SUMMARY OF THE L'ATELIER BNP PARIBAS SURVEY

FOR THE 2012 FORUM D'AVIGNON

Within the framework of the discussions initiated by the 2012 Forum d'Avignon think tank, L'Atelier BNP Paribas conducted a survey to measure how younger generations use digital technologies to interact with and create cultural content, and, in particular, to learn more about the content that they themselves create, share and publish.

The Forum d'Avignon wanted to lend a voice to the digital generations, whose methods of accessing and disseminating culture vary significantly: from the digital natives, whose window on the world is the search engine; to generation Y that communicates with, for and through social networks; to generation Z, whose members "tweet" constantly. What are the common trends? What are the weak signals?

An international survey of young people, focusing particularly on students

The survey, developed by L'Atelier in association with the Forum d'Avignon and its partners, was conducted online by GfK with an **international respondent pool** of 507 young people aged 15 to 25. Participants included **100 young people** from the five main regions of **France** (the Northeast, Northwest, Southeast, Southwest and Paris regions), **102** from the twelve German Länder, **101** from 29 states in the USA, **102** from the four main regions of India (Andhra Pradesh, Maharashtra, Tamil Nadu and Uttar Pradesh) and **102** from Seoul and the Gyeonggi Province in South Korea.

Gender equality was broadly respected, with approximately 51.70% male respondents and 49.30% female respondents.[1] The **age distribution** of the respondents was **50%** young people aged **between 15 and 18**, and **50%** aged between **19 and 25**. **The interviews were conducted** in French, English and Hindi (for approximately 3% of the survey sample in India).

Most of the young people who were interviewed were students, and more than a quarter of our panel was made up of people in the workforce. Individuals who were unemployed or otherwise outside the workforce represented about 7% of the sample.

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[1] Gender equality was not fully respected in India, where 58.8% of interviewees were male, nor in France, where 45% of respondents were male. Gender equality was respected in the other countries in the panel.

Status of the young people on the international panel

Source: L'Atelier BNP Paribas survey for the 2012 Forum d'Avignon
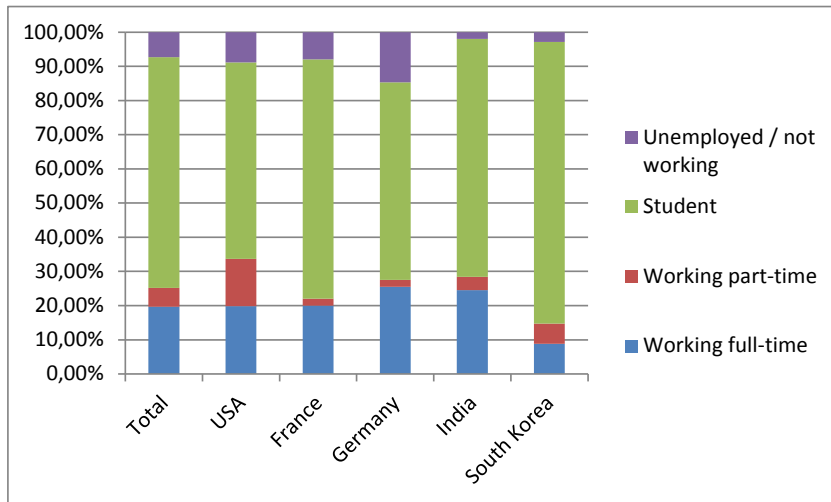
More than **67%** of the sample group were **students** (82% in South Korea, 70% in France and India, and 57% in the United States and Germany). Nearly **20%** of interviewees were **employed full time** (nearly 25% in Germany and in India, vs. 9% in South Korea). Nearly **6% were employed part-time** (14% in the United States, 2% in France and Germany, and 4% in India). Approximately **7% were unemployed or not working** (15% in Germany, 2% in India and 3% in South Korea).

KEY CONCLUSIONS OF THE SURVEY

Across the globe, the vast majority of "connected" young people use digital networks for cultural purposes. For example, more than **87%** of the young people on our panel state that they use the Internet to find new cultural content, and nearly **83%** of them use social networks in particular.

