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power successfully through alliances like the Independent Online Distribution Alliance (IODA) and the Digital Rights Agency (DRA), but there are few outlets that regularly deal directly with the artists themselves. One such exception is CDBaby, which has added a digital distribution service for artists, allowing independent musicians to designate CDBaby as their exclusive online distributor. This service allows artists to sell their downloads through an array of legitimate online music services, including iTunes, Rhapsody, MusicNet, BuyMusic, and Napster, among others, and receive 91% of the profit.²⁵

Most musicians we surveyed report that the internet generally seems to have a positive, if sometimes only minor, impact on their music sales.

The majority of musicians we polled felt that the internet's net effect on sales has been positive for them, with surprisingly little variation according to income. When asked to what degree the internet had made it possible to make more money from their music, two out of five income-earning musicians says they have observed a big effect. Looking across income brackets, 43% of online musicians who earn 80%-100% of their annual income from music, 43% who earn 20%-79% from music, and 39% who earn less than 20% from music say the internet has had a big effect on increasing sales opportunities. Similar portions of each income group reported a small positive effect, and about one in every ten income-earning musicians say they have not observed this effect. Overall, 34% of online musicians say the internet has a big effect on increasing the amount of money they could make, 38% report a small effect, and 16% say it has no effect. Twelve percent of all online musicians say the question doesn't apply to their situation.

Still, when asked an open-ended question about the single most significant impact of the internet on their career, a minority of musicians shared stories of very negative effects on sales that they attribute to free music downloading online. One musician told us: "Downloading has caused very significant reductions in my income from CD sales and has caused corporate consolidation and downsizing, resulting in far fewer opportunities for my songs to be recorded." Another musician expressed a similar sentiment: "Free downloading has killed opportunities for new bands to break without major funding and backing. It's hard to keep making records if they don't pay for themselves through sales."

Having online mechanisms in place for artists to track sales and royalties easily is a major development for working musicians engaged in the business of their music, akin to the advent of online banking tools for the general public. However, while the majority of full-time, income-earning musicians who responded to our survey have already tried tracking their sales, charts or royalties online, there is still room for growth in this activity relative to the popularity of other music-related activities online. Looking again at subcategories, 57% of Success Stories say they use the internet or email to track their sales or chart position and 59% of Starving Musicians say this. Likewise, 43% of Success Stories and 42% of Starving Musicians check their royalties online.

²⁵ For more information, please visit CDBaby's Web site for musicians: <http://www.cdbaby.net/>

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The Internet Effect – Online Musicians Sample			
<i>Has the Internet had a big effect, a small effect, or no effect on you in each of the following ways...?</i>			
	<i>Total Musicians</i>	<i>Success Stories</i>	<i>Starving Musicians</i>
Made it possible to make more money from your music	%	%	%
Big effect on me	34	45	44
Small effect on me	38	45	42
No effect on me	16	8	11
This item doesn't apply to me	12	2	3
Improved your connections with others in the music community	%	%	%
Big effect on me	70	71	79
Small effect on me	23	25	16
No effect on me	5	5	4
This item doesn't apply to me	2	*	*
Allowed you to reach a wider audience with your music	%	%	%
Big effect on me	65	65	75
Small effect on me	23	28	20
No effect on me	6	4	3
This item doesn't apply to me	6	3	2
Made it easier to register copyrights for your music	%	%	%
Big effect on me	28	31	35
Small effect on me	21	25	24
No effect on me	27	30	27
This item doesn't apply to me	23	13	14
Made it easier to keep in touch with friends/family while on the road	%	%	%
Big effect on me	43	57	55
Small effect on me	16	21	19
No effect on me	11	8	10
This item doesn't apply to me	29	14	15
Made it easier to book appearances/coordinate promotional events	%	%	%
Big effect on me	42	56	54
Small effect on me	23	24	24
No effect on me	12	7	11
This item doesn't apply to me	23	12	10
Improved ability to communicate with your audience and fans	%	%	%
Big effect on me	65	74	77
Small effect on me	18	17	16
No effect on me	6	4	4
This item doesn't apply to me	11	5	3
Made it harder to protect your music from piracy or unlawful use	%	%	%
Big effect on me	16	30	20
Small effect on me	21	25	25
No effect on me	41	36	42
This item doesn't apply to me	22	9	13

Source: Pew Internet & American Life Project Musician Web Survey, March-April 2004. Results are based on a non-random sample of 2,755 musicians and songwriters recruited via email notices, announcements on Web sites and flyers distributed at musicians' conferences. Since the data are based on a non-random sample, a margin of error cannot be computed, and the results are not projectable to the entire population of musicians and songwriters.

