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Give The People What They Want, When They Want It, And They Won't Sit All The Time: Consumer Behavior in the Online Music Market

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Give The People What They Want, When They Want It, And They Won't Sit All The Time[1]

Consumer Behavior in the Online Music Market

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Honors Project
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1. Line from "Supergroovalisticprosifunkstication" by Parliament, purchased by Maxwell Mathews from the Amazon.com music store, December 2007

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Abstract

Since the introduction of the first peer-to-peer file sharing programs in the late twentieth century, sales of traditional music media have plummeted. Sales of CDs peaked in 2000 and have since returned to levels reached in the mid 1990s. The future of music marketing is certainly going to move toward complete online sales. However, online music sales will not increase unless more consumers who illegally download music or purchase CDs and other tangible music products move to online purchases. To determine how to draw more consumers to the online music market, this project attempted to gauge current music consumer behavior and their desires for online music. A survey was conducted on over 100 individuals and their music consumption habits. Our first hypothesis was that music consumers could be divided into three groups labeled for this project as traditionals, online-legals, and online-illegals. Our second hypothesis was that consumers would be more desirous of entering the online music market if they were offered a large array of products online. The results of this project indicate that most consumers do not fall neatly into any one of our hypothesized categories, and that lower prices, not value-added products or increased sound quality, is the factor that intrigued our subjects most. Most of our subjects belonged to a very specific segment of the music market that should be embracing legal online music, and their lack of enthusiasm about online music is surprising.

Introduction

The music industry is being turned upside down. The traditional model of controlling and distributing albums and singles to the public is no longer viable, as the Internet has allowed consumers to circumvent record companies in their search for music. Since 2000, when U.S. record sales peaked, the dollar value of CD sales has dropped over 44% ("2007 Year-End Shipment Statistics" 2008). Since the RIAA began measuring sales of legal online downloads in 2004, the total dollar value of downloaded albums has increased almost 834% ("2007 Year-End Shipment Statistics" 2008). At the same time, despite the promise of online music, sales from this new channel have not made up for the losses in CD sales, as the dollar value of CDs is still over 17 times that of online albums ("2007 Year-End Shipment Statistics" 2008). Certainly, new approaches to marketing music will be necessary in order to develop the online market.

Sales of Various Music Products, 1997-2007

	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006*	% CHANGE 2005-2006	2007	% CHANGE 2006-2007
CD (Units Shipped)	753.1	847.0	938.9	942.5	881.9	803.3	746.0	767.0	705.4	619.7	-12.1%	511.1	-17.5%
CD (Dollar Value)	9,915.1	11,416.0	12,816.3	13,214.5	12,909.4	12,044.1	11,232.9	11446.5	10,520.2	9,372.6	-10.9%	7,452.3	-20.5%
CD Single	66.7	56.0	55.9	34.2	17.3	4.5	8.3	3.1	2.8	1.7	-36.7%	2.6	51.5%
	272.7	213.2	222.4	142.7	79.4	19.6	36.0	14.982	10.9	7.7	-29.9%	12.2	59.0%
Download Single	-	-	-	-	-	-	-	139.4	366.9	586.4	59.8%	809.9	38.1%
	-	-	-	-	-	-	-	138.0	363.3	580.6	59.8%	801.8	38.1%
Download Album	-	-	-	-	-	-	-	4.6	13.6	27.6	103.3%	42.5	54.0%
	-	-	-	-	-	-	-	45.5	135.7	275.9	103.3%	424.9	54.0%
Mobile	-	-	-	-	-	-	-	-	170.0	315.0	85.3%	361.0	14.6%
	-	-	-	-	-	-	-	-	421.6	773.8	83.5%	878.9	13.6%
Subscription	-	-	-	-	-	-	-	-	1.3	1.7	34.9%	1.8	0.7%
	-	-	-	-	-	-	-	-	149.2	206.2	38.2%	200.9	-2.6%

("2007 Year-End Shipment Statistics" 2008)

