The Infinite Dial 2019
Canada
#InfiniteDial
Study Overview

- The Infinite Dial is the longest-running survey of digital media consumer behaviour in America.
- The Infinite Dial Canada report mirrors the Infinite Dial U.S. reports, which have been undertaken annually since 1998 by Edison Research, and cover a wide range of online digital media topics.
- Infinite Dial Canada, now in its second year, continues to explore the penetration of online digital audio and social media in Canada, as well as the online platforms and technologies that Canadians are using.
- This study is designed to allow for direct comparisons between Canadian and U.S. markets.
Study Methodology

- In the first quarter of 2019, Edison Research conducted a national telephone survey of 1,065 people aged 18 and older, using random digital dialing techniques to both mobile phones and landlines.

- Survey offered in both English and French.

- Data weighted to national 18+ population figures.
Media & Technologies
Device Ownership

TOTAL CANADIAN POPULATION 18+

% OWNING DEVICE

<table>
<thead>
<tr>
<th>Device</th>
<th>2018</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Smartphone</td>
<td>76</td>
<td>82</td>
</tr>
<tr>
<td>Internet-connected TV</td>
<td>54</td>
<td>61</td>
</tr>
<tr>
<td>Tablet</td>
<td>49</td>
<td>52</td>
</tr>
</tbody>
</table>
Smart Speaker Awareness

TOTAL CANADIAN POPULATION 18+
% AWARE OF SMART SPEAKER BRAND

- **Amazon Alexa**: 46% (2018), 47% (2019)
- **Google Home**: 54% (2018), 57% (2019)
- **Apple HomePod**: 34% (2018)
- **Sonos One with Alexa**: 30% (2018)
- **Harmon/Kardon Invoke**: 16% (2018)
- **Heard of any of the above**: 65% (2019)
Smart Speaker Ownership

TOTAL CANADIAN POPULATION 18+
% OWNING SMART SPEAKER

- Amazon Alexa: 3% (2018), 9% (2019)
- Apple HomePod: 4%
- Sonos One with Alexa: 3%
- Harmon/Kardon Invoke: <1%

Own any of the above: 26%
Number of Smart Speakers in Household

BASE: CANADIAN AGE 18+ SMART SPEAKER OWNERS

2018

ONE

TWO

THREE OR MORE

MEAN # OF SMART SPEAKERS

76

15

9

1.0

BASE: CANADIAN AGE 18+ SMART SPEAKER OWNERS
Number of Smart Speakers in Household

BASE: CANADIAN AGE 18+ SMART SPEAKER OWNERS

<table>
<thead>
<tr>
<th>Year</th>
<th>One</th>
<th>Two</th>
<th>Three or More</th>
<th>Mean # of Smart Speakers</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018</td>
<td>76</td>
<td>15</td>
<td>9</td>
<td>1.0</td>
</tr>
<tr>
<td>2019</td>
<td>29</td>
<td>43</td>
<td>28</td>
<td>2.1</td>
</tr>
</tbody>
</table>
Listening to AM/FM Radio in the Last Week

TOTAL CANADIAN POPULATION 18+

% LISTENED TO AM/FM RADIO IN LAST WEEK

AM/FM RADIO = LISTENING TO "OVER-THE-AIR" AM/FM RADIO AND/OR AM/FM RADIO STATIONS ONLINE

2018: 67
2019: 65
Online Audio
Listening to AM/FM Radio Online in Last Month

TOTAL CANADIAN POPULATION 18+
% LISTENED TO AM/FM RADIO ONLINE IN LAST MONTH

22
2018

22
2019
Listening to AM/FM Radio Online in Last Week

TOTAL CANADIAN POPULATION 18+
% LISTENED TO AM/FM RADIO ONLINE IN LAST WEEK

2018: 14%
2019: 17%
Listening to Internet-Only Audio in Last Month

TOTAL CANADIAN POPULATION 18+
% LISTENED TO INTERNET-ONLY AUDIO IN LAST MONTH

- 2018: 27%
- 2019: 32%
Listening to Internet-Only Audio in Last Week

TOTAL CANADIAN POPULATION 18+
% LISTENED TO INTERNET-ONLY AUDIO IN LAST WEEK

2018: 22%
2019: 26%
Listening to Internet-Only Audio in Last 24 Hours

TOTAL CANADIAN POPULATION 18+

% LISTENED TO INTERNET-ONLY AUDIO IN LAST 24 HOURS

2018: 14%
2019: 17%
Monthly Online Audio Listening

TOTAL CANADIAN POPULATION 18+

% LISTENED TO ONLINE AUDIO IN LAST MONTH

ONLINE AUDIO = LISTENING TO AM/FM RADIO STATIONS ONLINE AND/OR LISTENING TO STREAMED AUDIO CONTENT AVAILABLE ONLY ON THE INTERNET

