

SPRING 2023



INSIGHT

NORDIC PIRACY

Background and scope

PROJECT BACKGROUND

- Insight on illegal film and TV episode downloading and streaming in the Nordics.
- 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:
 - Local content: TV programs and films (DK, SE, FI)
 - Youtube and piracy (DK)
 - Illegal IPTV (DK, FI, SE)
 - Consumer value piracy (SE)

DATA COLLECTION

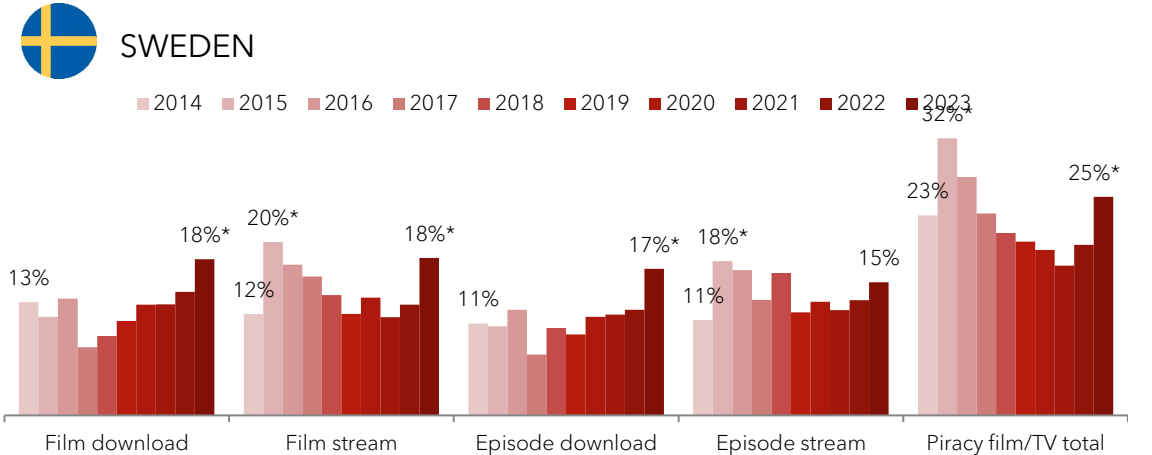
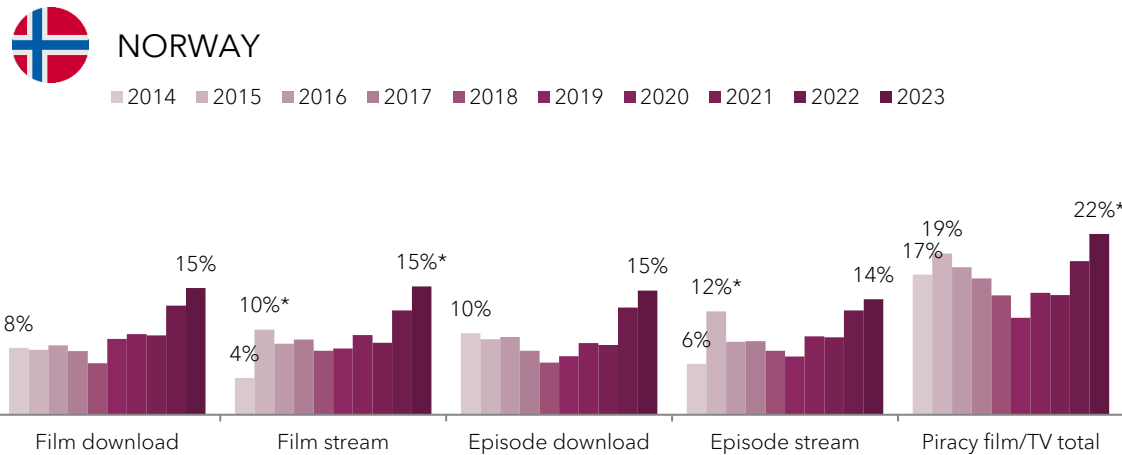
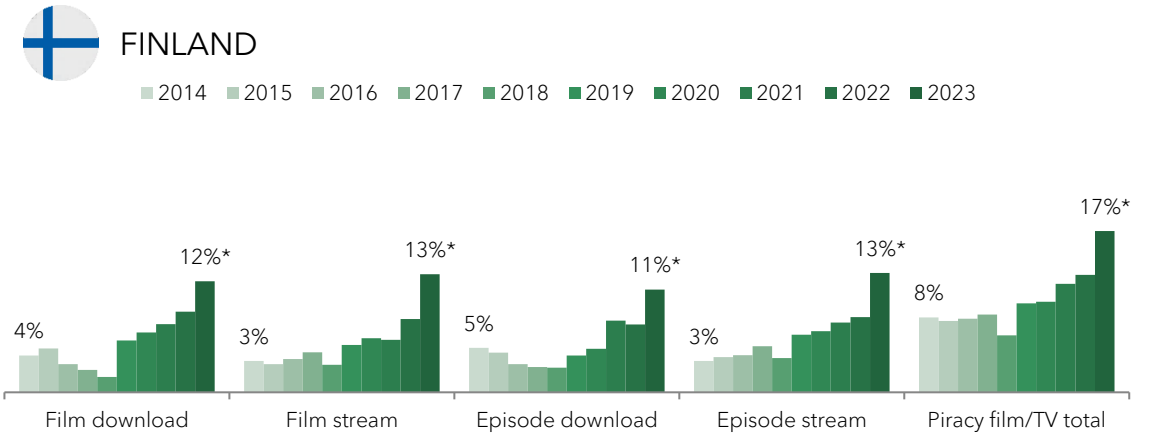
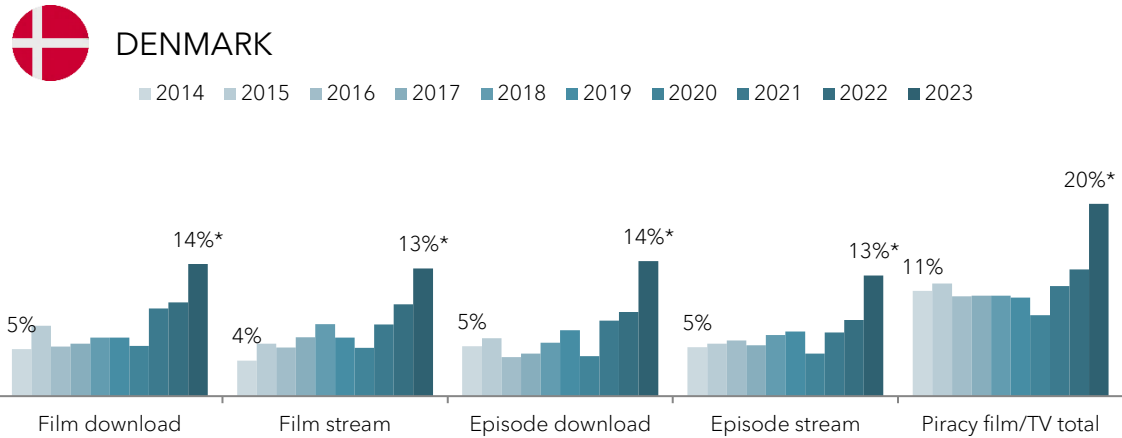
- Online interviews March 2023, results referred to as "Spring 2023" or "2023".
- Number of respondents (15-74 years old) per country: 1400 (DK), 1200 (FI), 1100 (NO), 1000 (SE)
- Monthly reach in Sweden measured over full year except July, with 12 000 online interviews per year (1 000-1 500 per month).