The most popular culprit for the decline in music sales is illegal file-sharing. Though RIAA-initiated crackdowns in 2003 quickly and significantly reduced the number of files shared online, consumers have maintained a healthy level of file-sharing, using both on and offline mediums of transfer (Rainee, Madden, Hess, and Mudd 2004, pp. 1-3; Madden and Rainee 2005, pp. 1-2). A 2005 Pew study found that 48% downloaders who used both peer-to-peer and legal means to download music, also used less traceable means to trade music, including ripping from MP3 players, email trading, and file sites (Madden and Rainee 2005, pp. 1-2). These forms of

trade are unlikely to be curbed by legal action. Some major labels have begun to acknowledge that fierce crackdowns on peer-to-peer music trading are not the best approach to redirecting consumers to legal forms of online purchase and that some forms of free music can act as good promotion for the labels' products (Oberholzer and Strumpf 2005, pp. 2-3). In 2007, Warner Music Group sued the music site Imeem, only to drop the suit and use the site to stream Warner's music for free, making money through advertising revenues (Adegoke 2007; Caverly 2007). While these measures have promoted the exposure to and use of music, the losses from decreasing CD sales have made the development of the online music market even more imperative.

The question of how to grow the new online market was one of the driving forces behind this research. Obviously, this new market will evolve and develop into new and interesting realms. The major research question is why consumers have not fully embraced purchase of online music. In order to build up use of the online market, marketers have to do a number of things. First marketers must determine how to switch consumers who currently buy CDs or illegally download music to the legal online music market. If they cannot lead these consumers away from their current purchasing habits, they must try to drive consumers to incorporate legal online music into their musical diets. For those who do not switch to or incorporate online music purchases, marketers must discover whether it is inertia, lack of awareness or availability, high prices, or unattractive products that keep consumers away. Even though it is impossible that all consumers will ever fully embrace online music (sales of vinyl records, symbols of the pre-digital age, have seen a recent upsurge) discovering what consumers know and want can help marketers more fully meet the needs of consumers in the online market, and drive them to purchase more ("2007 Year-End Shipment Statistics" 2008). Another question this report's author (a self-described audiophile) was curious about was whether less obvious reasons for not

purchasing online music (for example low-quality sound) played a large role in consumer decision making.

Review of Literature

Much literature investigates the changing uses of music and new ways of pushing music in a post-CD economy. Research has proposed utilizing free peer-to-peer services in order to let consumers "sample" music and then buy it (Peitz and Waelbroeck 2006, pp. 909-910). The argument is that illegal downloading can be used as a marketing tool if consumers ultimately buy the products they are pirating. There is evidence this behavior exists, and music companies have used sampling to market music for years (Bhattacharjee, Gopal, Lertwachara, and Marsden 2006, pp.110). These studies have also shown that downloading activity can be used as an indicator of what consumers will buy in the legal music market (Bhattacharjee, Gopal, Lertwachara, and Marsden 2006, pp. 115). Other research has been devoted to understanding how legal fights in the online music market have shaped and will continue to shape the technologies that exist today (Tang 2005, p. 864). As important as such studies are for marketers and music sellers, no research available to the public truly examines what *consumers* want or what the future might hold for music consumption technology. The popular press continually speculates about "Music 2.0" and what the future of music has to offer, the transformation of the music consumption paradigm to a "customer-driven, bottom-up world" (Leonhard 2005). Some of the few indications of what consumers want from online music came in the form of reports by independent marketing research firms. A 2008 report by NPD Group indicated that the iTunes music store might not be the be-all-and-end-all of online music when it found that 90% of consumers who use Amazon.com's new MP3 download store had never used iTunes ("AmazonMP3 Music Download Store Offers New Hope for Digital Music Growth" 2008).

Project Objectives

Because little of what has been discussed in academic literature touches upon what consumers want from online music, this project was developed to gauge consumer desires. The researchers wanted to investigate what consumers want from online music in order to draw more consumers to this market. The researchers hypothesized that there were three types of music consumer, *traditionals* who purchase music in physical form, such as CDs or vinyl; *online-illegals* who acquire music from file sharing systems such as Limewire of BitTorrent; and *online-legals* who purchase music from online distributors such as iTunes or eMusic. The researchers wanted to discover if evidence for such divisions of consumer existed, and whether they wanted different things from their music. The hope was to determine what these consumers wanted from online music, and therefore how to switch them to or incorporate online music in their purchases. Additionally, a few questions were placed in the survey to understand more fully where consumers learn about and explore the music they acquire.

