Music Consumption in China
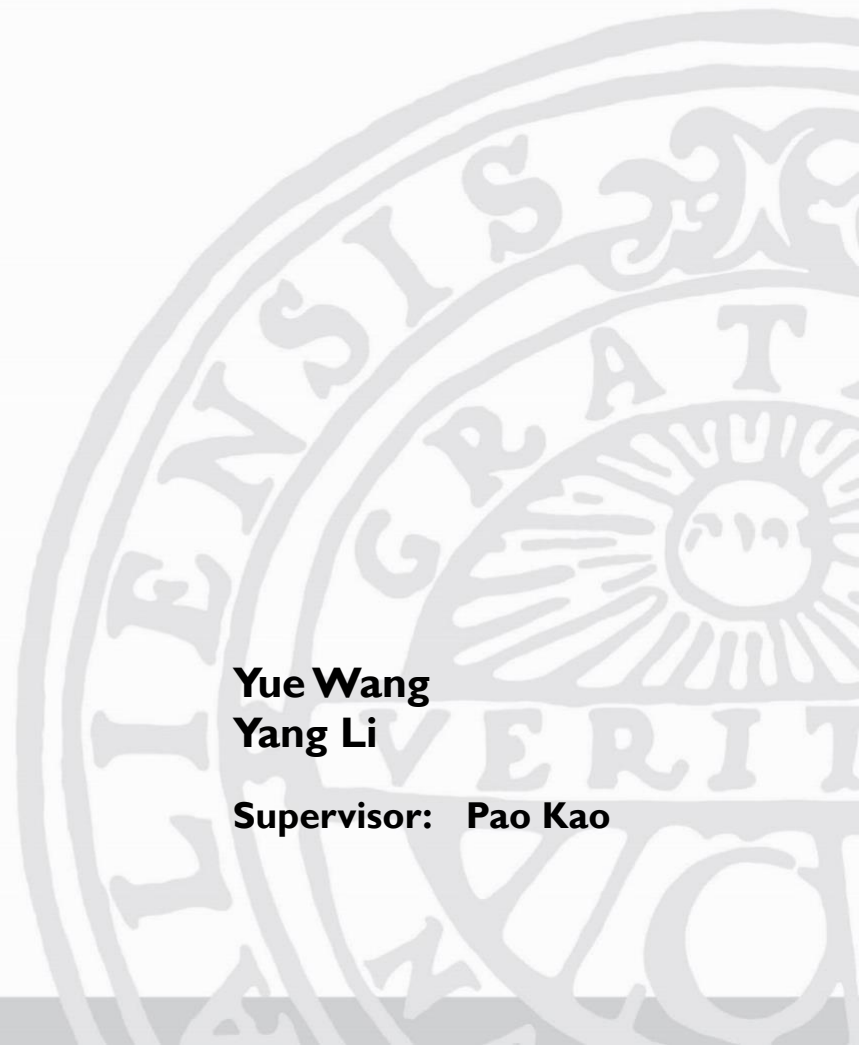
- A Qualitative Study on Chinese Consumer Behavior in Consuming Music and Its Merchandise

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Abstract

In the past few decades people's attitude towards music consumption has tremendously changed in China. With the constantly rising market and huge potential space, it is necessary to study the consumer behavior and explore factors that decide people's willingness to pay in music consumption. Therefore, the purpose of this thesis is to investigate: 1) What factors may influence the Chinese consumer behavior on music and its merchandise; 2) What factors may influence the "willingness to pay" of Chinese consumer in music consumption; 3) The similarities and differences between the consumption of music product and musical merchandise in China.

The authors select the qualitative method and set up two focus groups, music product group and music merchandise group, in this study. Finally, they found five dimensions (musical preference & identity, culture of music, musical loyalty & satisfaction, Chinese music consumption, willingness to pay) will interaction with each other and influence Chinese consumer behavior on music product and its merchandise.

Key words: Musical consumer identity, Music consumer preference; Music Culture; Music consumption; Willingness to pay; Chinese music consumer; Music merchandise

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1 Introduction

1.1 Music consumption in China

1.1.1 Copyright Market

According to the 2017 China Music Industry Development Report (Scbaogao, 2017), the total income of the China Music Copyright Association reached 184 million with an increase of 8.2% compared to the last year, showing a rapid growth in the development trend. This means that while there are still more abuses on the market, there is an indisputable fact that copyright issues are becoming more and more important and valued, and that the value of copyright has become more and more reflected in the market and management, this has also been reflected in the Music Association's copyright revenue with the 18.06% growth compared to last year (Scbaogao, 2017).

But this growth has been largely concentrated in the new media, while performance rights, reproduction rights and overseas earnings are falling. The new media mainly benefited from digital music, which showed that the development of digital music is relatively faster with more and more licensing needs (Koster, 2007). In this case, it shows that when people have online music consumption, the behavior of buying authentic music is much more frequent than the past few years. People are more and more copyright conscious when they consume music. But in such a context, what factors affect the growth of online music consumption is worth probing into the question.

1.1.2 Music Consumption

According to the data analysis of Global Digital Music Industry (Chinabgao, 2016), in the year of 2016, China's total value of music consumption per capita was only 0.15 dollars, which is 0.7% of Norway and Japan, and 0.91% of the United States. It is acknowledged that China's online music user base is very large, but it is also a truth that internet users scale and music consumption is far from proportional. For example, Mulligan (2017) mentioned that Chinese streaming media users are already the world's second largest, but paid income only ranked 13th.

However, the vast user is out there, so how to stimulate their music consumption needs? Is there any other way besides the digital album? From the current situation of Chinese market, although the number of digital album consumption is expanding, the music market space is still limited. No matter digital albums or fans economy, the market is still confined to a relatively traditional consumption scenario.

Furthermore, the thing that internet companies is doing right now is to take the traditional music industry's business model and use the network effect to solve problems in traditional industries, but it's hard to break the barriers to create new music consumption scenarios, which may be the task that online digital music industry needs to do if they want to grow rapidly in the future.

1.2 Chinese consumer behavior in music consumption

About the Chinese music consumption behavior, Nielsen Company (2016) has already published a report earlier, which shows that music plays a significant role in Chinese life. More than 977 million Chinese listen to music every week, accounting for 72% of the total population, and Chinese music consumption is expected to reach 56 trillion dollars over the next 10 years. Inside this group, 83% of the rich people who earn more than 33,000 U.S. dollars per year listen to music every week, and the top income group spends about 139 dollars a year on music consumption (about 900 yuan). The Boston consulting firm (BCG, 2014) predicted that China's rich class will double their spending over the next 5 years.
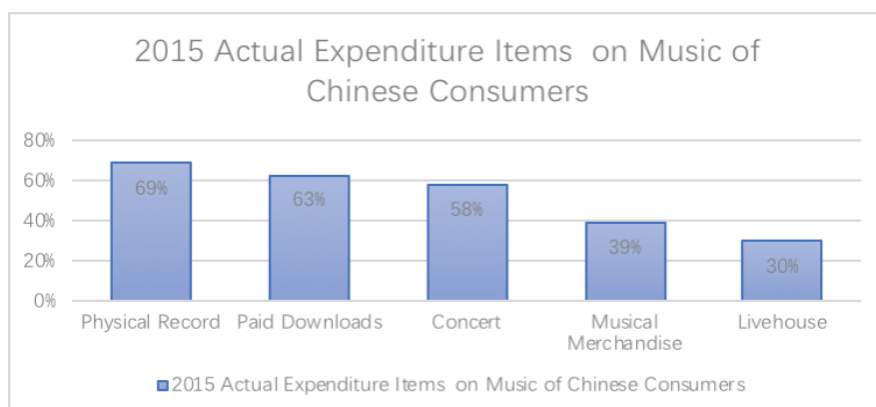

Figure 1: 2015 Actual Expenditure Items on Music of Chinese Consumers

There is, however, relatively little research on consumer behavior on music industry in China. Among the few studies, Huang (2012) shows the consumption choice of Chinese

music consumers in the year 2015 can be categorized in five categories (*Figure 1*).

