Tangibility and Immateriality:
Understanding Consumers’ Changing Sense of Touch in the Music Industry

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Chapter I

Introduction

Apple introduced the iTunes digital music service in 2003. It came after almost a decade of the music industry struggling to advance with the growing Internet phenomenon, including a public relations disaster as the industry sued consumers who were illegally downloading catalogues of music for free. With the iTunes Store, Apple brought legal downloading to the Internet and showed record labels how to embrace the evolving digital world. After Apple initially cornered the market, other legal downloading services surfaced, including online radio service Rhapsody, Amazon’s music store, and a reinvented, legalized version of Napster, the service that originally fueled illegal downloading.

However, the Internet did not stop evolving, and this has forced the music industry to continue adapting. Users are now shifting from records and CDs to streaming services, including Spotify and iTunes Radio, that do not require them to have any ownership of the music they are listening to. The goal of this research is to understand if there is a lost sense of physical ownership and if that loss is changing the experience of listening and owning music for fans. Understanding if users have left their CDs and records for digital music services has applicability beyond the music industry, although it may finally encourage that industry to anticipate change instead of failing to keep up with innovation.

This research has implications beyond the music industry. With music being stored in a “cloud” and held by companies around the world, what else will consumers lose a sense of touch for? Industries as different as the newspaper industry and the film industry will likely see ramifications from the changing consumer interactivity patterns and their desires for convenience in their entertainment.
Chapter II

Literature Review

History and Development of Recorded Music

The music industry has existed in some form for almost one century (Sen, 2010). Recorded music has existed in a way familiar to current audiences since the introduction of the LP, or long-play format, in 1948 (Krasilovsky & Shemel, 2007). In the course of over 70 years, new technologies have constantly been introduced to improve sound quality, hardware portability, and the overall listening experience. For example, from its earliest introduction, Apple’s iTunes store has been viewed as a major indicator for the music industry as it paved a path to digitalization and innovation through technology (Bhattacharjee, Gopal & Sanders, 2003). The industry has “adapted to many technological advances in sound technologies,” which have improved upon areas including sound quality and music storage ability (Sen, 2010). Music listeners in the twenty-first century care about the quality of sound just as much as they care about the overall aesthetic look of the hardware or interface they are using (Guberman, 2011). All of these changes mean that the listening experience has grown and shifted significantly since the LP was first introduced.

While the LP was the initial playback format, the cassette and similar cartridges became the standard in the 1960s, with stereo sound becoming the expectation for recordings from listeners. The cassette allowed more manufacturers to join the recorded music business, which encouraged the industry overall to grow, both in production capacity and in the number of artists supported by a given label (Krasilovsky & Shemel, 2007). Krasilovsky and Shemel (2007) cite the cassette as the dominant format by 1983, with increased use encouraged by the Walkman player.
Sony introduced the Walkman portable player in the 1980s, as the company was seeking to “change the dynamics of the portable music player user base” (Guberman, 2011). Before the Walkman arrived with the guaranteed ability to give listeners a private and portable experience, the typical transportable device was a stereo system that blared music at top volume through large speakers. Sony brought the listening experience to one listener, without others experiencing the music (Guberman, 2011). However, the cassette’s lifetime as the dominant format would be short-lived, due to the introduction of the compact disc.

The compact disc was introduced in the early 1980s and first marketed to consumers in 1982 (Sandulli, 2007). The compact disc was significant for a number of reasons. It signified not only a change from the cassettes and LPs of the previous years, but it also showed a major advance in computer technology influencing the recording industry (Sandulli, 2007). “For the first time, sound waves were translated into binary language transforming music into digital content” (Sandulli, 2007). The compact disc introduced the beginning of digitalization for the music industry (Guberman, 2011). As Sandulli (2007) writes, digitalization was not immediately perfect in the early 1980s. It took until the mid-1990s for music to be found on computers, and the songs ripped from compact discs took up a lot of space on computer hard drives at that point in time (Sandulli, 2007). The compact disc experienced some of its highest sales in the 1990s, only to see a significant drop with the arrival of the 2000s and a greater push by consumers to go online (Krasilovsky & Shemel, 2007).

The compact disc experienced updates to its form while record labels failed to adjust to the growing digital format that was becoming popular on personal computers. Many of the physical changes were the results of significant declines in sales. Compact disc sales dropped from 77.8 million in 2000 to 44.1 million in 2004 (Sandulli, 2007). A key strategy for record
labels through the early 2000s was to maintain physical attributes of the album that would entice listeners to own the CD and not digitally download (Krasilovsky & Shemel, 2007). The DualDisc format was introduced in 2005 to lure buyers to continue purchasing a physical product. The DualDisc was a compact disc on one side and a DVD on the other, and the format typically featured special video features on the DVD side that could not be found anywhere else (Krasilovsky & Shemel, 2007). Record labels hoped that the new format, licensed through the Recording Industry Association of America, would encourage physical sales. Artists including Bruce Springsteen and Jennifer Lopez were among the first artists to issue releases on DualDisc, which ultimately failed to produce increases in sales that labels wanted and expected (Krasilovsky & Shemel, 2007). Specialized artwork and packaging were also offered for some albums, which failed to produce significant sales for the compact disc as well.

From the 1940s through the early 2000s, the music industry traditionally had three components. Those were music and song creation; music marketing; and music distribution (Sen, 2010). Those facets have changed, though, as time has passed and technologies evolved. Recorded music has come to the present by jumping to the Internet, and the transition has been aided by what Sen (2010) calls the “merger of audio and computing technologies.” One of the most significant examples of this comes from the introduction of the iPod, a digital music player designed to play MP3s from Apple’s iTunes store. The iPod is one example of technology adaptation; it is essentially “a computer with a hard drive, a display, and a battery” (Krasilovsky & Shemel, 2007). It is also an example of how computing has changed the music industry, especially the listening experience. “Computers are at the heart of the digital recording process; they are necessary for playing CDs and for disassembling and reassembling the sequence of numbers that makes up a digital recording” (Krasilovsky & Shemel, 2007). No arguments for
digital music could exist without computers and the integration of computers into the industry in the first place (Krasilovsky & Shemel, 2007).

Computers, the Internet and Recorded Music

The Internet existed as early as cassette tapes, with its initial beginnings in the 1960s (Turner, 2003). However, it became a common feature in many households in the early 1990s, with continued growth occurring into the mid-1990s. It was the MP3 file format, which was introduced by German technology firm Fraunhofer Gessellfshaft, that gave music a place on the Internet (Sandulli, 2007). Aided by the growth and expansion of broadband networks, the German firm gave the world the Motion Picture Experts Group Layer 3, or MP3, file format. The purpose of the file format was to compress music into a manageable file for computers and other digital technologies (Sandulli, 2007). Despite this major breakthrough, which made music into a truly digital format for the first time, none of the four major music labels at the time responded to the MP3. None of them “decided to start distributing MP3 music through the Internet on a large scale” (Sandulli, 2007). Instead, it was consumers who saw the changes coming and who took advantage of the MP3 format.

Winamp, a prototype digital music player introduced in 1997, encouraged the growth of the MP3 format while also being “one of the most frequently downloaded computer programs before Napster had even appeared” (Guberman, 2011). Perhaps the most important contribution Winamp made to the music industry, beyond the accelerated growth of the MP3 file type itself, was the fact that it gave users the ability to build playlists for the first time within the service’s operating system. “The system improved on previous methods of creating personal compilations, such as the mix-tape, because playlists had no time constrictions and could be changed instantly, saved forever, or easily deleted” (Guberman, 2011). Playlists became a major incentive in digital
music services, started by Winamp. Consumers were able to put the songs they wanted in any order they wanted, developing a stronger personalized experience that began with the introduction of the Walkman over a decade before. A highly personalized listening experience would only continue to grow in importance in the music industry in coming years (Rossman, 2012).

Winamp was a legal service, but it was a prototype. Programmers soon figured out ways to share music online for free, and this file sharing was the first step leading to legal, structured music services online. File sharing was “pioneered by Napster” and “dominated” by Australian-based Kazaa (Peitz & Waelbroeck, 2006). Following the introduction of the MP3 format, consumers were left to develop the services that specialized in distribution of the MP3. This was a result of the major record companies not embracing the new technology (Sandulli, 2007). Consumers were the ones who, often in their college dorm rooms, wrote the software that allowed for peer-to-peer (P2P) sharing. They not only created the software but spread it around the fledgling Internet, encouraging others to use the software to get the music they wanted in a format that they could use (Sandulli, 2007). Research conducted by Sandulli (2007) shows that “the result of the technological change produced by the new compression and distribution technologies was that in December 2005, almost 10 millions of users downloaded digital music from P2P networks.” Consumers knew what they wanted, knew how to get it, and knew that the music industry was not giving them the resources to do it legally.

Krasilovsky and Shemel (2007) outlined some of the ways the music industry was affected by the explosion of peer-to-peer file sharing. The three main ways were by bootlegging, piracy, and counterfeiting, which they clearly defined in their research. “Bootlegging is the unauthorized recording of a live or broadcast performance. Piracy is the unauthorized
duplication of the actual sound recording. *Counterfeiting* is the duplication of the packaging, artwork, and label as well as the sound recording” (Krasilovsky & Shemel, 2007). All of these methods were used on digital services including Napster and Gnutella as users became comfortable with and willing to use these file-sharing services.

File sharing was a shock to an unprepared music industry. For years, the industry had worked under the assumption that music-buying consumers would continue to be music-buying consumers. The music industry relied on the idea that consumers would pay for music. Research by both Pietz and Waelbrock (2006) and Kwong and Park (2008) showed that file sharing changed this mindset on the consumer end. “The intention for people to use file-swapping, even though they risk breaking the law, is that the songs are free” (Kwong & Park, 2008). Consumers were able to get past the idea of doing an illegal act in order to get music they wanted in a format that was convenient for them. As early as the year 2000, 14 percent of Internet users had downloaded music for free. Nearly 15 years ago, consumers were indicating that they wanted music online, where they were frequently beginning to get other information and forms of entertainment (Bhattacharjee, Gopal & Sanders, 2003).

