



**Media Insights  
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 1,603 English speaking Canadian adults 18 years of age and older.
- Fieldwork was undertaken March 31 – April 5, 2021.
  - Margin of error  $\pm 2.4\%$ , 19 times/20.
- The data was statistically weighted according to Canadian Census figures for age, gender and region as well as according to reported voting behaviour in the last federal election.

The Canadian 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, Canadians largely don't anticipate their media consumption and streaming subscriptions will change post-pandemic. Is this the new normal?

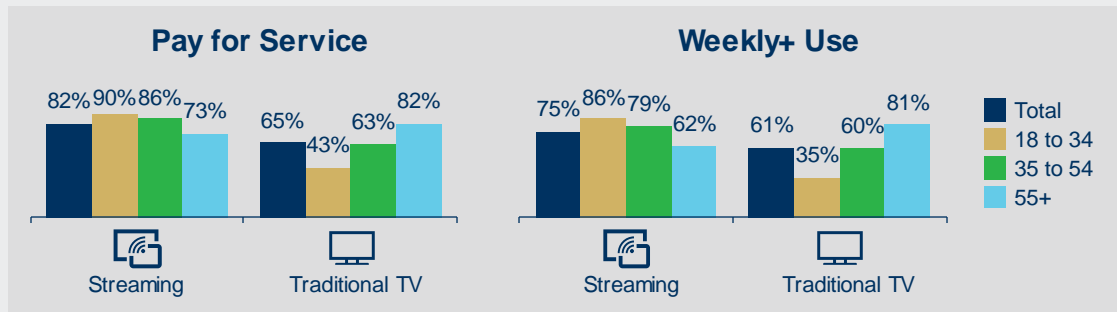
## Video

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

- Streaming video reach for **under 55 years** is more than traditional TV. **82%** pay for streaming video ...compared to 65% for traditional TV
- Only among **55+ years** do more turn to TV versus video streaming services. **63%** use streaming video w/ weekly+ ...compared to 61% for traditional TV



**75%** use streaming video w/ weekly+ ...compared to 61% for traditional TV



**NETFLIX** is the strong leader in reach among all age groups and keeping subscribers (lowest lapse rates at 11%)

**70%** subscribe (next highest 53% Amazon)

**64%** use w/ weekly+ (next highest 39% Amazon)

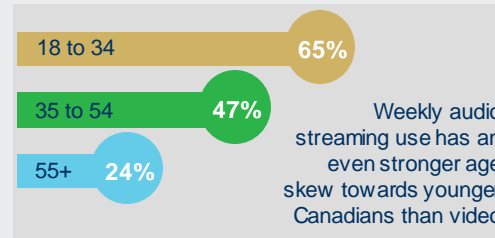
**49%** adoption 2020/21

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 Canadians.

**52%** pay for streaming audio **43%** use streaming audio w/ weekly+



**Spotify** dominates in reach and loyalty (19% lapse rate)

**35%** subscribe (next highest 18% Amazon)

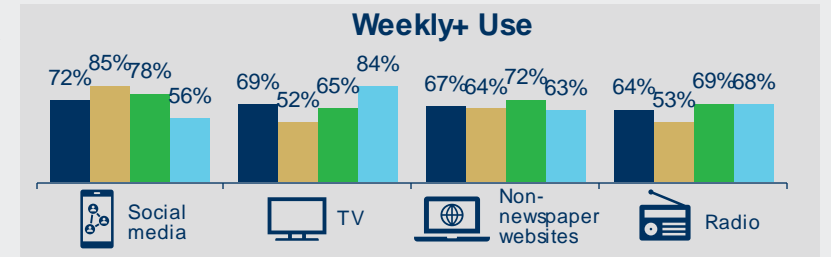
**31%** use w/ weekly+ (next highest 9% Apple and Amazon)

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

## News

**72%** use SM w/ weekly+ ...compared to between 34% (print newspaper) and 69% (TV) for other media

Social media now most wide-spread media Canadians 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 radio.

