

ONLINE CONSUMPTION OF COPYRIGHTED CONTENT



Canada 

Online Consumption of Copyrighted Content

Infographic

Prepared for Innovation, Science and Economic Development Canada by Kantar TNS
May 2018

Innovation, Science and Economic Development in partnership with Canadian Heritage commissioned Kantar TNS to conduct a public opinion research survey of Canadians' consumption of copyrighted content online. The purpose of the survey was to generate impartial data to better understand the prevalence of copyright infringement in Canada and what attitudes and conditions drive consumer behaviour. 3,301 Canadians aged 12 years and over were surveyed online and by telephone in November 2017. This publication summarizes the main findings of that public opinion research survey.

This publication is available online at www.ic.gc.ca/eic/site/icgc.nsf/eng/h_00295.html.

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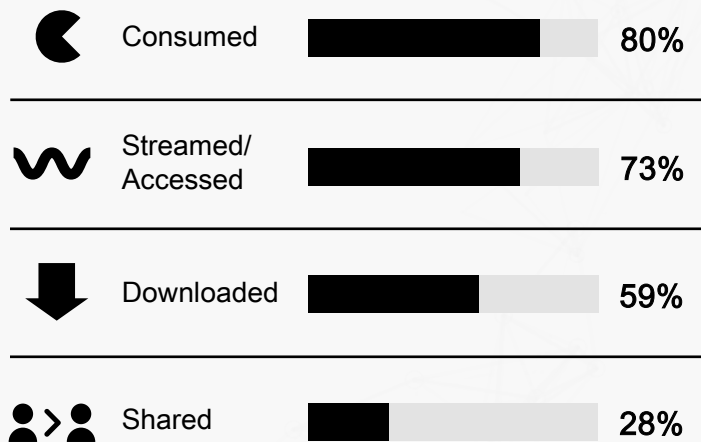
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Cette publication est aussi disponible en français sous le titre : Consommation en ligne de contenu protégé par le droit d'auteur

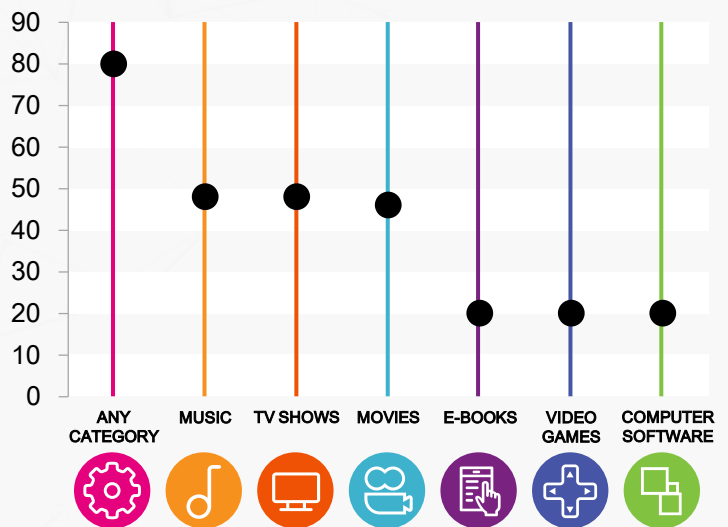
OVERVIEW

The Government of Canada commissioned Kantar TNS to conduct a public opinion research survey of Canadians' consumption of copyrighted content online. The purpose of the survey was to generate impartial data to better understand the prevalence of copyright infringement in Canada and what attitudes and conditions drive consumption behaviours. The survey looked at online consumption across six types of copyrighted content. 3,301 Canadians aged 12 years and up were surveyed online and by telephone in November 2017. Respondents were asked about their online activity in the previous three months. This document summarises the main results of the survey. The full report, *Study of Online Consumption of Copyrighted Content: Attitudes Toward and Prevalence of Copyright Infringement in Canada*, is available on the website of Library and Archives Canada (www.bac-lac.gc.ca).

