



RADIO CONNECTS TO CONSUMERS 2019

Wave 2 – An Expanded Study.

In field May – June 2019.



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



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



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

Glossary of Terms.

Definition of terminology used in questionnaire.



AM/FM Streaming

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



Programmed Music

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



Personal Music

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



Podcasts

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




Statement questions explained.

81 statements asked
on a 5 point scale.

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

Strongest statements
by composition and
index are represented.



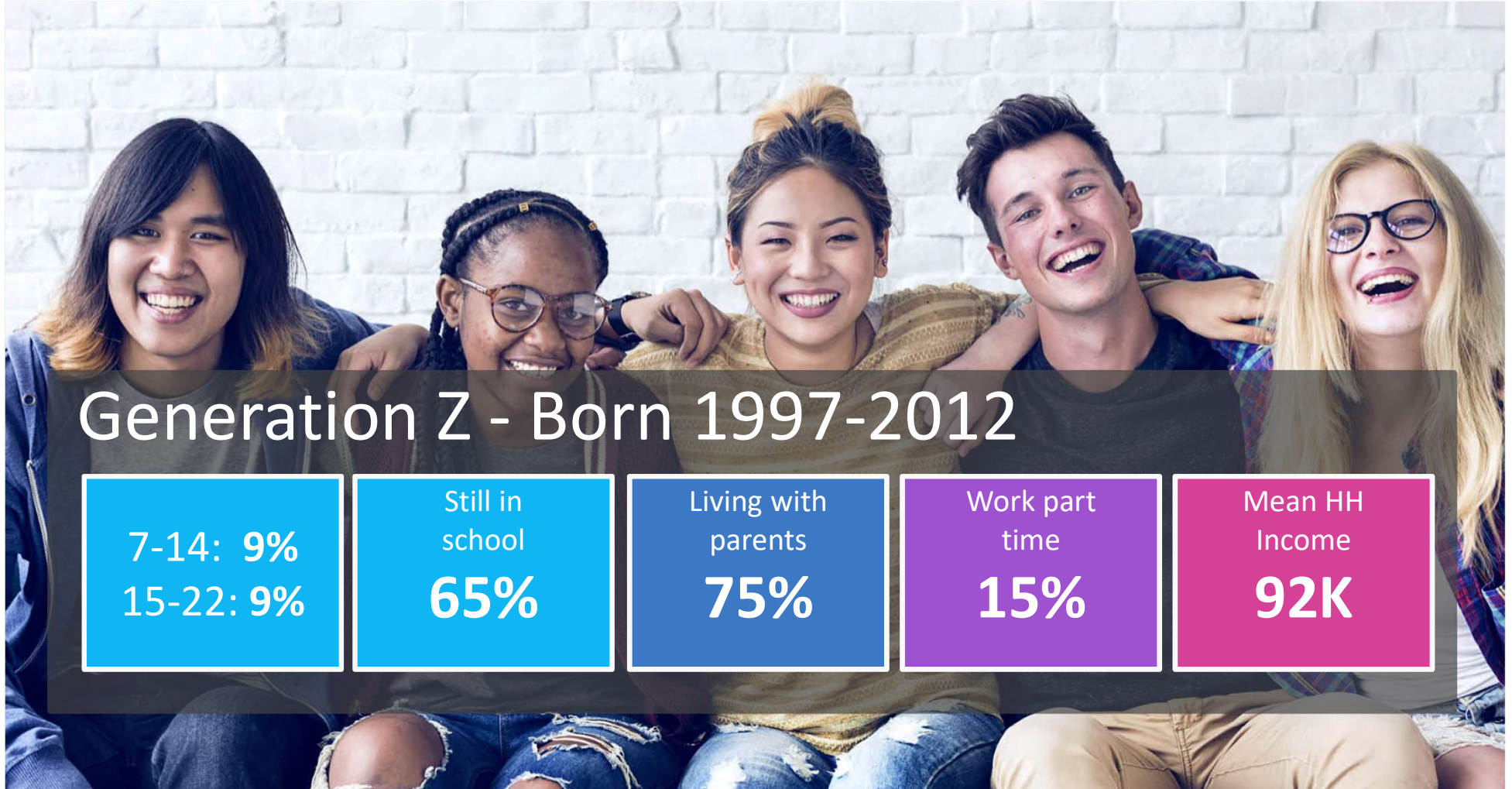
Generations Connect Differently

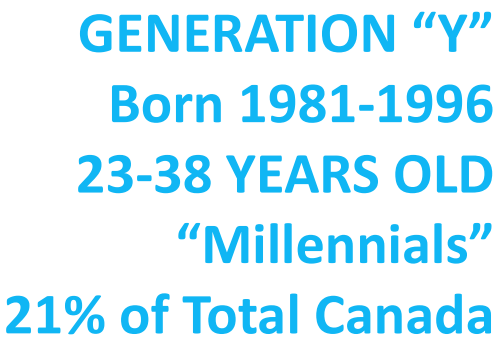
Currency target groups do not adequately reflect how different generations behave or what motivates them to engage with media.

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



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





GENERATION “Y” - Born 1981-1996

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

23-29
(9%)



Maturing Millennials 1990 – 1996

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

University
44%
(136i)

Masters
13%
(93i)

Live with partner
43%
21%
