

Master's Thesis:

**Factors Influencing Japanese Consumers' Purchase Intention of
Subscription Streaming Services**

by

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Certification Page

I, SIHITE Ardeley Mae (Student ID 52117633) hereby declare that the contents of this Master's Thesis are original and true, and have not been submitted at any other university or educational institution for the award of degree or diploma.

All the information derived from other published or unpublished sources has been cited and acknowledged appropriately.

Ardeley M. Sihite

SIHITE Ardeley Mae

2019/05/31

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Summary

Online streaming services give users access to a wide variety of content, including music and videos on demand. The overwhelming success of popular streaming services, such as Spotify or Netflix, has brought international attention to the growing industry. Music as a Service (MaaS), has revitalized the music industry with impressive revenues generated through subscription model strategies

Despite having favorable conditions for the streaming market, Japan has the lowest observed usage rate (18%) of music streaming services. The research study aims to understand this contradictory occurrence by examining factors which may influence Japanese consumers to purchase a subscription to MaaS platforms.

A survey questionnaire was designed to gather data about consumer attitudes and purchase intentions. Convenience sampling was used to conduct the survey in two Japanese-basis classes at Ritsumeikan Asia Pacific University among a sample of 133 respondents. The constructs of Ownership Preference, Tangibility Preference, and Price Value were measured as attitude Likert scales.

Results from correlation and regression statistical analyses indicated that Ownership and Tangibility were not noteworthy factors, but Price Value had a significant positive relationship to Japanese consumer purchase intentions and acted as a predictor variable. Higher than expected purchase intention for streaming subscriptions among Japanese consumers, as well as a need for additional sources of value in MaaS platforms were important discoveries of the study.

Keywords: *Purchase intention, streaming services, music as a service (MaaS), subscription model, consumer behavior*

1. INTRODUCTION

Online streaming services are a recent innovation in our increasingly digital world. They give users access to a wide variety of content, including music and videos on demand, through personal devices such as mobile phones, tablets, computers, video game consoles and even smart-TVs. The overwhelming success of streaming services, such as market-leaders Spotify and Netflix, has brought international attention to the growing industry. Streaming platforms usually operate either on a “free” basis or on a paid subscription model, and sometimes utilize a combination of both. Although some providers have had trouble gaining subscribers by converting free users to paying customers, many have been able to achieve impressive growth and profit viability. This online business model of selling access to content has collectively been termed ‘Content as a Service’ (CaaS) (Dörr, Benlian, Vetter & Hess, 2010). Specifically, the music segment of streaming services, or Music as a Service (MaaS), is of interest due to the high amount of revenue it now generates for the overall music industry.

Previously, consumer access to digital music was restricted to the purchasing and downloading of files from e-stores (e.g. Apple’s iTunes). In the 2000s, platforms such as Pandora Radio and Spotify gained popularity and changed the way that people consumed digital entertainment by allowing users to “stream” songs without downloading files (Grannell, 2018). This set the stage for new business opportunities and lucrative revenue generation

prospects via the subscription model, where streaming services charge customers a monthly fee for unlimited access to an extensive library of content. Several of the current largest global music streaming subscription services are Spotify, Apple Music and Amazon Prime Music (Mulligan, 2018).

In 2015, domestic streaming applications began to appear in Japanese app stores and were quickly followed by big-name global streaming services (Morikawa, 2015). Although Japan is the second largest music industry market in the world, music streaming has not caught on here to the same extent as other countries. Of developed countries, Japan has the lowest adoption rate for music streaming services with 18% of the population using these platforms (IFPI, 2017). Even fewer Japanese consumers are paid subscribers, with one market research survey showing only 10% currently pay for music streaming (Shimada, 2018). The reluctance of customers in the Japanese market to embrace MaaS platforms has become an obstacle which service providers are eager to overcome.

1.1 Background

Global Music Industry

The music industry is a robust and influential commercial sector which operates on a large scale worldwide. In his article on the global music industry, Laing (2009) characterizes it as a “creative industry”, “Copyright industry” as well as “manufacturing industry” made up of three main subsets, which are 1. The Recording Industry, 2. Music Publishing, and 3. Live

Performance. Even more areas may be linked with this far-reaching business sector, but for the purposes of this paper the global music industry shall refer to that which is observed by the International Federation of the Phonographic Industry (IFPI). The IFPI has kept records of data and figures regarding the music industry since 1997 and offers market insights through yearly reports.

Global recorded music products and services are worth billions of dollars in revenue annually. The market in its current state, however, is considerably less profitable than it was before the turn of the century. The music industry’s revenue totals reached their highest point around 1999, with sales from CDs contributing to a massive \$25.2 billion in earnings (Routley, 2018). Since then, the dominance of CDs and other physical formats has declined, and music revenues consistently fell year after year. Global recorded music finally saw growth return in 2015 and has continued to climb up through 2018 to a \$19.1 billion net worth, a 9.7% increase from the previous year (McIntyre, 2019). See Figure 1 for a detailed record of global music earnings published in the 2019 Global Music Report by the IFPI.

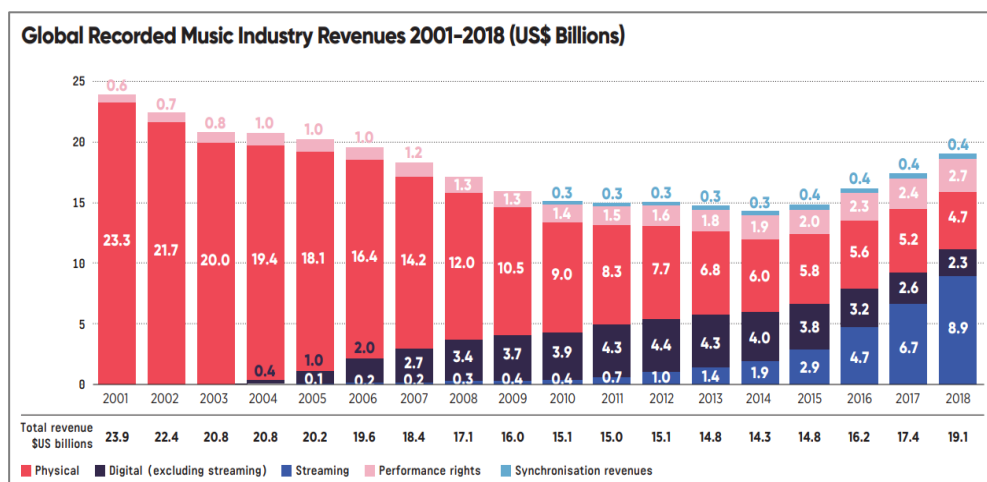


Figure 1 Breakdown of global music industry revenues 2001-2018. Source: IFPI, 2019 p.13

Two trends are apparent in the data shown above as well as in IFPI's evaluation of the music market in recent state of the industry reports. There has been a distinct shift away from physical distribution towards digital distribution of music, and the Streaming segment has clearly become the largest contributor to market growth and profits (IFPI, 2018). Paid subscription and advertising-supported music streaming have been responsible for the current revitalization of the global music industry. In 2018, physical music sales dropped a further 10.1% and digital downloads fell by 21.2%, while streaming grew by a stunning 34% (IFPI, 2019). It now accounts for 47% of total music industry revenues and is projected to continue expanding its majority share over the next several years (IFPI, 2019). Music streaming platforms provided service to 229.5 million paying subscribers in 2018, up from 198.6 million subscribers in 2017 (Mulligan, 2018). According to MIDIA Research, the top global music streaming platforms currently are Spotify, Apple Music, and Amazon Prime Music (Mulligan, 2018).

Understandably, plans for future development and marketing within the music industry are focusing heavily on streaming and how to best take advantage of its success with consumers. The spread of internet access and data-enabled devices to more developing countries provides new opportunities for large numbers of people to begin streaming. Universal Music's market development head, Adam Granite, points out that emerging markets in China, India and Africa represent a potential 4 billion consumers, compared to the 1 billion people

within current top 9 music markets (USA, Japan, Germany, UK, France, South Korea, Canada, Australia, Brazil) (Fildes, 2018). The possibilities for industry growth could be vast, but they rely on the advancement and expansion of music streaming services.

Music Industry in Japan

Japan represents the second largest music market in the world in terms of value, preceded by the United States and followed by the United Kingdom and Germany (IFPI, 2019). It is one of the few remaining markets where physical music distribution still accounts for the majority of sales. The value of Japan’s music industry in 2017 was 289.3 billion yen, of which 80% was contributed by physical music sales and 20% came from digital music sales (RIAJ, 2018). Within the category of ‘digital music’, streaming still contends equally with downloads, the former holding a 46% share and the latter a 47% share of the total. See Figure 2 for a visualization of the distribution of product categories provided by the Recording Industry Association of Japan (RIAJ).