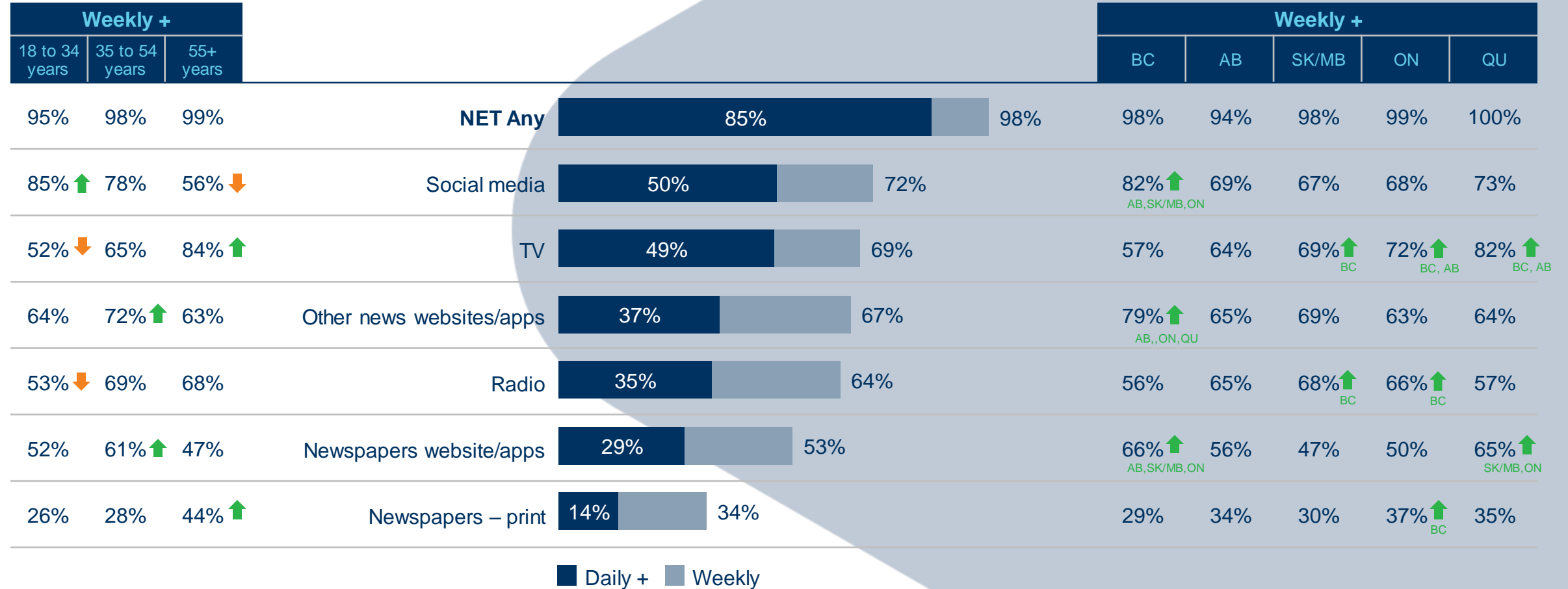
## Post Pandemic

**8%-15%** will use each media less **17%** will cancel 1+ video streaming **8%** will cancel 1+ audio streaming

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

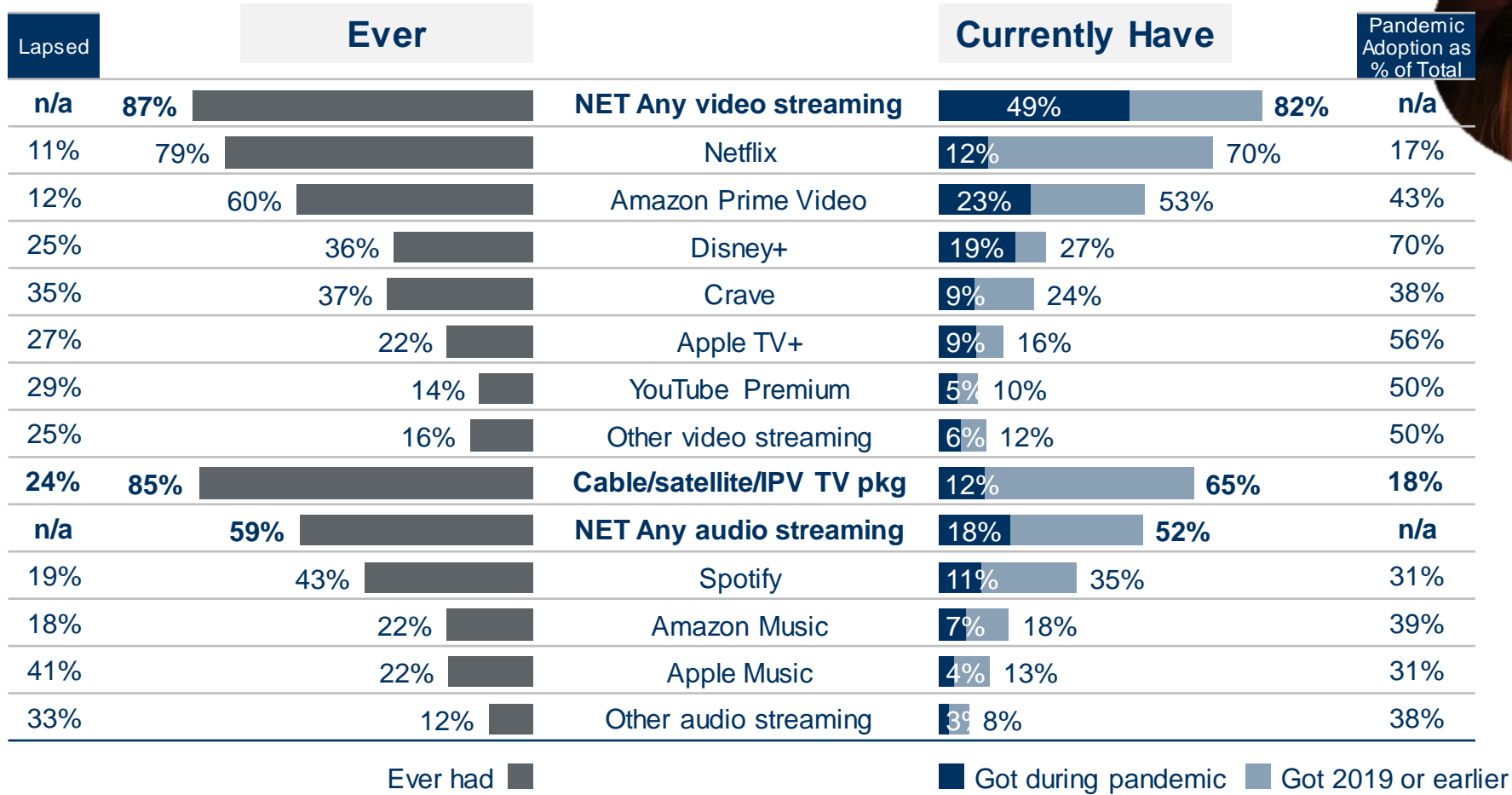
- Overall, few will cancel audio or video services they pay for; where anticipated cancel rates are high (e.g., 33% of those who subscribe to Apple TV are likely to cancel), it likely reflects general high lapse rates more than anticipated post-pandemic changes.

## 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
57%	55%	36% ↓	<b>NET Any video streaming</b>	90%	86%	73% ↓
15%	14%	9%	Netflix	79%	75%	58% ↓
26%	26%	19% ↓	Amazon Prime Video	62%	59%	40% ↓
28%	26%	8% ↓	Disney+	38%	36%	11% ↓
10%	8%	9%	Crave	24%	25%	23%
9%	13% ↑ 55+	6% ↓	Apple TV+	16%	22% ↑ 55+	12%
6%	6%	3% ↓	YouTube Premium	11%	15%	6% ↓
6%	6%	5%	Other video streaming	12%	14%	11%
11%	13%	11%	<b>Cable/satellite/IPV TV pkg</b>	43% ↓	63%	82% ↑
22%	22%	12% ↓	<b>NET Any audio stream streaming</b>	71% ↑	60%	31% ↓
13%	14%	7% ↓	Spotify	52% ↑	41%	16% ↓
7%	10% ↑ 55+	4%	Amazon Music	20%	23%	12% ↓
6% ↑ 55+	4%	2%	Apple Music	19%	16%	6% ↓
3%	4% ↑ 55+	1%	Other audio streaming	8%	11% ↑ 55+	5%



