

SPRING 2022



INSIGHT

NORDIC PIRACY

Background and scope

PROJECT BACKGROUND

- Insight on illegal film and TV episode downloading and streaming in the Nordics.
 - Focus on reach, quantity (estimated number of titles) is not covered 2022.
- Mediavision has followed piracy usage and attitudes in a pan-Nordic consumer survey since 2010.

SCOPE

- Explore the extent of illegal downloading/streaming of films and (TV) episodes in Denmark, Finland, Norway and Sweden.
- The study also covers the following areas:
 - Awareness blocking of pirate sites, DNS and VPN usage (DK)
 - Local content: TV programs and films (DK, SE)
 - Youtube and piracy (DK, SE)
 - Illegal IPTV (DK, FI, SE)

DATA COLLECTION

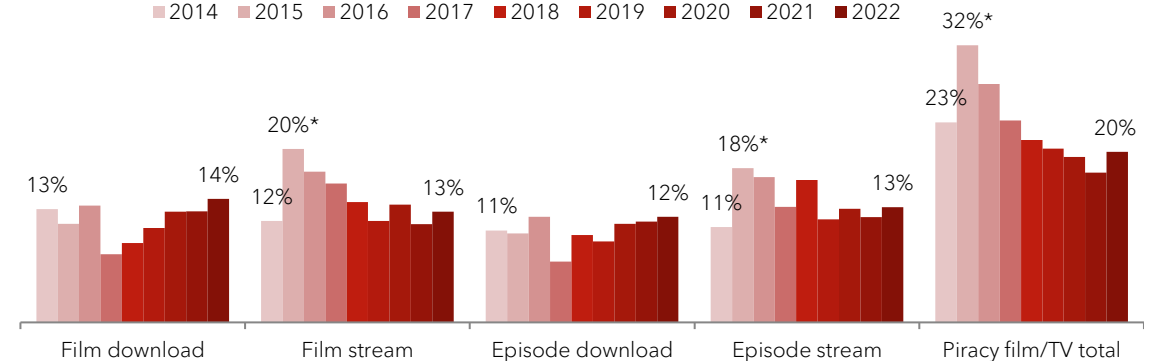
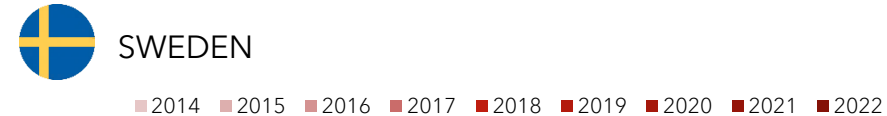
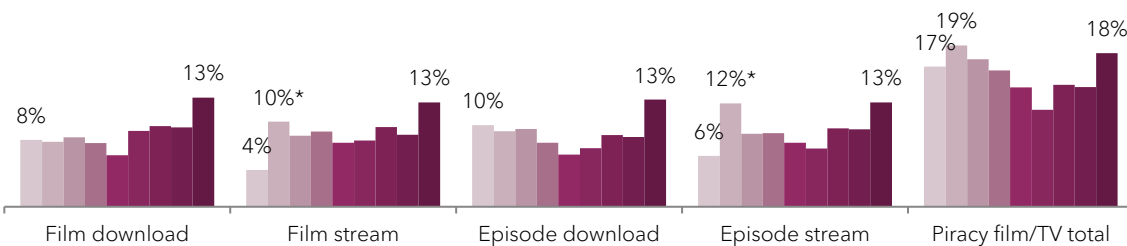
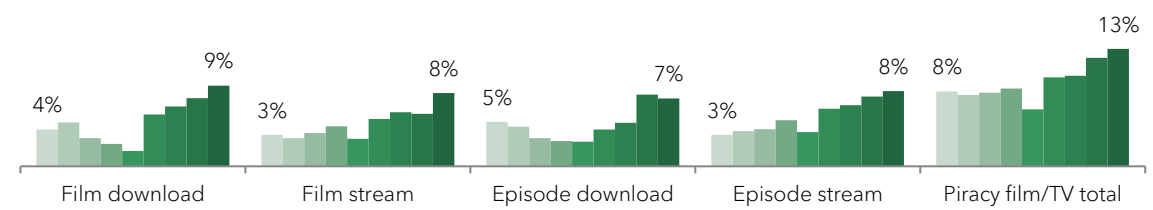
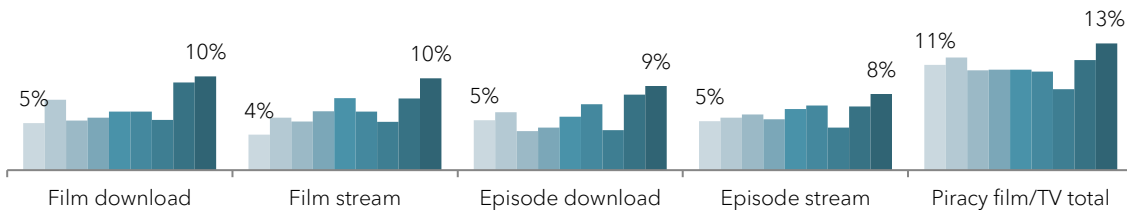
- Online interviews March 2022, results referred to as "Spring 2022" or "2022".
- Number of respondents (15-74 years old) per country: 1400 (DK), 1200 (FI), 1100 (NO), 1000 (SE)
- Monthly reach in Sweden measured over full year except July, with 12 000 online interviews per year (1 000-1 500 per month).

