeners to Spotify use the ad-supported service. Listeners who use “someone else’s subscription” is up slightly from last year.

Spotify Subscription of Daily Listeners





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



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?

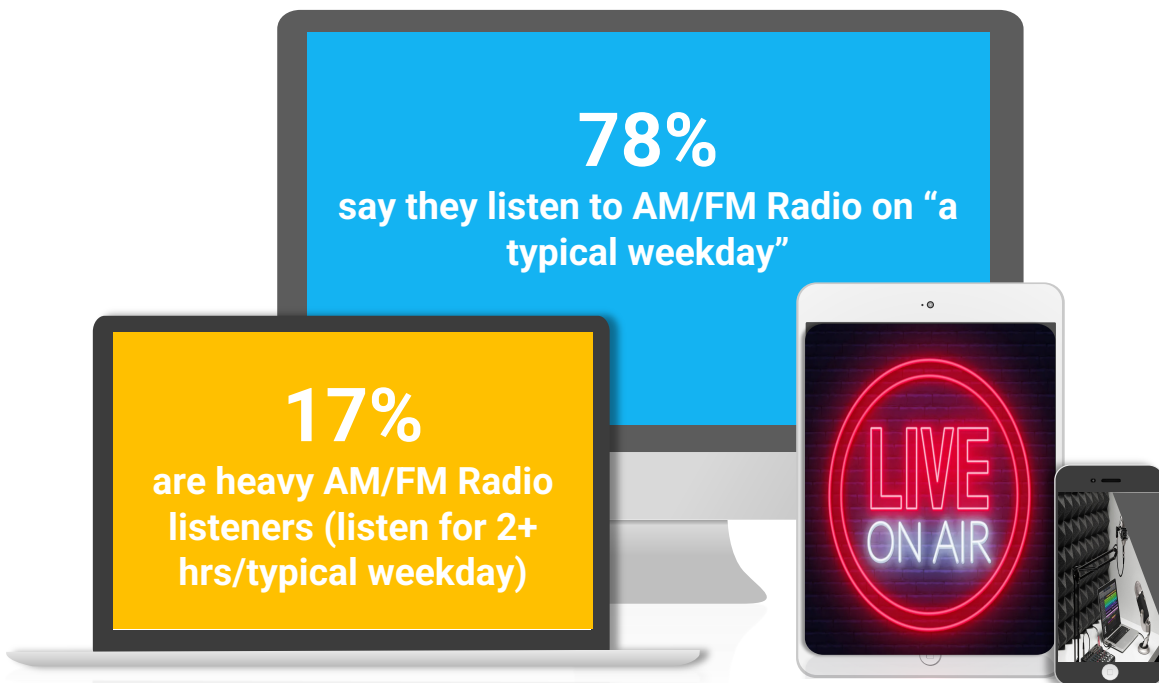
B3B. When is the most recent time, if ever, you listened to the following types of audio on ANY DEVICE? SUMMARY TABLE OF PAST WEEK

Base: Canadians 18+ (n=4,171); 18-34 (n=1,195); 18-49 (n=2,123); 25-54 (n=2,319)

# Music streamers also listen to AM/FM Radio

Listeners to one type of audio  
are often heavy listeners to  
other types of audio.

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



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+ who listened to music streaming service/YouTube for Music in past week (n=2,053) past month

# Streamers use AM/FM Radio to connect

Convenience and connecting to the here and now is why 17% of music streamers say they still tune AM/FM 2+ hours “in a typical weekday.”

Why are many music streamers also heavy AM/FM Radio listeners?

	Easy   Convenient	Connecting to now	Personal connection	Ambient connection
It's free	66%			
It's convenient	57%			
To get practical info - traffic, weather, advertising		54%		
To hear the latest news		54%		
To listen while I'm working or doing other things				50%
To hear what's happening in general		50%		
To keep me company			39%	
For the local connection		38%		
For the personalities, the human connection			33%	
To hear new music I wouldn't hear otherwise		24%		
To put me in a good mood				23%

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'/'Streamed YouTube For Music' In Past Month AND Listen To Radio Typical Weekday 2+ hrs/day (n=503)

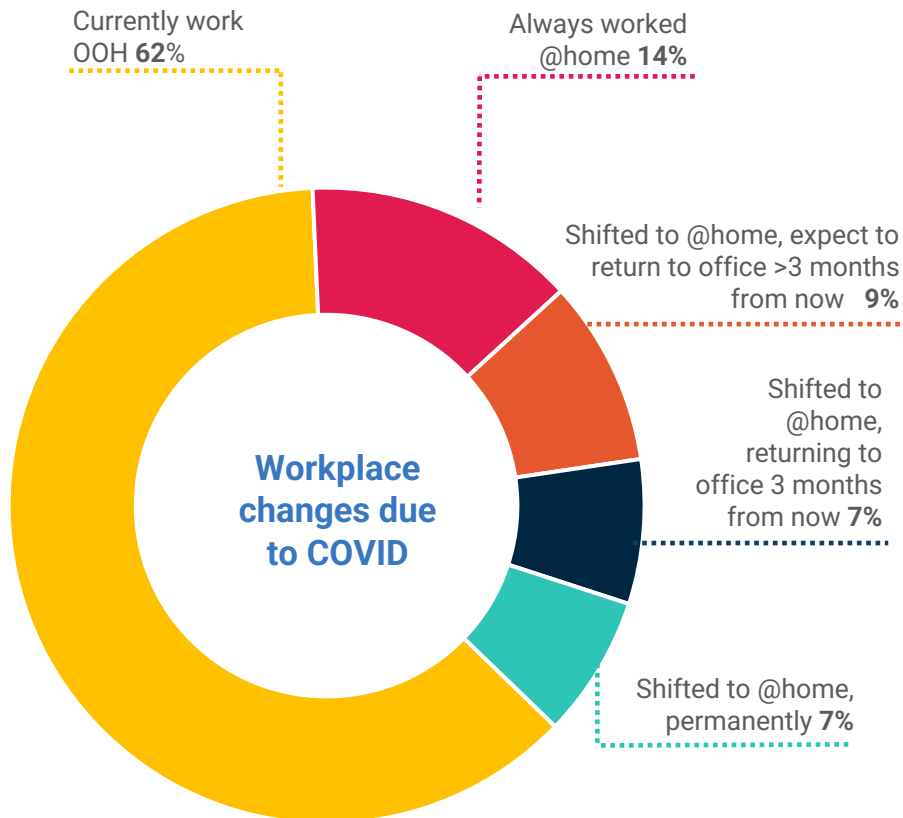


# On The Road Again

Canadians are getting back in their cars, where AM/FM rules all audio choices.

