



 THE INFINITE DIAL[®] 2019

The Infinite Dial[®] 2019

Canada

#InfiniteDial



#InfiniteDial

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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

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Media & Technologies



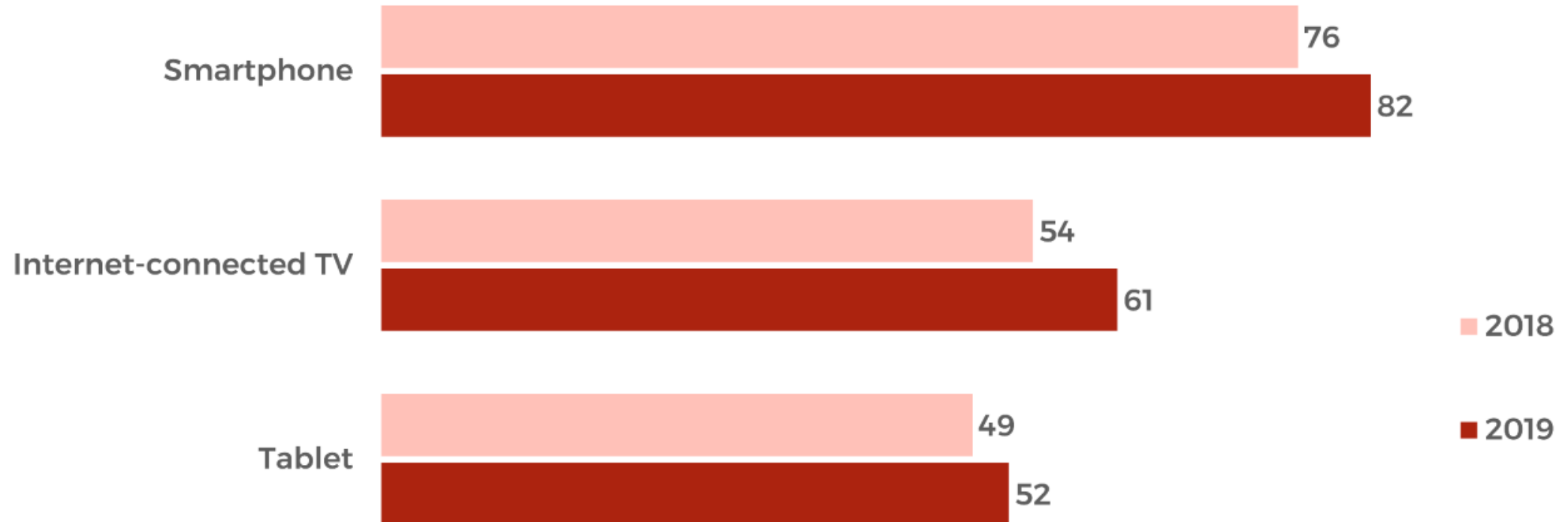
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Device Ownership

