



**Media Insights  
BC Focus  
April 2021**

## Background



- Media habits have changed dramatically in the COVID-19 pandemic, with consumers having more at-home time to consume various types of media.
- Insights West has investigated consumers use of various media during this time as well as their anticipated change in media use in the future. The intention is to re-measure media usage once pandemic restrictions have lifted to understand changes in use.

## Methodology



- Results are based on online research conducted among a sample of 826 British Columbian adults 18 years of age and older.
- Fieldwork was undertaken March 31 – April 5, 2021.
  - Margin of error  $\pm 3.4\%$ , 19 times/20.
- The data was statistically weighted according to Canadian Census figures for age, gender, and region within BC as well as according to reported voting behaviour in the last federal and provincial elections.

The media landscape is shifting, with traditional sources making way for online news and paid streaming services. The pandemic has impacted media use, spurring on existing growth of video streaming services and to a lesser extent audio services. While only the future will tell, British Columbians largely don't anticipate their media consumption and streaming subscriptions will change post-pandemic. Is this the new normal?

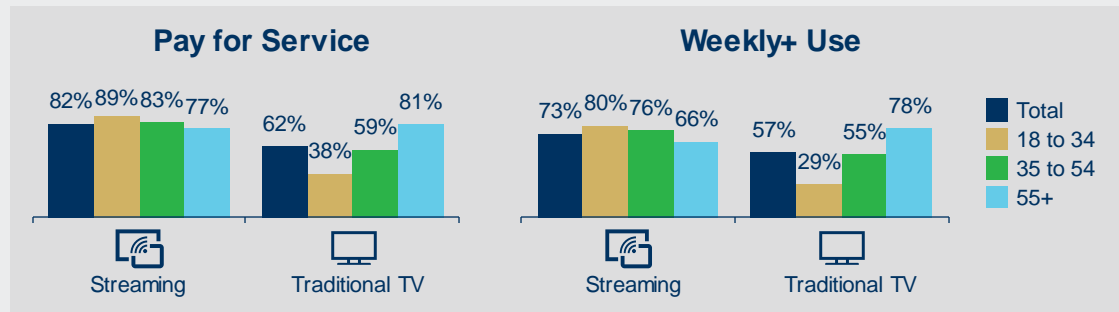
## Video

Streaming video now reaches more than traditional TV, but this varies widely by age:

- Streaming video reach for **under 55 years** is higher than traditional TV. **82%** pay for streaming video ...compared to 62% for traditional TV
- Only among **55+ years** do more turn to TV versus video streaming services.



**73%** use streaming video weekly + ...compared to 57% for traditional TV



**NETFLIX** is the strong leader in reach among all age groups and keeping subscribers (lowest lapse rates at 14%)

**69%** subscribe (next highest 51% Amazon)

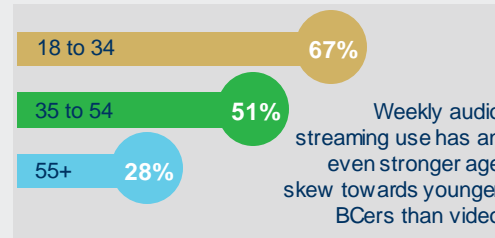
**62%** use weekly+ (next highest 36% Amazon)

**47%** adoption 2020/21

Adoption of 1 or more video streaming service is extremely high during pandemic period; this likely reflects both pandemic behaviours and growing media adoption in general.

## Audio

Streaming audio less widespread than video, but is now paid for by over half of British Columbians.



**53%** pay for streaming audio **46%** use streaming audio weekly+

**Spotify** dominates in reach and loyalty (18% lapse rate)

**37%** subscribe (next highest 14% Amazon and Apple)

**33%** use weekly+ (next highest 10% Amazon)

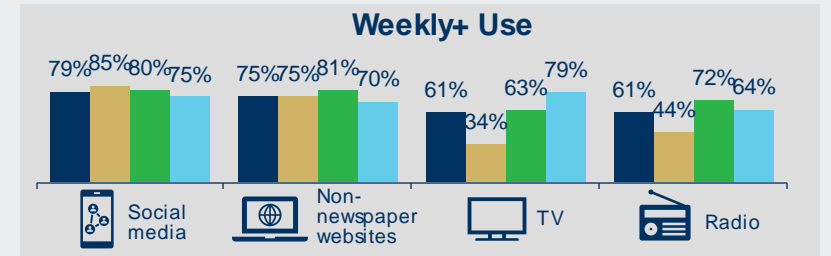
Adoption of a streaming audio service during pandemic much smaller scale than video. **18%** adoption 2020/21

## News

**79%** use SM weekly ...compared to between 34% (print newspaper) and 75% (other news websites/apps) for other media

Social media now most wide-spread media British Columbians use to access news content, but this also varies widely by age:

- Social media is #1 for those **under 55 years**; news (but not newspaper) websites/apps second.
- 55+ years** still turn most to TV, followed by social media.