# Working Canadians are returning to the commute

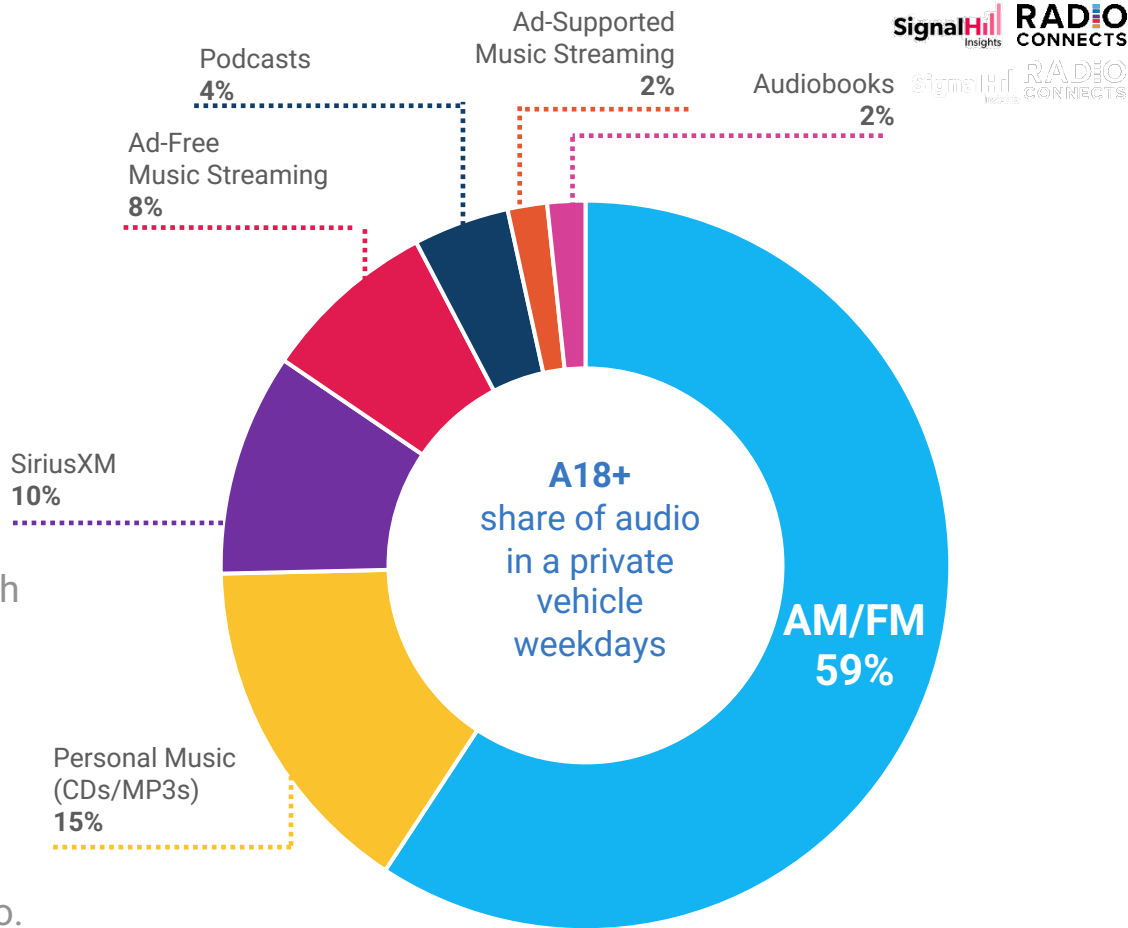
More than 6-in-10 Canadians are currently working away from their homes. Only 7% say they have made a permanent change to working from home.



COVID\_1\_2. The ways that Canadians work, shop and socialize changed dramatically since the arrival of COVID-19. Please select the options below that best represent your employment situation before the pandemic and currently. COVID\_2. You said that you worked primarily OUT OF THE HOME prior to the pandemic, but are working from home now. When, if ever, do you expect to be working out of the home again? Base: Canadians 18+ who are currently employed (n=2,464)

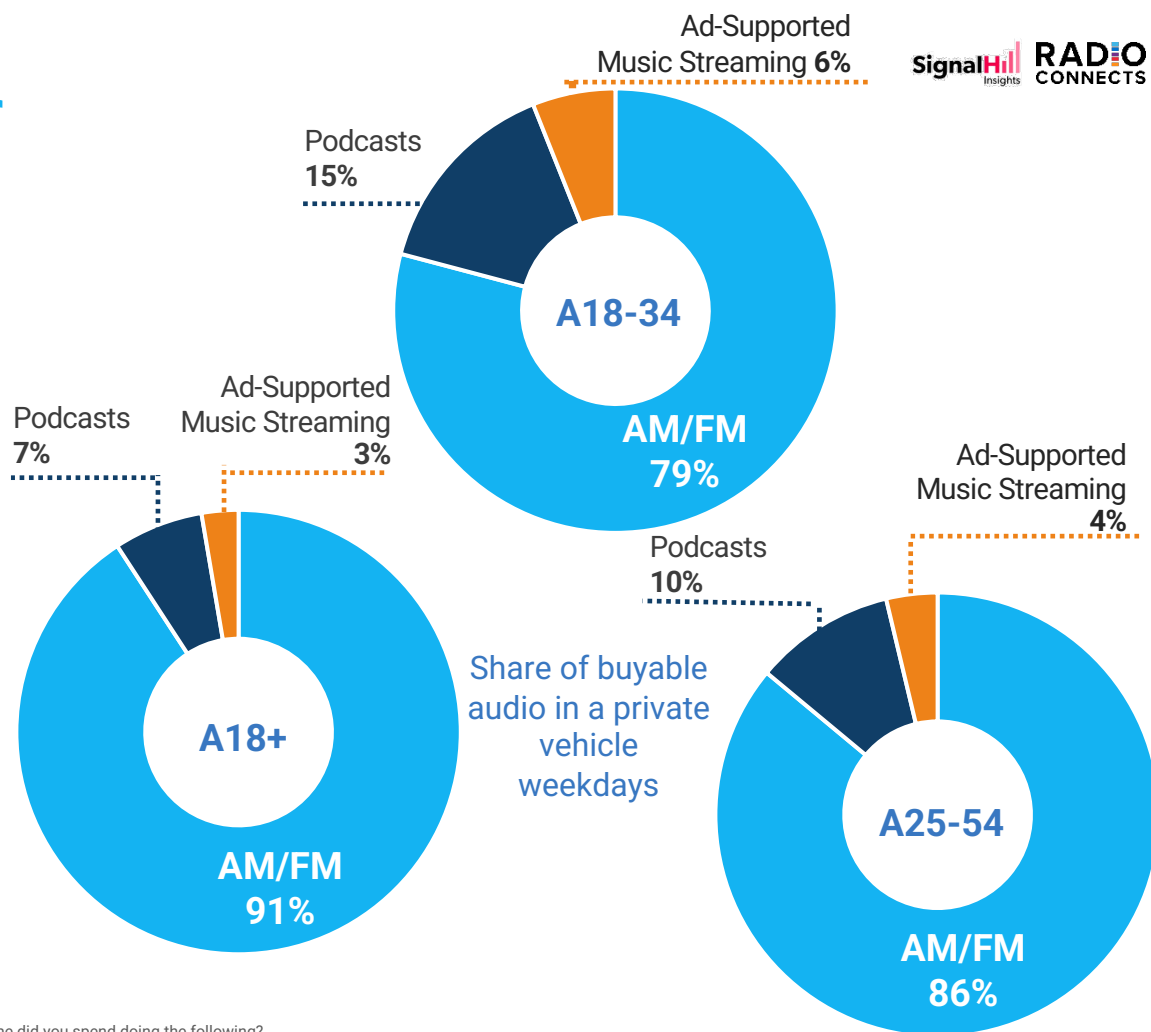
# AM/FM Radio provides the soundtrack for in-car listening

When Canadians get in the car, they reach for the radio. And, as the only type of audio that turns on automatically when you turn on your car, among Canadian adults who spent at least some time yesterday in a private vehicle, AM/FM dominates share of time spent with audio.