Having a choice ... without having to choose

But **the widespread adoption of new practices based on the use of digital networks does not necessarily imply the *de facto* abandonment of older cultural practices.** For example, **personal networks**[2] are more popular than the Internet for discovering new cultural content. Personal networks were used by more than **93%** of the young people on our panel, despite the fact that the majority of these participants appear to be convinced that the cultural content available on the Internet is more varied than the cultural content that they access through non-digital means.[3]

Popularity: the novelty premium

The new digital media that have recently emerged do not necessarily replace older media, but can surpass them in popularity, at least for certain purposes. For example, for identifying new cultural goods, the Internet, used by more than **87%** of young people, is more popular among young people than the mediums of television or radio. Television and radio are themselves used by more than **84%,** and are therefore more popular than social networks, used by more than **83%** of young people. But social networks are already more popular than newspapers and magazines, which are used by **72%** of young people.

Discovering or sharing: to each his own

Each generation of applications tends to become specialised for particular uses: for example, in our panel, while first generation Internet services are more popular than social networks for **discovering** new content, when it comes to **sharing** cultural content, social networks, used by nearly **77%** of the young people on our panel, are more popular than older generations of Internet applications, used by nearly **70%** of them. For **sharing**, personal networks are used by more than **88%** of young people, and remain more popular than Internet-based methods.

The order of these preferences could change over time, and eventually the popularity of the Internet and social networks is likely to increase further relative to other means of

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[2] Family, friends, colleagues, etc.
[3] Nearly 52% think that it is more varied, and nearly 42% think that it is equally varied

accessing culture, not least because the proportion of "connected" young people will continue to grow. To paraphrase Bill Gates[4], if we generally tend to underestimate the impact of the digital revolution over a 10-year period, in 2012 we probably also tend to overestimate the effects with respect to our two-year forecasts.

Everything, for everyone, right now ... and all for free

For nearly twenty years, **digital leaders have promoted, on a global scale, consumer behaviours and a culture of "consuming" cultural goods based on three principles that are at odds with our "pre-digital" cultural habits: completeness, simplicity and zero cost to the consumer. 86%** of the young people on our panel believe that, on the Internet, cultural content should be accessible to everyone. Nearly **94%** think that all cultural content should be easily accessible. More than **82%** of them think that all cultural content should be available free of charge.

Our survey shows that, although **these three principles, ideals or desires rank high in the digital culture of young people, these qualities do not necessarily conflict with the respect for the rights of the artists or creators of these cultural goods.** More than 70% of the young people on our panel feel concerned[5] by copyright laws. Of the 30% who are not concerned about this issue, fewer than 10% feel "not at all concerned".

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[4] The founder of Microsoft Corporation
[5] Positively or negatively; in other words, they consider this to be an important issue

An adequate level of awareness about copyright issues, given that the laws – which are neither unified nor explained – are not well understood

The majority of the young people in the survey were satisfied by the systems of copyright management currently in effect. More than **60%** of them feel that these systems are fairly effective. Only slightly more than 9% of them feel that these systems are not at all effective, while nearly 13% feel that they are completely effective.

But the differences between the systems of copyright management currently in effect were not necessarily well understood by the young people. More than **20%** of the participants stated that they did not know what system was in effect in their country[6] and among those who thought that they knew the answer to this question, some were simply wrong: in Germany, for example, nearly **76%** of young people believed that they knew which system was in effect in their country, but nearly **61%** of these young people believed that it was the *Copyright* system. The efforts made in recent years to make these two main systems interoperable have made it difficult for the members of the general public to distinguish between them. In practical terms, the common translation of the French term "droit d'auteur" by the English term "copyright" has contributed even more to making the two systems equivalent to each other, or at least difficult to distinguish, in the eyes of young people[7]. The differences between these two concepts can largely be explained by historical factors; accordingly, it is understandable that today's young people are confused, even when they find the deeper underlying reasons to be justified. However, the two systems do not have the same implications in terms of the use of digital or digitised works, in particular when it comes to using existing content for new creations.