Three out of four musicians in our survey seek information about copyright laws online.

Before a song is released to the public, many musicians and songwriters choose first to register that work with the U.S. Copyright Office.²⁶ Our findings here suggest the internet is playing a considerable role in facilitating copyright education. Two-thirds of all the musicians who responded to our survey say they look for information about copyright laws and regulations online. And within the various subcategories, Starving Musicians are the most likely to seek information about copyright laws online (74% of these full-time, lower income-earning artists do this), while Success Stories, Part-timers and Non-working Musicians are all equally as likely to seek information (64% of each group do this).

Though musicians cannot currently register their works online through the U.S. Copyright Office's Web site (an online registration feature should be available in 2005²⁷), they can acquire the forms and find directions there. Legal Web sites such as www.legalzoom.com do offer an online copyright registration service that includes assistance in the preparation and mailing of the application, but the copyright owner still must submit a hard copy of the work. When asked if they had used the internet to register the copyrights for their work, 46% of all musicians who use the Web in some way for their music say they have done this. That compares to just over half of full-time income-earning musicians who use the internet to help them register copyrights. But without the online submission feature, the application process is still cumbersome for many. Just over one in four of all online musicians who responded to our survey say the internet has had a big effect on making copyright registration easier.

Musicians are divided over downloading.

Echoing the sharply conflicting opinions within the ongoing public debate about file-sharing, musicians are equally divided over file-sharing services' impact on artists. There is no clear consensus regarding the effects of online file-sharing on artists.

Some 35% of our online musician sample agree with the statement that file-sharing services are *not bad* for artists because they help promote and distribute an artist's work; 23% agree with the statement that file-sharing services *are bad* for artists because they allow people to copy an artist's work without permission or payment. And 35% of those surveyed agree with *both* statements. The responses of Starving Musicians resembled

²⁶ Though copyright protection in the U.S. is automatic once a work is placed into a fixed form, there are some important advantages to formally registering one's work with the U.S. Copyright Office, should an infringement occur. The U.S. Copyright Office provides a brief summary of these advantages here: <http://www.copyright.gov/circs/circ1.html#cr>

²⁷ U.S. Copyright Office "Registering a Work" Available at: <http://www.copyright.gov/help/faq/faq-register.html#online>

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those of the total sample, but Success Stories were more likely to agree that file-sharing services are generally bad for artists (35% said this).

Assessing the impact of free downloading on their careers as musicians, 37% of those in our sample say free downloading has not really made a difference, 35% say it has helped, and 8% say it has both helped and hurt their career. Only 5% say free downloading has exclusively hurt their career and 15% of the respondents say they don't know. Not surprisingly, Starving Musicians are more likely to say free downloading has helped and Success Stories are less likely to say it has helped their careers. Still just 13% of Success Stories say that free downloading has only hurt their career and 16% say it has both helped and hurt.

Of the small group of all musicians who say that free downloading has exclusively hurt their career (n=138), a clear majority (61%) identify themselves as primarily songwriters or composers, rather than performers.

Asked whether online music file-sharing has made it harder to protect their music from piracy, 16% say the internet has had a big effect in allowing piracy of their music, 21% say it has had a small effect, and 41% say it has had no effect. Among Success Stories, twice as many say the internet has had a big effect on increasing piracy (30%), while 25% report a small effect and 36% say the internet has had no effect.

Musicians are split in assessing blame for free file-sharing.

Who should be held responsible for illegal file-sharing online? Musicians in this sample are most likely to say that both those who run file-sharing services and individuals who swap files through those services should be held responsible; 37% of the total sample say this. But 21% said no one should be held responsible. Some 17% said those that run peer-to-peer services should exclusively bear the legal burden, and 12% said individuals who swap files should exclusively bear the burden. Success Stories are even more likely to say that both the services and individuals should be held responsible (48%) and are less likely to say that no one should be held responsible (13%).

Regardless of how much they rely on music for their livelihood, most musicians and songwriters think file-sharing on the internet poses *some* threat to creative industries that make music and movies. One-third of the respondents to the musician survey say file-sharing poses a "major threat" to these industries while one-third say it poses a "minor threat." Another third say file-sharing poses "no threat at all" and 7% say they don't know. Success Stories are more likely to say they think file-sharing poses a major threat (45% say this) and less likely to say it poses either a minor threat (26%) or no threat at all (20%).

One in six of the musicians we polled say they have actually been involved in advocacy or lobbying efforts regarding the issue of copyright infringement or music downloading.

67% of the musicians in our survey say copyright owners should have complete control over the material they copyright, and most say copyright laws do a good job of protecting artists.

