

## Main findings of the 2022 private copying survey

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

- According to the study, music covered by legal private copying was copied by 141 000 and video material by over 762 000 residents of Finland between 15-79 years of age. There were altogether about 851 000 copiers of music and video material. The number of people making copies has been in decline year by year. However, in 2022 the total number of people making copies is approximately the same as in 2021. In 2014 there were still almost 1.6 million people making private copies.
- In 2022 the estimate of the total number of private copies (music and video files) is lower than in the 2021 study. Both music and video files were copied less than in the previous year.
- The overall estimate of legal private copying of music and video files among 15–79 year olds during the year is 197–213 million files. The corresponding estimate of the amount of private copying in the 2021 study was 226–257 million files. In 2013–2017 the amount of private copying decreased from 725 million to about 260 million copies, and after that (2017–2022) has remained between 197 and 297 million copies.
- Mobile phone and computer are 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 and the next most often used are online recording services for tv-programs. 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. Regarding 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. More than a third of those who copied music would have used chargeable sources for acquiring the music. A chargeable streaming service was mentioned as a source less often than in the 2021 study. Less than 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 would have been used by more than a tenth of the respondents.
- Four out of five of the residents of Finland have printed, saved, photocopied or scanned graphic material for private use during the past year. The most frequently used ways of copying are saving and printing, which also comprise the largest number of copies when considered in terms of pieces (number of pages). Photocopied or scanned materials are most often official forms or invoices/bank statements. Printed or saved materials in turn are most often photographs, official forms, recipes, educational materials or articles. Publishers of the printed or saved graphic materials are most often private persons (webpages or blogs), a company (e.g. Valio), or public administration. Regarding graphic material, the estimate of the number of pages covered by remuneration of private copying is 622–682 million pages. The basis of the estimate is the material type classification of Kopiosto).

# Summary or the results

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

Similar information was last gathered in 2021 by Taloustutkimus.

In addition to the estimates regarding private copying, the survey also gives a comprehensive view into the use of entertainment electronics by residents of Finland, 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, regarding graphic materials, the study investigated the frequency of private copying, as well as the total amount of copying.

The results of the survey implemented by Taloustutkimus Oy are based on a broad sample representative of the population, over 3000 people between the ages 15–79 were interviewed face-to-face. Based on the survey, altogether 851 000 (margin of error is  $\pm 3.1\%$  at confidence level of 95 %) residents of Finland copy music, movies and TV-programs for private use.

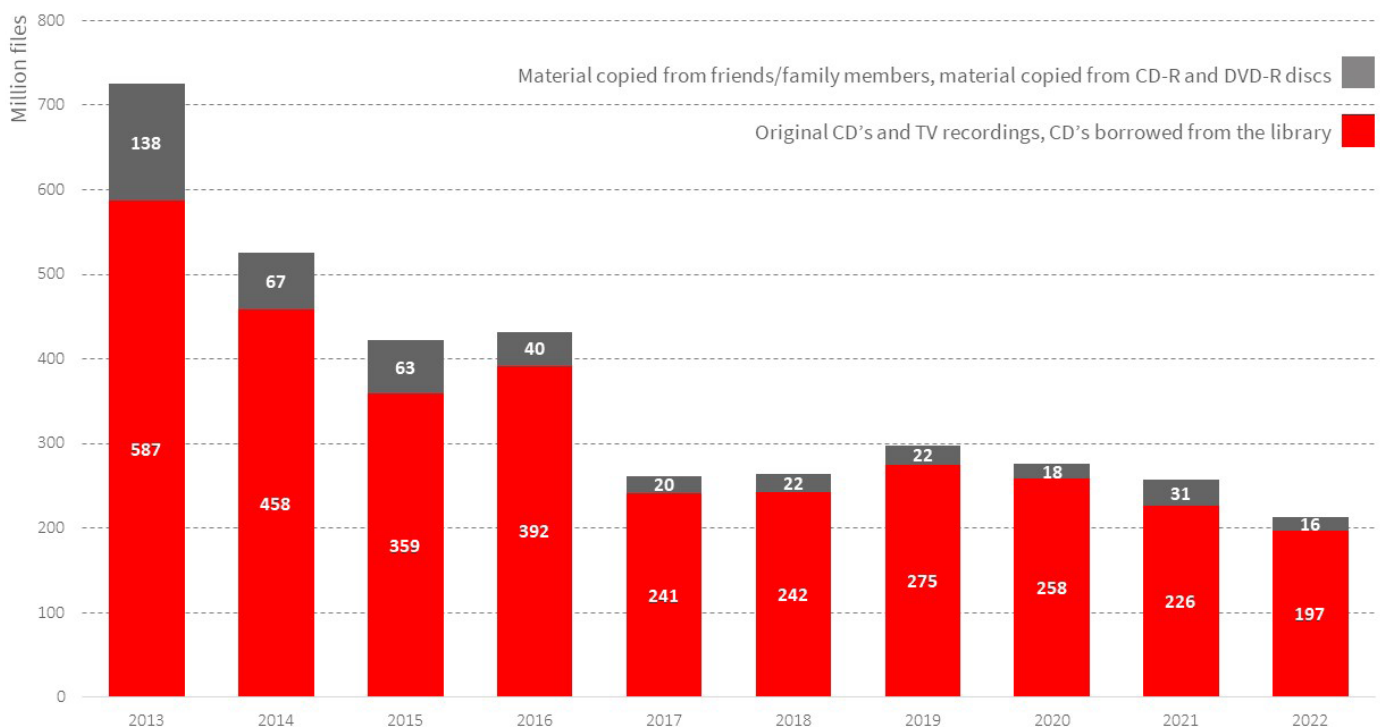
The total amount of annual private copying among the 15-79 year olds is approximately 197–213 million music and video files. This total number (197 million files) includes only the legal private copying described in the Copyright Act. For example self-made material, illegal downloading, as well as copies 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 16 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 197 and 213 million copied files (picture 1 and table 1). In the 2021 survey the estimate of private copying was 226–257 million files.