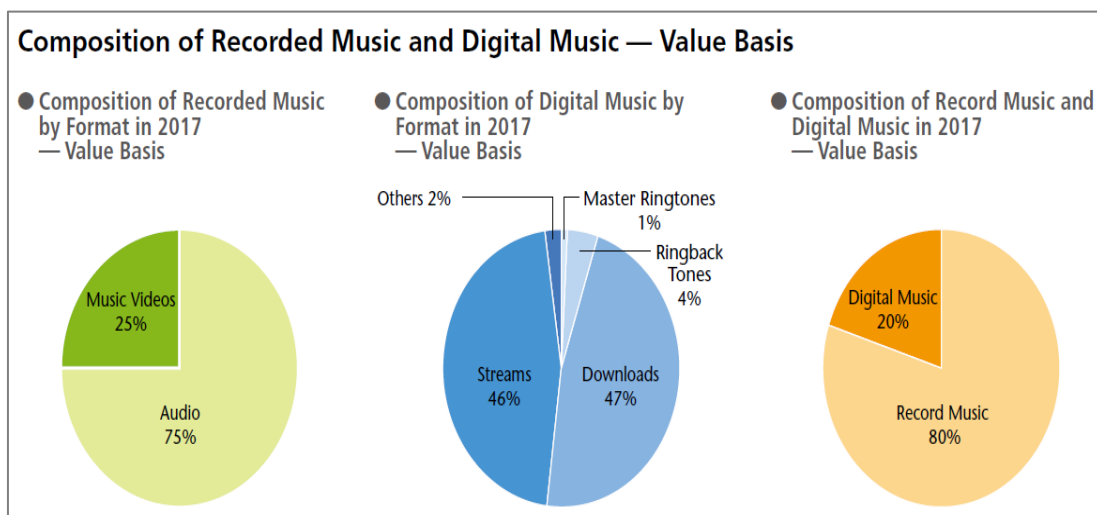


Figure 2 Pie charts displaying product categories within physical recorded music and digital music in Japan's music industry. *Source: RIAJ, 2018 p.1*

One unique feature of Japan's music environment is the use of promotions to appeal to fans of music artists in order to drive CD sales up. An example of this is pop idol group AKB48's method of selling CDs with different album art or included tickets for meet and greet events, which encourages hardcore fans to buy multiple copies of the CD (Sisario, 2014). Government regulations on retail stores to prevent deep discounting also give physical music an advantage in Japan, keeping prices of CDs relatively high for a longer time after their release (WIPO, 2015). The combination of favorable conditions and creative business practices have led to a distinctive culture within the Japanese music industry.

Meanwhile, a variety of factors have led to a more challenging atmosphere for digital music distribution in Japan. Online downloads of singles and soundtracks have fluctuated between decline and growth in recent years, with 2017 seeing a 1% dip in value from 2016 (RIAJ, 2018). Market research reports from McKinsey suggest that Japanese respondents were cautious and slow to accept many digital trends, especially those involving ecommerce (Martin, 2011). Streaming also seems to suffer from these slow rates of adoption, as only 18% of Japanese questioned by the IFPI in 2017 used some form of music streaming service (IFPI, 2017). A survey by ICT Research Institute found that, of those who used streaming platforms, only 10.7% paid a monthly subscription fee (Shimada, 2018). The survey also determined that the age range with the highest usage of music streaming was from teens to 30's, a group that is outnumbered by older generations in Japan's aging society. Other obstacles for streaming

include strict copyright laws, difficulties negotiating with artists and record labels, and free options such as YouTube. Nonetheless, music streaming platforms continue their efforts to penetrate Japan and increase their customer base in this vital location.

1.2 Purpose

Despite the challenges cited above, Japan will remain an important target market with very high potential for music streaming. Providers of content streaming services are in need of resources to more deeply explore the perceptions and usage intentions of Japanese consumers regarding streaming. The results of this study will have implications not only for MaaS businesses, but the entire CaaS industry.

In academic writing regarding Japan, there is a genre of literature known as *Nihonjinron*, which describes Japan as a special place that is very different from other countries due to a complex combination of factors including culture, ethnic identity and social behaviors (Sugimoto, 1999). Often times, the “Japanese way”, or Japanese people will be referred to as exceptional or norm-defying. In his book, *Myth of Japanese Uniqueness*, Dale (2012) criticizes the ideology that Japan is somehow fundamentally different from the rest of the world. However, in the context of the music streaming market, Japan does seemingly present a unique case. Among other developed countries with similar GDP, income levels, internet access, etc. Japan has a much lower penetration rate for music streaming services. What kinds of influences

set Japan apart in this situation? The current study and further focused investigations into consumer behavior may help to explain the lower numbers of Japanese users as well as clarify specific pain points in the streaming industry.

Some prior research has been conducted on the topic of user adoption and willingness to pay for music streaming services. However, many of these studies focus on the issue of music piracy or other moderating factors that may impact consumer intention and behavior. The literature shows that the academic exploration into the topic of MaaS has thus far been quite general. Little research has been done in the way of characterizing particular markets or consumer groups and their attitudes towards subscription streaming services. In order to adapt to a Japanese audience, music streaming providers must take into consideration the factors that affect this customer group's willingness to accept streaming options and purchase a subscription. The following research questions aim to clarify the investigative intent of this paper.

Research questions:

1. Why is the adoption rate of music streaming services much lower in Japan than in other countries?
2. What is the level of purchase intention among Japanese consumers for music streaming services with a subscription-based payment model?
3. Which factors have the strongest influence on Japanese consumers' intention to purchase a subscription to a streaming service?

2. LITERATURE REVIEW

2.1 Content as a Service and Business Model Trends

In a 2010 conference on sustainable e-business management, Dörr, Benlian, Vetter and Hess presented a paper in which they defined a category of ecommerce which they termed ‘Content as a Service’. The authors described CaaS as an online business model and distribution process that involves delivering content to end users by streaming data to them over the internet — no download or transfer of a product would take place (Dörr et al., 2010). Instead, users would gain access to the content for as long as they are a paying member. The content offered by such services has a wide range, from video and music, to games, news articles and more. In outlining CaaS, Dörr et al. (2010) compare it to the related Software as a Service (SaaS) model. For example, Adobe currently offers its software package ‘Creative Cloud’ to individual users for the price of \$52.99 a month (Adobe, 2019). Formerly, a customer might have paid a set amount to purchase one software application from a store, install it to their computer and use it indefinitely. Under the CaaS/SaaS model, the customer now pays for the use of multiple software applications as a service rather than as a product.

Music as a Service (MaaS) is a segment of CaaS which involves the commercial streaming of music. This is in contrast to another main business model for digital music, identified by Dörr, Wagner, Benlian and Hess (2013) as ‘Download-to-Own’. Unlike in DtO

setups, MaaS employs streaming of music in real-time (rather than downloading music files), and flat-rate monthly or annual payments (rather than separate individual transactions). Examples of MaaS platforms include the pioneer music streaming service Spotify, Apple's competitive response Apple Music, or the audio-quality focused Tidal. Several MaaS platforms have gained widespread success globally, while a number of smaller local streaming services have popped up in many regions. In Japan, some of the domestic music streaming services trying to contend with international competitors are LINE Music (associated with the popular LINE messaging app) and AWA (Morikawa, 2015). Users are embracing music streaming services for the unique benefits they provide: access to huge libraries of songs and albums, music recommendations, ability to create personal playlists, and social features such as sharing (Howe, 2019). However, there have been limitations and setbacks for music streaming which may hamper future growth. Burkart (2008, p. 248) argues that copyright holders and the streaming services that license their intellectual property for use by customers gain "distinct advantages" over the users; advantages that do not exist in other music distribution scenarios. The consumers do not gain ownership or rights to any of the songs they listen to through streaming, and if the customer discontinues payment, their music collections or playlists will disappear and no longer be accessible to them (Burkart, 2008). Aside from these concerns, many people do not pay for music streaming simply because they view it as an unnecessary expenditure which offers little value.

The rise of CaaS industries is very much tied to several important shifts in business model trends which have been widely observed. The first is the change that most commercial sectors have been undergoing away from goods/products towards services. Instead of purely marketing consumable products, businesses are increasingly merging their offerings with some form of service or focusing exclusively on provision of services (Vargo & Lusch, 2008). The next overarching shift taking place in today's environment is the ongoing move from the physical to the digital. As technology continues to advance and become ingrained in more aspects of our daily lives, the demand for digital products and services increases. People want what is important to them (be it banking, entertainment, news, etc.) to be available at all times through the internet and through their digital devices. In the words of Curtin, Holt and Sanson (2014, p.4-5), digitalization is "changing the ways in which content is imagined, formulated, financed, produced, promoted, packaged, marketed, measured, delivered, interpreted, enjoyed, and recirculated." Operating in the digital context therefore changes many of the assumptions attached to traditional physical goods and distribution methods. Finally, this ties in with a modern trend which has become one of the latest buzzwords in business, the so-called "sharing economy". This shift has to do with consumers moving towards access-based rather than ownership-based products and services. Companies such as Airbnb and Uber are prime examples of the business model in action. These businesses operate through a digital platform to allow a seller to rent out access to an asset such as accommodation or transportation which

a buyer pays for the use of (Miller, 2018). Meanwhile, the company takes a portion of the transaction price to earn revenue. One theoretical framework supporting the turn towards a sharing economy is put forth by Bardhi, Eckhardt and Arnould (2012) based on Bauman's (2000) idea of 'liquid modernity'. In their paper titled '*Liquid Relationship to Possessions*', the authors claim that in some cases material possessions have become more of a hindrance than a benefit to people, leading them to prefer access-based consumption over ownership-based consumption (Bardhi et al., 2012). Although CaaS and MaaS platforms do not fall neatly into the sharing economy category, the core premise of these services is that they offer customers access to content without giving them ownership of the product.

2.1 Subscription-based Business Model

The major way that music streaming services generate revenue is by operating with a subscription payment system. A subscription-based business model is characterized by recurring monthly or yearly fees to receive a given product/service and generally emphasizes the retention of existing customers over acquisition of new customers (Tarver, 2018). According to Clapp (1931), the notion of 'subscriptions' dates back to 17th century England, when it was a common method for funding industries such as book publishing, trading companies and even insurance. In modern times, a subscription-based model has been implemented for products like magazines or cable television, but recently it has been most successful for online businesses and digital content services.

In the context of online subscription business models, there is another important concept that should be understood. The term ‘Freemium’ is a combination of the words free and premium, describing a strategy often used by software providers and other digital services. A freemium service provides the basic features of its platform to users for free, simultaneously offering a premium version with more advanced and attractive functions which can only be obtained by subscribing to the service (Kenton, 2018). Spotify acts as a good example of this dual-type system. The Spotify application can be downloaded and used by anyone free of charge, but users are exposed to outside advertising and certain features such as the ‘shuffle’ function are unavailable. If the user decides to become a paid subscriber, however, advertisements disappear and they can utilize the full range of features. Below is a diagram outlining the basic mechanics of a freemium subscription business model, according to NCrypted Technologies (Ramvani, 2019).

