

 THE INFINITE DIAL® 2022

The Infinite Dial 2022

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, 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

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Media & Technologies



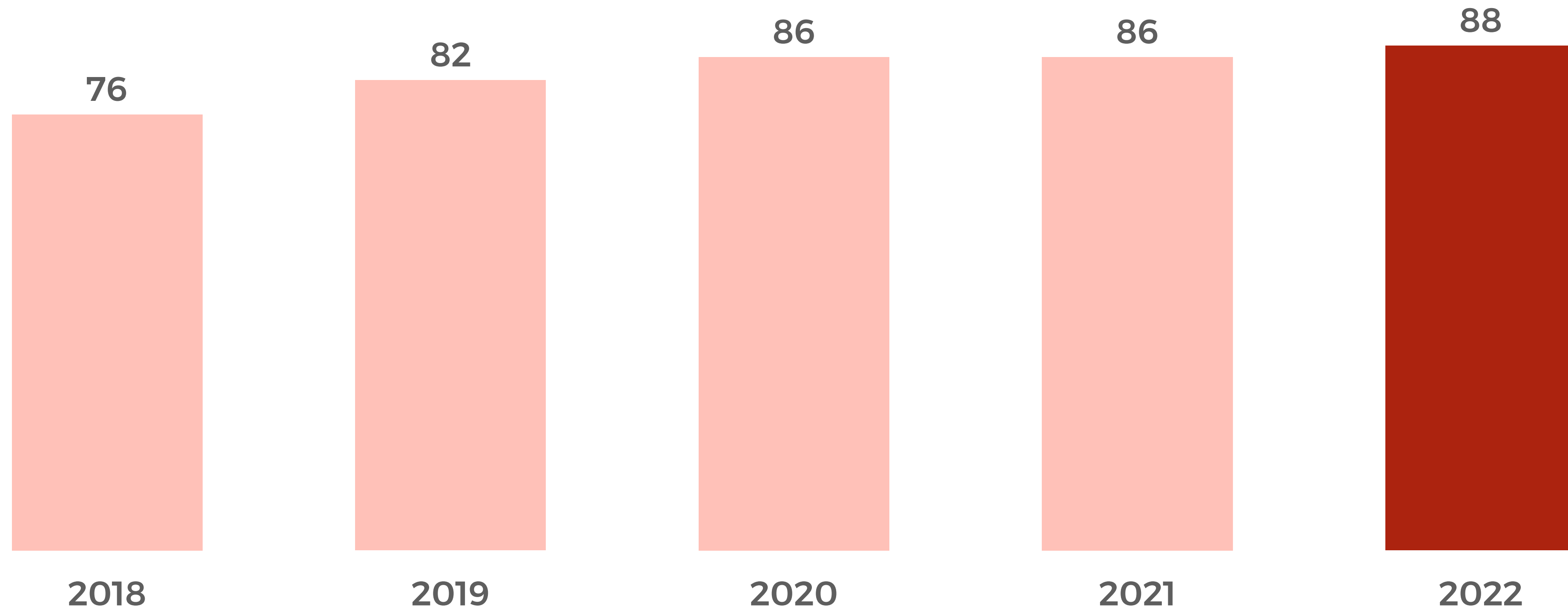
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Smartphone Ownership

TOTAL CANADIAN POPULATION 18+

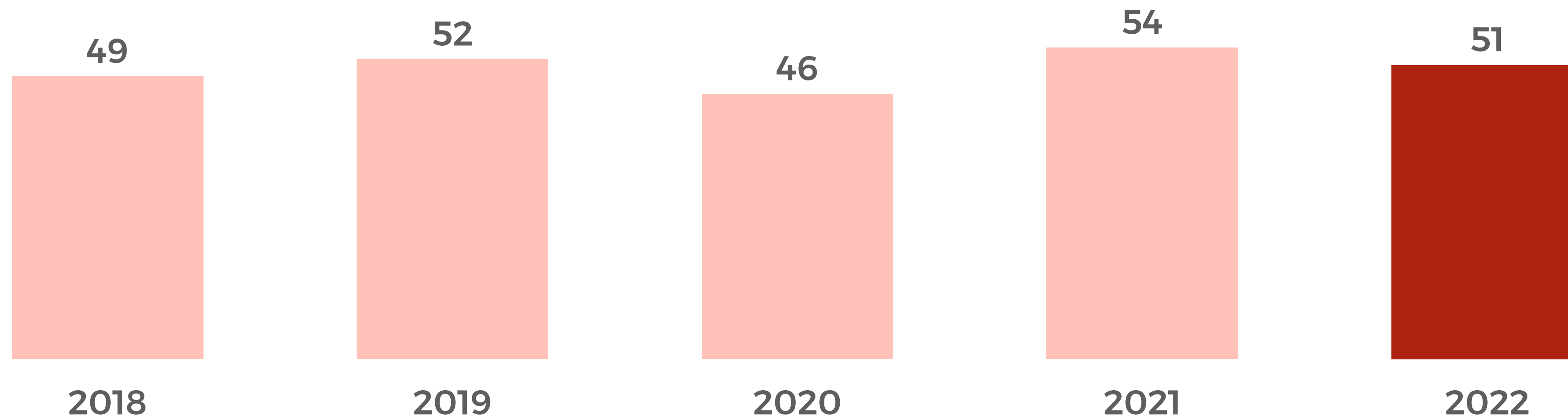
% OWNING A SMARTPHONE



Tablet Ownership

TOTAL CANADIAN POPULATION 18+

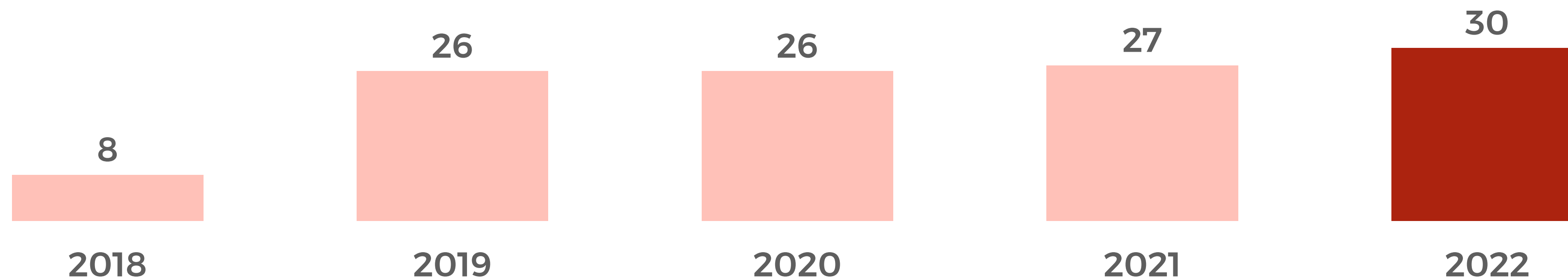
% OWNING A TABLET



Smart Speaker Ownership

TOTAL CANADIAN POPULATION 18+

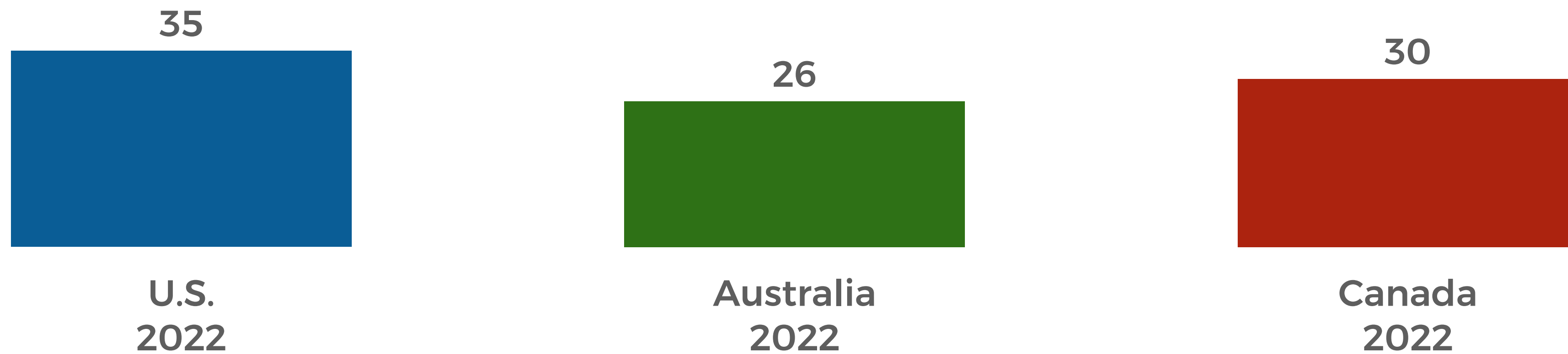
% OWN ANY SMART SPEAKER



Smart Speaker Ownership

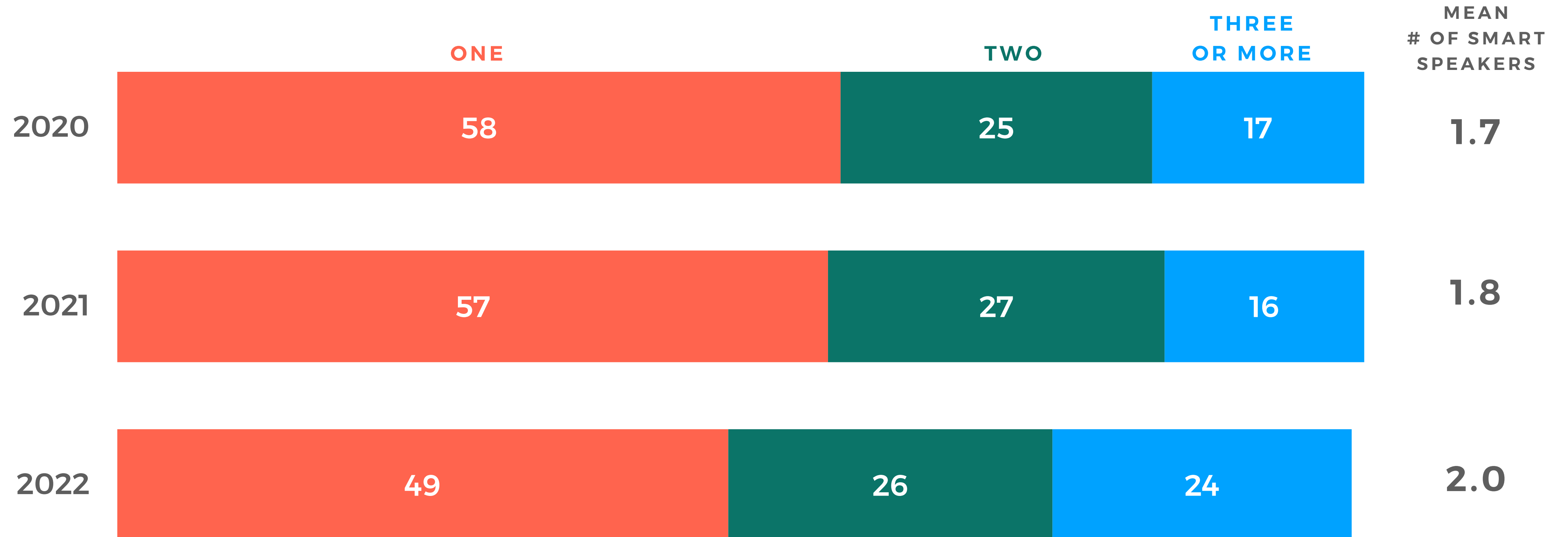
POPULATIONS 18+

% OWN ANY SMART SPEAKER



Number of Smart Speakers in Household

BASE: CANADIAN AGE 18+ SMART SPEAKER OWNERS





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Online Audio



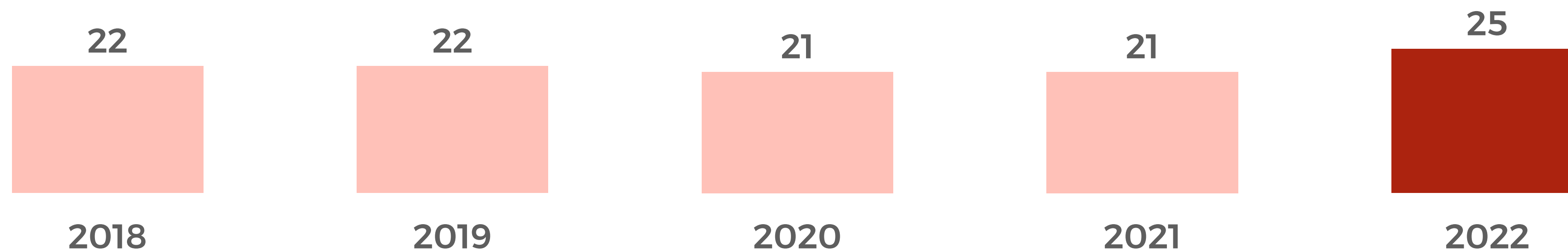
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Listening to AM/FM Radio Online in Last Month