The majority of young people support compensation systems under "droit d'auteur" and copyright law, and they seem satisfied with the existing systems <u>to the extent that these systems do not appear to conflict with their use of the materials.</u>

In practice, **among the four systems for compensating authors that are most frequently used for online cultural goods**, the two **most popular** are those that offer **free content** for the use of the general public. Free content based on online advertising is the most popular mechanism: nearly **76%** of young people in the survey stated that they were in favour of this system[8] and more than **70%** of them stated that they use this mechanism in practice. While young people state that they prefer subscription services to free services provided in

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[6] The "droit d'auteur", or system of author's rights based on civil law, is the historic system which is the foundation of the rights of authors, artists and performers in Germany, France and South Korea. Copyright, based on Common Law rulings, is the historic system currently in effect in the United Kingdom, the United States and in India.

[7] At least for the purposes of our survey, as the questions were asked in English for the young Germans and South Koreans

[8] The largest number in favour

exchange for providing personal data (nearly **64%** are in favour of subscription-based services, while more than **60%** are in favour of free services), in practice nearly **63%** of them use free services, while only **54%** use subscription-based services. Pay-per-use is in fourth position (more than **55%** are in favour, and more than **51%** actually use these services).

Nearly **18%** of young people think that **other systems for compensating authors are feasible.** As possible alternatives, some cite, for example, free content sponsored by indirect advertising (points earned through purchases, gifts offered by brands based on Internet users' consumption patterns, etc.). These mechanisms are starting to be developed as a logical extension of the model of free content "paid for" by the voluntary submission of personal data.

The preferences of young people for certain methods of compensating authors can be explained by the way they "consume" cultural goods on digital networks.

Music, first and foremost

Among the cultural goods consumed by young Internet users, **music** is the **most popular** (more than **94%** of them use the Internet to discover new music), followed by **videos and films** (more than **92%**), then **photos and images** (nearly **91%**). These three types of **content are primarily consumed through direct online access.** Nearly **91%** of young people consume music through **direct online access**, while nearly **90%** access photos and **87%** access videos. By comparison, **86%** of young people **download music**, nearly **83% download photos** and **74% download videos**.

Free of charge to attract users ... and to keep them!

While systems that involve downloading goods have historically favoured a pay-per-use approach, online access systems have generally adopted _**fremium**_ models. These are models that combine a subscription payment model with free goods paid for by advertising revenue. Delivering goods free of charge is undoubtedly a very attractive mechanism for encouraging young people to use a new distribution service for cultural content and retaining them over the medium or long term. Subscription fees are easily justified for those young people who become heavy users of a given service, although in this case the price point is a critical factor in retaining user loyalty in a highly competitive environment.

Accessing cultural goods, primarily to share them with their communities

Applications that provide direct online access to cultural goods have the advantage of facilitating sharing – easily and legally – compared to downloading mechanisms that restrict the use of the content to individual, personal use, in the absence of simple and legal mechanisms for the use of downloaded materials. While nearly **95%** of young people access cultural goods online for **personal use**, nearly **32% state that they share this content with others**.

Content sharing is an important phenomenon in the cultural life of young people. More than **88%** of them state that they **share** new cultural goods that they have discovered through their **personal networks.** Nearly **77%** share via **social networks** and nearly **70%** share using other **Internet applications**. **Sharing** does not necessarily imply giving the cultural good to others, but may refer to **enjoying it together, talking about it, recommending it, commenting on it, criticising it, linking to it, etc.** On social networks, a set of mechanisms known as **social plug-ins** enabled each Internet user to share his or her cultural references with a single click[9], to add comments[10] or to send links to other applications or to other specific individuals[11]. This affects not just digital content with direct online access, but also the **majority of non-digital cultural goods**, which can be shared via a *tweet*[12], a photo, a video, a blog post, a mobile geolocation app, etc.

In the digital world, there are things that exist ... and also things that I create using things that exist

Sharing affects not only cultural goods that have been created by others, but also **derivative cultural content**, referenced by Internet users or even created by the Internet users themselves, either based on existing cultural goods or created from scratch.

The **creation of cultural content by young people** is thus very closely **linked** to the phenomenon of sharing. This is a phenomenon that is itself beginning to expand. More than **10%** of young people state that they **use digital cultural content** to create their own new content.

Young people now have digital applications at their disposal that enable them to personally create most of the types of cultural content that they have access to on the Internet. For example, nearly **85%** state that they use applications that enable them to create **photos**, more than **58%** use applications to create **videos**, nearly **53%** for **music**, and more than **40%** for **books**. These applications, the majority of which have free versions, have achieved a level of simplicity that allows them to be readily used by the general public, while providing results worthy of tools that were reserved for professionals only a few years ago.

