



CANADIAN CONSUMERS AND RADIO: LESSONS FROM COVID-19

February 2021

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INTRODUCTION

- Solutions Research Group Consultants Inc. (SRG) is pleased to present to CAB the results of the Canadian Consumers and Radio: Lessons from COVID-19 study
- SRG conducted 1,000 interviews with Canadians aged 12 and older in December, prior to Christmas and as well in early January in all Canadian provinces in both official languages
- The main objective of the research was to collect original, qualitative and quantitative information on Canadian consumers' media habits in the current environment, more specifically:
 - Understand consumer perceptions of shifts in media and entertainment choices
 - Situate radio in the media/digital space against a background of fast-growing digital options and new digital and at-home behaviours emerging due to pandemic lockdowns
 - Quantify the WFH (work from home) and vehicle use trends
 - Understand and quantify the pandemic's impact on radio and collect data that can be used to provide a basis for assumptions for future forecasts

TAKEAWAYS

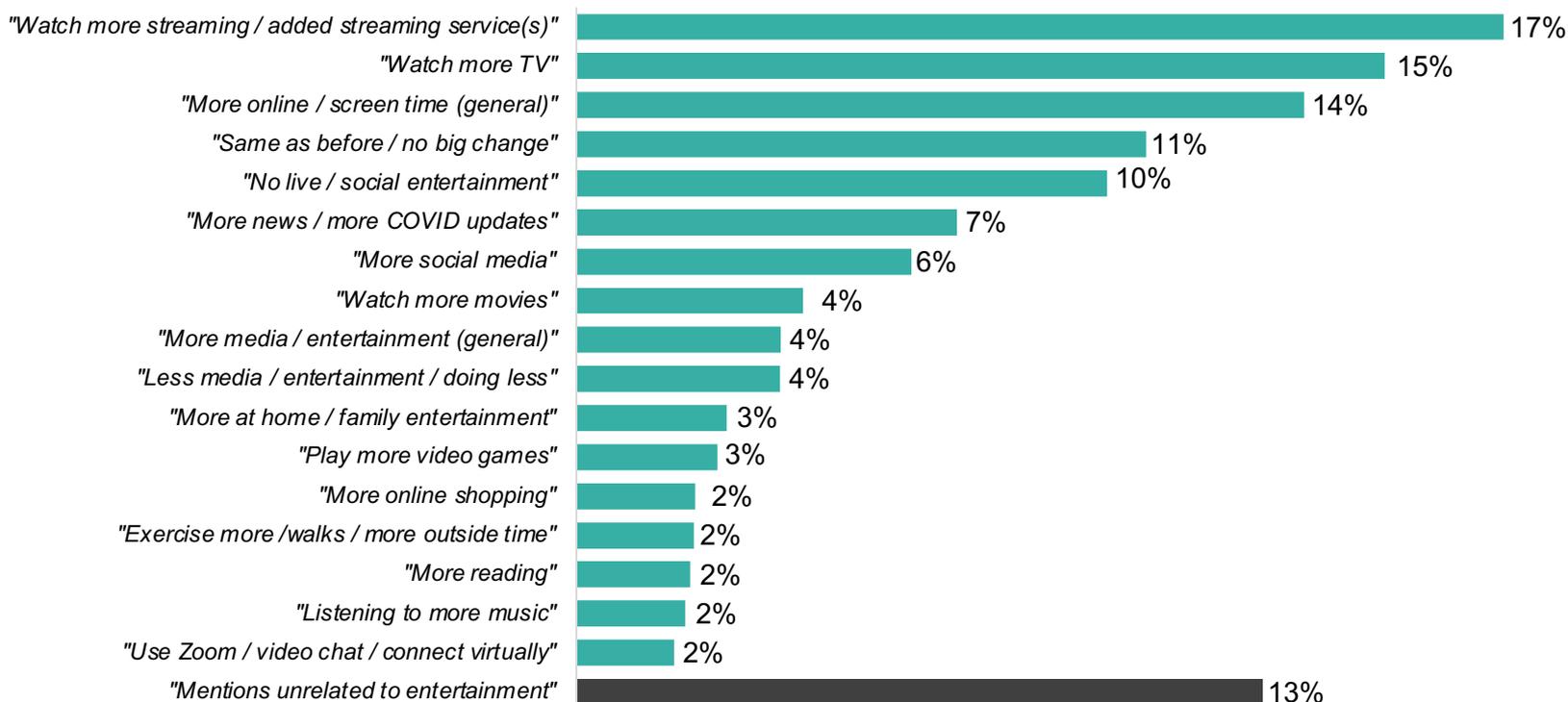
- 1 COVID-19 had a profound impact on media and entertainment behaviours of Canadian consumers towards more streaming, 'screen time' and social media; traditional TV also benefitted as Canadians spent more time than ever at home
- 2 Despite large shifts in behaviour, AM/FM radio was able to hold its own, ranking #5 out of 19 daily media/digital habits among Canadians overall; when it comes to local news, radio is considered as the #2 source, only next to TV
- 3 COVID-19 has had a material impact on radio tuning in terms of time spent – consumers are quick to identify spending less time in their cars as the main reason for this; less in-car time impacted adults' tuning but also their kids who are not driving with their parents as much – the sharpest decline has been among those who used to work outside the home but now are working from home
- 4 Among those listening to radio more during the pandemic compared to before, "keeping up with the pandemic" and news in general are most likely to be mentioned as reasons for tuning in as well as, of course, music
- 5 Notably, the time 'lost' by radio during the pandemic is not being replaced simply by other 'audio' options but rather by streaming video, social media, gaming and other new and existing competitive options
- 6 Quantifying the changes in the listening dynamics by location, 65% of those in the labour force were driving to work pre-pandemic and now this number is down to 45% — and employees are reporting uncertainty about return to work and in some cases talk about discussions around permanent shifts to working from home
- 7 77% of employers and 60% of employees who are working from home believe they will spend more than half of their time 'back at the office' once the pandemic ends; this suggests that the 'new normal' may end up being a smaller labour force at the workplace compared to pre-pandemic levels
- 8 Three-in-four Canadians believe this pandemic is not a 'one-time event' with passing impact but one that will impact their behaviours and habits on a long term basis – they project retaining some of the 'home-centred' and online-enabled behaviours of the lockdowns 'long after' the pandemic is over. This also means that some of the shifts in media behaviour will have staying power

COVID-19's Impact on Media Habits



By far the biggest shift in media and entertainment behaviour during the lockdown is more streaming and 'screen time,' according to Canadians' open-ended responses – only 11% said 'no big change'

Differences in entertainment, media and information consumption now compared to prior to COVID-19 – open-ended, multiple mentions



Base: 12+ respondents, excluding none/don't know (n=977), only responses of 2% or more shown; Question: *The COVID-19 pandemic created a number of shifts in how we live, including day-to-day habits because of the lockdowns. thinking of your entertainment, media and information consumption personally, what are the biggest differences NOW compared to prior to the start of the COVID-19 pandemic in early March 2020?*

COVID-19 was a boon for streaming services – it meant more viewing and new subscribers; traditional TV also benefitted significantly

Differences in entertainment, media and information consumption now compared to prior to COVID-19 – sample comments

“Watch more streaming / added streaming service(s)”



“I am using a lot more streaming services now and spending more time online, compared to prior to Covid.”

“Am watching Netflix since March 2020. Usually just watched shows and movies from cable TV. Netflix has given us more options and interesting TV series that were not available of cable TV.”

“I am binge watching lots of movies and Netflix series during this pandemic.”

“I am using online streaming services allot more, like YouTube, Netflix, Crave and Amazon Prime.”

“I am watching more streaming video through my Roku...prior to the Pandemic I rarely used it ..in fact it was not even used. It was put back into service during the Pandemic.”

“I never used to have time to watch much TV, but now I do so I bought a Netflix subscription and watch a lot of movies.”

“I think I'm more willing to buy the streaming services that I cut out of my budget to save money. Right now, streaming services and even renting Cineplex movies is one of my top priorities.”

“The biggest differences now are the streaming services that I have begun to pay for on a monthly basis, including Disney+ and Amazon Prime Video.”

“Watch more TV”



“We are spending more time at home. So we are watching more TV and movies. Spending more time on the Internet and social media.”

“No live entertainment, but much more TV, reading, and listening to music.”

“Spending more time watching Digital cable, streaming video and playing video games.”

“I am watching a lot more TV. Doing more online and in store shopping, talking more to friends and family. Spending a lot more time on my computer. Exercising more.”

“I spend all my time at home, so my entertainment is mostly television and social media. Before, entertainment included outings to restaurants, cinemas, etc.”

“Since Covid-19 in March 2020 I have had a lot more time on my hands, and more time in my home, so I have been spending more time watching TV and movies.”

“I have been working from home more, so I seem to spend more time watching TV than I used to.”

“I watch more television then I ever have in my life.”

“My family and I are spending much more time indoors watching movies on TV rather than going out and doing outdoor activities.”

“Watching more TV and video on demand and upgrading internet packages.”

Base: 12+ respondents, excluding none/don't know (n=977); Question: *The COVID-19 pandemic created a number of shifts in how we live, including day-to-day habits because of the lockdowns. thinking of your entertainment, media and information consumption personally, what are the biggest differences NOW compared to prior to the start of the COVID-19 pandemic in early March 2020?*

The biggest (and perhaps lasting) impact of the pandemic could be summed up by one respondent's comment: 'everything is more online'; social media use increased as well, Instagram to TikTok

Differences in entertainment, media and information consumption now compared to prior to COVID-19 – typical comments

"More online / screen time (general)"



"I am using the computer and TV more for entertainment, media, and information. Because of the lockdowns, I have not been attending theatres."

"I spend more time using my electronic devices (iPhone, iPad and laptop) than I did before the pandemic started. I also watch more TV now than before."

"Everything is more online - much more streaming or digital."

"Everything in the world is different. I consume more media online than ever before."

"A lot more reliance on technology so there's a lot more entertainment and information being consumed."

"Way more screen time."

"More social media"



"I use more social media and the Internet now compared to March 2020."

"I am on social media more now such as YouTube and Facebook."

"I am using social media platforms more than pre COVID."

"I have been using a lot more social media. Specifically on Instagram and TikTok."

"I make way more TikToks"

"I'm on social media way more now compared to before."

"More news / more COVID updates"



"Since March 2020 I have been watching the news media 100% more. I am just glued to the news, radio and any other type of strong sincere media."

"I am reading the news more since the COVID situation seems to evolve daily. My family is also consuming more online video."

"Have become a news junkie. Follow the latest on COVID-19 and politics daily."

"I have started watching much more news than ever before (and I watched a lot, before)."

I pay attention to the news a lot more. I watch less "entertainment" TV, and more fact-based programming."

"Watch more movies"



"I stay mostly at home not visiting friends. Grocery shopping less as possible. Just watching movies or spending time in social media."

"I am watching more movies at home and none in theaters."

"I watch movies a lot more."

"Watch movies at home more than before."

"We watch movies with my family at home."

Base: 12+ respondents, excluding none/don't know (n=977); Question: *The COVID-19 pandemic created a number of shifts in how we live, including day-to-day habits because of the lockdowns. thinking of your entertainment, media and information consumption personally, what are the biggest differences NOW compared to prior to the start of the COVID-19 pandemic in early March 2020?*

Younger Canadians describe the big changes during the pandemic as being more screen and social media time, while older Canadians (55+) are much more likely to identify a surge in their TV viewing

Differences in entertainment, media and information consumption now compared to prior to COVID-19 – open-ended, multiple mentions

	Total 12+ %	English-Speaking Canada %	Quebec %	12-24 %	25-54 %	55+ %
"Watch more streaming / added streaming service(s)"	17	19	13	15	19	16
"Watch more TV"	15	15	15	10	12	24
"More online / screen time (general)"	14	15	10	17	12	14
"Same as before / no big change"	11	10	12	8	9	16
"No live / social entertainment"	10	10	9	6	10	12
"More news / more COVID updates"	7	6	11	3	7	10
"More social media"	6	7	4	17	4	4
"Watch more movies"	4	4	4	3	4	5
"More media / entertainment (general)"	4	4	3	8	4	2
"Less media / entertainment / doing less"	4	3	6	4	5	1
"More at home / family entertainment"	3	3	2	3	3	2
"Play more video games"	3	3	2	4	3	1
"Mentions unrelated to entertainment"	13	12	15	15	16	7

Base: 12+ respondents, excluding none/don't know (n=977), only responses of 3% or more in total are shown; Question: *The COVID-19 pandemic created a number of shifts in how we live, including day-to-day habits because of the lockdowns. thinking of your entertainment, media and information consumption personally, what are the biggest differences NOW compared to prior to the start of the COVID-19 pandemic in early March 2020?*

Where is Radio in the new Media & Digital Landscape?



When we rank 19 media and digital behaviours among Canadian consumers in the age of COVID-19, top spot now goes to social media followed by video streaming (free & paid), TV and AM/FM radio

Media & digital habits – ranks based on % reporting using daily

Rank			% Using Daily	% Using Monthly	Rank			% Using Daily	% Using Monthly
1	Access social media such as Facebook, Instagram, Twitter, Tiktok or Snap		65%	91%	11	Browse or shop online or on mobile including from places like Amazon, eBay, Walmart or other retailers		14%	88%
2	Stream video content from a <u>free service</u> such as YouTube, Twitch, Vimeo, TikTok or similar		44%	86%	12	Play multiplayer video games over the Internet with others		14%	42%
3	Watch TV shows or movies live on TV or delayed via a PVR or stream from a TV provider website, app or service		39%	76%	13	Use Facetime, Skype, Zoom, Google meet or similar video calling apps to connect with <u>friends and family</u>		14%	71%
4	Stream video content from a <u>paid subscription</u> streaming service such as Netflix, Amazon Prime Video...or similar		34%	76%	14	Use navigation apps while driving, like Maps, Waze and similar		9%	60%
5	Listen to an AM or FM radio station in the car, at home, work, using a radio, via a mobile device...or app like TuneIn		30%	82%	15	Stream or download podcasts from any source		8%	44%
6	Use free audio streaming sites such as YouTube Music...or free, ad-supported versions of paid music streaming sites		27%	71%	16	Participate in a personal training, fitness class, yoga, or similar using a video app or online		6%	31%
7	Play video games on a handheld device or your phone		24%	64%	17	Stream or listen to audiobooks		6%	30%
8	Read books or e-books, newspapers or magazines online, on a tablet, a mobile device or in printed form		23%	68%	18	Listen to satellite radio such as SiriusXM		5%	13%
9	Use paid music streaming sites including Spotify, Apple Music, YouTube Premium, Deezer, Tidal and similar		20%	44%	19	Order food using apps like UberEats, Just Eat, Skip the Dishes		4%	42%
10	Use Facetime, Skype, Zoom, Google meet or similar video calling apps for <u>work-related meetings and calls</u>		15%	63%					

Base: 12+ respondents (n=1000); Question: *How often do you do each of the following personally?*

Radio ranks in the top 5 for A25-54 and A55+ as a 'daily' habit but is ranked lower (#12) among young Canadians 12-24 who rank streaming and gaming ahead of radio; AM/FM radio is ranked #4 in Quebec

Media & digital habits – ranks based on % reporting using daily

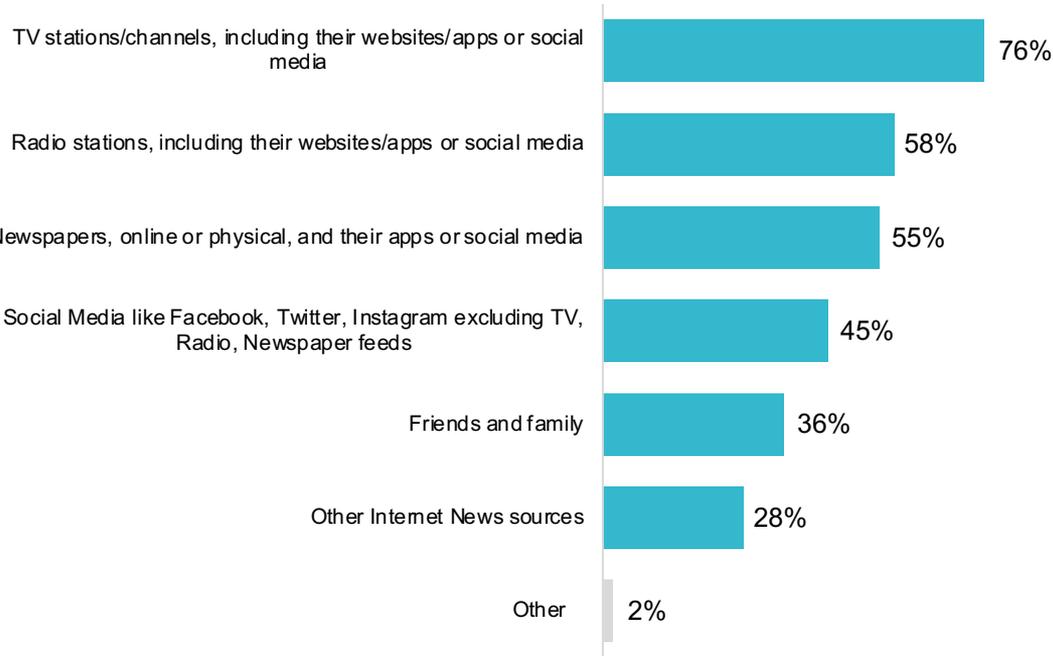
	Total 12+ RANK	English-Speaking Canada	Quebec	12-24	25-54	55+
Access social media such as Facebook, Instagram, Twitter, Tiktok or Snap	1	1	1	1	1	1
Stream video content from a free service Stream video content from a <u>free service</u> such as YouTube...or similar	2	2	2	2	2	6
Watch TV shows or movies live on TV or delayed via a PVR or stream from a TV provider website, app or service	3	3	3	9	4	2
Stream video content from a paid subscription streaming service	4	4	5	5	3	5
Listen to AM or FM radio in the car, at home, at work, using a radio, mobile device, smart speaker, or via an app	5	5	4	12	5	3
Use free audio streaming sites or free, ad-supported versions of paid music streaming sites	6	6	6	3	6	8
Play video games on a handheld device or your phone	7	7	9	6	7	7
Read books or e-books, newspapers or magazines online, on a tablet, a mobile device or in printed form	8	8	7	14	8	4
Use paid music streaming sites including Spotify, Apple Music, YouTube Premium, Deezer, Tidal and similar	9	9	8	4	9	13
Use Facetime, Skype, Zoom, Google meet or similar video calling apps for work-related meetings and calls	10	12	10	10	11	10
Browse or shop online or on mobile	11	10	13	11	10	11
Play multiplayer video games over the Internet with others	12	11	12	7	13	12
Use Facetime, Skype, Zoom, Google meet or similar video calling apps to connect with friends and family	13	13	11	8	12	9
Use navigation apps while driving, like Maps, Waze and similar	14	14	14	13	15	17
Stream or download podcasts from any source	15	15	15	17	14	15
Participate in a personal training, fitness class, yoga, or similar using a video app or online	16	16	17	16	16	18
Stream or listen to audiobooks	17	17	16	15	17	16
Listen to satellite radio such as SiriusXM	18	18	19	19	18	14
Order food using apps like UberEats, Just Eat, Skip the Dishes	19	19	18	18	19	19