Steps were taken to halt file sharing as technology advanced in the early 2000s. This includes the Recording Industry Association of America (RIAA) suing consumers who were pegged as file sharers and efforts by the RIAA to shut down sites that post albums for free download. When it comes to new technology, the music industry has taken steps so that consumers “cannot redistribute what they have downloaded without the consent of the providers” (Kwong & Park, 2008). Legal digital music services have been created so that consumers can pay a flat fee for unlimited access to a library of songs, in the case of Rhapsody, or consumers can pay per song or album, as in the case of iTunes (Sandulli, 2007).
While the iTunes store is seen as the significant hallmark of the transformation to digital, online radio has also played a major part in shifting consumers to the online world (Rossman, 2012). There was a major push early on for terrestrial radio users to shift to Internet-based radio, especially with hardware available that would put these services in the car (Lin, 2009). “Online radio services enable Internet users to receive audio programs originated from terrestrial radio stations and Internet-exclusive audio program providers around the clock from anywhere in the world” (Lin, 2009). According to research by Lin in 2009, the merged Sirius XM radio group had 19 million paying subscribers for its online services, including in-vehicle subscriptions. However, other services, like Pandora Internet radio, were offering free streams of online radio stations to users (Pack, 2008). Where Sirius XM relies on paid subscriptions, advertising supports Pandora’s radio service. One of the major appeals of Pandora is that users do not have to download any additional software or purchase hardware to have the service work. All users need is the ability to browse the web (Pack, 2008). Depending on the user, Sirius XM and Pandora are both viable options for legal online music listening, and both services offer nearly unlimited options in what consumers can listen to.

Even newer services allow consumers to access unlimited music from a cloud computer, without ever having to actually own the music they are listening to (Greenwood, 2010). Following the introduction of the iTunes Store in 2003, other stores cropped up, including Amazon’s MP3 store. Both Amazon and iTunes now offer cloud-computing storage options for music files. In the United States in December 2005, there were 1.4 million subscribers to standard legal music services that allowed consumers to store the files on their own computers (Sandulli, 2007). “Digital technology sharply reduced those costs related to the reproduction and distribution of music on digital format” (Sandulli, 2007). The digital format also encouraged
further mobile growth, as cell phones have integrated music players as well as the ability to access the Internet, including streaming capabilities. In 2010, there were over five billion cell phone subscriptions globally (Doi, Mason & Wiercinski, 2011). In just one year, from 2009 to 2010, cell phone Internet use increased from 25 to 38 percent of the cell phone-using population (Doi, Mason & Wiercinski, 2011). A cell phone can now function as a part of a computing cloud, meaning that music listeners only need to have a cell phone to listen to any song or album that he or she wants. This also encourages mobility and the most personal listening experience possible, as cell phones have all of the capabilities of a computer and fit in one’s hand.

While the costs were significantly decreased by the digital advent, some believed that the sound quality was also decreased and might be a factor in a purchase decision. While MP3 compression quality is not perfect, Sandulli (2007) points out that the human ear cannot actually perceive most of the major differences in quality. A lack in MP3 quality could lead consumers to remain attached to physical formats with better reproduction attributes. Bhattacharjee, Gopal, and Sanders (2003) showed in their study that the quality of a song that had been compressed was not likely to affect most listeners. “The perceived quality of compressed audio did not seem to play any significant role” in deterring respondents from consuming digital downloads (Bhattacharjee, Gopal & Sanders, 2003). Ultimately, consumers have options for purchasing and streaming through more services than they ever have before (Walmsley, 2009).

Consumers’ options will only continue to grow with the advancements of cloud computing, which is the technology that supports most of the current streaming services, as previously mentioned. According to research conducted by Forrester Research in 2013, at least 77 percent of United States online adults were using at least one cloud-computing platform (Gillett, 2014). Additionally, reports by comScore from 2014 also show the growth of cloud-
based platforms growing considerably from 2011 through 2014. Spotify, the digital streaming
service already discussed, saw an increase in users from 1.1 million in July 2011 to 14.1 million
in February 2014 (Gillett, 2014). Spotify is not alone in its growth, both in significant increases
and in speed. Pandora, the Internet radio company also already mentioned, surpassed 250 million
users in February 2014 (Solsman, 2014). In the last year alone, Pandora saw an increase of 50
million users. While the company’s start was slow, it is now averaging 50 million new users each
year and is on pace to keep those numbers alive (Solsman, 2014). Consumer adoption of cloud
services for many aspects of their lives are continuing to grow, and the adoption has exceeded
expectations for how rapidly it is occurring and how much consumers are using (Maisto, 2012).
Consumers are becoming comfortable with storing information on a server that is not attached to
the hardware they own; they are further becoming used to being able to access their information
and their documents from any computer anywhere in the world (Gillett, 2014). Cloud computing,
then, will continue to influence how consumers access and save their music files, especially with
services like Spotify and Pandora showing steady growth each year.

Molteni and Ordanini (2003) write that the music industry is one industry that is
obviously influenced by growing technological changes. Part of this comes from the visibility of
changes in channels including production, distribution, and consumption, all of which have
changed with the influence of the Internet (Molteni & Ordanini, 2003). One of the best examples
of technological change influencing the music industry is the introduction of the streaming
service Spotify. Spotify was first introduced in a handful of European countries in 2006 and is
now available in Europe and the United States (Greenwood, 2010). The premise behind Spotify
is to offer legal streams of millions of songs, supported by advertising revenue for listeners who
do not want to pay and premium subscriptions for those who are willing, with support from all of
the major record labels as well as many independent labels (Rossman, 2012). The streaming service takes advantage of cloud computing and puts this new technology in “the hands of the consumers,” who may be more likely to adopt cloud computing in other areas if they are willing to put their music files in a cloud (Greenwood, 2010). Using music to become familiar with cloud computing could encourage users to become more comfortable with the technology overall. If the Internet is influencing the music industry as indicated by Molteni and Ordanini (2003), streaming services like Spotify show how this change is being put into action. Of course, the introduction of a legal service like Spotify that offers unlimited music for free is also another step taken by the industry to stop illegal file sharing. File sharing remains a problem, though it has been slowed in the last ten years and shows no signs of growth (Rossman, 2012). Digitalization advances in every area, and while Napster and Kazaa are gone, other websites have taken their place. Most notable is the Pirate Bay, a Swedish torrent website that makes downloads available for free without storing them on its own servers (Walmsley, 2009). Yet for the first time, the music industry is making real efforts to keep up with piracy advocates and offering services that can legitimately compete in a way that is desirable to consumers. While the music industry has a legacy of lagging behind, introducing Spotify and similar services with the support of record labels seems to indicate a move on the part of the industry to actually innovate (Greenwood, 2010). Having the record labels on the brink of technology helps to encourage music consumers to adapt to new technology that they are already interested in. If consumers have access to every song and artist that they could possibly want, this could help them align themselves with a legal service.

Sen (2010) also cites artists like Beck as further influencing the changing music industry online, especially as Beck was not afraid to innovate and risk his own art in the process of
innovating. Artists are aware of the changes occurring and the need to grow, and in many cases artists adapted to the Internet before their labels ever could. As early as 2004, Beck’s Guero was leaked online, which was followed by a full version released on compact disc in 2005. However, the online version spawned remixes and mash-ups, leading to a “reshaping of the album format” (Sen, 2010). This example also shows how fans are becoming a major component in the changing online world within the music industry. As Sen (2010) says, the fact that remixes and mash-ups exists shows that fans can now dictate how their version of an album is; they can create their own idealized version of an album by engaging with a digitalized product. Artists can use this to develop fan bases beyond what a label can offer, and consumers are able to have a more personalized interaction and experience with a given artist.

**Consumers and Digitalization**

Many digital music services experience minimal lag time in being adopted by consumers. Legal streaming services are becoming the norm for listeners looking to hear music for free (Kwong & Park, 2008). These services are allowing users to not only find more new music than they have in the past, but they are also encouraging fans to connect with each other in ways they never have before. “With a huge push from digital technology, music is zipping around the world at the speed of light” and connecting fans with musicians and new cultures (Sen, 2010). Additionally, digitalization is allowing consumers to participate with their music more than ever, as seen in the consumer’s ability to create mash-ups and remixes. Sen (2010) writes that the music industry is at its most democratic, especially concerning areas like production and distribution. Consumers are not bound to buy a compact disc to hear one song; instead, consumers can not only choose which songs they want to hear, but where they want to hear them, whether that is online through a streaming service or in their own digital music libraries.
(Doi, Mason & Wiercinski, 2011). Sen (2010) explains it in this way: “The recorded album as we know is going out of style,” and consumers know it.

Molteni and Ordanini (2003) write that it is essential to understand why the consumer “takes an active part in the consumption process,” especially because the findings are going to be applicable beyond the music industry as a result of extensive digitalization. They point out that not only is music available online for downloading, but so are other media, including books and movies (Molteni & Ordanini, 2003). Sandulli (2007) supports the idea of understanding digitally savvy consumers, stating that an understanding of their digital preferences would shed light on declining sales within facets of the recording industry. He emphasizes understanding illegal and legal downloads and how these influence the shift to digital (Sandulli, 2007). When it comes to understanding why consumers are making a move to digital services within the music industry, Molteni and Ordanini (2003) cite the “enlarging opportunities for consumption” that are encouraged by digital services. With no physical ownership, consumers have an almost unlimited library of artists, songs, or albums to choose from (Molteni & Ordanini, 2003).

By 2004, Apple’s iTunes music store had sold over 150 million songs in ten months, and the service was averaging at least four million song sales a week (Kwong & Park, 2008). The ongoing challenge that digital music services face is that legal services compete not only with each other, they also compete with illegal alternatives that are also free (Kwong & Park, 2008). Not only does a streaming service like Spotify compete with Pandora’s online radio service or Sirius XM’s Internet radio, but they all compete with the likes of torrent websites, especially the Pirate Bay. Users have the ability to download, in bulk, songs and albums they want at no cost and that they can later put on their iPod or MP3 player, which is an option not readily, freely available through a service like Spotify (Walmsley, 2009).
Consumers adopt new technology.