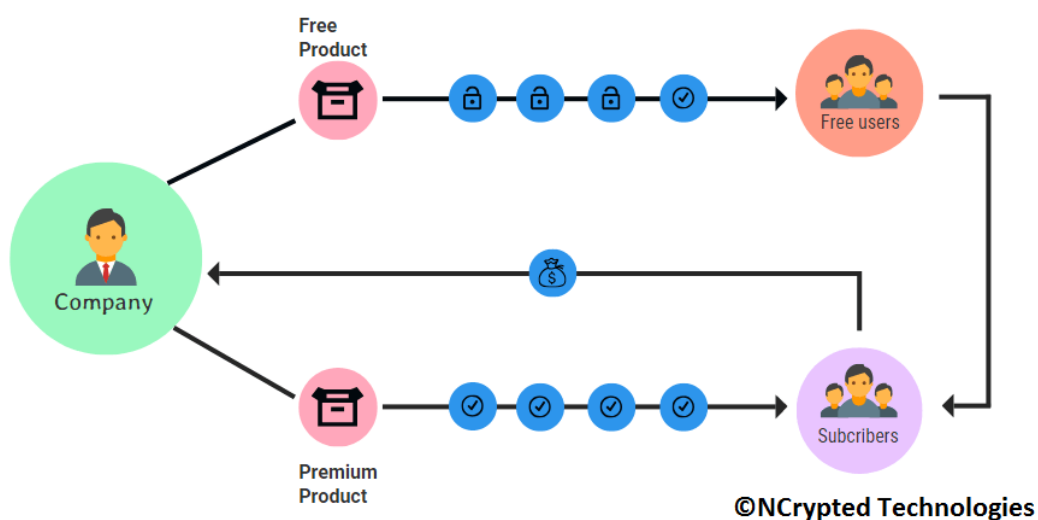


Figure 3 Freemium Subscription Business Model. *Source: NCrypted Websites, 2019.*

When defining Music as a Service, Dörr et al. (2013) acknowledged two main operating models: paid MaaS and free MaaS. Paid MaaS refers to subscription services with a monthly or annual fee, and free MaaS is a streaming service that is supported by advertising revenue rather than user payments. Although streaming services can earn money with a free-to-use option, it seems that the true goal of such a model is attracting large numbers of free users and then converting as many as possible into paid subscribers, who will be far more profitable in the long term (Wlömert & Papiés, 2016). Many music streaming services use this kind of freemium strategy, while some prefer to remain strictly paid subscription services.

There is a downside to offering a free version of a MaaS platform. Streaming providers run the risk that a certain portion of users will decide that they are satisfied enough with the functionality of the basic, non-paid service and therefore decline to become paying subscribers. MaaS platforms must also compete with other free options for online music access, such as YouTube or illegal download websites. Digital piracy of copyrighted material has been studied extensively and was found to be a deterrent to consumers' willingness to pay for music streaming (Giletti, 2011; Helkkula, 2016). With the unprecedented connectedness and ability to access media online, many people have simply become accustomed to listening to music for free. In light of this finding, Kastrenakes and Bi (2015) demonstrated that instead of simply offering huge libraries of content, streaming companies must offer additional value in the form of features and points of differentiation.

2.2 Consumer Behavior and Purchase Intention

Consumer behavior as a concept is defined by Marketing expert C. Glenn Walters (1974, p. 7) as "the process whereby individuals decide whether, what, when, where, how, and from whom to purchase goods and services". This subject is informed by academic disciplines such as psychology and human behavior, and the exploration of consumer behavior trends are integral to many fields, including marketing, advertising and management. According to Kotler and Armstrong (2008), there are four categories of factors that can influence behavior: 1. Psychological, 2. Personal, 3. Social and 4. Cultural. Some of the specific constructs which researchers focus on include consumer perceptions (of quality, usefulness, etc.), brand/ product awareness, attitudes, social influences and more (Brosekhan & Valayutham, 2013). The overall purpose of theorizing about consumer behavior models is to determine influencing variables that help explain certain behaviors (Engel & Blackwell, 1982). This is especially useful for market researchers, who often measure aspects of consumer behavior through surveys and studies in an attempt to understand the needs, wants and preferences of customers.

Psychologists Martin Fishbein and Icek Ajzen (1975) were some of the first to conceptualize a link between behavioral intention and behavior in their publication *Belief, Attitude, Intention, and Behavior: An Introduction to Theory and Research*. Behavioral intention represents an individual's willingness to perform a certain behavior and is determined by the individual's attitude about the behavior, subjective norms and perceived control over

the behavior (Ajzen, 2002). The behavior itself is the observed action of the individual in response to a stimulus or situation (Ajzen, 2002). These concepts would later be applied to many fields of research in which human behavior is key. For example, in business fields such as marketing and advertising, the customer's intention is an important measurement of their overall attitude and interest in the product. In most cases, Purchase Intention is a strong indicator of Purchase Behavior; but it cannot be relied upon as a perfect predictor, since there can be discrepancies between the two concepts and because respondents may not fully understand their own behaviors (Morwitz, 1991). Mooij (2014) also points out that the gap between intentions and behavior can vary from culture to culture based on differing cultural dimensions.

When measuring a survey respondent's purchase intention, the question is usually posed in one of two ways. The first method is to directly ask the subject if they think they will purchase a product ("Do you intend to purchase 'X' in the future?"), while the second option is to ask the probability of the purchase ("How likely are you to purchase 'X' in the future?") (Morwitz, 1991). Prior research has found that results obtained from probability type questions tend to more accurately reflect actual intention and future behavior (Kalwani & Silk, 1984). After gauging a sample's purchase intention, this data can be compared with actual purchase behavior data, if available.

Japanese Consumer Behavior

Literature concerning consumer behavior includes subsets dedicated to characterizing the general behaviors and consumer patterns observed in geographic regions and countries. Culture and ethnicity are considered influencing factors in consumer motivation and behavior, since these dimensions play a significant role in shaping our individual identities (Koo & Le, 2014). Culture, and the values deemed important by each culture, create a set of norms that guide people's behaviors as well as their purchasing habits (Hawkins, Mothersbaugh, & Mookerjee, 2011). Therefore, differences in cultural values across countries, or even within a country, may lead to varying consumption patterns among people with a certain cultural background.

In regard to Japanese consumer behavior, culture is thought to have a substantial impact. Japan has been widely studied by anthropologists and other social scientists and is typically described as a homogenous and collectivist society. Aspects of Japanese culture which contribute to these generalized characterizations include a preference for group harmony, importance of hierarchy/status, and a focus on values of perseverance, duty, saving face, etc. (Mooij, 2014). Hofstede's (2001) cultural dimensions theory is a famous framework which allows for the categorization of nations based on their cultural tendencies across six indexes. Japan scores high in the three dimensions 'Masculinity', 'Uncertainty Avoidance' and 'Long

Term Orientation', while scoring in the lower to medium ranges of the traits 'Power Distance', 'Individualism' and 'Indulgence' (Hofstede Insights, 2018).

The cultural dimension rankings convey information about Japan's general attitudes and societal functions, and these interpretations can, of course, translate over into the realm of Japanese consumer behavior. For example, according to the Hofstede Insights (2018) group, Japan is one of the most highly ranked countries in the world for 'Uncertainty Avoidance'. We can infer from this that Japanese consumers may be slow to adapt to new innovations and prefer to avoid transactions involving perceived risk. These behaviors would also be expected due to Japan's tendency toward 'Long Term Orientation'. The Japanese are characterized as highly informed consumers, learning a lot about a product or service before committing to pay for it (Clammer, 1997). This might indicate that new trends in products or services which do not have an extended history of proven success may take longer for Japanese consumers to adopt. For example, they may put more consideration into the long-term costs versus benefits of a situation where they are asked to pay a monthly subscription fee to access online streaming services.

After Japan's rapid industrialization and growth following WWII, there was a period of "hyper-consumption" fueled by the economic boom and new-found purchasing power of Japanese citizens (Ashkenazi & Clammer, 2000). There was a sense of status and fulfillment

that came with shopping and purchasing goods, especially luxury branded items. Ashkenazi and Clammer (2000) thereby refer to urban Japan as a mass-consumption and materialistic society. An interesting aspect of this consumerism is the collection mentality, in which an individual may take pleasure in gathering a variety of items related to their interests, or perhaps in completing a set which is limited edition. The collection aspect is often encouraged in product categories such as toys, cards, books, other media and so on. In an article explaining why the CD is still immensely popular in Japan, Sisario (2014) claims that Japanese consumers display a particular love for collecting that can go to the extreme, with hardcore fans sometimes purchasing the same CD several times to obtain all possible cover art. Ashkenazi and Clammer (2000) also observed similar habits and reverence of physical objects among Japanese sword collectors, and noted that in this context the act of collecting taps into more profound desires for social networking and self-expression.

Despite the seemingly contradictory perspective detailed above, Japan has also been observed to be a nation of frugal spenders. Especially after the downturn following Japan's economic bubble burst, Japanese citizens have been required to make changes in their spending habits (Clammer, 1997). In the 1980s, Japan was documented to have an impressive savings rate higher than many other countries, but that rate has gradually declined over the years (Horioka, 2009). Yet, in 2015 the average Japanese household's savings was approximately 18 million yen, showing that individuals in the country remain dedicated to putting aside money

and thrifty practices (Tanaka, 2016). In contemporary Japan, customers prefer to spend less for high quality products and gravitate towards ‘affordable luxury’ (Willoughby, 2017). According to McKinsey Quarterly, the ‘new Japanese consumer’ is more value-conscious and increasingly likely to spend time hunting for bargains (Salsberg, 2010). The implication for marketers here is that they should expect Japanese consumers to carefully consider purchases and have a somewhat lower threshold of willingness to pay.

