

Louvain School of Management

BAND: A strategic framework to help indie rock musicians build their audience via streaming platforms and social media

How can young rock musicians use specificities of the today music industry to get their music known?

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Abstract

This paper describes how independent rock musicians have been impacted by the digital revolution that reshaped the music industry. The purpose is to help them understand how to use streaming platforms and social media to reach an audience and get their music known. For framing the research, three assumptions are formulated saying that streaming platforms are the leading distribution channel for music; the same is true for social media as the prominent promotion and dissemination channel, and independent musicians should have or develop entrepreneurial skills.

The methodology of this thesis differs from usual qualitative methods as I use a practice-based approach. To confront literature with musicians' reality, I take the role of practitioner-researcher as I observe my attitudes as a musician and attitudes of the other musicians of my independent rock band towards those new technologies. This specific methodology, well-known from artistic researchers, has been inspired by Skains' article (2018) about Creative Practice as Research.

The research takes a general perspective of the music industry, the listener's perspective, and musicians' one. This funnel-shaped approach allows considering all stakeholders while ending with the main subject, the independent musicians. This thesis has developed a new typology of listeners (music consumers), a practical guide for independent musicians, and a theoretical framework with managerial scope intended for musicians and entrepreneurs. The 10-step guide designed for independent musicians summarises the critical moments of a musical project, such as the release of an EP or an album. It integrates the key actors described throughout this work that are streaming services and social media. Finally, the BAND framework highlights the four key elements to be careful about when launching any project.

The business models studied, and the new skills that musicians are led to develop are further evidence of the upheavals in the music industry. Beyond the managerial and entrepreneurial scope, this thesis aims to take an accurate picture of independent musicians' situation - especially rock musicians – in the particular context of the digital revolution experienced by industry since the advent of the Internet.

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“Sometimes I play something, and I haven't recorded it, and I don't know where it came from, why my hands did what they did, what key it was in, anything.” – Rick Wright

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Chapter 1. Introduction

In the conclusion of an article of 2001, we can read: "The Internet is bringing new key players and business models into the music industry" (Lam & Tan, 2001). This statement seems a good way to introduce this thesis about musicians and the impact of streaming services and other new technologies on their creativity, behaviour and relationship with their audience. This phenomenon is generally called **digitalization** and represent a great paradigm shift in a lot of industries, music industry included.

This thesis aims at understanding how young independent musicians can benefit from the three main channels to reach an audience nowadays that are streaming platforms, social media, and live performance. The methodology explained in the next chapter is unusual as it puts the practitioner, me, in the centre of the research. The main advantage of this alternative method is that it provides observations directly from the heart of the matter. The main constraint has been time and the sanitary situation that forced me to change my plan and limit my scope of research to my personal experience.

Thus, the first step of this study consists in understanding the new dynamics regulating the music industry (cfr. Chapter 3). This step is crucial for understanding the changes of consumption patterns in reaction to the possibilities offered by new technologies as streaming platforms (cfr. Chapter 4). The final theoretical step of the research, and the longest, goes to the core of the matter by studying musicians' positioning in the industry (cfr. Chapter 5). This last point is divided in three sections: taking first a general perspective of the supply-side to then, focusing on the rock music part of the supply and finishing by analysing independent music in the specific case of indie rock music. The theoretical framework established, the Chapter 6 displays the confrontation of the theoretical knowledge with the case study of *How To Six*, young Belgian musicians that consider themselves as an indie rock band.

This confrontation is framed by three assumptions that I am formulating at the end of Chapter 5 about the current use of streaming platforms and social media and the specific profile of independent musicians. Following that, I am proposing two practical tools, one intended for independent musicians and the second for musicians and entrepreneurs. The first consists of a practical guide explaining the process for integrating social media and streaming platforms step by step. The second is the BAND framework developed thanks to my research that highlights the essential points to consider when launching a project, whatever its matter.

Those two practical outputs answer to the following question: "How can a young rock musician use today's specificities of music streaming platforms to get his/her music known?".

Chapter 2. Methodology

Section 2.1. Context

This research aims at analysing the effect of the new technologies affecting the music industry on the creative process of young musicians. More specifically, the research focuses on my experience as a young musician. These observations have taken place from 1st December 2020 until now. The beginning corresponds to the first time I published a song cover on Instagram. Two interesting points of view are considered here: the group and my viewpoint as a pianist, vocalist, and songwriter.

The research methodology has been adapted due to the particular context of the COVID-19 crisis. Ideally, a series of testimonials of young rock bands would have been collected. A broader sample would indeed allow relevant comparisons between their experiences. However, the study is only based on my experience as an indie rock band and songwriter member.

Section 2.2. Research method

In her article "Developing qualitative research questions: a reflective process" (2009), Jane Agee writes, "although initial questions often emerge from a researcher's passions and interests in particular topics, ultimately, the goal is to refine and possibly expand the inquiry through reflexive, iterative, and dialogic processes that are central to the theoretical and ethical positions taken up by the researcher." In this thesis, the same approach is engaged as I first looked at my passion, music and particularly rock music, to question its industry's workings and arrive at a final research question.

The research approach is **funnel-shaped**. First, the paper provides a brief historical overview of the music industry to date. The emphasis is on the emergence of new technologies that have led to a complete reshaping of the industry, focusing on streaming platforms and the role of social media. Then, it examines both the demand and supply sides of the industry through new means of consuming music. There are many genres in the music industry. In this paper, I focus mainly on rock music, and I tackle the independent music tendency. As explained above, the scope of the research is relatively restricted due to COVID-19, limiting the potential conclusions.

Two musical projects are analysed: **Maun** and **How to Six**. The former my stage name, refers to my personal project on social media. On 1st December 2020, I launched the *Christmas Challenge* on Instagram (and Facebook) that ended on 25th December 2020. It

consisted of publishing a song cover per day on Instagram. I nearly ran this side-project independently. The latter is the band we form with four other musicians. It comprises two singers (a soloist and a pianist), a bassist, a drummer and a guitarist. "*How to Six*" is a collective project, and we intend to earn our livings by making music.

This case-based study relates to personal comments about the use of social media and streaming technologies. They provide a more in-depth comprehension of the status of musicians at present. It is crucial to notice that personal involvement in the research framework could thwart objectivity. Further studies are inevitable in that field. Nevertheless, I intend to keep a critical position thanks to the constant shift between theory and practice. As the primary source of my practice comes from artistic projects in which I am directly involved, I must pay attention to the methodological framework used to offer the most consistent and objective results. To do so, I get inspired by the paper of R. Lyle Skains (2018) about Creative Practice as Research. Since this thesis does not aim to study musical creation itself, the practice-led approach cannot be implemented word-for-word. Skains still gives insight into the methodological choices that allow the researchers to put their art in the centre of their study.

In her book 'Practice-based Design Research, Laurene Vaughan (2019) explains the new tendency of investigating as a researcher while being a practitioner in the research field studied. It implies new methodologies to frame those new types of research, but the most exciting aspect of such an approach is the closeness of the research with the subject as he or she is involved.

My methodology is partially based on Skains' article as she explains a method to pursue research in a specific field with personal art practice as the subject. In the case of this research, I consider myself as a **practitioner-researcher** at the intersection of the two fields of management sciences and music. In her article, Skains suggests a particular outline of the Practice-based Research Method (Appendix A) that gathers different possible approaches such as autoethnography, creative cognition and practice-based research. As the practice part mainly consists of self-observations and interviews of my band's members, I decide to apply a framework that ensures the consistency of my research and objectivity.

The auto-ethnography approach (Ellis, Adams, and Bochner cited in Skains, 2018) allows the researcher to use their artistic practice and experience to study a broader subject applied to the specific artistic field. Here, I study the emergence of new technologies (music platforms and social media) in the music industry and relate it to my own experience as a young musician. Skains also points out three actions a practitioner-researcher should take to overcome critical consciousness. First, I defined a research question to ensure a more objective purpose

that I continued to precise. Second, my observations consist of investigating **How to Six** members and past personal experiences that I analyse later to let me take a step back. Third, the **Christmas Challenge** project has already been released on social, and that allows me to look back at this experience with the critical distance. This experience exemplifies the part of my research about social media (Skains, 2018).

She writes that "distancing [...] both in time and perspective" is essential, and it is particularly true for my research. As already explained, a significant part of the activities observed took place in December 2020 and January 2021. I formulate hypotheses to structure the discussion with my group members and avoid influencing them with my inevitably biased opinion. Moreover, the article explains that the advantage of multimodal texts is the diversity of representations that illustrate different purposes. The principal observations are so diverse that they allow my research to be more exhaustive and adopt different views to conclude by confronting them with each other and the theory (Skains, 2018).

Finally, Skains says that as the research question is based on creative practice, the idea is to apply new knowledge to already mastered practice. It is the case here as I intend to apply new insights thanks to my researches to my practice of music. However, the aim here is not to modify our creative process as musicians but to analyse whether these new insights should influence it. To do so, I question musicians about their opinion on social media in young artists' lives and the distribution channel represented by music platforms.

The thesis of Studley (2020), "exploring real-time music composition through competitive gameplay interactions", and the doctoral thesis of Sarah Vandemoortle (2020) at KULeuven are great examples of papers using the practice-based methodology properly. The method is also often used in Artistic Research, an scope of research in which I have immersed myself this year through the "Artistic Research in Music – An Introduction" MOOC provided by KULeuven. Most researchers are musicians above all in this specific research field and use their 'practitioner' statute to serve their purpose.

To sum up, the matter of this research and, notably, its methodology is to provoke the convergence between knowledge through the theory and discovery through interviews of my band's members experience. I wish to address two audiences through my research, academics (and managers) and musicians. Thus, my thesis will have two outputs: creating a theoretical framework for independent musicians and entrepreneurs and a practical guide for young indie musicians.

Chapter 3. The music industry: an ever-changing industry

Section 3.1. The music industry

In this part, we will see who these **new key players** are and which **business models** emerge with the industry evolution. We will first analyse how music industry has evolved after the paradigm shift of digital advancement. Then, we will go through the business models of today music industry and will look at the two main aspects studied in this thesis: the music streaming platforms and social media.

The title "ever-changing industry" is not chosen randomly. By taking an interest in music and its history, one quickly realises that since the 20th century and even earlier, the music industry has known great upheavals either brought or supported by technological revolutions. A brief historical point about the evolving industry is presented in Section 5.2 where the emphasis is made on the rock music movement. Music industry is in constant evolution but some technological revolution, such as the Internet and the digitalization at the beginning of this century, has radical implications on the industry.

The part on which this work focuses concerns the last major technological revolution that has affected the music sector and many others: **digitalisation**. Digitalisation is defined as "the process of converting something to digital form" (Merriam-Webster, n.d.). You only must look around you to see how this has changed the way we consume music, now available at your fingertips, on your smartphone, and easily played in background, thanks to your Bluetooth speaker.

1. *The general digitalization of creative industries*

Krueger, in his book "*Rockonomics*" published in 2019, underlines the fact that music is a small part of the entertainment economy. In fact, the music industry is a specific part of the more general **creative industry** gathering film, publishing, design and visual arts industries to name a few. At that macro level, it is already seen that new technologies are reshaping the business models. In this paper, the description given by Dümcke is kept: "a **business model** in the CCSs¹ is understood as a set of assumptions about how an individual entrepreneur or an

¹ CCSs is the acronym for Cultural and Creative Sector. The European Commission gives the following definition: "Cultural and creative sectors are comprised of all sectors whose activities are based on cultural values, or other artistic individual or collective creative expressions and are defined in [the legal basis of the Creative Europe Programme](#)" (*Cultural and Creative Sectors*, s. d.)

organisation create value, deliver value to a customer, and capture the value and turn it into economic, social and/or cultural output" (Dümcke, 2015).

The music industry is thus not the only industry concerned by the digitalization process. For example, in the book publishing sector, the digitalisation has had 3 impacts at different levels with the arrival of new intermediaries and on-line retailers. Through that shift, the concentration gets higher at the retail level, reduces at the other intermediate level and the on-line retailers make the direct link between creators and their consumers possible so that creators get a better bargaining power concerning their contracts (Hviid et al., 2018). According to Hviid et al. (2018, p. 273), the same kind of dynamics are observed for the music industry: "[...] both the record company level and the retail level are now best characterised as concentrated oligopolies".

2. The challenges of digitalization in the music industry

According to Dümcke (2015), the rapid evolution in business models is explained by the 2008 economic crisis, but it is also a consequence of the Internet revolution. Such evolution is generally due to change in an industry and, as a result, the new challenges it is facing. In the document, two of those challenges are interesting for the current research and can be applied to the music industry.

First, **digital** products, as opposed to analogue products that predominated on the market earlier, have contributed to the reshaping of the music industry and new business models must emerge such as crowdfunding, streaming, P2P, self-publishing, etc. (Dümcke, 2015). This significant change in the music industry led to piracy concerns and copyright laws review, voluntarily set aside during this research. Second, **consumer behaviour** evolves as the digital tools offer consumers new possibilities like generating content, and so value (Dümcke, 2015). As a result, the boundaries between supply and demand get blurred, and the sector must reinvent to fit those changing behaviours.

This work tries to take the viewpoints of the three major groups of stakeholders in the music industry separately who are the **intermediaries** between the supply and the demand, i.e. labels and streaming platforms, the **listeners** (the demand side) and the **musicians** (the supply side); we already see the links that are automatically established. This effect is strengthened by the platform nature of the streaming services that dominate the music market. Those services are the new middlemen between the two sides of the traditional music market. By recalling the theory of platforms, those two groups are more porous and less strictly defined than before.

3. *Music or recording industry?*

It is essential to highlight the difference between the **music industry** and the **recording industry**. The former refers to a more generic term that englobes all the stakeholders on the music market and the latter to a more specific part of the music industry that focuses on distributing and promoting music (Pastukhov, 2019). Here, the use of the term 'music industry' is generally preferred as it integrates streaming platforms, social media, live performance, and fan engagement, and can be simplified by 'industry'. Since the emergence of specific genres such as rock and soul in 50s, the supremacy of recorded music sustained until the advent of digital technology that encapsulated many links of the value chain (cfr. Chapter 5).

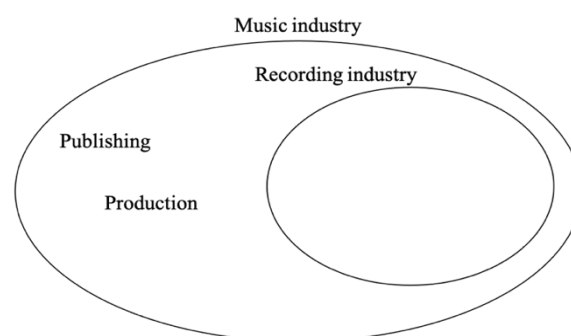


Figure 1: Simplified structure of music industry

In reaction, record labels have started calling themselves *music companies* and expanding their expertise with new contracts such as 360° deals encompassing new activity domains in the scope of streaming. The aim was to grapple with more revenue sources to cushion the loss of speed of record sales. This strategy has just served to delay an unavoidable reversal of positioning to stick to the new business models (Negus & Keith, 2019).

Beyond the record labels, the role of musicians has been profoundly redefined as 'content providers', report the authors. The very definition of music is questioned, and the notion of product is abandoned for that of **content**. The value creation is deeply impacted due to a more general trend of **datafication** (explained in the streaming platform section) (Negus, 2019). With this new evolution, the question of **value** and, more precisely, artistic value is reconsidered; this is a point that comes up throughout this work as the question of value is related to the idea of transaction. The consumer values the music he or she listens to; the musician who writes music is the one who creates value, and the whole can be interpreted as a **value transaction**.

4. *Record labels*

It is impossible to talk about the music industry without mentioning record labels. A **label** is defined as "a company that produces and sells records, CDs, and recordings" (Collins, n.d.). Those essential players suffered from the internet revolution and must now reinvent. According to Lam and Tan (2001), the record labels needed to adapt their strategy to the

Internet, focusing on music creation, talent prospection and imitating online retailers' concept of music distribution. The idea is to offer consumers the possibility to listen to music when and where they wish. Another way of seeing labels is brought by Mark Fox (2004), who considers them as venture capitalists because they invest in many different artists expecting just a few of them to become profitable and recoup the investment in the whole ecosystem of musicians.

This assumption was already shared by Fox (2004) who assumed that free music has redefined power forces in the music industry. He explained that the two main effects of paradigm shift were: first, **reducing costs** and then, **lowering barriers to entry**. MP3 technology made the access and distribution of music more straightforward, and as a consequence, piracy was made possible. Peer-to-peer networks extended the music catalogue of every listener. Moreover, he said that small companies would struggle in a more competitive and highly concentrated environment. As a result, competition is more challenging for record companies (Fox, 2004).

Record labels are far from disappearing from the industry but those traditional intermediaries are facing two main threats. New entrants are the first direct challenge in the music industry. In that case, we can talk about reintermediation defined further in this section. The second threat comes directly from the creators who are now able to self-publish thanks to new technologies. Independent artists can become the new centre of contracts by taking control on the value chain effectively or by threatening major labels to do so and thus increase their bargaining power (Hviid et al., 2018, p. 273). Technologies and their easy accessibility have seduced more and more musicians, introducing new approaches to the industry like Do-It-Yourself (DIY) developed in Chapter 5. Like all the other stakeholders, labels react to the changes by reinforcing their core skills and expanding their expertise. By doing so, labels encompass new links in the music value chain. By offering more consistent support, they remain attractive in musicians' eyes.

5. Disintermediation and reintermediation.

Disintermediation is central in this research as it questions the relationship between musicians and their audience. It is defined as "the situation in which manufacturers sell directly to consumers, rather than through stores" ('Disintermediation', n.d.). In the case of music industry, this process results in musicians preferring to share their music directly to their listeners without signing a label. However, what is happening with streaming platforms and

other new actors in the sector can be seen as **reintermediation**². The importance and emergence of new intermediaries concern musicians directly because the two processes affect the value chain in which musicians usually play a significant role, and so the relation with the final consumer and their scope of competencies and actions. Here, the focus is made on **rock musicians**. The history of this genre, we will see, is strongly linked with **independent music**.

In an article released in 2018, Hviid et al (2018) state that music labels and producers keep their market share inducing that the disintermediation effect is not as total as might be 'expected'. In fact, the value chain is still evolving. At a production level, the bargaining power seem transferred from record labels to streaming platforms, making those services essential at the distribution level. Still, a lot of alternatives exists and musicians can benefit from new business model like **direct-to-fan (D2F)**.

Section 3.2. The digitalization of the music industry

Music as a digital good

Previously, record labels used to talk about **a product** when referring to music because the central part of their business consisted in releasing recordings of the songs created by musicians upstream to consumers downstream. They made the link between supply and demand by delivering physical goods such as vinyl records or CDs. This music designation did not suit the musicians well as their artwork was considered a **simple product rather than artistic production**. It seemed to remove the particular dimension brought by the essence of art, but it reflected the reality of the music industry, particularly in the 80s. As a matter of fact, record labels were urged by the vinyl presses (= pressing plants) that had to turn continually and needed raw material to feed their production: songs were products (Negus, 2019).

Thus, before digitalisation, music was closely related to its most tangible means of dissemination, physical records. Recording companies were dedicated to a particular task in the production chain. Since the digital revolution has redefined music, it is not considered a product anymore and becomes **content**. Music, rather than incorporated into its carrier, is now assimilated into the information flow it represents. This major shift implies a new vision for users. Before, it was common to listen to an entire **album**. Krueger (2019, p.197) defines an *album* as a "compilation of songs that are sold together". In economic terms, albums are bundled songs, but now, songs are delivered in the preferred single format incorporated into

² It means that new intermediaries are introduced in a specific value chain instead of removing or bypassing them ('Reintermediation', n.d.).

compilations. The prevalent consuming behaviour becomes **playlists** where singles are bundled according to specific themes or contexts (Negus, 2019).

The main issue with content is the ease of being reproduced. Although it was illegal, the replication and diffusion of music for free were standard because the industry was helpless in the face of this growing and uncontrollable MP3 trend (Negus, 2019). Users indeed take advantage of this flaw in the system to obtain **music for free** and musicians also enjoy some of the benefits of this accessible and extended delivery mode. From a finite number of releases counted in number of CDs sold to an infinite content flow, they can spread their music more efficiently than ever.

Thus, MP3 disrupted the industry and left indelible marks. The question is why record companies did not react rapidly at that time. A part of the answer has to be found in the genuine definition of **disruptive innovation**. Robert F. Easley was already questioning the ethical issues due to piracy in 2005, and his description of a disruptive innovation evolution provide a better understanding of the contemporary history of this industry. First, it is developed with few means, so the product is cheap and the revenues, if any, low. Then, it is commercialised in emerging markets. Third, most consumers do not want this type of innovation initiative, so it can explain that leading companies first do not pay any attention to disruptive products (Christensen cited by Easley, 2005). This process is represented in Figure 2. It is now clearer why record companies did not react when MP3 emerged in the music industry.

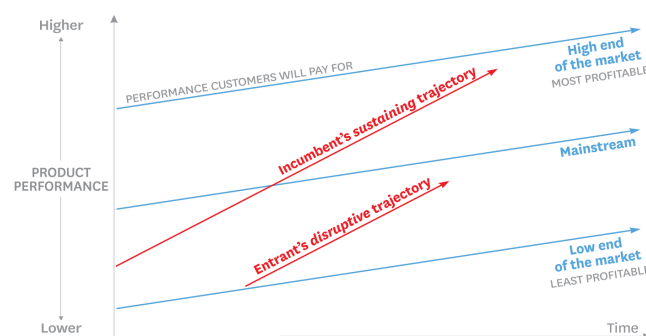


Figure 2: The disruptive innovation model (Christensen, Raynor & Macdonald, 2015)

MP3 has proved that physical means were not essential anymore to access music. There is no marginal cost with MP3 so the consumer expects music at lower price. Easiness models were soon to emerge such as Apple's iPod that is known to be the first step towards legal download services. As a result, the new preferred format became single, and a price of \$0.99 per single was set (Easley, 2005). So, referring to music as a **digital good** is consistent because

music industry is a **digital economy**³ with an infrastructure, electronic business processes, and transactions (Mesenbourg cited by O'Dair, 2015). It is unconstrained by time, place or people (Norman cited by O'Dair, 2015). Another aspect of Internet that record companies mostly neglected was that it spreads music more easily and rapidly than ever. As this change has proved sustainable, adapting business models is essential to benefit from digital means rather than undergo its drawbacks (Easley, 2005).

Easley exposes the idea of Fisher (2004) who proposed to see **digital music as a public good** with the following characteristics. First, it is "**non-rivalrous**" because someone listening to it does not prevent someone else from consuming it too. Second, it is "**non-excludable**" as it becomes difficult to prevent other people to enjoy music when it has been made available for at least one person. In reality, it is more complicated and this reflection supported the arguments in favour of copyright licensing. Music seems to be intangible information good, by nature. Legally, copyright protects musical content and economically, content creation is encouraged. However, digital music distribution is more difficult to control and requires more external intervention to prevent the misappropriation of property (piracy) because of public good nature of music with its fundamental characteristics: **non-rivalry and non-exclusivity** (Towse, 2020). To make a quick point, shift of paradigm in the copyright system is needed to ensure a fair revenue to right-holders as an incentive to create new artworks.

Thus, the matter here, when referring to 'disruptive innovation' of Christensen and Raynor (2003), is the question of business models in response to those changes than technology. In this digital economy, musicians have to find new paths to consumers, and it is to find between the two ends of a spectrum too often represented in the Manichaeian way (O'Dair, 2015). Between the DIY/independent way or signing a label, various business models are observed in the music world. Some of them are illustrated hereafter and in Chapter 5.

1. New business models

Digitalization has forced actors in the music industry to create or adapt their past business models to the new forces and dynamics present in the industry. First, it is crucial to introduce the managerial notion of the business model and its canvas. Osterwalder and Pigneur (2010, cited by O'Dair, 2015) define a business model as 'describing the rationale of how an organisation creates, delivers and captures value'. These authors provide a canvas divided into

³ A digital economy is defined by Kling and Lamb (2000, cited by O'Dair, 2015) as "goods or services whose development, production, sale and provision is critically dependent upon digital technologies"

nine blocks corresponding to customer segments, value propositions, channels, customer relationships, revenue streams, essential resources, key activities, key partnerships and cost structure (O'Dair, 2015). A business model canvas is provided in Appendix C.

Mark Fox (2004) highlights four emerging business models in the music industry. First, the radio-like **broadcasting** business model corresponds to a broadcaster who provides free music content to consumers and derives revenue from other financial sources such as advertising. The role of Spotify derives from broadcasting model. It raises the issue of music value because revenues come from other sources than the music itself. The Spotify (and Apple Music) **subscription model** operates on the basic monthly fee paid by consumers to access music content. This model has awakened 'sleepers' described by Fox as "consumers who would buy more music if it were more readily available and easier to purchase" (Krueger, 2019, p. 209). As a consequence, the listening time increases. To ensure that consumers will shift from free to paid access, music distributors must increase the audio quality that is badly perceived on P2P networks. The third model is called iTunes "**pay-per-track or -album**" and consists of defined prices for a track (single) and album. The problem is the inevitable and constant comparison with CD prices. Consumers of this new digital age are more willing to pay for music only if the price is lower than physical goods for an equivalent quality. The final business model "**artist to consumer**", where artists distribute their releases directly to consumers, results from the disintermediation as its name suggests. Music companies now focus on established artists who are the most likely to generate revenue rather than unknown talents who still have everything to prove. By reaching a smaller audience alone, small artists are more profitable by generating more significant revenues. In reality, this must be nuanced as it becomes difficult to stand out in a growing mass of artists.

Knowing those business models, Spotify can be considered as the perfect match between broadcasting and subscription models with its freemium offers. The free part with advertising as revenue source is derived from broadcasting and the paid part is based on the subscription model with a monthly fee paid by consumers.

In its publication of 2015, Cornelia Dümcke points out other emerging business models in the creative industry. First, the **Crowdfunding/ Crowdsourcing** business model corresponds to micro-financing and has been a substitute to the financial function of record labels. Campaigns happen online where promoters raise funds from individuals who generally give a small amount of money to exchange a future product. Well-known crowdfunding platforms are Kickstarter and RocketHub, and they help different creatives from musicians to writers (Bernardo & Martins, 2014).

The second business model (BM) presented by Dümcke (2015) relates to **creative hubs and co-working spaces** that consists of spaces where creators can experiment and test their innovative projects by exchanging with other creators.

In this research, the main observation that I can already make regarding this BM is that a music band needs to meet. In the case of *How to Six*, it seems that we have created a creative hubs by transforming a cellar into a rehearsal studio. There, all the members are reunited once a week to share new ideas, compositions, musical arrangements and talk about the creative project in itself, brainstorm about the band's future and our music. Since we frequently meet and have a safe place to meet, the band's project has considerably and positively evolved. This space makes sense as a creative hub because it seems to be tacitly recognised as a place of musical creation where creative expression is enriched by every musician's experience and knowledge.

Finally, the **self-publishing** business model takes part in a more general tendency of musicians pursue a more independent career as a result from the disintermediation and. It approaches the definition of the 'artist-to-consumer' model. Also, Marcus O'Dair (2015) identifies three models, halfway between the usual model via music labels and the indie path, that are **collaboration**, **collective** and **cooperation** discussed in Section 5.2.

To conclude this point devoted to the new business models of the digital music industry, I recall Ruth Towse in her article about digital and streaming music. By focusing on the supply side of streamed music, she comes to a question that is shared by all musicians who want to start a career and hopefully make a living of their art. She asks what the next profitable business model in the music industry is in the context of the streaming revolution. However, it plugs revenue losses due to piracy and cannot provide profitable outcomes for the supply side, i.e., songwriters and musicians. Indeed, the practice part of this research is based on independent musicians' experience with the interview of a young Belgian rock band, *How to Six*.

2. Datafication

Music as data

In an article about digital economy, Keith Negus (2019) explains how music, aside from being a piece of art, is becoming a piece of data. Often that phenomenon is called "datafication". This new contrast can be first observed in the aesthetic of music. In 20th music, we can hear the influences of blues, rock and jazz styles. This aesthetic is now borrowing values such as entrepreneurship, corporate culture, and the cult of personality with inspiring entrepreneurs

such as Mark Zuckerberg or Steve Jobs. The digital conglomerates do not rely on their profitability on artistic music quality (Negus, 2019).

Datafication is defined as "a broad range of phenomena through which our everyday life is tracked, quantified, and analysed to inform predictive conclusions" (Mayer-Schönberger and Cukier cited by Maasø and Hagen, 2020). So here, data refers to all the personal information available on our accounts on music streaming services (MSSs) and social media. That kind of data is interesting for the supply-side of the music market. It is part of streaming services strategy as they use data about music preferences and habits of their users to calculate revenue split. Usage data, referring to data about how users consume music (skip, repeat, where it finds the music, Etc.), can predict a song's future. It is especially interesting for stakeholders such as composers, right holders, record labels and managers (Maasø and Hagen, 2020).

Thus, for MSSs, data is the big deal. They invest time and money understanding them and are more and more skilled to interpret a broader range of data. Since 2015, data has been available for principal stakeholders in the music world (artists and label) with services like *Spotify for artists*⁴ and *Spotify analytics*⁵. Datafication really becomes decisive for interpretations and actions in the decision-making process in the supply-side of the market.

However, as data and knowledge are becoming strategic to ensure sustainability, platforms face the "**cold start problem**". At the beginning of the streaming activity, a platform that does not have enough data to deliver robust insights to the supply-side can be problematic for stakeholders demanding compelling predictions to fuel their decision-making process (Maasø and Hagen, 2020). Musicians should be aware of that issue when they decide to sell their music to emerging independent platforms.

