Download or stream? Steal or buy? Developing a typology of today's music consumer

INTRODUCTION

Streaming is about access versus ownership. Now you can have up to 30 million songs in your pocket. We want to connect fans and artists, fans and brands, fans with fellow fans.

-Fredric Vinna, Vice-President of Product, Spotify

The music industry has experienced unprecedented levels of uncertainty and financial turmoil following the Napster-led revolution of how music is consumed and the subsequent emergence of Peer-to-Peer (P2P) file-sharing networks and platforms at the turn of the century. The International Federation of the Phonographic Industry (IFPI) reports that piracy has led to a 31% decline in recorded music sales between 2004 and 2010 and a potential retail loss of 240 billion Euro from 2008 to 2015 in Europe (IFPI, 2012). Similarly, the Recording Industry Association of America (RIAA) claim that there has been a decline of 47% in sales (RIAA, 2015). However, the scale of the deterioration that can be attributed to piracy is questionable, considering it is in the industry's interest to blame illegal downloaders and also the difficulty that is evident in accounting for the number of sales lost due to each act of piracy (RIAA, 2015). The resurgence of vinyl sales (see Bartmanski and Woodward, 2013) and the increasing emphasis on physical objects (Maguadda, 2011) that facilitate digital music consumption (e.g., headphones, speakers, iPods) hint at new markets from which companies can continue to profit from music consumption. Nevertheless, piracy and digital consumption has still created a high level of industry uncertainty.

Unsurprisingly, much of the academic literature has focused on how to stop piracy. Fear and/or legal appeals (see Fisher, 2004; Chiou et al., 2005) and guilt appeals (see Levin et

al., 2007) feature regularly and have no doubt informed the recording industry's marketing communications that have sought (unsuccessfully) to scare or guilt illegal downloaders from consuming music illegally. Furthermore, shutting down prominent file-sharing websites and prosecuting consumers through graduated response systems has had a varied response at best (see Danaher et al., 2012; LeLoup and Baruch, 2012). An alternative policy of participation rather than prosecution (see Rojek, 2005) suggests that the industry needs to work with the technological transformations to improve the consumer experience and the product offering, rather than viewing them as a threat. Recent trends regarding the increased adaptation to legal music streaming platforms (e.g. Spotify) suggests that a policy of participation has the potential to be more influential in convincing consumers to move away from illegal consumption practices (see Gray, 2012; IFPI, 2014).

However, there is very little research that incorporates the changing dynamic of music consumption and considers these new legal digital alternatives within the context of online music piracy. Previous research has tended to frame contemporary music consumption as a dichotomy in terms of free as illegal/immoral and paid as legal/moral. Consequently, this calls for research that illuminates our understanding of digital music consumption during a period in which migration from illegal to legal platforms is increasingly becoming the norm. In addition, research that provides greater knowledge of the actual consumer and the variety of relating factors that influence their relationship with illegal forms of music consumption, whether they are pro-or anti-downloading, ex-downloaders, or consumers who are conflicted is required. This paper, following 35 in-depth qualitative interviews, identifies four specific segments of consumers (Steadfast Pirates, Ex-Downloaders, Mixed Tapes and the Old Schoolers) that explore a number of key factors (e.g., morals/ethics, identity investment, utilitarian values and social values) across each typology. The main contribution of this paper is the identification and discussion of the Ex-Downloaders, a segment of consumers which

has not received attention previously, and the Mixed Tapes, a large segment of consumers who have been overlooked in previous piracy research as they did not fit conveniently into the black and white (i.e., legal and illegal) narratives that have been constructed.

The paper is structured as follows. First, we will summarise what has until recently been a rather fragmented literature on music piracy. Following a description of the method used, we analyse the data in four separate sections based on the segments identified and the key emerging themes that distinguish each segment. Managerial implications and consequences for future research are discussed.

Literature Review

The only people responsible are those who are downloading music illegally, because there is no money going towards the bands anymore.

-Lily Allen, Musician

The emergence of P2P technologies and the subsequent mass piracy of music (and other media and software) has been documented in both the mainstream press and in academia where the well versed homily of the industry destroyed by piracy has featured regularly (see Gopal et al., 2006; Rob and Waldfogel, 2004; Wang et al., 2009). The industry has certainly had no difficulty in laying the blame at the feet of the 'digital pirates' with even artists, as the quote above demonstrates, denouncing consumers on what they see as an attack on their livelihood. This discourse is supported strongly by academic research, most of which begins with the assumption that file-sharing is both illegal and immoral (see Cesareo and Pastore, 2014). Gray (2012) outlines how pirates have been depicted as deviants and that studies have focused specifically on developing psychological, demographic and moral profiles of such transgressors. The number of studies (e.g., Levin et al., 2007; Robertson et al., 2012) that have focused on how to stop illegal downloading through the impact of threat (legal), fear and guilt appeals are understandable because of the potential managerial and

financial implications. However, they perhaps fail to provide a broader picture of the issue from both sides of the spectrum.

Industry Response: Swimming Against the Tide

The music industry has long battled with the question of how they should best deal with the problem of illegal downloading for several years now. The literature is rather fragmented on this because of the complexity of the issue and the fast rate at which the technology evolves. Fisher (2004) argued that highlighting the property aspects of music and stressing the legality of file-sharing could possibly lessen the appeal of downloading illegally. Chiou et al. (2005), based on a survey of Taiwanese music consumers, maintain that perceived prosecution risk affects attitudes towards music piracy. However, previous research (i.e., Balestrino, 2008; LaRose et al., 2005) argues that legal punishments are a negative predictor of downloading intentions. Robertson et al. (2012) go as far as claiming that illegal downloaders are more likely to engage in more serious illegal acts than those that do not download. Several researchers (e.g., Levin et al., 2007), recommend that the industry publicise the potential legal consequences of illegal downloading more vehemently to stop consumers. Wang and McClung (2011) warn of a potential boomerang effect in prosecuting or even threatening to prosecute consumers, developing a further level of resistance and justification for consumers to continue to pirate music.