TOTAL CANADIAN POPULATION 18+

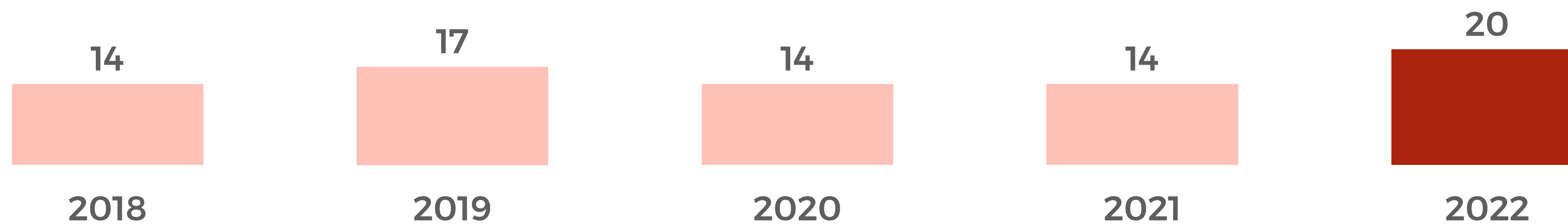
% LISTENED TO AM/FM RADIO ONLINE IN LAST MONTH



Listening to AM/FM Radio Online in Last Week

TOTAL CANADIAN POPULATION 18+

% LISTENED TO AM/FM RADIO ONLINE IN LAST WEEK

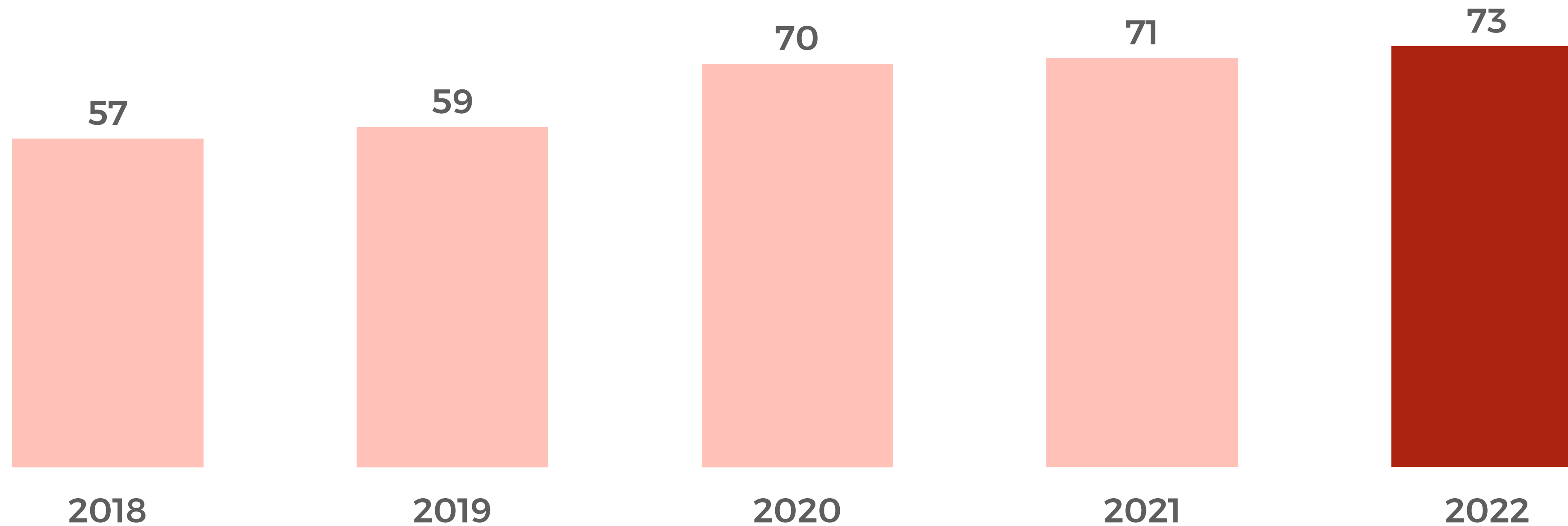


Monthly Online Audio Listening

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

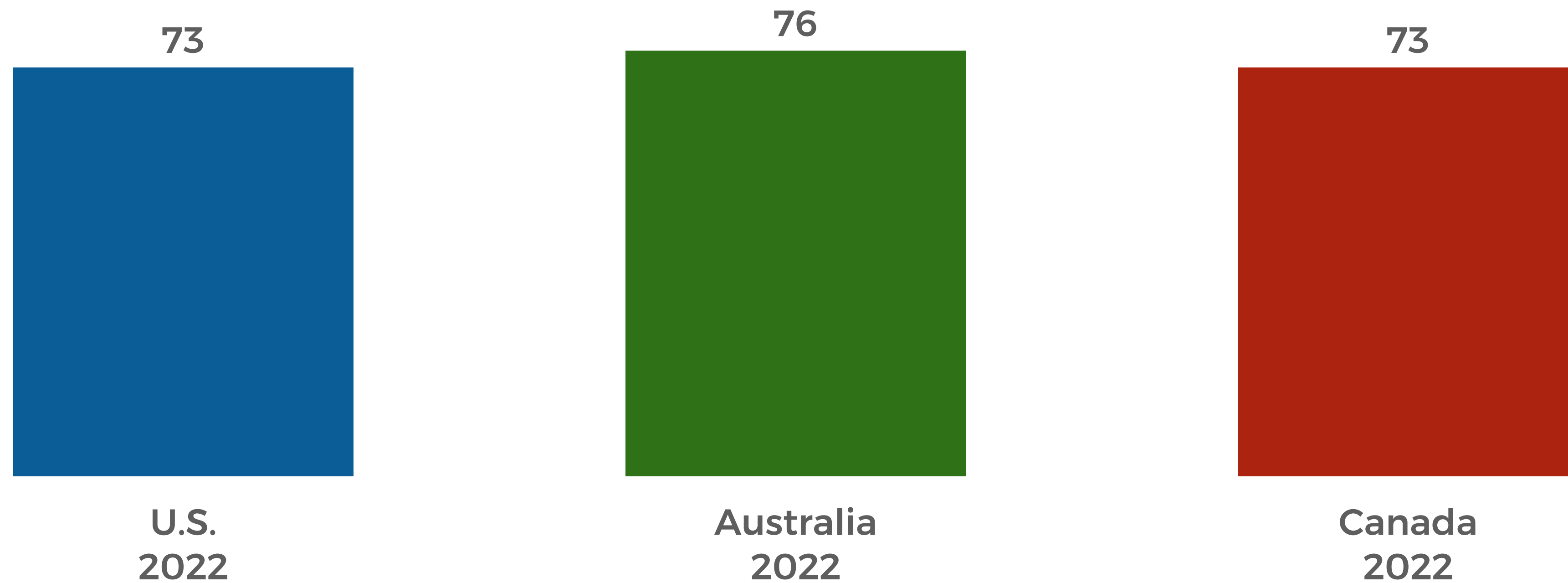


Monthly Online Audio Listening

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

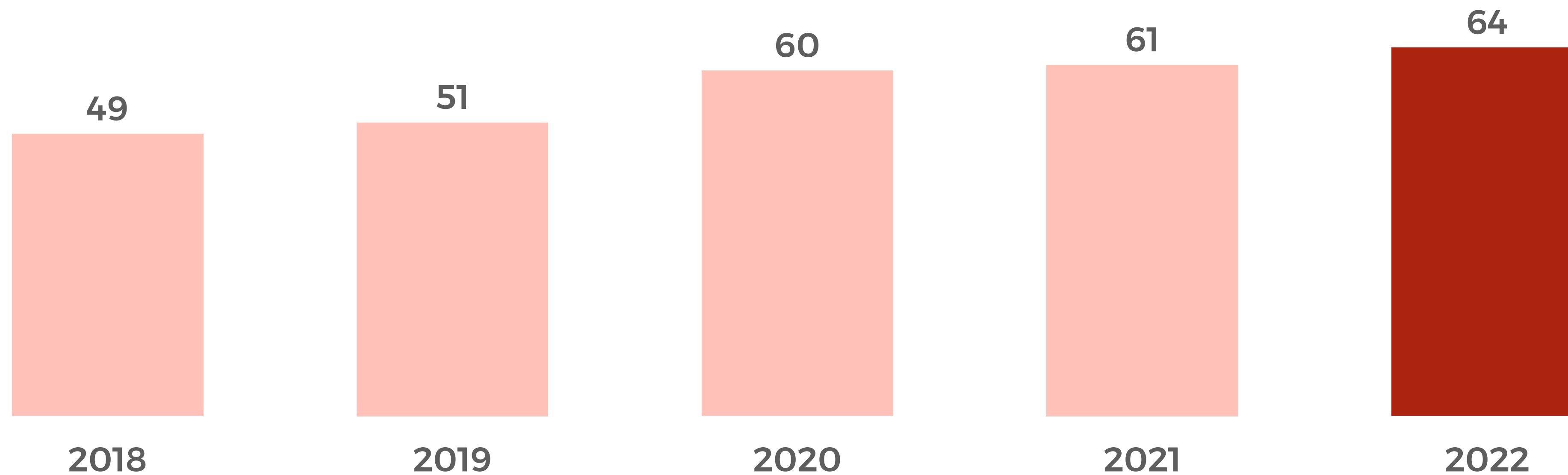


Weekly Online Audio Listening

TOTAL CANADIAN POPULATION 18+