TOTAL CANADIAN POPULATION 18+

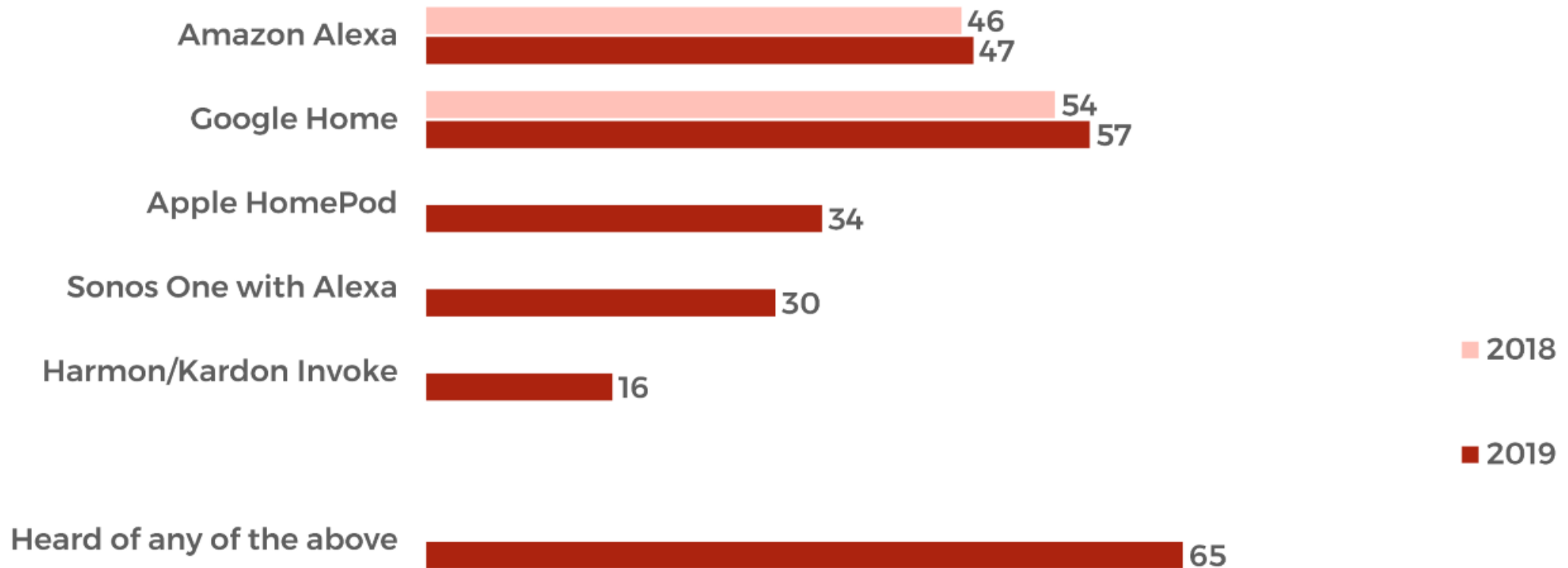
% OWNING DEVICE



Smart Speaker Awareness

TOTAL CANADIAN POPULATION 18+

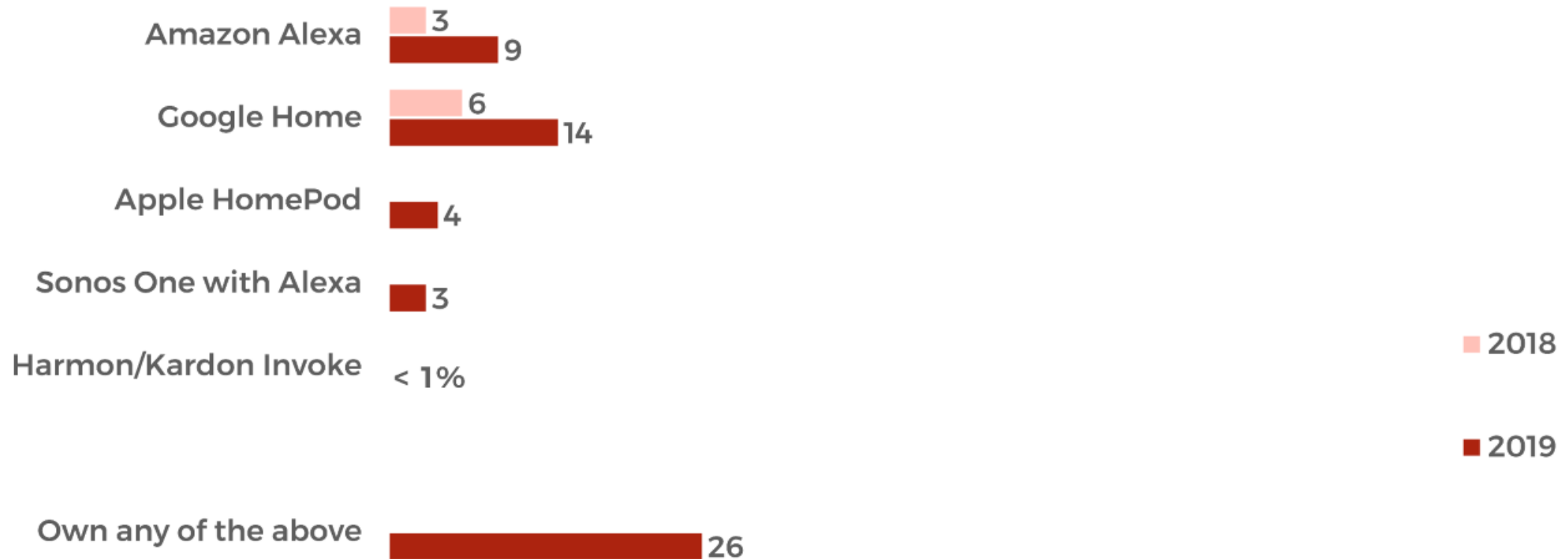
% AWARE OF SMART SPEAKER BRAND



Smart Speaker Ownership

TOTAL CANADIAN POPULATION 18+

% OWNING SMART SPEAKER



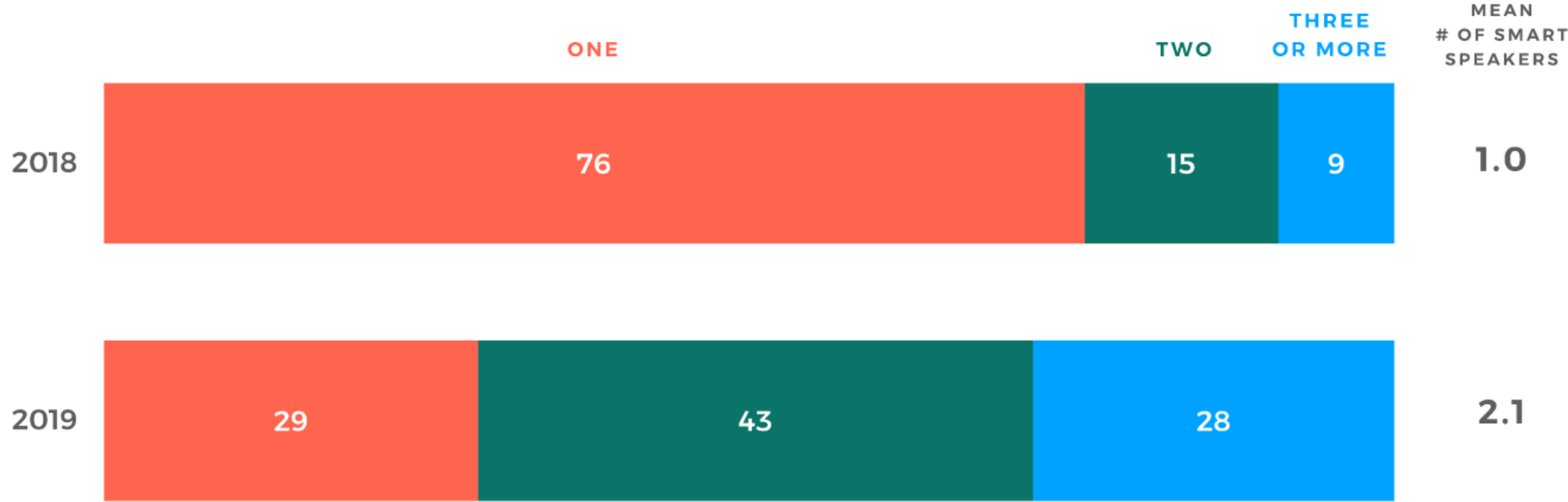
Number of Smart Speakers in Household

BASE: CANADIAN AGE 18+ SMART SPEAKER OWNERS



Number of Smart Speakers in Household

BASE: CANADIAN AGE 18+ SMART SPEAKER OWNERS

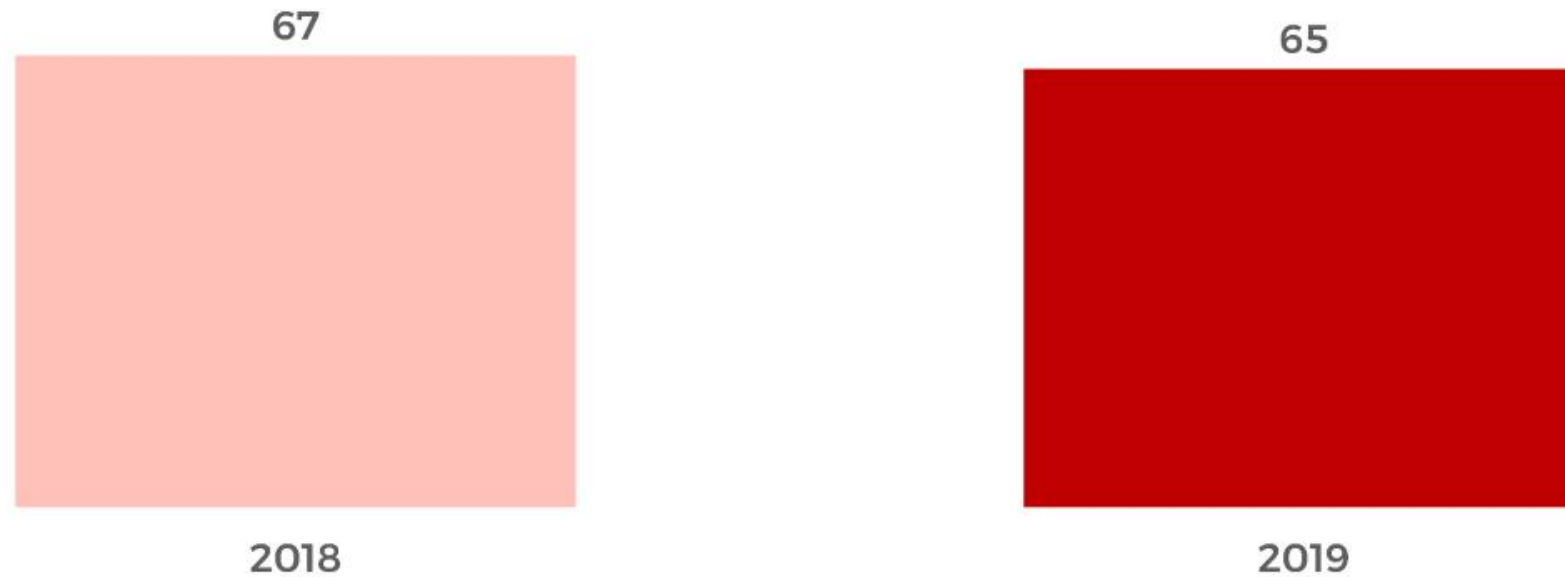


Listening to AM/FM Radio in the Last Week

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





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Online Audio



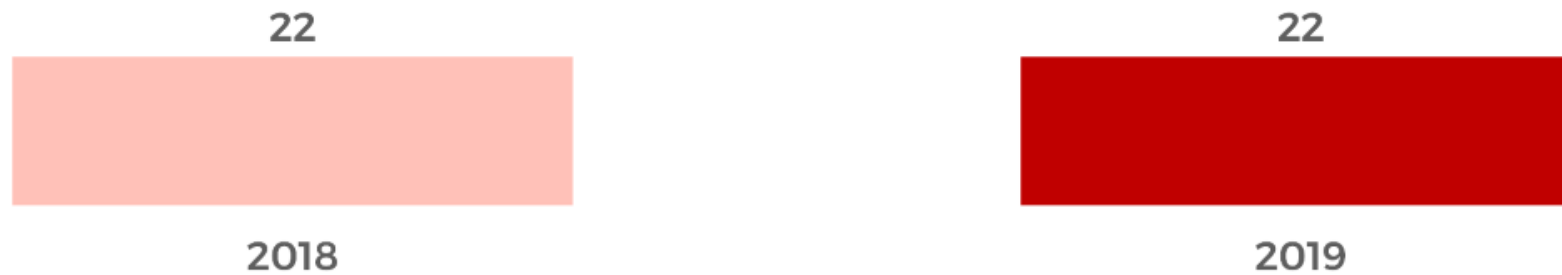
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Listening to AM/FM Radio Online in Last Month

TOTAL CANADIAN POPULATION 18+

% LISTENED TO AM/FM RADIO ONLINE IN LAST MONTH



Listening to AM/FM Radio Online in Last Week

TOTAL CANADIAN POPULATION 18+

% LISTENED TO AM/FM RADIO ONLINE IN LAST WEEK



Listening to Internet-Only Audio in Last Month

TOTAL CANADIAN POPULATION 18+

% LISTENED TO INTERNET-ONLY AUDIO IN LAST MONTH



Listening to Internet-Only Audio in Last Week

TOTAL CANADIAN POPULATION 18+

% LISTENED TO INTERNET-ONLY AUDIO IN LAST WEEK



Listening to Internet-Only Audio in Last 24 Hours

TOTAL CANADIAN POPULATION 18+

% LISTENED TO INTERNET-ONLY AUDIO IN LAST 24 HOURS

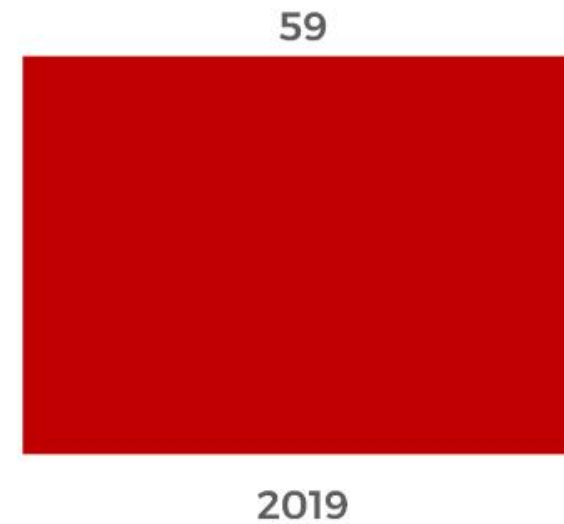
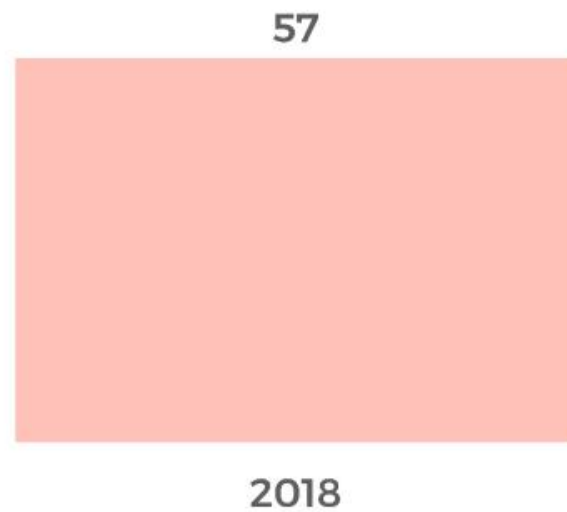


