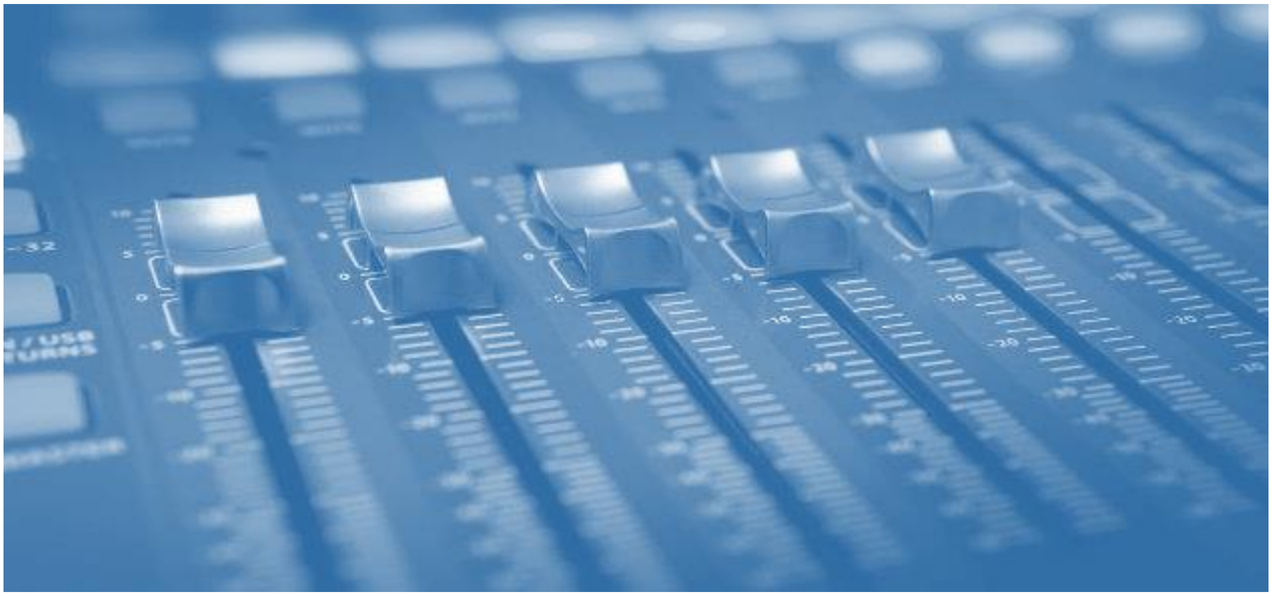
Canadian Radio-television and Telecommunications Commission
Conseil de la radiodiffusion et des télécommunications canadiennes



Attitudes and opinions towards commercial radio in Canada

Final Report

Prepared for the Canadian Radio-television and Telecommunications Commission
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Ce rapport est aussi disponible en français.

Canada

Attitudes and opinions towards commercial radio in Canada

Final Report

Prepared for the Canadian Radio-television and Telecommunications Commission
Supplier name: Ipsos Public Affairs
January 2021

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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TABLE OF CONTENTS

LIST OF FIGURES

Political Neutrality Statement

I hereby certify as Senior Officer of Ipsos that the deliverables fully comply with the Government of Canada political neutrality requirements outlined in the Communications Policy of the Government of Canada and Procedures for Planning and Contracting Public Opinion Research. Specifically, the deliverables do not include information on electoral voting intentions, political party preferences, standing with the electorate or ratings of the performance of a political party or its leaders.

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, homogeny 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).

INTRODUCTION

Ipsos was commissioned by the Canadian Radio-television and Telecommunications Commission (CRTC) to conduct public opinion research to understand the current habits, impressions and expectations of Canadians towards radio (and specifically the commercial radio sector).

BACKGROUND AND OBJECTIVES

At the core of the CRTC's mandate is to regulate and supervise broadcasting and telecommunications in the public interest by working to achieve the policy objectives set out in the *Broadcasting Act*, *Telecommunications Act* and Canada's Anti-Spam Legislation (CASL).

In the CRTC Department Plan 2019-2020, the Commission launched a process to modernize its regulatory framework for radio. The policy review will be guided by the objectives of the Broadcasting Policy for Canada and will seek to make adjustments to the Commercial Radio Policy to ensure that programming offered by the commercial radio sector continues to meet Canadian's needs and interests.

To contribute to the policy review process, the CRTC required Public Opinion Research (POR) to ensure the Commission has the relevant and latest information. Including POR as a component to the policy review will allow the CRTC to understand the current habits, impressions and expectations of Canadians towards radio (and specifically the commercial radio sector) and help to encourage participation among Canadians in the review process. It is essential to the CRTC and the integrity of the review that representative data among Canadians is collected and that a wide-variety of perspectives are included in any such research and on the public record.

The primary objectives of the POR research are to:

- Better understand Canadians' sources and habits with respect to consuming audio content, including radio AND specifically with respect to the commercial AM/FM radio sector (what type of content, how, when, where and on which devices). Based on the definition set out in the *Radio Regulations, 1986*: commercial radio means an AM station or FM station (operating on the AM or FM frequency band) other than a campus/community station, an Indigenous station or an ethnic station, and other than one that is owned and operated by the CBC/Radio-Canada or a not-for-profit corporation.
- Better understand Canadians' needs, interests and expectations from the broadcast programming specifically by the commercial radio sector, considering the audio content already available through other radio sectors, satellite radio, digital platforms, etc.

It was also anticipated that Canadians may raise issues as part of this review process and the POR should also help the CRTC to confirm or refute these potential issues and identify additional unexpected issues. Potential issues that may arise include programming diversity, programming quality, the loss of Canadian content (music content quotas) and discoverability, loss of French vocal music, local news/information, and loss of diversity of voices from concentration of ownership.

The POR research included a series of in-person and online focus groups held across the country, an online panel survey among a sample of Adult Canadians and an online survey offered online through the CRTC website available to any Canadian wishing and able to participate.

METHODOLOGY

The POR undertaken by the CRTC was conducted in two primary phases including both qualitative and quantitative research as outlined in the table below. Appended to the report is detailed methodological information, as well as a copy of the quantitative survey questionnaire and qualitative discussion guides.

Description	Details	Fieldwork Dates
QUALITATIVE		
Focus groups	13 focus groups were conducted online with participants from across Canada (9 in English, 4 in French) • 12 focus groups were conducted with those who listen on a regular basis to commercial radio, with at least half of each group who listen at least 5 times per week. • 1 focus group was conducted with those who do not listen to commercial radio and listen to other audio content and formats such as podcasts and music streaming.	Mar 19th - 31st, 2020.
QUANTITATIVE		
Online panel survey	n=1735 completed surveys among a sample of Adult Canadians 18 years of age or older. The sample was stratified by age, gender and region to the representative proportions of adult Canadians. Oversample of Quebec (n=500)	Nov 12th – 26th, 2020
Public survey for voluntary participation	Posted on CRTC website and promoted through CRTC social media channels. n=2969 completed surveys	

NOTES TO READERS

- The sample for the online panel survey was sourced through an online panel of Canadians who were pre-recruited to participate in survey research. Respondents were invited to participate based on their demographic characteristics. Quotas were applied and statistical weighting was utilized to ensure the final sample reflected the actual proportions of the Canadian population based on the 2016 Census (by age, gender and region) and forms the basis for the key findings in the research.
- The voluntary public survey provided an opportunity for participation among the broader public and is not considered to be representative of the Canadian population. Comparisons between results of the panel survey and voluntary public survey have been provided in a dedicated section of this report.
- The qualitative research was to provide in-depth exploration of factors that shape public attitudes and behaviours. When interpreting the findings, it should be kept in mind that at no point is the intention to produce results that are statistically representative of the population at large. Findings are meant to compliment the panel survey and provide greater depth of insight into specific experiences among these audiences.
- All results in the report are expressed as a percentage, unless otherwise noted.
- Throughout the report, percentages may not always add to 100 due to rounding.
- When reporting sub-group variations, only differences that are significant at the 95% confidence level, indicative of a pattern and pertaining to a sub-group sample size of more than n=30 are discussed.

DETAILED FINDINGS

1. RADIO HABITS and LISTENING

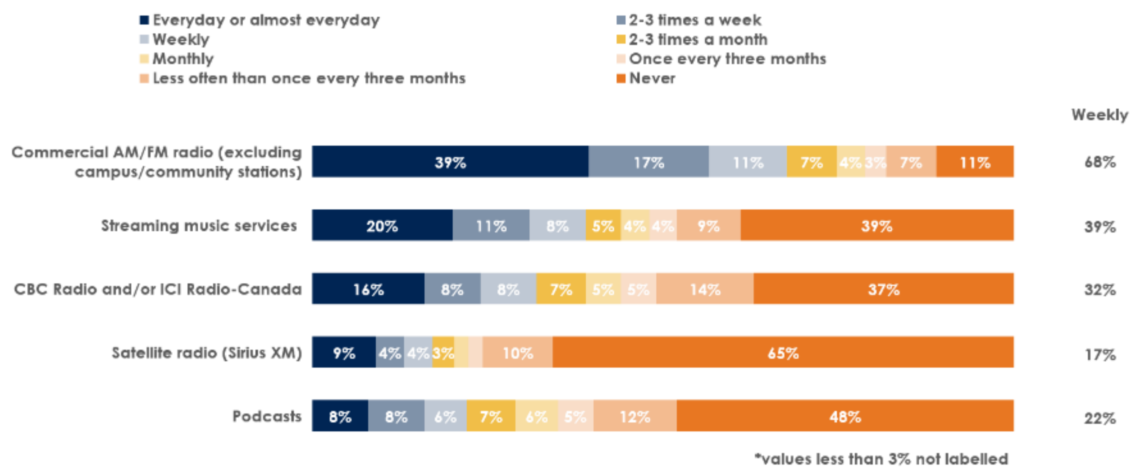
This section addresses attitudes, opinions, and behaviours as they relate to radio habits and listening, including typical usage habits and perceived importance of access to various broadcasting platforms and types of content on commercial radio.

Frequency of Listening to Programming on Broadcast Platforms

Nearly seven in ten (68%) Canadians report listening to commercial AM/FM radio at least weekly, the most of any broadcast platform, including four in ten (39%) who listen daily.

Four in ten (39%) report listening to steaming music services on a weekly basis, one third (32%) CBC Radio and/or ICI Radio-Canada and approximately two in ten report listening to either satellite radio (17%) or podcasts (22%). Most Canadians (68%) report never listening to satellite radio and nearly half (48%) never listen to podcasts.

Figure 1: Frequency of Listening to Programming on Broadcast Platforms



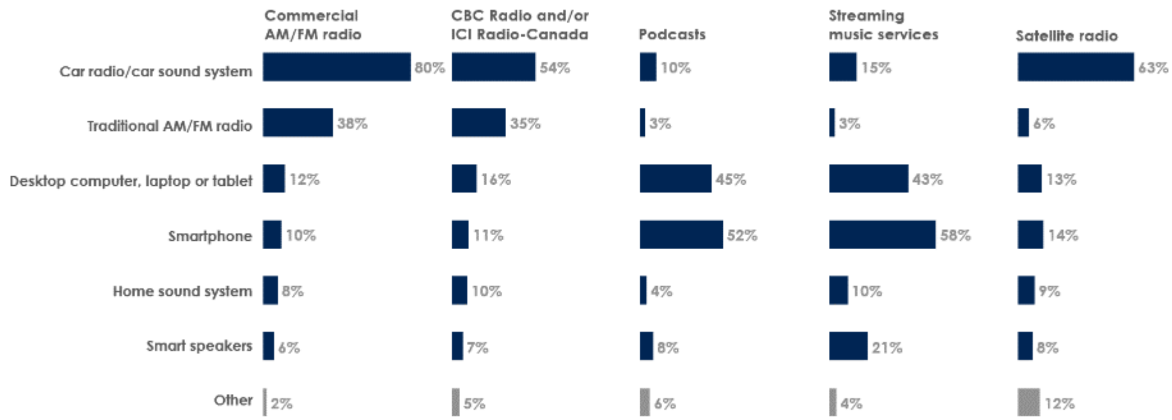
Q7. And, how frequently do you listen to programming on each of the following broadcasting platforms? Please select one response per item. Base: Total Respondents (n=1735)

Devices Typically Used to Listen to Broadcast

Car radio is by far the most commonly used device to listen to commercial AM/FM radio (80%) and to a lesser extent satellite radio (63%) or CBC Radio/ ICI Radio-Canada (54%). Nearly four in ten (38%) listen to commercial AM/FM radio or CBC Radio/ ICI Radio-Canada (35%) on a traditional radio.

Smartphones are most frequently used to listen to podcasts (52%) and streaming music services (58%), followed by a desktop computer, laptop or tablet (45% and 43% respectively).

Figure 2: Devices Typically Used to Listen to Broadcast

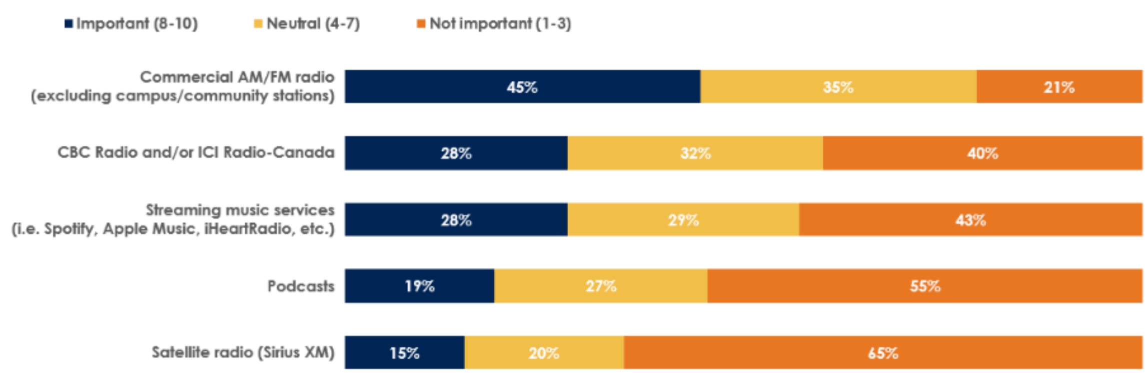


Q8. And on which device(s) do you typically listen to each of the following broadcasting platforms? Please select at least one response per item. Base: Varies

Perceived Importance of Various Broadcasting Platforms

Nearly half of Canadians (45%) think it is particularly important (8-10 on 10 pt scale) for them to have access to commercial AM/FM radio, by far the highest proportion relative to all other broadcast platforms. Three in ten feel it is as important to have access to the CBC Radio/ ICI Radio-Canada (28%) or streaming music services (28%), while fewer say it is important to have access to podcasts (19%) or satellite radio.