Music metrics represent two main advantages for managers considering the long-term development of their artists and the short-term risks to mitigate. Decisions supported by data are more likely to be led. If it is valid for managers or labels, it is also vital for solo artists to closely monitor the development of their **social networks** so they can capture maximum insights. Even considering live performance, data - such as the location of audience or age and gender of listeners - is essential to plan the tour well and make the live performance the most profitable for artists (Maasø and Hagen, 2020).

If MSSs has acquired a dominant position in the race for music metrics, major labels still have their word to say. They also develop data management and interpretation skills by recruiting data analysts and statisticians to decrypt streaming data.

⁴ A software developed by Spotify for artists to receive insights about their music releases.

⁵ A similar tool developed for labels and distributors.

Two conclusions are brought by Maasø and Hagen (2020) about datafication. First, datafication is **relational** meaning that it is moving across all the stakeholders of the music business. The real power of MSSs resides in their ability to generate data. Hence, they become an "information hub" that can influence feedback loops⁶ on other players in the business such as labels and artists, in general. Those effects can be direct or indirect. Second, datafication is **cyclical**. The new feedback loops, starting with data, results in actions taken by labels. Those actions are potential game-changers and generate new data that result in new reactions that feed the entire loop. The algorithm influenced this new feedback loop by deciding which songs to make visible or not. They supply the software designed for artists, resulting in metrics on trends and top lists by sorting and ranking songs⁷. Datafication shapes the music business instead of strictly analysing it (Maasø and Hagen, 2020). To sum up, datafication reinforces a global music market instead of local development, resulting in more flawed music culture. It seems to be an excellent introduction to the next point concerning the music streaming platforms.

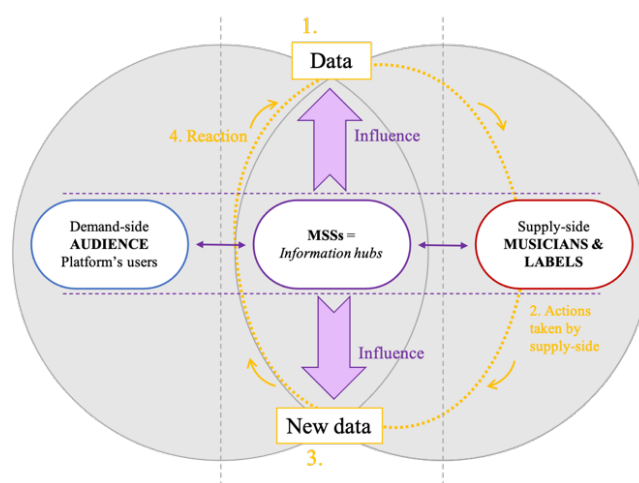


Figure 3: Reinforced feedback loops

Section 3.3. A variety of means

Music streaming platforms (digital conglomerates)

Music as a service

1. Platform nature of streaming services

Servitization of music is a phenomenon that has been induced by the technological revolution that started in the 2000s. As Marshall (2015) underlined in his article about the controversy over artist royalties, the significant shift induced by the digital revolution is a question of perspective from music ownership-based to music access-based. The consumption

⁶The concept of feedback loops is tackled after but can be shortly described as a process during which a company, here MSSs, delivers a product or service for which it receives feedback that enables it to adapt that product or service accordingly. Feedback loops generation is a crucial element of the economics of platforms as they work with different group of users who emit feedbacks and react to other sides.

⁷ Those are the two principal means used for programming interfaces

modes have substantially changed from buying music with physical formats such as CDs or downloads to renting music online (Marshall, 2015).

The best way for introducing this point is to recall the platform theory as those services meet the platform definition. Music streaming services are generally considered as platforms where different groups of users interact and exchange like in a marketplace. In platform economics, business models benefit from certain specificities inherent to the functioning of platform dynamics. There are **network effects: same-side** (direct) network effects and **cross-side** (indirect) network effects, which are crucial to understand interactions between the different groups of users around the platform. Two main groups of users interact on those platforms: labels and musicians, on one side, and listeners, on the other side. The former sells the rights of the platform to distribute music, and the latter pays a subscription or look at ads to get access to the music available on the platform. Music digital services often choose to implement ratings and recommendations systems to activate those effects. Prices on the platform are set depending on each group of users' willingness to pay, estimating with consumers' data; personal characteristics, historical purchases or use patterns (Towse, 2020).

When it comes to the platform, the question of multi- or single-homing is essential. In the current case, single-homing generates less search and transaction costs but can lead to a potential monopoly, whereas multi-homing gives more choice and flexibility to the consumer and possibly lower prices, but it is time-consuming. Logically, such services foster users to singlehome but groups from each side generally multihome⁸ (Towse, 2020). For suppliers (i.e., labels and musicians), multi-homing is essential to maximise their visibility. On the other side, multi-homing is inevitable as there exist different business models across streaming platforms. Music can also be accessed on digital radio and social media, notably Tik Tok, which seems to become a new trend maker in the music industry⁹. Krueger (2019), in *Rockonomics*, mentions this recent phenomenon giving a second life to older songs talking about 'back catalogue'.

Finally, let us make a point about the different types of platforms that exist. They can be differentiated according to the type of service they offer: **interactive** services, i.e. consumers choose what to listen to, or **non-interactive** services, i.e. pre-programmed music like music broadcasting radio. There are two significant business: an **ad-supported model**, i.e revenue perceived comes from advertising, and **subscription-based**, i.e., revenue comes from

⁸ “Multihoming refers to the possibility for users to visit more than one platform at a time, as opposed to singlehoming that describes situations in which users stick to a single platform” (Belleflamme, 2020)

⁹ A great example is the hit '*Dreams*' of Fleetwood Mac which has been rejuvenated thanks to a viral video on the app.

subscription fee; the latter is more convenient for artists and labels. Some platforms combine both models in a '**freemium**' model, such as Pandora or Spotify. Actually, royalty payment per song is more outstanding for music streamed on paid services than on free ad-based services whose revenues are lower. Fortunately for the 'supply-side', subscription-based services are on the rise. In the following points, some critical and popular streaming services are described.

2. YouTube, the digital successor of MTV?

It might seem excessive to compare YouTube to MTV, which has been a remarkable evolution in the music industry by establishing video clips as music packaging in the 80s. However, YouTube, following its creation in 2005, quickly established itself as the essential video platform and became the place to find video clips and listen to music (*YouTube, Inc. | Encyclopedia.Com*, s. d.). YouTube, being a video platform, is more generalised and differentiates from media like Spotify or Deezer, specialized in music (Beuscart et al., 2019).

Keith Negus uses the example of YouTube to explain that the arrival of streaming platforms resulted in merging two primary business models. First, the recording industry promoted artistic investment. Labels found artists from whom they produced music that generated rights and sales. Second, the streaming platform model as Youtube remunerates the artistic production according to the way content attracts advertising. The advertising revenue-generating model of digital conglomerates such as YouTube has resulted in ethical concerns. Actually, the success resides in the ability to generate flow, views on advertising. The artistic value seems abandoned in favour of a model of doubtful morality (Negus, 2019).

When talking about datafication, it is crucial to understand the two data levels generated by music and content in general. First, the music can be considered information in itself, but then the information about the music can be considered **metadata**. It is equally or more valuable by the content industry. It is essential to understand that at the centre of the digital economy resides 'big data'. In his article, Keith Negus (2019) explains that digital music generates three types of data: data about listeners to identify consumption patterns and musical tastes; data about discussions about music online are analysed to discover the most suitable terms, according to the audience, to describe music; the sonic content mentioned previously corresponds to melody, rhythm and stylistic music features in general¹⁰.

¹⁰ The last type of data is also valuable for predicting listeners' listening behaviour and adapting recommendations to suit listeners' preferences better.

The introduction of YouTube on the market and its offer model has shaken the industry. Talking about this platform, Krueger (2019, p.33) says, "Youtube became a major and controversial player in the music business". In that configuration, the supply side composed of musicians and labels still bear the risks but for a lower return on investment (Negus, 2019).

Fleisher (2017) uses the case of Youtube to illustrate the commodification of music and its consumers. Users can also access music for free so the main difference with other music consumption modes is the presence of advertisers. Here, the commodity can be music if users' attention is considered the price to pay for accessing music. "**Audience commodity**", defined by Dallas Smythe in the 1970s (Morris cited by Fleischer, 2017), refers to the fact that Youtube sells users' attention to advertisers.

3. Spotify, the successor of iTunes?

Spotify successful business model is due to two main reasons: users and advertisers love it. At a time of unlimited possibilities, thanks to technologies such as file-sharing and MP3, users are lost and generally own music in a different format. During the 2000s, it was not rare to have a CD player to enjoy a personal CD collection at home while finding it easy to download, generally illegally, music on an MP3 device and listening to music in transport or while doing sports. Music was, more than ever, available for free, but it required users to have some computer skills and was time-consuming. This negative impact on listeners increased with the evolution of legislation now punishing tougher actors of *the dark side of the music industry*: file-sharing websites.

Considering the most convenient 'legal' offer at that time - iTunes -, Spotify business model seems more interesting. The iTunes **Pay-per-track** model was an excellent response to piracy, but the pricing strategy based on single and albums looks expensive compared to the Spotify monthly fee. If a download cannot be compared to a stream (as the user possess the song in the first case), the latter is more attractive for consumers (Fleischer, 2017). Knowing this, it is normal that an Spotify offer has quickly seduced users (Trapica Content Team, 2020).

If YouTube commodifies audience, streaming platforms like Spotify offer a fourth commodification of music, **musical branded experience**, that can be added to the simple score, the recorded sound and the live performance that are all three commodities of music (Taylor cited by Fleischer, 2017). More than music, the user gets a personalised offer through playlists and context-specific suggestions. Aside from listeners, advertisers find Spotify attractive. They see in its 'free'-mium model an effective way to reach consumers. Means are diverse; advertisers

can develop audio, display and video ads. Compared to audio ads on radio stations, display ads allow consumers to click on a URL link and reach the brands directly. It offers advertisers many opportunities to reach the public through less intrusive ads played in the background (Trapica Content Team, 2020).

If the major labels were initially reluctant to these new entrants, their so-called disruptive business model seems to eventually fit majors' older model. In fact, significant labels already relied on the revenues generated by their "golden eggs," i.e. a small number of successfully signed artists, to compensate for the losses generated by the mass of remaining artists who failed (Marshall, 2015). However, Spotify is not profitable since its creation. The only way for the platform to make more revenue resides in controlling their costs, either by increasing their monthly fee or generating revenues from other products (merchandising). They may also work directly with artists and so bypassing labels. Spotify does so by partnering with DistroKid in music distribution (Krueger, 2019).

Krueger (2019) evokes a potential future for Spotify. For him, there are two options. The platform may be incorporated by another company which finds in Spotify offer a complimentary service to their business. The second scenario proposed implied labels that take over Spotify and, in fact, significant labels already have an equity stake. The problem of the second option is the unavoidable conflict of interests it implies; labels would certainly promote their artists through the platform over others. As a result, an effective way to compete for Spotify is by developing an enhanced offer and an innovative music listening experience (radio-like or star-driven music flows, for example).

4. The rise of Apple Music

Apple Music has become the Number one competitor of Spotify. Its strategy, strongly linked to the vision of Apple, is made of incomparable partnerships and the more accessible use on Apple devices. Apple Music has made partnerships with great artists in popular genres like rap and hip-hop, such as Drake or Taylor Swift, who released their new sounds on the platform primary and intervened in dedicated shows on their radio, Beats One. That radio is appreciated by users who search for a human touch in such a data-driven context. Indeed, Apple Music One Beats invite great radio hosts and tastemakers to encourage users to find the last trendy music releases on radio-styled Apple music content. Moreover, Apple benefits from a robust ecosystem of products and services and uses this inimitable interoperability to convince a growing number of users (Hall, 2018).

Another specificity of Apple Music compared to Spotify is its only paid subscription business model. Apple gains new subscribers through their vast user base of Apple devices, playing over the interoperability of their service on their devices. In the US, notably, Apple Music has overtaken Spotify in terms of market share and number of subscribers (Rowe, 2019).

To put it simply, Apple Music has solid competitive arguments. It takes part in a more global bundling strategy of Apple, its mother company. That has allowed the platform to conclude partnerships with superstars and brings it to a leading position on the US market.

5. The main issue with streaming platform: revenue

While having a full repertoire is a must for most streaming platforms to retain the maximum number of users, this negotiation situation can lead to a hold-up as the last to agree may perceive the best deal, so everybody wants to be the last. In fact, royalties are likely to be measured by the estimated revenue of an album or a track and those calculations are generally kept secret by major labels. Signed musicians generally struggle to know the real value of their digital work. So, the value of a platform perceived by the artist is based on the number of streams depending on the user base of the streaming platform and the revenue per stream depending on the record perceived value for the platform (Hviid et al., 2018). The revenue issue, here, resides in the confidential nature of some arrangements between (major) labels and streaming platforms. The latter, having a still great bargaining power, can negotiate with streaming services to promote their artists (Krueger, 2019).

Krueger (2019), in his book, states that "Streaming created a new and different type of product that is not directly comparable to physical album sales or digital downloads" (p.181). Users only need a device on which to play music like a smartphone and in exchange of a subscription fee or by enduring ads. More than mostly unlimited musical choice, listeners enjoy complementary features like playlists, curated recommendations, on-demand song, Etc. People tend to be careless with products that they do not really possess. If it true for leased cars, the same happens for streamed music, consumers pay less attention to songs than if they own a CD or vinyl of those songs (Krueger, 2019).

Regarding the economics of streaming music and specifically the Spotify case, Marshall (2015) talks about cannibalization of sales. We saw that the revenue system of Spotify and its peers appears to favour major labels because, on the one hand, those labels are shareholders of the platform and, on the other hand, Spotify's business model meet label new strategy. The revenues take longer than before to reach the main stakeholders: musicians and songwriters.

This impacts primarily smaller players, commonly known as the *long tail*, who do not have sufficient assets aside to compensate the long delay for money. The grey area is the lack of transparency of Spotify: royalty payments are undisclosed, and their analytics are incomprehensible. Comparing the situation of indie artists now and in the pre-digital industry, it seems that new disruptive technologies are conservative ones. Decisions are driven by monetary and stability. For ensuring a constant music offer and retaining consumers, MMs need to be in good standing with majors that majors still have a word to say in this new industry.

6. *General conclusions about music streaming services*

Music streaming services are the leading music consumption model in today digital economy. Their platform nature has been a disruptive technology at the emergence of YouTube, followed by Spotify. Those platforms can either be diversified as Youtube or specified as Deezer, Spotify or Apple Music. The latters compete with very similar business models: offering a sizeable musical choice everywhere, at any time. Those similarities lead the platforms to a **tough competition** where price discrimination allows them to profit from less price-sensitive segments. In the end, they can only compete on the subscription fee price and through geographical expansion. Spotify is in a weak position compared to new competitors like Amazon Music or Apple Music because it does not benefit from complementary activities shaping a strong portfolio. Moreover, ther platforms with a different business model like YouTube remain dangerous substitutes (Krueger, 2019).

According to Steve Boom from Amazon (quoted by Krueger, 2019), the music market will not balance around a winner-takes-all situation but rather, like major labels, to a **stable oligopoly** made up of dominant players. It is already the case for video streaming platforms such as Netflix, Amazon Prime, Disney+, Etc¹¹. However, it will be economically viable only if, as for video streaming platforms that differ in content, music streaming platforms succeed in differentiating from each other. Steve Boom suggests platforms to take advantage of the knowledge about their subscription base to generate extra value for subscribers. This strategy aims to increase switching costs for existing subscribers favouring singlehoming.

In *Rockonomics* (2019), there is also Mark Geiger's suggestion of another possible future for Spotify. He imagines that Netflix could purchase the company to compete on the

¹¹ Compared with video streaming platforms, the main difference between both types resides in the apparent similarity of musical offers, whereas video streaming platforms can differentiate at this level.

“bundled service revolution”. This scenario questions the revenue split if all the entertainment outputs are gathered in a single service.

Music as an experience

When looking at the evolution of streaming services since their arrival on the market, we can see that the initial promise of an unlimited and exhaustive musical flow is no more credible. Indeed, several music streaming platforms exist and find a place in such a concentrated market. The question that comes to mind is about their quite similar competitive advantages. In an article about musical experience in streaming services, Morris and Powers (2015, p.109) talk about "music streaming as **musical branded experiences**". As the omnipresence of music cannot be a competing argument, music streaming focuses on the way music is consumed on its platform. The important here is to offer smooth access to content and guide discoveries to retain consumers in their control area.

In their study, the authors decided to analyse the streaming platforms through four categories, i.e. interface, quality, identity and control. Interface corresponds to the first impression of users when joining a platform and comprises design and main features. The aim is to match their expectations the best while ensuring they stay in the platform's musical control area (Morris & Powers, 2015).

The notion of the interface is to be completed with the hidden face of the iceberg called *the invisible interface* (Van Dijck cited by Maasø and Hagen, 2020). The **invisible interface** is monitored by the platform and away from users. At that level, the platform can generally decide whether it shows content or not. It is to directly link with the tool mainly used to monitor the content on music platforms: **algorithms**. In their article, the authors mention recommendations methods such as trending algorithms which, as their name suggests, highlight the new features of the platform and collaborative filtering, which refers to the investigation of other users' music flow history in order to offer suggestions (Maasø and Hagen, 2020). The impact of those recommendations on users are consequent and question the neutral status generally claimed by platforms.

With the central role of streaming platforms in our music consumption habits, we can talk about **streaming culture**. The dynamics through the industry are all affected in their way. Music streaming services (MSSs) bring the opportunity of knowing users' consumptions habits and patterns more precisely than ever. Moreover, their recommendation systems represent both an opportunity and a threat for intermediaries like labels and managers who want the music they promote to reach the audience (Maasø and Hagen, 2020).

Taking back the article of Morris and Power (2015), **quality** is defined as the features of the service that allow it to differentiate qualitatively from others. As the initial dream of an exhaustive content offer is impossible, services count on features such as recommendation system, social network integration or curation. For example, Spotify integrated Facebook to stress its social features as users can be recommended by machines, i.e. algorithms, and people who can either be their 'friends' or playlist editors. The quality of a platform is observed through its ability to combine content. (Morris & Powers, 2015).

Here, we are talking about the quality of the service, but in the end, what matters should be the quality of music. By stating "The right music for every moment" since 2013, Spotify has changed its goal and is now moving towards sophisticated user guidance and recommendation. As a result, platforms are no more an on-demand music service but a curator which programmes music suggestion for each moment, getting involved in promotion and curation. Music is thought of as an experience offered to the consumers in exchange of analytics of their data. MSSs do not deliver the same commodity they paid for upstream but bundle it through their playlists and recommendation systems. Thus, may those platforms be considered producers? This question brings back to the notion of musical branded experience (Fleischer, 2017).

Taste corresponds to the user's musical preferences. As quality refers to the recommendation abilities, taste relates to the choices made by streaming services in terms of segmentation. The platform prioritise some music genres and styles actually. To achieve that goal, the services (like Beats, in the article) guide users when they join the platform by questioning them on their musical tastes. For example, Beats asks users to select preferred artists and genres to leverage taste information. The aim is to retain them by offering what they should want. Morris and Powers (2015) call that practice **discrimination** as the user makes initial choices that guide their use of the platform. Musical preferences are vast and, as explained in Chapter 4, depend on a variety of criteria. What is important to remember is that platform instrumentalize users' taste directly at their arrival to ensure the most efficient recommendation system from the start.

Finally, **control** means the control of platforms over users' actions. Morris & Powers (2015) analyse the flexibility let to consumers and they notice a shift in marketing as the platforms now promote their social characteristics rather than a smooth musical offer. What is valued today seems to be the social aspect and experience offered rather than the initial service itself. The control observed by platforms allows them to check and guide music uses. This advantage makes labels more inclined to streaming services.

Supporting the argument of control, the growing importance of **events** on MSSs is essential. Events such as Friday new releases on Spotify reinforce the importance of playlists and the importance of streaming services as gatekeepers in the music industry. It directly impacts musicians who want to be promoted on such playlists of great success and enormous audience. If strategic artists, who plan marketing and release to maximise their chance, can benefit to have their songs on such playlists, missing an opportunity can be a disaster. Event-driven music distribution is becoming critical, thanks to machine learning¹² and the fast-growing subscriber base of those platforms. Feedback loops between promotion and listening data are also reinforced by top-ranked playlists, which gather songs that work well. If an artist does not reach this benefactor loop, it remains in the long tail and risks never breaking through (Maasø and Hagen, 2020).

Music is becoming a **branded musical experience**. From the interface to algorithms used to create specific recommendations and playlists, every detail is studied to improve users' experience on the platform. Here, we will not address the question of hidden interface as it would need an entire thesis. Rather, it is important to understand, for musicians above all, that we are evolving in a streaming culture dictated by data. Platforms' quality is their ability to bundle content in users' viewpoint and so, the new commodification of music is playlist. For artists, it can be seen both as a great opportunity and as a weakness. In fact, playlists require to create powerful singles, 'hits' and one cannot ensure sustainable success. Musicians are asked a steady pace of new releases if they want to get known by platforms' casual users. It is even more rigorous for indie musicians who do not have their easy entries through majors. Finally, as platforms tend to acquire a maximum control over users' actions through guidance, musicians must take their criteria into account. That being said, it does not mean that their artistic output must be formatted according to those criteria. There is a huge difference between getting informed and acting. This specific will be discussed in the last chapter of this thesis.

Social media

Social media are the second fundamental game-changer brought by the digital revolution. It has profoundly impacted the way people interact and connect for the first time. Then, those successful media such as Facebook, Instagram, Twitter and now Tik Tok redefine human relations in mainly all aspects of our lives, from the friends we have to the music we

¹² According to Merriam-Webster, machine learning is "the process by which a computer is able to improve its own performance (as in analyzing image files) by continuously incorporating new data into an existing statistical model" (*Machine Learning*, s. d.)

like. It creates the concept of 'influence' by feeding a new generation of celebrities halfway between stars and ordinary people. The young generation communicates through social media, which have become the new norm in just a few years. To complete this brief introduction, the Cambridge Dictionary definition of social media can be helpful: "websites and computer programmes that allow people to communicate and share information on the internet using a computer or mobile phone" (« Social media », s. d.). Over time, they are becoming more and more powerful marketing tool for brands and celebrities, a host for advertisers. In general, they feed the new culture of users' experience.

In this thesis, the emphasis is made on one particular aspect of social media as they tend to become **powerful marketing and promotion tools for actors in the music industry**. In her paper about LA's Underground Women Musicians, Linnea Rosenberg analyses the importance of social media in such political and ideological communities. Online media are essential, and Instagram seems the perfect place to gather marginalised communities to give them global visibility permitting solidarity. Those media are the tools of the young generation to make a voice and find people sharing their interests and ideas. That is how the "Dark Matter" zine, a previously self-published and distributed zine empowering silenced misfits in the male punk scene of the nineties (Rosenberg, 2019). Instagram offers the zine of new youth with the digital promotion it allows.

Talking about Instagram, the author explains how vital this particular media was for the young female entrepreneurs she has interviewed for **self-promotion, fan engagement** and even **networking**. The visibility of those artists sometimes leads them to artistic partnerships (Rosenberg, 2019). All those concepts are critical in the current research. The music market being more and more saturated with the most unlimited accessibility, artists need to find a path to their audience and self-promotion and connection with their fan base is vital. These key elements are detailed in Chapter 5. They represent the most significant opportunity to reach consumers with live performances. Moreover, social media is an easy way for artists to transmit a message, such as Thom Yorke from Radiohead, who regularly uses social media to complain about the royalty payment system of streaming platforms (Butler, 2019).

Suppose social media represent some advantages for unknown artists who want to make a voice and reach a community. In that case, it asks for a rigorous engagement and regularity of posts if they do not want to be drowned in the mass of information that perpetually generates this kind of platform¹³. What matters is the connection they can engender with their audience,

¹³ Also, it seems essential to use all the features that Instagram offers, such as posts, IGTV, stories, polls, Etc.

engaging themselves in discussion with fans and creating a brand image of their name (Marwick cited by Rosenberg, 2019). All the work furnished by those artists is generally uncompensated and is very common in creative industries (Rosenberg, 2019).

Social media are the perfect example of the growing importance of immediate and ongoing information flow. Data must be renewed and allow stakeholders to have '**instant feedback**' by immediately knowing the impact of a post. The artist can automatically measure the impact of his or her new release or new post. Although an artist can self-promote on social media and interpret community feedbacks, they are less well-equipped than labels that employ statisticians and data analysts to dig data looking for older and historical data.

Nevertheless, real-time music metrics are the essential data even for older songs to make their come back. Music played in films or artists finding a rebirth and proliferate rapidly through the instant response of the social media users (Maasø and Hagen, 2020). Luck still plays an important role, but strategic decisions such as the release time of a post, aesthetics, attendance on social media, Etc., are all factors that can affect an artist's impact on his/her audience through social media.

The tendency of major labels working hand in hand with new players seems to get confirmed as TikTok has signed a licensing deal with Sony Music Entertainment, according to Jacob Kastrenakes for The Verge (2020). If it does not change the content substantially on the platforms in users' eyes, it is a big step for the platform that ensures access to a hit-full music collection and the label rewarding with the high rates negotiated (Phillips & Strachan, 2014).

In this point about social media, we analyzed how powerful social media can be to help artists promoting their art. However, the price to pay for visibility seems to be **privacy**. With social media, users want to enter the personal life of their stars. Artists must shape a public persona if they want to succeed in those media demanding for a lot of content all the time. However, as for streaming platforms, those media are regulated by algorithmic suggestion. They are generally obscure to understand and the only way to sustain is to offer maximum content.

Self-promotion, especially for indie artists, is vital to put his or her name on the map. It helps finding an audience and collaborating through partnerships. Also, instant feedbacks allow artists to adapt their strategy in real-time and better know their audience, their fan base. To conclude this part, it seems that the best advice for musicians is to create a digital persona on basis of a self-reflection about who they want to be in their fans' eyes. This persona will help to put the boundaries between personal and professional life even if they are generally strongly linked in the case of artists.

Chapter 4: Listeners, the demand side

In their publication of 2001 about the impact of Internet on music industry, Lam and Tan concluded that consumers would be the great winners of the change experienced by the music industry. In their view, music becoming more and more accessible thanks to Internet and resulting technologies, the consumers would have more opportunities to listen to and discover music wherever and whenever they would want at lower cost. This cost reduction is due to a minimum delivery cost made possible thanks to online distribution and diffusion. This minimal delivery cost has an impact on musical goods price which necessarily falls (Lam & Tan, 2001).

When looking at stream distribution, the volume and diversity are difficult to measure. By **diversity**, it is meant the variety of artists listened to. In the listener's point of view, musical offer has never been as large as now. It is obviously due to the main means for accessing music: streaming platforms. An increase in offer means increasing music diversity for users. However, it seems that the segment that listens to a more diverse set of music are older people while young generation, who listens to music intensively, are more likely to use **recommendations** (Beuscart et al., 2019).

This first observation leads to a reflection on the popularity of artists listened to. The difference must be made between stars and the long tail (developed in the following chapter). To put it simply, few artists are super popular, the **superstars**, comparing to the wide mass of remaining artists who are less known and so listened to. Since the possibility of global impact induced by TV and the great post-war technological developments, the **star system** have guided all entertainment industries. The music industry is no exception to the rule, people know stars. As an obvious consequence, consumers are more likely to listen to them. Casual listeners listen primarily to well-known artists whereas it seems that more intensive listeners walk on the long tail, listening to more diversified content and access lower-mid-tail artists (Beuscart et al., 2019).

Music as a secondary activity, a background

Context is, more than ever, an important factor in the musical choices made by listeners. Rentfrow et al. (2011) mainly focused on genres and specific attributes of music gives an example to show the importance of context. This example shows that a same person could prefer a particular style of music for a particular context like listening to Chopin's Polonaises when being at home reading a book whereas choosing more punchy music like rock style when running outside (Rentfrow et al., 2011).

Context-specific music consumption is amplified by the new technologies that allow to listen to music nearly at any time, anywhere. This evolution of technologies considerably impacted the way we consume music and requires the introduction of the concept of **secondary activity**. If music is background in real-life, Krueger (2019) points out that it has always been the case in films. With digital music distribution, consumers can put soundtrack on their lives just like film makers choose soundtracks for their movies.

To conclude this introduction, it is important to keep in mind what users pay for in the digital world. For Krueger (2019), consumers' priorities in 21th century are **convenience, affordability, wide variety and good listening recommendation**.

Section 4.1. A new way of consuming

Decommodification and recommodification of music, a perfect circle¹⁴

In an article of Fleischer (2017), Fleischer says "The decommodification of individual recordings (at the consumer's side), now coincides with the recommodification of music as an experience"(p.158). As a result, with offers like Spotify, users are no longer confronted with music commodities as singles or albums which represented a kind of limit in term of time spent listening to music and music choice. Listeners, in exchange of a monthly fee or ads visioning, are given a mostly limitless musical offer they can listen to as long as they want. With streaming, consumers are now used to pay for a service providing them with a large musical choice rather than paying for one particular artist's creative work. The problem with this new consumption habit is the value gap¹⁵ it creates emphasised by the lack of transparency behind non-disclosure agreements signed between labels and streaming platforms (Hviid et al., 2018).

In the music industry, the two levels of recording and retail businesses are now concentrated oligopolies. If there is still a tendency of mulihoming (e.g., consumers who use streaming to access new content and then buy physical records), it is costly. In the race for convenience and price-sensitivity, streaming wins. Consumers eventually choose a streaming platform that best fits their balance between their willingness to pay and the offer received in exchange (Hviid et al., 2018).

