The Infinite Dial 2022
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, 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 March/April 2022, Edison Research conducted a national telephone survey of 1,014 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 CANADIAN POPULATION 18+
% OWNING A SMARTPHONE

<table>
<thead>
<tr>
<th>Year</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018</td>
<td>76</td>
</tr>
<tr>
<td>2019</td>
<td>82</td>
</tr>
<tr>
<td>2020</td>
<td>86</td>
</tr>
<tr>
<td>2021</td>
<td>86</td>
</tr>
<tr>
<td>2022</td>
<td>88</td>
</tr>
</tbody>
</table>
Tablet Ownership

TOTAL CANADIAN POPULATION 18+

% OWNING A TABLET

- 2018: 49%
- 2019: 52%
- 2020: 46%
- 2021: 54%
- 2022: 51%
Smart Speaker Ownership

TOTAL CANADIAN POPULATION 18+

% OWN ANY SMART SPEAKER

- 2018: 8%
- 2019: 26%
- 2020: 26%
- 2021: 27%
- 2022: 30%
Smart Speaker Ownership

POPULATIONS 18+

% OWN ANY SMART SPEAKER

<table>
<thead>
<tr>
<th>Country</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>U.S. 2022</td>
<td>35</td>
</tr>
<tr>
<td>Australia 2022</td>
<td>26</td>
</tr>
<tr>
<td>Canada 2022</td>
<td>30</td>
</tr>
</tbody>
</table>
Number of Smart Speakers in Household

BASE: CANADIAN AGE 18+ SMART SPEAKER OWNERS

<table>
<thead>
<tr>
<th>Year</th>
<th>ONE</th>
<th>TWO</th>
<th>THREE OR MORE</th>
<th>MEAN # OF SMART SPEAKERS</th>
</tr>
</thead>
<tbody>
<tr>
<td>2020</td>
<td>58</td>
<td>25</td>
<td>17</td>
<td>1.7</td>
</tr>
<tr>
<td>2021</td>
<td>57</td>
<td>27</td>
<td>16</td>
<td>1.8</td>
</tr>
<tr>
<td>2022</td>
<td>49</td>
<td>26</td>
<td>24</td>
<td>2.0</td>
</tr>
</tbody>
</table>
Online Audio
Listening to AM/FM Radio Online in Last Month

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

- **2018**: 22%
- **2019**: 22%
- **2020**: 21%
- **2021**: 21%
- **2022**: 25%
Listening to AM/FM Radio Online in Last Week

TOTAL CANADIAN POPULATION 18+

% LISTENED TO AM/FM RADIO ONLINE IN LAST WEEK

- 2018: 14%
- 2019: 17%
- 2020: 14%
- 2021: 14%
- 2022: 20%
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

<table>
<thead>
<tr>
<th>Year</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018</td>
<td>57</td>
</tr>
<tr>
<td>2019</td>
<td>59</td>
</tr>
<tr>
<td>2020</td>
<td>70</td>
</tr>
<tr>
<td>2021</td>
<td>71</td>
</tr>
<tr>
<td>2022</td>
<td>73</td>
</tr>
</tbody>
</table>
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

- **U.S.**
  - 2022: 73%

- **Australia**
  - 2022: 76%

- **Canada**
  - 2022: 73%
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

<table>
<thead>
<tr>
<th>Year</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018</td>
<td>49</td>
</tr>
<tr>
<td>2019</td>
<td>51</td>
</tr>
<tr>
<td>2020</td>
<td>60</td>
</tr>
<tr>
<td>2021</td>
<td>61</td>
</tr>
<tr>
<td>2022</td>
<td>64</td>
</tr>
</tbody>
</table>
### Online Audio Brand Awareness

**Total Canadian Population 18+**

<table>
<thead>
<tr>
<th>Brand</th>
<th>% Aware of Audio Brand</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spotify</td>
<td>79</td>
</tr>
<tr>
<td>YouTube Music</td>
<td>67</td>
</tr>
<tr>
<td>Amazon Music</td>
<td>65</td>
</tr>
<tr>
<td>Apple Music</td>
<td>64</td>
</tr>
<tr>
<td>iHeartRadio</td>
<td>44</td>
</tr>
<tr>
<td>CBC Music</td>
<td>44</td>
</tr>
<tr>
<td>SoundCloud</td>
<td>35</td>
</tr>
<tr>
<td>Stingray</td>
<td>29</td>
</tr>
<tr>
<td>Radio Player Canada</td>
<td>27</td>
</tr>
<tr>
<td>TuneIn</td>
<td>12</td>
</tr>
</tbody>
</table>
Online Audio Brands Used in Last Month