As can be seen from the data, the physical record is still an important option for consumers, and the high percentage of paid downloads is also an illustration of the fact that since 2015, the major music platforms have been promoting the consumption of pay-music models, which stimulated the consumer behavior of music consumptions.

In addition to the traditional album, the range of music consumption has gradually expanded. Concerts and music merchandise have become more accepted fashion of music consumption because of the flourishing of the streaming media of digital music. According to the statistics of licensing Industry Merchandisers' Association (LIMA, 2017), the total sales of music merchandise amounted to $3.1 billion in China, increasing 10% compared with the previous year, and the total sales of music merchandise were three times higher than the previous two years. These data and reports have showed that in the current music consumption environment, Chinese consumers ' choices and preferences become more and more diverse, and not rigidly adhere to the traditional way of listening to music.

1.3 Purpose and research question

In the face of the relatively complex consumer psychology of Chinese consumers and the impact of the aforementioned "reluctance to pay" phenomenon, the incentive factors of Chinese consumer behavior for music and its merchandise are uncertain. Hence, in terms of the previous elaboration, the aim of this study is exploring:

1)What factors influence the Chinese consumer behavior on music and its merchandise?

2)What factors may influence their "willingness to pay" in music consumption?

3)What are the similarities and differences between the consumption of music product and musical merchandise in China?

2 Theoretical Framework

In this chapter, the author will discuss the literature on 5 factors in Chinese music consumption (*Figure 2*), which is the theory of music preference and identity, culture of music, music consumption, music loyalty and satisfaction, and voluntary payment. This model was inspired by the nature of consumer behavior in music consumption and what the predecessors had researched on. The five factors have tapped into consumers' attitudes and attributes towards music consumption in different ways. For example, the music identity and preference, music loyalty and satisfaction have mainly focused on subjective aspects to explore the impact of preference differences on consumer music from the individual's point of view. However, for the other three, is to focus on external factors such as the formation of culture, the status of music consumption and the relationship between voluntary payment and consumer behavior and so on.
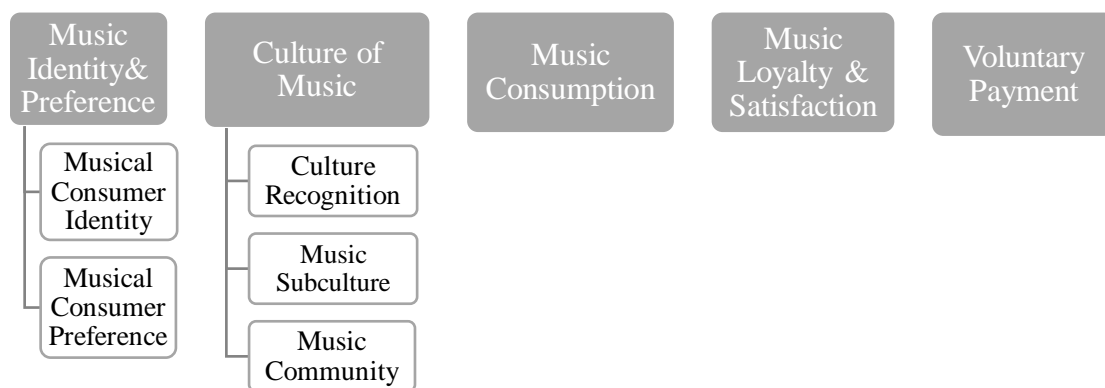
Figure 2 Theoretical Framework

2.1 Musical Consumer Identity & Preference

2.1.1 Musical Consumer Identity

Reed (2012:310) have elaborated that "identity can be defined as any category label with which a consumer self-associates that is amenable to a clear picture of what a person in that category looks like, thinks, feels and does". Different consumers have different preferences for different musical genres, and they identify themselves with the different personalities in which these musical genres mirror. Therefore, a series of demographic variables such as age, gender, ethnicity and social class are generally involved in musical consumer identity. According to the theory of social constructionist, everyone has many identities, not a single core identity (Hargreaves et al., 2002). Each

identity is created in interaction with others, so identities are continuously evolving. Contrary to the multiplicity and the changes of identities, musical consumers can convince others and themselves of the unshifting and core identity by communicating their identities through autobiographical narratives (Abolhasani et al., 2017).

Music has a memory-triggering element that stimulates people to recall events of the past. Therefore, in musical consumer identity, indexicality is defined as "the extent to which music arouse emotional memory" (MacInnis & Park, 1991:162), which links consumers to the emotional experiences of the past. As the atmosphere of a piece of music is related to the episode that the consumer experienced before, the music listeners can find resonance in this music. When emotion is aroused, the consumer's recognition of the song is much higher, and the willingness to pay for it may also increase. It's extremely difficult for the listener to dislodge one piece of music when it infiltrates consumers' mind and repeat itself. This involuntary cognitive behavior is called 'brainworms' or 'sticky music' (Sakes, 2011). The deeper the memory of one melody in consumers' mind, the more positive impact on their consumption attitude (Abolhasani, et al., 2017).

2.1.2 Musical Consumer Preference

Musical preference can be formed with a latent structure which is associated with various psychological characteristics, and the dimensions of music preference could be divided in terms of music-genres differences (Jeong & Lee, 2010). Musical preferences are related to personality, values and cognitive abilities (Delsing et al., 2008; Rentfrow & Gosling, 2003, 2006; Zweigenhaft, 2008). For instance, some classical, opera and jazz are sophisticated music styles which are positively associated with openness, imagination, liberal values and verbal ability. Some intense music styles such as heavy metal and punk are positively linked to sensation seeking and impulsivity. Social connotations which is associated with music can also work on musical preferences (Tarrant et al., 2002), as people are easily attracted by the musical styles with social characteristics that reflect their identities. Among adolescents, musical preferences of particular styles could be evidently influenced by peers which can reinforce group affiliation (Tarrant et al., 2006; Boer et al., 2011; Tarrant et al., 2002).

There is a closed relationship between musical preference and age in adulthood.

Bonneville-Roussy et al. (2013) find that different ages have distinct trends of musical preference. The young prefer to Contemporary and Intense music such as hip-hop and rock, while with the age increasing, the majority tend to consume Sophisticated and Unpretentious music which is familiar as classical and country music. Base on a large sample of individuals aged 18 to 75 years for over two decades, Harrison and Ryan (2010) reconfirm the musical taste changes from intense genres (e.g. Rock) to classical music genres with aging. In addition to the quantitative research, some other qualitative studies also point out that musical preference are not fixed from early adulthood, it could be changed and influenced by intrinsic determinants (the musical properties as perceived by individuals) and extrinsic determinants from social surroundings (Greasley & Lamont, 2006; Greasley, 2008; Greasley et al., 2013.; Bonneville-Roussy et al.,2017).