In the case of YouTube, we saw that the commodification can be applied to music when regarding the users who consume the content but can also be applied to consumers regarding

¹⁴ *A perfect circle* is a metal supergroup from United-State formed by members of other well-know bands.

¹⁵ It is the difference between the value expected and the real value. Here, the value gap resides in the difference between consumers' new willingness to pay (less than before) and the compensation expected by musicians.

advertisers who want their ads to be watched. In that case, the listeners become a resource of attention that advertisers buy from the platform. The listener's attention is supplied on the music market. In term of commodification, playlists are central and Eriksson refers to them as *containers*. She makes an ingenious comparison of the music industry with the freight functioning. In an intensified economy, containers are the evidence of a paradigm shift towards the sovereignty of good circulation as they serve to regulate the market (Eriksson, 2020). In *Rockonomics*, Krueger makes an interesting parallel too between music offer and a menu from 'à la carte' to buffet (i.e., user pays the monthly fee engendering zero marginal cost). Buffet-like offer results in an increasing music consumption. So the only constraint remaining in consumers' eyes is **time** and advertising is the main enemy of time as users pay with their time as they spend some for listening to ads rather than music. If the ratio ads-music seems too high, users feel like paying too much. It is clear now that consumers who subscribe for premium option **pay for convenience** (Krueger, 2019).

Thus, current consumers expect a certain level of **quality** and **convenience**. The new business models - already discussed in the precedent chapter - all try to respond to consumers' expectations while being more attractive than illegal offers (piracy). By offering a continuous music flow with high sound quality, consumers are more willing to pay as it becomes easier to access better content legally. This is a question of convenience. Listeners also best value the services which allow them to access the larger choice, regardless for the genre, the labels and former important criteria (Fox, 2004). These new expectations fit perfectly streaming's offer: **branded musical experience** refers to the control platforms have over users' freedom of action in their service. This notion represents the new competitive advantage on which platforms compete. In fact, there has been a great shift in the consumer's relationship to music that is due to "servitization" of music. Before, people who wanted to listen to music had two main options: radio - you did not choose the music you listened to - or physical media - such as CDs, bought by users who actively chose the music they wanted to listen to. With streaming services, the choice seems to be in the hand of users while in fact, it is more complicated. Users no longer own their music properly speaking, nor do they completely control their choice because they are often guided by the service (Morris & Powers, 2015).

Next to this first observation, digitalization have made consumers become more than consumers as they can be engaged in content generation process. In a publication of 2015, Dümcke showed the growing importance of business models such as **self-publishing** and **user-generated content (UGC)**. The author defines UGC as "all types of creation developed using

digital-age technologies including videos, blogs, forums, podcasts, social media sites, photography, wikis, and even eBooks" (Dümcke, 2015, p. 7/17).

With music becoming a digital rather than a physical good, the notion of **record collection** is redefined. As a matter of fact, listeners do not possess their music anymore. Before, consumers bought records and collected them on a shelf at home and could decide whether they grab a CD to play at home or in the car. The intention of consuming behind those acts seems stronger than scrolling a music application today. Back then, the listener made the choice to go to a record store to find new music to listen to. The real enthusiasts were able to stay there for hours to find treasures and come back at home with the records bought to listen to them. Now, listeners go on app which already suggests them multiple listening possibilities formed by algorithms. So, the platforms make them believe they have an almost infinite offer while it seems that algorithms make the selection for them (Werner, 2020). The listener seems more **passive** both in choices and actions than before when using MSSs.

As it will be addressed hereafter with the example of Spotify, listeners can be duped by platforms and their *hidden interface*. There are some patterns that prove that functions on Spotify such as *related artists*, *discover* and *browse*, still reproduce stereotypes of the music industry (Werner, 2020). As a result, listeners are more guided than they think and their listening choices are far from arbitrary. The idea that streaming platforms are the place to be to discover new music is questionable as they seem to be biased and users should be aware of that if they want to stay in control of your choices. Listeners who want to find a specific song or music genre generally use the *search* function. If those consumption pattern promoted by Spotify at all, it is good to know that choices are still motivated by a willingness for discovery. As our drummer highlighted during our discussion (cfr. Appendix F), streaming is still a goldmine for music lovers.

1. D is for Dangerous¹⁶. R is for recommendation

As an introduction, it interesting to define "3R systems", meaning the Rating, Review and Recommendation systems. To design a robust platform, establishing trust is necessary. We have seen that some actions are hidden - like for the *hidden interface* - and information asymmetric - recalling the case of non-disclosure agreements between majors and platforms. Ensuring that users still trust the platform from each group of users is crucial to make a business sustainable. Ratings and reviews are demanding information from users directly and are

¹⁶ Reference to the eponymous title of Arctic Monkeys on their album *My Worst Favourite Nightmare*

considered an 'information-pull strategy'. However, those first two features are not mainly studied in this thesis. What interests us here is part of a second strategy called 'information push'. The platform is an actor in the information-sharing process by interpreting users' behaviours, profiles, previous actions, Etc. (Belleflamme, 2020). Ratings, in some cases, will be addressed in the point over playlists as some of them result from ratings about best hits, week special performances or the most listened songs, for example.

In a world predominated by **user-centric** models, it remains challenging to predict users' reactions as they can change radically depending on mood, emotions and context. However, streaming platforms develop recommendation systems to best respond to users' expectations. In a survey about recommendation systems, Paul and Kundu (2019) describe five filtering techniques that are collaborative, content-based, metadata-based, emotion-based and context-based filtering.

In short, the **collaborative** technique supposes that ratings are a reliable image of listeners' future streams. It implies explicit ratings (e.g., star scale) and implicit ratings to interpret consumption data. The problem with this technique is that it depends on the amount of information available which can cause cold-start problem with a low-quality suggestion. The second, based on a comparison of **content** with user profiles, faces many issues, notably because it depends on the correctness of the item model. The **metadata** model refers to the use of metadata about songs (discussed previously in the YouTube case). The **emotion-based** technique refers to recommendations trying to match music suggestions with listeners' moods. Its strength, that is also a weakness, is the need for a great data collection allowing reliable recommendations but raising the cold-start problem. Using information about songs collected on social media like Facebook and video service like YouTube, the last technique gathers data about songs to predict listening **context**. It is mainly based on the listener's history and works well with a small data set. Apple Music and Spotify top charts are based on that technique, searching most popular songs on social media. Listener's history is a great tool to find information about short- and long-term musical preferences. This system also assumes that users are more likely to play songs they have already listened to (Paul & Kundu, 2019).

This review of the different recommendation techniques shows that, more than ever, recommendations are a question of **users' experience** emphasising the central position of the user in the digital era. However, in most cases, recommendation systems consist in a combination of different techniques. So, the **hybrid** nature of those systems must be mentioned and finally, the listener's history is an essential element in behaviour's prediction.

When it comes to recommendations on streaming platforms, the boundary between guidance and control is blurred. The most used technique is **collaborative filtering** ; the trap is running in circles, always suggesting the same songs. This negative output undoubtedly lead to a situation where only well-established artists and superstars would be recommended. Claiming to put forward smaller artists, such filtering methods can, in fact reinforce the power-law distribution (cfr. Section 5.1). Taking a look at Spotify's strategy, the company have been pushing forward playlist as its primary consumption mode since 2013 and, specifically, its playlists (rather than majors' and users' ones). Moreover, the "**zero button music player**" is undoubtedly an incentive for consumers to let the platform choose music for them. In parallel, Spotify still promotes human curation through shared playlists. This last point proves that a hybrid playlist offer remains (Beuscart et al., 2019). There are different types of guidance. Algorithmic recommendations can be both one-time personalised suggestions or continuous flow, be based on ratings or editorial. They can even be used as a search engine.

Facing the current enormous musical offer on platforms, consumers are faced with a problem of "overchoice", also called "**choice overload**". It leads to a contradictory situation as consumers, trying to extend their music collection, would like to make their own choices but find it too difficult to remember past listening (Kamehkhosh et al., 2019). Searching to know how users create playlists, the authors find that recommendation systems intervene in users' choices helping them broaden their discoveries but in the context of an active user-led search.

The study is based on a sample of university students in Germany who qualified themselves as music enthusiasts. Concerning the interface, 20% of the sample do not trust recommendation systems and do not use them.; outlining the importance of the context and purpose of listening. If it is possible to find the context-based playlist, there is no specific functionality allowing the user to mention the context explicitly in exchange for musical advice. Concerning the design, the homogeneity among tracks selected and the diversity of artists are crucial criteria for assessing the quality of a playlist. The algorithm should take that into account, but it can be subtle even tricky (Kamehkhosh et al., 2019).

Another contradictory expectation from users resides in their willingness to be both recommended with familiar tracks and discoveries. All those fundamentally opposite desires result in a mixed audience. A half is satisfied with the recommender, the other half finding no relevant tracks in the recommendations. Those findings are moderated by the actual important use of recommendations in the playlist creation process. Their aim it to facilitate listening decisions and so improving the musical experience compounded by the streaming culture of mass information. To help overloaded users, they act like a guide to surrender to, but they are

tarnished with controversial practice of platforms like the modern payola and the hidden interface. In the end, playing with consumers' behaviour turns out to be a dangerous game.

For a specific music genre like alternative rock, in this case, is the same assumption of users blindly guided still valid? In fact, those consumers seem to know what they are looking for. If they want to discover, they will use the discovery tools available i.e., recommendations and playlists. The latter being a way to find new artists but with specific criteria. They are not guided by those tools but use them **actively**; when looking at the typology of listeners described in the second section, those listeners are part of the *fan* category.

2. *Playlists. Everything in its right place*¹⁷

In *Rockonomics*, the playlist is defined as a "set of songs selected by human curation or a computer algorithm (e.g., machine learning), or a combination of the two methods" (Krueger, 2019, p.192). Playlists are indeed an essential element for music discovery (Krueger, 2019).

Maria Eriksson (2020) argues that playlists are more than "vehicles of identity-making (p.2)" but as **content carriers** that regulate the flow of goods, namely containers. This perspective of playlists allows the understanding of their distributive role and how they make the content they carry measurable and controllable (Eriksson, 2020). That being said, the financial role of a playlist is now evident as they make content, here music, commodified and quantifiable in financial terms.

A playlist can be compared to MP3 in a container perspective, as it can be the case for CDs. The main difference resides in the lighter nature of playlists. While MP3 technologies consist of data files, playlists contain compressed information about the musical content rather than the content in itself. As playlists are easy and quick to generate, platforms like Spotify based its diffusion strategy on its editorial playlists. The digital format is another argument favouring that new bundling method (Eriksson, 2020).

Content platforms exert specific control over the supply chain of music called "**curatorial power**". It can be described as the power of transforming content by organising and programming it; **platforms curate content**. The definition given is the following: "the capacity to advance one's interests, and affect the interests of others, through the organising and programming of content" (Prey, 2020, p.3). The question asked in the article is where this special power of platforms comes from.

¹⁷ Reference to the opening title of the album *Kid A* of Radiohead

First, streaming services are 'match-makers' as they intervene between different groups of players as a multi-sided platform. They are certainly not neutral but are confronted, at their launching, to the '**chicken and egg problem**', meaning they are not inherently powerful. The real challenge for streaming services is thus to succeed in gathering the different sides with whom they interact. So, by creating playlists called 'editorial playlists' (Eriksson, 2020), platforms become more than a simple distribution channel for music; they are a producer of what we refer to as "branded musical experience" (Prey, 2020).

We have seen that playlists are rightly seen as music containers, and Maria Eriksson (2020) points out the dual nature of the editorial playlists through the example of Spotify. On the one hand, editorial playlists are generally claimed by their supplier, the streaming platform, to be authentic and described as the keeper of unquestionable integrity of these new key players in the music industry. On the other hand, smuggling incidents like the 'fake artist' case happen and prove the flaws of the playlist system. To put it simply, editorial playlists have both the capacity to make order and disorder (Eriksson, 2020).

Thanks to its outstanding market share in the music market, Spotify is becoming the centre of promotional attention. There are different styles of playlists. They can be edited by users from both sides, meaning consumers and labels. However, the real hit-makers are editorial playlists based on Spotify's recommendation; its best known is "Today's Top Hits". Their playlists have a great advantage to become the central bundling on the platform; they benefit from data and the listener's history acquired by the platform (Prey, 2020). By actively guiding their users, Spotify improves its negotiation power over record labels and plays a double influence on both sides of the market. So, editorial playlists are the means to reach an audience, but if nobody appreciates them, they are useless. As they are low cost, Spotify experiments with lots of playlists to find out more successful combinations of songs and so, reducing the risk of unappreciated playlists. It is taken seriously by Spotify as those playlists ensure its bargaining power (Eriksson, 2020).

Also, Spotify put forward their playlists, resulting in musicians and labels being more dependent on Spotify curated playlists. Before, promotion efforts were supported by labels and mainly relate to the manager's professional **network**. Now, playlists are the only effective way to reach consumers, available for musicians and labels. Nevertheless, it is difficult, even impossible, to decrypt the process leading to get on playlists. Nobody knows. The fact that some releases work better than others or that equally qualitative sounds do not have the same success on playlists are a mystery (Prey, 2020). In addition, the power of luck should not be neglected. In his chapter about 'economics of superstars', Krueger brightly underlines the fact that if talent

can be amplified by scale, the power of luck is indissociable from the artistic world (Krueger, 2019).

Advertisers are also interested in playlists, and Spotify has figured it out. This observation has led the platform to develop features like "Branded playlists" that allow brands to sponsor a specific playlist for a week. Advertisers can choose which playlist they sponsor regarding the segment of users they want to reach through them. To complete their attractive offer to advertisers, they also propose "Branded moments" that correspond to specific real-time programmes which sponsors can take advantage of from their non-premium users' insights. So, playlists provide platforms with a unique control power and help them curate listeners for brands. In general, it still seems that advertisers are not very interested in features like 'branded moments', which are too specific. They generally prefer reaching the broadest audience instead of a minor, precisely targeted segment (Prey, 2020).

Knowing that ad-supported free subscriptions on Spotify are constrained by specific rules of skipping and ordering of songs, editorial playlists of the platform encourage users to subscribe for the premium version and shape the boundaries of their music collection (Eriksson, 2020).

To end this point about curational power brought by playlist generating, Spotify is effectively a new gatekeeper on the music industry and a powerful intermediary. This role was mainly supported by major labels who now seem relegated to cultural producers earlier in the industry. However, this relation of dependency goes the other way round, and it is more relevant to talk about new **interdependencies** between the major actors of the new digital music industry. If those suppliers rely on platforms power, the reverse is also true. Streaming services, like Spotify, definitely need significant support. They need their artists to facilitate their expansion thanks to well-known songs to seduce the widest audience (Prey, 2020).

However, we have seen a new tendency of partnerships between platforms and significant labels that have slightly changed new actors' initial strategy, such as Spotify. This scandalous new practice called 'playlists pitching' is viewed as corruption by the great majority. This reversal of the situation has led to the emergence of new players between musicians and platforms: **aggregators**. Those actors like CD Baby, TuneCore, BandCamp or Ditto music, to name a few, offer playlist 'consultancy' services to musicians who want to get their music played on playlists (Jenkins 2018 cited by Eriksson, 2020).

Streaming technologies introduced **algorithms** in the delivery of music to the consumer. Those algorithms are programmed to recommend musical choices to users. It is still up to the consumer to look for the next music he will listen to, unlike traditional media such as

radio broadcasting its program (Hviid, Jacques & Sanchez, 2017). However, if the consumer seems to deliberate musical choice on his or her own, the reality has changed and the reason is to be found in the expected bargaining power of platforms over labels. It seems that algorithm ensure platforms that everything is in its right place on their playlists. Looking at how it affects consumer behaviour and the forces of the music market is crucial.

Consumers' behaviour

First, **autonomous listening** refers to consumers who listen to or her musical 'stock', meaning their music collection on the platforms is composed of their favourite artists, personal playlists, and archive albums. Then, the **heteronomous listener** would be described as a user whose musical choices would be wholly guided by algorithmic interventions. In between, **guided listening** is used by two types of listeners. Consumers who listen to music recommendations are greatly influenced by their own past musical choices. So, they are not far from the type of music from their music collection. More autonomous listeners use the recommendation system consciously to visit the music catalogue. The search engine and the context-based recommendations provided by platforms help the consumer exploring a specific musical universe.

Some types of recommendations for which platforms' agency is outstanding are editorial playlists - playing the digital role of past intermediaries. It can also be seen in suggestion (algorithmically generated) and streaming flow like artists' radio and algorithmic radios (maximal agency power playlists as the listener make no choice). It seems that guidance is primarily used in a social context when music is played in the back.

A study of 2019 about recommendations and their effect on consumers' behaviours reports a certain ambiguity in consumers' expectations that are generally opposite, as we have already discussed. More than that, the article points out essential criteria for users that do not seem to be integrated into recommendation systems:

1. If some playlists are already based on the listening context of users, it seems that the purpose is equally important.
2. It should pay attention to the order of highly considered tracks by users who might rearrange them. More than suggesting specific tracks, the system can also suggest positions in a playlist for those tracks.
3. The article underlines the concept of cognitive triggers.

Some recommended items are seen as relevant for users because they might not have thought of them otherwise. This effect can be used when shaping recommendations by exerting some items' cognitive power (Kamehkhosh et al., 2019).

Maria Eriksson (2020) gives a great analysis of the effect of playlists on listeners by stating, "for users, pre-packaged playlists may obscure as much as they disclose" (p.10). Spotify new strategy encourages users to listen to playlists inducing a more passive role of listeners. Editorial playlists shape online listening (Eriksson, 2020). This trend attempts to minimise searching costs that are still seen as higher for platforms than other broadcasting media like radio. Recommendations indeed play a role, but it does not seem to entirely substitute content search and choice of listeners (Hviid et al., 2017). From a musician, and certainly a young indie musician, it is good news as the long tail is not the first choice of algorithms and playlists.

About consumer behaviour, it seems that the change resides in their role in the market. Consumers are now value creators (through playlist creation, notably) and modify the relationship between demand and supply-side, i.e. the consumers and the value producers (Dümcke, 2015). It questions the creativity and the creative behaviour that will be interesting to study in the point devoted to creative process in Chapter 5.

Algorithmic culture

The music industry has emerged in the **algorithmic culture**. Striphas (2015, cited by Werner, 2020) highlights the contradictory fact that the algorithms, claiming a democratic nature, are defined and regulated by private companies. Those companies have a strategy, and the algorithms are a consequence of it rather than an independent feature. They influence users' choices to fit with what those companies want users to listen to; it shapes social groups and attributes the value of cultural outputs (Werner, 2020).

This first vision of algorithms is quite critical but seems to be shared by many smaller artists and independent actors in the supply side of the music market. It is comprehensible as they logically want their music to reach an audience, and the algorithmic path seems unfair and only serves the purpose of the platforms. Even though it is highly criticised, it is now entirely part of the industry, and it is interesting to look at how those algorithms, in terms of recommendation systems, work.

Werner (2020) states that the "discoverability of content relies heavily on recommendations and search engines" (p.81). Taking the case of Spotify, the core idea is that music is a network of songs. It starts from observing that each song can be linked with another;

it creates a chain of songs to navigate, and links are made of similar songs: the theme, the genre, the artist, Etc. This vision ends up in the types of guidance Spotify offers.

1. *The problem with algorithms and the streaming culture, it's Not Personal!*¹⁸

The 'fake artist' event¹⁹ mentioned above has questioned the neutral status of streaming platforms and their playlist. If platforms and their algorithms manipulate music, what is the value of that music? Concerning users enjoying them, must they be considered fans? (Eriksson, 2020)

Striphas (2015, cited by Werner, 2020) explains how companies from algorithmic culture make recommendations look like "choices" of users while deciding what is valued in today's music industry. *Discover*, a feature supposed to provide users with unknown artists and songs, often suggest already known music and might make people smile when suggesting Brandy when listening to Beyoncé. This feature works a bit like *Related artists* (Werner, 2020). It seems that these kinds of suggestions offer a vital insight into the reinforced superstar effect on the platform as well.

The *Browse* is a condensation of the various guiding tools of the platform. It arranges music somewhat like it would be displayed in a store. In fact, it seems to maintain stereotypes when displaying the 'soul music' section with a portrait of a woman with an afro hairstyle, for example. Music genre classification is always based on their social interpretation, even if purely musical features still count. As a conclusion related to the three main features of platforms, the two first functions are similar in their suggestions. In contrast, even if displaying 'standard' expectations, the *Browse* function speaks to a broader and more diversified audience. For all of them, there is a common observation that listeners choice is falsely enlarged on those platforms as they are limited by guidance tool. A listener who would like to expand his or her musical horizon should seek by himself or herself, notably via *the search* function or other media, for discoveries. However, it does not translate the strategy of platforms (Werner, 2020).

In *Rockonomics*, Krueger says that "the way artists earn most of their money differs dramatically from how most fans enjoy the music artists create" (Krueger, 2019, p.10). Knowing that, we can assume that streaming is creating a **value gap** between artists and listeners.

¹⁸ Reference to the Interrupter's song *Not Personal* released on their album *Fight the Good Fight* in 2018

¹⁹ When comparing playlists to cargo containers (Eriksson, 2020), it is not surprising that such practice emerges from the new streaming culture. As for freight containers carrying illegal goods such as drugs or counterfeit goods, playlists represent a black box from which the content cannot be guessed. So, this phenomenon is likely to expand.

Streaming culture has a double impact on the equilibrium between the artists, the supply-side and the consumers, the demand-side. First, it allows artists to reach more people than ever, but that means that consumers can access a broader range of music from all around the world. Those two effects can reinforce each other as a positive feedback loop. The more widely known an artist is, the greater the success and the wider the choice for consumers. However, as consumers have a more significant offer, it can reinforce the superstar phenomenon (explained in part 4.d.) and prevent musicians from reaching any audience.

More than a greater audience, streaming provokes **disintermediation** on the supply side. The musician can bypass record labels and directly deliver music to consumers through platforms. It can result from the internalisation of activities by the supplier; here, the musicians who internalise skills of labels (Sarkar et al. 2006 cited by Bernardo & Martins, 2014). It is beneficial for both suppliers and consumers. The former generates more profits by cutting the middleman's costs, and the latter facing a more considerable choice for a lower price (Benjamin & Wigand 1995 cited by Bernardo & Martins, 2014). It comes down to the same central problem raised throughout this point about streaming culture: its implication on music discovery.

2. Sustainable discoveries?

To conclude this part, let us take the article of Morris and Powers (2015) who identified four main changes brought by music platforms that upset the industry. First, streaming services shift their marketing strategy from a focus on musical offers to social aspects of their services and differentiate on that particular point. It includes the control platforms have on the way users consume and discover music and reinvent the user's relationship to music. In parallel, data is more and more critical. Data is an extensive term that englobes music as data, data about music (called **metadata**), data about users and social data. It is crucial for the platform service to make suitable recommendations and curation but is also profitable for other stakeholders like labels who are willing to know more about consumers and are ready to pay for information. Another change is the blurred border between distribution and promotion. Recommendations are not the honest reflection of users' tastes as they also play a promotional role, not totally assumed. The last change is another blurred line between local and cloud location. At the beginning of digital music, the first revolution that faced piracy was paid download. When downloading music, even if it was a digital good rather than a physical good, the listener possessed their music on

personal devices. With streaming, music is accessible on a cloud library that is not adequately separated from users' local libraries in order to meet seamless musical flow users' expectations.

These four changes all prove that music consumption is evolving, and it seems like users have less control over their musical consumption and usage. As it is named in the article, **the branded musical experience** becomes the core consumption mode at the expense of users' control over their consumption. A last important point to mention is the **multihoming** aspect of streaming platforms. Now that they emphasise experience rather than music, users multihome and so, benefit from the possibilities offered by the different platforms.

Section 4.2. The different types of listeners

A proposed typology

In a study conducted in the Netherlands in 2010, ter Bogt et al. (2010) created a typology of listeners based on their music preferences and use. In this typology, they differentiate three main categories of listeners. First, the **High-Involved** listeners consume music for many different purposes. They use music as a mood enhancer and react emotionally to what they listen to. In short, music has a central place in their lives. Then, **Medium-Involved** listeners are also affected mostly positively by music. However, they are less involved than first category as they use music to create atmosphere and enhance their mood but still, feel happy about music and are emotionally involved. To understand the difference, the authors say about Medium-Involved listeners: "Identification with artists and listening to their lyrics were not seen as an important tool to gain knowledge of the world and help articulate a personal or social identity" (ter Bogt et al., 2010, p.156). Thus, the middle category can be comprehended as the **casual listener** in contrast to **fans** who are, by definition, more involved in music.

The final category corresponds to **Low-Involved** listeners who use music primarily as mood enhancers or create an atmosphere. They are not emotionally involved and generally do not feel positive nor negative about music. In fact, this category seems to have fewer problems to solve in their lives (ter Bogt et al., 2010). It is easy to understand that this last category, described as a tiny part of the population, is of no interest in the case of this thesis. From the musicians' perspective, it is clear that it is useless to try to involve this segment of listeners.

The study stresses two aspects of music use: the social and the personal dimension. Music can be listened to in different contexts, and so, the context will influence the music choice, and the attention brought to music when used as a social tool. In terms of size, High-Involved represents one-fifth of the population, Medium-Involved represents the more significant part

and Low-Involved the smallest (6,1% of the population). Overall, they also conclude that everybody, including Low-Involved listeners, consume music daily and argue that gender and educational level are not influential factors in music preference and music use, according to the authors. However, music taste and preferences may be influenced by the social and cultural environment of the listeners, but this specific topic is not covered in the article (ter Bogt et al., 2010). This typology is used here to refer to three main categories of listeners that can be useful to understand the segmentation of the music market. However, more precise definitions of the different types of listeners will be discussed later in this chapter.

A new typology

To sum up the different types of listeners mentioned in this part, I suggest a new simplified typology that will better serve the purpose of this thesis in the two last chapters by identifying the specific segments to target to build up an audience in the case of musicians. In this new typology, *casual listeners* correspond mainly to what has been described as Medium-Involved listeners. Older casual listeners consume music through radio and have a small CD collection composed of their favourite artists. In comparison, younger casual listeners consume music more intensively on streaming platforms and social media like Tik Tok. As older ones are likely to be influenced by what media offers them to listen to (on radio, for example), the younger generation unconsciously experiences the same consumption pattern with streaming platforms replacing CD compilations and radio still-standing hits.

The second category is composed of *fans* classified in two subcategories that generally overlap but distinguish by their prior consumption mode. First, *concert fans* consume music in live performances and seize every opportunity to see live musicians, whether they know them or not. Their ultimate goal is the experience live show provides; they want to live the music in real-time. They also see live performances such as festivals to discover new artists, which differentiates them from the second subcategory, the *engaged fans*. The latter are meticulous, have sharp tastes and think before acting, meaning that they get information and listen to artists before really investing in the art. They want to make sure they love the music. This last category mainly discovers music on platforms like YouTube, where they get an overview for free, and on streaming platforms where it is perceived as free. They pay a low-priced monthly fee for their favourite artists on the platform and benefit from costless browsing to discover new sounds. If this last category seems risk-averse, it is more a question of strategic investment. Once they discover artists they like, the listeners are likely to spend money on good concert

places; go to festivals where the artists perform, they sometimes buy their vinyl records²⁰. A good illustration of a supplier that targets, consciously or not, this segment is Jack White and his label Third Man Records, which proves that physical and digital products coexist; streaming platforms and vinyl records are again trending (Krueger, 2019). Vynils are commercialised for a niche market of music lovers, and engaged fans are part of it.

In this vision, the first category is targeted by mainstream music genres, which are generally on charts. It is greatly influenced by the superstar phenomenon and is a good customer for guidance tools on streaming platforms. The second category is more a niche segment because it is not generally satisfied by the standard offer. Their tastes are more defined, and they mainly correspond to those who usually find recommendations irrelevant, as mentioned before.

In their article, ter Bogt et al. (2010) point out the relationships between music preferences and emotional involvement across different listeners. In term of popularity, genres are ranked as follow: Pop and Urban, then High Brow, Dance and Rock. The last seems to be preferred by the Medium-Involved listeners. They also mention Richard Peterson's concept of 'omnivores' (1992) to refer to High-Involved listeners. It indicates that those listeners consume "culture favouring a broad range of high and low brow cultural artefacts" (ter Bogt et al., 2010, p.157). As High-Involved listeners correspond more or less to 'fan' in the new typology, the definition of 'omnivore' is also applicable to them.

Musical tastes, a classification tool among listeners?

Now that a new typology of the different categories of listeners has been developed, it is time to introduce the following chapter over musicians and, more precisely, young indie rock musicians. For that purpose, the definition of music tastes is crucial. It does not depend on the type of listeners, but some musical genres are more well-known by music enthusiasts, fans, like Jazz or Heavy Metal. It is characteristic of genres with music-technical specificities that are, by essence, less accessible for a mainstream public.

Tastes are personal preferences, but it is difficult to ignore the importance of the social context in musical choices rather than reduce musical preferences to choices uniquely driven by aesthetic and pure pleasure. Instead, music played will differ depending on the mood, primary activity - if the listener is on public transport or under the shower -, social context - if the listener is alone reading a book or with friends at a party. It also seems that, and even more

²⁰ It is worth being highlighted as it is quite confusing in the digital air.

for teenagers, music also plays a role of identity affirmation and facilitator for identifying with a group. In that sense, young people tend more to be influenced by an entourage to enter the mould. The list of context in which music is used nowadays is difficult to establish, and I do not pretend to be exhaustive in the few examples given above (Rentfrow et al., 2011). We have now seen that music is often a secondary activity.