2.4 Measuring Attitudes Towards Streaming Services

As content streaming has become an ever more successful and lucrative industry, it is no surprise that it has also become a subject of interest in business and academic writing. Most advances in the development of streaming technology and distribution have occurred in the last ten to fifteen years, however, so this area of literature is still relatively new and continues to grow each year.

A great deal of the current body of knowledge concerning streaming services approaches it from the lens of an innovative technology or information system. The Technology Adoption Model (TAM) is a well-known framework created by Davis (1989) to quantify the rate of acceptance for new technologies, suggesting that people are influenced by their attitudes towards the ‘usefulness’ and ‘ease of use’ of the technology. This model has been referenced in several research studies into music streaming and new user acceptance of these systems (Guerra, 2015; Helkkula, 2016; Keppels, 2016). The Unified Theory of

Acceptance and Use of Technology (UTAUT2) developed by Venkatesh, Thong and Xu (2012) is also an extensive model which Helkkula (2016) incorporated into research testing the effects of various factors such as hedonic motivation and social influence on consumers' intention to subscribe to music streaming services. In a more problem oriented study, Giletti (2012) explored the relationship between attitudes toward digital piracy and illegal downloading to people's willingness to pay for MaaS platforms.

Besides research focused entirely on attitudes, several examples exist of studies that aim to investigate customer preferences and their effects on acceptance and purchase intention of MaaS. Dörr et. Al. (2010). conducted a study on pricing and music quality and other features that people most preferred in music streaming services. A "Need for Touch" scale was used by Styvén (2010) in order to understand consumer preferences for tangibility in the age of digital music and streaming. This was based on Peck and Childers' (2003) previous findings that the ability to touch and feel a product has a significant effect on purchase behavior. Through the understanding that the intangibility of streaming increases consumer perception of risk, several recommendations emerge to circumvent this issue, such as incorporating tangible cues to the experience or emphasizing branding (Styvén, 2010). Perceived risk is an additional construct which has been explored by Kunze and Mai (2007) in the context of user adoption of streaming, where they concluded that risk of performance and time-loss were the most negative influential factors. Wagner and Hess (2013) point out that it is essential for streaming industry actors to

understand the different influences which develop positive purchase intention of a streaming subscription, especially in the case of converting free users to paying customers.

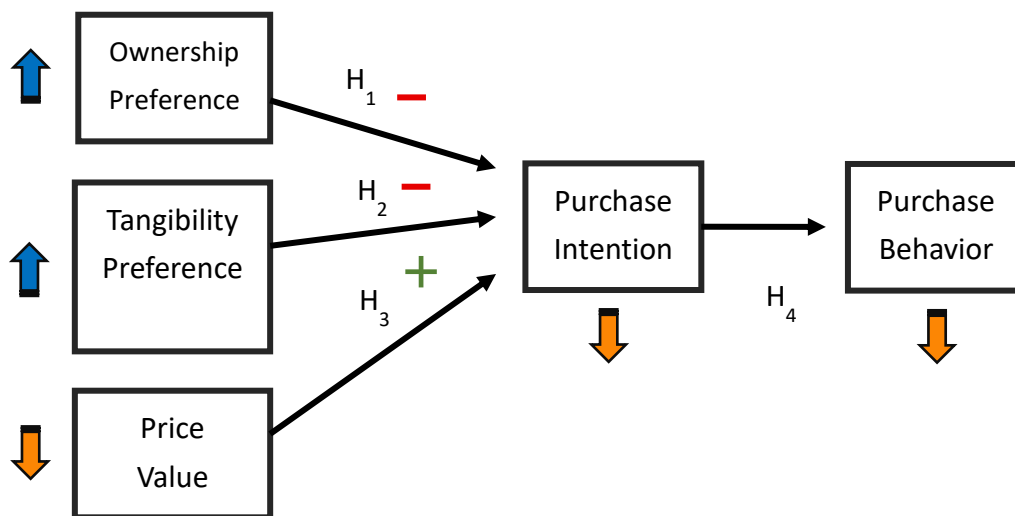
3. CONCEPTUALIZATION

The literature regarding Japanese consumer behavior indicates several qualities which may begin to clarify why the adoption rate of music streaming services is low in Japan. The first observation is that Japanese consumers can be skeptical and wary of change. Japanese society often takes measures to minimize risk and ambiguity by implementing rigid laws and regulations and placing high value on tradition and customs. This is a demonstration of Japan's high levels of Uncertainty Avoidance (Hofstede, 2018). On an individual level, such an outlook may lead to a distrust of new technologies or ideas, and a general unwillingness to accept them until they have been proven useful by others. Another relevant dimension of Japanese consumer behavior is an inclination for materialism. People in Japan have a complex relationship with consumerism and physical objects, as demonstrated by the strong culture of collecting (Ashkenazi & Clammer, 2000). Lastly, the prudent nature of customers in Japan suggests an environment where products and services must offer good value for an affordable price. Japanese consumers may not be satisfied with prices they deem to be too high or products which do not deliver to expectations.

Much of the research that seeks to explain the behavior and purchase decisions of consumers focuses on linking behavior to intentions by discovering which factors have an impact on those intentions. The existing literature was surveyed to find an assortment of constructs which have been tested for significance in their relationship to developing

intention and behavior. Three constructs were chosen to represent the formerly described attributes of Japanese consumers.

Firstly, Purchase Intention and actual Purchase behavior of consumers must be measured and recorded. Then, a series of construct scales will be used to discover respondents' attitudes towards music streaming services. The constructs of Ownership Preference (OP) and Tangibility Preference (TP) will help to determine if uncertainty and materialism are factors which contribute to respondents' purchase intention. Japanese consumers are anticipated to have a high preference for ownership and tangibility, which would cause a lower number of users to be interested in paying for access to intangible streaming subscriptions. The construct of Price Value (PV) will determine if Japanese consumers perceive music streaming services to provide high value for the cost of the monthly subscription fee. Since Japanese consumers can be viewed as relatively frugal and less likely to indulge in unnecessary spending, it is theorized that respondents will score the price value of music streaming as low. The conceptualization of the relationship between these three constructs and consumer purchase intention and purchase behavior towards music streaming subscriptions is visualized in the following graphic.



Hypotheses

There are four hypotheses illustrated by the conceptualization which are outlined as follows.

H₁: High Ownership Preference will have a significant negative effect on Purchase Intention of music streaming services.

H₂: High Tangibility Preference will have a significant negative effect on Purchase Intention of music streaming services.

H₃: Price Value will have a significant positive effect on Purchase Intention of music streaming services, however, observed Price Value levels will tend to be low.

H₄: Low Purchase Intention will reflect low levels of Purchase Behavior of music streaming services.

4. METHODOLOGY

The study was carried out with a primarily quantitative approach, in the form of an online survey which asks respondents to answer several questions and scales relating to their usage and attitudes toward music streaming services. The survey also includes some qualitative optional open-ended questions in order to gain valuable insights into specific ideas and feelings of participants. The use of a mixed method research framework provides further context as well as the benefit of a more in-depth understanding of respondents' true feelings, as suggested by Creswell (2003). Additionally, when the topic of research has not yet been extensively investigated, mixed methods can be useful for developing a more comprehensive and valid inquiry (Hurmerinta-Peltomaki & Nummela, 2006).

4.1 Survey Development

The online survey was constructed to gather information about respondents' awareness/usage of MaaS, as well as their attitudes and purchase intention towards music streaming services. Demographic information regarding gender, nationality and age range were asked at the beginning of the questionnaire. Since the desired data consisted of responses from Japanese consumers, 'nationality' also served as a screening question to ensure only pertinent data would qualify for final analysis. However, to avoid response bias, participants with a nationality other than 'Japanese' were not immediately disqualified but allowed to complete

the entire survey. Responses obtained from non-Japanese participants would later be removed during the data cleaning process. Such a method is suggested for rejecting unwanted observations and consolidating relevant data points (Elite Data Science, 2016).

The scales used in the survey were adopted from relevant literature and revised to match the theme and context of this study. Constructs measured include the following: Purchase Behavior & Purchase Intention (Venkatesh et al.), Ownership Preference (Kuijeren, 2012), Tangibility Preference (Styvén, 2010) and Price Value (Helkkula, 2016). Since the constructs have all been sourced from the existing literature and have been previously tested for validity, we can reasonably assume that the level of content validity is satisfactory (Hair, Black, Babin & Anderson, 2010).

Purchase Behavior (PB) and **Purchase Intention (PI)** are constructs that were linked by Ajzen (1991) in his Theory of Planned Behavior. PB refers to the actual behavior being observed and is predicted by the consumer's behavioral intention. In the case of this study, purchase behavior is whether or not a person subscribes to a music streaming service. PB was determined by asking respondents if they currently pay for any music streaming services, with 'Yes' or 'No' as possible choices. Purchase Intention is then measured by asking respondents to rate their response to the following question:

“How likely are you to subscribe (or continue subscribing) to a music streaming service within the next 6 months?”

Respondents may choose from options on a 5-point Likert item where 1= “Definitely won’t subscribe”, 2= “Might not subscribe”, 3= “Unsure/Don’t know”, 4= “Possibly will subscribe”, and 5= “Definitely will subscribe”.

Ownership Preference (OP) was measured with two items from the Need for Ownership scale used in Kuijeren’s (2012) study on consumer preference for MaaS or DtO platforms. Kuijeren (2012) developed the scale by modeling it after Ball & Tasaki’s (1992) scale for attachment in consumer behavior. Survey respondents were instructed to think about their personal music collection, whether it be in the form of physical CDs or downloaded music files, and rate the following two statements on a 5-point Likert item. On this scale and all following construct measurement scales, 1= “Disagree”, 2= “Somewhat disagree”, 3= “Neutral”, 4= “Somewhat agree”, and 5= “Agree”.

