



The Infinite Dial 2020 Canada

#InfiniteDial



#InfiniteDial

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Study Overview

- ▶ The Infinite Dial is the longest-running survey of digital media consumer behavior 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 continues to explore the penetration of online digital audio 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

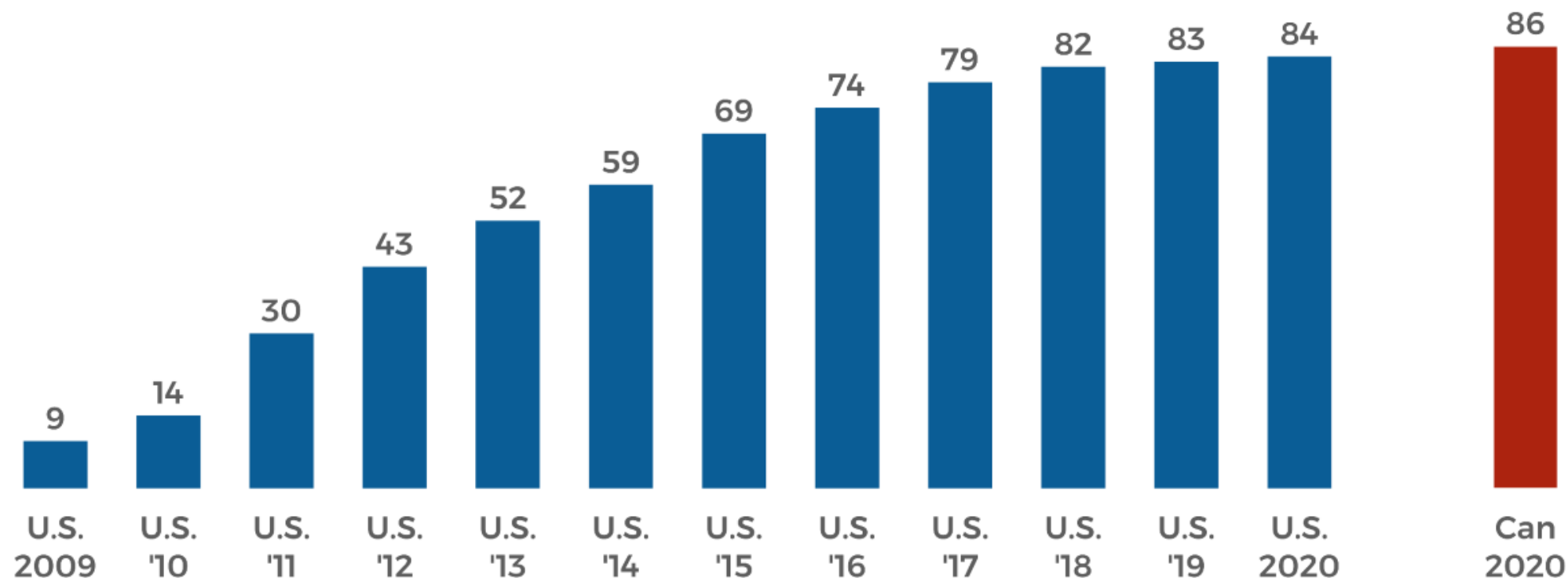
- ▶ In the first quarter of 2020, Edison Research conducted a national telephone survey of 1,076 people aged 18 and older, using random digital dialing techniques to both mobile phones and landlines
- ▶ Survey offered in both English and French
- ▶ Data weighted to national 18+ population figures