Methods

The research done for this project was performed using a short, 10-question survey (Appendix A). This survey was hosted on a URI web page on servers of the URI computer science department. Survey responses were saved to a small, secure PostgreSQL database on the URI Comptuer Science servers. This database was only accessible to the researchers through password access, protecting confidentiality. The survey was sent to respondents directly by the researchers, without use of third party survey development programs such as Zoomerang or SurveyMonkey. Respondents were solicited using the researcher's Facebook and MySpace accounts, as well as the researcher's personal email address book. The site hosting the survey

was closed at 119 responses received over a roughly 30-day period from early April 2008 to early May 2008.

Findings

The survey respondents were 45% male, 54.2% female. The median year of birth was 1986. 84% of our respondents were born between 1985 and 1990 indicating a very young pool of respondents.

The results of our survey did not reveal very strong evidence for the existence of our hypothesized categories of consumer, but seemed to indicate that most consumers fall into some combination of our categories.

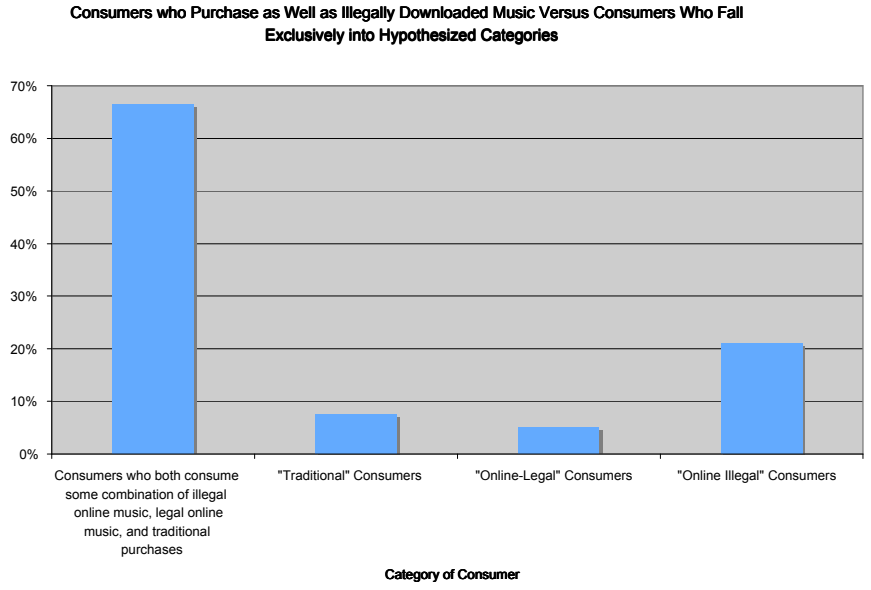

Figure 1

Most consumers indicated that lower priced downloads and a wider variety of music would entice them to purchase more music in the online marketplace. Value added products,

such as games, concert tickets, and ringtones did not seem to appeal to surveyed consumers, nor did better quality sound files.