Two-thirds of respondents say copyright holders should have complete control over a piece of art once it is produced. Some 28% say the copyright holder should have “some control,” and 3% say the holder should have “very little control.”

Fully 61% of those in this sample believe that current copyright laws do a good job of protecting artists’ rights, but 59% also say that copyright laws do more to protect those who sell art than to protect the artists themselves.

Likewise, most of these musicians think that the current length of copyright terms is “just about right.” Some 47% of respondents say this, while 29% say they think it is “too long” and 13% think it is “too short.”

Most of the musicians and songwriters we polled do not believe current copyright laws “unfairly limit public access to art.” Some 46% disagree with this statement and 21% strongly disagree. However, 15% do agree that current laws unfairly limit public access to art, 8% strongly agree, and 10% say they don’t know. Half of the musicians and songwriters surveyed say they would be bothered if someone put a digital copy of their music on the internet without permission (compared to 37% who say they would not be bothered and 12% who say they don’t know). Some 28% of all musicians and 44% of Success Stories say they have experienced this situation firsthand.

When asked if they would want CDs or digital audio files of their music to be copy-protected so that copies could not be made without their permission, 44% said yes, 44% said no, and 12% said they didn’t know. Starving Musicians were equally split, but 59% of Success Stories said they would want their music to be copy-protected compared to 28% who said they would not want this. Most musicians in our sample do not think that people who intentionally break or disable copy protection mechanisms on CDs and DVDs should be prosecuted for copyright infringement; 46% say this, while 35% say that those who disable copy protection should be held responsible, and 19% say they don’t know. However, Success Stories are more likely to believe those who break copy protection devices should be prosecuted.

Most of these musicians do not think that downloading or sharing media files on peer-to-peer networks without permission should pass the fair use test. However, a majority think that sending a copy of music over the internet to someone you know should be permissible.

While just half of our online musician sample thinks they are somewhat or very familiar with the “fair use” portion of copyright law, they agree with many of the practices that are commonly understood as fair uses of copyrighted material. Nearly all of the

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musicians in the sample agree that activities such as recording a movie or a TV show on a VHS tape, or making a photocopy from a book or article for personal use should be allowed. Posting an excerpt of a story or article online to critique or comment on it is also viewed by nearly all the respondents as an activity that should be considered legal, as is act of ripping a digital copy of music onto a personal computer from a purchased CD.

However, when asked about sharing copyrighted content online, the level of tolerance decreases as the potential scope of distribution increases. For instance, most musicians, including Success Stories, think that sending a digital copy of music over the internet to someone you know should be considered legal, but clear majorities do not think downloading and file-sharing on peer-to-peer networks should qualify as fair use of copyrighted material. Similarly, these musicians clearly see copying for commercial use as unacceptable and not within the realm of fair use. Some 95% of our sample says that making copies of music, movies or television programs and selling them to other people without permission from the copyright holder should be illegal.

On the other hand, there is no clear consensus on whether burning a copy of a CD or a movie for a friend should be permissible; 47% think this should qualify as a legal fair use, while 41% think this should be illegal, and 12% say they don't know. They are similarly divided over the prospect of copying a computer program like Microsoft Word or Photoshop for personal use; 40% think this should be legal, 45% think it should be illegal, and 15% say they don't know.

Yet, Success Stories stand out as being wary both of burning CDs or DVDs and copying computer programs; roughly one-third of this group thinks these activities should be legal under fair use provisions, while about half say they should be illegal.

83% have provided free samples of their work online and significant numbers say free downloading has helped them sell CDs and increase the crowds at concerts.

Fully 83% of those in the survey say they provide free samples or previews of their music online. Strong pluralities say free downloading has a payoff for them. For instance, 35% of them say free downloading has helped their careers and only 5% say it has hurt their careers. Some 30% say free downloading has helped increase attendance at their concerts, 21% say it has helped them sell CDs or other merchandise; and 19% say it has helped them gain radio playing time for their music. Only a small number cite any negative impact of downloading on those aspects of their work. However, Success Stories are less likely to note positive impacts.

Many of these musicians and songwriters do not think the RIAA campaign against free file-sharing on the internet will benefit them, though responses varied according to one's personal experience with unauthorized downloading.

Many of the musicians we polled do not think the recording industry's legal efforts to stem the tide of free sharing of music on the internet will benefit those who create and perform music.

Some 60% of those in the sample say they do not think the Recording Industry Association of America's suits against online music swappers will ultimately benefit musicians and songwriters. Those who are working full-time and earn the majority of their income from music are more inclined than struggling musicians to back the RIAA, but even those deeply invested musicians do not believe the RIAA campaign will help them. Some 43% of Success Stories do not think the RIAA legal efforts will help them, while 36% do think those legal challenges will ultimately benefit them.