Media & Technologies

Smartphone Ownership

TOTAL POPULATIONS 18+

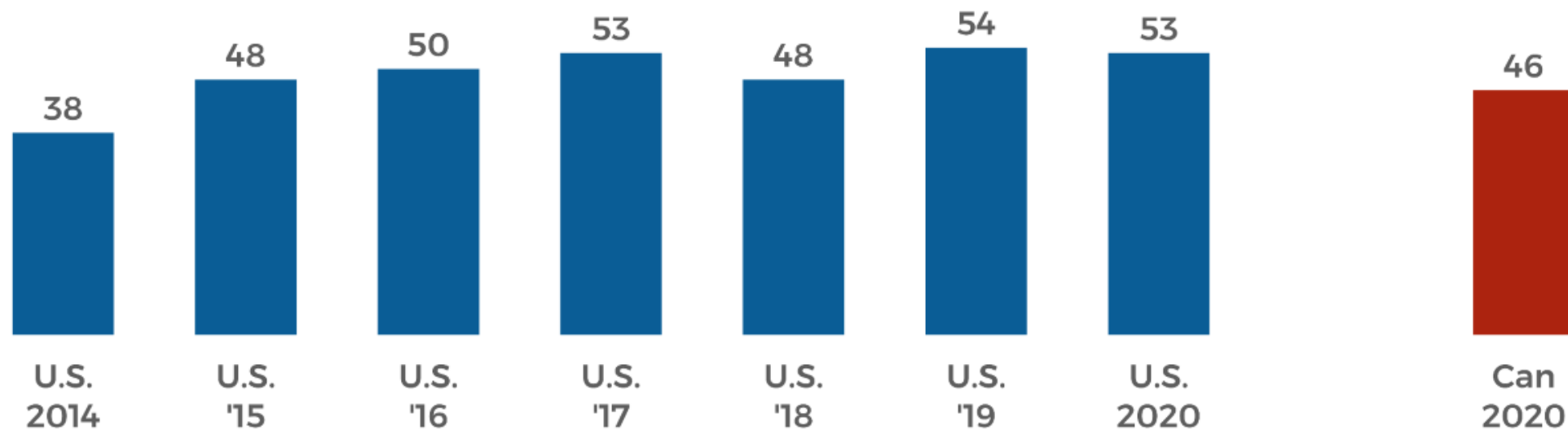
% OWNING A SMARTPHONE



Tablet Ownership

TOTAL POPULATIONS 18+

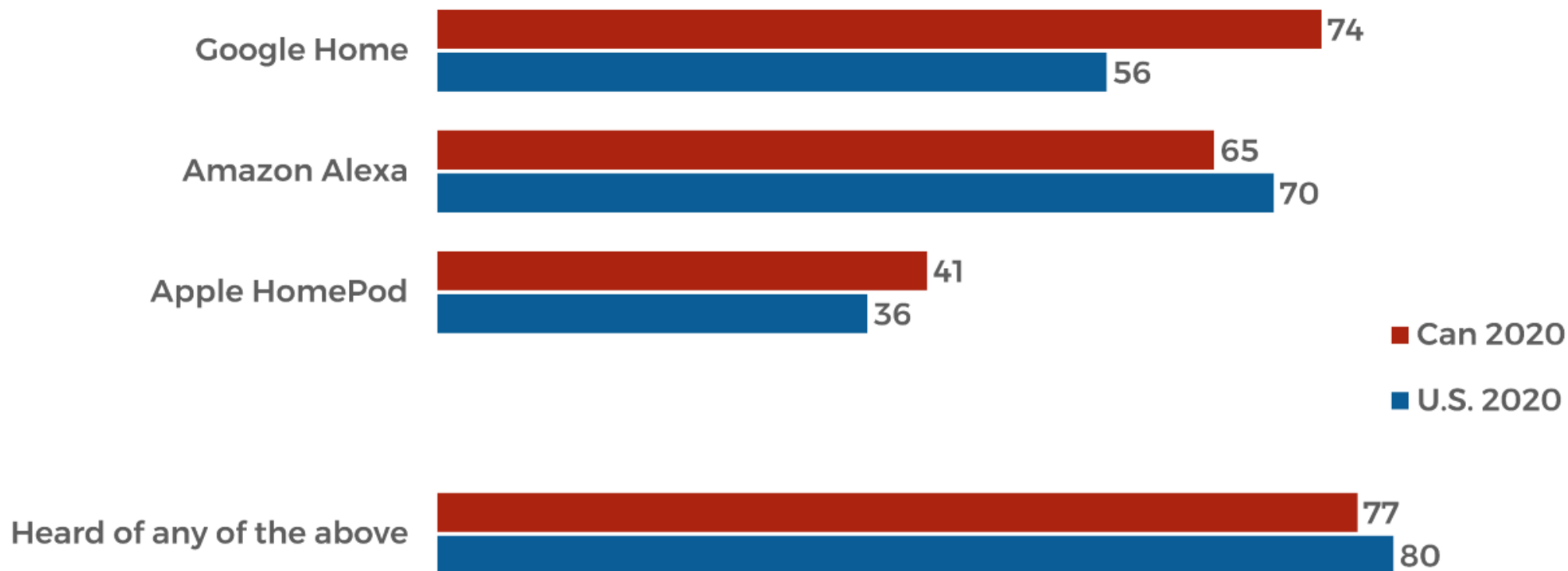
% OWNING A TABLET



Smart Speaker Awareness

TOTAL POPULATIONS 18+

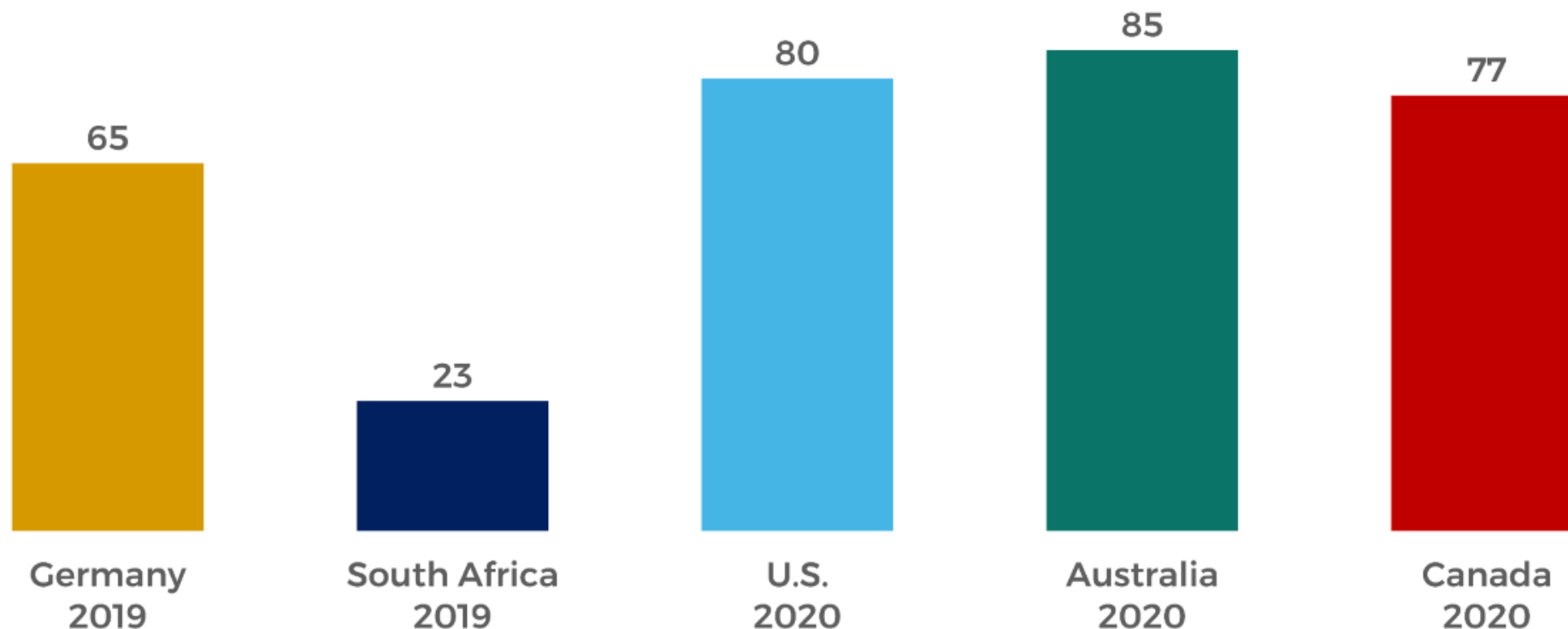
% AWARE OF SMART SPEAKER BRAND



Smart Speaker Awareness

GERMANY, SOUTH AFRICA MAJOR METRO COMMERCIAL, U.S., AUSTRALIA, AND CANADA POPULATIONS AGE 18+

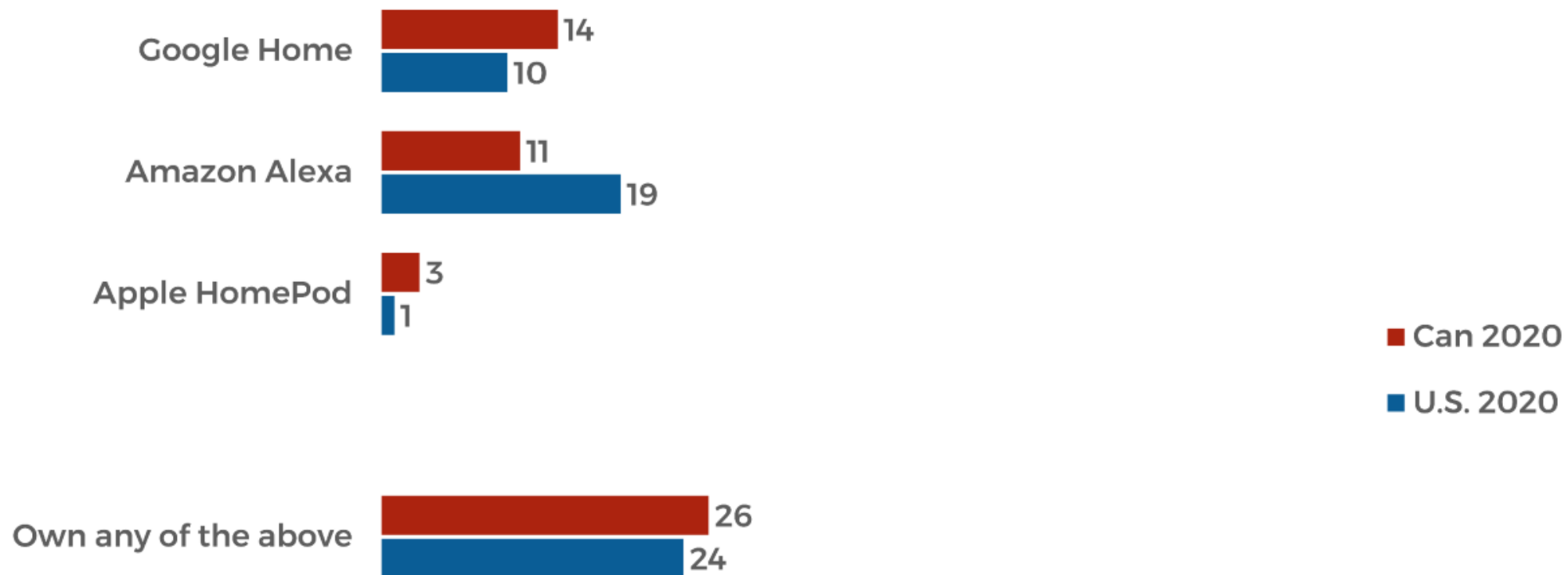
% AWARE OF ANY SMART SPEAKER BRAND



Smart Speaker Ownership

TOTAL POPULATIONS 18+

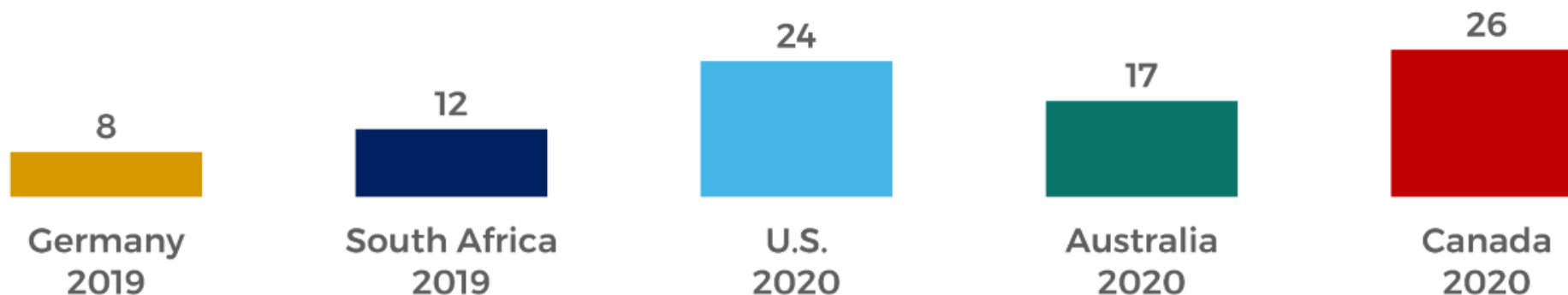
% OWNING SMART SPEAKER



Smart Speaker Ownership

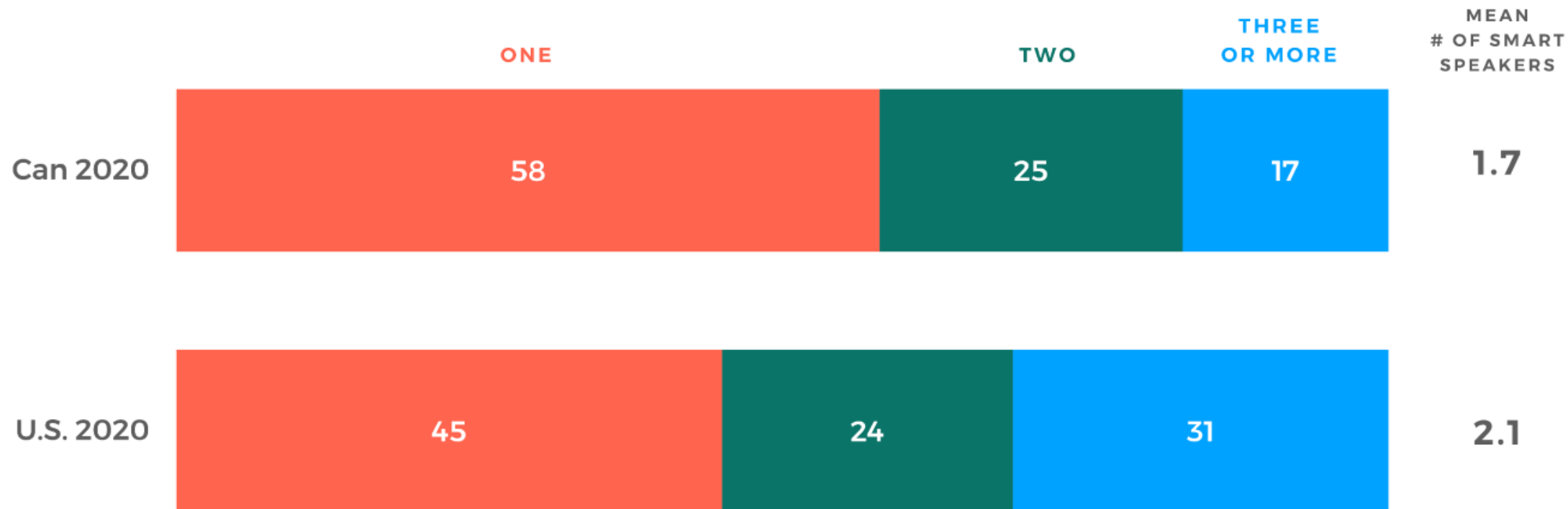
GERMANY, SOUTH AFRICA MAJOR METRO COMMERCIAL, U.S., AUSTRALIA, AND CANADA POPULATIONS AGE 18+

% OWN ANY SMART SPEAKER BRAND



Number of Smart Speakers in Household

BASE: CANADIAN AGE 18+ SMART SPEAKER OWNERS

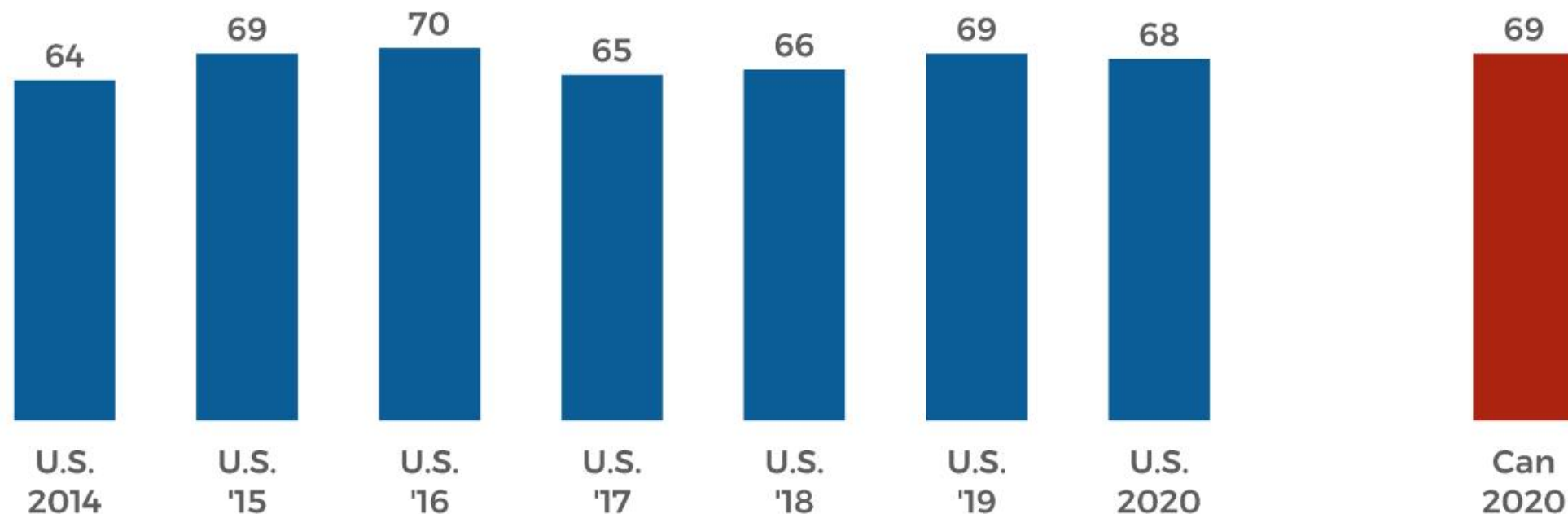


Listening to AM/FM Radio in the Last Week

TOTAL POPULATIONS 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



 THE INFINITE DIAL® 2020

Online Audio



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Listening to AM/FM Radio Online in Last Month