Figure 3: Perceived Importance of Various Broadcasting Platforms

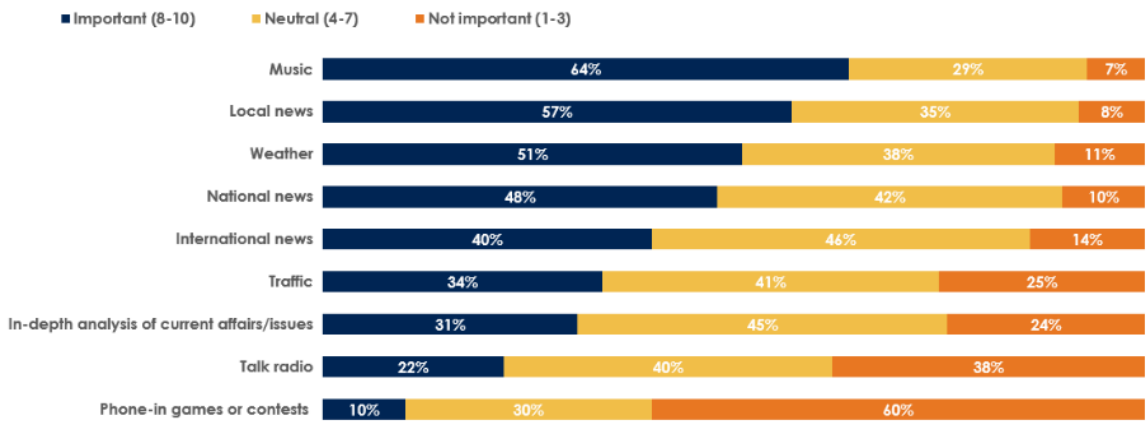


Q6. Generally speaking, how important it is for you to have access to each of the following broadcasting platforms? Using a scale from 1 to 10, where 1 is Not at all important and 10 is extremely important. Base: Total Respondents (n=1735)

Importance of Having Access to Content

At nearly six in ten, a strong majority of those who listen to commercial radio feel it is particularly important (8-10 on 10 pt scale) to have access to music (64%) and local news content (57%) on commercial AM/FM radio. Half of listeners feel it's important to have access to weather (51%) and national news (48%), while slightly fewer feel this way about international news (40%). Around one-third feel it's important to access to traffic (34%) or current affairs (31%) content, while fewer think having access to talk/radio (22%) or phone-in games or contests (10%) is important.

Figure 4: Importance of Having Access to Content



Q10. Thinking specifically about commercial AM/FM radio, how important is it to you to have access to the following types of content? Using a scale from 1 to 10, where 1 is Not at all important and 10 is Extremely important. Base: Listen To Commercial Radio At Least Sometimes (n= 1544)

Qualitative Findings

Occasions, Frequency, Locations and Devices

For commercial radio listeners, their habits varied in terms of when they listen, where they're listening and which devices they are using. Differences among participants in listening habits were driven by whether the person commutes to work, and whether they are permitted to listen to commercial radio in their workplace.

- Many listen **in their vehicles** en route to and from work, while running errands, or driving their children to school or activities. Most use the in-vehicle radio, although some play the radio from their phone.
- Many listen **at work**; most listen openly to the radio without use of headphones and listen to a station which is agreeable to their colleagues. There tends to be more permission by employers to listen to the radio vs. other formats, and commercial radio is viewed by some as playing more workplace-appropriate music. Participants use a variety of devices – older ones such as a 'boom box' (a portable sound system), from their computer internet browser, or from their workplace's sound system, in workplaces where music is played for everyone.
- Some listen **in their homes**, typically while engaged in other activities such as chores or spending time with their families. Often, they play commercial radio continuously or for long periods. They use a combination of devices –speakers, sound systems, smartphones or tablets, or traditional radios.
- A few listen **on public transit or on foot** while going to and from work or en route to activities – these participants listen on their smartphones via a radio application.

Because so many participants listen on the way to and from work, and/or at work, many tend to listen to commercial radio more during weekdays than on weekends, especially for those who don't listen to the radio at home.

Many still listen whenever they are driving on the weekend, and some listen at home on the weekend– if they have one particular station that they regularly listen to, or they always keep the radio on as background and atmosphere. Mention was made by a few that programs and shows are different on the weekends and are considered less interesting than the ones they listen to during the week.

Some prefer to change formats or content when not in their vehicle, and choose to listen to music streaming, podcasts, or their own downloaded music instead. There are more options in terms of devices and audio content available to them on the weekend, and more time and presence of mind to listen more purposefully and actively. Audio content consumption generally decreases during the weekend.

Content

There are a few main functions or ways that participants use and engage with commercial radio, and variations of the content they are seeking.

- **Purpose-driven** listening, such as traffic, news or summary of key headlines, favourite talk radio shows (sports, opinion-based), phone-in quizzes, games or contests for their entertainment value.
- **Background** listening, while at home, work, or on the road. The music and talking provides a sense of comfort, companionship and community; listening in this way can be for extended periods.
- **Music listening** is another key function, as most participants listen to at least some music on commercial radio. Some describe themselves as music enthusiasts or fans. While some like all different genres and wide-ranging taste in music, others have a particular genre that they like best and seek this music out actively on commercial radio. The type of music played can also depend on mood or emotions in the moment.

Some make a point of noting that commercial radio provides a good variety of music, and does a good job of providing the desired mix between more contemporary and current artists and songs, and older classics and favourites. They know which stations are playing the genre or type of music they like, or switch between stations to get the variety they seek.

Others enjoy both – they listen to commercial radio in certain contexts but then also create their own playlists for other situations. Many enjoy the element of surprise and discovery facilitated by not curating their own playlists, or do not wish to put time and energy into creating their own playlists.

By contrast, those in the non-radio listening group disliked the lack of choice and control, and prefer to curate their own playlists based on personal tastes and preferences, and prefer choosing podcasts to listen to over the talk on commercial radio.

Many like that the music is broken up by news and talk, and feel that this is a welcome break from music. They enjoy the banter between hosts, and the humour and levity created by them.

Listening in Bilingual Markets (Ottawa/Gatineau, Timmins, Montréal)

Levels of bilingualism and facility in the other official language were higher in bilingual markets among French-speaking participants, and lower among English-speaking participants. As such, many English-speaking participants do not listen to music or other content in the other official language simply because they do not speak or understand it.

Among French-speaking participants, there is a greater level of English facility, and so preferences are more mixed. Some prefer to listen to French stations simply for reasons of personal preference or language comprehension.

Some tend to listen to English stations over French ones. The reasons for this vary, including more options in English, belonging to a mixed language household, personal musical preference, or wanting to learn or improve their English language skills. However, when listening to the news, most prefer to listen in French.

There is a strong affinity among Quebec French participants for French language hosts – listeners look forward to hearing them, appreciate the interactive nature of commercial radio and the immediate nature of commercial radio.

Other Audio Content

Many listen to a variety of audio content such as podcasts, music streaming, and audio books.

Podcasts are seen as completely different category than commercial radio to those who listen to them. Consumption is always purposeful, and it is a more active listening experience requiring focused attention, intellectual engagement, and concentration. Those who listen to podcasts are seeking to understand a topic in more depth.

By contrast, commercial radio is perceived by many – particularly those who listen to it as "background" and a more passive listening experience than podcasts. Listening to commercial radio can be "active" to some degree – such as when singing along to music, participating in contests or games, or switching stations.

Music streaming provides freedom to personalize to individual tastes, specific moods, and access to music beyond current top hits which many state are played in continuous rotation on commercial radio. And many who listen to streaming like the commercial-free format.

To some degree, use of other audio formats and content was determined by demographics, as some older participants were unaware of these formats, reluctant to try them, or believed they lacked the technical facility to try them. Or they are reluctant to pay for music.

Changes in Listening Habits

While some listen to audio content in a fairly routine or set way, others are format and device agnostic and listen depending on their mood or a situation in any given moment.

Many have changed their listening habits over the years because of an increase in choice – they are generally welcoming of and open to new formats. Others have had lifestyle changes which have shifted their listening habits to listen to more or less commercial radio accordingly.

Some have not changed their listening habits – this is due to a lack of technical facility in newer formats or because they are currently satisfied with their listening options, and don't feel the need or desire to change.

Podcasts and streaming typically require a greater level of effort to access content where commercial radio is easier for some to simply turn on and listen to. Or, there might already be an established routine in place with commercial radio.

Many non-radio listeners have stopped listening to commercial radio over time, due to the increase available options, although mention was made about not liking the commercial radio format at any point. For music, they have more choice, control and an increase in the accessibility of alternate formats – particularly with the advent and increased uptake of smartphones. There is also a perception of types of content not available on commercial radio which have now become available, such as podcasts. For news, they turn to other available sources and there was some skepticism expressed about credibility and questions about potential bias of commercial radio news.

Most non-radio listeners felt that it was unlikely they would listen to commercial radio again – because they dislike the current format and feel it is too homogenous across all stations, don't want to listen to commercials, and feel that the music played is too repetitive. There is a willingness among these participants to pay streaming service fees to mitigate these concerns and issues.

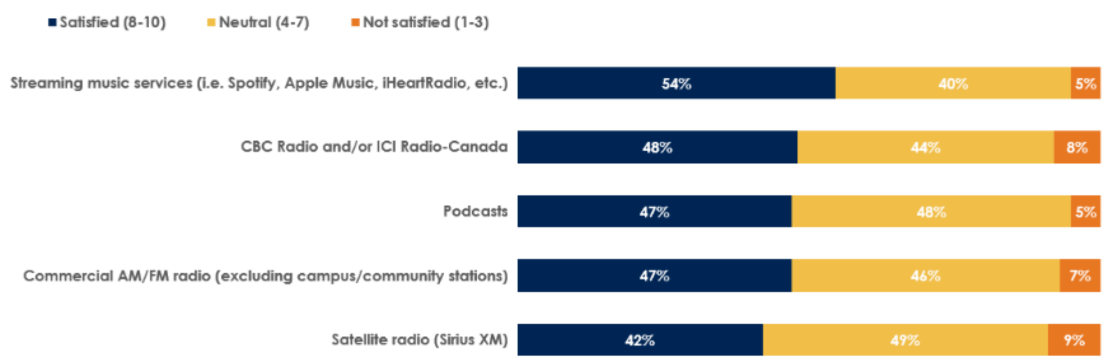
2. SATISFACTION WITH THE LISTENING EXPERIENCE and COMMERCIAL RADIO

This section addresses attitudes and opinions as they relate to satisfaction with the listening experience across all broadcast platforms as well as with specific aspects of commercial radio, including things Canadians think most about and areas for improvement.

Satisfaction with the Listening Experience

Among those who report listening to each platform, satisfaction is highest for streaming music services (54%, 8-10 on 10 pt scale), followed by the CBC Radio/ ICI Radio-Canada (48%), podcasts (47%), and commercial AM/FM radio (47%). Closer to four in ten (42%) are satisfied with the listening experience on satellite radio. Few are dissatisfied with the listening experience across all broadcasting platforms.

Figure 5: Satisfaction with the Listening Experience

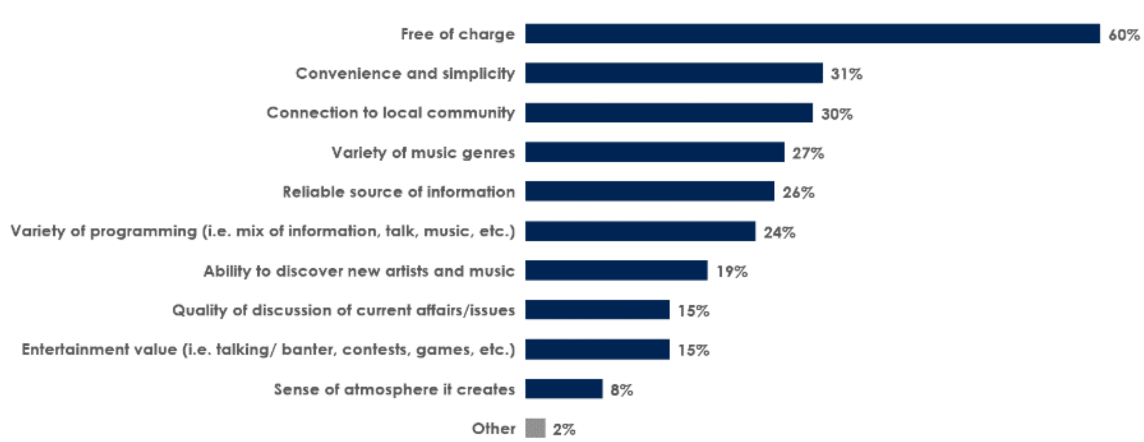


Q9. Overall, how satisfied are you with your listening experience with each of the following broadcasting platforms? Using a scale from 1 to 10, where 1 is 'very dissatisfied' and 10 is 'very satisfied'. Please select on response per item. Base: Varies

What Canadians Like Most About Commercial Radio

By far the most common thing commercial radio listeners like about it is that it is free of charge (60%). Three in ten cite the convenience and simplicity (30%) or the connection it gives them to their local community (30%), followed by the variety of music genres (27%) and a reliable source of information (26%).

Figure 6: What Canadians Like the Most About Commercial Radio

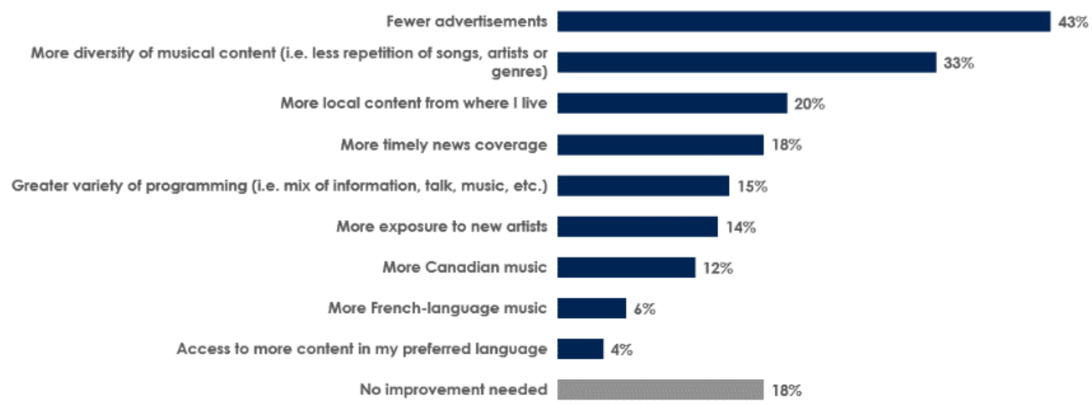


Q11. What are the things that you like most about commercial radio? Please select up to three of the following. Base: Listen to Commercial Radio At Least Sometimes (n= 1544)

Improving Commercial Radio

At four in ten, the most common area cited by commercial radio listeners for improvement is having fewer commercials (43%). One-third (33%) would like to see more diverse musical content, followed by two in ten who want more local content (20%) or more timely news coverage (18%).