However, many respondents find this question difficult to answer; 18% of all musicians say they don't know if the legal campaign will ultimately help them and 22% of Success Stories say they don't know.

Furthermore, among the small group of musician respondents who say their careers have only been hurt by free downloading (n=138), 68% say they think the lawsuits *will* benefit musicians and songwriters, 17% do not think they will benefit, and 14% say they don't know.

Musicians download and share, too, but few think that has decreased the amount they spend on music purchases.

Our highly-wired sample of musicians contains twice as many music downloaders, movie downloaders and file-sharers when compared to our data on artists and the general public. In all, 56% of the musicians and songwriters in our sample say that they download music and 34% say they download video files. Some 43% of these musicians say they share files with others online, such as music, videos, photos or computer games.

However, in stark contrast to the data we have gathered from the general public, the majority of music-downloading musicians in our survey (58%) say they do care whether the music they download is copyrighted. Just 38% of music-downloading musicians say they don't care much about the copyrights on those files.

Half of these downloading musicians say that downloading has not really changed the amount of money they spend on music purchases overall and 42% say they think that downloading has actually increased the amount spent on items such as CDs, concerts or

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other music products. Less than 10% think that downloading has decreased what they spend on music purchases and 2% say they don't know.

We also asked both music downloaders and video downloaders (n=1,595) whether they had paid anything the last time they had downloaded a file, and if not, whether they had permission to download the file for free. More than three-quarters of the sample (79%) say that the file they downloaded was free, and 18% say they paid to download the file. Of those who downloaded a file for free, 40% say the copyright owner had given permission, 13% say the owner did not give permission, and 26% say they don't know, remember, or refused to answer.

More than three-quarters of these music and video downloading musicians say that even if they download media files for free, they usually end up supporting the artist or author in other ways, such as buying a CD or book, or going to a performance. Just one-third of these musicians say that the high price of most media content justifies downloading files from the internet.

Musicians have a wide range of ideas about how to best address the unauthorized distribution of music online.

As one of two open-ended questions in our online survey, we asked musicians what they thought would be the best approach to dealing with the unauthorized music distribution of music online. Fully 87% of all musicians and songwriters provided a response to this question. The answers represent a broad spectrum of opinions that reflect the diverse and varied experiences of musicians and music fans, stretching from "all music should be free, so stop worrying about it" to "file-sharers should be put in jail."

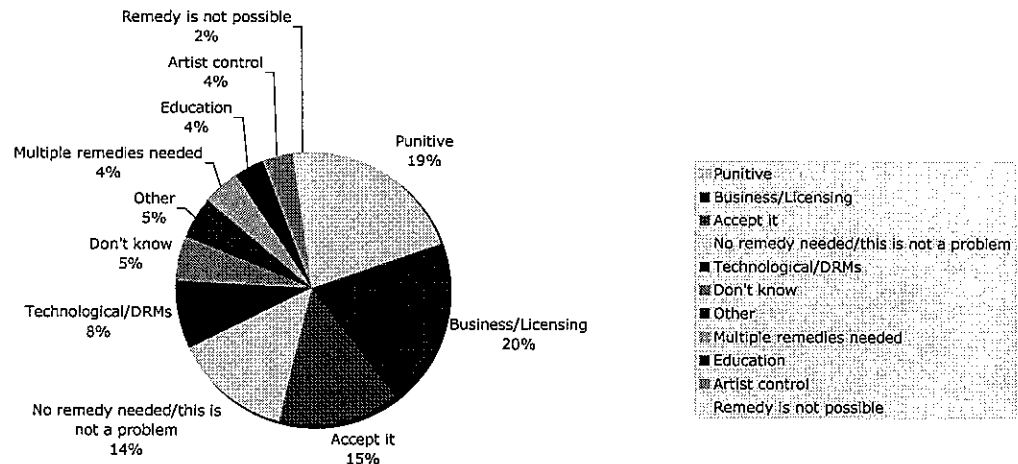
A surprising number of respondents said that peer-to-peer file-sharing is not the problem, but that it is a symptom of bigger structural issues for the major labels. Many respondents suggested that the music industry needed to recognize the changes that peer-to-peer and digital entertainment in general have brought to the music industry, and change its business model to embrace it, instead of fighting it.

Another batch of respondents used this question to talk about the need for artists to control their own music. While negotiating control over content is difficult in a digital environment, many artists suggested that decisions over peer-to-peer file-sharing and digital distribution should be made by the artist, not the label.