TOTAL POPULATIONS 18+

% LISTENED TO AM/FM RADIO ONLINE IN LAST MONTH



Listening to AM/FM Radio Online in Last Week

TOTAL POPULATIONS 18+

% LISTENED TO AM/FM RADIO ONLINE IN LAST WEEK

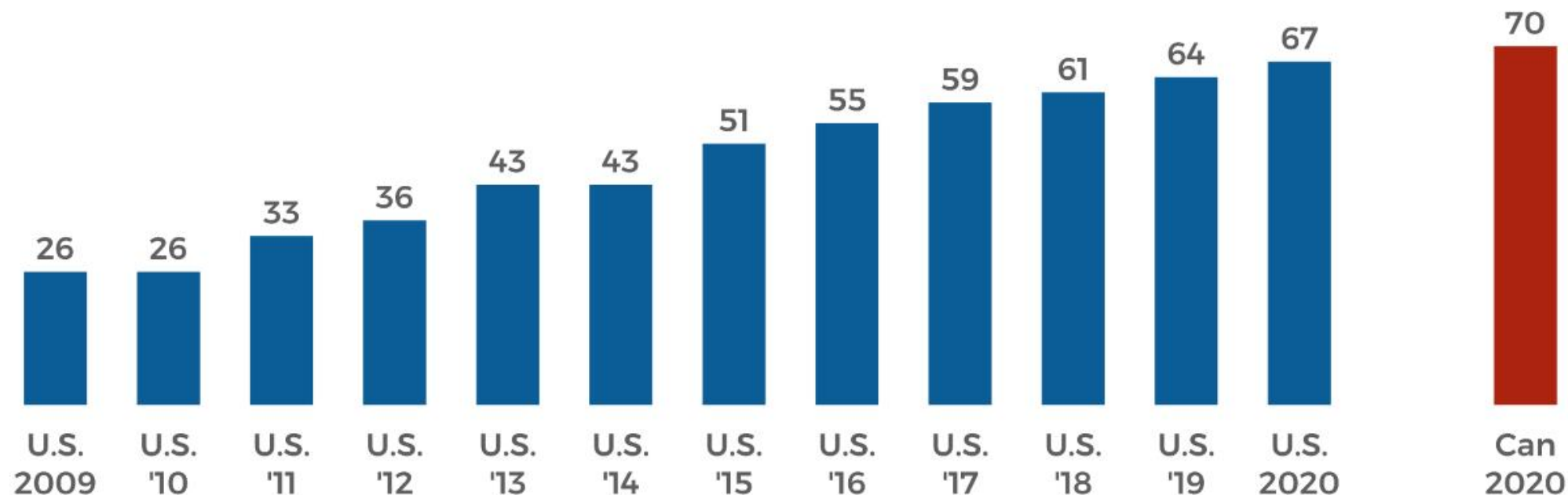


Monthly Online Audio Listening

TOTAL POPULATIONS 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

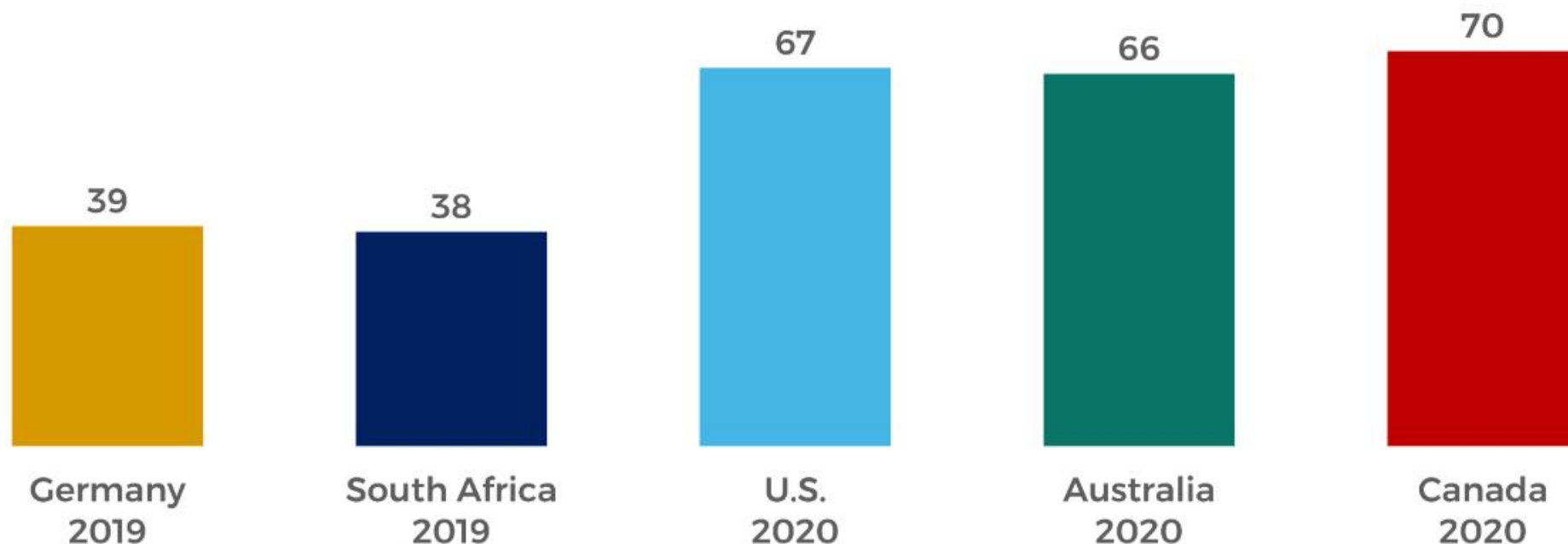


Monthly Online Audio Listening

GERMANY, SOUTH AFRICA MAJOR METRO COMMERCIAL, U.S., AUSTRALIA, AND CANADA POPULATIONS AGE 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