# AM/FM the clear choice to catch consumers on the go

AM/FM commands more than 9 out of every 10 hours of in-car audio available to advertisers.

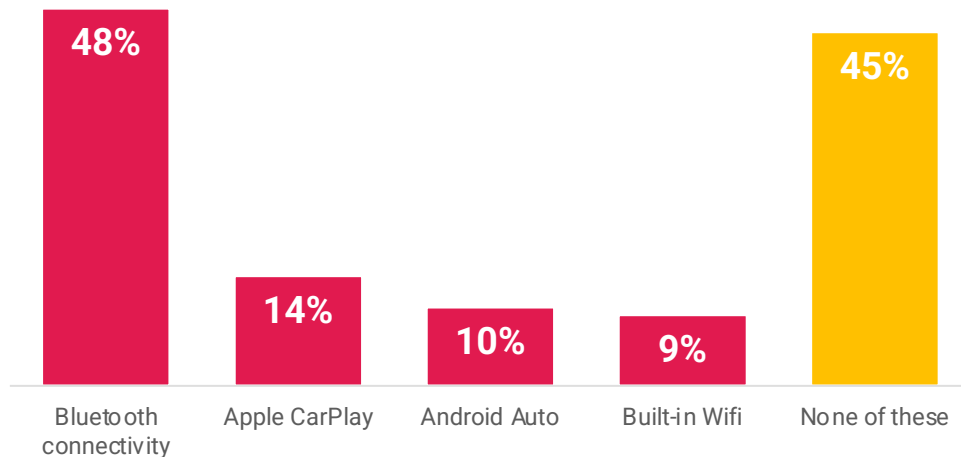


# Despite assumptions to the contrary, not all cars are “connected”



While nearly half of Canadians have a vehicle in the household with Bluetooth connectivity, other types of in-car technology are less prevalent.

Connectivity in Canadian vehicles

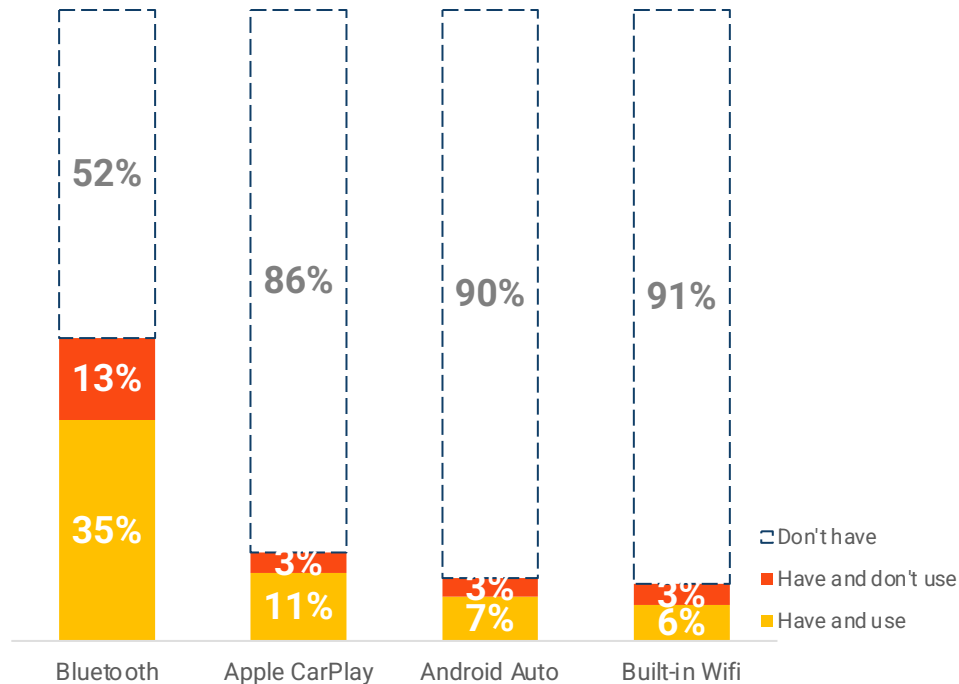




# Owning a “connected” vehicle doesn’t mean using its connectivity

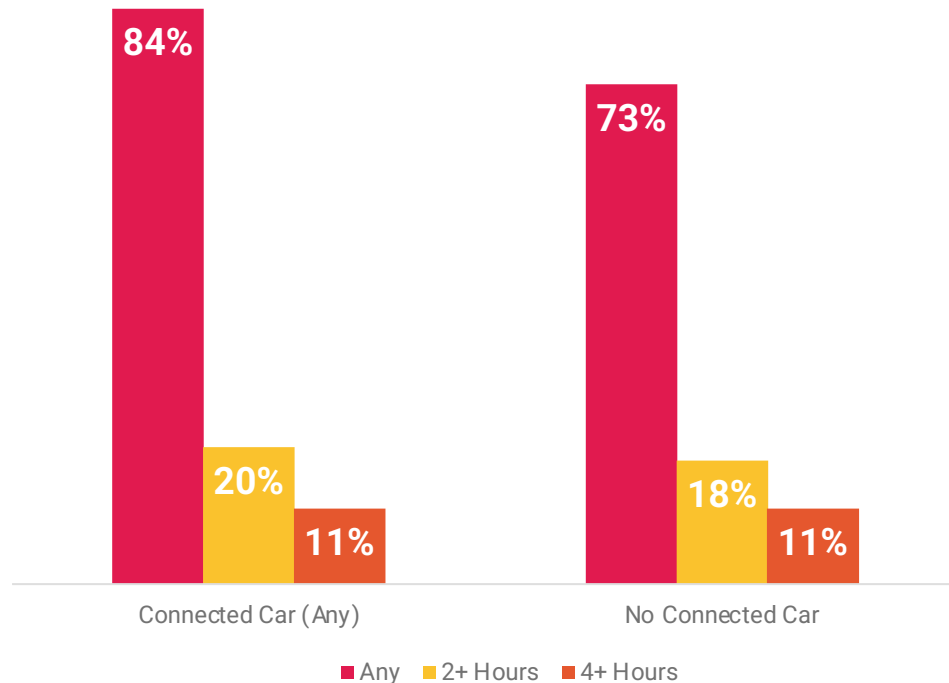
Use of connected technologies in the car is not universal among those who have them.

