

# Teen Content Creators and Consumers

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**More than half of online teens have created content for the internet; and most teen downloaders think that getting free music files is easy to do.**

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# Summary of Findings

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## More than half of online teens are Content Creators.

Some 57% of online teens create content for the internet. That amounts to half of all teens ages 12-17, or about 12 million youth. These Content Creators report having done one or more of the following activities: create a blog; create or work on a personal webpage; create or work on a webpage for school, a friend, or an organization; share original content such as artwork, photos, stories, or videos online; or remix content found online into a new creation.

- The most popular Content Creating activities are sharing self-authored content and working on webpages for others.
- 33% of online teens share their own creations online, such as artwork, photos, stories, or videos.
- 32% say that they have created or worked on webpages or blogs for others, including those for groups they belong to, friends or school assignments.
- 22% report keeping their own personal webpage.
- 19% have created their own online journal or blog.
- About one in five internet-using teens (19%) says they remix content they find online into their own artistic creations.

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## 19% of online teens keep a blog and 38% read them.

Teens are much more likely than adults to blog and they are also more likely to read blogs. Blogs are a type of webpage, typically created and maintained with software that allows internet users to easily post material to a webpage, usually displaying the material in reverse chronological order with the newest items at the top.

- 19% of online youth ages 12-17 have created their own blog. That is approximately four million people.
- 38% of all online teens, or about 8 million young people, say they read blogs.
- 7% of adult internet users say they have created their own blog and 27% of online adults say they read blogs. (Note: Data for adult blog readers comes from the May-June 2005 Pew Internet Project Tracking Survey.)

This Pew Internet & American Life Project report is based on the findings of a callback telephone survey of a randomly generated sample of youth 12-17 and a parent or guardian. The data was gathered through telephone interviews conducted by Princeton Survey Research Associates between October 26 and November 28, 2004, among a sample of 1,100 parent-child pairs. For results based on the total parent or teen sample, one can say with 95% confidence that the error attributable to sampling and other random effects is +/- 3%. For results based on online teens or online parents, margin of sampling error is +/- 4%.

**Older girls lead the blogging activity among teens.**

- Older girls ages 15-17 are the most likely to blog; 25% of online girls in this age group keep a blog, compared with 15% of older boys who are online. About 18% of younger teens of both sexes blog.
- Teens who go online frequently are more than twice as likely to blog; 27% of daily users have their own blog, compared with 11% of those who go online several times a week, and 10% of those who go online less often.

**Teen bloggers are tech-savvy and heavy internet users.**

Bloggers and to a lesser extent teens who read blogs are a particularly tech-savvy group of internet users. They have more technological tools such as cell phones and PDAs and are more likely to use them to go online. Not only do they live in technologically rich households, but they are more likely to have their own computer at home and to be able to use it in a private space. They help adults do things online. Most strikingly, they have more experience with almost all online activities that we asked about. Bloggers are more likely than non-bloggers to engage in everyday online activities such as getting news, using IM or making online purchases, but content creating and sharing activities are the areas where bloggers are far ahead of non-bloggers.

<b>Bloggers Create &amp; Share All Kinds of Content</b>		
<i>Bloggers engage in content-creating, sharing, and remixing activities more than their non-blogging counterparts</i>		
<b>Have you...</b>	<b>Online teens who blog (n=179)</b>	<b>Online teens who do not blog (n=792)</b>
Shared content of your own creation, like drawings, stories, photos, or videos?	69%	24%
Remixed content that you found online like images, songs, or video into your own artistic creation?	35%	16%
Created a personal webpage?	58%	14%
Created or worked on a webpage for a friend, a group you are part of, or for a school project?	61%	25%

Source: Pew Internet & American Life Project survey of teens and parents, October-November 2004. Margin of error for teens is ±4%.

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### **Half of online teens say they currently download music files and close to one-third say they download video.**

- 51% of online teens say they download music files from the internet compared with 18% of online adults who were surveyed at the end of 2004.
- Roughly one-third of those teens (31%) who do not currently download music files say that they used to download music in the past. When projected on to the total population of online teens, this suggests that the total universe of teens with music downloading experience—those who are current or former downloaders—is about 66% of teen internet users.
- Nearly one-third (31%) of online teens say they currently download video files to their computer so they can play them at any time, while just 14% of online adults reported the same at the end of 2004.
- Older teen boys with broadband connections at home are the most likely to say they get music and video files online.

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### **Most teen downloaders think that getting free music is easy and it's unrealistic to expect people not to do it.**

Teens who get music files online believe it's unrealistic to expect people to self-regulate and avoid free downloading and file-sharing altogether. Out of the 622 teens in our survey who say they have tried music downloading, 75% agree with the statement that, "Music downloading and file-sharing is so easy to do, it's unrealistic to expect people not to do it." Just 23% disagreed with this statement.

About half of them think free downloading and file-sharing copyrighted content without permission is generally wrong, yet roughly the same number say they do not care about the copyright on the music files that they download.

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### **Teens are as likely now to have paid for music online as they are to have tried peer-to-peer services.**

Equal portions of music downloading teens admit to current use of peer-to-peer (30%) and current use of online music services such as iTunes (30%) to get their music files. However, three times as many teens report peer-to-peer use in the past (28%) as those who report use of paid services in the past (9%).

## Summary of Findings

<b>Teen Content Creators and Consumers: Summary of Findings at a Glance</b>
More than half of online teens are Content Creators.
19% of online teens keep a blog and 38% read them.
Older girls lead the blogging activity among teens.
Teen bloggers are tech-savvy and heavy internet users.
Half of online teens say they currently download music files and close to one-third say they download video.
Most teen downloaders think that getting free music is easy and it's unrealistic to expect people not to do it.
Teens are as likely now to have paid for music online as they are to have tried peer-to-peer services.
Source: Lenhart, A. and Madden, M. <i>Teen Content Creators and Consumers</i> . Washington, DC: Pew Internet & American Life Project, November 2, 2005.

