



Attitudes and opinions towards commercial radio in Canada

EXECUTIVE SUMMARY

Prepared for the Canadian Radio-television and Telecommunications Commission

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This public opinion research report presents the results of a series of focus groups and an online survey conducted by Ipsos Public Affairs on behalf of the CRTC. The research study was in two phases including a qualitative phase conducted with 88 participants across 13 focus groups (9 in English, 4 in French) between March 19 and 31 2020 and a quantitative phase with 1735 Canadians 18 years of age or older between November 12 and 26 2020.

Cette publication est aussi disponible en français sous le titre : Attitudes et opinions à l'égard de la radio commerciale au Canada

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A handwritten signature in black ink, appearing to read "M. Colledge", with a stylized flourish at the end.

Mike Colledge
President
Ipsos Public Affairs

KEY FINDINGS

The purpose of this public opinion research (POR) was to better understand Canadians' attitudes, opinions, and behaviours as they relate to radio habits and listening and satisfaction with the listening experience and commercial radio. The research also measured support for Canadian content and French-language music rule requirements, and views about regulation, ownership, and content requirements more generally.

At seven in ten (68%), the vast majority of Canadians report listening to commercial radio on at least a weekly basis, the most of any broadcast platform, including four in ten (39%) who listen daily.

- *In comparison, four in ten (39%) report listening to streaming music services on a weekly basis, one third (32%) CBC Radio/ ICI Radio-Canada and approximately two in ten for either satellite radio (17%) or podcasts (22%).*
- *Car radio is by far the most commonly used device to listen to commercial radio (80%) followed by those who listen on a traditional radio (38%). Relatively few listen to commercial radio through another device (i.e. computer, smartphone, home speakers, etc.).*
- *In the qualitative research, we learned that many listen to commercial radio going to and from work, at work, and some listen at home. Further, many have changed their listening habits over the years because of new formats and content available, particularly among younger listeners.*

Commercial radio is considered the most important broadcast platform for Canadians to have access to (45% 8-10 on 10 pt scale), specifically for the music (64%) and local news content (57%).

- *Considerably fewer feel having access to CBC Radio/ ICI Radio-Canada (28%), streaming music services (28%), podcasts (19%) or satellite radio is particularly important to them.*
- *Other important aspects of commercial radio include having access to weather (51%), national news (48%) and to a lesser extent international news (40%). Access to talk/radio (22%) or phone-in games or contests (10%) are considered much less important to Canadians.*
- *In the qualitative research, three key functions of commercial radio for listeners emerged – the first is purpose driven, such as finding out news, weather and traffic; the second is as background in which listeners play the radio to create a sense of atmosphere, comfort and community; and the third is to facilitate their enjoyment of music*

Commercial radio listeners are generally satisfied with the listening experience (47% 8-10 on 10 pt scale) and impressions are strongest for the availability of programming in the listeners' preferred language (66%) and the quality (48%) and frequency of information (45%).

- *Satisfaction with the listening experience is very consistent among those who report listening to each platform- highest for streaming music services (54%), followed by CBC Radio/ ICI Radio-Canada (48%), podcasts (47%), commercial AM/FM radio (47%) and satellite radio (42%). Few are dissatisfied with the listening experience across all platforms.*
- *The fact commercial radio is free of charge is by far the thing Canadians like most about it (60%), followed by the convenience and simplicity (30%), the connection it gives them to their local community (30%), variety of music genres (27%) and a reliable source of information (26%).*
- *In the qualitative research, we found that commercial radio is positively perceived by listeners as an enjoyable and entertaining medium that has a variety of musical genres available and is considered a good source of high-level news and information.*

Satisfaction with commercial radio is considerably lower for the variety of programming (35% 8-10 on 10 pt scale), diversity of songs, genres or artists (32%) and promotion of Canadian artists (30%)

and most believe that commercial radio is too focused on popular music (51% strongly/ somewhat agree).