Type of connectivity in Canadian vehicles



Connected car  
owners are more  
likely to use  
AM/FM “on a  
typical weekday”

Time Spent with AM/FM on “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+ in household with a connected car (n=2,642); without a connected car (n=1,709)



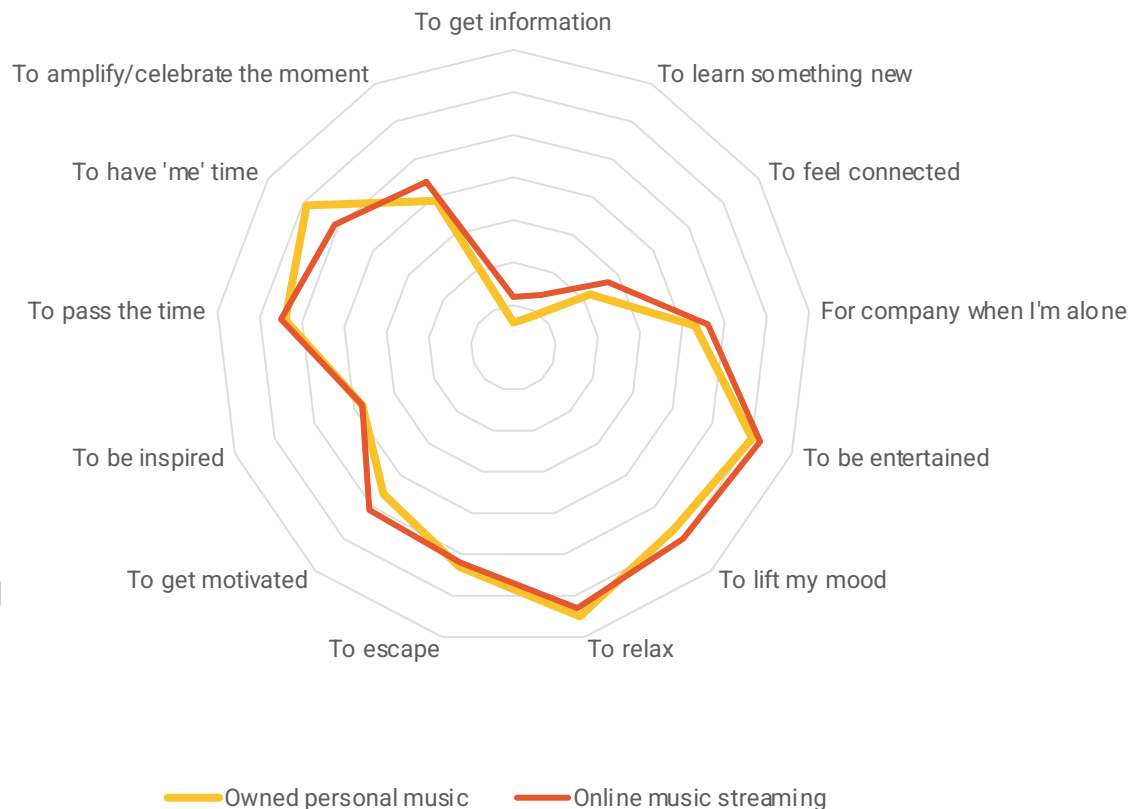
# Making Connections

Not all audio is the same when it comes to delivering against the different need states of consumers.

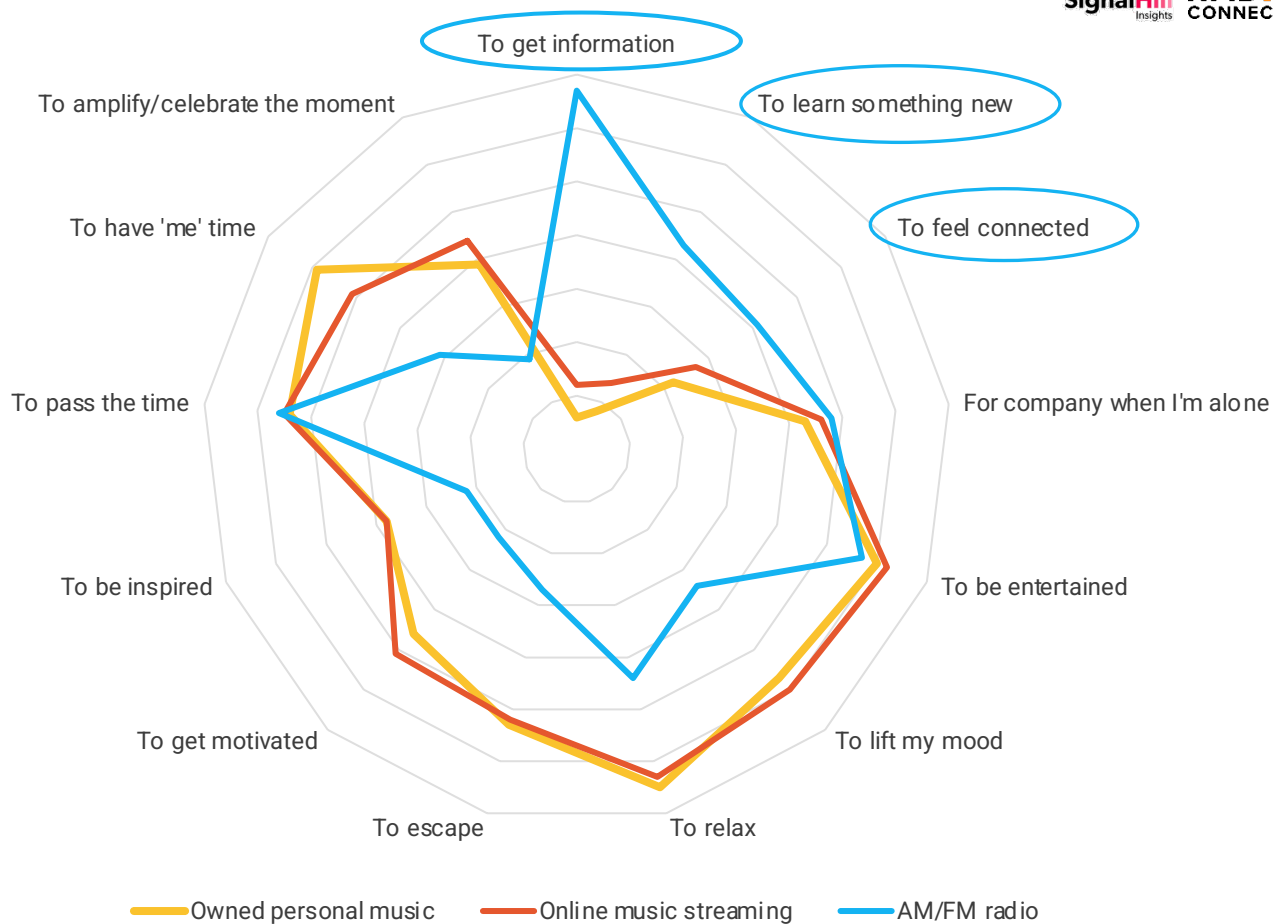
# Music streaming services and owned personal music satisfy the same need states