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About the Pew Internet & American Life Project: The Pew Internet Project is a nonprofit, non-partisan initiative of the Pew Research Center 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](http://www.pewinternet.org)

About Princeton Survey Research Associates International: PSRAI conducted the survey that is covered in this report. It is an independent research company specializing in social and policy work. The firm designs, conducts, and analyzes surveys worldwide. Its expertise also includes qualitative research and content analysis. With offices in Princeton, New Jersey, and Washington, D.C., PSRAI serves the needs of clients around the nation and the world. The firm can be reached at 911 Commons Way, Princeton, NJ 08540, by telephone at 609-924-9204, by fax at 609-924-7499, or by email at: [ResearchNJ@PSRA.com](mailto:ResearchNJ@PSRA.com)

# Part 1.

## Teens as Content Creators

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### Online teens enjoy new opportunities to create, remix, and share digital content.

Thanks to the internet, American teenagers can engage media material and create their own content in ways their parents could not. Today's online teens live in a world filled with self-authored, customized, and on-demand content, much of which is easily replicated, manipulated, and redistributable. The internet and digital publishing technologies have given them the tools to create, remix, and share content on a scale that had previously only been accessible to the professional gatekeepers of broadcast, print, and recorded media outlets.

Frequent internet use is the norm among teenagers ages 12-17 in the U.S. Some 21 million teens (those ages 12-17) use the internet and half of them use the internet daily and another third use it once a week or more. Parents of online teens view the internet and email as a positive addition to their children's lives and teens are often the ones leading the technology adoption curve in their households. At the edge of this curve are "content-creation" activities such as blogging, file-sharing, and creating original content to post online, all of which are considerably more common practices among teens than among adults.

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### More than half of online teens are Content Creators.

More than half of all online teens who go online create content for the internet. Among internet-using teens, 57% (or 50% of *all* teens, roughly 12 million youth) are what might be called Content Creators. They report having done one or more of the following content-creating activities: create a blog; create a personal webpage; create a webpage for school, a friend, or an organization; share original content they created themselves online; or remix content found online into a new creation.<sup>1</sup>

**Content Creators** are online teens who have created or worked on a blog or webpage, shared original creative content, or remixed content they found online into a new creation.

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<sup>1</sup> Please note that the survey questions that yielded definition of "content creator" used in this report are different from the questions used to define content creators in the adult population in our Content Creation Online report from February 29, 2004.

## Part 1. Teens as Content Creators

Teen Content Creators say they have done an average of two content-creating activities of the five we included in the survey. Of the Content Creators, 45% have done one activity, and another 27% have done two. Sixteen percent of Content Creator teens have done three types of creating activities, and 10% have done four. Some 2% say they have done all five types of content creation activities.

There is little demographic variation between content creators and other online teens. Content Creators are more likely to have broadband internet access at home, which dovetails with previous Pew Internet Project research showing that adult broadband users are more likely than dial-up users to create content.<sup>2</sup> While 54% of Content Creator teens have broadband at home, 46% of other online teens report high-speed home access. And in a pattern that we see repeated in nearly all content-creating activities, teens who report going online more often are much more likely to report content-creating behavior.

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### **Urban, highly wired teens are more likely to share original artistic content.**

In the age of digital media, the possibilities for the manipulation of text, images, video, and audio files have increased dramatically. Teens and adults alike have embraced the ability to gather, chop, blend, and re-blend content to create new expressive materials. Teens are also taking advantage of the opportunities that the internet offers for publishing and sharing new creations or remixes. Younger Americans have grown up in a world of media forms that allow them to participate in the production as well as consumption of content, by allowing teens to create and share their own digital material.

One of the elements of our definition of media making is the sharing online of self-authored content. Overall, one-third (33%) of online teens report sharing their own artwork, photos, stories, or videos with others via the internet. There is some demographic variation in the population of teens who make and share their own media creations. Artistic Content Creators are slightly more likely to report living in urban areas; 40% of urban teens who use the internet say they create their own content, compared with 28% of suburban teens and 34% of rural teens.

Broadband access at home is also associated with the act of sharing of self-created content—more than a third (36%) of teen broadband users have shared original work they made themselves, while 28% of dial up users have done so.

In addition, those who use the internet frequently are more likely than less frequent internet users to create and share their own content. About two out of five (39%) daily internet users report sharing self-authored media, compared with about one in four (24%) of teens who go online several times a week.

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<sup>2</sup> Lenhart, Amanda. *Content Creation Online*, Pew Internet & American Life Project, February 29, 2004. [http://www.pewinternet.org/PPF/r/113/report\\_display.asp](http://www.pewinternet.org/PPF/r/113/report_display.asp)

## Part 1. Teens as Content Creators

<b>Demographics of Online Teens Who Share Self-Created Media</b>	
<i>The percentage of internet users in each group who share content they have created:</i> <i>[Note: statistically significant differences are highlighted in bold]</i>	
<b>Sex</b>	
Boys	31%
Girls	35
<b>Age</b>	
12-14	32%
15-17	34
<b>Family Income</b>	
Less than \$30,000 annually	36%
\$30,000 - \$49,999	35
\$50,000 - \$74,999	33
\$75,000 +	30
<b>Locale</b>	
Urban	<b>40%</b>
Suburban	<b>28</b>
Rural	34

Source: Pew Internet & American Life Project Teens and Parents Survey, Nov.-Dec. 2004. Margin of error is  $\pm 6\%$  for original content sharers.

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### When it comes to sharing self-authored creative content, older girls stand out.

While boys generally dominate downloading and file-sharing activity online, the act of creating and sharing self-authored content, such as artwork, photos, stories, or videos, is one arena where older girls lead. Just 29% of boys ages 15-17 share their own creative content online, compared with 38% of girls in that age group.

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### Like adults, some teens use content they find online as a palette for personal expression.

Teens are not content to consume online content passively. Some have joined the ranks of those who take material they find online—such as songs, text, or images—and remix that digital material into their own creations. About one in five internet-using teens (19%) say they are content remixers, as do 18% of online adults.<sup>3</sup>

Content remixing is equally prevalent across genders, ages, and socioeconomic groups. Surprisingly, dial-up and broadband teens remix at comparable levels, but teens who use the internet daily are more likely to mash and mix content than those who go online less than once per week.

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<sup>3</sup>Pew Internet & American Life Project January 2005 tracking survey.