Another component of consumers and digitalization in the music industry is how quickly consumers adapt to new technology. The adopter S curve is important in understanding how consumers adapt to changes in technology and how readily they will use new that new technology. “In the beginning, when familiarity is confined to a few, acceptance spreads slowly to a wider population” (Bejan & Lorente, 2012). This is because only a small group of individuals will use the newest products when they are first unveiled; it takes a few to test a new product or service before others will. As innovation spreads, more consumers will adopt it, and this is called the diffusion of innovation (Rogers, 2007). Some consumers will resist change, and some of consumers will avoid using a new product that differs from the norm. However, Rogers (2007) defines innovation as “an idea, practice, or object perceived as new by an individual or other unit of adoption.” Adopters see something is new and, at some point along the S curve, will use the new technology. The S curve is a function of time, as it is low immediately due to only a few adopters and then increases when a larger population embraces a new technology (Bejan & Lorente, 2012). The S curve is one way to explain why some consumers still listen to CDs or prefer to use vinyl records. They may be late adopters of digital technology, and they may be resistant to the change that the new digital music services offer. Some consumers are comfortable with CDs, and they do not want to change away from them.

Molteni and Ordanini (2003) divide consumers into groups based on what they call social and cultural values; their divisions look at how readily someone will adopt a new technology or adapt to new technology using a scale similar to that of the standard S curve. Molteni and Ordanini (2003) specifically used music consumers to develop this particular scale. Their three groups are enthusiastic anticipators; laggard adopters; and skeptics (Molteni & Ordanini, 2003).
The example offered is that of music downloaders compared to vinyl consumers; one is seen as an enthusiastic adopter of new music technology, while the other is considered a skeptic of that same technology (Molteni & Ordanini, 2003). Molteni and Ordanini’s research supports later research by Chen, Shang, and Lin (2008), which illustrates consumers as value-maximizers who will pay for music if it is of the right value to them. In this case, an enthusiastic anticipator is more likely to purchase a subscription to a new music service based on the value it offers them as someone who is going to engage with new technology, whereas a skeptic will likely not pay for that same service and may not even be willing to download music at all.

This is an idea supported by the research Sandulli (2007) conducted. Those users in Sandulli’s (2007) study who identified as low CD users were mostly influenced by the price of an album. Again, these low CD users are “value maximers,” as identified by Chen, Shang, and Lin (2003), who do not want to pay the price for a full physical album because it does not give them the ultimate pay off they are looking for. The research here indicated that a willingness to pay is a major factor for digital users, especially those who are peer-to-peer users (a primary group in this particular research study) (Sandulli, 2007). Respondents who were willing to buy CDs tended to also be willing to pay for digital downloads. Those willing to buy CDs and pay for digital downloads are likely to share similar characteristics as or even be considered an enthusiastic anticipator. Further research showed how legal digital services were outperforming illegal services as well. Numbers in 2006, released by the Recording Industry Association of America, showed that digital music sales were up 77 percent over a yearlong period, while illegal file sharing showed no significant increases over the same time period (Kralislovsky & Shemel, 2007).
Earlier research conducted by Kinnear and Terrel (2001), before the introduction of
streaming services, also supported the idea of MP3s supporting later compact disc purchases. At
the time of the research, Kinnear and Terrel (2001) reported that 52.7 percent of those who
identified themselves as MP3 downloaders said that their downloading activities had no
influence on how many compact discs they purchased. These consumers still bought CDs while
also downloading music. Of the respondents in this particular survey, seven percent said that
they had bought more compact discs as a result of being able to download MP3s (Kinnear &
Terrel, 2001). This idea supports the research Sandulli (2007) conducted, which is that price is a
strong factor for those who are going to legally download music. A willingness to pay for music
may transcend physical and digital boundaries.

**Perceived service quality.**

A major factor in how consumers appreciate a product is called perceived service quality,
according to research done by Kwong and Park (2008) Essentially, perceived service quality
deals with consumer expectations and the resulting feelings consumers have. “Service quality is
founded on a comparison between what the customer feels should be offered and what is
provided” (Kwong & Park, 2008). Spreng and Mackoy (1997) first harmonized perceived
service quality with actual customer satisfaction. Research showed that “expectations have a
significant effect on perceptions of performance” (Spreng & Mackoy, 1997). Previously,
consumer satisfaction studies and perceived service quality studies were not put together, with
perceived service quality understood as an ideal and not as an influencer of actual satisfaction
(Spreng & Mackoy, 1997). The most important takeaway from the initial research by Spreng and
Mackoy (1997) is that while the two are not the same, perceived service quality does influence
satisfaction for consumers. Malik (2012) updated this research by showing a strong, growing
correlation between perceived service quality and actual consumer satisfaction, with both being influenced by perceived value for the service. Perceived service quality is measured by “assessing customers’ expectations and perceptions of performance level for a range of service attributes” (Kwong & Park, 2008).

Swaid and Wigand (2012) conducted research on consumers’ perceived service quality in online interactions, which influences how consumers interact with digital music services and their perceptions of those services. Focusing on shopping online compared to in-store, Swaid and Wigand (2012) discovered that a positive online experience and increased perceived service quality led to a stronger sense of loyalty for consumers for a given service or brand. The research also indicated that responsiveness to consumer needs, like the balance of online shopping with the ability to pick up orders in a physical store in the study, increased perceived service quality (Swaid & Wigand, 2012). Malik (2012) further shows that an increase in value for a service can improve perceived service quality. His research shows that a price increase in a service leads consumers to believe the service is more valuable, and this leads to a higher expectation of the quality. The payoff was often greater consumer satisfaction overall (Malik, 2012). Should the online shopper in Swaid and Wigand’s (2012) research have both flexibility and the increased sense of value overall that Malik (2012) proposes, the shopper should be satisfied with the entire service experience. The idea that perceived service quality and consumer satisfaction are tied together can influence the music industry. If a music consumer believes that music has a set value or is at least more valuable than another good, the reward for using a digital music service that has full online functionality may be greater for him or her than if the consumer does not place value on music as a good or service. Increasing the value of music, specifically of a digital file, could change consumer perceptions and increase usage of digital services.
Perceived service quality has already been applied in the music industry, specifically in the digital music space as services have become more prominent. The 2008 study conducted by Kwong and Park indicated that “a well-designed interface will provide motivations for a user to revisit a given service.” Kwong and Park wanted to understand what it would take to get consumers to revisit a digital service like iTunes or Spotify, and they focused on the attributes that consumers interact with most directly: the interface itself, and the given abilities of that interface. Their research showed that a good design encouraged more use of a given service (Kwong & Park, 2008). This research is supported by Swaid and Wigand’s (2012) online shoppers, who indicated that “website efficiency, website reliability, information quality, responsiveness” and a personalized experience were all key to a high perceived service quality of a digital experience.

Further consumer behavior traits.

Peitz and Waelbroeck conducted research in 2006 indicating that the music industry could further benefit from downloading services instead of being opposed to them, all to support consumers and what consumers are looking for. Peitz and Waelbroeck (2006) offered the idea of sampling, which argues that “downloaders use the downloaded files for sampling in order to make more informed purchasing decisions.” The researchers believe that illegal downloads do not discourage actual purchasing behavior, but that illegal downloading can lead to legal behavior by offering consumers an idea of what they want. This idea was also present in research conducted by Kinnear and Terrel (2001). In their research, over 40 percent of MP3s legally purchased by respondents “were by artists who music they would not ordinarily purchase” (Kinnear & Terrel, 2001). These respondents had the ability to safely sample music from artists they may not want to initially pay for; respondents in the Kinnear and Terrel (2001) research also
said they were likely to continue buying compact discs. Sampling is an important component of the digital experience. When it comes to sampling, music has to be understood as an experience. “Music is an experience good where horizontal product differentiation and taste heterogeneity are important” (Peitz & Waelbroeck, 2006). One of the key aspects of sampling is that it brings consumers and sellers together. “Samples can be used to build a relationship between consumers/buyers and sellers” (Peitz & Waelbroeck, 2006).

Rossman (2012) also indicates that there is significance in a personalized listening experience. Different groups, including Pandora Radio’s Human Genome Project, have worked to make each experience unique for users (Rossman, 2012). However, this importance of personalized listening could contribute to illegal downloading, as that power to sample is a personalized experience. Chen, Shang, and Lin conducted a study in 2008 looking at other reasons why consumers illegally download music. They analyzed this from three areas: consumption value, fashion, and ethical decision-making. “Understanding why or how an intention to download develops becomes one of the ethical issues for music companies” (Chen, Shang & Lin, 2008). Record companies need to find ways to make a legal product personalized and valuable for consumers.

“Downloading of music files can be viewed as a kind of music consumption” (Chen, Shang & Lin, 2008). Whether this is through an online radio station, an on-demand stream, or through a cloud, interactions with music files equate to an interaction with a product that a given consumer wants (Anderson, 2011). For many people, listening to music is important at a personal, social level. Listeners use music as an accessory to develop who they are. It is not just about getting the music, but using that music as a tool of expression. “Music is fashionable and always conveys features of social utility that satisfy interpersonal needs” (Chen, Shang & Lin,
This use for music can possibly influence whether or not a person downloads music or has physical ownership of it, whether as a compact disc or a record. In some cases, there is still a desire to own a physical product, like a vinyl record with artwork, because of what that product itself represents to a listener (Wong, 2013). “People acquire and appreciate music mainly for reasons of enjoying playfulness, collecting music, killing time, and relieving feelings and pressure, gaining recognition among and interacting with peers, etc” (Chen, Shang & Lin, 2008).

Depending on what a consumer’s priority is, a physical copy of an album may mean more to him or her than a digital file. At the same time, a change in perceptions about digital files could add meaning to those files, especially those that exist in a cloud and are owned by a company, not the consumer.