DELIMITATIONS

- Piracy among individuals <15 years not covered.

Increase in all Nordic countries, still highest in SE but others catching up

PIRACY MONTHLY REACH, SPRING 2014-2023 (15-74-YEAR-OLDS)



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

Number of respondents, pirates monthly reach spring 2023: Film download: 174 (DK), 144 (FI), 171 (NO), 168 (SE). Film stream: 166, 153, 172, 171. Episode download: 177, 133, 168, 161. Episode stream: 161, 155, 155, 152.

Source: Mediavision

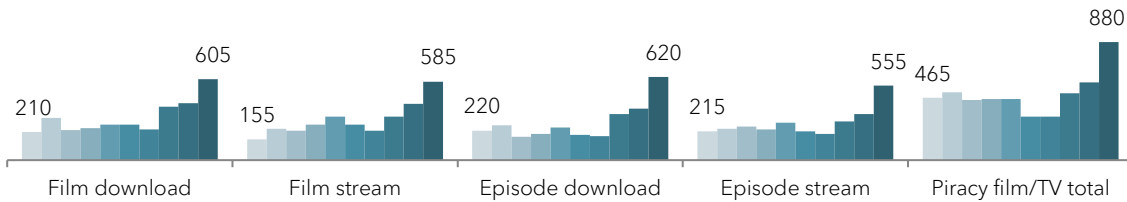
Highest number of pirates in Sweden, almost half of all pirates in Nordics

NUMBER OF PIRATES BY COUNTRY, SPRING 2014-2023 (15-74-YEAR-OLDS)



