The Online Streaming Music Market and the Chance of Adoption of a New Online Streaming Music Service

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ABSTRACT
The aim of this paper is to research the market of online streaming music services. The online streaming music market is a relatively new rapidly changing market. Companies enter this market in a rapid fashion and new services can become popular in a short time amount of time. This research was carried out to measure the user acceptance of a new service, Apple Music, using the Technology Acceptance Model. We also identified the most popular online streaming music services on the market and the percentage of premium (paying) users and we identified the most important factors of online streaming music services. Our results show that the intention to use Apple Music was low. The results show that Spotify is by far the most popular online streaming music service. The amount of premium users amongst our respondents was very high compared to the normal percentage of paying users on online streaming music services. We were not able to measure the user acceptance of Apple Music as two out of three factors were proven to be insignificant to the intention to use.

Keywords
Digital music, online streaming music, Technology Acceptance Model, online streaming music services, Apple Music

1. INTRODUCTION
Streaming digital music is rapidly conquering the music market[16]. Multiple providers of online streaming music are quickly growing. The success of this sector has caused big international companies to make an investment in this area and launch their own services. In 2011 Google has launched its Google Play Music Platform and in 2015 Apple has launched its Apple Music platform[13, 15]. Apple and Google are both enormous companies, Apple is placed 12th and Google is placed 39th on the Forbes list of the worlds biggest public companies[17]. This shows that the market of online streaming music services is an interesting option for large technology companies to invest in.

Data collected by the International Federation of the Phonographic Industry shows that the revenue generated by digital music is increasing each year[16]. The revenue has increased from 4.4 billion dollars in 2009 to 6.9 billion dollars in 2014, this is an increase of more than 50%. Data from the same source shows that the market share of both subscription and ad-supported streaming are increasing rapidly, with an increase of 39% for subscription streaming and an increase of 38.6% for ad-supported streaming. This while the revenue generated by the permanent downloads of music is declining by 8%. Permanent downloads are music files that are bought by consumers on online markets like iTunes, that once bought are the ownership of the buyer. Most digital streaming digital music services like Spotify and Apple Music also give the option to customers to download individual music titles to listen to when not connected to the Internet. However the big difference is that these songs will never become the ownership of the customer. When the subscription with the online streaming music service has ended these songs will be deleted automatically. The streaming services consists of large players like Spotify, Deezer, Google Play Music and now the new contender in the market, Apple Music[2, 5, 6, 9].

The data explained above shows that the revenue and market generated by streaming music services is growing rapidly. This is a reason why Apple has entered this relatively new market. Apple already has a history of changing the music market. Apple’s digital retail platform for music, iTunes, is the largest retailer of music in the United States since 2008[12]. In 2015 Apple has entered the market with Apple Music. Apple Music currently has more then 11 million subscribers for its music service[14]. It is however unsure whether all these subscribers will continue with Apple Music when their trial period has ended. These subscribers are all trial accounts and Apple provides the first three months of Apple Music for free, so it is too be seen if all the subscribers will stay with Apple or switch to another service. 11 million users subscribed is a large number however, and it places Apple Music in the top of the streaming music providers when looking at the amount of subscribers[4].

This research will focus on subscription based online streaming music services. We exclude other services, such as Youtube. While Youtube is often used to listen to music the primary focus of Youtube is on watching videos, and not primarily to listen to music. It is for example not possible on Youtube to listen to a pure audio file, a video file also has to be watched. Overall the difference between Youtube and online streaming music services are to big for Youtube to be included in this research. We will focus on Apple Music to measure the user acceptance of a new streaming online music service.
2. RESEARCH QUESTIONS

The following research question was defined to research the factors of choosing a specific online streaming music service.

- What are the important factors to choose a specific online streaming music service or to switch to another service?

Online streaming music providers can differ on many levels. By answering this question we aim to find out what the most important factors are for choosing an online streaming music service. A few factors that may lead to this are music quality, price and the music library offered by the service.

In order to answer the main research question the following questions were defined to give more insight in the current usage of streaming music services and the most important reasons to choose a specific online streaming music service.

- Is it possible to measure the chance of adoption of a powerful new player entering the existing market of online streaming music? In this research we aim to find out if it is possible to measure the chance of adoption of Apple Music by its potential future users. This will be done by using an accepted model to measure the user acceptance of hedonic information system and add extra questions to get more insight about the current market distribution of online streaming music services.

- What are the most popular online streaming music services and how satisfied are their users?

There is data available about the amount of users on each online streaming music platform. However this data is often provided by the services them-self. In this research we will measure the usage of different online music platforms, and measure how content the users are about the service they use. This will give an indication about the important players in the online streaming music market and the likeliness they are to switch to another service, such as Apple Music.