Furthermore, there is some confusion among these musician respondents about how peer-to-peer networks function. Many thought that there must be a technological or legal remedy that would allow copyright owners to "shut down" or "limit" P2P sites, thus stopping the piracy at the source. Others thought that there might be a way to "limit" how much copyrighted material an internet user can download. However, peer-to-peer systems are not Web sites at all but a distributed network, so control at the ISP or web hosting level is not feasible.

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Given these challenges, we were able to group the responses into eleven loosely-defined categories, but even these show a significant amount of internal variation, which are expressed in the chart below:



Despite the variation in these musicians' proposals, most responses fell into one of four dominant categories:

The answers in the "Punitive" category range from palpable anger, to joking, to agreement with the RIAA's current legal strategy of suing individuals who are sharing substantial numbers of files. There are also many who suggest that the best approach is to punish the peer-to-peer services that facilitate this kind of trading instead of the consumers.

At the opposite end of the spectrum are those who think that no remedy is needed. These are the respondents who tend to say that file-sharing is good, that it has helped them with their careers, that music should be free so stop trying to crack down on peer-to-peer, or that the biggest victims are the major labels that need to revise their business models.

In the middle are those in the "Accept it" category who are resigned to the inevitability of unauthorized distribution and think it is best to work with it, rather than against it. Others are more positive and see peer-to-peer not as a threat but an opportunity for free promotion. Many in this category thought that the music industry's campaign against file-sharing was not the best approach and that they need to embrace peer-to-peer and

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work with it to promote their artists. Finally, many diverged from the discussion of peer-to-peer altogether and talked about structural problems in the music industry – the price of retail CDs, the bottleneck on radio promotion, contract terms – to say that the music industry needs to adapt.

Those who fall into the “Business/Licensing” category say that the iTunes model of a pay-per-play store or the Rhapsody-style subscription service is the best solution – something legal, convenient, robust, and fairly priced. There was also a notable amount of support for Weedshare – an incentive-based system of restricted file-sharing that allows the artist to be compensated as the file gets traded more. This section also includes many respondents that articulate the basic idea of alternative compensation systems – those that track the files, or suggest that ISPs or peer-to-peer services add a monthly user fee and pay the artists based on usage.

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What the general public believes

Consumers have different views of copyright issues from musicians and artists.

The Pew Internet & American Life Project surveyed the general population on some of these same issues in a poll of 2,013 American adults conducted between November 18 and December 14, 2003.

Among other things, the survey showed that American **consumers are less familiar with current copyright laws and regulations than the creative public.** For instance, while 43% of the general public say they are somewhat or very familiar with copyright laws, 54% of artists from our callback sample say this. Similarly, 18% of the general public say they are somewhat or very familiar with the fair use portion of copyright law, compared to 24% of artists who report this.

Consumers are more likely than artists to say that the current length of copyright is too long, though almost half of consumers say that the life-of-the-artist-plus-70-years term is appropriate. Some 29% of consumers believe the term is too long, compared to 20% of all artists in the callback sample. However, artists are more likely than the general public to agree that copyright laws either “unfairly limit public access to art” or “do more to protect those who sell art than to protect the artists themselves.”

Average consumers also reported somewhat more conservative views about the legality of some well-established fair use practices when compared to artists. When asked whether or not certain activities, done without permission from the copyright holder, *should be* considered legal or illegal under the fair use provisions of copyright laws, the general public was more likely than artists to say that common practices, such as taping TV shows and movies or making photocopies of articles, should be considered illegal. A table comparing the answers among all the samples on similar questions can be found at the end of this section.

Still, it is true that the vast majority of both groups think that these activities should be permissible. And when asked more complex questions about burning and ripping CDs, downloading music and movies from peer-to-peer networks and making copies to sell to other people, consumers’ views lined up exactly with artists’ views. Consumers do not think people other than copyright holders should profit from the creation.

Like artists and musicians, the vast majority of consumers who download music or video files (68%) say that when they download media files for free, they usually end up supporting the artist or author in other ways, such as buying a CD or book, or going to a performance. Just over half of these downloaders (54%) say that they don't currently pay to download any type of media files right now, but they would if the price, quality, and choice they wanted were available.

A Comparison of Musicians', Artists' & the General Public's Views on Fair Use

Assuming a person does NOT have permission from the copyright holder, do you think each of the following should be LEGAL or ILLEGAL under the "fair use" portion of copyright laws?

