



The Infinite Dial Canada 2021

#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 , 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

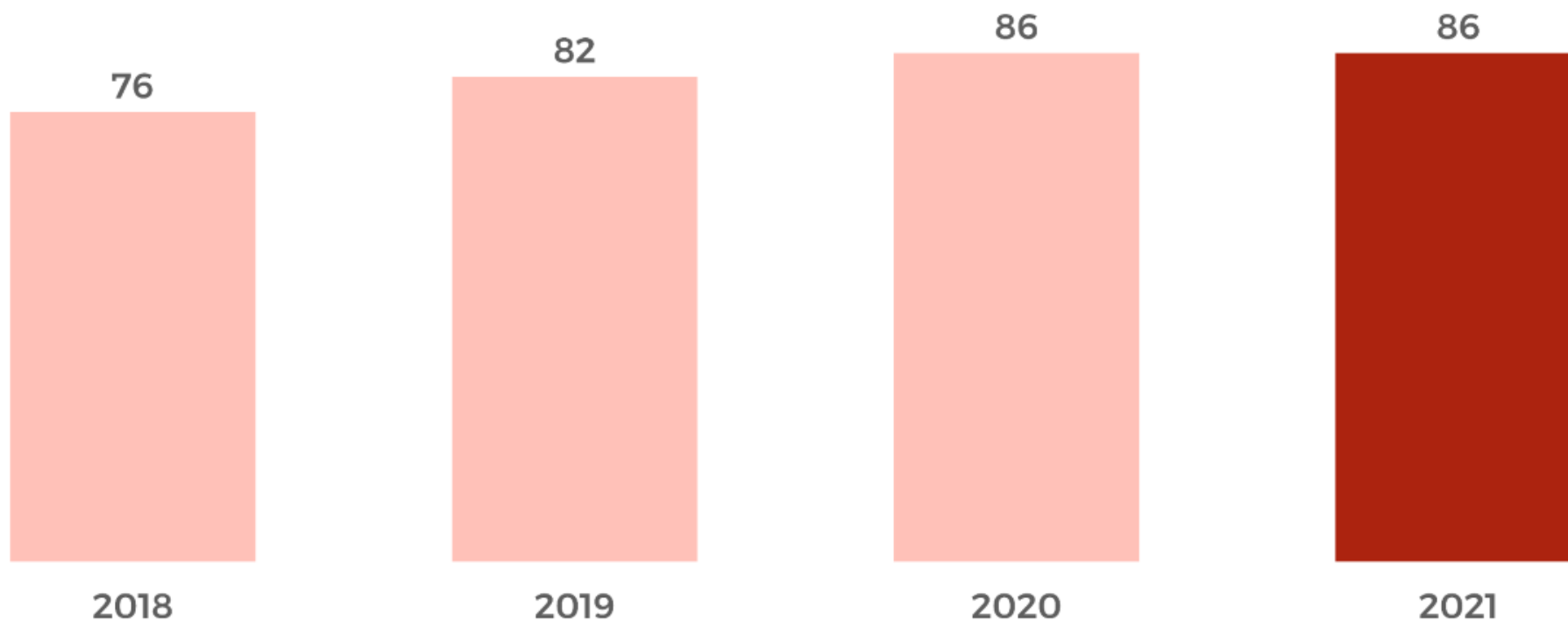
- ▶ In February 2021, Edison Research conducted a national telephone survey of 1,001 people aged 18 and older, using random digital dialing techniques to both mobile phones and landlines
- ▶ Survey offered in both English and French
- ▶ Data weighted to national 18+ population figures