with parents

Work full time
74%
(138i)

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

30-38
(12%)



Milestone Millennials 1981-1989

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

College
22%
(104i)

University
40%
(121i)

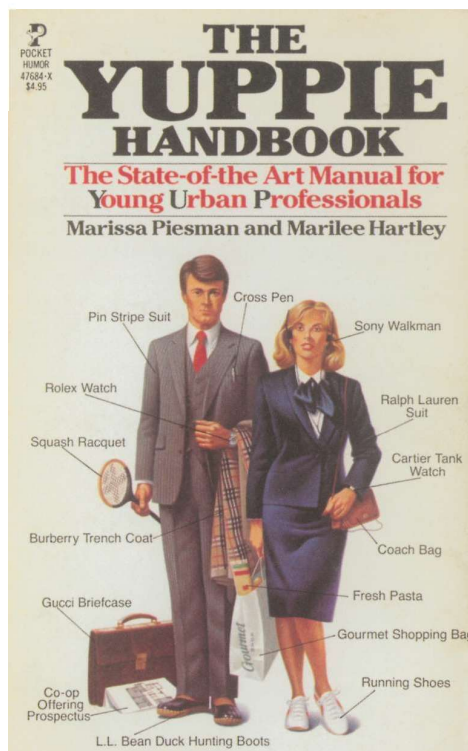
Masters
17%
(123i)

Child<5yrs
19%
(154i)

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



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



GENERATION “X” - Born 1965 – 1980

An analogue childhood to a digital adulthood

39 – 47
(12%)



Advancing Gen X 1972-1980

Mean HH
Income
106K

Mean Pers.
Income
71K

Col./Univ.
61%
(114i)

Tweens or
Teens
34%

Have Kids
6-15
30%

48 – 54
(10%)



Established Gen X 1965-1971

Mean HH
Income
112K

Mean Pers.
Income
75K

Col./Univ.
61%
(114i)

Tweens or
Teens
35%

Adult kids at
home
26%



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

BABY BOOMERS - Born 1946-1964

The generation that broke the mold.

55-65
(15%)



Freedom 55+ 1954-1964

Mean HH
Income
98K

Mean Pers.
Income
79K

Work P.T.
11%
(102i)

Retired
39%

Adults kids at
home
14%
(152i)

66-73
(8%)



OAS Boomers 1946-1953

Mean HH
Income
66K

Mean Pers.
Income
53K

Work P.T.
9%
(102i)

Retired
83%

Live alone
25%
(124i)

Canadians Across Generations Are Connected To Audio



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

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

Canadians remain connected to audio.

