The Infinite Dial
Canada 2021

#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 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

<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>
</tbody>
</table>
Tablet Ownership

TOTAL CANADIAN POPULATION 18+

% OWNING A TABLET

<table>
<thead>
<tr>
<th>Year</th>
<th>Ownership (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018</td>
<td>49</td>
</tr>
<tr>
<td>2019</td>
<td>52</td>
</tr>
<tr>
<td>2020</td>
<td>46</td>
</tr>
<tr>
<td>2021</td>
<td>54</td>
</tr>
</tbody>
</table>
Smart Speaker Awareness

TOTAL CANADIAN POPULATION 18+

% AWARE OF SMART SPEAKERS

2018: 60%
2019: 65%
2020: 77%
2021: 77%

THE INFINITE DIAL CANADA 2021
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Smart Speaker Ownership

TOTAL CANADIAN POPULATION 18+

% OWN ANY SMART SPEAKER

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

POPULATIONS 18+
% OWN ANY SMART SPEAKER

U.S. 2021: 32%
Australia 2021: 26%
Canada 2021: 27%

THE INFINITE DIAL
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Number of Smart Speakers in Household

BASE: CANADIAN AGE 18+ SMART SPEAKER OWNERS

<table>
<thead>
<tr>
<th></th>
<th>ONE</th>
<th>TWO</th>
<th>THREE OR MORE</th>
<th>MEAN # OF SMART SPEAKERS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Can 2020</td>
<td>58</td>
<td>25</td>
<td>17</td>
<td>1.7</td>
</tr>
<tr>
<td>Can 2021</td>
<td>57</td>
<td>27</td>
<td>16</td>
<td>1.8</td>
</tr>
</tbody>
</table>
Online Audio
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

<table>
<thead>
<tr>
<th>Year</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018</td>
<td>67</td>
</tr>
<tr>
<td>2019</td>
<td>65</td>
</tr>
<tr>
<td>2020</td>
<td>69</td>
</tr>
<tr>
<td>2021</td>
<td>70</td>
</tr>
</tbody>
</table>
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
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%
Monthly Online Audio Listening

TOTAL CANADIAN POPULATION 18+

% LISTENED TO ONLINE AUDIO IN LAST MONTH

ONLINE AUDIO IS 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>
</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>
</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. 2021

67

Australia 2021

72

Canada 2021

71
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

2018: 49%
2019: 51%
2020: 60%
2021: 61%
Online Audio Brand Awareness

TOTAL CANADIAN POPULATION 18+

% AWARE OF AUDIO BRAND

- Spotify: 77%
- Apple Music: 74%
- YouTube Music*: 64%
- Amazon Music: 57%
- iHeartRadio: 43%
- SoundCloud: 39%
- TuneIn: 9%
- Tidal: 8%
- Deezer: 11%
- LiveXLive: 3%

*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

- Spotify: 30%
- YouTube Music*: 15%
- Apple Music: 12%
- Amazon Music: 9%
- CBC Music: 8%
- SoundCloud: 7%
- Stingray: 6%
- iHeartRadio: 2%

*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

Can 2021

<table>
<thead>
<tr>
<th>Brand</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>SPOTIFY</td>
<td>41%</td>
</tr>
<tr>
<td>APPLE MUSIC</td>
<td>15%</td>
</tr>
<tr>
<td>YOUTUBE MUSIC</td>
<td>11%</td>
</tr>
<tr>
<td>STINGRAY MUSIC</td>
<td>6%</td>
</tr>
<tr>
<td>CBC MUSIC</td>
<td>9%</td>
</tr>
<tr>
<td>AMAZON MUSIC</td>
<td>7%</td>
</tr>
<tr>
<td>OTHER</td>
<td>11%</td>
</tr>
</tbody>
</table>

Own a smart speaker

<table>
<thead>
<tr>
<th>Brand</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>SPOTIFY</td>
<td>47%</td>
</tr>
<tr>
<td>APPLE MUSIC</td>
<td>11%</td>
</tr>
<tr>
<td>YOUTUBE MUSIC</td>
<td>12%</td>
</tr>
<tr>
<td>STINGRAY MUSIC</td>
<td>5%</td>
</tr>
<tr>
<td>CBC MUSIC</td>
<td>5%</td>
</tr>
<tr>
<td>AMAZON MUSIC</td>
<td>13%</td>
</tr>
<tr>
<td>OTHER</td>
<td>7%</td>
</tr>
</tbody>
</table>
What is Online Audio Listening Replacing?

