Study Overview

- The Infinite Dial is the longest-running survey of digital media consumer behaviour in America.
- This inaugural 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 explores the penetration of online digital audio in Canada and the online platforms and technologies that Canadians are using.
In January/February 2018, Edison Research conducted a national telephone survey of 1000 people aged 18 and older, using random digit dialing techniques to both cell phones and landlines.

- Survey offered in both English and French languages
- Data weighted to national 18+ population figures
MEDIA & TECHNOLOGIES
Device Ownership in Canada

Base: Total Population 18+

<table>
<thead>
<tr>
<th>Device</th>
<th>% owning device</th>
</tr>
</thead>
<tbody>
<tr>
<td>Smartphone</td>
<td>76%</td>
</tr>
<tr>
<td>Internet-connected TV</td>
<td>54%</td>
</tr>
<tr>
<td>Tablet</td>
<td>49%</td>
</tr>
</tbody>
</table>
Smartphone Ownership in Canada

- Total 18+: 76%
- Age 18-34: 97%
- Age 35-54: 86%
- Age 55+: 52%
Smartphone Ownership

Base: Total Population 18+

% owning a smartphone

- U.S. 2009: 9%
- U.S. '10: 14%
- U.S. '11: 30%
- U.S. '12: 43%
- U.S. '13: 52%
- U.S. '14: 59%
- U.S. '15: 69%
- U.S. '16: 74%
- U.S. '17: 79%
- U.S. 2018: 82%
- Canada 2018: 76%
Tablet Ownership in Canada

% owning a tablet

- Total 18+: 49%
- Age 18-34: 46%
- Age 35-54: 62%
- Age 55+: 40%
Smart Speaker Awareness in Canada

Base: Total Population 18+

- % aware of Smart Speaker
  - Google Home: 54%
  - Amazon Alexa: 46%
Smart Speaker Awareness

Base: Total Population 18+

% aware of Smart Speaker

- Google Home:
  - Canada 2018: 54%
  - U.S. 2018: 56%

- Amazon Alexa:
  - Canada 2018: 46%
  - U.S. 2018: 70%
Smart Speaker Ownership in Canada

% owning a Smart Speaker

- Total 18+: 8%
- Age 18-34: 10%
- Age 35-54: 11%
- Age 55+: 4%
Smart Speaker Ownership

Base: Total Population 18+

% owning a Smart Speaker

7%  U.S. 2017
17% U.S. 2018
8%  Canada 2018
Smart Speaker Ownership in Canada

Base: Own a Smart Speaker; n=82

- Own Amazon Alexa but not Google Home: 30%
- Own both Amazon Alexa and Google Home: 7%
- Own Google Home but not Amazon Alexa: 63%
Number of Radios Owned in Homes in Canada

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Zero</th>
<th>One to Three</th>
<th>Four or more</th>
<th>Mean # of Radios</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total 18+</td>
<td>29%</td>
<td>63%</td>
<td>8%</td>
<td>1.6</td>
</tr>
<tr>
<td>Age 18-34</td>
<td>51%</td>
<td>46%</td>
<td>3%</td>
<td>1.0</td>
</tr>
<tr>
<td>Age 35-54</td>
<td>30%</td>
<td>60%</td>
<td>10%</td>
<td>1.6</td>
</tr>
<tr>
<td>Age 55+</td>
<td>11%</td>
<td>78%</td>
<td>11%</td>
<td>1.9</td>
</tr>
</tbody>
</table>
Number of Radios Owned in Home

Base: Total Population 18+

Canada 2018
- Zero: 29%
- One to Three: 63%
- Four or more: 8%
- Mean # of Radios: 1.6

U.S. 2018
- Zero: 29%
- One to Three: 60%
- Four or more: 11%
- Mean # of Radios: 1.7
Monthly Online Audio Listening in Canada

% listening to Online Audio in last month

- Total 18+: 57%
- Age 18-34: 73%
- Age 35-54: 63%
- Age 55+: 41%

Online Audio = Listening to AM/FM radio stations online and/or listening to streamed audio content available only on the Internet
Monthly Online Audio Listening

Base: Total Population 18+

% listening to Online Audio in last month

- U.S. 2009: 26%
- U.S. '10: 26%
- U.S. '11: 33%
- U.S. '12: 36%
- U.S. '13: 43%
- U.S. '14: 43%
- U.S. '15: 51%
- U.S. '16: 55%
- U.S. '17: 59%
- U.S. 2018: 61%
- Canada 2018: 57%

Online Audio = Listening to AM/FM radio stations online and/or listening to streamed audio content available only on the Internet
Weekly Online Audio Listening in Canada

