

Main findings of the 2023 private copying survey

The objective of the survey was to investigate the total volume of legal private copying in Finland.

- According to the study, music that fell under the scope of legal private copying was copied by 137,000 and video material by more than 649,000 15–79-year-old residents in Finland. In total, around 755,000 people in Finland copied either music or video material. This figure is lower than the figure for 2022, when 851,000 people copied either music or videos. Compared to 2015, the number of people making copies has halved (2015: 1.5 million).
- For 2023, the estimate of the total number of private copies (music and video files) is lower than in the 2022 study. However, the number of copies made of music files is higher than in 2022. In contrast, video files were copied in lower numbers than in 2022.
- The overall estimate of the number of music and video files copied legally for private use by people aged 15 to 79 during the year is 188–210 million. The corresponding figure in the 2022 study, 197–213 million, was slightly higher. In the period 2013–2017, the volume of private copying decreased from 725 million to about 260 million copies, and after that (2017–2023) the number of copies has remained between 188 and 297 million.
- Mobile phones and computers are the most common devices onto which music content is copied. The most commonly used platforms for copying video content are online recording services for TV programmes and mobile phones. The use of digital set-top boxes for recording material has decreased significantly. The most commonly used sources for copying music are streaming services (offline saving), freely downloadable files from the internet (e.g. artists' own web pages) and original CDs. Of these, only music copied from original CDs is included in the figures for private copying. For videos, the most commonly used source is TV programmes.
- Three out of five of those who copied music would have acquired the copied material from some other source if copying had not been possible. Two fifths would have paid to acquire the music. A fee-charging streaming service was mentioned as a source more often than in the 2022 study. More than a third of those who copied videos would have acquired the copied material from another source if copying had not been possible. Less than a fifth would have acquired the video material from a fee-charging source.
- Four fifths of the residents in Finland have printed, saved, photocopied or scanned graphic material for private use during the past year. The most frequently used methods of copying are saving and printing, also in terms of the number of pages copied. Photocopied and scanned materials are most often official forms or invoices/bank statements, whereas printed and saved materials are typically photographs, official forms, recipes, educational materials and articles. Materials that are printed or saved are most often published by private individuals (web pages or blogs), a company (e.g. Valio) or public administration. With regard to graphic material, the estimate of the number of pages covered by remuneration for private copying is 554–632 million pages. This estimate is based on Kopiosto's material type classification.

Summary of the results

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

Similar information was last gathered by Taloustutkimus in 2022.

In addition to estimates of the volume of private copying, the survey also provides comprehensive insight into the use of entertainment electronics by residents of Finland, as well as their consumer behaviour regarding music and video content. The study also looked into the harm caused by the copying of music and video material. Furthermore, the study investigated the frequency and total volume of the private copying of graphic material.

The results of the survey conducted by Taloustutkimus Oy are based on a broad sample representative of the population, with more than 3,000 people between the ages of 15 and 79 interviewed in person. Based on the survey, a total of 755,000 (margin of error is $\pm 3.2\%$ at a confidence level of 95%) residents of Finland copy music, movies and

TV programmes for private use.

