

Main findings of the 2019 private copying survey

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

- Music covered by legal private copying was copied by 210 000 and video material by over 890 000 people between 15–79 years of age, who live in Finland. There were all in all over a million 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 2019 the estimate of the number of copies is slightly higher than in 2018. Music files have been copied more than in 2018. Regarding video files the number is almost the same as in 2018. Finns (15–79 years of age) made altogether 275–297 million files of legal private copies during the year. In the 2018 survey the corresponding estimate of private copying was 242–264 million files.
- 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 original sources for copying music are streaming services (material saved in offline mode), 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. Copies of videos are most often copies of TV programmes.
- On the most recent occasion of copying music has been copied from streaming services clearly more often than in 2018. Copying of TV programmes on recordable set-top boxes has decreased slightly when compared with previous years.
- Based on the research results the number of users of streaming services for music and videos, as well as of chargeable web TV services continues to increase.
- 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 third of those who copied music would have used chargeable sources for acquiring the music. The shares of those who acquired the music material some other way and those who used a chargeable source for it are lower than in the 2018 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. There has been no significant change in the amount from 2018. Chargeable source for acquiring video files would have been used by a similar share of respondents as in the 2018 study (18 % of those who had saved video content).
- 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 official forms, photographs, educational materials or recipes. Publishers of the printed or saved graphic materials are most often private persons (webpages or blogs), public administration or a company (e.g. Valio). Estimate of the number of pages covered by remuneration is 534-1276 pages (according to the classification of material types used by Kopiosto).

More about the findings

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 2018 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 $\pm 3.1\%$ 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 275–297 million music and video files. This total number (275 million files) includes

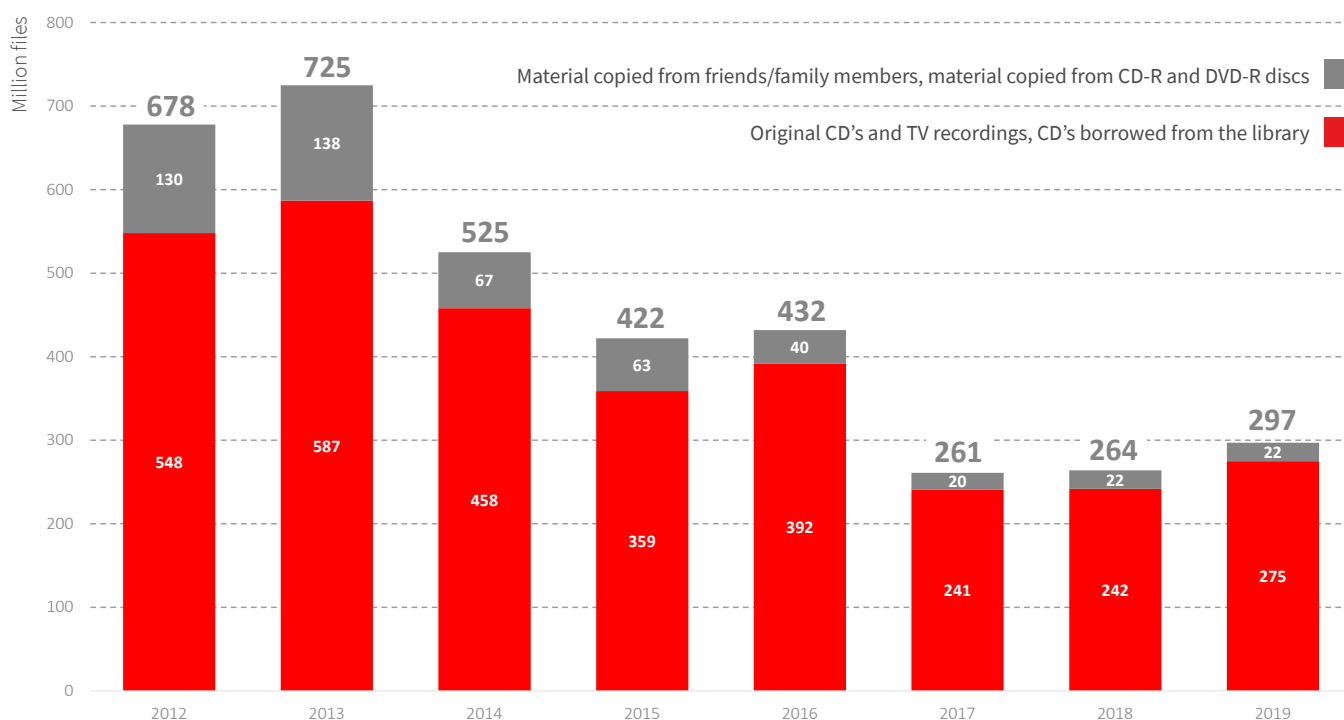
only the legal private copying described in the Copyright Act. For example self-made material, illegal downloading, as well as copies included in the cost of chargeable services, or copies which are otherwise legal have been excluded.

The law also allows copying for friends and family members. On annual basis 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 275 and 297 million copied files (picture 1 and table 1).

The total amount of copying in private households (also including non-remunerated private copying) is approximately 506 million files annually (15–79 year olds).

In the 2018 survey the estimate of the amount of private copying was 242–264 million files (15–49 year olds). The total amount of copying in turn was 418 million.

