The Infinite Dial 2020
Canada
#InfiniteDial
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.
Smartphone Ownership

TOTAL POPULATIONS 18+

% OWNED A SMARTPHONE

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<td>79</td>
<td>82</td>
<td>83</td>
<td>84</td>
<td>86</td>
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Tablet Ownership

TOTAL POPULATIONS 18+

% OWNING A TABLET

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<td>53</td>
<td>48</td>
<td>54</td>
<td>53</td>
<td>46</td>
</tr>
</tbody>
</table>
Smart Speaker Awareness

TOTAL POPULATIONS 18+
% AWARE OF SMART SPEAKER BRAND

Google Home
- Can 2020: 56%
- U.S. 2020: 74%

Amazon Alexa
- Can 2020: 65%
- U.S. 2020: 70%

Apple HomePod
- Can 2020: 41%
- U.S. 2020: 36%

Heard of any of the above
- Can 2020: 77%
- U.S. 2020: 80%
Smart Speaker Awareness

Germany 2019: 65%
South Africa 2019: 23%
U.S. 2020: 80%
Australia 2020: 85%
Canada 2020: 77%

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

- Google Home: Can 2020 - 14%, U.S. 2020 - 10%
- Amazon Alexa: Can 2020 - 11%, U.S. 2020 - 19%
- Apple HomePod: Can 2020 - 3%, U.S. 2020 - 1%

Own any of the above: Can 2020 - 26%, U.S. 2020 - 24%
Smart Speaker Ownership

Germany, South Africa Major Metro Commercial, U.S., Australia, and Canada Populations Age 18+

% Own Any Smart Speaker Brand

<table>
<thead>
<tr>
<th>Country</th>
<th>Year</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>Germany</td>
<td>2019</td>
<td>8</td>
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<tr>
<td>South Africa</td>
<td>2019</td>
<td>12</td>
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<td>U.S.</td>
<td>2020</td>
<td>24</td>
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<tr>
<td>Australia</td>
<td>2020</td>
<td>17</td>
</tr>
<tr>
<td>Canada</td>
<td>2020</td>
<td>26</td>
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</table>
Number of Smart Speakers in Household

BASE: CANADIAN AGE 18+ SMART SPEAKER OWNERS

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<thead>
<tr>
<th></th>
<th>ONE</th>
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<th>THREE OR MORE</th>
<th>MEAN # OF SMART SPEAKERS</th>
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<tr>
<td>Can 2020</td>
<td>58</td>
<td>25</td>
<td>17</td>
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<td>U.S. 2020</td>
<td>45</td>
<td>24</td>
<td>31</td>
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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

<table>
<thead>
<tr>
<th>Year</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>U.S. 2014</td>
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<td>U.S. '15</td>
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<td>U.S. '16</td>
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<td>U.S. 2020</td>
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<tr>
<td>Can 2020</td>
<td>69</td>
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</table>
Online Audio
Listening to AM/FM Radio Online in Last Month

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

- U.S. 2014: 12%
- U.S. '15: 17%
- U.S. '16: 17%
- U.S. '17: 18%
- U.S. '18: 17%
- U.S. '19: 19%
- U.S. 2020: 19%
- Can 2020: 21%
Listening to AM/FM Radio Online in Last Week

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

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</tbody>
</table>
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

<table>
<thead>
<tr>
<th>Year</th>
<th>% Listened</th>
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<tbody>
<tr>
<td>U.S. 2009</td>
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<td>U.S. 2020</td>
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<td>Can 2020</td>
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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.

<table>
<thead>
<tr>
<th>Country</th>
<th>Year</th>
<th>% Listened</th>
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<td>Germany</td>
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<td>U.S.</td>
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<td>Australia</td>
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<td>Canada</td>
<td>2020</td>
<td>70</td>
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</tbody>
</table>
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

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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

<table>
<thead>
<tr>
<th>Country</th>
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<tr>
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<td>South Africa</td>
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<td>U.S.</td>
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<td>Australia</td>
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<tr>
<td>Canada</td>
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Audio Brand Awareness

TOTAL CANADIAN POPULATION 18+

% AWARE OF AUDIO BRAND

- Apple Music: 79%
- Spotify: 77%
- Google Play Music: 75%
- Amazon Music: 54%
- iHeartRadio: 52%
- SoundCloud: 50%
- Yahoo Music: 31%
- Stingray: 30%
- Radioplayer Canada: 29%
- Last.fm: 18%
- TuneIn: 17%
- Tidal: 14%
- Deezer: 11%
- eMusic: 11%
- LiveXLive, formerly Slacker: 9%
Listened to Online Audio Brand in Last Month