OP1: *“If someone admires my collection of music, I also feel a little admired.”*

OP2: *“If my collection of music were to be lost, I also feel like a part of me is lost.”*

The construct **Tangibility Preference (TP)** was taken from Styvén’s (2010) exploratory study and slightly modified to apply to the MaaS context. TP was measured with two survey items scored by respondents on the 5-point Likert response item.

TP1: *“It is important to me to have music in a physical format, such as CD or record.”*

TP2: *“I feel that music in physical format is more “real” or genuine than digital music.”*

Finally, **Price Value (PV)** was adopted from a study on consumer intention to subscribe to music streaming services by Helkkula (2016). Respondents were presented with the following two statements and asked to choose their level of agreement from the 5-point Likert item.

PV1: *“Music streaming services are reasonably priced.”*

PV2: *“Music streaming services offer good value for money.”*

As the aim of the study is to characterize the viewpoints of Japanese consumers, it was important to consider how best to conduct the survey among the target participants. Much of the literature about international research surveying concludes that it is best practice to offer questionnaires in the native language of the respondents (Harzing, Reiche & Pudelko, 2012). Participants are more confident and sure about their attitudes and beliefs when given a survey in their native language, ensuring that responses obtained are more valid (Harzing, 2006). The researcher used personal language knowledge and skills to create a survey in English and translate it into Japanese. The Japanese version was then checked for understanding and correctness by two expert native speakers who are also knowledgeable in English, as recommended by Harkness & Schoua-Glusberg (1998). After the review process confirmed the appropriateness of the wording, the survey was deemed ready for distribution to respondents. Please see Appendix 1 for the final format of the survey and its Japanese translation.

4.2 Data Collection

In order to collect data on Japanese consumer purchase intention for subscription music streaming services, the online survey was distributed to two Japanese-basis (Japanese as the language of instruction) classes at Ritsumeikan Asia Pacific University. The sample was selected via convenience sampling method based on the logic that young adults aged 18-34 have the highest music streaming rate (79%) and are the primary targets for streaming services (Morning Consult, 2018).

The survey was open for a period of approximately 3 weeks, from January 10th to January 31st, 2019. It was created using Google Forms and the access link was shared with two professors who then distributed the survey in their class. A total of 184 submissions were collected. Of these, 51 responses obtained were from non-Japanese participants and these were subsequently excluded from the data set. There were no instances of missing values or other inconsistencies in the data. The final sample consisted of 133 responses from Japanese participants. Though this is a somewhat small sample for quantitative analysis, it is adequate for the purposes of this study. Green (1991) advises that when attempting any form of regression analysis, the sample size should be determined with the equation ' $n > 50 + 8p$ ' where p is the number of predictors. This research proposes 3 predictors Ownership Preference, Tangibility Preference, and Price Value for the dependent variable Purchase Intention.

Therefore, the minimum sample size should be 74 and our current sample exceeds this requirement.

5. RESULTS & ANALYSIS

5.1 Sample Characteristics

Table 1 Demographic distribution of the sample

Demographic Information	Frequency (n=133)	Percentage
Gender		
Female	54	40.60%
Male	78	58.65%
Other	1	0.75%
	Total: 133	Total: 100%
Age Range		
10s	14	10.53%
20s	117	87.97%
30s	0	0.00%
40s	1	0.75%
50s	1	0.75%
60s	0	0.00%
70s	0	0.00%
80s+	0	0.00%
	Total: 133	Total: 100%

The sample size of this study, once data was consolidated to represent only Japanese respondents as mentioned previously in the methodology section, was equal to 133 people. Table 1 illustrates the demographic characteristics of the survey participants, who were asked to report gender and age. Options for gender included the two traditional categories of male and female, as well as the ‘other’ category for those who preferred not to answer or do not identify as either male or female. The survey received a higher number of responses from males

(approximately 59%), but the participation rate of females (approximately 41%) allowed for a fairly balanced representation of genders. Age was heavily skewed towards younger respondents, with about 11% in their teens and the vast majority of 88% in their twenties. As the survey was conducted at a university, this distribution of age ranges was to be expected. Two respondents were outliers in this regard, one in the 40s age range and another in the 50s age range. Although these fell outside of the lower age range majority, both responses were included in the data set as they still provide valuable information for the research.

5.2 Subscription Music Streaming Service Awareness & Usage

The survey asked respondents to describe their awareness and current usage of music streaming services, as reflected in Table 2 below. When asked if they had been aware of the concept of subscription music streaming before taking the survey, a large proportion of participants (92%) responded 'Yes'. Most of the streaming services had relatively high awareness rates among the sample population, with Google Play Music having the lowest awareness at 49.62%. In response to a question asking whether or not they currently pay for a music streaming service, surprisingly, the majority of 56% replied 'Yes' and 44% replied 'No'. This is a much higher amount of paid MaaS users than expected, in comparison with the low percentage of Japanese users found by the IFPI (~18%) in 2018. However, since this survey almost exclusively received data from young people who are the most likely group to subscribe

to a music streaming service, the results may display an interesting point that young Japanese consumers are increasingly adopting subscription services. The most subscribed to music service among respondents was Apple Music (27%), followed by Spotify (16%) and Amazon Prime Music (13%). Interestingly, the two domestic Japanese music streaming services listed, AWA and LINE MUSIC, had very low usage rates with just 2 and 1 users, respectively. Although domestic streaming services had the advantages of entering the market first and perhaps having a content library more centered around Japanese music (Morikawa, 2015), it would seem that the large international streaming services that dominate the global markets have certainly established themselves in Japan as well. It should also be noted that several of the respondents reported paying for more than one streaming service at the same time.

Table 2 Awareness & usage of subscription music streaming services

Item	Frequency	Percentage
Aware of subscription streaming services (before survey)		
Yes	122	91.73%
No	11	8.27%
	Total: 133	Total: 100%
Specific service awareness		
Apple Music	120	90.23%
Amazon Prime Music	100	75.19%
AWA	80	60.15%
Google Play Music	66	49.62%
LINE MUSIC	102	76.69%
Spotify	105	78.95%

YouTube Music	89	66.92%
Other	11	8.27%
Currently subscribe to music streaming service		
Yes	75	56.39%
No	58	43.61%
	Total: 133	Total: 100%
Subscription by service		
Apple Music	36	27.07%
Amazon Prime Music	17	12.78%
AWA	2	1.50%
Google Play Music	2	1.50%
LINE MUSIC	1	0.75%
Spotify	21	15.79%
YouTube Music	0	0.00%
Other: JOX	1	0.75%

5.3 Correlation & Multiple Linear Regression Statistical Analyses

A statistical analysis of the data was carried out utilizing correlation and multiple linear regression analysis methods. The data set was processed using SPSS Statistics software.

Table 3 Correlation of Purchase Intention & Purchase Behavior

Correlation Matrix			
		PI	PB
PI	Pearson Correlation	1	
	Sig. (2-tailed)		
PB	Pearson Correlation	.829**	1
	Sig. (2-tailed)	0.000	

** . Correlation is significant at the 0.01 level (2-tailed).

Firstly, the relationship between Purchase Intention and Purchase Behavior was confirmed by correlating the data from the two measured constructs. The survey data showed a positive correlation of .829 between PI and PB, which was significant at the 1% level, as seen in Table 3 above. A strong correlation between the two items confirms that in this study Purchase Intention is a highly reliable predictor of Purchase Behavior. The three proposed construct scales that act as influencing factors of Purchase Intention can then also be applied generally to Purchase Behavior, as illustrated by the framework put forth in the conceptualization chapter (Juster, 1966). The frequency distribution of Purchase Intention (see Appendix 2) displays a split tendency toward both ends of the response scale, with the majority of participants indicating a high PI of 5. The Purchase Behavior measurement confirms this trend, as 56% of respondents reported current use of subscription streaming and 44% do not currently pay for streaming subscriptions. This finding contradicts the researcher's theory of low Purchase Intention and Purchase Behavior among Japanese consumers, and thus, Hypothesis 4 of the study is not supported.

Next, a correlation matrix was generated for Purchase Intention and all of the individual items making up the construct scales (e.g. OP1 and OP2 for both items of the Ownership Preference scale). As shown in Table 4, all of the items within a given construct scale were significantly correlated with each other. For the Ownership Preference scale, OP1 and OP2 had significant correlation of .495, while the Tangibility Preference scale showed a

significant correlation of .636, and the Price Value scale correlated significantly at .668. As all of the scale items showed medium to high correlation, it was acceptable to then combine them into construct measurement scales representing the described factors as predictors of Purchase Intention (Clason & Dormody, 1994).

Table 4 Correlation Matrix of individual survey items

Correlation Matrix (Individual Items)								
		PI	OP1	OP2	TP1	TP2	PV1	PV2
PI	Pearson Correlation	1						
	Sig. (2-tailed)							
OP1	Pearson Correlation	0.102	1					
	Sig. (2-tailed)	0.244						
OP2	Pearson Correlation	0.064	.495**	1				
	Sig. (2-tailed)	0.468	0.000					
TP1	Pearson Correlation	0.030	.360**	.505**	1			
	Sig. (2-tailed)	0.736	0.000	0.000				
TP2	Pearson Correlation	0.065	.209*	.440**	.636**	1		
	Sig. (2-tailed)	0.456	0.016	0.000	0.000			
PV1	Pearson Correlation	.418**	0.027	0.073	-0.076	-0.045	1	
	Sig. (2-tailed)	0.000	0.755	0.407	0.384	0.610		
PV2	Pearson Correlation	.621**	0.082	0.065	-0.029	-0.040	.668**	1
	Sig. (2-tailed)	0.000	0.351	0.459	0.741	0.647	0.000	

** . Correlation is significant at the 0.01 level (2-tailed).

* . Correlation is significant at the 0.05 level (2-tailed).