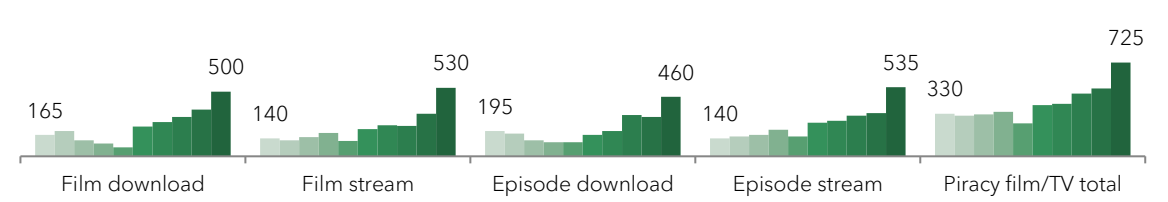
DENMARK

2014 2015 2016 2017 2018 2019 2020 2021 2022 2023



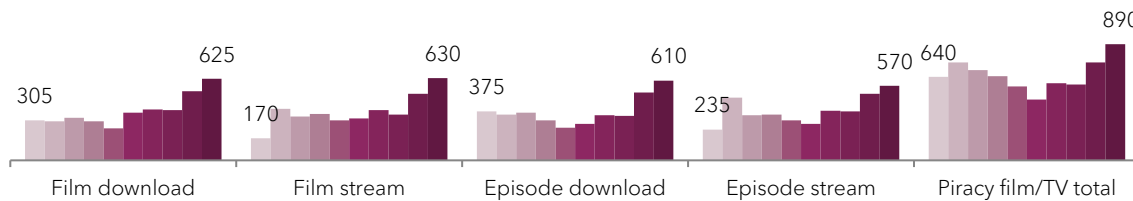
FINLAND

2014 2015 2016 2017 2018 2019 2020 2021 2022 2023



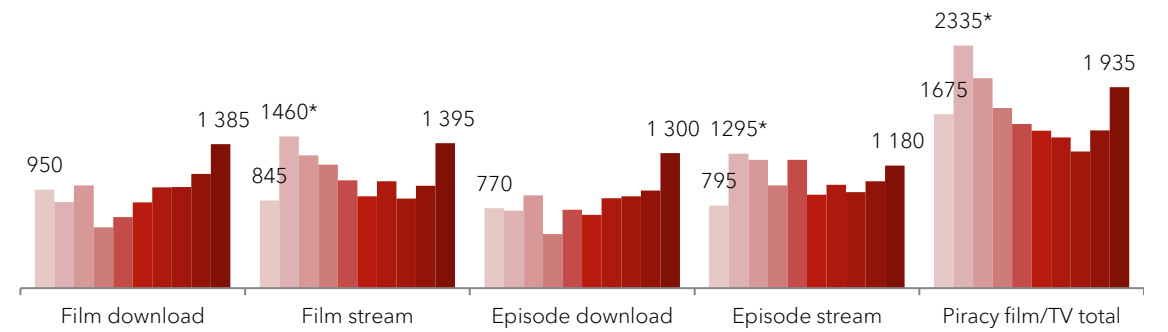
NORWAY

2014 2015 2016 2017 2018 2019 2020 2021 2022 2023