ONLINE ACTIVITY

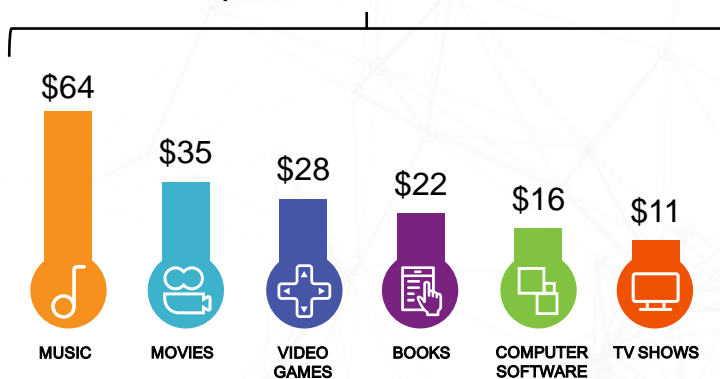


% CONTENT CONSUMPTION



AVERAGE QUARTERLY SPENDING

TOTAL \$176 PER CONSUMER



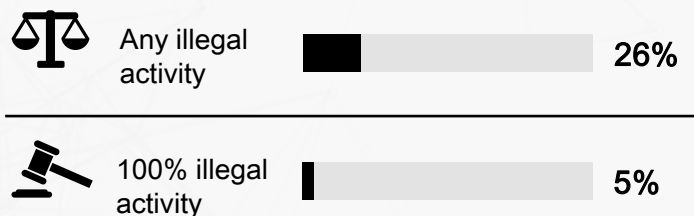
▲ These figures include spending on physical copies, tickets and merchandise.

Consumer spending surveyed in this research does not include subscriptions to TV services.