To understand the following part about music preferences, it is crucial to introduce the factors of preferences considered in the study used below. Rentfrow et al. (2011) identified five main factors: Mellow, Urban, Sophisticated, Intense and Campestral that stand for MUSIC. These categories correspond to specific genres that are pretty stable over time. However, stereotypes and opinions about music genres are more subject to change over time. A good example given in the research paper about music preference factors is jazz. If we now see this genre as a very educated one, sophisticated and creative, the reception was less complimentary when it appeared at the beginning of the last century considered as uncivilised.

So, Mellow music comprises pop, soft rock, soul and R&B, Urban music is composed of rap and electronica; Sophisticated represents more instrumental music like jazz or classical, Intense is for rock and heavy metal while Campestral is made of country music, old rock'n'roll and other pop genres of that time. Those genres are defined thanks to different studies that help define categories of the genre across which people have preferences (Rentfrow et al., 2011).

If music is undoubtedly a question of genre preferences, it cannot only be summarized by this specificity. Music also corresponds to more "technical" features like tempo, instruments or lyrics. The mood can also be determinant in music preferences as some people prefer a song for the emotion it emits regardless of its genre. The last study of the paper about music preference factors focuses on whether music preferences are driven by genre or musical attributes. To do so, they use music-specific attributes like *instrumental*, *electric* or *percussive*. These emotion-oriented attributes are *intelligent*, *inspiring*, *relaxing* or *aggressive* and genres like *soft rock*, *rap*, *classical* or *Latin* music. In the end, it seems that listeners' musical choices are partially guided by genres and other attributes (ter Bogt et al., 2010).

The current considerations support the past observations about the different types of playlists available on a streaming platform. We have seen that more and more playlists are developed according to certain moods or contexts. Because people also listen to music based on emotional and musical attributes, these playlists make sense and must be exploited by streaming platforms. It points out another question that will be addressed in the practical part. If it is well-understood by musicians who define musical creations by their genre, it would be interesting to define each song in terms of emotional and musical attributes. Indeed, playlists

are a vital element for musicians, and more importantly for independent musicians, to be noticed on a streaming platform.

Moreover, as will be further explained in the musician part, independent musicians need to create playlists to put their songs in a mix of other songs they like and that are better known from the audience. Any advice given is to put their songs in playlists gathering pieces from the same genre. With the new insights about music preferences and the importance of emotional and musical attributes, musicians should also consider putting their songs in mood-specific and music-specific playlists, like *Feeling good* and *Instrumental Mental Essentials*, both found on Apple Music. Although some songs are extremely genre-specific, many albums accompany the listener in a wide range of different moods and emotions. It is the ultimate evidence that a piece of music cannot be reduced to a single attribute, that is, its genre, while it must be understood in various other factors. It is also what makes music special.

A new factor: the context

As has been underlined in a report from the Deezer research centre (Choi, Khelif & Epure, 2020), predicting the context in which listeners play certain songs is crucial for developing context-aware recommendations. Moreover, they hope that these findings will help the platform better describe playlists in their captions for attracting listeners according to the mood of the moment or the context in which they listen to music. The subjacent challenge is access to that information as it falls under the personal use of subscribers, which is considered private. Fortunately, user-created playlists represent a nest of public information. Unlike metadata about songs, playlists inform about the context in which they are more likely to be played. To analyse playlists, researchers have primarily gathered playlists' titles in a semantic framework as playlists named 'running' and 'workout' are likely to bring together the same kind of content (Ibrahim et al., 2020 cited by Choi, Khalif & Epure, 2020).

This research shows that, even with different aggregation techniques, it is difficult to predict the content of a playlist correctly and there is still work to do to improve algorithmic playlists generation according to context. What must be remembered is the importance of the context in which listeners listen to their music. If it was confirmed in the past, it seems that this tendency has been accentuated with the excellent availability of music derived from the new technologies that permit users to carry their music collection everywhere with them. That was not the case for the older generation for whom music was essentially played on the radio or on vinyl records that were more expensive in terms of purchasing power than the simple monthly

fee requested today. As music is listened to in an enormous scope of contexts, fans are even more likely to become omnivores. We can assume that a music enthusiast would like a typical music genre in a particular context. With a generally higher rate of discoveries (more eclectic, too), they actively consume artists they profoundly like and passively consume music that adapts to specific contexts.

As the last parts of this work focus on a particular genre of music - that is, indie rock music-, it seemed inevitable to make a point on the differences in terms of musical preferences to know what type of demand-side it is about (Rentfrow et al., 2011). Some musical genres appeal more or less to people in function of their gender or age. In the study, they use the example of punk which is considered as a more male-attracting genre in comparison to soul music for women and the same for electro music appeal more to young people than classic rock. Still, the study proved that, even if some differences exist in music preference across sex and age, these are not significant. Like all music genres, rock comes with some stereotypes. Maybe these stereotypes are the image given by the fans of specific genres, but it seems that it is more than that. The genre in itself already corresponds inherently to a set of characteristics and personality traits (ter Bogt et al., 2010). We will see that stereotypes in the indie scene, in any case, come from both sides of the market. Those stereotypes can even be reinforced by positive feedback loops between artists and their fanbase that recalls the new platform nature of streaming services. While this comparison may not be helpful in this research, it is nonetheless fascinating.

In general, there is a gap between musicians and their audience. The artist sees in his or her music a means of expression from an artistic and a social point of view. Thanks to artistic creation, an artist can deeply connect to listeners and create a fan base. On the other side, the listener must cope with a large, nearly infinite choice of music through which he can sometimes get lost. Music is often separated from any context and the artist's overall work. This gap can become a great difficulty for the musician to overcome when creating a connection (Negus, 2019). So, the question of whom to convince is crucial for musicians. More than segmentation, musicians need to understand the strategy they want to develop according to their vision of music and being a musician. They have to know their music and the message they transmit through it. At this level, the question is not a managerial one but rather an ideological and philosophical one, at first.

In the next chapter, we are analyzing this supply-side and focusing on the indie artists. Independency is already an ideological choice and it would shape the segment to whom they address.

Chapter 5. Musicians, the supply-side

The previous chapter described the demand side of the music market and especially the changes it has been encountering since the digital revolution. It seems to be more prominent as music diversifies its roles in society. The number of consumers on the market is also growing. However, due to the current streaming revenue system, the supply side does not feel the growth from the other side. Krueger (2019), in *Rockonomics*, highlights the number of different factors influencing the payment of musicians and right holders. It depends on the type of platforms, their business model (ad-supported or subscription-based), the number of streams, Etc.

A good 'musical' representation to understand the revenue stream on streaming platforms would be the album cover of *The Dark Side of the Moon*. Looking at the stream, the other way gives a good illustration of the money flow from listeners to artists operated through the prism of a streaming platform (the triangle being the representation of a multi-sided streaming platform). This comparison helps understand the title of this chapter's first section, which is "*A large supply to fit a small demand*". Small demand refers to the monetary aspect of the demand rather than to the number of consumers, which is quite large and still growing on streaming platforms.

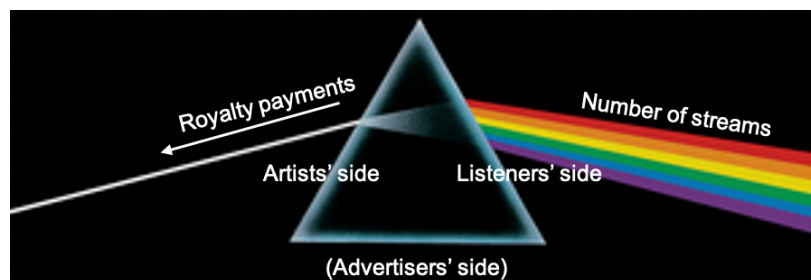


Figure 4: Revenue system of music streaming platforms

Have you ever heard that "Music was better before"? If it is a ubiquitous expression in the music world, it is a rather usual expression that recalls the well-known adage in innovation management: people will resist changing²¹. Some would argue that songs are simpler than before. According to Varnum et al. (2021), popular music lyrics are said to become simpler over time. Still, it correlated to an increasing music production. In fact, the more compressible (simple) lyrics of a song are, the more memorable (and successful) it is. Consumers tend to remember simpler songs and share them with others. This effect is reinforced by the increased number of songs on the market. In a data-dependent society, accessible songs are more effective in communication; a critical element in such an information-driven industry. **As data saturate**

²¹ This simple expression summarizes well the issue most of innovators face when trying to bring their innovation on the market and should be seriously taken into consideration (Gailly, 2018)

society, simplicity makes it possible to stand out. Those observations must be considered in the current context with music being a secondary activity. Finally, songs are becoming shorter due to the algorithm functioning of platforms²². Shorter songs do not leave room to develop the lyrics, which are, therefore, more superficial. However, when comparing popular music in the 60s and 2010, they seem longer. There is a general trend in cultural production nowadays that **prefer simpler (language) content** (Varnum et al., 2021).

Regarding previous analyses, to the question: “Who to convince?”, the answer is: **consumers**. This first observation directs attention on those new trend-makers. Musicians and songwriters should focus on them when developing their creative project.

In an article of 2004, Mark Fox raises a problem encountered by today artists. Even at a time of disintermediation supposedly favouring small artists, major labels are still important in the music ecosystem. For promotion, artists are now facing the following choice: integrating a major with all the already known disadvantages and restricting artistic liberty or following an alternative such as independent labels or self-promotion. The underlying problem is the **access to fans**. They are essential to create a solid position for artists in the industry, and obviously for young ones.

Section 5.1. A large supply to fit a small demand

Music as an art

The question of "value" is a tough one when it comes to music. Though there are some general requirements about the quality of the final product, music is primarily a question of **taste**. Talking about value creation in the music industry can become very complex, and this process also depends on the different musical **genres** (Dümcke, 2015).

In their publication of 2001, Lam and Tan already explained how the newness of the Internet was impacting the new artists. Although the Internet offered an unprecedented channel for artists to reach consumers directly, the competition was becoming burdensome for those new artists as their peers could all do the same. As a result, new artists still opted for record labels considered as experts (Lam & Tan, 2001).

New intermediaries in the music industry also help musicians to self-produce and publish. In a sense, they help musicians being more independent. Bandcamp²³ or Patreon²⁴, for

²² Streams determine artist's payment. By decreasing the length of songs, they are listened more times.

²³ Bandcamp is a music company designed for independent musicians providing them a service to sell their music.

²⁴ Patreon is an alternative way for fans to finance favourite artists by paying directly for access to their music, it can also be considered as a form of disintermediation (Krueger, 2019).

example, help artists fund their musical projects and sell them. Those platforms²⁵ play the same role that Tidal plays for greater artists who want to take back the control over their revenue stream but with independent smaller artists (The Guardian, 5th April 2015 cited by Hviid et al., 2017). Streaming platforms now borrow those business models based on fan support to offer an alternative, fairer revenue system.

About datafication, Keith Negus (2019) says that the post-recorded music industry has brought nearly **unlimited information flow**. New intermediaries are exploiting this data, and tensions have emerged about the value of music and, more significantly, how it is valued. The supply-side of the music industry would prefer a fairer recognition for their art. For them, music is more than content to exploit; it has an artistic value that should be better economically valued.

The 'post-record' paradigm has disunified the industry as musicians are less dependent upon recording revenue. The industry, more than ever, operates based on group and collaborative mechanisms. Margins becoming fuzzier, the possibilities are multiplying, which animates the emergence of new business models and strategies. The article concludes by the fact that, although shaken by current technologies, **music is an art**. So, by definition, it benefits from a constant reinvention; it is shaped and fashioned by its protagonists, the musicians, who have constantly been innovating to offer new genres, new songs, and so, a reinvented art to a demanding audience, the listeners (Negus, 2019).

Artistic values englobe **expressiveness, communicative power** as well as **social, political and experiential value**. **Art-technical, art-historical and artistic cult values** of art represent the value of an artwork to exist in a specific context and, by that, to witness an era or a movement. What artists express through their art has also a cultural value (Sternal, 2017).

As an example, Elvis Presley is undoubtedly the best example of what is called *artistic cult value* as he embodies the advent of rock'n'roll and will remain "The King" forever. The same is true for the Sex Pistols who marked a generation and succeeded in translating the counter-culture political ideology through their punk music that represents *art-historical value*.

As Sternal (2017) has concluded in her article about the entrepreneurial intention of musicians, cultural products' success cannot be limited to their economic success. In fact, it implied a wider range of aspects, such as the sense-making function of art, its expressiveness and concerning its social context (Sternal, 2017). In the end, passion prevails over profitability.

Music is more a question of passion than of economic sustainability. The musicians are generally open to sacrifice high revenue if it can guarantee them to live from their passion.

²⁵ They can be considered like this as they correspond to the definition and generally deal with different sides.

It is why the supply of that market is so unique and incomparable to the normal supply side. The problem is that only a tiny part is lucky enough to make a living from their music while a significant majority struggles (Krueger, 2019, p.52). **The main reason for dreaming of a musical career is the love of music, the passion.** As highlighted by Patty Smith, this mysterious appeal is part of the magic of music rather than an appeal for fame and fortune (Krueger, 2019).

The superstar phenomenon can question the title "**a large supply**". If the current functioning of the music industry tends to favour super artists, independent or smaller artists might feel discriminated. However, the supply side is still a large and expanding group. The contradictory effect can indeed be explained by passion. Most artists make music and try to penetrate the market because they believe in their music, in their project. They mostly make music for free, for the love of music. They hope to finally make a living of it (or not, in the case of amateur musicians who prefer to keep that statute), but the real goal is to share their passion. The technology revolution allowed a more expansive range of artists to share their music online, and many of them do not expect anything in return (Krueger, 2019).

Life as an artist is not stable, economically and personally speaking. In *Rockonomics*, Krueger recalls Billy Joel saying, "Forget about being a star or a recording artist: if you can pay your rent and make enough money to buy food and necessities of life as a musician, that is already a success" (Krueger, 2019, p.77). With streaming, comes the zapping culture that transforms music as a "single-use good" and further complicates the musicians' situation.

There are fewer trade frictions in streaming platforms than before in the music industry as music is an unlimited good compared to physical goods limited by stock and specific bundling. It allows better mixing of genres worldwide, and there is no more one dominant style in a specific country as people listen to everything, everywhere. It results in a new diversity of origins of superstars even if there is a "home bias"²⁶ (Krueger, 2019).

New music markets pressure American music, and, as a response, labels try to diversify their offer. They use social media and streaming platforms to target potential new stars from diverse locations (Krueger, 2019, p.235). It brings to the first assumption of this thesis considering that **passion prevails over profitability, and it certainly helps comprehend artistic-based industries.**

²⁶ Consumers generally prefer listening to domestic artists. National borders are essential in trade, but those borders fade with the international spreading of music everywhere.

Recorded music to promote live performance

Music as an experience

The concerts and festival industry is a serious competitor of the recorded market and is appreciated by artists as it represents more revenues. However, to ensure such higher (and fairer, in a sense) revenue, the fees paid to artists should increase, so ticket prices should increase too (Towse, 2020). Music is commodified as experience in the case of live performance. The tickets are the price tag of a live music experience (Fleischer, 2017). If a listener wants to listen to its favourite song, it is not needed to go to a concert. Buying a concert ticket means seeing his or her favourite artists on stage, sharing a moment with friends or other fans, standing in a crowd to marvel at the soundcheck, Etc. The listener pays for the global experience. It can be compared with MTV that commodified music as a video clip (and seems to be the predecessor of Youtube in offering videos).

Mark Cuban, in *Rockonomics* (2019), states that "concerts sell experiences, not only music" (p.128). Music being indeed available so quickly today, the uncommon is the unique experience provided by concerts and festivals. In live performance resides the authenticity of artists, and the demand for those events is constantly rising. The uniqueness lies in the emotional and communal experience that streamed, and more generally recorded, music cannot provide in a sense (Krueger, 2019).

When touring, musicians are aware of the unbalanced revenue generation that confines live performance to the most profitable revenue source position. For musicians, concerts pay the bill, and the lower streaming revenues will not balance that. Musicians are involved in the ticket pricing, and their managers generally push them to charge more than artists actually do when negotiating with concert promoters. The role of a **band manager**²⁷ is to guide them through their business decisions, managing the band's strategy as they generally negotiate on behalf of the band members. Top brands are also surrounded by other professionals such as lawyers, tour accountants and business managers²⁸ (Krueger, 2019).

Concert promoters organise shows by booking musicians, secure the venue and are in charge of events marketing. They generally deal with venue renting and contracting with ticketing companies like Ticketmaster. The concert industry is more professional. The digital

²⁷ The band manager can also be understood as the personal manager of a band and his/her role is to help artists build their career and advise them to reach the next step of their career (Kellogg, 2020)

²⁸ An artist's team is generally composed of a lot of different roles that are personal manager, attorneys, business manager (generally, accountants), road manager (responsible for touring and live performance), booking agent, talent agent, Etc. (Kellogg, 2020).

revolution results in better control of ticket sales criticised by some artists, and Ed Sheraan condemns it by stating, "The moment you allow a kid with a richer father to have more things than a kid with a poor father, that is just shit" (Krueger, 2019, p.140). Historically, concert tickets were underpriced because of the Rock'n'Roll socialism that wanted to make affordable concerts. With inflation, the ticket prices increased in the nineties, especially for best seats and hottest shows. As stated in Chapter 3, a band should use **data** provided by streaming platforms and social media to target places where they already have an "audience cluster". It is essential to plan the most profitable tour possible as live performance is the real revenue-generator for artists. During the troubled time of these last two years, musicians have had no chance to meet their audience at concerts. Considering the previous insights regarding the live performance, it is not surprising that the crisis has badly impacted ("long-tail") musicians.

To conclude, streaming platforms are an excellent diffusion channel for musicians, but they do not pay the bill for middle- or long-tailed musicians. For its revenue-generating power, live performance is essential for musicians and often represents their primary revenue source. Musicians should consider touring as a great way to awaken audience awareness, build a fan base (in addition to their presence on social networks) and generate revenues to invest in the next expensive steps of their career: recording.

The concept of "superstar"

The culture of superstars and the **power laws**²⁹ are reinforced by the remuneration system of streaming platforms such as Spotify (Marshall, 2015). Spotify's royalty payment model results in subscribers, who only listen to old jazz standards, seeing their subscription fee end up in the pockets of great artists like Ed Sheraan or Drake, even if they never listen to their music.

Major labels are now risk-averse, and they reduce risks by focusing on "hit-maker", signing fewer artists who are the most likely to produce hits and generate better profits. Artists have to prove their economic value for majors independently. Major labels are not developing talent anymore but seeking them. Rather than music producers, they are now brand-led marketing companies (Hracs, 2012). Krueger (2019) explains that what he calls "*The economics of Superstars*" corresponds to the **winner-take-all** nature of music influenced by: new technologies, artist's social context and the celebrity-driven culture.

²⁹ Power laws, in the case of superstar effect, explains the disproportional distribution of revenues between the small part of starts and the huge long-tail (named so because of the shape of the distribution).

Scale and uniqueness are the best ingredients for the creation of a superstar market. This combination of talent and luck is commonly called the "**X factor**" (Krueger, 2019, p.81). As the supply is more extensive than ever, the audience seems to prefer concentrating around few superstars. As a result, top performers price higher concert tickets with greater bargaining power and plan strategic touring. In the superstar economy, major labels are "superstar firms" and represent two-third of US market shares with high profit and productivity, while Live Nation and AEG dominate the concert industry (Krueger, 2019).

Another effect called "*Bandwagon*" effect explains the tendency whereby popular products and services are becoming even more popular. Music being a social activity, power laws show that musical tastes do not develop independently across individuals but rather as a social construction. Popularity is determined by social transmission. It explains the importance for musicians to become social media experts. The emergence of hits results from social interactions; people want to listen to what other people like. Musicians can leverage this group effect's positive feedback loops by convincing a few people with their songs and expecting them to spread their content across a more extensive consumer base. By doing so, musicians focus on consumers called **early adopters**³⁰, well known by innovation managers, and can create a snowball effect in their favour. However, the feedback loops can also be harmful if few people do not like them. In conclusion, quality (even if it does not guarantee future success) should be taken seriously by musicians who want to break through (Krueger, 2019).

An essential factor in this economy is the power of **luck**. It is evident that most artists are as talented and hardworking as superstars but will eventually never break through. Several factors might explain it; the wrong song's release at the wrong time or in the wrong place. For breaking through, artists must have the winning combination of skills and luck³¹. However, a place at the top does not guarantee serenity and depends on the fan base consistency. In such unpredictable situation, musicians can balance risk and reward by minimising the harmful luck effect thanks to a more diversified portfolio, not to put all eggs in the same basket. The portfolio theory suggests mixed investment to maximise the return at a given level of risk. Nevertheless, the tendency across the industry is specialization that translates into one centralised investment (golden eggs). There is a real **problem of non-diversification** in the industry (Krueger, 2019).

It is challenging to master all genres and different styles in music, mainly because of personal tastes that are essential in the art world. Taste is subjective so that some people will

³⁰ Driving adoption consists of convincing more adventurous consumers to adopt your innovation (here, a new music release and its unique features) and to influence other consumers to go for it (Gailly, 2021)

³¹ It is questionable as artists use technologies like Auto-Tune to address their flaws and hide their lack of skills.

be more appealed by a band thanks to their behaviour on stage or because they like the well-constructed bass line or even just because their song brings back memories, Etc. It is also the case for "real" businessmen music lovers, so they tend to be more specialised than diversified. If the superstar effect is not a new trend in the music industry, becoming one has evolved.

The problem with the superstar effect resides in the unfair streaming payment system. Only true stars benefit from this new system actually as it privileges power laws distributing popularity among artists. The other significant part of artists has difficulties making a living from the new revenue streams and generally have a full-time job (Towse, 2020). Superstar effects are a consequence of power laws and the scale does not seem to explain the gap between major and indie label artists entirely. Data-generating ability and bargaining power are key tools accessible to major artists. In the end, power law (i.e., Pareto distribution) represents human behaviours; they are natural phenomena (Mariuzzo & Ormosi, 2020).

In their study, the authors also realised that indie labels were only a step for musicians on their way to more profitable contracts (Mariuzzo & Ormosi, 2020). Those artists cannot be considered indie as they do not support the underlying ideology (cfr. Appendix D); they only see a way to the mainstream and conventional career path. So, the difference resides in the already-made popularity of majors that allows benefiting from the scale. However, the power-law exponent being scale-insensitive does not explain the gap of streaming numbers between major and indie albums. In fact, it appears that major artists' songs engender a better growth rate than indie ones (Mariuzzo & Ormosi, 2020).

Spotify looks like a vertically integrated business rather than an independent actor in the music market with its ownership structure. The result translates to stricter competition on the artists' side due to their downstream position. It gives majors access to more distributional channels than indie labels, which are deprived thereof (Mariuzzo & Ormosi, 2020).

It is now clear that **popularity regulates the music industry**. The Superstar effect has always existed in creative industries, but it seems to be confirmed and reinforced in the digital music industry. However, predicting this effect is complicated, and no stakeholder can claim such power in the current industry. This winner-take-all industry is partially explained by new entrants such as streaming services that have been reshaping the industry since the digital revolution. If talent and skills are valued in artistic fields, luck is also a critical success factor. With Internet, the superstar versus long-tail gap is widening.

On the one hand, artists can produce music independently (at least initially), so the offer is constantly growing over the Internet. On the other hand, new possibilities of distribution and promotion push significant labels to be more risk-averse and selective decisions. In such a

concentrated artistic industry, **luck** is indispensable. However, there remains a question: is it essential to be a superstar for making a living from music? With bands as *The Interrupters*, it seems that outrageous popularity and the end of intimacy is not yet the norm, fortunately. Several examples of "niche" music genre bands successfully pursue a musical career while keeping relative anonymity among all music supply-side.

Section 5.2. Rock musicians, a niche market?

A supply-side which does not care about the demand

First, this part about rock music is introduced by a historical background and the definition of rock aesthetic in the Appendix B. It is beneficial as it defines the origins of rock and the emergence of the independent music scene in the 70s (with punk music) until now. It introduces specific notions that might not be known by non-musicians and can guide through this point.

A **niche market** is defined as "a segment of a broader market with its own needs and preferences" (Ward, 2020). As rock music cannot be considered the mainstream music genre nowadays, we can presume that it is a smaller music market segment with its own needs and preferences.

In his article about identifying the perfect **niche audience** on Sonicbids in 2015, Derek Kortepeter explains how important it is to know what kind of artist musicians want to be. Defining their music is the best way to find their place in the industry (Kortepeter, 2015). The article is quite optimistic, stating that there will always be an audience for an artist and the natural starting point is to point out who and where they are for adapting the strategy consequently. The case of rock music is historically considered fringe music but has been spreading and now most are indifferent to its initial subversive nature. Taking the example of pop-punk, bands like Green Day has been heavily criticised for selling out in the 2000s. The new music they were producing was considered too mainstream and so business and profit-centred. It was frowned upon by punk fans and musicians. Rock music is becoming too broad to encapsulate different musical trends from more mainstream to marginal and specific genres. Here, the focus is made on indie rock music which is, by definition, a niche genre in the great rock family.

So, **the Indie rock music market is a niche market**. As it is more realistic for most of them, artists are more and more interested in indie contracts. However, as they have limited means, indie label decisions follow a work of reflection. They generally sign artists when they

are fans of their music, meaning that they prefer quality to quantity and thus, create a niche of indie rock artists in the generalist music market (Moore, 2020).

The concept of “fan”

This part aims first at explaining why fans should be differentiated from the casual listeners and how musicians should capitalise on them and construct a solid fan base. The main difference between fans and other types of listeners is the **willingness to pay**. Fans are more likely to invest in their favourite artists' music in terms of money and time. As explained in the same article, "fans place greater importance on music, are more committed and provide the most reliable source of revenue for the traditional sectors of recording, publishing and live performance" (Negus, 2019, p.12). Music is more than good or data; it is an experience. Consumers are moved by their favourite songs, and it creates a specific relationship between suppliers, musicians and performers, and their demand, the audience. Music is a natural emotion carrier, in a sense, and its particular aspect makes it profitable because it is the reason why listeners sell records and go to concerts.

The relation artist-fan is evolving and also depends on the genre of music. When looking at rock bands of the sixties, fans created fan clubs. They were more interested in the group than the individuals composing the band, with a notable exceptions being the Beatles (Phillips & Strachan, 2014). The relation evolved with the development of digital personas of musicians on social media. On social media, musicians are more personal. They can share ideas, passions, and their personalities, in general. We can suppose that artists create a digital personality to feed those platforms (requiring regular content) without alienating them for preserving privacy.

In closing, there is no unique rule concerning fans' interests. Some are more focused on artists for who they are, the values they represent and their personalities. In contrast, others are only interested in the music they create, the emotion it carries and the musical features.

In niche markets such as indie rock music, fans are cautious and alert fans who know what type of music they are looking for and the underlying values they want to find out in music. Knowing that this is the most significant source of income for musicians nowadays, it becomes relevant to conclude the non-negligible importance of fans in the artists' environment.

At the centre of innovative ecosystem: the “band”

Musicians are not lone players but work with other peers. There is a certain comradery as musicians are united by a common purpose. In the case of rock music, the standard

organisation is the **music band**. Through the lens of industrial organisation, music bands are small businesses. It seems that bands are becoming smaller. This phenomenon is undoubtedly driven by the new technologies that make it possible for a few musicians to make as good music as more prominent bands. Economically, it makes sense as a smaller workforce to remunerate, meaning more money per person. If bands are becoming smaller, there are more and more features between artists in contrast. Considering the creative process, songwriting is becoming more collaborative while recording is more compartmentalised (Krueger, 2019).

A band is composed of different musicians. This thesis focuses on the classic structure generally composed of guitarists, a drummer (rhythmic part), a bass player, a pianist sometimes and usually, one or more singers. The drummer leads the pace, accompanied by the bass, and other instrumentists like guitarists and pianists can play a rhythmic role or more soloist one like for singers. However, roles can be defined according to the contribution of each member, like songwriting, musical arrangement or lyrics (Payne, 2019). The way those members interact with one another and more managerial positions emerge from a band and even more when the band professionalises. However, such an organisational form can lack some roles but can overcome this issue by enlarging not the band but its network.

Collaborative or collective works are at the centre of band dynamics. It seems appropriate to link the profile that emerges from Dümcke's analysis and the profile of **independent musicians** (Dümcke, 2015). In 2015, O'Dair also analysed three 'new' music industry business models: **collaboration**³², **cooperation**³³, and **collective**³⁴ (see Appendix C). According to Bono (singer of U2), creativity reaches another level when the creative process is shared in a group of individuals. They all have different backgrounds, musical skills and imagination. The band's construction allows its members to share ideas and musical creations with others, and the cohesion within the band creates something new and unique that should not have existed without the band (Phillips & Strachan, 2014).

The group organisational structure has emerged with Rock'n'Roll in the 1950s. Here, the purpose is not to make a historical point about the Rock revolution as a great historical background and an aesthetic point are provided in appendices. The practice part is based on observations from the alternative rock band *How to Six*, and it explains why the group organisational structure is emphasised in this part. However, it is interesting to notice that solo

³² Collaborations refer to a financial arrangement (e.g., crowdfunding).

³³ Shared ownership enhances productivity and resilience and allows complementing skills to meet and create value through entrepreneurship in cooperations.

³⁴ It let more room for the creative process, functions in a hierarchy; equipment is not co-owned but tacitly shared.

musicians exist, even in rock and roll, and a resurgence of one-man-bands (one individual playing different instruments and often singing on its own) is observed on social media like TikTok. This trend is facilitated by home-studio software.