SWEDEN

2014 2015 2016 2017 2018 2019 2020 2021 2022 2023



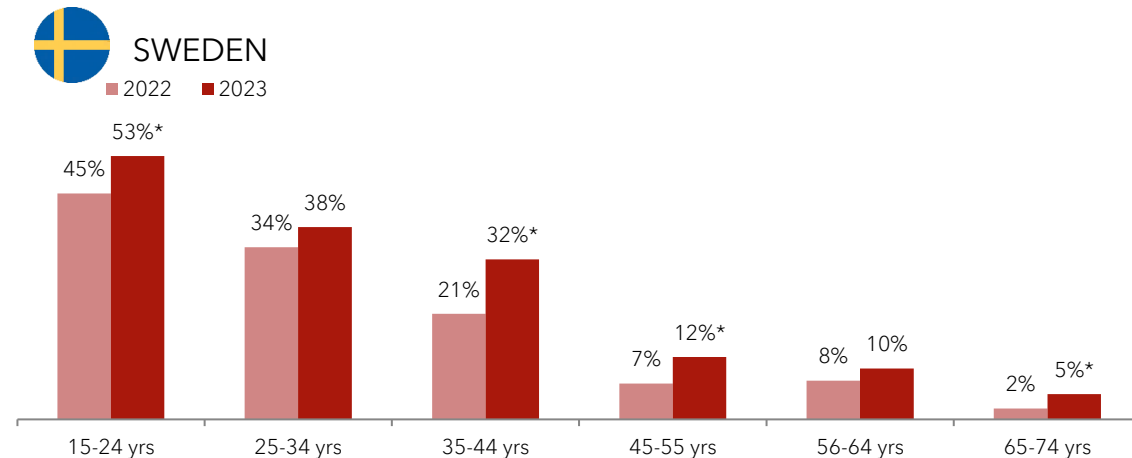
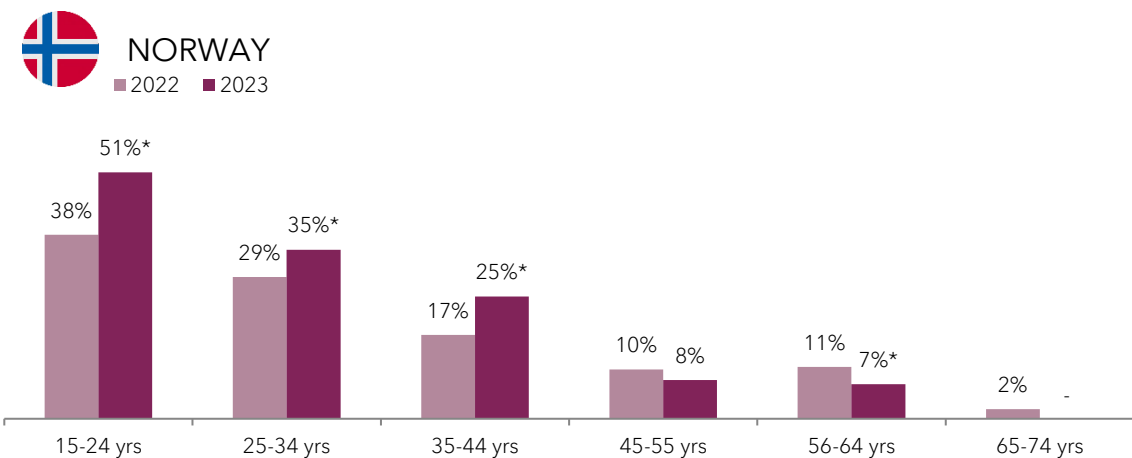
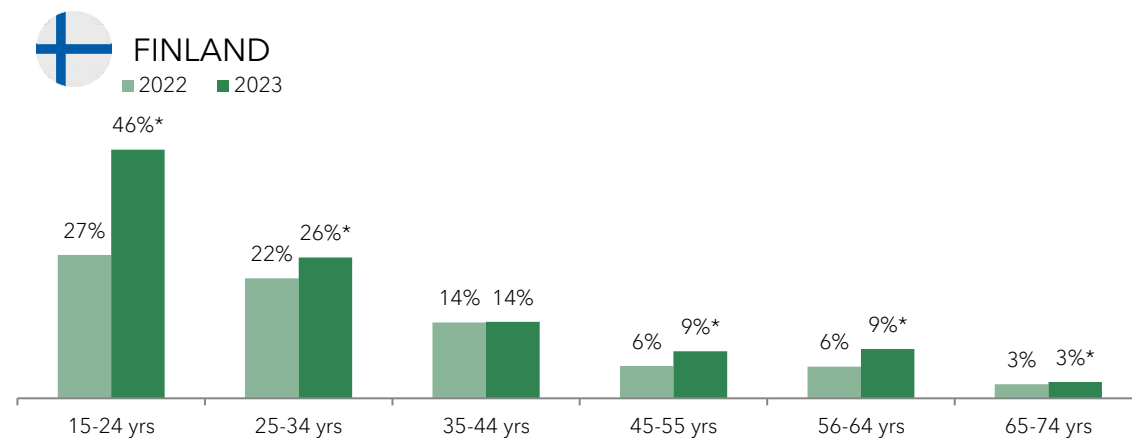
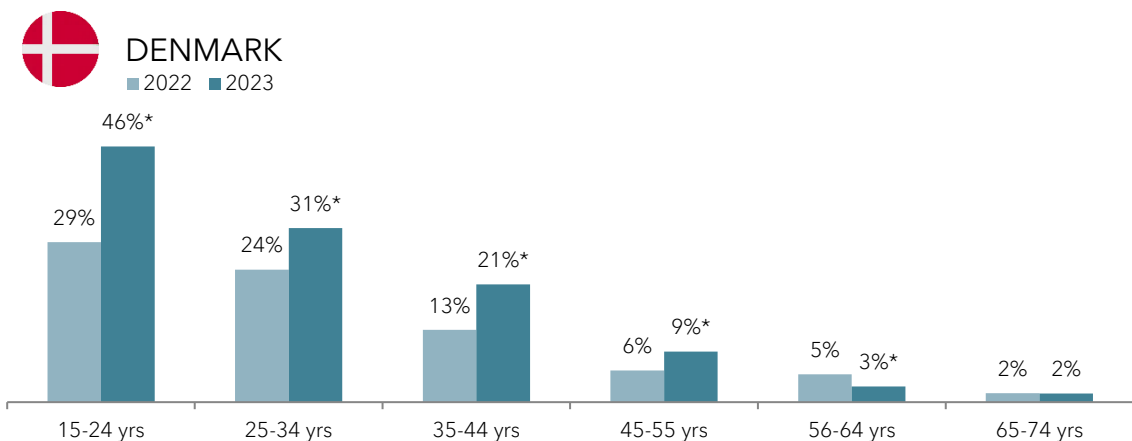
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Source: Mediavision

