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| <b>Institution:</b> University of Hertfordshire                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| <b>Unit of Assessment:</b> Panel D (35): Music, Drama, Dance and Performing Arts                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>Title of case study:</b> Music Experience and Behaviour in Young People                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| <p><b>1. Summary of the impact</b> (indicative maximum 100 words)</p> <p>Research conducted 2008–11 by the university’s Music and Entertainment Industries Research Group on the online music consumption habits of British 14–24 year olds has influenced national and international music industry stakeholders and legislative bodies. First, the findings helped industry body UK Music to inform its influential music industry membership’s knowledge and understanding of copyright issues and changing music spending patterns. They also inspired a ‘Proposal’, written by the Songwriters Association of Canada and widely read in north America, urging industry-wide adaptation to changing music listening preferences. Further, the work has contributed to pre-legislative copyright debate and policy making in Britain and overseas.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| <p><b>2. Underpinning research</b> (indicative maximum 500 words)</p> <p>In 2008 and 2009, UK Music, the umbrella body that represents the collective interests of the entire UK music industry, commissioned the University of Hertfordshire’s Music and Entertainment Industries Research Group (MEIRG) to research and report on the online music consumption habits of 14–24 year-olds in the UK. UK Music made this commission based on MEIRG’s academic profile, and because the university’s undergraduate degree programme in Music and Entertainment Industry Management (MEIM) is recognised by industry as the leading programme of its kind in the UK. A third national survey, not commissioned by UK Music, took place in 2011.</p> <p>The findings of all three research projects were based on a large-scale survey of approximately 1,800 UK respondents, which included a representative mix of ages, and a roughly 50/50 gender split, within the target demographic. The survey’s respondents were sourced via YouGov, youth groups, secondary schools and universities across the UK, as well as through media and social networks, and music partners. David Bahanovich (Reader) and Dennis Collopy (Senior Lecturer) co-directed the research project, which included concept generation, survey question design, marketing and online implementation, along with data analysis and writing the final reports. They generated the questions in collaboration with UK Music, enlisting the university’s 120 MEIM students as a focus group to test and refine the final questions used in the survey. Robust statistical analysis of the respondents’ answers was carried out by Lindsey Kevan of the university’s Statistical Services and Consultancy Unit.</p> <p>The results provided a penetrating insight into how 14–24 year-olds accessed, consumed and shared music during the 2008–11 period. The findings shed light on key issues confronting the music industry, chiefly revealing that music was the most popular form of entertainment, that ownership both online and offline was hugely important to the target group, and that there was a significant value gap in terms of the popularity of music and the amount of money spent on it, especially when compared to other entertainment types. Free file-sharing was widespread, yet 85 per cent of those who accessed music illegally said they would be interested in paying for an unlimited download service. Eighty-seven per cent said that copying between devices was important to them; 86 per cent of respondents had copied a CD for a friend; 75 per cent had sent music by email, Bluetooth, Skype or MSN; 57 per cent had copied a friend’s entire music collection; 39 per cent had downloaded music from an online storage site; and 38 per cent had ripped a TV, radio or Internet stream. The main entertainment hub was the computer: 68 per cent of respondents used it every day to listen to music. The popularity of peer-to-peer file sharing remained unchanged between 2008 and 2011, with 61 per cent stating that they downloaded music using peer-to-peer networks or torrent trackers. Of this group, 83 per cent did this on a weekly or daily basis.</p> <p>This was the first major piece of targeted academic research in this fast-changing area of interest:</p> |

previously, the British music industry and government had relied on reports from commercial organisations. The first report's findings were delivered before the House of Commons in June 2008 (discussed in section 4), while the 2011 national survey's findings (published 2012) were released in June 2012 at the University of Music and Performing Arts, Vienna.

### 3. References to the research (indicative maximum of six references)

D. Bahanovich and D. Collopy (and C. Koester, 2009 report), 'Music Experience and Behaviour in Young People', National Survey Research Report, originally commissioned by UK Music, 2008 (1st report); 2009 (2nd report); 2012 (3rd report).

– The 2009 report is available online at:

<[www.ukmusic.org/research/music-consumption-in-14-to-24-year-olds](http://www.ukmusic.org/research/music-consumption-in-14-to-24-year-olds)>

– The 2008 and 2012 reports are available on request

### 4. Details of the impact (indicative maximum 750 words)

#### Music Industry: National

The findings of the 2008 study, which were reported in over 250 global news sources, provided invaluable quantitative data for stakeholders in the £3.9 billion British music industry. They informed an ongoing intellectual property and copyright debate as the industry attempted to adjust to unprecedented changes in music recording, sales and purchasing.