## Part 1. Teens as Content Creators

<b>Demographics of Teen Remixers</b>	
<i>The percentage of internet users in each group who remix content they have found online into something new:</i>	
<i>[Note: None of the differences in this chart are statistically significant]</i>	
<b>Sex</b>	
Boys	21%
Girls	18
<b>Age</b>	
12-14	19%
15-17	20
<b>Family Income</b>	
Less than \$49,999 annually	21%
\$50,000+	20
<b>Locale</b>	
Urban	25%
Suburban	18
Rural	15

Source: Pew Internet & American Life Project Teens and Parents Survey, Nov.-Dec. 2004. Margin of error is  $\pm 8\%$  for remixers.

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### One in five online teens keeps a blog and 38% read them.

One in five online teens (19%), or roughly 4 million young Americans, have created their own blog. Blogs are a type of webpage, typically maintained with software that allows internet users to easily post material to the page, usually displaying content in reverse chronological order with the newest items at the top of the page.

For many online teens, blogs function as a personal (yet often publicly displayed) online journal that can be used as a forum for exchanges with friends, posting ideas, sharing personal experiences, and other content. Blogs are often authored with select audiences in mind, and millions of teens are reading them—38% of all online teens, or about 8 million young people, say they read blogs.

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### Teens surpass adults in blog keeping and reading.

Teens are more likely than adults to author or read blogs. While one teen in five keeps a blog, about 7% of adult internet users say the same. While close to two in five teens (38%) read blogs, only about a quarter (27%) of online adults do so.<sup>4</sup>

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### Older girls are most likely to blog.

As with other online communication activities, older girls again lead the charge into blogging in the teen cohort. A quarter (25%) of online girls ages 15-17 blog, compared

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<sup>4</sup> Pew Internet & American Life Project May-June 2005 tracking survey.

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with 15% of online boys of the same age. About 18% of younger teens of both sexes blog. Teens who go online frequently are also more likely to blog; 27% of daily users keep blogs, compared with 11% of those who go online several times a week and 10% of those who go online less often.

### **Bloggers are tech-savvy and intrepid internet explorers.**

Bloggers and to a lesser extent teens who read blogs are internet omnivores who explore, play with, utilize and generally inhabit the internet with a greater abandon than their less blog-savvy counterparts. They help adults do things online. They have more technological tools such as cell phones and PDAs and are more likely to use them to go online.

<b>Teen Bloggers: Intrepid Internet Explorers</b>		
<i>Blogging teens surpass their non-blogging counterparts for all but a select few online &amp; communicative activities:</i>		
	<b>Bloggers (n=179)</b>	<b>Non- Bloggers (n=792)</b>
Send or read email	96%	87%
Look for entertainment information	94	82
Send or receive instant messages	90	72
Get news or info about current events	84	74
College or University info	71	54
Political news	70	52
Send a text message using a cell phone	55	35
Buy things, such as books, clothing, or music	53	41
Look for health, dieting or fitness info	42	29
Look for a job online	39	28
Sensitive health information	37	19
<b>But for a few activities there is no statistically significant difference between bloggers and other teen internet users:</b>		
Play games online	82%	81%
Looking for religious or spiritual information online	31	25

Source: Pew Internet & American Life Project Teens and Parents Survey, Oct.-Nov. 2004. Margin of error is  $\pm$  4% for online teens and non-bloggers. Margin of error is  $\pm$  8% for bloggers.

Not only do they live in technologically rich households, but they are more likely to have their own computer at home and to be able to use it in a private space. Most strikingly, they have more experience with almost all online activities that we have asked about.

Blogging teens are more likely to have helped an adult do something online than non-blogging teens, this despite living in households with generally more tech-savvy parents. More than nine in ten, or (94%) of blogging teens report helping an adult do something online that they could not do themselves, while 79% of other teens report rendering similar assistance to an adult.

## Part 1. Teens as Content Creators

Teen bloggers are also more likely to have other technology than their non-blogging counterparts. Teen bloggers are more likely than non-bloggers to have a laptop computer (23% vs. 13%), a cellular phone (55% vs. 46%), and a personal digital assistant like a Palm Pilot, Sidekick, or Blackberry (13% vs. 6%.) Regular teens and bloggers are equally as likely to have a desktop computer at home.

Teen bloggers are also more likely to have home access from a private space in the home, with a third of bloggers (33%) reporting access from a private room, like a bedroom. In comparison, one-quarter of non-blogging teens have access from a private place.

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### **Blog readers are more prevalent in highly wired and high-income homes.**

Among teens who read blogs there are significant demographic differences from the overall online teen population. Teens from households with higher incomes (\$50,000 and up) and higher levels of parental education are more likely to read blogs than teens from low socioeconomic status homes. About 42% of teens in households earning more than \$50,000 annually report reading the blogs of others, compared with less than a third (30%) of teens from lower income households.

Teens from tech-savvy and highly wired homes are also more likely to read blogs than their less wired compatriots. More than two in five (42%) teens with long-wired parents—those parents who have been online for 6 or more years—read blogs, in contrast to the one-quarter (25%) of teens with parents who have been online for less than four years. Broadband internet access also appears to be related to blog reading—46% of online teens with broadband at home read the blogs of others, while only 31% of dial-up users say the same.

Girls are more likely than boys of similar ages to read the blogs of others. More than half (53%) of girls ages 15 to 17 read blogs, compared with 34% of boys in that age group. Fewer young teens read blogs compared with their older counterparts overall, with 31% of all 12- to 14-year-olds reporting blog reading, compared with 43% of teens ages 15 to 17.

Daily internet users are the most likely to read blogs, followed by those online several times a week. Infrequent internet users are the least likely to report ever having read a blog. Half of daily users report blog reading, while 30% of teens who go online several times a week read blogs, compared with just 11% of infrequent teen users.

Teens who report that they most often go online from home are also more likely to read blogs than those who favor other internet access locations. While 43% of these home users read blogs, 29% of teens who go online most often from school say that they read them.