Figure 7: Improving Commercial Radio

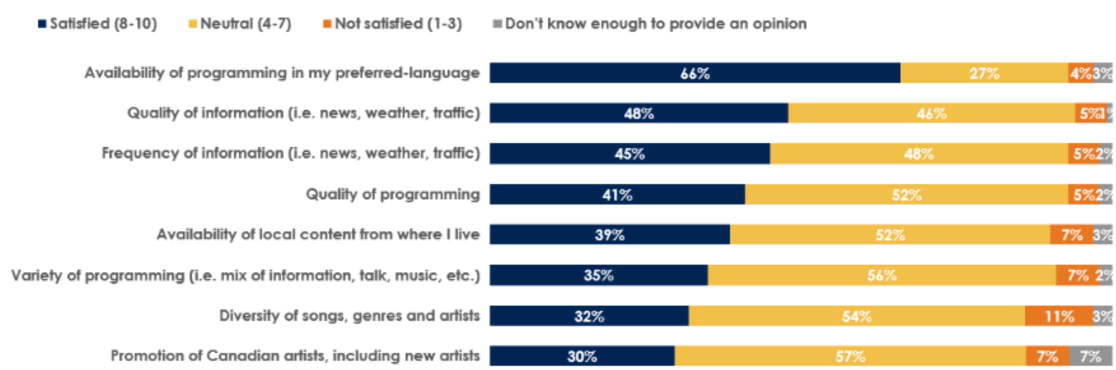


Q12. What, if anything, do you feel needs to be improved most about commercial radio? Please select up to three of the following. Base: Listen To Commercial Radio At Least Sometimes (n= 1544)

Commercial Radio Satisfaction

At two-thirds (66%), commercial radio listeners are most satisfied (score of 8-10 out of 10) with the availability of programming in their preferred-language. Nearly half are satisfied with the quality of information (48%), the frequency of information (45%), while slightly fewer are satisfied with the quality of programming (41%), and the availability of local content (39%). Satisfaction is lowest for the variety of programming (35%), diversity of song, genres and artists (32%) and promotion of Canadian artists (30%).

Figure 8: Commercial Radio Satisfaction



Q13. How satisfied are you with each of the following aspects of commercial radio? Using a scale from 1 to 10, where 1 is 'very dissatisfied' and 10 is 'very satisfied'. Please select on response per item. Base: Listen To Commercial Radio At Least Sometimes (n= 1544)

Qualitative Findings

Meeting Needs and Interests

a. For news and talk radio

Many are satisfied with the format, length and content of news that they hear on commercial radio. They described it as a high-level overview of the biggest headlines and state that this is either the right amount of information they need, and/or if they would like to find out more about a given topic or news item, they can pursue more in-depth information through other means such as internet searches.

Some are simply not interested in listening to the news on the radio and prefer other formats. Mention was made that it can be more timely or convenient to listen to the news on the radio, while mention was also made that participants sometimes miss the news on the radio since it tends to be played at a certain time.

Mentions were made of concerns with the type and quality of news available on commercial radio – including an emphasis on “celebrity” or pop culture news instead of more serious topics, or that there is a lack of in-depth coverage of the news.

While some feel that the news on commercial radio provides sufficient local content and information, others feel that they don’t hear enough on some stations and have to switch to another, or in general switch to a different medium. Further, those who live in smaller markets outside major cities only have access to stations from major markets and not local to their town/area—as such, they would like more content or options specifically for them.

Some listen to talk radio and among those who did, opinions varied on availability and content. Those who actively listen to talk radio stated that they have available choices in their market and have a show or shows that they find entertaining and enjoyable. Participants from Quebec in particular believe that they have a lot of talk radio content and have favourable impressions of the format and choices.

Others have tried listening to talk radio but found the show format to be biased and disliked that opinions expressed were purely personal views, as opposed to being more neutral information. Mention was made by a few that there is a lack of talk radio options currently available, or that programming has been cancelled over time. For those who noted cancellation, they lamented that talk radio was no longer available as a listening option.

Some suggest that commercial radio is more ‘in the moment’ and better suited to providing instantaneous updates, and local updates and content, than public radio, which they consider to be more regional and national in terms of scope and content.

b. To discover new artists and music

Some felt that commercial radio is a good option to discover new artists and music – in fact, they may listen specifically to the radio for this reason since they wouldn’t have any other means to do so within their own curated music libraries or collections. The available variety of new music on commercial radio is perceived by some to have improved for the better over time.

Others felt that there is little variety of artists on commercial radio and that there are certain artists and songs which get played repeatedly both throughout the day and over an extended period of time. Further, mention was made that even among the popular artists being played, only their most popular songs are played, even though there are often many available songs in an artist’s catalogue.

Some conflated ‘new’ with ‘local’ and for these participants, most agreed that new local artists are rarely played on commercial radio; however this would be of great interest – both as a listener, and to provide opportunities, exposure and financial support to new local artists. They feel that these artists do exist and should be played more on commercial radio – the issue is not that there is a lack of local artists.

A few mentioned that campus or community radio stations are a better source of new music – both new artists, and different genres – although these participants were unsure whether or not this could somehow be adapted to commercial radio.

However, mention was made that the primary function of commercial radio is not to play new artists or expose listeners to them – and that this type of content would be better served in other formats.

c. To discover music from the other official language

For most English-speaking participants, even those in bilingual markets, they simply do not speak French and as such some are not interested in listening to French music on commercial radio stations.

Others would be interested in listening to French music or music in another language, and point to the example of other international artists where they don't understand the language, but respond positively to the music. As such, hearing French music on English stations would be of interest to these participants.

d. For diversity of songs, genres and artists

Some believed that there is ample or sufficient diversity of songs, genres and artists available on commercial radio. There was a perception that the variety of music available has changed for the better over the years, and there is increasingly more genres available to listeners.

Others believed there is a lack of diversity, and point especially to popular music, which these participants felt gets played repeatedly and in the opinion of some participants, excessively –with certain stations who are worse in this regard than others.

e. Quality of Programming

Many were happy or satisfied with the quality of programming available to them on commercial radio, and that there is a variety of quality choices available to them across the medium. They like the mix of talk by the host with music, and if there is more than one host, the interaction and banter among them. They like the predictability of the format in that they know when to listen in for news, traffic and weather. And most importantly to many, they enjoy the music played on their preferred station(s), as well as the ability to switch stations if needed to listen to other genres or a particular song. Mention was also made of items such as contests and games which lend a sense of fun and levity.

There was dissatisfaction or concern expressed by some about the format – in addition to the repetitiveness of popular songs, mention was made that sometimes there is excessive talk and not enough music, particularly in the morning; games or contests that are in poor taste; and too much repetitive format across all stations. That said, these concerns did not deter them from being regular listeners of commercial radio.

Those who live in smaller markets felt that they have less choice in the number and variety of available commercial radio stations, and this was characterized as a drawback – these participants would like more choice. This was true of both music options, and talk radio options.

Those who live in larger markets characterize the available variety and choice of stations favourably – they feel they have a good amount of choice in getting the music and programming they would like.

Local Content

As noted above, commercial radio mostly acts to provide the main headlines as it relates to local news and the traffic updates. In some more rural communities, it was seen as an important medium to stay informed of what is happening in the community due to a lack of alternatives. Others, however, tended to supplement commercial radio news coverage with other sources such as Twitter, news apps and websites and TV news which provide more in-depth coverage. For online sources, these were deemed as more 'in the moment' and do not require listening at a certain time.

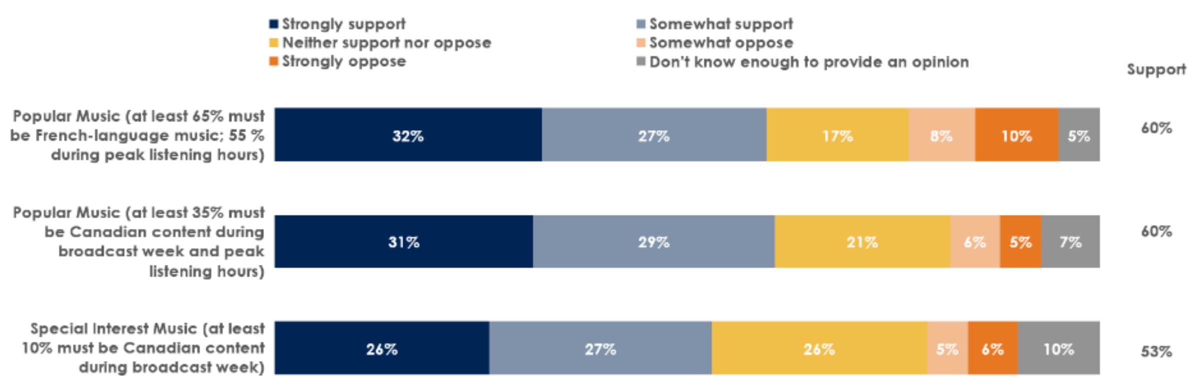
3. CONTENT REQUIREMENTS and REGULATIONS

This section addresses attitudes and opinions towards commercial radio content requirements and regulations in Canada including support for Canadian content and French-language music rules. This section also focuses on content rules specific to streaming services in Canada and the extent to which Canadians are aware and concerned about the concentration of ownership of commercial radio stations in Canada.

Support for Canadian Content and French Language Music Rules

A majority of Canadians support the Canadian content and French-language music rules currently in place for commercial radio and relatively few are opposed. Support is highest for Canadian content requirements for popular music (60% strongly/ somewhat support) and French-language music requirements among Francophones (60%), while closer to half of Canadians support special interest music rules (53%).

Figure 9: Support for Canadian Content and French Language Music Rules

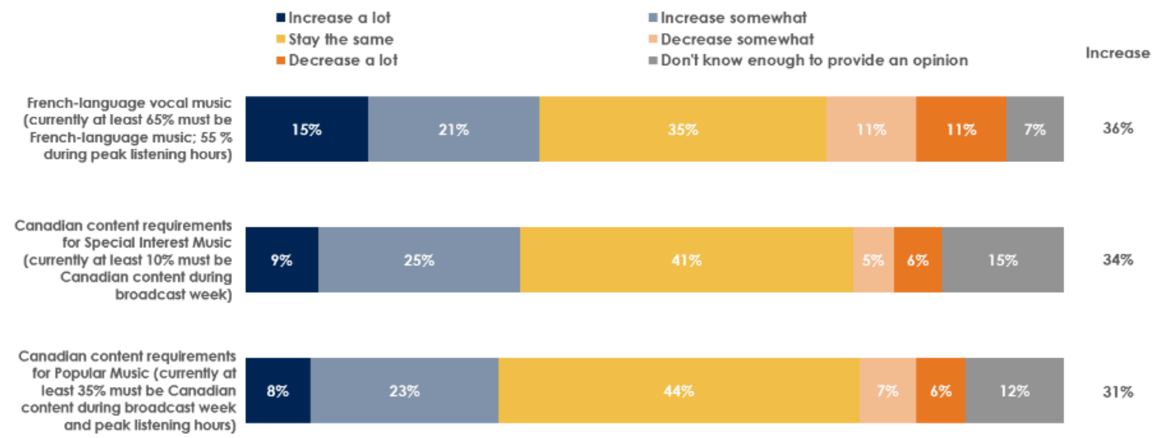


Q14. How much do you support or oppose the Canadian content and French-language music rules for commercial radio that are currently in place? Base: Varies

Canadian and French Content Percentage Requirements

When asked whether the percentage of Canadian content or French-language music content should increase, decrease or stay the same in the future, a plurality feel it should stay the same for each of type of content- popular music (44% increase a lot/ increase somewhat), special interest music (41%) or French-language vocal music (35%). Around one third (36%) of Francophones feel the percentage of French-language vocal music should increase, while a similar proportion of Canadians feel the percentage of special interest music (34%) or popular music (31%) should increase.

Figure 10: Canadian and French Content Percentage Requirements

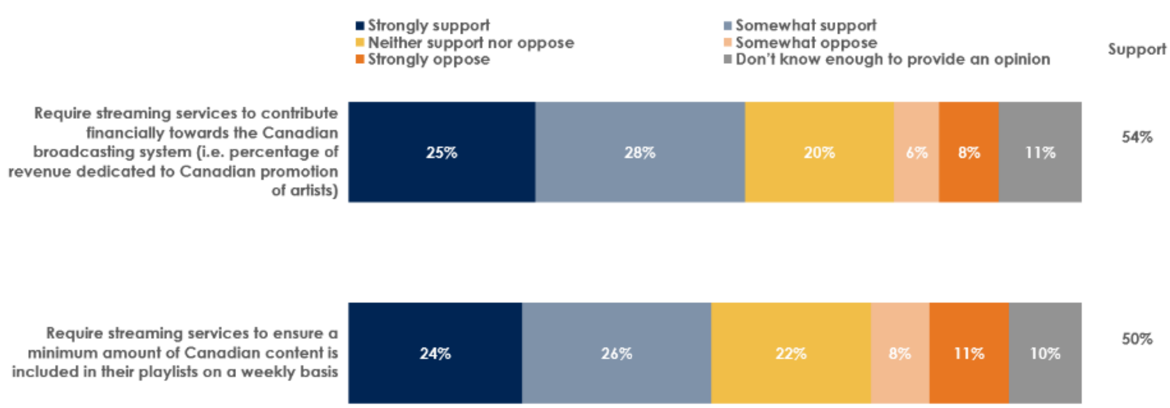


Q15. If these regulations were to be changed in the future, do you feel the percentage of required content that must be played should increase, decrease or stay the same? Base: Varies

Content Rules for Streaming Services

Just over half of Canadians (54% strongly/ somewhat support) support requiring streaming services to contribute financially towards the Canadian broadcasting system, followed closely by 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 content rules for streaming services in Canada.

Figure 11: Content Rules for Streaming Services

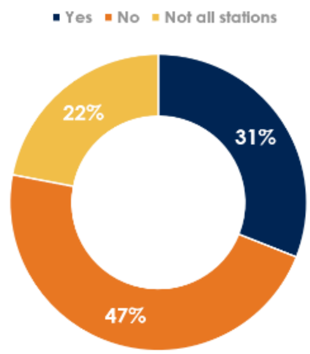


Q16. Currently there are no Canadian content rules specific to streaming services in Canada (i.e. Spotify, Apple Music, iHeartRadio, etc.). How much would you support or oppose the CRTC creating the following types of regulations? Base: Total Respondents (n=1735)

Knowledge of Commercial Radio Companies

Just over half (53%) of commercial radio station listeners claim to know the names of at least some the company(ies) that operate the commercial radio station(s) that they listen to- three in ten (31%) are aware for all of the station(s) they listen to, while two in ten (22%) know some, but not for all stations. Conversely, nearly half (47%) do not know the name of the company that operates any of the radio station(s) they listen to.

Figure 12: Knowledge of Commercial Radio Companies

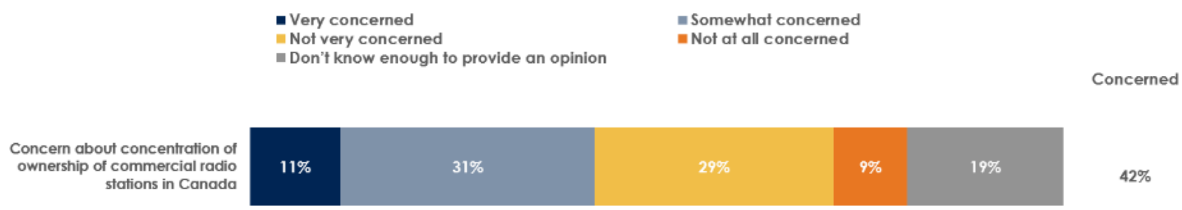


Q17. Do you know which company operates the commercial radio station(s) that you listen to?
Base: Listen To Commercial Radio At Least Sometimes (n= 1544)

Concerns Over Concentration of Ownership

Four in ten (42% very/ somewhat concerned) Canadians express concern about the concentration of ownership of commercial radio stations in Canada of which most are somewhat concerned (31%). Two in ten (19%) feel like they don't know enough to offer an opinion.