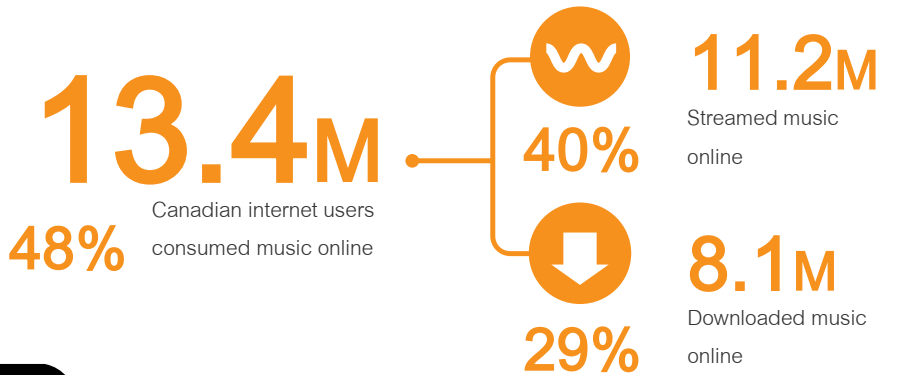
INFRINGEMENT

OVERALL LEVEL OF COPYRIGHT INFRINGEMENT



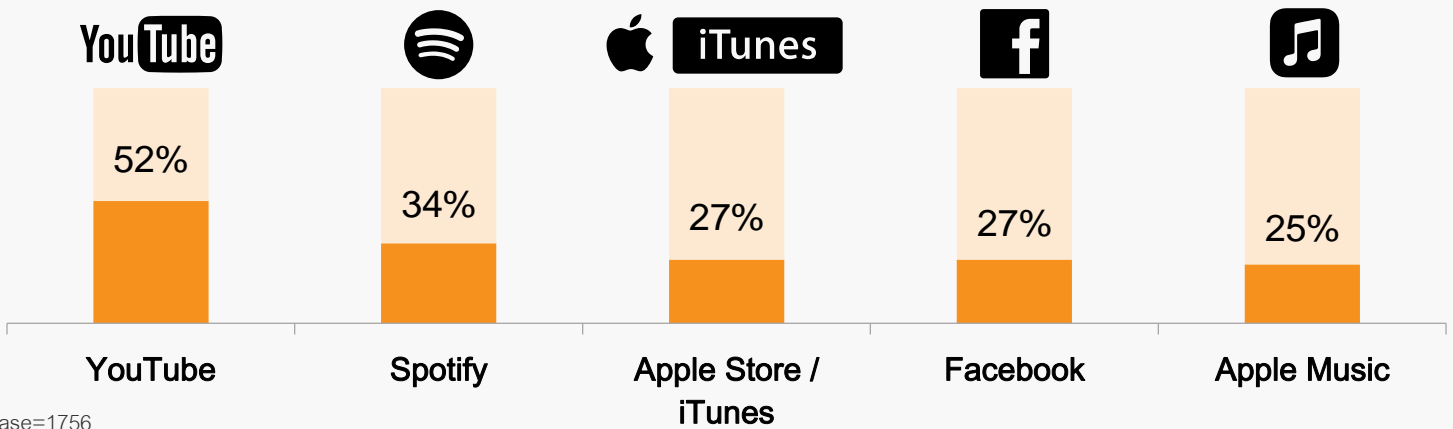
MUSIC

IN THE PAST 3 MONTHS



TOP 5 SOURCES USED

The top 5 sources people used to stream/download/share music



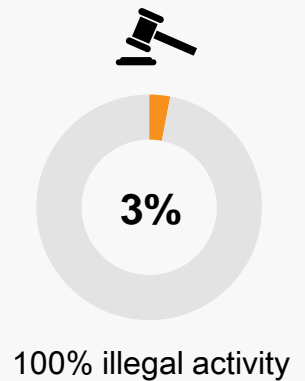
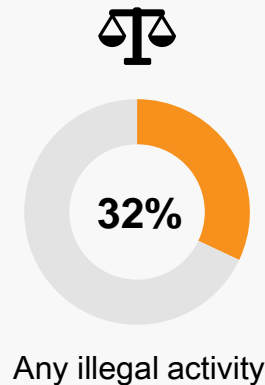
QUARTERLY CONSUMER SPENDING

\$1.9BN

TICKETS	58%	\$1.1BN
PHYSICAL	17%	\$323M
MERCHANDISE	15%	\$294M
DIGITAL	6%	\$120M
SUBSCRIPTIONS	4%	\$75M



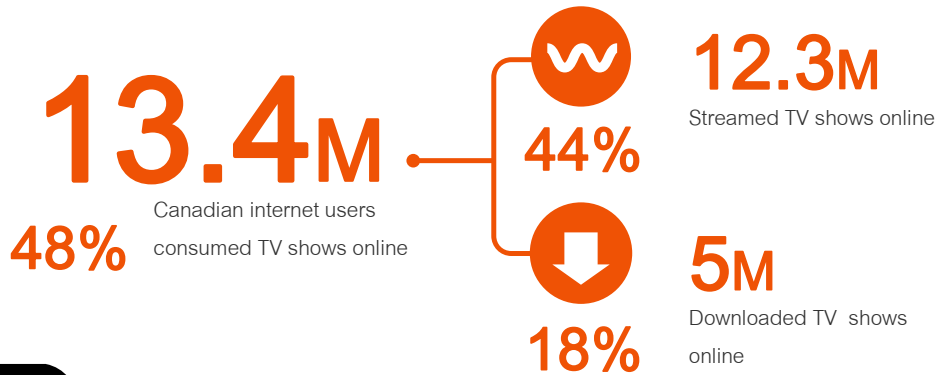
INFRINGEMENT



Base=1721

TV SHOWS

IN THE PAST 3 MONTHS



TOP 5 SOURCES USED

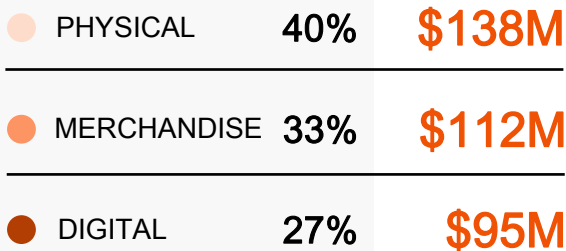
The top 5 sources people used to stream/download/share TV shows



Base=1736

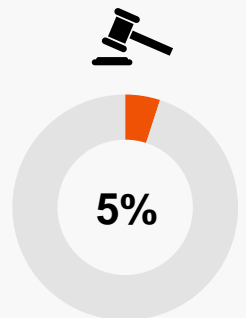
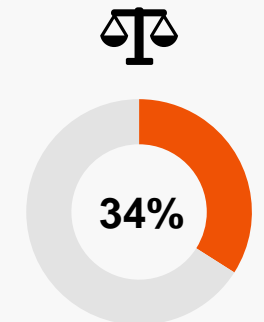
QUARTERLY CONSUMER SPENDING

\$345M



Consumer spending surveyed in this research does not include subscriptions to TV services.