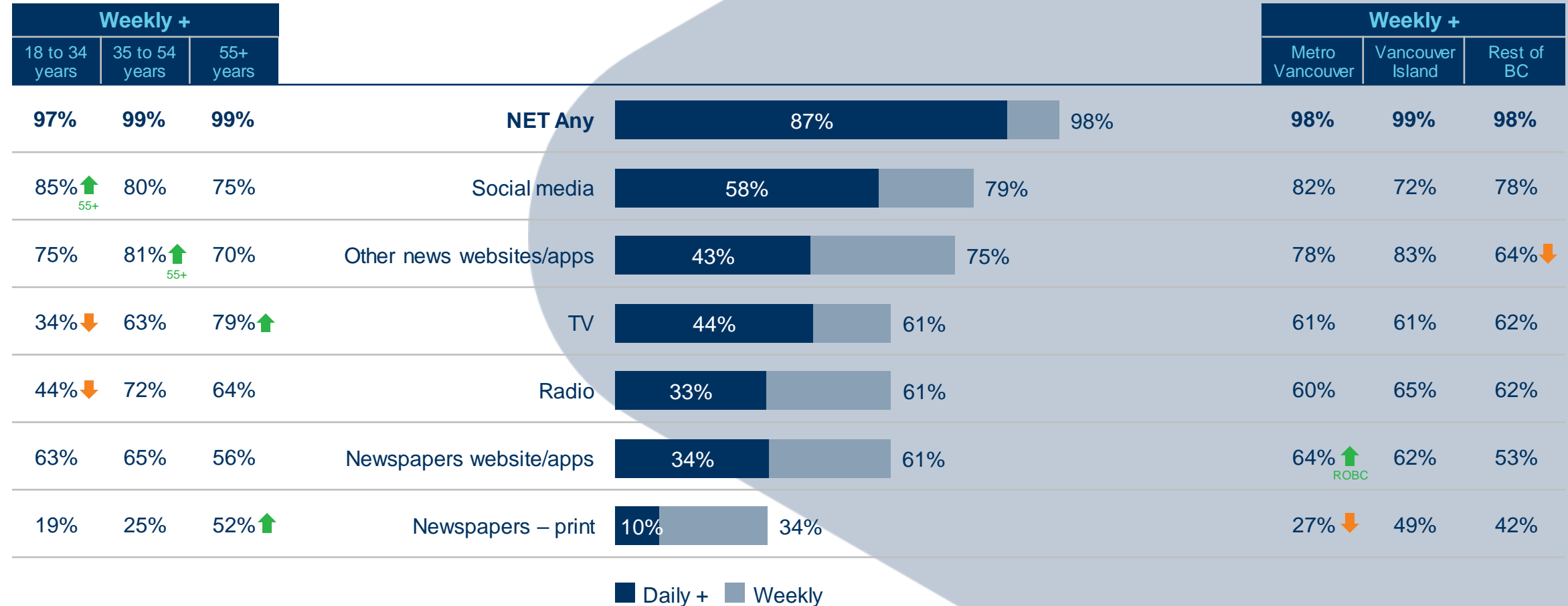
## Post Pandemic

**6%-23%** will use each media less **19%** will cancel 1+ video streaming **8%** will cancel 1+ audio streaming

Largely, British Columbians don't think their media behaviour will change – only a few will use current services less and even fewer will use any media more.