2018: 57%
2019: 59%
Weekly Online Audio Listening

TOTAL CANADIAN POPULATION 18+

% LISTENED TO ONLINE AUDIO IN LAST WEEK

ONLINE AUDIO = LISTENING TO AM/FM RADIO STATIONS ONLINE AND/OR LISTENING TO STREAMED AUDIO CONTENT AVAILABLE ONLY ON THE INTERNET

2018: 49
2019: 51
Audio Brand Awareness

TOTAL CANADIAN POPULATION 18+

% AWARE OF AUDIO BRAND

Google Play Music | 56/65
Apple Music | 62/64
Spotify | 64/64
CBC Music | 35/48
Amazon Music | 42/46
RadioPlayer Canada | 17/44
iHeartRadio | 43/41
SoundCloud | 37/38

Yahoo Music | 23/35
Stingray | 33/31
TuneIn | 13/20
Deezer | 7/20
8Tracks | 9/16
eMusic | 6/16
Slacker | 9/12
Last.fm | 8/10
Tidal | 7/9

2018 2019
## Monthly Online Audio Listening

**TOTAL CANADIAN POPULATION 18+**

**% LISTENED TO ONLINE AUDIO BRAND IN LAST MONTH**

<table>
<thead>
<tr>
<th>Brand</th>
<th>2018</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spotify</td>
<td>19</td>
<td>27</td>
</tr>
<tr>
<td>Apple Music</td>
<td>11</td>
<td>20</td>
</tr>
<tr>
<td>Google Play Music</td>
<td>11</td>
<td>15</td>
</tr>
<tr>
<td>CBC Music</td>
<td>6</td>
<td>10</td>
</tr>
<tr>
<td>Stingray</td>
<td>7</td>
<td>12</td>
</tr>
<tr>
<td>iHeartRadio</td>
<td>3</td>
<td>7</td>
</tr>
<tr>
<td>RadioPlayer Canada</td>
<td>2</td>
<td>6</td>
</tr>
<tr>
<td>SoundCloud</td>
<td>5</td>
<td>8</td>
</tr>
<tr>
<td>Amazon Music</td>
<td>2</td>
<td>3</td>
</tr>
</tbody>
</table>
Weekly Online Audio Listening

TOTAL CANADIAN POPULATION 18+
% LISTENED TO ONLINE AUDIO BRAND IN LAST WEEK

- Spotify: 16% (2018), 23% (2019)
- Apple Music: 9% (2018), 17% (2019)
- CBC Music: 3% (2018), 9% (2019)
- Stingray: 7% (2018), 5% (2019)
- iHeartRadio: 2% (2018), 5% (2019)
- RadioPlayer Canada: 4% (2018), 4% (2019)
- SoundCloud: 4% (2018), 3% (2019)
Audio Brand Used Most Often

BASE: CANADIAN 18+ AND CURRENTLY EVER USE ANY AUDIO BRAND

<table>
<thead>
<tr>
<th>Brand</th>
<th>2018</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>SPOTIFY</td>
<td>26</td>
<td>32</td>
</tr>
<tr>
<td>APPLE MUSIC</td>
<td>16</td>
<td>25</td>
</tr>
<tr>
<td>GOOGLE PLAY</td>
<td>14</td>
<td>16</td>
</tr>
<tr>
<td>STINGRAY</td>
<td>14</td>
<td>5</td>
</tr>
<tr>
<td>CBC MUSIC</td>
<td>8</td>
<td>8</td>
</tr>
<tr>
<td>OTHER</td>
<td>22</td>
<td>14</td>
</tr>
</tbody>
</table>

#AudioBrand #InfiniteDial
Weekly YouTube Music Usage in Canada

TOTAL CANADIAN POPULATION 18+
% USED YOUTUBE FOR MUSIC OR MUSIC VIDEOS IN LAST WEEK

2018: 46%
2019: 47%
What is Time Spent with Online Audio Replacing?