DELIMITATIONS

- Piracy among individuals <15 years not covered.

Piracy still highest in Sweden, but the rest of Nordics closing in

PIRACY MONTHLY REACH, SPRING 2014-2022 (15-74-YEAR-OLDS)



*Significant change compared to previous period, 95% statistical certainty.

Number of respondents, pirates monthly reach spring 2022: Film download: 159 (DK), 129 (FI), 149 (NO), 143 (SE). Film stream: 141, 118, 138, 130. Episode download: 130, 106, 141, 122. Episode stream: 114, 118, 148, 131.

Source: Mediavision

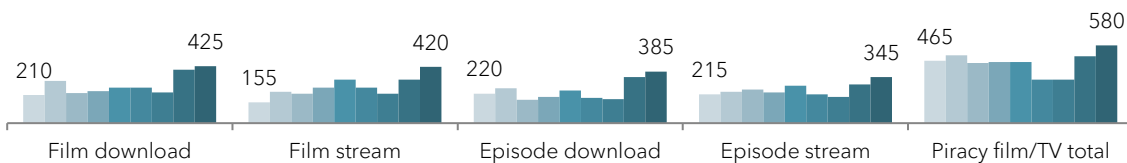
Highest number of pirates in Sweden, almost half of all pirates in Nordics

NUMBER OF PIRATES BY COUNTRY, SPRING 2014-2022 (15-74-YEAR-OLDS)