Key Findings:

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

Canadians 15+

82%

Tuning to audio
year over year has
been consistent

83%

Listen in AM/FM
past week

46%

Listened to
Personal Music
yesterday

23%

Listened to a
Podcast in the
past week



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

Key Findings:

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

22%

Gen Z didn't use Facebook in past 12 months

38%

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

37%

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

59%

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

Canadian consumers connect with radio for specific reasons.

Key Findings:

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

Canadians 15+

73%

AM/FM keeps me up to date with latest news

70%

Keeps me up in touch with what's happening locally

61%

Connects me to my community

44%

Listen for traffic and weather

Each generation connects for its own reasons.

Key Findings:

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

Canadians 15+

29%

Wake up to
AM/FM radio

64%

Always listen on
their commute

58%

Always listen for
traffic and
weather

20%

Stream AM/FM
while at work

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

Key Findings:

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

Canadians 15+

83%

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

42%

Listened on a mobile device

44%

Listened on a desktop or laptop computer

31%

Listened over a Smart Speaker



Radio listening is digital for Gen Z.

Smart Phone/Tablet

50%

(119i)

Desktop/Laptop

46%

(106i)

Smart Speaker

36%

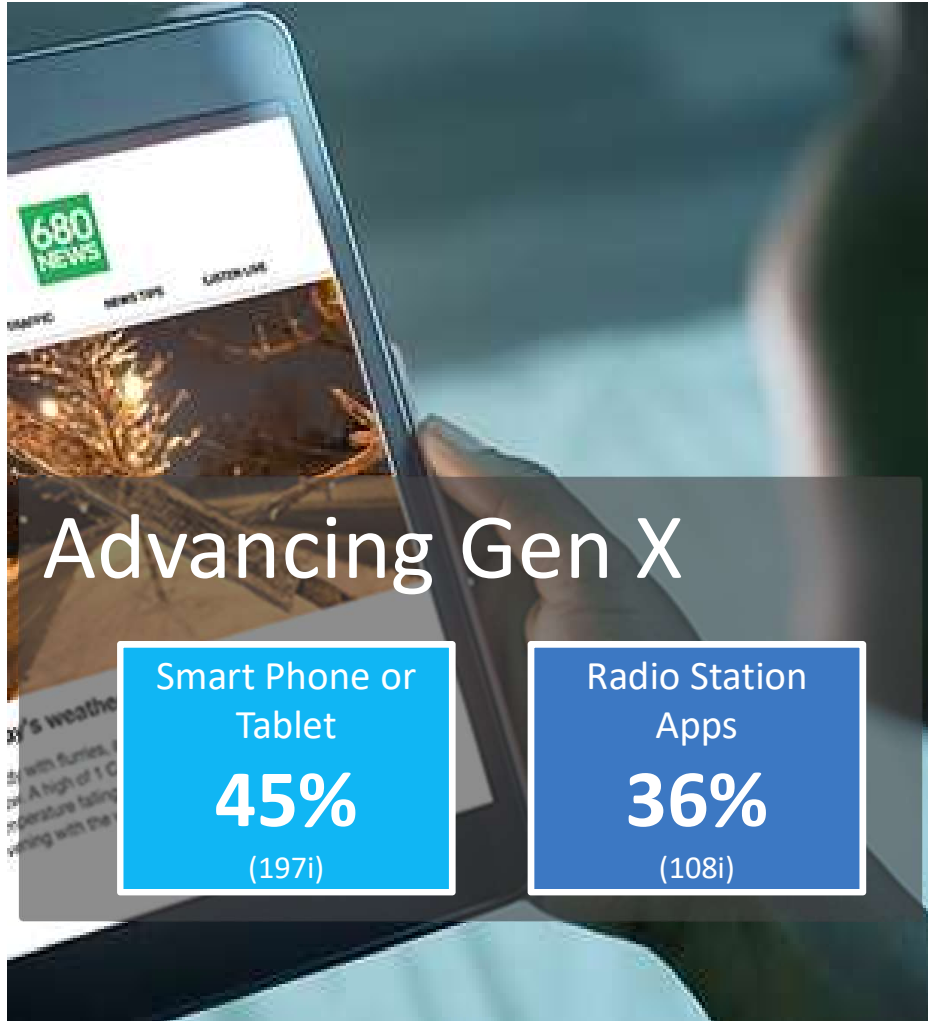
(117i)

Radio App

32%

(96i)





Radio is where Canadians discover new music.