INFRINGEMENT



Base=1719

MOVIES

IN THE PAST 3 MONTHS



12.9M
Canadian internet users
consumed movies online

46%

41%

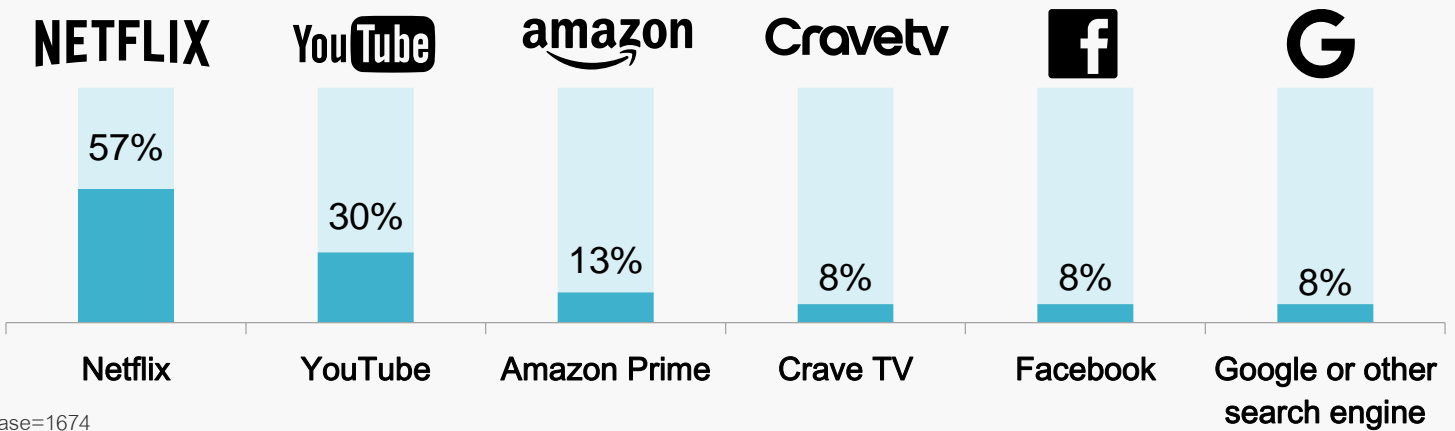
11.5M
Streamed movies online

22%

6.1M
Downloaded movies
online

TOP 5 SOURCES USED

The top 5 sources people used to stream/download/share movies

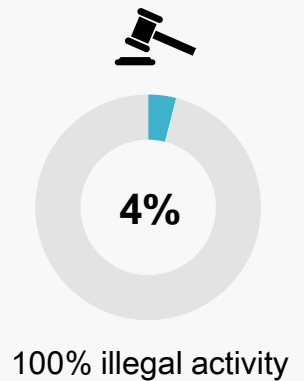
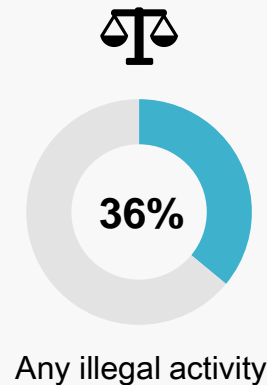