Media & Technologies

Smartphone Ownership

TOTAL CANADIAN POPULATION 18+

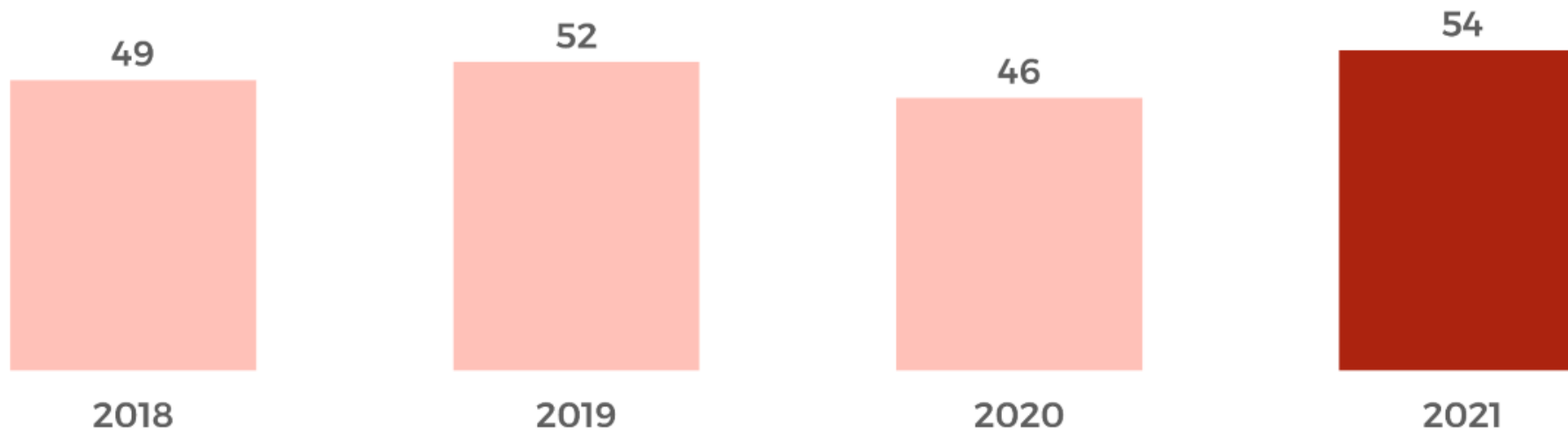
% OWNING A SMARTPHONE



Tablet Ownership

TOTAL CANADIAN POPULATION 18+

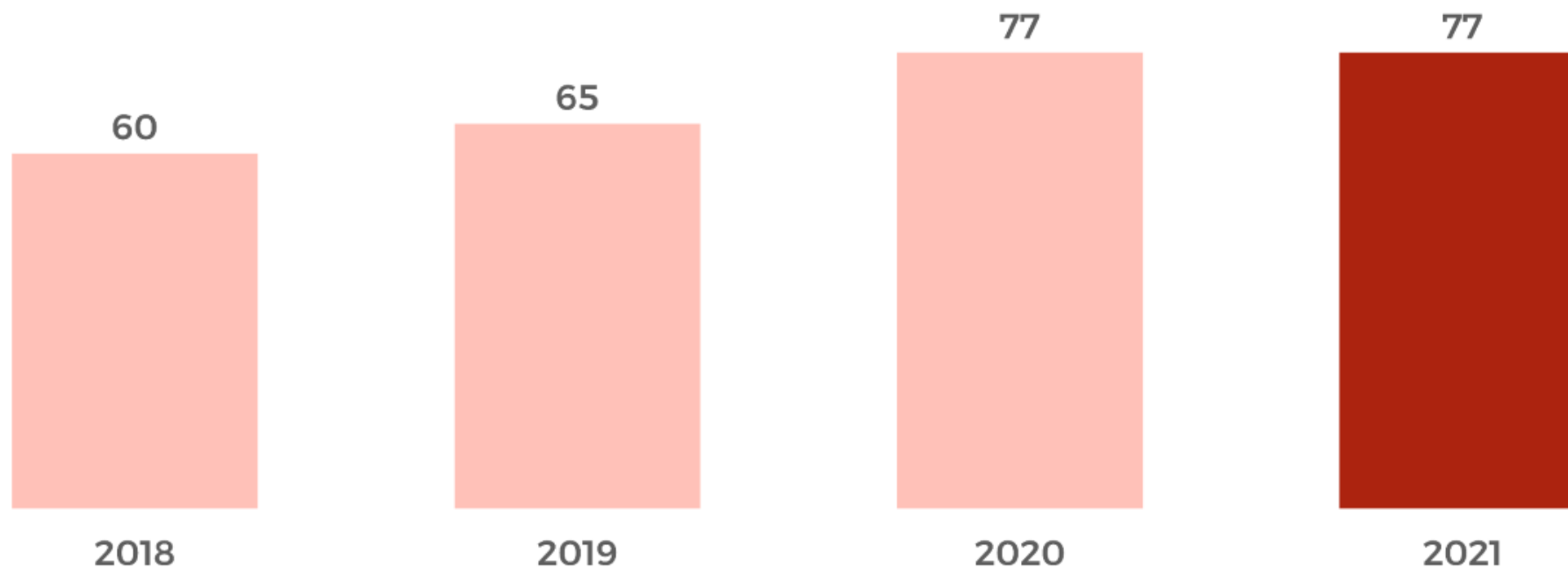
% OWNING A TABLET



Smart Speaker Awareness

TOTAL CANADIAN POPULATION 18+

% AWARE OF SMART SPEAKERS



Smart Speaker Ownership

TOTAL CANADIAN POPULATION 18+

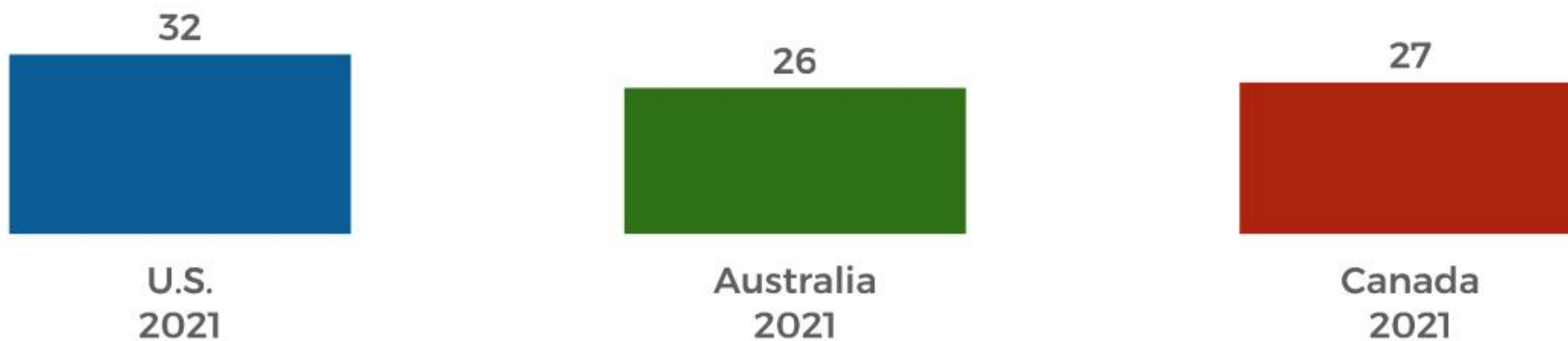
% OWN ANY SMART SPEAKER



Smart Speaker Ownership

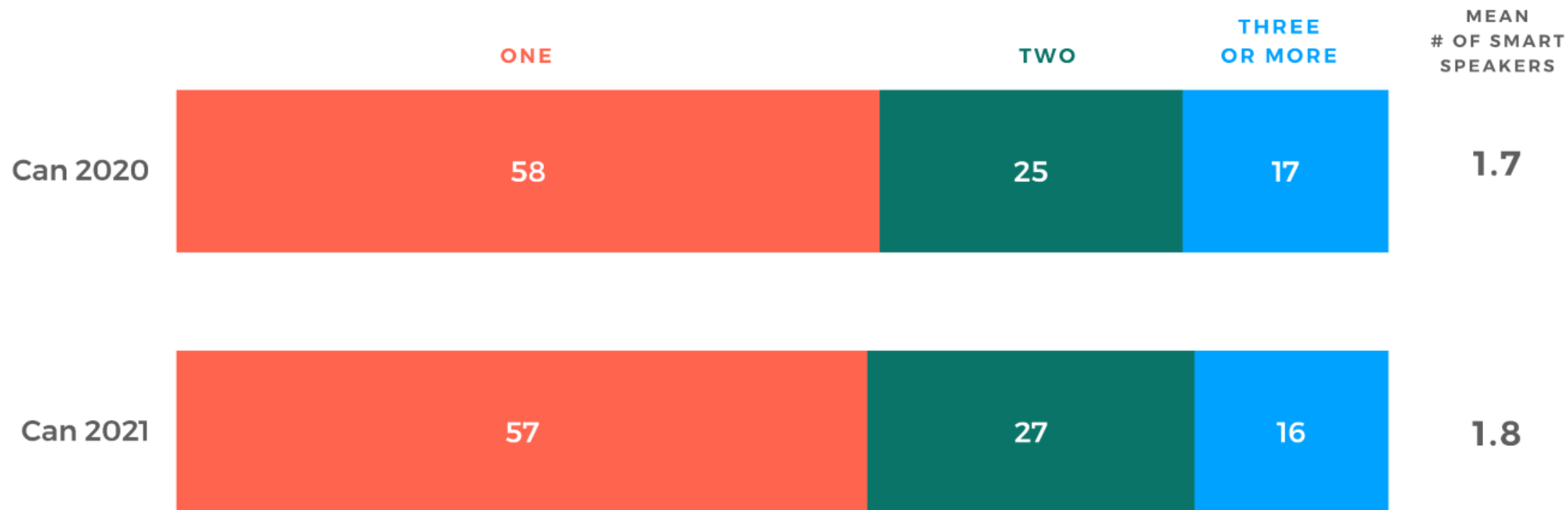
POPULATIONS 18+

% OWN ANY SMART SPEAKER



Number of Smart Speakers in Household

BASE: CANADIAN AGE 18+ SMART SPEAKER OWNERS



 THE INFINITE DIAL® 2021

Online Audio



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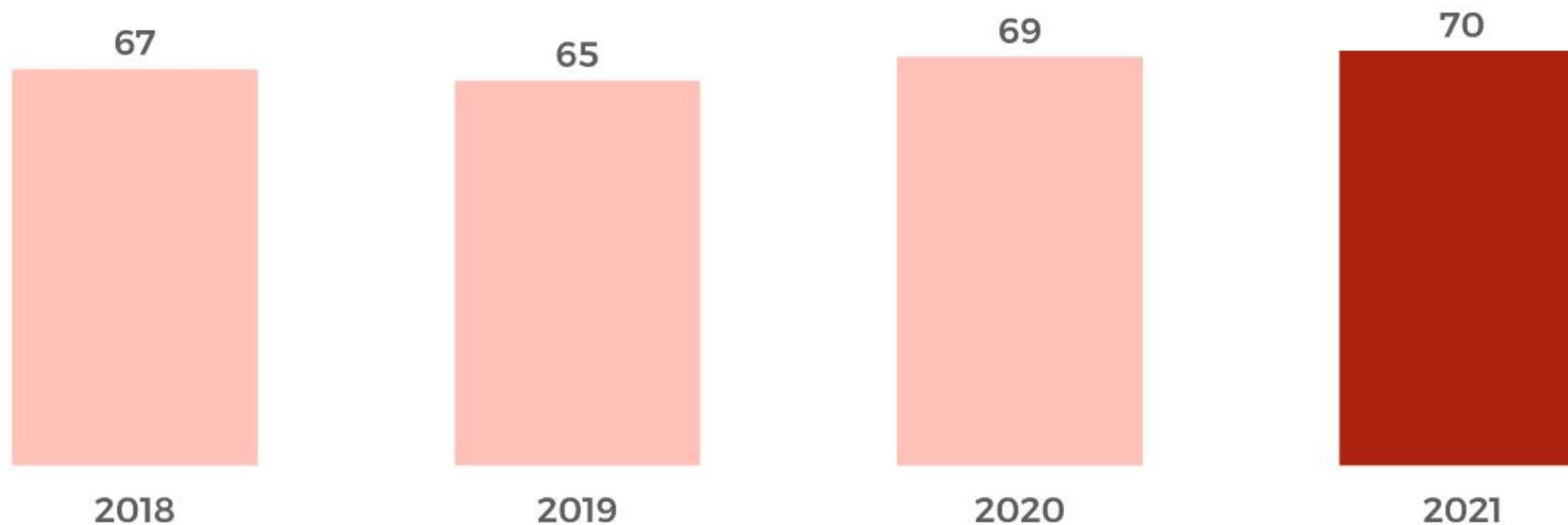
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Listening to AM/FM Radio in the Last Week

TOTAL CANADIAN POPULATION 18+

% LISTENED TO AM/FM RADIO IN LAST WEEK

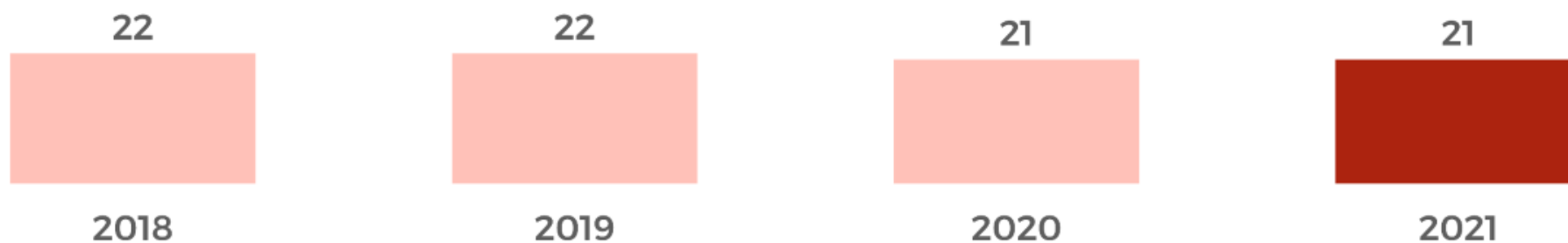
AM/FM RADIO = LISTENING TO "OVER-THE-AIR" AM/FM RADIO AND/OR AM/FM RADIO STATIONS ONLINE