Base: 12+ respondents (n=1000); Question: *How often do you do each of the following personally?*

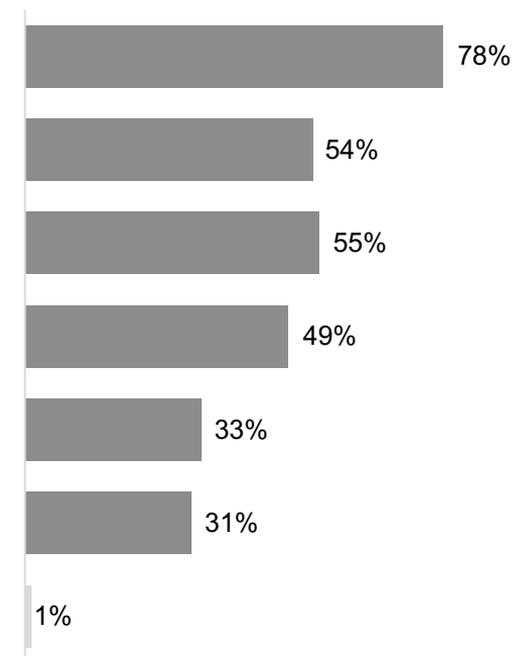
Radio is the #2 source identified for local news by 58% of Canadians, next to TV at 76%, when respondents are reminded to exclude traditional media feeds in their social media streams

Top sources for local news and national or international news – total mentions

Local News



National or International News



Base: 12+ respondents (n=1000); Question: *Personally, where do you get your ...? Please indicate your top 3 sources.*

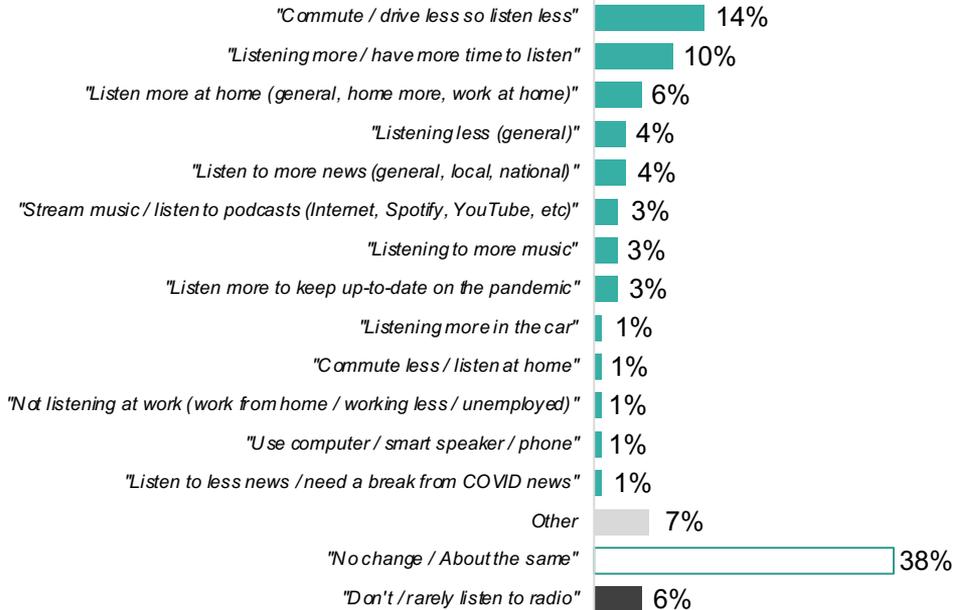
COVID-19's Impact on Radio



On top-of-mind basis, the 'biggest difference' in radio listening is consumer mentions of 'drive less so listen less'; where there is more listening, it tends to be at home and to news

Differences in time spent listening to am or FM radio now compared to prior to the start of the covid-19 pandemic – open-ended categorized, multi mention

12+ Respondents



By Region and Age

	English-Speaking Canada	Quebec	12-24	25-54	50+
"Commuting / drive less so listen less"	15%	11%	18%	14%	12%
"Listening more / have more time to listen"	10%	11%	10%	10%	9%
"Listen more at home (general, home more, work at home)"	6%	7%	7%	6%	6%
"Listening less (general)"	5%	3%	10%	4%	2%
"Listen to more news (general, local, national)"	4%	3%	2%	4%	4%
"Stream music / listen to podcasts (Internet, Spotify, YouTube, etc)"	3%	3%	6%	2%	2%
"Listening to more music"	2%	3%	4%	2%	2%
"Listen more to keep up-to-date on the pandemic"	2%	3%	1%	2%	4%
"Listening more in the car"	2%	—	2%	2%	—
"Commuting less / listen at home"	1%	1%	—	2%	1%
"Not listening at work (work from home / working less / unemployed)"	2%	—	1%	2%	—
"Use computer / smart speaker / phone"	1%	1%	1%	1%	1%
"Listen to less news / need a break from COVID news"	1%	1%	—	2%	—
Other	7%	8%	8%	8%	6%
"No change / About the same"	36%	43%	24%	38%	45%
"Don't / rarely listen to radio"	6%	4%	10%	4%	6%

Base: 12+ respondents, excluding none/don't know (n=950); Question: *Thinking of the way you listen to AM or FM radio stations, what are the biggest differences in how you spend your time now compared to prior to the start of the COVID-19 pandemic in early March 2020? Please feel free to tell us about any change in the amount, location or the type of listening.*

Lockdowns are impacting adults' tuning because of less time in the car but some are finding radio time in the home

Differences in time spent listening to am or FM radio now compared to prior to the start of the covid-19 pandemic – open-ended categorized, multi mention – typical comments

“Commute / drive less so listen less”



“I spend less time listening to the radio because I spend less time driving because I am at home all the time.”

“Much less now that I rarely go out in the car, basically once a month to collect any prescription I need to or visit my Dentist/Optician once every 6 months.”

“I used to listen to radio more, when I was in the car more. But since covid19 I have listened less. Because when I'm at home I prefer Spotify since it's more personalized to my taste.”

“I barely ride in the car at all anymore and bike to school instead or take the bus, so its very rare that I would listen to a radio station in the car.”

“I definitely am not in the car driving places as much so I don't listen to the radio nearly as often as I did before COVID.”

“I used to spend more time listening to radio on my way to school while in the car. Now, I no longer attend school in person so I no longer listen to the radio.”

“Listening less because most of the time i listen to radio was when commuting to and from work but right now I am working from home.”

“I am spending less time in the car so I don't listen to the radio as much as I would need it for traffic and weather.”

“I spend less time listening to the radio because I have been using a car much less and that's the only time I listen to the radio.”

“Listening more / have more time to listen”



“I am listening to it more than usual which is none before. Also I am now listening to music at home more often to just do house work or work.”

“I have more time to listen to music now.”

“I have the radio on more. It keeps me company.”

“Before Covid I barely listened to am or FM radios but recently I have been listening because I have nothing else better to do.”

“I have changed my usual station and listen to more than usual.”

“With more time at home, I have been listening to more radio compared to before the COVID-19 pandemic.”

“I listen to more radio now as compared to before Covid.”

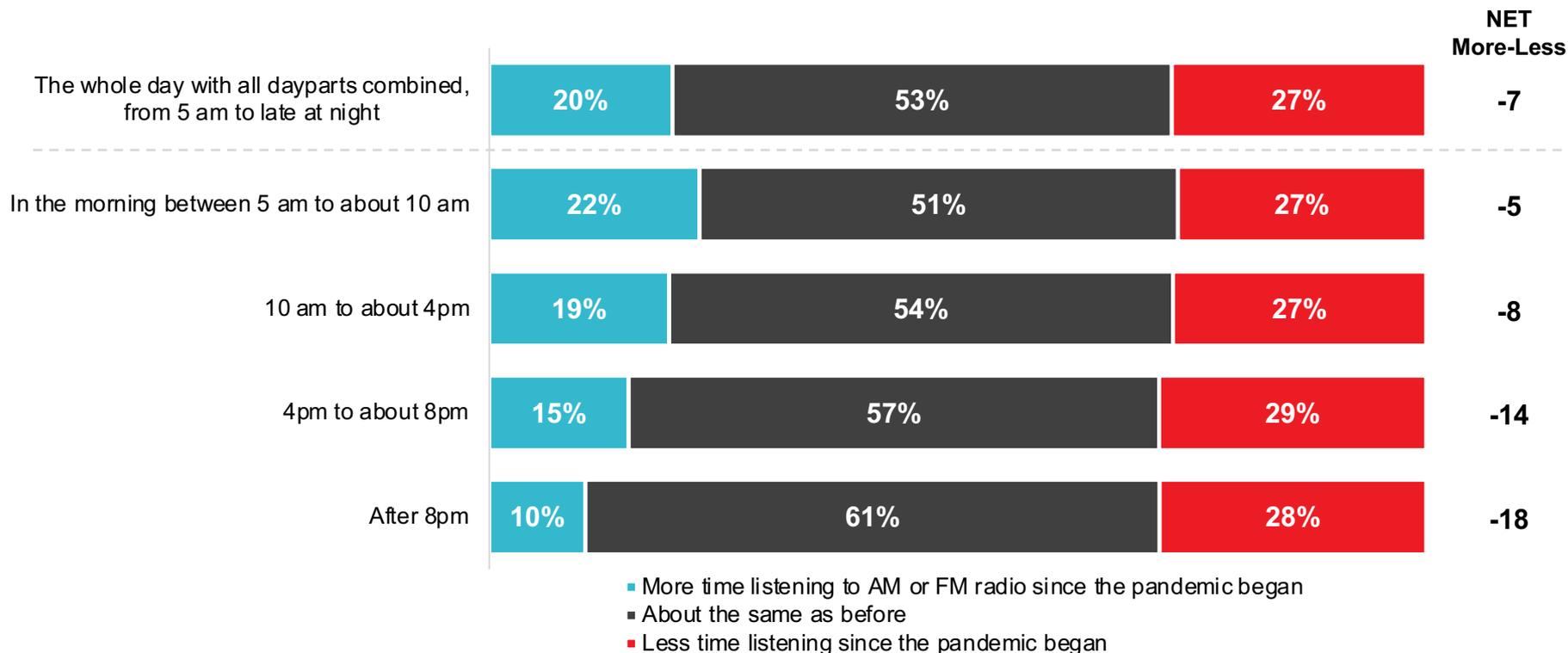
“More often because I work by myself and can listen to music on my own.”

“I have more time for different things, so while in the past I may have picked and choosed what I could do, now I have all day to listen to different things.”

Base: 12+ respondents, excluding none/don't know (n=950); Question: *Thinking of the way you listen to AM or FM radio stations, what are the biggest differences in how you spend your time now compared to prior to the start of the COVID-19 pandemic in early March 2020? Please feel free to tell us about any change in the amount, location or the type of listening.*

When asked specifically and by daypart, more people are saying they are listening 'less' (about 27% to 29% of 12+ population) compared to the percentage those saying they are listening 'more'

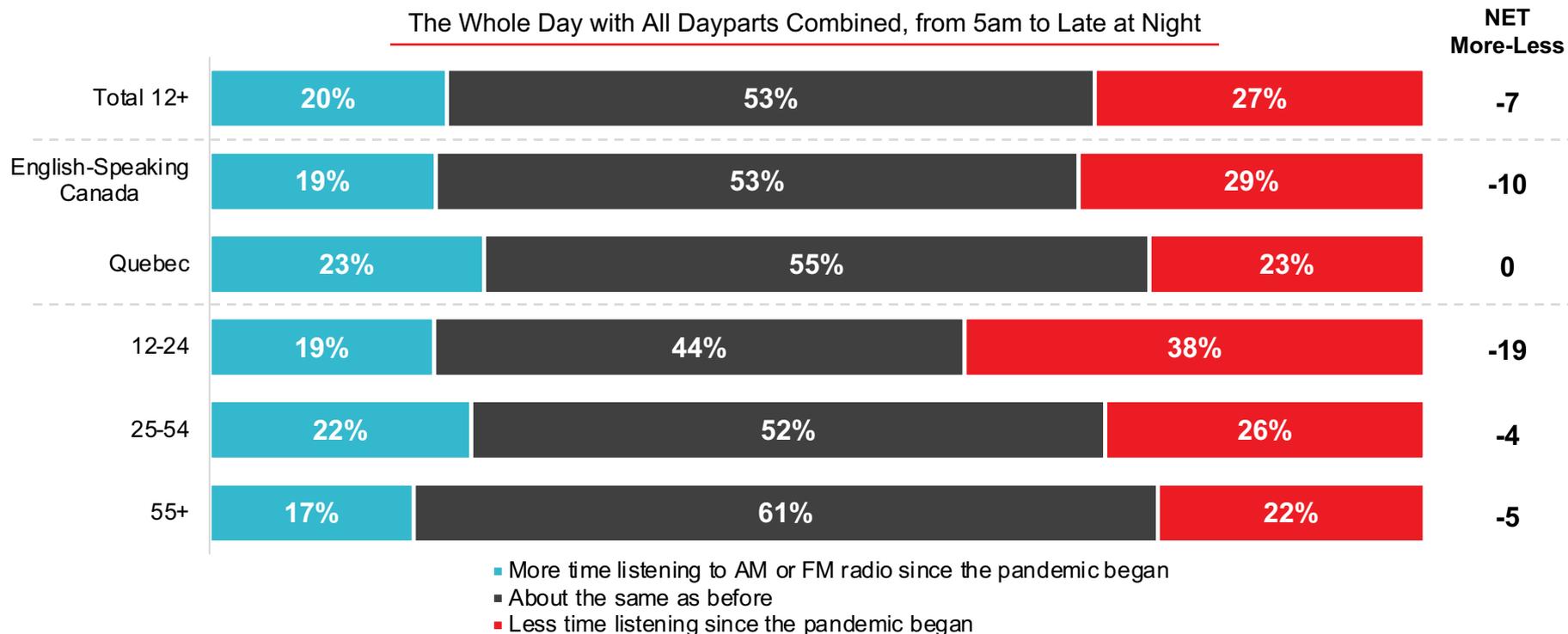
More or Less time spent listening to an AM or FM radio stations currently compared to before the COVID-19 pandemic began



Base: 12+ respondents (n=1000); Question: *Would you say that you are CURRENTLY spending more time OR less time compared to before the COVID-19 pandemic began listening to an AM or FM radio station in the car, at home, at work, using a radio or via a mobile device or a smart speaker, or via an app like TuneIn Or iHeartRadio*

A higher proportion of those in English-speaking Canada say they are listening to AM/FM radio less, compared to those in Quebec

More or Less time spent listening to an AM or FM radio station currently compared to before the COVID-19 pandemic began



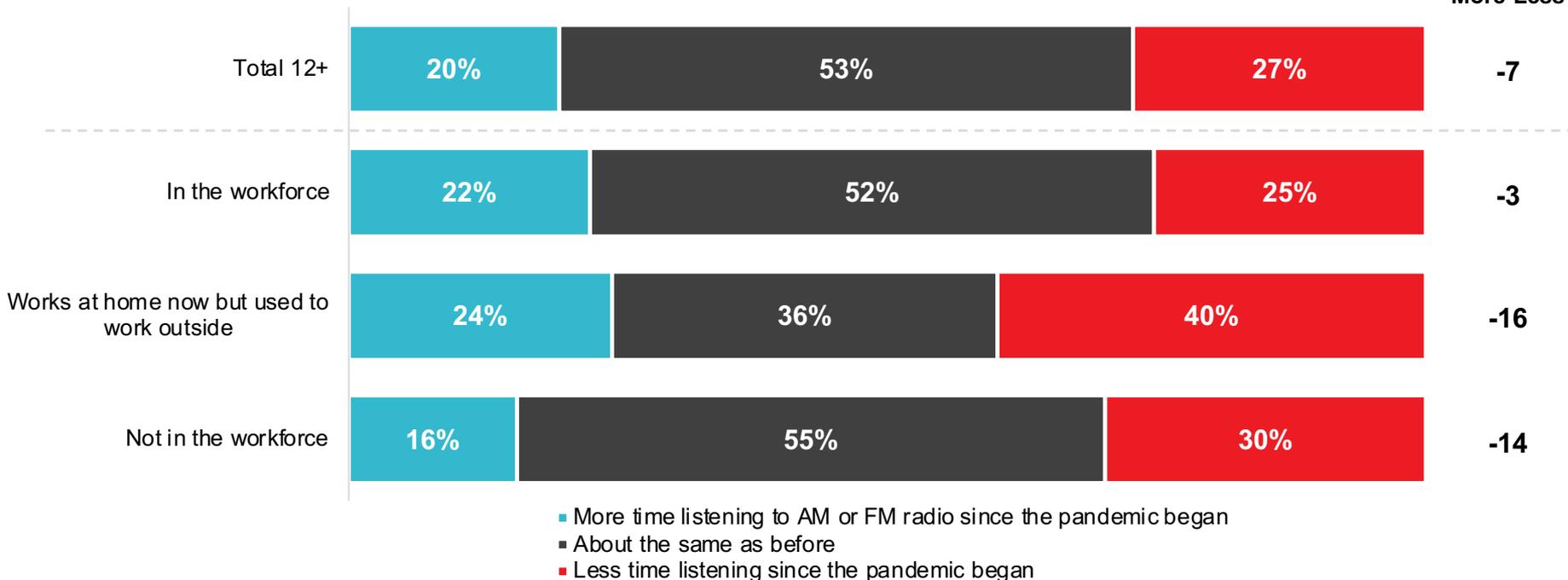
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The sharpest decline has been among those who are now working from home but used to work outside the home – 40% of this group is saying they are ‘listening less’