	Should be Legal	Should be Illegal	Don't Know/Refused
Recording a movie or TV show on a VHS tape to watch in your own home at a later time	%	%	%
March 2004 Online Musicians Survey	90	6	4
December 2003 Artists Callback	90	8	2
November 2003 General Public Random Sample	81	15	4
Making a photocopy from a book or article for personal use	%	%	%
March 2004 Online Musicians Survey	91	5	4
December 2003 Artists Callback	89	10	1
November 2003 General Public Random Sample	77	18	5
Burning a copy of a music or movie CD for a friend	%	%	%
March 2004 Online Musicians Survey	47	41	12
December 2003 Artists Callback	46	48	6
November 2003 General Public Random Sample	43	50	8
Downloading a music or movie file off a file-sharing network like Kazaa or Morpheus	%	%	%
March 2004 Online Musicians Survey	33	48	19
December 2003 Artists Callback	35	49	15
November 2003 General Public Random Sample	33	50	18
Sharing a music or movie file from your computer over a file-sharing network	%	%	%
March 2004 Online Musicians Survey	33	50	18
December 2003 Artists Callback	37	52	12
Posting an excerpt of a story or article online to critique or comment on it	%	%	%
March 2004 Online Musicians Survey	89	5	6
December 2003 Artists Callback	72	22	6
Ripping a digital copy of music on your own computer from a CD you purchased*	%	%	%
March 2004 Online Musicians Survey	90	6	5
December 2003 Artists Callback	73	23	4
November 2003 General Public Random Sample	66	26	7
Making copies of music, movies or television programs and selling them to other people*	%	%	%
March 2004 Online Musicians Survey	3	95	2
December 2003 Artists Callback	7	91	2
November 2003 General Public Random Sample	6	91	3
Sending a digital copy of music over the Internet to someone you know	%	%	%
March 2004 Online Musicians Survey	56	31	13
December 2003 Artists Callback	46	49	5
Making a copy of a computer program such as Microsoft Word or Photoshop for your own use	%	%	%
March 2004 Online Musicians Survey	40	45	15
December 2003 Artists Callback	47	48	5

Sources: Pew Internet & American Life Project Musician Web Survey, March-April 2004. Results are based on a non-random sample of 2,755 musicians and songwriters recruited via email notices, announcements on Web sites and flyers distributed at musicians' conferences. Since the data are based on a non-random sample, a margin of error cannot be computed, and the results are not projectable to the entire population of musicians and songwriters. Pew Internet & American Life Project Artists Callback Survey, fielded November-December 2003 among a sample of 809 self-identified artists. Margin of error is ±4% for results based on all online artists. Pew Internet & American Life Project Tracking Survey, fielded November-December 2003 among a sample of 2,013 adults. Margin of error is ±3% for results based on internet users. *Note that December-November 2003 trend items read: "Making a digital copy of music on your own computer from a CD you purchased" and "Making copies of movies or television programs and selling them to other people."

Methodology

Artists callback survey

The results in this report are based on data from telephone interviews conducted by Princeton Survey Research Associates International from November 3 to December 7, 2003, among a sample of 809 self-identified artists, 18 and older, who were interviewed in past Tracking surveys. For results based on the total sample, one can say with 95% confidence that the error attributable to sampling is plus or minus 4 percentage points. In addition to sampling error, question wording and practical difficulties in conducting telephone surveys may introduce some error or bias into the findings of opinion polls.

The artists who responded to our callback survey were self-identified. Our method of identifying artists was modeled after an identification method previously utilized in an Urban Institute study of support structures for artists in the U.S.²⁸ We recruited for the artists survey through several general population surveys throughout 2003. Respondents to our general population surveys were asked if they “study, practice, or do” any of the following activities: drawing or painting, creative writing, music, acting, dancing, filmmaking, or any other type of artistic activity.

At least 10 attempts were made to complete an interview at every household in the sample. The calls were staggered over times of day and days of the week to maximize the chances of making contact with a potential respondent. Interview refusals were re-contacted at least once in order to try again to complete an interview. The final response rate was 57.8%.

Non-response in telephone interviews produces some known biases in survey-derived estimates because participation tends to vary for different subgroups of the population, and these subgroups are likely to vary also on questions of substantive interest. In order to compensate for these known biases, the sample data are weighted in analysis. The final sample of completes was weighted to match the demographics of the original callback sample. The weights were derived using an iterative technique that simultaneously balances the distribution of all weighting parameters.

Musicians online survey

The Musician Web Survey, sponsored by the Pew Internet & American Life Project, obtained online interviews with a non-random sample of 2,793 musicians, songwriters and music publishers. The interviews were conducted online, via WebSurveyor, from

²⁸ The Urban Institute Study, “Investing in Creativity: A Study of the Support Structures for U.S. Artists” is available at: <http://www.usartistsreport.org/index.asp>

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March 15 to April 15, 2004. Details on the design, execution and analysis of the survey are discussed below.