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

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










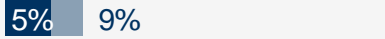
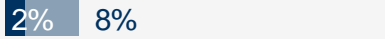

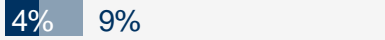













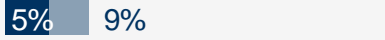

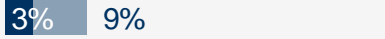

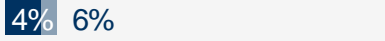



## Video and Audio Media Subscriptions x Region

Got During Pandemic					Total Have					
BC	AB	SK/MB	ON	QU		BC	AB	SK/MB	ON	QU
51%	59%  SK/MB, ON	45%	44%	47%	<b>NET Any video streaming</b>	87%  ON	89%  ON	80%	78%	83%
12%	12%	8%	12%	25% 	Netflix	73%  ON	76%  ON	70%	65%	77%  ON
22%	34%  BC, SK/MB, ON	22%	19%	27%	Amazon Prime Video	53%	60%  SK/MB, ON	47%	50%	54%
18%	22%	16%	19%	20%	Disney+	25%	35%  BC, SK/MB, ON	24%	25%	29%
9%	14%  QU	9%	8%	7%	Crave	24%	30%  QU	20%	24%	18%
14%  ON	16%  ON	8%	6%	14%	Apple TV+	20%  ON	23%  ON	14%	13%	22%  ON
5%	6%	4%	4%	9%	YouTube Premium	8%	11%	11%	10%	15%  BC
8%  SK/MB	5%	3%	5%	9%  SK/MB	Other video streaming	16%  SK/MB	12%	7%	11%	17%  SK/MB
11%	16%	10%	12%	11%	<b>Cable/satellite/IPV TV pkg</b>	55%	71%  BC	72%  BC	66%  BC	63%
20%	22%	15%	17%	23%	<b>NET Any audio stream streaming</b>	58%  ON	53%	47%	50%	59%  ON
12%	12%	7%	10%	18%  SK/MB	Spotify	45%  AB, SK/MB, ON	33%	32%	31%	45%  ON
7%	9%	7%	5%	11%  ON	Amazon Music	14%	19%	19%	19%	23%  BC
4%	8%  SK/MB, ON	2%	2%	9%  BC, SK/MB, ON	Apple Music	15%	15%	13%	11%	25% 
2%	3%	0%	3%	8%  BC, ON	Other audio streaming	8%	7%	4%	9%  SK/MB	11%  SK/MB

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

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

## Weekly Use of Video and Audio Media

			Weekly+				
Monthly+			BC	AB	SK/MB	ON	QU
79%	<b>NET Any video streaming</b>	42%  75%	78% 	82% 	68%	71%	77%
68%	Netflix	33%  64%	66%	69%	62%	60%	72% 
47%	Amazon Prime Video	12%  39%	38%	40%	33%	40%	38%
26%	Disney+	7%  23%	19%	30% 	21%	20%	25%
22%	Crave	4%  18%	19%	20%	16%	19%	14%
9%	YouTube Premium	5%  9%	7%	9%	9%	8%	13%
12%	Apple TV+	2%  8%	8%	12%	6%	7%	16% 
10%	Other video streaming	4%  9%	12%	9%	6%	8%	13%
73%	<b>Live radio</b>	37%  69%	63%	74% 	71% 	71% 	55%
62%	<b>Cable/satellite/IPV TV pkg</b>	51%  61%	50%	68% 	68% 	62% 	61%
46%	<b>NET Any audio streaming</b>	26%  43%	52% 	42%	36%	41%	50%
33%	Spotify	18%  31%	41% 	29%	25%	28%	39% 
11%	Apple Music	5%  9%	10%	10%	10%	7%	16% 
11%	Amazon Music	3%  9%	6%	8%	11%	10%	14% 
6%	Other audio streaming	4%  6%	6%	6%	4%	6%	9%
39%	<b>Podcasts</b>	10%  30%	41% 	33%	18% 	29%	32%