More or Less time spent listening to an AM or FM radio station currently compared to before the COVID-19 pandemic began

The Whole Day with All Dayparts Combined, from 5am to Late at Night

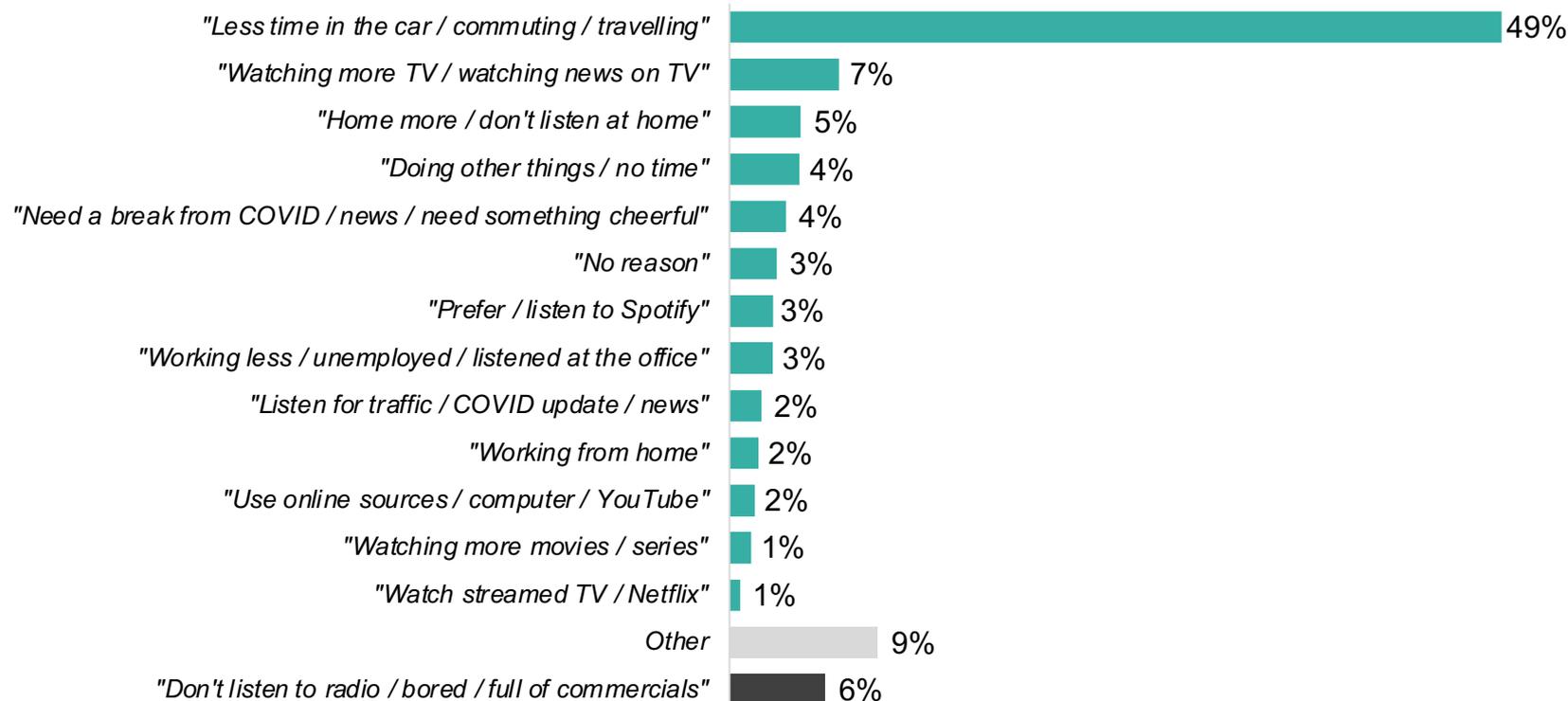
NET
More-Less



Base: 12+ respondents (n=1000); Question: *Would you say that you are CURRENTLY spending more time OR less time compared to before the COVID-19 pandemic began listening to an AM or FM radio station in the car, at home, at work, using a radio or via a mobile device or a smart speaker, or via an app like TuneIn Or iHeartRadio*

Half of those listening less are identifying 'less time in the car' as the main reason for listening less

Main reason for listening less to AM or FM radio since the pandemic began – open-ended categorized



Base: 12+ listening less to AM or FM radio, excluding none/don't know (n=265); Question: *What is the main reason why you are listening less to AM or FM radio since the pandemic began?*

A typical comment about why listening less: “I am in my car less, so I have easier access to Internet and TV news” – also lots of comments from teens who are not listening in the car

Main reason for listening less to AM or FM radio since the pandemic began – open-ended categorized [1 of 2]

“Less time in the car / commuting / travelling”



“Not driving much, change in routine.”

“I only listen to the radio in my car and I’ve been driving much less since the pandemic.”

“I no longer travel so can watch TV instead of the radio.”

“I don’t need to commute.”

“I have other things to do as before I drove a lot so I listened more.”

“I listen to the radio in the car only and since I am not working from home, I spend less time in my car.”

“Less travelling by vehicle to and from work. Which is where I mainly listened.”

“Mostly listening while driving, and driving less overall as I am staying home due to restrictions.”

“I only enjoy radio in the car which no longer happens; at home I prefer to listen to podcasts, lectures and audible books.”

“I am in my car less, so I have easier access to Internet and TV news.”

“Because I don’t drive in the car as often and I prefer listening to music from my phone.”

“Working from home more so no transit time and when I do go to the office I now have to share the space with another person.”

“Less time in the car / commuting / travelling” (AMONG TEENS)



“I’m in the car less. Which is mainly how I listen to radio. Since I don’t always have the option to connect my phone. But now I listen to less radio.”

“Not going as many places.”

“I’m not in the car as much.”

“I used to have a habit of listening in the car, but now we rarely use the car to go anywhere because of the pandemic. Because of this, I stopped listening to the radio.”

“Don’t travel in the car much and at home I can listen to my own playlists.”

“We don’t drive as often as before, since we have nowhere to go.”

“I only listen to radio stations during car rides.”

“Not in the car as often.”

“Because I’m in the car less and that’s where I listen to it.”

“I spend less time travelling in a car.”

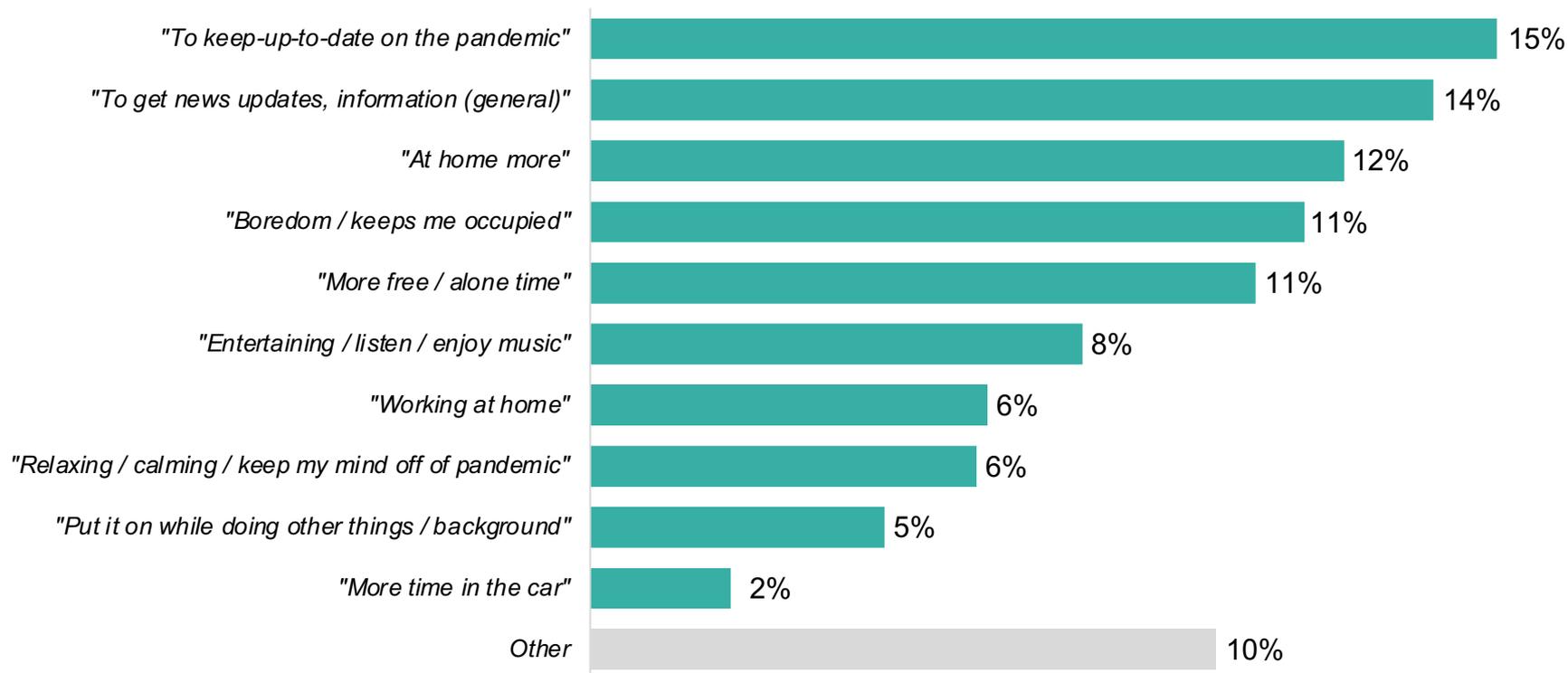
“Not driving as much so I’m not listening to the radio while driving.”

“I only listen on the car, and I don’t ride the car very often anymore.”

Base: 12+ listening less to AM or FM radio, excluding none/don’t know (n=265); Question: *What is the main reason why you are listening less to AM or FM radio since the pandemic began?*

Among those listening to radio more, “keeping up with the pandemic” and news in general are most likely to be mentioned as reasons for tuning in, consistent with other findings

Main reason for listening more to AM or FM radio since the pandemic began – open-ended categorized



Base: 12+ listening more to AM or FM radio, excluding none/don't know (n=183); Question: What is the main reason why you are listening more to AM or FM radio since the pandemic began?

News updates are playing a big role in getting some people to listen more: “[I] want to know updates and new rules and announcements that have happened throughout the day ...”

Main reason for listening more to AM or FM radio since the pandemic began – open-ended categorized

“To keep-up-to-date on the pandemic”



“To hear about news on pandemic.”

“To stay up to date on the latest news regarding pandemic.”

“News about Provincial COVID19 status.”

“To get up to date information on what is happening with regards to the pandemic.”

“To listen to the news to see how the world is coping this pandemic.”

“Want to know updates and new rules and announcements that have happened throughout the day.”

“At home more”



“Due to the pandemic, I have a lot more time at home.”

“With more time at home, I am able to listen to more radio since the pandemic began.”

“Because we are spending more time at home. Not much else to do so we listen to different radio stations to see what we like.”

“I am listening more to the radio because I've been trapped at home.”

“Now that I am home for school I can listen to it more often.”

“We're home more plus my car doesn't cost much gas so when I can I just go for a drive.”

“To get news updates, information (general)”



“I am more interested in the news and want to follow breaking stories.”

I like to be informed and I see the value of listening to the news and being in the know.”

“I want to be up to date with what is happening. If there will be more closures within schools, daycares, workplace etc. Long line up at supermarkets etc., Food shortages.”

“I worry that something will happen and I will be unaware of it, so I keep the radio on in the background for breaking news.”

“Because I like hearing local news and stories, plus community radio offers many programs and perspectives.”

“Working at home”



“More work from home.”

“I couldn't listen at work but now that I'm working from home I can listen all day.”

“Because I now work from home and have access to my smart speaker and laptop to stream the radio.”

“Alternative to my CD collection. Easier to work at home with music on.”

“I am at home working now. I love hearing the news and listening to talk radio I love love love talk radio. Keeps me informed and entertained at the same time.”

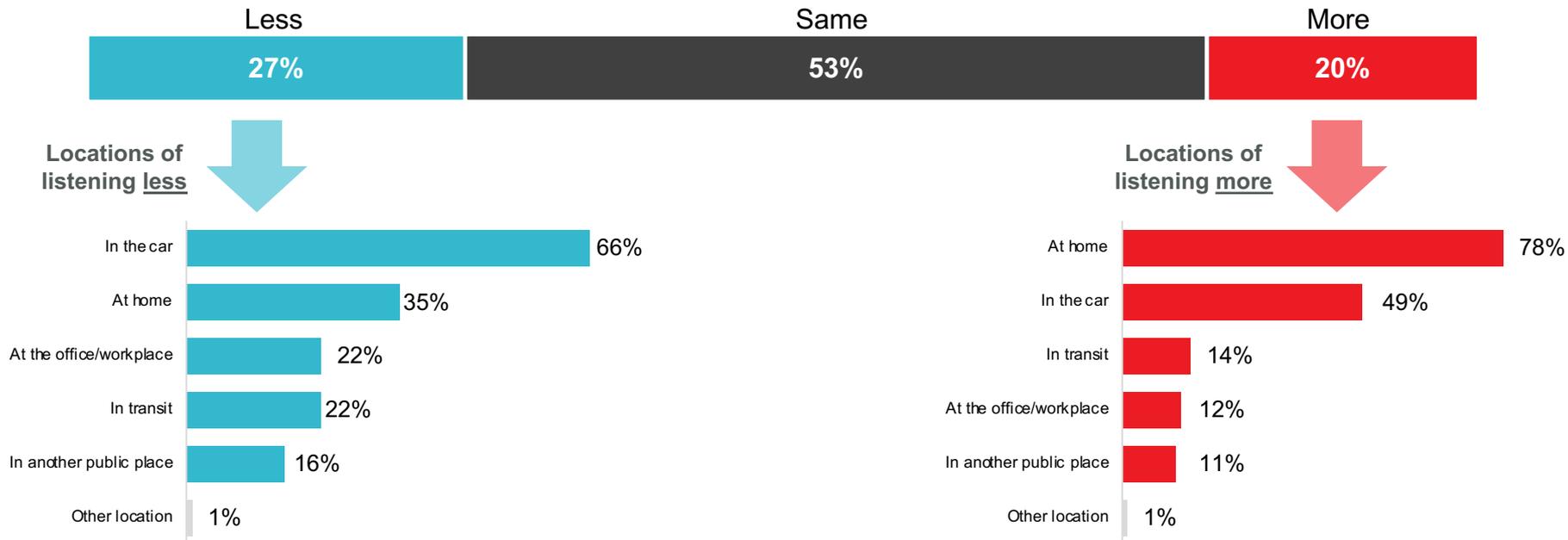
“Since I work from home, I have more time at home to listen to music.”

Base: 12+ listening more to AM or FM radio, excluding none/don't know (n=183); Question: What is the main reason why you are listening more to AM or FM radio since the pandemic began?

Among those listening to radio less, 66% identify their car as the location where they are listening less; and among those saying more, 'home' is in the top spot where they listen more, not surprisingly

Locations of listening to more or less AM or FM radio

The whole day with all dayparts combined, from 5 am to late at night



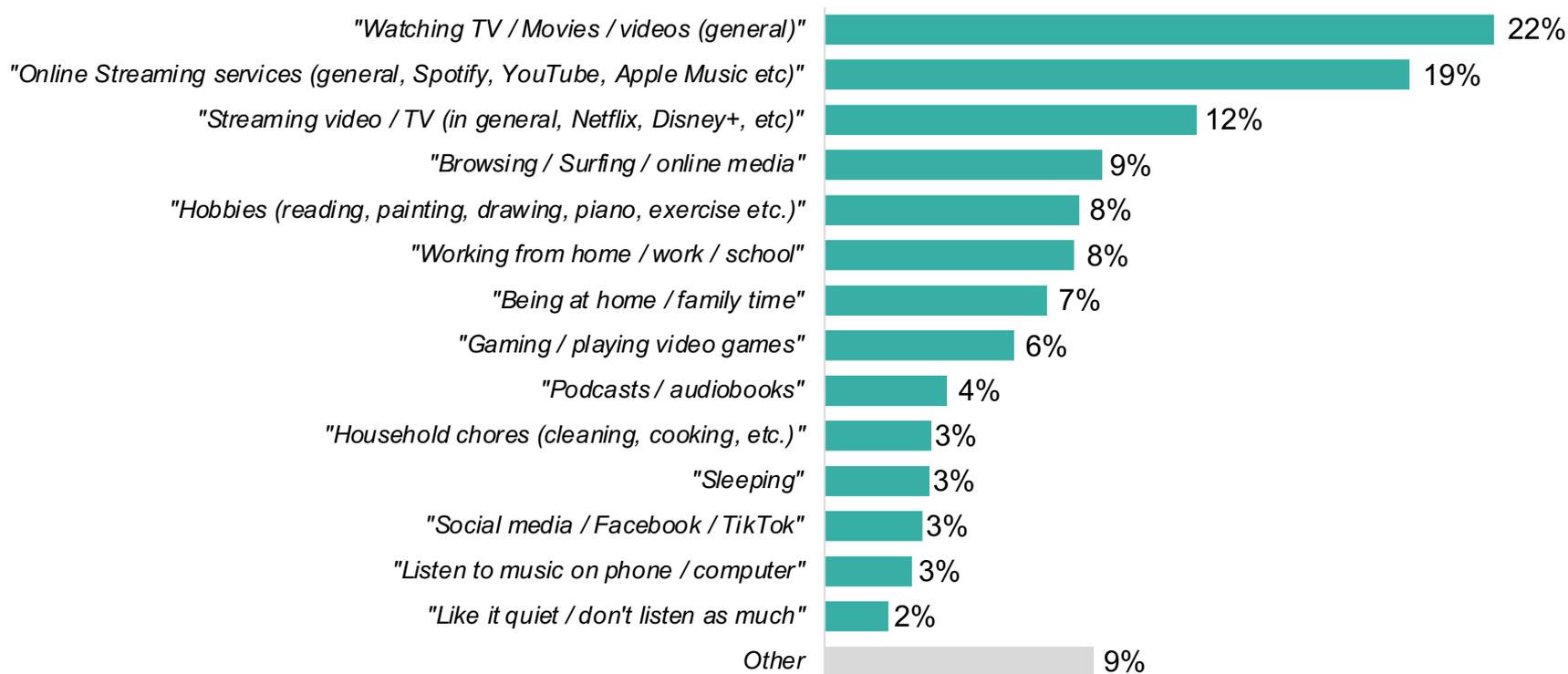
Base: 12+ listening less to AM or FM radio (n=276); Question: At which of the following locations are you listening less?