This is one of the many reasons why downloads and physical components may not equate for music listeners, according to Chen, Shang and Lin’s study. Users may not see the two as equals or substitutes. “Music download, however, may not always be substitute for music CDs” (Chen, Shang & Lin, 2008). Their research showed that many users who were on the Internet consumed their music on a compact disc and through peer-to-peer services at the same time. There was a strong heterogeneity of consumer behavior in the relationship between music on a compact disc and in peer-to-peer systems (Chen, Shang & Lin, 2008). Another key finding that Chen, Shang and Lin (2008) found was the possibility that music files are perceived differently from physical versions of recorded music. Music files, in some cases, are likely to be perceived as the less valuable object in music collecting. Part of this can come from a disconnect in the purchasing process. Whereas a consumer has a connection with another person when he or she is buying a record from, the same is not true in a digital interaction. “A consumer can only purchase digital content by establishing an account with the content provider” (Wong, 2013). It
is not typically a tangible relationship. This can affect the buying process as well as perceptions about the product being bought in that situation. If there is not a human connection that results from the purchase, as in the case of a vinyl record or a cassette, the mental connection to a digital download may be weaker. There is nothing physical about the purchase to show, and no interaction occurs with anything except the screen.

**Consumers as value seekers.**

A key thing to remember about consumers is that they are value-seekers. “Consumers are value maximizers when choosing between buying and downloading music” (Chen, Shang & Lin, 2008). Whatever the consumer feels will be more valuable is ultimately what he or she will choose. This can vary from person-to-person. Chen, Shang and Lin (2008) state that they have the belief that, “consumers should have the right to buy just the music they like, instead of buying a CD with unfavorable and/or ill-produced songs.” Giving consumers flexibility empowers them and allows them to make the best decisions for themselves and, ultimately, for the musicians whose albums they want. The study showed that respondents were willing to spend some money, typically a small fee, to be able to download as unlimited amount of music that was exactly what they wanted (Chen, Shang & Lin, 2008). Consumers overall preferred paying for selectivity.

**Hallmarks of digital music services for consumers.**

There are two hallmarks of digital, according to Sandulli (2007): Variety and convenience. Consumers are concerned with variety, as indicated in the study done by Chen, Shang, and Lin (2008) where consumers were willing to pay for more selectivity and thus a wider variety in music options. Convenience is tied to this, as that wide variety needs to be easily accessible and in a service that is easy to navigate and understand in order to maximize value. In
addition to the two key areas of variety and convenience, Sandulli (2007) also argues that digital encourages discovery, again supporting the ideas from the research by Chen, Shang, and Lin (2008) that variety is essential. That variety only grows when consumers have easy access to discovery and can use services to find new artists and songs. This also supports the idea of sampling proposed by Peitz and Waelbroeck (2006). If consumers are looking for variety, they can sample new songs before committing to buying. When a consumer finds an artist he or she likes, then the consumer can commit to spending money on that artist after sampling through a digital service. Sandulli (2007) writes that another experience that respondents identified as essential is the ability to share playlists in a digital platform. To respondents, sharing a playlist is like sharing an opinion and an experience (Sandulli, 2007). Sharing playlists enables sampling and discovery, all giving digital consumers what they want.

Another area that Sandulli (2007) identified as important to some music consumers is the idea of assortment, or the wide range of songs and artists available to a listener. Assortment was mostly influential for peer-to-peer users, as peer-to-peer users tended to be the most digitally savvy and want to be able to pick any music, whether it is a specific song or an entire album or discography (Sandulli, 2007). Sandulli (2007) writes that it is easier to find a specific song online than on an album in a record shop.

“Although the process has not always been smooth, the history of the music industry with respect to technology is a model that should be emulated, not feared” (Krasilovsky & Shemel, 2007). The music industry has typically shied away from technology, and it has often received criticism for its lack of innovation and anticipation. Krasilovsky and Shemel (2007) argued that the music industry needed to better adapt to technological change and put music in forms and on services that consumers were looking for. While record companies initially failed to embrace
digital, the Internet has the potential to be a huge part of their business plan. Music has become a public good with its ease of availability online (Kinnear & Terrel, 2001). The public now has an expectation that it can get music whenever it wants wherever it wants by logging onto a computer. One major benefit for recording companies who embrace digital: It can help new artists to become known at little cost to the companies themselves, allowing them to take more risks in developing and signing new artists (Bhattacharjee, Gopal & Sanders, 2003). Consumers are also able to take risks in testing new artists and musical genres (Kinnear & Terrel, 2001). Plus, “other digitized goods are increasingly shared as technology improves,” as music is not the only product that has shifted from physical to digital in recent years (Bhattacharjee, Gopal & Sanders, 2003). Part of the appeal of a digital good, especially a good like music, is the low reproduction cost to consumers. “Digital goods have high initial production costs, and very low – approaching zero – reproduction costs” (Bhattacharjee, Gopal & Sanders, 2003).

Consumers want unlimited music options in platforms that are already available to them. As consumers work online on their computers, that is where they want to find music. Consumers are shifting from physical components, like compact discs and records, to digital services more and more frequently, especially as more digital services are available. The growth of services including Spotify allows users to listen to as much music as they want without ever having to own any of that music. The question that remains to be answered is why consumers are shifting to digital, and how the shift to digital is affecting them if they lose, or as they lose, a sense of physical touch with their music.
Theory

Dematerialization of Artifacts Theory.

Dematerialization of artifacts is a theory with roots in the art and theatre worlds. It has recently found applications in the music industry, with more “musical artistic practices based on ‘programming’” (Suvakovic, 2010). As music shifts from physical hardware like records and compact discs to digital services housed in a computer, dematerialization becomes more applicable to this industry.

A theory of dematerialization was first introduced in the mid-1960s as a facet of the art world, which was beginning to deal with significant changes in how purveyors of art were interacting with pieces (Lippard, 1973). Photographer Ed Ruscha spoke in 1966 about how his photography was changing; instead of people appreciating the photographs as art, they were becoming a commercial commodity. “I think photography is dead as a fine art; its only place is in the commercial world, for technical or information purposes” (Lippard, 1973). The earliest applications of dematerialization focused on a shift from artistic meaning to commercialism and a loss of meaning. These early uses of dematerialization pre-date the dominance of the screen that would come in later years, but show how ideologically dematerialization has existed for almost sixty years.

Yoko Ono, while giving a lecture at Wesleyan University in 1966, also spoke about the aesthetic shift that was happening in art, although at the time she admitted that music had not been affected by dematerialization. Her speech predated the onslaught of technology that would arrive within 50 years. Ono spoke as to the importance of embracing a dematerialized world and appreciating art beyond its physical being: “After unblocking one’s mind, by dispensing with visual, auditory, and kinetic perceptions, what will come out of us? Would there be anything?”
Ono demonstrated in her speech that art could have meaning beyond its physical presence. It has meaning beyond hanging on a wall and can change meaning for each person.

Dematerialization developed steadily through the 1960s and 1970s, following examples set by artists including Ruscha and Ono. The theory initially focused on the way pieces of art were changing in use and interpretation. Art was believed to be dematerialized as it found commercial uses outside of galleries and as those who were interacting with the art found new ways to interpret it (Lippard, 1973). The development of the theory was also aided by religion, as changes in spirituality have increased the debate as to what physical objects hold meaning, if they do (Meyer & Houtman, 2012). Historically, religion universally has emphasized immateriality with a focus instead on the spiritual. However, many religions have statues and other objects that are assigned meaning because of the objects’ ability to be touched. These objects, by being touched, gain meaning (Meyer & Houtman, 2012). Art and religion both aided in the development of this theory as both tackled questions of touch as having meaning.

The final decades of the twentieth century lead to an updated understanding of dematerialization by incorporating computers and their influence over art and music. Helfand (2001) writes that users are adapting to a world that is essentially intangible, and users are learning to work in a world that embraces that intangibility. The growth of the theory included understanding how users adapt to the new space. “It is not space that demands our attention now so much as our representation of space” (Helfand, 2001).

A “postmedium” or “metamedium” has also recently been identified as a part of dematerialization (Suvakovic, 2010). The two terms can be used interchangeably in discussing new forms of media as they emerge. A “metamedium” is “identified with computer multimedia
and digital communication networks, such as the Internet” (Suvakovic, 2010). Metamedia emphasize new uses for data, not necessarily new interpretations of the world. Previous forms of new media had a specific emphasis on explaining the “external world in a new way,” but metamedia instead rely on creating meaning for “the imitation and display of the sensuous effects of all other media” (Suvakovic, 2010). A piece of metamedia changes the relationship, or establishes a new relationship between, the computer and its user. It exists only digitally, with no physical component except the screen that it is viewed on.

Magaudda (2011) writes that while de-materialization has existed and been developed as digitalization has become more commonplace, the theory has yet to be appropriately applied to any consumer goods. “Cultural goods” and the impact of digitalization have not been fully understood (Magaudda, 2011). Magaudda (2011) did some initial research on understanding digitalization in the music industry and the influence of dematerialization by interviewing Italian music consumers between the ages of 15 and 30. He found that in the midst of digitalization, music consumers felt that the primary shift was in the hardware they were using (Magaudda, 2011). Styven (2010) conducted similar research that showed that at the time, physical storage items like compact discs were still preferred by users who were only beginning to go online to listen to music.

Yet dematerialization begs to have the “why” question answered. While Styven (2010) showed that many consumers were still buying compact discs, there has been an undeniable growth in digital music platforms and services. Why are consumers moving to these platforms? Why are they streaming music without ever owning it?
Chapter III
Methodology

Research Questions

• How has the meaning of music consumption changed for consumers who do not have a physical component to interact with?
  o Does the screen replace touching a CD? Does hardware replace a record?

• What meaning does a digital file have?
  o How does meaning change from physical to digital?

• What does touch mean to consumers who engage with music?
  o How does touch with a record or CD compare to touching a computer or cell phone?

In-Depth Interviews

In-depth interviews were conducted for this research. Sharan B. Merriam (2009) writes that the “main purpose of an interview is to obtain a special kind of information” from respondents. The information being gathered from an interview cannot be observed in everyday activities; the goal of an interview is to understand how people interpret the world around them, which can only be realized by talking to them (Merriam, 2009). Respondents must be given an opportunity to speak to help the researcher understand the word (Irvine, 2011). It may not be obvious from watching someone interact with a digital music service how his or her sense of touch and interactivity has changed to accommodate the growth of the screen in the music industry; however, talking to that same respondent was able to reveal not only how the sense of touch has changed but also the respondent’s feelings about the change.

