

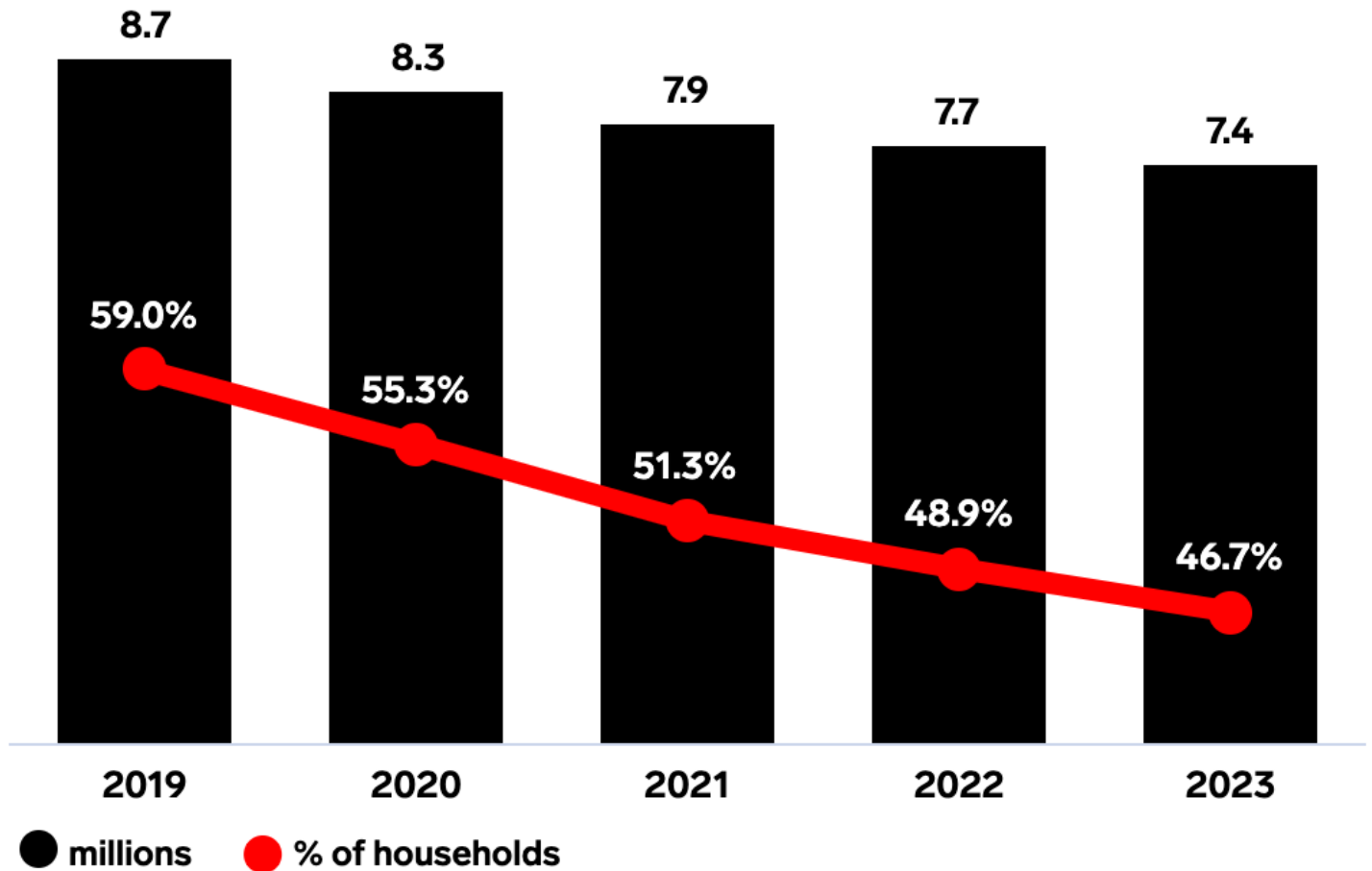
In Canada, less than 50% of households will subscribe to pay TV in 2022

Article

The forecast: In 2022, **48.9%** of households in Canada will have pay TV, marking a massive and continuing trend of cable cord-cutting in the country.

Pay TV Households

Canada, 2019-2023



Source: eMarketer, August 2021

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A deeper dive:

- As recent as 2015, more than 75% of households in Canada—a total of 10.5 million—had pay TV. That figure has been steadily declining for years and will dip to 7.9 million, or 51.3% of households, by the end of 2021.
- "Cord-cutting is an underlying reason for digital video's displacement of TV," said Paul Briggs, eMarketer principal analyst, in our "Canada Time Spent with Media 2021" report. "The

annual decline in cable TV subscribers has been in the low single-digit percentage range for many years, but the number jumped in 2020."

- While many households in Canada are cord-nevers—that is, households that have never subscribed to pay TV—an increasing share are cord-cutters, those who have chosen to leave traditional pay TV behind. This year, **34.4%** of non-pay TV households were cord-nevers, while **65.6%** were cord-cutters. This marks a shift from 2014, when these two shares were split almost evenly.
- Many internet users have pivoted to streaming services like **Netflix** and **Amazon Prime Video**, but streaming subscription rates vary across English and French speakers in Canada.

Digital Video Services Used* by Internet Users in Canada, by Language, Q3 2020

% of respondents

| | English | French |
|--------------------|---------|--------|
| Netflix | 68.3% | 52.7% |
| Amazon Prime Video | 34.2% | 17.9% |
| Disney+ | 23.6% | 13.4% |
| Crave | 16.8% | 7.1% |
| YouTube Premium | 11.8% | 13.4% |
| Apple TV+ | 10.3% | 6.0% |
| CBC Gem | 8.8% | 1.7% |
| iTunes | 8.6% | 9.5% |
| DAZN | 4.5% | 2.8% |
| Vimeo | 4.0% | 3.8% |
| NBA League Pass | 2.7% | 2.7% |
| BritBox | 2.1% | 0.7% |
| Crackle | 1.9% | 0.4% |
| NFL Game Pass | 1.2% | 1.1% |
| Club illico | 1.0% | 15.3% |
| ICI Tou.tv Extra | 0.7% | 17.3% |
| YouTube Kids | 0.1% | 3.5% |

Note: ages 16-64; *to watch or download TV shows, films, or videos
 Source: GlobalWebIndex as cited by Canada Media Fund (CMF), "Pause and Rethink: Annual Trends Report in the Audiovisual Industry," Feb 2021

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Looking ahead: Pay TV households will continue to decline in Canada. By 2025, we predict that just **7.0 million** households will maintain pay TV subscriptions, a total share of **43.1%** of all households.