

Main findings of the 2020 private copying survey

The objective of the survey was to investigate the total amount of private copying in Finland

- In 2020 music covered by legal private copying was copied by 203 000 and video material by over 757 000 Finns between 15–79 years of age. There were all in all over 900 000 copiers of music and video material. The number of people making copies has been in decline for the last couple of years. In 2014 there were still over 1.6 million people making private copies.
- In 2020 the estimate of the quantity (music and video files) of private copying is slightly lower than in 2019. The number of legal private copies taken by 15–79 year olds in Finland annually is estimated to be 258–276 million files. In the 2019 survey the corresponding estimate of private copying was 275–297 million files. In 2013–2017 the amount of private copying decreased from 725 million to about 260 million copies, and after that (2017–2020) has remained between 261 and 297 million copies.
- The 2020 study also investigated copying by 12–14 year old children. When copies made by them were added, the amount of private legal copying in 2020 among 12–79 year olds is 259–278 million files (400–451 million files in 2016).
- Mobile phone and computer are still the most common devices into which music content is copied. The most common platform for copying video content is still a recordable set-top box.
- The most often used sources for copying music are streaming services (offline saving), freely downloadable files from the internet (e.g. artists' own web pages) and original CD discs. Of these, only the music copied from original CD's is included in the figures of private copying. Copies of videos are most often copies of TV programmes.
- Over half of those who had copied music would have acquired the copied material from some other source, if the possibility of copying did not exist. Almost a third of those who copied music would have used chargeable sources for acquiring the music. The share of those who used a chargeable source was slightly lower than in the 2019 study. Over a third of those who had copied video files would have acquired the copied video material in some other way, if the possibility of copying did not exist. Chargeable source for acquiring video files would have been used by almost a fifth of the respondents. Regarding video files the shares are at the same level as in the 2019 study.
- Three out of four of the Finns have printed, saved, photocopied or scanned graphic material for private use during the past year. The most frequently used ways of copying are printing and saving. They also comprise the largest number of copies (number of pages). Photocopied or scanned materials are most often official forms or invoices/bank statements, printed materials in turn are most often photographs, official forms, recipes or educational materials. Publishers of the printed or saved graphic materials are most often private persons (webpages or blogs), a company (e.g. Valio), or public administration. The estimate of the number of pages covered by remuneration of private copying is 535–613 million pages (based on the material type classification of Kopiosto).

Research results in more detail

The main objective of the survey was to determine the amount of private copying regarding music and video material in Finland.

Similar information was recently gathered in 2019 by Taloustutkimus. In 2020 the 12–14 year old children were also included, in addition to the 15–79 year olds.

The survey also gives a comprehensive view into the use of entertainment electronics by the Finnish population, as well as their consumer-behaviour regarding music and video content. The study also investigated the harm caused by copying of music and video material. In addition the private copying of graphic material was investigated.

The results of the survey implemented by Taloustutkimus Oy are based on a broad sample representative of the population, over 3000 Finns between the ages 15–79 were interviewed face-to-face. Regarding the children (12–14 year olds) the data collection was conducted through Skype video-service. Based on the survey, altogether about one million Finns (margin of error is $\pm 3.1\%$ at confidence level of 95 %) copy music, movies and TV-programs for private use.