However, the threat of legal action in advertising campaigns has been followed up with the enforcement of a graduated response system whereby consumers are given a number of warnings that increase in punishment (i.e., the disconnection of internet service providers for a period) if the consumer continues to share and download illegal sources. This legal strategy is something that the industry has pursued to varying degrees in different countries, depending on the particular laws of the individual country and the relationship the industry has with the internet service providers. For example, Hill (2007) has reported a level of

success in governments and internet service providers working with the industry to thwart piracy in the USA. Additionally, Danaher et al. (2012) report that France's legal enforcement of the graduated response system has led to a reduction in illegal digital consumption and a consequent increase in legal digital consumption. However, it has been reported that the decrease in piracy can be attributed to the increasing number of iPhones and iPads that were purchased by French consumers at this time (Leloup and Baruch, 2012).

Another approach that has been considered is the use of guilt appeals. For example, Cockrill and Goode (2012) recommend communicating the attribution of harm that is caused by illegal downloading. In their study of DVD piracy they identify perceived harm as the most important factor for predicting the intentions of pirates and suggest that the main reason why consumers continue to pirate is that they fail to see the wider consequences it has on different stakeholders in the industry. For the music industry this would involve placing emphasis on the decline of the industry, the damage that piracy is doing to small artists and the jobs that are lost as a consequence. However, previous research has argued that this has no impact in reducing the level of piracy (Levin et al., 2007; Lysonski and Durvasula, 2008). Wang and McClung (2011) suggest that the industry should do more to make the attribution of harm a key criteria in consumer's decision-making process through communicating the inconsistencies between an individual's values and attitudes (e.g., you wouldn't steal a physical copy of the compact disc[CD]). However, as Cockrill and Goode (2012) maintain, the problem with such an approach is that it assumes that all consumers are the same. It overlooks the fact that such consumers have different levels of usage and attitudes towards piracy. Adopting a 'blanket' approach to marketing campaigns that highlight attribution of harm and question a consumer's ethics could potentially have the undesired effect of annoying consumer segments who engage in very little piracy or are "already convinced that piracy is unethical and causes harm" (p.7).

The emphasis that is placed on the guilt of consumers relates to a wider issue regarding the assumption in much of the literature (e.g., Mitchell and Chan, 2002; Easley, 2005) that consumers who download illegally are morally inferior to those that legally consume music. Perhaps more illuminating questions, that could be potentially more beneficial in the long run, concern whether pirates' morals are wrong in the first place and what are their justifications for engaging in such practices.

Consumer Justifications for Downloading

The most obvious reasons why someone would download illegally are the utilitarian benefits, the low price (free in the most part), the convenience and the storage capabilities that can be gained (see Forester and Morrison, 1994; Freestone and Mitchell, 2004; Cockrill and Goode, 2010; Kinnally et al., 2008). Freestone and Mitchell (2004) suggest that consumers need to be educated as to why prices are set at the levels they are as consumers potentially see piracy as a way in which to drive down the high prices they have had to endure before the emergence of illegal alternatives. Additionally, Ceinite et al. (2009) suggest that consumers want to sample the music before they try it. However, the low utilitarian qualities of the digital product (i.e. quality of sound) are also cited as a key factor in contemporary consumers deciding not to purchase music in this form (Weijters et al., 2014).

There are also more complex justifications that receive little attention in the literature. For example, previous research has questioned the common presumption that piracy is unethical in the first place (Easley, 2005; Mitchell and Chan, 2002). Ang et al. (2001) describe how consumers believe that musicians are paid too much and still profit substantially regardless of piracy. This refers to a mistrust of the music industry and a sense of resistance that some consumers feel they are displaying by downloading music illegally (see Garcia-Bardidia et al., 2011). This potentially provides illegal downloading with a sense of moral justification.

Easley (2005), in consideration of the ethical issue associated with downloading music, questions the morals of an industry that prosecutes its own customers in an attempt to stop a practice "that is likely to bring about a social good" (p.166). Rojek (2005), in defence of the pirates, argues that illegal file-sharing could be considered as a positive movement in that it develops social inclusion, greater choice and access to music for more people. He argues that the commercial interests of the music industry have curtailed the individual's rights regarding leisure and cultural engagement, and that the advent of file-sharing has been an important factor in fostering an anti-consumerist discourse in consumer culture. However, Garcia-Bardidia et al. (2011) posit that the resistance associated with illegal downloading is questionable considering the now mainstream practice of pirate consumption and the high number of commercial pop artists and blockbuster movies that are downloaded illegally. In sum, Garcia-Bardidia et al. (2011, p. 1790) note that "the moral labelling from the marketplace and the diffusion of the practice to mainstream consumers implies alternative stances to activism."

Giesler (2008) prefers to avoid moral labelling and focuses more attention on the relationship in the marketplace between consumers and producers, providing a more nuanced understanding of illegal music consumption. Giesler argues that cultural consumer markets evolve through stages that are characterised by instability, conflict and drama relating in particular to both artistic and business ideals. Giesler's research focuses on how a balance can be attained between those who think that music should be free for all (the social utilitarians) and those who argue strongly that the economic interest of the producers of music must come first (possessive individualists). The compromise in this case is a viable digital music alternative. This supports research (see Sinha and Mandel, 2009; Taylor et al., 2009) that implies individuals are willing to consume digital music legally if the product is perceived as superior to illegal alternatives. Giesler (2008) suggests that iTunes is a potential

compromise. While iTunes was established in 2001 and experienced considerable commercial success, the problem of music piracy has permeated in that time frame which leads to questions concerning Giesler's arguments here as well as the apparent 'superiority' of iTunes.