Key Findings:

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

Canadians 15+

59%

Discover new music through AM/FM radio

39%

Discover new music through family and friends

34%

Discover new music on YouTube

20%

Discover new music via Social Media or Spotify

Personal music is about disconnecting.

Particularly amongst young Canadians.

Key Findings:

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

Canadians 15+

56%

It's commercial free

53%

Like it match their moods

46%

Can access it anywhere



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

22%

Canadians 15+

41%

Gen Z (182i)

39%

Mat. Mill. (175i)

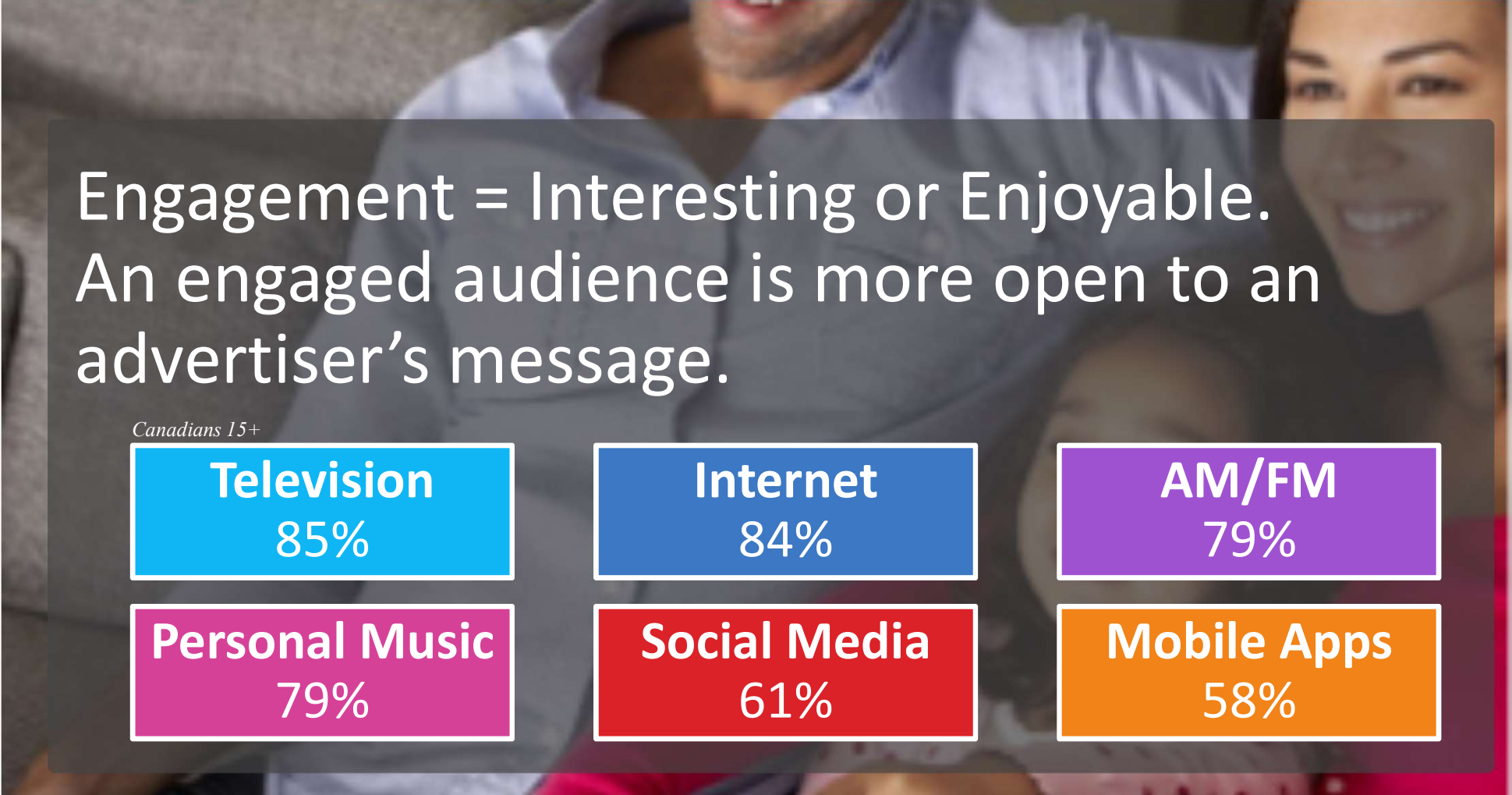
34%

Mile. Mill. (152i)

Radio Engages With Canadian Consumers



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



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

Canadians 15+

Television

85%

Internet

84%

AM/FM

79%

Personal Music

79%

Social Media

61%

Mobile Apps

58%



When are Canadians paying attention?

Canadians 15+

Using the
Internet

82%

Watching
Television

78%

Listening to
Radio

64%

Using Social
Media

54%

Interest and attention changes with age.

Younger generations
*pay most attentional to
digital platforms.*

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

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

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

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

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

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

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

Truth in advertising.

Key Findings:

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

Canadians 15+

60%

Like Factual Advertising

51%

Expect Ads To Be Entertaining

45%

Advertising helps me know what's available

45%

Positive info can change my mind

Ad avoidance is real.

Key Findings:

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

Canadians 15+

31%