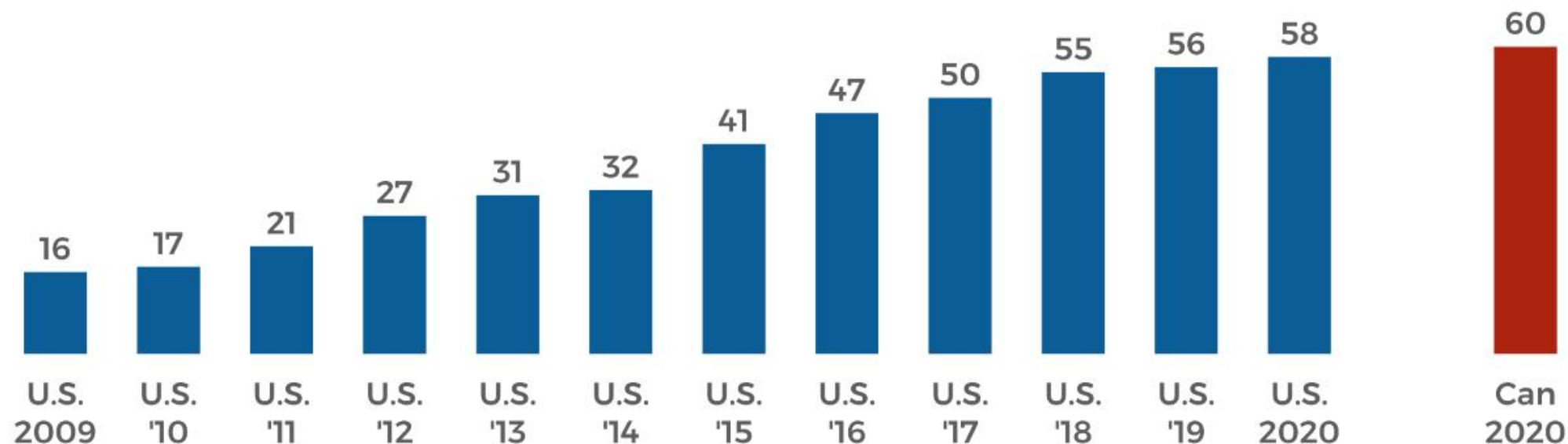


Weekly Online Audio Listening

TOTAL POPULATIONS 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

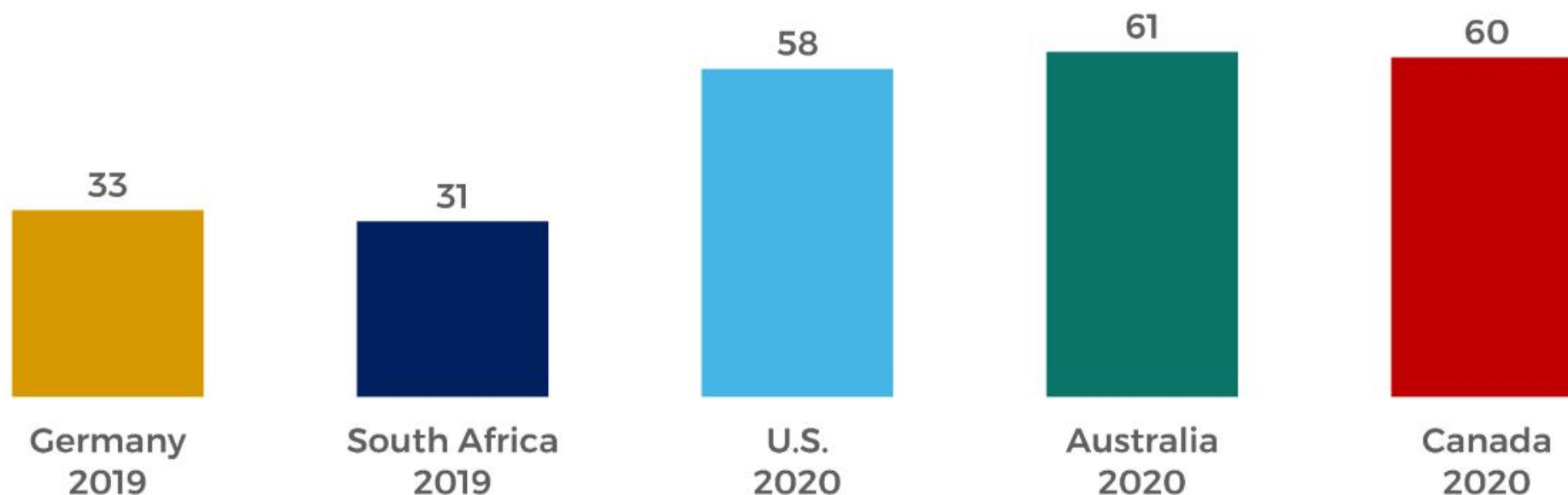


Weekly Online Audio Listening

GERMANY, SOUTH AFRICA MAJOR METRO COMMERCIAL, U.S., AUSTRALIA, AND CANADA POPULATIONS AGE 18+

% LISTENED TO ONLINE AUDIO IN LAST WEEK

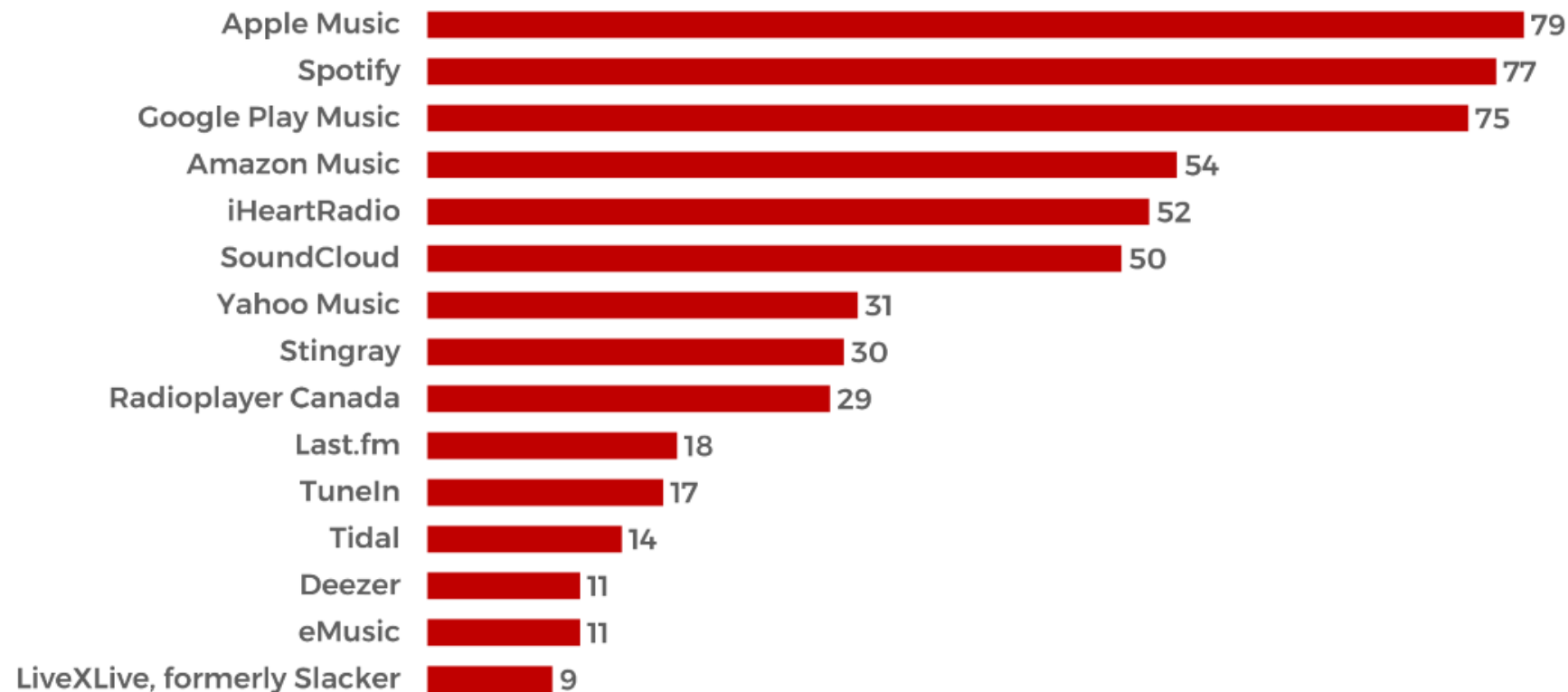
ONLINE AUDIO = LISTENING TO AM/FM RADIO STATIONS ONLINE AND/OR
LISTENING TO STREAMED AUDIO CONTENT AVAILABLE ONLY ON THE INTERNET



Audio Brand Awareness

TOTAL CANADIAN POPULATION 18+

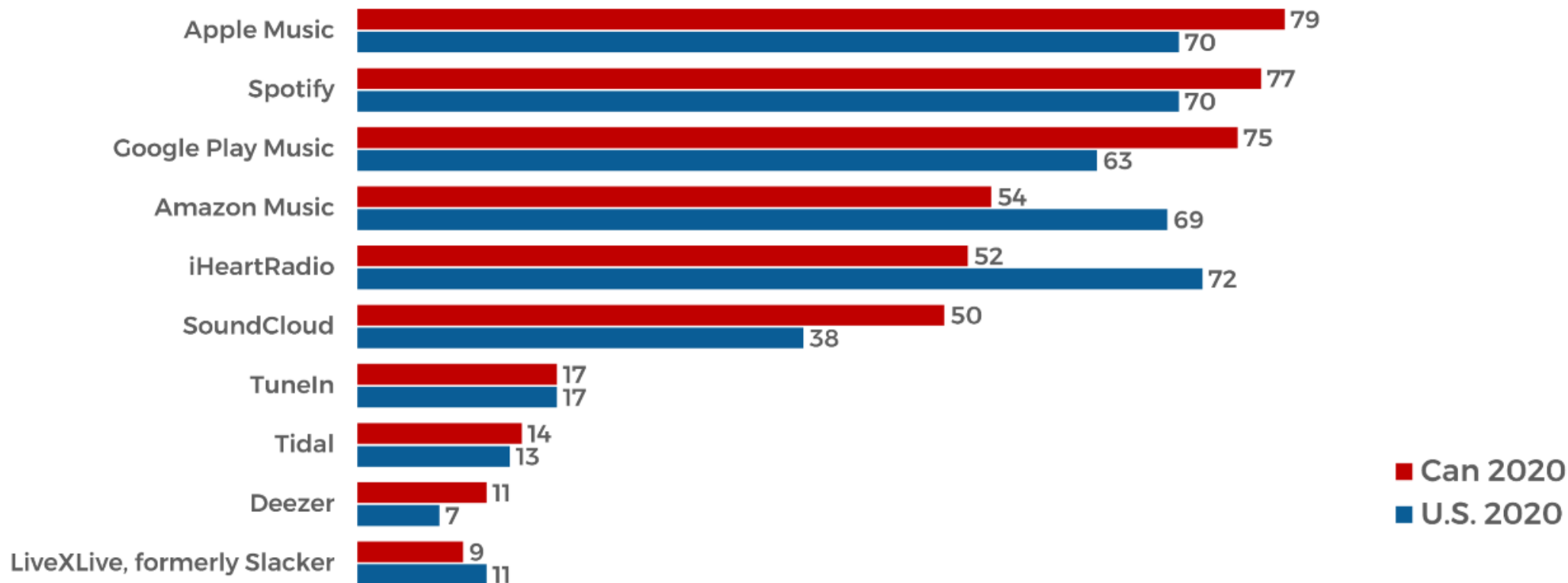
% AWARE OF AUDIO BRAND



Audio Brand Awareness

TOTAL POPULATIONS 18+

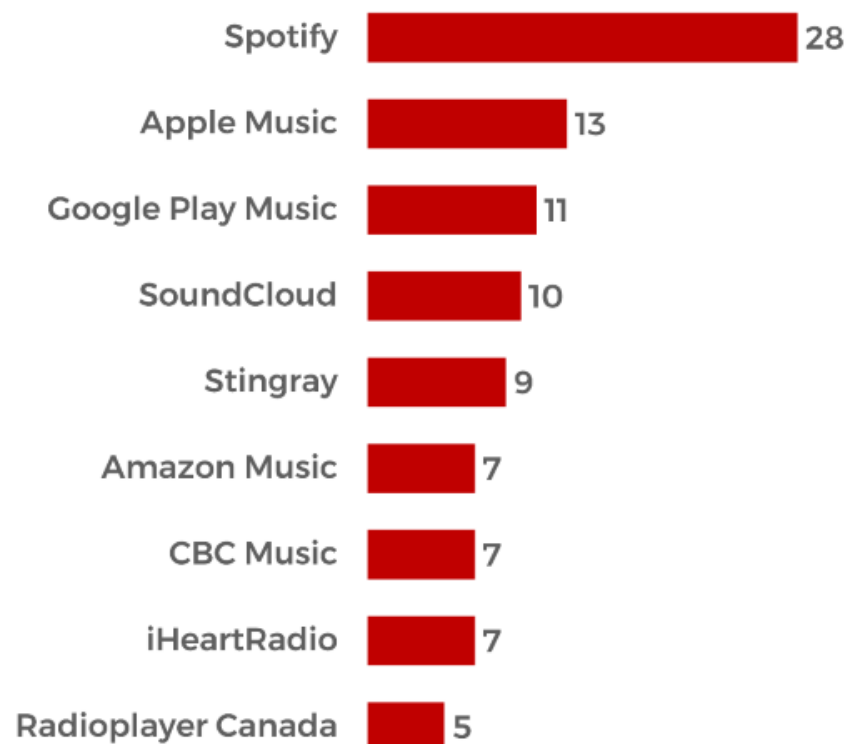
% AWARE OF AUDIO BRAND



Listened to Online Audio Brand in Last Month

TOTAL CANADIAN POPULATION 18+

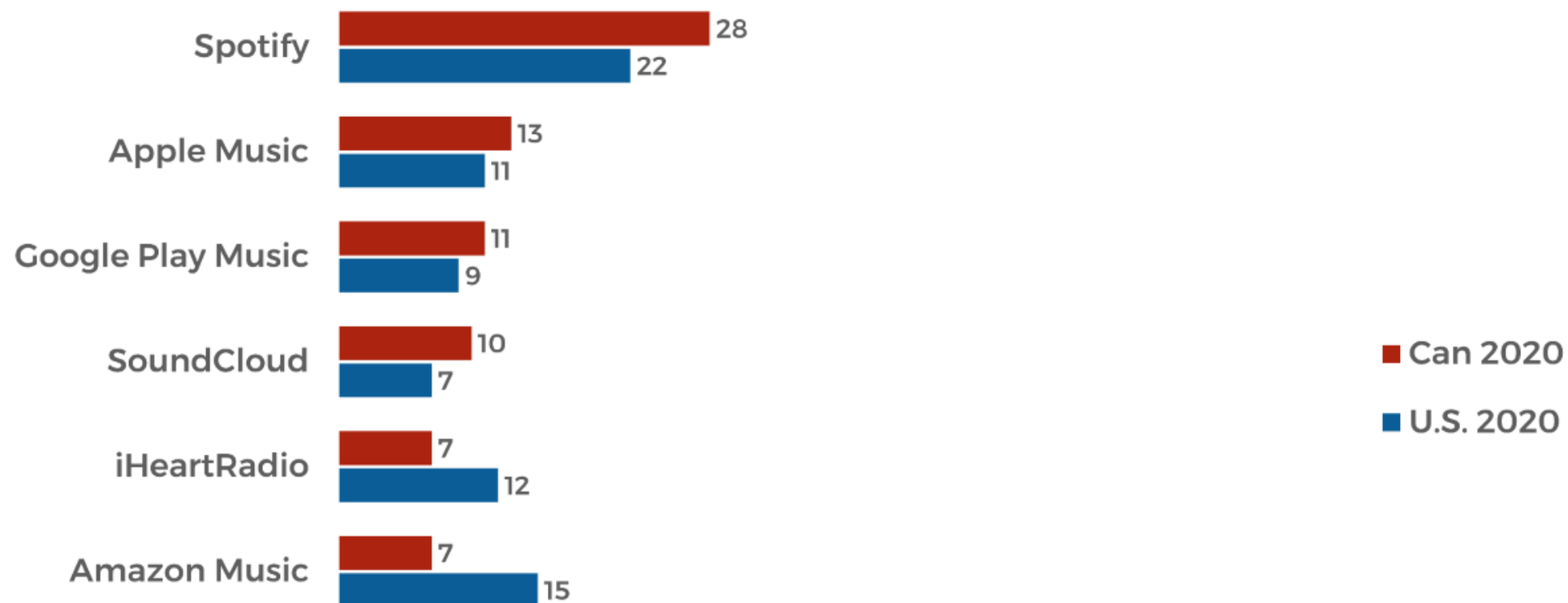
% LISTENED TO ONLINE AUDIO BRAND IN LAST MONTH