However, due to the recent growth in streaming services (i.e., 51% increase in 2013), cautious optimism exists on the industry's part regarding the potential impact streaming has had on piracy. The IFPI (2014) reports that 89% of Swedish Spotify subscribers illegally downloaded less often since they began to use the legal streaming platform. Despite this potential shift in music consumption behaviour, there has been little academic research on streaming, a consequence no doubt of its relatively recent popularity with music consumers. Cesareo and Pastore (2014, p. 515) argue that favourable attitudes towards online music piracy "negatively influences consumers' willingness to try subscription-based music services." This contradicts the initial research conducted by the IFPI as the Weijters et al. (2014) article, which following the examination of consumers in both streaming and illegal downloading contexts, argues that consumers "clearly and consistently prefer legal and ethical options if available" (2014, p. 538). Additionally, focus is placed by Weijters et al. (2014) on age in determining preference for illegal or legal platforms, indicating that younger consumers are more concerned with value for money. Based on the significant changes in how music is currently consumed, additional research is needed to understand the consumer's underlying assumptions and experiences at this apparent crossroads in legal/illegal music consumption, to explore a number of other factors that are also influential.

Methodology

Previous research on music piracy has predominantly used statistical surveys in which to demonstrate the role of key modifiers (e.g. demographics, self-control, intentions) in predicting behaviour (see Chiang and Assane, 2008; Higgins, 2007; Coyle et al., 2009) or

preventing illegal downloading (e.g. Sinha and Mandel, 2005). However, considering the advent of new digital technologies and the consequent changes in consumer behaviour our research required a more exploratory methodology (Strauss and Corbin, 1990) that could represent the complexity of factors and values that influence contemporary music consumption. Additionally, previous research suggests that when exploring ethical and moral concerns with consumers, the use of qualitative methods provides a sense of realism for the participants (Arnold et al., 1996). Accordingly, depth personal interviews were conducted in order to explore the current landscape of music consumption amidst considerable change in the marketplace.

Interview Sample

Participants were initially selected on the basis that they had an active interest in music. Here the requirement was they had recently consumed music legally or illegally, digitally or physically or in some other medium (e.g. concert, festival, television). Following a purposive sampling approach, participants that were known to have a significant interest in music were targeted specifically by the researchers. These included interviewees who produced their own music, attended live shows regularly and collectors of music. A further strategy of snowball sampling was employed as the study progressed with our initial participants providing introductions to friends and colleagues who shared a similar level of passion and interest in music consumption. The initial round of participants were instructed not to reveal the purpose of the study to the next group of participants. The participants were recruited from cities across the United Kingdom and Ireland (e.g., London, Edinburgh, Bristol, Stirling, Glasgow, and Dublin). The sample ranged in age from 18 to 45 years old and were employed across a variety of industries including healthcare, radio, education, the services sector, finance, healthcare and marketing. Although a small number of students were also interviewed this represented a much smaller proportion (and hence greater variety) of

respondents in comparison to previous research on this topic which has tended to focus disproportionately on students (Cockrill and Goode, 2012; Weijters et al., 2014). Interviewee names were changed and assured of their anonymity which carried extra weight for this research considering the illegal nature of the consumption practices that were discussed at times. Each participant's age, occupation and the segment their consumer experience related to most are outlined in Table 1.

PLACE TABLE 1 HERE

Data Collection

Data was collected via 35 in-depth qualitative interviews (20 male and 15 female) from a project concerning contemporary music consumption. The interviews averaged 57 minutes in length and were recorded and transcribed verbatim. Previous research suggests that participants may provide socially desirable responses when discussing topics related to ethical/unethical behaviour (i.e., Oberseder et al., 2010). As a result, we offered the participants the opportunity to be interviewed at their place of work or their homes in order to develop rapport. The participants were also reminded that the interviews were anonymous and confidential and we sought their honest opinions on the consumption of music (i.e., Green and Peloza, 2014). Additionally, our participants provided examples of actual consumer behaviour decisions versus stating behavioural intentions. A number of participants openly discussed their illegally downloading behaviours evidencing that a sense of trust and rapport was developed.

The initial set of questions allowed for a general discussion of music including questions related to first purchase of vinyl/tape/CD/download, favourite bands, first live music experience and opinions on the industry. Next, participants were asked to discuss the role of music consumption in their everyday life, followed by the exploration of the role of social and ethical responsibility in the consumption of music. The use of a semi-structured

interview allowed for follow-up questions to further explore emerging themes. In addition, the authors discussed the effectiveness of the interview questions throughout the data collection process in order to update and refine the interview guide. Further, our participants were provided an opportunity to discuss the interview guide at the end of the interview. As a result, the interview guide was updated based on questions the participants felt were difficult or if additional questions were suggested to be added (Mohr et al., 2001).The transcripts were reviewed separately by both authors, following an iterative process (Spiggle, 1994). In addition, any field notes taken from the interview were shared and reviewed between the authors before coding took place.

Data Analysis

The data was coded into a number of typologies that emerged from the analysis (Steadfast Pirates, Ex-Downloaders, Mixed Tapes and the Old Schoolers) based on their current approach to consuming music and the emerging sub-themes which are discussed in the findings section which follows. Considering the state of flux the music industry currently finds itself in and the high level of uncertainty that illegal downloading and new technologies of music consumption have created, analysis of consumers has to incorporate a variety of different factors that influence consumption. As a consequence of the prominent role that piracy has played in shifting this landscape, we use it as a lens in which to make sense of contemporary music consumption. The typologies are based on a continuum of preference for illegal consumption of music. Accordingly, we have divided the participants into typologies (see Table 2) based on how they currently consume music and the role that piracy plays in their consumption.