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

- Over-the-air AM/FM radio: 31%
- Owned music: 30%
- New time; not taken from other sources: 35%
- Sirius XM: 4%
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>Age 18-34</th>
<th>Age 35-54</th>
<th>Age 55+</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018</td>
<td>2019</td>
<td>2020</td>
</tr>
<tr>
<td>86</td>
<td>88</td>
<td>93</td>
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<tr>
<td>82</td>
<td>92</td>
<td>93</td>
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<tr>
<td>89</td>
<td>66</td>
<td>80</td>
</tr>
<tr>
<td></td>
<td>75</td>
<td>82</td>
</tr>
</tbody>
</table>

#InfiniteDial
### Audio Sources Used in Car

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

<table>
<thead>
<tr>
<th>Audio Source</th>
<th>2019</th>
<th>2020</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>AM/FM radio</td>
<td>79</td>
<td>78</td>
<td>79</td>
</tr>
<tr>
<td>Owned music</td>
<td>56</td>
<td>46</td>
<td>39</td>
</tr>
<tr>
<td>CD player</td>
<td>54</td>
<td>44</td>
<td>32</td>
</tr>
<tr>
<td>Podcasts</td>
<td>27</td>
<td>25</td>
<td>20</td>
</tr>
<tr>
<td>SiriusXM</td>
<td>16</td>
<td>13</td>
<td>14</td>
</tr>
<tr>
<td>Online Radio</td>
<td>17</td>
<td>18</td>
<td>14</td>
</tr>
</tbody>
</table>

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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

- 2018: 10%
- 2019: 18%
- 2020: 23%
- 2021: 24%
Podcasting
Podcasting Familiarity

TOTAL CANADIAN POPULATION 18+

% FAMILIAR WITH THE TERM “PODCASTING”

2018: 61%
2019: 63%
2020: 74%
2021: 78%
Podcasting Familiarity

Populations 18+

% familiar with the term "podcasting"

U.S. 2021: 77
Australia 2021: 91
Canada 2021: 78
Podcast Listening

TOTAL CANADIAN POPULATION 18+

% EVER LISTENED TO A PODCAST

<table>
<thead>
<tr>
<th>Year</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018</td>
<td>47</td>
</tr>
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<td>2019</td>
<td>49</td>
</tr>
<tr>
<td>2020</td>
<td>50</td>
</tr>
<tr>
<td>2021</td>
<td>57</td>
</tr>
</tbody>
</table>
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 47%

Women 53%
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: 38%
- Age 35-54: 33%
- Age 55+: 29%
Monthly Podcast Listening

Populations 18+

% Listened to a podcast in last month

- U.S. 2021: 40%
- Australia 2021: 37%
- Canada 2021: 38%
Weekly Podcast Listening

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

2018: 19%
2019: 23%
2020: 24%
2021: 23%

THE INFINITE DIAL CANADA 2021
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

<table>
<thead>
<tr>
<th>Year</th>
<th>Smartphone/Mobile Device</th>
<th>Computer/Laptop</th>
</tr>
</thead>
<tbody>
<tr>
<td>Can 2019</td>
<td>76</td>
<td>24</td>
</tr>
<tr>
<td>Can 2020</td>
<td>74</td>
<td>26</td>
</tr>
<tr>
<td>Can 2021</td>
<td>65</td>
<td>35</td>
</tr>
</tbody>
</table>
Length of Time as a Podcast Listener

BASE: CANADIAN 18+ AND EVER LISTENED TO A PODCAST

- Six months to less than one year: 22%
- One year to less than three years: 30%
- Three years to less than five years: 13%
- Five years or longer: 23%
- Less than six months: 11%
Podcast Listening Locations

BASE: CANADIAN 18+ AND EVER LISTENED TO A PODCAST

% EVER LISTEN TO A PODCAST IN LOCATION

- At home: 83%
- In a car/truck: 36%
- While walking around/on foot: 35%
- At work: 24%
- At a gym/while working out: 23%
- While riding public transportation: 21%
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%
“Think about the podcast episodes you listen to. Do you typically listen to...?”

- Most of the podcast: 37%
- The entire podcast: 39%
- Less than half the podcast: 12%
- Just the beginning of podcast: 3%
- Don't Know: 9%
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?”

- 76 to 100: 56%
- 51 to 75: 12%
- 26 to 50: 20%
- 1 to 25: 12%
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.