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

23%

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

14%

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

Digital ads are the most avoided content.

Key Findings:

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

Canadians 15+

85%

Use skip add feature on video ads when available

81%

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

68%

Hide sponsored ads on social media sites

65%

Block or mute companies who advertise on social media sites

Digital incognito.

Canadians are feeling tracked online.

Key Findings:

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

Canadians 15+

61%

Tracked online
because of
conversations

68%

Tracked online
because of stores
visited

71%

Would click do not
track if available
on social media

71%

Tracked for items
researched or
purchased

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

Key Findings:

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

Canadians 15+

19%

Agree Social Media ads **ARE** relevant

39%

Disagree Social Media ads **ARE** relevant

46%

Agree Social Media ads are **NOT** relevant

10%

Disagree Social Media ads are **NOT** relevant

Gen Z

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

27%

Agree

28%

Disagree

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

41%

Agree

14%

Disagree

Maturing Millennials

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

30%

Agree

20%

Disagree

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

36%

Agree

18%

Disagree

Milestone Millennials

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

29%

Agree

25%

Disagree

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

42%

Agree

15%

Disagree



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

Canadians 15+

58%

Makes me feel like my
online behaviour is being
watched

42%

Serves me ads that feel
too personal

42%

Serves me online ads from
places where I've been

Finding the right moment and tone to talk.

