

DOWNLOADING DIGITAL MATERIAL AND PRACTICES IN MEDIA CONSUMPTION

**Research Project of Teosto's Private Copying Unit
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Background

The aim of the research project was to clarify the volume of digital material downloads on various terminal devices and to identify new practices in digital media consumption. In this context, digital media refers to music and still and moving images, in particular, but also to texts, spreadsheets and other documents created with a computer or an equivalent portable device: mobile phones and external hard disks equipped with a storage capacity (fixed memory or memory/slot for memory card) and MP3 players. The material for the study was collected through two online surveys and two preliminary focus group interviews in the summer of 2007.

Sampling and research methods

The sampling and interviewees for the surveys were selected so as to obtain as much new information as possible on new socially significant uses of media devices. Two Web-based surveys were carried out. Through the IRC Gallery web community, a random sample was collected of young digital consumers, who download music or moving images. Further, with the help of the Digium research institution's online panel, a survey of users of mobile phones or external hard disks equipped with music playing features was carried out. A total of slightly over one thousand respondents participated in each of the two surveys.

The first survey, charting the downloading of music or moving images, was performed in the IRC Gallery (<http://irc-galleria.net>) online community. The respondents were all young, between 12-25 years, representative of the user base of the service. The IRC Gallery is the most popular youth media in Finland, the largest web media in the Nordic countries and one of the largest in Europe. This web service is visited by approximately 830,000 users each week, of whom circa 415,000 are registered users. The popularity of the service is also evident through the 2.2 billion downloads conducted per month through the service. More than 60 per cent of 13-18 year olds and about 30 per cent of 19-24-year-old Finnish youths have registered with the service. The IRC Gallery respondents were fairly extensively representative of youths living in different parts of Finland.

The participants in the second survey, a user study of music-playing mobile phones and external hard disks, performed with the help of Digium's panel, represented a vaster age range. The Digium panel (<http://www.digium.fi>) was established in 1999, and the members of the panel were recruited from respondents to national surveys. The major recruitment channels were user profile surveys arranged via public network services (visitors of ca 70 different municipal and city websites and the websites of approximately 200 companies in various industries).

From among the 5,000 panel members, the sample for this second survey included users of mobile phones and external hard drives equipped with storage capacity (fixed memory/slot for memory card) and MP3 players. Respondents recruited through Digium are representative of Finns who own this type of equipment. The largest group of the Digium respondents were 26-30 year-olds (a fifth of the respondents), but 25 per cent of them were over 40 years old, including a number of respondents that were over 60 years

old.

In both surveys, the gender division was similar: of the respondents in both surveys, slightly more than half were women (57 per cent in the equipment survey and 58 per cent in the IRC Gallery recording survey).

The purpose of the initial focus group interviews, conducted prior to conducting the surveys, was to test the survey design and highlight any surprising perspectives.

1. IRC Gallery's downloading and user survey

With the survey conducted in the IRC Gallery, we were looking for young people who could be considered forerunners, or lead users, regarding digital downloading practices.

Respondents want to use digital entertainment contents flexibly in various devices

Downloading digital entertainment content is a multi-format phenomenon, in which users flexibly save the same content in various places, depending on the situation. This is especially the case regarding music. 70 per cent of the respondents had downloaded the same music content on various devices and storage platforms. The general explanation for saving the music on multiple devices was the desire to use the music flexibly, regardless of place.

Copying for friends is common

The survey results confirm that copying for friends and family members, which is permitted under copyright law, is common. Of the respondents, 78 per cent had copied music for friends or family members, while 57 per cent had copied movies or TV programmes.

Copy protection does not reduce private copying

Of the respondents, 37 per cent had bought music in digital file format. As many as 89 per cent of the respondents had purchased movies or TV programmes, e.g. DVDs. Of those who had bought music in file format, 86 per cent said that copy protection had no impact on their use of the music or that they were unable to say what impact it had. The equivalent figure for those who had purchased movies or TV programmes was 88 per cent. Regarding music, 15 per cent said that copy protection had had an impact on their use of music, while 12 per cent of the respondents who had purchased moving pictures said that copy protection had an impact on their use of the material.

In the main, the respondents found copy protection annoying: "you cannot change format", "it gets jammed", "it did not work", "some discs cannot be copied", "I try to avoid protected music and always buy it unprotected, if possible", "a bit more difficult to copy onto your computer", "the purchased disc did not work in my DVD player", "only an annoyance to consumers, the protection is broken anyway", "copy protected DVDs do not work on my expensive DVD player".

Computers, MP3 players and mobile phones are the most popular devices for listening to and downloading music.

Nearly all respondents listen to music daily. 96 per cent of the respondents listen to music on a computer, two out of three as often as on a daily basis. 77 per cent of the respondents listen to music on an MP3 player, of whom 53 per cent listen daily. 42 per cent of the respondents listen to music on their mobile

phone. 74 per cent of those listening to music on their mobile phone report doing so daily or several times a week.