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

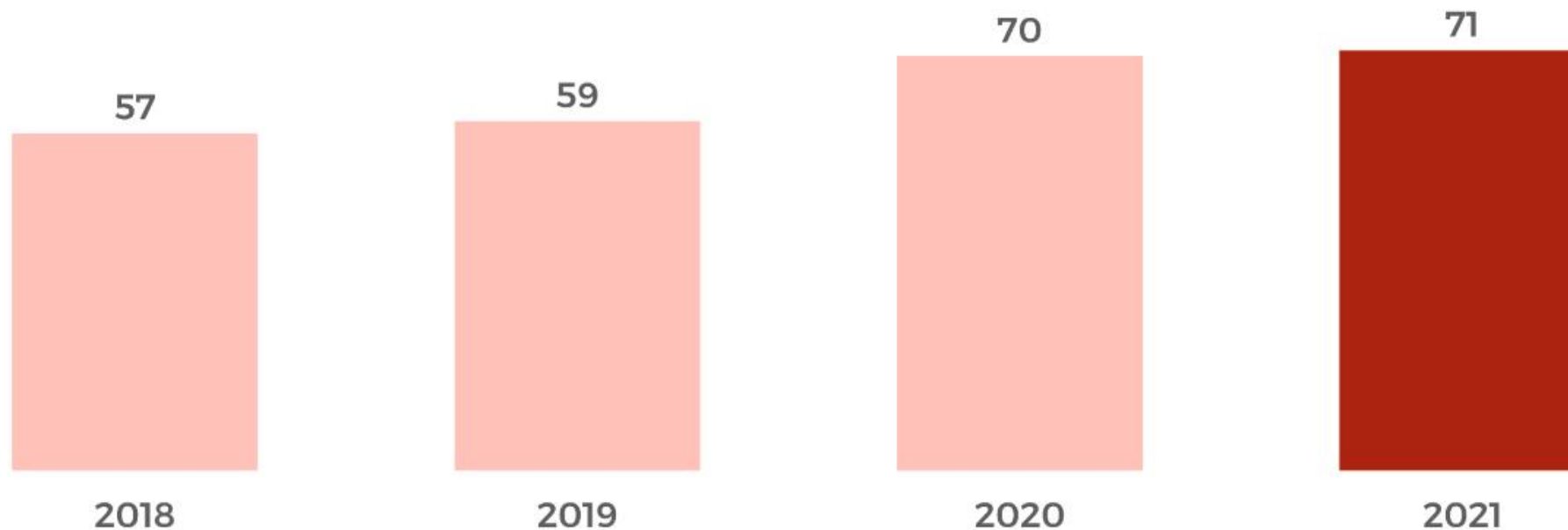


Monthly Online Audio Listening

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

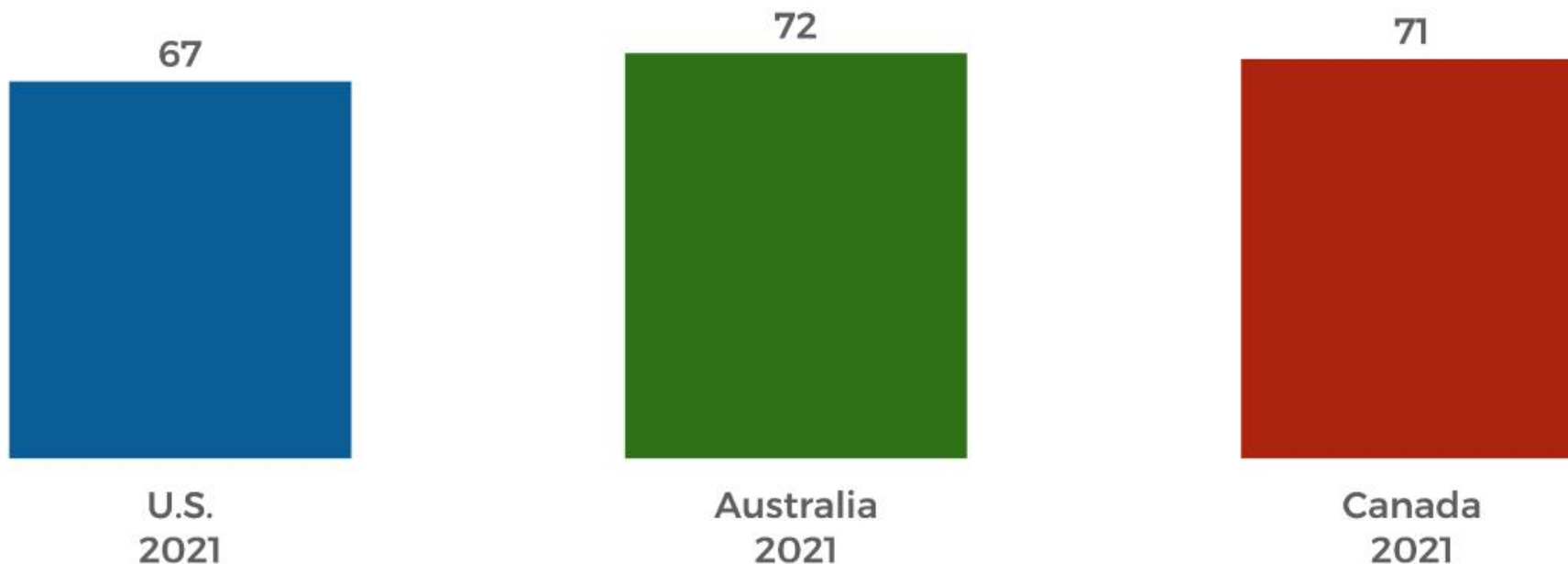


Monthly Online Audio Listening

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

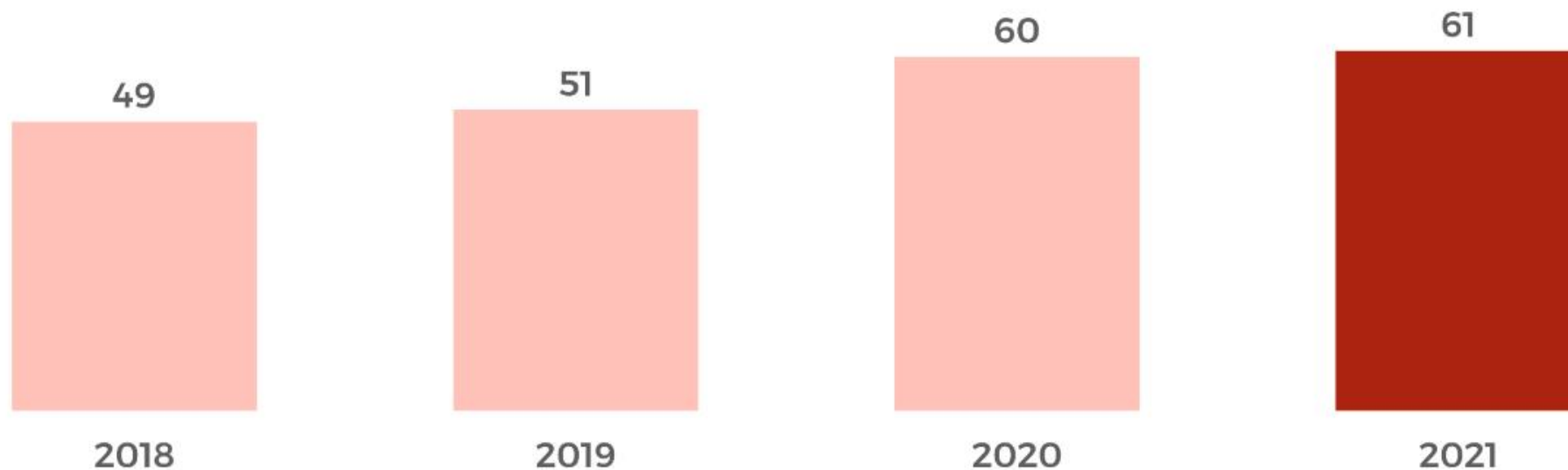


Weekly Online Audio Listening

TOTAL CANADIAN POPULATION 18+

% LISTENED TO ONLINE AUDIO IN LAST WEEK

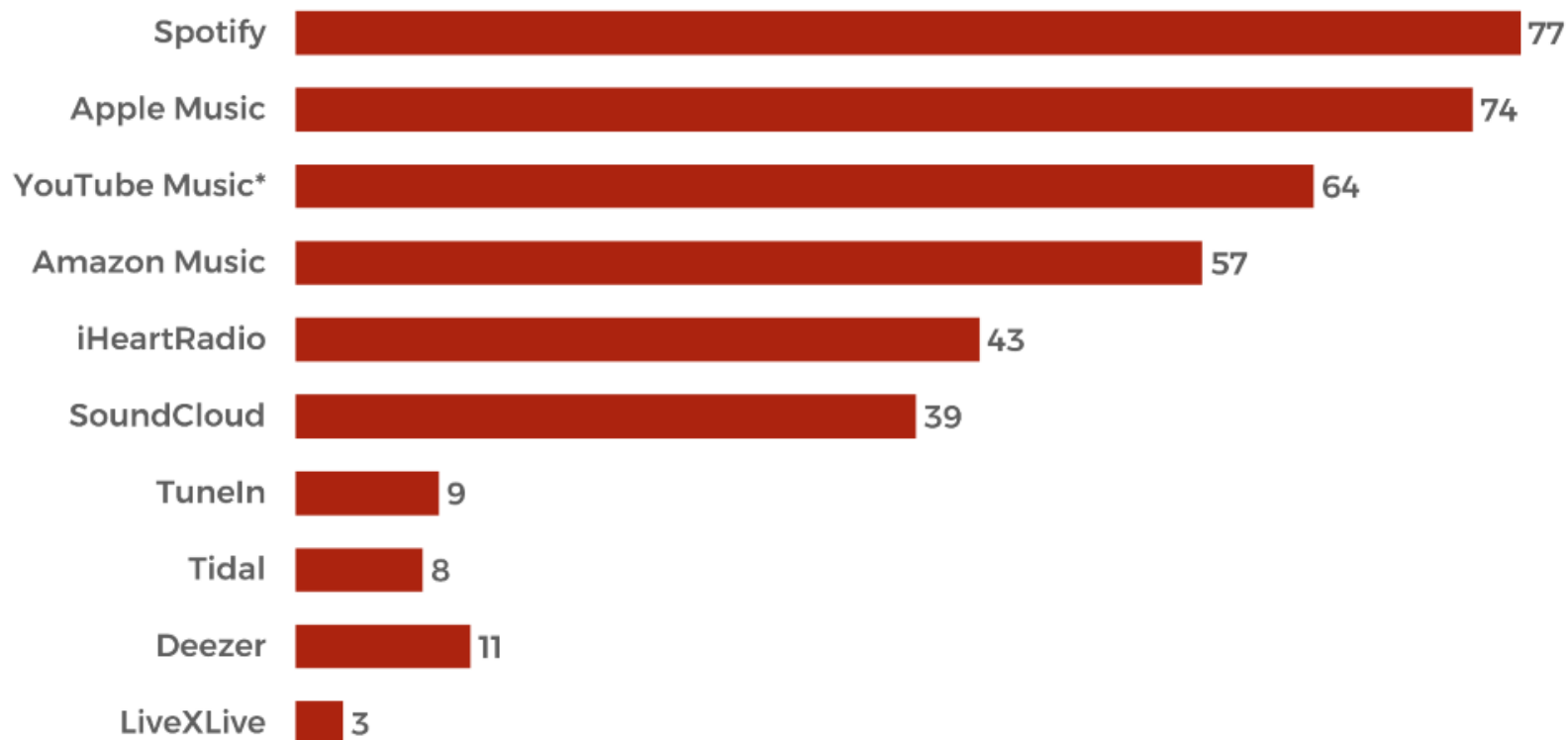
ONLINE AUDIO = LISTENING TO AM/FM RADIO STATIONS ONLINE AND/OR
LISTENING TO STREAMED AUDIO CONTENT AVAILABLE ONLY ON THE INTERNET



Online Audio Brand Awareness

TOTAL CANADIAN POPULATION 18+

% AWARE OF AUDIO BRAND

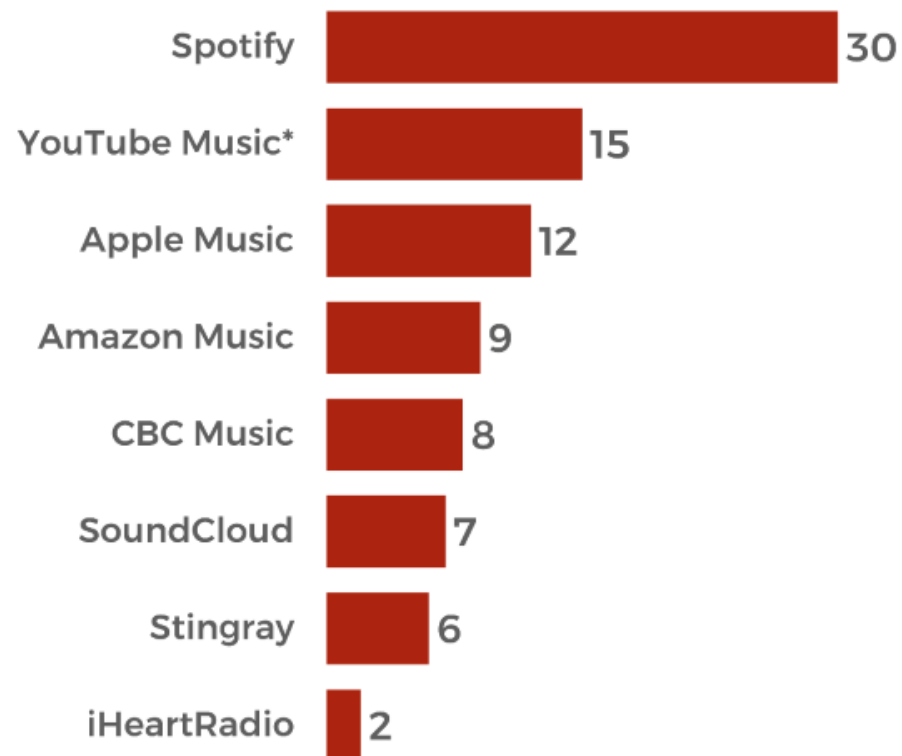


**Asked as, "Google Play, now known as YouTube Music"*

Online Audio Brands Used in Last Month

TOTAL CANADIAN POPULATION 18+

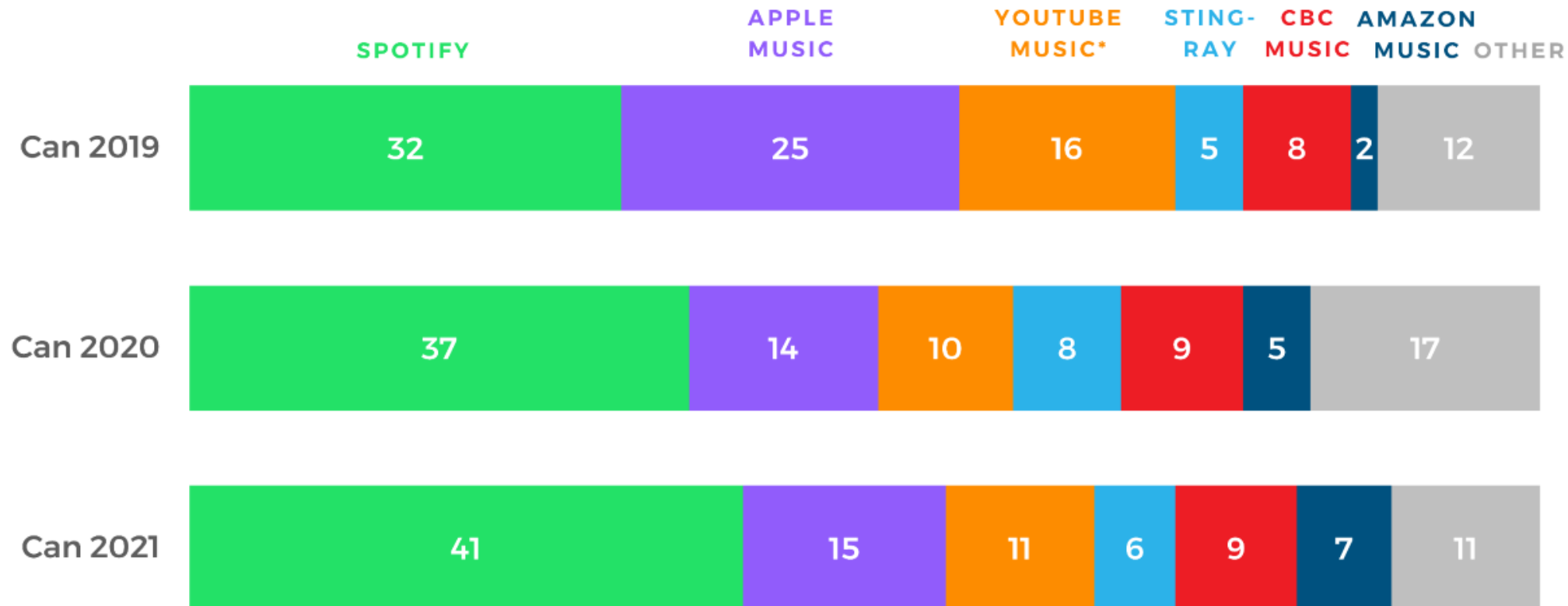
% LISTENED TO ONLINE AUDIO BRAND IN LAST MONTH



Asked as, "Google Play, now known as YouTube Music"