Private copying 2012–2019



Picture 1. Total amount of private copying in 2012–2019. Taloustutkimus 2019

Music files (pcs)

15–79 years old

	2013	2014	2015	2016	2017	2018	2019
From original CD's	192 631 000	164 090 000	65 688 000	89 474 000	47 680 000	21 532 000	51 018 000
From CD-R, DVD-R, Blu-ray discs	11 912 000	23 187 000	10 459 000	26 683 000	8 030 000	3 611 000	4 556 000
From CD's borrowed from the library	12 355 000	10 936 000	7 429 000	6 034 000	1 302 000	4 255 000	9 053 000
From friends/family members	111 902 000	41 601 000	43 136 000	9 541 000	7 783 000	9 517 000	8 502 000
Total (private copying)	328 800 000	239 814 000	126 712 000	131 732 000	64 795 000	38 915 000	73 129 000

Table 1a. Music. Total amount of private copying by source in 2013–2019. Taloustutkimus 2019.

Video files (pcs)

15–79 years old

	2013	2014	2015	2016	2017	2018	2019
Video files from TV	381 981 000	282 591 000	285 433 000	296 023 000	192 288 000	216 035 000	215 402 000
From friends/family members	13 975 000	2 793 000	9 606 000	3 394 000	4 222 000	9 024 000	8 812 000
Total (private copying)	395 956 000	285 384 000	295 039 000	299 417 000	196 510 000	225 059 000	224 214 000

Table 1b. Video files. Total amount of private copying by source in 2013–2019. Taloustutkimus 2019.

When copying music the most extensively used sources are streaming services (31 %, margin of error ± 4.1 %p.), freely downloadable files from the internet, e.g. artists' own webpages (22 %, margin of error ± 3.6 %p.) and original CD discs (19 %, margin of error ± 3.6 %p). Video files are most often copied from TV (64 % of respondents, margin of error ± 3.3 %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 3.6 million (margin of error ± 1.3 %) have a mobile phone on which music files can be saved and almost 3.3 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/iPod is only used just by slightly over 900 000 Finns (margin of error ± 1.7 %).

Music streaming service Spotify, or some corresponding service is used by almost 2.2 million (margin of error ± 1.8 %) Finns (in 2018 there were fewer than 2 million users).

Internet cloud file storage services (like Dropbox, Google Drive, Apple iCloud etc.) are already used by almost 2.3 million Finns (margin of error ± 1.8 %). Netflix, HBO Nordic, Viaplay or some other monthly charged subscription streaming service is used by 2.1 million Finns (margin of error ± 1.8 %). In 2018 1.9 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 Finns. In 2018 there were already over a million users.

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, 92 % listen to music from radio. Youtube (74 % of Finns) and physical recordings (63 % of Finns) are the next most common ways of consuming music. Youtube is used clearly more than physical recordings for listening music. Of the users of Youtube and streaming services 64 % also listen to physical recordings. The share is clearly smaller than in 2018 (75 %). Live TV broadcasts are watched at least sometimes by 91 % of Finns. Internet TV broadcasts are watched by 73 % of Finns. Watching material saved on recordable set-top boxes has decreased year by year; they are watched by 35 % of 15–79 year old Finns. Of those who use Internet TV, online storage services and VOD streaming services (e.g. Netflix), 91 % also watch TV as live broadcasts. A larger share of the users of the aforementioned services still saves TV content on recordable set-top boxes, than Finns in general. Although the usage of traditional devices has clearly decreased over the past years, they are still used alongside the newer services.

Of those 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 37 % of those who copied music. The shares are somewhat lower than in 2018. Less than a fifth (17 %) of those who copied music would have purchased it as a recording (e.g. CD disc), if the possibility of copying did not exist. More than one tenth (14 %) would have listened to music from a chargeable streaming service (e.g. Spotify) and less than tenth (6 %) would have purchased the music as an audio file. Free streaming service (e.g. Youtube) would have been used by more than one tenth of those who had copied music and 3 % would have borrowed the music from a friend or a library. Free music streaming services are mentioned less often than in the 2018 study.

Of those who had saved video material, more than a third (35 %) 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 7 % would have viewed the audiovisual content from a chargeable streaming service (e.g. Ruutu+, Netflix, Viaplay), 6 % would have bought the material as a recording (e.g. DVD disc) and 5 % would have rented the movie (e.g. Elisa Viihde). The material would have been viewed from a free streaming service (e.g. YLE Arena, Katsomo, Ruutu) by 14 % of those who had copied video material and 3 % of them would have borrowed it from a friend or library,

Those who had copied music files estimate, that they listen to a copied piece of music 65 times on average (41 times in 2018). Those who had copied audiovisual material estimate they view it an average of four times (approx. 3 times in 2018).

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 exclusively from original sources, and the upper end being a figure added with 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.

According to the 2019 study, 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 47 % said they had saved digital graphic 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 46 % of the respondents and graphic material on paper was scanned into digital form by 43 % of the respondents.

Of those who had copied graphic material (book, newspaper article, picture, sheet music etc.) at least sometimes 39 % printed it, 29 % saved it, 16 % photocopied it and 13 % 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 (26 %), invoice/bank statement or such (15 %). The most recent graphic material printed or saved for private use was most often a form (20 %), photograph (17 %), learning material (13 %) or a recipe (11 %).

The publisher of the most recent graphic material printed or saved for private use was most often a private person, e.g. homepage or blog of a private person (19 %), public administration (17 %) or a company (17 %).

Altogether 1.5 billion pages of graphic material have been copied during the past year. Printing digital media on paper was the most used method (over 900 million pages). The next most often used methods were from digital into digital (approximately 450 million pages), photocopying paper on paper (approximately 102 million pages) and scanning from paper into digital (approximately 46 million pages). The number of pages has been classified into non-remunerated, remunerated and partially remunerated according to the type of material copied on the most recent occasion of copying. Based on this classification there were approximately 534–1276 million pages of graphic material covered by remuneration.

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.

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 2018).

The interviews were conducted between 7th March and 16th May 2019. The interviewing work was conducted on different rounds by 45 – 50 interviewers trained by Taloustutkimus. In the first round interviews were conducted at 92 localities, in the second round at 84 localities and in the third round at 87 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 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.