% LISTENED TO ONLINE AUDIO IN LAST WEEK

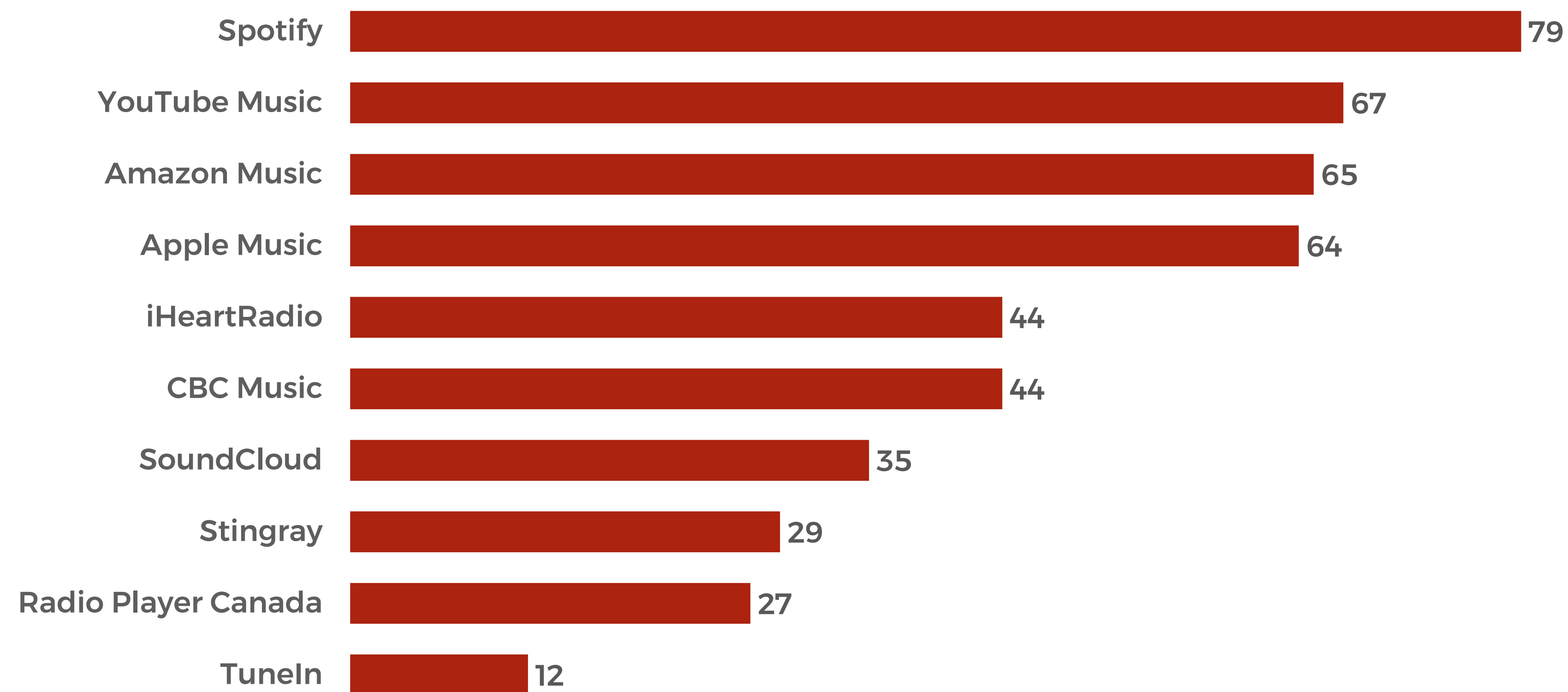
ONLINE AUDIO = LISTENING TO AM/FM RADIO STATIONS ONLINE AND/OR LISTENING TO STREAMED AUDIO CONTENT AVAILABLE ONLY ON THE INTERNET



Online Audio Brand Awareness

TOTAL CANADIAN POPULATION 18+

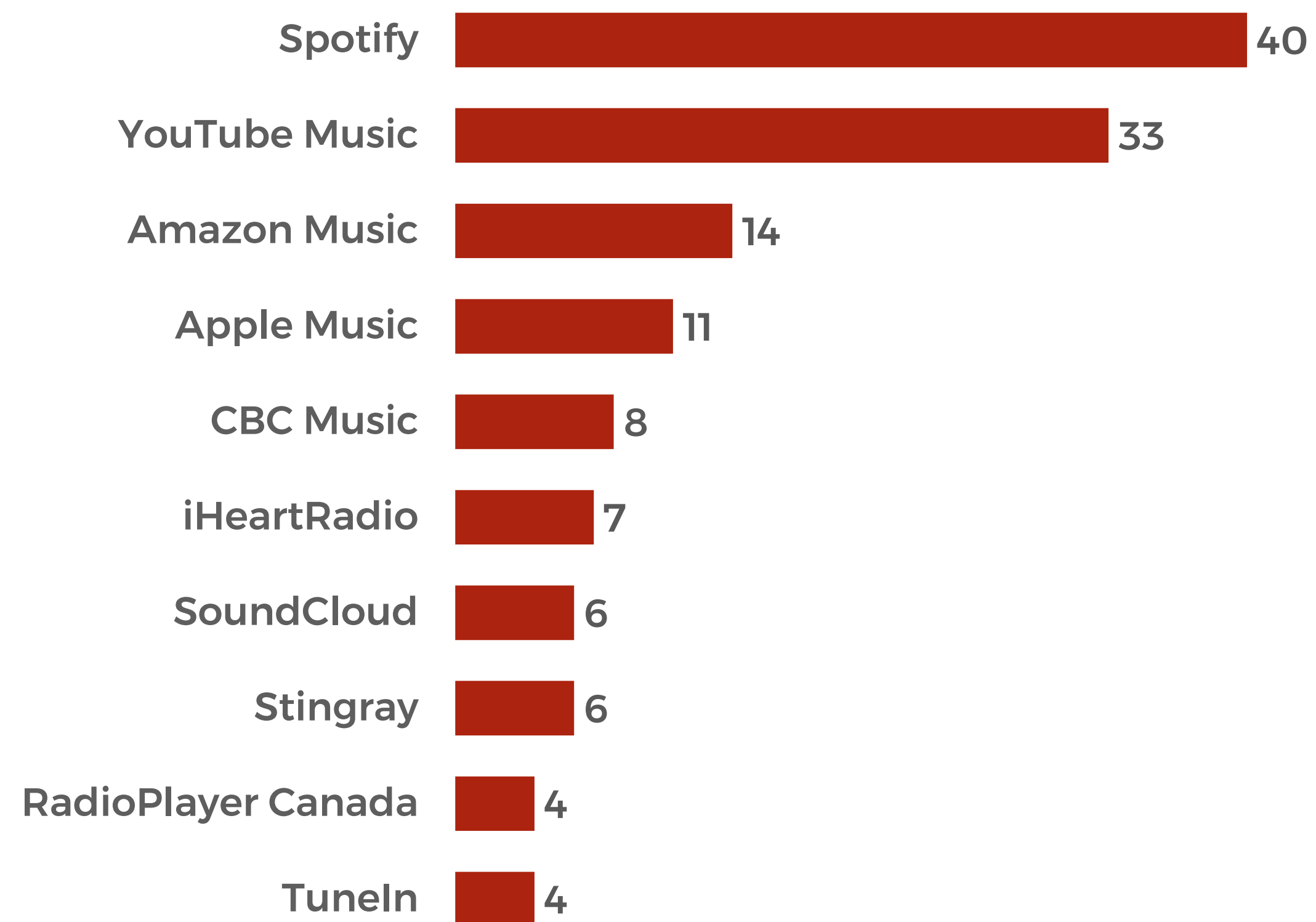
% AWARE OF AUDIO BRAND



Online Audio Brands Used in Last Month

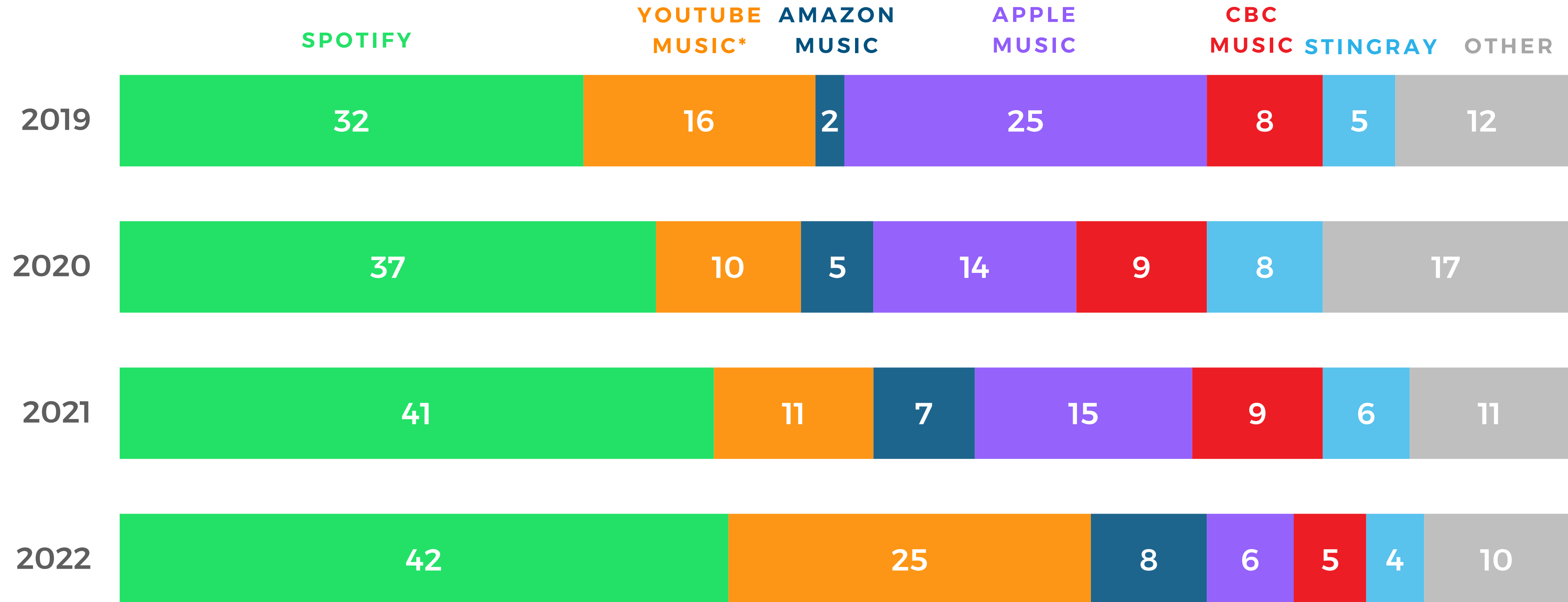
TOTAL CANADIAN POPULATION 18+

% LISTENED TO ONLINE AUDIO BRAND IN LAST MONTH



Online Audio Brand Used Most Often

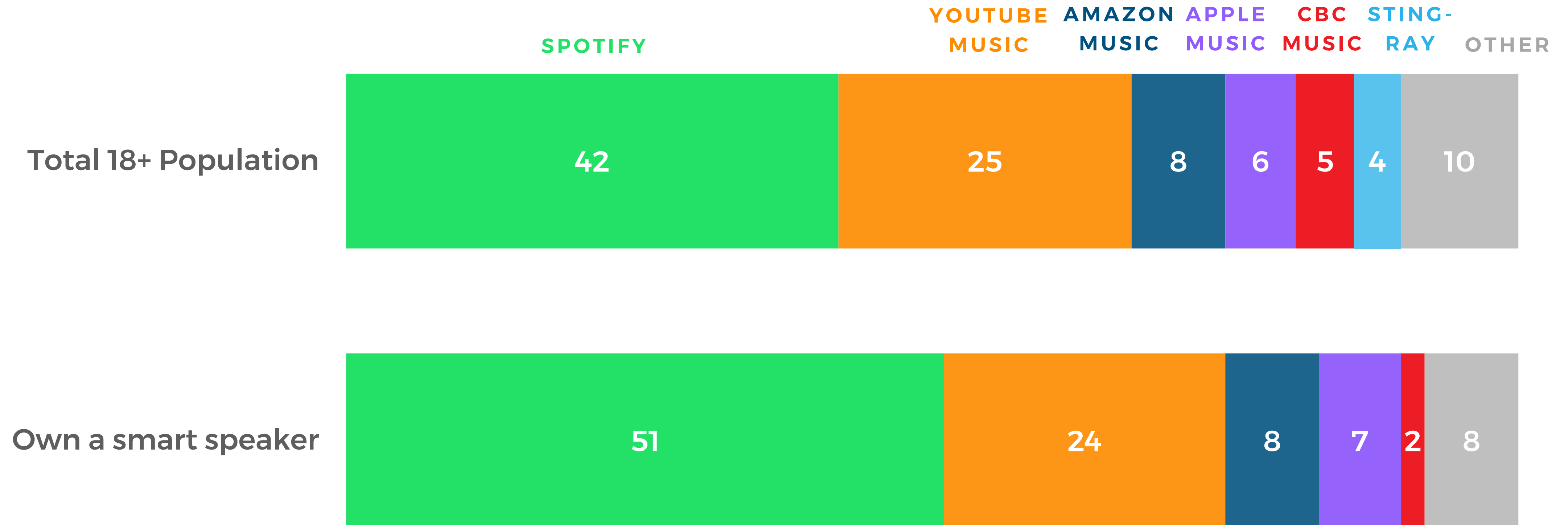
BASE: CANADIAN 18+ AND CURRENTLY EVER USE ANY AUDIO BRAND