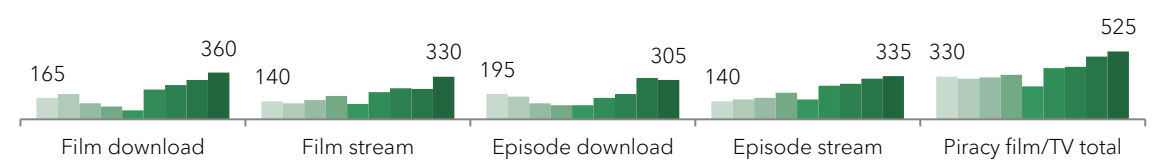
DENMARK

■ 2014 ■ 2015 ■ 2016 ■ 2017 ■ 2018 ■ 2019 ■ 2020 ■ 2021 ■ 2022



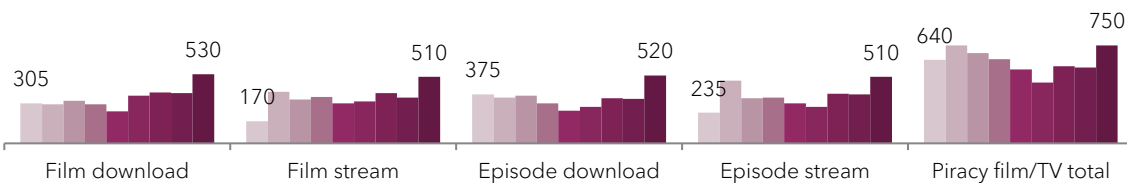
FINLAND

■ 2014 ■ 2015 ■ 2016 ■ 2017 ■ 2018 ■ 2019 ■ 2020 ■ 2021 ■ 2022



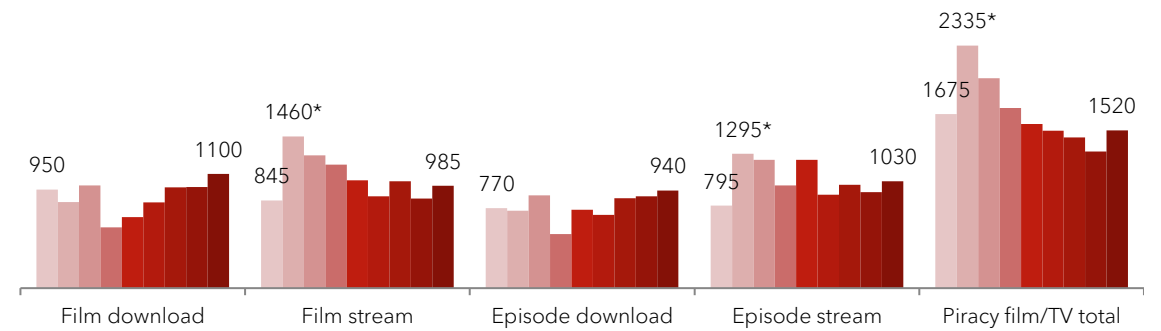
NORWAY

■ 2014 ■ 2015 ■ 2016 ■ 2017 ■ 2018 ■ 2019 ■ 2020 ■ 2021 ■ 2022



SWEDEN

■ 2014 ■ 2015 ■ 2016 ■ 2017 ■ 2018 ■ 2019 ■ 2020 ■ 2021 ■ 2022



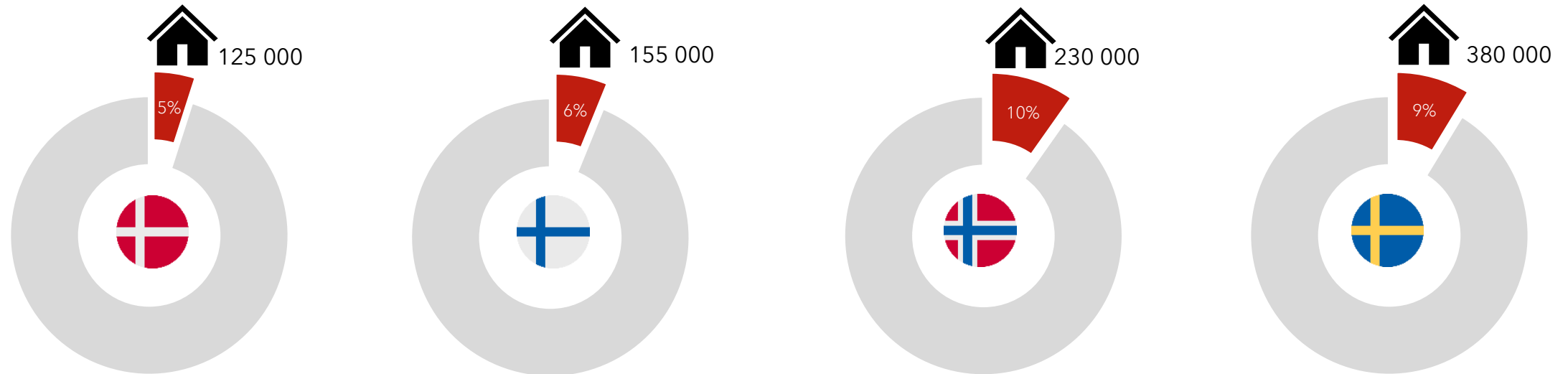
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Source: Mediavision

