

Main findings of the 2018 private copying survey

- The survey investigated the total amount of private copying in Finland.
- Music and video material covered by legal private copying is copied by less than a quarter of 15-79 year old Finns (fewer than 240 000 Finns). The number of people making copies has been in decline in the last couple of years. In 2014 there were still over 520 000 people making private copies.
- In 2018 the estimate of quantity of private copying is at the same level as in the 2017 survey. Finns (15-79 years of age) made altogether 242-264 million files of legal private copies during the year. In the 2017 survey the corresponding estimate of private copying was 241-261 million files.
- Mobile phone and computer are still the most common devices into which music content is copied. The most common device for copying video content is, as in previous years, a recordable set-top box.
- The most common original sources for copying music are freely downloadable files from the internet (e.g. artists' own web pages) and streaming services (material saved in offline mode), as well as original CD discs. TV-broadcast is the most often used source of copied videos. The most widely used sources of music and video files are the same as in 2017. TV is mentioned as the source of saved videos slightly less often than in 2017.
- The usage of streaming services for music and audio-visual content, online storage services for music and video files, as well as the usage of web TV has increased further.
- Traditional methods of listening to music and viewing video content are still used.
- Two out of five of those who had copied music would acquire the copied material from some chargeable source, if the possibility of copying did not exist. Less than fifth of those who had copied video files would use chargeable sources for acquiring the materials, if the possibility of copying did not exist.
- Three out of four of the Finns have copied (saved/printed/photocopied/scanned) graphic material for private use during the past year. A majority of the saving events are digital printing on paper and saving digital material digitally.
- When examined by number of pages, almost 3 billion pages of graphic material has been copied (photocopied/scanned/printed/saved). By number of pages the largest amount was digital printing of graphic material on paper.

The main objective of the survey was to determine the amount of private copying of music and video material in Finland. Similar information was recently gathered in 2017 by Taloustutkimus. 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.

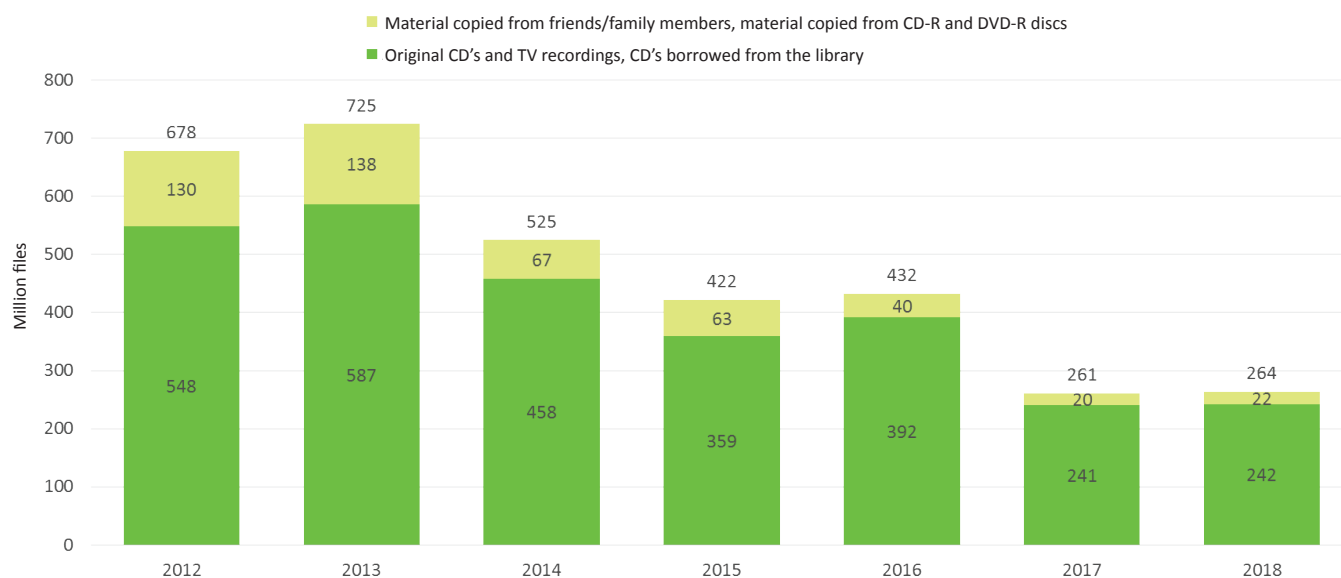
The results of the survey implemented by Taloustutkimus Oy are based on a broad sample representative of the population, over 3000 Finns between the ages 15-79 were interviewed face-to-face. Based on the survey, altogether about one million Finns (margin of error is ±3.1 % at confidence level of 95 %) copy music, movies and TV-programs for private use.