## Part 1. Teens as Content Creators

<b>Demographics of Teen Bloggers</b>	
<i>The percentage of internet users in each group who blog:</i>	
<i>[Note: none of the differences between groups in this table are statistically significant]</i>	
<b>Sex</b>	
Boys	17%
Girls	22
<b>Age</b>	
12-14	18%
15-17	20
<b>Family Income</b>	
Less than \$49,999 annually	20%
\$50,000+	18
<b>Race/Ethnicity</b>	
White	19%
Black	17
Hispanic	17
<b>Locale</b>	
Urban	22%
Suburban	19
Rural	17

Source: Pew Internet & American Life Project Teens and Parents Survey, Nov.-Dec. 2004. Margin of error is  $\pm 8\%$ .

Blog readers tend to be more intense users of the internet than non-readers. They are less likely to have done most activities than bloggers, but more likely than non-readers to report having ever tried all online activities on our survey, with the exception of online gaming. All groups, bloggers, readers, and other internet users, report playing online games at the same levels.

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### **More than half of teen bloggers update once a week or more.**

How frequently are teens updating their blogs? More than half (57%) of teen bloggers update their blogs once a week or more, and nearly three in ten (29%) update at least three times a week. Drilling down into the data, we find a small, dedicated group of bloggers who update their blogs quite frequently—13% of teens post daily or more often and 16% of blogging teens update about 3 to 5 days a week. Close to another third (28%) say that they update their blogs once or twice a week. Another quarter update their blog every few weeks, and about 18% of teen bloggers post to their site less than that.

Given that the average teen's blog is not updated particularly frequently, it is not all that surprising that teens do not read blogs routinely, either. About 15% of online teen blog readers say they read once a day or more often. Another 15% say they read blogs 3 to 5 days a week, and 17% say they read 1 or 2 days a week. One in five teens who read blogs say they read them every few weeks and a third report reading them less often. All in all, nearly half of blog-reading teens are reading them less than once a week, and the other half weekly or more often.

**Blog reading usually stays within a teen’s personal network.**

While public discussion has raged about whether blogs constitute legitimate journalism or are a reliable source of information, for teens, blogs are much more about the maintenance and extension of personal relationships. When teens do read blogs, they mainly read the blogs of people they know. About 62% of blog-reading teens say they only read the blogs of people they know. The remaining group (36%) reports reading the blogs of both people they know and people they have never met. A mere 2% report only reading the blogs of people they do not know.

Teen bloggers blog for an audience of friends and peers and spend more time reading blogs in their friend network than outside of it. Many community-oriented blogging sites such as Live Journal report a user base that is heavily skewed towards younger users,<sup>5</sup> providing a medium for and active display of the intertwining of blogging, community and relationship-building among teens.

**Bloggers manipulate content by sharing and remixing.**

As mentioned previously, 19% of online teens, or about 4 million youth, report remixing content gathered from other sources into a new creation and a third (33%) report sharing original or remixed content with others online.

Blogging teens are more enthusiastic content creators, manipulators, and sharers than their non-blogging brethren. Teens who blog are more than twice as likely as non-bloggers to share content online of their own creation and to remix content that they have found elsewhere into something new. Close to seven in ten (69%) blogging teens have shared something online that they created themselves, such as artwork, photos, stories, or

<b>Bloggers Create &amp; Share All Kinds of Content</b>		
<i>Bloggers engage in content-creating, -sharing, and remixing activities more than their non-blogging counterparts</i>		
<b>Have you...</b>	<b>Teens bloggers (n=179)</b>	<b>Teens who do not blog (n=792)</b>
Shared content of your own creation, like drawings, stories, photos, or videos?	69%	24%
Remixed content that you found online like images, songs or video into your own artistic creation?	35%	16%
Created a personal webpage?	58%	14%
Created or worked on a webpage for a friend, a group you are part of, or for a school project?	61%	25%

Source: Pew Internet & American Life Project survey of teens and parents, October-November 2004. Margin of error for online teens as well as non-blogging teens is ±4%. Margin of error for bloggers is ±8%.

<sup>5</sup> See LiveJournal’s *Stats Page* in their Press Section: <http://www.livejournal.com/stats.bml>

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videos. By contrast, fewer than a quarter (24%) of non-bloggers has done the same.

More than a third (35%) of teen bloggers have taken content they found online such as songs, text, or images and remixed it into their own artistic creation. Only 16% of non-bloggers report similar remixing activities.

Blog readers are also more fervent users of the web than other teens, though less so than blog authors. Half of all teen blog readers (50%) report sharing something online that they created themselves, such as a story, artwork, photos, or videos. By way of comparison, only about a quarter (23%) of non-readers report similar sharing of creative works.

Blog readers are also a bit more likely than non-readers to have ever remixed content online. About a quarter of blog readers (26%) say they have taken content that they have grabbed elsewhere and remixed it into a new artistic creation, while only 16% of those who do not read blogs report the same.

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### Teens also create and maintain websites for others.

A fifth of online teens (22%) report keeping their own webpages, which is similar to the 24% of online teens who reported creating or working on their own webpage in our 2000 survey of teens and parents.<sup>6</sup> However, the growth of the overall online teen population means that the number of teens involved with creating or maintaining webpages has grown from about 4 million to about 5 million. Though technically blogs are a type of webpage, webpages generally tend to be more static, with less frequently updated content. Blogs, particularly those created through blog hosting web services, usually use templates to organize and simplify layout designs. Websites typically have more free-form layouts. A slightly larger group of online teens (32%) say that they have created or worked on webpages or blogs for others, including groups they belong to or friends, or for school assignments. Daily internet users are more likely than less frequent users to have built a personal webpage (31% vs. 12%), and more likely to have created a page for others. The differences in creating websites for others are less extreme, with 36% of daily users creating sites for others compared with 27% of less frequent users, though these differences are still statistically significant.

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<sup>6</sup> Lenhart, A., Lewis, O and Rainie, L. (2001) *Teenage Life Online*, Pew Internet & American Life Project, June 21, 2001. [http://www.pewinternet.org/PPF/r/36/report\\_display.asp](http://www.pewinternet.org/PPF/r/36/report_display.asp)

## Part 2.

### Teens as Content Consumers

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#### **Half of online teens say they download music.**

Teens enjoy a rich array of entertainment choices, spanning the spectrum from analog to digital offerings. As a Kaiser Family Foundation study recently noted, youth ages 8-18 devote most of their media consumption time to television, video, and DVD-watching—more than three hours each day. Still, listening to music, whether it is the radio, CDs, tapes, or MP3s, takes up the second-largest chunk of a teen’s media attention span on the average day.<sup>7</sup> Music holds a position of priority in teens’ lives, online as well as offline; in our survey, half of online teens (51%) said they download music from the internet.