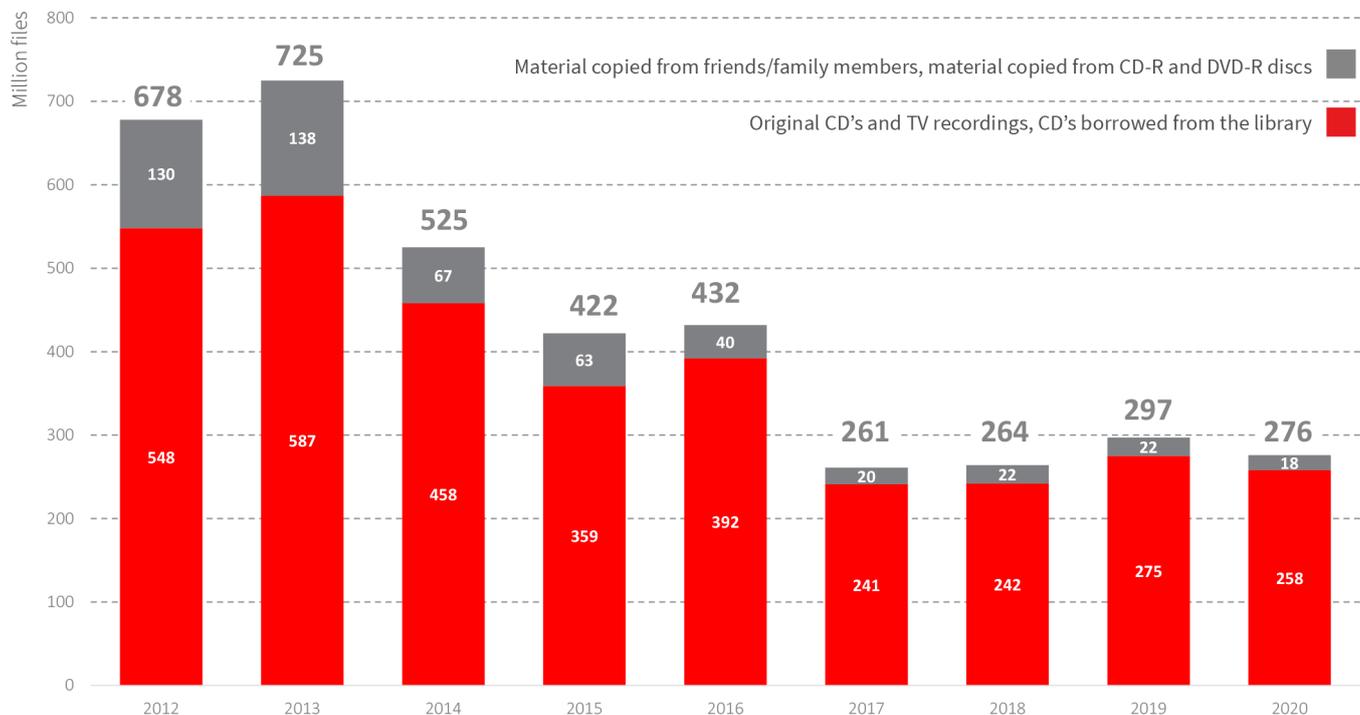
The total amount of annual private copying among the 15–79 year olds is approximately 258-276 million music and video files. This total number

(258 million files) includes only the legal private copying described in the Copyright Act. For example self-made material, illegal downloading, as well as copies included in the cost of chargeable services, or copies which are otherwise legal have been excluded.

The law also allows copying for friends and family members. On annual basis 18 million files of material are copied from friends and family members, or from CD-R and DVD-R discs. Because the origin of these files could not be clarified by the survey, the estimate of total amount of private copying is between 258 and 276 million copied files (picture 1 and table 1). When the saved files of 12–14 year olds are added, the estimate of total amount private copying is 259–278 million files. In the 2019 survey the estimate of private copying was 275–297 million files (15–79 year olds).

The total amount of copying in private households (also including non-remunerated private copying) is approximately 440 million files per year (15–79 year olds). When the 12–14 year olds are included, the total number is 451 million files. The total amount of copying in 2019 was 506 million files (15–79 year olds).

Private copying 2012–2020



Picture 1. Total amount of private copying in 2012–2020. Taloustutkimus 2020.

Copying of music files (thousand copies)

| Age group | | | | | | | | | | |
|-------------------------------------|---------|---------|--------|--------|--------|--------|--------|--------|--------|--------|
| Year | | | | | | | | | | |
| From original CD's | 192 631 | 164 090 | 65 688 | 89 474 | 47 680 | 21 532 | 51 018 | 55 973 | 90 293 | 56 002 |
| From CD-R, DVD-R, Bluray discs | 11 912 | 23 187 | 10 459 | 26 683 | 8 030 | 3 611 | 4 556 | 1 639 | 26 703 | 1 639 |
| From CD's borrowed from the library | 12 355 | 10 936 | 7 429 | 6034 | 1 302 | 4 255 | 9 053 | 3 225 | 6 034 | 3 376 |
| From friends/family members | 111 902 | 41 601 | 43 136 | 9 541 | 7 783 | 9 517 | 8 502 | 6 213 | 15 433 | 6 366 |
| | | | | | | | | | | |

Table 1a. Music. Total amount of private copying by source in 2013–2020. Taloustutkimus 2020.