1. Revenue sharing across group members

When considering revenue split between band members, Krueger advises dividing revenues evenly at the band's start. The challenge faced by many musicians is the dilemma between touring a lot to generate revenue and audience awareness while maintaining creativity and cohesion within the band. What links band members are generally called their unique "**chemistry**", and it can be killed if no more time is specifically reserved to maintain it.

Nevertheless, Phillips and Strachan (2014) explain that equal sharing between the different band members can become an issue when some feel their particular contribution is not honoured to its value. The paper compares a band to a business with joint production that requires cooperation. The cooperative nature makes it impossible to precisely know which resources have been brought by whom and even to divide the final creative output properly. The band is thus a new entity that arises from the collaboration of the different members and which would not exist without that collaboration. If bands can be seen as ruleless structures, a hierarchical structure can be extracted most of the time, a specific member becoming the so-called leader. What remains essential in the two types of structure is the distribution of labour among musicians. Each member is aware of what is expected: the guitarist has to find striking riffs³⁵, or the lead singer suggests lyrics for a new composition (Phillips & Strachan, 2014).

Phillips & Strachan (2014) say that music consumers are generally committed to the music they like rather than to the individuals behind them, as already addressed. However, some bands have no leader like The Grateful Dead (Payne, 2019). To deepen that question, studying group dynamics is necessary, although it is not the specific subject of that research.

Phillips and Strachan underline three significant changes in the current music industry:

- 1) The relationship between artists and their fans through social media,
- 2) Musicians are more and more performing a multi-career path (through different collaborations, with bands or a solo career) and
- 3) Producers are compensated differently (mechanical royalties decline compared to performing rights) (Phillips & Strachan, 2014).

³⁵ In rock music, we use the word "riff" to define an easily identifiable musical pattern that generally knows several iterations during a song.

The first change makes artists more visible than before, and their personalities and personal lives might be more scrutinised. If the article sees the economic benefits, another crucial incentive resides in that bands are generally formed by friends who share a passion for music. This last aspect creates what has been introduced as "chemistry" and it definitely plays a role on luck.

To sum up, bands create unique outputs that cannot be reached by musicians independently. If the trend has emerged with Rock'n'Roll, the music groups are there to stay. Moreover, it is essential to keep in mind that the most significant part of the revenue generated by bands comes from **live performance**. Musicians can also exert benefits from collaboration with other artists, as is perfectly illustrated by Gorillaz (Phillips & Strachan, 2014).

2. *Networking. all around the world*³⁶

Networking is a must for musicians, and a great example of the power of a network is Quincy Jones. He proved his ability to renew himself and get surrounded properly by partnering with each new generation of musicians. His strategy has led him to become an unavoidable artist and producer in the music industry, financially and musically speaking (Krueger, 2019). In such a connected one, every digital channel is a potential networking vector on which artists should capitalise to make themselves a noun on the international music scene. Networking is even more important for independent artists. They do not benefit from significant labels' business and musical ecosystem and should create their network by engaging on different platforms online and participating in plenty of live events. Networking, if it can be a question of fans, is also a way to build up a multi-talented, multi-purpose and effective team to support the creative project. As for an entrepreneur starting his or her own business, musicians need support and visibility across the industry, and the best way to reach people is by networking.

Section 5.3. Independent music: what is indie rock?

*Independent music, One way or another*³⁷

Music or artists are qualified as 'independent' or 'indie' when they do not depend on major record labels (Bernardo & Martins, 2014). In some contexts, the independent music movement results from an ideal infused by the punk and anarchist movements who claimed a

³⁶ It is the penultimate title of the album *Be Here Now* of the brit-pop band *Oasis*

³⁷ It is a song from the album *Parallel lines* from Blondie

more accessible and transparent music market. The definition of indie music is intrinsically defined as opposed to mainstream and so pop music (Hibbett, 2005 cited by Bernardo & Martins, 2014).. Those movements are innovative by constantly seeking new sounds and new ways of making music far from stifling academic rules and the mainstream consumerist music industry.

In *Rockonomics*, Krueger (2019) suggests that independent artists will take a more significant part in the music market. However, the revenue issue affects more badly indie musicians inevitably.

A brief historical background is also provided in the Appendix D. Emerging from the background culture of the 70s, indie ideals have transcended generations to reach us in the form of musician-influencers who use their social networks to share their art.

At the age of Millenials, the **definition of indie music is blurred**. It refers more to an aesthetic or ideology than to a specific musical sub-genre. In an "experience-based products" culture, it seems that themes addressed in indie rock and mainstream pop music. The same is observed for the structure and musicality of songs.

In short, **independent artists claim artistic integrity and creative freedom**. This approach has been facilitated by the emergence of Internet-based software that has enabled good quality music production from home and social media as a direct link between an artist or a band and their fans, becoming a great dissemination and promotion channel. Although this path has recently been favoured, this approach asks for a great master of all those technologies. Artists must generally develop a set of business and technical skills in addition to their musical practice. All this knowledge could end up encroaching on the artist's musical career, who abandons the significant aspects of his musicianship.

Streaming platforms and indie artists,

With the ever-increasing power of streaming platforms such as Spotify, some voices have raised about the disadvantageous treatment reserved for minor players in the music industry. A series of back and forth of several labels in the catalogue of the large platform has provoked controversy about the unfair remuneration system of Spotify and similar businesses. The two main objections were: the royalty payment system that undercuts artists' remuneration (and so their careers) and the more general question about the value of music with the new micro-payments generated with streams. The question stays open about how to pay artists fairier. Spotify's answer is the scale by justifying that an increasing subscriber base will allow

better compensation. Looking at the per-stream rate evolution from \$0,002 - \$0,003 to \$0,004 - \$0,005 for the same region, their answer holds water. However, asking little musicians to wait for the number of subscribers to increase seems slightly ironic, considering that they have no other revenue for their living unlike prominent labels that have a better financial mattress compensating for this shortfall (Marshall, 2015).

Fortunately, a *wind of change* is blowing over the industry. SoundCloud has recently launched its **fan-empowered royalties system** for a fairer compensation of artists based on their users' listening. In an article of The Verge, it is reported that SoundCloud tries to "pay indie artists a share of their actual listeners' subscription fees" (Carman, 2021). This emerging business model illustrates well the reflection brought by Mariuzzo and Ormosi (2020), which concluded that the solution to the streaming revenue issue was allowing consumers to reward their artists directly.

So, the next question that comes to mind of many musicians is how to get their music played on **playlists**. According to the tips provided by CyberPR³⁸, artists have to figure out the algorithm-based nature of Spotify to hope to reach one of their popular playlists. First, they admit the importance of **multihoming**. In fact, artists cannot put all their eggs in one basket in terms of the marketing plan. They must upload its music wherever it can reach an audience: social media, other streaming platforms, radio stations, live performance, Etc. Then, they must construct their narrative to take advantage of the momentum if they are successful. Social media are essential to keep a solid fan base. Some music bloggers create curated playlists on Spotify, so it is vital to get known by them. Spotify also values consumers' engagement, so artists have to be influential on the platform. Also, artists can be active actors in their releases by creating and sharing playlists containing their releases with similar better-known music. A unique playlist POV (point of view) can help your audience understand your personality as an artist. An artist's mailing list is a crucial point for reaching success. If an artist has a great community, they can ask them to follow his or her Spotify profile. This engagement can be a game-changer for artists who have already developed a substantial audience and contact ecosystem (Hyatt, 2021).

Social media, artist-fan engaging relationship

Rosenberg refers to social media, and particularly Instagram, as a showcase for female artists of the underground scene. Those artists use Instagram for **self-promotion** and **self-**

³⁸ CyberPR is a company that specialised in developing marketing strategies for musicians.

branding. Though it is rewarding regarding visibility when the social media is intelligently handled, it is time-consuming and for free. It is considered a DIY approach to an artistic career as the artist handles the communication and marketing parts of their career development. Instagram can be used to share their personal life and promote professional projects (Rosenberg, 2019).

With all these considerations in mind, it is essential to understand that the DIY approach of musical career development is, above all, a question of balance. To manage the right fan engagement level and built a well-perceived and robust brand image, an artist must be aware of all the implications of his or her virtual persona (Rosenberg, 2019). Moreover, as those social media are known for their continuous flow of new information, some complementary parameters must be considered if they want to have an impact; for example, the time they post something new, the different features offered by Instagram and other social media, the complementarities between platforms and how to master them, Etc.

Those parameters are decrypted in the following section to confront *How-To Six's* band members' novice opinion. The aim is to understand the critical role of social media in the development of indie musicians' career development and question if some practices or feedback from social media development can impact the creative process of young musicians.

Music entrepreneurship

1. Music as a business project

According to the representation given by Derek Sivers, the founder of CB baby, a **music entrepreneur** is a musician who wants to help musician colleagues while keeping the right balance between the creative and business sides of their career. Nevertheless, this definition putting the economic value at the centre of musical creativity is not shared among all (Sternal, 2017).

Taking a look at the different definitions of entrepreneurship through different fields of study such as sociology, psychology or management, the common point is the intrinsic notion of **creating value** linked to entrepreneurship definition. **Artistic value** suggests more than one definition and must be studied through the lens of different fields. Thus, it is crucial to understand the **motivation** underlying an artistic project, career. Frey differentiates intrinsic motivation, guided by a vision giving meaning to his work, and extrinsic motivation, driven by the economic value the artwork can represent. Bryant and Thorsby consider this distinction telling that the former make artists aware of the cultural value of their work.

In contrast, the latter helps them consider the **economic value** of it. The important is to create a link with the audience within an economic context meaning that value is the result of a good combination of creative content supplied by artists and the audience appreciation. Entrepreneurs must be aware of the world they evolve in, and music entrepreneurs do not deviate from the rule (Sternal, 2017).

The value creation occurs through the **value chain** that can be described in five main steps: creation, production, dissemination, transmission, and consumption. The circular aspect of the music value chain is crucial as musicians need feedbacks from their audience (concerned by the two final steps) to know how fans perceive their art and journalists and critics (Thesis57). During the music production process, musicians evolve with the same idea in mind: how to make a song that is worth it, convinces the audience, is a pride for the band and obviously, how to make a song that works (Payne, 2019). During this continuous decision-making process, musicians are constantly confronted by their doubts and must deal with them to make proper decisions. It is a more strenuous job for independent musicians who encompass most of the roles in the music value chain.

Artists are bored by the economic aspect of their career and chose to concentrate on the artistic part delegating the business development to intermediaries. Those cultural workers, such as producers, managers or record companies, play mediators between artists and their audience. Holden (cited by Sternal, 2017) stresses that the role of the audience has great importance when considering cultural industries, and only focusing on the supply side would be to discard an essential key of understanding. A direct consequence of those changes is the payment to the suppliers namely musicians, songwriters, music producers, Etc. In her article "Dealing with Digital. Economic Organization of Streamed Music", Ruth Towse analyses the case of the Norwegian music industry (Towse, 2020).

In economic terms, songwriters can be seen as **upstream entrepreneurs**. They invest their time and talent in the music creation to finally result in payment if well-executed and thriving on the market. This payment is a contract negotiated with **downstream users** appearing to be primarily publishers. With digitalisation, contracts grow in complexity and rule on who has the right to decide how to use the content produced. Their publishers negotiate streaming royalties and the role of copyright and its implications on contract agreements should ensure the fair share of music revenues and should include the streaming revenues, but it does not seem to be the case yet (Towse, 2020). With the last two points, it seems that entrepreneurship is a question of personal drive to create value and the audience's reaction to the artwork creating that value.

In musical terms, we can say that a music entrepreneur requires internal motivation and a good perception of what is valued by the demand side. This last feature is generally delegated to intermediaries in the classical value chain of music; the musician acting as an entrepreneur integrates the business aspects of his or her career into its practice instead of dissociating it from the artistic part.

More than artists, **independent musicians** must develop a plethora of other skills. In fact, noncreative activities represent the most significant part of an independent musician's life. This shift is well represented in the figures of the article of Hracs (2012) (Appendix E). Important noncreative tasks comprise booking, raising funds, promoting online, Etc. From a "bohemian", artists' lifestyles evolve to the entrepreneur profile who masters legal, financial and management aspects of his/her musical project. The notion of creativity certainly evolved with this shift and may lead to the situation of de-specialisation and multitasking (McRobbie, 2002 cited by Hracs, 2012). Suppose the barriers have been lowered for this wide range of new independent artists. In that case, the competition is more challenging than ever, and the music business has become a risky and uncertain environment.

The online reality of artists reveals undoubtedly a part of their true personality as they are generally inhabited with solid values that led them to follow an independent path. Still, each person can see one personal account instead as a professional account displaying their work or a social space to share ideals and lifestyles with an intimated audience. The difference remains in the degree of emotional implication those artists are willing to access through social media (Rosenberg, 2019). Rosenberg points out the importance of the **entrepreneur profile** in the specific case of alternative music communities. By developing their fan base online through social media, musicians, through their **digital persona**, have to demonstrate a strong **self-implication**. The time allocated to their online mission is not remunerated as it helps strengthen fan engagement.

2. Music entrepreneurs' personality

In his article, Paul Loeb van Zuilenburg concludes that it is primarily a question of **inner traits** (even if some aspects can be learned and integrated). Not everybody can become a music entrepreneur. Introducing the notion of entrepreneurship, the author quotes Patti Greene when she says that "entrepreneurship with a big E is how to live your life" (Beckman, 2007 cited by Van Zuilenburg, 2013). Adding to this statement is the definition of "art-entrepreneur" as motivated by intrinsic creative drive and extrinsic contextual and business motivation (Henry

et al cited by Van Zuilenburg, 2013). Thus, some aspects of individuals' personalities seem crucial if they want to run a successful business independently. The study concludes that, in the specific case of musical endeavour, a music entrepreneur should be committed, motivated, determined, courageous, self-reliant, able to network, lead, and search for opportunities. With those abilities comes the necessary self-confidence and risk tolerance. The article provides a typology of those personality traits presented in the form of an inverted pyramid shown in the following figure.

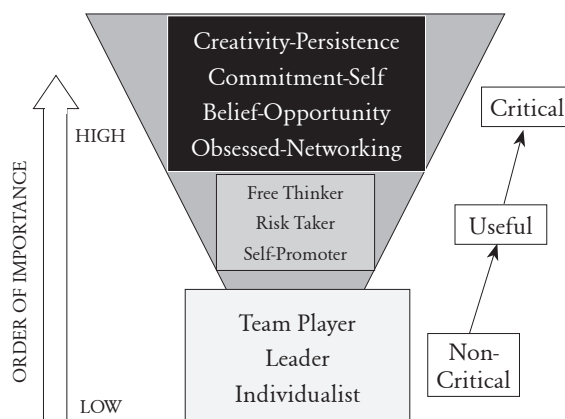


Figure 5: Typology of music entrepreneurs' personality traits (Van Zuilenburg, 2013)

3. Creativity in music

In *Rockonomics*, Krueger (2019, p.57) quotes Patti Smith, who says about the creative process: "The artist seeks contact with his intuitive sense of the gods, but in order to create his work, he cannot stay in this seductive and incorporeal realm. He must return to the material world in order to do this work. It is the artists' responsibility to balance mystical communication and the labour of the creation." Even if it may seem too mystical, it reveals how an artist is emotionally involved in his or her creative process, in general. Behind the artistic creativity, it supposes, the musician who creates is a creative individual and shares common characteristics with business creatives and entrepreneurs.

To make a point about musical creativity, two perspectives should be considered: **individual perspective** refers to how and why a person is a creative and **collective perspective** analyses how creative processes are influenced by feedback from their environment. In the first perspective, the author uses psychology to understand why some individuals are more creative than others, describes a **creative personality** as a combination of openness, an intrinsic motivation to create and environment factors. The second perspective focuses on more complex creative works. It studies creative performances that require a group of contributors, a **creative team** in a way. As previously mentioned, people will resist change.

Even in a creative team, each member must learn to deal with others' feedback and attitude, and those can be tainted with doubt and resistance. To overcome it, creative ideas need to be pretty balanced between novelty and effectivity. Innovative ideas are, by essence, unusual, but they must remain appropriate. It is due to the inescapable social drive of creativity (Schiavio & Benedek, 2020).

Creativity is situated at different stages of the musical creation process. The same patterns of creativity are valid for composers who are included in a cultural and social context, and the musical practice also relies on interactions between individual and collective factors with constant adaptation and negotiation (Schiavio & Benedek, 2020).

To ensure excellent musical outputs and good interaction among the organism (musician or group of musicians) and their environment, musicians have to trust each other. Creativity is generally constrained by the genre in which the musicians perform. During a live performance, musicians often have fun rearranging their pieces, but they must keep in mind a certain coherence within the band and style. There is a natural balance of freedom of creativity and boundaries of genres. However, those boundaries are not impervious. Thus, **creativity in performance** is not limited to individual actions but generally results from the interdependencies of the musical system (van der Schyff & Schiavio, 2021).

Understanding the equilibrium between an organism and its niche is accepting the tricky balance between renewal and conventions. It means that musicians in a specific genre, for example, are asked to produce new and innovative songs that stay in the scope of this specific genre. The article talks about "**skilful adaptation**" when describing musical creativity (van der Schyff & Schiavio, 2021, p.17).

Approaching an artwork or artist with a **product-based perspective** is observing the musical outputs produced. There are two types of producers here: **adaptators** who make novel use of existing ideas or products and **innovators** who develop new, unprecedented ideas that impact their environment (van der Schyff & Schiavio, 2021). The thinking process is often associated with a state of **flow** comprised of a mental state reached by highly concentrated people immersed in a specific activity (Csikszentmihalyi, 1997 cited by Schiavio & Benedek, 2020). So musicians are entirely immersed in their musical experience.

Approaching an artwork based on **the process** is observing the artist, considered as the creative agent. Thus, a musician is *preparing* through instrument practice, *incubates* everywhere and at all times, he can eventually be *illuminated* by an artistic idea that he will test later (*evaluation*) (van der Schyff & Schiavio, 2021). Sometimes illumination can go beyond

the technical possibilities of the musician, so he will have to practice; sometimes, he thinks outside the box and must adjust his idea to fit the fragile balance organism-world.

More than interactions between humans and their instruments are part of the creative processes; the social context is central to understand the creative process and its boundaries by taking the audience into account. Live performance is supposedly a unique show that can be different from one concert to another, and it proves that musical creativity is socially and technologically distributed (van der Schyff & Schiavio, 2021). Jimi Hendrix is an excellent example of that as he played the guitar with his thumb to compensate for the lack of a second rhythmic guitar in their 'power trio' type of band. In short, the creative process allows the creative agent to develop new patterns with others through new techniques and affordances of his/her instrument. It may first conduct to uncomfortable and uneasy situations for everyone, but the new instability must be discussed and negotiated to find the next right balance of freedom-constraints (van der Schyff & Schiavio, 2021). Such a process comes with risks and learning necessities corresponding to contextual know-how and knowledge, but musicians, such as entrepreneurs, must overcome them to reach another level of professionalism.

4. *Independent musicians, free as a (black)bird³⁹ ?*

Now we have seen how creativity is more than a personality trait but rather a continuous engagement to the world (Schiavio & Benedek, 2020), the next question to ask is what degree of freedom in creativity the musicians still benefit from in their compositional process. And more specifically, in the case of rock music.

First, it is important to mention once again that people will resist change. If this adage borrowed, among others, from innovation management may seem simplistic, it still seems to be true for the creative endeavours of musicians. Musical creativity is so-referred to as the ability to find the right balance between musical innovation and acceptable changes for a specific environment. In that sense, we can think that creativity is trapped in codes that the audience expects from the musicians to perform. The audience's reaction must be nuanced, and the release of the last Arctic Monkeys album, *Tranquility Base Hotel + Casino*, is a perfect example of the double dynamics experienced by the rock scene in general. The sixth album of the British rock band has surprised and disappointed, but the music critics praised them for the new turn they have taken that makes a logical continuation in the evolution of the group, in a sense (source).

³⁹ In reference to two Beatles songs *Free as a bird* and *Blackbird* both evoking freedom in the broadest sense.

This warm welcome from the rock music world is undoubtedly due to a fundamental aesthetic aspect of that genre: stylistic eclecticism. The latter must surely invite to rock musicians certain freedom in their creative process compared to other more "coded" genres such as rap or classical music. The response must be nuanced; though the creative process responds to its social environment, rock music has its particularity that seems to allow more risk-taking and other genres exploring.

Section 5.4. Hypotheses about musician's experience

It is now time to expose my hypotheses concerning young rock musicians' place and role in today's music industry. To introduce them, I quote Krueger's notion of "**disconnect**", making musicians "multi-product businesses" (Krueger, 2019, p.38). This disconnect resides in the fact that musicians' tangible good, records, do not represent their primary source of revenue compared to actors in other creative industries. A disconnect exists between how consumers listen to music and how musicians earn money. Nevertheless, according to Krueger, the link between live performance and recorded music will narrow, thanks to streaming and social media. Technology can also help reduce the gap between live performance and recordings. It would make sense for fans to pay for products derived from live performance, and there would be opportunities for live-streaming (Krueger, 2019).

After this great sum-up of the different benefits and threats introduced by new technologies in music streaming, I am formulating the following assumptions:

1. Streaming platforms are the primary way of distributing music online.

However, live performance still plays an integral part of the distribution process with better remuneration, especially for unknown "little" indie musicians. Indie rock musicians should prioritise live performance for revenue generation and use streaming platforms to showcase their work without expecting fair compensation.

2. Social media are used to promote and disseminate music.

All indie rock musicians require solid social media with regular updates of their musical projects and career and more personal information to create a strong relationship with users and so, create a reliable fan base.

3. New indie musicians are entrepreneurs.

Musicians should rather correspond to the entrepreneur profile or consider surrounding themselves with entrepreneurial people in their core team if they want to pursue an independent career.

Chapter 6. Discussion and conclusion

At this point, it is essential to recall the specific methodology applied to the current research. This practice part is based on my observations as a researcher-practitioner in the different musical projects I am involved. The primary resources exploited to confront theory at this stage are my personal experience as a musician (*Maun*), my observations about our band *How to Six* and a discussion that took place on the 7th July 2021 that aimed at collecting the viewpoints of the band members regarding my research as well as gathering our comments already shared in past informal team meetings. The transcription of this discussion is to find in the Appendix F.

As a reminder, our band is composed of two pianist-singers (myself included), one bassist, one guitarist and one drummer. In the continuation of this work, the interventions of each will be mentioned by their (musical) role in the band to facilitate comprehension without mentioning their names.

Section 6.1. Discussion about hypotheses

Discussion

1. About streaming platforms

As young musicians, we will undoubtedly post music and clips on **YouTube**. Even if its business model does not financially reward us, it is an excellent channel to reach music lovers and get our music discovered by a more extensive user base. So, we arrive at the same conclusions as Aly-Tovar et al. (2019) that explained that artists should favour free streaming, at least at the beginning (Appendix G).

We know that as soon as we will have some music ready to be broadcasted, we will go through the **streaming platforms** to distribute it and reach an audience. Also, we will take advantage of the complementarities between promotion on social networks and distribution on streaming services; we can put Spotify links on our Instagram stories, for example. However, a work of reflection and investigation is necessary to know how we will reach streaming platforms (certainly through an aggregator like CDBaby for the first time, but we do not know which one yet). There are some blurred lines concerning the general agenda and our **releasing strategy**, but we would like to have three songs produced by the end of this year. The aim is to

make them available on streaming platforms at the beginning of 2022 and plan our 2022 summer tour. Concerning the general calendar, it must be more precise for September.

We are rock musicians, so by definition we love listening to entire albums. However, the music is now bundled as playlists so we have to keep in mind to produce striking singles even if, in the end, they integrate into a more extensive work as an album. Also, release dates must be strategic as platforms features are now event-driven and mood-focused. These are some of the things we need to think about, bearing in mind that those rules are no 'mandatory'.

Finally, we know about streaming unfair payment system, but we hope that it will change as seen with SoundCloud. Although platforms seem to be a financial chasm for musicians, our drummer underlines the creative drive emerging from those new models. He gives the example of Vulfpeck, an American funk band which, in 2015, encouraged their audience to listen to soundless musical tracks at night to boost their revenues and finance their next actual music project. This example is evidence of the innovative power born of perilous situations and might hide entrepreneurial motivations. Although it will not pay the bill, streaming platforms are the place to be as a young musician, and we will do our best to get played on playlists. While we recognise the importance of building a launching strategy, the question will arise in due course.

2. About social media

I use Instagram primarily for my activity as *Maun* because the musical format fits well the platform. YouTube may fit best but it made no doubt for me that Instagram would be more rewarding for visibility than YouTube. I plan to re-post all my releases on YouTube in a second time, as I made with Facebook during March. To be honest, I see Facebook as convivial family-and-friends-focused social media rather than a diffusion and promotion channel. Looking now at *How To Six*, the main channel to reach an audience is also social media, particularly Instagram. They also allow our public to feel closer to our band, notably by seeing behind the scene, they can feel involved in the project and learn about the our personalities, for example.

We share a common vision/opinion about social media in *How To Six*: it is a necessary evil. We are not huge fans, not even intensive users of such platforms, but we all agree that it is one of the two main channels to reach an audience and raise awareness about our brand, the second being live performance. For us, there are as many positive as negative impacts, so we will do our best to benefit from their advantages and stay away from their drawbacks.

Though unhealthy aspects are forms of exhibitionism and voyeurism underlying social networks, our drummer pointed out two positive points. First, it gives us the **choice** of what we

will post, say, show, which was not the case in the industry before⁴⁰. Second and as a consequence, it reduces the work of paparazzi⁴¹. Our singer added that social media could also be helpful to share a message or an opinion more efficiently than before. All those positive aspects summarise the use we want to make of social networks: getting closer to our audience, sharing what we want to share about our musical projects and sometimes personal life, sharing important messages and opinions if needed; and all this without feeling forced.

However, we are not social media experts and do not want to become more technical. Now, I am the member in charge of our social media as my personal experience with *Maun* has helped me to understand some functionings and algorithmic tips on Instagram. Nonetheless, my only goal was to post music every day, and the communication and promotion around the project were a necessary constraint. So, as long as it will be needed, I will prepare, plan and post content on a maximum of different social media from broader ones like Instragam, Facebook and even Tik Tok to more specific ones like musicians-focused platforms (Court-Circuit in Belgium, SoundCloud, Bandcamp, Etc.). If our budget is large enough, we will like to have a community manager outsource this task that sometimes feels like a constraint.

To conclude, those observations about social media seem to coincide with the findings of this thesis. Musicians see social media as the main channel for music promotion with live performances. However, there is still work to be done regarding the agenda (regularity of content). We have to discuss our "editorial line" to achieve some consistency across our different social media.

3. Musicians and their audiences, all consumers

The first observation, as listeners, is the change in our consumption patterns. Now, people listen to playlists rather than albums. All members agree that playlists and recommendations are great for discovering new music; opening to the unknown. We also noticed that the general music consumption has taken off with streaming and easy accessibility. During our discussion, all the changes of the music industry has been mentioned again like: music as a secondary activity, the ease of access to music, the enabled music discovery, Etc. Those are comments of consumers and first and foremost music lovers before being musicians.

Looking at the negative points underlined during our meeting, the decline in listening per album is accompanied by a decline in listening per artist, which suggests that consumers are

⁴⁰ He illustrated it with Freddie Mercury whose sexuality had been revealed through a press conference.

⁴¹ if fans want to know where your favourite star went on holiday, they can go on his or her personal Instagram account rather than looking for creepy undesired pictures in tabloids

disinterested in the person behind the music, the musician. Moreover, music being a secondary activity, it is generally played in the background, and as a result, consumers pay less attention to music.

As a band, our first intention is to create a unique link with our audience. This relationship can partly build up on social networks. We can reach our first **fans** and even **engaged fans** (according to the new typology). However, we firmly believe that the link is achieved on stage when sharing an experience with our public. We are undoubtedly live musicians above all. On stage, we can share emotions, messages, convince rock enthusiasts and most importantly, convince **concert fans**. Streaming platforms are commonplace for our fans to find and listen to our music easily. It is also a place to find **casual listeners** who can be a game-changer in terms of streaming revenues if we succeed in making a 'hit' or, more realistically, get playlisted. As our drummer said, We can expect that other people, potential audiences, use social media in the same way if we use such media in that way. The aim is to put our music on their discovery path. It is the current main challenge for indie artists.

4. About live performance

How to Six is a live band. If studio times are enjoyable, we are looking for the stage experience and contact with the audience. Our band has begun with cover music concerts. The live aspect is entirely part of our identity as a band. If songwriting and recording are essential aspects of our creative process, performing our songs live is a sort of an end in itself. For many musicians, including our band, consider opening the concerts of best-known artists is a great way to start. When shaping the strategy of *How To Six*, opening concerts is one of our objectives.

During our discussion, the guitarist pointed out that if we want to kickstart the project, a solution is to find in partnerships with greater musical organisations like festivals or opening bigger artists' concerts. Those examples are live performances, and our guitarist said that there are two main channels: social media to raise audience awareness and live performances to retain popularity. What matters behind opening other artists is the image perceived by the public. They might think, "Our favourite band likes them so that I may like them too".

5. Being a musician

As musicians, new technologies have elevated the level of freedom as it has enabled **home studio**. However, the perverse effect is the general reaction of saying "everyone can do it",

which takes away the credit for the profession of musician. Moreover, the revenue system of streaming platforms is a significant issue for musicians like us who try to develop an independent career, at least for a start, because we already know that we will not be rewarded equal to the work provided. How are musicians supposed to sell their music? What does it mean to be a musician in today society? Those are shared questions that regularly come up in our discussions.