- What is the current percentage of paying users of online streaming music services?

Most online streaming music providers use the freemium model (see the background section for more information on this subject). In the freemium model most of the revenue is generated by the paying (premium) users. This is why it is important to see what the current distribution of paying users is on the different platforms. We will also check if there is a difference in paying and free users in their happiness of their current systems.

Answering the questions will provide us with the most important factors for choosing a specific service, such as music quality or the price of the service and will also give us an insight in the chance of adoption of Apple Music. The answer will also give an overview of the current distribution of users amongst the different online streaming music services and the corresponding happiness of their users and the percentage of premium users.

3. METHODS AND TECHNIQUES

The research will consist of two parts. The first part consists of a literature study to find previous research in the field of online streaming music and to create a theoretical background. The second part of the research consists of an empirical research in the form of an online survey.

3.1 Literature Research

A literature research was conducted to create a theoretical background in the research of online streaming music. With the literature research we aim to find previous research in this field of research and to find additional research that may help and support this research. In the literature review the outlines set by Wolfswinkel were used on how to use grounded literature to rigorously review literature literature[24].

The following field of research were chosen to search for literature: Computer Science, Engineering, Arts and Humanities, Social Sciences, Business, Management and Accounting, Economics, Econometrics and Finance. The source that was chosen to search for relevant literature was Scopus, a large scientific with peer-reviewed literature. The specific search term that was that was chosen was "(streaming music) OR (online streaming music) OR (streaming music services)". This search term produced 517 results. Literature that was published before 2010 was excluded from the sample. The assumption was made that most of the literature published prior to this date was not relevant to this research because the findings would be outdated in the rapidly changing field of online streaming music. After this exclusion 229 results were left. This sample was refined by hand to exclude the articles that were not relevant to this research. After the final refinement 8 relevant articles were left.

4. THEORY AND BACKGROUND

4.1 Background

In the early 21st century the music industry suffered from a crisis. Declining sales led to financial losses [25]. The music industry explained the crisis due to the problems with Internet piracy. However the emergence of new software formats and distribution platforms on the Internet led to a more structural problem for the music industry in these times[25]. Over the years the music industry has embraced the Internet as an important distribution channel as 46% of the total revenue in 2014 was generated on digital platforms. First the emergence and popularity of large online music markets such as iTunes led to an increase of revenue over the Internet. Which first led to iTunes becoming the largest music retailer in the United States in 2008 [12]. In the last years the emergence of subscription based online streaming music services are becoming an important source of income for the music industry, as the revenue generated by the subscriptions is now 23% of the digital revenue generated.[16]. Data shows that the revenue generated by subscription services is steeply increasing (an increase of 39% in 2015) and the revenue generated by download sales in stores such as iTunes is slowly declining. However, the revenue generated by downloads still accounts for the bulk of global digital revenue.[16].

However while the revenue generated by the streaming music services is increasing, generating profit is still difficult. Spotify, one of the largest online streaming music services, is struggling with making profit, and even recorded an increasing operating loss the past years[10]. The largest portion of the costs for Spotify is due the costs of royalties and distribution platforms.
Most online streaming music providers use a freemium model [18]. The freemium model consists of a free downgraded version and a paid premium version of a streaming service. In the freemium model the paying customers (the premium users) subsidize the unpaying ones [19]. The average conversion rate of a premium service is around 5% [18]. In the premium version of Spotify the benefits consist of the following [26]:

- The premium version has no advertisements while the basic version has advertisements that interrupt the listening of music in between songs.
- The premium versions has unlimited listening to music whilst the basic version can have a limited amount of play time per month. (such as the case of Spotify, were the basic version is limited by 20 hours of playtime per month)
- The premium version offers the downloading and saving of songs to listen to offline, this feature is not supported by the basic version of the service.
- The premium version supports a higher audio quality (bit rate) in comparison to the free version.
- Exclusive new releases are sometimes limited to the premium version.

These benefits of premium users over basic users are usually very similar when looking at the different online streaming music services. It is however not known which of these benefits are the most important and which of the benefits will lead to users switching to another service or which benefits lead to users paying for the premium version of the service. Data from Spotify shows that it is important to convert basic users to the premium model, as a large portion (91%) of the income is generated by the premium users, whilst these premium users account for only a small percentage of the total (Spotify claims that 25% of their total users are premium users, that pay for the service).

