

# The Leading Question

## Speakerbox 2008/9

The UK's most comprehensive and cutting edge digital music consumer research study  
– now in its 4th year



## The Leading Question: Essential Digital Music Research

Combining consumer research, music industry and real-world commercial expertise, The Leading Question is a specialist consumer research agency which provides clients with unique insights into winning business models for today and the long term. We specialise in digital media including music, film, TV and related technology industries. In addition to sector-wide annual projects such as the highly regarded Speakerbox initiative, The Leading Question also carries out bespoke research and consultancy projects. As a partnership backed by the leading digital music research agency MusicAlly and consumer research specialists The Strategy Room, we offer clients an end to end solution from consumer research and insight to strategic advice and implementation.

### **The Leading Question team brings together unbeatable expertise and experience in:**

- ▶ Quantitative and panel research
- ▶ Focus group facilitation
- ▶ Customer segmentation
- ▶ Business strategy and business modelling
- ▶ Market sector and data analysis
- ▶ Market and beta testing of services and devices
- ▶ Digital and physical retail
- ▶ Workshop development
- ▶ Brand development and marketing



# The Leading Question **Speakerbox 2008/9**

**Speakerbox** is a unique project. It's the biggest and most longstanding digital music survey of UK consumer behaviour. Each year it has attracted blue chip clients including the likes of Universal Music, Warner Music, EMI, Orange, Tesco, BBC and Sony Ericsson. It offers a dynamic three stage process providing a comprehensive end to end and cost effective solution:

- ▶ Over 1,000 face to face interviews
- ▶ Focus groups with key digital consumer segments
- ▶ Interactive workshop delivery of research results

## **Speakerbox 2008/9 key benefits include:**

- Project covers all aspects of digital music behaviour and attitudes on an exclusive, client confidential basis
- Clients have access to FOUR years worth of key trending data
- Project costs are shared between the participating clients
- Tap into our expertise in survey design and execution, industry knowledge and commercial insight
- Quantitative and qualitative data provides comprehensive consumer feedback
- Deliverables include: full data results with comprehensive range of analysis variables; face to face client presentation and workshop insight de-brief; comprehensive powerpoint presentation of key results; summary document telling the 'story' of the results; roundtable client conclusions discussion session

## **Timetable**

**Client marketing/sign-up:**

**August/September 2008**

**Field research:**

**September/October 2008**

**Findings released:**

**November/December 2008**



## Guideline Speakerbox 2008/9 research topics

*(final scope will be agreed with participating clients only):*

### Digital tribes

- Segmenting the digital consumer: understanding music consumption, lifestyle, sharing habits
- Matching user behaviour to music genres
- Free riders – understanding the best ways to monetise 'free' music
- What drives different consumption levels?
- Which business models appeal to which digital tribes?

### Digital retail dynamics

- Pricing: single tracks, albums, mobile, subscription
- Understanding which digital extras consumers value most
- Digital stores/services: which brands do they trust and what factors contribute to loyalty?
- File audio quality – does it matter, if so, to which kinds of music fans?
- DRM and usage restrictions – does the consumer understand or care about DRM?

### Music and ISPs

- How can music be used by ISPs as an added-value benefit?
- Understanding the relevant price points
- Do consumers want to continue using file sharing sites? What added value music services do they want from their ISP?
- What do music fans feel about the so-called "3 strikes and you're out" policy? How do music fans consider alternative solutions such as bandwidth throttling and content filtering and monitoring?

### Alternative consumption models

- Bundling music with hardware and devices
- Next generation subscription services: which are the new subscription models likely to gain most consumer traction?

- Mobile music offerings: role of music tariffs, unlimited services (such as Nokia's 'Comes with Music')
- Live – what appetite is there for content off the back of live shows – eg behind the scenes footage, live shows /post show streams delivered to handsets

### Understanding the music discovery/ buying process

- How do music fans find out about new music?
- Radio v TV v blogs v word of mouth v search engine etc
- Understanding the music purchasing process

### Understanding music ownership

- To what extent are consumers still interested in owning music? Is access to music as important as owning music?
- Understanding the a la carte value proposition
- Single track v album consumption
- How disposable is digital music? What do music users do with their digital downloads? Is paid for music treated differently to free downloads?

### Experiential music and music as brand enhancement

- Understanding what consumers value in terms of music related offerings. Free v exclusivity.
- How does music fit into experiential marketing?
- What makes music fans decide to enter or not enter competitions?
- How can music be matched with the branding and promotional strategies of other consumer products – where are the key synergies?

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**Leveraging our experience and knowledge of how digital consumers are evolving we will be building this into the selection criteria and segmentation of our focus groups. Proposed segments will include:**

- ▶ Mobile music enthusiasts
- ▶ Digital discoverers & opinion leaders
- ▶ '50 quid man/woman' (high physical spenders not yet converted to digital)
- ▶ Digital dabblers
- ▶ Music pirates
- ▶ Silver surfers

## **What our clients say:**



"As a client of Speakerbox since its inception in 2005 we have found it an invaluable insight resource. It has helped to inform our music strategy and consumer-focused innovations. The Leading Question brings a practical, commercial approach backed by the specialised industry knowledge essential in this fast moving sector."

**Richard Wheeler**, Head of Music and Film Partnerships, Orange UK



"Speakerbox delivers the key customer data we need to be at the cutting edge of digital music business models, backed by a deeper understanding of longer term trends and behavioural changes. The Leading Question works hard to identify and meet our consumer insight needs, and to present and de-brief findings to our organisation effectively."

**Francis Keeling**, Commercial Director, Digital, Universal Music Group



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