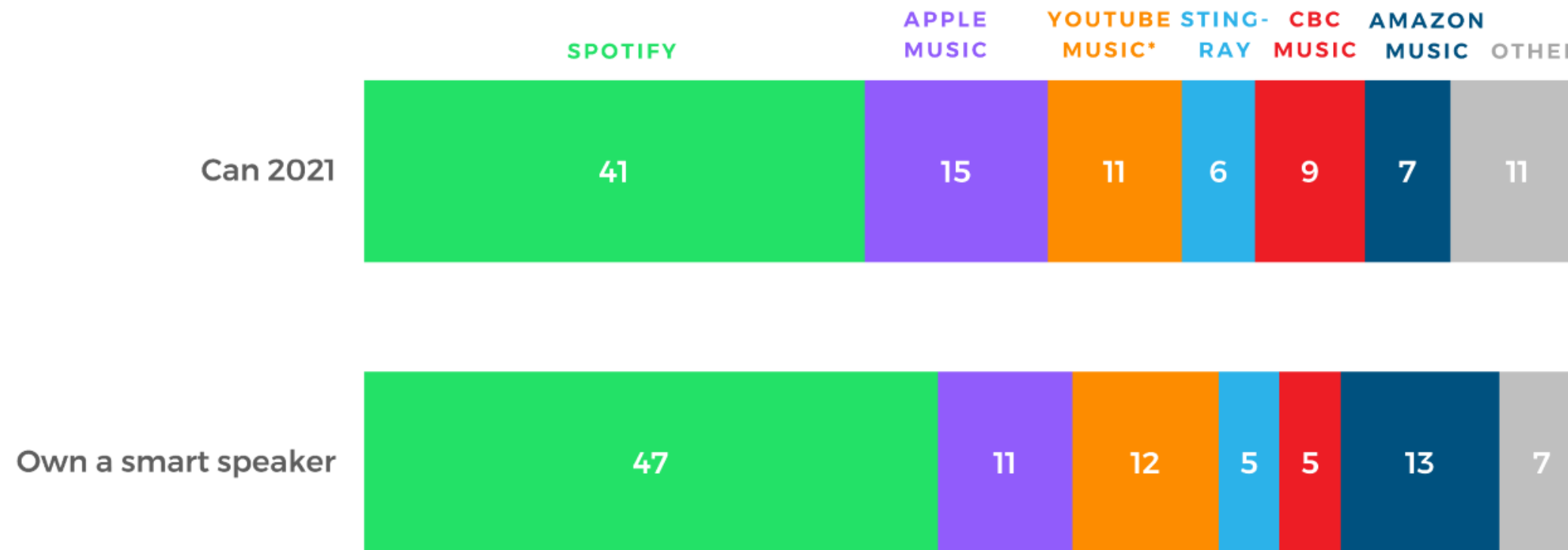
Online Audio Brand Used Most Often

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



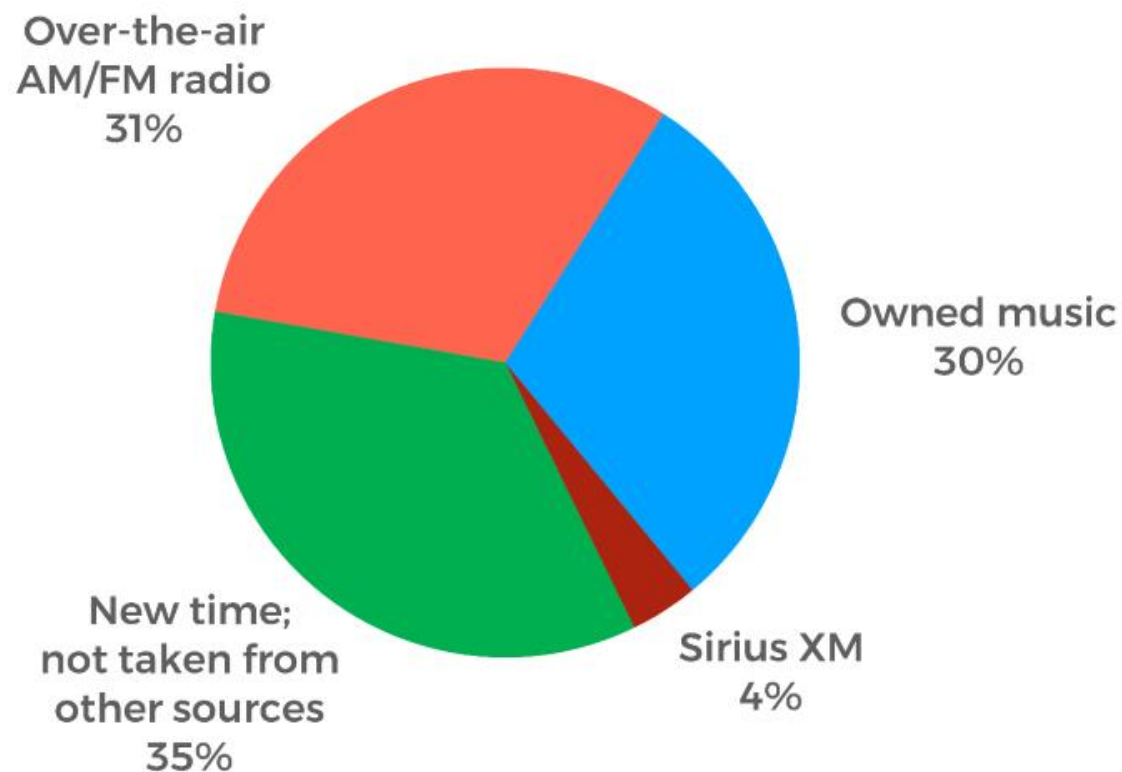
Online Audio Brand Used Most Often

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



What is Online Audio Listening Replacing?

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



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In-Car Audio



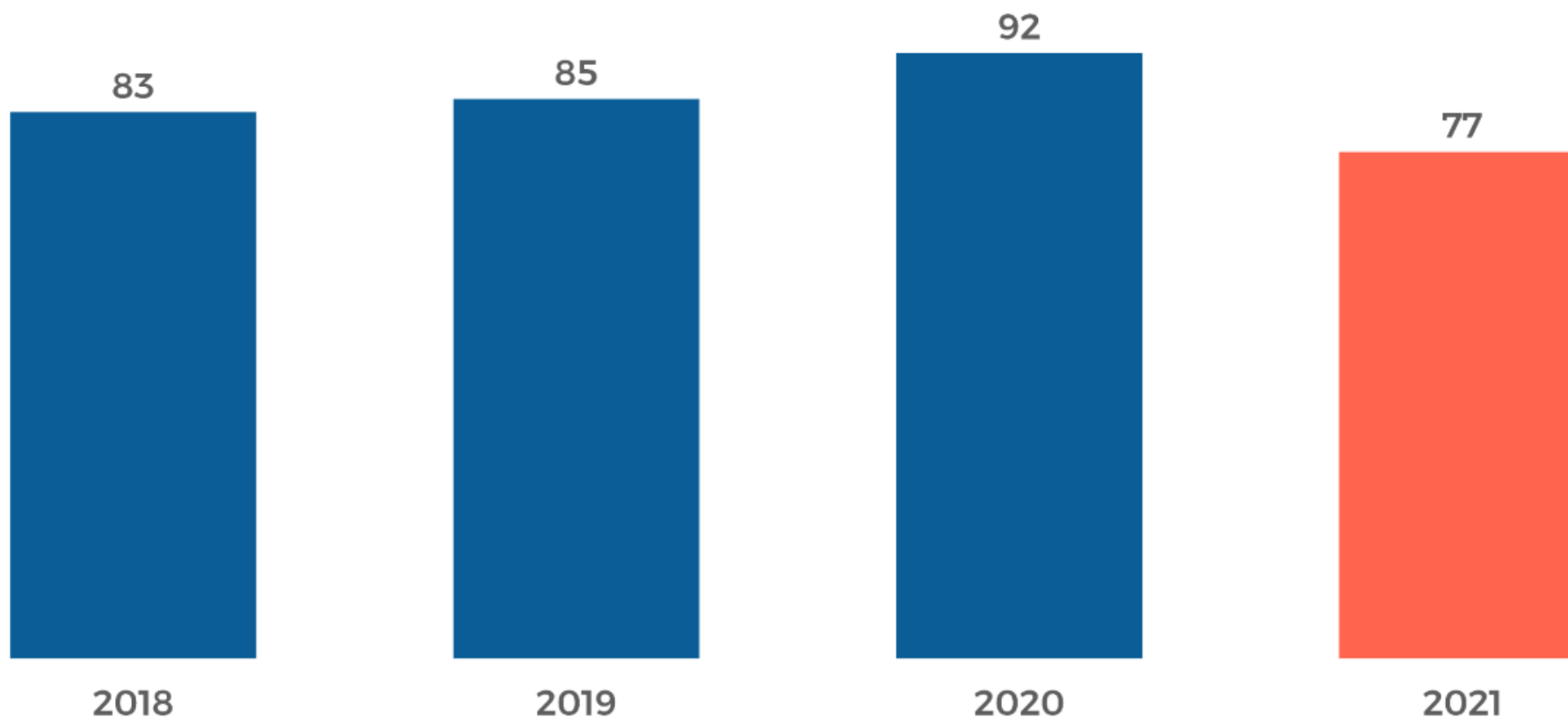
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Driven/Ridden in Car in Last Month

TOTAL CANADIAN POPULATION 18+

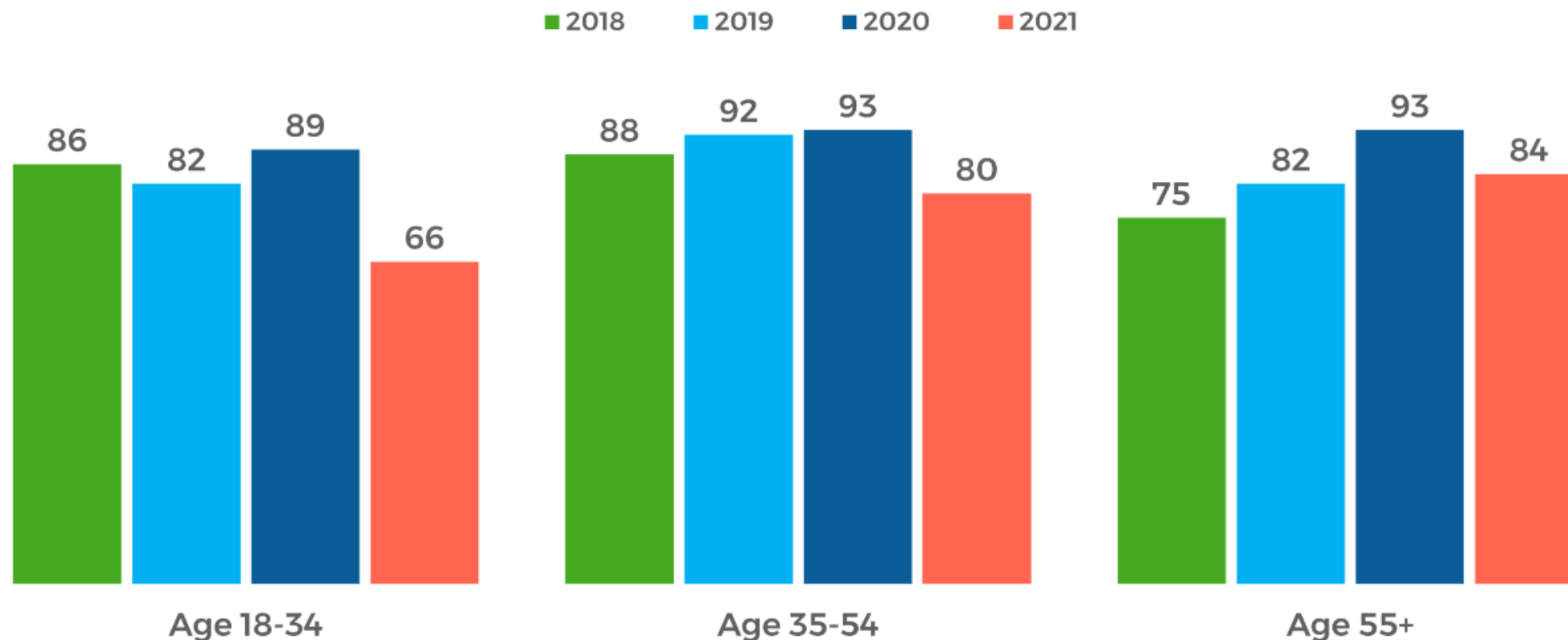
% DRIVING OR RIDING IN CAR/VEHICLE IN LAST MONTH