Increase driven by young demos (15-24 yrs)

PIRACY MONTHLY REACH, SPRING 2023 vs 2022 BY AGE GROUP (15-74-YEAR-OLDS)



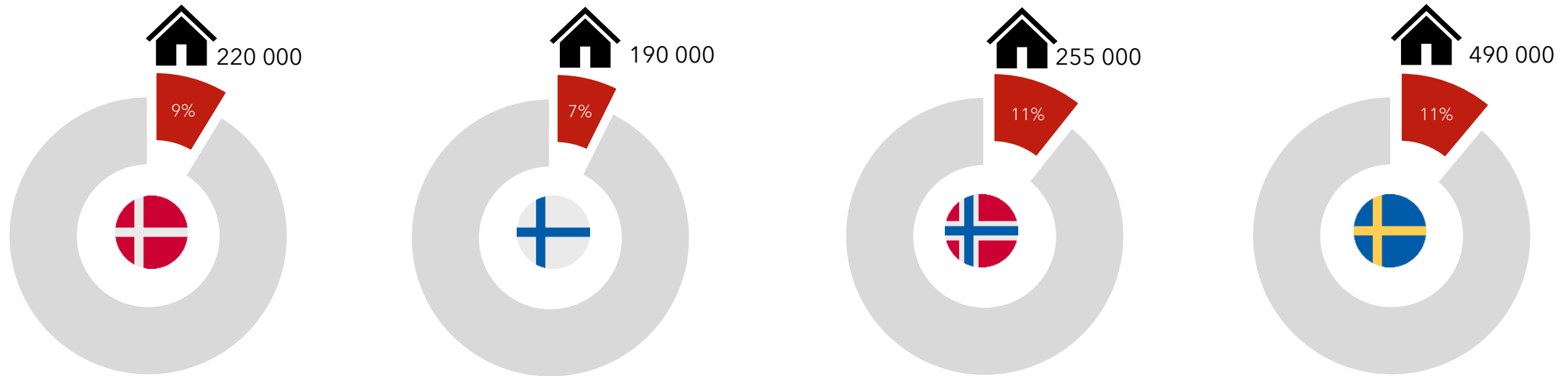
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Source: Mediavision