Copying of video files (thousand copies)

| Age group | | | | | | | | | | |
|-----------------------------|---------|---------|---------|---------|---------|---------|---------|---------|--------|---------|
| Year | | | | | | | | | | |
| Video files from TV | 381 981 | 282 591 | 285 433 | 296 023 | 192 288 | 216 035 | 215 402 | 199 117 | 303448 | 199 947 |
| From friends/family members | 13 975 | 2 793 | 9 606 | 3 394 | 4 222 | 9 024 | 8 812 | 10 464 | 9449 | 11 137 |
| | | | | | | | | | | |

Table 1b. Video files. Total amount of private copying by source in 2013–2020. Taloustutkimus 2020.

When copying music (at the most recent occasion of copying) the most common sources among the 15–79 year olds are streaming services (30 %, margin of error ± 3.8 %p.), freely downloadable files from the internet, e.g. artists' own webpages (23 %, margin of error ± 3.6 %p.) and original CD discs (19 %, margin of error ± 3.3 %p.). Video files are most often copied from TV (61 % of respondents, margin of error ± 3.4 %p.). The most common devices onto which music content is copied are mobile phones and computers. Video files are most often saved onto a recordable set-top box.

According to the survey almost 3.9 million 15–79 year old Finns (margin of error ± 1.1 %) have a computer for their private use, over 3.8 million (margin of error ± 1.3 %) have a mobile phone on which music files can be saved. When 12–14 year olds are included, there are approximately

4 million (margin of error ± 1.20) users of mobile phones. Almost 3.3 million (margin of error ± 1.4 %) 15–79 year olds have a USB flash drive. Over 2.7 million Finns (margin of error ± 1.8 %) have a tablet device. When 12–14 year old children are included, almost 2.9 million Finns use a tablet device (margin of error ± 1.7 %). A separate MP3-player or iPod is only used by slightly over 840 000 (margin of error ± 1.4 %) 15–79 year olds.

Music streaming service Spotify, or some corresponding service is used by almost 2.3 million (margin of error ± 1.8 %) 15–79 year old Finns and with children (12–14 year olds) included, by over 2.4 million (margin of error ± 1.8 %). Internet cloud file storage services (like Dropbox, Google Drive, Apple iCloud etc.) are already used by almost 2.5 million (margin of error ± 1.8 %) 15–79 year old Finns (over 2.6 million 12–79 year olds, margin of error ± 1.8 %).

Netflix, HBO Nordic, Viaplay or some other monthly charged subscription streaming service is used by over 2.3 million 15–79 year old Finns (margin of error $\pm 1.8\%$). When 12–14 year olds are included, a monthly charged video rental service is used by almost 2.5 million 12–79 year olds (margin of error $\pm 1.8\%$). In 2019 over 2.1 million Finns were users of monthly charged VOD services.

Online storage services for TV programs, like Elisa Viihde, Telia TV with recording feature or a similar service, are already used by 1.2 million (margin of error ± 1.7) 15–79 year old Finns (over 1.3 million 12–79 year olds, margin of error $\pm 1.7\%$). The numbers regarding music and video services do not describe the number of customers of these services. The service can for example be used by the respondent, while it is subscribed to by another resident of the same household.

The survey also investigated the consumer behaviour of Finns regarding music and video material. Radio is still the most popular source of listened music. Of the 15–79 year old Finns who listen to music, 92 % listen to music from radio. The next most often used sources are Youtube (78 % of 15–79 year olds and 79 % of the 12–79 year olds) and physical recordings (64 % of the 15–79 year olds and 63 % of the 12–79 year olds). Youtube is used clearly more than physical recordings for listening music. Of the 15–79 year old users of Youtube and streaming services 65 % also listen to physical recordings.

Live TV broadcasts are watched at least sometimes by 92 % of the population. Internet TV broadcasts are watched by 80 % of the 15–79 year olds and 81 % of the 12–79 year olds. Watching material saved on recordable set-top boxes has decreased in recent years; they are watched by 32 % of 15–79 year old and 33 % of the 12–79 year olds. Of those who use Internet TV, online storage services and VOD streaming services (e.g. Netflix), 92 % also watch TV as live broadcasts. A larger share of the users of the aforementioned services still save TV content on recordable set-top boxes, than users of TV in general. Various devices and services are still used side by side for listening to music and watching videos.