Canadians 15+

To Be Entertained

Audio 68%
TV 66%
Internet 39%

To Lift My Mood

Audio 61%
TV 31%
Internet 17%

Keep Up With New & Gossip

Audio 53%
TV 44%
Internet 43%

To Pass The Time

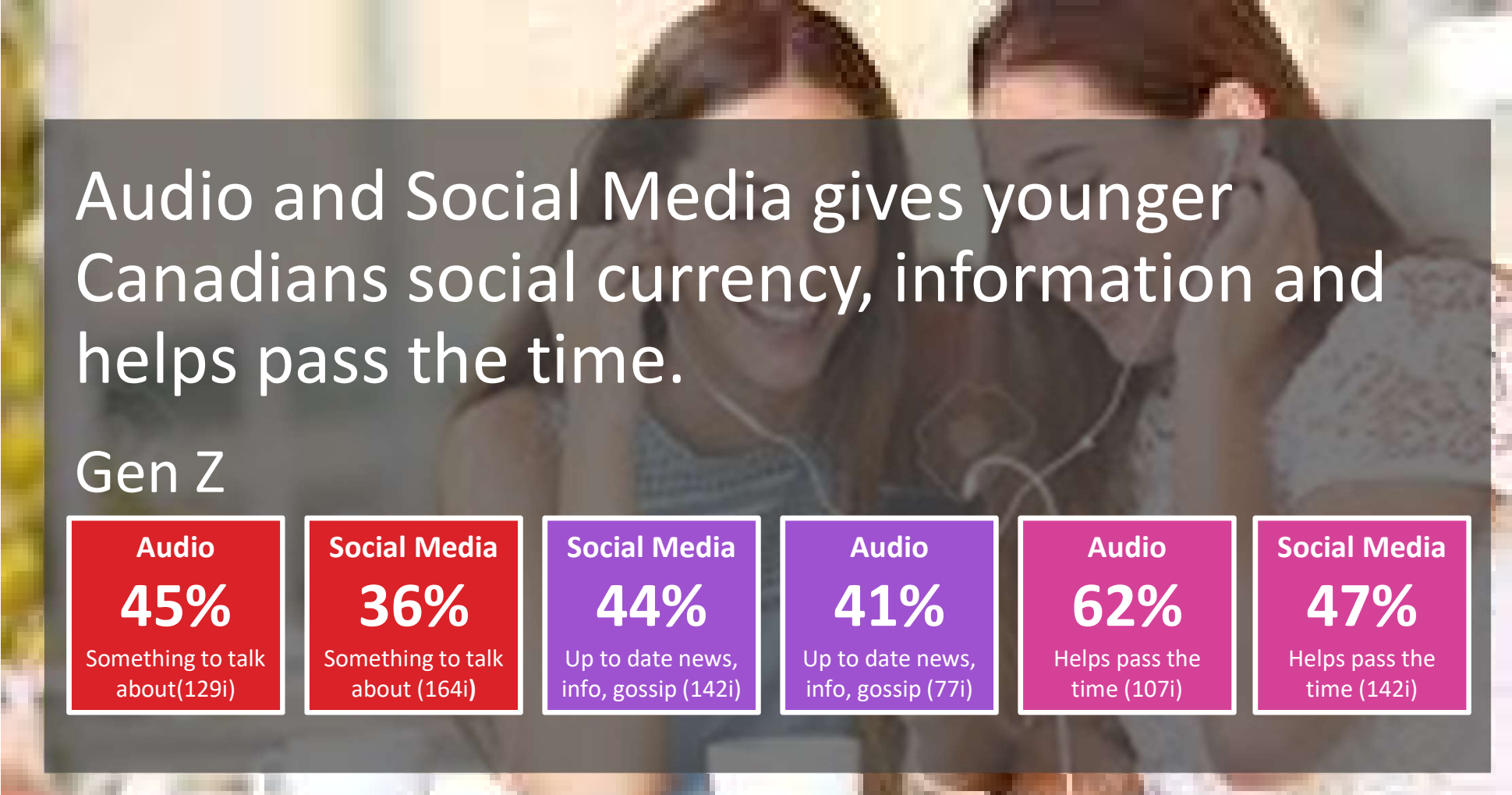
Audio 58%
TV 54%
Internet 41%

Something To Talk About

Audio 35%
TV 31%
Internet 28%

To Check Prices

Internet 63%
Mobile 25%
Audio 9%



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

Gen Z

Audio

45%

Something to talk about (129i)

Social Media

36%

Something to talk about (164i)

Social Media

44%

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

Audio

41%

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

Audio

62%

Helps pass the time (107i)

Social Media

47%

Helps pass the time (142i)

Maturing Millennials

Audio

40%

Something to talk about
(114i)

Social Media

30%

Something to talk about
(136i)

Audio

48%

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

Social Media

44%

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

Audio

63%

Helps pass the time (108i)

Social Media

51%

Helps pass the time (155i)

Milestone Millennials

Audio

37%

Something to talk about
(106i)

Social Media

22%

Something to talk about
(127i)

Social Media

42%

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

Audio

39%

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

Audio

61%

Helps pass the time (102i)

Social Media

42%

Helps pass the time (127i)

The background of the slide features a close-up, slightly blurred image of several vintage microphones, likely from the mid-20th century, arranged in a row. The lighting is dramatic, highlighting the metallic surfaces and the classic design of the microphones.