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We describe the characteristics of each segment along with identifying key emerging themes including their moral and ethical views, utilitarian values, and identity investment as

it relates to their current music consumption decisions. Each of these key themes are explored across all four of our segments. The overlap of key themes in each segment is also taken into consideration.

The Steadfast Pirates

The Steadfast Pirates, as the name indicates, illegally download music prolifically, and have continued to do so in the face of attempts by the industry to change their behaviour through guilt and fear appeals. Furthermore, despite the increasing availability of alternative legal platforms that support digital music consumption (e.g., iTunes and streaming services such as Pandora and Spotify), the Steadfast Pirates continue to download illegally. This segment is defined by the high volume of content that they pirate, by their technological literacy and by the lack of guilt that they express for their illegal actions.

> *I just checked my laptop today and I have a hundred megabytes of music so I think that is around 17,000 songs and I don't think I have paid for one of them. (Sean, 25).*

Many of the participants reported having a high volume of music content on electronic devices that were sourced through illegal means. Some of them expressed bemusement at the industry's attempt to block websites and penalise consumers for downloading illegally as the technology involved in file-sharing is extremely difficult to stop due to its constant evolution and the technological literacy of the pirates who develop as well as use it (see Condry, 2004).

> *… as long as there is encryption in the internet and as long as someone can send data there will always be file-sharing and it is a stupid effort trying to stop it in my opinion (Paddy, 27).*

This segment is clearly the most harmful to the industry because of the volume of content they pirate and their ability to circumvent any sanctions (e.g., website blocking) as they consistently find new ways to source music for free (see Ponte, 2008). What is

potentially even more troublesome is that this group expresses little guilt regarding their actions which raises issues about moral justifications, which are discussed next.

The Moral View of Pirates

When discussing their illegal downloading activities, this segment of consumers realised they were stealing music but still pirated free music without feelings of remorse, for example:

> *I definitely knew it was illegal. I think when I first started using Napster I wasn't completely sure of the whole Napster thing as I was only a kid. Then obviously when I found out about [*it*] I still didn't really care about it [*being illegal]. (Graham, 27).*

Previous research on music piracy assumes that the actions of the pirates are morally wrong (Easley, 2005; Mitchell and Chan, 2002). For example, several studies (i.e, Cesareo and Pastore, 2014; Robertson et al., 2012) argue that consumers who abstain from illegal downloading are morally superior to their pirate counterparts. Consequently, the voices of downloaders who feel that they have moral justification in pirating music are conspicuous by their absence. There were a number of participants who voiced frustration with such labels as 'delinquents' or 'immoral'. For some, they believe that what they are doing is not even illegal, let alone immoral.

> *I would say [*piracy*] is more just sharing. I don't see why it should be illegal. I think a lot of bands now, especially a lot of the music I listen to which is not as corporate, give the music free as charge, provide a few downloads because they just want people to hear their music. They are not as fussed about making money. (Sarah, 22).*

Furthermore, despite research that argues that fear appeals have the potential to defer would-be-downloaders (see Chiou et al., 2005; Levin et al., 2007), the evidence suggests that for a number of members of this segment, there is little or no fear of prosecution for

downloading music illegally. In fact, many of the participants laughed at the attempts of the industry to inspire fear.

> *They are not doing it right. I am not saying I am an expert or whatever ... they are making it laughable, like it is wrong, it is wrong and they show some lad stealing all these bogey CDs on some market stall. They make it look like you are buying crack cocaine but you are not... (Graham, 27).*

Many of the participants, more specifically the older members of this segment, refer to other forms of piracy such as tape trading and pirate radio that have never received the same levels of attention that illegal digital downloading has. The participants refer to the influential role that such outlets had in introducing them to music they would never have found through mainstream mediums (see Kahn-Harris, 2007). Participants in this segment believe that the advent of file-sharing technologies has had a similarly positive effect in shaping their music taste and broadening their horizons at an obviously much wider scale than previous illegal means. Condry (2004) suggests that we should embrace the culture of piracy as it can help develop new forms of music cultures and enhance existing ones.

> *I think its [*illegal downloading*] great. I hope it never goes away…it's only because of this that people like me have gotten into heavy metal. If it wasn't for free music I don't think I ever would have went out and bought [*CDs*]. (Ali, Male, 37).*

Several of the participants support this viewpoint suggesting that music should be free or at the very least affordable. Giesler (2008) would describe such participants as social utilitarians. What constitutes 'affordable' is obviously relative to the individual. What is clear is that the majority of participants believe that music is overpriced; particularly the younger participants who have less money and typically consume more music. Bian and Veloutsou (2007) have previously reported that younger consumers are more likely to pirate. Furthermore, the participants maintain that the recording industry has failed to explain why

music is priced at the amount it is (see Forester and Morrison, 1994; Freestone and Mitchell, 2004) and that they have no other choice but to download illegally in order to satisfy what they feel as their 'right' to access music.

> *CD's are overpriced, they truly are and the record company's argument is that people are downloading our music and that is why our prices are high but they had to start off high and if they brought them down then people wouldn't download. (Rory, Male, 19).*

Whilst the Mixed Tapes segment in our study expresses similar justification for their illegal downloading in the form of resistance to the industry, the Steadfast Pirates are more consistent with their reasoning, not distinguishing between mainstream artists and those that are perceived as smaller in commercial terms. Additionally, the reference to utilitarian qualities such as price and convenience in the quotes displayed above is something that the Ex-Downloaders segment has in common with the Steadfast Pirates. The difference, as will be explained in the next section, is that the Ex-Downloaders have found (in their opinion) a format that is more convenient than illegal downloading and only relatively more expensive. The question is whether the Steadfast Pirates believe that illegal means still offer greater utilitarian values or if it is the moral justifications regarding their resistance to the industry that are stopping them from exploring legal alternatives.