When asking what it takes to be a musician, our drummer summarised his definition of a good musician deriving from his observations of musicians since the advent of Rock'n'Roll. According to him, the recipe has not changed since the Beatles. Thus, musicians should have **something to say**, a **public image** matching societal expectations and an excellent surrounding **team**. Their music should also break with their time, generally by challenging society and its standards to those three core features. Those requirements, he said, are not about to change. He gave the example of Punk Rock and Progressive Rock, two opposed musical movements that emerged from the same break. He added that music has its particularity that as an emotion carrier, it creates a unique relationship between musicians and their audience, their fans. The guitarist moderated the first requirement. For him, if a musician does not have anything to say, he or she can create it.

The drummer said that being a musician today means to be multi-talented, most amateur musicians do not consider this essential aspect seriously. On the other hand, we can find "I write music in 20 minutes" videos on YouTube, and we wonder what the value of music is today. We could conclude that music only serves to fill/deceive the silence, which is a quite pessimistic. In contrast, our guitarist explained that a pro had to manage more skills than before and could no longer be satisfied with his/her only mastery of an instrument. Our bassist emphasised that music needn't be pro to be played. As for sports, it is a passion above all and should stay so. It brings us to the same conclusion as in Chapter 5, stating that passion should prevail.

6. Being a band

The band is a new entity which arises from the collaboration of the different members and which would not exist without that collaboration (Phillips & Strachan, 2014). It cannot be more true for our band. When playing together, something bigger than us emerge and we feel a new 'magical' vibe. Moreover, we have pretty healthy group dynamics (Payne, 2019). Having two psychologists in the band, I guess it helps.

In *How to Six*, no one has a stronger position than others, which may suggest a unique leadership. Nevertheless, depending on the band's projects, a leader naturally emerges within the band to motivate and lead discussions. Now, we are conscious about it and regularly discuss the inherent functioning of our band to leverage the benefits from that natural **shared leadership**. It does not mean that bands should always work in that way, but we think that all members should be in an equal position in discussions and in the final decision-making process.

7. Independent musicians and Entrepreneurship

We consider our music as *indie rock* mainly because of our influences (punk, alternative, progressive, indie rock, Etc.) and our intentions. We want our music to be ours only; it looks like a statement of independence. Nevertheless, we do not want to do everything by ourselves but we want to control our creative process as well as our images, for example. That does not mean that we are not open to external suggestion on the contrary, we just want the final decision to be ours. Independency is also a claim of a specific ethos and some of us are sensitive to political and societal values (Sternal, 2017). However, in our bassist's opinion, we should not do everything on our own, but we must get surrounded by a skilled team that master some necessary aspects of a musician's career to compensate for our weaknesses. For him, the DIY approach can harm musicians rather than help them.

Considering the findings of this thesis, the best way to create this project team is to identify other entrepreneurial and skilful profiles around us. For that reason, networking is also critical. We all had (or have) secondary projects aside from *How To Six*. These multiple experiences give us insights into how it works elsewhere to get inspired or learn from others' mistakes. Integrating know-how and knowledge directly "on the ground" is a non-negligible extra.

Our guitarist stated that it is necessary to master the community around it to carry out a musical project. By that, he meant the audience, the social media and the team surrounding a musician or a band. So, **community managing** is integrated into the project, it is necessary, and it can make the difference between the amateur and professional musicians. He explained that musicians must succeed in including the public and consumers in the project and creating a sense of belonging.

8. The creative process, my personal experience as the primary songwriter

Indeed, I do not care about the demand in my creative process. The reality behind that is multiple. First, I play and create music for myself. Above all, I compose music by passion and

because I like it. Then, I want my music to be quite innovative, it is a personal drive shared by many musicians, and I do not pretend to be able to. I want to 'sound' different; bring something new with my pianistic techniques, lyrics, and musical structures. The audience, I think I can speak for the whole group here, comes in a second time by wondering, "How to seduce an audience with our music?". The question is not if we will find an audience but rather who and where this audience is. So, it is partially right that supply, in our case, does not care about the demand. In the end, we intend to succeed in transmitting emotion to our audience; profitability does not really matter but we care about our audience, the demand.

So far, we do not have a specific strategy to build a fan base and will have to consider it before releasing anything. Nevertheless, we have developed unconsciously a **portfolio strategy** through our composition process. In fact, coming from different musical backgrounds, we like to explore all of them when composing. It results in very different types of music. In economic terms, we diversify our offer; a good thing according to the portfolio theory (Krueger, 2019).

According to Van Zuilenburg (2013), independent musicians should network and promote themselves to build a strong network while, as consequence, being opportunity-seeking (what *How To Six* strive to be). They must be persistent, not taking 'no' as a final answer. He also recommends self-discipline and endurance⁴². Last but not least, they should firmly believe in themselves and their creative venture. If we are all confident about the band, we overcome some self-confidence issues within the group (me included) by communicating about it among ourselves. *How To Six* is also our therapy in a sense. Personally, even if it was not a big one, the Maun project helped me achieve self-confidence with my stature as a musician. These are recommendations, and there is always a gap between theory and practice⁴³.

In the end, being a musician and being an entrepreneur, a business-aware person are two very different things, and one should conclude that being an independent musician requires those two aspects to co-exist in one's personality. However, I think it should be nuanced by the notions of the **team** (band) and **network**. Suppose a musician or band's musicians lack personality traits for being promising music entrepreneurs, but they want to develop an independent career. In that case, they should get surrounded by a skilled business team. To ensure a good choice for creating their project team, musicians should look for entrepreneurial people who love their music. The fan base, in that case, can be a fertile ground to find such profiles, and it can even arise naturally from social media.

⁴² Musicians are quite naturally self-disciplined as they had to persevere when learning their instrument.

⁴³ It recalls the introductory sentence used to illustrate our 'Innovation management' course that said "In theory, there is no difference between theory and practice. In practice, there is". (Gailly, 2019)

A practical guide for young musicians

This part is inspired by my band's learning, thanks to the research background I cultivated. In this part, I try to summarise all the knowledge acquired about the current music industry to help young musicians better understand all the current industry stakeholders and where to begin when starting a musical career. First, it may be interesting to take a random Internet article proposing a guide of streaming music for artists. Then, I present my version of a practical guide for indie musicians comprising the three main aspects studied in this thesis: streaming platforms, social media and live performance.

So, I found an online guide about Spotify advising taking the following steps. First, musicians must get their music on platforms through labels or aggregators. Then, they should put music everywhere else (even on free services and more traditional ones) and get spotted by critics and music bloggers to reinforce promotion through their voice (Pitchfork, Hype Machine are mentioned). Artists should try to get their music on playlists as their influential power can engender positive feedback loops. Finally, they must use data about listeners to know more about the audience features (age ranger, gender, music genre, Etc.) (Titlow, 2017). For favouring playlist selection, Krueger gives some tips. The first thirty seconds are crucial to perceive royalties, and more generally, the beginning of a song is essential, particularly in pop music. According to that point of view, if a piece features another artist, it should appear during those first thirty seconds (Krueger, 2019).

I developed a 10-steps guide for indie musicians and the commented version is to be found in Appendix H.



Figure 6: Practical guide for indie musicians

Trends go very quickly, so musicians should reap the success from their ephemeral popularity to try to secure and sustain it. The first steps (before first releases) take time. It is not bad because this period is critical to creating solid foundations for the musical project and should be meticulous and thorough. Once the first releases reach the audience, there is no more "thinking" time as everything follows quickly. If the release is not well-prepared ahead,

musicians risk missing essential opportunities at the critical moments of the launch: first concerts and streaming platforms. Social media are pervasive, they are represented as intermediate stages, but artists must keep an eye on their social media and staying active by posting regularly. To conclude about that practical guide, **communication** as a band or a team (solo musicians and their environment) is central.

Managerial and economic contribution

The first tool developed here before is intended for musicians. Nonetheless, it is easily adaptable for entrepreneurs in the creative industries and influences marketing, in particular. If the notion of music streaming platforms and live performance are no more relevant, they can be modified by other essential steps in an entrepreneurial endeavour like professional or influence platforms, meeting the audience through job fairs and networking events. I have designed a framework for young independent musicians applicable to young startups/entrepreneurs to be more precise and concise.

1. The indie music triangle (Appendix I)

This triangle summarises the three dimensions developed by Hugh Brown (2012) about the independent music scene and the value of esteem. Here, the triangle helps to understand which dimensions a musician should consider before pursuing an independent career. All axes are a continuum spectrum between two approaches. We are interested in the approach considered a "requirement" for a successful indie endeavour:

- 1) Musicians who want to retain **creative freedom** and reject any external control systematically or comprising their artistic integrity are more likely to follow the indie way.
- 2) A musician who cannot create a supportive and diverse **network** would prioritise a smaller network composed of more significant actors like labels and are less independent.
- 3) Musicians who do not have any talent for business will mainly have contract relationships with little or no control over the business and creativity. In contrast, independent musicians have a business sense.

Independent musicians, controversy, will have few specialised relationships but rely on trustworthy, often close, relationships with great creative freedom (Brown, 2012).

For the first dimension, it is good to leverage fans providing social media labour which relieves musicians (**engaged fans**), but the main drawback is the growing bargaining power of fans. Musicians must manage their expectations without compromising their creative freedom.

For the second, the central negative aspect is the "selling out" issue already discussed. The third dimension can be critical as it takes much time to manage all aspects of an independent career. In general, administrative and business tasks are seen as a necessary evil, but it is generally due to their lack of knowledge and practice for those tasks. However, in *How To Six*, it is a good point as I am interested in this specific aspect of our project development. The different background of each member, in terms of studies and specific interests, is really a strength.

2. The BAND framework

The BAND framework is an acronym for Business, Audience, Network, DIO (i.e., Do It Ourselves). The last is an augmented understanding of the concept of DIY inspired by John Kellogg's 'Introduction to music business' MOOC classes (2020)⁴⁴. It seems more appropriate here as a band or the team surrounding an artist is mainly composed of family and friends at the beginning. Speaking in "us" rather than "you" puts all team in action and helps understand the collective and individual roles underlying this approach.

1. Know your **Business**, i.e. define a business model and have a business plan.

Independent artists need to position themselves on many different topics as they have no all-inclusive service package as labels. For example, they should decide if they go for free streaming as an expanding strategy or revenue-securing streaming platforms. The *indie music triangle* inspires this first point. The questions underlying the three dimensions of the triangle are starting point questions that indie musicians should ask themselves before going for an independent career.

2. Know your (target) **audience** at the start

Suppose it cannot be stated that social media offer equal opportunities to all musicians across the power-law distribution. In that case, musicians should leverage some promotional benefits to initiate a strategic launching through their different social media accounts. As segments are crucial in marketing, the audience is vital for musicians. The significant difference between the two notions resides in the emotional relationships between artists and their fans. It is not only a question of targeting the right people to maximise one's profit. It is a question of getting your message heard, your music loved and esteemed. It is about sharing a unique experience. Seeing your customers as emotional individuals rather than segment units might be a key for small entrepreneurs too. Once again, the ubiquitous nature of social media must be underlined (Hypothesis 2). In the case of musicians, knowing their audience and getting their

feedback involves using analysis tools provided by streaming platforms. Streaming services are a significant diffusion channel in the music industry (Hypothesis 1).

3. Build a reliable **Network**, online as well as in real life.

The close team around a musical project is the starting point of the future broader network. It should be composed of the different complementary profiles, and more importantly for independent musicians, it should comprise entrepreneurial profiles. In the case of music bands, they already represent the nuclear ecosystem of their musical project and should leverage the benefit of their intrinsic diversity. Brown (2012) underlines the 'family and friends' aspects of the starting network. Social media is a helpful tool for building a network, confirming its importance as a promotion and diffusion channel for independent musicians (Hypothesis 2).

4. **Do it ourselves**⁴⁵

If you cannot do everything by yourself, ask your network. It considers the third hypotheses assuming musicians should be entrepreneurs. Even if the team surrounding an indie musician should be composed of entrepreneurial profiles, it seems that this necessity does not apply directly to the musician. Although they can lack managerial skills, indie musicians must be aware of the importance of entrepreneurial skills when developing their independent careers. Do it ourselves is inherent to independent approaches and so applied to entrepreneurs as well.

To make a general conclusion for entrepreneurs, having a solid core team with diversified profiles is a robust starting ecosystem. Creating trustworthy relationships is a simple step on the path to creating your own business. In the end, the best conclusion is the following: passion should prevail. Investing and creating in a project we believe in do not ensure success, but without a strong belief in our project, it is nearly a guarantee of failure.

Section 6.2. Conclusion

To give a general conclusion about the **music industry dynamics**, it seems that it perfectly responds to the life cycle definition. At the industry macro-level, the phenomenon of successive intermediation, disintermediation and reintermediation has been extensively described above. The same observation about music as a commodity (commodification, decommodification and recommodification) (Fleischer, 2017), it is cyclical, and the bundling of music (bundled in albums, unbundled with singles, bundled with playlists). The same kind of cyclical patterns is to find in the emergence of new musical genres. As underlined by our singer (studies

⁴⁵ MOOC

musicology at UCLouvain) during our discussion with *How To Six*, ideological breaks have always been brought or followed by significant musical changes.

The music industry is ever-changing, and musicians, the most valuable suppliers, must accommodate. Independent music, which was the main focus of this research, inherits its ethos from previous independent movements but translates into different forms. Suppose some musicians continue to develop entirely independent careers through DIY strategies and home studio facilities. In that case, others struggle to master every aspect of the new music value chain and choose to get surrounded by a close skilled team. Independency now means more than ever keeping as much control as possible on the entire process.

Social media has reshaped the marketing around music, and independent musicians, as a band or individual, must use their features to reach an online audience. It cannot be more accurate than at this unsettling time of sanitary crisis. The same applies to **streaming services** that condensate the music in a simple application. For independent musicians, who get rid of as many intermediaries as possible, it is the place to be anyway. The other generally favoured channel is **live performance**. It is essential to see music as an experience to share with an audience. If being a pro studio musician is rewarding on platforms such as Tik Tok, live musicians still have a bright future ahead of them.

Finally, independent musicians should think strategically when developing a musical project and expecting to make a living from it. It is not new; those musicians do not benefit from the network and skills of big players and decision-makers in the industry. The key is finding your audience and building up a solid and faithful fan base through engaged fans on social media and concert fans in live performances. After, the natural fan labour will make its way to casual listeners. It suggests that indie musicians should develop **entrepreneurial skills** or, at least, surround themselves strategically through networking. The **BAND framework** is a great tool to help them take away the most important critical points of a launching strategy.

This thesis began with a personal methodology, and it should finish with a personal conclusion. It does not feel like music is data like music is a digital or physical good. It does not even feel like music is a secondary activity. Because music is about passion, a passion that prevails above everything and once we are convinced about that, our creative epiphany - to use the term of (Brown, 2012) - has come. At that moment, we believe enough in the project to kickstart it, and it does not mean that we will succeed in it, but we will try to and hope that the practical guide provided here will help us break through. In the end, growing as a band, learning from our experience and living our dream together is maybe the best to know way *How To Six*.

Section 6.3. Limitations

Limitations

The approach to streaming platforms and social media was quite general. The aim was not to analyse them but to understand their role in the current music industry to extract necessary observations and study their impact on musicians. This vast subject has already been dealt with in many papers (partly used in this thesis), but they continuously evolve and adapt their business models. The next revolution might be the innovative fan-empowered revenue system of SoundCloud and should be carefully studied. During this research, the focus was on musicians and their creative process. If the underlying question concerns the ability to make a living as a musician, the financial possibilities have, at best, been mentioned and would require some further questioning. Alternative financial means such as tipeg, crowdsourcing and crowdfunding are all potential subjects for further analyses. The other crucial aspect of the music industry is copyright. I decided not to go deeper into that specific subject when addressing the income issue related to the streaming because it is dense, and the entire system should be rethought, in a sense.

The main limitation of this work has been my methodology. I would have liked to interview other bands, similar but also from a different musical background, and compare the attitudes and feedbacks about their experience towards social media and streaming services. Covid-19 made me change my plan at the beginning of my research. However, I find that such research would have gone beyond the scope of a master's thesis and is still to be explored.

To go further

To follow up on the tools developed as part of this research, I would suggest further investigation to complete the BAND framework, which is an example of the parallels that can be made between musicians and entrepreneurs. In my opinion, similar behaviours are expected from independent musicians and entrepreneurs at the launching of a project, whatever it is. More than that, I would suggest that, in the specific case of bands, some group dynamics and patterns may explain or describe the inherent teamwork to launching a project.

Finally, considering the industry's current development, it seems that a new social media now plays a central role in the music industry: Tik Tok. If I mentioned it succinctly, the disruptive nature of its popularity and its impact on the music industry are considerable and would deserve an entire paper.

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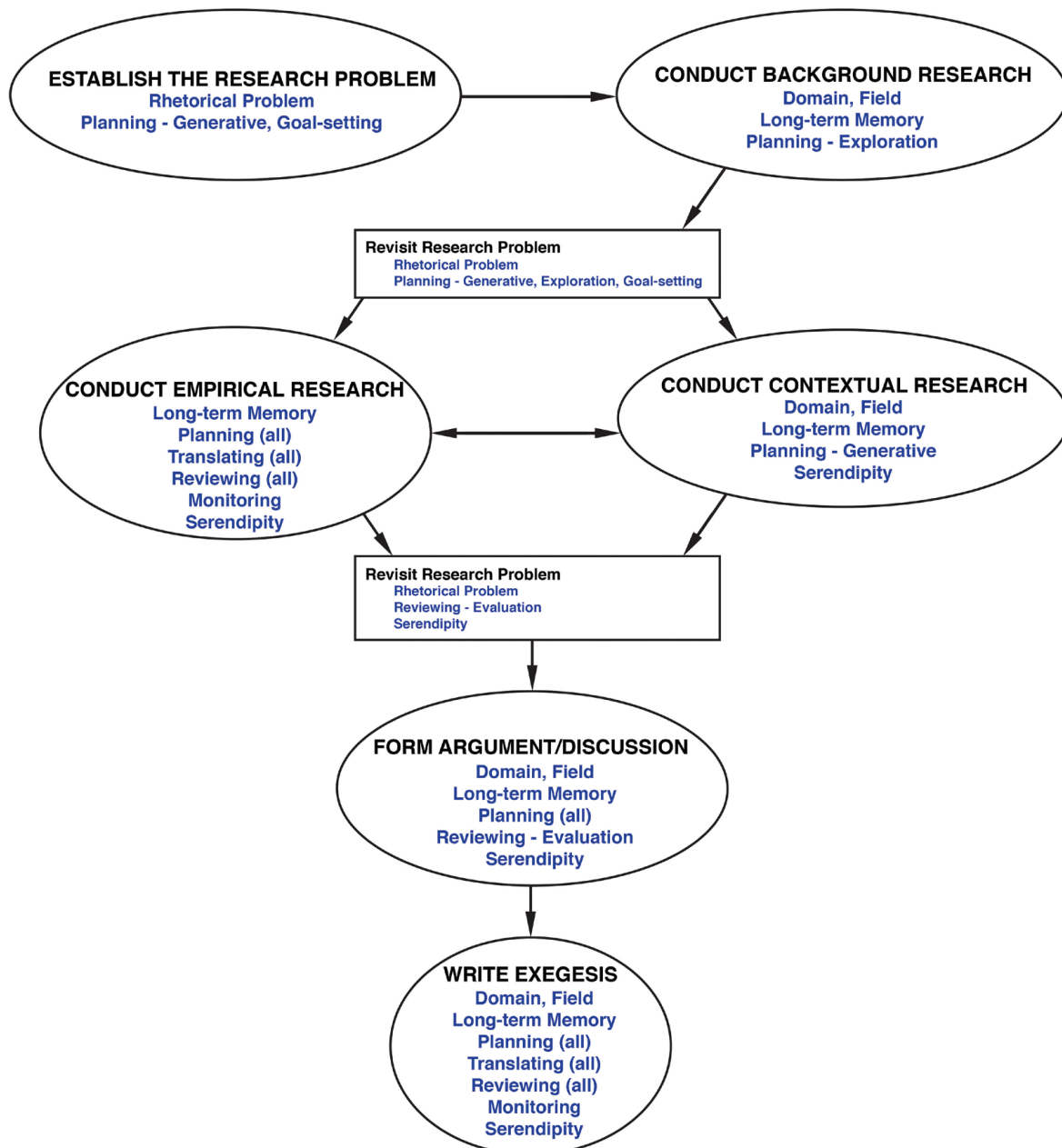
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Appendices

Appendix A. The outline of the Practice-based Research Method

This outline is suggested by Skains (2018).



Appendix B. Historical background of Rock music

Origin of Rock music: an aesthetic more than a musical genre?

To introduce this part, a leap in time is necessary at the time of the advent of rock music. In the mid-50s, the **rock and roll music** exploded scores in the United States. At that time, rock music is the most popular music genre and like any young movement, it evolves quickly and mutates. The rock music is not only a question of style but of circumstances. The 50s are a fertile ground for the combination of white and black music, the rock'n'roll music benefits from a young audience and a new segment becomes increasingly significant: the teenagers (« Rock and Roll | History, Songs, Artists, & Facts », 2020). To satisfy them, the less expensive "**45" single**" medium is privileged for music distribution (Bockstedt, Kauffman & Riggins, 2005). While the new musical genre owes its spin to the reunion of white and black music of his time, the rebel figure of the 50s is a white suburban teenager in crisis (Curtin, 2021) leaving little room for black music. This tendency predominates the rock movement with some notable exceptions who are Otis Redding, Marvin Gaye, or Steve Wonder (Regev, 1994).

Technically speaking, the 50s and the advent of rock music initiate a great shift in what is considered as artistry. If popular music before 50s was mainly considered as **entertainment** rather than a real art form which is hierarchically superior to simple cultural form in the ideology of "superior reality" of art (William, Bourdieu cited by Regev, 1994), the second half of the century brought new means of performance that are amplification and electric instruments. Creation of music becomes a process of assemblage, and the studio work becomes a quite independent form of music in parallel to live performance. Before, studio was a necessary passage to crystallize the musical creations produced live. After, it has become a lab to experiment new ways of composing and producing music. With this revolution, new creative roles have been appearing such as sound engineers and music producers who generally bring added value to the music output. Moreover, rather a music executor, musicians take a greater part in the music composition process. If a song was a musical structure with lyrics interpreted by many musicians in with an infinite number of live versions, there is now "originals" that corresponds to the song produced in studio and more than a work of reference, it can become an artistic artifact. The distinction is now made between original works and their covers by other musicians and performers. Through this transition, commentators begin to promote rock music as a real, serious art form. The main issue rock music has been facing until now is the conflict with its core value of authenticity through its subversive nature that contrasts with its

progressive institutionalization becoming a "mainstream" music genre (Regev, 1994). In the thesis, the "selling out" issue that some bands encountered like Green Day in the 2000s is an evidence that Rock music is still closely link to its ethos and general aesthetic.

First denounced by an America of good morals, the rock and roll are spreading with teenagers all over the world and diversifies into a multitude of sub-genres grouped under the name of **rock music** (« Rock and Roll | History, Songs, Artists, & Facts », 2020). Rock'n'roll is a good example of how music can be influential on society and the moral repression that rock has experienced so far is proof of this. Since Elvis Presley's dance moves considered as subversive in the 50s to the trial of the poorly hidden satanism of the hard rock bands in the 80s, parents of America and their conservative society work to censor this music considered impure. From the start, rock music has been the bridge to cross for young generations moving away from the constraining morals of their time and getting closer to their new ideals of fun and freedom (Curtin, 2021).

By the 60s, the Beatles initiate the British invasion⁴⁶ and a new distribution medium emerges: the **LPs**⁴⁷ which is also commonly known as **album** (Bockstedt, Kauffman & Riggins, 2005). To use Regev's expression, the album became "the unit which radiates artistic aura" (Regev, 1994, p.93) as "masterpiece" and the rock group became, in the process, the quintessential self-contained creative unit. It is time for super rock stars and the excessive reactions of fierce fans that is exemplified by the Beatles mania phenomenon.

In the continuous research for legitimacy, rock music has found strong arguments through its main figures in the 60s and then their successors. In fact, rock music could now claim to rise to the state of art with "great artists", innovators of musical codes and lyrics and producers of music, and "masterpieces", specific rock music outputs considered as artworks. Rock has always had a specific status by being counterculture and the music of a new youth voice. The legitimation of the artistic meaning of rock music is encouraged in 1960s by two channels that are radio, broadcasting rock music and special emissions around the musical genre, and specialized press, with the occurrence of "serious" magazines (Regev, 1994)L

In the 70s, the punk rock introduces the notion of do-it-yourself (DIY), initially describing the practice of doing things by oneself. DIY practice takes entire part in the punk culture and this characteristic was strongly asserted by punk musicians. The new musical genres

⁴⁶ The advent of British rock music in United States has been considered as the second British invasion thanks to talented rock musicians such as the Beatles, the Rolling Stones, etc. (« British Invasion | Origins, Groups, & Facts », 2021)

⁴⁷ A long-playing gramophone record: usually one 12 inches (30 cm) or 10 inches (25 cm) in diameter, designed to rotate at 33 1/3 revolutions per minute Compare EP (« LONG PLAY », s. d.)

which emerge from punk, such as anarcho-punk or hardcore, continue to enrol in an independent DIY approach. In fact, this culture has radiated over many musical currents in the decades that have followed so far. This evolution must be replaced in the global context of de-industrialisation of the end of the last century. The cultural globalisation accompanied the paradigm shift from product-based to customer-based culture that perfectly matched DIY ethos (Bennett, 2018). This movement, imbued with a thirst for independence, wants to stand out from the new stardom standard, against rock nature. Indeed, rock is the music of "misfits" and of all times, emerging movements of this broad style have preached for a return to the sources. Rock is, by definition, counterculture.

By that time, two ideologies are opposed. First, the pop rock music enjoys explosive success and maintains the myth of superstars defined previously in opposition to **alternative ideology** which advocates a rock of underground scenes claiming a purism of the genuine definition of rock'n'roll culture (« Rock and Roll | History, Songs, Artists, & Facts », 2020). For the first time, a new generation of rockers claim, not a disruptive novelty, but a return to the roots of rock. In Britain, the themes addressed in the lyrics assert the social problems of their time, the music is rougher and minimalist. Alternative movements also know bursts of rock authenticity through albums like *Dark Side of the Moon* of Pink Floyd or Led Zeppelin and their eponymous album (Regev, 1994).

This rock music historical point is necessary because it is strongly linked to the last notion addressed in this research; **indie rock music** and will be detailed in the last section of this chapter. It is also important to notice here that the terms "underground", "garage rock", "counter-culture", "" are largely used as synonyms because what matters here is the emergence of indie movement in the rock culture. All those terms have a particular definition which does not support the purpose of this paper and would only compound its interpretation.

The rock is profoundly linked to the music industry evolution. In the 80-90s, the Compact Disc (CD) offers a better-quality music and the rock enthusiastic correspond to grown-ups who decide to invest in this new technology. With hindsight, this has been the last major revolution of the physical music industry. The rock addresses to an adult audience who were teenagers when international rock bands were spreading their music globally. In parallel, rock music continues to develop with their movements of this eclectic genre. One has a particularly good name: **alternative rock**, notably with the grunge rock represented by Nirvana. The 80s knows the climax of the video clip with MTV and the famous Thriller clip video of Michael Jackson but have been popularised by **rock** songs (« Rock and Roll | History, Songs, Artists, & Facts » , 2020). The invasion of rock on TV screens has also created an ever-growing distrust

of older generations. The 80s have known their lot of trials against rock bands and have seen the birth of the famous "Parental Advisory Explicit Content" sticker to be affixed to the contents recognized as dangerous for the youth. This regulation has had great implications for rock music with the downward trend in the number of albums sold and a greater distrust on the part of mainstream media. Nowadays, this "explicit content" label makes no more sense with the easy accessibility of those contents through streaming platforms (Curtin, 2021).

As explained in the "Rock music" article of Britannica, the rock music has become broader and broader with a lot of independent sub-genres that cannot be unified. The author says, "In Britain the rave scene [...] converged with “**indie**” guitar rock in a nostalgic pursuit of the rock community past that ultimately was a fantasy".

With this brief introduction, it is easy to understand how rock music shaped the music industry throughout the late 20th century until now.

Rock aesthetic

As rock music is the voice of the new generation in the throes of anger, rage and sometimes violence, it is expected to provide a strong emotion. The work of **sound** is therefore, more than ever, central in the construction of this musical landscape. As we have seen, with rock'n'roll, the music industry saw the emergence of electrified music instruments making the electric guitar the monument of rock. To accompany this evolution, new skills have become central in the music value chain creating new roles like sound engineers and DJs. As sound was prevalent in that new music culture, the **studio** became the place to be for suppliers (musicians) to experiment new sounds, textures, and effects. Studio releases were per se nearly impossible to reproduce in live and an artwork. The **lyrics** and the **voice** of the singers became key features for a music to soak up the rock music aesthetic. As emotion is the central message of the artwork, the voices are charismatic and far from the classical ideals. The audience must perceive the singer live the emotion his or her song conveys. The grain of the voice became serious matter and the lyrics sung too. A great example of that is Bob Dylan who has been awarded the 2016 Nobel Prize for Literature for his poetry (Le Monde, 2016). Finally, **eclecticism** is a good thing in rock music with the example of King Crimson who reconcile jazz and contemporary classical music with rock sounds and who are often quoted, despite them, as fathers of progressive rock. In fact, musicians who manage to mix genres while keeping the authenticity of rock are well perceived in the rock culture (Regev, 1994).

