

Veldkamp Market Research

COPYING AT WORK

- **Photocopying of documents subject to repro rights in the Dutch business community**

An investigation into the photocopying of documents subject to repro rights in the Dutch business community, carried out by order of 'Stichting Reprorecht' (Reprographic Reproduction Rights Foundation).

Project Number: 3069

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1. Preface

The 2002 Law Gazette, 186 incorporates the Law of 28th March 2002, which changes the Authors Law of 1912 with reference to reprographic multiplication, whereby new legislation regarding photocopying by businesses is introduced. The law took effect on 1st February 2003 and since that time the necessary decisions have also been made and come into force.

In anticipation of this amendment of the law, Stichting Reprorecht and VNO-NCW already formed a joint working group back in 1999 to supervise and assist with an investigation by Stichting Reprorecht into the photocopying of documents subject to repro rights in the Dutch business community. The most important objective of this investigation is to provide some level of clarity regarding the volume of copying and to decide which part of this volume is subject to repro rights and which part isn't.

Photocopying the following type of information is subject to repro rights, providing it is intended for business use:

- Scientific information
- Trade and practical information
- Information from newspapers, magazines and newsmagazines
- Information from other general interest magazines
- Educational books
- General books

Photocopying this type of information is not subject to repro rights if it is (strictly) used for private purposes.

Various different investigative agencies provided approach suggestions in a pilot study conducted prior to the current investigation. Eventually, in consultation with the VNO-NCW supervisory working group, it was decided that the method used by Veldkamp was the method to be used for collecting the required information. This method estimates copying volumes in the various sectors and size groups, based on the copying behaviour of individual employees.

The investigation purely looked into the so-called reprographic multiplication, the photocopying "from paper to paper". Electronic copying (prints, scans, etc) has not been included in this specific investigation. Ten sectors and two size groups have been differentiated between.

This report describes the results of the investigation. To start with, Chapter 2 looks at the fieldwork and the method used. Chapter 3 looks at the copying volumes during the week investigated. Chapter 4 subsequently looks at the part of this volume which is subject to repro rights both per sector and per size group. Based on the information gathered from the week investigated, Chapter 5 estimates the copying volume in 2002 and the part of this which is subject to repro rights. [Chapter 3-5 are not included in this translation]. The report concludes with a summary of the most important results.

2. METHOD OF DATA COLLECTION

2.1 Method

In contrast to what is usual in this type of investigation, we didn't opt for a 'company entry' for the data collection, i.e. asking the person responsible in the company for the copying volumes. We therefore opted for a personal entry, whereby we asked people employed by companies to keep a log of their personal copying behaviour and the copying assignments they have given to others during a working week.

In order to measure the copying behaviour as accurately as possible, the respondents were provided with five different forms, which they used to keep a log of the number and type of photocopying they did per weekday. The form asked for information regarding the photocopying they did *themselves* and the photocopying they asked others to do. Photocopying done *by order of* others did not need to be filled in on the form. This ensured specific types of photocopying would not be counted twice: both by those giving the order to photocopy as well as those doing the actual photocopying. A conscious choice was made to let the person giving orders to photocopy keep a log (and not the person being ordered to do the photocopying), as this person is probably better equipped to judge what has actually been copied.

To further increase the reliability and validity, the investigation wasn't introduced as an investigation into copying behaviour, but an investigation into 'the use of various sources of information at work'. The questions were placed in a much broader context amidst all manner of other questions regarding work.

One advantage of the individual approach is that the results are based on actual behaviour instead of estimates of this type of behaviour. This applies both to copying volumes as well as to the material being copied. In addition to this, with an individual approach we see fewer distortions as a result of the importance some companies attach to the results of the investigation: a levy doesn't really affect an individual employee, however it would affect a company.

With a company entry, a fairly high percentage of those questioned would not be able to accurately estimate the copying volumes and therefore end up in a 'don't know' category, which in turn affects the reliability of the estimates. With an individual approach, based on actual behaviour, such distortions do not occur.