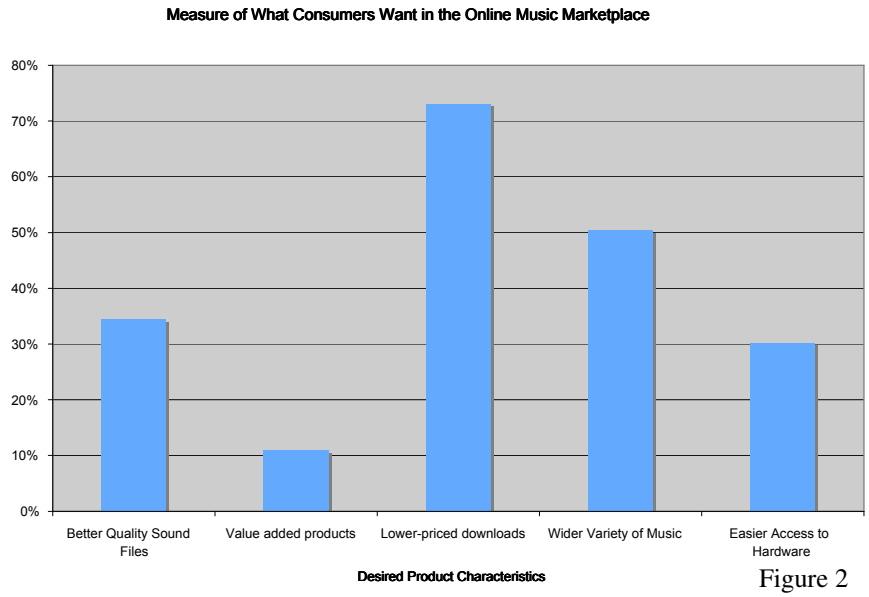

Figure 2

One interesting finding revealed that consumers in this study found out about music in very traditional ways, primarily through friends, family, and radio. 94% of respondents in this study found out about music in these ways, while 42% found out about music through some online means, either through blogs, forums, or social networking sites. 55% of consumers who found out about music through family, friends, or radio, found music without any use of blogs or social networking sites. 93% of those respondents used online means, whether legal or illegal, to consume music.

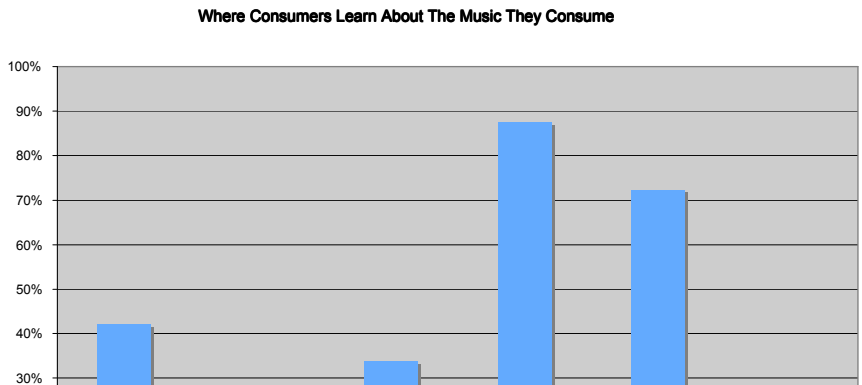

Figure 3

Analysis indicated that with our respondents who did not illegally download music, the threat of being caught was the least significant reason why they did not do it. The most significant reason found in this study was the threat of computer viruses.

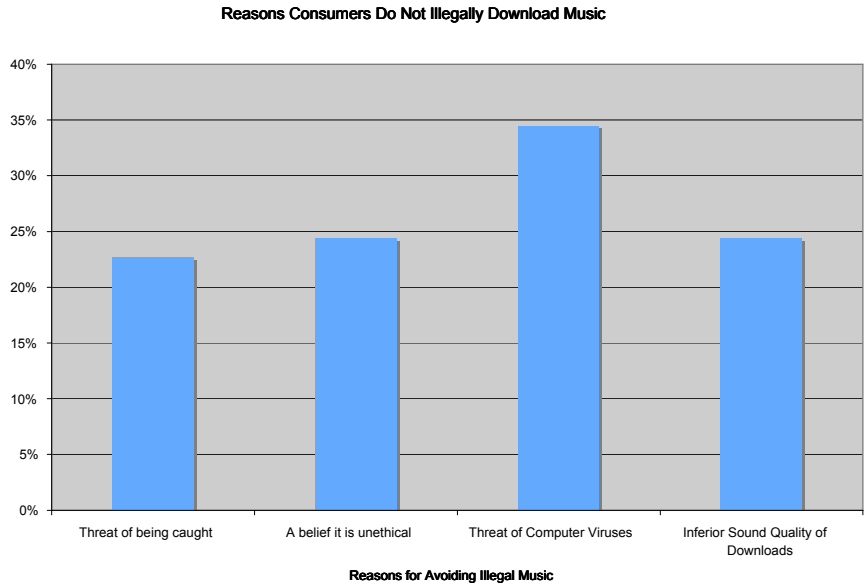

Figure 4

Due to the high percentage of consumers in this survey who downloaded music, we expected to find that consumers consumed music very frequently. This was not supported by our findings, which showed that consumers in our survey consumed music fairly infrequently.