Driven/Ridden in Car in Last Month

TOTAL CANADIAN POPULATION 18+

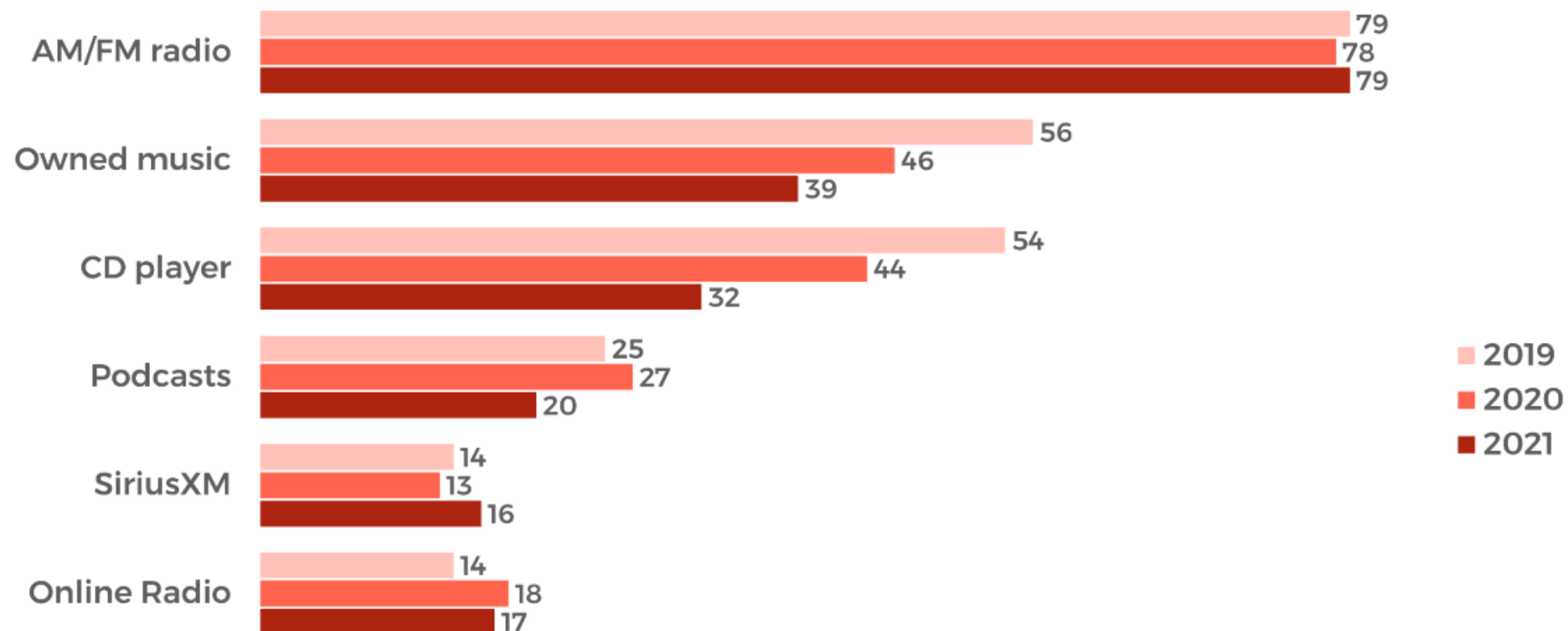
% DRIVING OR RIDING IN CAR/VEHICLE IN LAST MONTH



Audio Sources Used in Car

BASE: CANADIAN 18+ AND HAS DRIVEN/RIDDEN IN CAR IN LAST MONTH; 77%

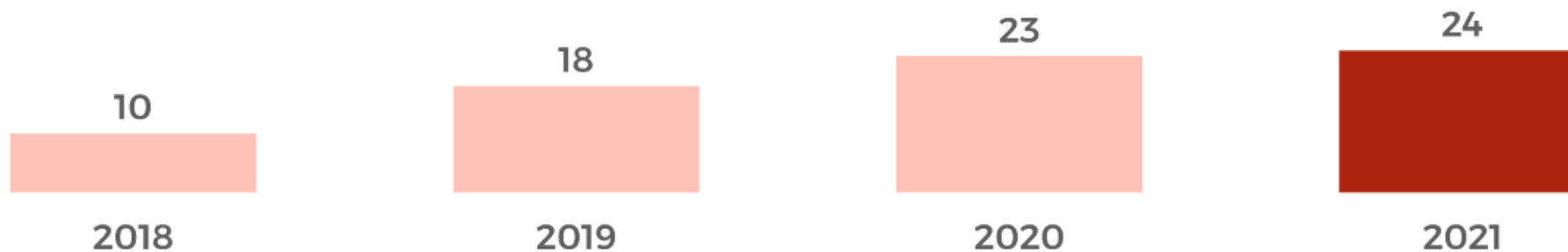
% USING AUDIO SOURCE IN CAR



In-Dash Information and Entertainment Systems

BASE: CANADIAN 18+ AND HAS DRIVEN/RIDDEN IN CAR IN LAST MONTH; 77%

% OWNING IN-DASH INFORMATION AND ENTERTAINMENT SYSTEM IN CAR

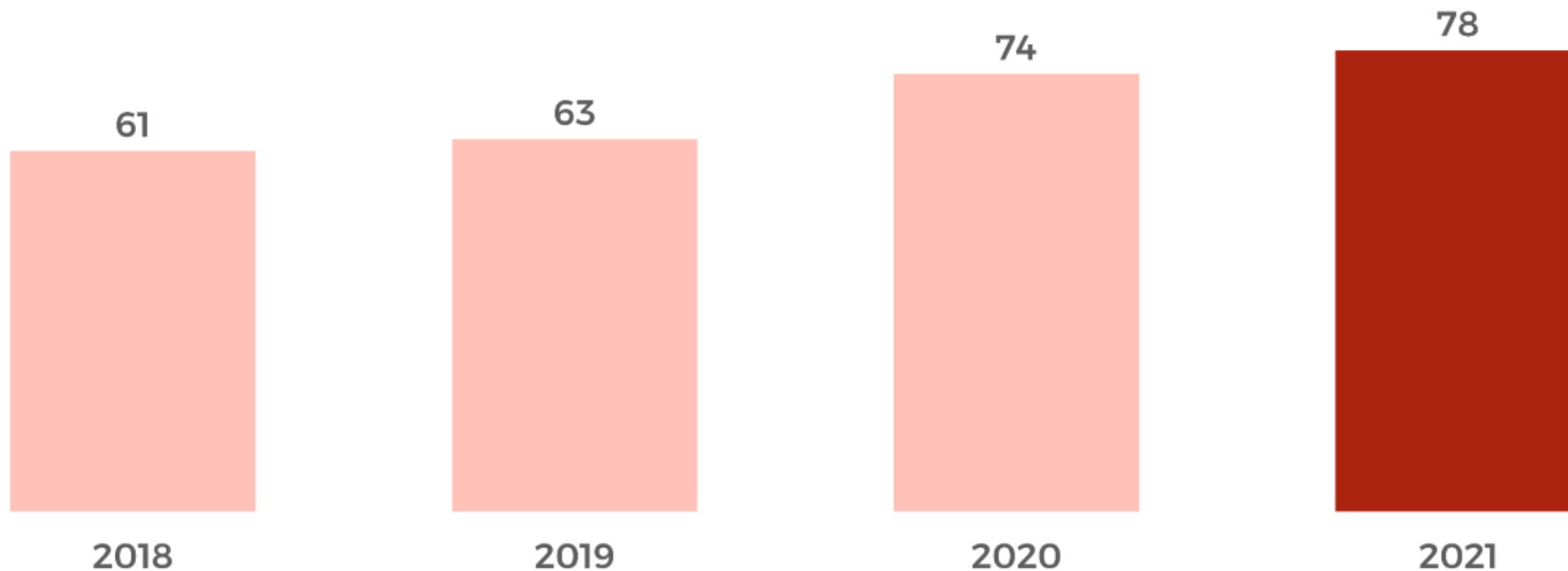


Podcasting

Podcasting Familiarity

TOTAL CANADIAN POPULATION 18+

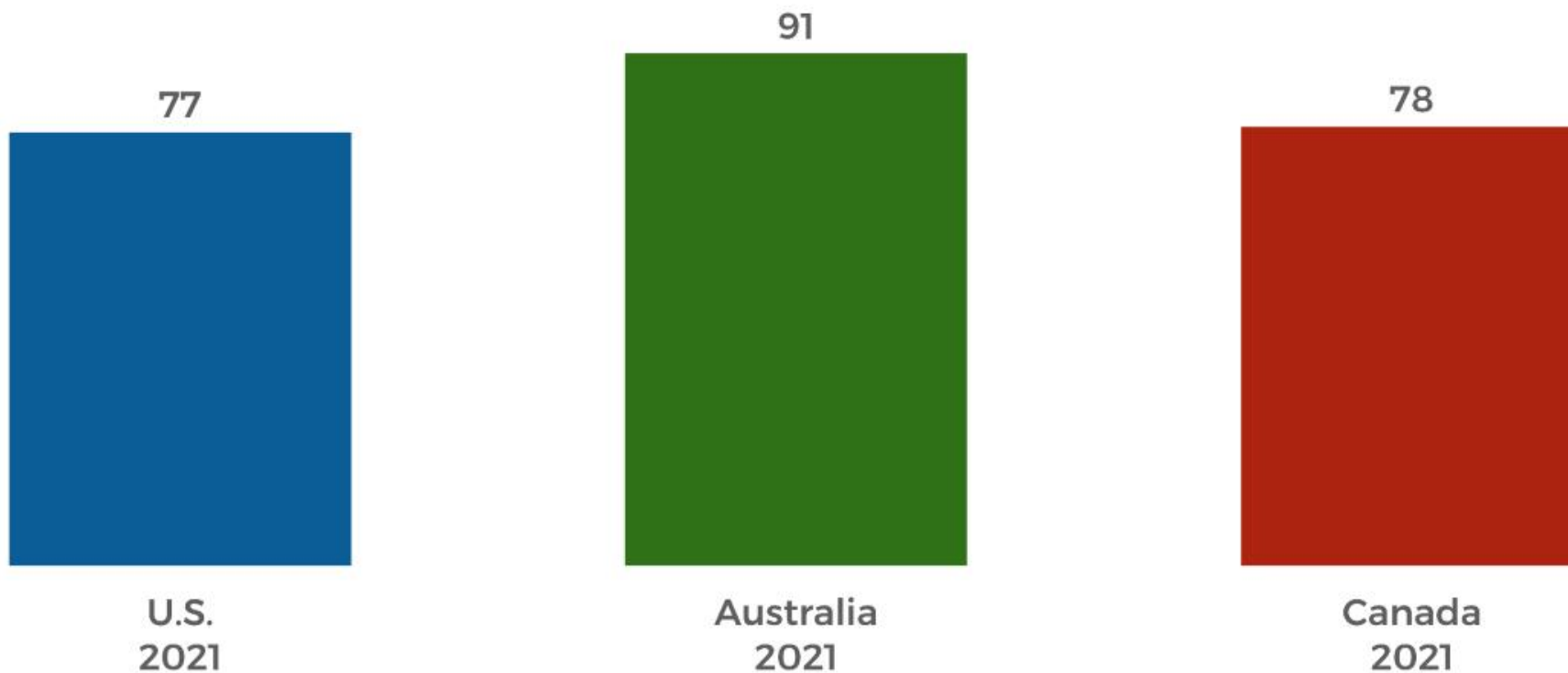
% FAMILIAR WITH THE TERM "PODCASTING"