Radio sets the mood.

Maturing Millennials **41%**

(104i)

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

Advancing Gen X

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

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

Radio keeps **Freedom 55+**

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



The Upside of Social Media

Canadians 15+

Amused

78%

Inspired

64%

Connected

63%

Q. 34 Content on social media makes me feel (frequently, sometimes)

The Downside of Social Media

Canadians 15+

Angry

62%

Cynical

60%

Lonely
Gen Z

40%

(142i)

Lonely
Mat.Mill.

45%

(160i)

Lonely
Mile.Mill.

40%

(145i)

Depressed

38%

Lonely

28%

Depressed
Gen Z

44%

(116i)

Depressed
Mat.Mill.

52%

(139i)

Depressed
Mile.Mill.

47%

(126i)

Attribution



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



Start at the beginning.

NOTICE

REMEMBER

TRUST

FIND OUT
MORE

ABC

People absorb information differently.

Canadians 15+

44%

Something I've
read

38%

Something I've
watched

18%

Something I've
heard

Younger Canadians are audible learners.

Gen Z

28%

(157i)

All Millennials

22%

(122i)

Gen X

20%

(112i)

Gen Z

48% (112i)

Hearing a brand name helps me remember it

All Millennials

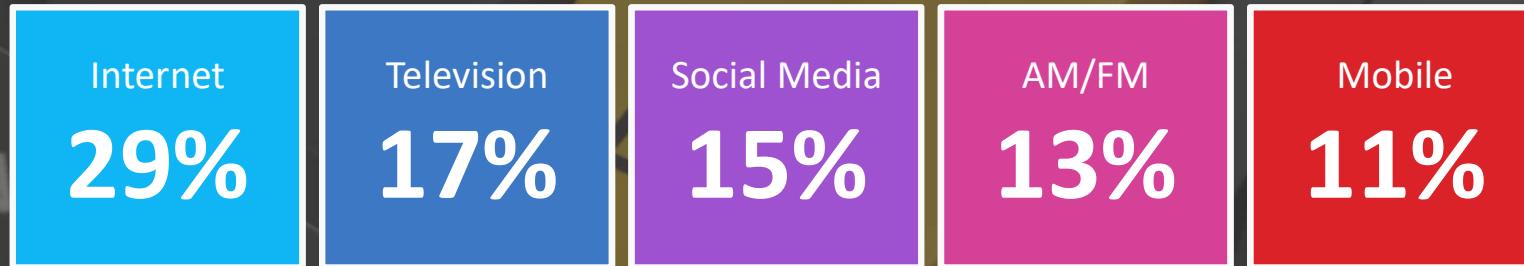
51% (109i)

Remember radio jingle ads



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

Canadians 15+





Ads are REMEMBERED on mass media.