QUARTERLY CONSUMER SPENDING

\$1.1BN

TICKETS	48%	\$514M
PHYSICAL	20%	\$213M
SUBSCRIPTION	17%	\$184M
DIGITAL	10%	\$103M
MERCHANDISE	5%	\$58M

INFRINGEMENT



Base=1658

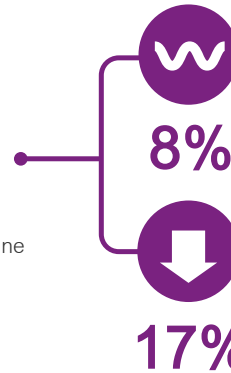
E-BOOKS

IN THE PAST 3 MONTHS



5.6M

20% Canadian internet users consumed e-books online



2.2M

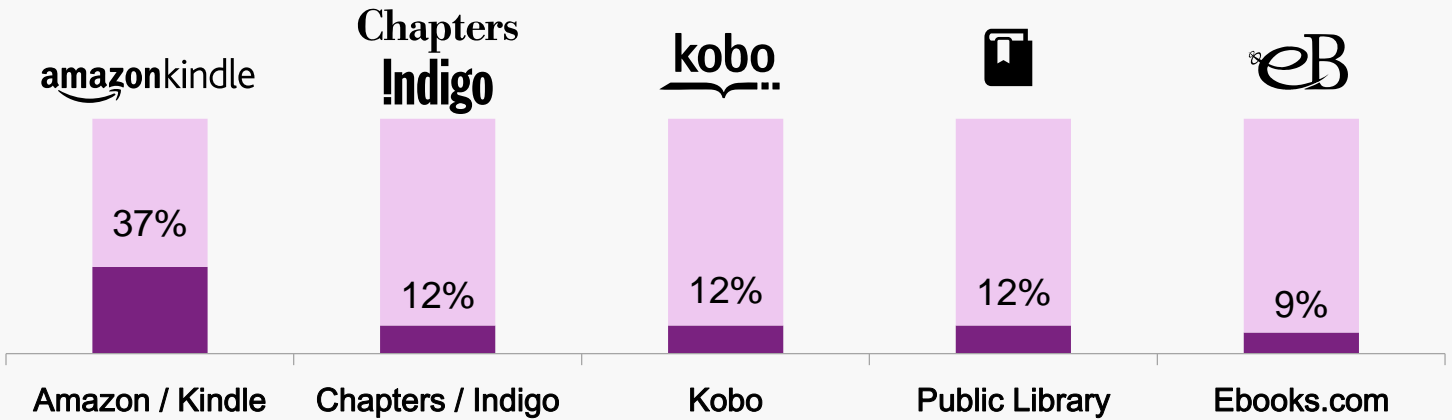
Streamed/ accessed e-books online

4.7M

Downloaded e-books online

TOP 5 SOURCES USED

The top 5 sources people used to stream/download/share e-books



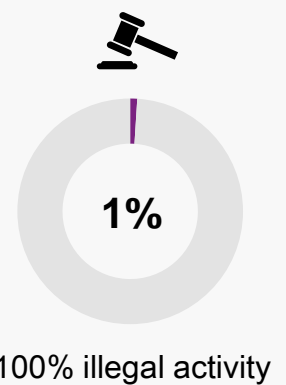
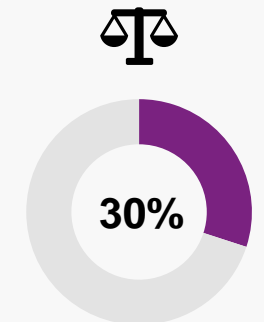
Base=723

QUARTERLY CONSUMER SPENDING

\$661M

PHYSICAL	84%	\$554M
DIGITAL	11%	\$72M
MERCHANDISE	5%	\$35M

INFRINGEMENT



Base=706

VIDEO GAMES

IN THE PAST 3 MONTHS



5.6M

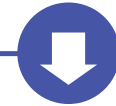
20% Canadian internet users consumed video games online