The estimates in this report are therefore based on:

- A precise description on forms per day
- Therefore a detailed measurement of behaviour without memory loss, therefore no 'I don't know'
- A registration of photocopying people have done themselves and have asked others to do, photocopying done for others does not count
- Based on a wider context and neutral introduction
- Completion without direct importance attached to higher/lower outcome
- Completion at home, therefore no pressure from manager/director/colleagues

2.2. Sector division

The investigation is carried out in ten sectors and two size groups within the Dutch business community. A sector division as used by NIPO has been assumed. The following sectors have been differentiated between:

- Industry, production
- Building industry, building installations
- Food retail trade
- Non-food retail trade
- Wholesale, distributive trade
- Catering
- Cars, repairs, garages
- Transport, storage & communication
- Bank and insurance bodies
- Other business services

This division is completely interchangeable with other sector divisions. The BIK codes per sector have been included as an appendix to this report (appendix 3) [not included in this translation].

The target group of this investigation are companies obliged to register with the Chamber of Commerce. Government, healthcare, self-employed professionals, education, non-profit organisations, corporations and associations have been excluded for the time being, even though the investigation may well be extended into those sectors in the future. No observations were made in the agriculture and fishing sectors. Both sectors only employ a small number of people, whereby the copying volume is expected to be low.

2.3 Fieldwork

CAPI@HOME was chosen for carrying out the fieldwork, an access panel of our subsidiary NIPS, which consists of around 60.000 people who participate with investigations via a computer with a modem connection. Those people have been recruited via classic methods, i.e. not the internet. The only requirement is that the household has a pc with modem connection. All members of the household may be approached to participate with the investigation. The questionnaires are completed offline and the respondents will be rewarded for their cooperation.

With the exception of the observations in other business services, the fieldwork was carried out in May 2002. The information regarding the business services was collected during the pilot study in October 2001, for the benefit of this investigation. This concerned an investigation which has been carried out in the exact same way as this investigation, which meant the results of this sector were comparable to those of other sectors and could therefore be integrated into this investigation.

During a screening conducted prior to the fieldwork, panel members were asked if they were employed and if so, in which sector. Screening of people employed in the other business services took place in October 2001 and people employed in other sectors in April 2002. In addition to the sector, people were asked about the size of the company

(at site level) and whether they were prepared to keep a log of the amount of photocopying they did for a working week. A total of 25.848 people were screened; 13.129 people were prepared to participate with the investigation. A random group of people were taken from this number of people, with stratification towards the sector and the number of people employed per company location. The same amount of people did not appear to be available across all sectors and size groups. The gross random number of people consisted of 3.815 respondents. The following overview shows the division across sectors and size groups.

Table 2.1 Gross random group of people surveyed per sector per size group

	1-49 employees	50+ employees	TOTAL
Industry, production	251	400	651
Building industry, building installations	228	193	421
Food retail trade	146	124	270
Non-food retail trade	311	89	400
Wholesale, distributive trade	209	146	355
Catering	138	56	194
Cars, repairs, garages	80	18	98
Transport, storage & communication	172	279	451
Bank and insurance bodies	130	200	330
Other business services	257	388	645
TOTAL	1.922	1.893	3.815

The participants were sent five different forms to keep a log of their photocopying activities at work in the period from 13th to 17th May 2002. For people employed in the other business services sector, this concerned the period 24th to 28th October 2001. Both working weeks were made up of five working days without public holidays. The set of forms was sent out by post together with relevant accompanying information. The information explained the various categories people could divide the photocopying into. Both this form and the information have been included in this report as appendices (appendices 1 and 2). The respondents entered the results of the form onto the computer during the weekend following the working week and answered a number of additional questions regarding this subject.

As stated in the preface (chapter 1), six types of photocopying are subject to repro rights. In order to obtain a detailed insight into some of the subcategories, an additional investigation was carried out amongst around 300 respondents. This investigation was carried out in the exact same way as the main investigation, the only difference being the following subcategories were differentiated between: (a) brochures, leaflets, annual reports, reports, (b) educational books and (c) general books.

The results of this detailed study have been integrated in the main investigation and included in the amounts presented in this report. We would like to refer you to appendix 4 for a more detailed description of this additional investigation.