2019-2021: ASKED AS "GOOGLE PLAY"

Online Audio Brand Used Most Often

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



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In-Car Audio



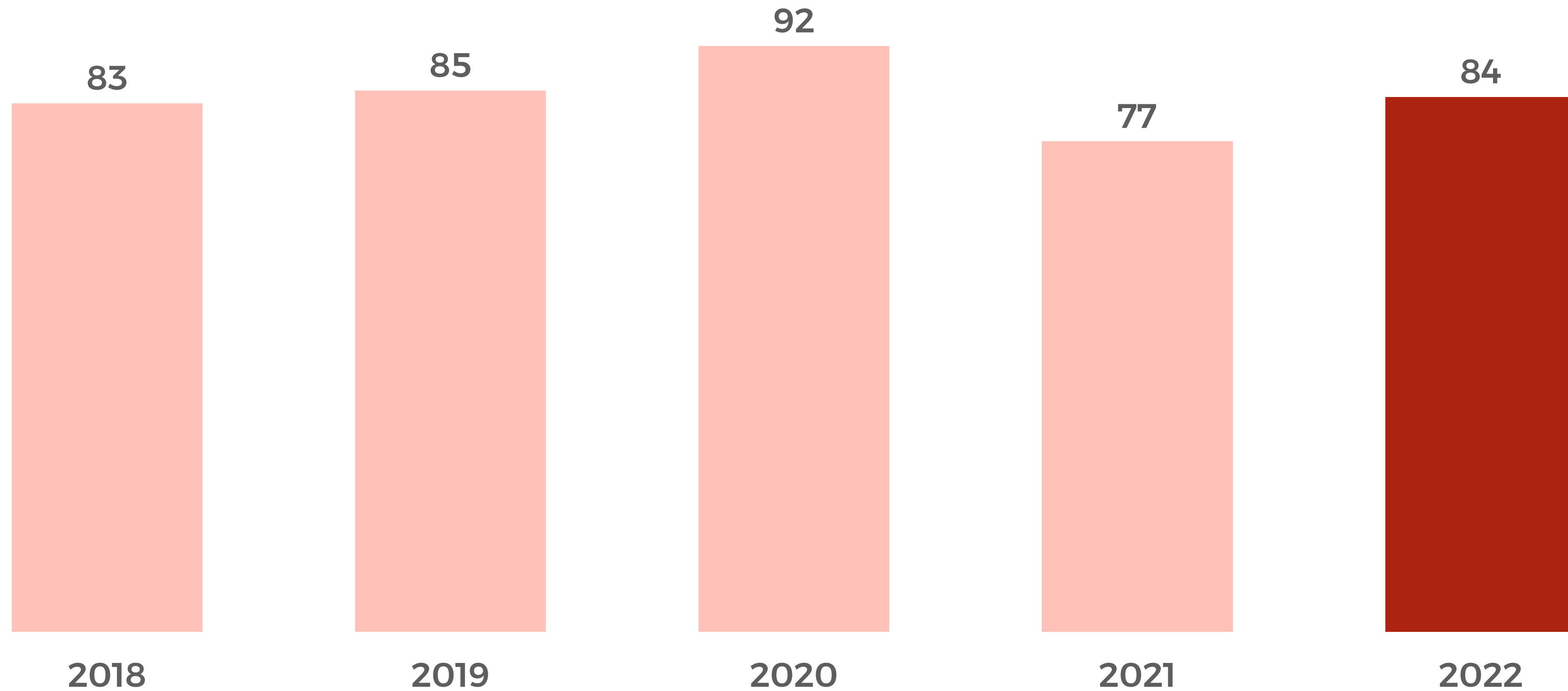
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Driven/Ridden in Car in Last Month

TOTAL CANADIAN POPULATION 18+

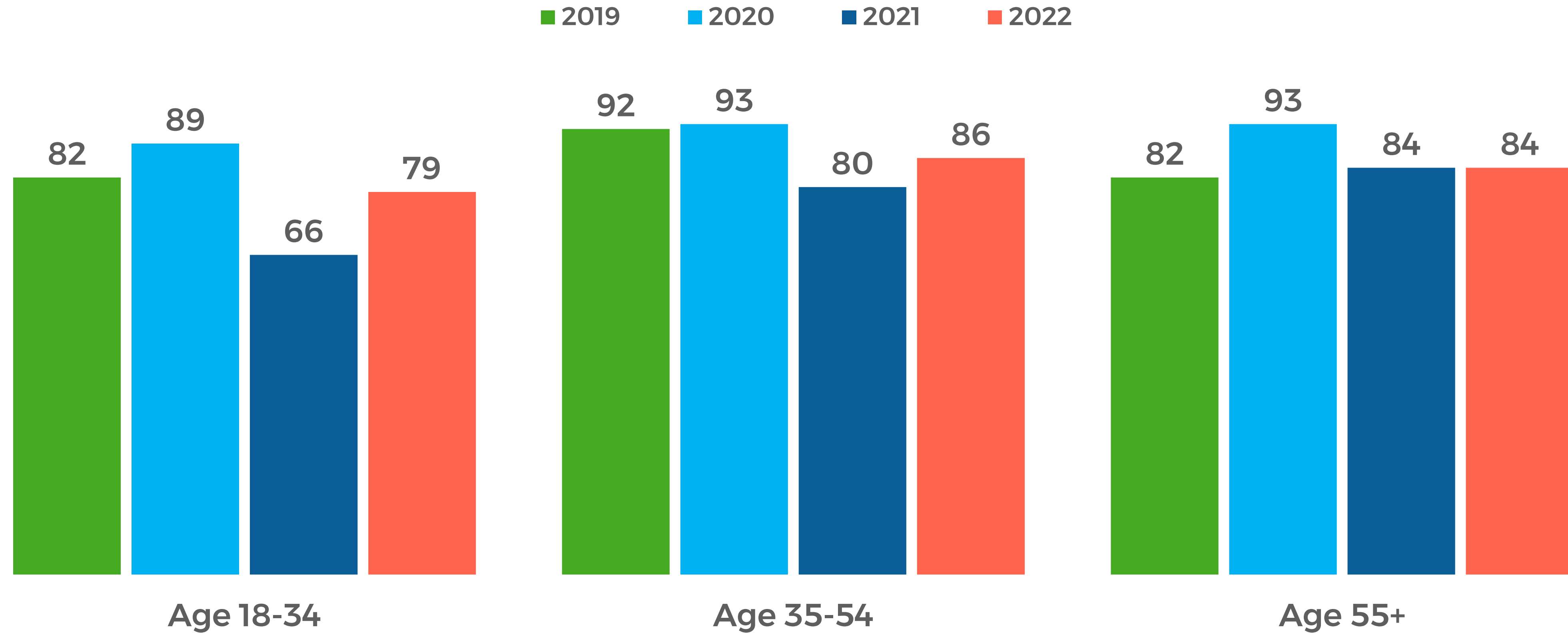
% DRIVING OR RIDING IN CAR/VEHICLE IN LAST MONTH



Driven/Ridden in Car in Last Month

TOTAL CANADIAN POPULATION 18+

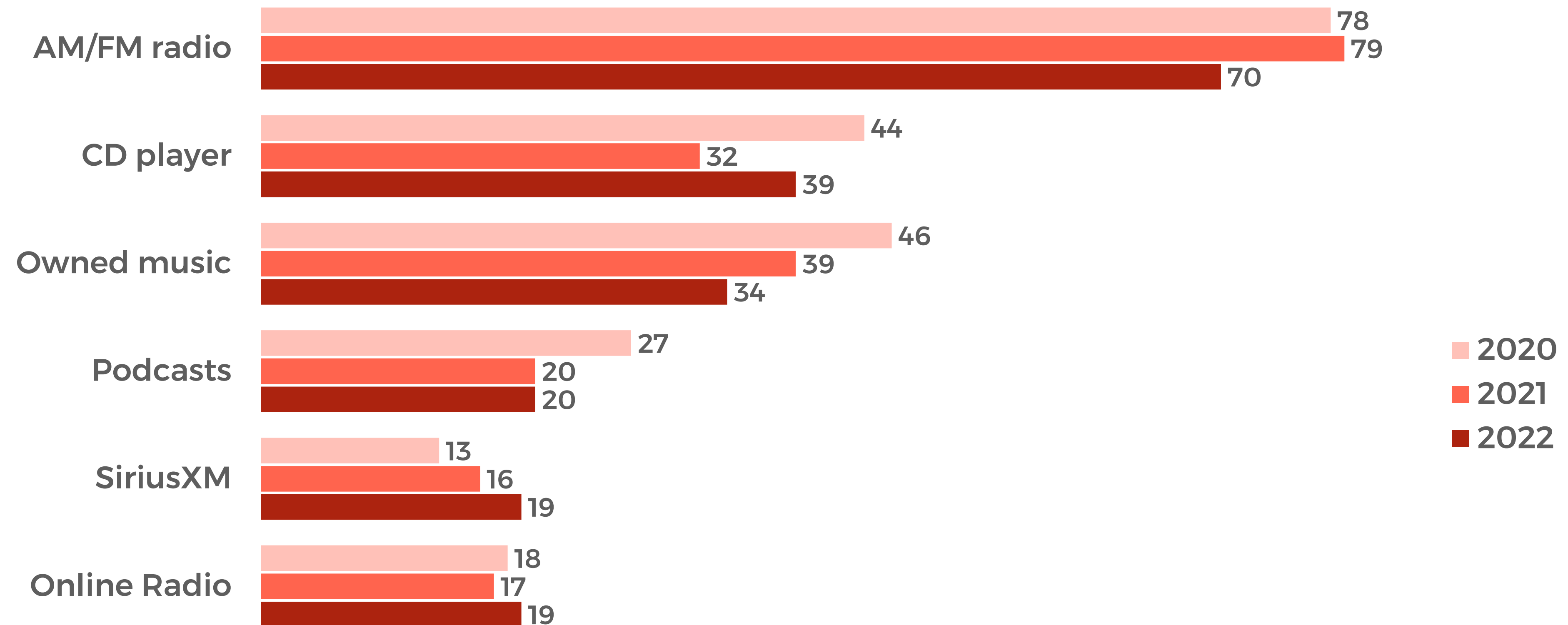
% DRIVING OR RIDING IN CAR/VEHICLE IN LAST MONTH