10%

2.8M

Streamed video games online



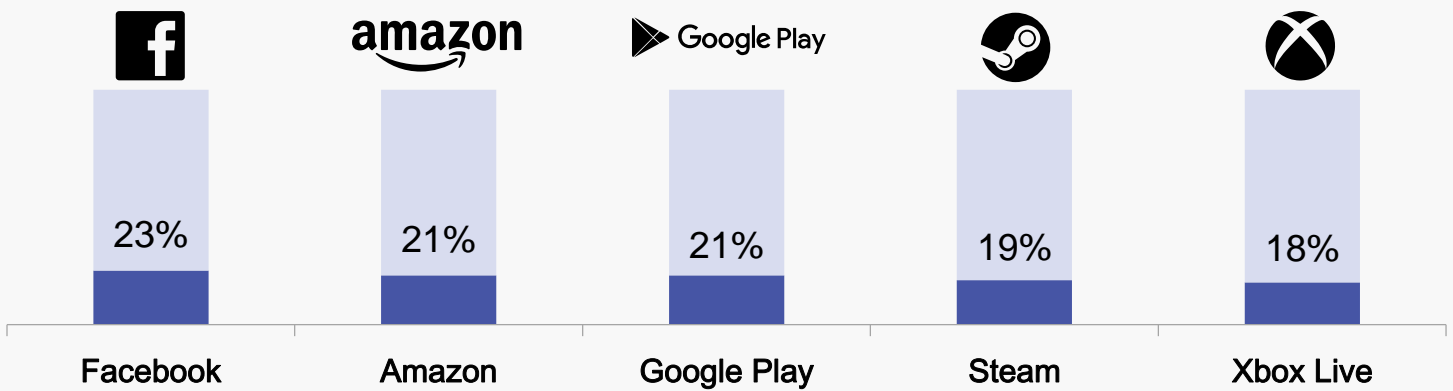
16%

4.5M

Downloaded video games online

TOP 5 SOURCES USED

The top 5 sources people used to stream/download/share video games



Base=693

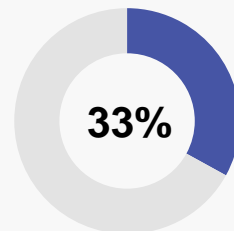
QUARTERLY CONSUMER SPENDING

\$860M

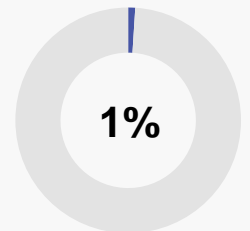
PHYSICAL	58%	\$503M
DIGITAL	29%	\$249M
MERCHANDISE	13%	\$108M