Base: 12+ respondents (n=1000); Question: Would you say that you are CURRENTLY spending more time OR less time compared to before the COVID-19 pandemic began listening to an AM or FM radio station in the car, at home, at work, using a radio or via a mobile device or a smart speaker, or via an app like TuneIn Or iHeartRadio

Base: 12+ listening more to AM or FM radio (n=194); Question: At which of the following locations are you listening more?

The time 'lost' by radio is not being replaced by other audio services or options only but with TV, streaming video, online and gaming among others, according to open-ended comments

What's replacing the time spent listening to AM or FM radio – open-ended categorized, multi mention



Base: 12+ listening less to AM or FM radio, excluding none/don't know (n=232); Question: *What is REPLACING the time you would have spent listening to AM or FM radio prior to the pandemic now, as best as you can tell?*

“I spend it consuming other content. Such as streaming services, video games, news, and so on.”

What’s replacing the time spent listening to AM or FM radio – open-ended categorized, multi mention

“Watching TV / movies / videos (general)”



- “I watch a lot more TV and play games now instead of listening.”
- “I’ll sleep in the morning instead of listening to radio while driving to work. Other times I’ll watch TV or YouTube instead of listening to radio.”
- “TV and social media and cooking.”
- “Since the pandemic I have been spending more time watching TV and movies as opposed to listening to the radio.”
- “Mostly we are at home. So we go for TV.”
- “Being at home watching TV more than radio.”
- “Mostly, I watch TV and this would be movies with a few series shows. Sometimes, I listen to music on the TV.”
- “Watching the news on TV. Reading the newspaper. Or doing something else that is not a news source.”
- “I tend to watch TV instead, usually one of the 24 hour news channels like CP24 or CBC.”
- “TV and Videos.”
- “Watching TV at home.”
- “I have the TV on as background noise when I work at home now.”

“Online Steaming services (Spotify, YouTube, Apple Music, etc.)”



- “Listening to YouTube.”
- “Listening to Music on Spotify at home.”
- “Downloaded music, such as Amazon music.”
- “Listening through Apple music more.”
- “Staying at home, I don’t listen to the radio at home as I have other options to stream music/talk.”
- “Listening to my own music; Spotify.”

“Streaming video / TV (in general, Netflix, Disney+, etc.)”



- “I spend it consuming other content. Such as streaming services, video games, news, and so on.”
- “I am watching Netflix and listening to Spotify.”
- “I would rather watch YouTube, Netflix, or Disney+.”
- “Online streaming services such as YouTube.”
- “Watching Netflix.”
- “Watching streamed TV.”

Base: 12+ listening less to AM or FM radio, excluding none/don’t know (n=232); Question: *What is REPLACING the time you would have spent listening to AM or FM radio prior to the pandemic now, as best as you can tell?*

Post-Pandemic Factors that will Impact Radio Use

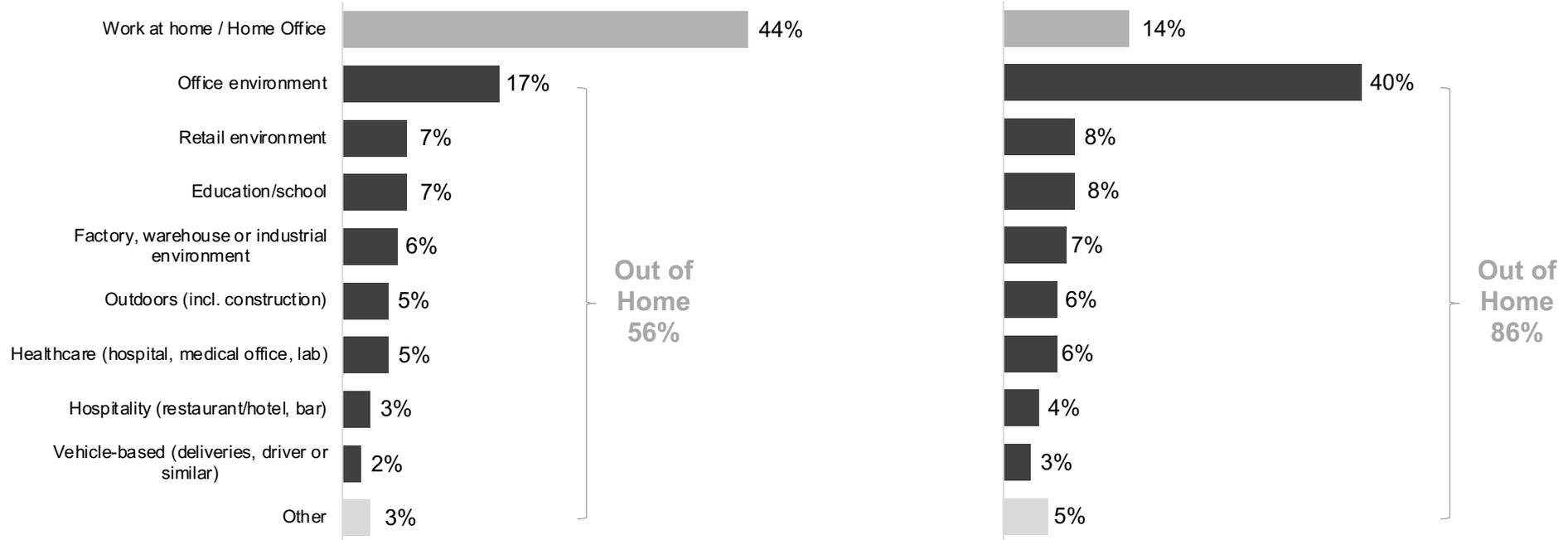


86% of working Canadians worked outside the home prior to the pandemic versus 56% now; WFH (work from home) accounted for 14% prior to the pandemic and more than tripled to 44% now

Working environment – currently and prior to the start of COVID-19

During the Pandemic (December 2020)

Prior to the COVID-19 Pandemic



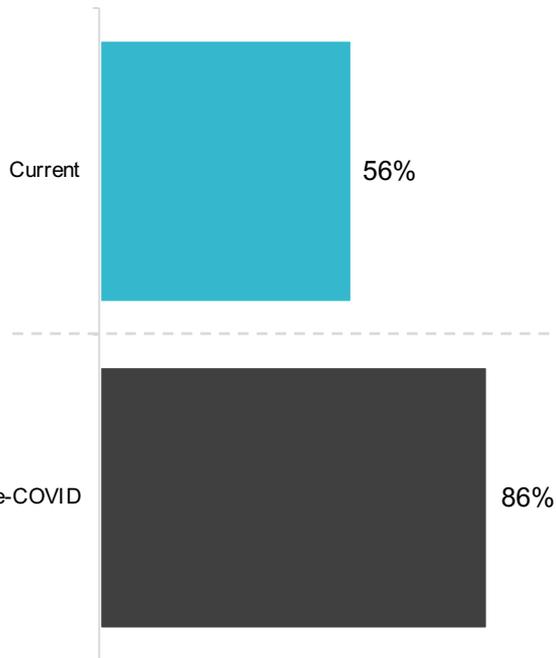
Base: 18+ employed (n=592); Question: *And, which of the following would best describe your working environment CURRENTLY?*

Base: 18+ employed or temporarily furloughed/on leave (n=613); Question: *Prior to the start of the COVID-19 pandemic restrictions in March 2020 in Canada, which of the following would have best described your working environment?*

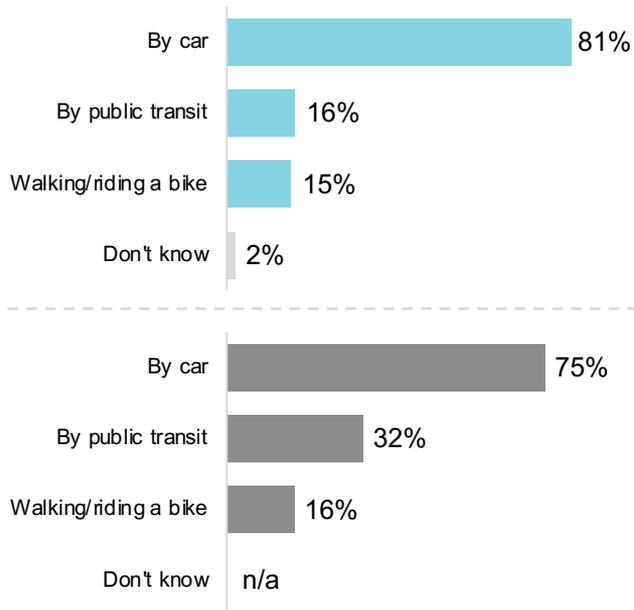
In-vehicle tuning is very important to radio – another view of use of vehicles from the research: 65% of those in the labour force were driving to work pre-COVID – the comparable number now is 45%

Mode of transportation to work – prior to the start of COVID-19 and currently among those working (worked) outside of the home

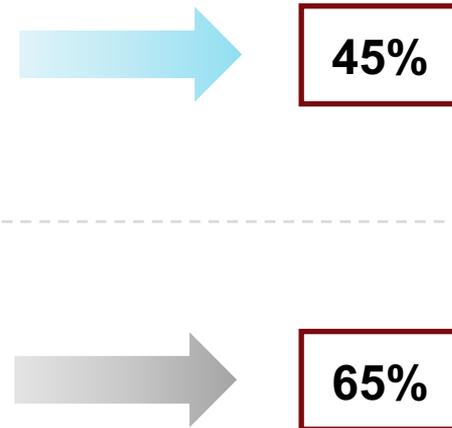
Working Out of Home % Among Those in the Labour Force



Mode of Transportation



NET % Driving Among those in the Labour Force

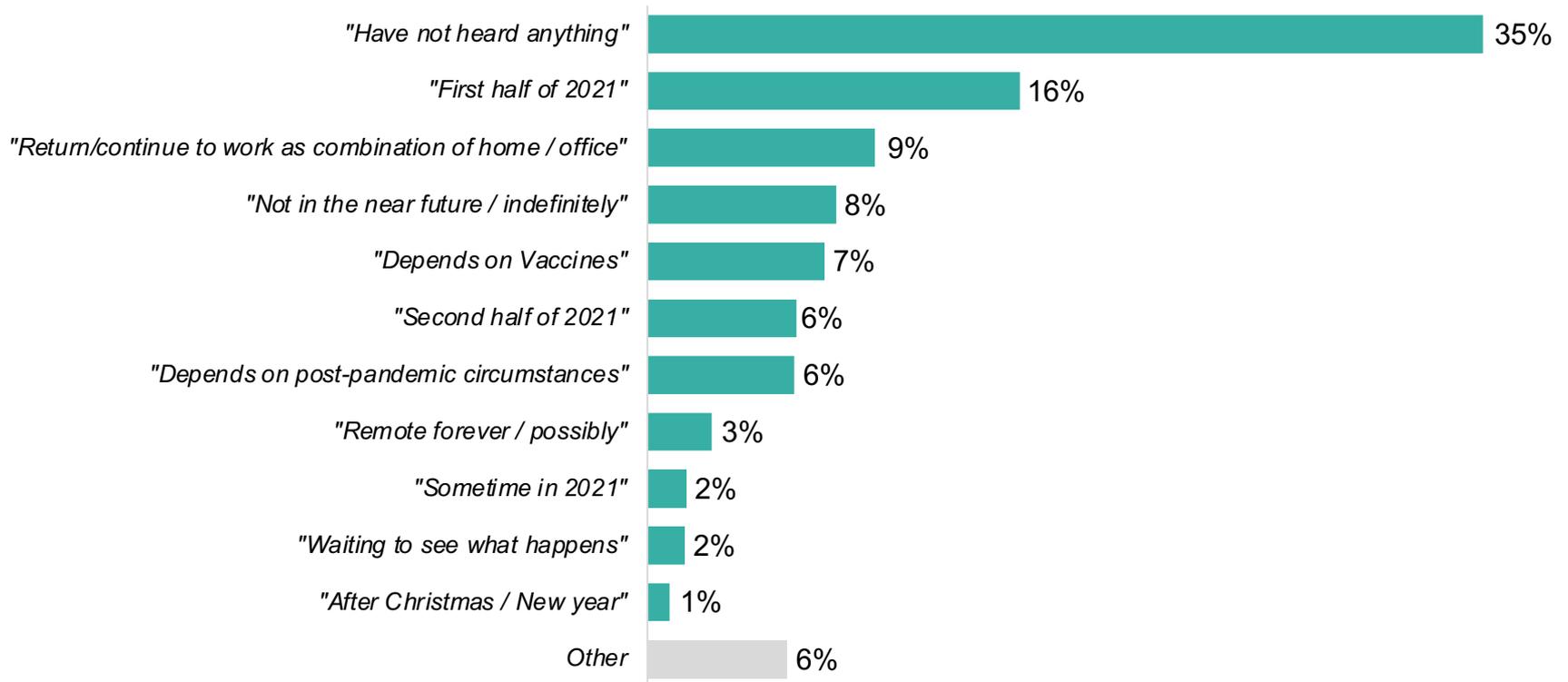


Base: 18+ working outside of the home/home office (n=333); Question: *And, how do you get to work currently?*

Base: 18+ worked outside of the home/home office (n=532); Question: *Prior to the start of the COVID-19 pandemic restrictions in March 2020 in Canada, how did you get to work?*

35% of those now working from home have not heard anything about possible return to the workplace – the rest of the comments on what employees heard from employers indicate strong uncertainty

Possible return to the workplace among those now working from home – open-ended categorized



Base: 18+ currently working from home vs. previously working at workplace, excluding none/don't know (n=175); Question: *It would seem you are now working at home, when you were previously working at workplace such as an office. What, if anything, have you heard from your employer about possible return to that workplace as the COVID-19 restrictions are lifted sometime in 2021?*

There are comments that suggest working from home a long time/indefinitely and some even mention permanent shifts to working from home

Possible return to the workplace among those now working from home – open-ended categorized

“Not in the near future / indefinitely”

“It will be optional return for the foreseeable future.”

“I will likely be able to continue working from home indefinitely.”

“We were told no plans to return any time soon.”

“We are not forced to return.”

“Nothing for the near future regarding going back to the office.”

“NO news yet uncertain it seems this pandemic will last a long time to come and it is possible that work at home will become a new normal for quite some time.”

“Remote forever / possibly”

“We have no timelines to return to the office at this time. We are considering permanently moving to working from home.”

“No immediate plans have been shared, but discussion is taking place about never going back.”

“No more work office in the future.”

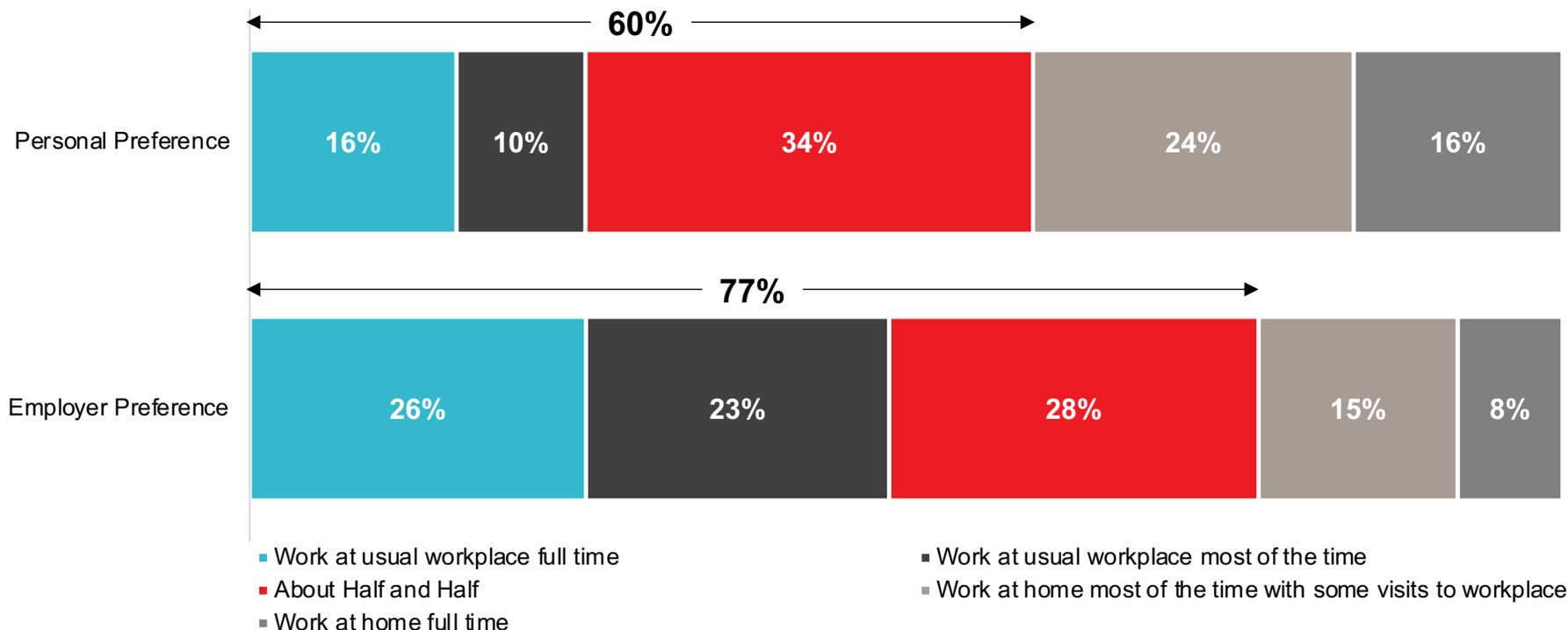
“No, my job is remote forever.”