The total amount of annual private copying among the 15-79 year olds is approximately 242-264 million music and video files. All other copying, except legal private copying – e.g. self-made material, illegal downloading and copies which have been paid for through other means (e.g. iTunes) – has been excluded from the 242 million copied files.

The law also allows copying for friends and family members. On an annual basis 22 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 242 and 264 million copied files (picture 1 and table 1).

In the 2017 survey the estimate of amount of private copying was 241-261 million files (15-49 year olds). The estimate of total amount of private copying in 2018 is at the same level as in 2017. The total amount of copying in private households (also including non-remunerated private copying) is approximately 418 million files per year (15-79 year olds).

Private copying 2012-2018



Picture 1. Total amount of private copying in 2012 – 2018. Taloustutkimus 2018.

Music, 15-79 year olds						
Million files (pcs)	2013	2014	2015	2016	2017	2018
From original CD's	192 631	164 090	65 688	89 474	47 680	21 532
From CD-R, DVD-R, Bluray discs	11 912	23 187	10 459	26 683	8 030	3 611
From CD's borrowed from the library	12 355	10 936	7 429	6 034	1 302	4 255
From friends/ family members	111 902	41 601	43 136	9 541	7 783	9 517
Total (private copying)	328 800	239 814	126 712	131 732	64 795	38 915

Table 1a. Music. Total amount of private copying by source in 2013-2018. Taloustutkimus 2018.

Video files, 15-79 year olds						
Million files (pcs)	2013	2014	2015	2016	2017	2018
Video files from TV	381 981	282 591	285 433	296 023	192 288	216 035
From friends/ family members	13 975	2 793	9 606	3 394	4 222	9 024
Total (private copying)	395 956	285 384	295 039	299 417	196 510	225 059

Table 1b. Video files. Total amount of private copying by source in 2013-2018. Taloustutkimus 2018.

When copying music the most common sources are freely downloadable files from the internet, e.g. artists' own webpages (24 %, margin of error ± 3.6 %p.), streaming services (22 %, margin of error ± 3.3 %p.) and original CD discs (21 %, margin of error ± 3.3 %p.). Video files are most often copied from TV (68 % of respondents, margin of error ± 3.2 %p.). The most common devices onto which music content is copied are still mobile phone and computer. 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 3.6 million (margin of error ± 1.3 %) have a mobile phone on which music files can be saved and almost 3.4 million (margin of error ± 1.4 %) have a USB flash drive. Almost 2.7 million Finns (margin of error ± 1.8 %) have a tablet device. A separate MP3-player or iPod is used by less than 1.2 million Finns (margin of error ± 1.7 %).

Music streaming service Spotify, or some corresponding service is used by almost 2 million (margin of error ± 1.8 %) Finns (in 2017 there were over 1.8 million users).