In our 2000 survey of teens and internet use, roughly the same portion, 53% of online teens, reported music downloading. However, the raw size of the online teen population has grown over time such that there are now about 11 million teens who say they download music, up from 9 million in 2000.

Online teens are far more likely than online adults to say they have downloaded music files. Just 18% of online adults who were surveyed at the end of 2004 reported music downloading.

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#### **Older teen boys with broadband are the most likely to say they get music online.**

Among teens, boys ages 15-17 and those who have broadband access at home are among the most likely music downloaders. A full 67% of older boys who have access to high-speed connections at home get music online. By comparison, 58% of older girls in the high-speed category say they download music files. While 51% of all online girls ages 15-17 download music, 63% of all online boys of the same age get music files online. Similarly, just 44% of dial-up users report music downloading, while 61% of teens with high-speed connections at home report this.

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<sup>7</sup> Henry J. Kaiser Family Foundation, “Generation M: Media in the Lives of 8-18 Year-olds,” March 2005. It is worth noting here that the Kaiser study also asked a sample of 2,032 students ages 8-18 whether they have ever “downloaded music from the internet.” In all, 64% of all respondents said “yes.” This higher incidence of reported music downloading may be due to the broader range of ages sampled in the Kaiser study, the use of a self-administered paper-based survey, or different survey fielding periods. Full report available at: <http://www.kff.org/entmedia/7251.cfm>

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Overall, teen boys of all ages are more likely than teen girls to report music downloading, a trend that is consistent with our data from 2000. While 57% of all online teen boys say they get music files online, 45% of online teen girls say this. This is also similar to adult behavior. Online adult men are more likely than adult women to report music downloading in our surveys. However, other studies have suggested that girls are more voracious music consumers overall; the Kaiser “Generation M” study found that girls spend more time overall *listening* to music than boys (whether on radio, CDs, or MP3s).

As is the case with most online activities, there are more self-professed music downloaders among older teens (57%) than among younger teens (44%). Again, this is a trend that is consistent with our earlier data from 2000. There are no significant variations for this activity according to the parents’ income level, and there is little difference among teens whose parents have different educational backgrounds.

As we have previously reported, when respondents are asked if they ever download music files to their computer, some respondents report only current behavior and not past activity. As we did in our recent surveys of adults, we probed further in our survey of teens by asking a follow-up question: “You said you don’t currently download music files. Have you ever downloaded music files in the past?”

Roughly one-third of those teens (31%) who do not currently download music files say that they used to download music in the past. When projected on to the total population of online teens, this suggests that the total universe of teens with music downloading experience—those who are current or former downloaders—is closer to 66%.

<b>Current Downloader Crosstabs: Teens vs. Adults</b>								
<i>The percentage of internet users in each group who download music or video:</i>								
	<b>Music</b>				<b>Video</b>			
	<i>Online Teens N=971</i>	<i>Ages 12-14 N=445</i>	<i>Ages 15-17 N=526</i>	<i>Online Adults N=537</i>	<i>Online Teens N=971</i>	<i>Ages 12-14 N=445</i>	<i>Ages 15-17 N=526</i>	<i>Online Adults n=537</i>
Total	51%	44%	57%	18%	31%	26%	35%	14%
Male	57	49	63	20	38	33	42	17
Female	45	39	51	17	24	20	27	11
<b>Home Internet Users*</b>	N=885	N=439	N=446	N=475	N=885	N=439	N=446	N=475
Dial-up	44	35	54	16	27	25	30	10
High-speed	61	58	63	22	34	30	38	18

Source: Pew Internet & American Life Project Teens and Parents Survey, Oct.-Nov. 2004. Margin of error is  $\pm$  4% for all online teens,  $\pm$  5% for online teens ages 12-14, and  $\pm$  5% for those ages 15-17. Margin of error is  $\pm$  4% for online teens who are home internet users. The margin of error for teens ages 12-14 and those ages 15-17 who are home internet users is  $\pm$  5%. Data for adult internet users comes from the Pew Internet & American Life Project November 2004 Tracking Survey. Margin of error is  $\pm$  4% for all online adults and  $\pm$  5% for online adults who are home internet users.

Where indicated with (\*), the responses located in the “Teens” column are expressed according to parent-reported demographics.

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### **Like adults, teen downloaders get their music from multiple sources.**

Equal portions of teen and adult music downloaders cite peer-to-peer (P2P) networks as either a current source where they acquire files, or as a place where they have found their music in the past. Among current and former music-downloading teens, 30% say they currently get files from P2P networks, while 28% report doing so in the past. Likewise, 31% of adult music and video downloaders reported P2P as a current source in our February 2005 survey, while 27% of them said it was a formerly-used source. While P2P networks have been blamed for harboring much of the illegal music trading that happens online, some P2P applications have recently introduced features that allow users to legally share and buy music online.

Teen music downloaders are equally likely to cite paid online music services and P2P as current sources; 30% of music downloading teens say they currently download music files from online music services such as iTunes or BuyMusic.com. Yet, just 9% report using paid online music services in the past. That compares to 17% of adult music and video downloaders who reported current use of paid services and 7% who said they had tried them in the past.

As was the case when we reported adult downloaders' responses in the spring, the number of teens who cited email and instant messages as a way to get music files rivaled the number who cited P2P and paid services. While these platforms are not ideal for sharing files on a massive scale, high-speed connections and larger inboxes have made it feasible to transfer audio files via email and IM. And considering the frequency with which many teens use IM and email, they may simply use these applications as a matter of convenience for sharing songs.

Despite the fact that teens are heavier users of instant messaging applications than adults, teen music downloaders are equally as likely as adults to cite IM as a means of acquiring files. In all, 31% of music downloading teens said they currently get files from email or IM, while 6% said they used to do this. In comparison, 24% of music and video downloading adults reported email and IM as a current source for files and 5% said it was a way they used to get files in the past.