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



# Radio connects with listeners

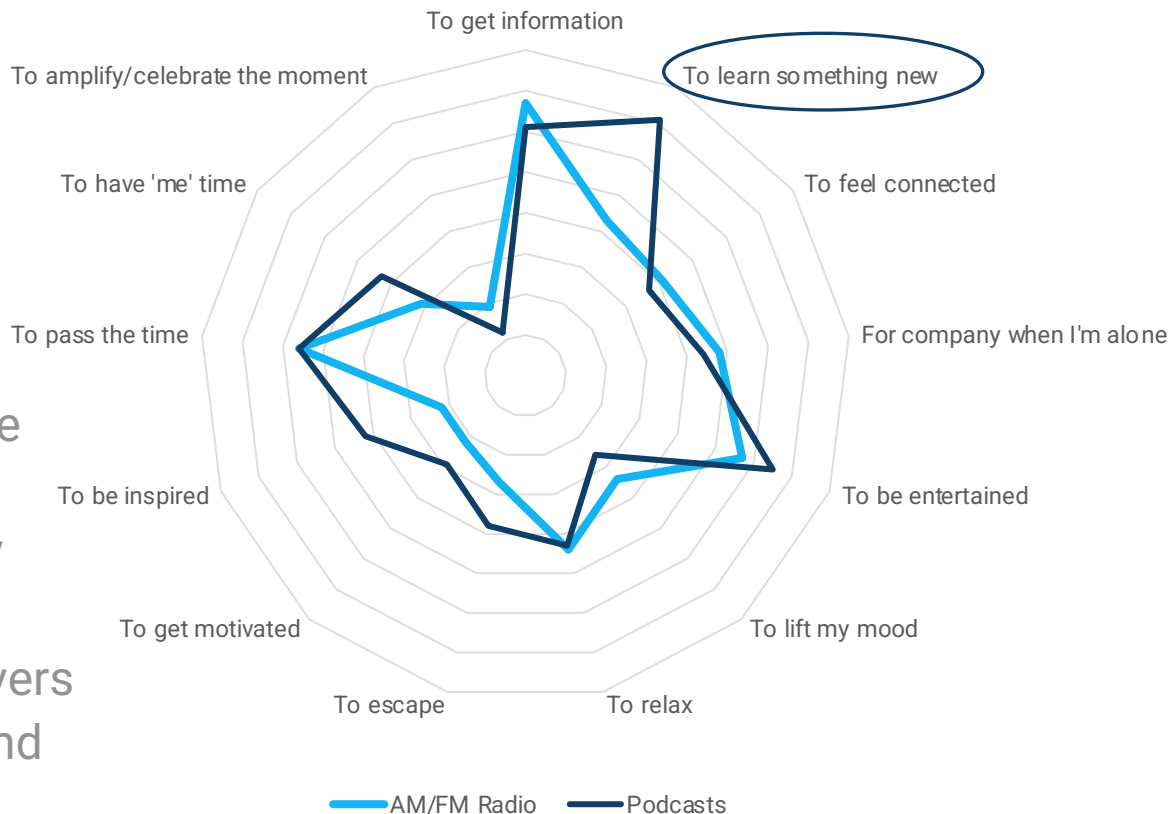


Radio meets a distinct set of needs from music listening, both informing and entertaining its listeners, while also providing an emotional connection.

# Podcasts and AM/FM meet similar needs



Radio and podcasts offer some key points of differences. Podcasts help listeners satisfy their need to learn new things, while radio more uniquely delivers information, companionship and mood elevation.





# Radio Delivers for Advertisers

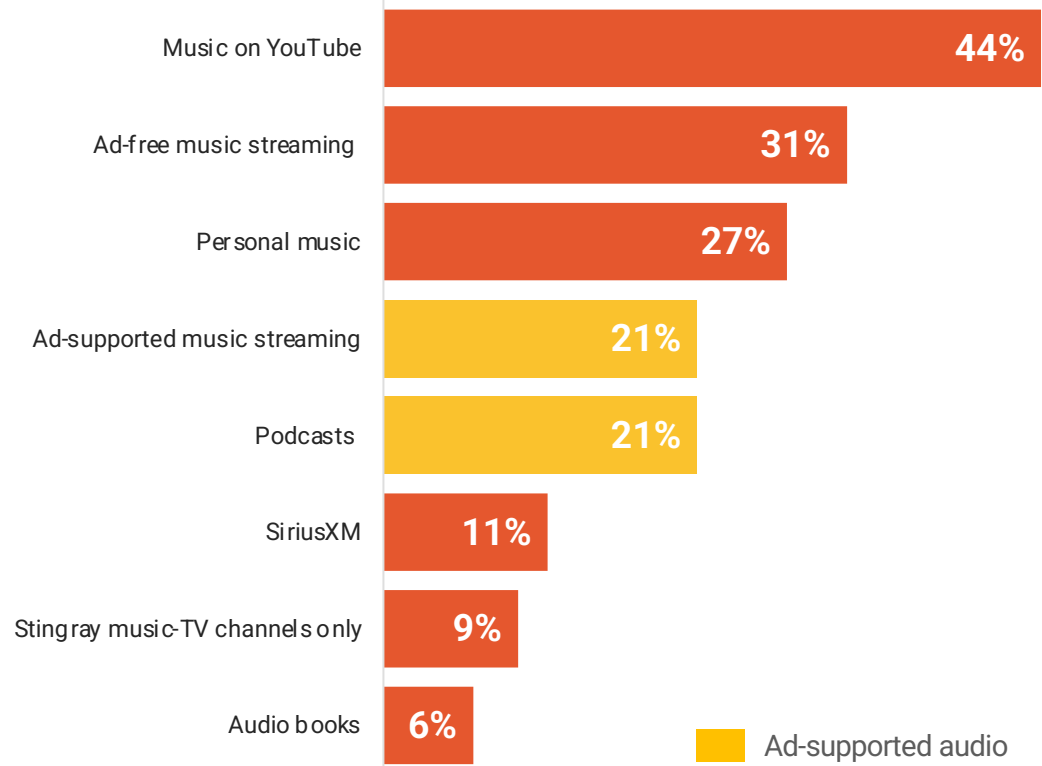
For advertisers building an audio strategy, AM/FM Radio is the reach machine, delivering unsurpassed audiences at scale to listeners that are engaged, attentive and ready to spend.

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

AM/FM Radio is the dominant platform for advertising reach, reaching 86%\* of A25-54 each week.