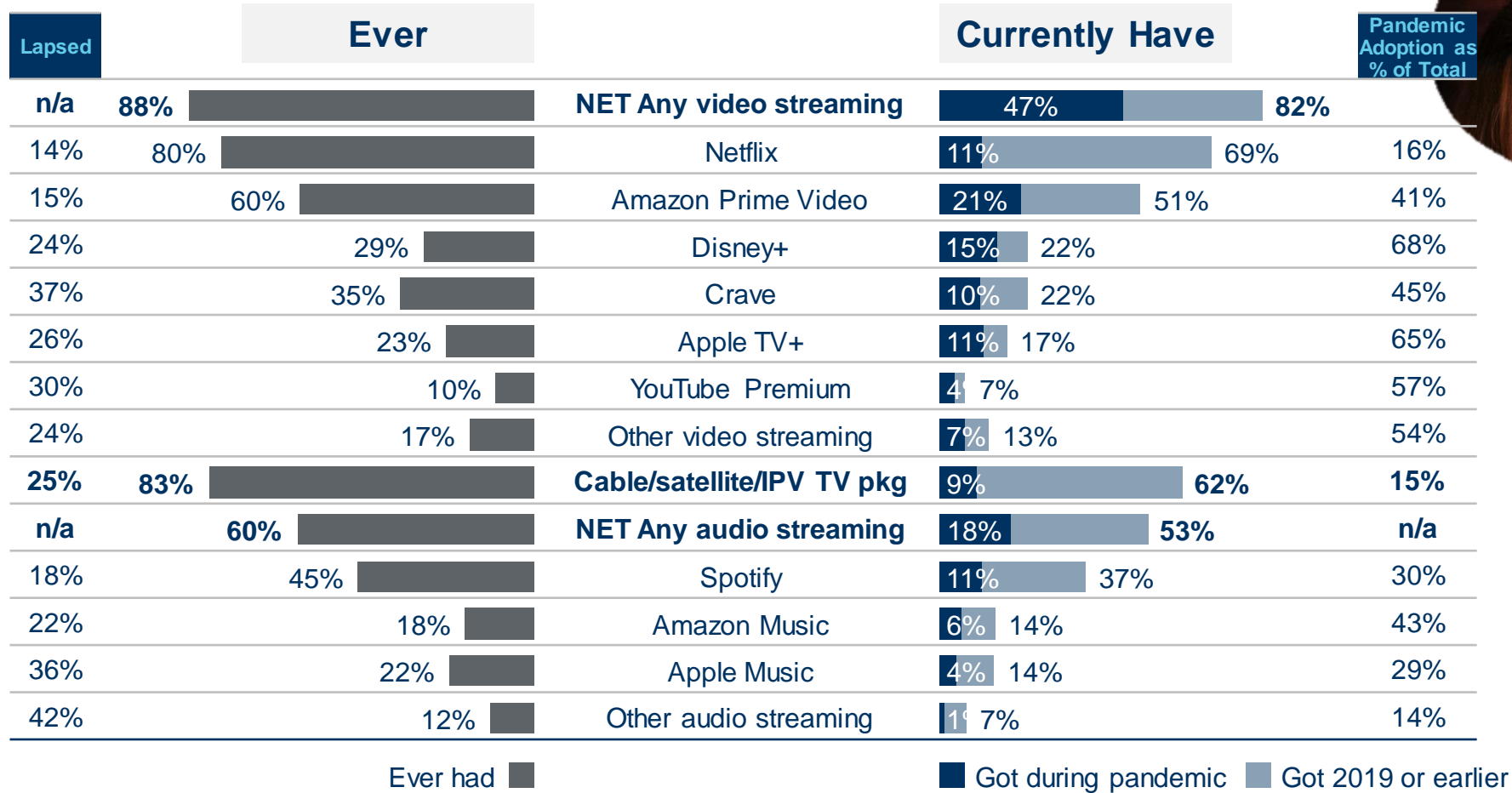
- Overall, few will cancel audio or video services they pay for; where anticipated cancel rates are high (e.g., 33% of those who subscribe to Apple TV are likely to cancel), it likely reflects general high lapse rates more than anticipated post-pandemic changes.

## Weekly Use of Media for News Content



How often do you generally get news from each of the following sources?

## Video and Audio Media Subscriptions



Which of the following **TV, video and audio streaming services** does your household currently pay for and when did you sign up for each?