2.4 Response

A photocopying log was kept for a week by 2.884 respondents, who also completely filled out the questionnaire. After further analysis it appeared that 10 people also logged photocopying they were doing by order of someone else. These people were removed from the survey. The following table shows the response information.

Table 2.2 Response

	1-49 employees		50+ employees		TOTAL	
	abs	%	abs	%	abs	%
Industry, production	190	76	313	78	503	77
Building industry, building installations	166	73	146	76	312	74
Food retail trade	107	73	97	78	204	76
Non-food retail trade	219	70	69	78	288	72
Wholesale, distributive trade	164	78	114	78	278	78
Catering	97	70	43	77	140	72
Cars, repairs, garages	65	81	10	56	75	77
Transport, storage & communication	118	69	216	77	334	74
Bank and insurance bodies	106	82	157	79	263	80
Other business services	193	75	284	73	477	74
TOTAL	1.425	74	1.449	77	2.874	75

Considering the amount of effort required by the participants, an average response rate of 75% can be considered high.

2.5 Evaluation

In order to be able to draw conclusions based on the copying behaviour across the sectors as a whole, the results had to be looked at subjectively. First the representation of the random group of people surveyed *within* the various sectors was looked at. Corrections were then made for two different variables of deviations connected to the copying behaviour, namely the education level of those surveyed and the number of hours people are employed per week. The standard information per sector used is derived from an estimate of the employed population by the CBS (2000). Table 2.3 and 2.4 show these standard details and the frequencies in the random group of people surveyed after evaluation.

Table 2.3 Educational level per sector in accordance with the CBS information and in the evaluated random group of people surveyed (stp). For example: The percentage of people with a lower level of education in the industry is 34%, 44% have followed an intermediary education and 21% have had a higher education. The evaluated random group of people surveyed does not deviate from the CBS standard.

(Table 2.3)	Lower Education		Intermediary Education		Higher Education		No information	
	CBS %	stp %	CBS %	stp %	CBS %	stp %	CBS %	stp %
Industry, production	34	34	44	44	21	21	0	0
Building industry, building installations	40	39	52	51	8	8	0	1
Food retail trade	34	34	53	53	13	13	0	1
Non-food retail trade	26	26	59	59	15	15	0	1
Wholesale, distributive trade	23	23	50	50	26	26	0	0
Catering	32	31	48	48	20	20	0	0
Cars, repairs, garages	33	31	57	58	9	10	0	1
Transport, storage & communication	31	31	43	43	25	25	0	1
Bank and insurance bodies	5	4	48	47	48	48	0	0
Other business services	13	11	32	27	55	46	0	16
TOTAL	27	26	45	45	28	26	0	4

Table 2.4 The number of hours employed per week per sector in accordance with the CBS information and in the evaluated random group of people surveyed. For example: The percentage of employees with a full-time job in the industry is 83%. The evaluated random group of people surveyed deviates from the CBS standard by 1%.

	Up to 19 hours		20 to 35 hours		More than 35 hours		No information	
	CBS %	stp %	CBS %	stp %	CBS %	stp %	CBS %	stp %
Industry, production	3	3	14	14	83	82	0	1
Building industry, building installations	2	2	8	8	91	90	0	1
Food retail trade	27	26	28	27	45	45	0	1
Non-food retail trade	15	15	29	28	56	55	0	2
Wholesale, distributive trade	4	4	13	13	83	82	0	0
Catering	18	18	27	26	55	53	0	3
Cars, repairs, garages	4	4	13	14	83	81	0	1
Transport, storage & communication	6	5	16	15	79	78	0	1
Bank and insurance bodies	5	5	18	18	77	77	0	1
Other business services	6	5	20	17	74	62	0	16
TOTAL	7	7	17	17	76	73	0	4

After consideration of the educational level and the number of hours people work per week, the random group of people surveyed per sector can be considered as representative where these variables are concerned.