TOTAL CANADIAN POPULATION 18+
% LISTENED TO ONLINE AUDIO BRAND IN LAST MONTH

- Spotify: 40%
- YouTube Music: 33%
- Amazon Music: 14%
- Apple Music: 11%
- CBC Music: 8%
- iHeartRadio: 7%
- SoundCloud: 6%
- Stingray: 6%
- RadioPlayer Canada: 4%
- TuneIn: 4%
Online Audio Brand Used Most Often

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

<table>
<thead>
<tr>
<th>Year</th>
<th>SPOTIFY</th>
<th>YOUTUBE MUSIC*</th>
<th>AMAZON MUSIC</th>
<th>APPLE MUSIC</th>
<th>CBC MUSIC</th>
<th>STINGRAY</th>
<th>OTHER</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019</td>
<td>32</td>
<td>16</td>
<td>2</td>
<td>25</td>
<td>8</td>
<td>5</td>
<td>12</td>
</tr>
<tr>
<td>2020</td>
<td>37</td>
<td>10</td>
<td>5</td>
<td>14</td>
<td>9</td>
<td>8</td>
<td>17</td>
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<td>2021</td>
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<td>11</td>
<td>7</td>
<td>15</td>
<td>9</td>
<td>6</td>
<td>11</td>
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<td>2022</td>
<td>42</td>
<td>25</td>
<td>8</td>
<td>6</td>
<td>5</td>
<td>4</td>
<td>10</td>
</tr>
</tbody>
</table>

2019-2021: ASKED AS "GOOGLE PLAY"
Online Audio Brand Used Most Often

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

**Total 18+ Population**
- **SPOTIFY**: 42
- **YOUTUBE MUSIC**: 25
- **AMAZON MUSIC**: 8
- **APPLE MUSIC**: 6
- **CBC MUSIC**: 5
- **STINGRAY**: 4
- **OTHER**: 10

**Own a smart speaker**
- **SPOTIFY**: 51
- **YOUTUBE MUSIC**: 24
- **AMAZON MUSIC**: 8
- **APPLE MUSIC**: 7
- **CBC MUSIC**: 2
- **STINGRAY**: 8
- **OTHER**: 8
In-Car Audio
Driven/Ridden in Car in Last Month

TOTAL CANADIAN POPULATION 18+
% DRIVING OR RIDING IN CAR/VEHICLE IN LAST MONTH

<table>
<thead>
<tr>
<th>Year</th>
<th>% Driving or Riding</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018</td>
<td>83</td>
</tr>
<tr>
<td>2019</td>
<td>85</td>
</tr>
<tr>
<td>2020</td>
<td>92</td>
</tr>
<tr>
<td>2021</td>
<td>77</td>
</tr>
<tr>
<td>2022</td>
<td>84</td>
</tr>
</tbody>
</table>
Driven/Ridden in Car in Last Month

TOTAL CANADIAN POPULATION 18+
% DRIVING OR RIDING IN CAR/VEHICLE IN LAST MONTH

- **Age 18-34**: 82% (2019), 89% (2020), 79% (2021), 66% (2022)
- **Age 35-54**: 92% (2019), 93% (2020), 80% (2021), 86% (2022)
- **Age 55+**: 82% (2019), 93% (2020), 84% (2021), 84% (2022)
Audio Sources Used in Car

BASE: CANADIAN 18+ AND HAS DRIVEN/RIDDEN IN CAR IN LAST MONTH; 84%

% USING AUDIO SOURCE IN CAR

- **AM/FM radio**: 78% (2020), 79% (2021), 70% (2022)
- **CD player**: 32% (2020), 39% (2021), 44% (2022)
- **Owned music**: 34% (2020), 39% (2021), 46% (2022)
- **Podcasts**: 20% (2020), 20% (2021), 27% (2022)
- **SiriusXM**: 13% (2020), 16% (2021), 19% (2022)
- **Online Radio**: 18% (2020), 17% (2021), 19% (2022)
In-Dash Information and Entertainment Systems