The most immediate impact lay in plugging significant information gaps. UK Music, which supports the music industry through policy and research, commissioned the work on behalf of its constituent members, who are: the Performing Rights Society for Music (PRS), Phonographic Performance Limited (PPL), British Phonographic Industry (BPI), British Academy of Songwriters, Composers and Authors (BASCA), Music Publishers Association (MPA), Music Producers Guild (MPG), Music Managers Forum (MMF), Musicians Union (MU), and the Association of Independent Music (AIM). These nine organisations, which are the engines of the UK music industry, engage with government in crafting policy on intellectual property, copyright infringement and other important legislative areas for industry growth. As each organisation is represented on UK Music's Research Steering Group, the entire membership was closely involved in ensuring that the work would serve their interests and needs. They also discussed and analysed the data, and its implications for business decisions, policy and education.

The research informed UK Music's position on policy issues and the design of copyright education resources, in turn informing its members' business development and licensing teams. UK Music's policy advisers were particularly interested in the changing spending patterns identified by the report, and its senior policy advisor summed up the value of the findings to the organisation:

The research involved the largest study to date of the attitudes and practices of a very important age group in the UK, at a very crucial time in the development of the market – and it was a very useful as well as an innovative and illuminating piece of research. We used it. That's about as much as you could ask for in research.

#### Music Industry: International

The first report was widely read by the major international record labels, especially Universal Music (the largest music company in the world), which circulated the research internally.

One example of its influence on an overseas music industry organisation is the Songwriters Association of Canada (SAC), whose president was particularly interested in the findings' implications for adapting to changing listening preferences. He has stated that he was greatly influenced by the 'tremendous impact' of Hertfordshire's 'groundbreaking work', which inspired the SAC's own region-specific investigation of piracy. Funded by the Ontario government and conducted across all of Canada by Montreal-based research group CROP, the findings were well

publicised in the USA in particular.

'The Hertfordshire Study' is prominently cited in the SAC's 'Proposal' – its discussion, advocacy and lobbying document – which, according to the organisation's website, has attracted 'unprecedented interest'. The Proposal's summary opens with an uncompromising proposition whose origins clearly lie in Bahanovic and Collopy's findings:

Rather than continuing to engage in increasingly futile efforts to stop people from using new technologies to share music, we . . . believe this massive use of creators' work should be licensed just as live performances and broadcasting, also initially considered infringement, were ultimately licensed in the past.

### **Informing Legislators**

#### ***Nationally***

UK Music incorporated the research findings into its submissions to government on legislative and policy matters. In June 2008, for example, it presented the research at a meeting of the All-Party Parliamentary Group on Music. According to UK Music's senior policy advisor, 'the meeting was very enlightening and invigorating' and the new data was 'very valuable to Parliamentarians'.

Indirect impact on government debate and policy making occurred via UK Music's current and former chief executives, who often provide evidence to various select committees; and through the organisation's policy recommendations, which are regularly cited in Commons and Lords debates. The organisation meets officials, MPs, advisers and ministers to discuss policy issues affecting the music industry, and uses the Hertfordshire findings in its numerous responses to consultations on copyright exemption for private copying.

The 2008 report was quoted in a Department for Business, Enterprise and Regulatory Reform consultation on peer-to-peer file sharing (2008), and in the Digital Britain Report (2009), a significant government policy document that detailed a strategic plan to secure Britain's place in the vanguard of the global digital economy. Copyright was a central issue, and Action 11 read: 'The University of Hertfordshire research into attitudes towards music and copyright by young people showed that only 10% of those surveyed are currently deterred from file-sharing by a fear of being caught. The current approach to civil enforcement is not working as well as it needs to.'

As the Digital Economy Act (2010) was one outcome of this report, MEIRG's research therefore contributed to the government's decision to introduce legislation to reduce unlawful file-sharing. The research was further cited in the Strategic Advisory Board for Intellectual Property Policy's report 'Copycats? Digital Consumers in the Online Age' (2009), which examined the implications of digital consumer behaviour and attitudes for intellectual property policy.

#### ***Internationally***

The research findings were included in the World Intellectual Property Organisation's 2010 report on music, film, and software piracy in developing economies, and a subsequent independent, multi-country report published in 2011. The European Parliament also cited the work in connection with Directive 2004/48/EC (enforcement of Intellectual Property Rights in member states). Policy and law makers internationally therefore used the Hertfordshire research to inform their decisions and recommendations on intellectual property and copyright infringement.