Figure 13: Concerns Over Concentration of Ownership



Q18. Commercial radio stations are generally privately owned. The CRTC regulates, among other things, the ownership of various radio stations and the concentration of ownership authorized for a single company. In 2018, the five largest radio ownership groups in Canada garnered over 65% of total commercial radio revenues. How concerned are you about concentration of ownership of commercial radio stations in Canada (i.e. fewer companies owning more radio stations). Base: Total Respondents (n=1735)

Qualitative Findings

Canadian Content Requirements for Popular Music and Special Interest Music

Awareness of Canadian Content Requirements was mixed to low. Where awareness existed, some participants had the accurate impression that it pertained to a certain amount of content played must be Canadian though unsure of the precise percentage. Misperceptions by others centred around the belief that the rules related to appropriate language or content.

When presented with details on the Canadian Content Requirements, reactions skewed mostly positive to neutral. This was underpinned by a combination of:

- An underlying sense of national pride in supporting Canadian artists – that said, when listening to music, they admitted to not paying much attention to whether an artist is Canadian or not.
- Belief that exposure is important in helping Canadian artists along in their careers and therefore financially.
- Canadian content can help bolster Canada's weaker cultural identity especially vis-à-vis the US.

The specific percentages allocated for Canadian artists – 35% for popular music and 10% for special interest music – stirred some debate though there was no clear consistent pattern in driving impressions. For some, the numbers set were fine and the minimum they would expect. Others felt that these percentages could be higher, especially since some of these participants felt that Canadian artists were not played often enough and 10% seemed low for special interest music. Where there was support for a higher percentage, 50% was often brought up as a potential new threshold.

More interestingly, there was a view that the percentages per se were less of an issue, rather the issue being that a handful of very famous Canadian artists and bands tend to dominate the airwaves. This in turn led to calls for more support for the rest of the Canadian artist industry.

It is worth noting that a minority admitted to caring little about Canadian Content Requirements since their listening preferences are not driven by where the artists are from.

Canadian Content Requirements for French-language Commercial Radio Stations

While there were lower levels of awareness of the French-language Popular Music Requirement, support for the Requirement was near unanimous. This was underpinned by the same sentiments expressed in relation to the Canadian Content Requirement, albeit in the context of supporting Francophone artists and culture vs. English-speaking artists.

Some participants wished to see an increase to the minimum of 65% of popular music selections dedicated to French-language musical selections; indeed, it was pointed out that the reason for turning to French-language stations in the first place is to listen to French music. Few participants also called for more exposure of Francophone artists on English radio stations.

Commercial Radio Ownership

Ownership of commercial radio stations factored little in station choices and listening habits; choices were largely driven by mood and taste as discussed in the preceding sections. For the most part, it was evident that participants had given little prior thought and had low levels of awareness on the ownership of the stations they listened to.

Despite low interest in ownership, there was an underlying assumption that stations are owned by large media groups such as Bell, Rogers and Virgin. Some went further to assume that stations may not even be in Canadian ownership with parallels drawn to iconic Canadian Tim Hortons that is owned by a multinational conglomerate.

Greater deliberation on the issue of ownership led to the identification of potential drawbacks for radio listeners:

- 'Cookie cutter' stations (in terms of format and type of content played) when one media group owns multiple stations – this was emphasized in the Vancouver group and partly underpinned by market-based ideology.
- The loss of diversity of viewpoints, promotion of 'certain ideologies' and the greater editorial control in shaping the public discourse if ownership is concentrated in the hands of a few – the polarized nature of the media landscape in the US was brought up in some groups as a case in point.
- A decrease in the amount of local content played by stations that are not locally owned – In Timmins this was raised in the context of Canadian content and foreign owned stations. Whereas in Gatineau, participants spoke of the risk of losing what matters to Quebec residents in the face of Ontario-owned stations.

That said, a small number remained indifferent to ownership structures so long as they could have access to a variety of stations to suit their musical preferences.

Streaming Services

The proposal on regulation of streaming music services tended to elicit a skeptical knee-jerk reaction, especially among those who use these services. Regulation was seen at odds with the main draw of streaming: the freedom to personalize music playlists. This was compounded by the fact that streaming service subscribers pay for this freedom and an attitude of 'if it's not broke, don't fix it' noting that there is plenty of Canadian content to select from. The practicalities of operationalizing and enforcing this were questioned, especially in the face of large multinationals like Apple.

Greater financial contribution tended to be less controversial and elicited a more enthusiastic support in some quarters – French-speakers in Gatineau specifically. This was largely underpinned by the perceived importance of supporting homegrown artists and belief that streaming services do not remunerate artists or contribute to the general taxation base enough. That said, there was a minority view, found in Eastern Canada especially, where there was lower support of this in fear that the costs would be passed on to users, or limit access to these services as companies may decide to pull out of Canada because of CRTC regulation.

While some remained decidedly against any regulation or greater financial contribution beyond existing contracts with Canadian artists, others were willing to accept the application of a Canadian Content Rule in a non-intrusive manner e.g., streaming services suggesting Canadian artists or songs based on subscribers' current listening habits or working with platforms to ensure representation of Canadian artists. The cardinal principle therefore for any future regulation is to not impinge on subscribers' ability to easily access their preferred content.

4. GENERAL ATTITUDES and OPINIONS

This section addresses Canadians general attitudes and opinions on matters related to commercial radio broadcasting platforms including regulation, ownership, and content requirements.

General Attitudes and Opinions

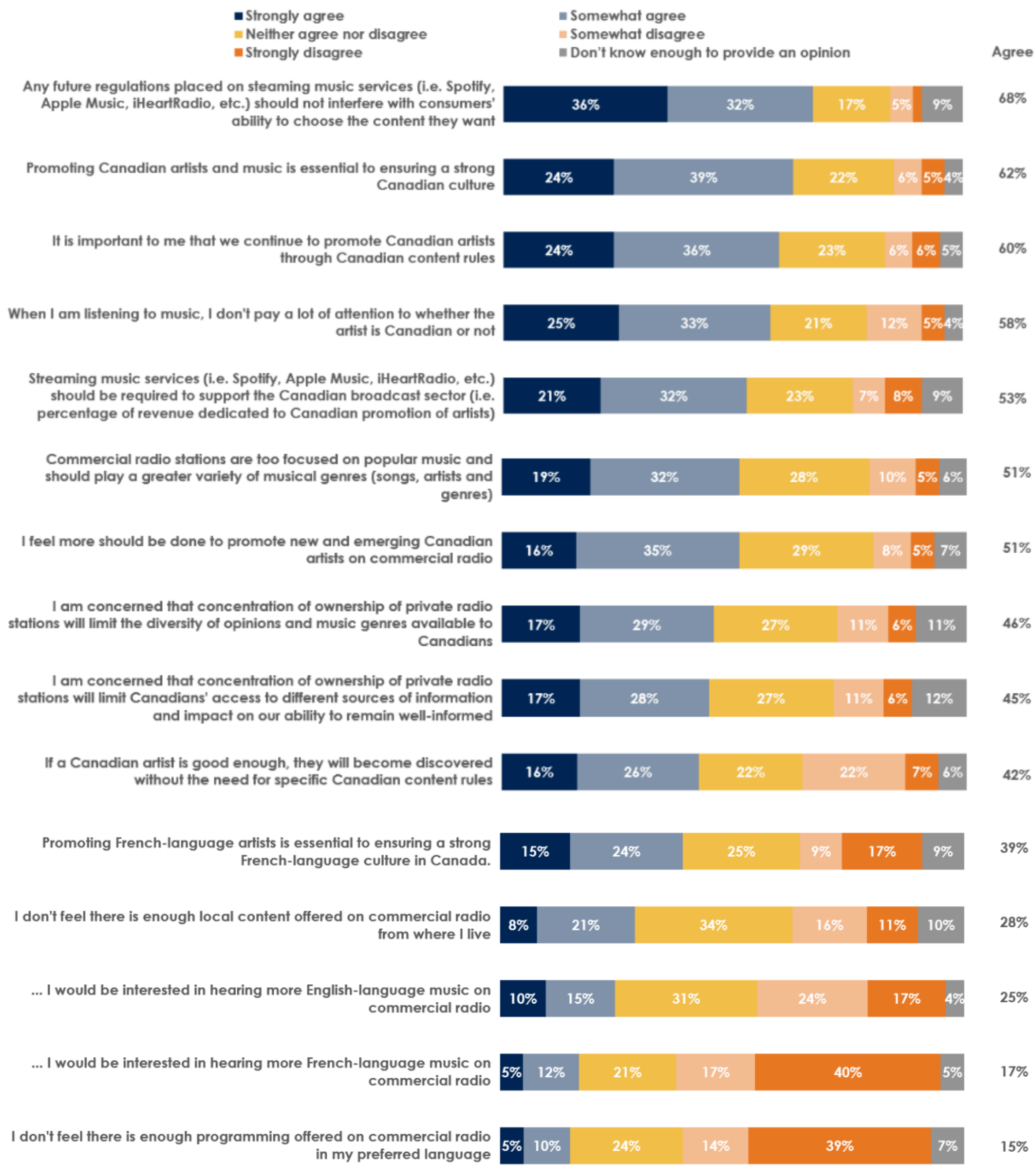
Agreement is strongest (68% strongly/somewhat agree) that any future regulations placed on steaming music services should not interfere with consumers' ability to choose the content they want. A majority of Canadians also agree that promoting Canadian artists and music is essential to ensuring a strong Canadian culture (62%) and that it is important that we continue to promote Canadian artists through Canadian content rules (60%). Most don't pay a lot of attention to whether the artist is Canadian or not when listening to music (58%).

Just over half of Canadians think streaming music services should be required to support the Canadian broadcast sector (53%), that commercial radio is too focused on popular music (51%) and that more should be done to promote new and emerging Canadian artists on commercial radio (51%).

Nearly half express concern that concentration of ownership of private radio stations will limit the diversity of opinions and music genres available to Canadians (46%) or that it will limit Canadians' access to different sources of information and impact on our ability to remain well informed (45%). Four in ten agree that if a Canadian artist is good enough, they will become discovered without the need for specific Canadian content rules (42%) or that promoting French-language artists is essential to ensuring a strong French-language culture in Canada (39%, however 72% of Francophones agree vs. 33% of Anglophones).

Nearly three in ten (28%) agree there is not enough local content offered on commercial radio where they live, while only fifteen percent (15%) do not think there is enough programming offered in their preferred language (However, twice as many Francophones agree 32%). Few Anglophones (17%) would be interested in seeing more French-language music on commercial radio, while similarly, only about one in four (25%) Francophones would be interested in seeing more English language music on commercial radio.

Figure 14: General Attitudes and Opinions

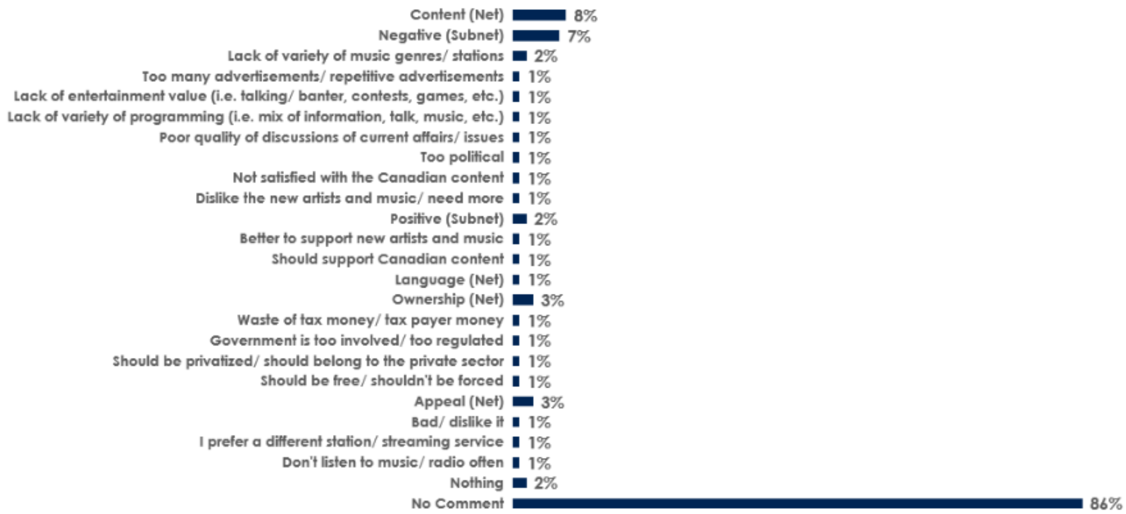


Q19. Please indicate how much you agree or disagree with the following statements. Please provide one response per item.
Base: Total Respondents (n=1735)

Open-ended Feedback

The vast majority (86%) of Canadians do not offer any additional feedback, when asked to comment on their experiences with commercial radio in Canada. The highest proportion of those who do reference content (8%), specifically negative mentions about a lack of variety.

Figure 15: Open-ended Feedback



Q20. Are there any other comments about your experience with commercial radio in Canada or any other topics we have discussed in this survey that you would like to share? Base: Total Respondents (n=1735)

5. DIFFERENCES BY DEMOGRAPICS

This section addresses differences by demographic information. The demographic factors which were analyzed include age, gender, region of residence, Indigenous status and whether the respondent was born in Canada.

Region of residence

Behaviours, attitudes, and opinions towards commercial radio vary based on where in the country the individual resides and the most common differences are observed between those who reside in Quebec and those who reside in the rest of Canada (ROC).

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.

The primary differences by region of residence are as follows:

- Those who reside in Quebec are twice as likely to agree that promoting French-language artists on commercial radio is essential to ensuring a strong French-language culture in Canada (62% vs. 32% ROC) and more likely to agree that it is important continue promoting Canadian content on commercial radio through Canadian content rules (67% vs. 58% ROC).

- Those who reside in Quebec are less likely to agree that when listening to music they don't pay attention to whether the artist is Canadian or not (45% vs. 62% ROC) and are less likely to express satisfaction with the availability of commercial radio programming in their preferred language (54% vs. 70% ROC) or to agree that they don't feel there is enough programming offered on commercial radio in their preferred language (30% vs. 10% in ROC).
- If Canadian content requirements for popular music were to be changed in the future, those who reside in Quebec are more likely to feel as though the percentage of required Canadian content that must be played on commercial radio should increase (38% vs 28% ROC).
- Those who reside in Quebec are more likely to support requiring streaming services to ensure a minimum amount of Canadian content is included in their playlists on a weekly basis (59% vs. 47% in ROC).
- Among commercial AM/FM radio listeners, those who reside in Quebec are more likely to indicate that they typically listen to broadcasts on traditional AM/FM radio (48% vs. 35% ROC). Of those who are streaming music service listeners, Prairie residents are less likely to typically consume content via their laptop, tablet or desktop computer (26% vs. 44% ROC).
- Those who live outside of Quebec are more than twice as likely (35% vs. 14%) to cite a sense of connection to the local community, as what they like most about commercial radio. Those who reside in Quebec (14%) and to a lesser extent, Atlantic Canadians (9%) are more likely to mention the sense of atmosphere (6% ROC excl. Atlantic Canada).
- Those who reside in Quebec (39%) and to a lesser extent, British Columbians (32%) are more likely to indicate that it is important (8-10 on 10 pt scale) for them to have access to CBC Radio/ ICI Radio-Canada. Those who reside in Quebec (45%) and Atlantic Canadians (39%) are far more likely to report listening to CBC Radio/ ICI Radio-Canada on at least a weekly basis (27% ROC excl. Atlantic Canada).