The goal was to conduct eight to ten in-depth interviews across three age groups, for a total n of 24 to 30 respondents. Interviewees had to self-identify as regular music listeners who
would have multiple interactions with at least one listening platform. The interviews were semi-structured. As Merriam (2009) writes, “Interviewing in qualitative investigations is more open-ended and less structured.” This allowed individuals who were responding to shape the outcomes of the research. The responses allowed the respondents to “define the world in unique ways,” which is essential for this research with digital music services (Merriam, 2009). Since this research will be entering new territory by combining a theory from the art world with the music industry, the respondents needed to be the ones shaping the world and the understanding of it that is resulting. An interview guide was developed to give each interview the same basic structure and talking points; however, the interviews overall were allowed to develop in a conversational manner in order to get the best, most natural responses.

Table 1: Interview respondents.

<table>
<thead>
<tr>
<th>Age Group</th>
<th>18-25</th>
<th>26-35</th>
<th>36 and older</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Respondents</td>
<td>9</td>
<td>9</td>
<td>8</td>
</tr>
</tbody>
</table>

Interviews were also ideal because “we need a methodology that can deal with aspects of and phenomena in the human being and the social and cultural fabric as they exist and are experienced in the human being” (Witz, Goodwin, Hart & Thomas, 2001). Interviews allow researchers to talk to a variety of people about any given number of experiences. This research pulled from a wide range of people, with different age groups included and broken apart to give a sense of the overarching possibilities of the research. The interviews were not limited to
millennial respondents or to a certain generation. Instead, the targeted age groups were respondents 18 to 25, 26 to 35, and 35 and older.

Respondents were chosen using a nonprobability, purposive sample. Merriam (2009) says that nonprobability sampling is typical in qualitative research because “probabilistic sampling is not necessary or even justifiable” in this particular field. The goal of this research was to develop a greater understanding of respondents’ varying interactions and how they influenced an understanding of dematerialization of artifacts theory, not to apply this research across populations or to answer a question like “How much?” (Merriam, 2009). Qualitative research looks for rich responses that shape data in new ways (Irvine, 2011). Purposive sampling involves having criteria for respondents; in this case, respondents had to actively engage with digital music services and have specific ones that they used and were able to discuss. The specific type of purposive sample that was used was a snowball or networking sample. Merriam (2009) defines a snowball sample as “locating a few key participants who easily meet the criteria you have established for participation in the study… you ask each one to refer you to other participants.” Initial respondents were recruited in person, through email, and on social media. Those respondents then helped to build a network of participants, again with the criteria that they all engage with digital music services and could talk about their changing interactions with the services and with the music they listen to. The ideal situation was to have three groups of respondents who fall into three different age categories. The goal with different age groups is to understand how these different groups interact with a digital service compared to other music listening platforms, if there was any difference across ages at all.

Test interviews were done for each age group, to account for the different responses and probes that may be associated with each group. Interview subjects were recruited by face-to-face
interactions and through email messages, as approved by Kent State’s Institutional Review Board (IRB) in October 2013. When subjects committed to the interview, they were given the opportunity to arrange for the interview at a time that was most convenient for them. Interviews were expected to last up to an hour, which respondents knew as they were being recruited. An hour was allotted because this allowed time for probing as well as for natural conversation, as encouraged by Irvine’s (2011) research on qualitative methods. Each interview was recorded using an audio recorder, and the interviews were only recorded once the respondent had given permission. Recording was recommended, as it gives greater accuracy than simply taking notes, although notes will also be taken as interview respondents talk (Witz, Goodwin, Hart & Thomas, 2001). Interviews were conducted on Kent State University’s campus in Franklin Hall, unless an interview subject requested a different venue. Once the interviews were conducted, the recordings were played back for transcription and analysis. Respondents were notified if there were any follow-up questions, which was clearly explained in the initial email message and recruitment information and was explained again before the interview began. Interviews are kept confidential, with only demographic details being recorded. Respondents will only be identified by age if necessary, and respondents are never named. Respondents signed a consent form at the beginning of the research, and respondents knew that they could leave the interview at any time for any reason.

**Personas as a typology.**

To best understand the findings from this research, a typology of personas was developed. Personas are used to better understand groups of people across a given spectrum. Personas are often developed in user experience situations to understand how different consumers interact with technology and the kinds of use situations that exist (Van Velsen, van
Gemert-Pijnen & Nijland, 2012). However, personas are also used in applied research in marketing to give depth to target audiences who are interacting with marketing and advertising messages (Leibtag, 2013). In both situations, personas develop from qualitative research grounded in secondary research to give a holistic view of a range of consumers (Van Velsen, van Gemert-Pijnen & Nijland, 2012). Because respondents spoke about three key themes in varying levels, development of a typology of personas makes the most sense to best understand this research and its implications in digital music technology.

Personas fit into a typology, which is a way of analyzing data across a range of variables and can assist in a comprehensive understanding of a given topic (Coursaris, Osch & Balogh, 2013). For example, in their research developing a typology for social media messages, Coursaris, Osch, and Balogh were able to align aspects of social media messages with seven different kinds of messages and used the typology to understand the range of messages that three kinds of marketers could use. Personas can be used as a typology to understand how varying personality traits, like messaging traits in social media, have variance and influence consumer interactions. Other research in the music industry has come close to developing personas, such as the study by Molteni and Ordanini (2003) that incorporated types of music consumers and compared them against the typical adopter S curve. The findings here build on that and similar research, combined with the interview results, to illustrate four personas that can be used to understand three hallmarks of music consumers today.

Chapter IV

Findings

Hallmarks of Consumers
The respondents in this research demonstrated three consistent tendencies as music consumers, across generations, occupations and genders: an appreciation of innovation as a supplier of convenience; a perception of the value of music and associated products, whether in a physical form or digital; and a use of physical and digital artifacts as relating to a personal sense of fashion. These three behaviors manifested themselves across every interview; there were limited differences among age groups, and none that were significant enough to note. However, depending on the consumer, one of these behaviors was often more suppressed, while another proved dominant. In some cases, for example, convenience was more appreciated than fashion, but the fashionableness of an object was not lost or rejected completely. The perceived value remained a constant; it changed in relation to the fashion and convenience. Every respondent embodied the above qualities; individuals simply varied in their appreciation of a given one. One area where the respondents in this research did not make a distinction was between consumption and usage. The respondents spoke at length about usage and the different services they interact with; however, few spoke at length about the actual buying process, unless it was in relation to a specific album. There is no gauge for how many albums or songs the respondents in this research buy in a given time frame. Also of note is the fact that few respondents spoke about illegally downloading music from torrents or file-sharing hosts. Instead, respondents generally spoke about the different legal services they interact with, in addition to the compact discs and records they play.

**Innovation creates convenience for music consumers.**

Respondents across age groups agreed that getting music in a convenient manner was important. Convenience was one of the two hallmarks of digital that Sandulli (2007) discussed, and the idea of convenience in musical interactions remains important and present. For most
respondents, regardless of age, this meant adapting to new technology that allowed them the quickest access to a song or an album. As one respondent in the 35 and up group said, “Everything is instant. You want music now, just like everything else.” The advent of other technology also shifting online has helped consumers to adopt new music services, and vice versa in many cases. This adoption was documented in 2003 in the research by Bhattacharjee, Gopal, and Sanders (2003), and it showcases the importance of convenience. This sentiment was echoed consistently, although the definition of convenient varied. For those in the 18 to 25 group, “convenient” typically equated with the ability to get a song from iTunes without waiting for it in a physical form or by being able to find it on a streaming service like Pandora or Spotify. For the 26 to 35 age group, “convenience” was similar, with more emphasis on the ability to turn on the radio in a car in addition to easy access to digital platforms like Spotify. The 26 to 35 age group overall preferred terrestrial and Internet radio, while the younger group was more likely to identify a streaming service or MP3 as their top form of convenience.

The oldest age group had the most varied definition of convenient, with most citing services like iTunes as the easiest way to get music. However, half of these respondents also agreed that the radio was the easiest way for them to hear music and was also a way they discovered new music regularly. This oldest age group was the most likely to use both a streaming service and terrestrial radio, as no clear preference was determined from their responses. The preferences were clearer within the younger groups, but the theme of convenience itself remained dominant regardless of age.

**Meaning is perceived both physically and digitally.**

Music has meaning in both its physical and digital forms, according to respondents in this research. Many acknowledged that physical components, like vinyl records and compact discs,
come with different expectations than digital components, like their MP3 players. However, while the meaning was not necessarily the same, these objects all held meaning for different people. This is similar to the research by Meyer and Houtman (2012) in relation to religious objects. Religious articles can have meaning, as can their spiritual counterparts. Similarly, meaning for many respondents in this research is derived from their perceptions of what the given object should do in its given space and form. For example, the expectations for vinyl records are different from the expectations of an MP3 player, and the perceptions as to what those objects can accomplish are also different. As one respondent in the youngest age group explained, the expectations for playing a compact disc in one setting were vastly different from streaming digital files in another setting. However, while the expectations for the components changed, a general appreciation of music and the need to have it constantly were also echoed throughout this research. Respondents in this research did not make many distinctions between vinyl records and compact discs, though the two storage options have their differences. Respondents in this study chose instead to compare physical means with digital means overall, and so considered compact discs and records in the same family and of comparable usage. This also connects with the trend of most respondents spoke about usage and not about consumption or actual buying habits.

Essentially, with records and compact discs, there is a greater sense of ownership and a sense of pride in a given artist. When respondents discussed ownership, it was almost always in regard to a specific artist. Usage was focused on more frequently than ownership, but ownership became an important element in connecting with a specific artist. Ownership was associated with physical components, which were vinyl records and compact discs; usage was in relation to all available platforms. No respondent made the distinction between owning an MP3 and streaming
an MP3. Instead, ownership was the core of relating to an artist that a respondent cared about or felt a connection with. Respondents acknowledged that they would go out of their way to buy certain albums by an artist to support him or her. Respondent 1, a female age 28, who does not purchase compact discs anymore, could see purchasing a disc in this capacity: “I could see it if you’re a really huge fan of someone, then yes.” In addition to a sense of appreciation for a given singer, physical albums also represent a higher quality of music playback to some respondents. Respondent 2, a male aged 22, discussed at length why he burned compact discs for his car instead of playing MP3s that would have had a weaker sound due to the playback system in his vehicle. It came down to the fact that, in his car and with his stereo system, he could get a higher quality experience by playing compact discs than by streaming MP3s from a player or even through a radio service.