### **5. Sources to corroborate the impact** (indicative maximum of 10 references)

#### **Music Industry**

##### ***Advocacy Document***

'Proposal', Songwriters Association of Canada: <<http://songwriters.ca/proposal/detailed.aspx>>

A 'Summary' of the Proposal is available at: <<http://www.songwriters.ca/proposal/summary.aspx>>

### **Music Industry: Organisational Corroboration**

Two individuals have agreed to corroborate information about the use of the research findings within and beyond their organisations; contact details have been provided separately.

### **Government: Selected Reports, Policy and Discussion Documents**

#### **National**

Department for Business, Enterprise and Regulatory Reform, 'Consultation on Legislative Options to Address Illicit Peer to Peer (P2P) File Sharing' (July 2008), p. 12.

[webarchive.nationalarchives.gov.uk/20080726153746/http://www.berr.gov.uk/files/file47139.pdf](http://webarchive.nationalarchives.gov.uk/20080726153746/http://www.berr.gov.uk/files/file47139.pdf)

Department for Business, Innovation and Skills, 'The Digital Britain Report' (2009), pp. 42.

[www.official-documents.gov.uk/document/cm76/7650/7650.pdf](http://www.official-documents.gov.uk/document/cm76/7650/7650.pdf)

Intellectual Property Office, 'Consultation on Copyright', (2011), p. 62.

[www.ipo.gov.uk/consult-2011-copyright.pdf](http://www.ipo.gov.uk/consult-2011-copyright.pdf)

The Strategic Advisory Board for Intellectual Policy (SABIP), 'Copycats? Digital Consumers in the Online Age' (2009), pp. 7, 19.

[www.ipo.gov.uk/pro-ipresearch/ipresearch-year/ipresearch-year-2009.htm](http://www.ipo.gov.uk/pro-ipresearch/ipresearch-year/ipresearch-year-2009.htm)

#### **International**

'Media Piracy in Emerging Economies: Price, Market Structure and consumer Behaviour', World Intellectual Property Organisation: Advisory committee on enforcement, Geneva (2010), p. 9.

[www.wipo.int/edocs/mdocs/enforcement/en/wipo\\_ace\\_6/wipo\\_ace\\_6\\_5.pdf](http://www.wipo.int/edocs/mdocs/enforcement/en/wipo_ace_6/wipo_ace_6_5.pdf)

Joe Karaganis (ed.), 'Media Piracy in Emerging Economies', Social Science Research Council, US (2011) pp. 31, 36. ISBN 9780984125746 <http://piracy.americanassembly.org/the-report/>

'The Implementation of the Notion of "Commercial Scale" versus "Private Use" in the Framework of Directive 2004/48/EC: The Consumer Perspective', European Parliament, Policy Department C: Citizens' Rights and Constitutional Affairs, Brussels (2008), p. 10.

[www.europarl.europa.eu/document/activities/cont/200809/20080926ATT38299/20080926ATT38299EN.pdf](http://www.europarl.europa.eu/document/activities/cont/200809/20080926ATT38299/20080926ATT38299EN.pdf)

### **Representative Media Reporting**

Sam Jones, 'Music industry may seek salvation in "all you can eat" downloads', *Guardian* [online], 10 August 2009. [www.guardian.co.uk/technology/2009/aug/10/music-download-young-people](http://www.guardian.co.uk/technology/2009/aug/10/music-download-young-people)

Bonnie Malkin, 'Teens have 800 illegal songs on iPods', *Telegraph*, 16 Jun 2008.

[www.telegraph.co.uk/technology/3357593/Teens-have-800-illegal-songs-on-iPods.html](http://www.telegraph.co.uk/technology/3357593/Teens-have-800-illegal-songs-on-iPods.html)

Brock Read, 'Young People are Willing to Pay for Legal Music File Sharing, Survey Finds', *Chronicle of Higher Education* (USA), 17 June 2008.

<http://chronicle.com/blogs/wiredcampus/young-people-are-willing-to-pay-for-legal-music-file-sharing-survey-finds/4025>

'Teenagers "have 800 illegal songs" on iPods', *The Hindu* (India), 16 June 2008.

[www.hindu.com/thehindu/holnus/003200806161655.htm](http://www.hindu.com/thehindu/holnus/003200806161655.htm)