Of the 15–79 year olds who had copied music, 52 % would have acquired the material in some other way, if the possibility of copying did not exist (54 % of the 12–79 year olds). Some chargeable service would have been used by 32 % of those who copied music (both 15–79 year olds and 12–79 year olds). The share of those acquiring music from chargeable source (15–79 year olds) is lower than in 2019. Less than a fifth (17 % of the 15–79 year olds and 16 % of the 12–79 year olds) of those who copied music would have purchased it as a recording (e.g. CD disc), if the possibility of copying did not exist. One tenth (10 % of the 15–78 year olds and 11 % of the 12–79 year olds) would have listened to music from a chargeable streaming service (e.g. Spotify) and less than tenth (6 % of the 15–79 year olds and 5 % of the 12–79 year olds) would have purchased the music as an audio file. Free streaming service (e.g. Youtube) would have been used by more than one tenth (14 % of the 15–79 year olds and 16 % of the 12–79 year olds) of those who had copied music. Of those who copied music, 6 % would have borrowed it from a friend or a library (both the 15–79 year olds and 12–79 year olds). Chargeable music streaming services are mentioned among the 15–79 year olds more often than in 2019 study.

Of those who had saved video material, more than a third (36 %) would have acquired the material in some other way, if the possibility of copying did not exist. In the 12–79 year old age group the share is the same. Some chargeable service would have been used by less than a fifth (17 % of both 15–79 year olds and 12–79 year olds) of those who had copied video files.

Of those 15–79 year olds who had copied video files 6 % would have viewed the audiovisual content from a chargeable streaming service (e.g. Ruutu+, Netflix, Viaplay). The share is the same among 12–79 year olds. Of those who had copied video files 6 % (of both 15–79 and 12–79 year olds) would have bought the material as a recording (e.g. DVD disc). Of the 15–79 year olds 4 % would have rented the movie (e.g. Elisa Viihde). With the 12–79 year olds the corresponding share is 5 %. The material would have been viewed from a free streaming service (e.g. YLE Areena, Katsomo, Ruutu) by 13 % of those who had copied video material (12 % of the 12–79 year olds). 7 % of those who had saved video files (both the 15–79 and 12–79 year olds) would have borrowed it from a friend or library.

The 15–79 year olds who had copied music files estimate, that they listen to a copied piece of music 58 times on average (65 times in 2019). When answers from 12–14 year olds are included, the average number of times is 56. The 15–79 year olds who had copied audiovisual material estimate they view it an average of 8 times (approx. 4 times in 2019). The number in 2020 is the same for the 12–79 year old target group and the 15–79 year olds.

What is the definition of private copying in the survey?

In this survey private copying means the copying of music and videos from original sources (original CD's, TV-broadcasts). The study has aimed to exclude such private copies, where the legality or lack of legality of the source is unknown. The law also allows copying from friends and family members. Because the interviews are not capable of providing conclusive information about the origin of the music copied from friends and family members, the estimate of the total amount of copying is presented as an estimate between two figures, the lower end including copying from original sources only and the upper end a figure also including material copied from friends and family members, as well as music copied from CD-R, DVD-R and Blueraay discs.

Licensed material bought online, material downloaded from illegal sources and automatic back-up copying has been demarcated outside private copying. The question setting of the survey also excludes self-made music, self-taped videos or other self-made video material, as well as the copying of music or video material for professional use.

Copying of graphic material

In 2017 the copying frequency of graphic material was asked about for the total of all copying methods. In 2018 the question was changed so, that the copying frequency was asked about separately for each copying method.

According to the 2020 study, three out of four (76 %) of the 15–79 year olds have copied some graphic material at least sometimes during the year. Of the respondents 48 % said they had saved digital graphic material digitally during the past year. Digital material was printed on paper last year by 60 % of the respondents. Graphic material on paper was photocopied on paper by 47 % of the respondents and graphic material on paper was scanned into digital form by 46 % of the respondents. The shares are the same in target groups of 15–79 and 12–79 year olds. Of those 15–79 year olds, who had copied graphic material (book, newspaper article, picture, sheet music etc.) at least sometimes 36 % printed it, 31 % saved it, 15 % photocopied it and 14 % scanned the material on the most recent occasion of copying.