Age cohort

Satisfaction with commercial radio increases with age and those over 40 are more likely to report being highly satisfied (8-10 on 10 pt scale) with the commercial radio listening experience and are twice as likely compared to those under 40 to feel no improvements/changes to commercial radio are necessary.

The youngest generation, Gen Z (18-23 year olds), 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 most. 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 are less likely to feel as though there is not enough programming offered on commercial radio in their preferred language. Support for the CRTC requiring streaming services to contribute financially towards the Canadian broadcasting system and ensuring a minimum amount of Canadian content is included is highest among Boomers.

The primary differences by age of respondents are as follows:

- Gen Z is less likely to listen to commercial AM/FM radio on a weekly basis (47% vs. 70% 24+) and the most likely to report listening to streaming music services at least weekly (71% vs. 37% 24+). Boomers are less likely than those 55 or younger to listen to podcasts on at least a weekly basis (8% vs. 29%) and are more likely to report listening to CBC Radio/ ICI Radio-Canada (38% vs. 29%).

- Satisfaction with commercial AM/FM radio is higher among those aged 40+ (54%) compared to those under 40 (35%). Similarly, majorities (52%) aged 40+ express satisfaction with CBC Radio/ ICI Radio-Canada compared to four in ten (39%) under the age of 40.
- Canadians over 40 are more likely to believe that no improvement is needed to commercial radio (22% vs. 10% under 40) and less likely to mention more diversity in musical content (29% vs. 40%) or access to content in their preferred language (2% vs. 6%) as improvements that could be made. Those over 40 are also more likely to think it is important to have access to talk radio (24% vs. 17% under 40).
- Gen Z is less likely to think it is important to have access to commercial AM/FM radio (24% vs. 46% 24+) and to express satisfaction with most aspects of the listening experience. They are also less likely to indicate that it is important (8-10 on 10 pt scale) to have access to local news (21% vs. 59% 24+), national news (20% vs. 50%), international news (18% vs. 41%), weather (30% vs. 52%) or traffic (20% vs. 35%) on commercial radio. Gen Z are much more likely to feel it is important (8-10 on 10 pt scale) to have access to streaming music services (51%) compared to those over 24 (26%).
- Boomers are most likely to cite the connection to their local community (36% vs. 26% 55 and under) as well as the reliability of information provided (34% vs. 22%), as the things they like most about commercial radio. Gen Z and Millennials are most likely to mention their ability to discover new music (27% vs. 15% 40+) or the sense of atmosphere provided by commercial AM/FM radio (12% vs. 6%).
- Gen Z is more likely to believe a greater diversity of musical content (44% vs. 32% 24+), exposure to new artists (29% vs. 13%) and having more Canadian music would improve the commercial AM/FM radio experience (21% vs. 12%). They are also more likely to agree that promoting French-language artists is essential to ensuring a strong French-language culture in Canada (52% vs. 38% 24+) and to be interested in hearing more French-language music on commercial radio (39% vs. 15%).
- Boomers are more likely to cite more timely news coverage (25% vs. 15%) as improvements that can be made to commercial radio and less likely to mention wanting more exposure to new artists (7% vs. 18% under 56). Boomers are also less likely to feel it is important to have access to phone-in games or contests (6% vs. 13%) or to agree that there is not enough programming offered on commercial radio in their preferred language (11% vs. 17%).
- Boomers are more likely to believe streaming music services should be required to support the Canadian broadcast sector (60% vs. 49% 55 and under) and to support the CRTC requiring streaming services to contribute financially towards the Canadian broadcasting system (59% vs. 51% 55 and under) and ensuring a minimum amount of Canadian content is included in their playlists on a weekly basis (55% vs. 47%).
- Boomers are more likely to rate having access to CBC Radio/ ICI Radio-Canada as being highly important (33% vs. 26% 55 and under). They are also less likely to feel it is important to have access to podcasts (11% vs. 23%).
- Boomers (aged 56+) are among the most likely to say they typically listen to commercial AM/FM radio on traditional radio (47% vs. 33%) or their home sound system (13% vs. 5%). Gen Z (18-23) and Millennials (24-39) are more likely to use their smartphones (16% vs. 6% 40+) or smart speakers (9% vs. 4%).
- Gen Z is most likely to typically use their smartphone to listen to CBC Radio/ ICI Radio-Canada (29% vs. 9% 24+). Boomers are more likely to typically use traditional AM/FM radio (48% vs. 27% 55 and under) and are less likely to listen to CBC Radio/ ICI Radio-Canada on their computer (10% vs. 19%).

- Boomers are far less likely to use their smartphone, when utilizing streaming music services (32% vs. 66% 55 and under). They are also less likely to use smart speakers (3% vs. 9% 55 and under) or their smartphone (27% vs. 61%) when listening to podcasts and more likely to use their computer (63% vs. 39%).

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. They are also more familiar with the company(ies) that are responsible for operating the commercial radio station(s) they listen to and to have an opinion regarding concentration of ownership.

Key statistical differences between Indigenous and non-Indigenous respondents include:

- Indigenous respondents are more likely to agree there is not enough programming offered on commercial radio in their preferred language (25% vs. 14%) and less likely to feel it is important to promote Canadian artists through Canadian content rules (41% vs. 61% of non-Indigenous). They are also less likely to think that it is important to have access to music (48% vs. 65% non-Indigenous) or international news (40% vs. 24%) content on commercial radio.
- Indigenous respondents are more likely to list the sense of atmosphere commercial radio creates (19% vs. 7% of non-Indigenous respondents), as what they like most about it, and less likely to mention because it is free of charge (43% vs. 61%).
- When asked what is needed to improve commercial radio, Indigenous respondents are more likely to say they want more Canadian music (23% vs. 12% of non-Indigenous respondents) and content in their preferred language (13% vs. 3%).
- Indigenous respondents are more likely to claim to know which company operates the commercial radio station(s) they listen to (48% vs 30% non-Indigenous respondents) and are less likely to say they don't know when asked how concerned they are about the concentration of ownership of commercial radio stations (5% vs. 20% of non-Indigenous respondents).
- Indigenous respondents are among the most likely to report listening to podcasts, on at least a weekly basis (34% vs. 21%) and to rate having access to podcasts as being highly important (33% vs. 18% of non-Indigenous). They are also more likely to listen to podcasts on smart speakers (25% vs. 7% of non-Indigenous respondents) and commercial AM/FM radio on smartphones (20% vs. 9%).
- Satisfaction (8-10 on 10 pt scale) with streaming music services is much lower among Indigenous (36%) than non-Indigenous (55%) Canadians.

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.

The key statistical differences are as follows:

- Those born in Canada are more likely to listen to commercial radio on at least a weekly basis (70% vs. 57% not born in Canada), to rate having access to commercial AM/FM radio as important (46% vs. 37%) and to express satisfaction with the listening experience (49% vs. 39%).
- Those born in Canada are more likely to be satisfied with the availability of programming in their preferred language (70% vs. 50% born abroad), the availability of local content from where they live (40% vs. 32%), the frequency of information (46% vs. 37%), and the quality of programming (42% vs. 34%).
- Those born outside Canada are more likely to rate having access to international news on commercial radio as being highly important (49% vs. 38% born in Canada) and less likely to feel music is important (59% vs. 66%).
- When asked what they like most about commercial radio, those born outside Canada are more likely to cite the quality of discussion (21% vs. 14% born in Canada) and less likely to mention the connection to their local community (21% vs. 32%). When it comes to improving commercial radio, those born outside Canada would like to have access to more content in their preferred language (8% vs. 3%).
- Those born in Canada are more likely to think Canadian content requirements for special interest music should be increased (35% vs. 27% born outside of Canada). While those born outside Canada are less likely to agree that promoting Canadian artists and music is essential to ensuring a strong Canadian culture (56% vs. 64%) but are more likely to express interest in hearing more French-language music on commercial radio (22% vs. 16% born in Canada) and agree that not enough programming is offered in their preferred language (20% vs. 14%).
- Those born outside of Canada are also less likely to agree that streaming music services should be required to support the Canadian broadcast sector (48% vs. 54%) and to agree that any future regulations placed on steaming music services should not interfere with consumers' ability to choose the content they want (59% vs. 70%).
- Those born in Canada are more likely to claim to know which company(ies) operate the radio station(s) they listen to (32% vs. 23% born outside of Canada).
- Those born outside Canada are less likely to typically listen to commercial AM/FM radio broadcasts on traditional radio (30% vs. 40% born in Canada), streaming music (9% vs. 16%), satellite radio (46% vs. 66%) or podcasts (6% vs. 11%) on their car radio and are more likely to listen to CBC Radio/ ICI Radio-Canada on their smartphone (16% vs. 10%).

6. DIFFERENCES BY OFFICIAL LANGUAGE

This section addresses differences by official language and data has been analyzed by those whose preferred language is English (n=1381) or French (n=354). Behaviours, attitudes, and opinions towards commercial radio vary considerably 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.

They are 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 express concerns about the concentration of private radio station ownership. Anglophones are more likely to admit they don't pay a whole lot of attention to whether the artist is Canadian or not when listening to music.

The primary differences by Official Language are as follows:

- Francophones are more likely to rate having access to commercial AM/FM radio (55% vs. 43%) and CBC/ ICI Radio-Canada (43% vs. 25% of Anglophones) as highly important and less likely to feel having access to streaming music services (22% vs. 29%) is as important.
- Anglophones are more likely to indicate that it is important (8-10 on 10 pt scale) for them to have access to weather (52% vs. 43% of Francophones) on commercial radio and less likely to feel talk radio (20% vs. 28%), current affairs (30% vs. 38%) or international news (39% vs. 45%) are as important.
- Francophones are less likely to be satisfied with the availability of programming in their preferred language on commercial radio (51% vs. 69% of Anglophones).
- When asked what they like most about commercial radio, Francophones are more likely to mention the sense of atmosphere it creates (17% vs. 6% of Anglophones), the quality of discussion (22% vs. 14%), reliability of information (33% vs. 25%), and the variety of programming (31% vs. 22%). They are less likely to mention their connection to their local community (12% vs. 34%), convenience (22% vs. 33%), or that it is free of charge (50% vs. 62%).
- In terms of improvements that could be made, Francophones are more likely to say they would like to see more French-language music (24% vs. 2% of Anglophones), timely news coverage (22% vs. 18%), or have access to more content in their preferred language (7% vs. 3%). Anglophones are more likely to think no improvements are needed (19% vs. 13% of Francophones).
- Francophones are more likely to believe that promoting Canadian artists is essential to ensuring a strong Canadian culture (71% vs. 61%) and promoting French-language artists is essential to ensuring a strong French-language culture in Canada (72% vs. 33%). They are more likely to agree that it is important to continue to promote Canadian artists through Canadian content rules (69% vs. 59% of Anglophones) and that more should be done to promote new Canadian artists on commercial radio (61% vs. 49%). They are also more likely to feel there is not enough local content offered on commercial radio (44% vs. 25%) or available in their preferred language (37% vs. 10%), to think commercial radio is too focused on popular music (59% vs. 49%) and to express concern about the concentration of ownership (53% vs. 45%).
- Anglophones are more likely to admit they don't pay a whole lot of attention to whether the artist is Canadian or not when listening to music (61% vs. 42% of Francophones).
- Support for current Canadian content rules is much higher among Francophones (popular music: 66% support vs. 59% of Anglophones, special interest music: 58% support vs. 52% of Anglophones). Francophones are also more likely to say they would like to see the Canadian content requirements for popular and special interest music increase in the future (popular music: 43% support vs. 28% of Anglophones, special interest music: 44% vs. 32%).
- Francophones are more likely to think streaming music services should be required to support the Canadian broadcasting sector (65% vs. 51%) and support requiring streaming services to contribute financially towards the Canadian broadcasting system (66% vs. 52% of Anglophones)

and ensure a minimum amount of Canadian content is included in their playlists on a weekly basis (66% vs. 47%).

- Nearly twice as many Francophones (52% vs. 28% Anglophones) report listening to CBC Radio/ ICI Radio-Canada at least weekly and are more likely to be satisfied with the listening experience (58% vs. 45%). Anglophones are more likely to listen to satellite radio (19% vs. 12% of Francophones) or streaming music services (41% vs. 31%) on at least a weekly basis.
- Regarding listening modes, Anglophones are more likely to listen to commercial radio (81% vs. 73%) or CBC Radio/ ICI Radio-Canada on their car radio (57% vs. 42% of Francophones) and less likely to listen to either on traditional radio (Commercial radio- 36% vs. 51%, CBC Radio/ ICI Radio-Canada 33% vs. 41%). Francophones are more likely to listen to podcasts on their home sound system (7% vs. 3% of Anglophones) or traditional radio (10% vs. 2%).
- Anglophones are more likely to listen to streaming music services on their smartphone (59% vs. 51% of Francophones), car radio (16% vs. 9%) or smart speakers (22% vs. 15%). They are also more likely to report listening to satellite radio on their car radio (65% vs. 45% of Francophones) but are less likely to listen on traditional radio (5% vs. 11%).

7. DIFFERENCES BY RADIO LISTENERSHIP

This section addresses differences in responses between those who listen to commercial AM/FM radio (n=1544) and those who never listen to commercial AM/FM radio (n=191).

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 required to increase in the future. They also express stronger support requiring steaming music services to support the Canadian broadcast sector. They are also much more likely than non-listeners to think there is not enough local content on commercial radio and that more should be done to promote emerging Canadian artists on commercial radio.

The primary differences are as follows:

- Canadians who listen to commercial radio are more likely to feel it is important (8-10 on 10 pt scale) for them to have access to commercial radio (48% vs. 14% of non-listeners) and CBC Radio/ ICI Radio-Canada (29% vs. 22%). They are also more likely to report listening to CBC Radio/ ICI Radio-Canada (34% vs. 18% of non-listeners), podcasts (22% vs. 16%), or streaming music services (40% vs. 28%) on a weekly basis than non-listeners.
- Commercial radio listeners are more likely to believe that promoting Canadian artists and music is essential to ensuring a strong Canadian culture (64% vs. 48%) and think it is important to continue to promote Canadian artists through Canadian content rules (62% vs. 45%).
- They are also more likely to feel as though there is not enough local content offered on commercial radio (30% vs. 20%) and believe more should be done to promote emerging Canadian artists (53% vs. 36%), but are also more likely to say they don't pay a lot of attention to whether or not the artist is Canadian when they listen to music (59% vs. 50% non-listeners).
- Commercial radio listeners are more likely to support Canadian content rules for popular (62% vs. 46%) and special interest (54% vs. 40%) music and to want the percentage requirements for Canadian content to increase for both popular (31% vs. 21% of non-listeners) and special interest (35% vs. 23%) music.
- They are more likely to think streaming music services should be required to support the Canadian broadcast sector (54% vs. 45%) and to support CRTC requiring streaming services to contribute financially towards the Canadian broadcasting system (56% vs. 37% of non-listeners)

and ensure a minimum amount of Canadian content is included in their playlists on a weekly basis (51% vs. 36%). However, they are also more likely to agree that any future regulations placed should not interfere with consumers' ability to choose the content they want (69% vs. 58%).