Monthly Online Audio Listening

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



Weekly Online Audio Listening

TOTAL CANADIAN POPULATION 18+

% LISTENED TO ONLINE AUDIO IN LAST WEEK

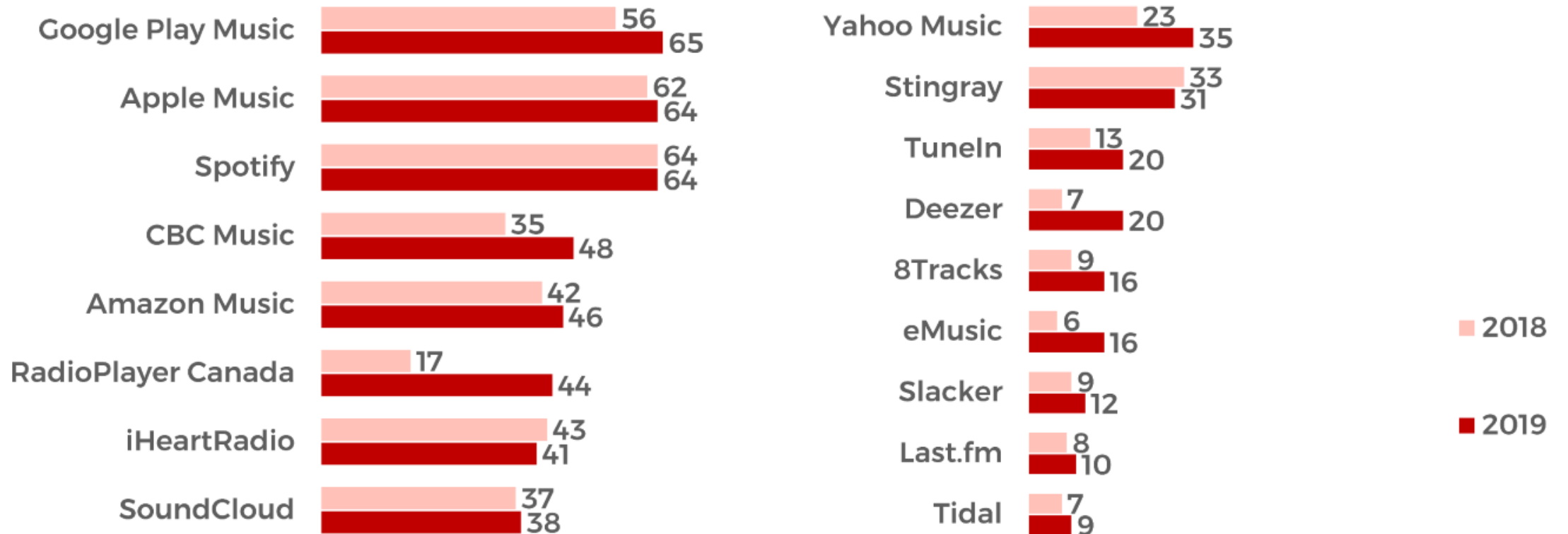
ONLINE AUDIO = LISTENING TO AM/FM RADIO STATIONS ONLINE AND/OR LISTENING TO STREAMED AUDIO CONTENT AVAILABLE ONLY ON THE INTERNET