Base: 18+ currently working from home vs. previously working at workplace, excluding none/don't know (n=175); Question: *It would seem you are now working at home, when you were previously working at workplace such as an office. What, if anything, have you heard from your employer about possible return to that workplace as the COVID-19 restrictions are lifted sometime in 2021?*

77% of those currently working from home believe their employers will want them to be working from their usual place of business at least half of the time and 60% say this is also their preference

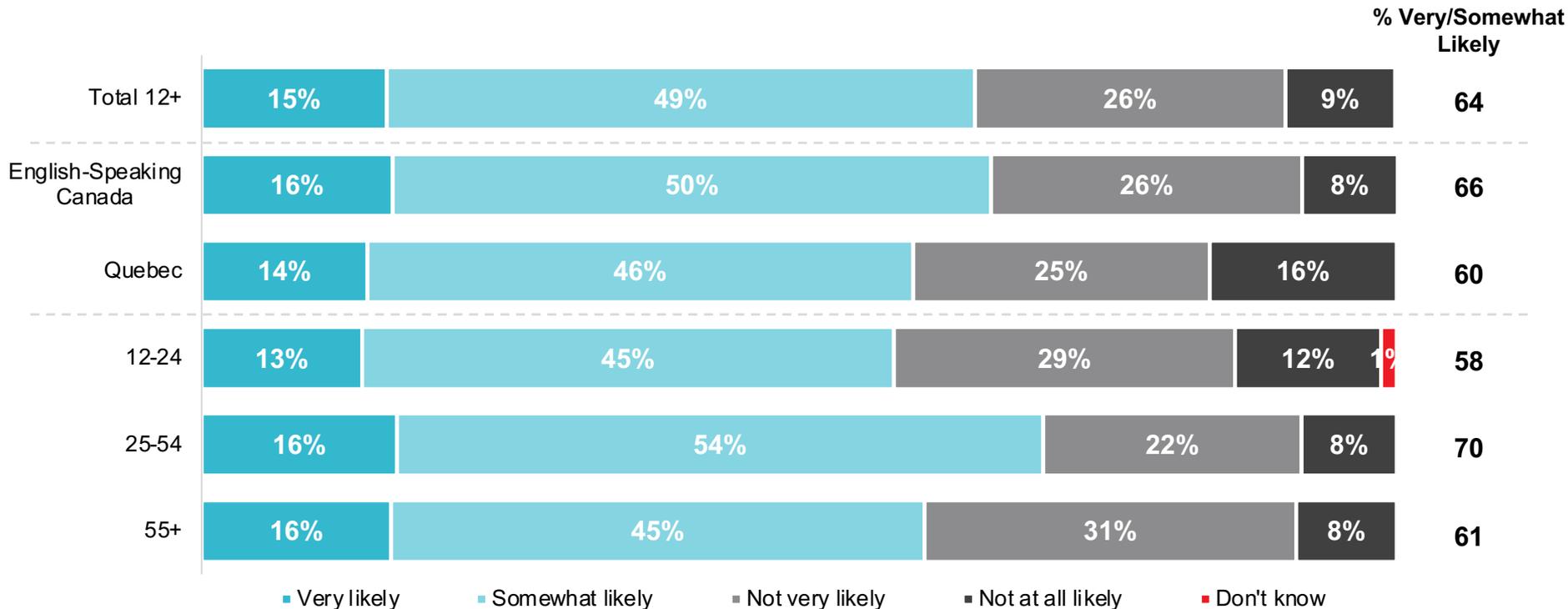
Employer and personal preference in regards to working from home or the workplace after COVID-19 restrictions are lifted



Base: 18+ working at home due to COVID (n=184); Questions: *Would you say that you personally want to work at your usual workplace OR work from home after COVID-19 restrictions are lifted sometime in 2021?;*
Question: As best as you know, will your employer want you to work at their usual workplace OR work from home after COVID-19 restrictions are lifted sometime in 2021?

Among those listening to less radio less, 64% say they will likely listen as much as they used to post-pandemic – but this is not a universal response - 35% don't think they will be back to their old levels

Likelihood of listening as much after the pandemic ends as before the pandemic – by region and age

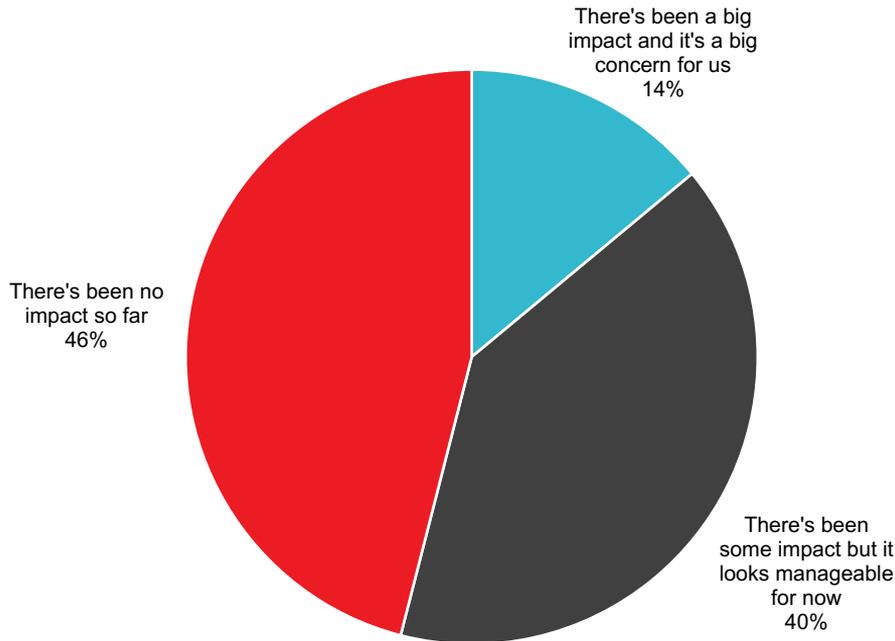


Base: 12+ listening less to AM or FM radio (n=276); Question: *And, how likely is it that you will listen as much as you used to before the pandemic, after the pandemic ends sometime in the next year?*

Over half of Canadian households report at least some economic impact from the pandemic; and 75% believe the pandemic is a major event whose impact on their 'behaviours and habits' will be long term

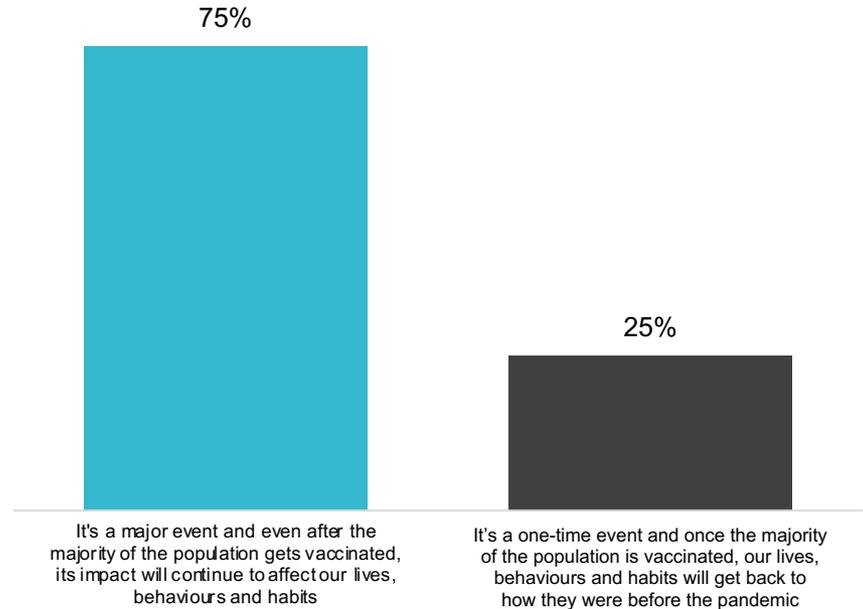
Impact of COVID-19 pandemic on household situation and views of impact on Canadian society

Impact on household situation



Base: 12+ respondents (n=1000); Question: *Which of the following best describes your household situation in terms of employment or earnings due to the Covid-19 pandemic?*

View of impact on Canadian society & people

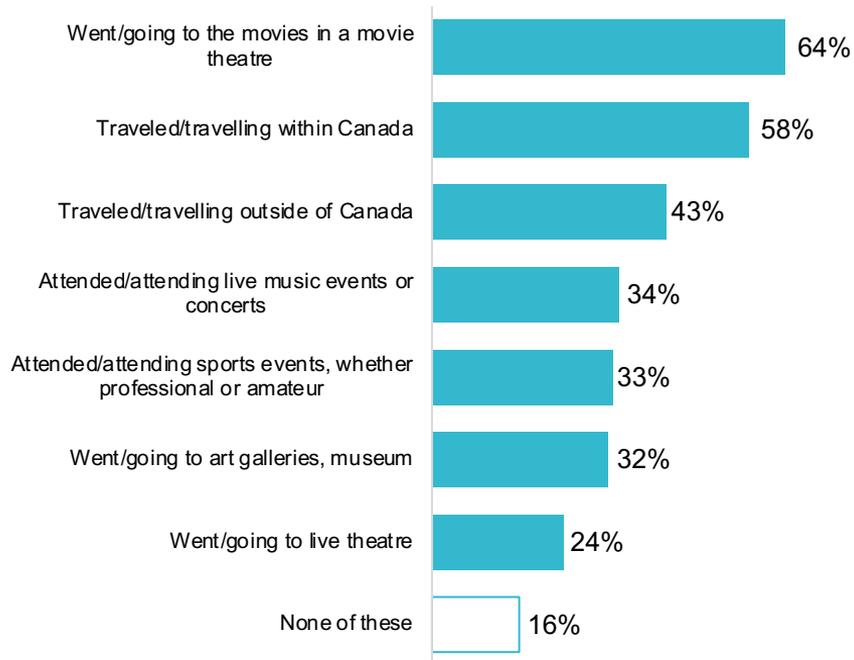


Base: 12+ respondents (n=1000); Question: *Which of the following best describes your views on COVID-19s impact on Canadian society and people like yourself?*

Canadians are looking forward to travel after the pandemic but some things will not come back – 53% say they are looking forward to attending movies down from 64% attendance prior to the pandemic

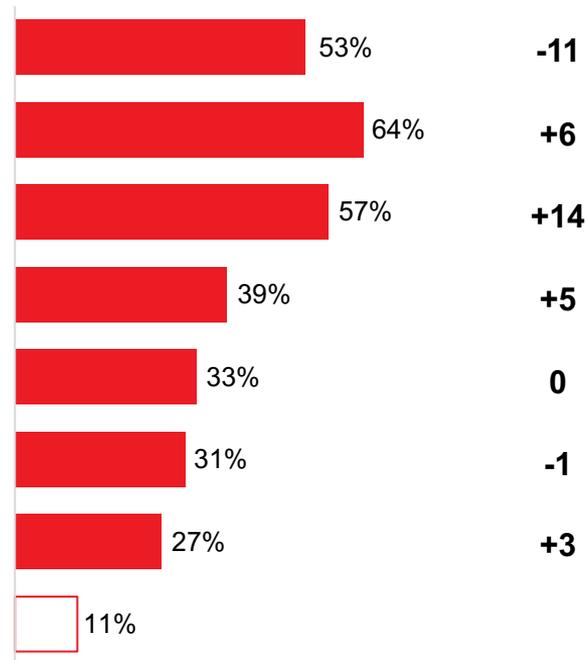
Activity participation in 2019, the full year prior to the pandemic and anticipated activities once the pandemic is over – multiple mentions

Activity Participation Prior to the Pandemic



Base: 12+ respondents (n=1000); Question: *Please check the activities you participated in 2019, the full year prior to the pandemic*

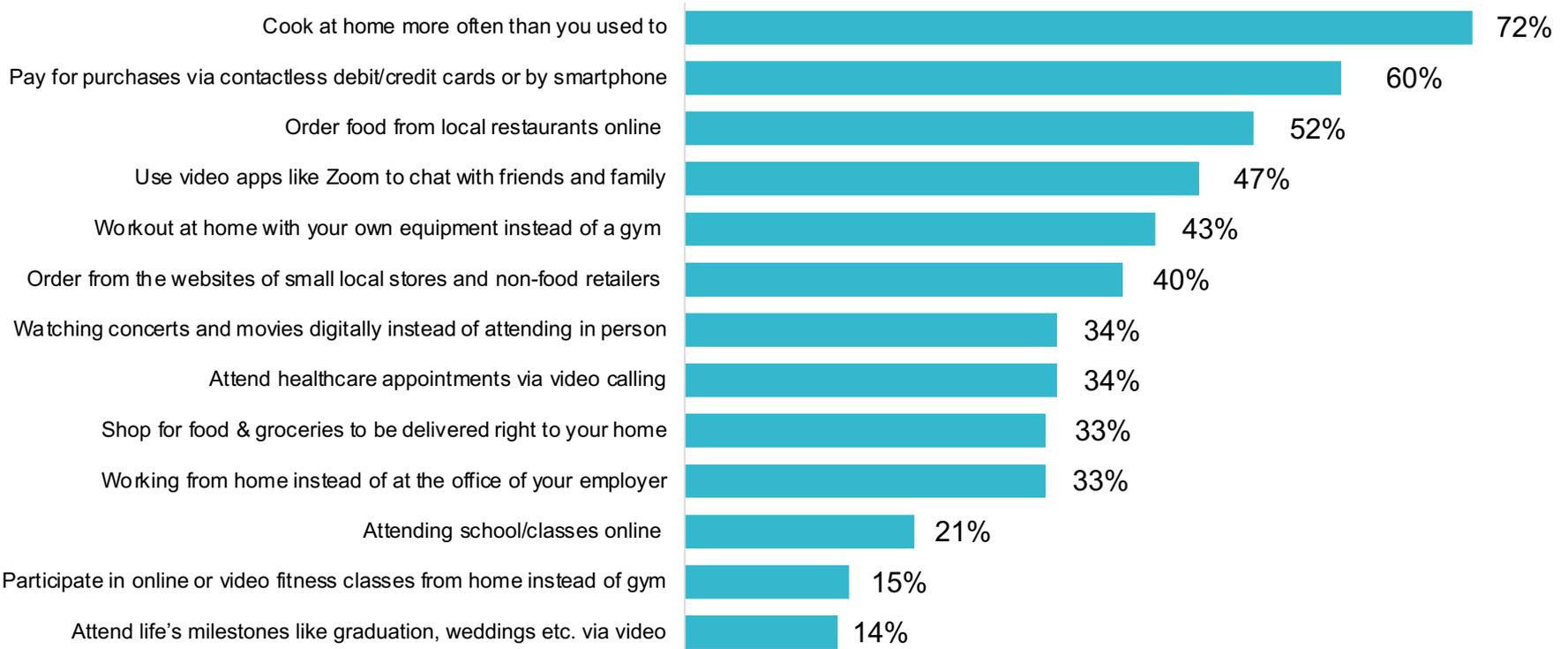
Anticipated Activities after the Pandemic



Base: 12+ respondents (n=1000); Question: *And, which of the following do you look forward to doing once the pandemic is over?*

Overall, consumers are projecting retaining some of the 'home-centred' and online-enabled behaviours of the lockdowns 'long after' the pandemic is over

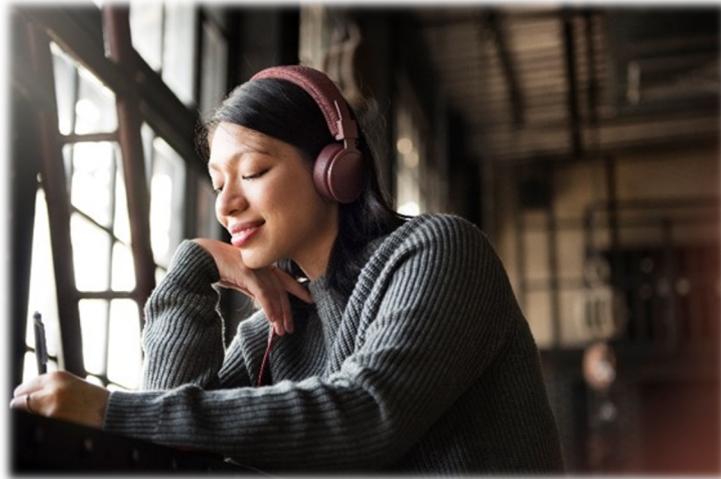
Behaviours most likely to be continued even long after this pandemic is over



Base: 12+ respondents (n=1000); Question: *Here's a list of new things consumers said they have been doing as a result of the pandemic. Which five of these are you most likely to continue to do even long after this pandemic is over?*

Appendices

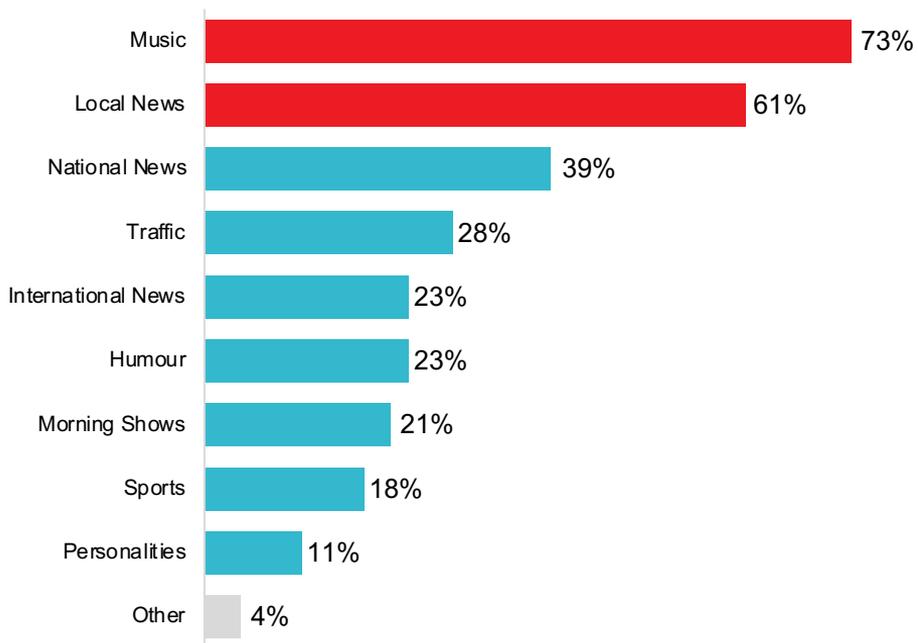
Appendix: How Listeners Use Radio and What's Important