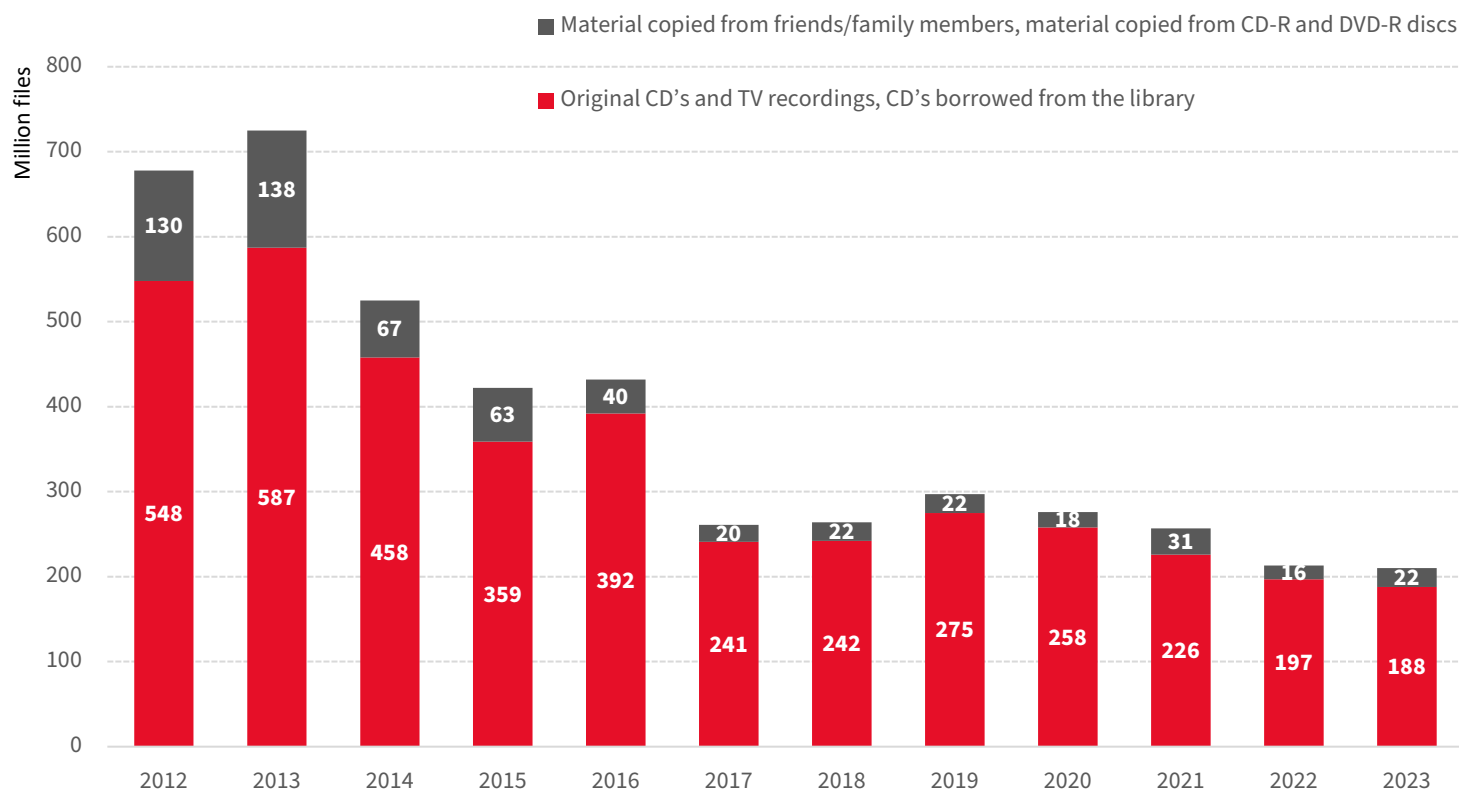
The total volume of annual private copying by people aged 15 to 79 totals about 188–210 million music and video files. This number (188 million files) includes only the legal private copying referred to in the Copyright Act. For example, self-made material, illegal downloads, copies included in the cost of paid services and copies that are otherwise legal have been excluded.

The law also permits copying for friends and family members. Annually, 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 verified as part of the survey, the total volume of private copying is estimated to be between 188 and 210 million copied files (Figure 1 and Table 1). In the 2022 survey, the corresponding estimated figure was 197–213 million files.

Households copy approximately 354 million music and video files per year (including non-remunerated private copying). In 2022, the total volume of copying was about 277 million files.

Private copying in 2012–2023

Figure 1. Total volume of private copying, 2012–2023. Taloustutkimus 2023



Copying of music files (thousand files)

Table 1a. Music Total volume of private copying by source, 2014–2023. Taloustutkimus 2023.

15-79 year olds									
year	2015	2016	2017	2018	2019	2020	2021	2022	2023
Files (pcs)									
From original CD's / CD's borrowed from the library	73 117 000	95 508 000	49 787 000	25 787 000	60 069 000	59 198 000	50 789 000	33 772 000	35 165 000
From CD-R, DVD-R, Bluray discs From friends/ family members	53 595 000	36 224 000	15 813 000	13 128 000	13 058 000	7 852 000	22 738 000	6 986 000	10 767 000
Total private copying	126 712 000	131 732 000	64 795 000	38 915 000	73 129 000	67 050 000	73 527 000	40 758 000	45 932 000

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

Copying of video files (thousand files)

Table 1b. Video files. Total volume of private copying by source, 2014–2023. Taloustutkimus 2023.