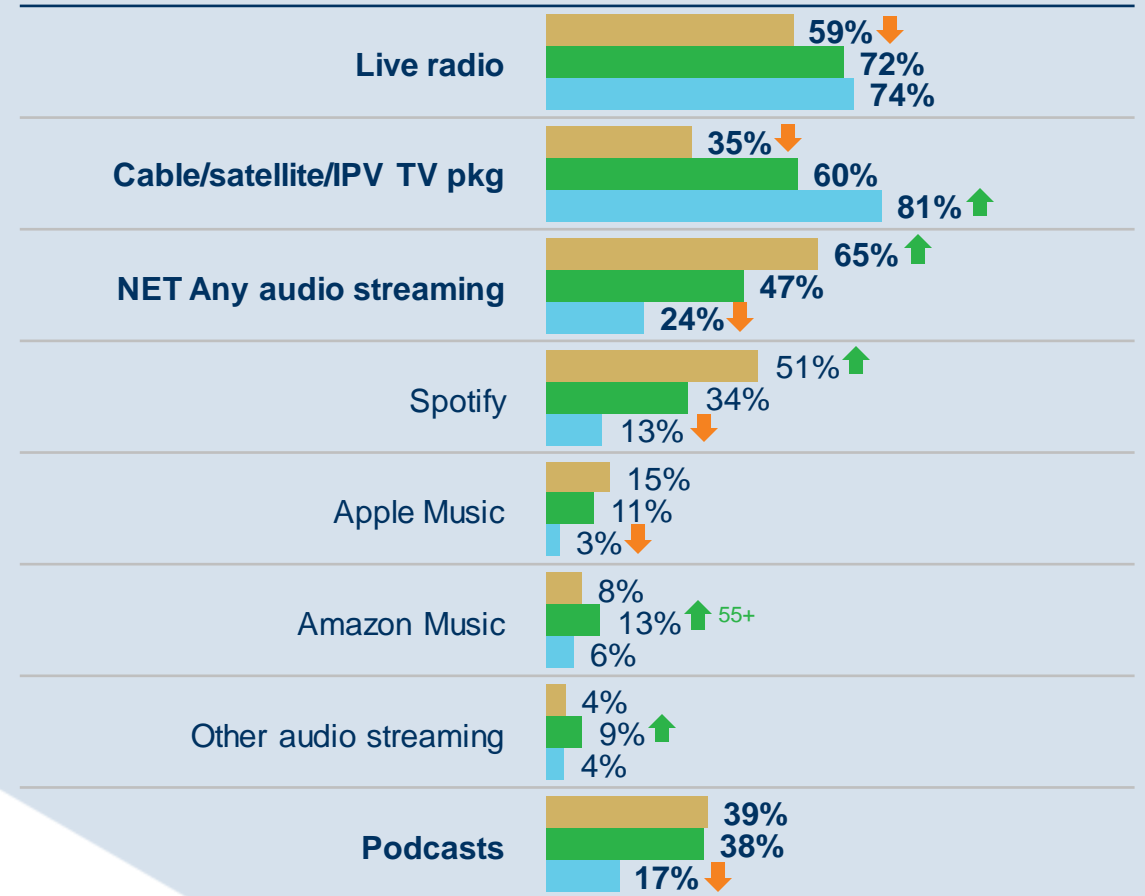
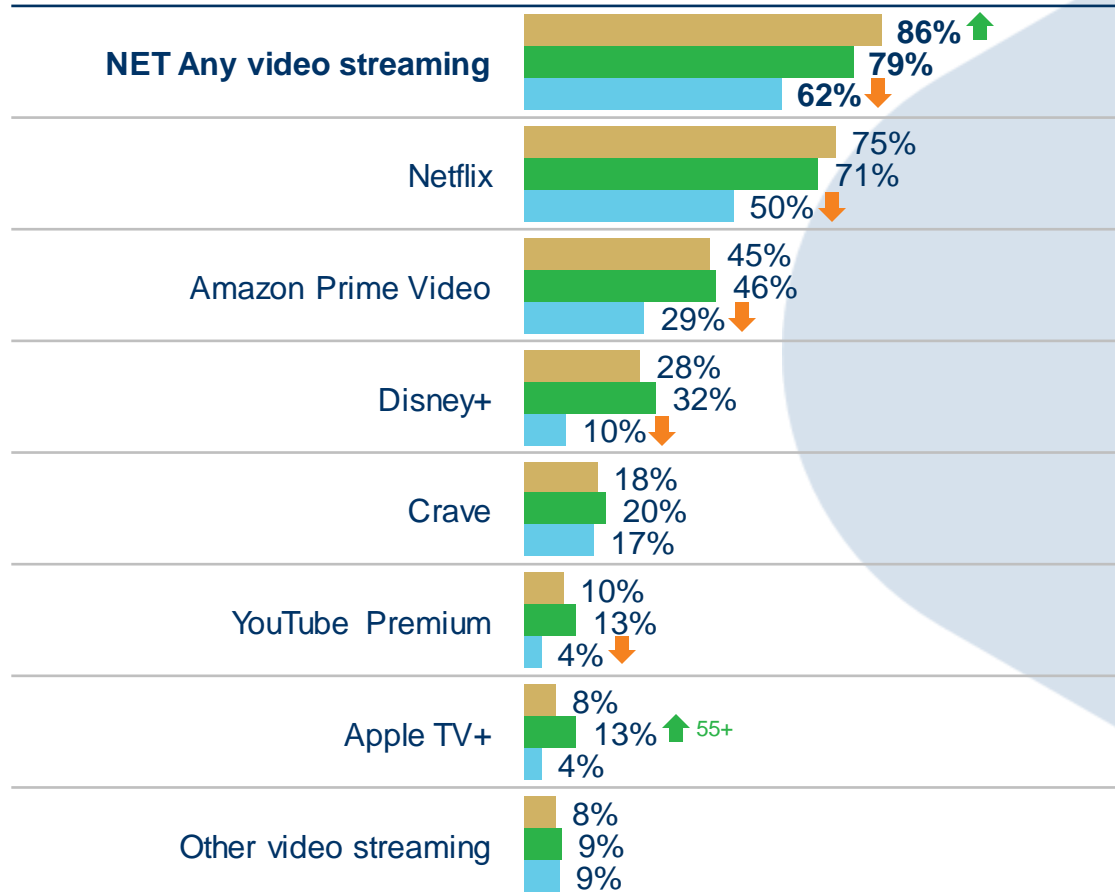
 Daily +  Weekly