## Video and Audio Media Subscriptions x Age

Got During Pandemic				Total Have		
18 to 34 years	35 to 54 years	55+ years		18 to 34 years	35 to 54 years	55+ years
54%	56%	34% ↓	<b>NET Any video streaming</b>	89% ↑ <sup>55+</sup>	83%	77%
12%	9%	11%	Netflix	77%	71%	62% ↓
20%	22%	21%	Amazon Prime Video	52%	58% ↑ <sup>55+</sup>	44%
17%	22%	6% ↓	Disney+	27%	31%	12% ↓
9%	10%	11%	Crave	19%	26%	22%
11%	16% ↑ <sup>55+</sup>	6%	Apple TV+	18%	23% ↑ <sup>55+</sup>	12%
4%	4%	4%	YouTube Premium	5%	6%	8%
8%	7%	5%	Other video streaming	13%	13%	12%
7%	11%	10%	<b>Cable/satellite/IPV TV pkg</b>	38% ↓	59%	81% ↑
20%	20%	16%	<b>NET Any audio stream streaming</b>	73% ↑	58%	35% ↓
15% ↑ <sup>55+</sup>	11%	8%	Spotify	61% ↑	39%	19% ↓
3%	8% ↑ <sup>18-34</sup>	5%	Amazon Music	8%	20% ↑	13%
4%	4%	4%	Apple Music	11%	19% ↑	12%
1%	1%	2%	Other audio streaming	6%	7%	7%

Which of the following **TV, video and audio streaming services** does your household currently pay for and when did you sign up for each?










## Video and Audio Media Subscriptions x Region

Got During Pandemic				Total Have		
Metro Vancouver	Vancouver Island	Rest of BC		Metro Vancouver	Vancouver Island	Rest of BC
49%	48%	40%	<b>NET Any video streaming</b>	82%	82%	85%
10%	13%	11%	Netflix	67%	70%	75%
20%	23%	21%	Amazon Prime Video	52%	51%	50%
15%	21%	9% ↓	Disney+	26% ↑ <sup>ROBC</sup>	23%	14%
9%	12%	11%	Crave	22%	25%	21%
14%	11%	4% ↓	Apple TV+	20% ↑ <sup>ROBC</sup>	18%	10%
4%	2%	6% ↑ <sup>VI</sup>	YouTube Premium	5%	3%	13% ↑
6%	5%	8%	Other video streaming	13%	12%	12%
<b>10%</b>	<b>5%</b>	<b>12% ↑<sup>VI</sup></b>	<b>Cable/satellite/IPV TV pkg</b>	<b>59%</b>	<b>58%</b>	<b>71% ↑</b>
<b>18%</b>	<b>17%</b>	<b>19%</b>	<b>NET Any audio stream streaming</b>	<b>58% ↑</b>	<b>43%</b>	<b>48%</b>
11%	8%	12%	Spotify	42% ↑	29%	31%
6%	6%	5%	Amazon Music	15%	15%	12%
4%	4%	6%	Apple Music	15%	10%	16%
2%	0%	2%	Other audio streaming	7%	3% ↓	10%

Which of the following **TV, video and audio streaming services** does your household currently pay for and when did you sign up for each?

## Weekly Use of Video and Audio Media

Monthly+				Weekly+		
		Daily +	Weekly	Metro Vancouver	Vancouver Island	Rest of BC
78%	NET Any video streaming	38%	73%	70%	77%	77%
66%	Netflix	28%	62%	59%	64%	68%
43%	Amazon Prime Video	10%	36%	35%	43%	35%
20%	Disney+	3%	17%	19%  ROBC	18%	12%
20%	Crave	4%	17%	16%	18%	16%
11%	Apple TV+	2%	6%	7%	8%	4%
6%	YouTube Premium	3%	6%	5%	3%	9%  VI
11%	Other video streaming	4%	10%	10%	11%	10%
73%	Live radio	40%	68%	67%	72%	69%
59%	Cable, satellite, or IPV TV package	49%	57%	53%	54%	69% 
49%	NET Any audio streaming	28%	46%	51% 	37%	41%
36%	Spotify	20%	33%	38% 	24%	26%
11%	Apple Music	4%	10%	11%	8%	9%
8%	Amazon Music	2%	6%	6%	9%	5%
6%	Other audio streaming	3%	6%	5%	2% 	9%
42%	Podcasts	10%	31%	34%  ROBC	33%	24%