Yet with digital components, there is a greater sense of control over what is happening. While physical components offer a sense of permanence, MP3 players and computers give a greater sense of control for users. With an MP3 player, respondents could choose the songs that played, after pre-loading the player with handpicked music. There was no surprise in what would be on the player, which was an appeal to many respondents. They liked hearing the artists they liked. When they wanted to hear a new artist or experience a new kind of music, digital makes it feel safer, and this reflects the idea of sampling as proposed by Peitz and Waelbroeck (2006). The consumers are still in control of the newness of the experience, but they have the ability to try new things and feel adventurous in a space they understand (Peitz and Waelbroeck, 2006). Applications like Spotify and Pandora make it easy to explore in a danger-free environment where little risk (and money) is involved. Earlier research showed that this was a major reason for the growth of peer-to-peer music services; they were the original sources of safe sampling.
Consumers have consistently looked for this in new digital services (Kinnear and Terrel 2001). Digital artifacts give the listener the most control, while tangible artifacts give listeners a sense of communion with artists and with sound quality.

Physical and digital each have their own expectations and perceptions for respondents in this study. However, what became clear through many discussions was that both hold meaning for listeners. Physical artifacts, whether vinyl records, cassettes, or compact discs, represent a physical connection to an artist or even to a memory. Many respondents spoke at length about their memories of buying a specific album. When Respondent 3, a male aged 21, discussed holding the last album he bought, he spoke about remembering the whole process of buying it and knowing even then what it would mean to him as time passed. “Even if I don’t love the album, I can hold it up and look at it and know what it meant to me.” For others, the meaning is even deeper – holding an album takes them back to a certain time. This is one trend that showed up as respondents aged. Respondent 4, a female aged 53, talked about how going through records reminded her of growing up with her sister in a specific house at a specific time. “Certain people want their certain particular records. They associate it with a certain time in their life. Whatever we have, it’s jointly owned, by me and my twin.” It was not necessarily the act of buying the record or listening to it, but having the physical component itself that lent the record to an overall sense of time.

With digital, the meaning that appears is tied to both the physical aspect of the player and the metaphysical aspect of the music. Almost all of the respondents who talked about the meaning of digital actually talked about the meaning of the music itself. Without having a sense of intimate touch with an object, they spoke about songs themselves and what hearing them meant to them. At that point, the conversations often transcended from a discussion about
material items and their value in the present to the ongoing meaning of specific songs and how songs have meaning and connections beyond a physical sense.

**Fashion plays a role in appreciating physical and digital.**

An important aspect of meaning that is derived from music products is associated with their fashionable qualities and the way they factor into one’s self-identity and development of a sense of self. The idea of what is and is not fashionable comes from social influences, as explained in the study by Chen, Shang, and Lin (2008). Most respondents admitted to using objects related to music to communicate something about themselves and to present an aspect of themselves that might not be obvious otherwise to other people. Without a social influence, the music object may have no meaning and the aspect of fashion would not be as important or likely even be discussed. “Prior to social interaction, preferences of products may be weak or nonexistent” (Chen, Shang & Li, 2008). Because digital and physical means both encourage social interaction, either by sharing or by buying, a sense of identity is developed in each interaction. This was important for respondents in this research.

For some, this meant displaying vinyl records and using the artwork from vinyl records to advertise the kind of music they liked and the artists they were supporting. For others, sharing playlists came up frequently. This might be in digital means, like publicly sharing a Spotify playlist; it might also be through physical means, like creating a playlist and burning it to a disc for someone. In many cases, it involved playing certain music and exposing friends or other acquaintances to the music.

For example, one question that respondents discussed involved their ideal listening situation and what it would involve. Respondent 2, a male aged 22, discussed how his ideal
listening environment was in a room by himself in a place where he could relax; however, Respondent 3, also a male and aged 21, talked about his desire to be in an environment where he could share his music with his friends and see their reactions to the music. This respondent also talked about the experience of buying a physical album and how that album could signify much to him and to those around him. Further, this respondent was also interested in playing music and using music as a performance piece. Clearly, this latter respondent has a deep involvement in the fashionable aspects of music and the social feedback it can provide him, as suggested in the study by Chen, Shang, and Lin (2008). The former interview subject has a different experience, one that is more personal and relates better to the study by Meyer and Houtman (2012); the former subject does not find value in the fashion so much as the listening experience itself. Both find meaning in the music and associated products, but the second respondent in this example is tying an outward identity and a sense of self into the interactions. His experience is not a shallow one; it just does not have the personal, internal interactions of the first interviewee.

**Personas**

These discoveries support the development of four distinct personas that can be used to better understand current music consumers and the directions they are heading. Based on respondents and their individual preferences for the three characteristics above, music consuming individuals can be put into one of four categories to best understand their purchasing behaviors, expectations, and sense of self, and how these influence their buying decisions. These personas are useful in developing a way to speak to these consumers, and even more useful as a way to understand where the music-buying consumer is going to be purchasing music in the future. The value of the music and artifacts related to it is the constant; fashion and convenience become the poles for what determines how a persona is shaped.
The expressive: Physical and fashionable.

The expressive is the first persona to come from respondents’ answers and discussions. Expressives put the most emphasis on the physical attributes of a musical product. For them, the outward physical expression of the music is the most important element and it is what they use the product for. Meaning, for an expressive, comes from what the perception of the physical object will be to other people. The expectations for a product’s performance are low, based on perceived service quality as explained by Kwong and Park (2008), because all that an expressive needs a record or MP3 player to do is represent a part of themselves to others. This does not necessarily mean it has to perform a certain act. Its existence is enough. Additionally, for consumers driven by fashion and the physical sense of touch, convenience is not the most important element of the musical piece. For example, Respondent 5, a female aged 20, discussed how using an MP3 player while running influenced not only the ability to keep pace, but also acted as an outward symbol of her whole experience for others to see. It showed that the participant had more going on than just the physical act of running. The outward representation is important, and the meaning of the physical object comes from being able to see it and touch it and have others interact with it. A typical interaction with an expressive would involve them rifling through their vinyl collections, allowing the explorer to touch each record, see its condition, and interact with the accompanying artwork. The most important parts of the interaction focus on how the explorer perceives the collection in relation to the expressive. The expressive has accomplished something if the record collection shapes the explorer’s understanding and perception of the expressive as an individual. The sense of touch is important to that development.

The promoter: Beyond material fashion.
Promoters and expressives are similar in their desire to show how fashionable they are with their musical tastes and preferences. However, the promoter focuses his or her fashion sense on the immaterial aspects of the music – they care about others knowing what they are listening to, regardless of the platform. Here, music becomes more meaningful than the physical object itself. This person cares about specific artists and is willing to promote them through digital means without a physical component attached because the artist is what is helping to identify the promoter as hip or cool or interesting. This category of user is much more invested in what the product should accomplish, so expectations are higher and performance is important. If, for example, a digital service should malfunction, this directly affects how the consumer interacts with the interface and the audience he or she believes he or she has. These fans adapt quicker than expressives, as promoters are more adept at understanding how digital and the metaphysical can help them transcend status. These users create playlists and share them; the ability to make a digital playlist and share it with the world is of incredible importance. However, its importance is derived from shaping one’s image of oneself within the context of the product. Respondent 6, a female aged 22, discussed using online services, including YouTube and Spotify, to discover cover artists and then building playlists to promote them. “I like hearing songs in a new way, and I like adding to my playlists that I share.” While some of the respondent’s friends were not sure how to interact with a playlist of covers, the respondent’s constant sharing and promoting, in a safe digital environment, encouraged their own adoption of the artist.

A typical activity that a promoter would do would be to create a playlist based on an artist he or she just discovered and to share that playlist with as many people as possible. Because the goal is to broadcast their taste, the promoter would create the playlist in a platform like Spotify, where content is easily shareable. The playlist would be created around a given
artist, and would likely include similar artists who are slightly more obscure – again, this is all in
the interest of promoting one’s taste. Then, with the playlist complete, it can easily be shared
across social platforms including Facebook and Twitter. Spotify’s integration of these
applications makes it a go-to destination for promoters. A service like iTunes, which tends to be
more personal and less dependent on social networks, is better suited to a different persona – one
that cares about the music itself, and less about other people’s interpretations of the music in
relation to themselves.

The true fan: Physical and meaningful.

Where promoters get a sense of satisfaction from promoting artists in any means
necessary, true fans see themselves as just that – dedicated fans who go the extra distance to
actually buy physical artifacts related to their favorite artists. As Respondent 6 explained,
“[Purchasing a] CD is like, you really, really like that artist. You got up, drove to the store, and
you bought it and wanted that physical copy.” Many consumers fall into this category, and many
respondents spoke at length about buying an album and remembering the experience because it
connected them with their favorite artist, if only for a moment.

For these users, convenience is not as important as actually going through the steps to
purchase an album. Whether on vinyl or compact disc, the memory of buying the album is what
is important. It is what is remembered long after the purchase occurs, and it is an important piece
of the listening experience. True fans do not care as much if other people know about the buying
experience; the fashion element is lessened here, and the meaning comes from that momentary
connection with the artist and the feeling of supporting a creator who has affected the listener in
some way. Respondent 5 discussed seeing a specific artist every summer, almost as a ritual. Part
of that ritual is knowing all of the songs, which always includes new songs. “For me, having that
entire CD is important, I go to the concerts and I want to know all the songs.” The tangible aspects of the album force the true fan to know all of the songs, instead of picking and choosing the songs as one can with a digital platform. Then, the physical element also contributes to the experience of an actual interaction with the artist in the form of a concert. “When you’re at a concert, you don’t get to touch the artist. You get to have the feelings of them being there and being in the moment,” which for a true fan, is a beneficial exchange, aided by the ability to know every song.