INFRINGEMENT



Any illegal activity



100% illegal activity

Base=681

COMPUTER SOFTWARE

IN THE PAST 3 MONTHS



5.6M

20% Canadian internet users consumed computer software online



8%

2.2M

Streamed/accessed computer software online



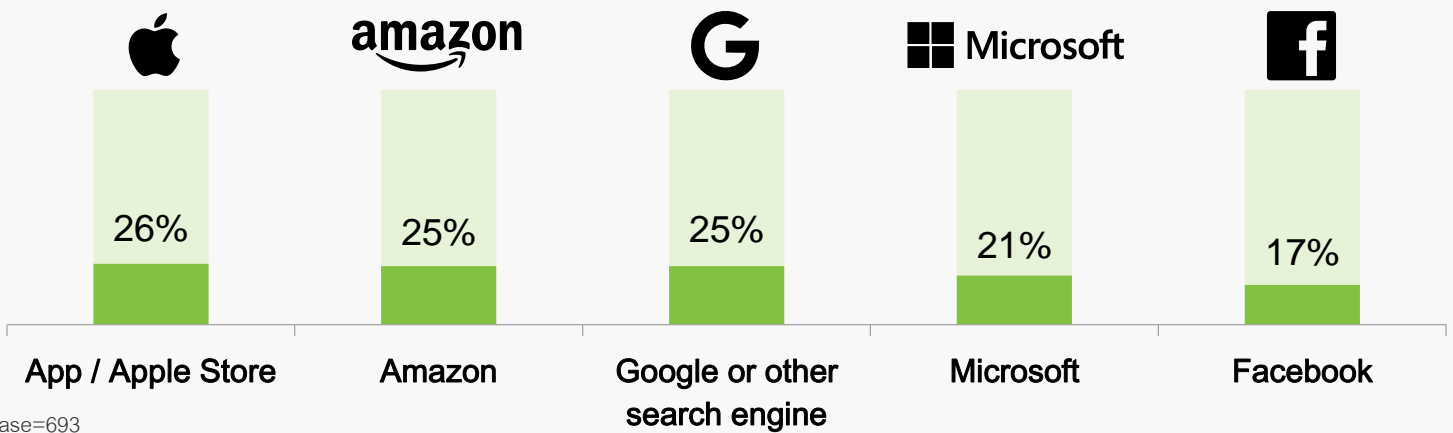
18%

5M

Downloaded computer software online

TOP 5 SOURCES USED

The top 5 sources people used to stream/download/share computer software

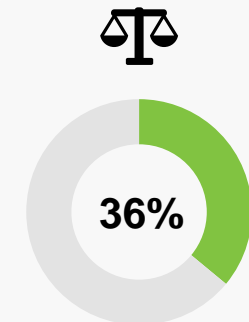


QUARTERLY CONSUMER SPENDING

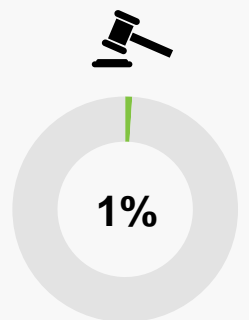
\$477M

PHYSICAL	70%	\$332M
DIGITAL	30%	\$145M

INFRINGEMENT



Any illegal activity



100% illegal activity

Base=683

ATTITUDES



REASONS FOR ILLEGAL CONSUMPTION INSTEAD OF PAYING

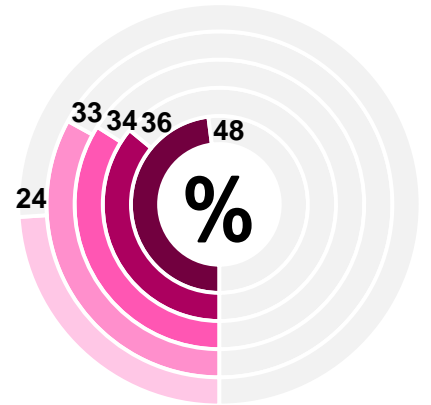
- 54% It's free
- 40% It's easy/convenient
- 34% It's quick
- 19% I can try something before I buy
- 19% I can't afford to pay

Base=1245

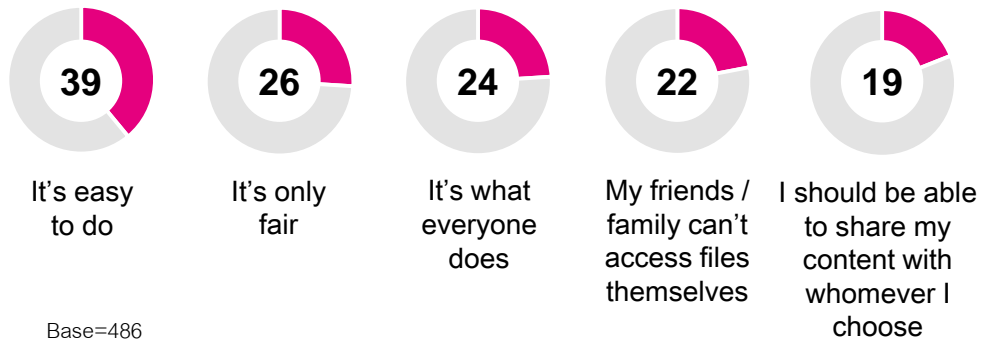
\$ REASONS FOR PAYING

- Easier/More convenient
- Quicker
- Better quality
- I don't want to use illegal sites
- I want to support creators/industry

Base=1394



REASONS FOR SHARING



Base=486

REASONS TO STOP CONSUMING ILLEGALLY



Base=743



CONFIDENCE KNOWING WHAT IS LEGAL

I am confident (very/slightly) in knowing what is legal 83%

Base=3252

INFRINGEMENT NOTICES AND USE OF SELECT TECHNOLOGIES



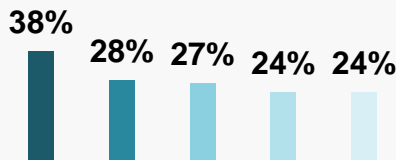
INFRINGEMENT NOTICES RECEIVED

10%



Base: Online content consumers (2728)

IMPACT OF RECEIVING INFRINGEMENT NOTICE



- Raised awareness of copyright infringement
- I/someone in my household took steps to ensure my home network was password protected
- I had a discussion with the people in my household about the alleged copyright infringement
- I/someone in my household stopped downloading/streaming from illegal sites
- Nothing, I ignored it

Base=257



VIRTUAL PRIVATE NETWORKS

VPN Users 21%

Base=3252



MOTIVATION FOR USING VPN

57

To secure communications, internet details and history

36

To access free content like movies, TV shows, etc.