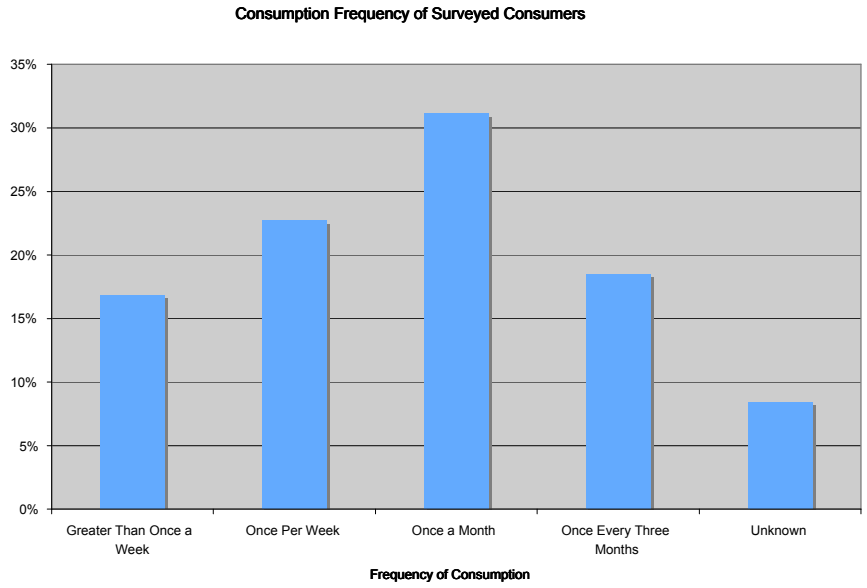

Figure 5

Conclusions

The most troublesome limitation of this research was the obvious survey bias derived from the limited pool of respondents. Because the respondents were culled from the researcher's cohort, the range of responses did not vary substantially from person to person. The majority of consumers polled during this project answered that they consumed some form of online music product, so it was difficult to differentiate over between large numbers of consumers. The lack of diversity forced this research to focus on the group as a whole as opposed to comparing and contrasting different consumer tastes.

Still, because users were allowed to select multiple options for many of the questions, the overlapping data revealed that consumers are not as cut and dried as we expected. This may reveal that in today's music market, consumers can define themselves by a limitless combination of goods, and there is probably no way to pull all consumers into the online music market (short

of annihilating record stores). The hope for marketers is to convince consumers to purchase more online music, and figure out ways to deliver products that can combine the physical experience of LPs and CDs (liner notes, tactility of the vinyl record) with the ease of peer-to-peer networks.

Respondents being drawn from the researcher's cohort, most respondents were college age, middle class, and tech-savvy consumers. Because most of these individuals were technologically aware, it is surprising to see so few respondents embracing legal online music. One possible reason is that current economic trends do not encourage luxury spending. Another is that this research did not accurately measure the changes in the bundle of music goods that consumers are purchasing. In other words, even though consumers indicated that they still buy CDs and illegally download, are they at least buying more online music than they were before? Another possibility is that this group of respondents may have more money than other groups and may be spending their money on more expensive forms of entertainment, such as DVDs and videogames, in lieu of music products. Future research should investigate whether alternative forms of entertainment are eating into music consumption, and whether music is becoming an inferior product.

Our findings on the places where consumers find out about new music was fairly consistent with recent findings on how consumers discover the music they buy. A Pew Internet & American Project report found that 56% of respondents used the Internet in product research, to find out about and connect to artists (Horrigan 2008, p. 2). Our research indicated that 40% of respondents used to Internet to explore new music, while 94% still relied on family, friends, or radio to find new music. More research is needed into exploring the value of face-to-face and traditional means of communication in the digital marketplace.