Canadians 15+

Television

35%

AM/FM Radio

28%

Internet

21%

Social Media

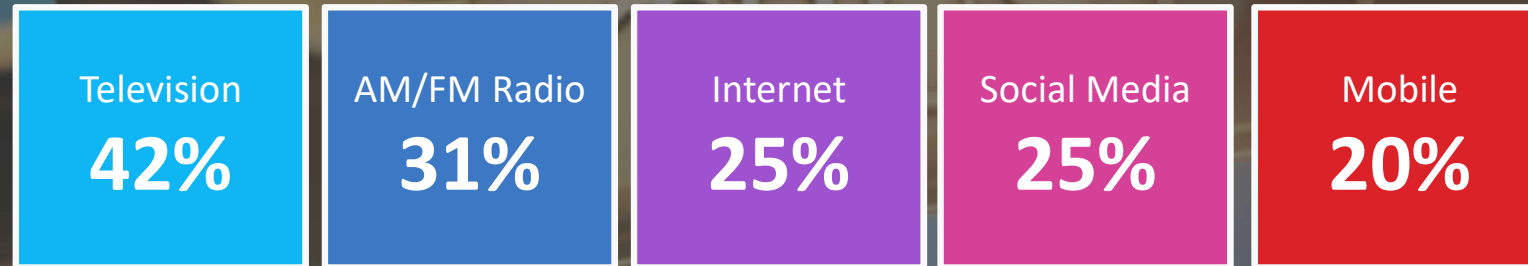
16%

Mobile

14%

Mass media confers trust for brands.

Canadians 15+



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

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

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

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

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

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

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

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



Radio Connects With Generations of Shoppers

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



All Canadians agree.

Canadians 15+

Hard to make
decisions with
too many choice

38%

Private Label
brands are just
as good

48%

Enjoy
browsing in
store

49%

Like being
rewarded by
brands

73%



Generation Z

Approve of
brands I buy

36%

(187i)

Buy product
online vs. visit
store

32%

(148i)

Hard to make
decisions with
too many choice

48%

(126i)

Researched online (past week):

Clothing **42%** (140i)

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

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

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

Maturing Millennials

Approve of the
brands I buy

32%

(163i)

Hard to make
decisions with
too many choices

55%

(146i)

Rather buy
products online
vs. a retail store

30%

(139i)

Enjoy browsing in
store

56%

(115i)

Purchased Online (Past month):
Groceries **47%** (139i) | Clothing
40% (125i) |
QSR **32%** (140i) | Beauty
products **27%** (150i)

Milestone Millennials

Rather buy
products online
vs. a retail store

36%

(170i)

Approve of the
brands I buy

27%

(140i)

Hard to make
decisions with
too many choices

48%

(128i)

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

34%

(114i)

Purchased Online (Past month):
Groceries **42%** (122i) | Clothing
38% (119i) |
Household products **28%**
(113i) | QSR **28%** (125i)



Gen X

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

34%
(122i)

Buy product
online vs. visit
store

26%
(122i)

Advancing Gen X

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

Advancing Gen X

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

Boomers

Rather buy products online

12%

(55i)

Approve the brands I buys

13%

(69i)

Too much choice

30%

(79i)

Buy on credit than wait

27%

(90i)

Freedom 55+

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

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

Radio works in tandem with the internet.

Canadians 15+

Checked things
out on the
internet after
hearing radio ad

46%

Radio ads have
prompted me to
do a search for
something

34%

Visited websites
of radio
advertisers

28%

Purchased a
product online
after hearing a
radio ad

20%

Radio informs consumer behaviours.

Canadians 15+

Helps me
discover stores
or services in my
town or city

45%

Radio lets me
know about
limited time
offers

33%

Reminds me of
brands or
products I might
need

27%

Recommended
product/service
heard advertised
on radio

21%

Radio amplifies shopping behaviours.

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



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

Reminds all Canadians about brands/products they might need.



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

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



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

Radio Works

1

Generations.

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

2

Audio connects all generations.

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

3

Personal music means disconnecting.

It's about control and instant gratification.

4

Radio is interesting and enjoyable.

To be attentive is to be engaged.

5

Ad avoidance.

Younger Canadians take control of their ad exposure.

6

Digital Incognito.

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

7

The Ups and Downs of Social Media.

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

8

Young Canadians are audible learners.

Triggers audio sensory meridian responses.

9

Internet gets the credit.

Ads get noticed and remembered most on television and radio.

10

Radio and internet are complementary.

Ads on radio drive consumers to the internet.

11

Radio informs online shopping behaviour.

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

Thank You.

Radio Connects

160 Bloor Street East

Suite 1005

Toronto

Phone: 416 787 7756

www.radioconnects.ca



@radioconnects



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