Music is first and “local news” is the second most valuable aspect of AM/FM radio for tuning, other factors are significantly less important overall

Most valuable aspects of AM or FM radio – (multiple mentions)

12+ Respondents



By Region and Age

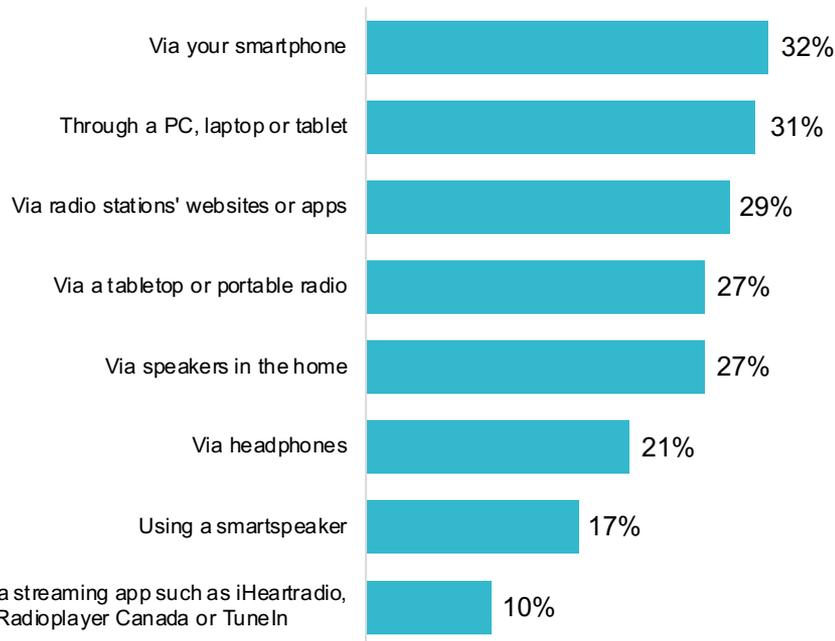
	English-Speaking Canada	Quebec	12-24	25-54	50+
Music	73%	72%	82%	73%	67%
Local News	63%	53%	45%	59%	73%
National News	38%	40%	28%	37%	47%
Traffic	29%	23%	25%	30%	25%
International News	21%	32%	28%	21%	26%
Humour	22%	28%	41%	22%	16%
Morning Shows	20%	23%	19%	26%	14%
Sports	18%	15%	20%	18%	16%
Personalities	11%	11%	10%	12%	9%
Other	5%	2%	2%	2%	8%

Base: 12+ listens to at least 1 hour of AM/FM radio (n=860); Question: *What three aspects of AM or FM radio are most valuable to you in general?*

One-in-three say they listen through a smartphone (32%), and 31% via a PC or a tablet and 29% via a radio station's app or website

Places of listening to AM or FM radio

Listen to at Least 1 Hour AM / FM Radio



By Region and Age

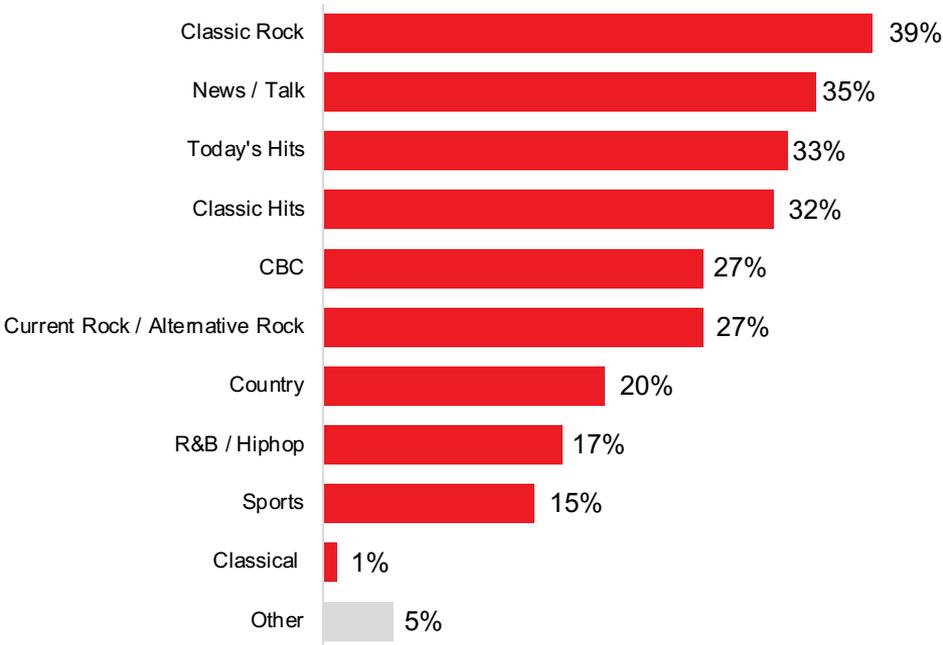
	English-Speaking Canada	Quebec	12-24	25-54	50+
Via your smartphone	34%	27%	46%	35%	19%
Through a PC, laptop or tablet	31%	31%	31%	31%	30%
Via radio stations' websites or apps	31%	24%	28%	24%	39%
Via a tabletop or portable radio	25%	34%	23%	24%	34%
Via speakers in the home	28%	21%	28%	28%	23%
Via headphones	20%	22%	39%	22%	8%
Using a smartspeaker	17%	18%	22%	19%	11%
Using a streaming app such as iHeartradio, Radioplayer Canada or TuneIn	9%	12%	9%	12%	6%

Base: 12+ listens to at least 1 hour of AM/FM radio (n=860); Question: *And, indicate the ways you listen, please*

Not surprisingly, 12-24s are much more likely to listen to Hit-based formats while 55+ skew to Classic Rock and News/Talk formats

Types of radio stations / formats listened to

Types of Stations/Formats Listened to



By Region and Age

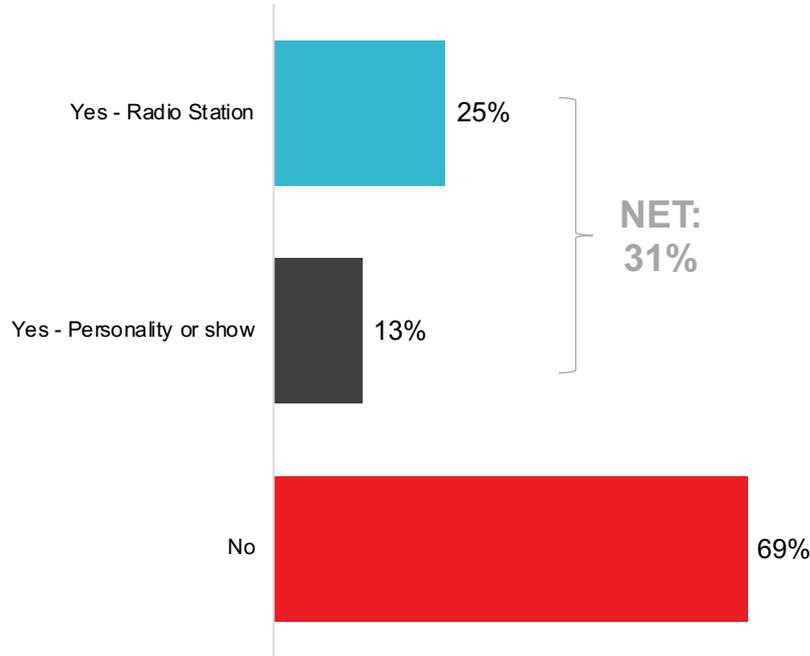
	English-Speaking Canada	Quebec	12-24	25-54	55+
Classic Rock	38%	42%	28%	37%	49%
News / Talk	34%	39%	28%	33%	41%
Today's Hits	32%	36%	49%	36%	20%
Classic Hits	34%	27%	30%	36%	28%
CBC	26%	30%	27%	28%	25%
Current Rock / Alternative Rock	27%	26%	21%	33%	21%
Country	24%	9%	22%	19%	21%
R&B / Hip-hop	17%	16%	35%	18%	5%
Sports	16%	14%	14%	18%	11%
Classical	1%	—	1%	1%	—
Other	5%	4%	5%	5%	6%

Base: 12+ listens to at least 1 hour of AM/FM radio (n=860); Question: Please indicate the types of radio stations/formats that you listen to

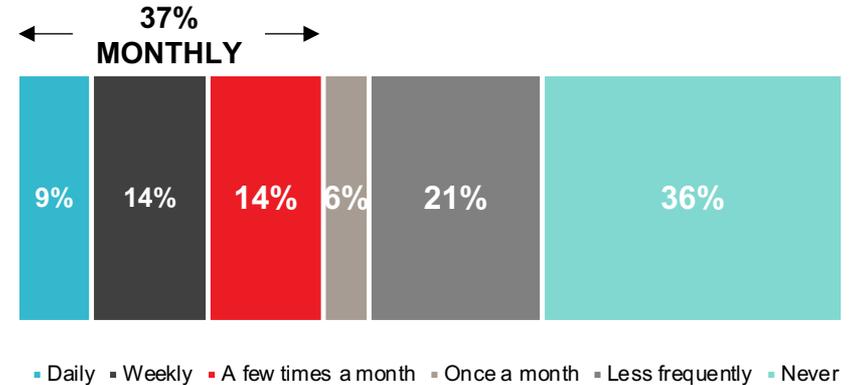
Over one-in-three radio listeners also follow their favourite stations or personalities online; 37% visit radio station websites on a monthly basis

Social media following of radio stations, personalities or show on a radio station and frequency of website visits of radio favourites

Follow or Subscribe to Social Media Feeds



Frequency of Website Visits of Favourite(s)



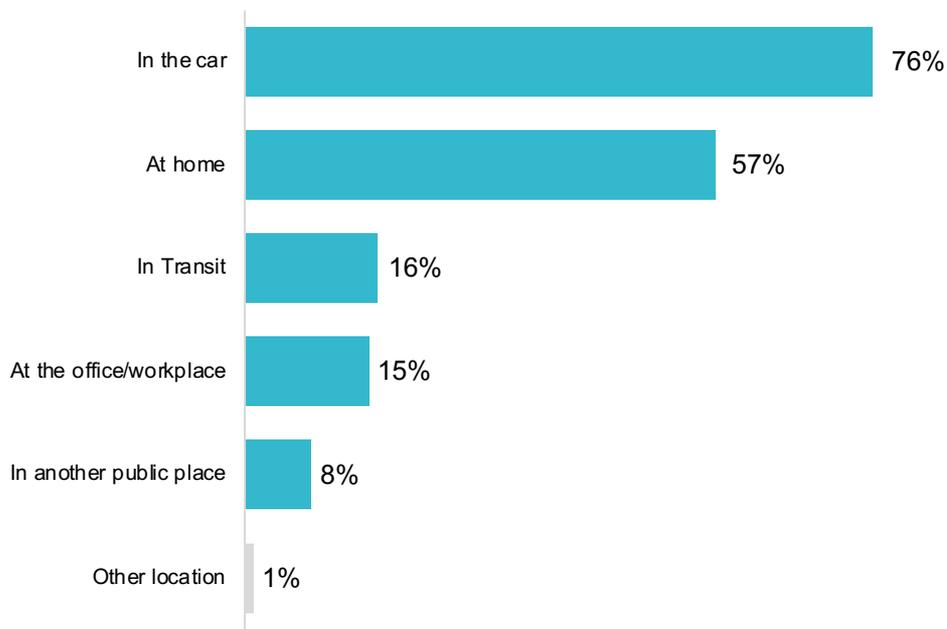
Base: 12+ listens to at least 1 hour of AM/FM radio (n=860); Question: Do you follow or subscribe to the Twitter, Facebook, Instagram, YouTube or other social media feeds of a radio station, OR any personality or show on a radio station

Base: 12+ listens to at least 1 hour of AM/FM radio (n=860); Question: And, how frequently, if ever, do you visit the website(s) of your favourite radio stations?

In-car listening is very important to overall reach, 70%+ in all demos identify a car/vehicle as a place for tuning, ahead of 'at home' overall

Places for listening to AM or FM radio

12+ Respondents



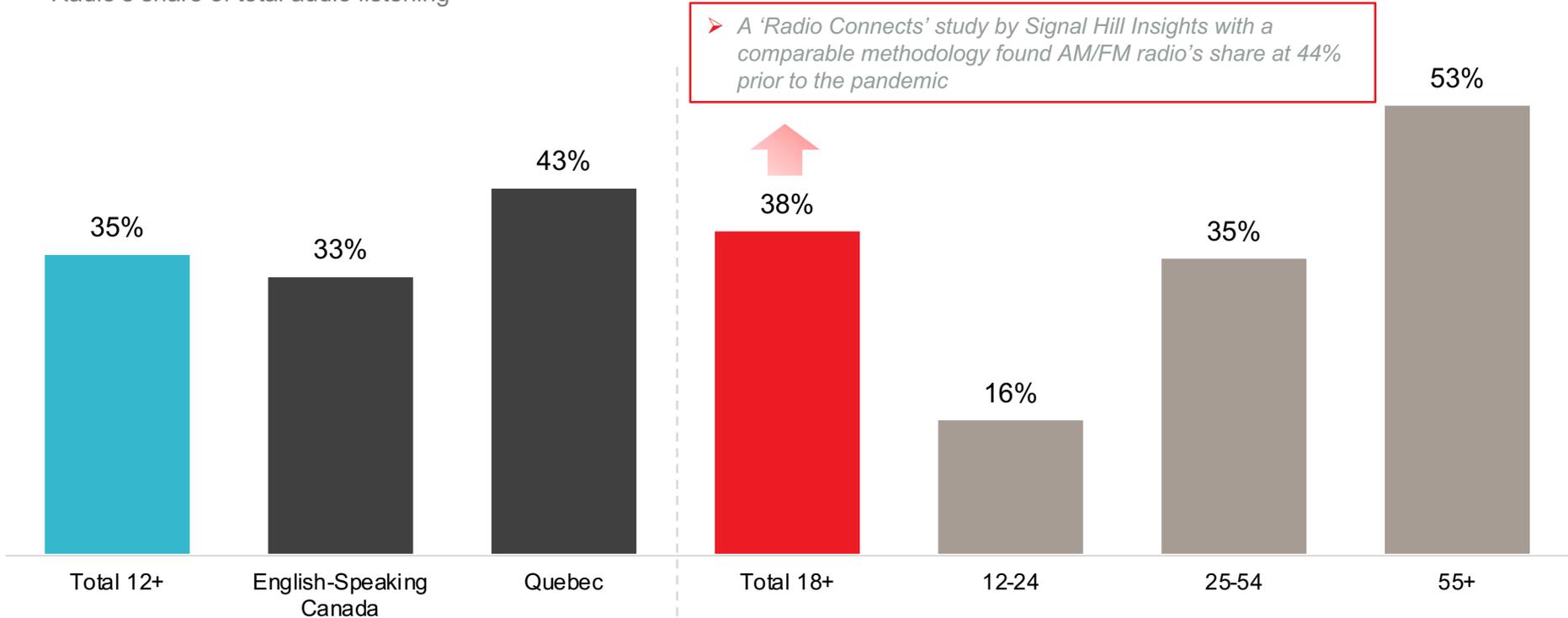
By Region and Age

	English-Speaking Canada	Quebec	12-24	25-54	50+
In the car	77%	70%	77%	77%	73%
At home	57%	60%	51%	54%	66%
In Transit	15%	20%	25%	15%	13%
At the office/workplace	14%	17%	18%	20%	5%
In another public place	8%	7%	18%	7%	3%
Other location	1%	1%	3%	1%	1%

Base: 12+ listens to at least 1 hour of AM/FM radio (n=860); Question: *Please check all the places you listen*

AM/FM radio accounted for 35% of all 'audio' listening 12+, with significant differences evident by age and region

Radio's share of total audio listening



Base: 12+ respondents (n=1000); Question: Thinking about your typical listening pattern in recent times, for example, the first half of December to music, news and spoken word content including some the same sources we talked about earlier – that is, AM or FM radio at home, at work, in the car, satellite radio, streaming content from paid or free audio streaming sites or podcasts or audiobooks from any source.... how many hours would you spend in a typical week listening to all of these combined?; Question: Based on the above, you listen to about [INSERT AUTO-CALCULATION TOTAL FROM ABOVE] hours of music, news and spoken word content per week from all sources. Approximately how many hours of this would be listening to an AM or FM radio station in the car, at home, at work, using a radio or via a mobile device or a smart speaker, or via an app like TuneIn Or iHeartRadio?