2.2 Culture of Music

2.2.1 Culture Recognition

Arnould and Thompson (2005) mentioned the concept 'marketplace' in his study, which means consumers are 'culture producers' and creating distinct social worlds through pursuit of common interests, shares values and mutual cultural recognition. As a combination of social properties and lived culture with distinct factors and significant life ways, this kind of consumer culture often create brand awareness and brand associations (Arnould & Thompson, 2005). The critical of music is mainly because it can "captivate audiences, provide cathartic and embodied experiences, and ground identities and communities, but also introduce us to rich exchanges between peoples while some-how both reifying and subverting power structures" (Bradshaw & Shankar, 2008:225). On the other hand, according to Ulusoy (2016), as one kind of 'marketplace', the culture of music can be seen as a symbolic product with socially constructed meanings that are perceived to be expressive and paradoxical, also through which cultural sources and meanings dynamically circulate, has been so recognized.

2.2.2 Music Subculture

Ulusoy (2016) once also conducted a research focuses on subcultures that are shaped by eclectic constellations of style, ideology, and discourse in the context of music

perceived to be antithetical to mainstream music and mass culture. The findings of this study have shown that subcultural in music consumption can be influenced by many factors such as radical self-expression, therapeutic praxis, and controlled chaos, etc. This study explored a way in which subculture is produced, and illustrated the subculture characteristics brought by different music backgrounds. Music consumers have also played an important part in the formation of certain sub-culture community. For example, music symbolizes meaning (Larsen et al., 2010) and cultural resources through which subjectivities are molded as they are contested, negotiated and reconfigured in an ongoing process of enactment (Ulusoy & Fuat Fırat, 2011). What's more, in the process of subculture formation, consumers are always regarded as the producers of cultural sources, meanings and artifacts. (Holt, 2002). This notion is also in line with the CCT school of thought that examines the production aspect of consumption (see Arnould & Thomson, 2005) by exploring the cultural practices of consumers in their music consumption and production.

2.2.3 Musical Community

About the emergence of different music culture background and how music culture shapes the corresponding subculture groups and brand communities in the consumer groups, some scholars have made several different points but the emphasis are all concentrated on the concept of consuming music, which means people's attitudes and behaviors in music consumption can shape and leverage the formation of music culture as well as subculture community. Brand communities have commercial and mass-communication atmosphere which have affected their characters and structures and determined the specificities and impacts on brand. Muniz and O' Guinn (2001) have pointed out that the brand community represents a form of interpersonal relationship in a consumer environment which is built upon a certain product or service. They are defined as a brand-centric business community, rather than casual contact with business space and events. Engagement in a music community is not just listening to music, or consuming music, but mutually participating in a culture best characterized by connectivity, interactivity, and community in both physical and digital spaces (Ray,

2017).

Generally speaking, among all the literatures of music culture, the authors found that the "marketplace" is the first to come out of the business environment. As a kind of market culture, music consumption culture has been dominated by people's conception of consuming music and shaped by consumers' preference. In this case, the market has produced a number of consumer groups and different subculture groups are produced because of the multiple roles of various social and cultural factors.

2.3 Music Consumption

Conveniently searching for music is crucial for online music platforms which should minimize their download times. It also showed that the increasing transaction costs wouldn't have an impact on the potential purchase willingness of digital music online. Hence, online music platforms should set up a pricing strategy to draw attention to more potential consumers (Jeong & Lee, J., 2010). Lowering price sometimes can benefit online music platforms, therefore, the combination of increasing transaction costs and lowering prices might reduce the amount of people engaged in illegal digital music. Regner (2014) showed that a combination of fairness, reciprocal concerns, self-image concerns, norm conformity and strategic concerns drives behavior in this context settings. Gamble & Gilmore (2012) aimed to address the emerging post-millennium trends in co-creational marketing, in the context of how these trends apply to the recorded and live sectors of the music industry. Consideration of marketing as a broadened concept to include societal processes has implications not only for the marketing concept itself, but also for the roles of the parties implicitly involved in the marketing process.

2.4 Musical Loyalty and Satisfaction

There are a lot of definitions of loyalty and satisfaction in the related literatures. Gremler and Brown (1999) has emphasized that customer loyalty is the formation of trust, commitment, emotional maintenance and dependence of the customer on the certain enterprise and brand. The process is based on long-term reciprocity, which means the customers will repeatedly buy or use some certain products and services in the long time. Time after time, loyal customers will be more and more and they will be

more willing to try new products or buy more high-end products. The brand-related purchase will also be accepted more frequently and at the same time. What's more, customers will be happy to recommend new users and disseminate information conducive to enterprise and brand, and become low sensitivity to price, which means they are willing to pay high prices for high-quality. Therefore, the customer loyalty refers to a high degree level of trust and loyalty about the customers show dependence and recognition to the enterprise product or the service (Oliver, 1999). Usually it's about people are insisting on the long-term purchase and use of some certain products or services and displaying in the ideological and emotional way. It is also the customer's products in the long-term competition in the performance of the comprehensive evaluation of the advantages (Baek & Yoo ,2018).

On the other hand, customer satisfaction is a weaker existence compared to loyalty. Kotler (2017) has pointed out that customer satisfaction refers to the feeling of pleasure or disappointment that a person has formed by comparing the perceived effects of a product with his expectations. Assael (1998) also thinks when the actual consumption of goods has achieved consumer expectations, it leads to satisfaction, otherwise, it leads to customer disappointment.

Therefore, from the above definitions, it can be assumed that the satisfaction level is the difference function between the perceptual effect and the expected value. If the effect is less than expected, the customer is dissatisfied; If the perceived effect matches the expectation, the customer is satisfied; If the perceived effect exceeds expectations, the customer will be highly satisfied, happy or delighted. Customer satisfaction is a quantitative description of customer attitude assessment. In this case, it can be defined satisfaction briefly as the degree to which the customer's actual experience of the enterprise's products and services is compared with the expected value (Chan & Goldthorpe). Customer loyalty will eventually be formed if customer satisfaction is constantly accumulating and stacking.

In terms of music consumption, loyalty and satisfaction have been expanded in some other ways. First, Chan and Goldthorpe (2007) have mentioned that music loyalty and satisfaction can shape a particular brand of loyalty. Music industry is more fan-oriented and the word "customer" is rarely used. Successful music companies tend to have their

own enthusiasts, and strive to shape their fans since the music fan effect has a huge impact on attitudes and purchasing behavior, and has an impact on long-term sales and profit levels. This attitude and behavior breaks down the traditional measure of customer loyalty, which redefine the total mania and the ultimate loyalty a company hopes to receive from its customers, in terms of goal, quantity and extent (Blackwell & Stephan, 2004).

2.5 Voluntary Payment

Kim et al. (2009) indicate that the fairness concerns motivate consumers to pay voluntarily with altruism is the reciprocity. Buyers will pay voluntarily without the consideration of reciprocity and reputation when they repeatedly interact with sellers (Schmidt et al., 2015). The phenomenon that consumers pay voluntarily for music can be associated with a high level of social preferences, intrinsically, it aims at achieving a sequential reciprocity equilibrium in music consumption. As the resource of social preferences, reciprocity is founded on the hidden informed buying decision behind the free pre-purchase access. Plenty of unknown music could be recognized via this access, although the self-interested consumers are willing to pay voluntarily the minimum. In addition to reciprocity, warm glow and guilty are also underlying motivation for social preferences which could affect the payment behavior in music consumption. These three motives well explained the consumer behavior of maximizing their utility (Regner. & Barria, 2009).