From another perspective, when we asked a pool of IM-using teens if they ever use instant messaging to send music or video files, 31% reported this behavior. That is more than six times the number of adult IM users (5%) who reported this activity in February of 2004.

About one in four (26%) music-downloading teens go straight to the source and get their music files from musicians' websites, online music magazines, and other music-related

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websites.<sup>8</sup> As we reported in our survey of musicians last year, most online musicians have websites, and many of them use it as a venue to promote their songs. Some choose to make selected audio files available to download for free while others make samples available or streaming audio versions of their music. And increasing numbers of musicians direct fans to buy song files through their website.

Another 8% of music-downloading teens say they used to seek music from musicians' pages and other music-related sites, but do not do so now. Music-downloading adults report similar behavior; one in five (20%) report getting song files from other music-related websites and 8% said it's something they have done in the past.

Online newsgroups and other online communities were the least-cited source for music files in our survey. Just 13% of music-downloading teens currently get music from these groups, and 6% said they had done so in the past. Likewise, 11% of downloading adults find music files they want to download in newsgroups and other online communities and 6% say they have in the past.

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### **Most teen downloaders think that getting free music is easy and it's unrealistic to expect people not to do it.**

While it is hard to know how many teenagers are downloading music files and other media files illegally or legally, we did get a good sense of where their attitudes stand with regard to free music downloading and file-sharing online. Simply put, teens who get music files online believe it is unrealistic to expect people to self-regulate and avoid free downloading and file-sharing altogether. About half of them think free downloading and file-sharing copyrighted content without permission is generally wrong, yet roughly the same number say they do not care about the copyright on the music files that they download.

Out of the 622 teens in our survey who say they have tried music downloading, 75% agree with the statement that, "Music downloading and file-sharing is so easy to do, it's unrealistic to expect people not to do it." Just 23% disagreed with this statement.

A smaller majority think that there is a balance to be struck between buying your entertainment and getting it for free. When asked if they agree or disagree that, "As long as people are still buying music and movies, it's okay if they download or share some things for free," 66% said they agreed with this statement and 33% disagreed.

Presented with a third scenario that more specifically cited the act of downloading and sharing copyrighted material, these teens were split in their views. In all, 52% said they agreed that, "It's never really okay to download music or share copyrighted files online without paying for them or getting permission," while 47% disagreed with this statement.

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<sup>8</sup> Madden, M. "Artists, Musicians and the Internet," Pew Internet & American Life Project, December 5, 2004. Full report available at: [http://www.pewinternet.org/PPF/r/142/report\\_display.asp](http://www.pewinternet.org/PPF/r/142/report_display.asp)

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However, when asked specifically about their own behavior, teens have a more laissez-faire attitude. Among teen music downloaders (either current or former), the majority (55%) say they do not care much whether the songs they download are copyrighted. This falls in line with the attitudes of music-downloading adults in our February 2005 survey, 58% of whom said they do not care about the copyright on the files they download.

Teens' views on free music downloading and file-sharing vary little according to their gender or the type of internet connection they use at home. However, older teens are significantly more likely than younger teens to agree that it is unrealistic to expect people to refrain from getting free music online. Similarly, they are less likely to put their foot down and say that free music downloading and sharing of copyrighted files without permission is never okay.

It is worth restating here that the above questions were only asked of music downloading teens who have some experience with getting music online. This group likely includes a mix of teens who have downloaded illegally, some who have only accessed files legally, and some who have done both. Had we asked this question of those teens who have no familiarity with music downloading, they might have expressed quite different views about the activity.

<b>Teen Attitudes Towards Free Music Downloading and File-sharing</b>							
<i>The percentage of teen music downloaders in each group who agree with the following statements:</i>							
	All	Boys	Girls	12-14	15-17	Broadband in home	Dial-up
Music downloading and file-sharing is so easy to do, it's unrealistic to expect people not to do it.	75%	76%	74%	<b>60%</b>	<b>85%</b>	77%	69%
As long as people are still buying music and movies, it's okay if they download or share some things for free.	66	67	63	63	67	63	65
It's never really okay to download music or share copyrighted files online without paying for them or getting permission.	52	49	56	<b>60</b>	<b>47</b>	50	57

Source: Pew Internet & American Life Project Teens and Parents Survey, Oct.-Nov. 2004. Margin of error is  $\pm$  4% for all online teens. Statistically significant differences are noted in **bold** numbering.

In focus groups we conducted with 38 middle school and high school students ages 11-17, participants expressed mixed views about free music downloading.<sup>9</sup> Some revealed wariness about the consequences of downloading and sharing copyrighted songs, but others felt confident about continuing under the radar. While one male focus group participant said music downloading is “a little scary now because of how many people have been getting caught,” another said he “does not worry about it” because he uses a program to get songs where “other people cannot see what songs you have.”

<sup>9</sup> For more information regarding the focus groups, please see the Methodology section of this report.

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Since 2003, the Recording Industry Association of America has filed 14,800 lawsuits against individual internet users suspected of illegally downloading and distributing copyrighted music online. While many of these suspected infringers have settled out of court, recent news reports have noted that increasing numbers of these defendants are starting to challenge the accusations. A Supreme Court decision in the *MGM v. Grokster* case earlier this year ruled unanimously against Grokster, finding that the company was guilty of inducing copyright infringement among its users. Since that ruling, some P2P companies have sought to collaborate with the record industry to find new legal ways to distribute files through P2P applications for profit. At the same time, there are many alternative P2P applications and other means to acquire copyrighted content online, should one wish to do so.

The impression that “everyone’s doing it” was expressed repeatedly in one focus group, and several participants offered that they simply switch to new file-sharing applications whenever one becomes too popular and copyright holders start “cracking down” on them. When asked to share their views about the music industry’s opposition to unauthorized downloading, several participants felt that they receive mixed messages as consumers when they are sold CD burners, DVD burners, and blank CDs.

Beyond the threat of getting caught, concerns about the risk of unwanted viruses, spyware, and the poor quality of files found on the peer-to-peer networks were also a popular thread in the discussions. Here again, however, the teens who had become frustrated with certain peer-to-peer applications for these reasons said most people just move on to use new software or other methods to acquire songs when they encounter these problems.