Listened to Online Audio Brand in Last Month

TOTAL POPULATIONS 18+

% LISTENED TO ONLINE AUDIO BRAND IN LAST MONTH



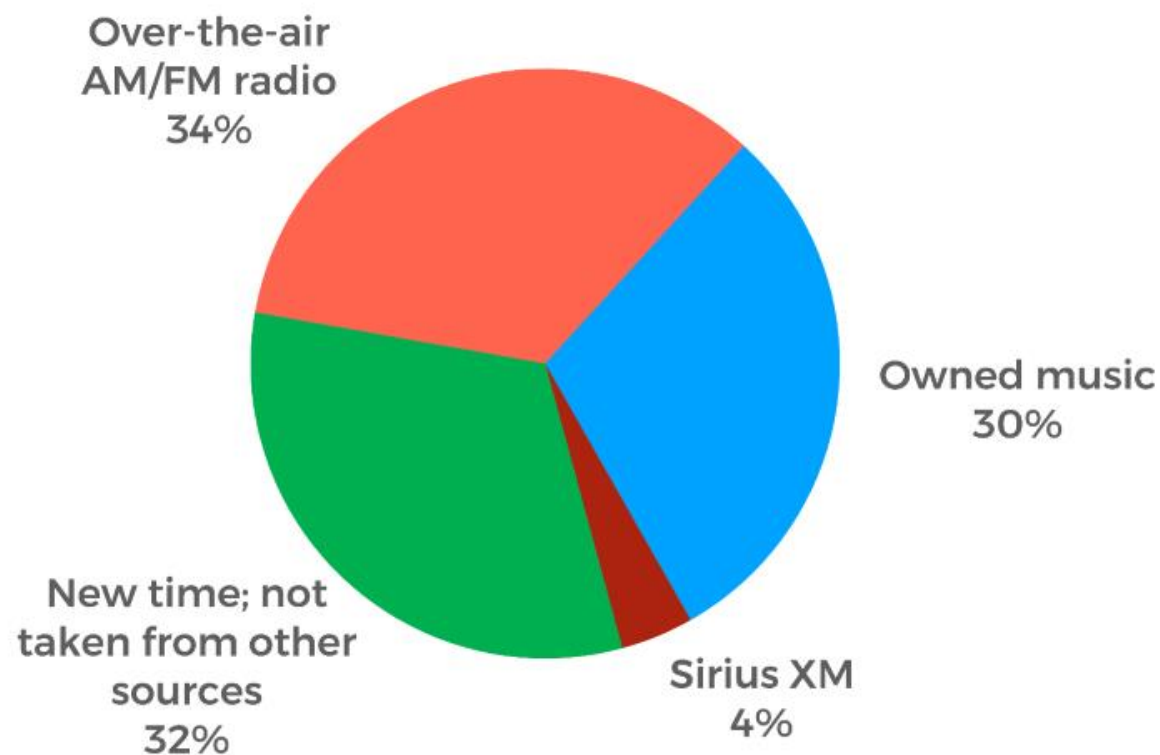
Audio Brand Used Most Often

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



What is Time Spent with Online Audio Mostly Replacing?

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

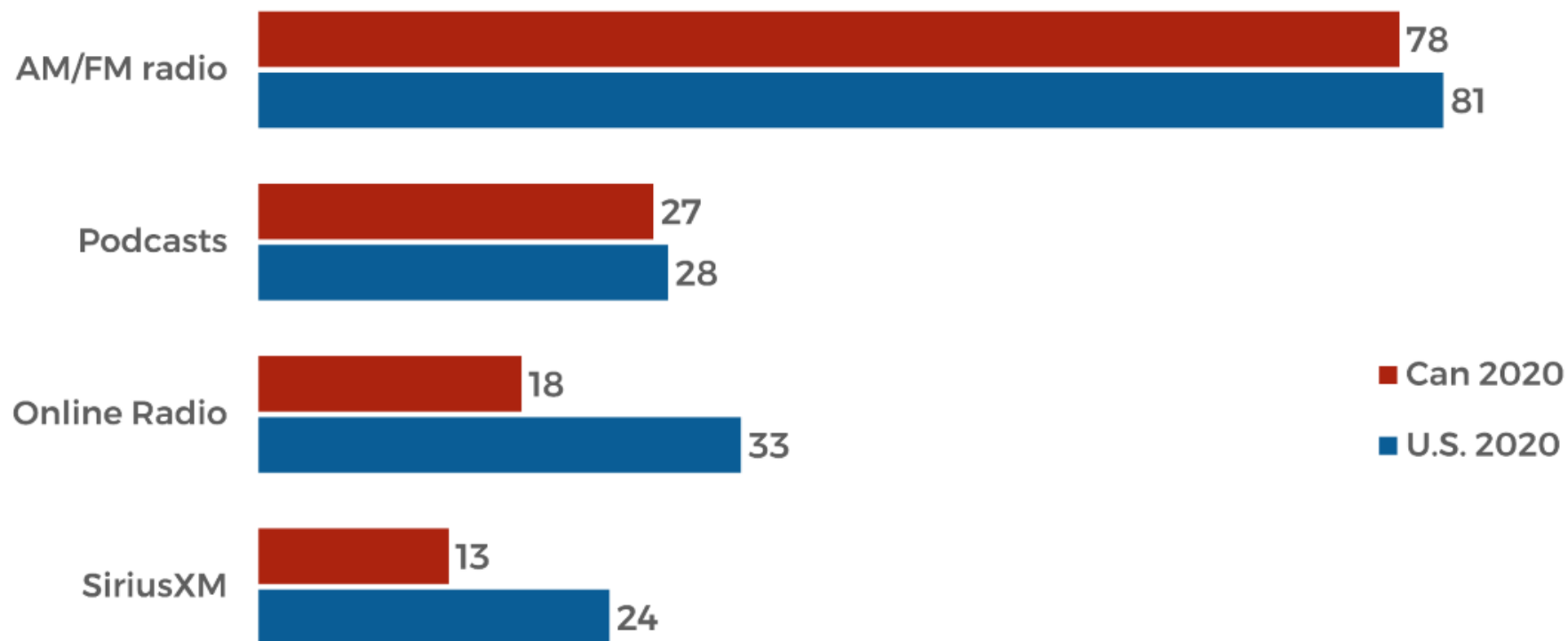


In-Car Audio

Audio Sources Used in Car

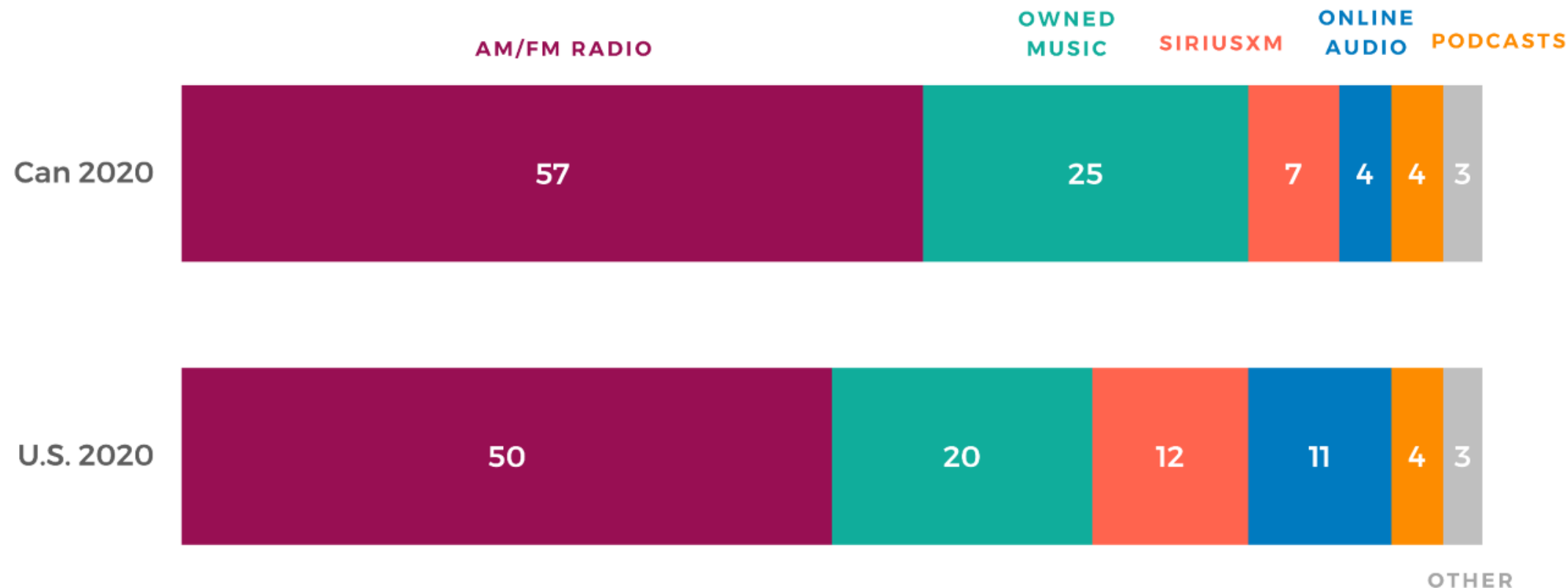
BASE: CANADIAN 18+ AND HAS DRIVEN/RIDDEN IN CAR IN LAST MONTH; 85%

% USING AUDIO SOURCE IN CAR



Audio Source Used Most Often in Car

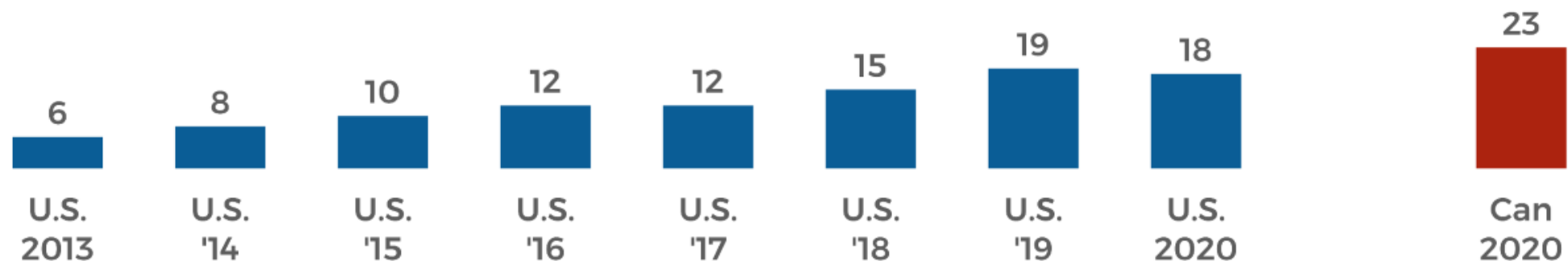
BASE: AGE 18+, DRIVEN/RIDDEN IN CAR IN LAST MONTH, AND USE ANY AUDIO SOURCE IN CAR