The total amount of copying in private households (also including non-remunerated private copying) is approximately 277 million files per year. The total amount of copying in 2021 was 380 million files.

## Private copying 2013–2022

Picture 1. Total amount of private copying in 2013–2022. Taloustutkimus 2022.



## Copying of music files (thousand copies)

Table 1a. Music. Total amount of private copying by source in 2014–2022. Age group of 15–79 year olds. Taloustutkimus 2022.

Year	2014	2015	2016	2017	2018	2019	2020	2021	2022
From original CD's	164 090	65 688	89 474	47 680	21 532	51 018	55 973	36 614	25 883
From CD-R, DVD-R, Blu-ray discs	23 187	10 459	26 683	8 030	3 611	4 556	1 639	8 685	2 687
From CD's borrowed from the librar	10 936	7 429	6034	1 302	4 255	9 053	3 225	14 175	7 889
From friends/family members	41 601	43 136	9 541	7 783	9 517	8 502	6 213	14 053	4 299
<b>Total private copying</b>	<b>239 814</b>	<b>126 712</b>	<b>131 732</b>	<b>64 795</b>	<b>38 915</b>	<b>73 129</b>	<b>67 050</b>	<b>73 527</b>	<b>40 758</b>

Estimates according to the most recent occasion of copying, by using coefficients representing the population.

## Copying of video files (thousand copies)

Table 1b. Video files. Total amount of private copying by source in 2014–2022. Age group of 15–79 year olds. Taloustutkimus 2022.

Year	2014	2015	2016	2017	2018	2019	2020	2021	2022
Video-tiedostoja televisiosta	282 591	285 433	296 023	192 288	216 035	215 402	199 117	174 830	163 247
Kavereilta/perheen-jäseniltä	2 793	9 606	3 394	4 222	9 024	8 812	10 464	8 567	9 125
<b>Total private copying</b>	<b>285 384</b>	<b>295 039</b>	<b>299 417</b>	<b>196 510</b>	<b>225 059</b>	<b>224 214</b>	<b>209 581</b>	<b>183 397</b>	<b>172 372</b>

Estimates according to the most recent occasion of copying, by using coefficients representing the population.

When copying music at the most recent occasion of copying, the most common sources are streaming services (34 %, margin of error  $\pm 3.9$  %p.), freely downloadable files from the internet, e.g. artists' own webpages (18 %, margin of error  $\pm 3.6$  %p.) and original CD discs (15 %, margin of error  $\pm 3.2$  %p.). Video files are most often copies of TV programs (60 % of respondents, margin of error  $\pm 3.4$  %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 4 million 15–79 year olds (margin of error  $\pm 0.99$  %) have a computer and mobile phone for their private use, on which music files can be saved. Over 3.3 million (margin of error  $\pm 1.6$  %) 15–79 year olds have a USB flash drive. Over 2.5 million (margin of error  $\pm 1.78$  %) 15–79 year olds have a tablet device. A separate MP3-player or iPod is used by about 776 000 (margin of error  $\pm 1.4$  %) 15–79 year olds.

Music streaming service Spotify, or some corresponding service is used by almost 2.5 million (margin of error  $\pm 1.8$  %) 15–79 year olds. Internet cloud file storage services (like Dropbox, Google Drive, Apple iCloud etc.) are already used by almost 2.8 million (margin of error  $\pm 1.7$  %) 15–79 year olds.

Netflix, HBO Max, Elisa Viihde Viaplay or some other monthly charged subscription streaming service is used by about 2.7 million 15–79 year olds (margin of error  $\pm 1.8$  %). In 2021 over 2.5 million Finns were users of monthly charged VOD services.