Some might criticize the method of this research (a survey) to be the incorrect approach to determining what consumers want. Researchers can discover what consumers want by looking

at what they buy, instead of asking what they would like to buy, critics claim. In today's rapidly changing marketplace, surveys become outdated because new products become available in the period it takes to analyze data. However, the focus of this research was to determine if there are products and services, currently unavailable, that might draw more consumers into the online marketplace. If a product that consumers want is not available to buy, market surveys will not indicate that consumers are purchasing the product. Therefore, by posing hypothetical products packaged with music (such as games, concert discounts, and ringtones), an understanding of what consumers want could be measured.

Further research should focus on how consumers learn about the music they buy, and how consumers think about music. Research should also continue to look at the use of viral communication and social networks in the development of online music markets. Research should try to identify opinion leaders in social networks whose tastes influence the consumption behavior of others. Less important to consumers than what they want, may be whether they want what opinion leaders have, and this sort of research may be more salient in developing the online music market, than measuring the tastes of all consumers.

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Appendix A

CONSUMER MUSIC SURVEY

1) Please Enter Your YEAR of Birth:

2) Please Select Your Gender:

3) HOW do you normally acquire your music? Please select all that apply

1. Buy CDs, LPs, and Cassettes in store
2. Buy CDs, LPs, online using sites such as Amazon.com
3. Online music stores such as iTunes or eMusic
4. Peer-to-peer downloading programs such as Limewire or Kazaa
5. Sharing of music between friends and family (e.g. CD burning, emailing music files)

4) If you do not use peer-to-peer downloading services, what prevents you from doing so?

1. A threat of being caught
2. A belief that it is unethical
3. A threat of computer viruses
4. Inferior sound quality of downloads

5) HOW OFTEN do you purchase or download music?

a) More than once a week
b) Once a week
c) Once a month
d) Once every three months
e) I don't know

6) HOW SOON after new music is released do you download or purchase it?

a) Less than one week
b) Less than one month
c) Less than one year
d) More than one year
e) I don't know

7) Please SELECT ALL of the ways you primarily learn about new music:

1. Printed or online music press (e.g. *Rolling Stone*, *Blender*, *Spin*)
2. Music blogs or forums
3. Social networking sites (e.g. Facebook, MySpace)
4. Friends or family
5. Radio
6. In store displays or other advertisements

8) Please SELECT ALL of the ways you primarily listen to music:

1. IPod or other music player with headphones
2. IPod or other music player with external speakers
3. On a computer with internal speakers
4. On a computer with external speakers
5. CD, record, or tape player
6. Radio (e.g. car, home, satellite)

9) HOW would you rate the sound quality of the music you listen to?

a) Excellent
b) Good
c) Fair
d) Poor

10) As a music consumer, what would entice you to purchase more online music?

1. Better sound quality of downloadable music files
2. Games, concert discounts, and ringtones only available to music downloaders
3. Lower prices for music downloads
4. A wider variety of music available for download
5. Easier access to music downloading hardware (e.g. iPods, computers)

11) How did you hear about this survey? Please select all that apply

1. Facebook
2. MySpace
3. Some other social networking site
4. A friend or family member

Appendix B – Informed Consent Document

CONSENT FORM FOR RESEARCH

file:///Users/dmathews/Desktop/musicdata/survey/index.html

Free Mahjong Game | CEFA - Clos...Association | Fast Compan... Executives | SSH Tunnel ...On MacOS X | Cash Prices ...r - WSJ.com | OTR.Network...o Network)

The University of Rhode Island
University of Rhode Island Honors Program
Roger Williams Complex, Butterfield Road, Kingston, RI 02881
Consumer Behavior in The Modern Music Market

CONSENT FORM FOR RESEARCH

You have been asked to take part in a research project described below. If you have more questions later, Maxwell Mathews, the person mainly responsible for this study, (401) 782-7645, will discuss them with you.

Description of the project:
You have been asked to take part in the study that examines consumer behavior in the market for music (mp3s, CDs).

What will be done:
During the course of this study, you will fill out a series of questions regarding your habits as a music consumer.

Risks or discomfort:
There is little risk of harm or discomfort that may occur as a result of participating in this study.