In-Dash Information and Entertainment Systems

BASE: AGE 18+ AND HAS DRIVEN/RIDDEN IN CAR IN LAST MONTH

% OWNING IN-DASH INFORMATION AND ENTERTAINMENT SYSTEM IN CAR



 THE INFINITE DIAL® 2020

Podcasting



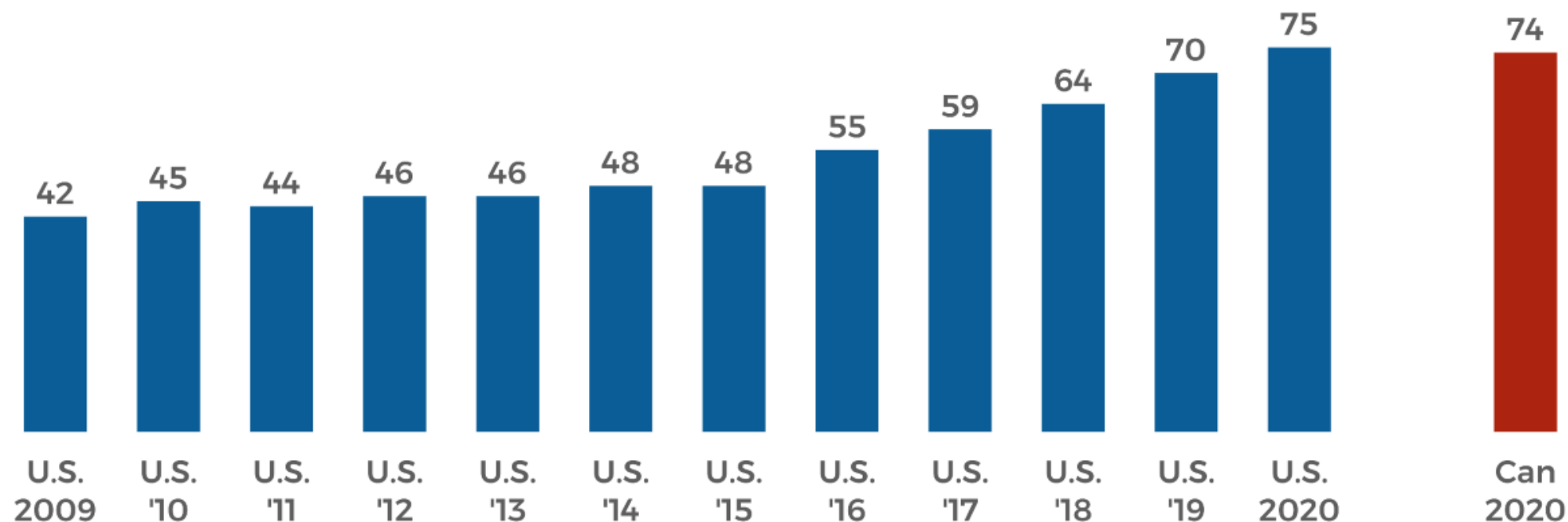
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Podcasting Familiarity

TOTAL POPULATIONS 18+

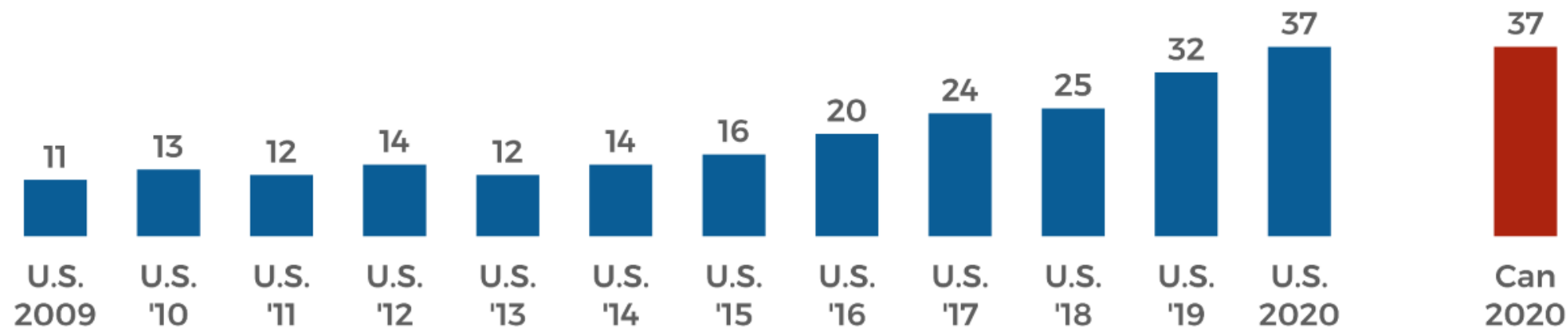
% FAMILIAR WITH THE TERM "PODCASTING"