Respondent 2 explained that he remains connected to compact discs, even as others shift away, because of the permanence of them. Even if the respondent’s computer were to fail, even if an MP3 player were to break, the compact discs would still remain and be symbolic of his interactions with artists and their music. “I still have tons of CDs from when I was younger. That’s something you can have forever. I don’t know how long CDs will be around, but I’ll have them.” Respondent 7, a female also aged 22, explained her connection to her compact discs in a similar way, by explaining: “When I was little, my sister would make me sing duets [of one of their favorite artists, M2M] with her, and we still have the CD we sang to. I would be sad if that was gone.” For these respondents, the true fans, the permanent, physical aspect is important because it connects with memories of artists and beyond.

**The enthusiast: Meaning beyond the physical.**

The enthusiasts are the most influential of the personas in this research. They are the quickest adapters to new technology, with the highest expectations and deriving the greatest sense of reward from convenient new technologies. These are listeners who want to hear as much music as possible at any given time; these are the users who want music at their fingertips in any medium. An enthusiast takes on an influencer role by testing the waters for other listeners and
users. Meaning is not lost when music is seen as a digital file or even stored in a cloud; music itself is what has meaning, whether associated with memories or as a relaxant or as entertainment. Respondent 4 went so far as to discuss how deep the meaning of the music was: “I hear a lot of music because I listen all the time. And if I really like the song, and I’ll look up the words and lyrics, because I want to know the words exactly right, then I’ll usually want to have the song.” The song itself is what has meaning for this respondent, who is an enthusiast in her desire to have music all of the time. Their thoughts are best summed as Respondent 8, a male aged 29, explained: “I don’t have a preference for how I listen to music. I just use whatever format is most easily accessible at the time.”

Music’s existence is solely important, and as long as it can be accessed, it can derive meaning. This is the clearest example of dematerialization theory at work with consumers, and it is where more and more consumers are heading. The majority of respondents spoke about access to music itself as being important. For some, this meant having instant access to the radio while driving; for others, it meant being able to open Spotify while at work. For others, it meant a combination of both, combined with the ability to safely explore new artists and songs and to add them to their repertoire. And, of course, control is essential with an enthusiast who is using the newest technology. Being able to take advantage of the control aspects is enormously important, as Respondent 2 discussed: “I like the randomness of Pandora as well; it learns about you, and you can build your own station. So for instance, my Atmosphere Pandora, it only plays [rapper] Atmosphere. I trained it to do that; I have thumbed down everything that’s not Atmosphere. [I like] the strong sense of control that you get with Pandora.”

One concrete example of an enthusiast came again from Respondent 4, a female aged 53, who goes to her car for her lunches and listens to music ravenously: “I always pack my lunch
and I go and sit in my car and I listen to the radio. I feel good when I’m in my car; I’m singing, it’s great.” This is exactly what an enthusiast would do – whatever it takes to hear music at all times, and for all purposes. “The manner that I get it doesn’t matter; but music, music is everything. The music is what makes everything.” As Respondent 1, a female aged 28, explained, “Whether digital or physical, you still have a collection of music. As long as it is accessible, I don’t care.”

The findings in this research clearly answer the research questions that were initially proposed to shape the research. For consumers in this research, a screen did not necessarily replace a physical component like a compact disc; instead, as is reflected in the personas and their varying degrees of interaction with objects, screens and compact discs tend to live in harmony. Each element has its place within a listener’s library or repertoire. Meaning for consumers in this research is found with each object they interact with; the meaning changes based on the object, and the meaning comes in great part from their personal experience as one of the personas.

A digital file has meaning that differs greatly from its physical counterparts. As demonstrated by the promoter, for example, a digital file can aid in self-expression and can become a manifestation of what a user wants others to see of themselves. The digital file’s meaning does not come from ownership but instead from its broadcasting and its use in a space where others can see it. At the same time, a digital file has meaning for an enthusiast in that it becomes a representation of an easy way to access music – which is what the enthusiast ultimately cares most about. The digital file does not have to exist in a tangible form to have meaning for today’s consumers. Consumers in this research understood the importance of a digital file and its uses without interacting with it beyond their computers or their iPods. And, as
mentioned previously, a sense of ownership was not as important with digital as was the usage that it experienced. In this research, consumers focused almost exclusively on usage and control when talking about digital products. Usage and control did not need to be sacrificed because of a lack of ownership, and it was universally discussed.

The sense of touch is one of the most personal elements of this research, and something that many respondents talked about having a strong sense of. Those respondents who identified as true fans and expressives especially tended to talk about a sense of touch as something they had a keen sense of and that was important for them in purchasing music. Touch mostly came up in discussions with true fans, people who went out and bought records or compact discs and who still used them to connect to different times and memories. In addition to a sense of touch connecting with specific artists and albums, respondents who played music and did not just listen to it also discussed touch. Touch was an active element of a music-loving experience for some respondents. Even this was not age exclusive, as it included one respondent who was a 21-year-old male and another who was a 63-year-old male. When discussing touch in regards to a computer or an MP3 player, there was little emotion and instead a sense of utilitarian importance. Computer hardware makes it easier to control the music that is being played in a number of settings and, connecting with convenience, this became important for most every persona identified.

Chapter V

Discussion

The personas above represent the different ways in which the three cornerstones of consumers can appear. These have implications for not only understanding dematerialization theory as it relates to the music industry, but also how dematerialization theory has greater
implications beyond the music industry. These personas can be used to understand how to target different kinds of consumers in the music industry to best reach them, while also expanding knowledge of the personas to develop understandings of consumers overall.

Dematerialization theory strives to understand how pieces of art are understood and appreciated as they lose physical value (Magaudda, 2011). The theory questions whether artifacts’ only meaning comes from their existence in a physical space, and it further seeks to understand where meaning comes from when a physical presence is lost. All four personas, and the three hallmarks associated with them, demonstrate the ways dematerialization is becoming an important theory in the creative world in this century. Previously, dematerialization was a concept best understood as a shift in aesthetic understanding, as art became advertising (Lippard, 1973). Now, it truly can begin to explain consumer interactions and feelings with files and purchases that exist only in a cloud that can never be touched. Dematerialization shows how consumers are not afraid of the immaterial and are learning to embrace it, while still retaining affection for the physical artifacts that they have been accustomed to for so long.

**Application of personas.**

The expressive persona, who as previously described prefers music artifacts in physical forms for the sake of expression, is the persona least driven and affected by dematerialization. However, even this persona interacts with music in a digital space. An iPod is still a fashion accessory; an MP3 player can still be displayed as a token of who a person is or what they think of themselves and how they want to be understood in a social sense, as indicated by Chen, Shang, and Li (2008). The physical attributes of the digitalization are what matter, and this is an important aspect in understanding how dematerialization affects the other personas. Meaning can exist in a nonphysical world for this persona; it just is not as likely and it is not as important. For
this persona, the real world, everyday elements of dematerialization have little meaning. The physical attributes are of the most importance. It does not mean this person does not interact with the metaphysical in listening to and engaging with music; it is just not important to him or her.

With the promoter, so much of his or her existence is based in the digital space. The meaning that is derived, though, is different from that of the expressive or the enthusiast but is similar to that of the true fan. The promoter sees extreme value in using digital elements to promote a given artist and, in the process, promote themselves. Promotion also has a social element. This becomes another component of dematerialization in the music industry:

Dematerialization is more powerful for those consumers who are less concerned about promoting themselves and more concerned with the artists and music. Promoters are similar to the digitally savvy consumers as explained by Sandulli, who like access and convenience (2007). Meaning is not lost to the expressive or the promoter, but the meaning is significantly different for these two groups. The most important meaning is of how the music or musical artifact directly influences the fashionable appearance of the listener. With the other two personas, the meaning is different. It becomes more personal and, for those in the music industry, a more important group to interact with.

Each group has merits for increasing sales and interactions with every platform currently available. Targeted advertising and marketing campaigns can be created by understanding dematerialization in these four groups. With records sales continuing to decline, there are ways to get all four consumers to continue to transition to digital instruments, while also still retaining value for the actual recorded artifacts. It simply requires an understanding of what each persona expects in interacting with music, whether in a physical or digital form, as suggested in earlier
research by Wong (2013). A digital consumer is going to have a different interaction than a physical consumer, and these interactions are reflected with the four personas.

For example, expressives are concerned about outward displays of what they own and the social implications from being so open about who they are and what they have. Bringing this group into the digital sphere may prove to be the most difficult, as this group has the closest ties to tangibility. However, by demonstrating to expressives that there is worth in the hardware and that the use of the hardware and the files can itself become a manifestation of who they are, expressives will gravitate to the newer technology. For expressives, the principle challenge is overcoming a fear of losing the outward display that makes them who they are as music fans.

For promoters and true fans, similar strategies can be used. These two are both invested in particular artists and identify strongly with what those artists represent. Instead of coercing these consumers to buy specific physical albums, in the case of true fans, they could be swayed to buy hardware through artist endorsement of certain MP3 players. Targeting hardware to specific listeners hones in on what they care about the most, and it shows that they are ever closer to identifying with the artists they care about. With promoters, the same can be said of given services. These users may already be on board with one or two established services, but start-ups could find value by promoting what they can offer with the help of artists. In both cases, artists can also curate playlists and interact with the services to show promoters and true fans that there is value for the artist in using the services. If there is value for the artist, there is value for the promoter and the true fan. In the case of the promoter, they can more closely align with the given artist and show how similar they are. For the true fan, they can increase their digital interactions and make their memories of associating with the artists more personal – in some cases, even interacting with them on social media. Of course, another option is promoting
an angle that already exists. For true fans, there is value in increasing the availability of digital downloads that can come with sales of vinyl records. Many of the true fans will never relinquish their vinyl records and will always find pleasure in buying them, yet they can still be steered to a digital realm by encompassing both the shopping experience they have and feeling greater comfort with being online. Instead of just supplying them with a download code, there should be greater interaction with the artist who they are supporting in the purchase process. One idea: Have an artist record a series of videos thanking users for purchasing the vinyl and then also downloading the album to have on whatever MP3 player they use. It continues a personal interaction while also giving the true fan all elements that he or she could want in loving a given artist. For promoters, some of the richest interaction is likely to come from artist-curated content. These people like to create playlists and share them; by interacting with a given artist doing the same thing, the experience can be enhanced for all parties and still give the promoter a sense of identity that is important in playlist creation. Further, if these playlists were available for downloading onto a burned compact disc or streamed in the car, they then have all of the hallmarks that respondents reported as important to the playlist experience. They can be played anywhere and shared, and they become as convenient and meaningful as those made by listeners.