Listening to music on a mobile phone is divided between listening to music downloaded on the phone or on a memory card, and listening to the radio, as follows: 70 per cent listen to music saved on the phone, 10 per cent to music on the radio and 20 per cent to both recorded music and the radio.

Computers, MP3 players and mobile phones are the types of devices owned by youths, on which music is most frequently downloaded and with which music is listened to. Only one in every seven respondents listen to music occasionally or more often on a portable CD player.

Of the IRC Gallery respondents, approximately half (46 per cent) reported that they save music at least, or more often than, a few times a week. Of all music downloads, more than half are saved on a computer, as well as on a portable MP3 player. Every fourth download is also saved on a mobile phone. The survey indicates that gender differences between downloading practices are minor.

The computer is the entertainment centre of the home

One of the key findings of the survey was that downloading is often done on more than one target at a time. Downloads are chiefly performed on a computer, which can be viewed as the respondents' digital content warehouse. From there, according to need, content is repeatedly transferred to mobile devices with smaller capacities, such as mobile phones and MP3 players equipped with a saving capacity (fixed memory or memory/slot for memory card). On the other hand, it is also noteworthy that a computer is not simply a warehouse, but also a much-used device for listening to music and viewing moving pictures.

Parents underestimate the amount of content on home computers

When trying to estimate how computer hard disk space is distributed among different types of media content, it seems that parents are not always able to provide a realistic evaluation of the amount of music downloaded to the home computer(s). This is the case in particular in families where the children are actively downloading music. The median of songs downloaded to a computer among the 2007 IRC Gallery respondents was ca. 970 songs, and the average number of songs on the computers was 1,750. Comparing these results to a previous survey conducted by the Private Copying Unit in 2006, where mainly parents were surveyed – and taking into account knowledge of how computers are divided between various households - it is clear that adults and young people in the same family provide different responses to questions concerning the amount of content on the family computer. In reality, many home computers contain a significantly larger amount of protected material than the parent of the family has estimated.

Music usually originates from the Internet

Music content on computers, mobiles and portable devices usually originated from the Internet (54 per cent) or from an original, published CD/DVD (27 per cent). However, considerably more music is downloaded from the Internet onto computers than onto mobile MP3 players or mobile phones. Two thirds of the music downloaded onto computers originates from the Internet, while the equivalent figure for MP3 players and mobile phones is about 50 per cent.

Copying music onto mobile devices is common

The number of downloads onto various platforms is high. Among the users of the devices, an average of

315 songs are saved on CDs, 400 on DVDs, 1,750 on computers and 1,520 on external hard drives, 250 on MP3 players and 90 on mobile phones.

Nearly half of the respondents reported that they download movies or other video material at least a few times per month. Every tenth respondent downloads moving pictures on a daily basis. 16 per cent of downloads are performed on video tape, while more than every second download is onto a computer's or external hard drive.

2. The device survey for Digium panel members

The device survey for the Digium research centre panel members consisted of 1,112 respondents, of whom 832 said that they own a mobile phone equipped with music playing functionality (MP3 player and memory/slot for memory card). Of these phones, 238 were mobile phones marketed as music or multi media phones, with very high-quality music features. 626 of the total number of respondents owned an external hard drive.

Mobile phones and external hard drives contain protected material

One third of the respondents download material to their mobile phone and three out of five to an external hard drive once a week or more often.

The respondents were asked to evaluate the number of downloaded items of music on the above-mentioned devices. The estimated number of songs downloaded by people owning a multimedia phone was, on average, 80, and the median, i.e. the middle value in the data range, 10. The average for owners of other types of mobile phone was 45 and the median 6 songs.

Of video content on mobile phones, 68 per cent was home-made, as was 5 per cent of music on mobile phones. On external hard drives, the share of home-made material of video content was 25 per cent, while that of home-made music was 8 per cent of all music content.

One third of owners of multimedia telephones also had one to five downloaded video files and one fifth had six or more downloaded video files on their mobile. The number of video files downloaded by owners of other types of mobile phone was only slightly lower.

The equivalent estimates of those owning an external hard drive, of the number of songs downloaded to an external hard drive, was 2,000 on average, with a median of 50. Three out of five owners of an external hard drive had saved video content on an external hard drive, two out of five six or more files, and every eighth more than 50 files.

In comparison, we can note that among the IRC Gallery respondents, the average of downloaded music items among those using an external hard drive (308 respondents) was 1,520. The median in this group was 100. Similarly, of those IRC Gallery respondents (n=142) who used an external hard drive for downloading movies and TV programmes, more than 20 per cent had more than 50 movies or TV programmes downloaded to their hard drive.

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