Podcasting Familiarity

POPULATIONS 18+

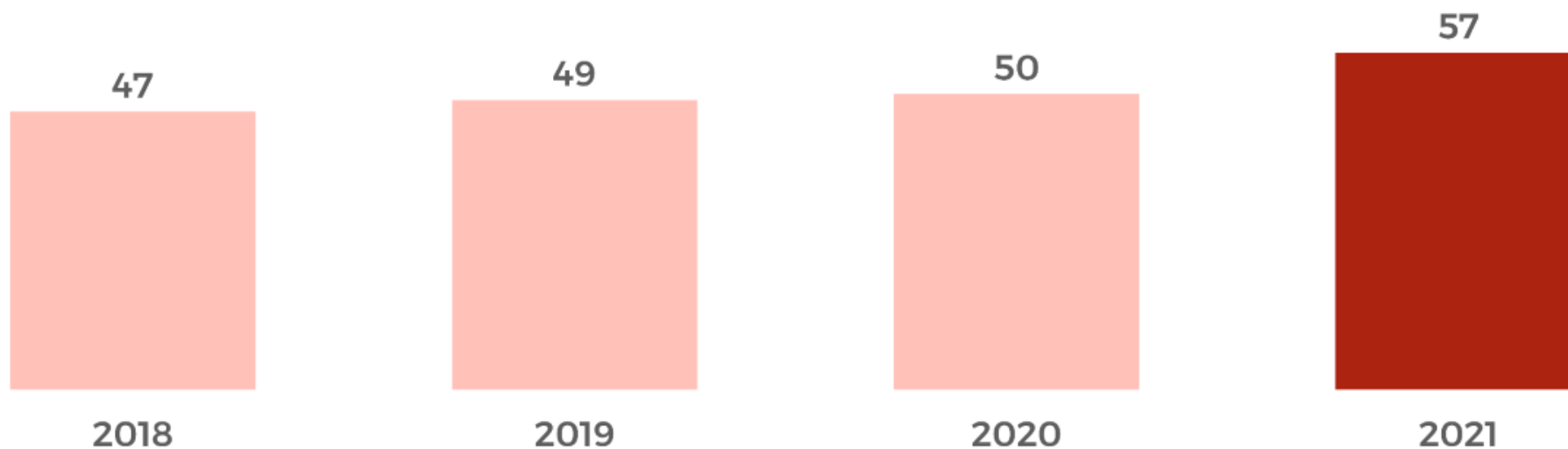
% FAMILIAR WITH THE TERM "PODCASTING"