With these four aesthetic features, it is easy to understand why rock music is regarded apart from pop movements although it finds its roots there. The specific voices and lyrics in rock music have always contrasted from the mainstream music through the decades. Eventually, the profound nature of rock is its ability to transcend previous frontiers by always innovating and appropriating new styles from other genres. The vastness of its ramifications, from metal to alternative rock through hard rock and folk, is doubtless explained by the enhancement of eclecticism that is characteristic of it. That's what makes me say that contrary to what has been written sometimes, rock is far from dead.

In this piece of work, we concentrate on the indie movement born during the punk wave of the seventies and who is still embodied in the current rock scene. However, understanding the rock music regarding its history and inner values seems integral to understanding the independent ideology discussed below.

In the digital economy, it seems that the new "underground" scene is made of alternative music and entrepreneur profile (Rosenberg, 2018). Those artists value more the authenticity of their art than the commonly accepted path to success in the digital world. Those artists are more incline to pursue an independent career with a Do-It-Yourself approach. By that, the author means that those musicians appropriate current technologies to largely master the value chain from their music production to the promotion of their art. In the introduction of her article, Linnea Rosenberg points out three main aspects of the indie lifestyle nowadays that are the DIY approach, the self-promotion, and the fan engagement. She takes the example of subcultural icons of Los Angeles that emerged during the *riot grrrl* movement in the nineties and gave birth to the now mainstream "Dark matter" zine. If this example seems quite far from the purpose of this paper, it brings relevant insights of the use of social media to self-promote in a counterculture environment and how the DIY has become a new alternative mode of the music business at the digital era.

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Appendix C. The Business model canvas for collective, cooperation and collaboration models (O'Dair, 2015)

Collective BM, Co-operative BM, Collaborative BM

Key partners Collaborative BM (ex. Crowdfunding) affects the <i>key partners</i> becoming crowdfunding platforms, for example.	Key activities Collective enlarge the range of expected <i>activities (DIY path)</i> <i>Activities</i> are not modified by collaborative BM but musicians has a new duty to inform the crowd (i.e., their investors).	Value propositions A musician collective can complement <i>value proposition</i> (central role of the collective ethos). A co-operation can complement <i>value proposition</i> (publicly self-identity). Collaborative BM is perceived as more authentic by fans who are investors, it adds a certain <i>value</i> .	Customer relationships	Customer segments A collective can give bands a “brand” to reach new <i>customer segments</i> . A co-operation give access to more <i>customer segments</i> .
	Key resources Collective can provide musicians with a larger scope of <i>resources</i> . A co-operation allows to put <i>resources</i> in common across members.		Channels Collaborative BM (ex. Crowdfunding) affects the <i>main channel</i> becoming crowdfunding platforms, for example.	
Cost structure Co-operatives share <i>costs</i> that remain high.			Revenue stream By distributiong profits, co-operatives mitigate risks of unclear <i>revenue</i> from the new music industry. Collaborative BM make the crowd being the main <i>revenue stream</i> .	

Appendix D. Historical background of independent music movements

A brief history of independent music movement

Before talking about independent musicians/ artists, we talked about **independent labels** as it required specific means of production and dissemination that are now accessible from home. Those premisses structures emerging from the underground and punk movements seems to have professionalised comparing to their expected ideals. It is certainly due to the poor conditions reserved to small actors in the music industry, notably high pressure from market, higher risk of failure than major with large margins, blurred lines between professional careers and personal life as well as huge workload resulting from lack of means. There has been a clear gap between the idealism and purism of early and the necessity of financial stability and success to reach a sustainable position in this ever-changing market (Hesmondhalgh cited by Bernardo & Martins, 2014). According to Hracs (2012), it seems that the past niche market position of independent music has become a mainstream production model (Bernardo & Martins, 2014). However, this point of view must be nuanced because the general music industry has grown in term of size and considering independent musicians, and more specifically indie rock musicians, it is difficult to agree that it has become a mainstream trend but it has certainly gain in visibility, those two notions should not be confounded.

To understand the importance of the paradigm shift from major leading industry to more fragmented power structure, it is important to remember the past position of independent labels. They have nearly no power comparing to major and distribute music through distribution networks of majors. Major owned almost all functions and mix them to be the most profitable while continuing take risks to offer the largest choice to consumers. With MP3 technologies, major lost their privileged position and found the legal aspect as the only weapon to fight against new coming file sharing networks such as Napster. Although Napster lost, it didn't stop the worldwide distribution of pirated music through other networks around the world. Then, realising that the majority of Napster's users should be willing to pay a monthly fee, BMG developed a legal version of Napster with the parallel development of new business models like the "pay-per-track" model of Apple's iTunes. Although some contemporary commentators predicted the end of "bricks and mortar" shops, the opposite happened reinforcing the retailing power of the great chains who becomes trend indicators for majors. As a result, the prices fall down and the music offer shrank to limit to top hit singles. Also, retailers use music and DVDs appealing products by pricing them below cost. It is also true for Apple whose final objective

is iPod sales. A final consequence of the distribution power shift to e-tailers is the new dominant trend of singles instead of albums encouraged by business models as iTunes' pay-per-track (Hracs, 2012).

Although DIY approach seems a more and more affordable alternative path for artists thanks to practice such as home studio and self-promotion on social media, there is a few non-negligible brakes at the start of a completely independent career. The musician needs to master a lot of diversified skills from home production to live performance booking without forgetting the time dedicated to composition and thus to the musical creativity so claimed by these artists. Even if they benefit from a total creative control, the workload induced by such musical careers is so intense that it may compromise the quality of the musical work delivered. A balance must be found to ensure the release of a good quality creative work without swallowed up by an omnipotent actor as the major are sometimes described (Bernardo & Martins, 2014). Once again, the DIY approach should not be removed from the social and economic context in which it was born. The new generation of the 70s, unlike the previous generation, was the first to face precariousness and instability of employment. As opposed to the lifetime single career path, labour became a short-term perspective. In the construction of those DIY careers resides the strong appeal for alternative paths to the economy-centered society. DIY and independence in music, in general, were a means to avoid pop music capitalization and so, criticize the system. It resonated with the "palpable 'underground' resistance" (Bennett, 2018, p. 134). However, by taking successively the examples of Portuguese punks and the hip hop Iran scene, independent and DIY musical development can be either due to the necessity or to rebel against a certain establishment, even oppressive authority (Bennett, 2018). So, there are two main drivers for musicians to follow an independent path: the necessity of the situation, meaning that it is to difficult to reach the music industry otherwise, or by conviction.

It seems that DIY approach emergence in the music industry is linked to a simplification of music that made genres like Rock'n'roll more accessible for the young generations (Bennett, 2018). It recalls the question of lyrics becoming simpler studied in the last chapter. In fact, the observation made concerning the compressibility of lyrics can be translated here as accessibility being unlocked by easier musical structures like "chorus-verse" imposed by rock and its ensuing genres in comparison to other popular genres at that time like jazz. However, jazz, at the beginning having been criticized at its emergence demonstrates one thing: music history is always repeating itself. Today's independent musicians surely inherit some previous DIY and indie features but it continues to evolve in parallel with the society evolutions.

Making independent music in the digital age

In 2004, Mark Fox explained the benefits independent labels can obtain from digitalization. First, new distribution modes had allowed those labels to get rid of majors' supremacy. It becomes easier than before to find talents and recruit them thanks to the cost reduction. However, they still struggle to reach a larger audience. Digitalization also made the whole process easier from the production to the marketing of music. In fact, computer technologies made music production possible for everybody. With digital offer, the record companies do not commercialise product anymore but rather data. For this reason, there is no more risk of over- or underproduction of physical goods. Finding artists to promote is facilitated by insights from consumers, i.e. listening preferences, music trends, etc.

Before, independent production was an alternative to major labels and artists must delegate functions like recording, marketing and distribution of their songs to actors with the required skilled professionals and enough money. The only power left to independent musicians was CD sales on the street and live performance but in general, that independent development was the path found by artists to make a name for themselves in the music world and eventually get signed by major labels. New technologies finally enable musicians to become fully independent including the development of home studio that make the recording function fully accessible for musicians. Traditional barriers of entry that were costs and skills suddenly collapsed and have also made marketing and distribution of music possible for musicians on their own. We talk about "flattening effect" of the technology because the result is a wider supply side on the market in terms of amount of musicians and of localization as home studio allows musicians to produce music from everywhere (= structural and spatial freedom) (Hracs, 2012).

At the age of millennials, the **definition of indie music is blurred**. If it inherits its name from the independent music movement, the reality is quite different and it refers more to an aesthetic or ideology than to a specific musical sub-genre. As we have seen, music is more and more valued for the experience it provides to consumers, we talk about "experience based products".

We have seen that major labels, losing market share in the new dynamics of the music industry, are more risk averse and prefer to sign artists who have already proven their value. The trend examined in recent indie rock bands is surely a consequence of the emergence of streaming platforms and the new forces regulating the music market. Indeed, if independent music genuinely claimed for integrity and it seems that a growing number of bands take that path to deliberately sell out. However, the profound nature of indie rock music stays vindictive

and anti-system so the designation may have been overused, a distinction can be made between "authentic" and "opportunist" indie artists. This consideration obviously revives the ceaseless debate inherent to rock. That will not make haters quiet, for sure.

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Appendix E. The traditional model for artists with majors

When comparing the two situations, it is easy to notice that most of the roles exercised by other actors in the previous scheme are now supported by the musician on his/her own.

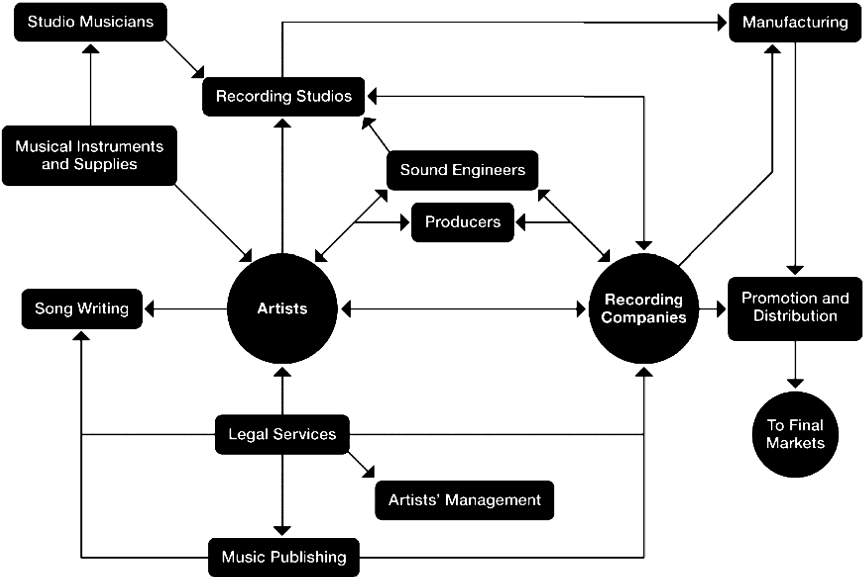
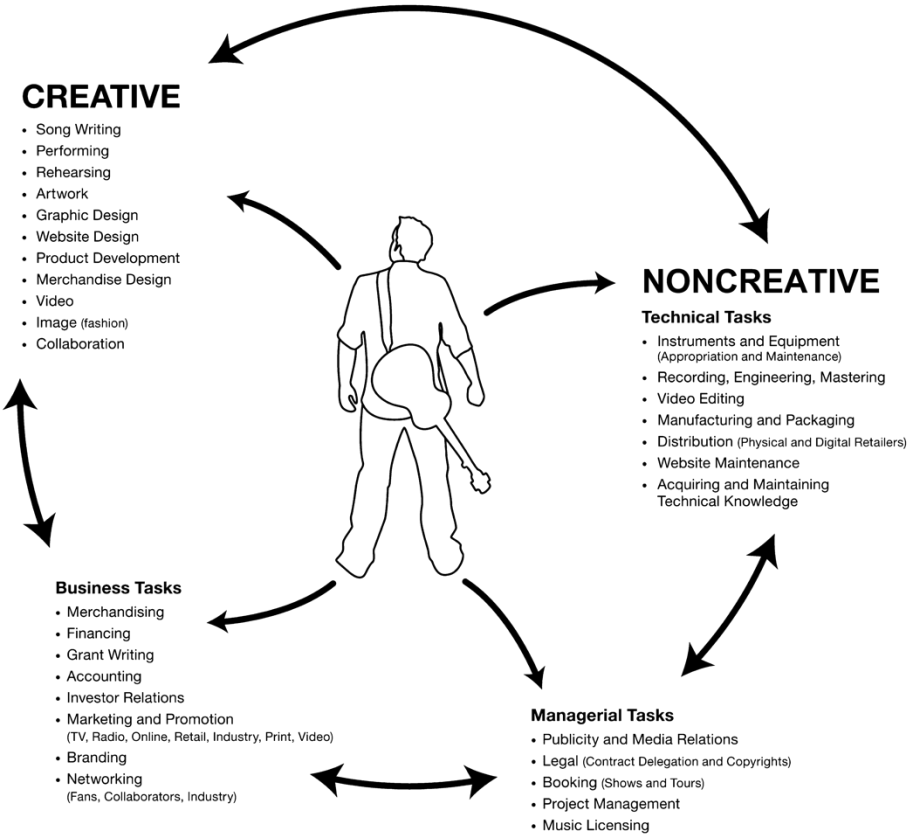


FIGURE 1. THE TRADITIONAL MODEL OF SERVICES CONTROLLED BY THE MAJORS (ADAPTED FROM SCOTT 2000, 117).



Appendix F. The transcript of the discussion between the members of *How To Six*

In the following, the interviewees are referred as 1 for the drummer, 2 for the bassist, 3 for the signer, 4 for the guitarist and M means « Mathilde » as I am the interviewer. The transcript is in French as it was the language spoken during the interview.

M : Une question générale pour commencer, comment pensez-vous que l'industrie musicale a été impactée par l'arrivée des nouvelles technologies (streaming et réseaux sociaux) ? Et en quoi, le fait d'avoir tout sur son téléphone, a changé notre manière de consommer ? Vous pouvez répondre en tant que consommateur et en tant que musicien, voire de manière plus générale à propos de l'industrie.

1 : En prenant le point de vue du consommateur, ça change tout : le fait de ne plus écouter par album mais par playlist ou par morceau. Ça change tout, on écoute différemment. Les playlists et les plateformes de streaming comme Spotify me permettent de découvrir un milliard de chose par jour, on me propose des suggestions qui me correspondent et je peux passer d'une musique à l'autre sans aucun souci ce qui n'est pas possible sur un vinyle. Après, on lui connaît les qualités suivantes : un son plus chaleureux, la découverte d'un album dans son intégralité, l'écoute de la musique POUR la musique sans faire autre chose en même temps comme cuisiner ou lire. Donc, dans la manière de consommer, c'est comme ça que je ressens la différence.

3 : Moi globalement j'ai le même avis que 1 qui est vraiment avec aussi cette notion d'accessibilité, le fait qu'on y ait accès aussi facilement, aussi rapidement sans « aucun effort », dans le sens qu'il ne faut pas acheter un disque ou qu'on ne doit pas attendre que le morceau passe à la radio. Cependant, peut-être que ça banalise ou « randomise », je ne sais pas si on peut dire ça comme ça, le fait d'écouter de la musique mais aussi le travail que demande une musique. Surtout que, si maintenant je te parlais plus en musicienne, je ne l'ai jamais fait pour ma part mais je sais que maintenant c'est aussi extrêmement facile de juste faire une musique dans sa chambre et de la poster sur une plateforme alors qu'avant, pour qu'on entende ta musique il fallait déjà aller beaucoup plus loin. Je pense que vraiment c'est la notion d'accessibilité, que ça change tout. Du coup, ça change aussi la manière d'envisager la musique comme quelque chose de vraiment courant, tout le temps en fond dans nos vies et comme disait 1, on ne va plus forcément prendre un moment particulier pour écouter un album mais on va assimiler ça au background.

1 : Mais cette accessibilité, pour moi, est vraiment à double tranchant : à la fois, c'est génial, aussi bien pour les artistes que pour le consommateur (par exemple, des plateformes comme

DistroKid qui nous permettent de mettre facilement des morceaux sur les plateformes) mais à l'inverse, bien que ça donne une chance égale à tout le monde, ça multiplie le nombre de personnes qui publient. A la fin, ce nombre ne veut plus rien dire tellement il est énorme, tu vois.

3 : C'est ce que je voulais dire aussi.

2 : Vu qu'il y a moins d'écoute par album et aussi moins d'écoute par par artiste, je trouve que c'est une manière de consommer qui fonctionne par tubes. Tu te retrouves avec un morceau d'un artiste qui t'est proposé et puis tu passes direct sur un autre artiste, et ainsi de suite. Ça pourrait aussi un peu expliquer l'avènement de toute la musique pop aussi qu'il y a eu ces dernières années.

4 : A propos du fait qu'on peut très facilement avoir accès à la musique. En fait, j'utilise Deezer, et je ne sais pas pour Spotify, mais ça propose des artistes aléatoirement. Tu écoutes une chanson et il te sort tout plein de morceaux associés. J'ai l'impression que cette potentialité de découverte peut vraiment avoir un impact très profond au niveau de la consommation (parce que tu vas te mettre à écouter des choses sur lesquelles tu ne serais jamais tombé autrement). Tu vois un album, un groupe que tu apprécies a parlé d'un autre groupe ou alors tu vois une pochette d'album qui t'intéresse, Etc. J'ai l'impression que ça peut vraiment avoir un impact assez profond en fait, ce genre de conditionnement-là, parce que ça crée une sorte de facilité de connecter avec plein d'autres types de genres différents. Tu finis par écouter des styles de musique que tu n'aurais peut-être jamais écouté, peut-être aller à leurs concerts et être inspiré par d'autres communautés que tu n'aurais peut-être jamais connu autrement.

1 : Alors je ne l'ai pas expérimenté personnellement parce que j'ai jamais vendu d'album mais je sais que les la manière d'être rémunéré sur les plateformes de streaming et la manière d'être rémunéré par des performances musicales ou le fait de vendre sa musique de manière concrète sur CD changent complètement. En fait, à moins de faire un gros buzz, c'est finalement très peu avantageux pour un musicien de de vendre sa musique sur Spotify parce qu'il faut un nombre de de streaming astronomique avant de pouvoir gagner sa vie. Maintenant, je n'ai pas une connaissance du marché incroyable ...

M : [Parenthèse explicative à propos du système de rémunération introduit par SoundCloud, le « fan-empowered » business model que j'évoque dans mon mémoire.]

3 : J'ai un peu réfléchi et j'ai réussi à structurer l'idée de ce qu'on voulait exprimer tantôt par rapport) l'accessibilité et au fait que tout le monde puisse poster une musique. Je trouve que ça retire un peu de crédit au métier de musicien et à tous les métiers de production et de réalisation qui vont autour d'un album ou d'une chanson parce que du coup « tout le monde peut le faire ».

Ça devient même facile d'avoir des logiciels gratuits en ligne. Du coup, au-delà de comment le musicien doit vendre sa musique, ça questionne carrément la définition du musicien et du métier de musicien. Qu'est-ce que c'est être producteur et tous les métiers autour de la musique ?

1 : Je suis complètement d'accord avec toi. Pour l'instant, on est à l'ère du home studio et du DIY. Le musicien se retrouve à prendre toutes ces casquettes, même celle de réalisateur de clip. Le musicien doit aussi gérer les réseaux sociaux, il devient presque *community manager* et je suis d'accord que ça discrédite le métier de musicien, dans un sens. J'ai rencontré beaucoup de musiciens amateurs qui justement négligeaient toute une partie de ses nombreux métiers et ça les desservait clairement.

3 : Maintenant, c'est aussi la mode sur YouTube des vidéos comme « j'ai écrit un son en 20 min », « j'écris un son en une journée », etc.

1 : Le challenge est intéressant en soit mais ...

3 : Oui c'est sûr mais je veux dire : parfois, ça ne vient de personne qui n'ont même pas une chaîne de musique ou quoi à la base, ça change carrément la dimension des métiers en fait.

M : Pour rebondir sur ce que tu dis, car j'allais poser la question plus tard, est-ce que, justement, cette manière de présenter la musique a un impact sur la valeur de la musique en tant que tel ?

3 : Oui, je pense. De nouveau, ça dérive de cette manière de consommer la musique comme disait 1. C'est parfois juste un moyen combler. On ne considère parfois plus l'écoute de la musique comme une activité en soit la majorité du temps.

2 : Je suis assez d'accord avec mais, pour moi, au même titre pour le sport, la musique peut aussi avoir ce côté amateur et/ou professionnel. Du coup - c'est vrai que ça peut un peu te desservir et la qualité ne sera pas la même mais - tu peux être musicien amateur, en être conscient et donc ne pas avoir recours à toutes ses casquettes parce que tu ne cherches pas à te professionnaliser, par exemple.

4 : Pour prolonger la réflexion sur cette question de redéfinir vraiment ce qu'est un musicien, aujourd'hui, ce n'est justement plus seulement une question de maîtriser l'instrument. Pour quantifier le degré de professionnalisme d'un musicien, on peut compter le nombre de casquettes qu'il est capable d'assumer. C'est une nouvelle façon d'appréhender le métier de musicien et de penser le fait d'être musicien. Par exemple, si tu fais de la bonne musique mais que ne t'es pas capable de bien gérer ton enregistrement ou de bien gérer ton entourage, ça ne va pas être suffisant.

2 : Tu ne dois pas tout faire tout seul non plus. Tu peux faire appel à différents corps de métier et juste penser à tout ça. Tu peux aussi rester professionnel justement en faisant confiance aux

autres corps de métier et je trouve justement que ce truc comme disait 1 d'ouverture c'est le fait tout ça, ça dessert les artistes. Si ce sont des métiers à part entière, ce n'est pas pour rien.

1 : Oui, du coup je disais que pour moi les nouvelles plateformes de streaming permettent aussi de stimuler la créativité d'une autre manière par rapport à ce qui a été fait avant et l'exemple que je reprends souvent c'est Vulfpek qui a sorti un album sans son pour que leurs fans l'écoute en boucle pendant la nuit et ainsi finance leur projet. L'aspect intelligent et créatif est dans la manière d'utiliser la plateforme à bon escient pour mettre après en avant leur musique. Ils ont trouvé, pour moi, le bon combo de cette manière-là. Maintenant, ça date déjà de 2014 je pense du coup est-ce que cette technique-là pourrait encore fonctionner aujourd'hui, je ne sais pas.

M : C'est peut-être aussi la singularité de la démarche à l'époque qui a fait le buzz, tu vois.

1 : Oui, c'est ça de détourner intelligemment

M : Donc là tu parles de créativité non pas musicale mais plutôt entrepreneuriale à ce niveau-là en fait

1 : Oui c'est vrai on a bien vu.

M : Vu qu'on a abordé plusieurs aspects de la manière dont le musicien en tant que rôle enfin en tant que personne évolue dans l'industrie selon vous, quelles sont les qualités dont un musicien doit s'armer ou alors doit armer son entourage pour s'assurer le bon déroulement d'un projet musical donc que soit la sortie d'un EP ou faire du live, vous en tant que musicien au sens large, quels sont vos idées à vous quoi genre selon vous il faut quoi ?

1 : Du coup, moi je voulais parler du fait que par rapport à ça, là on a beaucoup parlé de la différence entre les albums physiques et Spotify mais je pense que pour répondre à cette question-là, ça peut être pas mal de pointer les similitudes et les constantes qu'il y a eu justement dans l'industrie musicale ces dernières années. Pour moi, les « casquettes », les indispensables n'ont pas changé (de manière assez cliché) depuis les Beatles. Il faut simplement avoir quelque chose à dire, pouvoir être entouré des bonnes personnes, renvoyer une image qui va plaire au public et j'ai l'impression qu'il doit y avoir plein d'autres choses que j'oublie. J'ouvre le débat de cette manière-là mais je veux dire que, par rapport à ça, je n'ai pas l'impression que c'est quelque chose qui va beaucoup changer dans le temps. Les standards de la relation qui va unir un artiste à un public s'adapte mais j'ai l'impression qu'elle a les mêmes fondements depuis toujours. J'ajouterais comme critère : provoquer une rupture avec son temps aussi. On parlait, l'autre jour en répétition avec 2 et 4, de la musique prog et de la musique punk qui ont amené la même rupture avec leur temps mais qui d'un point de vue musical, sont complètement opposés et je pense qu'on pourrait dire pareil avec beaucoup de styles musicaux, les Beatles qui étaient une rupture avec leur temps qui sont devenus un standard et ainsi de suite jusqu'à

aujourd'hui. Pour moi, il doit y avoir une rupture, même si elle est profondément ancrée (Pink Floyd qui a été ancré dans la musique psychédélique des années 60 à Londres, un contexte assez spécifique, a quand même été une rupture par rapport à cette musique psyché des années 60). En résumé, il ne faut pas se contenter de suivre la recette.

3 : Moi, ça je peux même te le confirmer à plus loin de même jusqu'à l'Antiquité. Les grands changements musicaux et les grands compositeurs qu'on étudie (au Moyen Âge, à la renaissance, au baroque, dans le romantisme, dans le classicisme), c'est à chaque fois des concepts et des personnes qui ont fait une rupture avec les conventions de l'époque en accord ou non avec l'idéologie plus générale de l'époque.

M : Et juste petit aparté, selon vous, ça s'est lié à la musique ou c'est lié à l'art de manière générale ?

4 : L'art de manière générale. C'est vraiment cet effet de mettre des nouveaux signifiants. En fait, les choses sur lesquelles les gens peuvent raisonner mais qu'ils n'avaient encore jamais eu de signifiants pour poser leurs émotions et leurs sentiments dessus, j'ai l'impression que c'est là. Je m'avance beaucoup en disant ça, mais j'ai vraiment l'impression que c'est sans doute un truc comme ça qui fait que ça permet que ça prenne tu vois, que c'est quelque chose de tout à fait nouveau qui arrive à trancher dans les codes, on peut vraiment avoir du succès et créer une scission et créer un avant et un après tu vois comme tu disais à l'avant et l'après Beatles.

1 : Pareil pour Picasso, qui a été moqué un peu au moment où il a amené le cubisme. Je ne suis pas un grand connaisseur de l'art pictural, mais je pense pouvoir dire qu'il y a un avant et un après Picasso donc ça serait un peu un raisonnement assez similaire : une rupture qui d'abord est mal perçue et puis petit à petit devient un standard.

3: Elles sont carrément liées. Par exemple, niveau littéraire, ça s'est observé aussi avec les les idées des lumières qui ont aussi influencé la musique.

4 : Dans les situations où l'humain est créatif de manière générale, en fait. Donc, ça peut être les sciences et l'art. Il faut inclure toutes les formes de création humaine la philosophie en faisant partie. À chaque fois que quelqu'un amène une nouvelle vision d'un paradigme dans lequel on était et que ça parle à suffisamment de gens alors on fait face à un changement paradigmatique. Ça s'applique systématiquement sur les choses qui ont été créées avant, c'est toujours dans les codes mais réutilisés différemment. Ça a l'air d'être un processus extrêmement général, c'est justement un truc sur lequel je voulais rebondir mais la question de base si je me souviens bien c'est : « quels sont les types d'outils que sont censés avoir un musicien pour mener au bout un projet musical ? » et là on est quand même focus sur des aspect sociologiques c'est un peu éloigné. Donc pour revenir sur la question de base, j'ai improvisé un peu parce que je n'ai pas

vraiment médité ma réponse mais en tout cas, d'expérience, j'ai vraiment l'impression qu'aujourd'hui, pour mener à bien un projet musical, un des gros points indispensables c'est la maîtrise de la communauté autour du projet artistique. J'ai vraiment l'impression que ça dépend quand même de ce que tu fais, qu'est-ce que tu as envie de faire. Si c'est juste sortir un album, alors à la limite tu t'en fou que tout le monde l'écoute et ta juste envie de faire un album alors il te faut juste un téléphone pour enregistrer. Pas besoin d'une qualité de son extraordinaire, si tu as envie d'avoir quelque chose qui a un minimum de retentissement ou de succès. Au-delà de ça, si t'as envie d'aller à un concert et de ramener des gens, si t'as envie de te faire engager dans un festival, de te faire remarquer par d'autres musiciens, un élément essentiel semble être la gestion de ta communauté. D'après mon expérience avec Insanity, on a joué à la radio grâce à un filon, c'est l'accomplissement d'un projet musical très clairement. Pour le coup, ce n'est pas vraiment une communauté qui nous a aidés sauf si tu considères la communauté au sens large et qu'un ami qui m'a donné une astuce en fait partie, mais j'entends par communauté un ensemble de personnes qui supportent le projet. Dans les grands groupes, tu vois à chaque fois une communauté autour du projet artistique. Je pense notamment à un groupe de métal carolo qui a commencé tout petit dans la région de Charleroi et qui maintenant fait des tournées internationales, ils ont même joué à Tokyo. Un tel accomplissement est certainement dû alors bonne maîtrise de leur communauté, la gestion des contacts, le fait d'être systématiquement là. Finalement, leur point fort a été les réseaux sociaux. C'est à partir du moment où ils ont vraiment développé cet aspect-là de leur carrière qu'ils ont décollé. C'est quelque chose que je remarque dans d'autres médias artistiques comme YouTube. Les youtubeurs font attention à se construire une communauté saine et j'ai vraiment l'impression que si tu veux faire quelque chose de professionnel en musique, aujourd'hui, et de vraiment solide, tu dois passer par là et ça doit être un outil à maîtriser à tout prix.