Piracy is a problem in the music industry, a high amount of music is downloaded or streamed in a illegal fashion. Because of this the music industry may lose money, however it is still unknown what the precise effect of piracy is on revenues, as different studies show different effects on the affected revenue by piracy [23]. Dorr et al. showed that streaming online music services can be a viable alternative to piracy. However the pirates still prefer the free, basic version of online streaming music services over the premium version [23]. Data from Norway shows that the increase of streaming music can lead to a large decline in the piracy of music [8]. These results show that online streaming music can be a viable alternative to piracy.

4.2 Model

In order to measure the likelihood of success, or acceptance of Apple Music by its target audience, we need to measure the intention to use the system. A widely used model to measure the acceptance of an information system was created by Davis, called the Technology Acceptance Model (TAM) [21]. Davis proposed that the acceptance of an information system can be measured by two factors. These two factors are the perceived usefulness, defined as "the degree to which a person believes that using a particular system would enhance his or her job performance" and perceived ease of use defined as "the degree to which a person believes that using a particular system would be free of effort". In order to measure these two factors Davis created a model that can be adapted to measure the user acceptance of an information system [21]. In 1992 Davis added a third factor, perceived enjoyment. Perceived enjoyment is defined as "the extent to which the activity of using the computer is perceived to be enjoyable in its own right, apart from any performance consequences that may be anticipated" [28, 22].

Apple Music can be considered as a hedonic (pleasure-oriented) information system, because streaming online music services will mostly be used by its users for their own enjoyment. Hedonic information systems are different to utilitarian information systems that are aimed at increasing the productivity of its users. In this research we use the adapted Technology Acceptance Model created by van der Heijden, as this adapted model was created to measure user acceptance of hedonic information systems such as Apple Music. The difference is important because van der Heijden states that is an important boundary condition to the original Technology Acceptance Model and that perceived usefulness becomes a less important factor whilst perceived enjoyment and ease of use are more important predictive factors of intention to use in a hedonic information system [28].

In this research we use the Technology Acceptance Model created by van der Heijden to measure the user acceptance. The adapted model can be found in Figure 1. We use the results from the different factors, ease of use, usefulness, enjoyment and intention to use to predict the user acceptance of Apple Music. The questions about usefulness and ease of use were included from the original TAM model by Davis [21]. The questions about enjoyment were included from the third factor added by Davis in 1992 [21]. The questions about the intention to use were included from the research of Venkatesh in 2000 [29].

![Figure 1. Adapted TAM for hedonic information systems by van der Heijden](image)

5. RESULTS AND ANALYSIS

5.1 Data collection

To collect data a survey consisting of two different parts was created. The first part consisted of the general questions (age/gender/education level) and questions about the general usage and happiness of the online streaming music services used. For these questions please see Figure 2. The general questions were created to analyze the respondents. The questions about the current service were created to give an insight about the most popular services, the reasons to switch to another service and the amount of paying customers per service.
Figure 2. General questions and questions about usage and happiness about current usage of online streaming music services

The second part of the survey consists of questions that were adapted from the Technology Acceptance Model that was modified by van der Heijden to measure the intention to use of hedonic information systems. These questions are asked to measure usefulness, ease of use, enjoyment and intention to use. See Figure 3 for the table with the adapted questions.

The survey was created on Google Forms. The survey was distributed on social media. The data from the survey was analyzed using SPSS (Statistical Package for the Social Sciences).

6. RESULTS

This section contains the results of the survey. The analysis of the results is explained in the next section (analysis). The survey was distributed on social media. A total of 50 respondents filled in the survey completely (N=50). From the respondents 70% was male and 70% of the respondents is currently a student. The mean age of the respondents was 25.94 years. 96% of the respondents is currently using an online streaming music service. The results show that Spotify is the most popular streaming music with an usage of 76% and SoundCloud a second with 12%. None of the respondents uses Apple Music as their main online streaming music service. For a division of the usage of services please see Figure 4. 78% of the respondents claimed to know about Apple Music prior to filling in the survey. 42% of the total respondents (or 44% of the respondents using a online streaming music service) use a premium version of an online streaming music service. The respondents were also asked about the possible reasons to switch to another service, these results can be found in Figure 5. The results of the second (TAM) part were analysed using a linear regression analysis, the results can be found in Figure 6. The results show that ease of use and enjoyment are not significant predictors, with a p value of 0.898 and 0.937 respectively. Usefulness is coming close to the accepted significance of p <0.05 with a significance of 0.058. We can conclude that only usefulness is a (somewhat) reliable predictor of intention to use in the results of the survey. The results also showed that overall the respondents were happy with their current online streaming music service. There was not a significant difference in happiness between services, this can be observed in Figure 7. The difference in happiness between free and paying users is also relatively small, this can be observed in Figure 8.
The results show that the music library and the price of an online streaming music service are the most important factors for choosing a service or switching to another service. Less advertisements and the sound quality of the music were deemed less important. These results can be found in Figure 6 (respondents were able to choose multiple options). The respondents were also able to enter their own custom factor. However, none of the respondents entered a factor that was different from our standard factors, this shows that the factors asked are the most important factors in choosing a service. Following these results we can argue that a service should focus on creating a service that is both cheaper in price then other services and/or has a much larger music library in order to ‘steal’ customers from competing services or attract new customers that have yet to find a suitable online streaming music service. The amount of advertisements and the quality (bitrate) of the music should not be forgotten, as still a significant amount of respondents deemed these factors important.