Podcast Listening

TOTAL CANADIAN POPULATION 18+

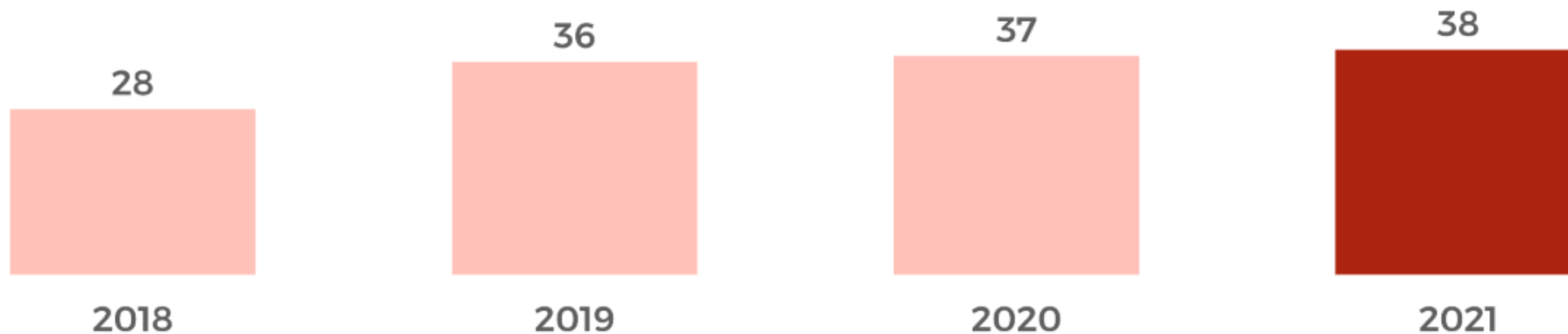
% EVER LISTENED TO A PODCAST



Monthly Podcast Listening

TOTAL CANADIAN POPULATION 18+

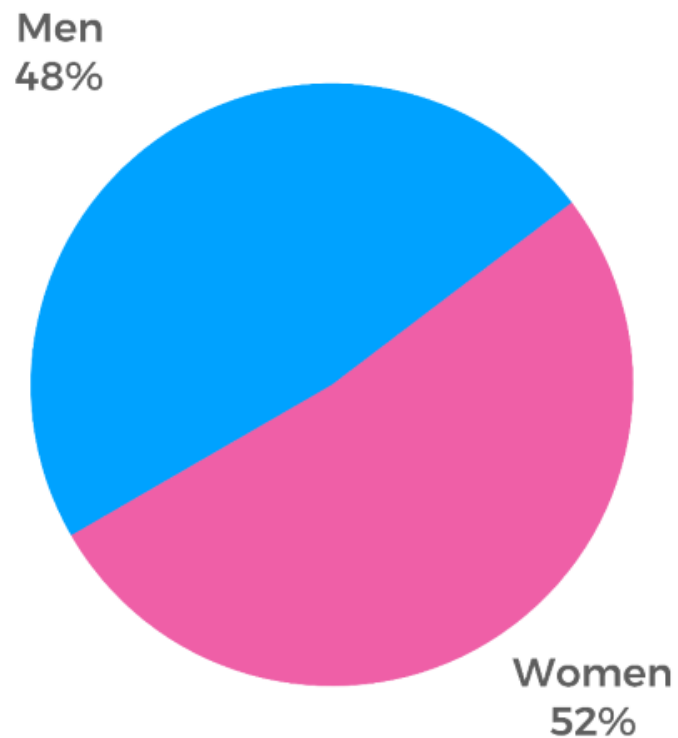
% LISTENED TO A PODCAST IN LAST MONTH



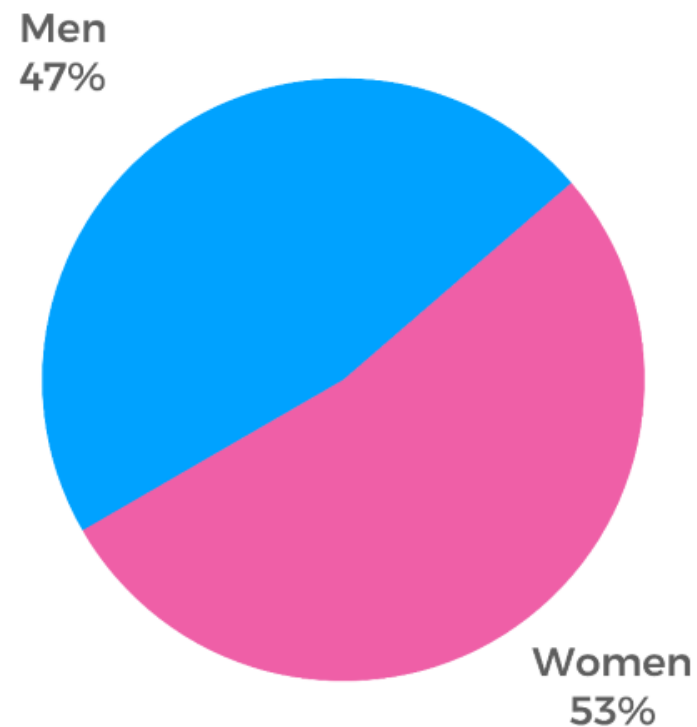
Gender of Monthly Podcast Listeners

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

CANADIAN POPULATION 18+



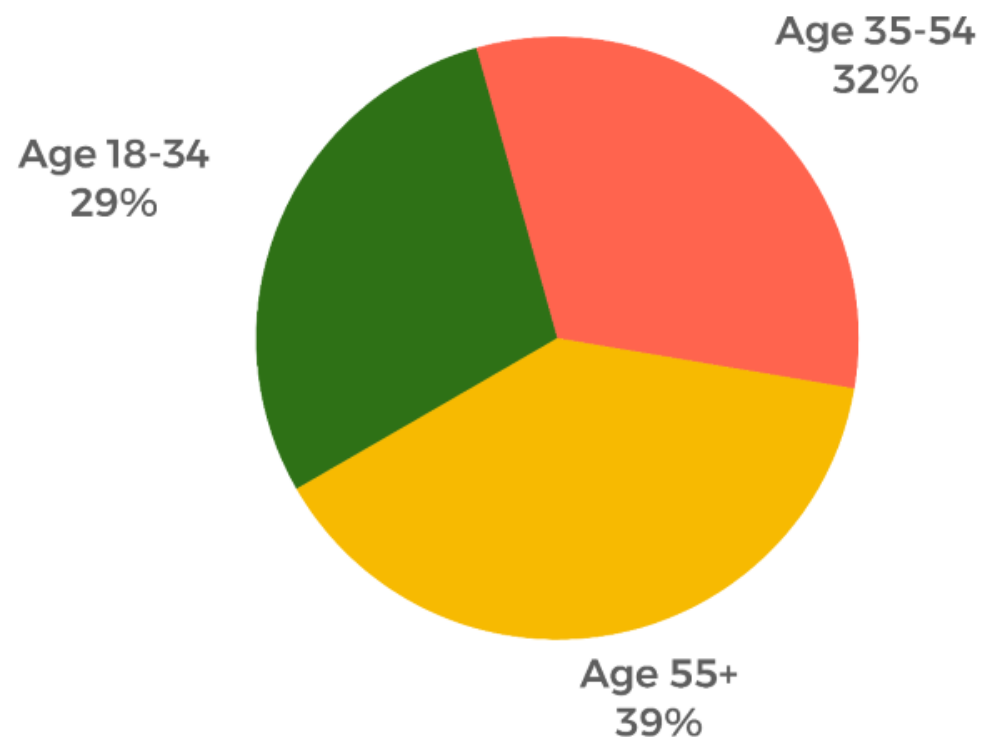
MONTHLY PODCAST CONSUMERS 18+



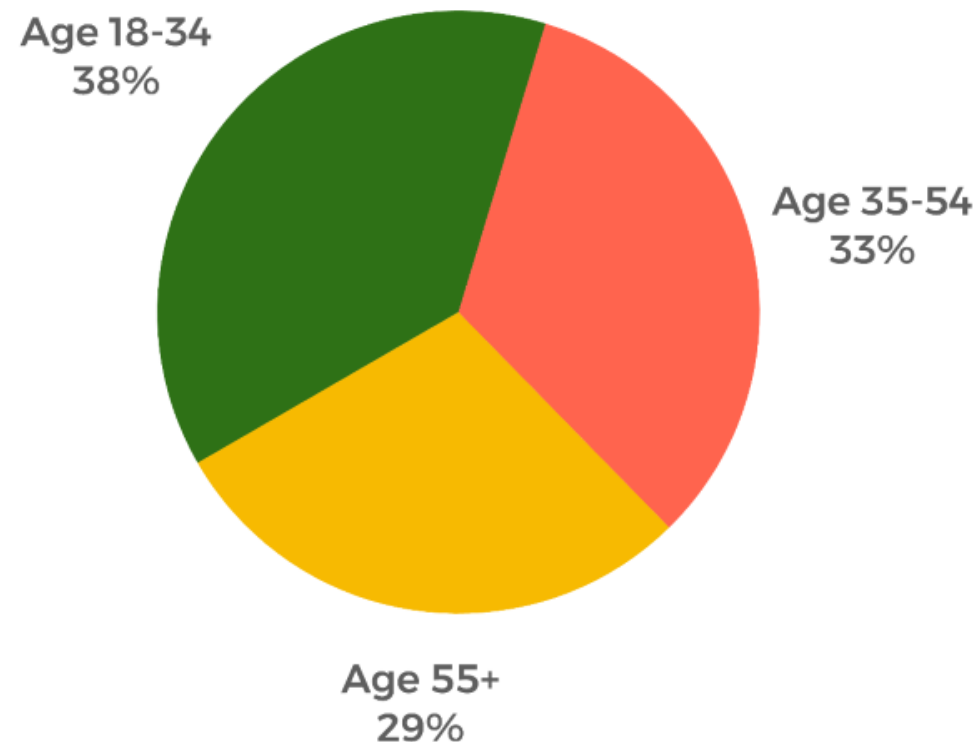
Age of Monthly Podcast Listeners

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

CANADIAN POPULATION 18+



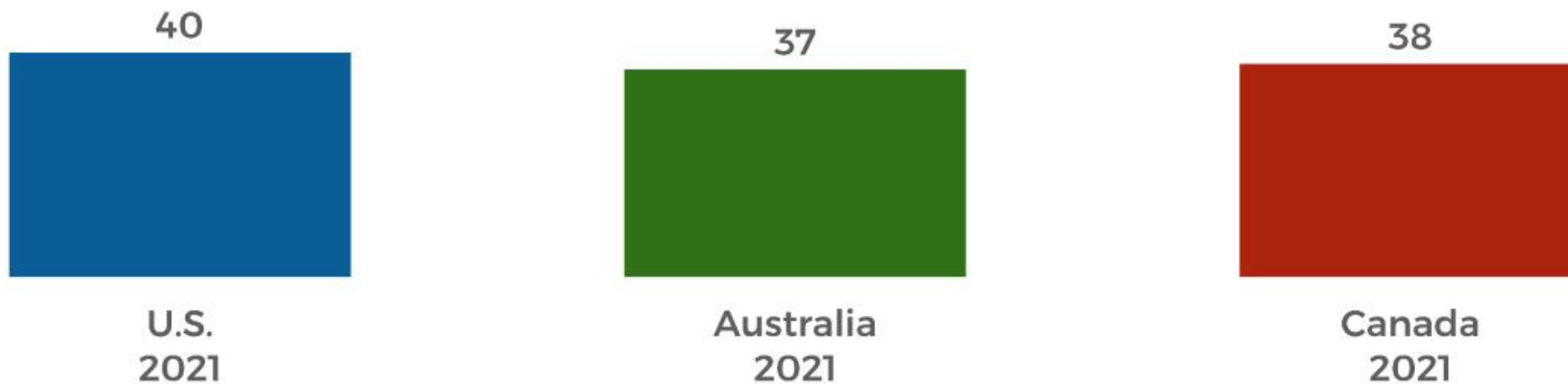
MONTHLY PODCAST CONSUMERS 18+



Monthly Podcast Listening

POPULATIONS 18+

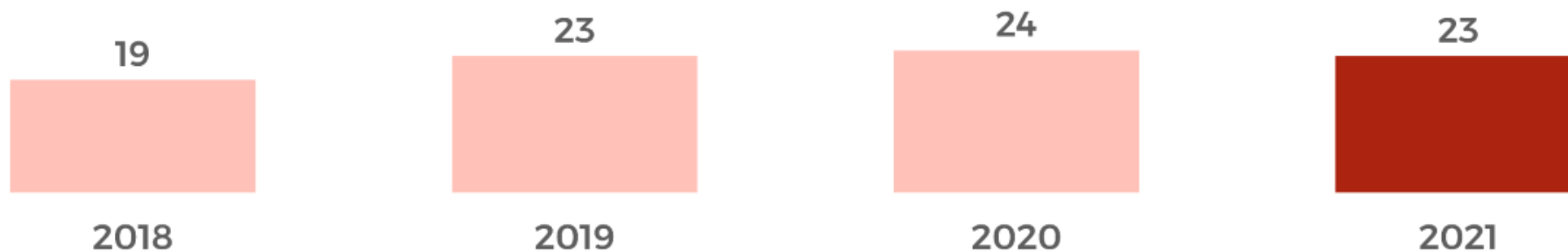
% LISTENED TO A PODCAST IN LAST MONTH



Weekly Podcast Listening

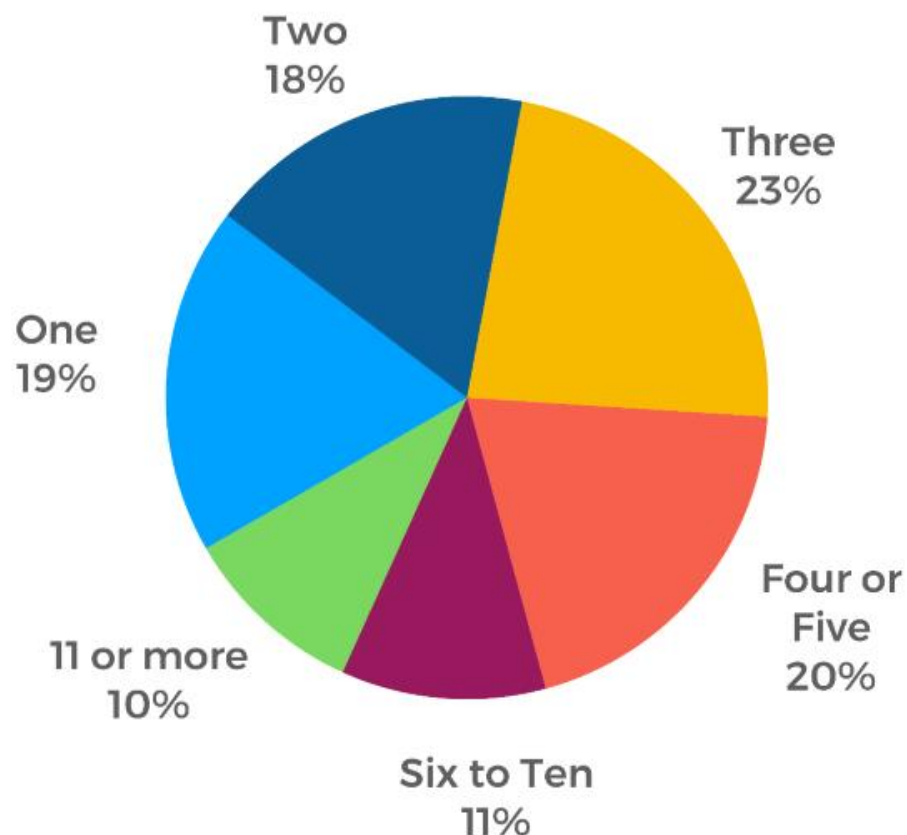
TOTAL CANADIAN POPULATION 18+

% LISTENED TO A PODCAST IN LAST WEEK



Number of Podcasts Listened to in Last Week

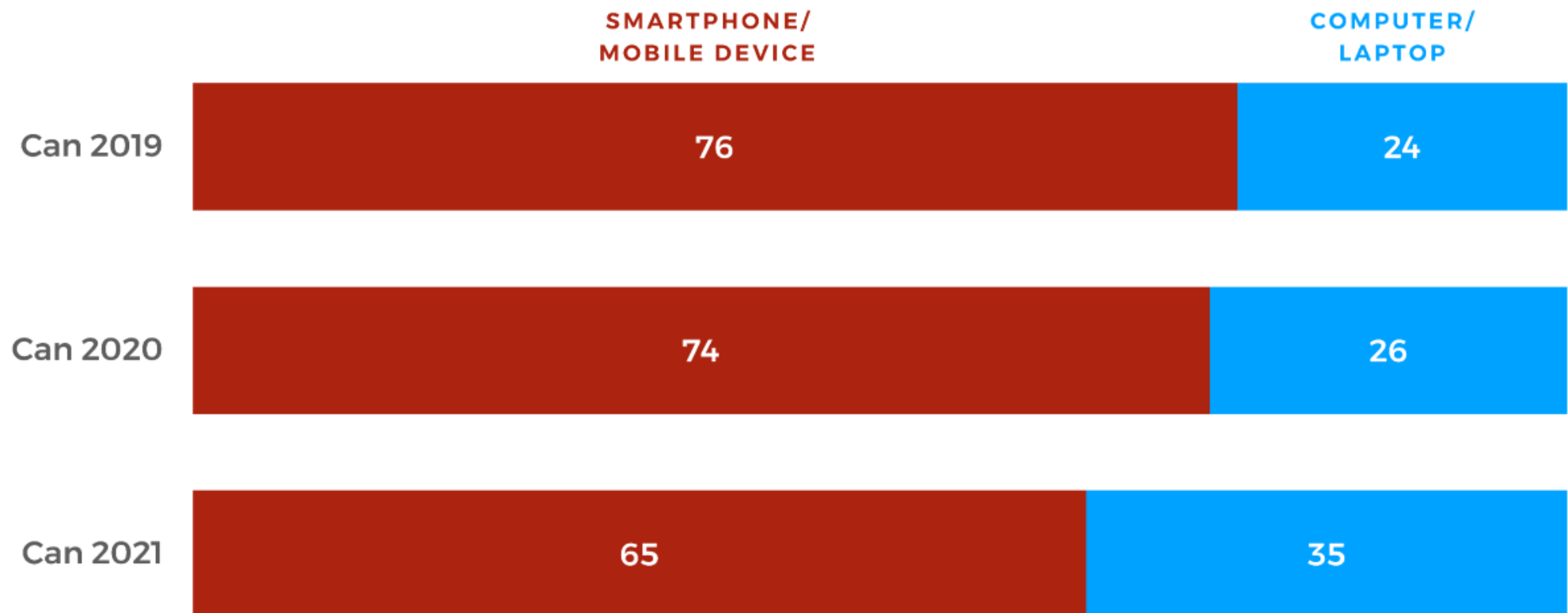
BASE: CANADIAN 18+ AND LISTENED TO PODCAST IN LAST WEEK



Canadian weekly podcast listeners averaged
five podcasts
in the last week

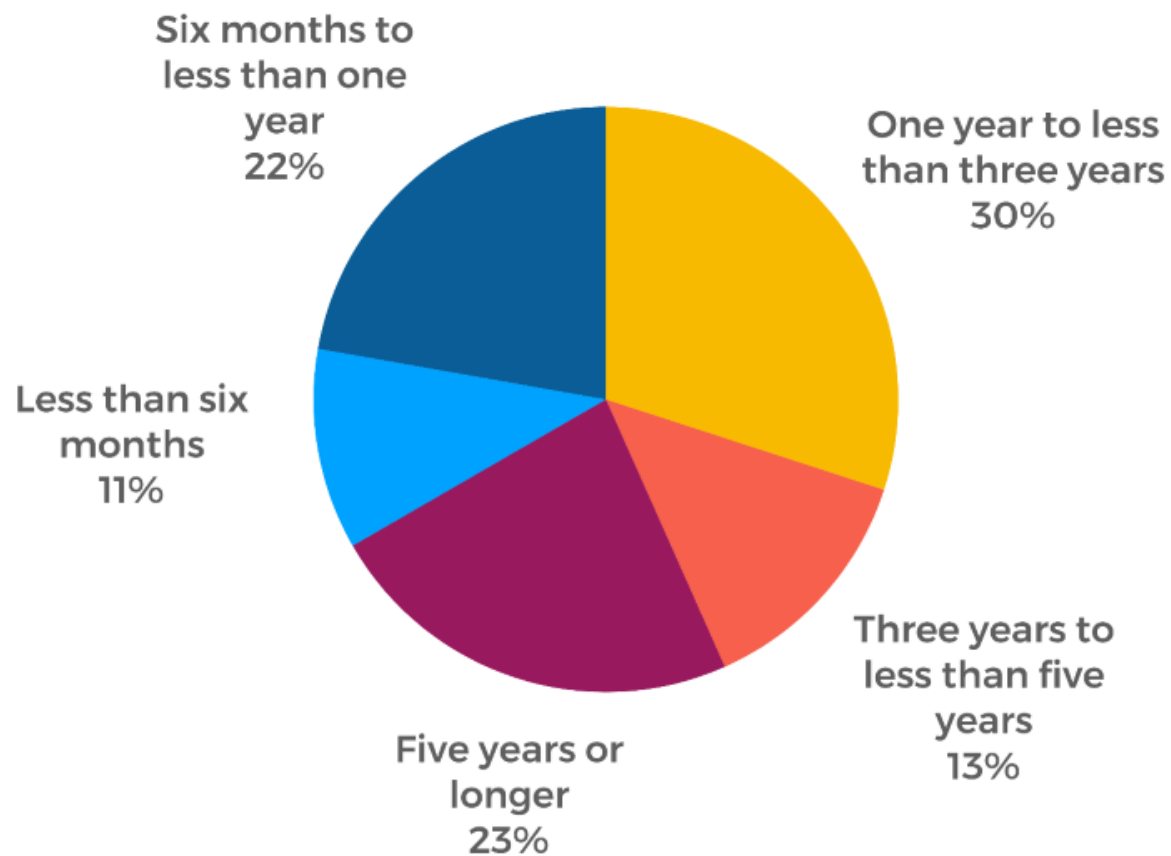
Device Used Most Often to Listen to Podcasts