More than 1.1 million households with illegal IPTV in the Nordics in 2023

ILLEGAL IPTV PENETRATION, HOUSEHOLDS

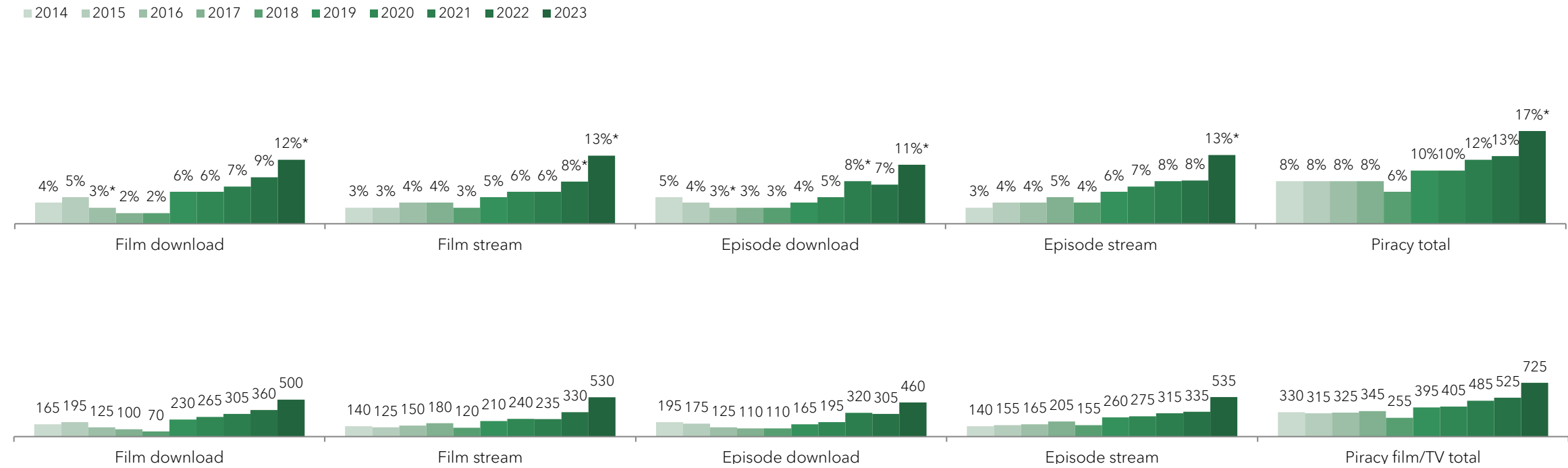


- There are approximately 1 150 000 households that admit that they subscribe to illegal IPTV in the Nordics.
 - Sweden account for more than 40% of these households, and also has the biggest share together with Norway (11%).
- Illegal IPTV are paid services that give illegal access to thousands of TV channels and VOD (for example IPTV King and Rapid Swiss TV).