M : Mais alors là, tu dis que tu dois maîtriser ça personnellement, en tant que musicien, ou que tu t'arranges pour avoir une équipe qui a ses compétences, par exemple une équipe de com ?

4 : Ah oui, le projet doit inclure une forme de maîtrise, qui peut émaner de l'artiste ou de l'équipe qui l'entoure.

M : Du coup, tu l'ajouterais à ce que 1 a dit : avoir un bon entourage, avoir une image qui plait et avoir quelque chose à dire. Si on part de ce que 1 a mis comme guide de base ?

1 : Je vais ajouter : créer une rupture aussi.

M : Ah oui, c'est vrai.

4 : créer une rupture, c'est vrai que j'ai l'impression que cette notion de communauté, d'avoir une image, d'avoir quelque chose à dire, tout ça me semble lié. Après, si tu n'as rien à dire tu

peux toujours créer ce que tu veux dire. Tu peux arriver aujourd'hui et te dire : « okay Ben je ne sais pas trop ce que je vais raconter mais je vais attaquer tel point et je vais commencer à parler de tel point, etc. ». Imaginons, un garçon qui ne sait pas trop ce qu'il veut dire mais qui a envie d'écrire un album. Alors il peut prendre un concept j'imagine la révolution par exemple, et décider d'écrire autour de ça. Il peut créer quelque chose à en dire tu vois, ce n'est pas un sujet qu'il a eu besoin d'expérimenté toute sa vie, c'est un truc qui peut juste décider comme ça. Et ça peut aller plus loin, et que le gars se dise je construis mon image d'artiste autour de ça, je construis un discours autour de ça, et aujourd'hui dans notre contexte actuel, j'ai l'impression que ça va très bien marcher.

1 : je trouve que ça complète bien le point 'avoir quelque chose à dire'. Qui n'a peut-être plus la même signification. Comme tu dis, maintenant ça rejoint aussi ce qu'on disait tout à l'heure avec Chad, quand on disait que tout le monde peut le faire grâce à l'accessibilité des nouvelles technologies. Avant, sortir un album ou faire un passage en radio, c'était exceptionnel, c'était un aboutissement. Donc voilà, je te rejoins sur cette idée qui est toujours central : avoir quelque chose à dire mais qui n'a peut-être plus la même signification qu'à l'époque.

4 : Je réfléchissais à comment bien articuler la notion de gérer sa communauté parce que je sens qu'il y a vraiment rien à faire, il y a quelque chose de l'ordre de réussir à inclure les gens dans la dynamique du groupe, réussir à faire en sorte que le public, que les consommateurs de ton œuvre puissent se raccrocher à un sentiment d'appartenance. Par exemple, tu regardes le monde des youtubeurs vulgarisateurs en France : quand je vais voir un épisode de Nota Bene ou de Dirty Biology, je sais exactement ce que je veux tu vois et ce que je viens consommer. C'est ce que je recherche, c'est ce que j'ai envie d'entendre, c'est l'esthétique que à laquelle j'ai envie d'être confronté, c'est le style auquel j'ai envie de me rapporter à ce moment-là. Et j'y vais et j'ai l'impression que gérer cette communauté ça passe aussi par le fait de réussir à construire tout un personnage autour de tes choix artistiques. Après les gens vont s'y rapporter. Metallica, avec la Metallica Family, incarne bien la gestion de communauté.

1 : J'ai l'impression qu'il y a un truc qu'il faut éclairer dans cette discussion, qu'il faut mettre au clair c'est le fait qu'on parle de la musique en tant qu'œuvre d'art et de la musique en tant que produit, exactement de la même manière ou en tout cas sous le même terme qui est musique comme on pourrait parler par exemple dans du cinéma on pourrait parler d'un blockbuster on pourrait parler d'un dépendant ou quoi et et en parler Oh là ouh là là ouh là enfin voilà j'ai l'impression qu'il faut pouvoir dissocier les 2 et c'est 2 types de musique qui ont un but différent, qui ont des choses à dire qui sont différentes qui ont une manière de communiquer autour qui sont différentes et et j'ai l'impression

4 : Qu'est-ce que tu entendais exactement quand tu parlais de l'aboutissement d'un projet musical ? Est-ce que tu te référais à l'œuvre ou au succès ou à l'objectif très concret de la personne ? L'objectif, c'est une œuvre d'art ou alors l'objectif, c'est un CD. Qu'est-ce que t'entendais exactement par « l'œuvre » ?

M : Je pense pouvoir dire qu'il y a des artistes qui font de la musique pour l'amour de la musique (et je pense qu'on rentre dans cette catégorie-là) ainsi que des musiciens qui font ça parce qu'ils aiment la musique mais aussi parce qu'ils veulent créer le buzz. Maintenant, c'est hyper facile de trouver des vidéos sur YouTube ou des gens qui ne se revendiquaient pas spécialement musiciens se mettent à créer des chansons qui marchent, d'ailleurs. Donc, l'œuvre peut être multiple mais mon mémoire parle du premier cas de figure, il parle des musiciens qui veulent faire de la musique parce qu'ils sont passionnés par la musique et ils veulent réussir à intégrer l'industrie puisque le but enfin le but euh j'ai étudié les musiciens qui veulent que leur musique soit connue. Est-ce que c'est plus clair quand j'explique ça ?

1 : Dans l'explication que tu viens de faire, tu fais la distinction entre les deux par l'intention du musicien : ceux qui veulent faire de la musique par passion ou ceux qui veulent faire de la musique pour le buzz. Au-delà de ça, je pense qu'il y a une autre composante que j'aimerais rajouter parce que je pense que l'intention de l'artiste ne fait pas tout. Je pense, par exemple, à Van Gogh. On ne sait même pas s'il était en état de faire la distinction s'il peignait par passion ou parce qu'il avait envie de vendre. Toujours est-il qu'il n'a jamais vendu la moindre toile de son vivant. Il y a cette notion que j'ai pu aborder à travers mes études qui est là : la sublimation, une notion psychanalytique en psychologie qui, pour moi, est aussi une composante essentielle pour faire la distinction entre un produit et une œuvre d'art entre la création et la créativité qui va être la capacité d'un artiste à transmettre une pulsion à travers son œuvre. La notion de sublimation en psychanalyse est utile pour faire la distinction, au-delà de l'intention, de ce qui va faire ou non une œuvre d'art et de ce qu'il avait la distinguer d'un produit, ce qui va distinguer la créativité à la création. Le pouvoir d'un artiste de transmettre une pulsion par son œuvre, la détourner de son but initial pour l'injecter dans une œuvre d'art et qui va pouvoir créer un espace entre lui et le public auquel les 2 vont pouvoir s'identifier et qui est cette zone où l'émotion artistique. Au final, c'est ce que cherche un public en écoutant artiste et c'est ce que cherche un artiste en transmettant quelque chose à son public et pour moi, c'est là que la différence se joue plutôt que faire de la musique par passion ou faire de la musique commerciale parce qu'au final il y a peut-être de la musique des musiciens qui arrivent très bien à sublimer ça, à sublimer ce qu'ils ont au fond d'eux et des artistes qui font ça par passion et qui ne transmettent rien du tout pour autant.

4 : Juste une petite question par rapport à au rapport à la notion de sublimation mais c'est vraiment une question limite un peu personnel, je me demande est-ce que pour toi, le sentiment d'authenticité face à une œuvre serait relié d'une façon ou d'une autre à la capacité qu'artiste a de réaliser sa sublimation.

1 : C'est tout à fait mon point de vue en tout cas mais ce sont des sujets qui sont assez connotés du coup, peut être que d'autres personnes te diront l'inverse. Moi, j'en suis convaincu et tu as le bon terme quand tu dis : « réussir à sublimer » parce que c'est quelque chose qui peut être qui peut être échoué.

M : J'aime beaucoup les notions abordées ici mais, même sans faire la distinction, on revient quand même à la même question de : comment, en tant que jeune artiste indépendant, on fait connaître sa musique ? Au final, avant même que la musique touche le public, il faut qu'elle y arrive. Il faut qu'elle trouve un chemin jusqu'au public et ce chemin évolue et ça, peu importe quel musicien crée derrière ça. Ce que j'étudie c'est vraiment le début du processus. En fait, c'est le lancement et du coup, ma question c'est : est-ce que cette sublimation elle n'émane pas du rapport de du public à l'œuvre ?

1 : Alors ta question Math c'était en tant que manager, comment vendre comment vendre un produit de manière efficace à l'heure actuelle ? Parce que vendre sa musique, c'est une question qui n'est pas actuelle, c'est un truc qui a traversé les artistes depuis toujours donc la question qui se pose c'est : maintenant, à l'heure actuelle, comment lance-t-on un album, un EP, etc. ?

M : Je ne vous demande pas, selon vous, quelles sont les meilleures stratégies à adopter avec un point de vue managérial justement. Je vous le demande en tant que musicien, qu'est ce qui fait sens, pour vous, en fait. J'ai oublié de spécifier qu'à un moment donné, au fur et à mesure de la question je me suis adressée à vous ; non plus en tant que consommateur et musicien mais juste en tant que musicien. Donc, à partir de maintenant quand vous pose une question, c'est selon vous en tant que musicien dans un groupe de musique. Qu'est-ce qu'on est censés faire maintenant qu'on a deux-trois compos dans les poches ? On est en train de faire évoluer un projet, ça fonctionne mais si on a envie que notre musique touche un public, selon vous, qu'est-ce qu'on va faire concrètement ?

1 : Je pense que ce sont les réseaux sociaux, principalement Instagram. Dès qu'on a envie de communiquer sur quelque chose, on ne va même pas se poser la question, ça va être une Story ou une nouvelle publication et c'est efficace de cette manière-là. On n'a jamais vraiment essayé autre chose.

4 : Si je peux utiliser le terme « kickstart », si on va kickstart le projet qu'on a en termes de visibilité, de toucher des publics et tout, j'ai l'impression que quelque chose qui marche très

bien aussi, ce sont les partenariats avec des organisations plus grandes et plus connus ; le fait de faire des premières parties de certains artistes ou le fait de faire ou le fait de jouer en festival ou quoi.

M : Et là, les exemples que tu donnes, c'est de la performance live, c'est parce que tu penses que c'est par là que ça vient ou tu as d'autres exemples ?

4 : Non, je pense que c'est pas que par les réseaux que ça vient aussi mais je pense que c'est l'autre grand canal de efficacité avec les réseaux sociaux.

Il faut gérer tout on va dire tout l'aspect un peu plus utilisé « influenceurs », le fait de balancer constamment des stories, d'essayer vraiment de faire vivre le groupe dans la tête des gens, d'essayer de le faire se sentir encore une fois proche ce que l'on vit et sentir communauté. Toucher la popularité, percer, etc.

3 : Je pense qu'il y a vraiment cette notion, maintenant, comme tu dis que les gens doivent se sentir proche de nous via les réseaux sociaux, notamment. Ils voient l'envers du décor d'une répétition ou d'un enregistrement, comment ça se passe ; tout ça pour qu'ils soient « impliqués », investis dans ce que tu fais. C'est important qu'ils voient d'autres aspects que juste l'aspect musical. Ça peut même être au point de vue de la personnalité ou quoi.

4 : L'idée que les gens doivent mieux nous connaître au-delà de notre musique, quelque part c'est aussi ça qui se passe si on joue avec un grand groupe. Par exemple, ils peuvent se dire « tiens, ces gens-là ont joué avec machin et moi j'adore machin donc je connais un peu plus d'eux ».

3 : Je parle aussi vraiment de l'intimité personnelle des gens. L'autre jour, on regardait le compte de Matthew Bellamy qui montre ses enfants, ça n'a littéralement rien à voir avec son projet musical. Pourtant, il le fait et les gens peuvent le connaître lui-même et peut-être avoir plus envie de d'aller écouter ce qu'il fait parce qu'ils vont peut-être dire : « ah, ce gars est génial, ses idées aussi, etc. » Aussi, beaucoup d'artistes revendiquent leurs opinions politiques ou défendent certains mouvements ouvertement comme pendant cette crise ou avec Black Lives Matter. Peut-être que tous ces autres aspects (non-musical), c'est aussi plus une casquette d'influenceur.

M : Du coup, pour conclure au moins cette partie-là parce que je pense qu'on a abordé un point essentiel qui est le point des réseaux sociaux. C'est plutôt vous qui l'avez amené donc c'est chouette. Du coup, est-ce que vous êtes en accord avec cette manière dont les choses évoluent ? C'est quoi votre point de vue, en tant que musicien, de savoir qu'on va devoir publier sur les réseaux sociaux ? Ça vous fait plaisir de partager ça avec votre communauté ? Ça vous provoque de l'anxiété ? Vous avez l'impression qu'on entre dans votre intimité ?

4 : En fait, moi je t'avoue que ça me touche vraiment très peu finalement. J'aborde ça en me disant que c'est simplement la manière dont ça fonctionne aujourd'hui. Ça ne me touche ni négativement ni positivement. A une autre époque, ça aurait été différent et ça aurait été d'autres canaux avec leurs avantages et leurs. Je vois pas mal de trucs positifs (même si ça me fait toujours me poser une question sur le sens profond). Au-delà de ça, d'un point de vue personnel et plus terre à terre, je me dis que ce sont simplement les leviers sur lesquels on doit agir aujourd'hui et peut-être que demain ça sera des leviers différents, c'est comme ça que je vis ça personnellement.

M : Ok, et du coup tu acceptes ça comme c'est en fait ? Ça ne te dérange pas, en tant que musicien, de devoir passer par là.

4 : Ça ne me dérange clairement pas, ça ne me plaît pas spécialement à outrance non plus parce que je vois vraiment du négatif et du positif.

1 : Pour relever les aspects positifs des réseaux sociaux. Première, je trouve que ça te laisse le choix contrairement à d'autres médias et à ce qui se faisait avant. Je pense, par exemple, qu'avant, c'était plutôt via des conférences de presse ou des choses comme ça que des artistes pouvaient se montrer ou exprimer des opinions. Ici, c'est différent et je pense, par exemple, l'homosexualité de Freddie Mercury les choses se passeraient certainement bien différemment aujourd'hui. Donc, le fait qu'on garde encore le choix de ce qu'on a envie de publier ou non, c'est pour moi un aspect (peut-être le seul) sain.

3 : Aussi, ça peut permettre de faire passer certains messages qui nous tiennent à cœur. En revanche, sur un aspect plus technique, je vois quand même ça plus comme une contrainte mais c'est parce que je ne suis pas fort sur les réseaux sociaux. Du coup, c'est pas du tout un automatisme chez moi que de faire ça et personnellement, je crains que ça casse l'aspect naturel de la situation. Maintenant, est-ce que c'est ça qu'on demande aussi, je n'en sais rien. Mais, c'est clair que ça devient un nouveau enfin un nouvel espace de liberté et ce n'est pas plus mal.

1 : J'aime à croire aussi que ça que ça réduit le travail des des paparazzi. Si quelqu'un a envie de savoir où Christophe Maé a passé ses dernières vacances, il lui suffira d'aller voir sur son compte Instagram (en évitant les photos dans les magazines prises derrière un buisson, peut-être même sans l'autorisation de la personne). Il y a vraiment du positif et du négatif.

3 : Je pense qu'il faut faire attention à ne pas franchir des limites qu'on a pas forcément envie de franchir et tomber dans des trucs qui pourrait desservir le groupe (bad buzz ou polémiques).

1 : Attention qu'il y a justement beaucoup de personnes qui se font connaître comme ça et même si on dit qu'« il n'y a pas de mauvaise pub ». Parfois, les bad buzz et les polémiques, ça arrange bien certains en termes de visibilité.

3 : Ah oui oui mais moi là, je parle en tant que moi, et j'ai pas envie de me faire connaître par un bad buzz. Si on partage quelque chose, c'est qu'on a réellement envie de le partager et pas tomber dans un truc où on se sent forcés de partager notre intimité de groupe ou notre intimité personnelle quoi.

1 et 4 quitte la discussion (car ils sont attendus autre part).

2 : Pour moi, je ne suis ni influenceur ni community manager, ce sont de vrais métiers. Donc, ça se détache quand même de mon image qui est une image de musicien. C'est pas quelque chose dans lequel je veux investir mais c'est pas quelque chose qui me dérange non plus. Je vois vraiment ça comme un métier, en fait, et un métier qui n'est pas pour moi quoi. Par contre, le fait d'être exposé ne me dérange pas ; c'est plus toutes les démarches.

M : Dans l'idée, imaginons si tu veux quand même développer l'aspect réseaux sociaux en tant que musicien, t'aurais plus envie de passer par une équipe qui s'en occupe, de déléguer cette responsabilité ? Ta présence sur les réseaux en tant que musicien ne te dérangerait pas, juste que tu n'en ferais pas une activité à toi.

2 : Oui c'est ça.

3 : Ouais moi j'ai un peu j'ai un peu le même que 4 de de ça me dérange pas d'être affiché sur les réseaux sociaux enfin qu'on me voit sur les réseaux sociaux et tout ça mais de moi être à l'initiative de ça enfin je sens que c'est compliqué quoi

M : Je rebondis sur ce que vous dites tous les deux parce que vous assez d'accord. Par exemple, si ça passe par la page Instagram How To Six et que c'est un autre membre du groupe qui gère, par exemple moi, il n'y a pas de contre-indication à priori ?

2 : Non pas de soucis

3 : Oui, c'est juste je ne veux pas m'en occuper moi-même.

M : Est-ce que ça remets en compte l'aspect nécessaire de la chose ?

2 : Je rebondis d'abord sur ce que t'as dit. En gros, je trouve ça bien aussi que il y ait cette communication entre nous, même si c'est toi (Mathilde) qui gère ça : discuter du fil conducteur que tu veux, quelle publication prochainement, ce qu'on veut montrer, ce qui sera prêt à ce moment-là (en termes de compos, notamment), Etc. En gros, quelque part, on participe aussi à ça mais on n'est pas.

M : Oui, donc que ce soit discuté entre nous mais tout le monde ne doit pas forcément s'occuper de la page in fine.

2 : Je parle aussi en termes de ligne du temps. Tu vois, en Septembre on a lancé la page Instagram parce qu'on était au gîte et on a publié quelques photos puis on a plus alimenté donc la page est un peu morte depuis et je suis pas sûre que c'était la meilleure chose à faire à ce moment-là, même si ça nous a fait marrer.

M : Oui je suis d'accord avec toi, ce n'était pas stratégique, maintenant je ne pense pas qu'on puisse réellement se « casser la gueule » sur les réseaux sociaux et un compte qui n'a pas été alimenté pendant un certain temps peut toujours se remettre à flot. C'est vrai que ce n'était peut-être pas le meilleur move mais ça nous a fait plaisir sur le moment.

2 : Oui c'est sûr. Du coup, tu peux répéter la question ?

M : Est-ce que ça remet en cause la nécessité d'être sur les réseaux sociaux ? Ou vous trouvez quand même, malgré tout, qu'il y a besoin d'avoir une présence à ce niveau-là si on veut être médiatisé mais dans le sens : que notre musique soit connue et qu'elle soit écoutée ?

3 : Je trouve que l'aspect commercial, promotion et visibilité se jouent au niveau des réseaux sociaux donc pour moi, oui c'est essentiel. C'est une chance que tu sois plus investi là-dedans que moi ou 4, par exemple. Maintenant, si c'était vraiment une nécessité en mode « on s'y mets tous », alors je le ferai. Dans le cadre d'un projet indépendant en solo, j'engagerais un community manager parce que, avec ma personnalité, j'arriverais pas à investir le truc correctement et à faire que ça fonctionne correctement.

2 : Assez d'accord

M : Pour rebondir, c'est plus une parenthèse : j'aime bien j'aime bien sans aimer. Enfin, je vois tellement l'aspect nécessaire que je le fait. Mais quand on y pense, pour Maun, j'avais qu'une envie, c'était de publier ma musique et pas forcément de devoir penser à toute la com autour, d'ailleurs je n'ai pas été exemplaire à ce moment-là en termes de marketing et de promotion. Dans les faits, il fallait que je fasse de la com autour si je voulais que le soir les gens me voient. Bêtement par rapport à l'algorithme Instagram, à un moment donné si tu ne publies pas de Story avant de mettre une publication et que tu ne la présente pas, elle sera moins rendu visible. Mais j'avoue que dans un futur (plus ou moins lointain), le groupe fonctionne et on est rémunéré correctement, à ce moment-là je préfère déléguer ça, on est d'accord. Une personne pour gérer page du groupe en tant que telle pour ne plus avoir que ma page personnelle à gérer. Ça ne veut pas dire que je n'apprécie pas le faire, c'est juste une source de contrainte en plus pour moi que j'aimerais voir déléguée plus tard. Je pense qu'on va en rester là, si ça va pour vous.

2 : Moi, je suis bon.

3 : Moi aussi.

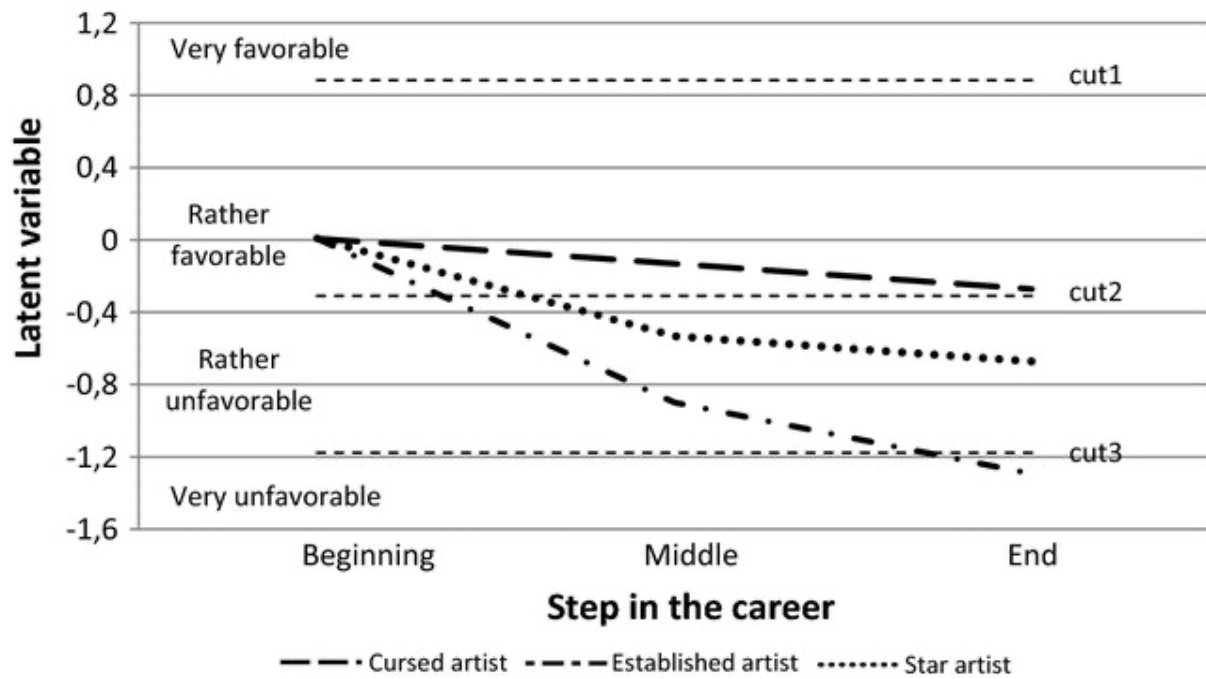
M : En tout cas un tout grand merci, je le renoterai sur le groupe parce que je pensais que ça allait autant déborder en termes de temps

2 : Pas de soucis, on a beaucoup divagué aussi.

3 : Oui mais voilà, en tout cas merci pour le temps que vous m'avez accordé, c'est toujours un plaisir de discuter de ça avec vous. Merci pour vos réponses honnêtes et éclairantes.

Appendix G. The evolution of artist's behaviour towards free streaming

(Aly-Tovar et al., 2019)



Appendix H. The strategic launching guide for indie musicians

The complete and commented "strategic launching guide for indie musicians"

1. Kick-off team/band meeting

This kick-off session consists of a general discussion about the future vision that will help build the shared vision, the strategy, and the objectives. At this time, it is crucial to decide a pace for meetings to follow. It is also the time to discuss the band's (or musician's) image: the logo, the digital image/persona, the aesthetic and ethos. To define the image correctly, the different members' personalities must be understood and taken into account to target the various tasks appropriately (knowing what to internalise and what to outsource first and second times). The strategy should be framed in a calendar to be practical and achievable.

How To Six has weekly rehearsals and try to maintain regular discussion time, generally every month. It is pretty intuitive for the moment and follows a shared desire to take some time to make a point. The last year has been struggling as we lost our bearings. In fact, we are primarily live musicians and used to organise our calendar around the dates of the events we participated in. However, Covid pushed us to manage and think as a group, which has been beneficial for our future as we know we have live experience and 'studio' habits.

2. Launch social media

Multihoming is a must for musicians meaning that they should use the different trendy/essential social media like Facebook, Instagram, Tik Tok, Etc. This step is dedicating to develop a solid network. It implies a certain regularity for posting on each social media at the early stages and interacting with the audience, keeping in touch with potential partners and developing the necessary clue to be heard by actors in the industry.

3. Copyright and other regulations

A band or a musician should get informed about rights, intellectual property regulations, fund musical projects, earn revenues, and eventually share them.

How To Six has not yet addressed the issue.

4. First release(s): production phase

Musicians should plan their first release production reasonably. It can be one song or an EP. Still, it must be scheduled responsibly to ensure the successful completion of necessary registration and post-production steps and lower to the minimum the budget allocated, which is already not very high. In parallel, booking live events is essential to strengthen the launching strategy and prepare the next steps. The first song(s) a band releases should be chosen carefully

as it will determine the image of the band, its genre, and audience. It must therefore represent the band and its style well.

How To Six decided not to release the first song they recorded as it does not reflect the unique musical universe of the band neither its music genre in general. The first piece of a band should be iconic and allow listeners to identify the genre and influences. Once the first song is out, musicians should have other pieces of music in stock and a precise release schedule in mind.

5. Massive **social media promotion campaign** for the first release(s)

The musicians tease their future musical release intensively in the weeks preceding the actual release.

6. Launch release(s) on **streaming platforms**, generally via an intermediary such as an independent label or an aggregator

Musicians, as seen previously, should consider launching release(s) on **free** streaming platforms too like YouTube to extend their impact and reach a larger audience of potential fans and partners.

7. Analyse **data** about the audience

Thanks to tools like *Spotify for artists* and other devices provided by platforms, musicians can learn about their audience as well as their listening content. Once music is on platforms, it should be monitored and analysed to ensure the best performances.

8. Get music played on **playlists**.

Thanks to other artists and keywords, an excellent way to get played on the playlist is to define your music genre.

In the case of *How To Six*, we struggle defining our style as we are constantly innovating, in a sense, but we have agreed on five keywords like *alternative rock*, *indie rock* or else *pop-rock*.

9. Take part to a maximum of **live events**: concerts, festivals and events organised for young artists.

Artists should seize all the opportunities available to the band/ the musicians, like broadcasting music on the radio or being interviewed. Live events allow for enlarging the audience, showing personality and music abilities, strengthening current relationships with fans, and getting known by other actors on the music market. The setlist is also strategic and should tell a story to offer an immersive experience into the band's universe.

This step is critical. First, it is the best way to get revenue. Second, fans are demanding a unique experience and can discover your music through live performance. Once again,

musicians should keep their strategy and objectives in mind and pursue a red thread to stay consistent for their audience and potential partners.

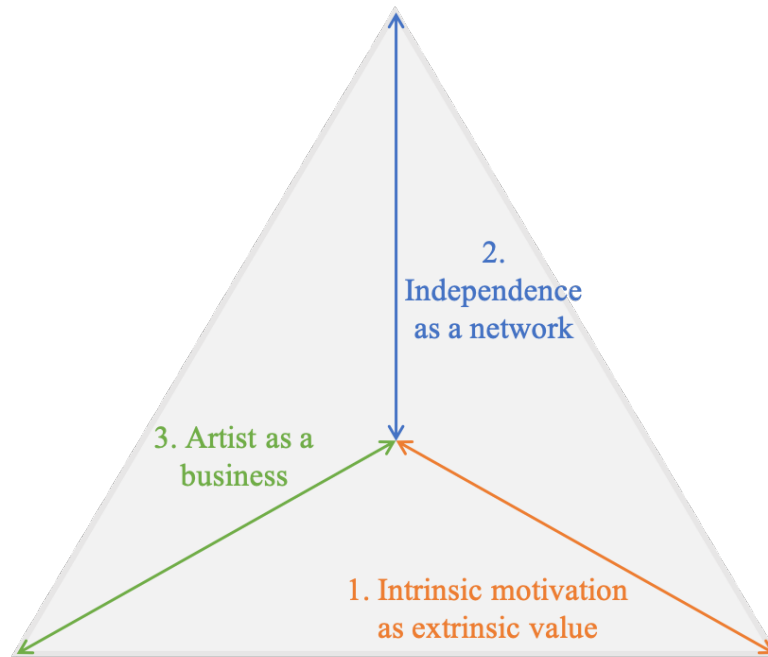
We, *How To Six* members, really love performing live and are waiting for the COVID crisis to stabilise, expecting that we will participate in live events before the end of this year.

10. Feedback team/band meeting about three main aspects being streaming, social media and live performance.

This meeting aims at:

- Discussing potential revenue sharing,
- Considering the production of physical releases (as the focus is made on Indie Rock musicians, physical records like pieces of vinyl are trendy for the moment) and
- Reviewing the strategy, vision, and new objectives to prepare the next project (sort of Kick-off session for the following musical project).

Appendix I. The indie music triangle



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