TOTAL POPULATIONS 18+

% LISTENED TO ONLINE AUDIO BRAND IN LAST MONTH

- **Spotify**: 28 (Can 2020), 22 (U.S. 2020)
- **Apple Music**: 13 (Can 2020), 11 (U.S. 2020)
- **Google Play Music**: 11 (Can 2020), 9 (U.S. 2020)
- **SoundCloud**: 10 (Can 2020), 7 (U.S. 2020)
- **iHeartRadio**: 7 (Can 2020), 12 (U.S. 2020)
- **Amazon Music**: 7 (Can 2020), 15 (U.S. 2020)
Audio Brand Used Most Often

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

Can 2020
- Spotify: 37
- Apple Music: 14
- Google Play: 10
- Stingray: 8
- CBC Music: 9
- Other: 22

U.S. 2020
- Spotify: 25
- Apple Music: 13
- Google Play: 7
- Pandora: 26
- Amazon Music: 9
- Other: 20
What is Time Spent with Online Audio Mostly Replacing?

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

- Over-the-air AM/FM radio: 34%
- Owned music: 30%
- New time; not taken from other sources: 32%
- Sirius XM: 4%
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

- AM/FM radio: 78% (Can 2020) vs. 81% (U.S. 2020)
- Podcasts: 27% (Can 2020) vs. 28% (U.S. 2020)
- Online Radio: 18% (Can 2020) vs. 33% (U.S. 2020)
- SiriusXM: 13% (Can 2020) vs. 24% (U.S. 2020)
Audio Source Used Most Often in Car

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

Can 2020

AM/FM RADIO: 57
OWNED MUSIC: 25
SIRIUSXM: 7
ONLINE AUDIO: 4
PODCASTS: 4
OTHER: 3

U.S. 2020

AM/FM RADIO: 50
OWNED MUSIC: 20
SIRIUSXM: 12
ONLINE AUDIO: 11
PODCASTS: 4
OTHER: 3

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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

U.S. 2013: 6
U.S. ’14: 8
U.S. ’15: 10
U.S. ’16: 12
U.S. ’17: 12
U.S. ’18: 15
U.S. ’19: 19
U.S. 2020: 18
Can 2020: 23

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Podcasting
Podcasting Familiarity

TOTAL POPULATIONS 18+

% FAMILIAR WITH THE TERM "PODCASTING"

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<td>64</td>
<td>70</td>
<td>75</td>
<td>74</td>
</tr>
</tbody>
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Monthly Podcast Listening

TOTAL POPULATIONS 18+
% LISTENED TO A PODCAST IN LAST MONTH

U.S. 2009: 11
U.S. '10: 13
U.S. '11: 12
U.S. '12: 14
U.S. '13: 12
U.S. '14: 14
U.S. '15: 16
U.S. '16: 20
U.S. '17: 24
U.S. '18: 25
U.S. '19: 32
U.S. 2020: 37
Can 2020: 37
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

Germany 2019: 16%
South Africa 2019: 10%
U.S. 2020: 37%
Australia 2020: 26%
Canada 2020: 37%
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+

- Age 18-34: 29%
- Age 35-54: 34%
- Age 55+: 37%

MONTHLY PODCAST CONSUMERS 18+

- Age 18-34: 35%
- Age 35-54: 41%
- Age 55+: 24%
Weekly Podcast Listening

TOTAL POPULATIONS 18+

% LISTENED TO A PODCAST IN LAST WEEK

U.S. 2013: 7
U.S. '14: 8
U.S. '15: 9
U.S. '16: 13
U.S. '17: 16
U.S. '18: 17
U.S. '19: 22
U.S. 2020: 23
Can 2020: 24
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

- Germany 2019: 9%
- South Africa 2019: 6%
- U.S. 2020: 23%
- Australia 2020: 18%
- Canada 2020: 24%
Number of Podcasts Listened to in Last Week

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

- Three: 27%
- Two: 16%
- One: 9%
- Four or Five: 15%
- Six to Ten: 22%
- 11 or more: 11%

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

Computer 26%

Smartphone/ Tablet/ Portable Device 74%

OTHER
Podcast Listening Locations

BASE: CANADIAN 18+ AND EVER LISTENED TO A PODCAST

% EVER LISTEN TO A PODCAST IN LOCATION

- At home: 81%
- In a car/truck: 40%
- While walking around/on foot: 34%
- At a gym/while working out: 27%
- While riding public transportation: 25%
- At work: 20%

#InfiniteDial
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

Yes 50%
No 50%
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...?”

- Most of the podcast: 35%
- Less than half the podcast: 12%
- Just the beginning of podcast: 12%
- The entire podcast: 45%
- Don’t Know: 4%

#InfiniteDial
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?”

- 75% to 100%: 50%
- 51% to 75%: 24%
- 26% to 50%: 15%
- 1% to 25%: 11%

#InfiniteDial
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.
The Infinite Dial 2020
Canada
#InfiniteDial