Finland: Sharp increase for piracy to 17%, surpassing 0.7 M pirates

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

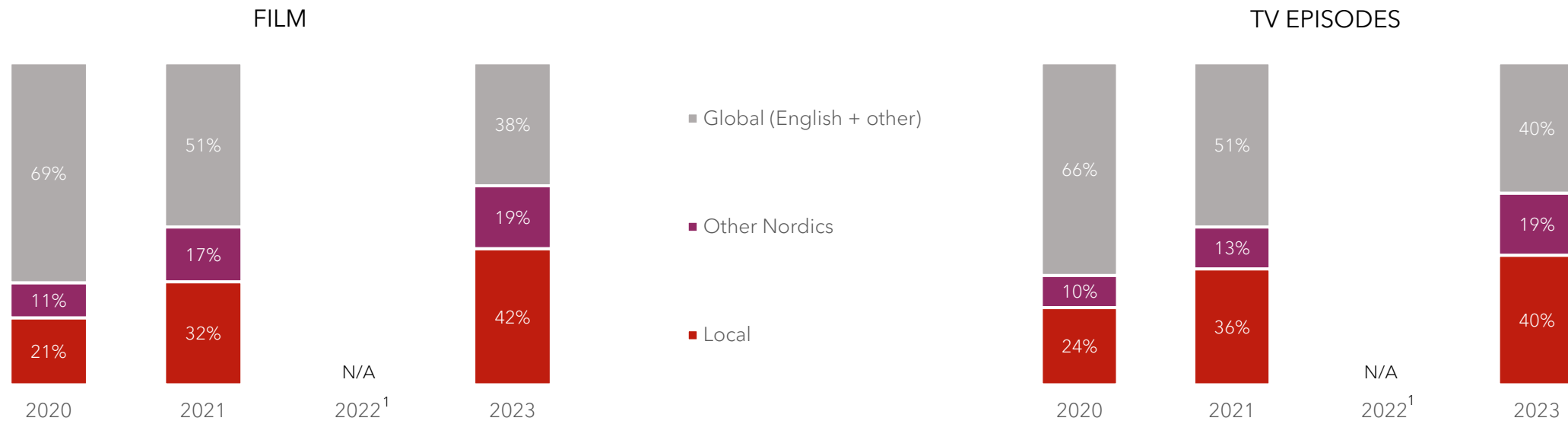


- Piracy in Finland has increased over the past two years, and is currently at 17%.
 - However, piracy in Finland still lowest compared to the rest of the Nordics.
- There are approximately 725 000 people 15-74 years in Finland that admit to having downloaded or streamed films and/or TV episodes illegally in the past month.

*Significant change compared to previous period, 95% statistical certainty.
 No of respondents, pirates monthly reach spring 2023 Finland: Film download: 144 Film stream: 153 Episode download: 133 Episode stream: 155.
 Source: Mediavision

~40% of illegally obtained titles are Finnish and ~20% from other Nordics

COUNTRY OF ORIGIN ILLEGALLY OBTAINED TITLES (STREAMING AND/OR DOWNLOADING)

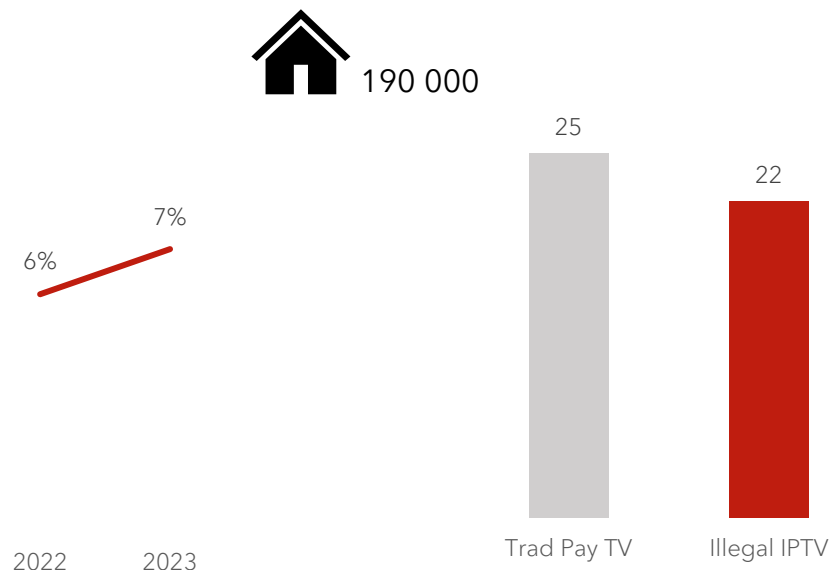


- Approximately 40% of all illegally obtained titles are Finnish, which is about the same as global titles.
 - 19% of the titles are from other Nordic countries.
 - There is little difference in origin between illegally obtained films and TV episodes.
- The number of local titles was not surveyed in Finland in 2022, which is why no data is available for that year.