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

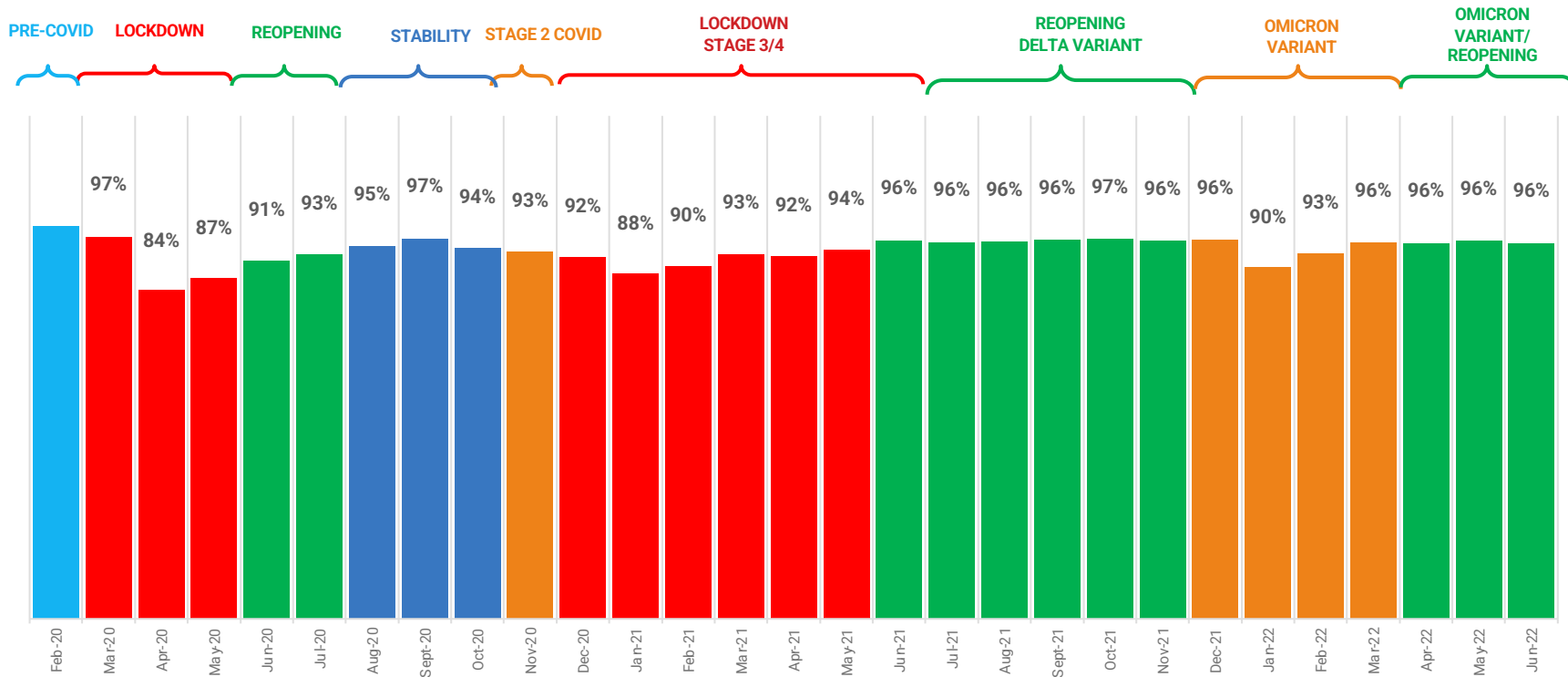
Listened in Past Week A25-54:



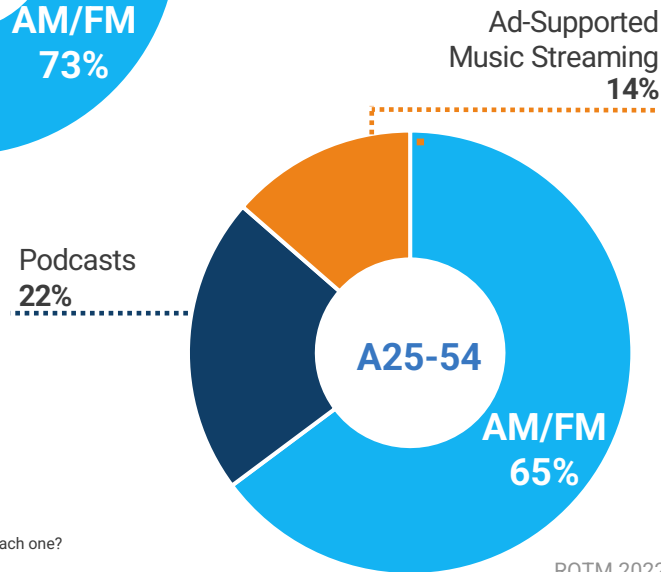
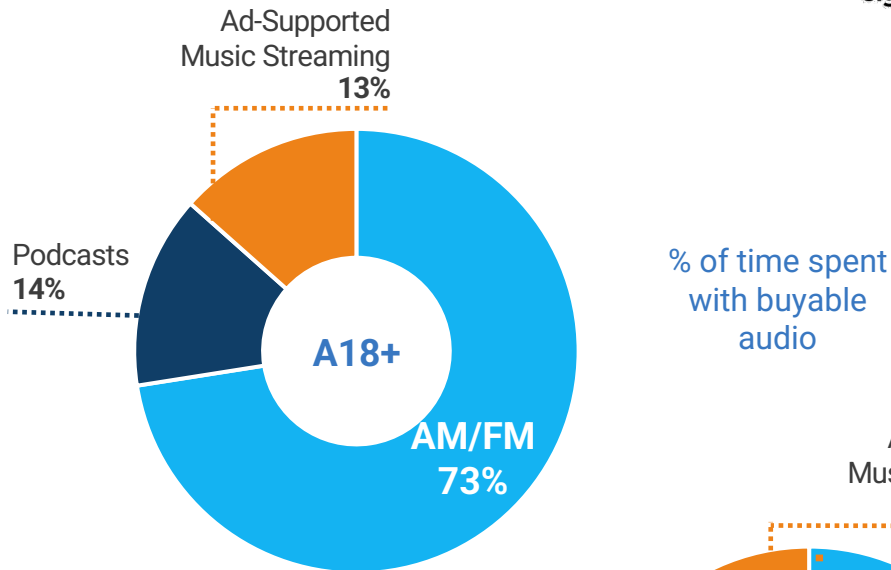