% listening to Online Audio in last week

<table>
<thead>
<tr>
<th>Age Group</th>
<th>% Listening</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total 18+</td>
<td>49%</td>
</tr>
<tr>
<td>Age 18-34</td>
<td>64%</td>
</tr>
<tr>
<td>Age 35-54</td>
<td>55%</td>
</tr>
<tr>
<td>Age 55+</td>
<td>31%</td>
</tr>
</tbody>
</table>

Online Audio = Listening to AM/FM radio stations online and/or listening to streamed audio content available only on the Internet
Weekly Online Audio Listening

Base: Total Population 18+

<table>
<thead>
<tr>
<th>Year</th>
<th>% Listening to Online Audio in last week</th>
</tr>
</thead>
<tbody>
<tr>
<td>U.S. 2009</td>
<td>16%</td>
</tr>
<tr>
<td>U.S. '10</td>
<td>17%</td>
</tr>
<tr>
<td>U.S. '11</td>
<td>21%</td>
</tr>
<tr>
<td>U.S. '12</td>
<td>27%</td>
</tr>
<tr>
<td>U.S. '13</td>
<td>31%</td>
</tr>
<tr>
<td>U.S. '14</td>
<td>32%</td>
</tr>
<tr>
<td>U.S. '15</td>
<td>41%</td>
</tr>
<tr>
<td>U.S. '16</td>
<td>47%</td>
</tr>
<tr>
<td>U.S. '17</td>
<td>50%</td>
</tr>
<tr>
<td>U.S. 2018</td>
<td>55%</td>
</tr>
<tr>
<td>Canada 2018</td>
<td>49%</td>
</tr>
</tbody>
</table>

Online Audio = Listening to AM/FM radio stations online and/or listening to streamed audio content available only on the Internet
## Audio Brand Awareness in Canada

**Base: Total Population 18+**

<table>
<thead>
<tr>
<th>Brand</th>
<th>% Aware of Audio Brand</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spotify</td>
<td>64%</td>
</tr>
<tr>
<td>Apple Music*</td>
<td>62%</td>
</tr>
<tr>
<td>Google Play Music</td>
<td>58%</td>
</tr>
<tr>
<td>iHeartRadio</td>
<td>43%</td>
</tr>
<tr>
<td>Amazon Music</td>
<td>42%</td>
</tr>
<tr>
<td>SoundCloud</td>
<td>37%</td>
</tr>
<tr>
<td>CBC Music</td>
<td>35%</td>
</tr>
<tr>
<td>Stingray</td>
<td>33%</td>
</tr>
<tr>
<td>Yahoo Music</td>
<td>23%</td>
</tr>
<tr>
<td>Radioplayer Canada</td>
<td>17%</td>
</tr>
<tr>
<td>TuneIn</td>
<td>13%</td>
</tr>
<tr>
<td>8tracks</td>
<td>9%</td>
</tr>
<tr>
<td>Slacker</td>
<td>9%</td>
</tr>
<tr>
<td>Last.fm</td>
<td>8%</td>
</tr>
<tr>
<td>Deezer</td>
<td>7%</td>
</tr>
<tr>
<td>Tidal</td>
<td>7%</td>
</tr>
<tr>
<td>eMusic</td>
<td>6%</td>
</tr>
</tbody>
</table>

*Asked as Apple Music, the paid music subscription from Apple*
Audio Brand Awareness in Canada

Base: Total Population 18+

% aware of audio brand

- Spotify: 64% (Canada), 62% (U.S.)
- Apple Music*: 62% (Canada), 58% (U.S.)
- Google Play Music: 58% (Canada), 58% (U.S.)
- iHeartRadio: 43% (Canada), 66% (U.S.)
- Amazon Music: 42% (Canada), 60% (U.S.)
- SoundCloud: 37% (Canada), 33% (U.S.)
- TuneIn: 13% (Canada), 16% (U.S.)
- 8tracks: 9% (Canada), 11% (U.S.)
- Slacker: 9% (Canada), 19% (U.S.)
- Deezer: 7% (Canada), 7% (U.S.)
- Tidal: 7% (Canada), 10% (U.S.)