Appendix: Study Demographics*

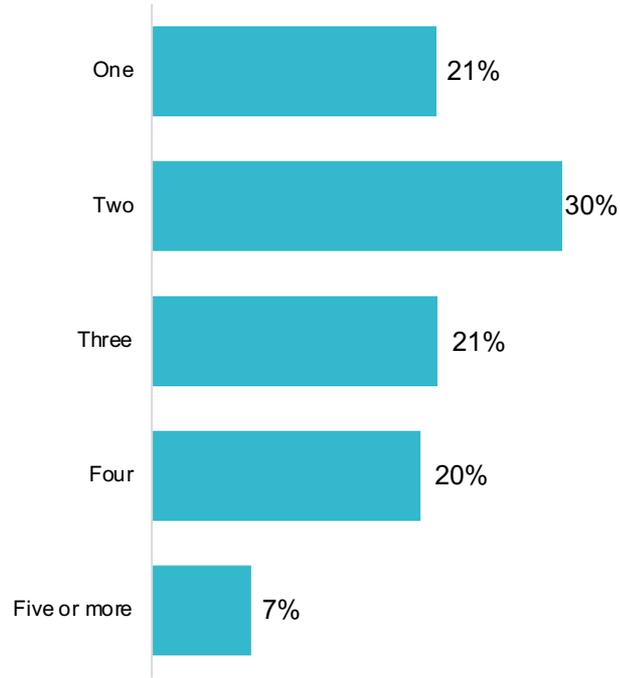


** Study demographics shown in the next five pages closely match the universe of the population by age, gender, regional distribution and other significant socio-demographic variables by design and therefore fairly represent the Canadian population ages 12 and older*

Study Demographics – Households

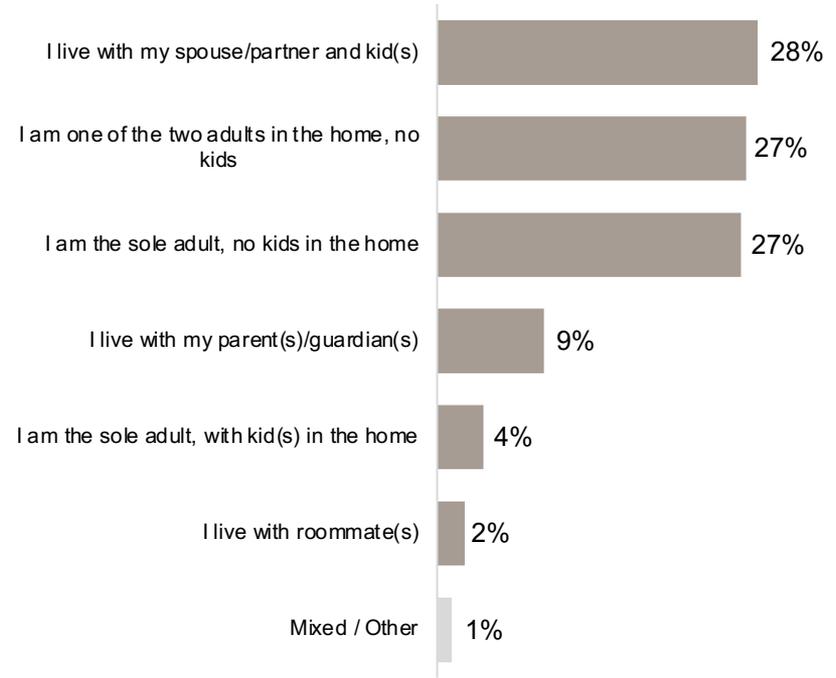
Number of people in the household and household composition

Number of People in the Household



Base: All respondents (n=1000); Question: *How many people, including yourself, live in your household?*

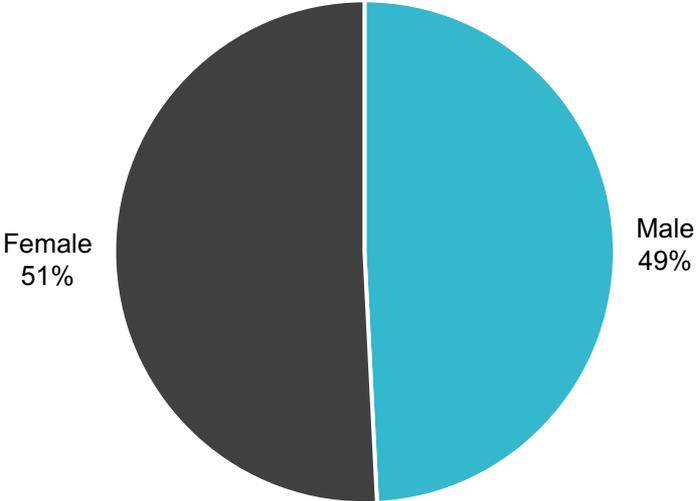
Household Composition



Base: All respondents (n=1000); Question: *Can you please tell us which of the following best describes your current household arrangement?*

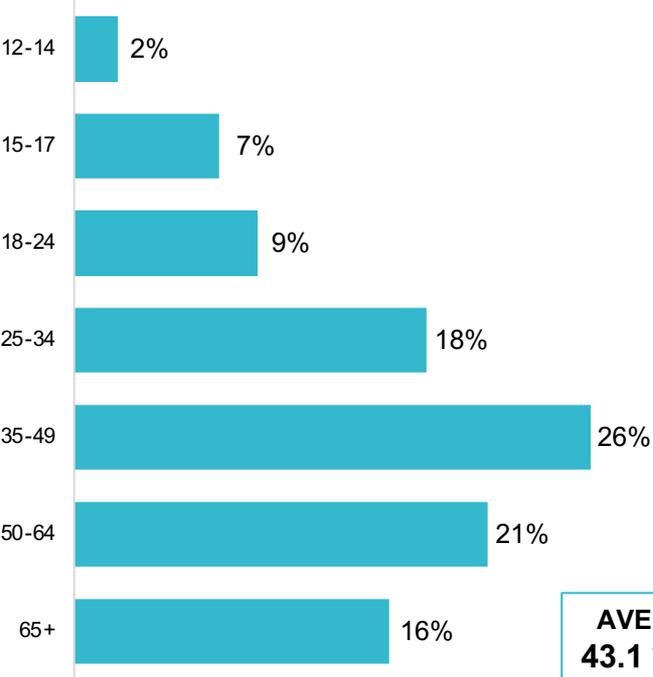
Gender & Age

Gender



Base: All respondents (n=1000); Question: *You are...*

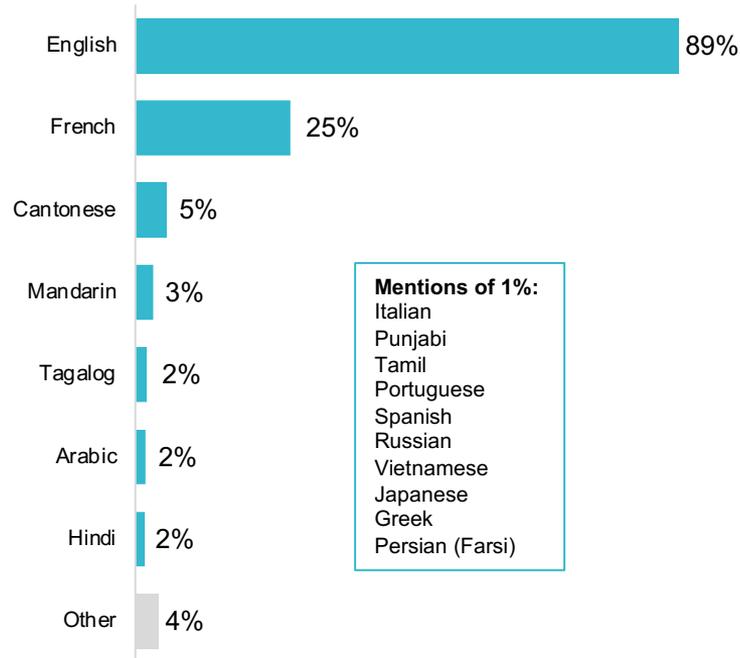
Age



Base: All respondents (n=1000); Question: *In what year were you born?*

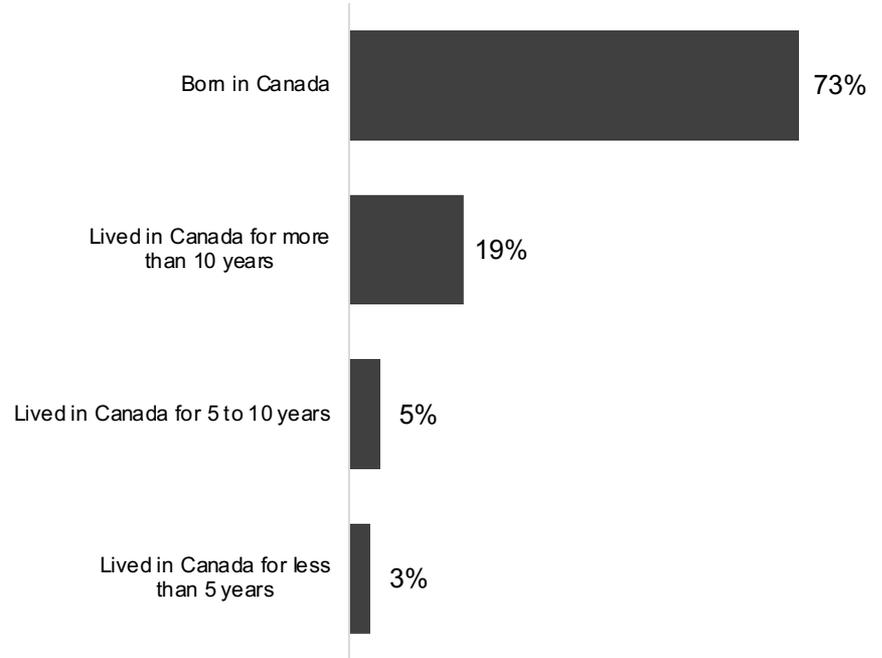
Languages and Whether Born in or Outside of Canada

Languages Spoken in Household



Base: All respondents (n=1000); Question: *What languages are spoken in your household?*

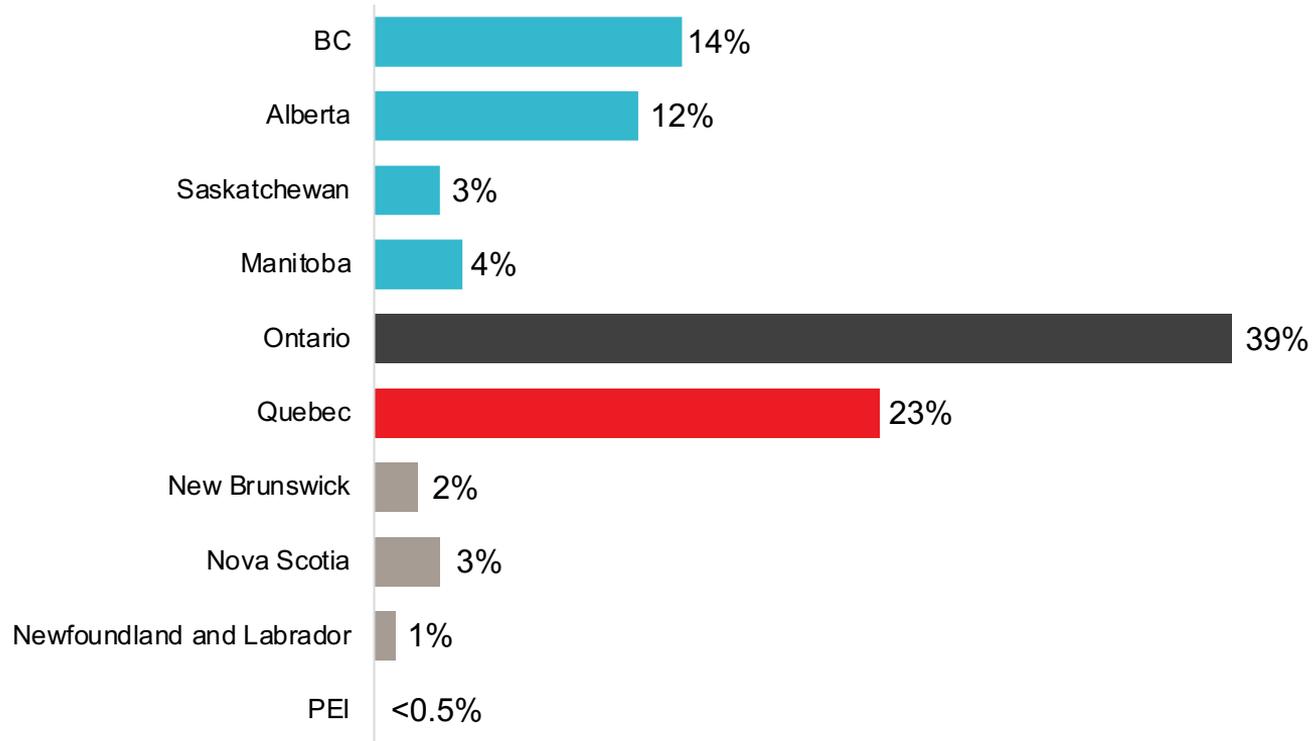
Born in or Outside of Canada



Base: All respondents (n=1000); Question: *Which of the following describes you best?*

Regional Representation

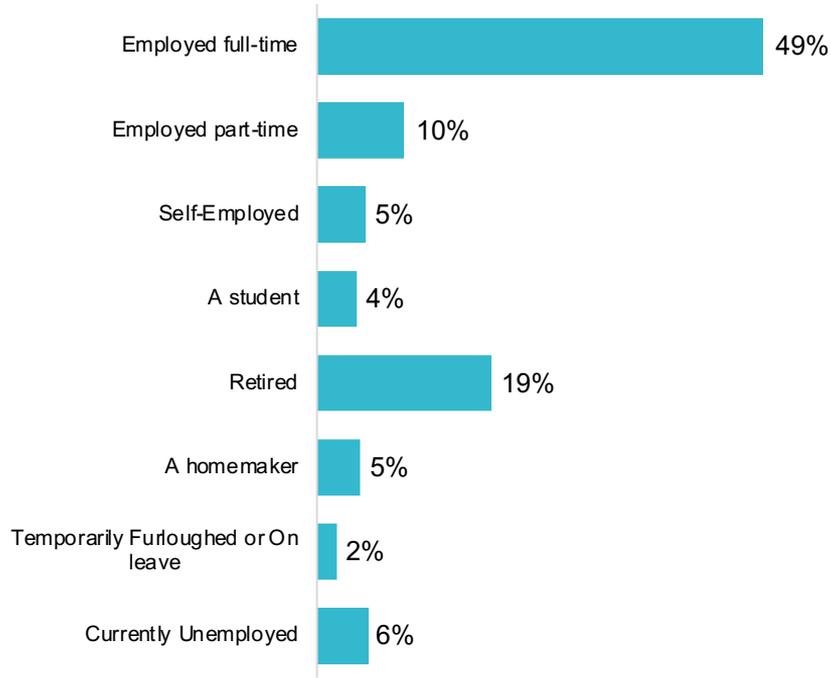
Province of residence



Base: 12+ respondents (n=1000); Question: *In which province do you live?*

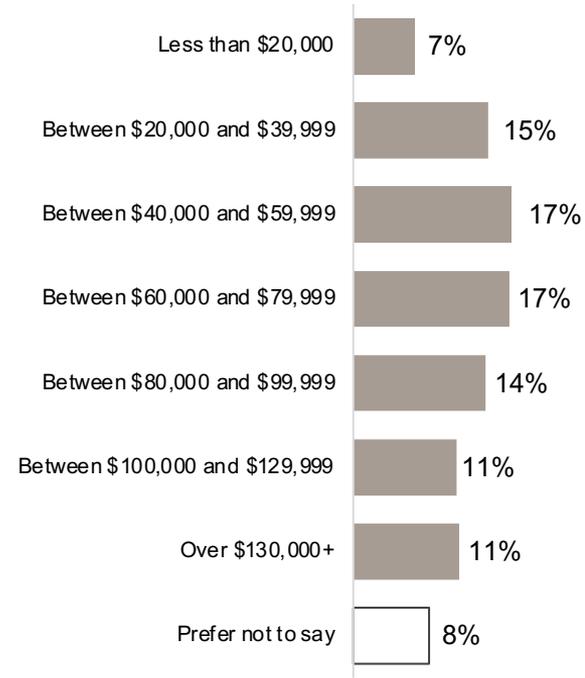
Employment & Income

Current Employment Status



Base: 18+ respondents (n=879); Question: *Would you describe yourself currently as... ?*

Household Income



Base: 18+ respondents (n=879); Question: *Thinking of 2019...was your annual household income for all persons in the household from all sources before taxes?*