BASE: CANADIAN 18+ AND HAS DRIVEN/RIDDEN IN CAR IN LAST MONTH; 84%

% OWNING IN-DASH INFORMATION AND ENTERTAINMENT SYSTEM IN CAR

<table>
<thead>
<tr>
<th>Year</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018</td>
<td>10</td>
</tr>
<tr>
<td>2019</td>
<td>18</td>
</tr>
<tr>
<td>2020</td>
<td>23</td>
</tr>
<tr>
<td>2021</td>
<td>24</td>
</tr>
<tr>
<td>2022</td>
<td>26</td>
</tr>
</tbody>
</table>
Podcasting
Podcasting Familiarity

TOTAL CANADIAN POPULATION 18+

% FAMILIAR WITH THE TERM "PODCAST"

2018: 61
2019: 63
2020: 74
2021: 78
2022: 77
Podcasting Familiarity

POPULATIONS 18+
% FAMILIAR WITH THE TERM "PODCASTING"

- U.S. 2022: 78%
- Australia 2022: 89%
- Canada 2022: 77%
Podcast Listening
TOTAL CANADIAN POPULATION 18+
% EVER LISTENED TO A PODCAST

- 2018: 47%
- 2019: 49%
- 2020: 50%
- 2021: 57%
- 2022: 58%
Monthly Podcast Listening

TOTAL CANADIAN POPULATION 18+
% LISTENED TO A PODCAST IN LAST MONTH

- 2018: 28%
- 2019: 36%
- 2020: 37%
- 2021: 38%
- 2022: 43%
Monthly Podcast Listening

POPULATIONS 18+
% LISTENED TO A PODCAST IN LAST MONTH

- U.S. 2022: 38%
- Australia 2022: 40%
- Canada 2022: 43%
Gender of Monthly Podcast Listeners

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

CANADIAN POPULATION 18+

Men 48%
Women 52%

MONTHLY PODCAST CONSUMERS 18+

Men 51%
Women 49%
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: 32%
- Age 55+: 39%

**MONTHLY PODCAST CONSUMERS 18+**
- Age 18-34: 45%
- Age 35-54: 37%
- Age 55+: 18%
Weekly Podcast Listening

TOTAL CANADIAN POPULATION 18+
% LISTENED TO A PODCAST IN LAST WEEK

- 19% in 2018
- 23% in 2019
- 24% in 2020
- 23% in 2021
- 26% in 2022
Number of Podcast Episodes Listened to in Last Week

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

Canadian weekly podcast listeners averaged **five episodes** in the last week.
Podcast Listening Locations

BASE: CANADIAN 18+ AND LISTENED TO A PODCAST IN LAST MONTH; 43%

% EVER LISTEN TO A PODCAST IN LOCATION

- At home: 88%
- At work: 33%
- In a car/truck: 30%
- While walking around/on foot: 28%
- While riding public transportation: 19%
- At a gym/while working out: 19%
Listening to Podcasts from Canadian Producers

BASE: CANADIAN 18+ AND LISTENED TO A PODCAST IN LAST MONTH; 43%
% LISTENED TO PODCASTS PRODUCED IN CANADA

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

- Yes: 56%
- No: 44%
Amount of Podcast Episode Listened to

BASE: CANADIAN 18+ AND LISTENED TO A PODCAST IN LAST MONTH; 43%

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

- The entire podcast 47%
- Most of the podcast 44%
- Less than half the podcast 7%
- Just the beginning of podcast 2%
Observations

Nearly three-quarters (73%) of Canadians 18+ listen to online audio on a monthly basis, which puts it right in line with the U.S. (73%) and Australia (76%)
Observations

CBC Music and Stingray made a dominant appearance this year in both awareness and usage.
Observations

YouTube Music grew as an audio brand and destination for listeners. While Spotify remains #1, YouTube Music is the one to keep watching.
Observations

Smart speaker ownership grew in 2022, with one in three Canadians age 18+ owning at least one device.
Observations

One-quarter of Canadians who ride in cars now own an in-dash entertainment system, while in-car listening to Satellite radio and online audio services increases
Observations

Podcast listening continues its growth to its highest point in weekly and monthly habits, leading both the U.S. and Australia with 43% listening monthly.
The Infinite Dial 2022
Canada

#InfiniteDial