BASE: CANADIAN 18+ WHO HAVE EVER LISTENED TO ONLINE AUDIO

<table>
<thead>
<tr>
<th></th>
<th>2018</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>OVER-THE-AIR AM/FM RADIO</td>
<td>35</td>
<td>37</td>
</tr>
<tr>
<td>OWNED MUSIC</td>
<td>24</td>
<td>34</td>
</tr>
<tr>
<td>NEW TIME; NOT TAKEN FROM OTHER SOURCES</td>
<td>39</td>
<td>24</td>
</tr>
<tr>
<td>SIRIUSXM</td>
<td>2</td>
<td>5</td>
</tr>
</tbody>
</table>

OVER-THE-AIR AM/FM RADIO
OWNED MUSIC
NEW TIME; NOT TAKEN FROM OTHER SOURCES
SIRIUSXM
OTHER

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THE INFINITE DIAL 2019

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edison research
TRITON

What is Time Spent with Online Audio Replacing?

BASE: CANADIAN 18+ WHO HAVE EVER LISTENED TO ONLINE AUDIO

<table>
<thead>
<tr>
<th></th>
<th>2018</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>OVER-THE-AIR AM/FM RADIO</td>
<td>35</td>
<td>37</td>
</tr>
<tr>
<td>OWNED MUSIC</td>
<td>24</td>
<td>34</td>
</tr>
<tr>
<td>NEW TIME; NOT TAKEN FROM OTHER SOURCES</td>
<td>39</td>
<td>24</td>
</tr>
<tr>
<td>SIRIUSXM</td>
<td>2</td>
<td>5</td>
</tr>
</tbody>
</table>

OVER-THE-AIR AM/FM RADIO
OWNED MUSIC
NEW TIME; NOT TAKEN FROM OTHER SOURCES
SIRIUSXM
OTHER

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THE INFINITE DIAL 2019

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In-Car Audio
Audio Sources Used in Car

BASE: CANADIAN 18+ AND HAS DRIVEN/RIDDEN IN CAR IN LAST MONTH; 85%

% USING AUDIO SOURCE IN CAR

- Podcasts: 22% (2018), 25% (2019)
- SiriusXM: 12% (2018), 14% (2019)
- Online Radio: 11% (2018), 14% (2019)
Audio Source Used Most Often in Car

BASE: CANADIAN 18+, DRIVEN/RIDDEN IN CAR IN LAST MONTH, AND USE ANY AUDIO SOURCE IN CAR

<table>
<thead>
<tr>
<th>Year</th>
<th>AM/FM Radio</th>
<th>SiriusXM</th>
<th>Online Audio</th>
<th>Podcasts</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018</td>
<td>81</td>
<td>8</td>
<td>5</td>
<td>4</td>
<td>2</td>
</tr>
<tr>
<td>2019</td>
<td>79</td>
<td>7</td>
<td>11</td>
<td>3</td>
<td></td>
</tr>
</tbody>
</table>
In-Dash Information and Entertainment Systems

BASE: CANADIAN 18+ AND HAS DRIVEN/RIDDEN IN CAR IN LAST MONTH; 85%

% OWNING IN-DASH INFORMATION AND ENTERTAINMENT SYSTEM IN CAR

- 2018: 10%
- 2019: 18%
Podcasting
Podcasting Familiarity

TOTAL CANADIAN POPULATION 18+
% FAMILIAR WITH THE TERM “PODCASTING”

2018: 61%
2019: 63%
Monthly Podcast Listening

TOTAL CANADIAN POPULATION 18+
% LISTENED TO A PODCAST IN LAST MONTH

2018: 28%
2019: 36%
Monthly Podcast Listening

CANADIAN POPULATION

% LISTENED TO A PODCAST IN LAST MONTH

<table>
<thead>
<tr>
<th></th>
<th>2018</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Men</td>
<td>31</td>
<td>37</td>
</tr>
<tr>
<td>Women</td>
<td>26</td>
<td>35</td>
</tr>
</tbody>
</table>
Monthly Podcast Listening