The differences between Likert-type items and Likert scales are delineated by the former being individual questions and the latter being a series of Likert questions that are combined into an aggregate score for data analysis (Clason & Dormody, 1994). Individual Likert-type questions measure people’s attitudes on an ordinal scale. Since it cannot be assumed that everyone perceives the same distance or differences between each response choice, typical descriptive statistics like mean and standard deviation should not be used (Decker, 2018). Boone & Boone (2012) recommend instead calculating median or mode, as well as frequency to display distributions of the response data. Please see Appendix 2 for frequency distribution charts corresponding to the individual items listed in Table 3.

In the case of Likert scales, which are created by combining together the scores of two or more Likert questions and taking the average as the final score to be used for data analysis, mean and standard deviation may be used to evaluate the overall trends of each construct (Boone & Boone, 2012). These descriptive items are listed in Table 5 below. Although Purchase Intention in this study was measured with a single question rather than a Likert scale, its mean and standard deviation are included for comparison with the attitude constructs.

Table 5 Descriptive statistics of Construct Scales

Construct Scales Descriptive Statistics			
	Mean	Std. Deviation	N
PI	3.35	1.70	133

OP_avg	2.71	1.26	133
TP_avg	2.42	1.31	133
PV_avg	3.65	1.09	133

The mean of PI was 3.35, indicating that the typical respondent was in the middle or neutral about their intention to subscribe to a music streaming service. However, according to the response frequency distribution (see Appendix 2), this item was quite polarizing. Most participants rated their PI at 5 (“Definitely will subscribe”) but many others also rated themselves at 1 (“Definitely will not subscribe”). The Ownership Preference scale had a slightly below average mean of 2.71, which suggests that most of the respondents are neutral or do not find it particularly important to have ownership of music as a product/service. Looking at the frequency distribution charts, we can see that responses to OP1 and OP2 were actually more evenly spread among the 5 options, leading to an average somewhere in the middle. The Tangibility Preference scale showed a low mean of 2.42, meaning that most respondents did not feel that music products necessarily need to be tangible or in physical format. The frequency distributions of TP1 and TP2 seem to support this conclusion, as they were visibly skewed left, towards the low end of the response scale. Finally, the Price Value scale had the highest mean of 3.65, showing that the sample group generally felt positively about the value provided by music streaming services. The right-skewed frequency distributions of PV1 and PV2 also substantiate this assumption.

Table 6 illustrates a final correlation matrix between Purchase Intention and the three construct scales labeled as OP_avg, TP_avg and PV_avg. Price Value is the only scale which correlates significantly to Purchase Intention at a significance level of $p < .001$. The result shows that Price Value has a somewhat strong and positive relationship with Purchase Intention, implying that the higher a respondents PV is ranked the higher their PI will be also.

Table 6 Correlation Matrix of Construct Scales

Correlation Matrix (Construct Scales)					
		PI	OP_avg	TP_avg	PV_avg
PI	Pearson Correlation	1			
	Sig. (2-tailed)				
OP_avg	Pearson Correlation	0.095	1		
	Sig. (2-tailed)	0.279			
TP_avg	Pearson Correlation	0.052	.490**	1	
	Sig. (2-tailed)	0.550	0.000		
PV_avg	Pearson Correlation	.578**	0.079	-0.056	1
	Sig. (2-tailed)	0.000	0.364	0.521	

** . Correlation is significant at the 0.01 level (2-tailed).

After finding the correlations between all of the variables, multiple linear regression was performed to test the model. Purchase Intention was entered as the dependent variable while the attitude constructs Ownership Preference, Tangibility Preference and Price Value acted as the predictors (independent variables) of Purchase Intention. The statistical output of the model is displayed in the Tables below.

Table 7, 8, 9 Multiple Linear Regression Analysis Model

Model Summary^b				
Model	R	R Square	Adjusted R Square	Std. Error of the Estimate
1	.584 ^a	0.341	0.326	1.394

a. Predictors: (Constant), OP_avg, TP_avg, PV_avg

b. Dependent Variable: PI

ANOVA^a						
Model		Sum of Squares	df	Mean Square	F	Sig.
1	Regression	129.768	3	43.256	22.265	.000 ^b
	Residual	250.623	129	1.943		
	Total	380.391	132			

a. Dependent Variable: PI

b. Predictors: (Constant), OP_avg, TP_avg, PV_avg

Coefficients^a						
Model		Unstandardized Coefficients		Standardized Coefficients	t	Sig.
		B	Std. Error	Beta		
1	(Constant)	-0.223	0.504		-0.443	0.659
	OP_avg	0.012	0.112	0.009	0.108	0.914
	TP_avg	0.104	0.107	0.081	0.977	0.330
	PV_avg	0.903	0.112	0.582	8.064	0.000

According to the output tables, the model is statistically significant with a p-value of less than .001 ($p < .001$). The R Square value indicates that up to 34% of the variance in the dependent variable, Purchase Intention, may be attributed to the predictor variables. A closer look at the charts will show, however, that only one of the predictors in the model was

significantly related to Purchase Intention. Price Value is confirmed to be a contributor to Purchase Intention with a significance of $p < .001$. As Ownership Preference had a p-value of .914 and Tangibility Preference a value of .330, neither of these variables came close to approaching significance levels. The prior correlation analyses confirm the lack of significant relationship between OP and TP to PI, definitively showing that these two constructs should not be regarded as influencing factors of Purchase Intention. It may then be assumed that of the tested variables, Price Value is the dominant contributor to the .341 R Square value and could be responsible for the given level of variance in Purchase Intention.

5.4 Qualitative Analysis of Open-ended Survey Item

The survey included one open-ended question which provided qualitative data for the study. After a question which inquired whether respondents currently pay for a music streaming service, those who replied 'No' were asked to explain their primary reasons for not doing so. This open question offered survey participants the chance to freely state some of their own ideas and attitudes towards MaaS platforms, and gave the researcher additional understanding of Japanese consumers' preferences in the context of subscription streaming. Table 10 provides a sample of some of the comments and reasons given by survey participants. All responses received are listed in Appendix 3.

Table 10 Responses to Survey Question 9

Responses to Survey Question 9
<i>(If you do not pay for a music streaming service, please explain any reasons why not.)</i>
“Because it costs money”
“I use services other than Spotify and those mentioned above, so I’m not a paid member”
“I want to spend as little money as possible. I tried the free trial before, but I found that there are not many songs that I like available. ”
“Because streaming increases traffic volume (data usage?) ”
“Because you can generally listen to most songs on YouTube”

A recurring theme among the reasons given for not subscribing to a music streaming service was money. The majority of responses were related to the cost of subscriptions or the value (or rather, lack of value) provided by these services in exchange for monthly payments. The idea that music could easily be accessed online for free, so paying for it seemed like an unnecessary expense, was prevalent among many of these respondents. Several claimed that they did not have extra money to spend, while others implied that they simply were not willing to pay for music streaming. One person stated, “I’m satisfied with free music streaming applications”, a sentiment that was shared by several others. Some of the participants mentioned listening to music through other means, such as FM radio or CDs. A few referred to methods of illegally downloading music through digital piracy. There were some answers that seemed to indicate that the respondents did not particularly enjoy listening to music or find it important. An especially interesting reason given was “In order not to listen to music every day”, as if listening to music was some kind of distraction that the individual wanted to avoid.

The responses obtained from the survey respondents who specifically do not engage in paid MaaS were helpful in clarifying some of the areas that Japanese consumers may not be satisfied with when it comes to music streaming. Due to the large proportion of participants that talked about the feeling of not wanting to pay for music, the construct scale of Price Value used in this study is further reinforced as a significant variable for Purchase Intention of music streaming services. The statements can guide further exploratory research, which could perhaps focus more on influencing factors that have to do with economic aspects or attitudes about worth and value.

6. DISCUSSION

6.1 Practical Implications

The results obtained through analysis of the collected data delivered interesting clarifications of the Japanese consumer perspective regarding subscription music streaming services. These insights provide useful implications for marketers, advertisers and managers involved in the MaaS industry. The correlation and regression analysis show that while concepts of ownership and tangibility did not appear to be significantly related to consumer purchase intention, price value is one factor which influences consumer intent to purchase a subscription for a music streaming service. The higher a respondent ranked price value, the higher their purchase intention was likely to be.

Responses received from an open-ended survey question gave critical context for understanding the true perspectives of the consumers. The vast majority of respondents who do not currently use paid MaaS platforms stated that the reason was related to an unwillingness to pay, either because they could not afford the unnecessary expense, or because they saw no reason to pay when they can already listen to music for free through other means. This finding lends support to a point made by authors previously mentioned in the review of literature. For example, Helkkula (2016) concluded in her study that since most people have come to expect free access to music online, streaming services cannot rely on music alone to persuade

customers to subscribe. They must offer additional features and value through their platform in order to ensure that people have more incentive to pay. This seems to be what is needed to grab the attention of Japanese consumers and convince them that a subscription to a music streaming service is a worthwhile investment. This observation can also be applied to a much wider range of related industries. Not only MaaS, but other CaaS businesses can benefit from a deeper understanding of what constitutes value to Japanese consumers.

6.2 Limitations and Further Research

The design and execution of this study were carried out by the researcher within certain constraints of time and feasibility. There were, of course, limiting factors which should be addressed thoroughly. Firstly, the method of selecting survey participants by convenience sampling was not ideal and resulted in what is likely considered a biased response. The study attempts to generalize its results to the population of Japanese consumers, but the sample was heavily represented by young participants in their teens and twenties. Considering that Japan is characterized as an aging society with a much higher proportion of older people than younger people (Armstrong, 2016), the findings of this research may not be indicative of the overall population of Japan. This presents opportunities for continued studies that utilize a similar framework, but test it among different age demographics of Japanese consumers. There is a possibility that the proposed factors of Ownership Preference and Tangibility Preference would have a more significant influence on those belonging to older generations.