Ex-Downloaders/Streamers

The identification of Ex-Downloaders as a segment represents a new focus in the piracy literature and a cautious acknowledgment that the tide may be turning regarding the fight against illegal downloading (IFPI, 2014). This particularly relates to the increasing prominence of legal streaming platforms which all but one of the Ex-Downloaders segment referred to as the major reason why they have ceased using illegal platforms.

The Utilitarian Alternative: A Reason for Migration

Several of our interviewees in this segment specifically referred to the streaming service, Spotify, as to why they have discontinued illegally downloading music. Spotify offers two options. The first is the free service based on the freemium model where consumers have to listen to adverts between songs. The second premium option allows consumers to listen to whatever music they like, from advertisements for the price of £9.99 a month or £4.99 if you are a student (Spotify.com). Thus far, Spotify has experienced significant success with over 60 million subscribers with 25% of all users currently paying for the premium service (Luckerson, 2015).

> *Now I use Spotify, I use premium, I don't download anymore. I used to do it all the time but with Spotify Premium I can get my phone out for 4.99 and listen to what I want (Eric, 19)*

The other participants in this segment stopped illegally downloading music after they discovered Spotify for a variety of reasons that extend beyond functional value (Sheth et al., 1991). It is not just the availability of all their favourite musicians at a relatively cheap or free price that attracts the participants but also the built-in features which allows consumers to find out about and access music they may never have heard about before. This refers to the recommend function of the application and the emphasis on creating a social network of users. While previous research examining music consumption has discussed the role of group membership and social influence in live music scenes (e.g., Thornton, 1995) and in activities such as vinyl collector clubs (Mitchell and Imrie, 2011), to date the potential value of online referrals via social networks has not been explored. Our participants identified the importance of using Spotify to follow what their friends are listening to as well as their favourite artists, for example:

I will just go to related artists, so say I am listening to Taylor Swift, it will send me to Miley Cyrus and if I am listening to Metallica it will send me to Megadeth… and Spotify it's literally like Facebook where you have friends that you follow and I will look at other people's playlists and it is as you log on to Spotify, this person listened to this, this person listened to that, you might like stuff like that, these are playing in Ireland soon, check them out, it is pretty much a one stop shop for any tunes. (Sean, 25).

The evidence suggests that for these consumers illegal downloading was always about the utilitarian values (e.g., convenience, price and quality) rather than any moral justifications. Streaming, and in some cases applications such as iTunes, represent superior alternatives (see Rojek, 2005) and hence they have ceased their illegal consumption of music.

However, it is evident that the emergence of streaming services have not solved the problems of the artists with controversy in particular concerning the apparently meagre royalties that artists receive (Szental, 2012). This raises moral issues about the distribution and consumption of music once again. Consistent with their lack of guilt for their previous downloading habits, the Ex-Downloaders express little sympathy for the artists and see their monthly payments as alleviating any guilt they would have for them. The opinions of the participants on this subject reflect the inconsistency and uncertainty that currently surrounds issues regarding artist royalties from this platform.

*There is a lot of up in the air stuff about [*the payment of artist royalties*] but yeah I just really see it as, anyone I wanted to listen to has been on Spotify and the fact that I am paying for it with my 'tenner' a month takes away the little guilt I might have had. (Paddy, 27).*

Although the quality of new streaming services has attracted the Ex-Downloader segment, there remain two key issues with this format for the next two segments that will be

discussed (Mixed Tapes and Old Schoolers). The first concerns uncertainty and aspects of guilt regarding the compensation that artists receive from streaming platforms. The second is the intangibility of the platform, a feature of all digital music platforms. The implications this has in terms of identity investment, artist-consumer relationships, and technological adaptation are discussed in the following sections.

Mixed Tapes

The dichotomous approach to previous research that examined piracy issues as either illegal/legal and/or moral/immoral has resulted in a group of participants being largely ignored. However, the data suggests that for a large number of participants the issue of illegal downloading and contemporary music consumption is a lot less black and white than what has been depicted. The data indicates that whilst members of this group have previously downloaded illegally or continue to do so, they still buy physical music products, express a lot more guilt than the previous two segments, and their justifications for their actions are more complex. They are seemingly more conflicted regarding their actions, for example:

*Yeah, I am ashamed to admit that I have pirated some stuff and I felt guilty [*laughs*].*
So I feel, like good when I actually purchase it properly, like, legitimately. (Lisa, 33).

These participants do mention the benefits of free and easily accessible music as reasons why they download music illegally but they also offer alternative justifications that were not mentioned by either of the other segments that engaged in piracy. For example, such justifications include testing the quality of the music before purchasing it.

Lots of people in the scene are like 'oh you are stealing'. It's a load of crap. I like the idea of checking something out before I decide to buy it or not because there have been a few occasions where you know a few music fans will be raving about an album saying 'oh it so awesome'. I would go out and buy it and it actually wouldn't satisfy my personal taste if you know what I mean. (Gerry, Male, 23).

Some participants claimed that they only download illegally from artists that are considered commercially successful or 'mainstream'.

> *I am actually kind of split on [the piracy issue]. In one way I download myself but it is kind of if I was going to listen to a big band… if I download one CD it means they are not going to make another five dollars. It makes no difference to them but if it is a band that is kind of starting out and they need to be selling albums to make it to the next step I wouldn't download their stuff. (Steve, 19).*

Similarly to the other two segments that download music illegally, the Mixed Tapes refer to a greedy and unfair music industry to justify their downloading. However, the Mixed Tapes, unlike the other segments, are conflicted by the potential impact their illegal downloading has on smaller record labels and local musicians. Surprisingly, many of the participants in this segment view their legal consumption of smaller bands/artists as socially responsible. This supports research from Green et al. (2014) who found that some consumers saw their support of small and local businesses as an example of socially responsible consumption behaviour. Although their guilt is alleviated by reference to their reluctance to illegally download music from smaller artists, statistics still indicate that they are suffering just as much as more mainstream acts (see IFPI, 2011) and the claims of some of the participants about their consumption of small versus big musicians are questionable considering the difficulties that come with distinguishing between these two constructs.