CANADIAN POPULATION

% LISTENED TO A PODCAST IN LAST MONTH

2018 vs 2019

Age 18-34
- 2018: 41%
- 2019: 43%

Age 35-54
- 2018: 29%
- 2019: 45%

Age 55+
- 2018: 19%
- 2019: 21%
Weekly Podcast Listening

TOTAL CANADIAN POPULATION 18+
% LISTENED TO A PODCAST IN LAST WEEK

2018: 19
2019: 23
Weekly Podcast Listening

Canadian Population

% Listened to a Podcast in Last Week

<table>
<thead>
<tr>
<th>2018</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Men</td>
<td>20</td>
</tr>
<tr>
<td>Women</td>
<td>18</td>
</tr>
</tbody>
</table>
Weekly Podcast Listening

CANADIAN POPULATION

% LISTENED TO A PODCAST IN LAST WEEK

- **Age 18-34**
  - 2018: 27
  - 2019: 29

- **Age 35-54**
  - 2018: 18
  - 2019: 31

- **Age 55+**
  - 2018: 13
  - 2019: 13

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Number of Podcasts Listened to in Last Week

BASE: CANADIAN 18+ AND LISTENED TO PODCAST IN LAST WEEK

Canadian weekly podcast listeners averaged **five podcasts** in the last week.
## Device Used Most Often to Listen to Podcasts

**Base: Canadian 18+ and Ever Listened to a Podcast**

<table>
<thead>
<tr>
<th>Year</th>
<th>Computer</th>
<th>Smartphone/Tablet/Portable Device</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018</td>
<td>41</td>
<td>59</td>
</tr>
<tr>
<td>2019</td>
<td>25</td>
<td>75</td>
</tr>
</tbody>
</table>
### Podcast Listening Locations

**BASE: CANADIAN 18+ AND EVER LISTENED TO A PODCAST**

% LISTENED TO A PODCAST IN LOCATION

<table>
<thead>
<tr>
<th>Location</th>
<th>2018</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>At home</td>
<td>80</td>
<td>91</td>
</tr>
<tr>
<td>In a car/truck</td>
<td>29</td>
<td>35</td>
</tr>
<tr>
<td>At work</td>
<td>24</td>
<td>29</td>
</tr>
<tr>
<td>While walking around/on foot</td>
<td>24</td>
<td>23</td>
</tr>
<tr>
<td>While riding public transportation</td>
<td>19</td>
<td>16</td>
</tr>
<tr>
<td>At a gym/while working out</td>
<td>14</td>
<td>15</td>
</tr>
</tbody>
</table>
Listening to Podcasts from Public Radio Producers

BASE: CANADIAN 18+ AND EVER LISTENED TO A PODCAST

% LISTENED TO PODCASTS FROM PUBLIC RADIO PRODUCERS

2018: 42%
2019: 46%
Increasing Podcast Playback Speed

BASE: CANADIAN 18+ AND EVER LISTENED TO A PODCAST

% WHO INCREASE SPEED OF PODCASTS

“Do you ever increase the speed of your podcasts in order to listen to them faster?”

2018: 9
2019: 27
Amount of Podcast Episode Listened to

BASE: CANADIAN 18+ AND EVER LISTENED TO A PODCAST

"Think about the audio podcast episodes you listen to. Do you typically listen to...?"

- The entire podcast: 36%
- Most of the podcast: 45%
- Less than half the podcast: 11%
- Just the beginning of podcast: 2%
- Don't Know: 6%
Amount of Podcast Episode Listened to

BASE: CANADIAN 18+ AND DOWNLOADED PODCASTS TO LISTEN TO AT A LATER TIME;

“What percent of all the podcast you download would you say you typically listen to?”

- 75% to 100%: 56%
- 51% to 75%: 23%
- 26% to 50%: 15%
- 1% to 25%: 6%
Observations

- Smart Speaker ownership is surging in Canada
- Online Audio continues to grow, and is settling around several key brands
Observations

‣ In-dash entertainment systems are continuing to become more popular

‣ More than a third of Canadians 18+ listened to a podcast in the last month