15-79 year olds									
year	2015	2016	2017	2018	2019	2020	2021	2022	2023
Files (pcs)									
Video files from TV	285 433 000	296 023 000	192 288 000	216 035 000	215 402 000	199 117 000	174 830 000	163 247 000	152 972 000
From friends/ family members	9 606 000	3 394 000	4 222 000	9 024 000	8 812 000	10 464 000	8 567 000	9 125 000	11 131 000
Total private copying	295 039 000	299 417 000	196 510 000	255 059 000	224 214 000	209 581 000	183 397 000	172 372 000	164 103 000

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

When the respondents last copied music, the most common sources they used were streaming services (38%, margin of error $\pm 4\%$), freely downloadable files from the internet, e.g. artists' own web pages (19%, margin of error $\pm 3.3\%$) and original CDs (15%, margin of error $\pm 2.9\%$). Video files are most often

recordings of TV programmes (49% of respondents, margin of error $\pm 4.1\%$). Mobile phones and computers are the most common devices onto which music content is recorded. The most commonly used platforms for copying video content are online recording services for TV programmes and mobile phones.

More than 4 million 15–79-year-olds (margin of error $\pm 0.99\%$) have a computer or mobile phone in their private use onto which music files can be saved. Almost 3.2 million (margin of error $\pm 1.6\%$) 15–79-year-olds have a USB flash drive. Among this age group, more than 2.5 million (margin of error $\pm 1.8\%$) people have a tablet device. About 672,000 (margin of error $\pm 1.3\%$) people between the ages of 15 and 79 have a separate MP3 player/iPod.

Almost 2.5 million (margin of error $\pm 1.8\%$) 15–79-year-olds use the music streaming service Spotify or another similar service. Internet cloud file storage services (such as Dropbox, Google Drive, Apple iCloud) are used by almost 2.9 million (margin of error $\pm 1.7\%$) 15–79-year-olds.

Roughly 2.6 million people in this age group (margin of error $\pm 1.8\%$) subscribe to Netflix, HBO Max, Elisa Viihde Viaplay or another monthly subscription streaming service.

Online storage services for TV programmes, such as Elisa Viihde, Telia TV with a recording feature, DNA TV or a similar service, are used by more than 1.2 million (margin of error $\pm 1.7\%$) 15–79-year-olds. The figures for music and video services do not constitute the number of customers of these services. A respondent may use a service that another resident of the same household has a subscription to.

As part of the survey, we also investigated the consumer behaviour of residents in Finland with regard to music and video material. While the use of YouTube as a source of music is on the increase, radio was still the most popular way to listen to music among the respondents. Up to 91% of respondents listened to music on the radio (2022: 90%). YouTube is used at least occasionally for listening to music by 81% of 15–79-year-olds, while 57% listen to music from physical recordings. Among the users of YouTube and free or paid music streaming services, the share of those who listen to physical recordings is higher than in the population as a whole (59% of the users of these services also listen to physical recordings).

Live TV broadcasts are watched at least sometimes by 89% of the population, and internet TV broadcasts are watched by 83%. The next most common channel for viewing video content is YouTube. The use of YouTube for viewing video material has increased significantly over the past few years (used by 73% at least occasionally). Set-top box recordings are watched by 23% of 15–79-year-olds. Of those who use internet TV, online storage services and VOD streaming services (e.g. Netflix), 89% also watch TV as live broadcasts. These respondents also watched set-top box recordings slightly more often than television viewers in general.

Of the 15–79-year-olds who copied music, 51% would have acquired the copied material from another source if copying had not been possible. Up to 40% would have acquired the music from a paid source. The share of respondents who listen to music using a paid service is higher than in 2022. Almost a fifth (17%) of the respondents who copied music would have listened to it on a paid streaming service (e.g. Spotify). Up to 14% would have acquired

the music as a CD and 12% would have listened to it on a free streaming service, e.g. YouTube. Fewer than one in ten (8%) would have bought the music as a file. Only 7% would have borrowed it from a friend or a library. A fee-charging music streaming service was mentioned as a source more often than in the 2022 study.

Of the 15–79-year-olds who copied video material, 36% would have acquired the copied material from another source if copying had not been possible. A total of 17% of these respondents would have paid for the video material. Up to 10% would have viewed the audio-visual content on a fee-charging streaming service (e.g. Ruutu+, Netflix, Viaplay), while 5% would have bought a physical recording (e.g. a DVD disc) and 2% would have rented the film (e.g. from Elisa Viihde). Free streaming services (e.g. YLE Areena, Katsomo, Ruutu) would have been used by 15%. Only 4% would have borrowed the material from a friend or a library.