Audio Sources Used in Car

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

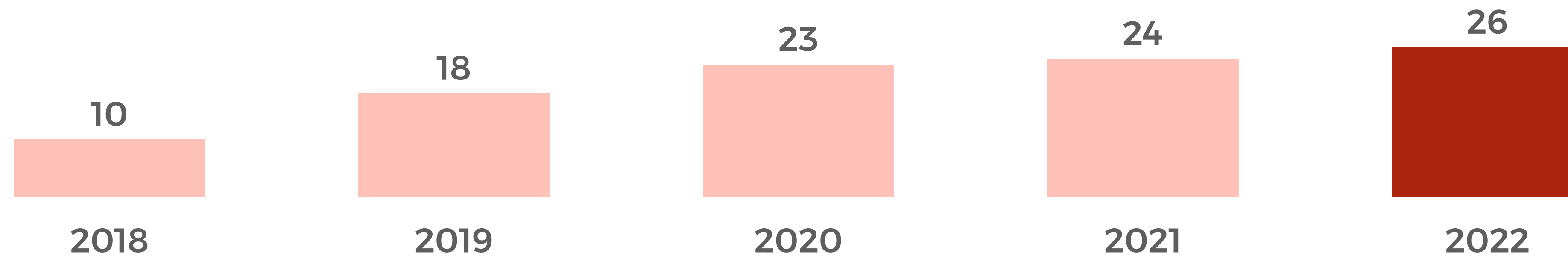
% USING AUDIO SOURCE IN CAR



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



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Podcasting



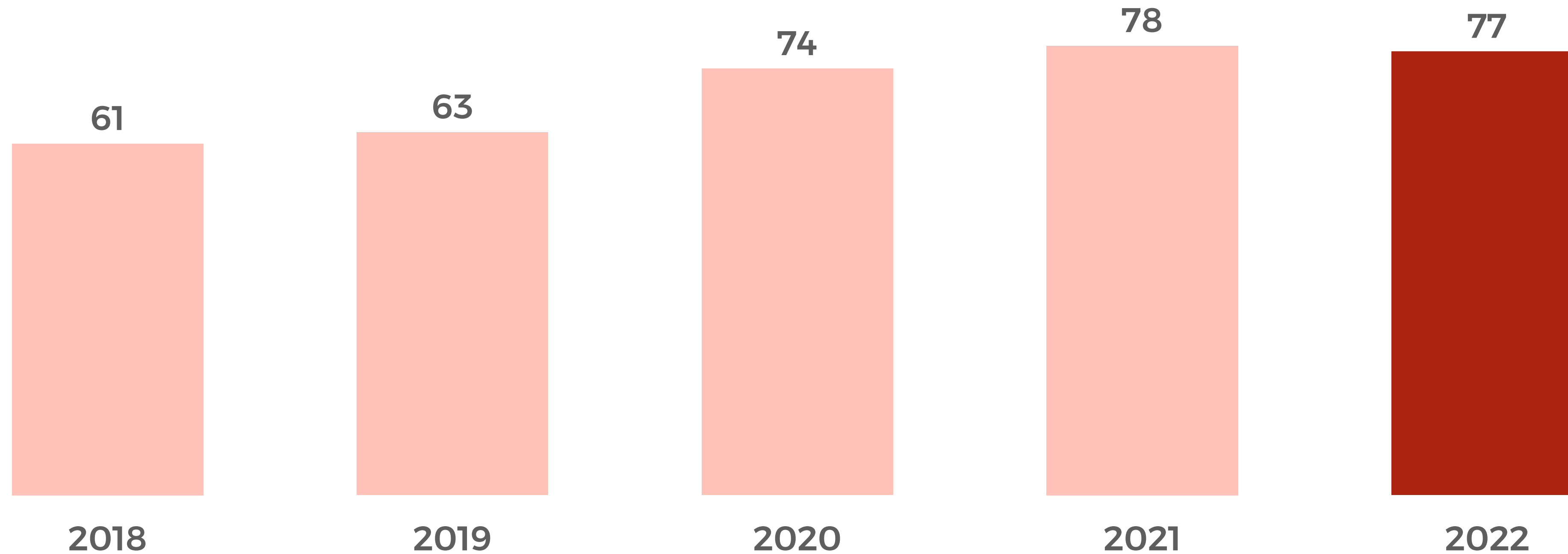
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Podcasting Familiarity

TOTAL CANADIAN POPULATION 18+

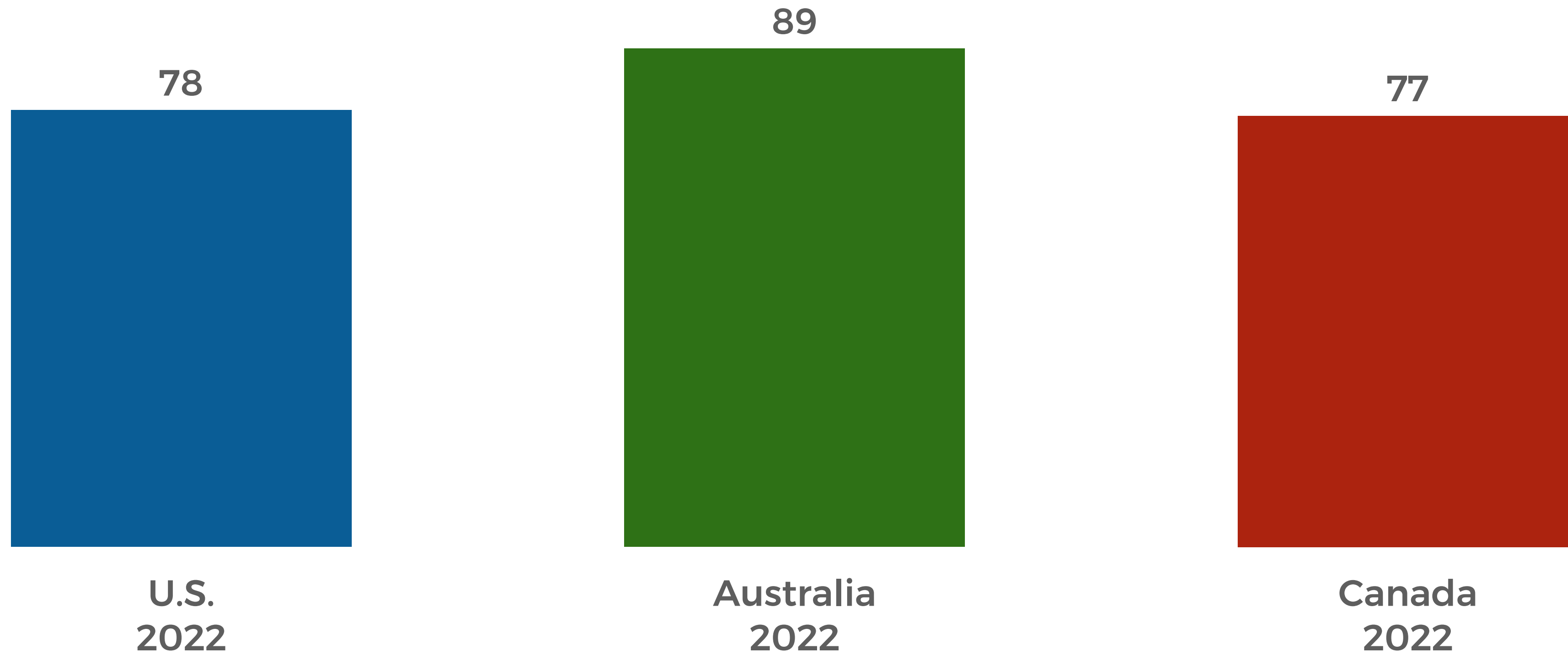
% FAMILIAR WITH THE TERM "PODCAST"



Podcasting Familiarity

POPULATIONS 18+

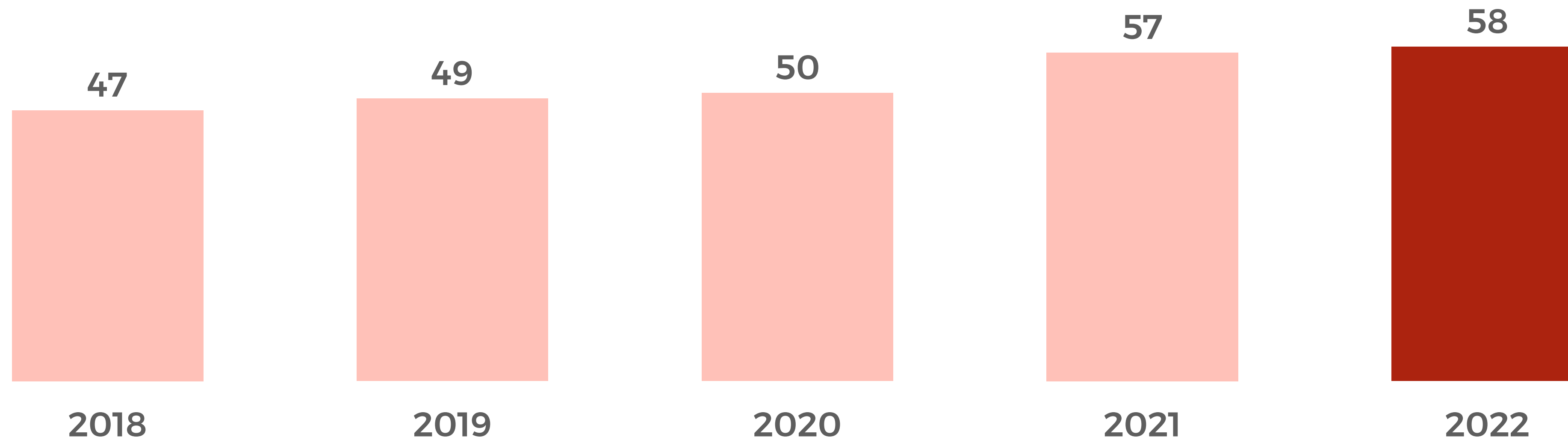
% FAMILIAR WITH THE TERM "PODCASTING"