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[9] The *Like* command
[10] *Comment*
[11] *Share*
[12] Message shared on the *Twitter* social network

Bon APP-etit

On the other hand, **55%** stated that they use **applications distributed via social networks**; in other words, applications that provide simple or even automatic functions enabling them to share objects that they have created via social networks. With these applications, each act of creation is *de facto* an act of sharing.

Digital creators of the world, go forth and share

Finally, nearly **50%** of young people state that they use computer programming applications. These applications enable users to create not only games, but also all sorts of programs that may in turn be used to create new cultural content. **This finding, in and of itself, is important enough to suggest that a new *middle class of creators* is probably in the process of emerging, and on a global scale.**

In 2012, the majority of young people *with access to computers* are personally creating digital content that can be characterised as cultural goods. For example, nearly **59%** of the young people on our panel **state that they personally create photos**, more than **37%** create **films and videos**, nearly **37%** create **music**, more than 30% create **games** and nearly **30%** create **books**.

We share more than we create: findings for Europe

In France and Germany, the rate at which young people share and create cultural goods is below the average of our international panel. Is there a correlation between these two types of uses? Is the need, desire or reflex to share, one of the triggering factors or one of the principle motivators driving the creation of new content by young people? Are those individuals who are creating their own content doing so "just for fun", or in order to share their creations? If the correlation between sharing and creating were scientifically proven, would our two countries be encouraged to rethink the way they promote the use of social networks to their citizens, their consumers and their companies?

Digital Natives, reinventing a world created by their predecessors

Will digital natives change the world through their consumer behaviour? Is the capacity to change the world still the prerogative of a small number of entrepreneurs and artists who are bolder, more rebellious and more ambitious than the general public—not to mention more active and more creative? The response to this question is difficult to quantify, but it is clear that the digital generation who have, to some extent, already seized power thanks to digital technologies[13] are not *digital natives*. It is not so much the *digital natives* as a *class of digital creatives* who are currently **driving the digital revolution in the cultural industries**.

Emerging on a submerged digital palette, where perfection has become fashionable

And yet the mass adoption of creative software by the general public may bring about a wide range of changes in the creative arts: on a qualitative level, it could trivialise technical perfection[14] and change the standards for the execution of artworks, either by continually pushing the boundaries of technical prowess[15] or by encouraging artists to stand out in ways other than through their technique (imagination, originality, repurposing, the introduction of random or imperfect elements to short-circuit the "coldness" of digital algorithms, etc.). From a quantitative perspective, original artistic works could be "diluted" by the extreme volume and continuously expanding flow of *casual* creations[16], possibly auto-generated by software more than created by humans, which nevertheless capture the attention of the public by focusing on their creators, who are themselves members of the general public[17].

The figures from our survey show that the **digital applications widely adopted by young people promote the sharing and creation of content** in **proportions** that could ultimately significantly alter the **scale and distribution** of the creative classes among the major continents[18].

Is the real factor that sets *digital natives* apart *ultimately* that they have been the petri dish for an emerging ***creative middle class***[19] **?** If a "creative middle class" is in fact emerging, what will its role be, and what influence will it have, in the development of culture and the economy in general? If the emergence of such a "middle class" of creative individuals were confirmed in 2013, what approach should we adopt to structure its growth, and how could we take advantage of this development for our collective cultural benefit?

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[13] Microsoft, Apple, Amazon, Google, Facebook etc.

[14] The calculation of shadows by software is progressively tending towards mathematical perfection

[15] This is a movement that we can always count on

[16] Referring to *casual games*, digital games accessible to everyone

[17] Creations available to the general public on social networks highlight the personality or the history of their creator (user), who is the important factor. The "work" itself is simply used to showcase the creator, and is generally short-lived.

[18] An effect of immigration, as theorised by Richard Florida, at least partially due to the empowerment of individuals as a result of digital technologies that offer migrants the opportunity to more easily exercise their creativity

[19] One of the *creative middle classes*

Key conclusions of the survey for the 2012 Forum d'Avignon

L'Atelier BNP Paribas

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