Benefits of this study:
Your participation in this study will help the researchers in charge of this study further understand consumer behavior in the music marketplace.

Confidentiality:
In no way will your answers to questions during this study be linked to you. No record of your identity will be linked to your responses in this study. This study does not ask of any personal information except age and gender. Your responses to this study will be completely confidential and stored in a database accessible only to the researcher and all information provided by you for this study will not be available to third parties.

Decision to quit at any time:
You may leave the study at any point by selecting the option to leave, and your responses will not be recorded.

Rights and Complaints:
If you are not satisfied with the way this study is performed, you may discuss your complaints with Maxwell Mathews at (401) 782-7645, anonymously, if you choose. In addition, you may contact the office of the Vice President for Research, 70 Lower College Road, Suite 2, University of Rhode Island, Kingston, Rhode Island, telephone: (401) 874-4328.

I WOULD LIKE TO PARTICIPATE IN THIS STUDY

I would NOT like to participate in this study

Appendix C – PHP Code For Controlling User Responses

```
<meta http-equiv="refresh" content="5; url=http://www.uri.edu">
<html>
	<head>
		<title>Thank You!</title>
	</head>
	<link rel="stylesheet" href="css/style.css" type="text/css"/>
	<body bgcolor="#F8F9B5">
	 <?php
		$databasename = "**********";
		$username = "*********";
		$pword = "**********";

		$db = pg_connect("dbname=$databasename user=$username password=$pword")
		or die("Couldn't Connect: $databsename" .pg_last_error($db));

		$yob=$_POST['yob'];
		$gen=$_POST['gen'];

		$q3a=$_POST['q3a'];
		$q3b=$_POST['q3b'];
		$q3c=$_POST['q3c'];
		$q3d=$_POST['q3d'];
		$q3e=$_POST['q3e'];

		$q4a=$_POST['q4a'];
		$q4b=$_POST['q4b'];
		$q4c=$_POST['q4c'];
		$q4d=$_POST['q4d'];
		$q4e=$_POST['q4e'];

		$q5=$_POST['q5'];

		$q6=$_POST['q6'];

		$q7a=$_POST['q7a'];
		$q7b=$_POST['q7b'];
		$q7c=$_POST['q7c'];
		$q7d=$_POST['q7d'];
		$q7e=$_POST['q7e'];
		$q7f=$_POST['q7f'];

		$q8a=$_POST['q8a'];
		$q8b=$_POST['q8b'];
		$q8c=$_POST['q8c'];
		$q8d=$_POST['q8d'];
		$q8e=$_POST['q8e'];
		$q8f=$_POST['q8f'];

		$q9=$_POST['q9'];

		$q10a=$_POST['q10a'];
		$q10b=$_POST['q10b'];
		$q10c=$_POST['q10c'];
		$q10d=$_POST['q10d'];
```

```
        $q10e=$_POST['q10e'];

        $q11a=$_POST['q11a'];
        $q11b=$_POST['q11b'];
        $q11c=$_POST['q11c'];
        $q11d=$_POST['q11d'];

        $uid_q = "SELECT MAX(uid) FROM user_table";
        $uid_result=pg_query($db, $uid_q) or die("error");
        $my_row = pg_fetch_row($uid_result, 0, PGSQL_ASSOC);
        $new_uid = $my_row["max"]+1;

//      echo "$yob<br>";
//      echo "$gen<br>";

        $add_user_q = "INSERT INTO user_table VALUES ('$new_uid', '$yob', '$gen')";
        $add_user_result = pg_query($db, $add_user_q) or die("error");

        if (!($q3a)) $q3a=0;
//      echo "$q3a<br>";
        if (!($q3b)) $q3b=0;
//      echo "$q3b<br>";
        if (!($q3c)) $q3c=0;
//      echo "$q3c<br>";
        if (!($q3d)) $q3d=0;
//      echo "$q3d<br>";
        if (!($q3e)) $q3e=0;
//      echo "$q3e<br>";

        $q3_q = "INSERT INTO q_03 VALUES ('$new_uid', '$q3a', '$q3b', '$q3c', '$q3d', '$q3e')";