Sample Design/Contact Procedures

Sample was recruited via email invitations to the current membership/subscriber lists of the following music organizations: The Future of Music Coalition, Just Plain Folks, American Federation of Television and Radio Artists, CD Baby, Nashville Songwriters Association, Garageband.com, American Society of Composers, Authors and Publishers, American Federation of Musicians.

Altogether, email invitations to participate in the survey were sent to approximately 300,000 members of these various organizations. These invitations provided a direct link to the survey and contained the following language:

Dear Members,

[ORGANIZATION NAME HERE] has been working in partnership with the Future of Music Coalition, the Pew Internet & American Life Project and an array of other musician-based organizations to design a balanced survey that will give musicians, performers and songwriters a chance to speak up about the Internet, file-sharing, and copyright issues. We all know that new technologies have created many complex challenges as well as many new opportunities for musicians, yet we often hear more about how businesses and consumers are responding to these changes at the expense of understanding how artists think and feel about these issues.

Now's the time to make your voice heard.

We invite you to take about 20 minutes of your time to share your opinions and experiences through this important survey.

Visit <http://websurveyor.net/wsb.dll/11719/Music.htm> from March 15 – April 15, 2004 to participate.

Your contribution will have a valuable impact, as the findings from this survey will be widely circulated and discussed.

Don't miss this great opportunity to speak up on behalf of artists!

Sincerely,

[ORGANIZATION REP]

In addition to sending email invitations to their members, The Future of Music Coalition, Garageband.com and The American Federation of Television and Radio Artists posted a notice about the survey on their websites that provided a direct link to the survey front page. The Future of Music Coalition also printed flyers announcing the survey, including

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the URL, and distributed them at several musicians' conferences held during the survey field period. Both the website postings and the flyers contained the following text:

Musicians, performers, and songwriters: What do you think about peer-to-peer file-sharing and music on the Internet? How has the Internet impacted the way you create, promote, or distribute your music?

[ORGANIZATION NAME HERE] has been working in partnership with the Future of Music Coalition, the Pew Internet & American Life Project and an array of other musician-based organizations to design a balanced survey that will give musicians, performers and songwriters a chance to speak up about the Internet, file-sharing, and copyright issues.

We've all heard speculations about what musicians are "really thinking" in the changing digital landscape. Yet, from our vantage point inside the music community these projections have always seemed too narrow to represent the complex concerns we regularly experience in our discussions with musicians.

It's time to stop projecting our thoughts and preferences onto musicians and, instead, ask musicians to share their own experiences and opinions.

To that end, CD Baby, Just Plain Folks, Nashville Songwriters Association, AFTRA, and AFM, the Future of Music Coalition and the Pew Internet & American Life Project have designed an online survey that asks musicians a variety of questions about music, technology, copyright, peer-to-peer filesharing, emerging best practices, and the public domain.

We urge musicians, songwriters and performers of all types to take this online survey so we can better understand the complexity of these changes and the diversity of our community.

Visit <http://websurvevor.net/wsb.dll/11719/Music.htm> from March 15 – April 15, 2004 to participate.

When the survey is complete the results will be published and distributed to those who have a critical stake in the current debate. We hope they will open another channel in the discussions about how music will be enjoyed, and how musicians will be compensated in the future.

About the Future of Music Coalition:

The Future of Music Coalition is a not-for-profit collaboration between members of the music, technology, public policy and intellectual property law communities. The FMC seeks to educate the media, policymakers, and the public about music / technology issues, while also bringing together diverse voices in an effort to come up with creative solutions to some of the challenges in this space.

The FMC also aims to identify and promote innovative business models that will help musicians and citizens to benefit from new technologies.

About the Pew Internet & American Life Project:

The Pew Internet Project is a nonprofit, non-partisan think tank that explores the impact of the Internet on children, families, communities, the work-place, schools, health care, and civic/political life. The project aims to be an authoritative source for timely information on the Internet's growth and societal impact. Support for the project is provided by The Pew Charitable Trusts. The project's Web site: www.pewinternet.org

Completion Rate

Based on figures supplied by WebSurveyor, PSRAI has calculated the following completion rate for the Musician Survey:

	<u>Number</u>	<u>Rate</u>
Total Hits	5,702	
Total Starts	3,918	68.7%
Ineligible respondents (not a musician, songwriter, or music publisher)	130	
Total Eligible Starts	3,788	96.7%
Total Completes	2,793	73.7%
Final Completion Rate		73.7%

In Table 1, total hits (5,702) indicate the number of times the survey link was accessed, or roughly the number of potential respondents who reached the survey's title page, though no control was in place to prevent someone from accessing the link more than one time. The link took people to the survey title page, which gave the following brief description of the survey and its sponsors, along with instructions for how to complete the survey:

Welcome to the Pew Internet & American Life Project's musician survey. The goal of this survey is to measure the impact of the Internet on songwriters and musical performers. Thanks so much for taking the time to help us better understand how the Internet affects your music, as well as how you communicate with other artists, artists' organizations, and fans.