*Asked as Apple Music, the paid music subscription from Apple
Monthly Online Audio Listening in Canada

Base: Total Population 18+

% listened to audio brand in last month

- Spotify: 19%
- Stingray: 12%
- Apple Music*: 11%
- Google Play Music: 11%
- SoundCloud: 8%
- CBC Music: 6%
- TuneIn: 4%

Brands lower than 4% not shown

*Asked as Apple Music, the paid music subscription from Apple
Monthly Online Audio Listening

Base: Total Population 18+

% listened to audio brand in last month

- Spotify
  - Canada 2018: 19%
  - U.S. 2018: 17%
- Apple Music*
  - Canada 2018: 11%
  - U.S. 2018: 10%
- Google Play Music
  - Canada 2018: 6%
  - U.S. 2018: 11%
- SoundCloud
  - Canada 2018: 8%
  - U.S. 2018: 7%
- iHeartRadio
  - Canada 2018: 3%
  - U.S. 2018: 11%

*Asked as Apple Music, the paid music subscription from Apple
Weekly Online Audio Listening in Canada

Base: Total Population 18+

% listened to audio brand in last week

- Spotify: 16%
- Apple Music*: 9%
- Stingray: 7%
- Google Play Music: 7%
- SoundCloud: 4%

*Asked as Apple Music, the paid music subscription from Apple
Weekly Online Audio Listening

% listened to audio brand in last week

- **Spotify**: 16% (Canada 2018), 14% (U.S. 2018)
- **Apple Music**: 9% (Canada 2018), 9% (U.S. 2018)
- **Google Play Music**: 7% (Canada 2018), 4% (U.S. 2018)
- **SoundCloud**: 4% (Canada 2018), 5% (U.S. 2018)

*Asked as Apple Music, the paid music subscription from Apple
Audio Brand Used Most Often in Canada

Base: Currently ever use any audio brand

- Apple Music: 16%
- Spotify: 26%
- Stingray: 14%
- Google Play: 14%
- CBC Music: 8%
- SoundCloud: 6%
- Others: 16%
Weekly YouTube Music Usage

“Have you used YouTube to watch music videos or listen to music in the last week?”

Base: Total Population 18+

% used YouTube for music in last week

- U.S. 2014: 29%
- U.S. '15: 38%
- U.S. '16: 40%
- U.S. '17: 40%
- U.S. 2018: 44%
- Canada 2018: 46%
Audio Sources Used in Car in Canada

Base: Age 18+ and has driven/ridden in car in last month; 83%

% currently ever using audio source in car

- AM/FM Radio: 83%
- CD Player: 49%
- Owned Digital Music: 40%
- Podcasts: 22%
- Satellite Radio: 12%
- Online Radio: 11%
Audio Sources Used in Car

% currently ever using audio source in car

- **AM/FM Radio**
  - Canada 2018: 83%
  - U.S. 2018: 82%

- **CD Player**
  - Canada 2018: 49%
  - U.S. 2018: 49%

- **Owned Digital Music**
  - Canada 2018: 40%
  - U.S. 2018: 45%

- **Podcasts**
  - Canada 2018: 22%
  - U.S. 2018: 23%

- **Satellite Radio**
  - Canada 2018: 12%
  - U.S. 2018: 21%

- **Online Radio**
  - Canada 2018: 11%
  - U.S. 2018: 28%

Base: Age 18+ and has driven/ridden in car in last month
Audio Source Used Most Often in Car

Base: Age 18+, has driven/ridden in car in last month, and use any audio source in car

2018 Canada
- AM/FM Radio: 63%
- CDs/Own music collection: 22%
- Satellite Radio: 6%
- Online Radio: 4%
- Other: 3%

2018 U.S.
- AM/FM Radio: 56%
- CDs/Own music collection: 15%
- Satellite Radio: 13%
- Online Radio: 12%
- Other: 3%
In-Dash Information and Entertainment Systems

Base: Age 18+ and has driven/ridden in car in last month

% have an in-dash system in car

- U.S. 2013: 6%
- U.S. 2014: 8%
- U.S. 2015: 10%
- U.S. 2016: 12%
- U.S. 2017: 12%
- U.S. 2018: 15%
- Canada 2018: 10%
PODCASTING
Familiar with the term “Podcasting” in Canada

<table>
<thead>
<tr>
<th>Age Group</th>
<th>% Familiar with Podcasting</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total 18+</td>
<td>61%</td>
</tr>
<tr>
<td>Age 18-34</td>
<td>63%</td>
</tr>
<tr>
<td>Age 35-54</td>
<td>70%</td>
</tr>
<tr>
<td>Age 55+</td>
<td>50%</td>
</tr>
</tbody>
</table>
Familiar with the term “Podcasting”