Yet, despite the acceptance of free downloading as a norm, few of the participants expressed a complete reluctance to buy music altogether. One participant said she downloads to sample music, and will buy from those artists she really enjoys: “I think that if I find a band that I like, I’ll buy their CD because they have some songs that are not on the internet. And I think the quality on the CDs is still better than the quality after it’s been through a couple of computers.”

Another male participant shared a similar perspective on free downloading: “There’s some CDs that there’s like a couple of songs that you just want but you are not going to pay the \$15.00 for a CD when there’s only like two songs, so that’s when downloading comes in handy.”

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### **Teens are twice as likely as adults to report video downloading.**

While the rift is not quite as large as it is for digital music consumption, teens currently outpace adults in video downloading by two to one. Nearly one-third (31%) of online teens say they download video files to their computer so they can play them at any time, while just 14% of online adults reported the same in a separate November survey.

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Again, older boys, ages 15-17, who have broadband connections at home lead as the power consumers in this category. A full 45% of them report video downloading, compared with just 28% of older girls with high-speed connections.

In general, boys of all ages are more likely than girls to get video files; 38% of online boys and 24% of online girls say they are video downloaders. Likewise, older teens of both genders surpass younger teens in video downloading; 35% of those ages 15-17 get video files online, while just 26% of 12-14 year-olds do this.

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### Most who download video share files, too.

The majority of teens who download video, 61%, also say that they share files (such as music, video, picture files, or computer games) from their computer with others online. Among music downloading teens, 52% report some type of file-sharing. Overall, 37% of online teens report sharing files with others online, compared with 24% of online adults.

Teens who have a high-speed connection at home share files in greater numbers than teens who use a dial-up connection; 40% of broadband teens share files, while 30% of dial-up teens do so. More boys share files than girls (42% vs. 33%), and older teens have a head start on file-sharing relative to their younger teen counterparts (42% vs. 32%).

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### Bloggers care more about copyright than non-bloggers do.

Similar to music downloaders, bloggers are somewhat more likely than non-bloggers to say that they care whether or not the music they download is copyrighted. Perhaps in keeping with their status as creators of their own content, more than half (52%) of bloggers say they do care about copyright, while 37% of non-bloggers report concern over the copyright status of the music files they download.

Bloggers generally have similar attitudes as non-bloggers toward free music downloading and file-sharing. Most feel that downloading is so easy to do that it is unreasonable to expect people not to do it. However, like most teen internet users, about half of bloggers think that it is never really okay to download or share files without paying for them or getting permission. Surprisingly, bloggers are slightly less likely to say that downloading is okay as long as people are still buying music and movies; just 59% of bloggers agree with this conditional statement compared with 68% of non-bloggers.

When it comes to downloading music, bloggers are just as likely as non-bloggers to say they currently download music files (57% vs. 50%, a gap which is not statistically significant in this data set), and are somewhat more likely to say they currently downloaded video files (43% vs. 28%). However, when we look at bloggers who have either downloaded music *or* video, bloggers are more likely to have done at least one of these downloading activities, with 65% of bloggers reporting downloading music or videos and 55% of non-bloggers saying the same. Additionally, 50% of bloggers who say

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they do not currently download music have downloaded in the past, meaning that approximately 78% of all bloggers are current or former music downloaders. About a quarter of internet users who do not blog say they have downloaded music in the past. As noted previously, about two-thirds of all online teens are current or former music downloaders.

Behaviorally, bloggers are just as likely as non-bloggers to download music from a peer-to-peer networks or online music services. About a third of bloggers (32%) report current peer-to-peer usage, another 30% report past use, and 39% report that they have never used the services. Non-bloggers show similar percentages (30% current, 27% past, 42% never). Similarly, 28% of bloggers have used iTunes or other music services, 13% report past usage, and 60% say they have never purchased music from an online music service. Non-bloggers are similarly split; 31% report downloading from paid services, 8% report past service usage, and 60% say they have never used an online music service.

# Methodology

The Parents & Teens 2004 Survey sponsored by the Pew Internet and American Life Project obtained telephone interviews with a nationally representative sample of 1,100 teens ages 12-17 and their parents living in continental United States telephone households. The interviews were conducted in English by Princeton Data Source, LLC, from October 26 to November 28, 2004. Statistical results are weighted to correct known demographic discrepancies. The margin of sampling error for the complete set of weighted data is  $\pm 3.3\%$ .

Four focus groups were also conducted with a total of 38 high school and middle school students. Amanda Lenhart, Christina Fiebich, and Kelli Burns moderated the focus groups. Groups were audio- or videotaped and the participants were offered an incentive of two movie passes to a local theater. A short online survey was administered to each participant prior to the focus group.

Three of the focus groups were predominately high schoolers and one consisted of middle school students. 66% of the participants were boys, 34% were girls. No race or ethnicity data was collected from the participants. Ages ranged from 11 to 17. Two focus groups drew from predominately suburban and urban populations and two from predominately small town or rural/exurban populations.

A total of 9 teens took an online survey of multiple choice, open-ended and short-answer-style questions that covered many of the same themes addressed in the focus groups. While no statistical data collected in this survey is used here, some open-ended responses by the teen respondents may be included in this report. The sample was collected by the snowball method and is not representative.

Details on the design, execution, and analysis of the telephone survey are discussed below.

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## Design and Data Collection Procedures

### Sample Design

The sample was designed to represent all teens aged 12 to 17 in continental U.S. telephone households. The sample is also representative of parents living with their teenage children.

The telephone sample was pulled from previous PIAL projects fielded in 2004 and 2003. Households with a child age 18 or younger were called back and screened to find 12- to 17-year-olds. The original telephone samples were provided by Survey Sampling International, LLC (SSI) according to PSRAI specifications. These samples were drawn using standard *list-assisted random digit dialing* (RDD) methodology.

### Contact Procedures

Interviews were conducted from October 26 to November 28, 2004. As many as 10 attempts were made to contact every sampled telephone number. Sample was released for interviewing in replicates, which are representative subsamples of the larger sample. Using replicates to control the release of sample ensures that complete call procedures are followed for the entire sample.