Identity Investment

It is not just the guilt of illegal downloading that is problematic for the Mixed Tapes, it is also the sense of identity that is lost from consuming music in this way. The advent of digital consumption has created conflicting feelings for these consumers. For example, some of the participants believe that they are not supporting their favourite bands if they source their music from the internet.

*But there are certain bands no matter what they brought out I would buy them because I like the bands and I would want to hear them… I like the band Arcade Fire so when their album was coming out there wasn't even a question of whether I was going to download it. It wouldn't even occur to me because I love that band and I would want to actually have that album and even when you download there is a kind of line if the band means more to you and if you like the band and if you really like [*the album*] you are going to invest more in it. (Ciara, 18).*

Many of the Mixed Tapes feel the same way about consuming their favourite artists' music even if it is through legal digital means. There is a sense of tangibility that is crucial to the relationships they have developed with their favourite musicians. They have little physical evidence of their fandom to demonstrate to their peers. This supports recent research concerning the re-emergence of vinyl as a popular product of consumption (see Hayes, 2006; Bartmanski and Woodward, 2013). Consumers perceive physical products to be of higher quality and to communicate a sense of music credibility that comes with consuming non-digital music.

I'll go out and buy a CD still if I really like something. A CD is kind of almost like a bit of a collection thing for me, I don't have to have a physical copy but if I really, really like something I kind of like to have it on my shelf as sort of part of a collection. I like the whole thing as a piece of work. So it is nice to have the CD with the art work and the packaging and everything else and just be able to put it on a CD player and listen to it in its entirety as a thing to do. Rather than just sort of shuffling tracks in and out from other things. (Erica, 34)

Consequently, the participants refer to live gigs and merchandise that they purchase in order to make up for their transgressions. There is an element of subcultural capital (see Thornton, 1995) that is at stake here also as the fans need totems related to their music

consumption to manage and communicate their music or cultural identity (see Hall, 1996). This relates to the consumption of vinyl and CDs but also again refers to this segment's support of smaller or local artists that are associated with much higher levels of music subcultural credibility. For example, in the following quote the participant has just described his hatred for mainstream record labels and the ways in which he tries to bypass them by giving money directly to the artist as a recompense for illegal downloading.

> *Literally the first gig I went to see [*Indie/metal band called 'Horse the Band'*]…I was talking to the keyboardist afterwards and I have a photo with him, he is a really sound lad. I just pulled out my wallet and go here is sixty euros. This is for every album and E.P you have. (Steve, 19)*

Again, there is inconsistency in his logic as he is mostly bypassing independent record labels, not established mainstream ones with his payment[1]. Garcia-Bardidia et al. (2011) questions the resistance that is associated with illegal downloading, identifying the high number of mainstream artists and blockbuster movies that are most commonly downloaded. These justifications are indicative of the complex ways in which the Mixed Tapes rationalise their illegal behaviour in the context of the identity investment they have in music consumption. Although, streaming services offer them the chance to alleviate their guilt in consumption, the intangibility of the product offering is not sufficient for them to communicate their cultural identity.

The Old Schoolers

The final segment of consumers that will be discussed are the music consumers who do not illegally download. This segment mostly consumes its music via physical forms and is the oldest in age of all the segments identified. This possibly explains the difficulty the consumers have with all elements of digital consumption, let alone piracy.

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[1] Horse the Band have released music from a variety of labels that have been described as 'independent'.

I have never downloaded anything and to be honest I couldn't even tell you how to do it. (Brian, 45).

However, even the younger participants confess that their lack of technological literacy has stopped them from sourcing music online.

I'm completely technophobic and I don't really know how to work the iTunes account and I don't buy digital music. (Carol, 34)

Cockrill and Goode (2012) argue that consumers who don't engage frequently in piracy activities are most likely to be deterred by industry strategies (e.g. website blocking, encryption) that challenge their technological capabilities. The lack of technical skills for this segment of consumers was not the only significant concern that stopped them from illegally downloading. Specifically, these consumers also expressed fear of getting caught illegally downloading and suffering the moral consequences.

Fear and Guilt Appeals

As previously discussed, a common approach of the music industry when combatting piracy was the use of fear and guilt advertising appeals, coupled with legal action being taken against both websites that offered P2P platforms and individual illegal downloaders. A small number of participants stated that they feared the repercussions of illegally downloading music due to their uncertainty at how the process actually works.

'I don't do any illegal downloading because I'm just too scared to get caught to be honest.' (Fiona, 23)

This represents a minor victory for the recording industry who have engaged in a policy of policing and fear appeals. In addition, the Old Schoolers also refer to the morality of stealing music. Robertson et al. (2012) have suggested that the higher the moral obligation of an individual, the less likely they are to engage in illegal behaviour. It is evident that the Old Schoolers are just as clear as the Steadfast Pirates in their morals regarding illegal

consumption. It is just that both of them come from completely different perspectives. For example:

> *I hear people saying that well I will download it and if I like it I will go out and buy it and if I don't like it I will delete it. You might as well just listen to it on MySpace and decide that ... if someone is spending money recording it they should get something back. It is the same as someone is making bread, you don't go into the shop and steal it because you know you want bread. You have to pay for it. That argument is made around music, [*but*] people have to record it, buy their instruments, studio time; it costs money to press it and record it and package it. (Brian, 45).*

This participant's view is in line with current efforts in the music industry from labels and organisations who seek to raise awareness of the required investment associated with the development of musicians. Recently, the IFPI (2014) noted that the total investment in a single artist ranges from US $750,000 to $1,400,000 based on the costs associated with advance payments, recording costs, tour support and marketing. Moreover, the evidence from these participants supports the argument from Chiou et al. (2005) and Cockrill and Goode (2012) that demonstrating harm attribution can transform consumer behaviour, but again for the Steadfast Pirate and Ex-Downloader segments this was not an issue. Additionally, the Old Schoolers demonstrated consistency in their belief that artists have to be rewarded for their work when considering the option of streaming music or sourcing it from other legal digital means.