Gneezy et al. (2012) demonstrate that self-image concerns are positively related to the determinant of voluntary payment, on the contrary, social-image concerns will trigger negative reaction. Jang and Chu (2012) conclude that consumers will pay voluntarily by two principal underlying mechanisms, self-image motivation and norm conformity. Johnson and Cui (2013) point out the external reference price will not make consumers desire to pay more when they are less sensitive to price or having a higher reference price inside. Mak et al. (2013) confirm that consumers pay voluntarily with strategic considerations. There is no proof that fairness concerns can drive consumers pay voluntarily (Regner, 2014).

3 Research Method

3.1 Research Design

3.1.1 Qualitative Study

There is little research with in-depth insight on how Chinese music consumer behave and what influence them do so. This study aims to understand what factors may influence the consumption behavior of Chinese consumers in terms the subculture in music, musical identity, musical preference, musical consumption and voluntary payment for music. Qualitative method is appropriate to answer our research question and as it enable us to focus on exploring Chinese consumer behavior (Somekh & Lewin, 2005). Qualitative research tends to concentrate on words rather than numbers, and in an ontological position described as constructionist, it implies that "social properties are outcomes of the interactions between individuals, rather than phenomena 'out there' and separate from those involved in its construction" (Bryman, 2015:386). Since the authors are interested in the nature and in-depth insight of individuals in Chinese music consumption market, an exploratory qualitative study will be designed in this research.

3.1.2 Focus Group

The hidden factors behind the Chinese consumers' musical preference and consumption behavior are ambiguous here. Then the qualitative research method of focus group is under consideration. Focus group is an effective means of exploratory data collection, and it can offer an approach for researchers to explore in-depth on a topic about which little is known (Stewart & Shamdasani, 1990), and it aims at understanding rather than inferring, determining rather than generalizing the range, providing insight into how people perceived a situation rather than making statements about the population (Kreuger, 1994). Since this research is in the scope of social science, focus group has been well rehearsed in this field, and it can stimulate respondents to discuss underlying issues via a relatively informal atmosphere (Bloor et al., 2001).

Distinguishing from other method in relation to face-to-face contact between researchers and participants, focus group can generate far more data for research analysis (Parker & Tritter, 2006). The group norms can be accessed, and the insight into the formation of views which cannot be so readily achieved via individual interviews can be offered in the focus group (Somekh & Lewin, 2005).

3.2 The Formation of Focus Groups

If the researchers intended to investigate the Chinese consumer's perception of music consumption, then the interview object should be Chinese consumers. Focus group was held in Sweden, and the researchers have selected the respondents from Chinese students in Sweden. If the survey was held in China, it would not make too much difference on the investigation since the research have targeted on Chinese consumers at the first place.

Contrast to structured interview, these focus groups tend to be much less structured and it aims at encouraging participants to raise any aspect of the topic considered important (Shaw & Clarke, 1999). Depending on the reality of Chinese music consumption market, the market segmentation can be roughly divided into music product and musical merchandise. Hence, there are two focus groups, music product group and musical merchandise group, are designed here. In each group, there are 6 Chinese participants, and 2 authors of this thesis are the hosts. Participants should avoid close relationships with relatives and colleagues in this study, because it could affect discussions and research results. Also, the researchers selected different backgrounds, ages and genders to guarantee the group diversity. All of them are used to listening to the music. The setup of two hosts aim at enhancing the validity of the research method.

A protocol of questions was designed here which developed in accordance with established guidelines (Krueger, 1988). All the inspirations of the designed questions come from the literature reviews and social reality. The order of the problems is from easy to difficult, and the questions should cover consumer behaviors first then comes the attitudes. After each focus group interview, the authors have recorded the contents immediately. During the process, all the primary data have been transcript in case of missing the important information.

Sometimes the loose structure may generate disadvantages, for instance, the focus group process does not expedite the generation of a list of attributes (Claxton et al., 1980), and the unstructured formation may make participants not realize completion and accomplishment, thus causing their dissatisfaction (Van de Ven & Delbecq, 1974). Therefore, the authors have conducted a pilot to test whether there are underlying issues in question design and the entire process of focus group, and modify the disadvantages

before the formal ones.

3.3 Conducting Focus Groups

Because the authors found there are two main consumption markets in Chinese music industry, the music product and its merchandise, the ideas of two focus groups appear. The music can be regard as consumer goods of spirit, while the music merchandise is consumer goods of object. Therefore, the Chinese consumer behavior in music and music merchandise may have some similarities and differences. In terms of this reason, the authors have designed some shared questions for both groups and some different questions for each group, in order to have a deep understanding in these two consumer groups. The *Figure 3* is the framework of the research design.
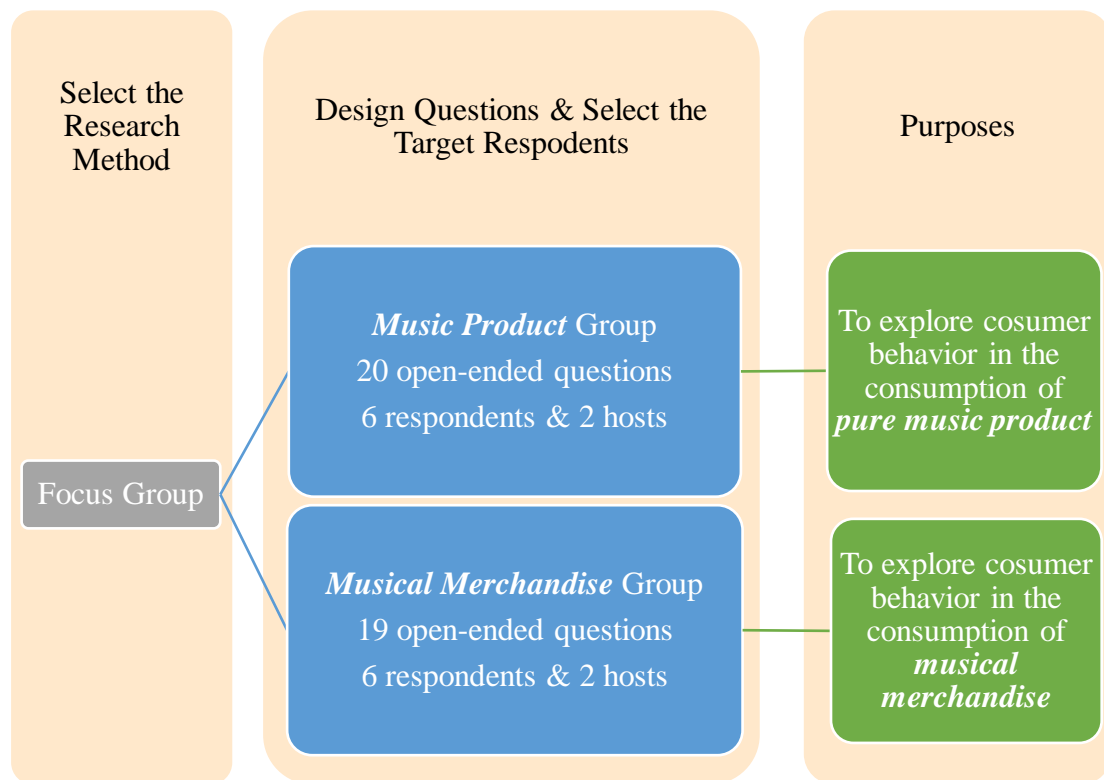
Figure 3 Research Design Framework

Table 1 is the respondents' personal information. The first music product group has lasted 120 minutes with 20 semi-structured questions, and the second musical merchandise group has lasted 100 munities with 19 semi-structured question. Both focus groups were conducted by two researchers in Uppsala. Generally, the hosts simply write down what one respondent says in an individual interview. While in a focus group, the difficulty is to "write down not exactly what people say but also who

says it" (Bryman, 2015:505). To solve this problem, the authors recorded the entire process two focus groups after getting the permission of all the participants. It offers multiple opportunities for researchers to record and transcript the detailed information which might be skipped in the first recording.