An adapted Technology Acceptance Model was used to measure the user acceptance of Apple Music. The results were in contradiction with the findings of van der Heijden [28]. Van der Heijden stated that ease of use and enjoyment are stronger indicators of intention to use then usefulness in hedonic information systems. The analysis of our results shows that only usefulness can be seen as an indicator of intention to use. Our data does not explain the cause of this effect, however there are several possibilities. The N(50) in this research is relatively low, a higher N may lead to our model being more in line with the findings of van der Heijden, but this is only a possibility, more research in this field is required. Another reason why our model may not be in line with the TAM model is because a large portion of our users (96% of the respondents already use a streaming online music service) is because users are already happy with their current service, and as the services offered by Apple Music over other services is largely the same we can argue that the relative advantage of Apple Music may be seen as low.

The relative advantage of an innovation or product is described by Rogers as "the degree to which an innovation is perceived as better than the idea it supersedes by a particular group of users, measured in terms that matter to those users, like economic advantage, social prestige, convenience or satisfaction. The greater the perceived relative advantage of an innovation, the more rapid its rate of adoption is likely to be[27]." We can argue that the relative advantage of Apple Music over other services, like Spotify, is relatively low. The amount of music offered, the price, quality and other services offered to the premium users are largely the same. The relative advantage of Apple Music over other services is probably not seen as very high by the respondents and this can be reason why the intention to use Apple Music is relatively low.

The analysis showed that Spotify was the most popular online streaming service amongst the respondents. The second most popular service was Soundcloud, by a large distance. None of our respondents claimed to use Apple Music while 78% of the respondents claimed to know about Apple Music. This is an interesting statistic as Apple reportedly has 10 million paying subscribers (versus 20 million of Spotify)[3]. Overall the respondents were happy with their current service. The mean happiness of SoundCloud was a bit lower then the other services, but it is possible that this is due to the smaller number of respondents using SoundCloud. The results about happiness show that it will be a difficult task for Apple Music to ‘steal’ users from other services.

The results of our survey show that a large portion of the respondents use a premium version, 42% of the total respondents (or 44% of the respondents using an online streaming music service) use a premium version of their online streaming music service. This is a high percentage as the conversion rate of freemium services is normally around 5% and Spotify claims that their conversion rate is around 25%.[18, 1]. This high percentage can have several reasons, one possibility is that not all of the users actually directly pay for their premium subscription. Instead, Spotify has closed deals with other companies, such as KPN and Tesla to include a free or discounted premium

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<table>
<thead>
<tr>
<th>Reasons for switching</th>
<th>Yes(count)</th>
<th>No(count)</th>
<th>Yes(percentage)</th>
</tr>
</thead>
<tbody>
<tr>
<td>No, I would not consider switching to another service</td>
<td>10</td>
<td>34</td>
<td>22%</td>
</tr>
<tr>
<td>I would consider switching if the other service has a better/larger music library</td>
<td>22</td>
<td>38</td>
<td>44%</td>
</tr>
<tr>
<td>I would consider switching if the other service is cheaper</td>
<td>20</td>
<td>39</td>
<td>40%</td>
</tr>
<tr>
<td>I would consider switching if the other service has less advertisements</td>
<td>13</td>
<td>37</td>
<td>26%</td>
</tr>
<tr>
<td>I would consider switching if the other service offers higher quality music</td>
<td>11</td>
<td>39</td>
<td>22%</td>
</tr>
</tbody>
</table>

Figure 5. Factors for switching to another online streaming music service

<table>
<thead>
<tr>
<th>Model</th>
<th>Unstandardized Coefficients</th>
<th>Standardized Coefficients</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>B</td>
<td>Std. Error</td>
</tr>
<tr>
<td>1 (Constant)</td>
<td>0.805</td>
<td>1.153</td>
</tr>
<tr>
<td>Usefulness</td>
<td>0.425</td>
<td>2.156</td>
</tr>
<tr>
<td>Ease</td>
<td>0.519</td>
<td>2.335</td>
</tr>
<tr>
<td>Envyment</td>
<td>0.204</td>
<td>2.685</td>
</tr>
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</table>