> *So you can pay for [*Pandora streaming service]*, or the free service just has ads in between them. So its advertising that obviously pays for it. But then I think to myself I feel a bit dirty doing that because I feel that I haven't paid for the music I'm listening to and yet I admire the musicians and stuff ... I think the whole iTunes and market and digital downloads is a really bad thing. It is a great thing in terms of access to music*

but I think it's a really bad thing in terms of the actual musicians themselves being

able to get paid for the art that they do. (Carol, 34).

This evidence suggests that legal alternatives to music piracy not only have a problem in convincing the Old Schoolers of the utilitarian qualities and ease of use from a technological perspective but they also potentially have a problem in convincing them of the morality of using a platform that has been accused of mistreating artists.

Discussion and Implications

The current research explores contemporary music consumption practices during a time of considerable transformation in available music formats that has resulted in significant turbulence for the industry. In this section we offer a summation of the theoretical and managerial implications that this research provides. In concluding, recommendations for future research are considered.

Whilst considerable research has examined the consumer view of piracy, the introduction of successful music streaming services in the past few years provides an important opportunity to re-examine the piracy debate with today's consumers. Notably, we identify two new segments of consumers that has emerged in the contemporary music market (Ex-Downloaders and Mixed Tapes). These groups have been ignored in previous research which has tended to frame music piracy in dichotomous terms, not understanding that justifications for such illegal behaviour are perhaps more complex and inconsistent than expected. For example, the Mixed Tapes, a segment that illegally downloads some of their music, experience high levels of conflict and rationalises their behaviour in the context of their identity investment in certain artists, support for small artists but also their disdain for the 'mainstream' industry. Previous research on illegal downloading has tended to explore the importance of ethics to music consumers only through a single-item scale (i.e., artist compensation).

While the other two segments of consumers identified (i.e., Steadfast Pirates and Old Schoolers) have been examined in previous music piracy research, we identify key themes that drive their decision-making. Whereas previous research has predominantly focused on demographics as a key predictor variable of behavioural intentions we found that other factors such as technological literacy, identity investment and attitudes to the music industry provide more depth to understanding the decisions that the respective segments make regarding the illegal consumption of music but also in terms of how they make decisions concerning legal forms of music consumption.

The identification of such segments has also led to a number of significant managerial implications and raises the possibility of specifically tailored strategies. First, the emergence of the Ex-Downloaders provides strong evidence that a policy of participation rather than criminalisation or stigmatisation represents a more likely path from which music piracy can be reduced and new forms of revenue can be capitalised upon. Legal threats were found to only have any significant impact on the Old Schooler segment, although guilt and moral obligation were found to be the more influential factors in influencing the attitudes of this group regarding piracy. However, fear and guilt appeals had no impact on the Steadfast Pirates and the Ex-Downloaders and only a marginal influence on the Mixed Tapes in terms of their consumption of smaller artists and independent labels. Consequently, the increasing consumption of legal alternatives seems more encouraging as a strategy and continued strategies of guilt and fear appeals should be reconsidered.

The popularity of streaming services with the Ex-Downloaders is a consequence of utilitarian qualities such as the perceived low price, the high level of content and to a lesser extent the social networking and recommendation features. Nonetheless, there remains issues that need to be resolved to encourage further adaptation for the other three segments. The Steadfast Pirates are still not convinced of the superiority of legal digital platforms over

illegal forms of digital consumption and the Mixed Tapes and Old Schoolers have reservations over its potential superiority to physical forms of music. The Mixed Tapes potentially represent the most likely segment that could be convinced to migrate to legal digital platforms because of the level of guilt that they attribute to their acts of piracy. Although this segment place greater emphasis on the social aspects of music consumption and the idea that possessing physical copies of music communicates their credibility in music tastes to fellow music fans, streaming services could do more to highlight the social networking and profile display features in their targeting of this segment. In simple terms, they should emphasise how consumption of such platforms allows the Mixed Tapes to communicate their knowledge of music and cultural identity.

Although the Steadfast Pirates could potentially be convinced of the utilitarian qualities of the music, there still remains issues regarding their mistrust of the industry. Perhaps greater engagement on the part of musicians and labels with this segment of consumers could help alleviate some levels of mistrust and hence reduce piracy but the success of such a strategy is difficult to predict. It is still unclear whether the Steadfast Pirates place their utilitarian values of having free access to music over and above their moral reasoning for not accessing music in a legal fashion? This group remains the most harmful one to the industry as they very rarely consume recorded music legally. Accordingly, future research which explores this dynamic is crucial. The Old Schoolers still have to be convinced that digital music represents an equal if not better product offering than physical forms of music if they are to become a profitable segment in the digital market. If there is a desire to move the Old Schoolers from purchasing physical copies of music, they could attempt to educate this segment on the value of digital versions of their favourite artists' work and the ease and safety of consuming music in legal digital spaces.