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



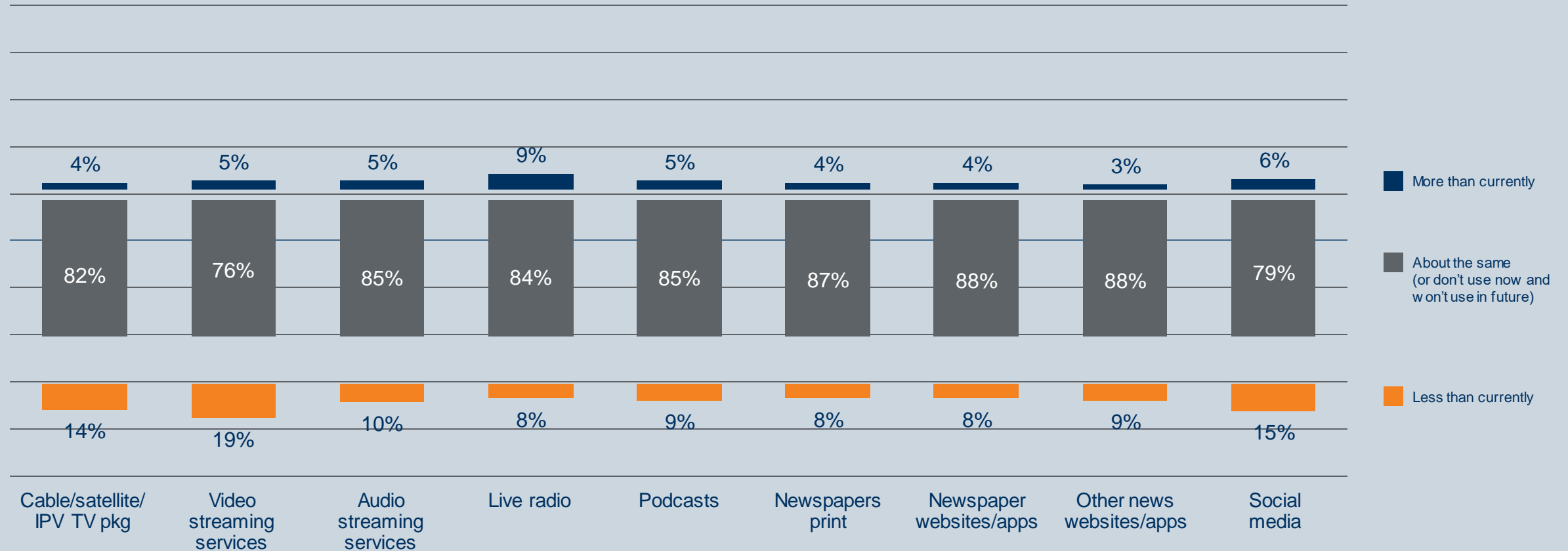
## Weekly Use of Video and Audio Media x Age