An additional limitation may be the level of internationalization present in the sample population. Ritsumeikan Asia Pacific University is a private school in Beppu, Japan which emphasizes globalization and whose student body is about half domestic Japanese and half foreign students. Therefore, due to the Japanese students' higher exposure to international people and events outside of Japan, it may be possible that they have developed cultural values or preferences which differ from other Japanese without similar experiences.

Recommendations for further study include expanding the scope of investigation to other localized regions. Researchers should attempt to characterize the influences of purchase intention of music streaming within the context of different consumer behavior cultures, for example in Latin America. There is even wider potential for insight in studying other forms of streaming subscription platforms outside music, such as video streaming or game streaming.

7. CONCLUSION

The goal of this research was to take a highly relevant and practical area in business and approach it from the distinct theoretical lens of consumer behavior and marketing studies. Music streaming is currently one of the most sensational commercial sectors in existence. Streaming was able to turn around the entire declining global music industry and bring it back to impressive rates of growth in a few short years. The contrast of such a successful business model struggling to gain a foothold in Japan, the second largest music market in the world where a music distribution business logically should thrive, provided a fascinating topic to examine.

The initial research question was (1) *Why is the adoption rate of music streaming services much lower in Japan than in other countries?* Review of the existing literature served to uncover some potential explanations for Japan's lower willingness to accept MaaS platforms. Cultural values of uncertainty avoidance or risk aversion may be involved in this phenomenon, but more detailed analysis is required to confirm if it is indeed related. Additionally, qualitative response data obtained from the survey points to cost and price sensitivity as possible reasons for Japanese consumers to hesitate in purchasing streaming subscriptions. The next guiding question was (2) *What is the level of purchase intention among Japanese consumers for music streaming services with a subscription-based payment model?* As seen in the sample group,

the purchase intention of Japanese consumers was found to be higher than anticipated, with almost 60% reporting that they intended to subscribe to a music streaming service within the next six months. Purchase Behavior also reflected a high level of interest, as 73 out of 133 surveyed individuals say they already pay for music streaming subscriptions. The final research question was (3) *Which factors have the strongest influence on Japanese consumers' intention to purchase a subscription to a streaming service?* The data and statistical analysis show that Price Value has a strong positive relationship to Purchase Intention. PV is a significant explanatory variable that might predict up to 34% of the variance in intention for Japanese consumers' purchase of music streaming subscriptions. Importantly, analysis of the qualitative data implies that Japanese consumers hold an expectation that they can listen to music for free, so the value that a streaming service provides must come from additional sources besides just the music itself.

Although the proposed hypotheses of this study were mostly not supported, the findings contribute new knowledge to the field by exploring consumer purchase intentions of music streaming subscriptions in the specific context of the Japanese market. The data demonstrated that Japanese consumers are more receptive to subscription streaming than they previously have been, and that marketers have an opportunity to improve acceptance of paid MaaS by strengthening consumers' perceived Price Value of becoming a subscriber.

In conclusion, the research process added valuable insights and laid important groundwork for further study of consumer behaviors relating to streaming services and how this might be influenced by different cultural backgrounds. The results should also be relevant to industries that are similar in nature to content streaming and wish to improve performance with Japanese customers. Online social media networks, digital content providers and ecommerce businesses must all adapt to consumer behaviors and preferences of the markets they intend to progress in.

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Appendix 1

Survey on Music Streaming Services 音楽ストリーミングサービスに関するアンケート

This survey will be kept anonymous and will be used only for the purpose of academic research. Thank you for your cooperation.

このアンケートは匿名で行われ、学術研究目的でのみ使用されます。ご協力よろしくお願いします。

Demographic Questions

1. Gender 性別

- Male 男性
- Female 女性
- Other/ Prefer not to answer その他 / 答えたくありません

2. Nationality 国籍

- Japanese 日本
- Korean 韓国
- Chinese 中国
- Other: _____

3. Age range 年齢

- Teens 10代
- 20s 20代
- 30s 30代
- 40s 40代
- 50s 50代
- 60s 60代
- 70s 70代
- 80s+ 80代以上

Awareness and Usage Measurement

(Brief description of subscription music streaming services 音楽ストリーミングサービスについて)

音楽ストリーミングサービスとは、料金定額で音楽が聴き放題なサービスです。1ヶ月1000円以下ほどの料金で、数百万～数千万の曲を聞くことができます。さらに、広告表示が入らない、独自のプレイリストが作れるなどの機能もあります。PC、スマートフォンやタブレット

トのデジタルデバイスでストリーミングサービスのアプリが使えます。人気なサービスでは、Spotify や Apple Music があります。

4. Before taking this survey, were you aware of subscription music streaming services?
このアンケートをする前に、音楽ストリーミングサービスを知っていましたか？
 Yes はい
 No いいえ

5. Which of the following music streaming services do you recognize?
以下のストリーミングサービスのどれを知っていますか？
 Apple Music (アップルミュージック)
 Amazon Prime Music (アマゾンプライムミュージック)
 AWA (アワ)
 Google Play Music (グーグルプレイミュージック)
 LINE MUSIC (ラインミュージック)
 Spotify (スポティファイ)
 YouTube Music (ユーチューブミュージック)
 None どれも知らない

6. Do you know of any other paid subscription music streaming service(s)?
他の音楽ストリーミングサービス（購読料があり）を知っていますか？
 Other (Specify)

7. Do you currently pay for any music streaming service(s)?
現在、何かある音楽ストリーミングサービスの購読料を支払っていますか？
 Yes はい
 No いいえ

8. Those who answered 'Yes' to question 7, which service(s) are you subscribed to?
質問 7 で「はい」と答えた方は、何の音楽ストリーミングサービスを購読していますか？
 (Specify)

9. If you do not pay for a music streaming service, please explain any reasons why not.
有料会員になることをしない場合は、なぜの理由をお聞かせ下さい。
Open-ended question/answer

10. How likely are you to subscribe (or continue subscribing) to a music streaming service within the next 6 months?

今後6か月以内に、音楽ストリーミングサービスを購読する（または引き続き購読する）可能性はどのくらいですか？

- Definitely won't subscribe まったく購読しない
- Might not subscribe たぶん購読しない
- Don't know/ Unsure どちらにしてもわからない
- Possibly will subscribe たぶん購読する
- Definitely will subscribe 絶対に購読する

Attitude toward MaaS Construct Measurements

Please choose the extent to which your ideas and actions apply to each following opinion or statement.

あなたの考えや行動に当てはまるものをお選びください。

(Ownership Preference)

11. Think about the music that you own, such as CDs, records, or downloaded files.

If someone admires my collection of music, I also feel a little admired.

CD、レコード、ダウンロードしたファイルなど、自分が所有している音楽コレクションについて：誰かに自分の音楽コレクションを賞賛されたら、自分のことも少し賞賛されたと感じる。

- 1 Disagree あてはまらない
- 2 Somewhat disagree あまりあてはまらない
- 3 Neutral どちらとも言えない
- 4 Somewhat agree ややあてはまる
- 5 Agree あてはまる

12. If my collection of music were to be lost, I also feel like a part of me is lost.

自分の音楽コレクションが失われたら、自分の一部も失われたように感じる。

- 1 Disagree あてはまらない
- 2 Somewhat disagree あまりあてはまらない
- 3 Neutral どちらとも言えない
- 4 Somewhat agree ややあてはまる
- 5 Agree あてはまる

(Tangibility Preference)

13. It is important to me to have music in a physical format, such as CD or vinyl

私にとって、CDやレコードのような有形フォーマットの音楽を持つことは重要だ。

- 1 Disagree あてはまらない
- 2 Somewhat disagree あまりあてはまらない
- 3 Neutral どちらとも言えない
- 4 Somewhat agree ややあてはまる
- 5 Agree あてはまる

14. I feel that music in physical format is more “real” or genuine than digital music

有形フォーマットの音楽はデジタル音楽よりももっと「本物」または純正の音楽だと感じる。

- 1 Disagree あてはまらない
- 2 Somewhat disagree あまりあてはまらない
- 3 Neutral どちらとも言えない
- 4 Somewhat agree ややあてはまる
- 5 Agree あてはまる

(Price Value)

15. Music streaming services are reasonably priced.

音楽ストリーミングサービスの料金は適正だ。

- 1 Disagree あてはまらない
- 2 Somewhat disagree あまりあてはまらない
- 3 Neutral どちらとも言えない
- 4 Somewhat agree ややあてはまる
- 5 Agree あてはまる