~0.9 million households with illegal IPTV in the Nordics

ILLEGAL IPTV PENETRATION, HOUSEHOLDS

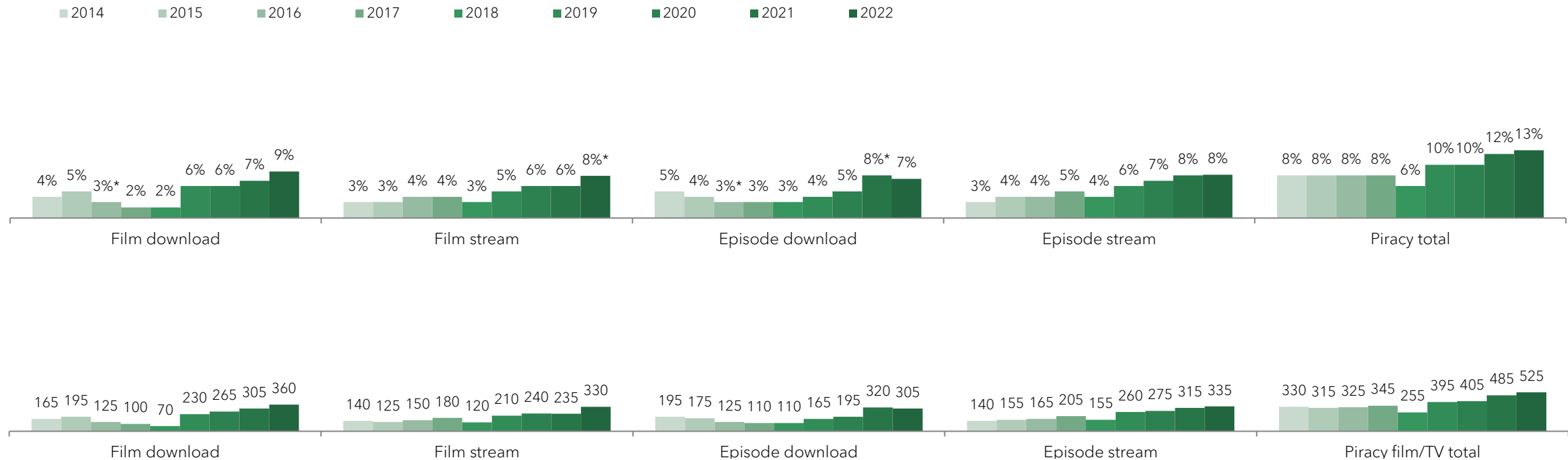


- There are approximately 890 000 households that subscribe to illegal IPTV in the Nordics.
 - Sweden account for more than 40% of these households, and Norway has the highest share (10%).
- Illegal IPTV are paid services that give illegal access to thousands of TV channels and VOD (for example IPTV King and Rapid Swiss TV).



Finland: Piracy now at 13%, equivalent to 0.5 M pirates

SHARE OF PIRATES IN POPULATION 15-74 YRS (MONTHLY REACH)



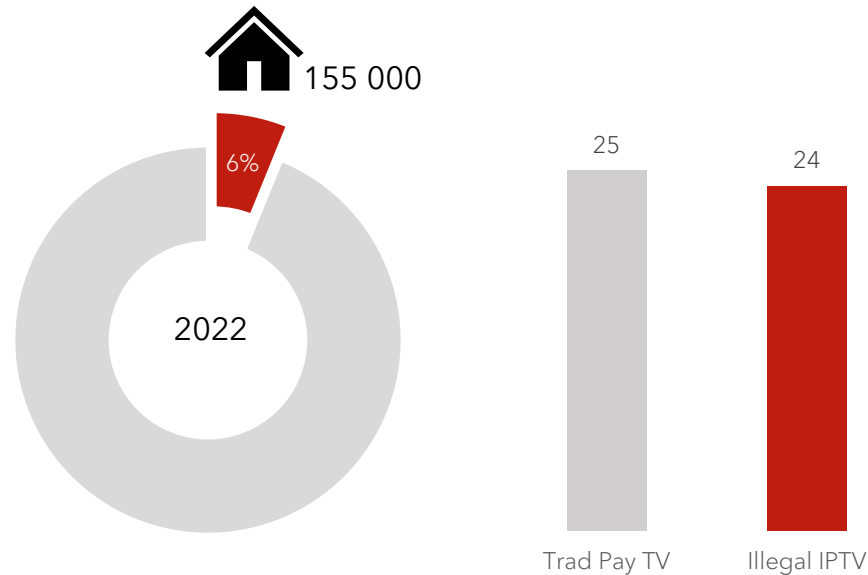
- Piracy in Finland has increased over the past two years, currently at 13%.
 - However, piracy in Finland still lower than in the rest of the Nordics (together with Denmark).
- Now there are approximately 525 000 people 15-74 years in Finland that admit to having downloaded or streamed films and/or TV episodes illegally in the past month.