18 to 34 years  
35 to 54 years  
55+ years



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

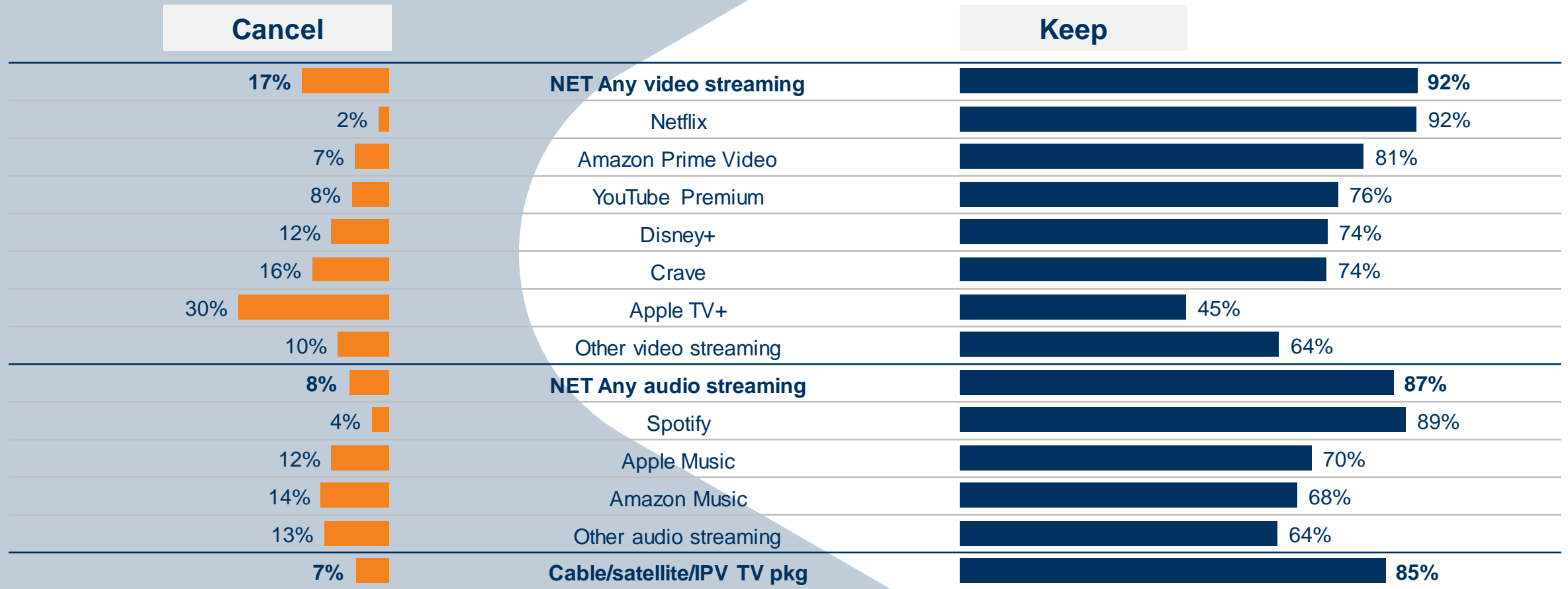
## Expected Change in Media Use Post-Pandemic



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)



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:**

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