16. Music streaming services offer good value for money.

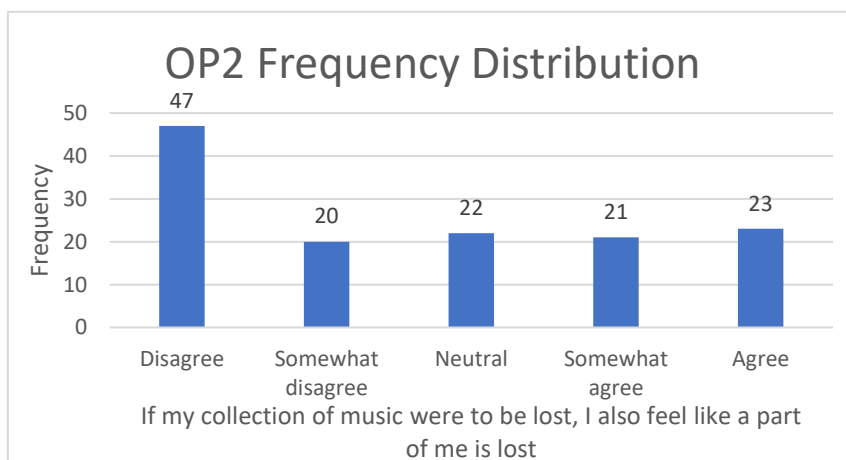
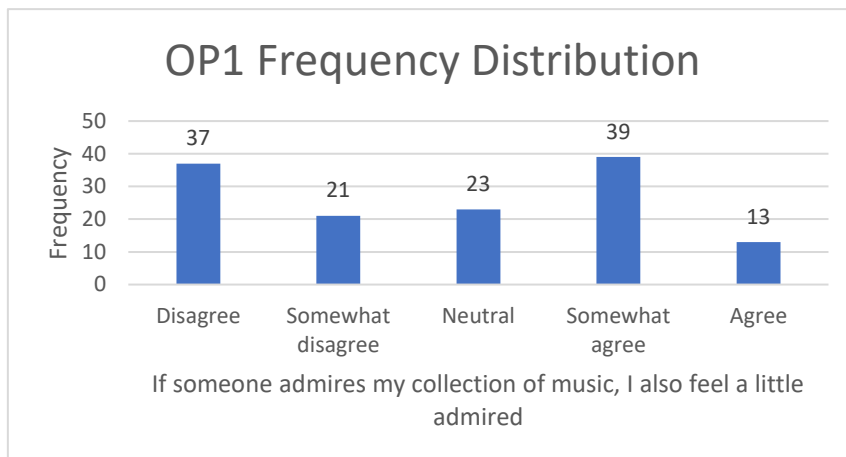
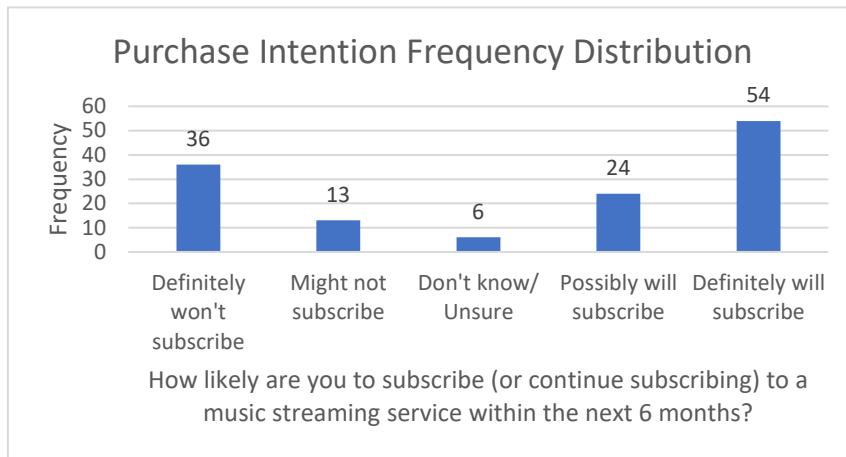
音楽ストリーミングサービスはお金を払う価値がある。

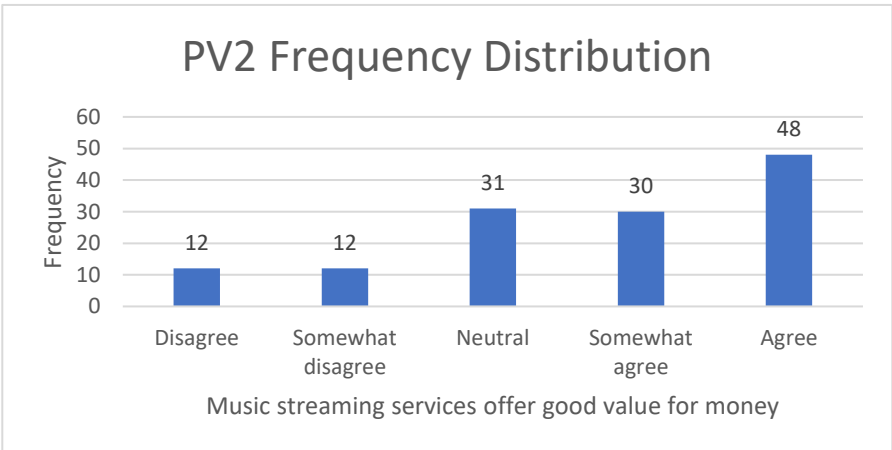
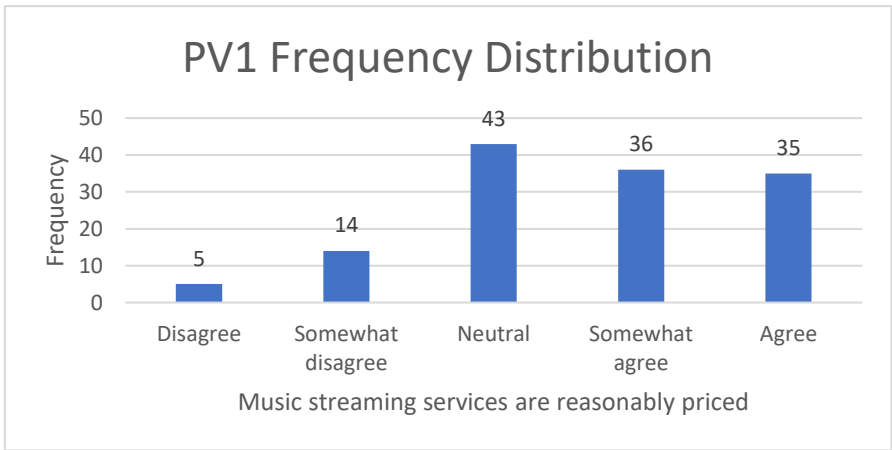
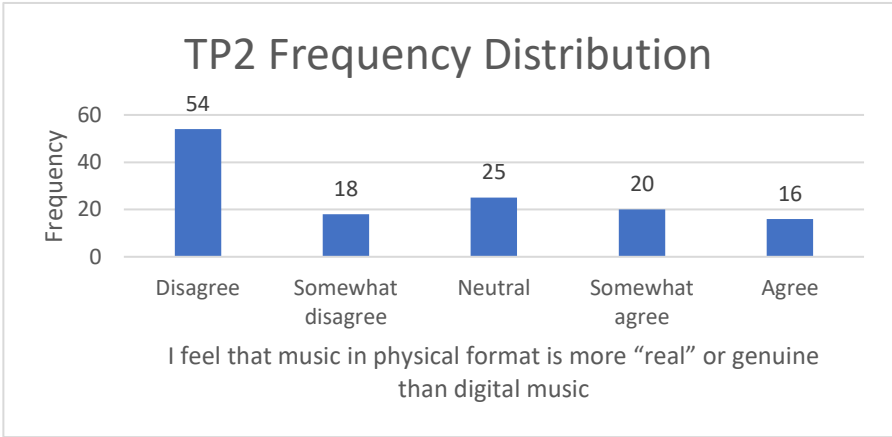
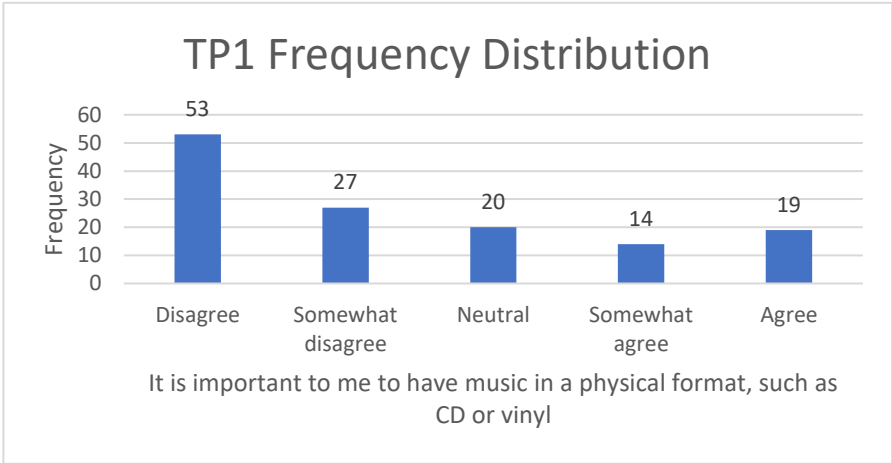
- 1 Disagree あてはまらない
- 2 Somewhat disagree あまりあてはまらない
- 3 Neutral どちらとも言えない
- 4 Somewhat agree ややあてはまる
- 5 Agree あてはまる

This concludes the survey. Thank you for your participation

これでアンケートを終了します。ご参加ありがとうございました。

Appendix 2





Appendix 3

*All responses translated by the author from original Japanese to English

Responses to Survey Question 9
<i>(If you do not pay for a music streaming service, please explain any reasons why not.)</i>
“Because it costs money”
“I use services other than Spotify and those mentioned above, so I’m not a paid member”
“I want to spend as little money as possible. I tried the free trial before, but I found that there are not many songs that I like available. ”
“Because streaming increases traffic volume (data usage?) ”
“Because you can generally listen to most songs on YouTube”
“Because I don’t think advertising is annoying”
“I don’t have money”
“Because there are free music streaming apps available”
“I don’t have the need to listen to music to the point of paying money”
“I listen on other media”
“I don’t want to pay for music”
“I’m satisfied with free music streaming applications”
“I listen to music through free channels”
“Instead of selecting and buying only music that you like, I would rather listen to a playlist that I created ”
“I listen on other media”
“I am satisfied with listening for free”
“I listen to music on FM radio”
“Because it’s not a necessity”
“I don’t think I need to pay any special money to get rid of ads, but I can listen for free”
“With advertisements I can listen for free, so I don’t think I need to pay extra money”
“I feel that it is a waste of money to pay for music, since you can listen for free with other music applications”
“Because I can download songs for free, and I mainly use other applications”
“Because the fee is expensive”
“Because I buy CDs”
“Because it’s expensive”
“I don’t like music enough to pay for it”
“Because there are ways to listen to music without paying for it”
“Because I decided that it wasn’t necessary”
“Simply because I don’t have money for it”

"It's not important enough to pay for"
"There are apps to listen to music for free/ Free apps are enough for me"
"Because there are free versions available"
"You can listen to music without paying for it"
"You can download songs"
"In order not to listen to music every day"