Wat er speelt

De positie van makers en uitvoerend kunstenaars in de digitale omgeving

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Executive Summary

The opinions of publishers, producers and consumers concerning copyright in the digital era are fairly well-known. Relatively little is known, however, about the opinions and experiences of creators and performers. This report fills that gap. It turns out that most creators and performers abidingly value copyright, traditional business models and collecting societies.

Data for this study was collected through a survey sent out in the fall of 2010. More than 4.5 thousand respondents, representing a broad range of creative professions, age and income groups, completed the online survey. Generally, digital distribution and commercialisation is perceived as a threat rather than an opportunity. Most respondents are fearful of unauthorised downloading of copyright protected works and think that action should be taken against both consumers and file sharing websites. Hardly any creator shares own work on file sharing websites. An equally small minority appreciates reuse (remixing and sampling) of their work by others. Reuse is by many even perceived as a potential threat of income. A considerable part of the respondents endorsed the use of *digital rights management* (DRM).

The respondents were also asked how they see their bargaining position towards clients and publishers. Most creators and performers do perceive their bargaining position to be weak and support measures to strengthen their position. Overall, respondents were positive about collecting societies (Buma/Stemra, Sena, Norma, Lira, Pictoright, and Vevam) and think that collecting societies arrange what they could not have organised by themselves. On average, collecting societies are positively seen in terms of transparency, participation and service in general. Buma/Stemra is least favourable judged on all these issues.

Underneath these 'averages' lies a variety of opinions and experiences, partly associated with differences in age, income, education and creative discipline. Using cluster analysis, seven types of creators and performers can be distinguished.

Non-affected
18 percent of the respondents belong to the Non-affected. Digital developments have little impact on the activities of these creators and performers. Visual artists, designers and directors belong relatively often to this group, whereas visual authors, singer-songwriters, composers and illustrators are underrepresented. The Non-affected works fewer hours in his creative profession than the average respondent and is less ambitious to work more hours. This group is more

negative about its bargaining position than the average respondent. Nonetheless, there is little support within this group for legislative measures to strengthen their bargaining position. They derive a relatively small share of their income from royalties from collecting societies.

Claimers

Claimers make up about 9 percent of the respondents. They see opportunities in digital developments, but see an equally large threat in unauthorised file sharing. Consequently, Claimers endorse stricter measures against file sharing. Claimers are often responsible for a substantial part of household income and are on average older than all other groups; 80 percent of this group is older than 45 years. Within this group, illustrators, photographers and authors are overrepresented. Earnings in these creative disciplines are highly dependent on copyright, making them vulnerable for unauthorised distribution of their work. This explains why they see Internet both as an opportunity and a threat. Legal arrangements to improve their bargaining position are generally approved of by this group. Claimers are very satisfied with their collecting societies. Strikingly, musicians are underrepresented amongst the Claimers.

Generation 2.0

Around 18 percent of the respondents belongs to Generation 2.0. This group primarily sees opportunities in digital developments, file sharing and remixing. Creators and performers of Generation 2.0 are relatively young, hardly feel financially threatened by digital developments, and work fewer hours as a creator or performer than the average respondent. They would, however, like to work more hours if they would have the chance. They earn a relatively large share of their income outside their creative profession and saw their income increase over the past years. They are more critical than other groups about collecting societies; a relatively large proportion of this group (20 percent) is not associated with their relevant collecting society. The music industry – singer-songwriters, composers and musicians – are clearly overrepresented in this group. This is remarkable, since the music industry was profoundly changed by digitisation, which dramatically affected various professions in the industry. A typical characteristic of Generation 2.0 is that they rely on performing fees for their income, rather than on royalties from collecting societies and commercial agents.

Generation Analog

Generation Analog comprises about 12 percent of the respondents. This group cannot connect with the digital environment. Generation Analog makes little use of social media and sees neither opportunities nor threats in digital developments and file sharing. Generation Analog is older than the average respondent, works many hours and more often than other groups experienced a negative income development. This group derives a large share of its income from royalties from collecting societies and commercial agents. Despite the importance of royalties as a source of income, Generation Analog's satisfaction with collecting societies is similar to other groups. They are even less supportive of collective bargaining by collecting societies about digital reuse of their creations. Authors, translators, journalists, photographers and cartoonists/illustrators are overrepresented in this group, while the music industry, directors, writers and visual artists are underrepresented.

Digital Newcomers

About 17 percent of the respondents belong to the Digital Newcomers. They see opportunities in digital developments and filesharing, but do not know how to take advantage of these opportunities as they make little use of new media. The overrepresented professions in this group (screenwriters, actors, directors and authors) predominantly work in sectors that yet have to experience the opportunities and consequences of digitisation. Compared to the other groups, Digital Newcomers work fewer hours and are less ambitious to work more. They earn their creative income relatively often with (temporary) jobs or contracts. They are satisfied with collecting societies and see a role for them in digital commercialisation. This group is relatively old; three-quarters is older than 45 years.

Self-conscious Makers

About 15 percent of respondents are referred to as the Self-conscious Makers. They earn their income mainly by commercialising their own work and are seldom employed. This is a typical feature of the various professions that are overrepresented in this group: photographers, visual artists, cartoonists/illustrators, and designers. Despite the fact that the works of these creators are easy to distribute digitally, there is a significant group among them which, together with the visual artists, see plenty of opportunities in the digital era. Their aversion of file sharing and remixing, however, stresses that they are also aware of the flipside of digital distribution. Nevertheless, they see many opportunities in digital developments. They frequently use new media and are optimistic about their own bargaining position. Their income development is comparatively positive.

Concerned Young People

Approximately 11 percent of the respondents belongs to the group Concerned Young People. This group is similar to Generation 2.0 in age and professional background, but is considerably more pessimistic towards digitisation and file sharing. They are neither more positive nor more negative than the average respondent about the opportunities of digital developments, and as such a lot less positive than the Claimers and Generation 2.0. The Concerned Young People work many hours in their creative profession. Their income consists mainly of performing fees. In addition, they are less often the main contributor to the household income and they have experienced a negative income development in recent years. They have less education than the average respondent and are less positive about collecting societies.