Podcast Listening

TOTAL CANADIAN POPULATION 18+

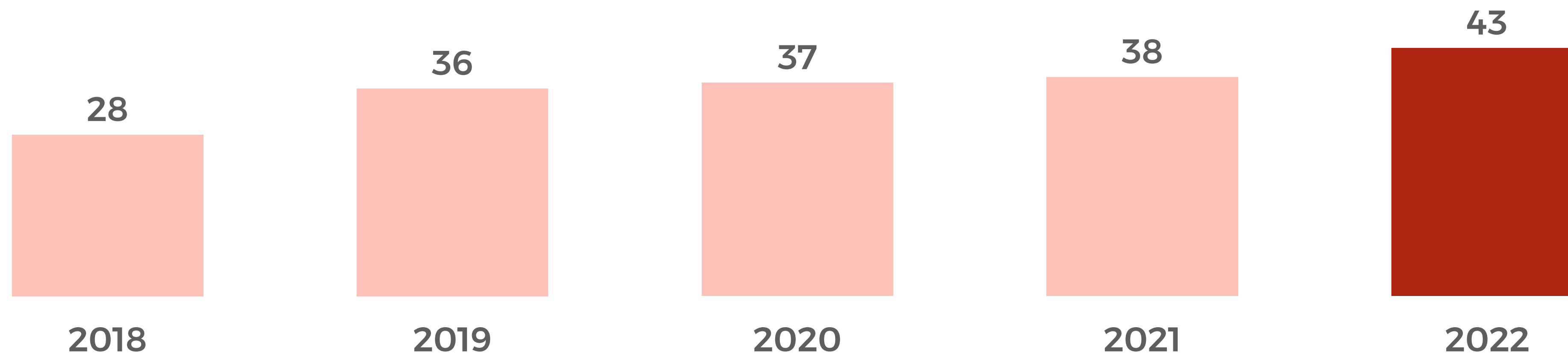
% EVER LISTENED TO A PODCAST



Monthly Podcast Listening

TOTAL CANADIAN POPULATION 18+

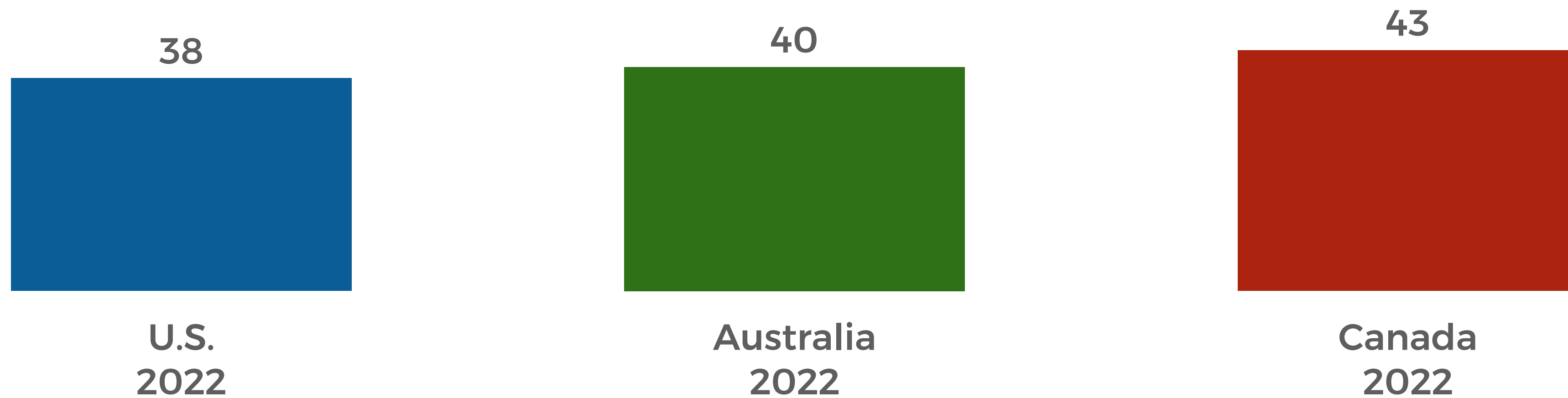
% LISTENED TO A PODCAST IN LAST MONTH



Monthly Podcast Listening

POPULATIONS 18+

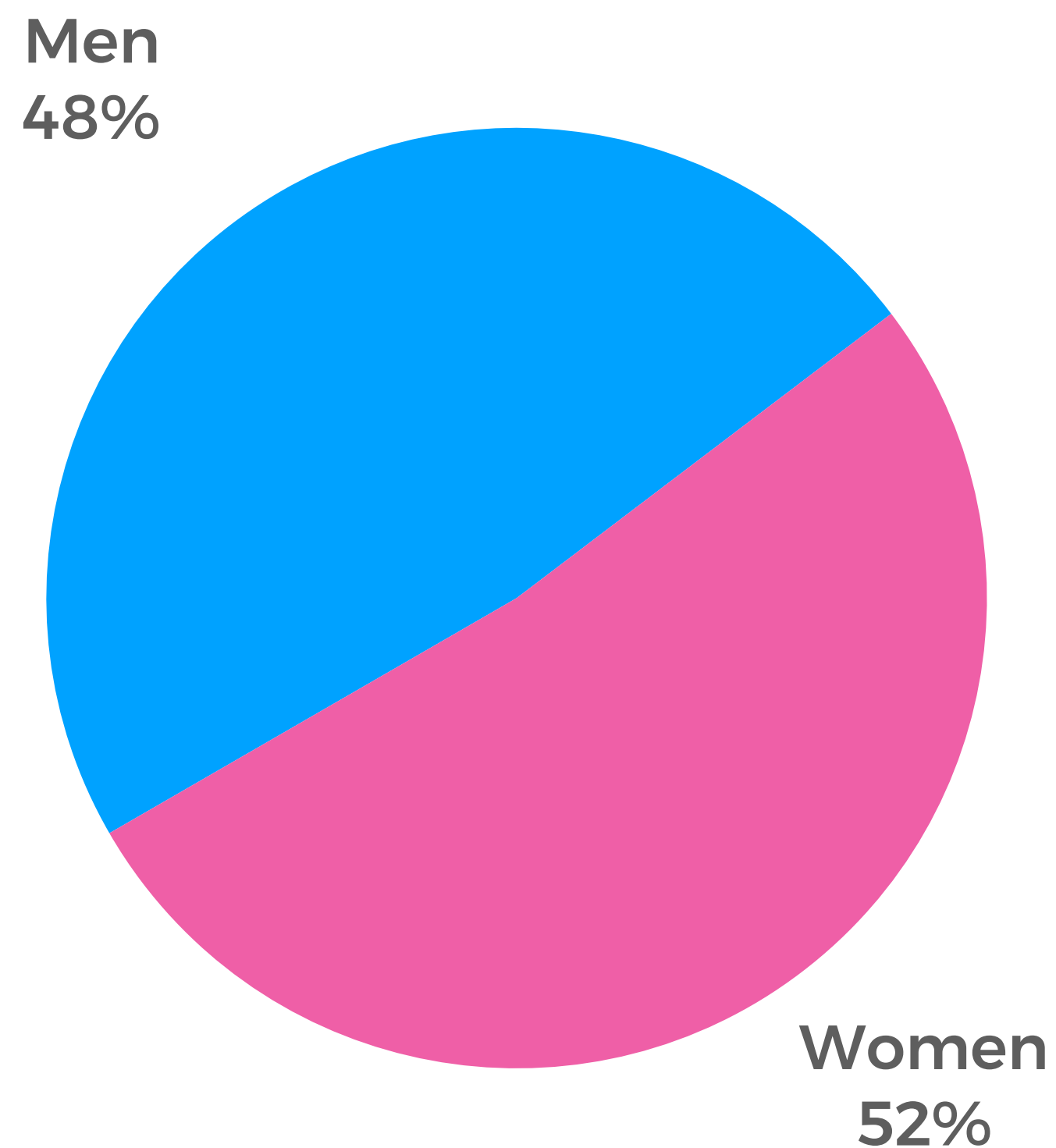