However, there is also a further issue that The Old Schoolers (as well as the Mixed Tapes) has regarding the moral integrity of the royalty scheme. This is a wider problem that Spotify, for example, has had to manage recently with artists (Szental, 2012). The recent decision by high-profile artists such as Radiohead and Taylor Swift to remove their music from Spotify has resulted in greater discussion regarding the payment structure of streaming services for artists. For example, Pharrell Williams' song "Happy" was streamed 43 million times on the streaming service Pandora, providing royalties of just $25,000 (Renzetti, 2014). The ethical implications of artists receiving very little payment from streaming services will be a significant issue that may slow the growth of streaming services in some segments who place ethical issues above convenience and costs of music consumption. Consequently, it is vital that this issue is addressed immediately. The influx of legal streaming services has created a high level of competition. Adapting an ethically-minded positioning strategy could help differentiate a product from its competitors and could be attractive to participants who have concerns over the royalties paid to artists.

The issue of artist royalties in addition to the identification of segments and managerial implications discussed of course raises potential avenues for future research. We propose that future research with a larger sample, such as wide-scale surveys of music consumers, would be of benefit for both researchers and practitioners in the music industry. For example, we could gain more insight into the segments we have identified in this study while also determining the proportions of the segments across broader samples. In addition, the quantitative studies may in fact identify additional segments or evidence relationships between key variables such as demographics and the key emerging themes (ethical/moral, utilitarian value, identity management) presented here. The current study was also limited in geographic scope with a focus on consumers in the UK and Ireland. Future research should

expand the sample to include consumers from other countries, particularly the large North American market.

Finally, it is clear that future research needs to go beyond monitoring the consumer response to the changing landscape of music consumption. Research that examines a variety of members of the music industry including artists, label owners, journalists, radio broadcasters and studio owners among others will provide a more holistic view of the industry.

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Table 1. Sample Demographics

Participant	Name	Age	Gender	Occupation	Industry	Segment
1	Mary	45	Female	School teacher	Education	Old Schooler
2	Fiona	23	Female	Student and p/t sales	Business Education	Old Schooler
3	Heather	42	Female	Literacy advisor	Education	Mixed Tape
4	Dean	25	Male	PhD student	Business	Ex-Downloader
5	Dennis	44	Male	Health and Safety	Government	Old Schooler
6	Carol	34	Female	University Lecturer	Education	Old Schooler
7	Elaine	43	Female	Administrator	Government	Old Schooler
8	Gordon	22	Male	Unemployed	N/A	Mixed Tape
9	Jane	24	Female	Brand Management	Marketing	Mixed Tape
10	Lisa	33	Female	Graphic Designer	Creative Media	Mixed Tape
11	Mary	26	Female	Administrator	Entertainment/Arts	Mixed Tape
12	Erica	34	Female	Operations Manager	Entertainment/Arts	Mixed Tape
13	Ian	37	Male	Ambulance Dispatcher	Emergency Services	Old Schooler
14	Craig	31	Male	Accountant	Professional Services	Mixed Tape
15	David	26	Male	Computer Scientist	Information Technology	Steadfast Pirate
16	Graham	27	Male	Pension Administrator	Banking	Steadfast Pirate
17	Sean	25	Male	Fitness Instructor	Health/Wellness	Steadfast Pirate
18	Dan	29	Male	Strategy Consultant	Aviation	Ex-Downloader
19	Sarah	22	Female	Student	Education	Steadfast Pirate
20	Paddy	27	Male	Retail shop employee	Retail	Ex-Downloader

Participant	Name	Age	Gender	Occupation	Industry	Segment
21	Isabel	41	Female	Administrator	Finance	Mixed Tape
22	Lorraine	28	Female	Campaign Executive	Social Marketing	N/A
23	Ali	37	Male	PhD Student	Education	Steadfast Pirate
24	Rory	19	Male	Student	Education	Steadfast Pirate
25	Jack	18	Male	Student	Education	Ex-Downloader
26	Scott	35	Male	Label owner	Music	Mixed Tape
27	Brian	45	Male	Banker	Finance	Old schooler
28	Paul	32	Male	Public Relations Advisor	Public Relations	Mixed Tape
29	Gerry	23	Male	Unemployed	N/A	Mixed Tape
30	Kieran	18	Male	Student	Education	Steadfast Pirate
31	Laura	34	Female	Radio host	Media	Old schooler
32	Steve	19	Male	Student	Education	Mixed Tape
33	Ciara	18	Female	Student	Education	Mixed Tape
34	Eric	19	Male	Student	Education	Ex-Downloader
35	Karen	33	Female	Computers	IT	Mixed Tape

Table 2. Typology of Music Consumers

	Steadfast pirates	*Ex-Downloaders*	*Mixed Tapes*	*Old Schoolers*
Level of Piracy	• High	• Used to be high but currently pursue legal alternatives more often	• Sporadic	• None
Technological Literacy	• High – able to work around web encryption	• High – early adapters to new technologies	• Reasonable – able to pirate music	• Poor
Moral Position on Piracy	• Low guilt – take a moral position in favour of it. • Question industry's morals	• Low-guilt – more concerned with utilitarian qualities of music consumption	• Express high level of guilt for smaller artists and labels	• See piracy as morally inexcusable
Effectiveness of Fear and Guilt Appeals	• Low	• Low	• Low	• High
Attitudes Towards Music industry	• Anti-industry such as using the industry's actions regarding price and quality of music promoted to justify piracy	• Indifferent: Concerned more with utilitarian qualities of music consumption	• Highly resistant to mainstream industry • Claim to support small or independent stakeholders	• Supportive: Believe that all artists have to be rewarded fairly for output. • Suspicious of streaming services because of artist royalty issue
Consumption of Legal Digital Music	• Low	• High	• Medium	• Low
Non-Digital Music Consumption	• Low	• Low	• Medium	• High