Music Product Group				Music Merchandise Group			
Surname	*Gender*	*Age*	*Profession*	*Surname*	*Gender*	*Age*	*Profession*
Yuan	Female	27	Trading	Wu	Male	24	Student
Lu	Female	40	Finance	Shen	Female	23	Student
Yan	Male	29	IT	Zhang	Female	30	Pharmacy
Chen	Male	30	Transport	Zhou	Female	28	Music PD
Mu	Female	36	Manufacture	Gong	Male	34	Appliances
Lin	Male	24	Student	Wang	Female	33	Manufacture

Table 1 Respondents' Personal Information

Sometimes it makes transcription more difficult when respondents talk over each other (Bryman, 2015). Therefore, before each focus group, the hosts reminded all the participants to speak one by one. Even if they want to argue others' opinions, keep waiting for the previous one to finish his or her talk. The researchers should also focus on whether certain individuals play as opinion leaders or dominate the discussion, make sure to offer respondents relatively equal opportunities to speak. Rather than elicit the group's answer, the objective of focus group is stimulating discussion and understanding the meanings or norms which underlie the group answer. Therefore, the indicators of focus group seek group interaction rather than answers (Bloor et al., 2001).

3.4 Data Analysis

The nature of the data from the focus group depends on the participants in specific time and context (Parker & Tritter, 2006). Unlike in-depth interview, it is impossible to clarify or collect more data when focus group has finished, such as a respondent's reaction within specific emotion (Frankland & Bloor, 1999). Therefore, the hosts should particularly pay more attentions to respondents' emotion and expression, and recoding

what they say at that context. During the coding process of focus group, it is easy to find some talks are colloquial and the information from data is often incomplete and interrupted (Kitzinger, 1994b). Therefore, the researchers should complement the missing information by analyzing and connecting the context clues.

Focus group normally generate both individual and group opinions, so it's not easy to disentangle one from another (Hyden & Bulow, 2003). At individual levels, people are easy to be influenced by others and switch their initial viewpoint at the end of the focus group, so the researchers should analysis the incentives. At collective levels, the majority of the participants' standpoints could be roughly regarded as the group's conclusion (Parker & Tritter, 2006). As a normality, focus group cannot generate consensus, different proportions of the group tend to support the different views (Edwards, 1997), the researchers can contrastively summarize and analysis why different views occur in one topic.

After coding and analysis, the framework of the findings contains five basic dimensions, musical identity and preference, culture of music, loyalty and satisfaction, music consumption and willingness to pay. Each of the dimensions reflect different perspectives and impact factors for Chinese consumer behavior in music industry. The authors also analyze whether there are relationships between each dimension. If some of them can influence each other, it means multiple factors should be aware that it may shift consumers' consumption attitude when the researchers design the marketing plans.

3.5 Reliability and Validity

Guba and Lincoln (1994) propose that in order to detect the quality and feasibility of the research, it is necessary to establish and evaluate the quality control methods of the research. Therefore, in this research, reliability and validity have been discussed and guaranteed since those are the crucial criteria of the quality control of the qualitative study. (Mason ,1996) The authors have carried out focus group study in this research, provides a way to get feedback and information from a group of relevant participants. As a typical qualitative research study, focus groups can be used in many types of research and can provide useful information. It is important to conduct them in right ways that make them reliable and valid.

3.5.1 Reliability

Reliability is the extent to which a measure (such as a focus group) is accurate and replicable. With focus groups, this could concern whether another focus group, would give similar answers. Focus groups often have problems with reliability, in this case the authors have set up relatively specific and progressive questions and highly moderate host to lessen the uncontrollable and uncertain factors.

In this research the following three prominent factors have been involved when considering whether a measure is reliable.

1) External reliability, by which they mean the degree to which a study can be replicated. The focus group in music consumption study can be replicated since this topic is neither too obscure nor difficult to follow. This is a more general topic, especially among young people. The process of conducting this research is also traceable, it doesn't need a special political, geographic or even humane environment, and all process settings are also based on the general focus group investigation procedure.

2) Internal reliability. According to the research, the key issue is the indicators which make up the scale or index are consistent. (Mason,1996) In other words, when there is more than one observer, the researchers and the participants can keep in line with what they hear and see. During the whole research, no matter participants or moderators, there is no doubt about the research process, all of them actively cooperated and smoothly completed the entire investigation process. Even if there is a third party to witness the case, the entire research process is also trustworthy and recognized.

3) Inter-observer consistency. There is only one 'observer' involved in the research, the moderator, as well as the author. This means when a great deal of subjective judgement is involved in such activities as the recording of observations or the translation of data into categories, there won't be a lack of consistency in the decisions. (LeCompte and Goetz,1982) The observer (i.e. the author) has a subjective and single view of the whole investigation and won't make a conflict of opinion.

3.5.2 Validity

Validity refers to the issue of whether or not an indicator (or set of indicators) that is devised to gauge a concept really measures that concept. (LeCompte and Goetz,1982) In this research, there are several ways of establishing validity explored including

internal validity and external validity, etc. Validity is also the extent to which a measure measures what it purports to measure. For focus groups, this could mean whether it is reasonably certain that people are talking about what you think they are talking about. Focus groups tend to be strong on validity.

1) Internal validity, this mainly check of there is a close and smooth match between researchers' observations and the theoretical ideas they develop. LeCompte and Goetz(1982) argue that internal validity is the main point and focus of qualitative research, particularly ethnographic research, because of participation in the life of social groups, researchers can ensure consistency between conceptual theory and observational results. In this research, all the questions are set to ensure a high degree of consistency between theoretical concepts and observation. In fact, the dimensions of the interview questions in the focus group are set by the points extracted from the literature review. This ensures that the focus group is relevant to the subject, and the research is developed in the achievements of predecessors.

2) External validity, which refers to how much of the survey results can be replicated in society. LeCompte and Goetz (1982) argued that, unlike internal validity, external validity often exists in qualitative studies rather than quantitative studies, since qualitative studies usually focus on small-scale surveys and small samples. In this case, the research and measure is stable over time since focus group is regarded as more controllable compared to quantitative data collection with the relevance of topic, which means it has a certain social extension. The authors have tried to make sure the participants are all more or less involved in music consumptions and the participants have a wide background and ages, so that it is confident that the results relating to focus group for a sample of respondents do not fluctuate or out of range.

Overall, analysis of validity and reliability is the prerequisite for the smooth development of the research, and the author also covers these principles as much as possible in the process of designing focus group. The research has followed the theoretical basis of qualitative research, and there is also some adjustment based on the actual situation in accordance with the sublimation.