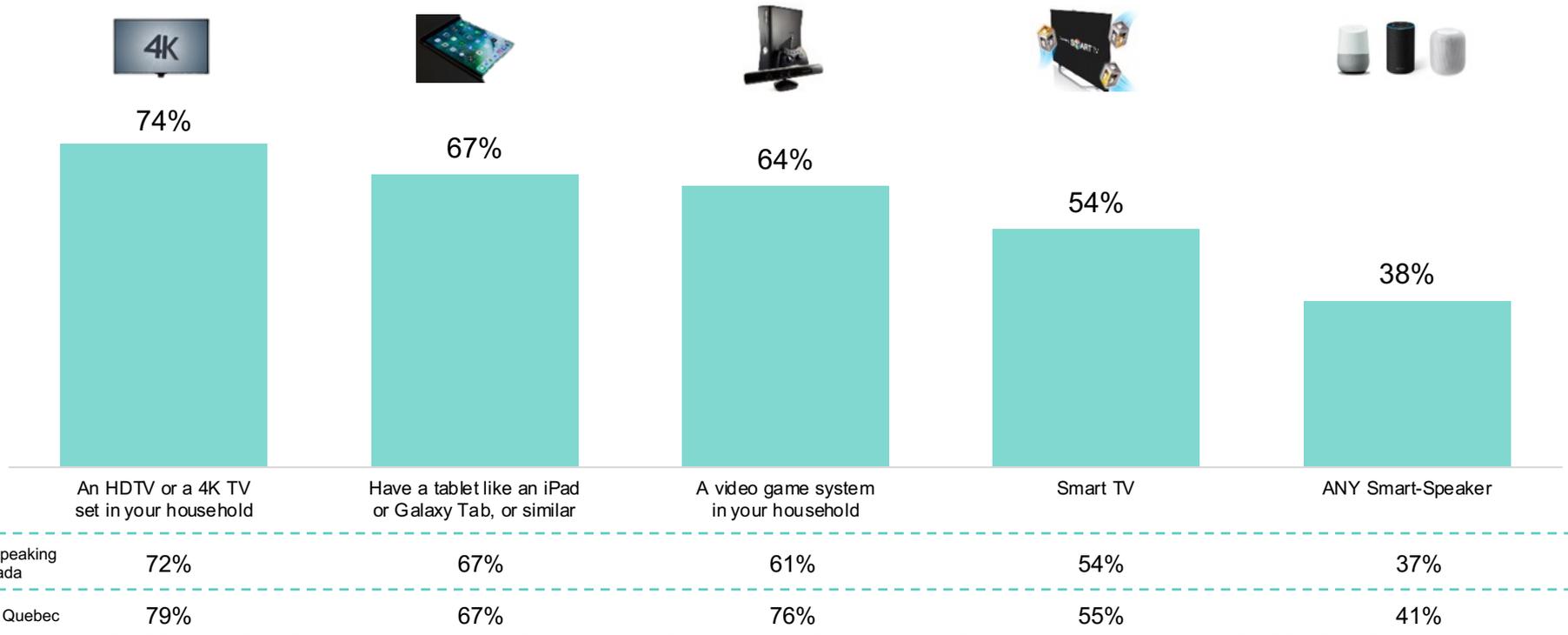
AVERAGE
\$74,539

Appendix: Home, Car & Personal Devices & Technographics



Household Ownership and Use

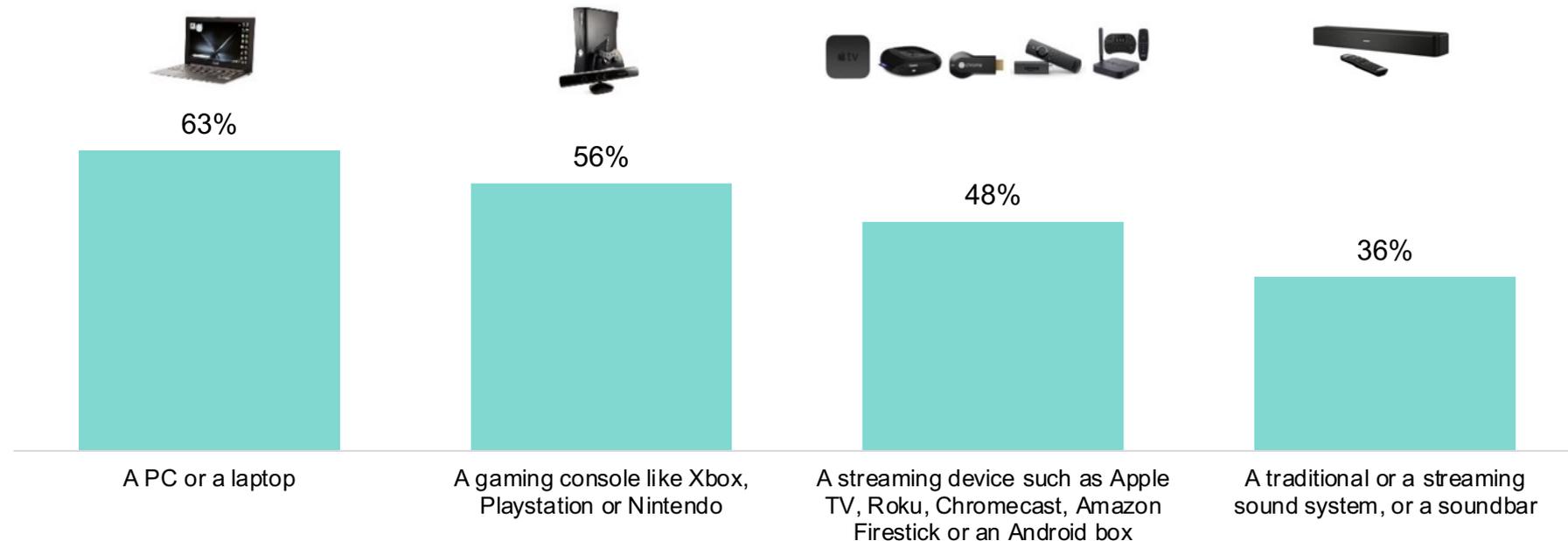
Screens and smart devices in Canadian households



Base: 12+ respondents (n=1000); Question: *Please check all the items below that you have...*; Question: *Does your household currently have any voice-activated smart home control devices – sometimes called a smart-speaker - such as the ones listed below?*; Question: *Many recent-model TV sets from LG, Samsung, Sony and others are ready for Internet connection when you buy them. These are sometimes called Smart TVs. These TVs easily connect to your home wireless network right out of the box. Do you have a Smart TV in your household?*; Question: *Do you personally have a tablet like an iPad or Galaxy Tab or similar*

What's attached to TVs in Canadian Households?

Connected TV ecosystem in households

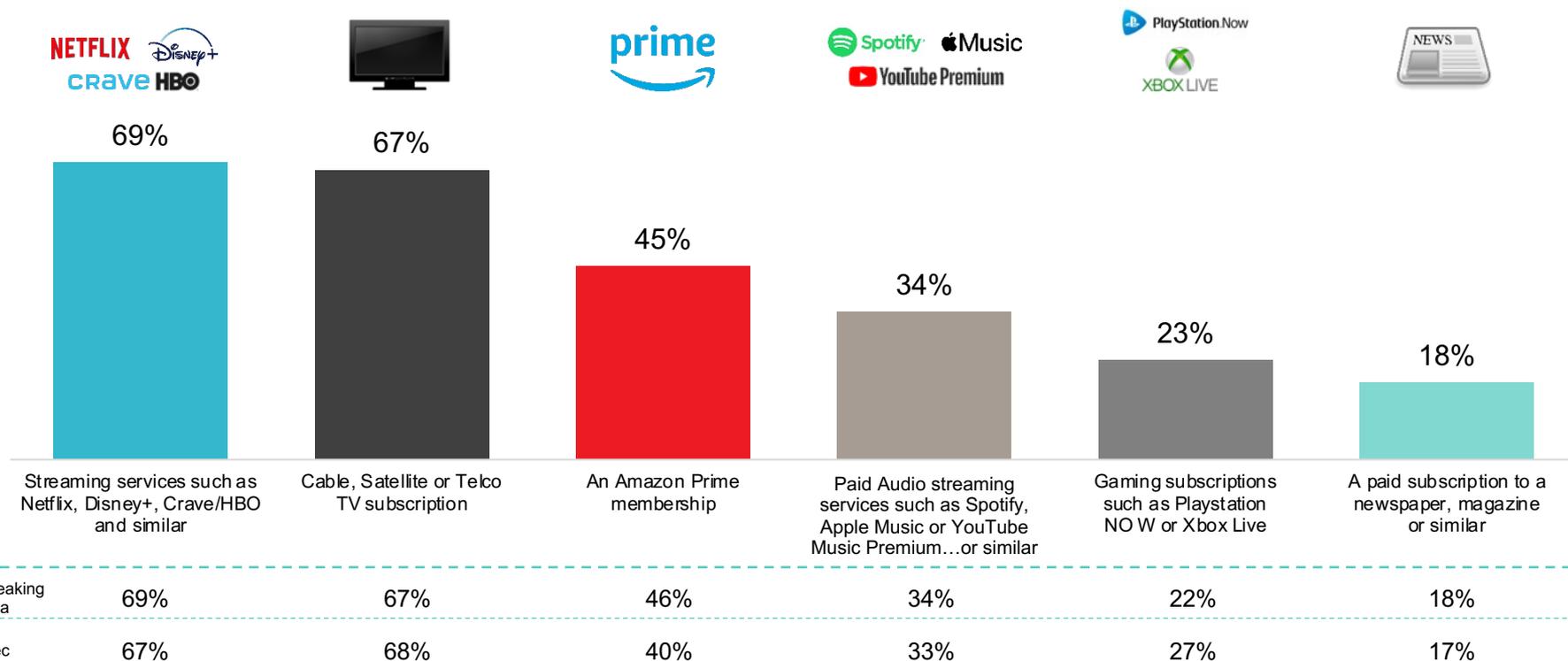


	A PC or a laptop	A gaming console like Xbox, Playstation or Nintendo	A streaming device such as Apple TV, Roku, Chromecast, Amazon Firestick or an Android box	A traditional or a streaming sound system, or a soundbar
English-Speaking Canada	63%	54%	48%	36%
Quebec	63%	63%	48%	38%

Base: 12+ respondents (n=1000); Question: Now thinking of the TVs in your house, are any of them connected to the following on a regular basis?

State of Household Subscriptions

Paid subscriptions in online households in Canada

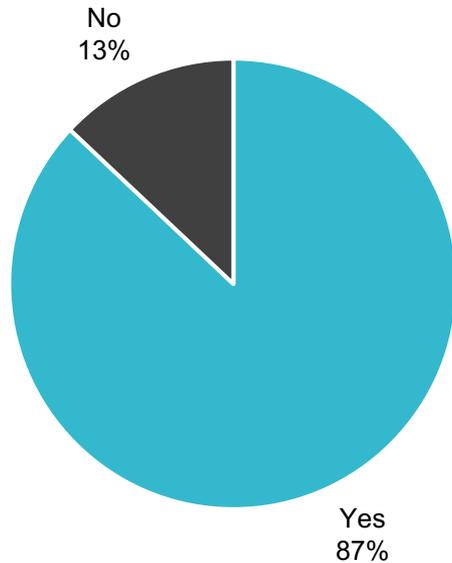


Base: 12+ respondents (n=1000); Question: Does your household have a subscription for paid TV service with a cable satellite, telco TV company?; Question: Do you have the following kinds of subscriptions in your home on a monthly subscription / pay basis?

Vehicles & Satellite Radio

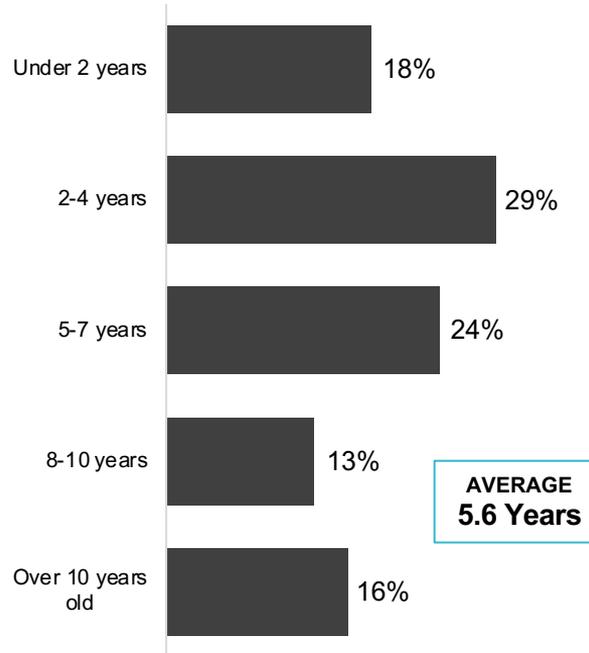
Household vehicle & SIRIUSXM penetration

Own or Lease a Vehicle



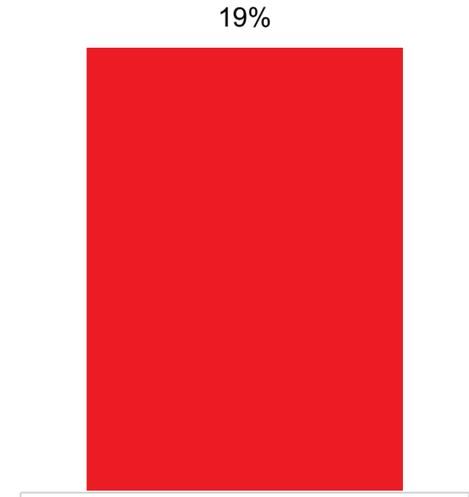
Base: 12+ respondents (n=1000); Question: *Do you / or someone in your household own or lease a vehicle, such as a passenger car or a SUV or a truck?*

Age of Vehicle



Base: 12+ has household vehicle (n=873); Question: *How old is the car/vehicle you have in your household? (IF YOU HAVE MORE THAN ONE, PLEASE THINK OF THE ONE THAT IS THE MOST RECENT MODEL)*

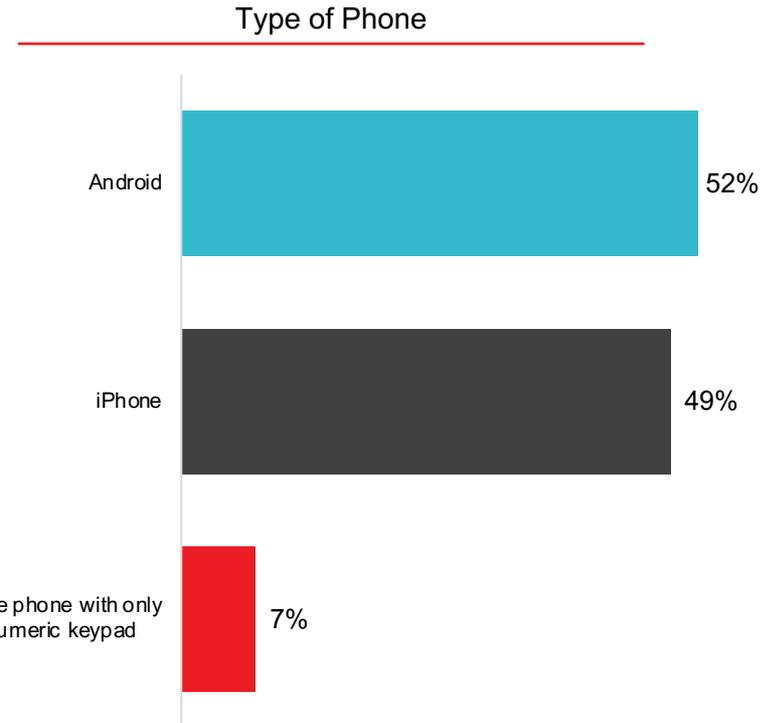
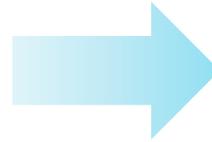
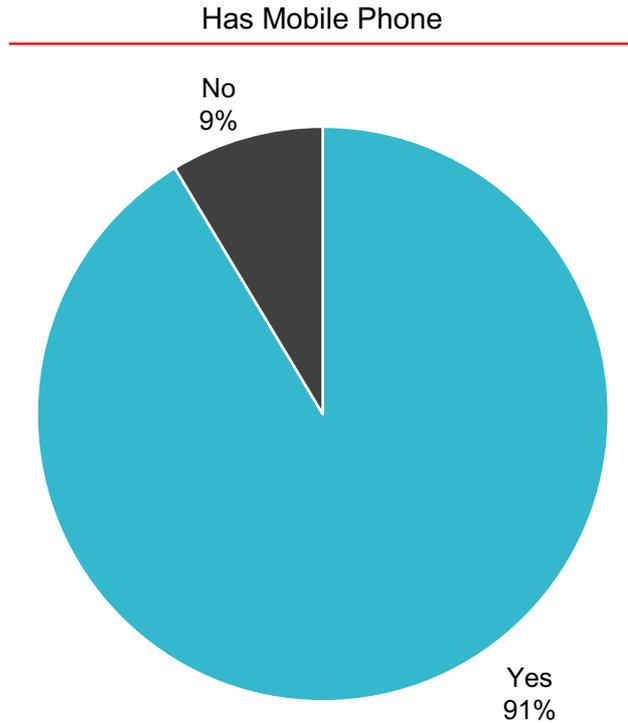
Has SIRIUSXM Satellite Radio



Base: 12+ has household vehicle (n=873); Question: *Do you have a SiriusXM satellite radio subscription / unit for the car?*

Personal Ownership and Use

Mobile phones

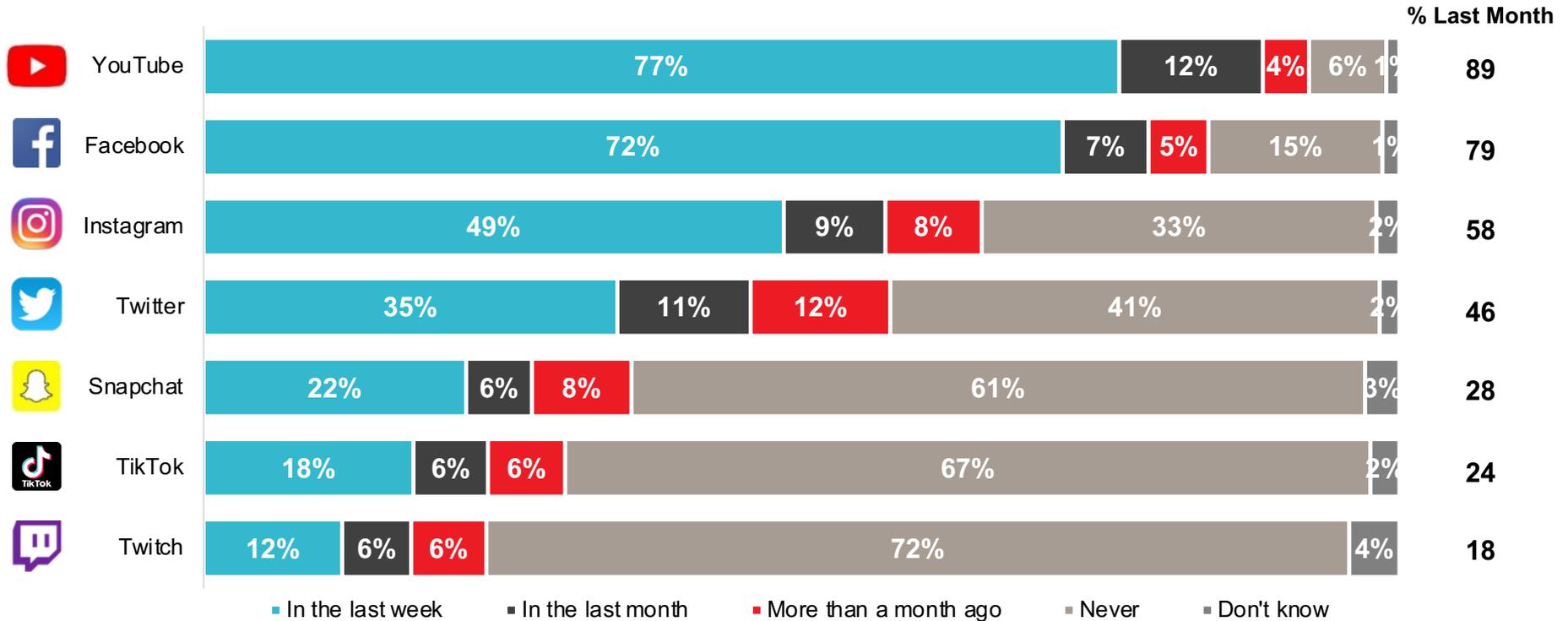


Base: 12+ respondents (n=1000); Question: *Do you personally have a mobile phone?*

Base: 12+ has mobile phone (n=923); Question: *Which of the following types of mobile phones do you have?*

Social Video & Media Use

Social media usage



Base: 12+ respondents (n=1000); Question: *How recently, if ever, have you visited or used the following...?*