- *The most common suggested areas for improvement include having fewer commercials (43%), more diverse musical content (32%), more local content (20%) and more timely news coverage (18%).*
- *Opinions are more mixed about the quality of programming (41%) and the availability of local content (39%). Qualitatively, some believe that commercial radio is a good source of local news, while others believe that there could be more local information added to newscasts.*
- *The qualitative research also found that perceptions of diversity in commercial radio are mixed. While some believe there is good diversity available including exposure to local and new artists, others believe that commercial radio could be improved by increasing these. Many believe that certain songs are played repetitively and experience fatigue as a result.*

Canadians exhibit a strong sense of patriotism towards the promotion of Canadian artists and music and feel it is essential to ensuring a strong Canadian culture (62% strongly/ somewhat agree). Sentiment towards promoting French-language music is even stronger among Francophones and the vast majority feel it is essential to ensuring a strong French-language culture in Canada (72%).

- *Most Canadians feel it is important that we continue to promote Canadian artists through content rules (60%) and that more should be done to promote new and emerging Canadian artists on commercial radio (51%). However, many also admit that they don't pay a lot of attention to whether the artist is Canadian or not when listening to music (58%).*

Support for current Canadian content and French-language music rules for commercial radio is strong and highest for popular music (60% strongly/ somewhat support) and French-language music (60% among Francophones), followed by special interest music rules (53%). Attitudes are more mixed, however, regarding whether the percentage of required content should increase in the future.

- *Most feel the percentage of Canadian music content should stay the same for popular music (44%), special interest music (41%) and a lesser extent French language vocal music (35%). Around one-third feel the percentage should increase for French-language vocal music (36% among Francophones), special interest music (34%) or popular music (31%).*
- *In the qualitative research, awareness of Canadian content rules was mixed to low and most were neutral to positive in their reactions to the idea of exposing Canadian artists, both to benefit the artists themselves, and Canadian culture more generally. Some felt that the current percentage requirements were sufficient, while others felt the numbers could or should be raised. Support for French-language content rules in French-language markets was almost universal, as they were seen as instrumental in promoting French-language culture.*

Most agree that streaming music services should be required to support the Canadian broadcast sector (53% strongly/ somewhat agree) but feel that any future regulations should not interfere with consumers' ability to choose the content they want (68%).

- *In terms of specific requirements, the majority of Canadians support requiring streaming services to contribute financially towards the Canadian broadcasting system (54% strongly/ somewhat support) or requiring streaming services to ensure a minimum amount of Canadian content is included on their playlists on a weekly basis (50%). Relatively few oppose either proposed requirement.*

- *The qualitative research also showed that many were supportive of having streaming services contribute financially to the Canadian music industry, as they believed that homegrown artists should be supported.*

Awareness of commercial radio station ownership is relatively low. However some concern exists about concentration of ownership and that it may limit the diversity of opinions and music available or limit Canadians access to different sources of information.

- *Nearly half (47%) of Canadians do not know which companies operate the radio station(s) they listen to, while three in ten do (31%) and two in ten (22%) know some but not for all stations.*
- *Four in ten (42% very/ somewhat concerned) express concern about the concentration of ownership of commercial radio stations in Canada of which most are somewhat concerned (31%) and nearly half of Canadians feel that concentration of ownership will limit the diversity of opinions and music genres available to Canadians (46%) or that it will limit access to different sources of information and impact our ability to remain well informed (45%).*
- *In the qualitative research, awareness of the ownership of commercial radio stations was low and perceptions were that they are typically owned by large media conglomerates. Most were unconcerned with who owns commercial radio stations, and it is not a factor in driving which stations they currently listen to. Upon reflection, a greater concentration of ownership was a concern for some, who felt that this may result in more overall media bias, homogeneity of format, or less local content; others were unconcerned about the concentration of ownership so long as their enjoyment of listening to the station is unaffected.*

Differences by Demographics

- **Region of residence:** The most consistent differences in attitudes are observed between those who reside in Quebec and those who reside in the rest of Canada. Those who reside in Quebec are more likely to agree that promoting French-language artists on commercial radio is essential to ensuring a strong French-language culture in Canada and that it is important to continue promoting Canadian content on commercial radio through Canadian content rules. Those who reside in Quebec are far more likely to pay attention to whether the artist is Canadian or not when listening to music, are less satisfied with the availability of commercial radio programming in their preferred language and are more likely to feel the percentage of Canadian content required should increase in the future. They are also more likely to support requiring streaming services to ensure a minimum amount of Canadian content is included in their playlists on a weekly basis.
- **Age cohorts:** The youngest generation (Gen Z, 18-23) is less likely to listen to commercial radio on a regular basis, feel it is important to have access to it and express satisfaction with most aspects of the listening experience. They are less likely to feel it is important to have access to local, national or international news, weather or traffic on commercial radio and more likely to mention diversity, exposure to new artists, or more Canadian music as aspects of commercial radio that need to be improved. Gen Z is also most likely to believe that promoting French-language artists is essential to ensuring a strong French-language culture in Canada.
- Boomers (56+) are more likely to support the current French-language content rules, requiring streaming services to contribute financially towards the Canadian broadcasting system and ensuring a minimum amount of Canadian content is included on streaming services weekly playlists. Boomers are least likely to feel as though there is not enough programming offered on commercial radio in their preferred language.