- Commercial radio listeners who listen to podcasts are more likely (at 8%) than non-listeners (1%) to report doing so on smart speakers. Non-listeners who listen to satellite radio are more likely to do so via a computer (28% vs. 12% of commercial radio listeners).

8. DIFFERENCES BY COMMERCIAL RADIO DEVICE USAGE

This section addresses differences in responses between those who listen to commercial radio sources online (n=343) and offline (n=1437). 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. Those who use online sources are more likely to be under 40.

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.

The primary differences between online vs. offline commercial radio listeners are as follows:

- Canadians who listen to commercial radio online are more likely to feel as though it is important to have access to commercial AM/FM radio (56% vs. 50% offline), podcasts (29% vs. 18%), streaming music services (37% vs. 28%), and satellite radio (19% vs. 15%). They are also more likely to rate having access to talk radio (29% vs. 22%), phone-in games (21% vs. 10%), current affairs (39% vs. 32%) or international news (48% vs. 40% offline) content as being highly important to them.
- When asked what they like most about commercial radio, offline listeners are more likely to cite the fact that it is free of charge (61% vs. 54% online) and less likely to mention the sense of atmosphere (7% vs. 13%), quality of discussion (15% vs. 20%), or the ability to discover new artists and music (18% vs. 24%).
- Online commercial radio listeners are more likely to feel there is not enough commercial radio programming offered in their preferred language (22% vs. 15% offline).
- In terms of improvements that could be made to commercial radio, online listeners are more likely to mention having more exposure to new artists (19% vs. 14% offline), greater programming variety (20% vs. 14%), and access to more content in their preferred language (7% vs. 3%).
- Those who listen to commercial radio online are more likely to support Canadian content requirements for popular music (36% vs. 31% offline).
- Online commercial radio listeners are more likely to indicate that they know the name of the company(ies) that operate the commercial radio station(s) they listen to (39% vs. 31%) and to express concerns about the concentration of ownership (50% vs. 43% offline).
- When it comes to listening frequency, those who listen to online commercial radio are more likely to report listening to CBC Radio/ ICI Radio-Canada (40% vs. 34% online), podcasts (31% vs. 21%), and streaming music services (52% vs. 40%) on at least a weekly basis.

9. COMPARISON TO VOLUNTARY SURVEY RESULTS

In order to allow the Canadian public to participate in the consultation process a separate voluntary version of the survey was executed and promoted through the CRTC's website and social media channels. In total, the voluntary public survey garnered 2,969 responses. Responses from the voluntary public survey were compared to the panel survey to identify statistically significant differences across measures.

Those who responded to the voluntary public survey are more likely to be male (65%), Francophone (61%), 40 years of age or older (68%), and living in Quebec (60%), compared to the actual proportions of the Canadian population. A full detailed profile of respondents to the voluntary public survey can be found in the appendix of this report.

Those who took the voluntary public survey are more likely than those who responded to the panel survey to report listening to commercial AM/FM radio at least weekly and are far more likely to think it is important to have access to commercial AM/FM radio, as well as access to most types of content via commercial radio.

Voluntary public survey participants are more likely to agree that 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. They are also more likely to support all current Canadian content rules, and 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).

However, satisfaction with the commercial AM/FM radio listening experience is significantly lower among voluntary public survey participants including satisfaction with the quality of programming, programming diversity, promotion of Canadian artists, and the availability of programming in their preferred language. They are also more concerned about the concentration of ownership of private radio stations limiting the diversity of opinions and music genres available to Canadians or Canadians' access to different sources of information.

The primary differences are as follows:

- Voluntary public survey participants are more likely than panel survey respondents to report listening to commercial AM/FM radio (76% vs. 68% rep survey), CBC Radio/ ICI Radio-Canada (62% vs. 32%), podcasts (34% vs. 22%), or streaming music services (60% vs. 39%) at least weekly and less likely to listen to satellite radio (15% vs. 17%). They are also more likely to feel having access to commercial AM/FM radio (64% voluntary vs. 45% panel), CBC Radio/ ICI Radio-Canada (61% vs. 28%), podcasts (34% vs. 19%), or streaming music services (49% vs. 28%) as highly important.
- Those who took the voluntary public survey are also more likely to say it is important for them to have access to most types of content on commercial AM/FM radio including local news (73% vs. 57% panel survey), national news (66% vs. 48%), international news (56% vs. 40%), music (83% vs. 64%), talk radio (35% vs. 22%), and in-depth analysis of current affairs (54% vs. 31%). They are less likely, however, to feel it's important to have access to phone-in games (6% vs. 10%) or weather (45% vs. 51%).
- Those who took the voluntary public survey are less likely to express satisfaction with listening experience on commercial radio (38% vs. 47%) and are more likely to express satisfaction with podcasts (60% vs. 47% panel survey) or CBC Radio/ ICI Radio-Canada (64% vs. 48%). They are

also less likely to be satisfied with most aspects of commercial radio including satisfaction with the quality of programming (41% vs. 35% voluntary public survey), programming diversity (32% vs. 19%), promotion of Canadian artists (30% vs. 24%), and the availability of programming in their preferred language (66% vs. 52%).

- Voluntary public survey participants cite having more exposure to new artists (35% vs. 14%), more Canadian music (18% vs. 12%), more French-language music (41% vs. 6%), more diversity of musical content (55% vs. 33%), and access to more content in their preferred language (8% vs. 4%) as areas where improvement can be made. They are also more likely to feel as though there is not enough local content (47% vs. 28% panel survey) or programming offered in their preferred language (32% vs. 15%) and that commercial radio stations are too focused on popular music (74% vs. 51% panel survey).
- Panel survey respondents are more likely to say they like commercial radio because it is free of charge (60% vs. 53% of voluntary public survey participants) and are less likely to mention quality of discussion (15% vs. 21%), the sense of atmosphere (8% vs. 13%), or the ability to discover new artists and music (19% vs. 35%). Fewer panel survey respondents think any improvements need to be made to commercial radio (no improvement 18% panel vs. 5% voluntary public survey). However, of those who do are more likely to mention having less advertisements (43% vs. 37% voluntary public survey) and more timely news coverage (18% vs. 15%).
- Voluntary public survey participants are more likely to think promoting Canadian artists and music is essential to ensuring a strong Canadian culture (79% vs. 62%) and that promoting French-language artists is essential to ensuring a strong French-language culture in Canada (66% vs. 39%). They are also more likely to agree that it is important to continue to promote Canadian artists through Canadian content rules (77% vs. 60% panel survey) and feel like more should be done to promote new and emerging Canadian artists on commercial radio (71% vs. 51%).
- Support for the current Canadian content rules is higher among voluntary public survey participants – including for popular music (65% vs. 60% panel survey), special interest music (60% vs. 53%) and French-language music (75% vs. 60%). They are also are more likely to support increasing French-language music requirements in the future (61% vs. 36% panel), while those who took the panel survey are more likely to support increasing requirements for popular (30% panel vs. 25% voluntary) and special interest music (34% vs. 30%).
- Voluntary public survey participants are more likely to agree that streaming music services should be required to support the Canadian broadcast sector (75% vs. 53% panel survey) and to support requiring streaming services to contribute financially towards the Canadian broadcasting system (77% vs. 54%) or ensure a minimum amount of Canadian content is included in their playlists on a weekly basis (66% vs. 50%). However, they are also more likely to feel that any future regulations placed on steaming music services should not interfere with consumers' ability to choose the content they want (75% vs. 68%).
- Voluntary public survey participants are more likely to say they know which companies operate the commercial radio station(s) they listen to (49% vs. 31% panel survey), to express concern about the concentration of ownership (73% vs. 42%) and to agree that concentration of ownership of private radio stations will limit the diversity of opinions and music genres available to Canadians (74% vs. 46%) or will limit Canadians' access to different sources of information and impact their ability to remain well informed (71% vs. 45%).
- Panel survey participants are more likely to agree that they don't pay a lot of attention to whether or not an artist is Canadian (58% vs. 35% voluntary public survey) and believe that if a Canadian artist is good enough, they will be discovered (42% vs. 31%).

- Those who took the voluntary public survey tend to be more likely to listen to commercial AM/FM radio, CBC Radio/ ICI Radio-Canada, or streaming music services on most types of devices. Those who took the voluntary public survey are also more likely to listen to podcasts on their smartphone (65% vs. 52% panel survey), car radio (14% vs. 10%) or home sound system (8% vs. 4%).

The demographic characteristics of the surveyed populations from the panel and voluntary surveys are presented below. **Data presented in the tables below for the panel survey are weighted proportions.**

Figure 16: Profile of Respondents

Age	Panel survey	Voluntary survey
Gen Z (18-23)	7%	3%
Millennials (24-39)	28%	28%
Gen X (40-55)	28%	36%
Boomers (56+)	37%	32%
Gender		
Male	49%	65%
Female	51%	34%
Region		
British Columbia	14%	5%
Alberta	11%	5%
Saskatchewan	3%	1%
Manitoba	4%	1%
Ontario	38%	25%
Quebec	23%	60%
New Brunswick	2%	1%
Nova Scotia	3%	1%
Prince Edward Island	1%	>0%
Newfoundland and Labrador	2%	>0%
Income		
<$40,000	21%	14%
$40,000-<$60,000	14%	15%
$60,000 - <$100,000	24%	23%
$100,000+	24%	31%
Prefer not to say	17%	17%
Born in Canada		
Yes	83%	93%
No	17%	7%
Indigenous Status		
Indigenous	3%	2%
Non Indigenous	97%	98%
Presence of Children Under 18 in Household		
Yes	21%	29%
No	79%	71%

APPENDIX

DETAILED METHODOLOGICAL NOTE

Quantitative Panel Survey

1. Survey Methods

Ipsos conducted a ~10-minute online survey among a sample of n=1735 Canadians aged 18 years and older (including a small oversample in Quebec to achieve a minimum of n=500 Quebec residents) stratified to the actual proportion of the Canadian population based on the 2016 Census by age, gender and region. Fieldwork for the rep survey was conducted between Thursday, November 12th and Thursday, November 26, 2020).

The survey was administered among a general public audience using panel-based resources for data collection. Respondents for this survey were selected from among those who have volunteered to participate in online surveys. The panel provides a number of innovative incentive programs to participants tailored to the specific requirements of each survey, depending on the length of the survey, the subject matter of the study, and the time required to complete a minimum number of interviews. A point-based system is used where participants can redeem points for various items.

Weighting has been applied to ensure that the sample proportions match the characteristics of the population according to the 2016 Census, by age, gender, and region. Ipsos does not calculate a margin of error for online surveys because online surveys are considered non-probabilistic. A credibility interval is used instead. The credibility interval for a sample of this size of ± 2.7% in 19 cases out of 20.

The table below compares the unweighted sample to the 2016 Census results by region, age, and gender, as well as the weighted geographical and demographic distribution of the sample.

Figure 17: Sample frame

	Definition	Unweighted Sample size	Sample proportions	Census 2016 Proportions
Age	18 – 24	183	10%	11%
	25 – 34	304	17%	16%
	35 – 44	272	16%	16%
	45 – 54	311	18%	18%
	55 – 64	297	17%	17%
	65+	368	21%	21%
Gender	Male	844	49%	49%
	Female	891	51%	51%
Region				
	Prince Edward Island	10	1%	>1%
	Nova Scotia	43	3%	3%
	New Brunswick	26	2%	2%

	Quebec	500	23%	23%
	Ontario	612	38%	38%
	Manitoba	64	4%	4%
	Saskatchewan	49	3%	3%
	Alberta	176	11%	11%
	British Columbia	225	14%	14%
	Newfoundland and Labrador	30	2%	2%

2. Response Rate

The following table provides the response dispositions and response rate calculation for the online rep survey.

Figure 18: Response Rate Calculation

Calculation for Panel Survey	#
Total Email Invitations Issued	**6290**
Unresolved (U) (no response)	**3450**
In-scope - non-responding (IS)	**224**
Qualified respondent break-off (incomplete)	224
In-scope - Responding units (R)	**2955**
Over quota	1107
Other disqualified	113
Completed Interviews	1735
Response Rate = R/(U+IS+R)	**45%**

3. Non-Response Analysis

There exists within the current sample the possibility of non-response bias. In particular, this survey would not include members of the population who do not have access to the Internet (either via a personal computer or mobile device) or who are not capable of responding to a survey in either English or French. In addition, some groups within the population are systemically less likely to answer surveys. Variations in proportions have been corrected in the weighting to reflect 2016 Canadian Census values.

Quantitative Voluntary Public Survey

Ipsos conducted a ~10-minute online survey among a sample of n=2969 respondents. Fieldwork was conducted between Thursday, November 12 and Thursday, November 26, 2020. The survey was voluntary and made public through the CRTC's website and social media channels. The survey was executed through Ipsos' online survey platform and no restrictions were placed on participating aside from ensuring participants were 18 years of age or older and standard industry screening. The voluntary public survey is not intended to be representative of the broader Canadian population. A response rate and analysis of non-response bias cannot be completed due to the voluntary nature of the survey.

Qualitative Research

Thirteen focus groups were conducted online with participants from across Canada between March 19th and 31st, 2020. Nine groups were conducted in English, and four groups were conducted in French.

Twelve focus groups were conducted with those who listen on a regular basis to commercial radio, with at least half of each group who listen at least 5 times per week. One focus group was conducted with those who do not listen to commercial radio and listen to other audio content and formats such as podcasts and music streaming.

Figure 19: Qualitative Fieldwork details

Variable	Number of participants
Location	
Ottawa, ON	7
Timmins English, ON	4
Timmins French, ON	6
Toronto, ON	8
Western Canada	7
Montréal English, QC	8
Montréal French, QC	8
Vancouver, BC	7
Halifax, NS	5
Eastern Canada	6
National Non-Listeners	7
Gatineau French, QC	8
Province of Quebec French	7
How often do you listen to commercial radio?	
5 times per week	55
2-4 times per week	26
Once per week	0
Once per month or less	0
Never	7
Age	
34 years and younger	30
35-44 years old	25
45-54 years old	17
55 years old or older	16
Household income	
Under $20,000	1
$20K to $40K	13
$40K to $60K	11
$60K to $80K	22
$80K to $100K	19
$100K to $150K	14
$150K or more	6
Refused	2
Language	
English-speakers	59
French-speakers	29

It should be noted that the qualitative findings are not generalizable to a larger population, and that they should be considered directional only.

QUESTIONNAIRE

CRTC Radio- Public Opinion Research
Quantitative Survey (Panel)

SCREENING QUESTIONS

1a. Do you prefer to continue in English or French?
English
French

1. What is your date of birth?

YEAR
_1915
...
_2018

MONTH
January
February
March
April
May
June
July
August
September
October
November
December
[TERMINATE IF UNDER 18 YEARS OLD]

2. What is your gender?

Male
Female
I self-identify using another term

3. What are the first three digits of your postal code? (example: A8A 8A8)

[Record X#X X#X]
Prefer not to answer

[HIDDEN VARIABLE]
REGION:
Prince Edward Island

Nova Scotia
New Brunswick
Quebec
Ontario
Manitoba
Saskatchewan
Alberta
British Columbia
Newfoundland and Labrador
Northwest Territories
Yukon Territory
Nunavut

[if q3=prefer not to answer ask q3a]

3a. Where do you live?