Audio Brand Awareness

TOTAL CANADIAN POPULATION 18+

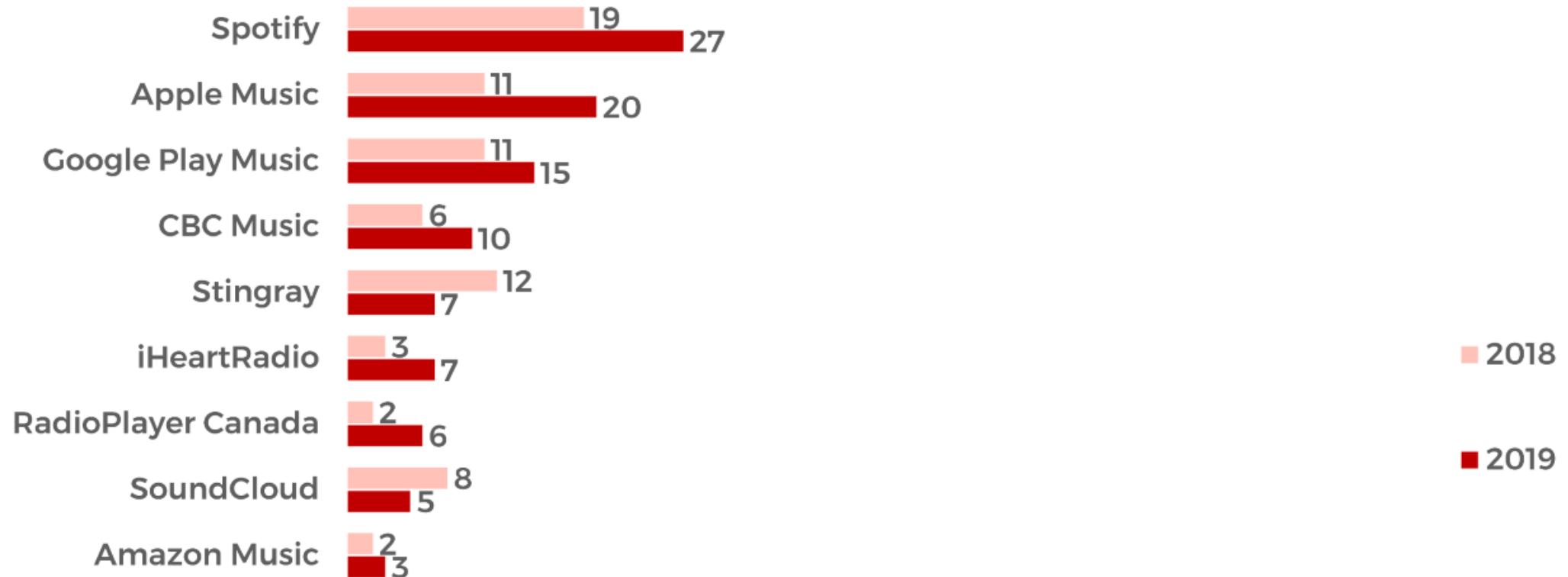
% AWARE OF AUDIO BRAND



Monthly Online Audio Listening

TOTAL CANADIAN POPULATION 18+

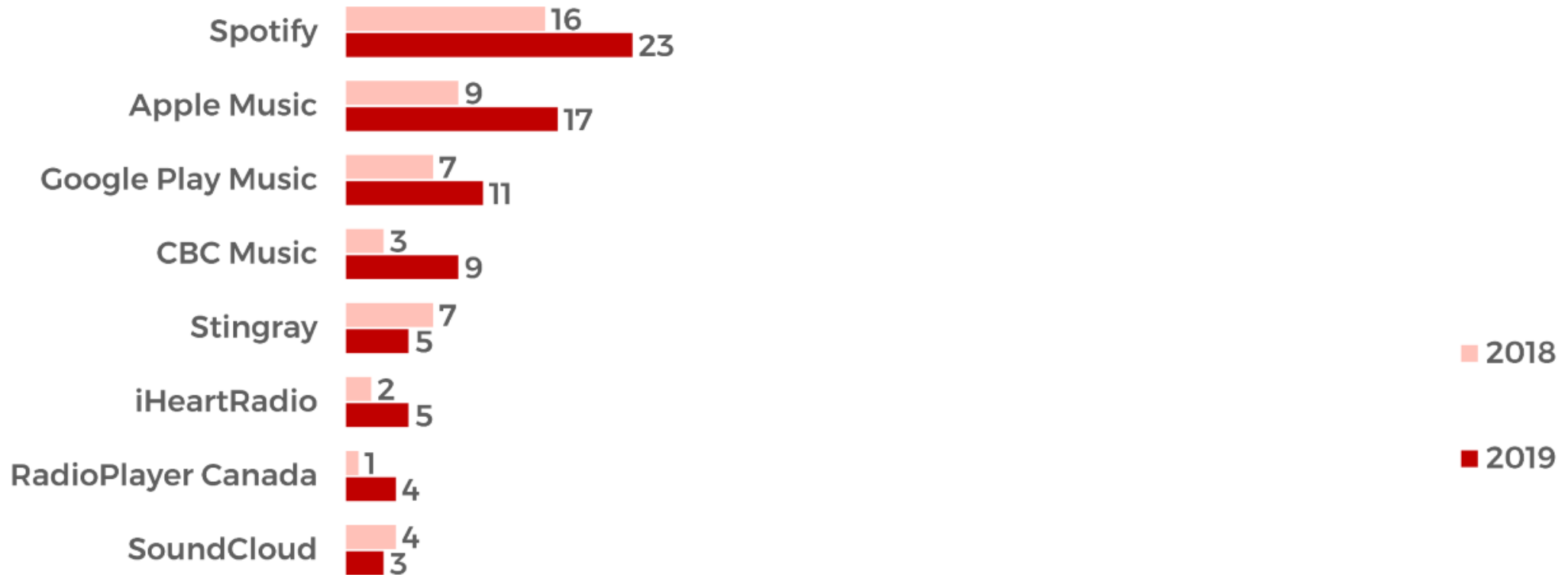
% LISTENED TO ONLINE AUDIO BRAND IN LAST MONTH



Weekly Online Audio Listening

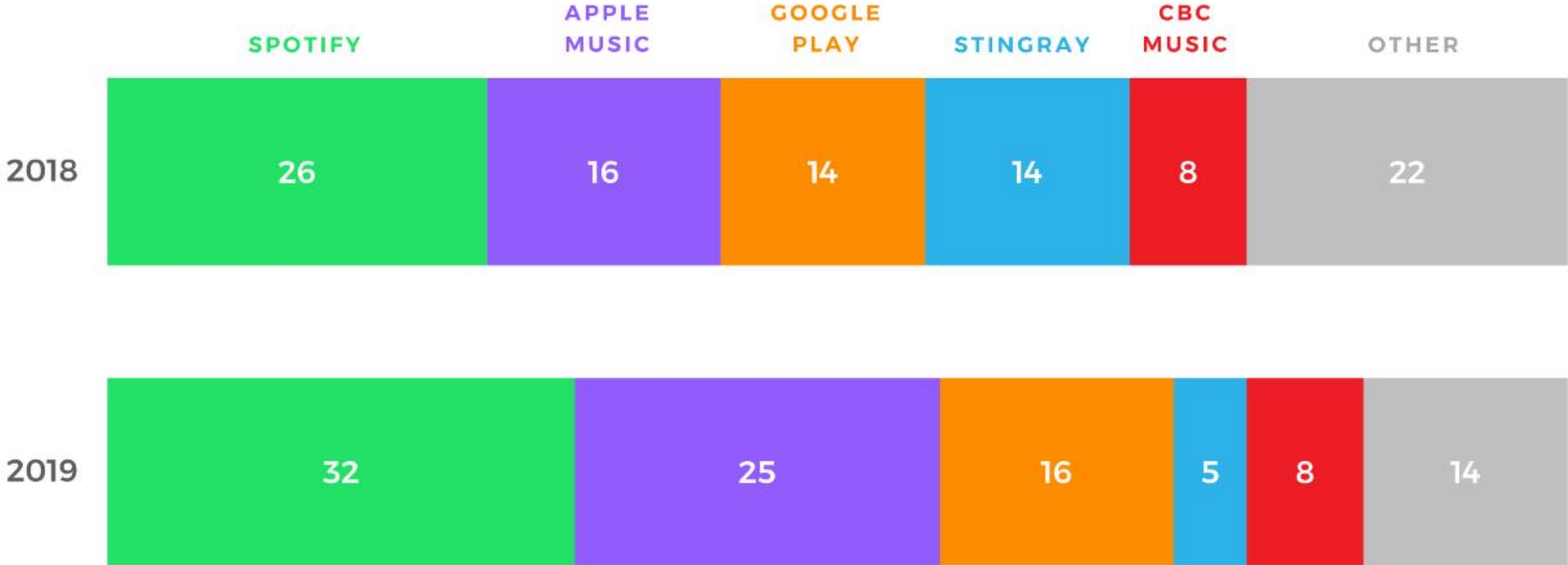
TOTAL CANADIAN POPULATION 18+

% LISTENED TO ONLINE AUDIO BRAND IN LAST WEEK



Audio Brand Used Most Often

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



Weekly YouTube Music Usage in Canada

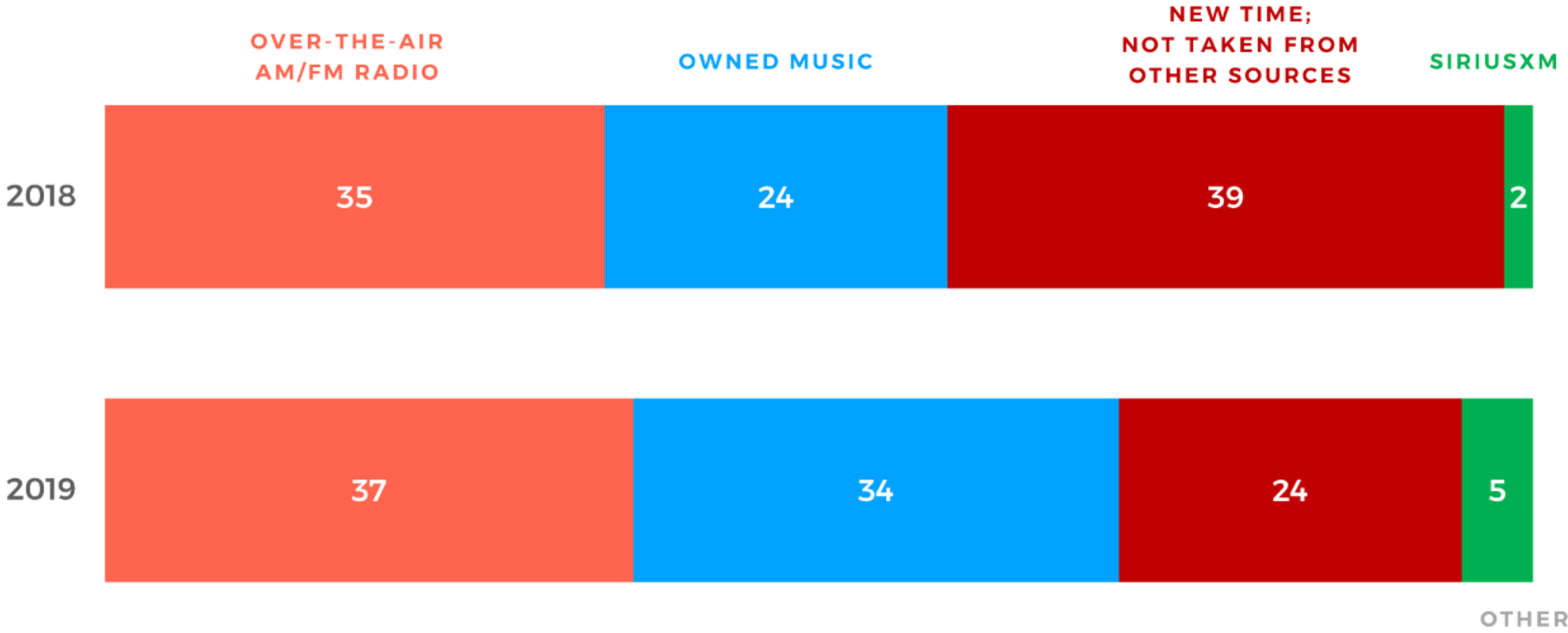
TOTAL CANADIAN POPULATION 18+

% USED YOUTUBE FOR MUSIC OR MUSIC VIDEOS IN LAST WEEK



What is Time Spent with Online Audio Replacing?