Base: Total Population 18+

% familiar with the term podcasting

<table>
<thead>
<tr>
<th>Year</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>U.S. 2009</td>
<td>42%</td>
</tr>
<tr>
<td>U.S. '10</td>
<td>45%</td>
</tr>
<tr>
<td>U.S. '11</td>
<td>44%</td>
</tr>
<tr>
<td>U.S. '12</td>
<td>46%</td>
</tr>
<tr>
<td>U.S. '13</td>
<td>46%</td>
</tr>
<tr>
<td>U.S. '14</td>
<td>48%</td>
</tr>
<tr>
<td>U.S. '15</td>
<td>48%</td>
</tr>
<tr>
<td>U.S. '16</td>
<td>55%</td>
</tr>
<tr>
<td>U.S. '17</td>
<td>59%</td>
</tr>
<tr>
<td>U.S. 2018</td>
<td>64%</td>
</tr>
<tr>
<td>Canada 2018</td>
<td>61%</td>
</tr>
</tbody>
</table>

TRITON
Monthly Podcast Listening in Canada

% listened to a podcast in the last month

- Total 18+: 28%
- Age 18-34: 41%
- Age 35-54: 29%
- Age 55+: 19%
Monthly Podcast Listening

Base: Total Population 18+

% listened to a podcast in the last month

<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>%</td>
<td>11%</td>
<td>13%</td>
<td>12%</td>
<td>14%</td>
<td>12%</td>
<td>14%</td>
<td>16%</td>
<td>20%</td>
<td>24%</td>
<td>25%</td>
<td>28%</td>
</tr>
</tbody>
</table>
Monthly Podcast Listening

% listened to a podcast in the last month

Base: Total Population 18+

- Men:
  - U.S. 2018: 27%
  - Canada 2018: 31%

- Women:
  - U.S. 2018: 23%
  - Canada 2018: 26%
Weekly Podcast Listening in Canada

% listened to a podcast in the last week

- Total 18+: 19%
- Age 18-34: 27%
- Age 35-54: 18%
- Age 55+: 13%
Weekly Podcast Listening

% listened to a podcast in the last week

Base: Total Population 18+

- U.S. 2013: 7%
- U.S. '14: 8%
- U.S. '15: 9%
- U.S. '16: 13%
- U.S. '17: 16%
- U.S. 2018: 17%
- Canada 2018: 19%
Number of Podcasts Listened to in Last Week in Canada

Base: Weekly Podcast Listeners

- Three (20%)
- Two (22%)
- One (18%)
- Six to Ten (12%)
- Four or Five (19%)
- 11 or more (9%)

Average of five podcasts listened in last week
Device Used Most Often to Listen to Podcasts

Base: Ever Listened to a Podcast

<table>
<thead>
<tr>
<th></th>
<th>Computer</th>
<th>Smartphone/tablet/portable device</th>
<th>Don't Know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Canada 2018</td>
<td>40%</td>
<td>57%</td>
<td></td>
</tr>
<tr>
<td>U.S. 2018</td>
<td>29%</td>
<td>68%</td>
<td></td>
</tr>
</tbody>
</table>

edison
TRITON
Location Listened to Podcasts Most Often

Base: Ever Listened to a Podcast

U.S. 18+
- In car/truck: 22%
- At work: 11%
- Riding public transportation: 4%
- Walking around: 3%
- Other: 11%
- At home: 49%

Canada 18+
- In car/truck: 12%
- At work: 12%
- Riding public transportation: 4%
- Walking around: 4%
- Other: 7%
- At home: 61%
Podcasting Listening in Canada

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

Base: Ever Listened to a Podcast

- The entire podcast episode: 47%
- Most of the podcast: 35%
- Less than half the podcast: 9%
- Just the beginning of the podcast: 5%
- Don’t Know: 4%
Podcasting Listening

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

Base: Ever Listened to a Podcast

<table>
<thead>
<tr>
<th></th>
<th>The entire podcast episode</th>
<th>Most of the podcast episode</th>
<th>Less than half of episode</th>
<th>Just the beginning</th>
<th>Don’t Know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Canada 2018</td>
<td>47%</td>
<td>35%</td>
<td>9%</td>
<td>5%</td>
<td></td>
</tr>
<tr>
<td>U.S. 2018</td>
<td>37%</td>
<td>44%</td>
<td>11%</td>
<td>5%</td>
<td></td>
</tr>
</tbody>
</table>
Podcast Listening Speed in Canada

Base: Ever Listened to a Podcast

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

Yes 9%
No 91%
Podcast Listening Speed

Base: 18+ and Ever Listened to a Podcast

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

% saying yes

18%  U.S. 2018

9%  Canada 2018
Questions? Comments?

Watch for *The Podcast Consumer 2018*

April 19th
2 p.m. Eastern