Enthusiasts are the consumers who will remain important to target as the earliest adopters on the S curve for this group of consumers. These are the consumers who are most dedicated to the music itself, and who associate much of their everyday activities with music. This group represents not just a chance to embrace and promote growth in digital, but also in mobile. As one respondent spoke previously about running, this provides an opportunity to reach out to consumers who are interacting with music constantly. And, in the case of the runner, there are also opportunities for fashion to further develop in this space. Enthusiasts, though, could easily
help mobile continue to grow, especially as new editions come out. Enthusiasts should be embraced because, as long as the new technology works, they will use it and make it safer for other groups to be willing to try it. Enthusiasts can lead the way, as consumers, for how the other consumer personas can act. If a promoter, for example, sees that an enthusiast uses mobile regularly and can create and share playlists through mobile, then the promoter will likely follow in the enthusiast’s footsteps and also embrace mobile more readily than he or she may now.

Targeting strategies for personas.

There are ways to use existing and improving technology to communicate directly with these different personas and to take advantage of them, even as technology continues to evolve. Should music continue on a path toward streaming and intangibility, these personas will remain relevant as a way to understand what drives certain consumers to certain products and usages. As usage was such an important part of these interviews, usage is a key part of finding these personas and then communicating with them.

Many resources exist for finding these personas. For example, Spotify users are connected to social networking website Facebook, and Facebook stores a wealth of information about its users. Spotify users can be categorized into personas based on the content they interact with and their public sharing habits. A promoter can be identified by his or her public playlists and the regularity of their updates or the creation of new playlists. An enthusiast will constantly be adding new tracks and artists to his or her plays, and an enthusiast will also likely have many followers.

The more physical personas can also be found by using online tools, including music product retailers like InSound. InSound sells compact discs and records, as well as artist shirts and accessories. InSound keeps track of buyers’ emails, and a partnership with a retailer like this
could lead to more information about consumers who are purchasing physical components and products that can help in self-expression. The other aspect of physical consumers, though, is the ability to connect with retailers in person who can physically see the people who are coming in and interact with them. Personas could be found through ethnographies and observations in the field in a record store or other music-oriented shop, one that sells shirts or posters like InSound does online.

Of course, these are not the only opportunities for discovery. The growing popularity of music festivals also offers an opportunity to discover the personas in person and to interact with them in a face-to-face setting. Enthusiasts would be easy to find running around a festival venue, eager to find a variety of new bands that they think only the enthusiasts know about; meanwhile, true fans would be waiting up front at a given stage all day, hoping to be front row for their favorite artists. A promoter would be easy to track through festival hashtags on social media sites including Twitter and Instagram; an expressive would be visible in his or her band shirts and festival-appropriate attire. This in-depth, immersive experience is one place to find all of the personas; it is also a space to begin interacting with them and finding out ways to communicate directly with each one.

Building on the idea of discovery, communication with these personas is important to stage engaged with a variety of music consumers. As reflected in the literature review, the music industry has often lagged behind consumers in adopting new technology and in keeping up with where consumers’ heads are. The personas here can be utilized to communicate directly with consumers and to improve the image of the industry with those consumers. Tools like Spotify and Pandora are important for more than just discovery; they are ideal for communication as well.
For example, Spotify keeps track of what each user listens to over time. Spotify users’ recently played artists are public on their profiles, as well as their playlists and radio stations. Spotify recommends music to listeners on a daily basis based on their listening habits. Spotify is a great way to target enthusiasts, promoters, and even true fans. Enthusiasts will show the most variety in their listens and will also have the heaviest listening habits; record labels and distributors can use the enthusiasts’ listening information to promote new artists on each user’s individualized “Discover” page. Plus, Spotify already has both banner advertising on the sides of a page as well as ads that play between songs; those ads could be better targeted based on what an individual is listening to. An enthusiast will be listening to more new artists than any other persona, and those artists could be sampled through advertising on Spotify. Similar strategies could be employed for the true fan, by connecting with his or her favorite artist and finding similar artists, and for the promoter, by tapping into his or her playlists and advertising services and even rewards for playlist creation and sharing.

Online tools are not the only resources for communicating with these personas, although they are a strong way to not only communicate with the personas but to also build lasting relationships with them. However, online communications can be supplemented with in-person strategies, especially in environments where music lovers, regardless of persona, can be found. Concerts and music festivals provide a major outlet for reaching and firmly supporting relationships with personas. Messages that are seen and heard online can be reinforced and even planted with one in-person interaction at a concert or music festival. In one case, a record label may be present at a given artist’s concert to have giveaways related to newer artists on the same label; a giveaway could be a compact disc or a download code for free music. A vinyl distributor may release special edition records at a music festival that tap into the true fan’s dedication to an
artist and an expressive’s need for outward value. Fans are already paying top dollars to attend major music festivals and concert experiences, and they are already interacting with brands in both settings. Using these settings to further the music experience based on finding and targeting the personas here will strengthen the music industry over time.

**Personas shaping dematerialization theory.**

These four groups can shape a better understanding of dematerialization in today’s music industry. As mentioned before, dematerialization itself has gone through changes and shifting meanings, and has only become truly understood as the world transitions from tangible storage to digital, cloud-based storage. The earliest uses of dematerialization applied it in a way so as to understand how art retained meaning beyond being a physical piece hung in a gallery; what meanings could be derived from the art if it existed beyond the physical space? How did the art change if it was used to promote consumer goods, as advertising, and not just as art? The core of dematerialization has always wanted to know how a piece of art kept meaning as it changed form and place. With this research, dematerialization can be given a context and applied to consumers in ways that are relevant and that anticipate continuing changes in this rapidly growing, shifting field. Dematerialization cannot be limited to one consumer group or one understanding; it is much like the art it looks to encompass and explain. By understanding the varying levels of meaning in a dematerialized world, researchers can better understand the applications of this particular theory.

**Chapter VI**

**Conclusion**

The research conducted here has immediate implications for those currently working in the music industry, although it does have its limitations. The research sample was a snowball
sample, using people who knew each other and referred each other to the research. Time restrictions were also a factor, as respondents were only asked to stay and discuss the topic for one hour. Ethnographies that lasted longer would be able to give an even deeper understanding of consumer interactions in the context of these four personas. Currently, the four personas can be used to target specific kinds of listeners in specific ways. An enthusiast can be targeted as an early adopter who will use any means available to listen to music; an expressive can still be reached via more traditional routes while also encouraging platform exploration. However, the implications of this research go beyond what the music industry can do in advertising and marketing both new digital products and new music releases. This research further helps to bring about a clear understanding of dematerialization theory, a theory that has grown and shifted as technology has also changed. Instead of understanding dematerialization as a theory that can be applied to pieces of art, it can now be seen as one of the principle ways to understand consumers who are becoming more engaged with digital files than their physical counterparts for the first time. Relating to this research specifically, further research can be done to understand who exactly these personas are and how they are changing over time. Research can also be done comparing digital music listeners with other digitized media. There are also questions remaining about how self-identity comes into this research, especially if shaping an identity changes as technology changes and more and more music choices are available. Meanwhile, dematerialization can be applied to other artifacts that have become digital as time passes. Further questions remain not only for the music industry, but also for fields as diverse as publishing and healthcare. Further questions for research in relation to dematerialization theory can begin to be answered. If consumers are willing to keep their music files online and in intangible forms, what about their newspapers? How does the sense of touch change the meaning
of a piece of journalism? Are consumers only willing to keep items that they do not see as personal information stored on a computer? How long until health records are readily available through cloud storage and treated much like a music file in this research? Dematerialization is only going to grow in prominence as digital mainstreams for a variety of fields. While the focus of this research was the music industry and on consumers touching and interacting with music, dematerialization is going to expand to include much more than these files in coming years.
APPENDIX A

Interview Guide

Participant Questions: Tangibility and Immateriality

Demographic Questions:

• Age?
  o Year born?
• Gender?
• Level of education?

Snowball Questions:

• What do you do in your free time?
• What are your typical leisure activities?
  o How do you incorporate music into your day-to-day activities? [If not previously discussed in above questions.]

Music-Specific Questions:

• How do you listen to music?
• What is your preferred medium for listening to music?
  o Explain.
• How have your music listening habits changed in the past five years?
  o Do you use digital services more or less than you did five years ago?
• Do you still use compact discs or records?
• Do you listen to the radio?

• What is your perfect listening experience like?
  o Walk me through it.

• What does a compact disc, record or cassette mean to you?
  o Where does the meaning come from?

• How do you feel about owning music?

• Does streaming an album excite you?
  o Explain.

• What does it mean to touch an album/cassette?

• What digital music services do you use? Why?

**Touch:**

• How important is it to you touch something?

• How do you distinguish a sense of touch?
APPENDIX B

Institution Review Board Approval


The Kent State University Institutional Review Board has reviewed and approved your Application for Approval to Use Human Research Participants as Level I/Exempt from Annual review research. Your research project involves minimal risk to human subjects and meets the criteria for the following category of exemption under federal regulations:

- Exemption 2: Educational Tests, Surveys, Interviews, or Public Behavior Observation

This application was approved on October 21, 2013

***Submission of annual review reports is not required for Level I/Exempt projects.

If any modifications are made in research design, methodology, or procedures that increase the risks to subjects or includes activities that do not fall within the approved exemption category, those modifications must be submitted to and approved by the IRB before implementation.

Please contact an IRB discipline specific reviewer or the Office of Research Compliance to discuss the changes and whether a new application must be submitted.  http://www.kent.edu/research/researchsafetyandcompliance/irb/index.cfm

Kent State University has a Federal Wide Assurance on file with the Office for Human Research Protections (OHRP); FWA Number 00001853.
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