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



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In-Car Audio



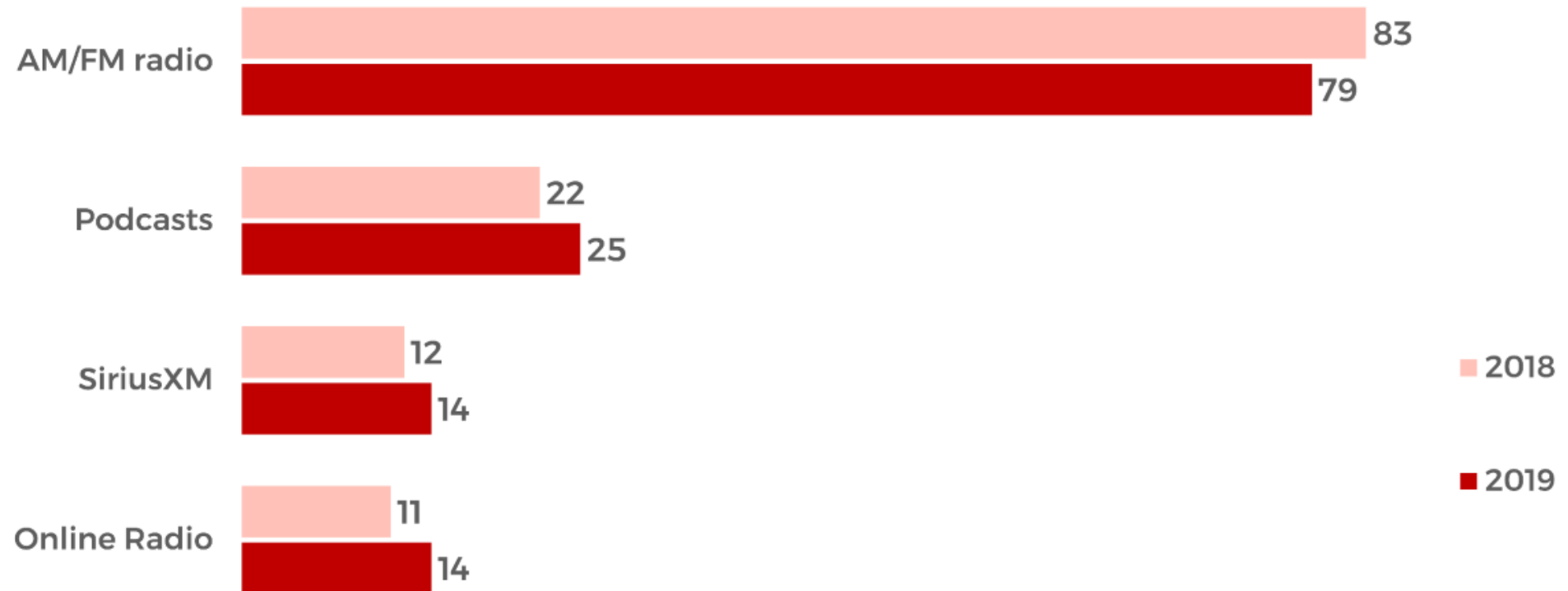
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Audio Sources Used in Car

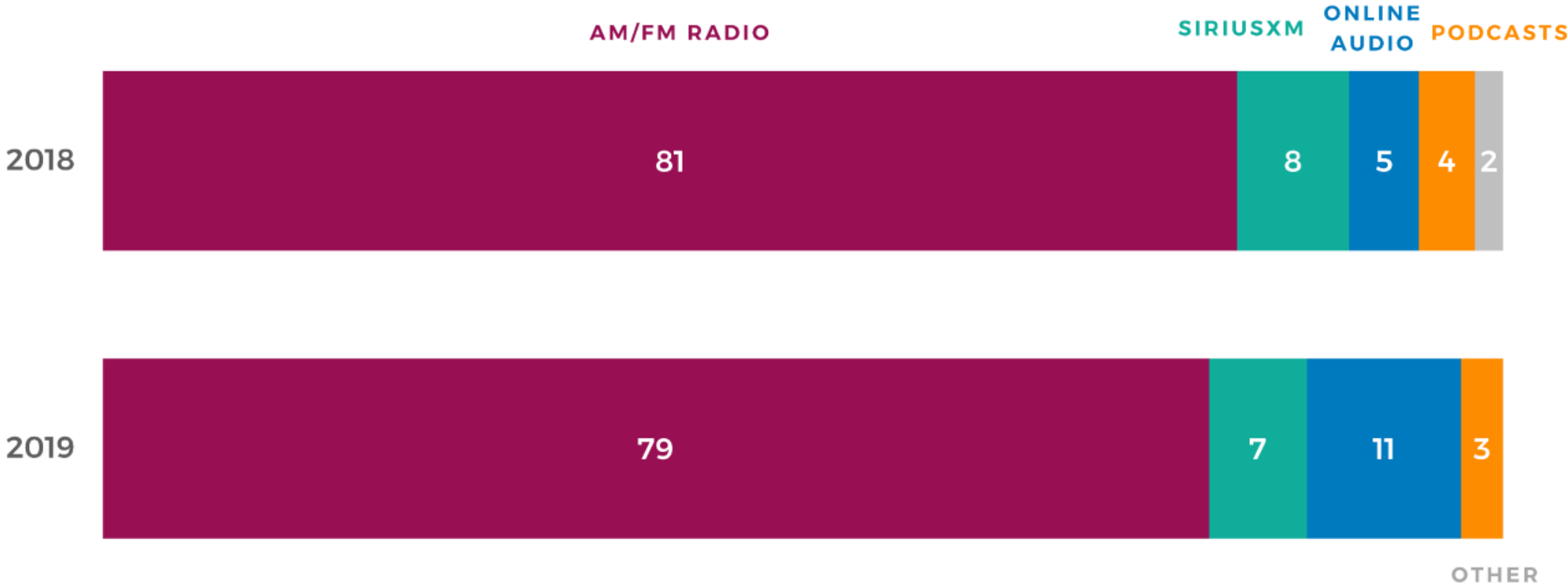
BASE: CANADIAN 18+ AND HAS DRIVEN/RIDDEN IN CAR IN LAST MONTH; 85%

% USING AUDIO SOURCE IN CAR



Audio Source Used Most Often in Car

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



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





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Podcasting



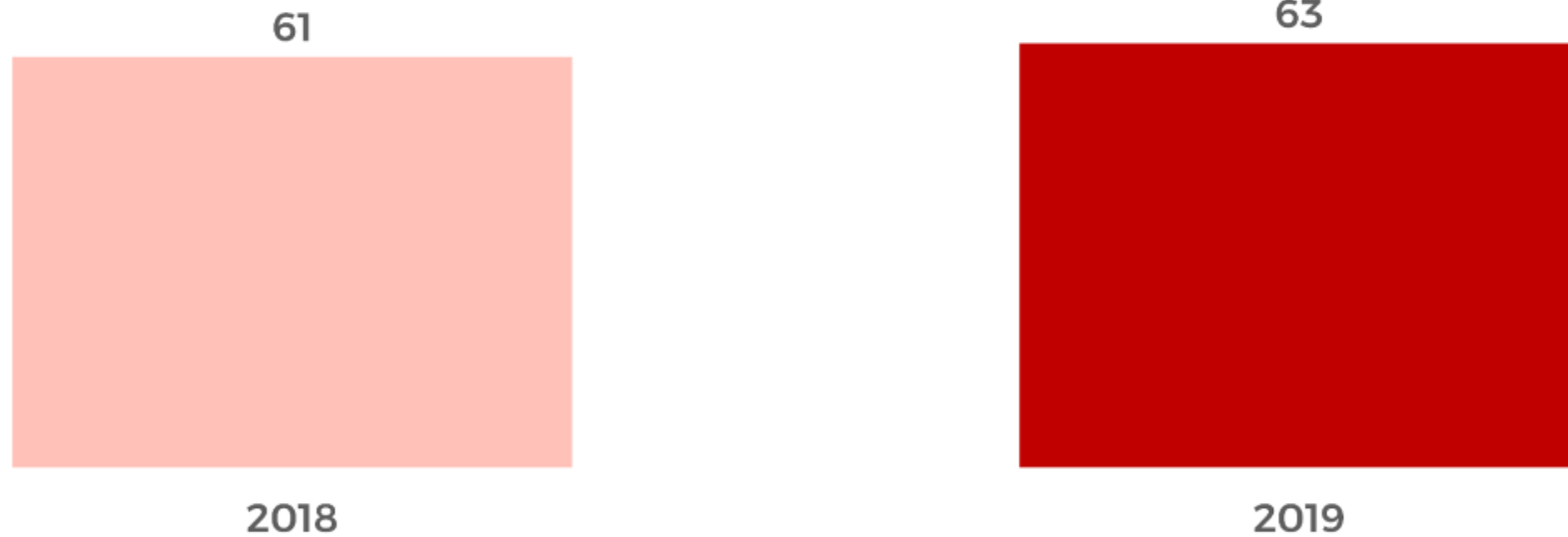
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Podcasting Familiarity

TOTAL CANADIAN POPULATION 18+

% FAMILIAR WITH THE TERM "PODCASTING"