The 15–79-year-olds who had copied music files estimated that they would listen to a copied piece of music 106 times on average (2022: 54 times). Particularly men under the age of 30 gave higher estimated listening occasions than the previous year. The 15–79-year-olds who had copied audio-visual material estimated that they would view it an average of five times (approximately five times in 2022).

What is meant by private copying in the survey?

In this survey, private copying means the copying of music and videos from original sources (original CDs, TV broadcasts, etc.). The aim was to exclude such private copies where the legality of the source is unknown. The law also permits making copies of material owned by friends and family members. Because the interviews could not provide conclusive proof of the origin of the music copied from friends and family members, the estimate of the total volume of copying is presented as a range, with the lower figure including copying from original sources only and the upper 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 copies were not included in the definition of private copying here. In the survey, self-made music, videos filmed by the respondent or other self-made video material, as well as copies of music or video material made for professional use were excluded.

Copying of graphic material

In 2017, the question about the frequency of copying of graphic material covered all copying methods. The following year, each copying method was asked about separately.

In 2023, four out of five (80%) of the 15–79-year-olds have copied some graphic material at least occasionally during the year. Of the respondents, 60% said they had saved digital graphic material in digital format during the past year. Up to 61% had printed graphic

material on paper over the past year. Graphic material on paper was photocopied on paper by 47% of the respondents, and graphic material on paper was scanned by 44% of the respondents. Of those respondents who had copied graphic material (books, newspaper articles, pictures, sheet music, etc.) at least occasionally, 43% saved, 31% printed, 11% photocopied and 11% scanned the material when they last copied such material.

The most recent graphic material photocopied or scanned was typically a form, e.g. an official form (20%), or an invoice/bank statement or such (16%). Forms were mentioned less often than in the 2022 survey. The most recent graphic material printed or saved for private use was typically a photograph (21%), an official form (18%), a recipe (12%), learning material (8%) or an article (8%). Such material was most often published by a private person, e.g. a web page or blog (21%), a company (18%) or public administration (15%). The shares were similar to those of the 2022 survey.

Over the past year, a total of 769 million pages of graphic material was copied by 15–79-year-olds. The most common method of copying was saving digital material in digital format (approximately 472 million pages). The second most commonly used method was making paper copies from digital material (about 209 million pages). The next most frequently used methods were photocopying paper material to paper (about 92 million pages) and scanning paper material (about 41 million pages).

The volume of non-remunerated, remunerated and partially remunerated material copied was estimated on the basis of the most recently copied material. This classification is based on the classification of materials generally used by Kopiosto. Based on this classification, the volume of remunerated graphic material was approximately 554–631 pages (2022: 622–682 million pages).

How was the survey conducted?

The survey was carried out as individual interviews. The target group comprised 15–79-year-old residents in Finland, excluding Åland Islands. Altogether 3,010 people were interviewed.

The sample was created through quota sampling, in which the determining quotas were the national distribution of age and gender and the region and municipality distribution. The sample was weighted to correspond to the target group. The weighted N figures correspond to the Finnish 15–79-year-old population on the level of thousands (Official Statistics of Finland 31 December 2022). The in-person interviews were conducted between 1 February and 30 May 2023. The interviews were conducted by 50 interviewers trained by Taloustutkimus. The respondents came from 165 municipalities.

The analysis was performed with the T test, which tests each social variable in the table to determine whether the difference between the groups exceeds random variation at a confidence interval of 95%. The survey included a calculated estimate of the total volume of files copied per year, using weighted coefficients to represent the population. The estimate was calculated on the basis of the number of copies made by the respondents when they last copied material and a coefficient depicting the respondents' copying frequency.

Copyright Act

The Copyright Act states that everyone has the right to copy published works, for example music, films and TV programmes, for private use. The Act provides for remuneration for private copying, which the state pays to the authors, performers and producers when their works are copied for private use. Private copying and its prevalence are surveyed to enable the correct determination of the remuneration.

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Taloustutkimus Oy is a Finnish full-service market research company established in 1971. Taloustutkimus employs approximately 55 full-time market research professionals and about 200 interviewers in Finland. In addition to its headquarters in Helsinki, Taloustutkimus has regional offices in Tampere and Oulu. The company has foreign subsidiaries and affiliate companies in 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 complies with 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 was certified by SGS Finland.