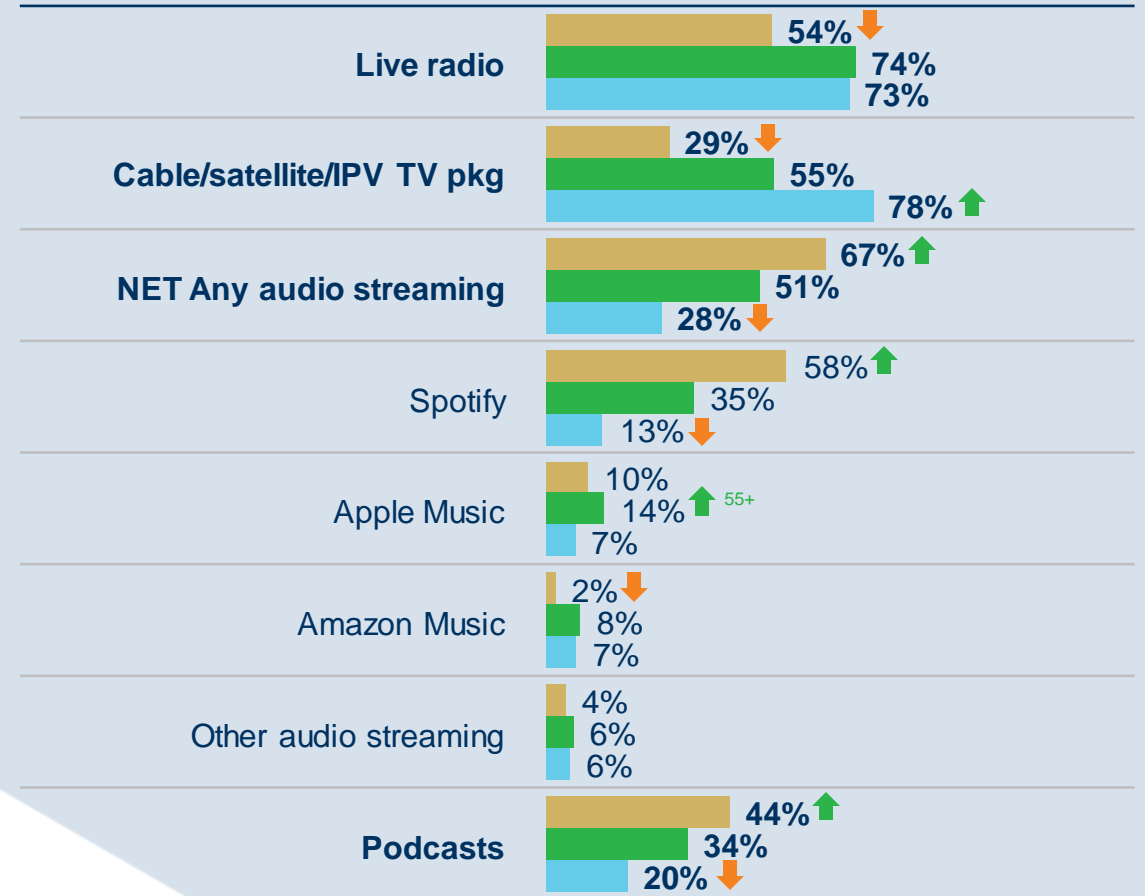
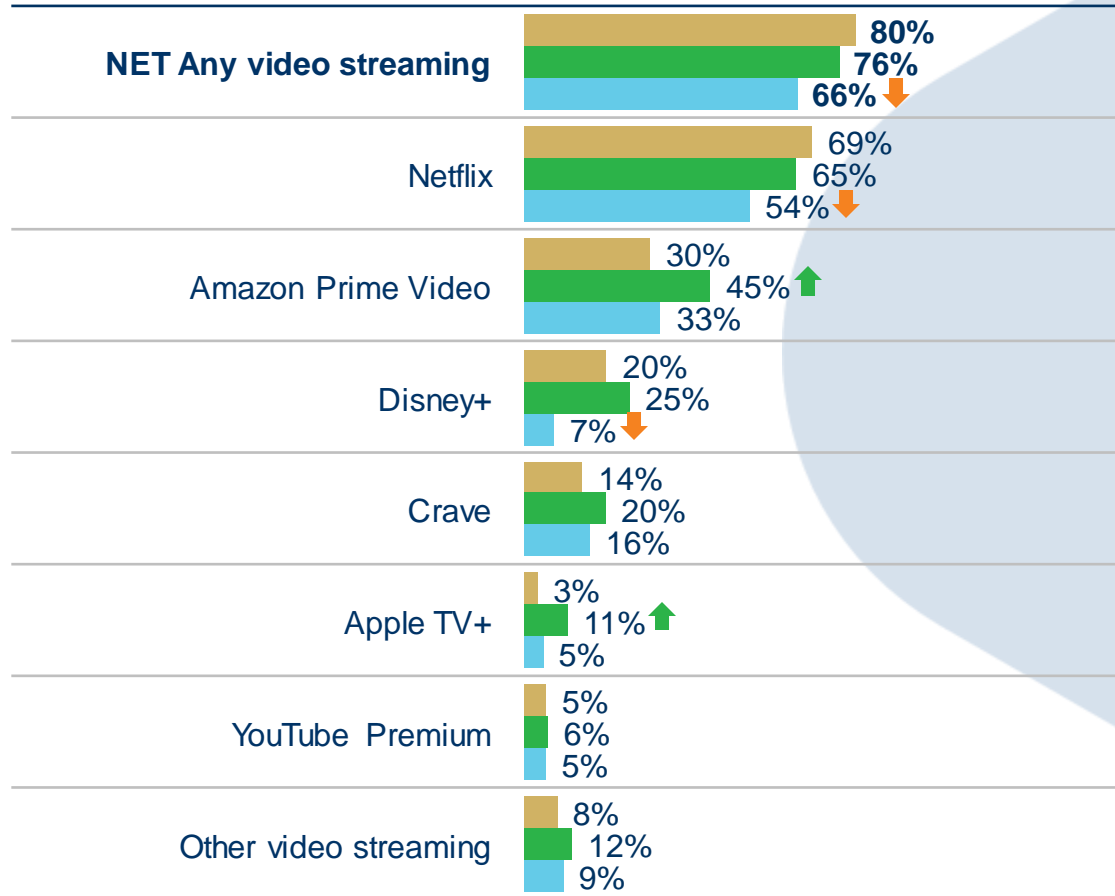
■ Daily + ■ Weekly