Our survey will take most respondents about 20 minutes to complete, though it may be longer or shorter for some people. Most questions give you response categories from which to choose. Others are followed by a blank text area where you can write your answers. The text areas will hold up to 300 words, so feel free to make your answers as long as you like. You must provide an answer to each question in order to move to the next; once you answer a

question and move on, you will not be able to return to that question to change your answer.

Please complete the survey only once.

If you have questions about the survey, or if you'd like to send us additional input later, we'd be glad to hear from you at Music@pewinternet.org.

CONFIDENTIALITY NOTICE

As with all studies we conduct with our survey research firm, Princeton Survey Research Associates International, all of your answers are completely confidential. Responses are analyzed only in the aggregate, and are never linked to the individual completing the survey. No identifying information is required to complete this survey, other than basic demographic characteristics.

If you have any questions about this survey, or concerns about confidentiality, please feel free to contact MusicSurvey@psra.com or the Pew Internet & American Life Project at Music@pewinternet.org.

Go to <http://www.pewinternet.org> for more about the Pew Internet & American Life Project, or go to <http://www.psra.com> for more about Princeton Survey Research Associates International.

Total starts (3,918) indicate the number of people who, upon reading the title page, clicked the “next” button to self-select into the survey. Based on screening questions in the survey, 130 of these respondents were deemed ineligible because they were not part of the target population of musicians, songwriters or music publishers, and thus were removed from the final sample. That left 3,788 total eligible starts. Total completes (2,793) indicate the number of eligible respondents who completed the survey. The final completion rate for the survey is computed as the number of eligible completes (2,793)/the number of eligible starts (3,788), or 74%.

Questionnaire Development

The questionnaire was developed by PSRAI in collaboration with staff of the Pew Internet & American Life Project and their partners in the music community. Many questions were originally asked in Pew Internet RDD telephone interviews with previous samples of adults age 18 and older and self-identified artists. Where appropriate, questions were modified to focus on music only (as opposed to artistic work in general), and to reflect the principles of online survey design, which varies in some ways from telephone survey design.

General population tracking survey

This report is based on the findings of a daily tracking survey on Americans' use of the Internet. The results in this report are based on data from telephone interviews conducted

Methodology

by Princeton Survey Research Associates between November 18 and December 14, 2003, among a sample of 2,013 adults, 18 and older. For results based on the total sample, one can say with 95% confidence that the error attributable to sampling and other random effects is plus or minus 2 percentage points. For results based Internet users (n=1358), the margin of sampling error is plus or minus 3 percentage points. In addition to sampling error, question wording and practical difficulties in conducting telephone surveys may introduce some error or bias into the findings of opinion polls.

The sample for this survey is a random digit sample of telephone numbers selected from telephone exchanges in the continental United States. The random digit aspect of the sample is used to avoid "listing" bias and provides representation of both listed and unlisted numbers (including not-yet-listed numbers). The design of the sample achieves this representation by random generation of the last two digits of telephone numbers selected on the basis of their area code, telephone exchange, and bank number.

New sample was released daily and was kept in the field for at least five days. This ensures that complete call procedures were followed for the entire sample. Additionally, the sample was released in replicates to make sure that the telephone numbers called were distributed appropriately across regions of the country. At least 10 attempts were made to complete an interview at every household in the sample. The calls were staggered over times of day and days of the week to maximize the chances of making contact with a potential respondent. Interview refusals were recontacted at least once in order to try again to complete an interview. All interviews completed on any given day were considered to be the final sample for that day. The final response rate was 31.3%.

Non-response in telephone interviews produces some known biases in survey-derived estimates because participation tends to vary for different subgroups of the population, and these subgroups are likely to vary also on questions of substantive interest. In order to compensate for these known biases, the sample data are weighted in analysis. The demographic weighting parameters are derived from a special analysis of the most recently available Census Bureau's Current Population Survey (March 2003). This analysis produces population parameters for the demographic characteristics of adults age 18 or older, living in households that contain a telephone. These parameters are then compared with the sample characteristics to construct sample weights. The weights are derived using an iterative technique that simultaneously balances the distribution of all weighting parameters.