Internet cloud file storage services (like Dropbox, Google Drive, Apple iCloud, Microsoft Skydrive etc.) are already used by almost 2.3 million Finns (margin of error ± 1.8 %). In 2017 there were over 2.1 million users. Netflix, HBO Nordic, Viaplay or some other monthly charged subscription streaming service is used already by almost 2 million Finns (margin of error ± 1.8 %). In 2017 1.7 million Finns reported using monthly charged VOD services. Online storage services for TV programs, like Elisa Viihde, Sonera Viihde or similar, are used by over one million Finns.

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 overwhelmingly most popular source of listened music. Of the Finns who listen to music, 94 % listen to music from radio. Physical recordings and Youtube are the next most common ways of consuming music. Among those who listen to music weekly Youtube is clearly used more than physical recordings. Music is listened to from Youtube monthly by 35 % of Finns. Physical recordings are listened to monthly by 35 % of Finns. Of the users of Youtube and streaming services 75 % also listen to physical recordings. The share is the same as last year.

Live TV broadcasts are watched at least sometimes by 92 % of Finns. Internet TV broadcasts are watched by 74 % of Finns. Material saved on recordable set-top boxes is watched by 38 % of 15-79 year old Finns. 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 these services still saves TV content on recordable set-top boxes, than Finns in general.

Cross-usage regarding equipment and services still remains visible in the results. Traditional methods of consuming music and video material are still used alongside the new devices and services.

Of those who had copied music, 65 % 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 43 % of those who copied music. Every fifth (20 %) of those who copied music would have purchased it as a recording (e.g. CD disc), if the possibility of copying did not exist. Less than a fifth (16 %) would have listened to music from a chargeable streaming service (e.g.

Spotify) and less than every tenth (7 %) would have purchased the music as an audio file. Free streaming service (e.g. Youtube) would have been used by 18 % of those who had copied music and 4 % of them would have borrowed the music from a friend or a library. Free music streaming services are mentioned more often than in the 2017 study.

Of those who had saved video material, more than a third (37 %) 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 less than a fifth (18 %) of those who had 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), 7 % would have bought the material as a recording (e.g. DVD disc) and 3 % 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 18 % of those who had copied video material and 1 % of them would have borrowed it from a friend or library. Free audiovisual streaming services are mentioned more often than in the 2017 study.

Those who had copied music files estimate, that they listen to a copied piece of music 41 times on average (49 times in 2017). Those who had copied audiovisual material estimate they view it an average of three times (approx. 4 times in 2017).

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 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 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.

Three out of four (73 %) of the 15-79 year olds have copied some graphic material at least sometimes during the year. Of the respondents 56 % said they had saved digital material digitally during the past year. Digital material was printed on paper last year by 59 % of the respondents. Graphic material on paper was photocopied on paper by 48 % of the respondents and graphic material on paper was scanned into digital form by 44 % of the respondents.

Of those who had copied graphic material (book, newspaper article, picture, sheet music etc.) at least sometimes 36 % printed it, 29 % photocopied it, 19 % saved it and 13 % scanned it 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 (21 %), invoice/bank statement or such (16 %), or schoolbook or nonfiction book (9 %).

The most recent graphic material printed or saved for private use was most often a form (19 %), photograph (19 %), learning material (12 %) or a recipe (10 %).

The publisher of the graphic material most recently printed or saved for private use has usually been a private person, e.g. the homepage or blog of a private person (24 %), some company (18 %), publisher of books or magazines (11 %) or public administration (13 %).

HOW THE SURVEY WAS CONDUCTED?

The survey was conducted by face-to-face interviews as part of the Taloustutkimus Omnibus consumer survey. The questions were included in three consecutive rounds of Omnibus and they were presented to altogether 3036 respondents. The target group comprised of 15-79 year old Finnish consumers, excluding Åland.

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 2017).

The interviews were conducted between 9th March and 8th May 2018. The interviewing work was conducted on different rounds by 43 – 49 interviewers trained by Taloustutkimus. In the first round interviews were conducted at 80 localities, in the second round at 86 localities and in the third round at 96 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.

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 a 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 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 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.