        $q3_result = pg_query($db, $q3_q) or die("error");

        if (!($q4a)) $q4a=0;
//      echo "$q4a<br>";
        if (!($q4b)) $q4b=0;
//      echo "$q4b<br>";
        if (!($q4c)) $q4c=0;
//      echo "$q4c<br>";
        if (!($q4d)) $q4d=0;
//      echo "$q4d<br>";

        $q4_q = "INSERT INTO q_04 VALUES ('$new_uid', '$q4a', '$q4b', '$q4c', '$q4d')";
        $q4_result = pg_query($db, $q4_q) or die("error");

//      echo "$q5<br>";

        $q5_q = "INSERT INTO q_05 VALUES ('$new_uid', '$q5')";
        $q5_result = pg_query($db, $q5_q) or die("error");

//      echo "$q6<br>";

        $q6_q = "INSERT INTO q_06 VALUES ('$new_uid', '$q6')";
        $q6_result = pg_query($db, $q6_q) or die("error");

        if (!($q7a)) $q7a=0;
//      echo "$q7a<br>";
        if (!($q7b)) $q7b=0;
//      echo "$q7b<br>";
        if (!($q7c)) $q7c=0;
//      echo "$q7c<br>";
        if (!($q7d)) $q7d=0;
//      echo "$q7d<br>";
```

```
            if (!($q7e)) $q7e=0;
//          echo "$q7e<br>";
            if (!($q7f)) $q7f=0;
//          echo "$q7f<br>";

            $q7_q = "INSERT INTO q_07 VALUES ('$new_uid', '$q7a', '$q7b', '$q7c', '$q7d', '$q7e', '$q7f')";
            $q7_result = pg_query($db, $q7_q) or die("error");

            if (!($q8a)) $q8a=0;
//          echo "$q8a<br>";
            if (!($q8b)) $q8b=0;
//          echo "$q8b<br>";
            if (!($q8c)) $q8c=0;
//          echo "$q8c<br>";
            if (!($q8d)) $q8d=0;
//          echo "$q8d<br>";
            if (!($q8e)) $q8e=0;
//          echo "$q8e<br>";
            if (!($q8f)) $q8f=0;
//          echo "$q8f<br>";

            $q8_q = "INSERT INTO q_08 VALUES ('$new_uid', '$q8a', '$q8b', '$q8c', '$q8d', '$q8e', '$q8f')";
            $q8_result = pg_query($db, $q8_q) or die("error");

//          echo "$q9<br>";

            $q9_q = "INSERT INTO q_09 VALUES ('$new_uid', '$q9')";
            $q9_result = pg_query($db, $q9_q) or die("error");

            if (!($q10a)) $q10a=0;
//          echo "$q10a<br>";
            if (!($q10b)) $q10b=0;
//          echo "$q10b<br>";
            if (!($q10c)) $q10c=0;
//          echo "$q10c<br>";
            if (!($q10d)) $q10d=0;
//          echo "$q10d<br>";
            if (!($q10e)) $q10e=0;
//          echo "$q10e<br>";

            $q10_q = "INSERT INTO q_10 VALUES ('$new_uid', '$q10a', '$q10b', '$q10c', '$q10d', '$q10e')";
            $q10_result = pg_query($db, $q10_q) or die("error");

            if (!($q11a)) $q11a=0;
//          echo "$q11a<br>";
            if (!($q11b)) $q11b=0;
//          echo "$q11b<br>";
            if (!($q11c)) $q11c=0;
//          echo "$q11c<br>";
            if (!($q11d)) $q11d=0;
//          echo "$q11d<br>";

            $q11_q = "INSERT INTO q_11 VALUES ('$new_uid', '$q11a', '$q11b', '$q11c', '$q11d')";
            $q11_result = pg_query($db, $q11_q) or die("error");

//          echo "$new_uid";

        ?>
        <style1>
            <br>
            <div id="container">
            <br>
```

```
            <style1>
            <div id="text">
            <center>
            Thank you for your time! Your responses have been recorded. This page will be redirected<br>
            to the University of Rhode Island Website in 5 seconds.
            </center>
            </style1>
        </body>
</html>
```