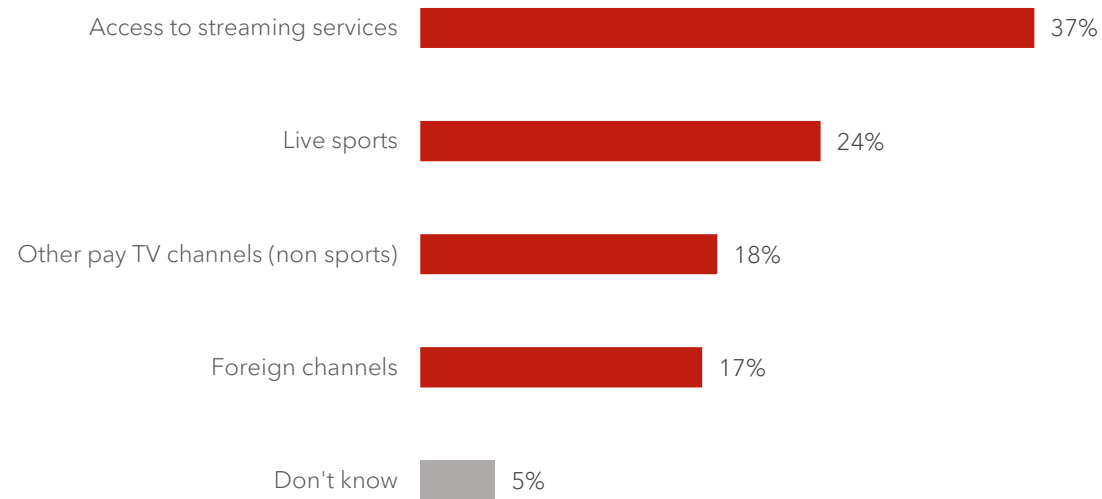


Approx 190 000 households with illegal IPTV

ILLEGAL IPTV PENETRATION AND AVERAGE MONTHLY SPEND¹ (DDK), HOUSEHOLDS



ILLEGAL IPTV: MAIN DRIVER TO PURCHASE, CONTENT



- There are approximately 190 000 households that subscribe to illegal IPTV in Finland.
 - Average monthly spend on illegal IPTV is 22 EUR/month, which is almost as much as the spend in households with traditional pay TV (25 EUR/month).
 - 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.
- Access to streaming services is the main driver to purchase (37%), followed by access to live sports..

¹In households with trad pay TV and Illegal IPTV. *Significant change compared to previous period, 95% statistical certainty. No of respondents with illegal IPTV: 56
Source: Mediasvision

About the research

DATA COLLECTION

- Online interviews March 2023. Results from this data collection referred to as “Spring 2023” or simply “2023”.
 - 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

RECONDENTS 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.

	Denmark	Finland	Norway	Sweden
Number of completes	1408	1203	1114	3035
Incidence rate, %	100%	100%	100%	100%
Response rate, %	27%	36%	19%	29%
Drop out rate, % of respondents	17%	6%	19%	12%

Statistical notes

STATISTICAL SIGNIFICANCE: 95% CONFIDENCE INTERVAL

- Results are based on population samples. One measure of the uncertainty for an estimated proportion (p) is the margin of error. Uncertainty increases closer to 50%, i.e. the margin of error is higher at 50 than 10% (or 90%).
- The uncertainty for an estimate falls with an increasing sample size (n). The margin of error is used to calculate confidence intervals. A 95% confidence interval for an estimate means that the true value in 95 out of 100 cases fits within the interval (the estimate +/- the margin of error). Comments made in the report about statistical significances are based on the use of 95% confidence intervals
- Sample size below 30 is explicitly specified to indicate that the reader has to be aware of statistical uncertainty.

Examples of margins of error (using a 95% confidence interval) for different sample sizes approximately equivalent to some typical groups per country.

Sample	Respondents (n)	p = 50%	p = 30%/70%	p = 10%/90%
Country total (SE)	3000	+/- 1.8%	+/- 1.6%	+/- 1.1%
Country total (DK)	1400	+/- 2.6%	+/- 2.6%	+/- 1.6%
Country total (FI)	1200	+/- 2.8%	+/- 2.6%	+/- 1.7%
Country total (NO)	1100	+/- 3.0%	+/- 2.7%	+/- 1.8%
Sample: 500 respondents	500	+/- 4.4%	+/- 4.0%	+/- 2.6%
Sample : 100 respondents	100	+/- 9.8%	+/- 9.0%	+/- 5.9%
Sample: 50 respondents	50	+/- 13.9%	+/- 12.7%	+/- 8.3%

Background data	Denmark	Finland	Norway	Sweden
Population (000)	5 867	5 550	5 489	10 522
Population 15-74 years old (000)	4 396	4 150	4 105	7 612
Share 15-74 years old in population	74%	75%	75%	72%
Households (000) 15-74 year old	2 522	2 575	2 366	4 402



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