% LISTENED TO A PODCAST IN LAST MONTH



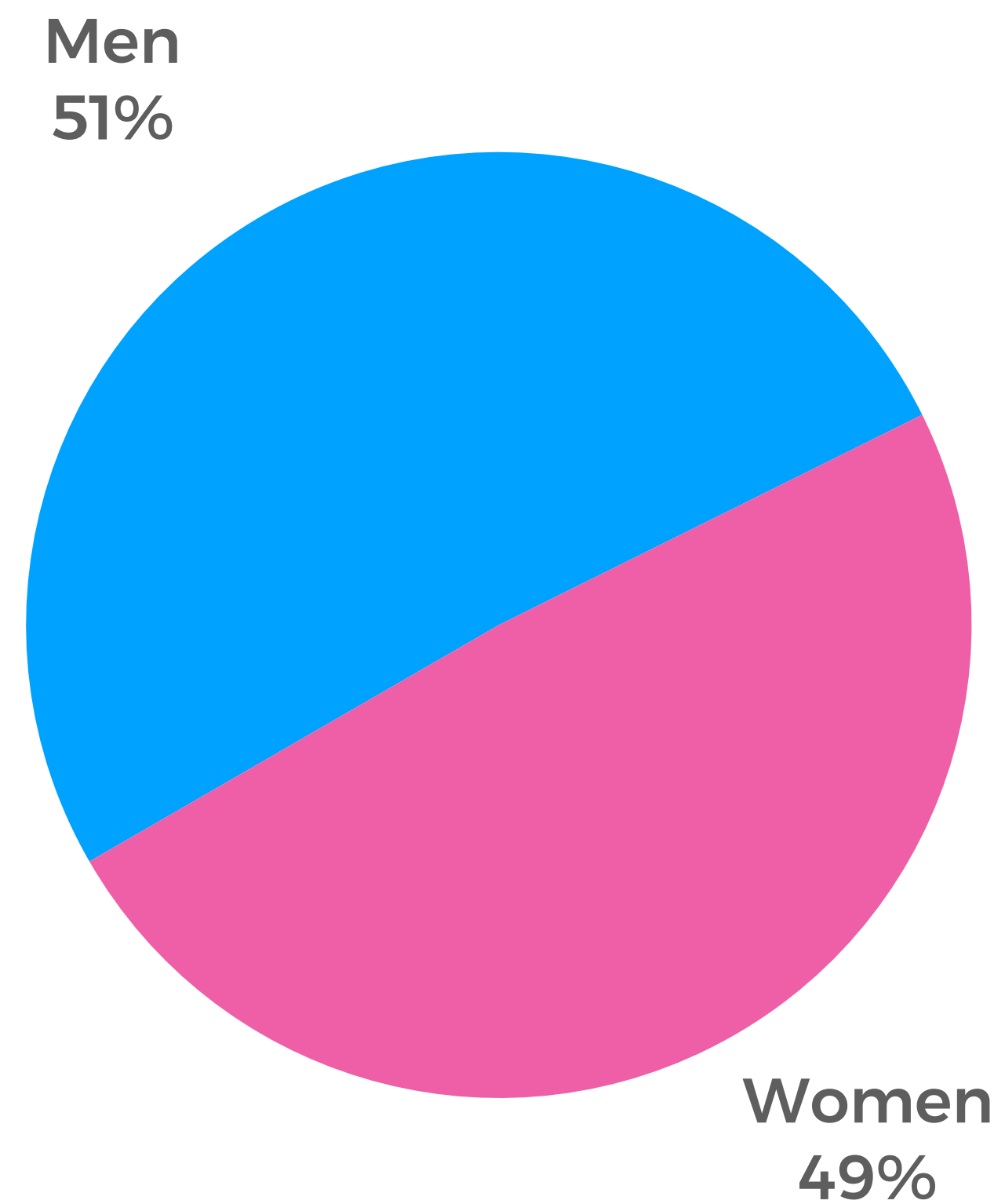
Gender of Monthly Podcast Listeners

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

CANADIAN POPULATION 18+



MONTHLY PODCAST CONSUMERS 18+

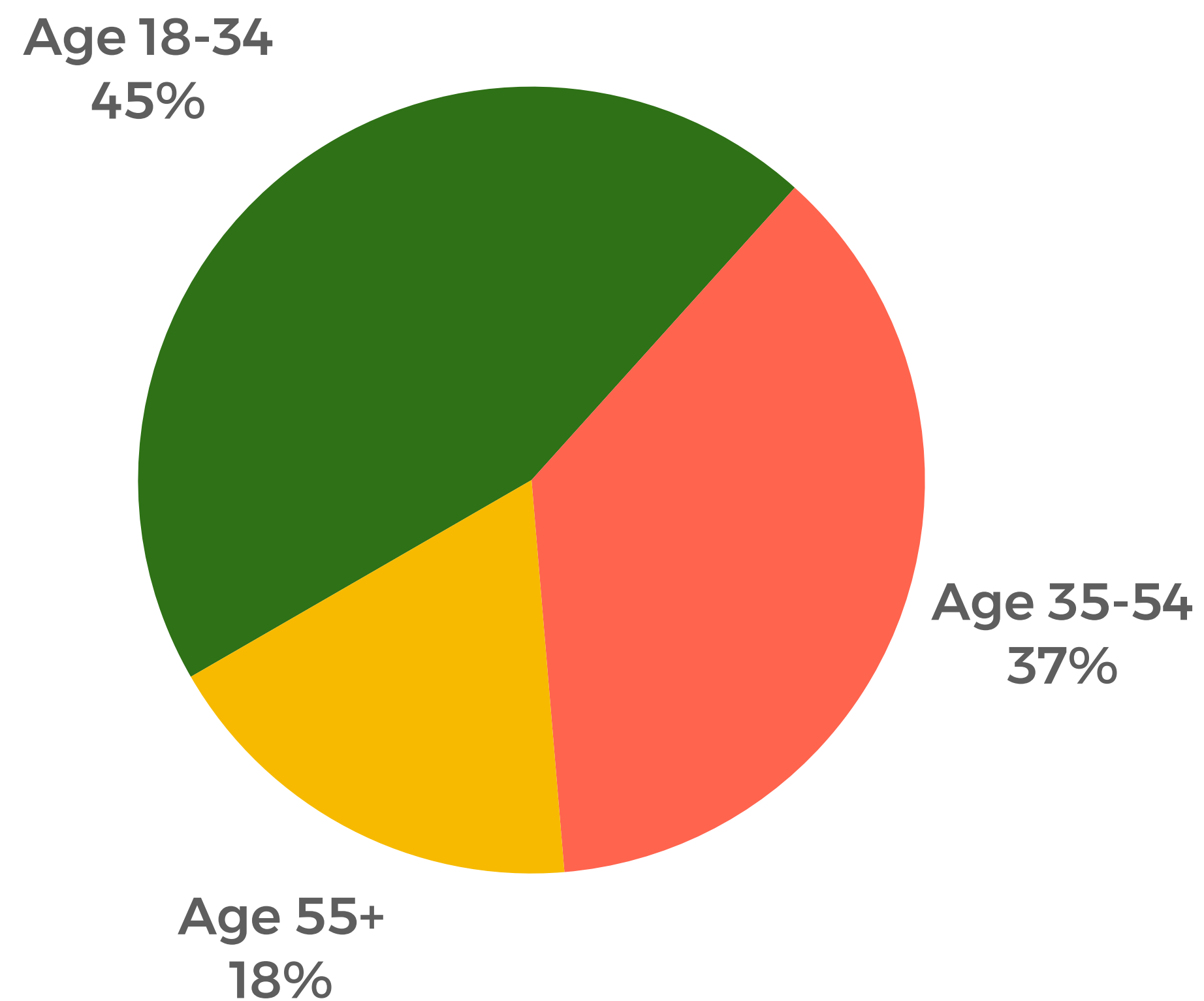
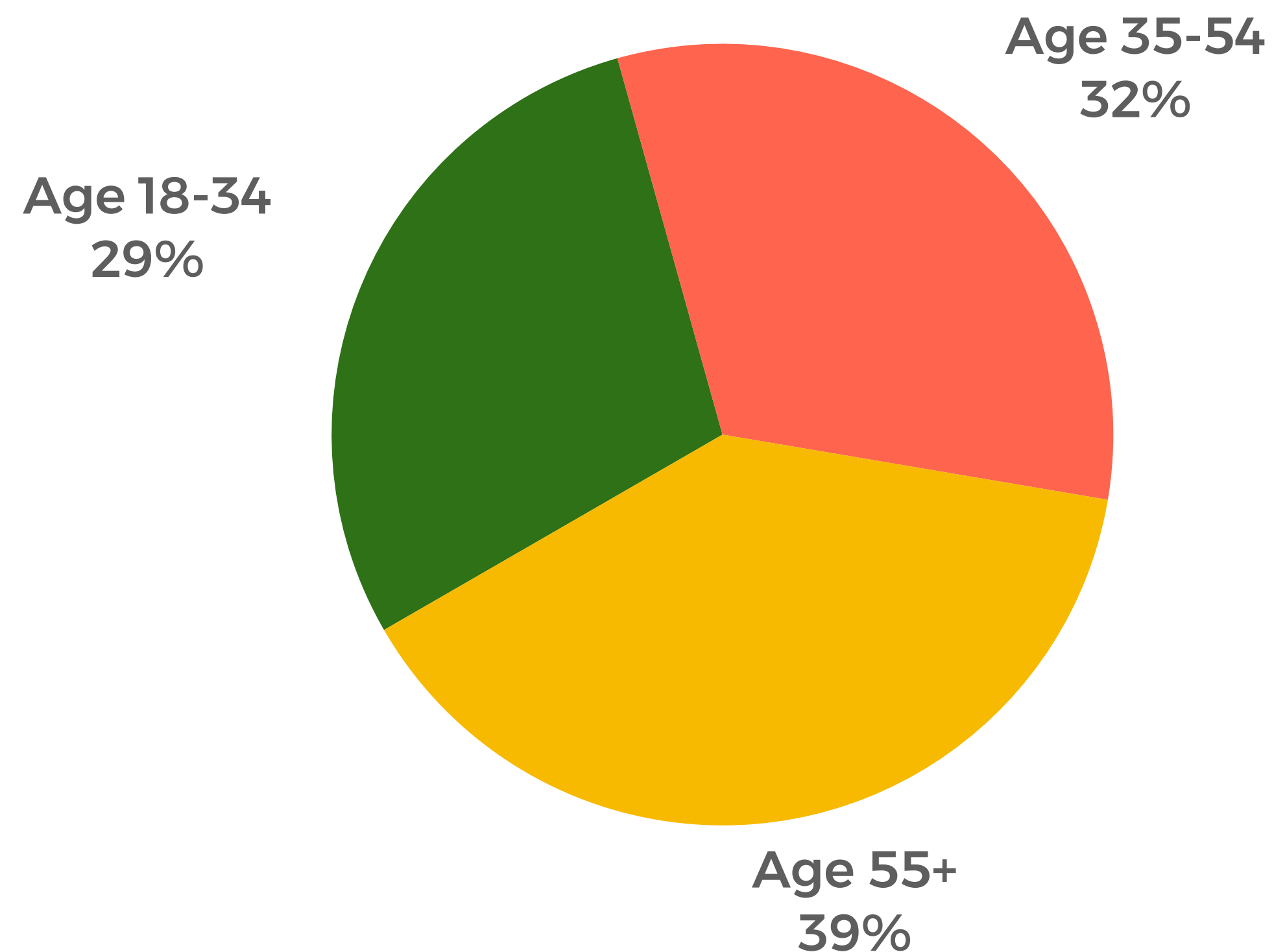