Monthly Podcast Listening

TOTAL POPULATIONS 18+

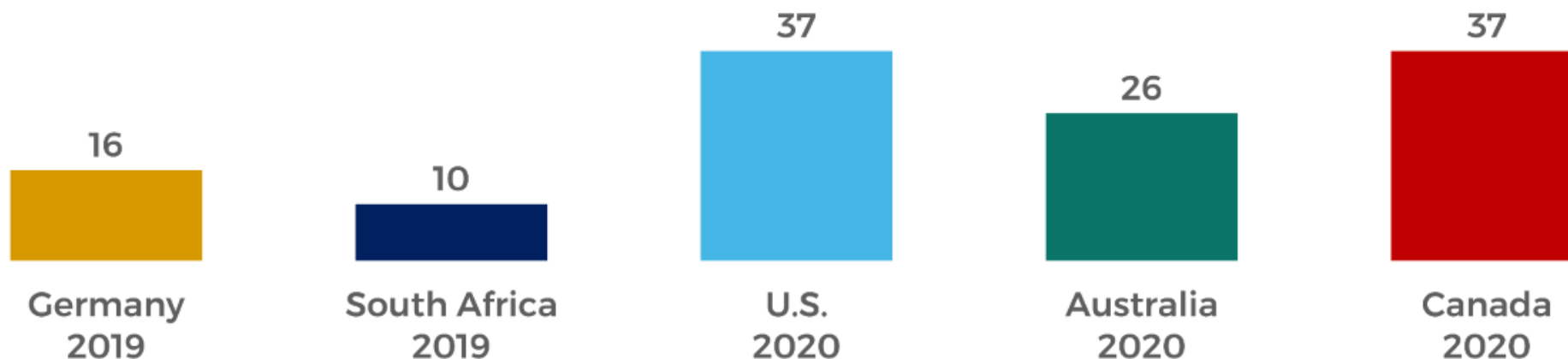
% LISTENED TO A PODCAST IN LAST MONTH



Monthly Podcast Listening

GERMANY, SOUTH AFRICA MAJOR METRO COMMERCIAL, U.S., AUSTRALIA, AND CANADA POPULATIONS AGE 18+

% LISTENED TO A PODCAST IN THE LAST MONTH

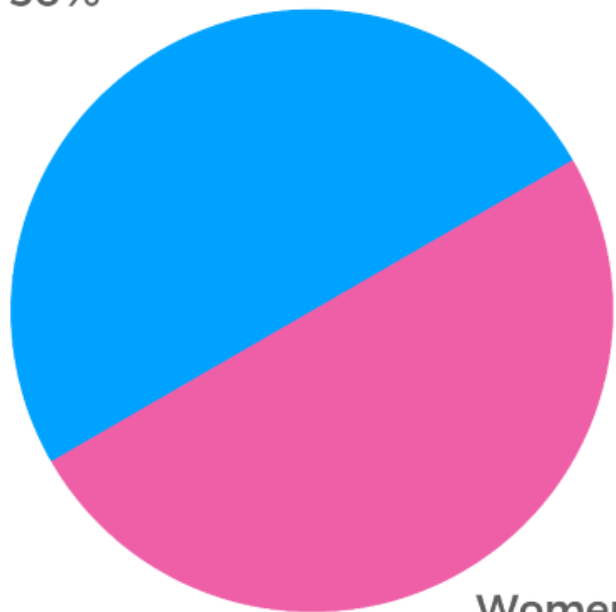


Sex of Monthly Podcast Listeners

BASE: CANADIAN AGE 18+ AND LISTENED TO PODCAST IN LAST MONTH

CANADIAN POPULATION 18+

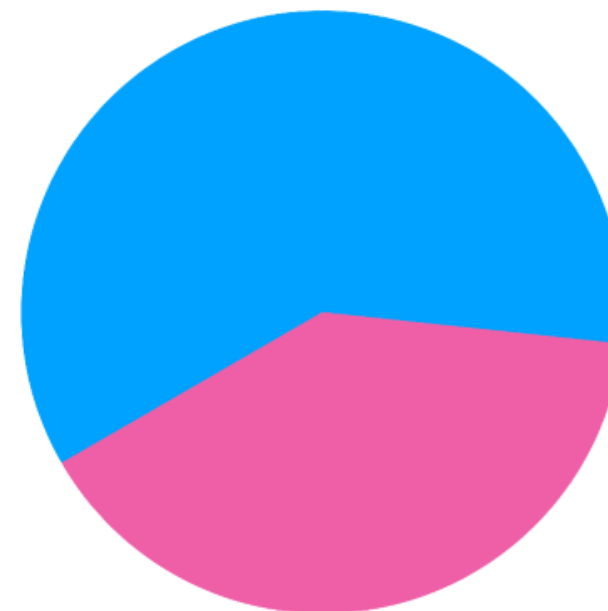
Men
50%



Women
50%

MONTHLY PODCAST CONSUMERS 18+

Men
60%

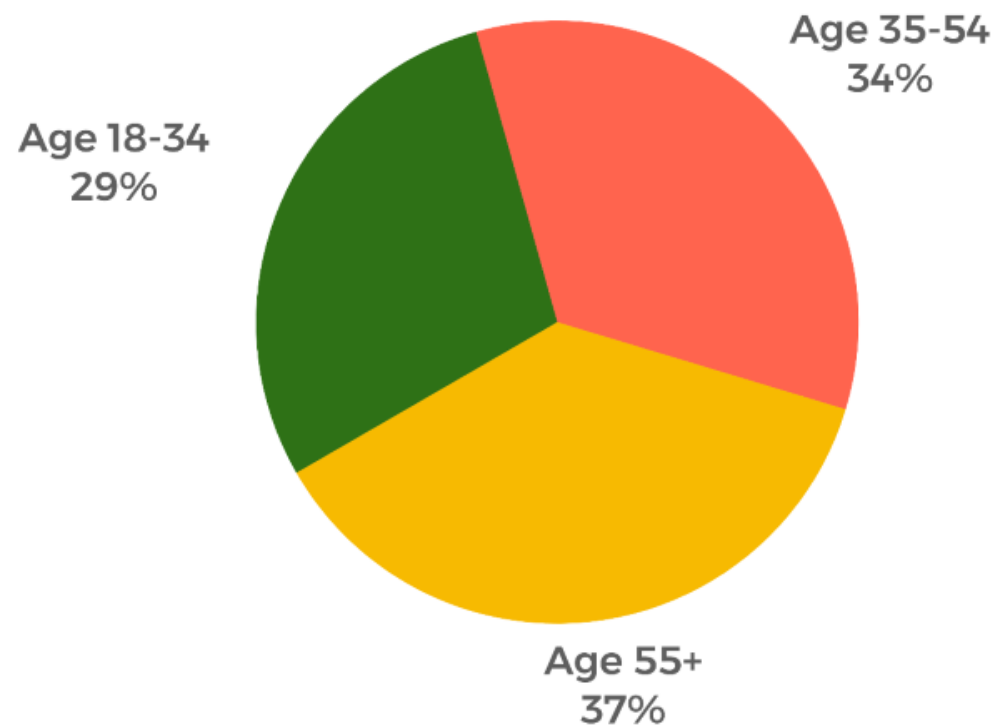


Women
40%

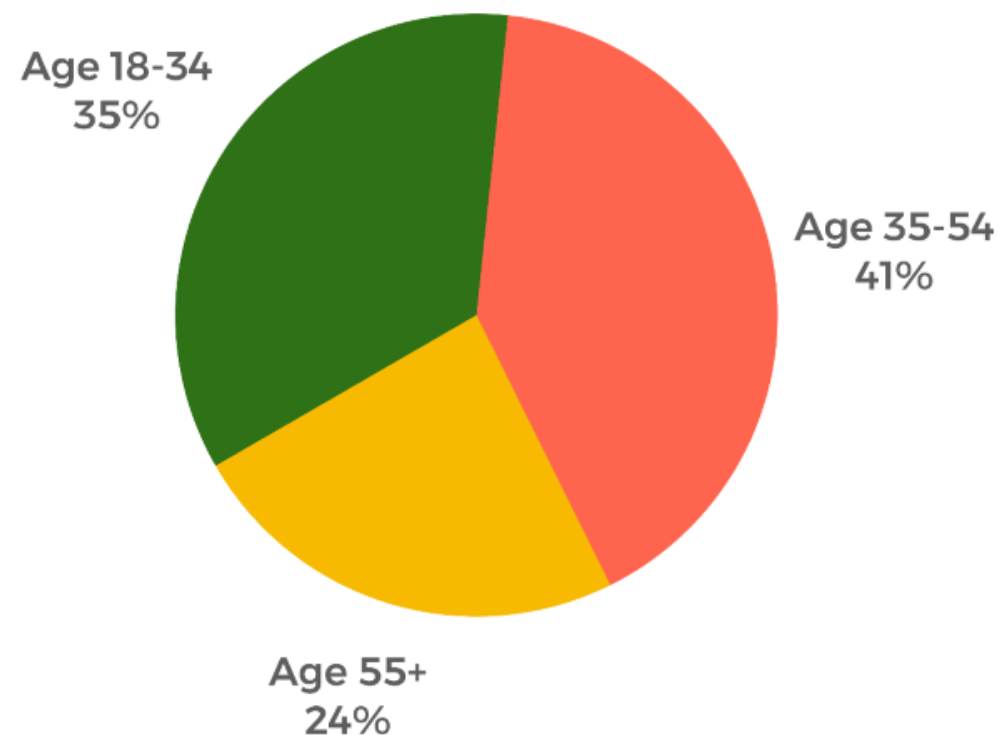
Age of Monthly Podcast Listeners

BASE: CANADIAN AGE 18+ AND LISTENED TO PODCAST IN LAST MONTH

CANADIAN POPULATION 18+



MONTHLY PODCAST CONSUMERS 18+



Weekly Podcast Listening

TOTAL POPULATIONS 18+

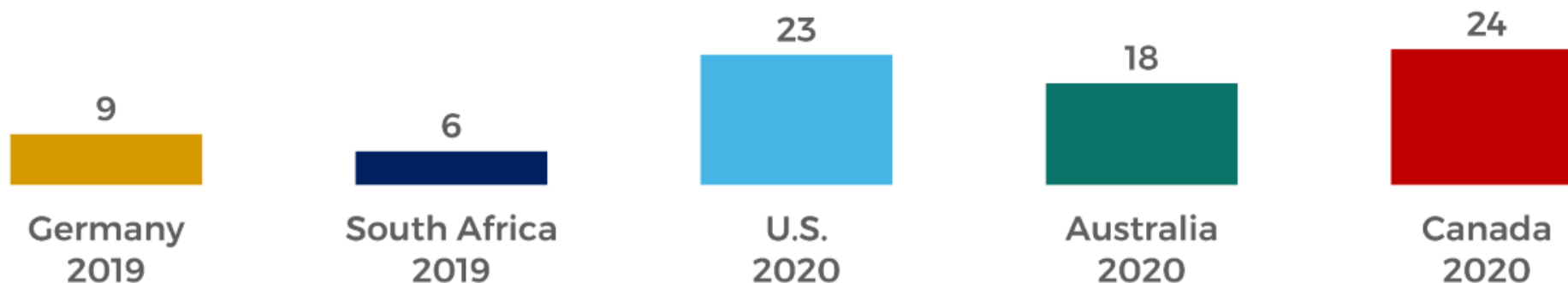
% LISTENED TO A PODCAST IN LAST WEEK



Weekly Podcast Listening

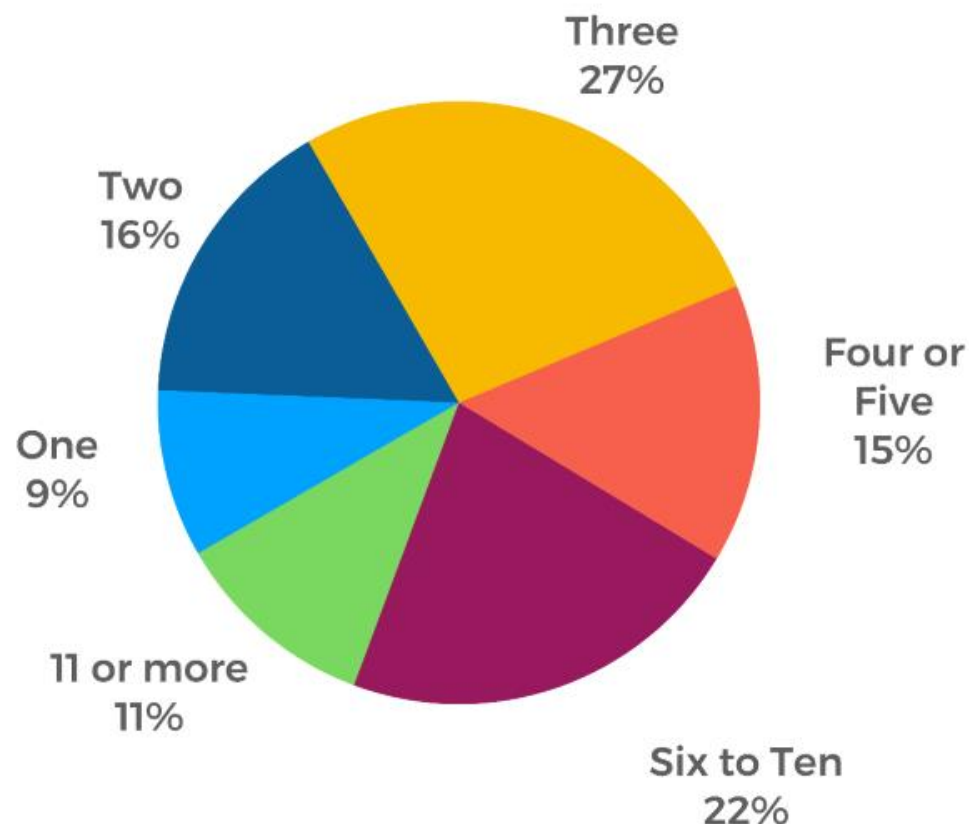
GERMANY, SOUTH AFRICA MAJOR METRO COMMERCIAL, U.S., AUSTRALIA, AND CANADA POPULATIONS AGE 18+

% LISTENED TO A PODCAST IN THE LAST WEEKLY



Number of Podcasts Listened to in Last Week

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



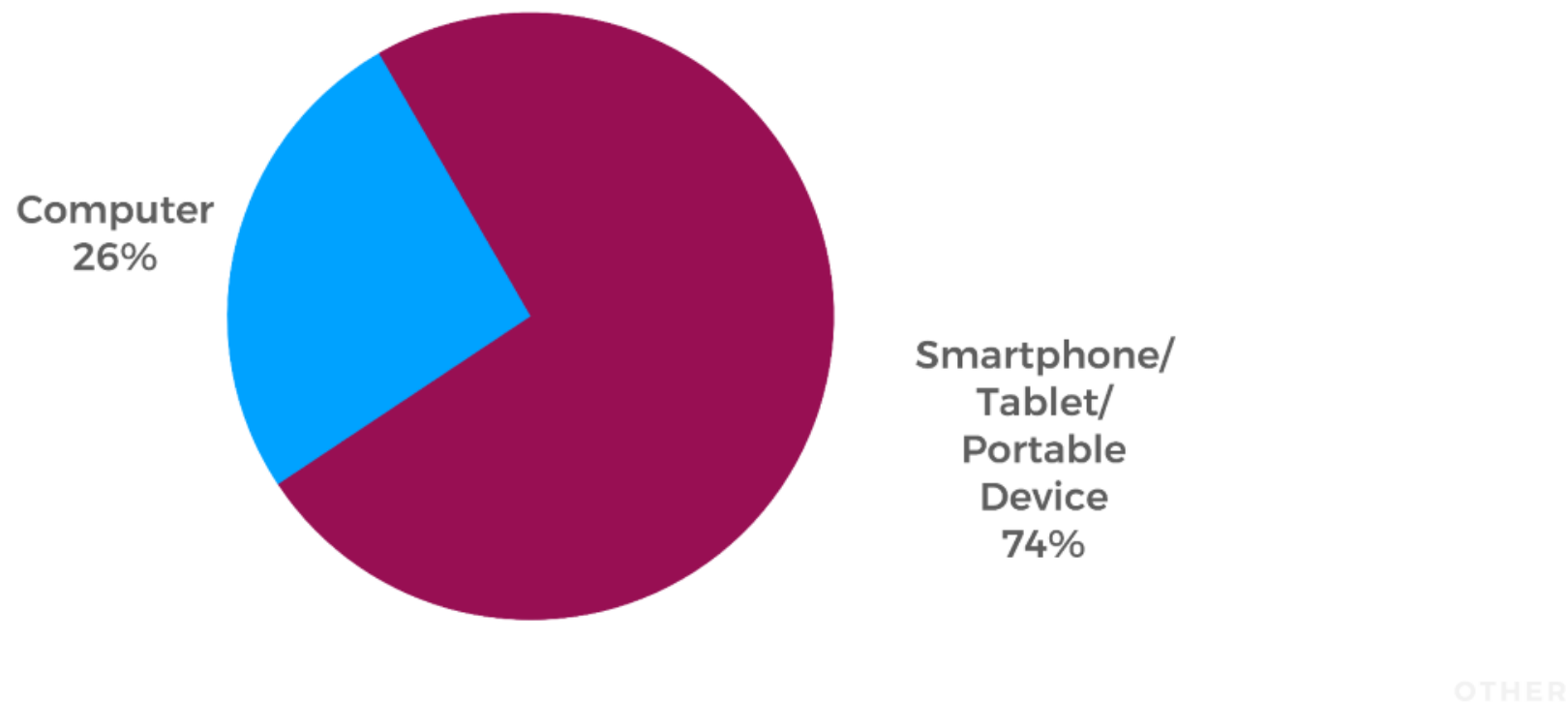
Canadian weekly podcast listeners averaged