# Radio's weekly reach now 96% of February 2020

PPM Average weekly come in February 2020 compared to June 2022

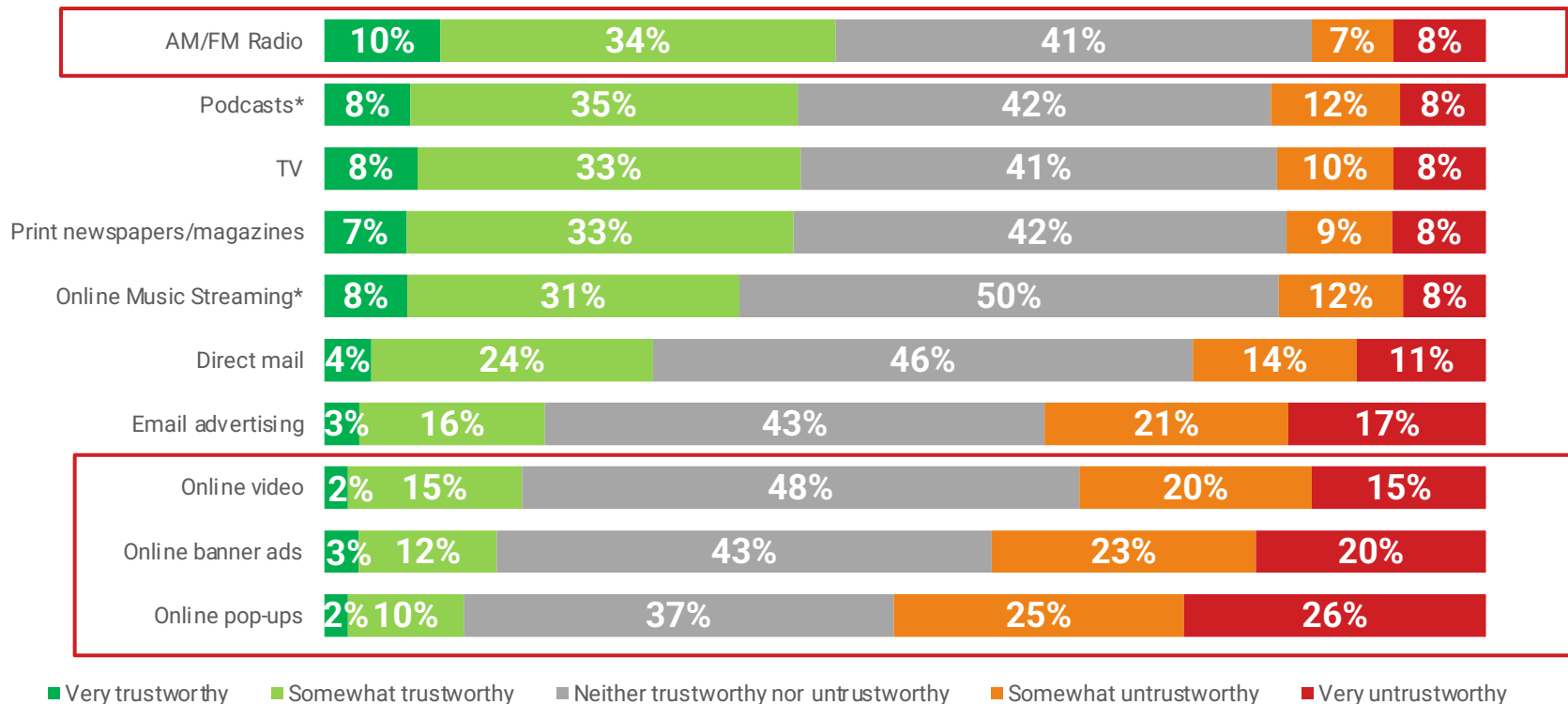


# AM/FM Radio is the clear choice for audio that targets audiences at scale



# Ads on AM/FM Radio the most trusted

How trustworthy would you say the ads are that you may see or hear in each of the following places?

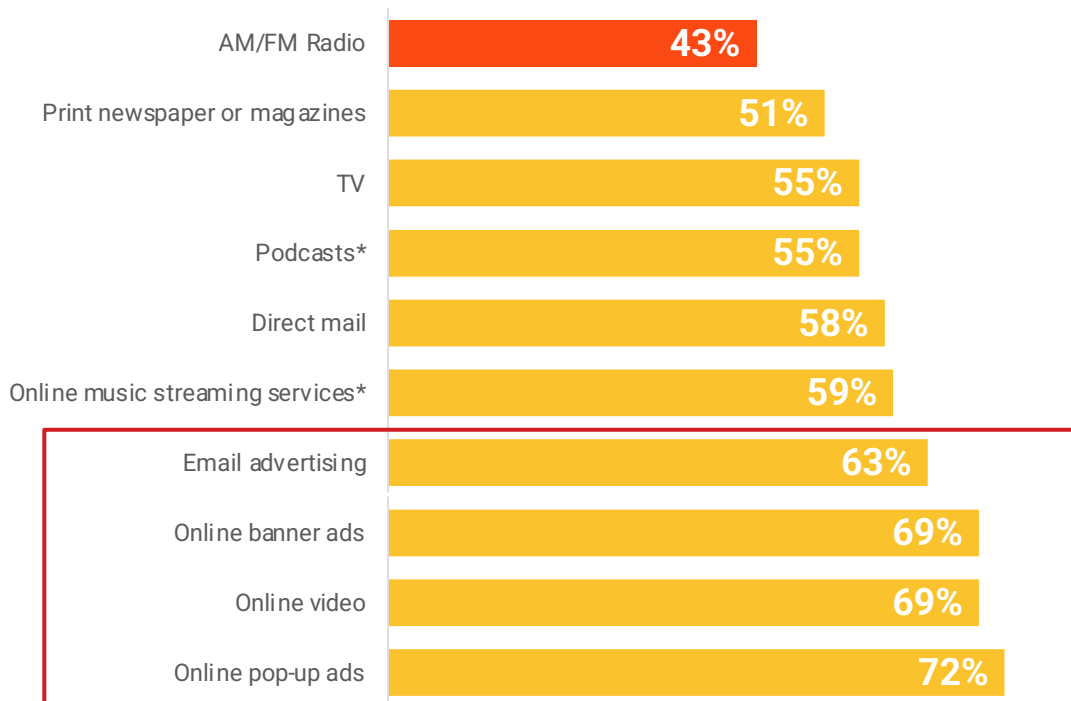


AD\_TRUST\_1. How trustworthy would you say the ads are that you may see or hear in each of the following places?  
Base: Canadians 18+ (n=4,171); \*of those who use Online music streaming services (n=1,198) and podcasts (n=1,188)

# Ads on AM/FM Radio the least avoided

Online ads are the most avoided of all media, while AM/FM Radio is the least—the only media with fewer than 50% saying they avoid the ads all or most of the time.

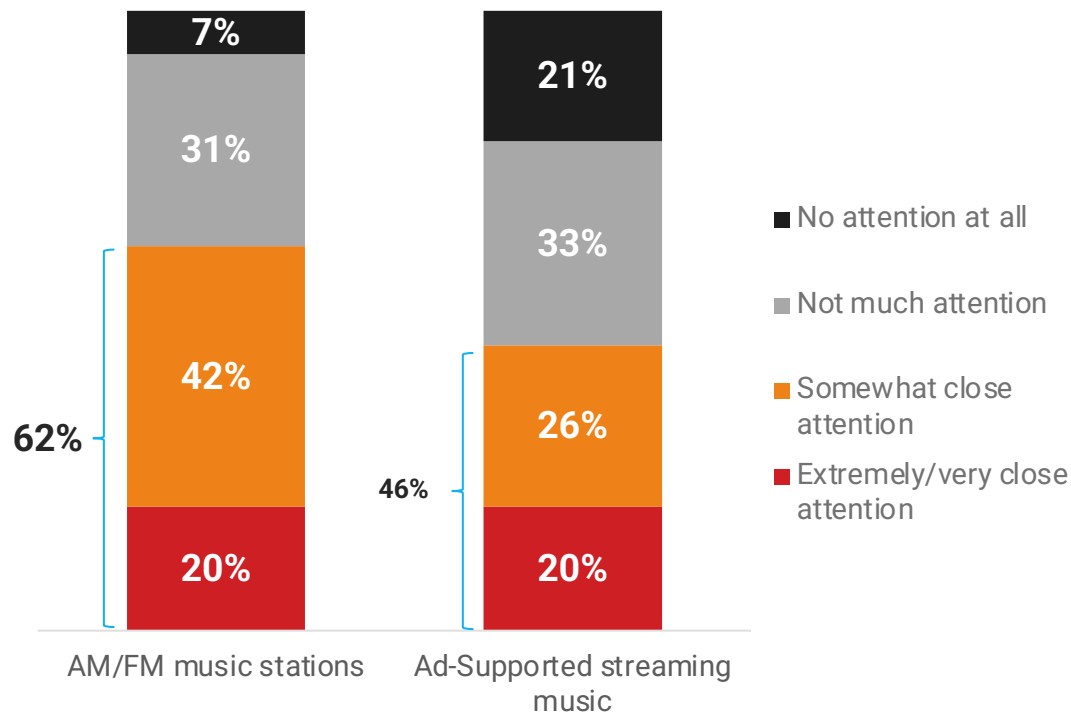
## Ads that are avoided most/ all of the time



# The Attention Gap: AM/FM Music Stations vs. Ad-Supported Music Streaming

Listeners to AM/FM music stations say they pay more attention to what's between the songs on AM/FM than their counterparts do when they listen to ad-supported music streaming services.