BASE: CANADIAN 18+ AND EVER LISTENED TO A PODCAST



Length of Time as a Podcast Listener

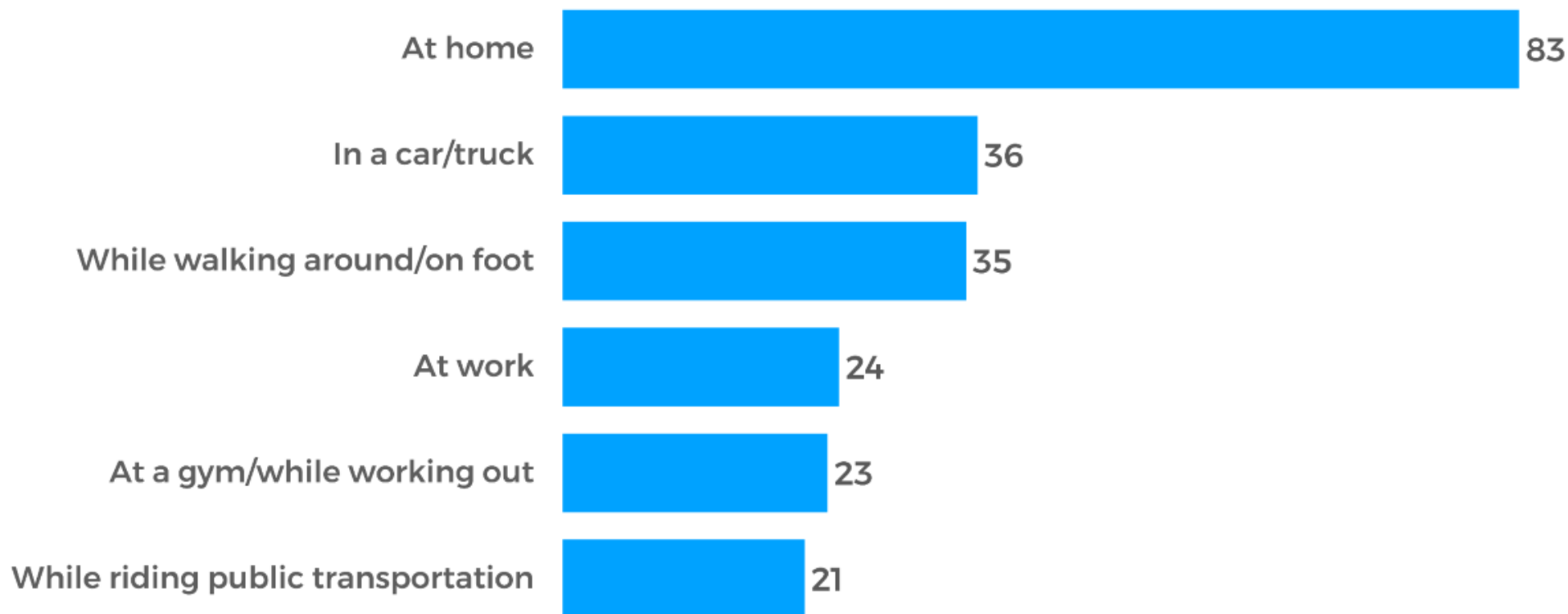
BASE: CANADIAN 18+ AND EVER LISTENED TO A PODCAST



Podcast Listening Locations

BASE: CANADIAN 18+ AND EVER LISTENED TO A PODCAST

% EVER LISTEN TO A PODCAST IN LOCATION



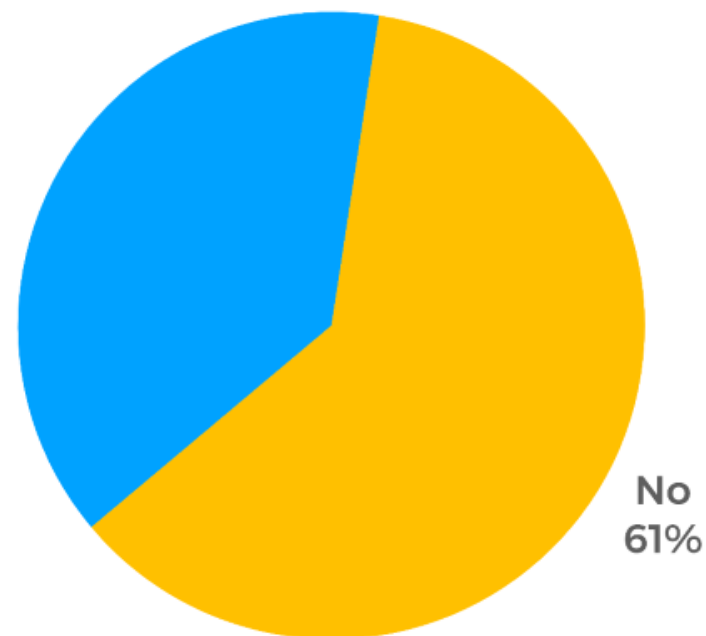
Listening to Podcasts from Public Radio Producers

BASE: CANADIAN 18+ AND EVER LISTENED TO A PODCAST

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

"Do you currently ever listen to any podcasts from public radio producers such as CBC, Radio Canada, or NPR?"

Yes
39%



No
61%

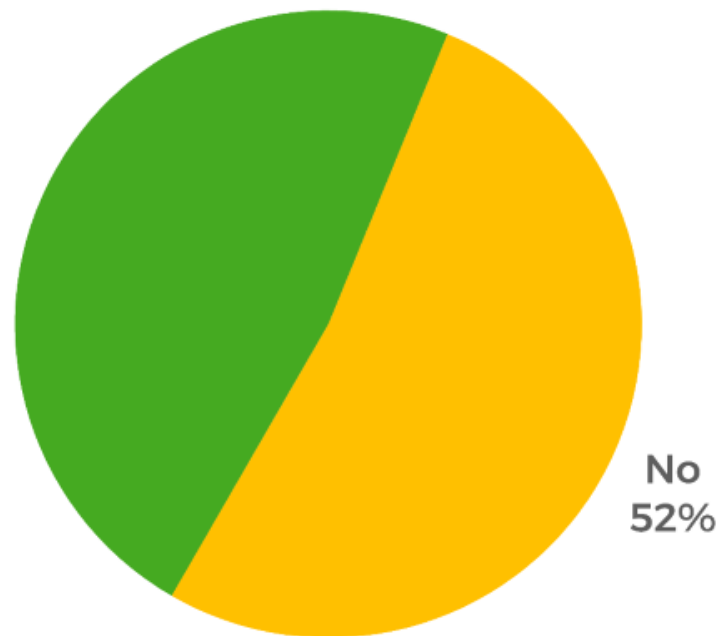
Listening to Podcasts from Canadian Producers

BASE: CANADIAN 18+ AND EVER LISTENED TO A PODCAST

% LISTENED TO PODCASTS PRODUCED IN CANADA

“Do you currently ever listen to any podcasts that you know are produced in Canada?”

Yes
48%

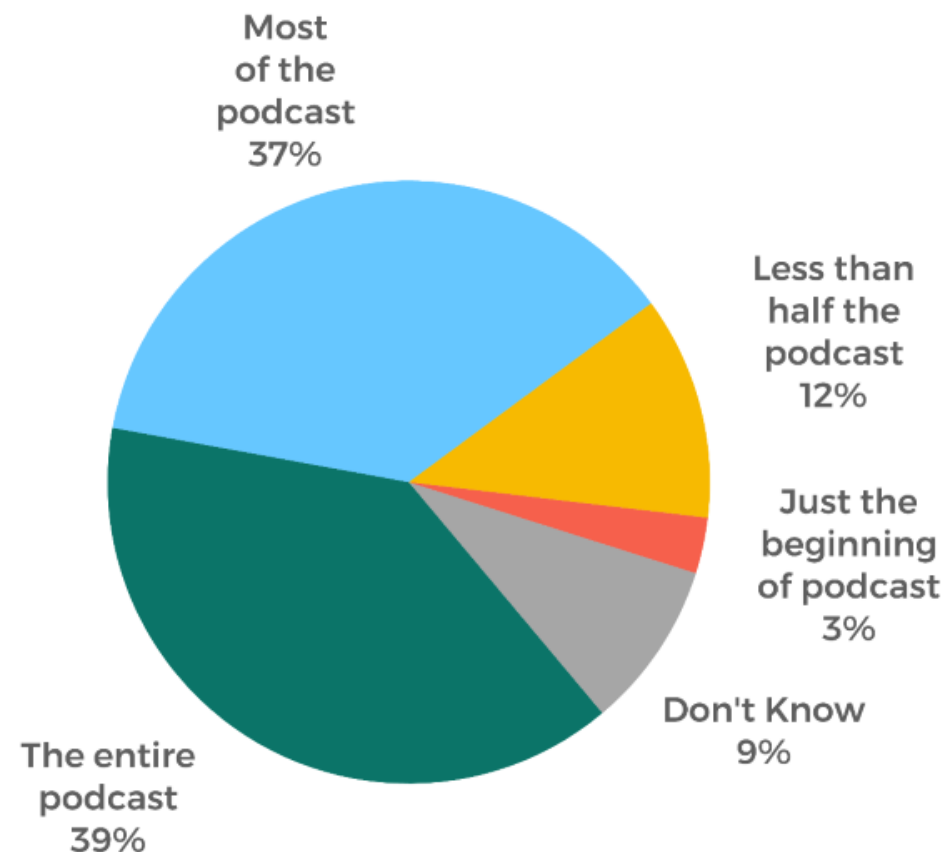


No
52%

Amount of Podcast Episodes Listened to

BASE: CANADIAN 18+ AND EVER LISTENED TO A PODCAST

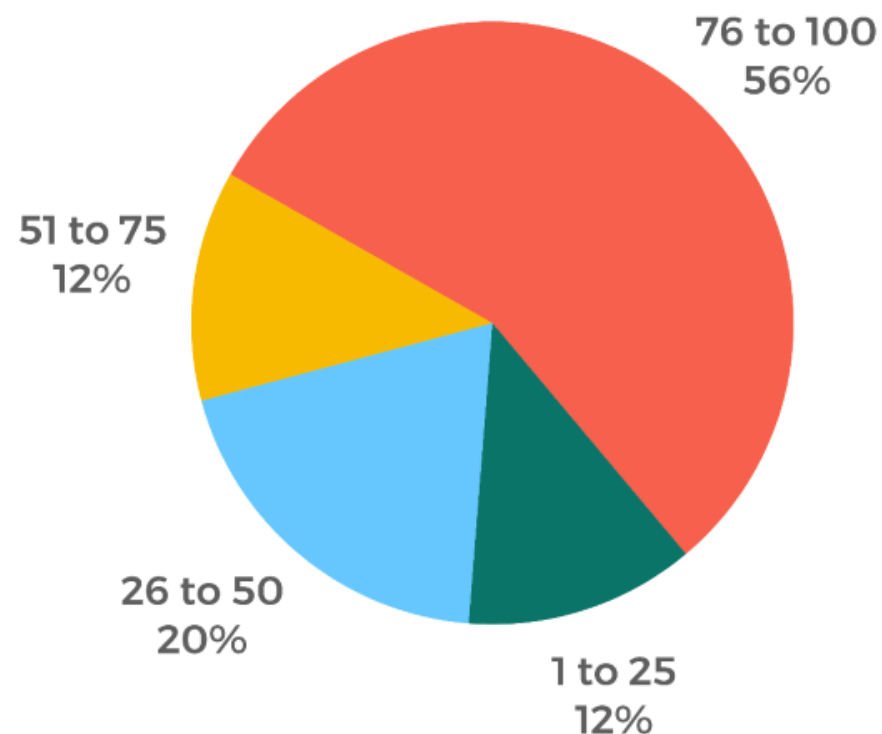
“Think about the podcast episodes you listen to. Do you typically listen to...?”



Amount of Podcast Episode Listened to

BASE: CANADIAN 18+ AND DOWNLOADED PODCASTS TO LISTEN TO AT A LATER TIME; 19%

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



Observations

More than 7 in 10 Canadians 18+ listen to online audio every month, leading the U.S. amongst persons 18+

Observations

Spotify is the leading online audio brand in Canada

Observations

Over one quarter of Canadians 18+ own a smart speaker, with the average nearing 2 devices per household

Observations

The percentage of Canadians who have driven or ridden in a car dropped significantly in the last year – from 92% in 2020 to 77% in 2021

Observations

More than half of Canadians 18+ have ever listened to a podcast. The percentage of monthly podcast listeners (38%) is comparable to the U.S. (40%) and Australia (37%)

Observations

Covid-19 related lockdowns, working from home, and decreased commute times likely drove an increase in people listening to podcasts most often on a desktop/laptop

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The Infinite Dial 2021 Canada

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