six podcasts

in the last week

Device Used Most Often to Listen to Podcasts

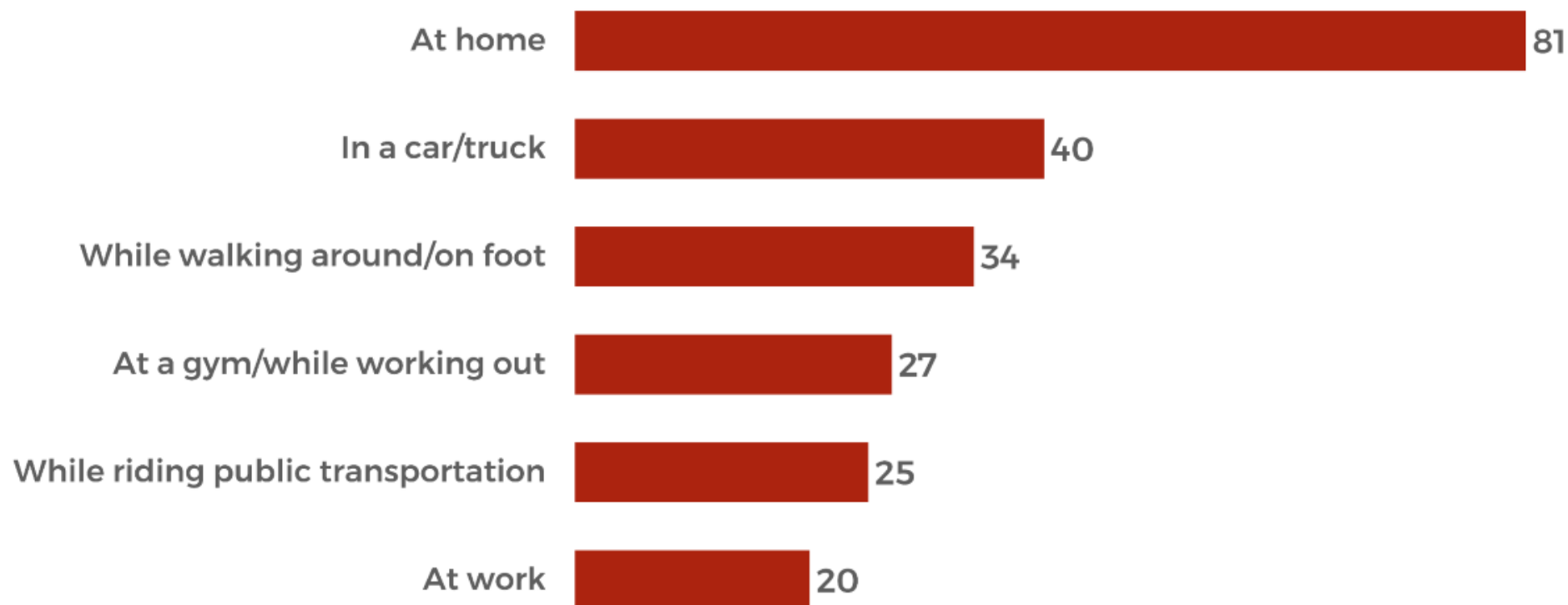
BASE: CANADIAN 18+ AND EVER LISTENED TO A PODCAST



Podcast Listening Locations

BASE: CANADIAN 18+ AND EVER LISTENED TO A PODCAST

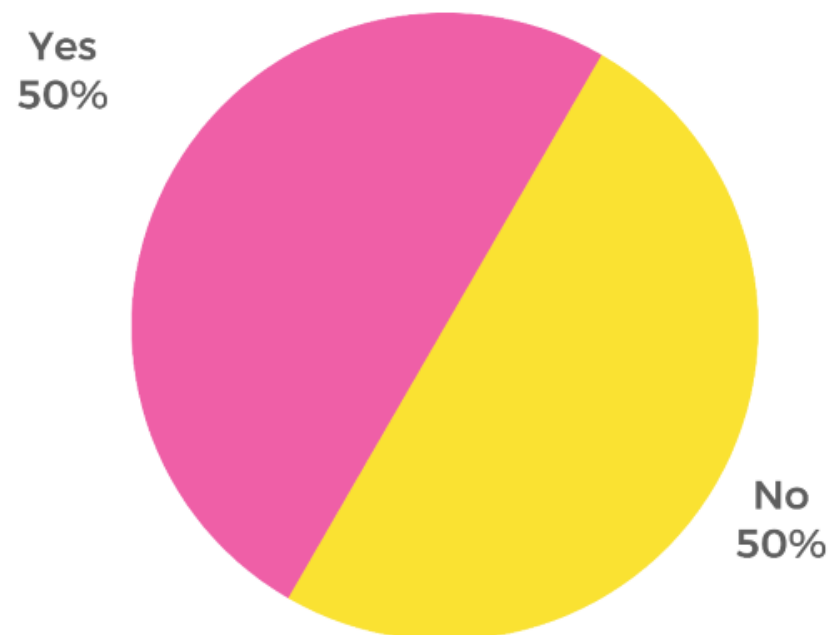
% EVER LISTEN TO A PODCAST IN LOCATION



Listening to Podcasts from Public Radio Producers

BASE: CANADIAN 18+ AND EVER LISTENED TO A PODCAST

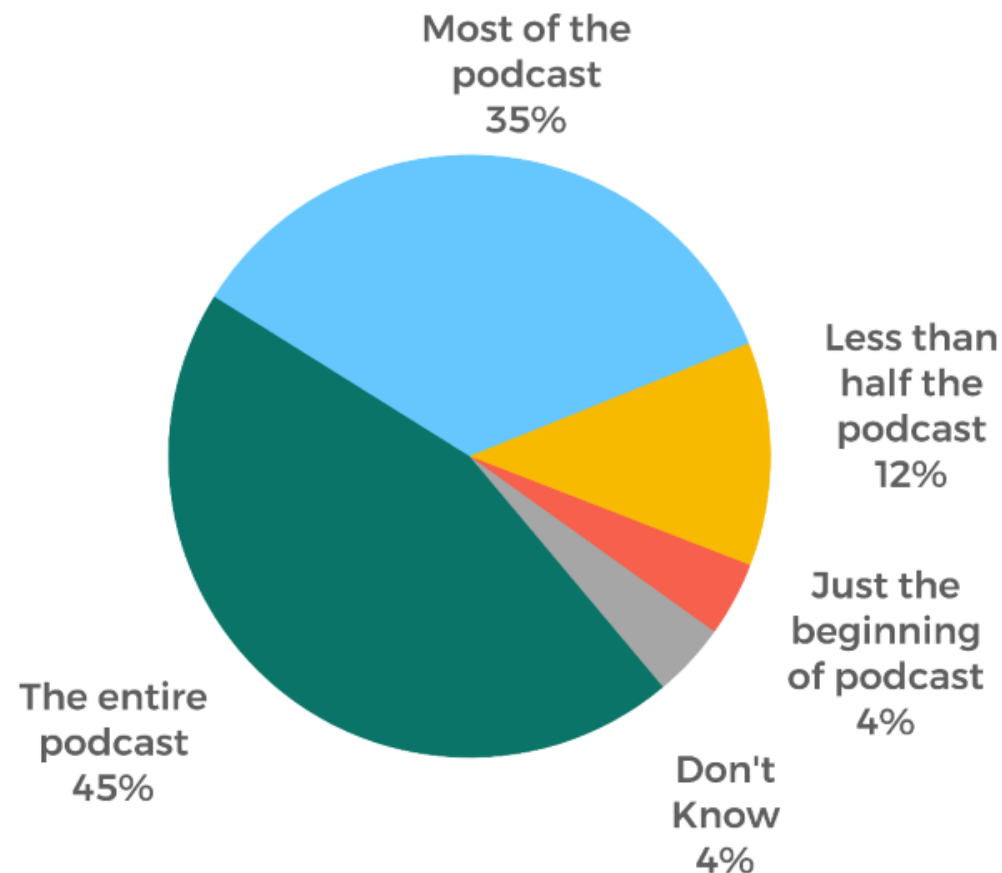
% LISTENED TO PODCASTS FROM PUBLIC RADIO PRODUCERS SUCH AS CBC OR RADIO CANADA, OR NPR



Amount of Podcast Episodes Listened to

BASE: CANADIAN 18+ AND EVER LISTENED TO A PODCAST

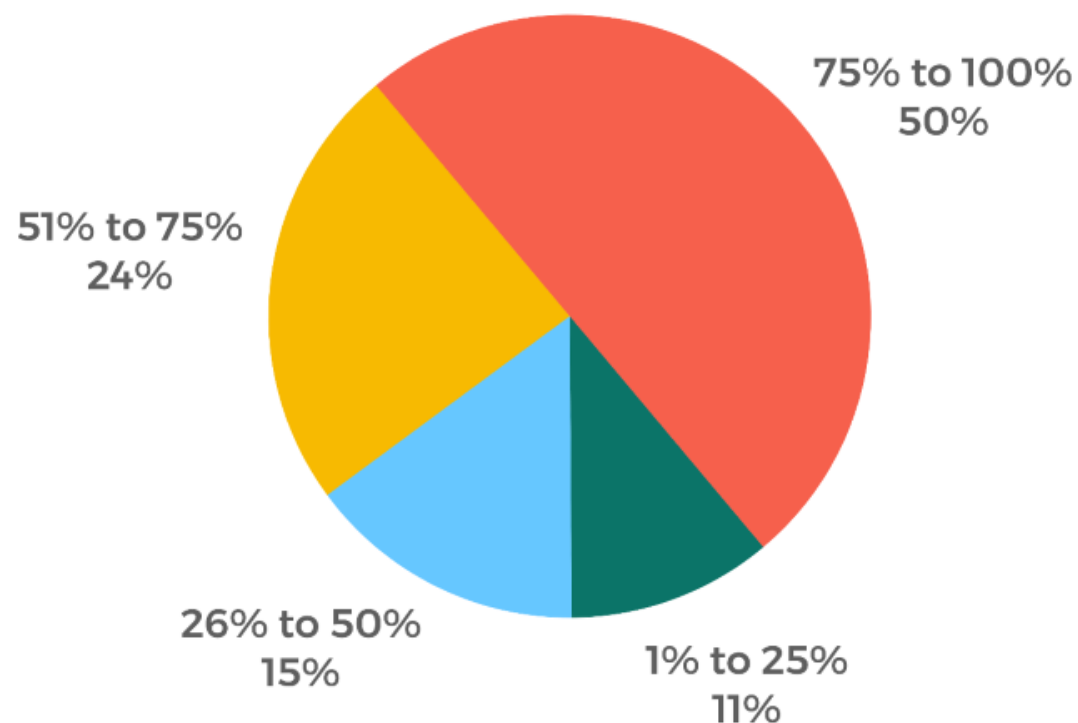
"Think about the audio podcast episodes you listen to. Do you typically listen to...?"



Amount of Podcast Episode Listened to

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

"What percent of all the podcasts you download would you say you typically listen to?"



Observations

Canadian top 3 mobile carriers' introduction of unlimited data plans in June 2019 had a significant impact on growth of online data consumption.

Observations

Monthly and weekly penetration of online audio in Canada now surpasses that of the U.S. amongst persons 18+.

Observations

Smart Speaker ownership now exceeds one in four Canadians 18+, with Google products leading the market.

Observations

Spotify is particularly strong in Canada compared to the U.S. (though, it should be noted that the U.S. alone has Pandora). Google performs well, while Amazon Music lags behind its usage in the U.S.

Observations

The percentage of Canadian drivers/passengers with an in-dash, internet-enabled information and entertainment system is approaching one in four.

Observations

Podcast consumption in Canada, as a percentage of the population 18+, now equals that of the U.S.

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