Age of Monthly Podcast Listeners

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

CANADIAN POPULATION 18+

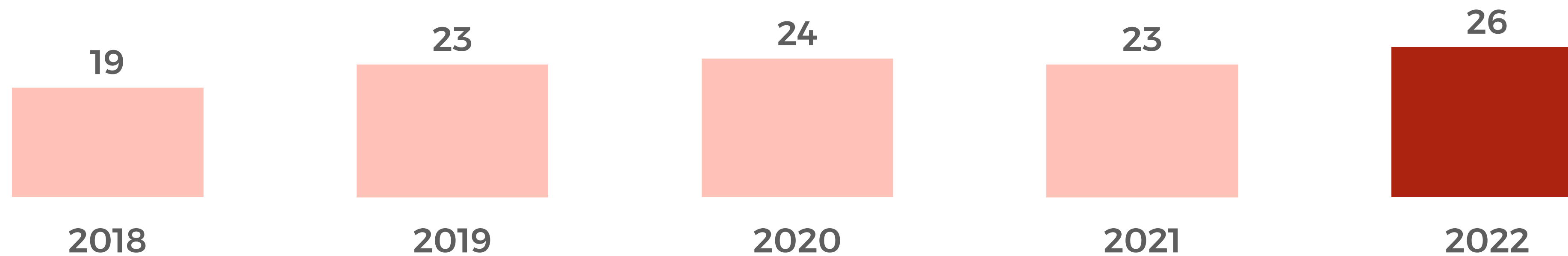
MONTHLY PODCAST CONSUMERS 18+



Weekly Podcast Listening

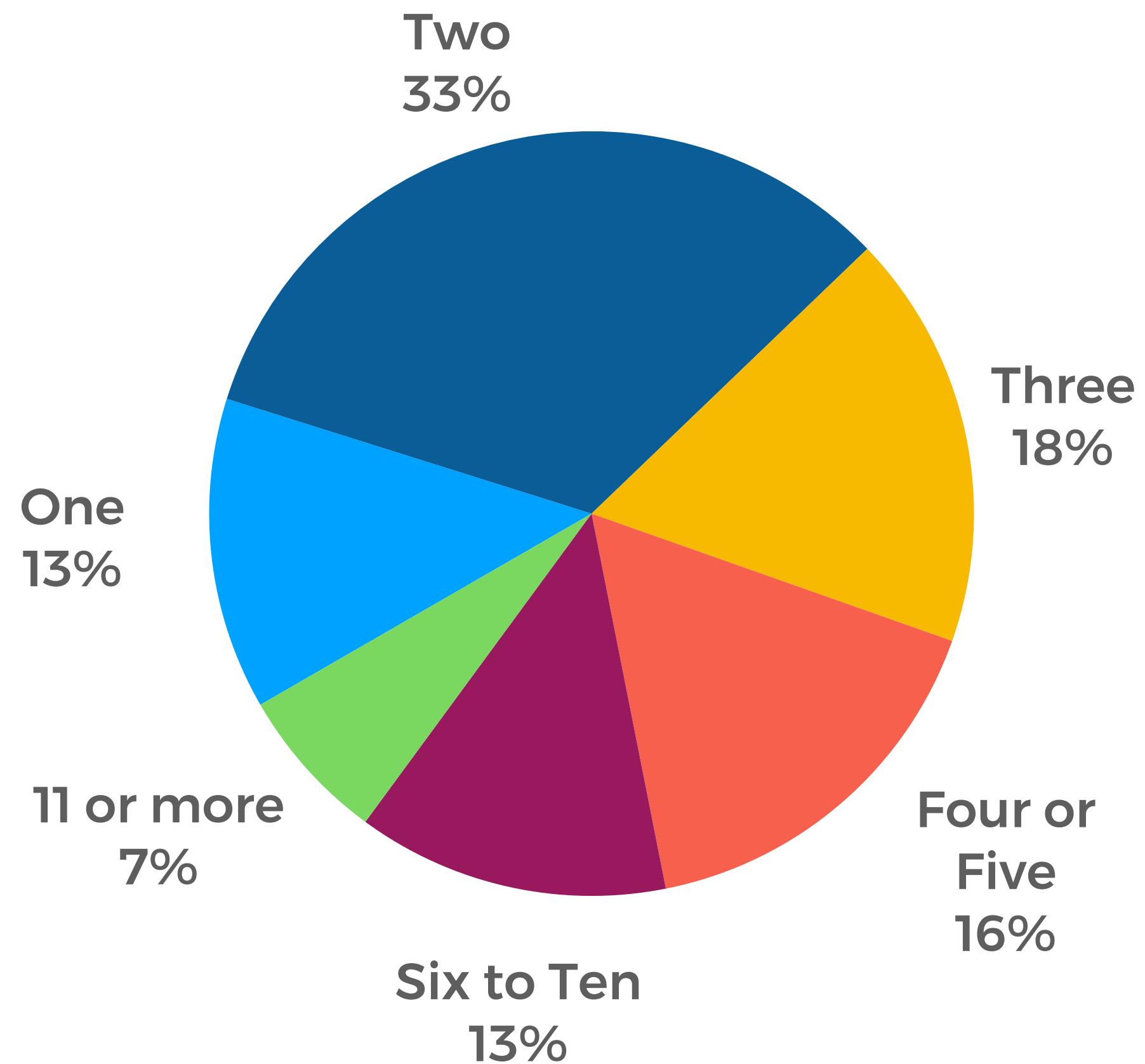
TOTAL CANADIAN POPULATION 18+

% LISTENED TO A PODCAST IN LAST WEEK



Number of Podcast Episodes Listened to in Last Week

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

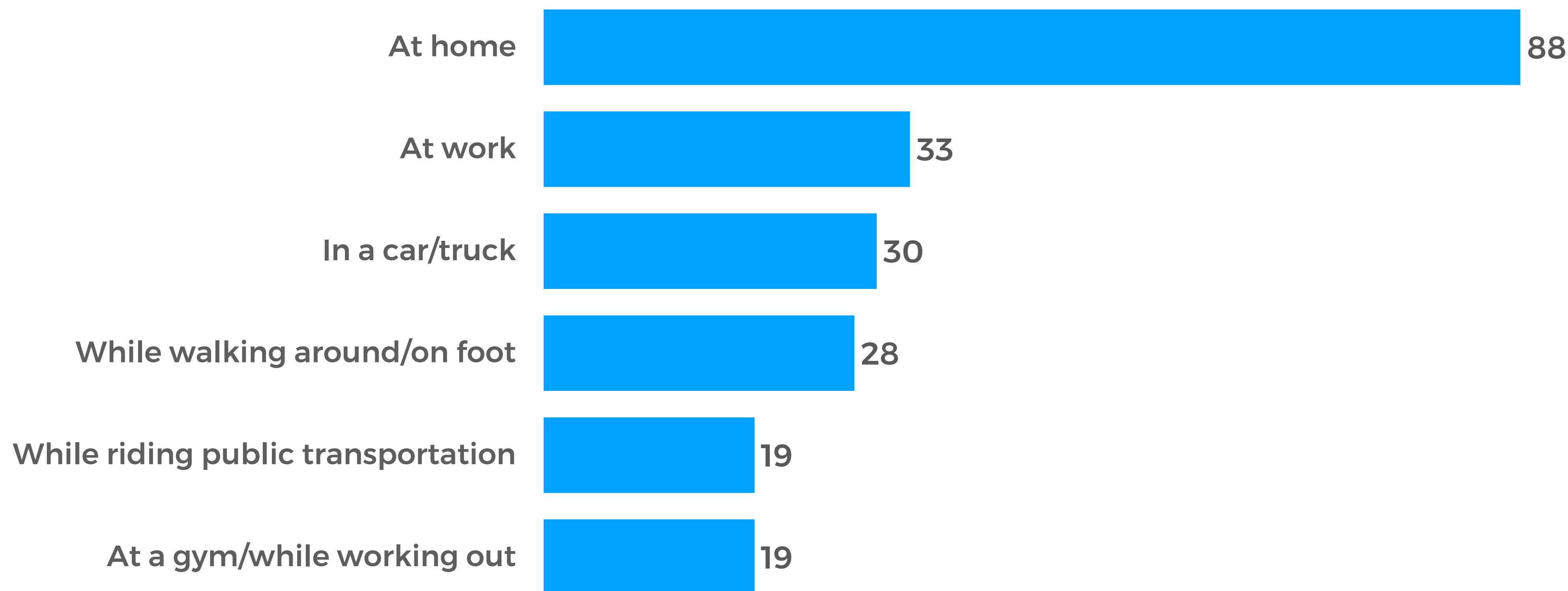


Canadian weekly podcast listeners averaged
five episodes
in the last week

Podcast Listening Locations

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

% EVER LISTEN TO A PODCAST IN LOCATION

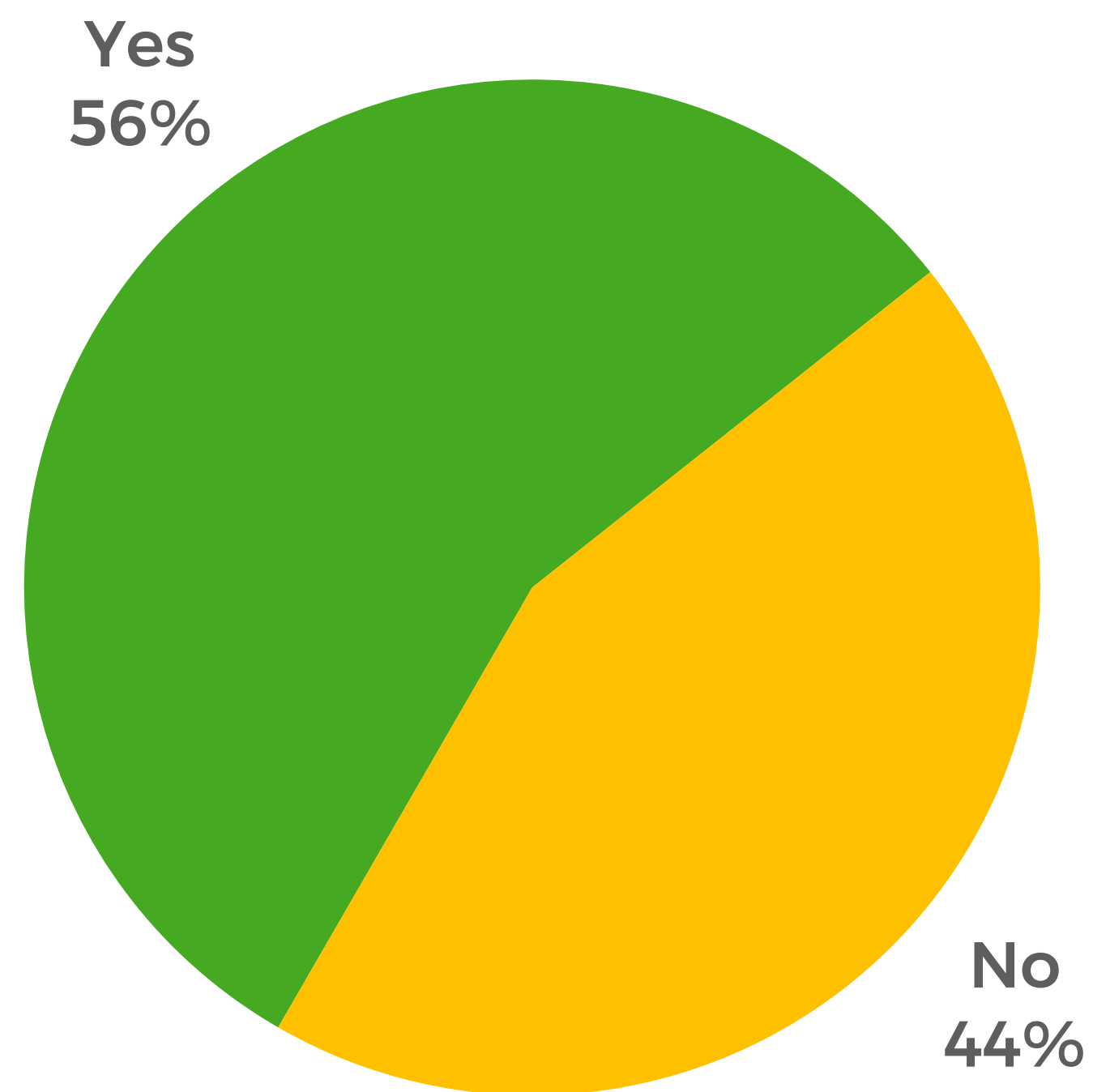


Listening to Podcasts from Canadian Producers

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

% LISTENED TO PODCASTS PRODUCED IN CANADA

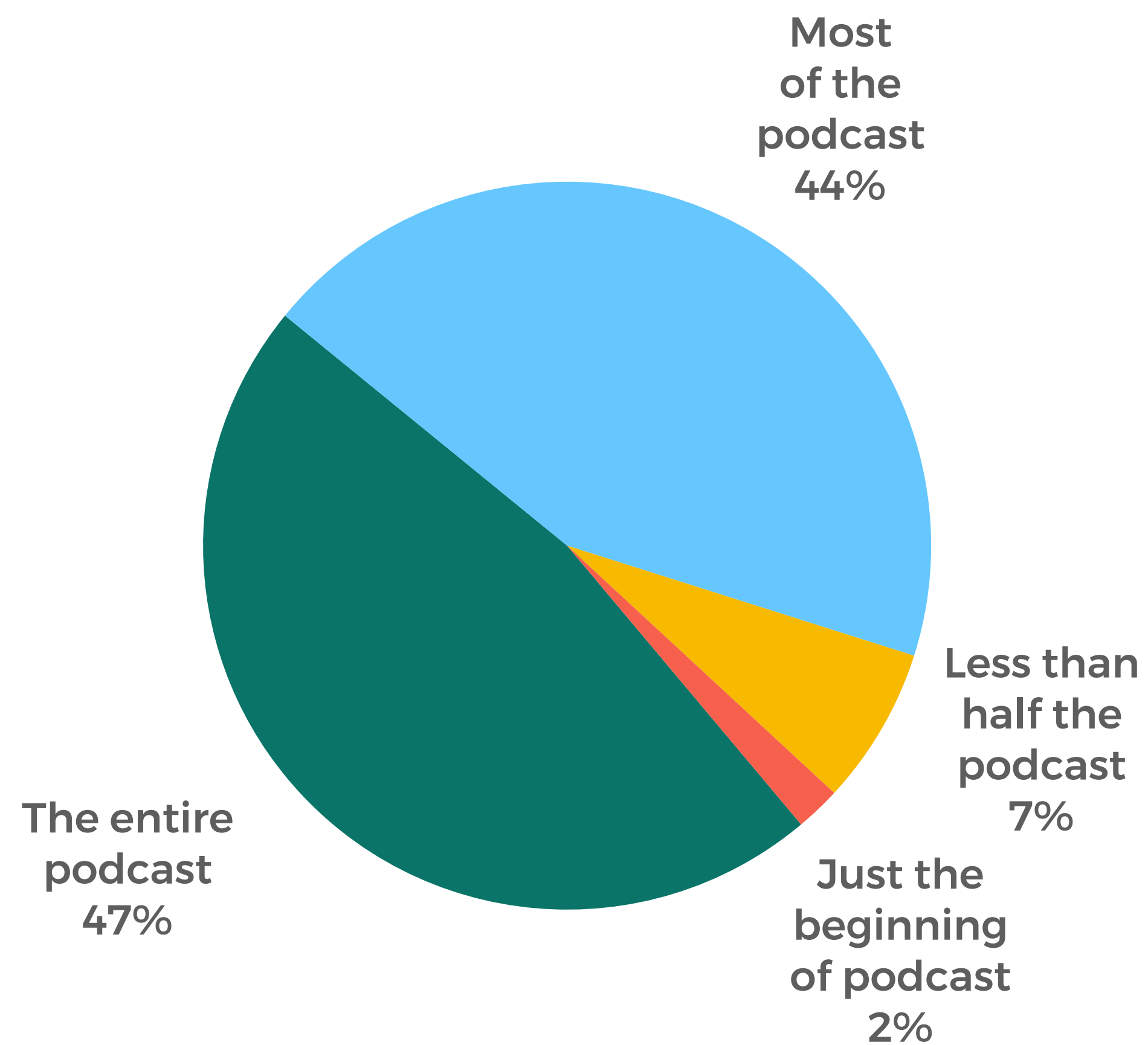
“Do you currently ever listen to any podcasts that you know are produced in Canada?”



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...?”



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

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