Monthly Podcast Listening

TOTAL CANADIAN POPULATION 18+

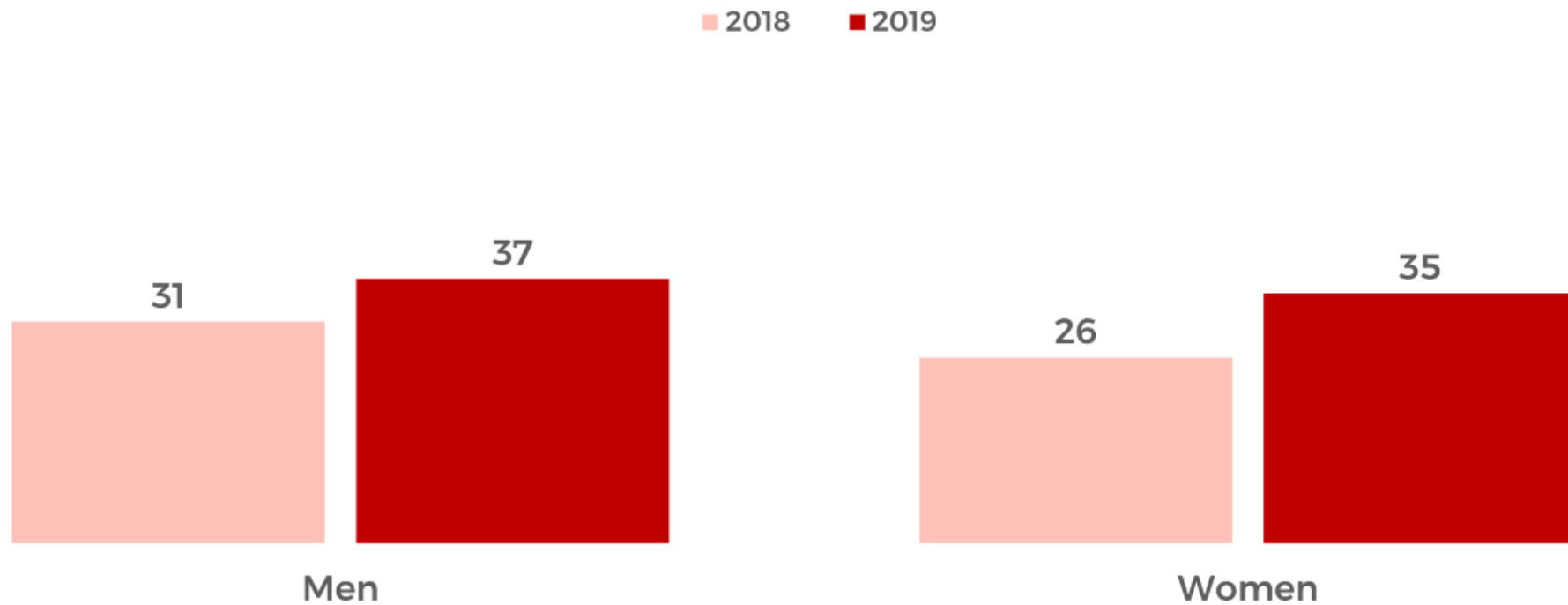
% LISTENED TO A PODCAST IN LAST MONTH



Monthly Podcast Listening

CANADIAN POPULATION

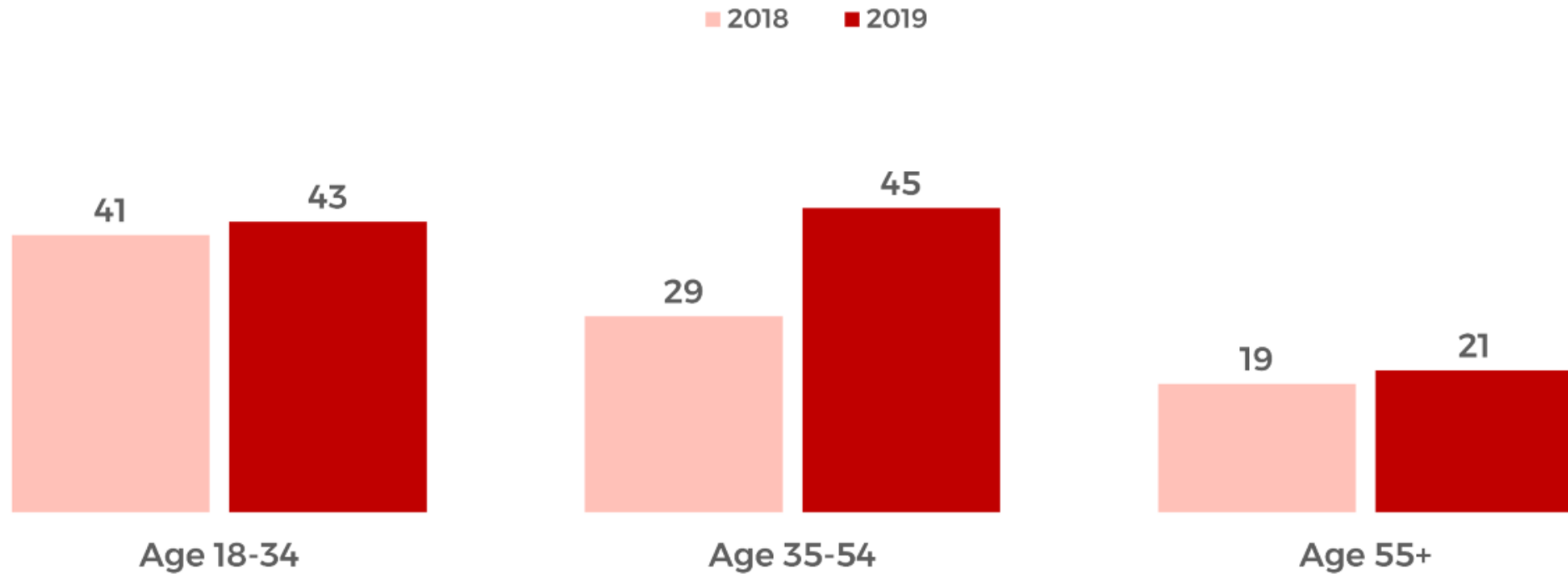
% LISTENED TO A PODCAST IN LAST MONTH



Monthly Podcast Listening

CANADIAN POPULATION

% LISTENED TO A PODCAST IN LAST MONTH



Weekly Podcast Listening

TOTAL CANADIAN POPULATION 18+

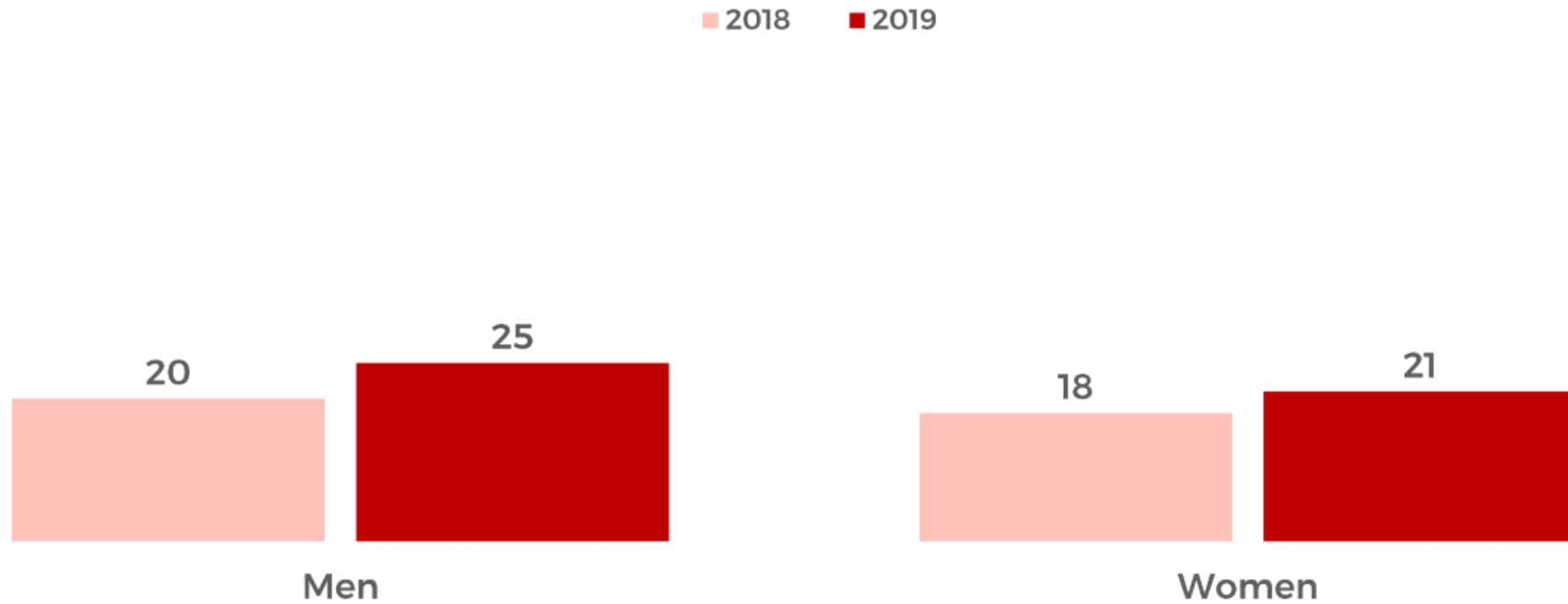