We subsequently looked at the relationships between the various sectors and a split into size groups. This evaluated the number of individuals surveyed per sector and per size group in accordance with the total number of employees in that sector and size group. The NIPO (1999) Business Monitor was used as the standard. This is a large scale corporate study which surveys 20.000 company sites on an annual basis. The reason for opting for this standard compared to, for example, Chamber of Commerce information, is twofold:

- The Business Monitor information is based on company sites and not organisations. This is more suitable for obtaining detailed information; head offices are generally not able to provide details on behalf of the entire organisation.
- A considerable number of companies registered with the Chamber of Commerce do not have any actual corporate activities: this includes inactive limited companies or companies which have ceased trading (you do not have to deregister from the Chamber of Commerce). The Business Monitor only looks at companies where actual business activities take place.

Based on the NIPO Business Monitor, there are 590.951 company sites in the sectors we have highlighted. This estimate has strong similarities with the CBS and LISA estimates.

We have estimated the company population according to sector and size group based on this standard information. The population estimates are used to determine the number of people employed per sector and per size group.

Table 2.5 Estimate of the number of sites and the number of people employed in ten sectors according to two size groups

	1-49 employees		50+ employees		TOTAL	
	sites	people	sites	people	sites	people
Industry, production	45.519	306.115	3.604	659.914	49.123	966.029
Building industry, building installations	59.883	282.117	2.009	274.103	61.892	556.280
Food retail trade	27.204	144.841	540	46.364	27.744	191.205
Non-food retail trade	121.221	428.304	500	57.578	121.721	485.882
Wholesale, distributive trade	69.821	366.016	1.367	190.058	71.188	556.074
Catering	43.099	197.951	290	35.534	43.389	233.485
Cars, repairs, garages	16.566	85.635	140	29.133	16.706	114.768
Transport, storage & communication	24.903	140.687	1.253	164.963	26.156	305.650
Bank and insurance bodies	10.598	67.131	781	164.258	11.379	231.389
Other business services	159.295	622.961	2.358	300.183	161.653	923.144
TOTAL	578.109	2.641.818	12.842	1.922.088	590.951	4.563.906

This information was subsequently used to evaluate the respondents for this investigation per sector and per size group according to the total number of employees in that sector and size group. The copying behaviour was determined based on the evaluated information. The next chapters look at the results in a little more detail [not included in this translation].

6. The most important results

The 2002 Law Gazette, 186 incorporates the Law of 28th March 2002, which changes the Authors Law of 1912 with reference to reprographic multiplication, whereby new legislation regarding photocopying by businesses is introduced. The law took effect on 1st February 2003 and since that time the necessary decisions have also been made and come into force.

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Various different investigative agencies provided approach suggestions in a pilot study conducted prior to the current investigation. Eventually, in consultation with the VNO-NCW supervisory working group, it was decided that the method used by Veldkamp was the method to be used for collecting the required information. This method estimates copying volumes in the various sectors and size groups, based on the copying behaviour of individual employees.

Method

We asked people employed by companies to keep a log of their personal copying behaviour and the copying assignments they have given to others during a working week.

CAPI@HOME was chosen for carrying out the fieldwork, an access panel of our subsidiary NIPS, which consists of around 60.000 people who participate with investigations via a computer with a modem connection. The results of the investigation are based on 2.874 observations, divided across ten sectors and two size groups. The participants were sent five different forms to keep a log of their photocopying activities at work in the period from 13th to 17th May 2002. The respondents entered the results of the form onto the computer during the weekend following the working week and answered a number of additional questions on this subject.

In order to be able to draw conclusions based on the copying behaviour of individuals across the sector as a whole, two evaluations were carried out. First of all, those questioned within each sector were evaluated to such an extent that representation is achieved regarding educational levels and the number of hours people work during the week. Thereafter the sectors were evaluated, whereby the number of surveyed individuals per sector and per size group were evaluated according to the total number of employees in that sector and size group. Our copying behaviour estimates have been based on this information.

The copying volume in the week investigated

According to our estimate, 428 million photocopies were made during the week investigated. This number is divided across the sectors and size groups as follows:

- | | | | |
|---|----------|--------------------------------------|---------|
| • Other business services | 103 mil. | • Transport, storage & communication | 32 mil. |
| • Industry, production | 88 mil. | • Non-food retail trade | 31 mil. |
| • Wholesale, distributive trade | 63 mil. | • Catering | 19 mil. |
| • Building industry, building installations | 46 mil. | • Cars, repairs | 8 mil. |
| • Bank and insurance bodies | 32 mil. | • Food retail trade | 7 mil. |

The differences between the sectors investigated are quite considerable, but they are strongly related to the total size of the various different sectors. Most photocopies are made in the business services, following by the industry, wholesale, building and transport. The least amount is being copied in the food retail trade and the cars and repairs sector.