- **Indigenous status:** Indigenous respondents are more likely to feel there is not enough commercial radio programming being offered in their preferred language and that they want more Canadian music and content in their preferred language on commercial radio. They are less likely, however, to agree that it is important to promote Canadian artists specifically through Canadian content rules.
- **Born in Canada:** Those born in Canada are more likely to listen to commercial radio on a frequent basis, to feel having access to commercial AM/FM radio is important (8-10 on 10 pt scale) and to be satisfied with the listening experience. They are more likely to be satisfied with the availability of programming in their preferred language, the availability of local content from where they live, the frequency of information, and the quality of programming.
- Those born outside Canada are more likely to feel having access to international news on commercial radio is important and that they would like more access to content in their preferred language on commercial radio. They are also less likely to agree that promoting Canadian artists and music is essential to ensuring a strong Canadian culture and to feel that streaming music services should be required to support the Canadian broadcast sector.

Differences by Official Language

- Francophones are more likely than Anglophones to believe promoting Canadian artists is essential to ensuring a strong Canadian culture and promoting French-language artists is essential to ensuring a strong French-language culture in Canada. They are more likely to agree that it is important to continue to promote Canadian artists through Canadian content rules, to support current rules and to want to see the percentage of required content increase in the future. They are also more likely to think streaming music services should be required to support the Canadian broadcasting sector.
- Francophones are also more likely to feel as though more should be done to promote new Canadian artists on commercial radio, don't feel there is enough local content offered on commercial radio, or available in their preferred language and think commercial radio is too focused on popular music. They are also more likely to and do express concerns about the concentration of private radio station ownership.

Differences by Radio Listenership

- Commercial radio listeners are more likely than non-listeners to believe that promoting Canadian artists and music is essential to ensuring a strong Canadian culture, to feel it is important to continue promoting Canadian artists through content rules and to want the percentage of Canadian content to increase in the future. They also express stronger support requiring streaming music services to support the Canadian broadcast sector.
- They are also much more likely than non-listeners to think there is insufficient local content on commercial radio and that more should be done to promote emerging Canadian artists on commercial radio.

Differences by Source of Content

- Online commercial radio listeners are more likely than those who listen offline to feel having access to commercial AM/FM radio is important to them and specifically access to talk radio, phone-in games, current affairs or international news content. Support for Canadian content requirements for popular music is higher among those who listen to commercial radio online than offline. They are also more likely to feel there is not enough programming offered in their

preferred language on commercial radio and to want greater exposure to new artists and more programming variety.

- *Online is defined as using smartphone, smart speakers, desktop computer, laptop or tablet at listen to commercial radio, while offline is defined as using car radio, traditional AM / FM radio or home sound system.*

Panel vs. Voluntary Public Survey Results

- Attitudes, opinions, and behaviours as they relate to radio habits and listening differ greatly among those who completed the voluntary public survey compared to the panel survey. Those who completed the voluntary survey are more likely to listen to commercial radio regularly and to feel having access to it is important. However, they are generally less satisfied with the listening experience including the quality of programming, programming diversity, promotion of Canadian artists, and the availability of programming in their preferred language.
- Voluntary public survey participants are more likely to feel it is important to continue to promote Canadian artists through Canadian content rules and that promoting Canadian and French-language artists is essential to ensuring a strong Canadian and French-language culture in Canada. And, are also more likely to support all current Canadian content rules, to want to see French-language music requirements increase in the future, as well as requiring streaming music services to support the Canadian broadcast sector (but not in a way that interferes with consumers' ability to choose the content they want).