% LISTENED TO A PODCAST IN LAST WEEK



Weekly Podcast Listening

CANADIAN POPULATION

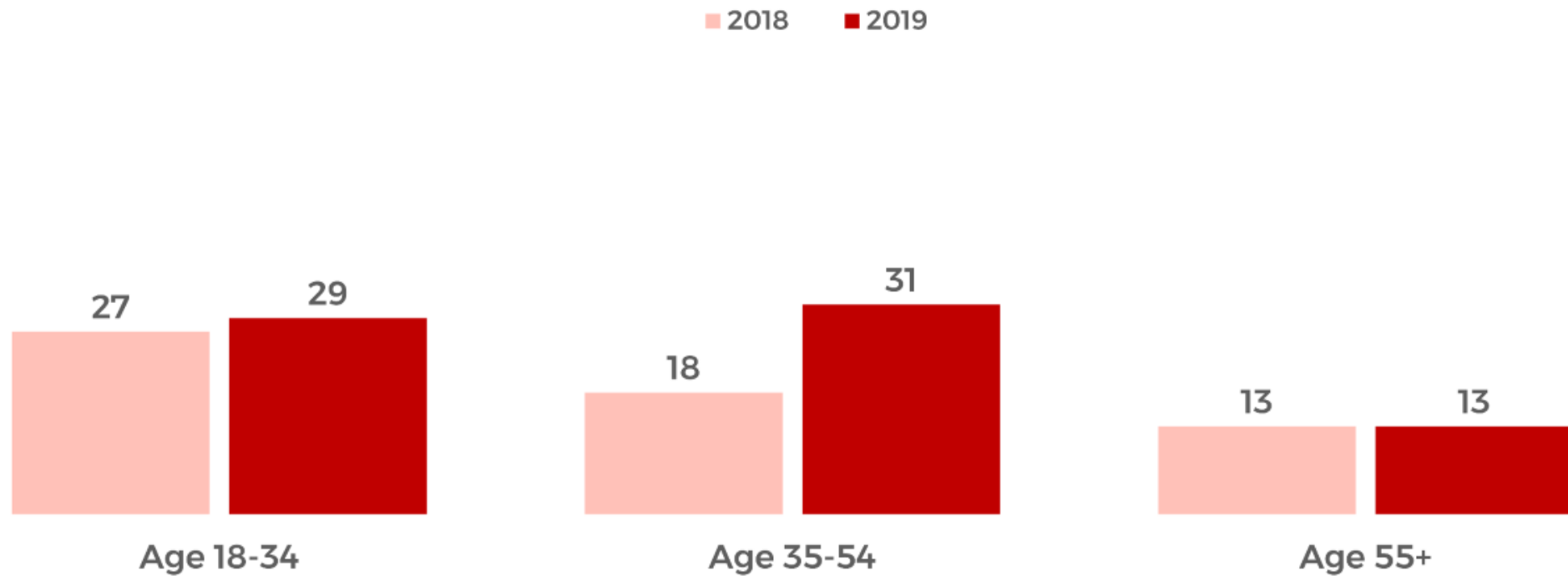
% LISTENED TO A PODCAST IN LAST WEEK



Weekly Podcast Listening

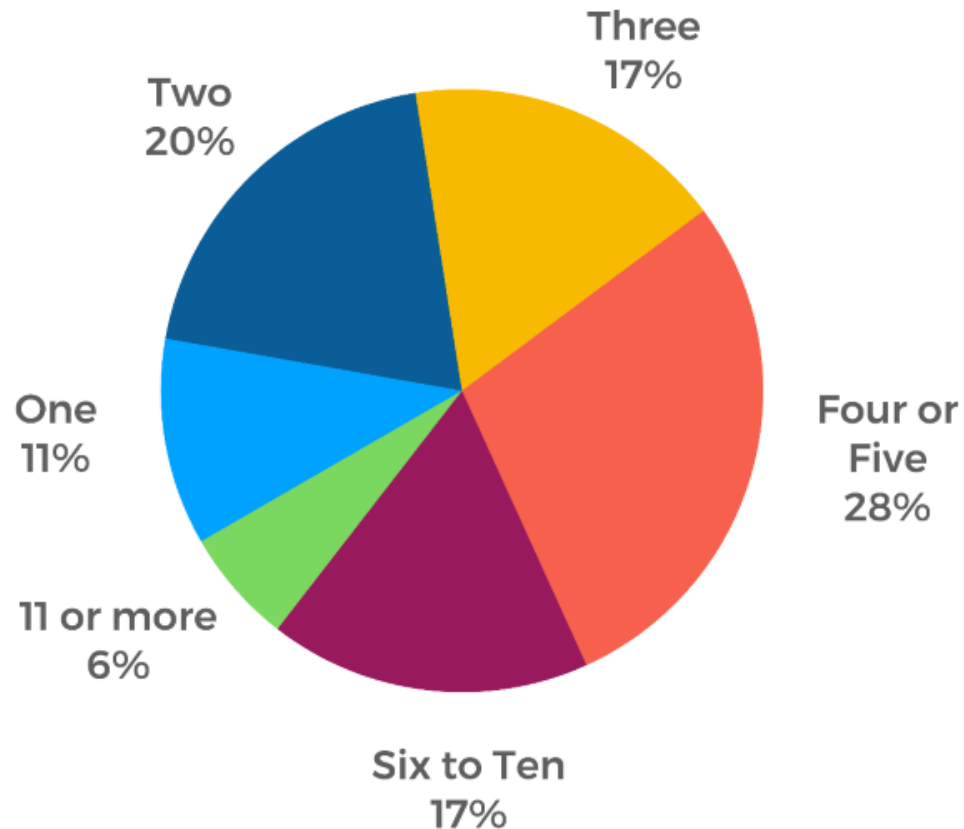
CANADIAN POPULATION

% LISTENED TO A PODCAST IN LAST WEEK



Number of Podcasts Listened to in Last Week

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



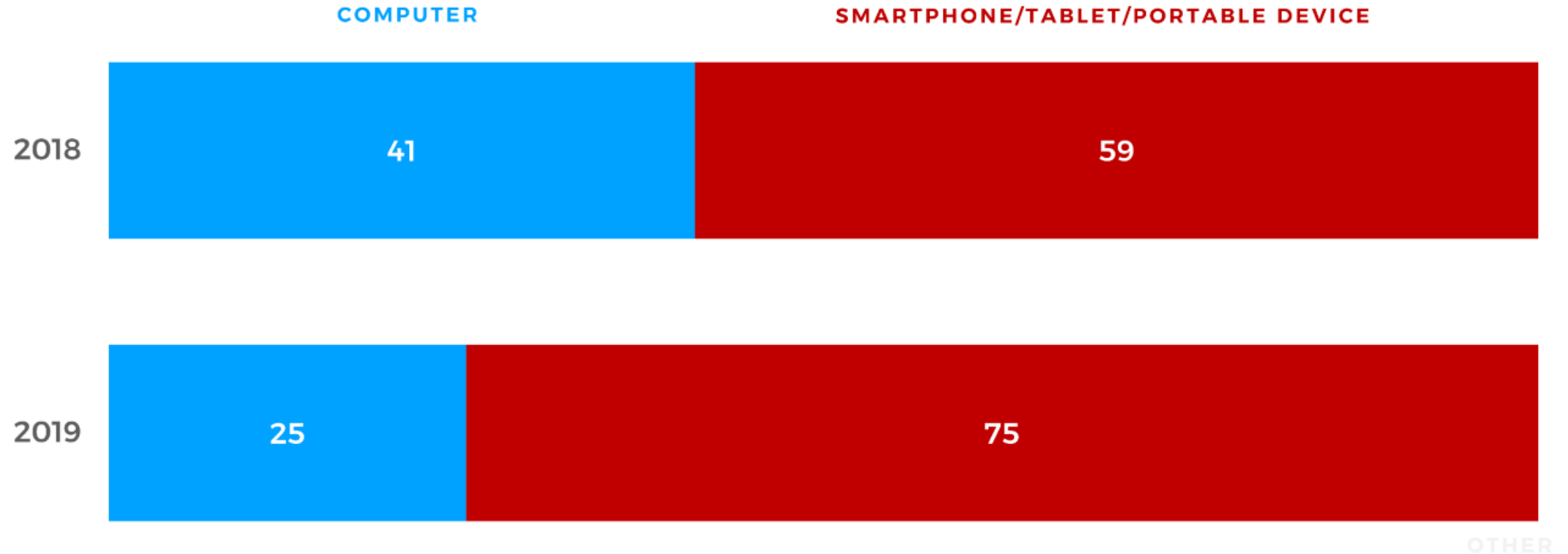
Canadian weekly podcast listeners averaged