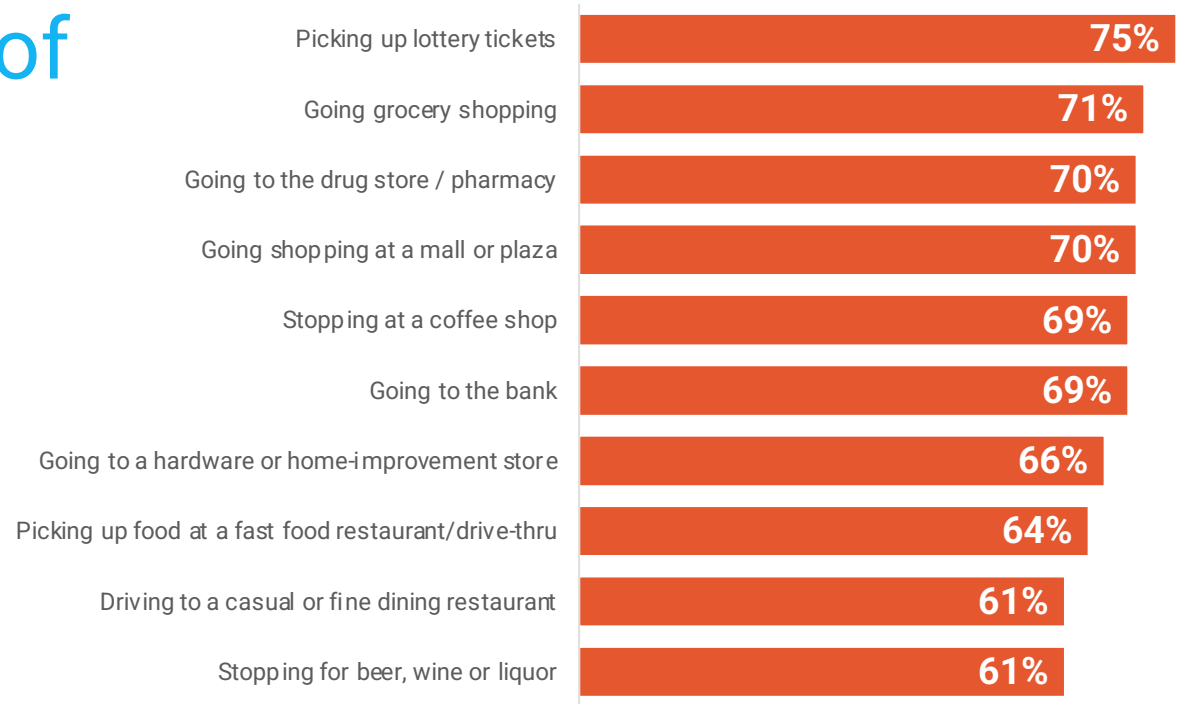
How much attention do you pay to what is being said between the music on the following?



# AM/FM Radio reaches listeners on the last mile of the path to purchase

Most Canadians listened to AM/FM Radio while using their private vehicle for their shopping trips yesterday.

Were you listening to AM/FM radio in the car while doing or going to this yesterday?



# Canadians are returning to in-store shopping with AM/FM listeners leading the way.

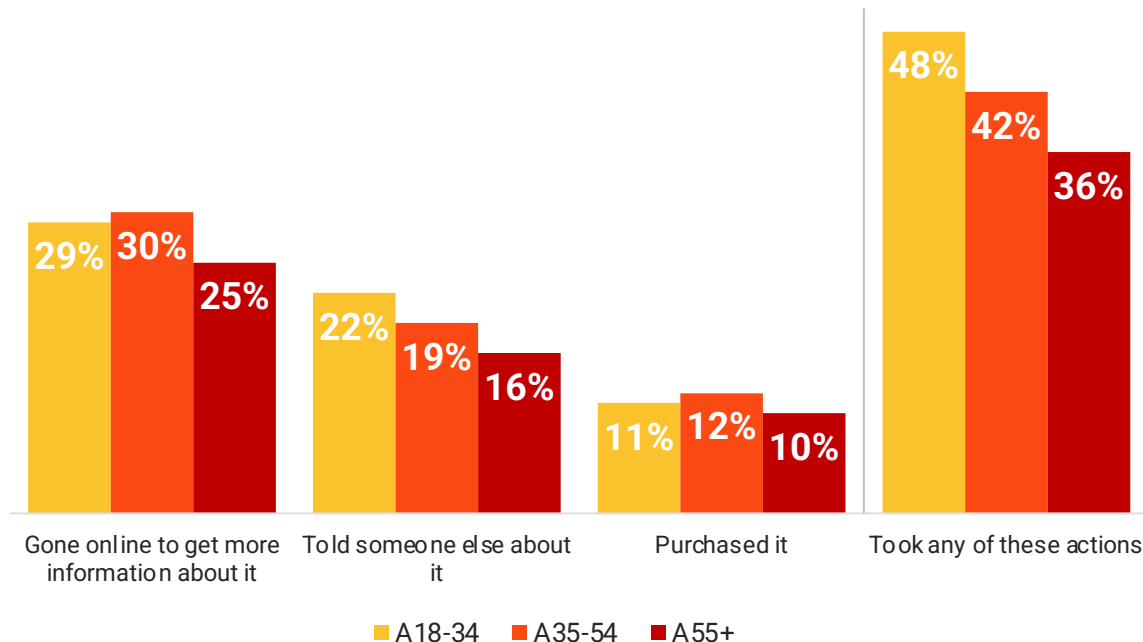
Thinking of all the shopping you plan to do over the next two months, do you expect to be doing:



# Hearing ads on AM/FM Radio motivates action

Canadians—especially  
younger demos —take action  
after hearing ads on AM/FM  
Radio.

Actions taken after hearing ad on AM/FM





# Key Takeaways

01

AM/FM Radio continues to dominate share of audio among Canadian adults. Nearly 3 out of every 4 hours spent with audio available to advertisers are spent with AM/FM Radio.

02

Listening to AM/FM Radio is particularly strong in daytime hours when screens are off, and listeners are out and about, ready to spend.

03

A growing proportion of AM/FM listening is going to AM/FM streaming, making radio a significant player in the digital audio arena. In fact, AM/FM streaming share is equal to ad-supported Spotify. This allows AM/FM Radio to offer advertisers the benefits of addressability and attribution of digital audio.

04

Growth of on-demand music streaming, especially ad-supported streaming, appears to have plateaued. Ad-supported listening continues to account for less than one-third of daily listening to Spotify.

05

As Canadians get back on the road, they are turning to AM/FM Radio, accounting for more than a 90% share of listening to ad-supported in-car audio consumption.

06

Despite the widespread availability of in-car infotainment technology, Canadians continue to value having AM/FM Radio available as their in-car companion. Canadians in connected cars spend even more time with AM/FM than other Canadians.

07

AM/FM Radio satisfies a unique set of need states for Canadians, while music streaming serves essentially the same needs as owned personal music.

08

Unlike music listening services, AM/FM Radio is used by Canadians to be informed and entertained as well as feeling connected.

09

AM/FM Radio retains the pole position for audio, delivering unparalleled reach, with a wide lead in share of listening allowing advertisers to target key demos at scale.

10

As a lean-in medium, AM/FM Radio also commands attention for advertisers. With ads that are highly trusted and least likely to be avoided, ads heard on AM/FM Radio motivate consumer action across all demos.



# Thank you

For more information please contact:

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

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