Prince Edward Island
Nova Scotia
New Brunswick
Quebec
Ontario
Manitoba
Saskatchewan
Alberta
British Columbia
Newfoundland and Labrador
Northwest Territories
Yukon Territory
Nunavut
Prefer not to answer

[if q3a=prefer not to answer thank and terminate]

4. In which industries or professions do you, or any member of your immediate household, work? Please select all that apply.

_1 Advertising/Public Relations
_2 Automotive
_3 Beauty/Cosmetics
_4 Education
_5 Electronics/Computer/Software
_6 Fashion/Clothing
_7 Financial Services
_8 Food/Beverages
_9 Government/Politics
_10 Grocery/Convenience/Department Stores

_11 Healthcare/Pharmaceuticals
_12 Internet/E-Commerce
_13 Insurance
_14 Management Consulting
_15 Marketing/Market Research
_16 Movie Studio
_17 Movie Theater or Theater Chain
_18 Music
_19 Paper Products
_20 Personal Care/Toiletries
_21 Pets (Grooming, Veterinary, Retail, Training)
_22 Publishing (Newspaper, Magazines, Books)
_23 Radio
_24 Real Estate/Construction
_25 Restaurants
_26 Sales/Sales Promotion
_27 Sports
_28 Telecommunications (phone, cell phone, cable)
_29 Television (Studio/Network/Cable/Satellite)
_30 Toys
_31 Transportation/Shipping
_32 Travel/Tourism
_33 Video Games
_34 Other Entertainment
_35 None of the above [Exclusive]

[IF 1, 15, 22, 23, 29 TERMINATE, OTHERWISE CONTINUE]

[IF YES TO CODE 9 AT Q4 ASK Q5]

5. Do you, or any member of your immediate household, work for any of the following organizations? Please select all that apply.

Canadian Heritage
Competition Bureau Canada
Innovation, Science and Economic Development Canada (ISED)
Canadian Radio-Television and Telecommunications Commission (CRTC)
None of the above
[IF NONE OF THE ABOVE CONTINUE, OTHERWISE TERMINATE]

RADIO HABITS AND LISTENING

We'd like to start by asking a series of questions about your listening habits and impressions of a variety of broadcast programming. When responding to the following questions, please consider your typical listening habits **before** the current situation with COVID-19 began.

6. Generally speaking, how important it is for you to have access to each of the following broadcasting platforms? Using a scale from 1 to 10, where 1 is Not at all important and 10 is Extremely important.

[ROWS][RANDOMIZE]
Commercial AM/FM radio (excluding campus/community stations)
CBC Radio and/or ICI Radio-Canada
Podcasts
Streaming music services (i.e. Spotify, Apple Music, iHeartRadio, etc.)
Satellite radio (Sirius XM)

[COLUMNS]
SCALE 1-10, 1 "Not at all important", 10 "Extremely important"

7. How frequently do you listen to programming on each of the following broadcasting platforms? Please select one response per item.

[ROWS][RANDOMIZE]
Commercial AM/FM radio (excluding campus/community stations)
CBC Radio and/or ICI Radio-Canada
Podcasts
Streaming music services (i.e. Spotify, Apple Music, iHeartRadio, etc.)
Satellite radio (Sirius XM)

[COLUMNS]
Everyday or almost everyday
2-3 times a week
Weekly
2-3 times a month
Monthly
Once every three months
Less often than once every three months
Never

8. And on which device(s) do you typically listen to each of the following broadcasting platforms? Please select at least one response per item.

[ROWS]
[INSERT ITEMS FROM Q7 WHERE RESPONSE IS NOT 'NEVER']

[COLUMNS]
Car radio/car sound system
Traditional AM/FM radio
Desktop computer, laptop or tablet
Smartphone
Smart speakers (i.e. Amazon's Alexa, Google Home, etc.)
Home sound system
Other

9. Overall, how satisfied are you with your listening experience with each of the following broadcasting platforms? Using a scale from 1 to 10, where 1 is 'very dissatisfied' and 10 is 'very satisfied'. Please select one response per item.

[ROWS]
[INSERT ITEMS FROM Q7 WHERE RESPONSE IS NOT 'NEVER']

[COLUMNS]
SCALE 1-10: 1 'Very dissatisfied' 10 'Very satisfied'

[IF SELECTED NEVER FOR COMMERCIAL RADIO AT Q7 SKIP Q10, Q11, Q12, Q13]

10. Thinking specifically about commercial AM/FM radio, how important is it to you to have access to the following types of content? Using a scale from 1 to 10, where 1 is Not at all important and 10 is Extremely important.

[ROWS][RANDOMIZE]
Local news
National news [ALWAYS KEEP WITH PREVIOUS]
International news [ALWAYS KEEP WITH PREVIOUS]
Weather
Traffic
Music
Talk radio (i.e. opinion-based, sports)
Phone-in games or contests
In-depth analysis of current affairs/issues

[COLUMNS]
SCALE 1-10, 1 Not at all important, 10 Extremely important

11. What are the things that you like **most** about commercial radio? Please select up to three of the following.

[RANDOMIZE]
Free of charge
Variety of music genres
Sense of atmosphere it creates
Connection to local community
Reliable source of information
Variety of programming (i.e. mix of information, talk, music, etc.)
Quality of discussion of current affairs/issues
Entertainment value (i.e. talking/ banter, contests, games, etc.)
Ability to discover new artists and music
Convenience and simplicity
Other: Please specify [TEXT BOX][ANCHOR]

12. What, if anything, do you feel **needs to be improved most** about commercial radio? Please select up to three of the following.

[RANDOMIZE]
Greater variety of programming (i.e. mix of information, talk, music, etc.)
More local content from where I live
More diversity of musical content (i.e. less repetition of songs, artists or genres)
More Canadian music
More exposure to new artists
More French-language music
Fewer advertisements
More timely news coverage
Access to more content in my preferred language
Other: Please specify [TEXT BOX]
No improvement needed [MUTUALLY EXCLUSIVE][ANCHOR]

13. How satisfied are you with each of the following aspects of commercial radio? Using a scale from 1 to 10, where 1 is ‘very dissatisfied’ and 10 is ‘very satisfied’. Please select one response per item.

[ROWS][RANDOMIZE]
Variety of programming (i.e. mix of information, talk, music, etc.)
Quality of programming
Quality of information (i.e. news, weather, traffic)
Frequency of information (i.e. news, weather, traffic)
Diversity of songs, genres and artists
Promotion of Canadian artists, including new artists
Availability of programming in my preferred-language
Availability of local content from where I live

[COLUMNS]
SCALE 1-10: 1 ‘Very dissatisfied’ 10 ‘Very satisfied’
Don’t know enough to provide an opinion

CANADIAN CONTENT AND FRENCH-LANGUAGE MUSIC

We would now like to explore Canadian content and French-language music.

[SHOW ON SEPARATE SCREEN BEFORE PROCEEDING TO NEXT QUESTION]
The following are rules regarding Canadian content currently in place for broadcast radio in Canada. These regulations are overseen by the Canadian Radio-Television and Telecommunications Commission (CRTC). The Commission is an administrative tribunal that regulates and supervises broadcasting and telecommunications in the public interest. **Please review before proceeding to the next screen.**

Canadian content requirements for Popular Music (e.g. pop, rock, dance, country)

Commercial, community, campus and Indigenous radio: English-language and French-language stations must ensure that at least 35% of the Popular Music they broadcast each week is Canadian.

To ensure that Canadian selections are not relegated to times when relatively small audiences are tuned to radio, such as on weekday late evenings and on weekends, English-language and French-language stations must ensure that at least 35% of the Popular Music broadcast between 6:00 a.m. and 6:00 p.m. Monday to Friday is Canadian.

Canadian content requirements for Special Interest Music (e.g. Folk, Jazz and Blues, International music)
Commercial radio: English-language and French-language commercial radio stations must ensure that at least 10% of all Special Interest Music broadcast is devoted to Canadian selections.

[ONLY SHOW FOR FRENCH-SPEAKING RESPONDENTS] Rules regarding French-language vocal music: French-language commercial radio stations must devote each week at least 65% of Popular music selections (such as pop, rock, dance, country) to French-language musical selections.

To ensure that French-language selections are not consigned to periods with relatively small audiences, they must also ensure that at least 55% of Popular music selections aired each week between 6 a.m. and 6 p.m., Monday through Friday, be French-language selections.

14. How much do you support or oppose the Canadian content rules for commercial radio that are currently in place?

[ROWS]
Canadian content – Rules applicable to English and French- language commercial stations [HEADER]
- **Popular Music (at least 35% must be Canadian content during broadcast week and peak listening hours)**
- **Special Interest Music (at least 10% must be Canadian content during broadcast week)**

[ONLY SHOW FOR FRENCH-SPEAKING RESPONDENTS] French-language vocal music – Rules applicable only to French-language commercial stations [HEADER]
- **Popular Music (at least 65% must be French-language music; 55 % during peak listening hours)**

[COLUMNS]
Strongly support
Somewhat support
Neither support nor oppose
Somewhat oppose
Strongly oppose
Don’t know enough to provide an opinion

15. If these regulations were to be changed in the future, do you feel the percentage of required content that must be played should increase, decrease or stay the same?

[ROWS][RANDOMIZE]
Canadian content requirements for Popular Music (currently at least 35% must be Canadian content during broadcast week and peak listening hours)
Canadian content requirements for Special Interest Music (currently at least 10% must be Canadian content during broadcast week)
[ONLY SHOW FOR FRENCH-SPEAKING RESPONDENTS] French-language vocal music (currently at least 65% must be French-language music; 55 % during peak listening hours)

[COLUMNS]
Increase a lot
Increase somewhat
Stay the same
Decrease somewhat
Decrease a lot
Don't know enough to provide an opinion

FUTURE ROLE OF REGULATION

We'd now like to discuss the future of radio regulation in Canada by the CRTC.

16. Currently there are no Canadian content rules specific to streaming services in Canada (i.e. Spotify, Apple Music, iHeartRadio, etc.). How much would you support or oppose the CRTC creating the following types of regulations?

[ROWS][RANDOMIZE]
Require streaming services to contribute financially towards the Canadian broadcasting system (i.e. percentage of revenue dedicated to Canadian promotion of artists)
Require streaming services to ensure a minimum amount of Canadian content is included in their playlists on a weekly basis

[COLUMNS]
Strongly support
Somewhat support
Neither support nor oppose
Somewhat oppose
Strongly oppose
Don't know enough to provide an opinion

[IF SELECTED NEVER FOR COMMERCIAL RADIO AT Q7 SKIP Q17]

17. Do you know which company operates the commercial radio station(s) that you listen to?

Yes
No
Not all stations

18. Commercial radio stations are generally privately owned. The CRTC regulates, among other things, the ownership of various radio stations and the concentration of ownership

authorized for a single company. In 2018, the five largest radio ownership groups in Canada garnered over 65% of total commercial radio revenues. How concerned are you about concentration of ownership of commercial radio stations in Canada (i.e. fewer companies owning more radio stations)

Very concerned
Somewhat concerned
Not very concerned
Not at all concerned
Don’t know enough to provide an opinion

GENERAL ATTITUDES

We would now like to better understand your consumption habits and opinions towards a variety of aspects of commercial radio.

19. Please indicate how much you agree or disagree with the following statements. Please provide one response per item.

[ROWS][RANDOMIZE]
When I am listening to music, I don’t pay a lot of attention to whether the artist is Canadian or not.
It is important to me that we continue to promote Canadian artists through Canadian content rules.
Promoting Canadian artists and music is essential to ensuring a strong Canadian culture.
Promoting French-language artists is essential to ensuring a strong French-language culture in Canada. [never show first on English links]
I feel more should be done to promote new and emerging Canadian artists on commercial radio.
I am concerned that concentration of ownership of private radio stations will limit the diversity of opinions and music genres available to Canadians.
I am concerned that concentration of ownership of private radio stations will limit Canadians’ access to different sources of information and impact on our ability to remain well informed.
Streaming music services (i.e. Spotify, Apple Music, iHeartRadio, etc.) should be required to support the Canadian broadcast sector (i.e. percentage of revenue dedicated to Canadian promotion of artists)
Any future regulations placed on steaming music services (i.e. Spotify, Apple Music, iHeartRadio, etc.) should not interfere with consumers’ ability to choose the content they want.
[IF RESPONDING TO THE SURVEY IN ENGLISH] I would be interested in hearing more French-language music on commercial radio.
[IF RESPONDING TO THE SURVEY IN FRENCH] I would be interested in hearing more English-language music on commercial radio.
Commercial radio stations are too focused on popular music and should play a greater variety of musical genres (songs, artists and genres).
I don’t feel there is enough local content offered on commercial radio from where I live.
I don’t feel there is enough programming offered on commercial radio in my preferred language.
If a Canadian artist is good enough, they will become discovered without the need for specific Canadian content rules.

[COLUMNS]
Strongly agree
Somewhat agree
Neither agree nor disagree
Somewhat disagree
Strongly disagree
Don’t know enough to provide an opinion

20. Are there any other comments about your experience with commercial radio in Canada or any other topics we have discussed in this survey that you would like to share?

[TEXT BOX]
No comment

DEMOGRAPHIC QUESTIONS

We have a couple final questions for statistical classification purposes. Please indicate the answer that best describes you. Be assured that your responses will be held in strict confidence.

21. What was your total household income, before taxes, in 2019?

- Under $20,000
- $20,000 to under $30,000
- $30,000 to under $40,000
- $40,000 to under $50,000
- $50,000 to under $60,000
- $60,000 to under $80,000
- $80,000 to under $100,000
- $100,000 to under $120,000
- $120,000 or more
- Prefer not to say

22. Are there any children 18 years or younger living in your household?

- Yes
- No

23. Were you born in Canada?

- Yes
- No

24. Do you self-identify as an Indigenous person?

Yes
No

25. What is the language you use **most often** at home? *If you use more than one language at home, please select the two **most** used languages.*

[INSERT LIST AND ALLOW TWO RESPONSES ONLY]

- French
- English
- American Sign Language (ASL)
- Arabic
- Bengali
- Chinese - Cantonese
- Chinese - Mandarin
- Chinese - other
- Cree
- Dari
- German
- Gujurati
- Hindi
- Inuktitut
- Italian
- Japanese
- Korean
- Ojibwe
- Punjabi
- Quebec Sign Language (LSQ)
- Spanish
- Tagalog
- Tamil
- Urdu
- Other

Thank you. Those are all the questions we have for your today. We greatly appreciate your participation in this research.