32

To access other countries' content like movies, TV shows, etc. unavailable in Canada

27

To access content like movies, TV shows, etc. for a reasonable price

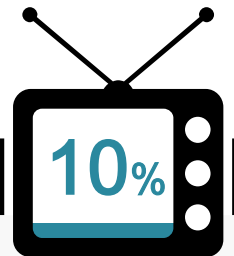
Base=710



TV SET TOP-BOX

TV Set Top-box users 10%

Base=3252



MOTIVATION FOR USING TV SET-TOP BOXES

To access:

Content I pay for	78%
Free content from legal sites and services	53%
Content that I own and are part of my personal library	28%
Content from sites I am not sure are legal or I know are not legal	16%
Live sports from sites I am not sure are legal or I know are not legal	11%

Base=375



STREAM RIPPING



Use stream-ripping service 11%

Base=3252

INTERNATIONAL COMPARISONS



INFRINGEMENT LEVELS



100% legal



Mix of legal and illegal



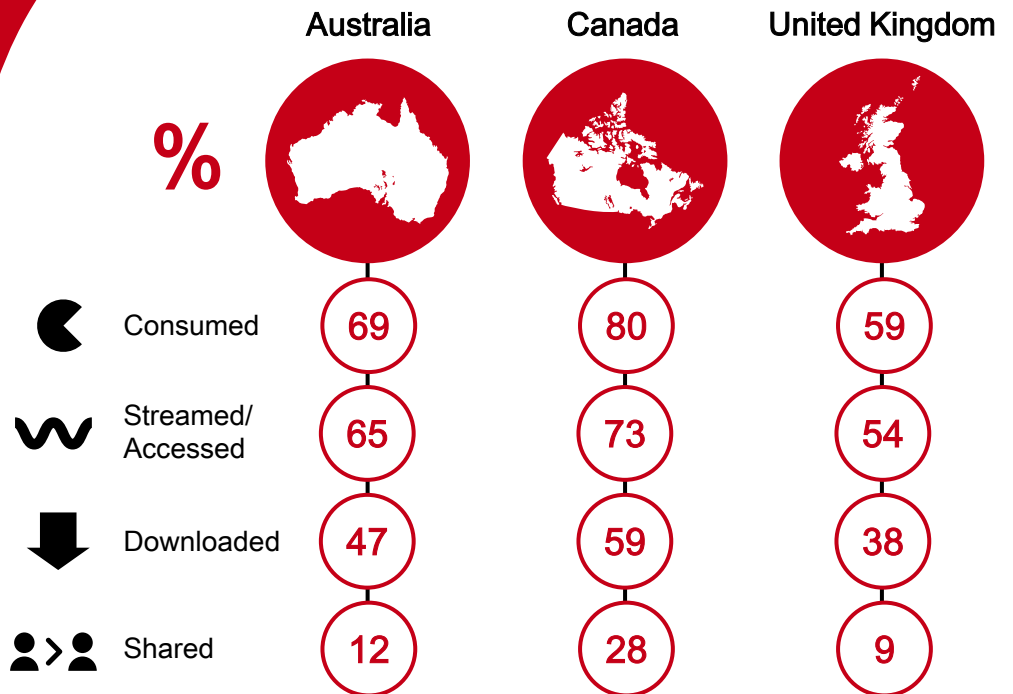
100% illegal



Any illegal

Base=Online content consumers

CONTENT CONSUMPTION



Base=All internet users 12+

AVERAGE QUARTERLY SPENDING (\$CAD)

	Music	TV Shows	Movies	Books	Video Games	Computer Software
Australia n=2607	\$100	\$25	\$68	n/a	\$37	n/a
Canada n=3301	\$64	\$11	\$35	\$22	\$28	\$16
United Kingdom n=4573	\$39	\$9	\$33	\$17	\$20	\$9

Base=Internet users 12+

These figures include spending on physical copies, tickets and merchandise.