Figure 6. Regression analysis of the TAM questions

<table>
<thead>
<tr>
<th>Usageofonlineservicestream</th>
<th>Mean</th>
<th>N</th>
<th>Std. Deviation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spotify</td>
<td>5,456</td>
<td>38</td>
<td>1,338</td>
</tr>
<tr>
<td>Deezer</td>
<td>5,333</td>
<td>1</td>
<td>.</td>
</tr>
<tr>
<td>SoundCloud</td>
<td>4,333</td>
<td>6</td>
<td>1,054</td>
</tr>
<tr>
<td>Other</td>
<td>5,444</td>
<td>3</td>
<td>1,295</td>
</tr>
<tr>
<td>Total</td>
<td>5,313</td>
<td>48</td>
<td>1,292</td>
</tr>
</tbody>
</table>

Figure 7. Mean happiness of the different services

<table>
<thead>
<tr>
<th>Paid/free</th>
<th>Mean</th>
<th>N</th>
<th>Std. Deviation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Free</td>
<td>5,160</td>
<td>27</td>
<td>1,427</td>
</tr>
<tr>
<td>Paid</td>
<td>5,508</td>
<td>21</td>
<td>1,098</td>
</tr>
<tr>
<td>Total</td>
<td>5,313</td>
<td>48</td>
<td>1,292</td>
</tr>
</tbody>
</table>

Figure 8. Mean happiness of free and paying users
version of Spotify when a customer buys a telephone or buys an electric car[7, 11]. Another possibility can just be that customers (and especially mainly youngsters such as in this survey) are more likely to pay for all the benefits of a premium account. This is interesting, as explained in the Background section previous research has shown that youngsters are more likely to pirate and less likely to pay for digital music, but it is possible that this trend is changing and that youngsters are embracing the freemium model of online streaming music services (this trend was observed in Norway [8]). The results show that there is a rather small difference between happiness when looking at basic and premium users, this while premium users get a lot more features than basic users. This can be explained because premium users pay money for the service, and are thus more critical of the service they are offered.

8. CONCLUSION
We measured different factors for choosing an online streaming music service. The amount of music (size of the music library) and the price were considered to be the most important factors for choosing a specific service. The amount of advertisements and the quality (bitrate) of the music were deemed less significant. However, while these factors are less significant then the amount of music and price, they are still important factors for a portion of the respondents. The Technology Acceptance Model adapted for hedonic information systems was used to predict the user acceptance, or intention to use, of Apple Music. Ease of use and enjoyment were proven to be insignificant factors for the intention to use Apple Music. Usefulness was proven to be a somewhat significant predictor. Amongst the respondents Spotify was by far the most used online streaming music service. A large portion of the respondents claimed to know about Apple Music prior to filling in the survey. Interestingly, none of the respondents used Apple Music. Overall the respondents claimed to be happy with their current online streaming music service, showing that it will be difficult to persuade these users to switch to another service. A very high percentage of our respondents used a premium version of their online streaming music service. Past research pointed to a much smaller conversion rate (the percentage of paying users in a freemium service) and also the average conversion rate that is published by services like Spotify is much smaller. Overall we were able to identify key factors in choosing a specific online streaming music service.

9. DISCUSSION AND LIMITATIONS
• In this research we used a relatively small population size of N=50. This is a possible reason for the fact that our results differ from the research of van der Heijden[28]. Our results could suffer from a possible selection bias, as the majority of the respondents were students in a particular age group. This could be a possible reason for some of the observed effects.
• This research was carried out in the Netherlands, because of this the results can not be generalised for the whole world. The results of this study could be very different when it was carried out in other countries.
• Another factor that was not taking into account in this research is brand loyalty. Brand loyalty can lead purchase loyalty and attitudinal loyalty[20]. So it is possible that users of Apple products such as the iMac and iPhone are more positive and likely to use Apple Music than others.

10. FUTURE RESEARCH
Qualitative research, such as interviews, are required to find out what the specific reasons for switching to Apple Music can be. The findings in this research did not correlate with the normal TAM for hedonic systems. Further research in this area is required to find out what the factors for user acceptance of Apple Music are. Also further research is required to explain why none of the respondents use Apple Music, and why the amount of premium users amongst our respondents was high.

11. ACKNOWLEDGEMENTS
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12. REFERENCES