3.6 Ethical Consideration

Bryman (2016) has brought up the considerations towards ethical problems which

might occurred in a scientific research, and he pointed out it is essential to take the ethical factors into considerations when carrying on a research. On the other hand, Diener and Crandall (1978) had broken down the principals into four areas as a) whether there is harm to participants; b) whether there is a lack of informed consent; c) whether there is an invasion of privacy; d) whether deception is involved. These have emphasized the basic issues to be aware of when conducting a focus group. Therefore, when doing the focus group, the authors have summed up the following points on the basis of the predecessors to highlight and avoid ethical problems.

1) *Whether the setting of the focus group questions will affect the privacy of the participants?* According to this, when designing survey questions, the authors have tried to meet and tap close into the theme and avoided all the topics unrelated to music consumption and personal privacy topics. Moderators also tries to avoid privacy disclosures while hosting focus group and whenever a personal problem arose, they tried to steer the conversation to the core subject as much as possible.

2) *Whether there are some disharmonious factors among the participants can lead to conflict.* In this case, when designing focus group, the authors have taken into account conflict issues in advance. For example, they didn't choose two people who are in conflict to be interviewed, or try to make the respondents more approachable and gentle in case some unexpected situation occurred. However, despite this, in the process of the focus group, there were still two people who were almost in conflict with each other. Fortunately, the moderators have other things diverted the attention and to be able to run focus group smoothly.

3) *The entire process should be guided by the principles of truth and there should be no deception.* In this case, when designing and carrying on the whole focus group, the authors carried out pivot review tests for each respondent and have made sure every interviewee is totally involved. On the other hand, for the focus group process, the moderators have set the relevant and normal questions which do not deviate from the facts or led the research far away from core topic.

4) *Whether the whole investigation process has the infringement behavior, or has affected the predecessor's research result.* In this case, the authors have studied the related literatures and ancestors research before the research on music consumption and

make sure this study is inclusive and worth going deeper into. Furthermore, on the basis of ensuring the results of previous studies, the authors have made a deep inquiry into the influence dimension of music consumption, which not only ensure the ethical consideration but also enhance the innovation part.

In general, this study has taken into account some of the ethical consideration aspects as much as possible in the focus group design process. However, when some uncontrollable situations appear, the authors have also try to avoid the problems with subjective initiative according the basic principle of the investigation.

4 Findings

4.1 Chinese Consumers' Musical Identity and Preference

Our findings show if the informants prefer the music which is not the mainstream, they also tend to use the music platform which is not mainstream. They identify themselves with the attribute of highlighting their individuality. They are immersed in the uniqueness of personality that doesn't follow the majority.

People who like strong rhythm are normally outgoing. Such people tend to accept diverse styles of music. On the contrary, people who prefer quiet tend to like fixed music style, it's hard for them to accept other styles of music especially the strong rhythm. For instance, Wu is a talkative guy who is keen on EDM, he also listen to hip-hop, rock and other pop music. Different from Wu, Chen is a quiet man, he dislikes strong rhythm and simply prefer lyrical music.

Most of the respondents' preferences of music genres tend to transform with the changes of age and psychology. Different music genres represent different personalities, since their perceptions of the world and things changes, their identities with music genres may change. For instance, Gong was fond of Rock when he was a rebellious teenager, while with aging and psychological maturity, he tends to taste music with richness connotation.

It seems that people's musical preference might be affected by their life experiences. Such as Lu said, when she was young, she preferred smoothing music, while she tended to enjoy hip-hop, which she thought the lyric is quite realistic, after she was employed with a stressful job. She found that hip-hop can help her give vent to her anger and made herself quickly get peaceful.

Most informants prefer artists with multi-talent, for instance, whether they are singer-songwriter, whether they can play musical instrument or whether they have high minded in their music.

4.2 Culture's Influence on Music Selection

Some respondents' music preferences are influenced by the music culture they have been exposed to in childhood, such as the music instruments they have learned. The

respondents who were affected by positive and negative effects, were half-and-half. Most of the respondents do not deem that consuming music is a kind of consuming culture, there is no relationship between them.

> *"I have been learning piano for some time when I was young, which means I will be influenced by some classic music when choosing a song. I felt so reluctant to listen to this kind of music and I wound rather to be a vague person sometime."* *(Wang, 2018)*

> *"Really? I have been learning piano for quite a long time and I felt like I still prefer to listen to indoor music which is more classic."* *(Zhou, 2018)*

The informants' music selection are also affected by subculture. Such as Yuan, she is addicted to classical Chinese poetry, so she'd like to collect the music with this style of LRC. This kind of informants tend to set up an association between specific music genre and that subculture, then looking for some music or artists which could align with this particular culture connotation.

> *"Listening to anime songs has been one habit since my high school period. I'd like to buy anime magazine at that time, each one has a piece of CD inside. It contained nearly most of the popular anime songs over the past two months."* *(Yan, 2018)*

Most of the respondents do not deem that consuming music is a kind of consuming culture, there is no relationship between them. For instance, Lu prefer to listen to Korean hip-hop, but she has no interest in Korean culture. Because she felt 'consuming culture' is a sentimental term that music consumption should be sheer without any other excuse. In her mind, there are no relationship between consuming music and consuming culture.

Comments from users with different cultural backgrounds may increase respondents' browsing and usage time, at the same time improving respondents' repeated use because of their feeling of high interest and freshness.

> *"I used to browse the comments section of YouTube, because many foreigners commented on Chinese songs. He or she might not understand the lyrics but think the melody is good, which means there will be some interesting comments*

and I'm really interested in it." (Gong, 2018)

Everyone is influenced by social media a lot when choosing a song, such as, Facebook, Instagram, and other hot social network platforms. The push notifications and news from social media are easy to grab consumers' attention at all ages, because they have the curiosity on novelty. It is also very important to combine the social networks together with pure online music channels closely to make sure the convenience of copyright sharing.

> *"In fact, people should pay more attention to the music recommendation on social network such as Weibo, Douban and WeChat friend circles." (Wu, 2018)*

> *"I am also deeply affected by social media. For example, if the internet pushes a notification of one singer's news, the singer's song may suddenly recall in my mind, and then I'll go to QQ Music to looking for the singer's album." (Lu, 2018)*

In China, social media gradually affect the consumer behavior and form the trend of 'Be Fed'. The 'Be Fed' phenomenon means people's music preference are easy to be influenced by external cause such as push notification and subscription on social media. They are gradually losing part of the ability to actively searching for music, and shift to trust the recommendations of community on social media. The phenomenon offers heuristic train of thought for Chinese music platforms and publishers. They can set up ads campaign on mainstream social medias, this might enhance the propaganda of the platform or the new album.

4.3 Consumption in Music and Its Merchandise

Most respondents generally choose genuine music because of its guaranteed tone quality, such as YouTube, although it lacks some BGM function, the genuine MV has great tone quality and image texture which could make the consumers satisfied.

> *"The quality of genuine music is relatively high and it is more likely to see a movie on YouTube and the feel the scene of the song." (Zhang, 2018)*

If at home, some respondents choose to play music with computer when the BGM requirements are not that much necessary. Respondents feel that online playback is also very convenient, tone and picture synchronization could offer a special experience of the music. If staying outside, respondents prefer to play the music on mobile phone for

convenience. Therefore, for the majority, the convenience demand is more important than the tone quality is the context is limited.

For convenience, most people may download songs to their cellphones, while it is affected by the consumers' personal phone storage. For people without fixed music preference, they do not care whether it is convenient to enjoy music anytime and anywhere, that is, the timeliness of music demand is low.