five podcasts

in the last week

Device Used Most Often to Listen to Podcasts

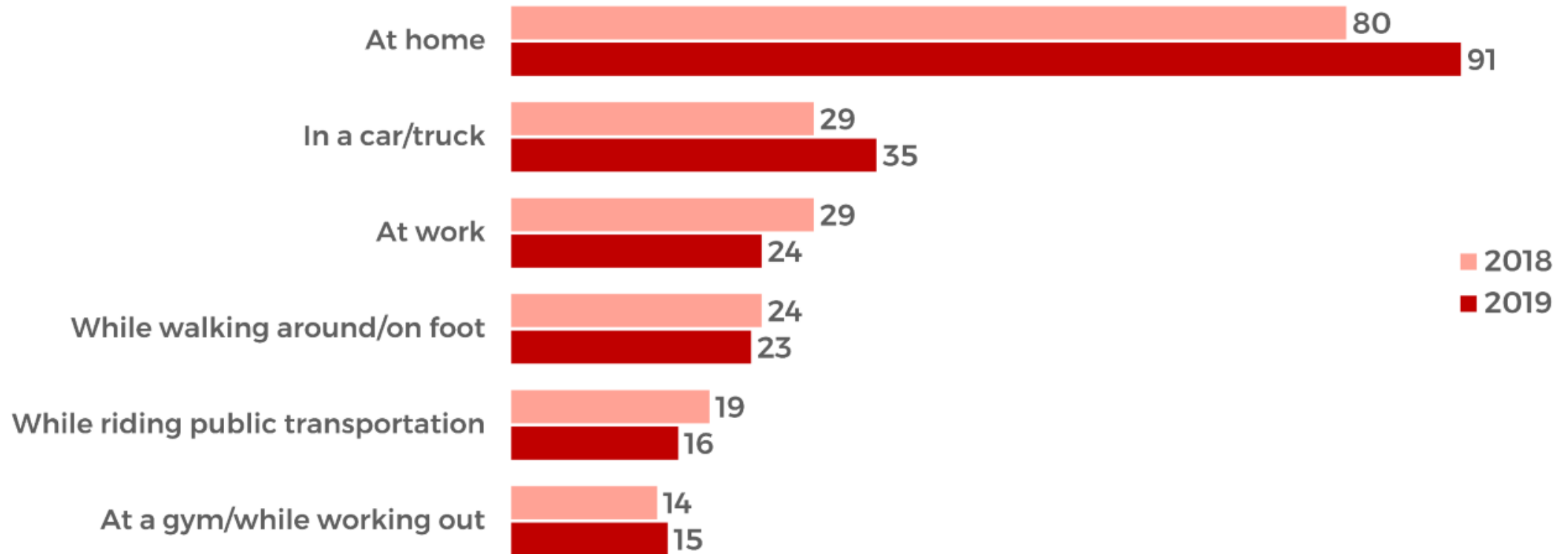
BASE: CANADIAN 18+ AND EVER LISTENED TO A PODCAST



Podcast Listening Locations

BASE: CANADIAN 18+ AND EVER LISTENED TO A PODCAST

% LISTENED 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



Increasing Podcast Playback Speed

BASE: CANADIAN 18+ AND EVER LISTENED TO A PODCAST

% WHO INCREASE SPEED OF PODCASTS

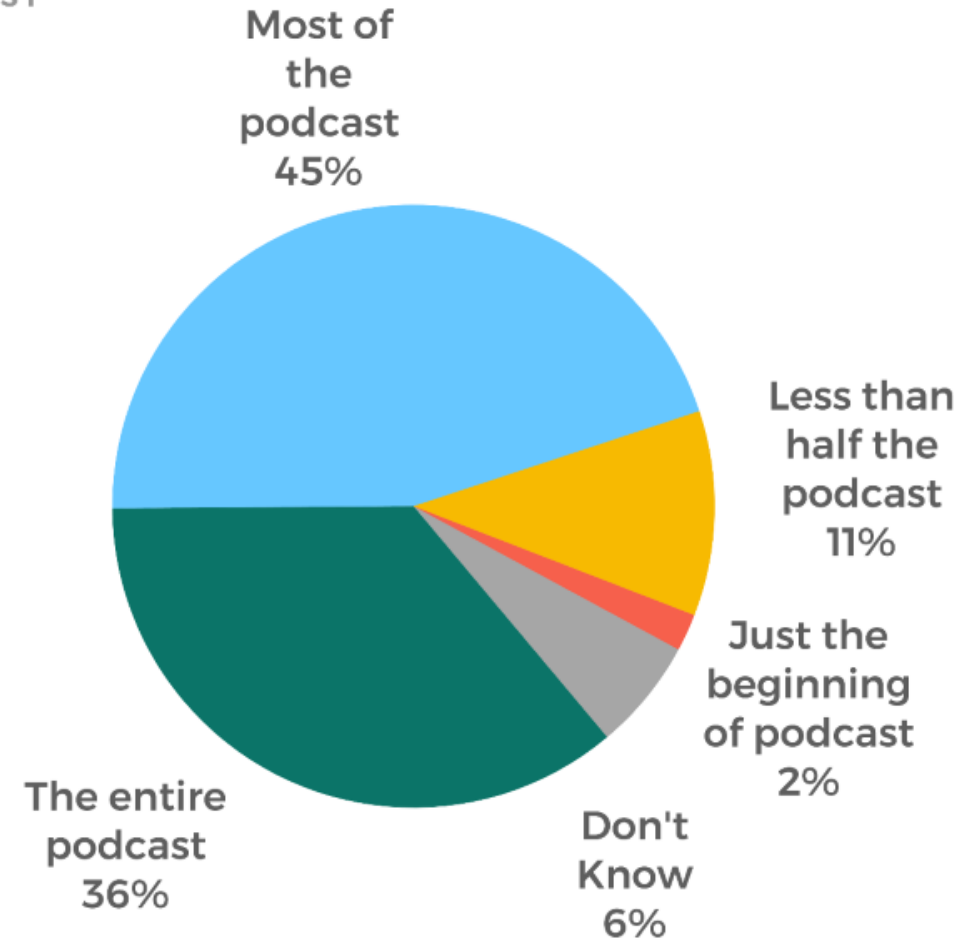
“Do you ever increase the speed of your podcasts in order to listen to them faster?”



Amount of Podcast Episode Listened to

BASE: CANADIAN 18+ AND EVER LISTENED TO A PODCAST

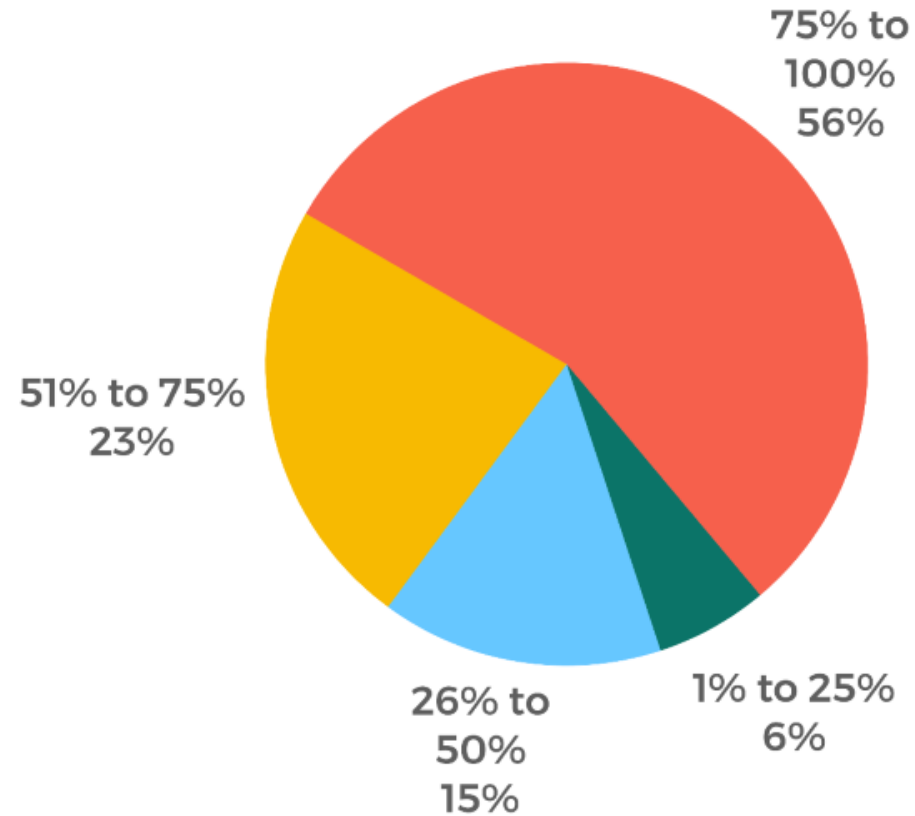
“Think about the audio podcast episodes you listen to. Do you typically listen to...?”



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?”



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

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