Calls were staggered over times of day and days of the week to maximize the chance of making contact with potential respondents. Each household received at least one daytime call in an attempt to find someone at home. In each contacted household, interviewers first determined if a child age 12 to 17 lived in the household. Households with no children of the proper age were deemed ineligible and screened out. In eligible households, interviewers first conducted a short interview with a parent or guardian. Then interviews were conducted with the target child.<sup>10</sup>

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### Weighting and Analysis

Weighting is generally used in survey analysis to compensate for patterns of nonresponse that might bias results. The interviewed sample was weighted to match national parameters for both parent and child demographics. The parent demographics used for weighting were: sex; age; education; race; Hispanic origin; marital status; and region (U.S. Census definitions). The child demographics used for weighting were gender and age. These parameters came from a special analysis of the Census Bureau's 2003 Annual Social and Economic Supplement (ASEC) that included all households in the continental United States that had a telephone.

Weighting was accomplished using Sample Balancing, a special iterative sample weighting program that simultaneously balances the distributions of all variables using a statistical technique called the *Deming Algorithm*. Weights were trimmed to prevent individual interviews from having too much influence on the final results. The use of these weights in statistical analysis ensures that the demographic characteristics of the sample closely approximate the demographic characteristics of the national population. Table 1 compares weighted and unweighted sample distributions to population parameters.

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<sup>10</sup> In households with more than one 12- to 17-year-old interviewers asked parents about, and conducted interviews with, a child selected at random.

Table 1: Sample Demographics

	<u>Parameter</u>	<u>Unweighted</u>	<u>Weighted</u>
<b><u>Census Region</u></b>			
	Northeast	18.6	16.9
	Midwest	22.6	27.0
	South	35.7	36.5
	West	23.1	19.6
<b>Parent's Sex</b>			
	Male	44.2	41.4
	Female	55.8	58.6
<b>Parent's Age</b>			
	LT 35	10.2	8.7
	35-39	20.7	15.7
	40-44	29.4	29.1
	45-49	23.7	26.2
	50-54	11.2	12.5
	55+	4.7	7.9
<b>Parent's Education</b>			
	Less than HS grad.	13.4	4.4
	HS grad.	35.5	30.0
	Some college	23.3	27.1
	College grad.	27.7	38.5
<b>Parent's Race/Ethnicity</b>			
	White, not Hispanic	67.5	82.3
	Black, not Hispanic	11.3	8.7
	Hispanic	15.3	5.1
	Other race, not Hispanic	5.8	3.9
<b>Parent's Marital Status</b>			
	Married	83.3	80.0
	Not married	16.7	20.0
<b>Kid's Sex</b>			
	Male	50.7	50.0
	Female	49.3	50.0
<b>Kid's Age</b>			
	12	16.7	17.1
	13	16.7	14.9
	14	16.7	16.5
	15	16.7	17.8
	16	16.7	17.3
	17	16.7	16.4

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## Effects of Sample Design on Statistical Inference

Post-data collection statistical adjustments require analysis procedures that reflect departures from simple random sampling. PSRAI calculates the effects of these design features so that an appropriate adjustment can be incorporated into tests of statistical significance when using these data. The so-called "design effect" or *deff* represents the loss in statistical efficiency that results from systematic non-response. The total sample design effect for this survey is 1.26.

PSRAI calculates the composite design effect for a sample of size  $n$ , with each case having a weight,  $w_i$  as:

$$deff = \frac{n \sum_{i=1}^n w_i^2}{\left( \sum_{i=1}^n w_i \right)^2} \quad f$$

In a wide range of situations, the adjusted *standard error* of a statistic should be calculated by multiplying the usual formula by the square root of the design effect ( $\sqrt{deff}$ ). Thus, the formula for computing the 95% confidence interval around a percentage is:

$$\hat{p} \pm \left( \sqrt{deff} \times 1.96 \sqrt{\frac{\hat{p}(1-\hat{p})}{n}} \right) \quad f$$

where  $\hat{p}$  is the sample estimate and  $n$  is the unweighted number of sample cases in the group being considered.

The survey's *margin of error* is the largest 95% confidence interval for any estimated proportion based on the total sample—the one around 50%. For example, the margin of error for the entire sample is  $\pm 3.3\%$ . This means that in 95 out every 100 samples drawn using the same methodology, estimated proportions based on the entire sample will be no more than 3.3 percentage points away from their true values in the population. It is important to remember that sampling fluctuations are only one possible source of error in a survey estimate. Other sources, such as respondent selection bias, questionnaire wording and reporting inaccuracy, may contribute additional error of greater or lesser magnitude.

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## Response Rate

Table 2 reports the disposition of all sampled callback telephone numbers ever dialed. The response rate estimates the fraction of all eligible respondents in the sample that were

ultimately interviewed. At PSRAI it is calculated by taking the product of three component rates:<sup>11</sup>

- Contact rate – the proportion of working numbers where a request for interview was made – of 86 percent<sup>12</sup>
- Cooperation rate – the proportion of contacted numbers where a consent for interview was at least initially obtained, versus those refused – of 69 percent
- Completion rate – the proportion of initially cooperating and eligible interviews that agreed to the child interview and were completed – of 83 percent
- Thus the response rate for this survey was 49 percent.<sup>13</sup>

**Table 2: Sample Disposition**

Total Numbers dialed		7708	
Business		109	
Computer/Fax		153	
Other Not-Working		1156	
Additional projected NW		120	
	Working numbers	6170	80.0%
No Answer		26	
Busy		15	
Answering Machine		451	
Callbacks		235	
Other Non-Contacts		118	
	Contacted numbers	5325	86.3%
Refusals		1669	
	Cooperating numbers	3656	68.7%
No child in HH		2230	
Language Barrier		98	
	Eligible numbers	1328	36.3%
Interrupted		228	
	Completes	1100	82.8%
	Response Rate		49.1%

<sup>11</sup> PSRAI’s disposition codes and reporting are consistent with the American Association for Public Opinion Research standards.

<sup>12</sup> PSRAI assumes that 75 percent of cases that result in a constant disposition of “No answer” or “Busy” over 10 or more attempts are actually not working numbers.

<sup>13</sup> The response rates for the original surveys that provided the callback sample averaged approximately 32 percent.