When we split the volume out into size groups, the picture looks as follows:

- 1-49 employees 227 million (an average of 86 per person per week)
- 50 and more employees 201 million (an average of 104 per person per week)

The average number of photocopies made per employee in a company increases as the number of people employed increases. This means more photocopies are made per person in larger companies compared to small companies. It appears that companies with 50 or more employees boast almost half (47%) of the total copying volume.

When we look at the volume of photocopying per company site, the differences, dependent on the size of the company, are even bigger. In company sites with 50 or more employees, the amount of photocopying being done is almost 40x as big as the copying done in companies with 1-49 employees. This is partly caused by the fact that large companies inevitably employ more people, but also more is being photocopied per person in bigger companies.

The copying volume subject to repro rights and not subject to repro rights

The volumes described above can be further described in accordance with the content of that copied. The following figure shows the shares of a number of categories in the total copying volume.

All Sectors (per week)					
Main categories	Mil.	%	Subject to repro rights	Mil.	%
Internal documents	251.8	58.8	Scientific	7.2	1.7
Official documents	33.2	7.8	Trade and practical journals	20.3	4.7
Brochures	17.3	4.0	Magazines - newsmagazines	2.8	0.7
(Strictly) private	42.7	10.0	General interest magazines	1.9	0.5
Other business	46.2	10.8	Educational books	3.2	0.7
Subject to repro rights	36.9	8.6	General books	1.5	0.4
TOTAL	428.1	100.0	TOTAL	36.9	8.6

	1 – 49 employees		50+ employees	
	Mil.	%	Mil.	%
Subject to repro rights	17.8	7.9	19.1	9.5
Not subject to repro rights	209.0	92.1	182.0	90.5

When all ten investigated sectors are combined, it appears that 91,4% of the photocopies made falls into the categories which are not subject to repro rights. The majority of this concerns internal documents. Official documents, (strictly) private documents and other business photocopies each have an approximately equal share in the volume which is not subject to repro rights, whilst the share of brochures, leaflets and such like is somewhat smaller. The largest part of the 8,6% (36,9 mil) photocopies which are subject to repro rights falls under the trade and practical information. Photocopies from other categories only have a small share in the volume subject to repro rights. There only appear to be small differences when looking at the size groups: the share subject to repro rights appears to be somewhat smaller at companies with 1-49 employees compared to companies with 50+ employees.

When we look at the copying volume subject to repro rights in its absolute sense, most of the photocopies subject to repro rights are made in the following sectors:

1. business services (12 mil. photocopies per week)
2. industry (6 mil)
3. building industry (4 mil)
4. bank and insurance bodies (4 mil)
5. wholesale (3 mil)

As is the case with the total photocopying volume, the volume subject to repro rights is obviously heavily dependent on the size of the various different sectors. When we look at the number of photocopies subject to repro rights *per employee*, this appears to be fairly consistent in the different sectors and is independent on the total number of photocopies per person. The direct result of this is that in sectors where the total photocopying volume is low, we find a higher percentage of volume subject to repro rights (for example the food retail trade). This also works the other way around, where in sectors with a higher copying volume, a relatively small percentage of volume is subject to repro rights (for example the industry). The bank and insurance bodies and other business services sectors form an exception to this rule, with high average numbers of photocopying subject to repro rights. We can explain this difference when we look at the

educational levels: in the two different sectors, the percentage of highly educated people is much higher and people with a higher level of education copy more per person.

An estimate of the annual volume

When we work on an estimate of the copying volume per year, based on our estimates in the week investigated, we arrive at an estimate of 19,7 billion photocopies. This comes down to 4,315 photocopies per employee per year in the sectors differentiated between in this investigation. The total number of annual photocopies subject to repro rights is estimated at 1,7 billion.