From the consumption perspective of musical merchandise, respondents with lower demand intention tend to purchase from convenient online channels; while people with higher demand intention tend to buy from offline channel, because they want to see the items and compared the price-quality trade-off.

> *"I used to buy the merchandise of Lincoln Park, but I didn't want to buy their merchandise so much when I was in the concert. If I want to buy the merchandise of some music I usually use the most convenient way such as shopping on the line. "(Wu, 2018)*

> *"I have brought a lot of Big Bang's merchandise since I'm a huge fan. I feel like it is better to shopping offline since it is better to see the real things and compare."*
> *(Feng Zhang, 2018)*

Since respondents have different tastes for music, their demand for music merchandise are different. For instance, informants pay more attention to the content in rock music, the singers' images are not their concerns, so the relevant demand of musical merchandise are not strong. If consumers prefer the Korean idol group, who are attracted by their favorable images, its related merchandise could be hot sales.

4.4 Consumer Loyalty and Satisfaction

It seems that informants who has the fixed preference of singers or music styles, they have high willingness to buy licensed music. They aim at supporting their favorite composition and idols. They feel resonate with the singers and could identify themselves with the attributes of the given elements in the music. Those respondents have less price sensitivity, they acknowledge the value and the price of the music they consume with high loyalty and willingness to pay. For the respondents who do not have

fixed preference of singers or music styles, they have high price sensitivity and low loyalty in music consumption, therefore, normally they consume few musical merchandise.

> *"For me, I used to buy the licensed tapes in the past because compared to the pirated ones I felt more sense of pride and would definitely value the things I bought. So, I don't think it is expensive, it is just worth the price." (Gong, 2018)*

> *"I personally don't listen to music that much," she said. Whether to buy music periphery depends on if I'm a fan of some certain pop stars. Otherwise I won't buy it." (Zhou, 2018)*

All respondents feel convenience is a crucial factor when choosing a music platform. This kind of convenience contain the function of music push notification, LRC notification, substantial album, FLAC APE, clear song classification, few copyright limitations, more favorite singers' music. This convenience may affect consumers' consumption and their willingness brand loyalty on music platform.

> *"In fact, I have been using KuGou Music for a few years before, but I finally gave up because of its unpleasant experience. Its music classification of albums and the artists is so bad. Now I use QQ Music, it does a very good job at its classification of songwriters, albums, singers, styles and other related information, the navigator is quite clear. It's so convenient for me to searching for and download my favorite music." (Chen, 2018)*

4.5 Willingness to Pay of Chinese Consumers

Most of the respondents generally think that young women are more interested in impulsive spending on musical merchandise.

> *"My little sister is totally into buying the merchandise such as TFboys." (Shen, 2018)*

> *"This is also having something to do with the age. People who are younger are easier to buy these merchandises." (Zhang, 2018)*

Most respondents deem that consuming pure music product is more worthwhile than consuming musical merchandise, and the reason is musical merchandise generally do

not have a good price-quality trade-off. If the price-quality is trade-off, their willingness to pay might be higher.

> *"Because all these merchandises we talked about have less reasonable price. Sometimes they are just cheap and simple T-shirts which have the names of the pop stars and I don't think it is worthy to waste so much money on these names. I'm usually reasonable on spending money." (Wu, 2018)*

Informants is very concerned about the design of music platform, for instance, a clear navigator and album categories, less advertising. The design can tell on which platform they are willing to pay.

The moral reputation of a singer is also a crucial factor which influence informants' purchase behavior in Chinese music market. Especially for female informants, if the singer has dirty record, most of the female respondents express they won't pay for them and even recommend their friends no longer listen to their music.

5 Discussions

5.1 Willingness to Pay on Music Product

5.1.1 Factors from Auditory and Visual Perception

Preference of auditory perception seems to be one of the main factors that interact on consumer payment behavior. Whether the melody can sympathize with the listeners induce the possibility of purchase. Most of the artists will post their demo before they album releasing, then their agent platform will carry out pre-sales. It aims at testing whether the potential customers will identify themselves with the melody. If they do so, they might pay voluntarily without any persuade. Most consumers may endow one type of music with one property which is from their own cognition, and the definition of this music genre generally reflect their own personalities. For instance, one of the respondents Gong has mentioned that he was fond of rock when he was a rebellious teenager. It means he'd like to define rock with the property of 'rebellious'. Another respondent Wu think rock is cool which means the melody of rock has the property of 'cool' in his mind. As they deem the music to which they listen has the same properties with themselves, paying for music is equivalent to paying for themselves.

In addition to the auditory perception, visual perception can also impact on consumers' payment willingness, especially for people who are critical to literature. This kind of people not only concentrate on the melody, but also interested in tasting the LRC. For them, LRC endow the music new life, and this mix of artwork can evoke their life experience. Sometimes, they select the music not in terms of the music genres, but check the LRC at first sight. Therefore, if the lyric cannot make them satisfy, they won't generate purchase behavior. This phenomenon very well interprets why some of the Chinese consumers do not like to foreign songs, one of the reasons might be the obstacle of language comprehension.

5.1.2 Convenient Service Impacting on Consumption Loyalty

If consumers want to listen to music, they should use the formal music platform. Therefore, the music platforms turn to be the main channel to buy online music, and their service quality become the core competence which could influence consumers' choice and willingness to pay. In terms of the findings, consumers believe the convenience is a key factor when they choose a music platform. The definition of

convenience here contains the function of music push notification, LRC notification, substantial album, FLAC APE, clear song classification, few copyright limitations, more favorite singers' music. This phenomenon implies that, with the progress of digitalization in internet serves, Chinese consumer are willing to spend as less time as possible in searching for music. They' like to use easy navigator and anticipate more customized content which less spend their mental and physical strength. Therefore, whether the music platform is convenient determine consumers' loyalty and willingness to pay.

5.1.3 Price not Influencing Too Much in Pure Music Product

Compared with the CD age, consumers' price sensitivity in pure music product turns to be lower. The main reason is most of the music albums turn to be digital albums, and the marginal cost tend to be ignorable. Confronted with the Chinese music platforms' monthly package serve, consumer who pay less than 20RMB per month for one platform could download all the music during that time. It's quite cheaper than buying a CD, therefore, most of the consumer could afford it. Meanwhile, the channels to buy music become shorter, from offline store to online store, which increasing the speed and frequency of transaction.

5.2 Willingness to Pay on Music Merchandise

5.2.1 Identity with Idols Stimulating Voluntary Payment

It's easy to find that musical preference and identity influence the 'willingness to pay' of Chinese consumer the most. The gender, age, music genres and personality can reflect whether they can identify with the music and which styles of music they prefer (Delsing et al., 2008; Rentfrow & Gosling, 2003, 2006; Zweigenhaft, 2008).

For Chinese female consumers, their willingness to pay for musical merchandise are higher than the male. Because in addition to the quality of music, they are also easy to be influenced by the artists' reputation and moral behavior. Most of the merchandise in China are designed to represent the artists' image and personality. For people who are engaged in purchasing the music merchandise, they tend to identify themselves with their idols, and imagine they could get the same traits via this behavior (Tarrant et al., 2002). Compared with the female, Chinese male are more rational and concentrate on music itself. Meanwhile, they value more on a trade-off of price and quality. For them,

most time they select music for its melody or lyric, they seldom set up association with paying for the image product such as music merchandise.