Currently, how often do you generally use each of the following?



## Weekly Use of Video and Audio Media x Age

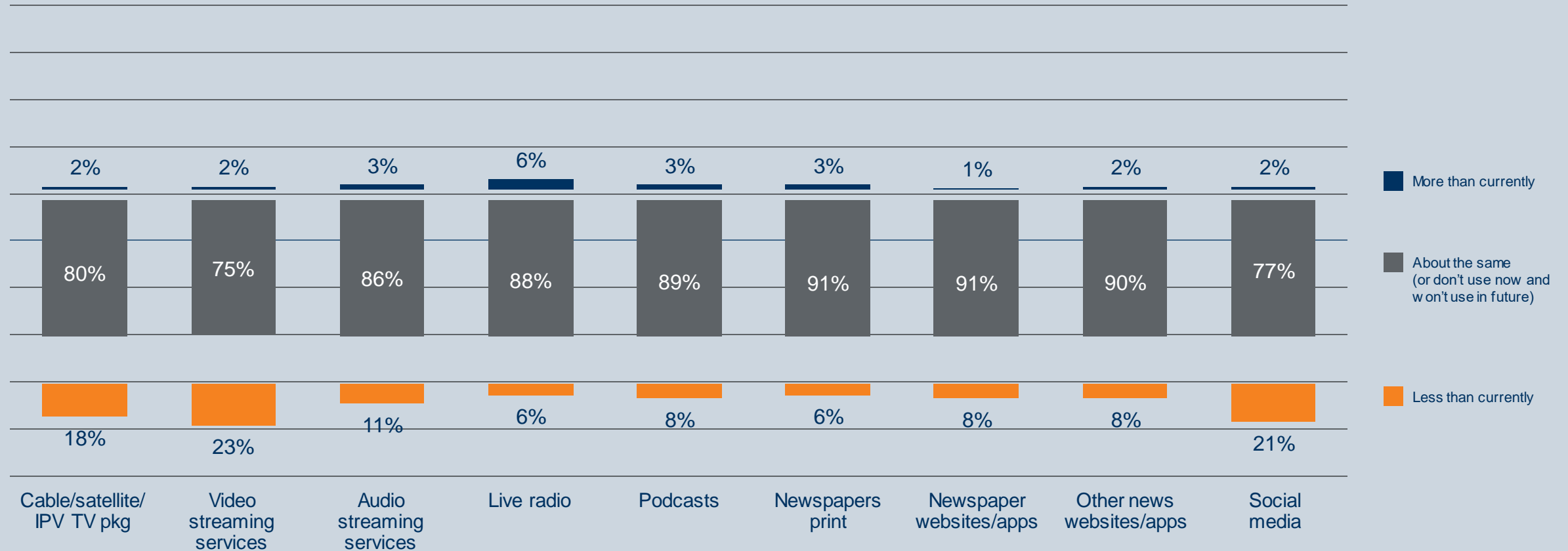
■ 18 to 34 years  
■ 35 to 54 years  
■ 55+ years



Currently, how often do you generally use each of the following?