Online storage services for TV programs, like Elisa Viihde, Telia TV with recording feature, DNA TV or a similar service, is used by almost 1.3 million (margin of error  $\pm 1.7$ ) 15–79 year olds. 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 the residents of Finland regarding the consumption of music and video material. Radio is still the most popular source of listened music. Of the 15–79 year olds who listen to music, 90 % listen to music from radio (95 % in 2021). The next most often used source is Youtube (80 %). Music from physical recordings is at least sometimes listened to by 57 % of the 15–79 year olds. Among the users of Youtube and free or chargeable music streaming services, the share of those who listen to physical recordings is larger, than in the population as a whole (63 % of the users of these services listen to physical recordings).

Live TV broadcasts are watched at least sometimes by 90 % of the population and Internet TV broadcasts are watched by 83 %. The next most often used channel to view video content is Youtube. Usage of Youtube has increased clearly during the past years. Material saved on recordable set-top boxes is watched by 28 % of the 15–79 year olds. Of those who use Internet TV, online storage services and VOD streaming services (e.g. Netflix), 90 % also watch TV as live broadcasts. A larger share of the users of the aforementioned services also saves TV content on recordable set-top boxes, than users of TV in general.

Of the 15–79 year olds who had copied music, 51 % would have acquired the material in some other way, if the possibility of copying did not exist. Some chargeable service would have been used by 34 % of those who copied music. The share of those acquiring music from chargeable source is lower than in 2021. Less than a fifth (15 %) of those who copied music would have purchased the music as a recording (e.g. CD disc), if the possibility of copying did not exist. Over a tenth (12 %) of those who copied music, would have listened to music from a chargeable streaming service (e.g. Spotify) and a similar share (12 %) of those who had copied music would have acquired the music from a free streaming service (e.g. Youtube). Less than a tenth (7 %) would have purchased the music as an audio file. Music would have been borrowed from a friend/library only by 4 % of those who copied music. Chargeable music streaming services are mentioned less often, than in the 2021 study.

Of the 15–79 year olds, who had saved video material, about a third (32 %) would have acquired the material in some other way, if the possibility of copying did not exist. Some chargeable service would have been used by over a tenth (14 %) of those who copied video files. Of those who had copied video files 8 % would have viewed the audiovisual content from a chargeable streaming service (e.g. Ruutu+, Netflix, Viaplay). Of those who had copied video files 3 % would have bought the material as a recording (e.g. DVD disc) and 4 % would have rented the movie (e.g. Elisa Viihde). 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. The video material would have been borrowed from a library or friend by 4 % of those who had saved video files.

The 15–79 year olds who had copied music files estimate, that they listen to a copied piece of music 54 times on average (58 times in 2021). The 15–79 year olds who had copied audiovisual material estimate they view it an average of 5 times (approx. 5 times in 2021).

### **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 Blu-ray discs.

Licensed material bought online, material downloaded from illegal sources and automatic back-up copying have 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.

In 2022 four out of five (79 %) of the 15–79 year olds have copied some graphic material at least sometimes during the year. Of the respondents 58 % said they had saved digital graphic material digitally during the past year. Digital material was printed on paper last year by 62 % of the respondents. Graphic material on paper was photocopied on paper by 46 % of the respondents, and graphic material on paper was scanned into digital form by 45 % of the respondents. Of those 15–79 year olds, who had copied graphic material (book, newspaper article, picture, sheet music etc.) at least sometimes 42 % saved it, 32 % printed it, 12 % photocopied it and 11 % 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 (25 %), or an invoice/bank statement or such (15 %). The most recent graphic material printed or saved for private use was most often a photograph (21 %), official form (19 %), a recipe (10 %), learning material (9 %), or an article (8 %). 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 %), some company (19 %) or public administration (14 %). The shares are at the same level as in the 2021 study.

During the past year altogether 800 million pages of graphic material was copied by 15–79 year olds. The largest number of copying was from digital into digital (about 380 million pages). The second most often used way was from digital onto paper (over 297 million pages). The next most frequent was photocopying from paper to paper (about 85 million pages) and scanned from paper into digital (about 39 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 622–682 pages (415–489 million pages in 2021).

### How the survey was conducted?

The survey was conducted by face-to-face interviews. The target group comprised of 15–79 year old Finnish consumers, excluding Åland. Altogether 3021 people were interviewed.

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 15–79 year old population in thousands (Official Statistics of Finland 31st December 2021). The face-to-face interviews were conducted from 3rd February to 31st May 2022. Interviewing work was done by 43 interviewers trained by Taloustutkimus. The respondents of the survey were from 153 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 60 full-time market research professionals in Finland and about 200 interviewers around the country. In addition to the headquarters in Helsinki, there are domestic regional offices in Tampere 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.*

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