The young are also the main force in music merchandise consumption market. They are full of passion and easy to be impulsive, these characteristics make them more likely become obsess to one idol in a short time, and then buying a lot of music merchandise to express their love and loyalty. With aging, consumer psychology is increasingly mature, the frequency of impulse may be reduced. Therefore, the purchasing intention of music merchandise for adulthood over 30 years old may be lower.

People who do not have fixed preference of singers tend to not buy music merchandise. Since there is no concept of idolatry in their mind, the music merchandise which simply represent idols' image cannot stimulate their desire.

5.2.2 Culture Not Influencing Music Merchandise Consumption

According to table 2, it can be found that the dimension of culture cannot influence 'willingness to pay' in music merchandise. According to the research in this study, most of the consumers may not connect consuming music with consuming culture. In their mind, they think the two conceptions are totally separate and couldn't set up an association between them. Different from pure music products which are influenced a lot by culture factors, it can imply that the Chinese music merchandise market do not perform well in endowing culture on product design. Most of the music merchandise still stay on consuming idols' image and lack of culture connotation. If the designers put more music culture elements into music merchandise, the consumption market of music merchandise could be expanded, and more other types of consumers can enter this market.

5.2.3 Price influencing the 'Willingness to Pay' on Music Merchandise

Different from the pure music product, according to the findings, Chinese consumers' price sensitivity on music merchandise are higher. Most of the consumptions on music merchandise are impulse buying. Two reasons can explain this phenomenon. One is the price of merchandise cannot match its value. As special material object, consumers not only take the spiritual satisfaction into consideration, but also mind its quality. However, most the merchandise' qualities are not very well, because they are usually not manufactured by a professional brand. For instance, if there is a T-shirt produced by

Adidas, and another one by an unknown workshop, they mark the same price, which one you will choose? Another is not everyone can afford the price range of music merchandise. Consumers are more likely to be attracted by cheaper stuff such as pure music product.

6 Conclusions

6.1 Summary of the Study

Our target for this study is to investigate: 1) What factors may influence the Chinese consumer behavior on music and its merchandise; 2) What factors may influence the "willingness to pay" of Chinese consumer in music consumption; 3) The similarities and differences between the consumption of music product and musical merchandise in China. In view of the above three questions, we answer our research question as follow:

1) The musical preference and identity can influence both the Chinese consumer behavior on music and its merchandise. Most consumers tend to search for and consume the music genres they prefer, and identify them with the property of specific music. Also, consumers who are fond of music merchandise may identify themselves with the idols' personality, they feel satisfaction during this process. The subculture and music community may also impact on consumer behavior in Chinese music industry. Consumers tend to set up an association between specific music genre and that subculture, then looking for some music or artists which could align with this particular culture connotation. Culture community can set up a context for individuals, and people in specific culture community are easy be influenced on their orientation of consumption in music.

2) The auditory and visual perception, convenience, gender, age, tone of quality and 'feeling be concerned' are the factors that might influence the 'willingness to pay' of Chinese consumers in music consumption. Whether the melody can sympathize with the listeners induce the possibility of purchase. People who are critical to literature might concentrate on the lyric. The Chinese female have higher willingness to pay for musical merchandise than male. The possibility for young teenagers to purchase musical merchandise are also higher than the adulthood who is over 30. Most of the Chinese consumers focus on the tone of quality when they pay for the music, the higher quality the higher 'willingness to pay' of them. Feeling to be concerned are also important for them, and can determine their selection of music platform.

3)The similarity between the consumption of music product and musical merchandise in China is people will identify themselves with both. The difference between the

consumption of music product and musical merchandise in China is the price sensitivity. Consumers' price sensitivity in pure music product turns to be lower, while their price sensitivity on music merchandise are higher.

6.2 Implications

The framework of this study aims at analyzing the specific consumer behavior and its incentives in target market. The inspirations of this theorical framework are from the theories of psychology, consumer marketing and a particular domain (music). Therefore, this frame can be applicable for the study of management science and social science which may refer to interdisciplinary research, especially the final analysis method of table 2 can be taken into consideration.

6.3 Limitations

(1) Research Object

The object interviewees we choose are basically classmates and close friends. But there will be a problem that is in most cases close people will share same interests and hobbies. If the research can be more random on choosing samples, for example, strangers which are barely have connections with each other, perhaps the data will be more representative.

(2) Research Method

The main purpose of the focus group is to stimulate the respondents' interest in the topic, because it is often easier to reach a sympathetic chord and inspire new ideas when multiple respondents are involved at the same time. But there is also a problem with this approach, which is that the topic of music consumption and preferences is more likely to involve privacy issues in some ways. Therefore, the data we get may be biased in terms of expressing the true ideas of the respondents. However, this does not mean that the data is invalid and in some ways, it's impossible to be perfect when getting data.

(3) Scope of Research

The author mainly analysis the Chinese consumer behavior in music consumption from a psychology side. The objective of the study is more subjective than objective and factors such as political and economy issue haven't been taken into consideration. However, because of the limitation of time, we couldn't take all the factors into

consideration. And on the other hand, the influence of external factors on consumers is often not controllable, and macroscopic factors are difficult to be investigated by individual small samples.

6.4 Future Research

In the future research, we'd like to study the external factors such as competitive environment rather than internal factors which would influence the Chinese consumer behavior. By this, the authors can improve the current research and make it more objective and comprehensive.

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Appendix

Focus Group Questions

Shared Questions for Both Groups

1. What kind of music do you like? Does your personality influence the type of music you prefer?

2. What kind of music mostly attracts you? And why does it attract you?

3. Is there any singer or band you will resonate with? Will you buy their album when they release a new one?

4. Generally, what will you follow we you select music the fashion or the classic trend? Which kind of music would you like to pay, the pop music or the classic?

5. Will you try some new music genres? Will you pay for them?

6. Do you listen to different kinds of music in different context? Will the selection of music be influenced by emotion?

7. Have ever you changed your music preference? How did it change?

8. Do you simply listen to the songs in the language you are familiar with, or simply prefer to the music with delighted melody?

9. Which do you prefer, tasting lyrics or melody?

10. Which culture influences you most? Does it influence your preference of music selection?

11. Have you ever taken part in some musical activities? How do you know them? Is it free or not?

Questions for Music Product Group

12. Do you know any music platform? Which one do you mostly use? Is it free or not? Why do you choose it?

13. When will pay for music? Do you prefer listening to the music online or buying a CD or LP?

14. Will you repurchase different types of music?

15. Have you ever changed your attitude towards with aging?

16. What's your friends' attitude towards musical consumption? Will you be influenced by them?

17. Which one do you prefer to purchase more, the music or the musical merchandise?

18. Do you have some favorite singers or bands? How long have you follow them? Have you ever purchase their merchandise?

19. Please list the best and the worst music platform in your mind, both online and offline.

20. Do you think these music platforms should improve their service? If they have improved as you recommend, will you buy music on them?

Questions for Music Merchandise Group

12. Will you buy some music merchandise? Do you think they are worth buying?

13. Will you repurchase the music merchandise for different types?

14. Have you ever change your attitude towards music consumption with aging?

15. Will your friends buy music merchandise? Will you follow them?

16. Music and music merchandise, which one do you prefer to buy?

17. Do you have some favorite singers or bands? How long have you follow them? Have you ever purchase their merchandise?

18. Please list the best and the worst sales platform of music merchandise in your mind, both online and offline.

19. Do you think these sales platforms of music merchandise should improve their

service? If they have improved as you recommend, will you buy merchandise on them?