The most recent graphic material photocopied or scanned for private use was most often a form, e.g. official form (18 % of the 15–79 year olds and 17 % of the 12–79 year olds), or an invoice/bank statement or such (15 % of both the 15–79 and 12–79 year olds). The most recent graphic material printed or saved for private use was most often a photograph (20 % of the 15–79 year olds and 22 % of the 12–79 year olds), official form (18 % of the 15–79 year olds and 17 % of the 12–79 year olds), a recipe (13 % of the 15–79 year olds and 12 % of the 12–79 year olds) or learning material (20 % of both the 15–79 and 12–79 year olds). The publisher of the most recent graphic material printed or saved for private use was most often a private person, e.g. webpage or blog of a private person (21 % of both the 15–79 and 12–79 year olds), some company (16 % of both the 15–79 and 12–79 year olds) or public administration (15 % of the 15–79 year olds and 14 % of the 12–79 year olds).

During the past year altogether 730 million pages of graphic material was copied by 15–79 year olds and 740 million pages by 12–79 year olds. The largest number of copying was from digital into digital (over 387 million pages). The next largest shares are for from digital onto paper (about 250 million pages), paper photocopied on paper (about 45 million pages) and scanned from paper into digital form (about 46 million pages). The number of pages is slightly higher, when answers from 12–14 year olds are included: saving was 340 million pages, printing 252 million pages, scanning 46 million pages and photocopying 45 million pages. The number of pages is classified according to the type of most recently copied material into non-remunerated, remunerated and partially remunerated material. This classification is based on the generally used classification of materials by Kopiosto. Based on this classification the amount of remunerated material is approximately 535–613 pages among the 15–79 year olds and approximately 545–624 million pages among 12–79 year olds.

How the survey was conducted?

The survey was conducted mainly by face-to-face interviews as part of the Taloustutkimus Omnibus consumer survey. The target group comprised of 15–79 year old Finnish consumers, excluding Åland. Interviews were also conducted with 12–14 year old children. Because of exceptional circumstances (Corona pandemic) some of the interviews were conducted via Skype video service. Altogether 3164 interviews were conducted, 164 of them among 12–14 year olds.

The sample was created through quota sampling, in which the determining quotas were the national distribution of age and gender, as well as the county and municipality distribution. The sample was weighted to correspond with the target group. The weighted N-figures correspond to the Finnish 12–79 year old population in thousands (Official Statistics of Finland 31st December 2019). The 15–79 year olds of the target group were interviewed personally from 4th March to 13th March and from 28th May to 5th October. The 12–14 year olds of the target group were interviewed mainly with Skype -video interviews from 13th March to 23rd September. The interviewing work was conducted by interviewers trained by Taloustutkimus, six of them for the interviews of 12–14 year olds and 28 for the 15–79 year olds. The respondents of the survey were from 150 different localities.

The output was done by using the T-test which tests whether each tabulated background variable differs from other respondents more than the amount of random variation at confidence level of 95 %. The survey includes a calculated estimate on the total amount of files copied per year, using weighted coefficients to represent the population. The estimate has been calculated according to the number of copies made during the most recent occasion of copying by the respondent, and a coefficient to express the respondents copying frequency

Copyright Act

The Copyright Act states that everyone has the right to copy published works e.g. music, movies and TV programs for private use. The Act provides remuneration for private copying, which the state pays to the authors, performers and producers for the copying of their works for private use. Private copying and its prevalence are researched to enable determining the remuneration correctly.

taloustutkimus

Taloustutkimus Oy is a Finnish full-service market research company established in 1971. Taloustutkimus employs approximately 70 full-time market research professionals in Finland and about 300 interviewers around the country. In addition to the headquarters in Helsinki, there are domestic regional offices in Tampere, Turku and Oulu. The company has foreign subsidiaries and affiliate companies in Russia and all the Baltic countries. Taloustutkimus is a member of the international WIN-network, which operates in over 50 countries.

In all its research activities Taloustutkimus follows the research standards of the International Chamber of Commerce (ICC) and ESOMAR (the European Society for Opinion and Marketing Research).

Taloustutkimus also uses the international market research industry standard ISO 20252, which has been certified by SGS Finland.