↑ Statistically significantly **higher** than comparison group(s).  
↓ Statistically significantly **lower** than comparison group(s).

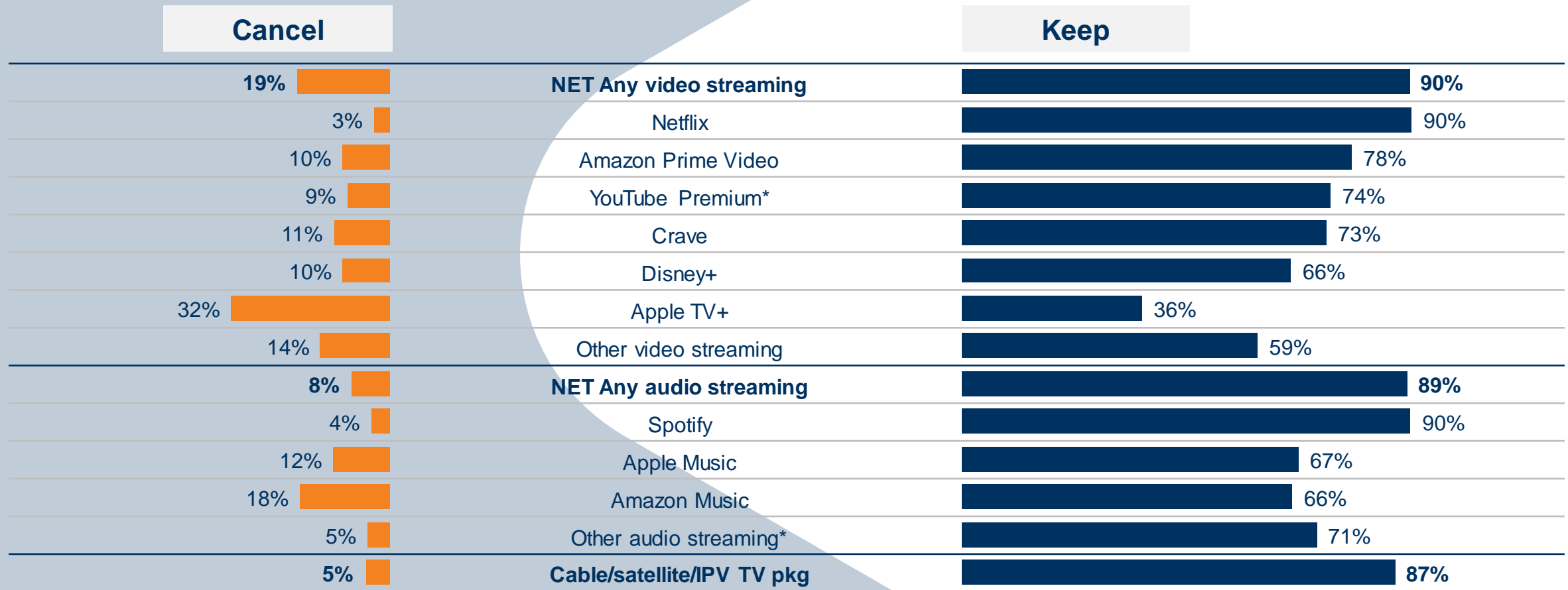
## Expected Change in Media Use Post-Pandemic



When the pandemic is over and restrictions on socialization due to COVID-19 are lifted, do you think you will use each of the following more, less or the same compared to how much you use each currently?

## Expected Services Kept/Cancel Post-Pandemic

(Among Subscribers to Each)



\*Small base size (n<100), interpret with caution.

When the pandemic is over and restrictions on socialization due to COVID-19 are lifted, which of the following (which you indicated earlier that you currently have) do you think will keep and which are you likely to cancel?

**For more information, please contact:**

Steve Mossop  
President

 [stevemossop@insightswest.com](mailto:stevemossop@insightswest.com)