DISCUSSION GUIDE

FOCUS GROUPS

DISCUSSION GUIDE FOR COMMERCIAL RADIO LISTENERS

FOCUS GROUPS –ONLINE/TELECONFERENCE

SESSION BREAKDOWN

Welcome and Introduction	5 Minutes
Section 1: Radio Habits and Listening	30 Minutes
Section 2: Canadian Content and Culture	30 Minutes
Section 3: Future Role of Regulation	20 Minutes
Wrap-up and Final Questions	5 Minutes
SESSION TOTAL	**90 Minutes**

DETAILED SESSION AGENDA

MODERATOR WELCOME (5 MINUTES)	• Welcome and thank for attending • Overview of the session purpose • Neutrality of Ipsos and importance of honest feedback • Rules of engagement - informed and respectful dialogue • Anonymity of your participation - remarks are not attributed and your privacy will be protected • Audio recording for notetaking purposes; observers on the phone • Technical considerations in using online Ideation Exchange platform (for online groups) • Quick round of intros - first name, location and hobbies (during first question for online groups) • **Note that today's discussion will be focused on commercial radio – that is, AM/FM local stations which are privately owned, and not public radio i.e. CBC and/or ICI Radio-Canada, Indigenous stations, ethnic specialty stations, or college and community stations. We may have a few questions about public stations, but ask that you be mindful of speaking specifically about commercial radio in your feedback unless otherwise specified.**

SECTION 1: RADIO HABITS AND LISTENING (30 MINUTES)

We are here today to have a discussion on **commercial** radio services in Canada.

Q1. I would like to start by understanding your current listening habits when it comes to commercial radio – that is, local AM and FM radio stations. Please tell me about:

- When you listen – occasions and frequency

- How and where you listen – in the car, at home, etc.
- What devices you're listening on
- What you're listening to (music, news, talk radio, other)
- ASK IN BILINGUAL / FRENCH MARKETS: Is there a difference in your listening habits whether you are listening to English language content or French language content? Why do you choose to listen to one language or the other – is it programming, personal preference, or something else?

PROBES:
- Are your listening habits different weekday vs. weekend? If so, how?
- What else are you doing when you listen to the radio?

Q2. How different are your commercial radio listening habits to other audio content such as podcasts and music streaming? Has this changed or evolved at all over the years?
PROBES:
- What need does listening to commercial radio fulfill for you? What would you miss most if you didn't have the opportunity to listen to commercial radio? What would replace it?
- Do you have needs that are unfulfilled by listening to commercial radio? Are those needs fulfilled by listening to other audio content? If so, specify those needs.
- Quality, diversity, to discover new artists and music, Canadian content

Q3. Overall, to what extent is commercial radio meeting your needs and interests? I'm going to READ/SHOW you a list and for each, please tell me what's working and/or what's missing for each.

a. For news and talk radio – quality, quantity and a source of information
b. To discover new artists and music via musical programming (interviews, promotion, reports on local and emerging artists)
c. To discover music from the other official language (i.e. in French on an English-language station)
d. For diversity of songs, genres and artists
e. For diversity of content reflecting and supporting Indigenous Peoples
f. Quality of programming

Q4. As I mentioned at the beginning, our focus is on commercial radio stations but there are public stations in Canada – i.e. CBC and ICI Radio-Canada. Do any of you listen to public radio? If so, what is the difference between the two – in terms of role and meeting your needs as a listener? How would you characterize commercial vs. public radio in your own words?

SECTION 2: CANADIAN CONTENT AND CULTURE (30 MINUTES)

Now I'd like to discuss Canadian Content and its role in our culture.
Q5. How much local content are you consuming on commercial radio, especially as it relates to local news and information? Is this important to you as a radio listener?
PROBES:
- What are the most important and relevant sources of local news and information if it's not the radio?

- Are there any gaps in local news and info? Could these be filled by radio?
- Would you feel that something was missing if local news was not available? Where else would you go to get this information?

Q6. Were you aware that there are specific Canadian content rules in Canada (CLOSED END POLL). If yes, please tell me in your own words what you believe these might be.

Q7A & Q7B. I'm going to show you a set of Canadian content rules that are overseen by the CRTC. The CRTC is an administrative tribunal that regulates and supervises broadcasting and telecommunications in the public interest.

MODERATOR TO SHOW ONLINE

Canadian content requirements for Popular Music (e.g. pop, rock, dance, country)

Commercial, community, campus and Indigenous radio

English-language and French-language stations must ensure that at least 35% of the Popular Music they broadcast each week is Canadian content.

To ensure that Canadian selections are not relegated to times when relatively small audiences are tuned to radio, such as on weekday evenings and on weekends, English-language and French-language stations must ensure that at least 35% of the Popular Music broadcast between 6:00 a.m. and 6:00 p.m. Monday to Friday is Canadian content.

Canadian content requirements for Special Interest Music (e.g. Folk, Jazz and Blues, International music)

Commercial radio

English-language and French-language commercial radio stations must ensure that at least 10% of all Special Interest Music broadcast is devoted to Canadian selections.

As well, commercial radio stations have to ensure that Special Interest Music selections, including Canadian content, are scheduled in a reasonable manner throughout the broadcast day.

If anyone asks, "Are there any exceptions?" MODERATOR TO READ:

Exceptions to Popular Music Canadian content

Radio stations program a wide variety of popular music radio formats to meet the needs of their listeners. While most popular music formats tend to feature contemporary vocal music, other music formats – such as nostalgia, oldies, adult standards and middle of the road – program "older" popular music styles that may include vocal and instrumental music.

The availability of older Canadian popular music within this group may be limited compared to contemporary music genres. With this in mind, the CRTC provides some flexibility in terms of Canadian content requirements (through either regulation or condition of licence).

What are your reactions to and your thoughts on Canadian content rules? Is this something that is important to you as a Canadian? If so, why is it important? If it's not important, is there a reason why it isn't?

PROBE:

- When you are listening to the radio, are you conscious at all of who you're listening to and whether or not they are Canadian? Does it matter to you as a Canadian listener?
- Are you satisfied with the level of exposure by Canadian artists? Do you want Canadian artists to receive greater exposure on the airwaves? If so, how?

Q8. Given the Federal government's responsibility to consult Indigenous peoples on broadcasting issues and the fact that there are currently no specific rules for Indigenous content on Commercial Radio stations:

- Is it something that is of interest to you? If so, please explain why it is important?

- If it is not important, is there a reason why it isn't?

SECTION 3: FUTURE ROLE OF REGULATION (20 MINUTES)

I'd like to discuss the future of radio regulation in Canada by the CRTC and what your needs and preferences might be. As a reminder, the CRTC regulates and supervises broadcasting and telecommunications in the public interest.

Q9. One area that the CRTC regulates is the ownership of various radio stations. Commercial radio stations are privately owned – how aware are you of who owns the radio stations you listen to? Is this a factor or important for you to know? If yes, why is that? If not, why is it is it not a factor or important?

PROBE:

- Would you have any concerns if there was a greater concentration of ownership in commercial radio stations? That is, if there were fewer overall owners of local commercial radio stations? Please tell me the reason(s) for your response.

Q10. Do you feel there is a role for the CRTC in regulating streaming services (such as Spotify) in a similar manner it does with traditional radio stations? For example, financial contributions towards the Canadian broadcasting system, meeting Canadian content and French-language music quotas?

- What do you think the advantages might be?
- Can you think of any potential drawbacks?

Q11. Could the way you listen to commercial radio be better aligned with how you consume audio content?

FINAL QUESTIONS AND ADVICE (5 MINUTES)

Final Thoughts. Do you have any other comments or something to add on the topic of commercial radio?

THANK and WRAP

DISCUSSION GUIDE FOR NON COMMERCIAL RADIO LISTENERS

FOCUS GROUPS – IN PERSON AND ONLINE/TELECONFERENCE

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MODERATOR WELCOME **(5 MINUTES)**	• Welcome and thank for attending • Overview of the session purpose • Neutrality of Ipsos and importance of honest feedback • Rules of engagement - informed and respectful dialogue • Anonymity of your participation - remarks are not attributed and your privacy will be protected • Video/Audio recording for notetaking purposes; observers in the backroom/on the phone • Technical considerations in using online Ideation Exchange platform (for online groups) • Quick round of intros - first name, location and hobbies (during first question for online groups) • **Note that today's discussion will be focused on commercial radio – that is, AM/FM local stations which are privately owned, and not public radio i.e. CBC and/or ICI Radio-Canada, Indigenous stations, ethnic specialty stations, or college and community stations. We may have a few questions about public stations, but ask that you be mindful of speaking specifically about commercial radio in your feedback unless otherwise specified.** • **We know that you are not currently a listener of Commercial Radio but are nonetheless interested in hearing your point of view.**

Unless otherwise noted, all questions are open-ended.

SECTION 1: RADIO HABITS AND LISTENING (30 MINUTES)

We are here today to have a discussion on **commercial** radio services in Canada.

Q1. I would like to start by understanding your current listening habits when it comes audio content such as music streaming or podcasts.

- When you listen – occasions and frequency
- How and where you listen – in the car, at home, etc.
- What devices you're listening on
- What you're listening to (music, news, talk radio, other)
- ASK IN BILINGUAL / FRENCH MARKETS: Is there a difference in your listening habits whether you are listening to English language content or French language content? Why do you choose to listen to one language or the other – is it programming, personal preference, or something else?

PROBES:

- Are your listening habits different weekday vs. weekend? If so, how?
- What else are you doing when you listen to the radio?

Q2. Why do you listen to audio content such as podcasts and music streaming, but not to the radio? Has this changed or evolved at all over the years?

Q3. What need does listening to audio content fulfill for you? What would you miss most if you didn't have the opportunity to listen to audio content? What would replace it?

PROBE

- Do you have needs that are unfulfilled by listening to commercial radio? Are those needs fulfilled by listening to other audio content? If so, specify those needs.
- Quality, diversity, to discover new artists and music, Canadian content

Q4. Although you said that you are not listening to commercial radio, are there things in it that you think are working? Things that could be improved for it to meet your needs and interests?? I'm going to READ/SHOW you a list and for each, please tell me what's working and/or what's missing for each.

g. For news and talk radio – quality, quantity and a source of information
h. To discover new artists and music via musical programming (interviews, promotion, reports on local and emerging artists)
i. To discover music from the other official language (i.e. in French on English-language station)
j. For diversity of songs, genres and artists
k. For diversity of content reflecting and supporting Indigenous Peoples
l. Quality of programming

Q5. Do any of you listen to CBC Radio? If so, what is the difference CBC Radio and commercial stations in terms of role and meeting your needs as a listener?

MODERATOR TO CHECK WITH BACKROOM FOR QUESTIONS AND FOLLOW-UPS

SECTION 2: CANADIAN CONTENT AND CULTURE (30 MINUTES)

Now I'd like to discuss Canadian Content and its role in our culture.

Q6. IF NOT COVERED IN THE INITIAL DISCUSSION: How much local content are you consuming on commercial radio, especially as it relates to local news and information? Is this important to you as a radio listener?

PROBES:

- What are the most important and relevant sources of local news and information if it's not the radio?
- Are there any gaps in local news and info? Could these be filled by radio?
- Would you feel that something was missing if local news was not available? Where else would you go to get this information?

Q7. Were you aware that there are specific Canadian content rules in Canada (IN-PERSON SHOW OF HANDS / ONLINE CLOSED END POLL). If yes, please tell me in your own words what you believe these might be.

I'm going to show you a set of Canadian content rules that are overseen by the CRTC. The CRTC is an administrative tribunal that regulates and supervises broadcasting and telecommunications in the public interest.

MODERATOR TO PROVIDE THE FOLLOWING HANDOUT ON CANADIAN CONTENT RULES (IN PERSON) OR SHOW (ONLINE)

Canadian content requirements for Popular Music (e.g. pop, rock, dance, country)
Commercial, community, campus and Indigenous radio
English-language and French-language stations must ensure that at least 35% of the Popular Music they broadcast each week is Canadian content.
To ensure that Canadian selections are not relegated to times when relatively small audiences are tuned to radio, such as on weekday evenings and on weekends, English-language and French-language stations must ensure that at least 35% of the Popular Music broadcast between 6:00 a.m. and 6:00 p.m. Monday to Friday is Canadian content.
Canadian content requirements for Special Interest Music (e.g. Folk, Jazz and Blues, International music)
Commercial radio
English-language and French-language commercial radio stations must ensure that at least 10% of all Special Interest Music broadcast is devoted to Canadian selections.
As well, commercial radio stations have to ensure that Special Interest Music selections, including Canadian content, are scheduled in a reasonable manner throughout the broadcast day.
If anyone asks, "Are there any exceptions?" MODERATOR TO READ:
Exceptions to Popular Music Canadian content
Radio stations program a wide variety of popular music radio formats to meet the needs of their listeners. While most popular music formats tend to feature contemporary vocal music, other music formats – such as nostalgia, oldies, adult standards and middle of the road – program "older" popular music styles that may include vocal and instrumental music.
The availability of older Canadian popular music within this group may be limited compared to contemporary music genres. With this in mind, the CRTC provides some flexibility in terms of Canadian content requirements (through either regulation or condition of licence).
Q8. What are your reactions to and your thoughts on Canadian content rules? Is this something that is important to you as a Canadian? If so, why is it important? If it's not important, is there a reason why it isn't?
Q9. When you are listening to the audio content, are you conscious at all of who you're listening to and whether or not they are Canadian? Does it matter to you as a Canadian listener?
Q10. Although Indigenous content is considered Canadian content, we rarely hear Indigenous content on commercial radio stations. Do you think the CRTC should require Commercial stations to play a certain amount of Indigenous music and/or contribute financially to the support of the creation of Indigenous music?

- Is it something that is of interest to you? If so, please explain why it is important?
- If it is not important, is there a reason why it isn't?

PROBE
- Are you satisfied with the level of exposure by Canadian artists? Do you want Canadian artists to receive greater exposure on the airwaves? If so, how?

MODERATOR TO CHECK WITH BACKROOM FOR QUESTIONS AND FOLLOW-UPS

SECTION 3: FUTURE ROLE OF REGULATION (20 MINUTES)

I'd like to discuss the future of radio regulation in Canada by the CRTC and what your needs and preferences might be. As a reminder, the CRTC regulates and supervises broadcasting and telecommunications in the public interest.
Q13. One area that the CRTC regulates is the ownership of various radio stations. Commercial radio stations are privately owned – how aware are you of who owns the radio stations in your

town? Is this a factor or important for you to know? If yes, why is that? If not, why is it is it not a factor or important?

Q14. Would you have any concerns if there was a greater concentration of ownership in commercial radio stations? That is, if there were fewer overall owners of local commercial radio stations? Please tell me the reason(s) for your response.

Q15. The CRTC requires commercial radio stations to play Canadian content and to contribute financially to support the Canadian music industry.

Commercial radio stations have to contribute to the Canadian music industry both financially and through exposure. To that end they have to abide by certain rules established by the CRTC. These rules can take the form of quotas, such as the minimal amount of Canadian content that they must air during a certain period, but also a percentage of revenue they must contribute to the development of this content. Financial contributions are also encouraged for all new licensees or when a station changes ownership. The funds collected from stations are distributed to established Funds that cater to artists, such as Factor or Musicaction, or community radio. Station owners can also decide where they want part of the money to go, following established guidelines. While some of these rules could be difficult to impose on streaming services, others, such as the obligation to contribute a certain percentage of their Canadian revenues to Canadian Funds or initiatives, would be possible.

- Do you think the CRTC should also regulate content on streaming audio services like Spotify and Apple Music?
- Do you think the CRTC should also require streaming audio services to contribute financially to support the Canadian music industry?

MODERATOR TO CHECK WITH BACKROOM FOR QUESTIONS AND FOLLOW-UPS

FINAL QUESTIONS AND ADVICE (5 MINUTES)

Q17. Do you have any other comments or something to add on the topic of commercial radio?

THANK and WRAP