*Significant change compared to previous period, 95% statistical certainty.
 No of respondents, pirates monthly reach spring 2022 Finland: Film download: 129 Film stream: 118 Episode download: 106 Episode stream: 118
 Source: Mediavision

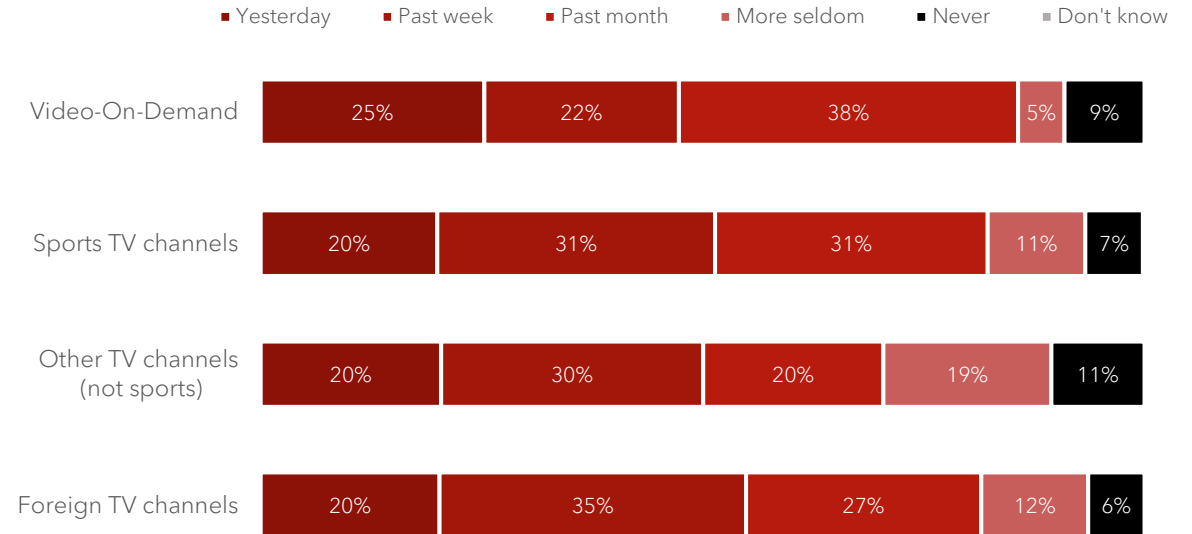


Approx 155 000 households with illegal IPTV

ILLEGAL IPTV PENETRATION AND AVERAGE MONTHLY SPEND (EUR), HOUSEHOLDS



ILLEGAL IPTV USAGE/VIEWING



- There are approximately 155 000 households that subscribe to illegal IPTV in Finland.
 - Average monthly spend on illegal IPTV is 24 EUR/month, which is almost as much as the spend in households with traditional pay TV.
 - Note that content may vary, where illegal IPTV is more likely to carry a wider range of channels and premium content (like sports) than traditional pay TV packages.
 - Traditional pay TV is typically charged on a monthly basis, while Illegal IPTV may be charged per 3/6/9/12 months which possibly affect households' estimated spend.
- Households with Illegal IPTV use these services quite frequently; 25% watch VOD daily and 20% watch various TV channels.
 - Viewing of sports channels is relatively more frequent than in the population in general, likely explained by steep pricing of sports packages for traditional (legal) pay TV.

*Significant change compared to previous period, 95% statistical certainty. No of respondents with illegal IPTV: 58
Source: Mediavision

About the research

DATA COLLECTION

- Online interviews March 2022. Results from this data collection referred to as “Spring 2022” or simply “2022”.
 - Number of respondents (15-74 years old) per country:
 - o Denmark: 1 400, Finland: 1 200, Norway: 1 100, Sweden: 1 000
- Monthly reach in Sweden measured over full year except July, with 12 000 online interviews per year (1 000-1 500 per month).

QUESTIONNAIRE

- The survey covers downloading and illegal streaming (the act of downloading - not actual viewing/consumption of illegally downloaded content).
- Anonymity underlined: Questions on piracy were presented to the respondent together with a text saying that all answer are anonymous.
- Only primary downloads from internet included; distribution of already downloaded content (e.g. files saved to a USB memory stick or CD/DVD) has not been taken into account

REPOONDENTS AND RESULTS

- Results are weighted based on gender, age, geography and household size to produce country representative results.
 - This compensates for variations in response rate between sub-groups.
- All results refer to answers among 15-74-year-olds, if otherwise is not stated. Hence, piracy among individuals <15 years is not covered by this report.
- Historical comparisons of results prior to 2014 has its limitation.
 - Surveys prior to 2013 only covered 15-64-year-olds.
 - In addition, surveys prior to spring 2014 only covered illegal downloads/streaming to computers, and not mobile devices.



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