Behind the Music:

How Labor Changed for Musicians through the Subscription Economy

Student Name: Saskia Mühlbach
Student Number: 486342

Supervisor: Dr. Payal Arora

Master Media Studies - Media & Business
Erasmus School of History, Culture, and Communication
Erasmus University Rotterdam

Master's Thesis
June 2018

BEHIND THE MUSIC:
HOW LABOR CHANGED FOR MUSICIANS THROUGH
THE SUBSCRIPTION ECONOMY

Abstract

In the last decade, many musicians have taken to digital platforms to share their music. The provision of users with low or no cost access to vast libraries of music initiated a decrease of the role of middlemen in the industry, such as record labels. This development comes with certain advantages for artists, but at the same time, they can no longer rely on revenue generated solely by their music, due to the pay-back model of these platforms. There is growing evidence of exploitation of the creative workers in the subscription economy. While the perspectives of music platforms, as well as record labels, have been covered extensively, the artist perspective is alarmingly sparse. We know little of musician's new forms of labor that enable them to capitalize on streaming services.

Hence, this paper examines how the labor of artists in the music industry changed through the rise of streaming platforms, specifically in the context of Germany, the fourth largest music market in the world. To date, little research exists regarding the German music market and its digital growth. If we want to investigate the global implications of the subscription economy, it is essential to move beyond the usual suspects of the United States and the UK as chosen contexts for research.

In this research, a qualitative analysis of the contemporary German music market from the artist perspective was carried out. In the course of this, thirteen semi-structured in-depth interviews with German musicians were conducted to investigate how their labor changed due to the rise of streaming platforms. The findings show that artists no longer perceive their music as a product, but as a marketing tool for their brand. Further, the gradual elimination of the album as an artistic element and the enormous competition caused by subscription services pressures artists to produce solely hit singles. Other than that, the creative process is not extensively impacted through the datafication, facilitated through subscription services. The non-creative process and the perception of music as a commodity has changed tremendously. Thereby, artists leverage on the data that platforms provide to support their non-creative tasks. Further, new intermediaries in the market have emerged in the

form of digital distributors, which enable artists to share their music for a small fee on all available digital platforms. Through the increased amount of time which is needed for non-creative tasks, the wish for an even broader intermediary network becomes obvious. It can be questioned whether this provides artists with more creative freedom or if they find themselves in an even more exploitive and precarious position. As expected, the perceptions of artists regarding their platform labor are double-edged. While they perceive a big pleasure and satisfaction through their work, they get burdened with new non-creative laboring due to these rising subscription services.

To conclude, this paper adds to the conversations on the globalization of music platform's labor and provides a basis for comparative analyses with other markets. It serves to reimagine the intersection between creativity and digital labor in the German music subscription industry and challenges current understandings on intermediaries in the music industry.

Table of Contents

Table of Figures

[Preface]

To Payal, my supervisor: Thank you for everything – not just for guiding me through these thesis months but also for inspiring me way back, in the first term, with your worldview. Your course, this thesis, and you as a person motivated me to scrutinize circumstances that we so often take for granted and, therefore, not only let me become a more reflective and critical researcher but also a more contemplative person. Thank you also for always being understanding and for pushing me to reach higher.

To my interviewees: I am incredibly thankful that you gave me your valuable time and shared so many very personal stories and feelings with me. Your insights paved the way for this thesis and opened my eyes. I hope my findings will do the same for you.

To my fellow Media & Business students – you know who you are: Thank you for sharing this whole process with me – the ups, the downs and the times in between that passed way too fast. I am incredibly thankful that I got the opportunity to get to know each one of you. I will keep this time in my heart and miss it like hell.

To Dennis: I am so thankful that we made this experience, this Master in Rotterdam, together – I would not know what to do without you by my side.

1   Introduction

Chance The Rapper is considered one of the biggest rap talents of our time (Shamsian, 2017). He is an excellent example of how musicians nowadays are managing their music on streaming services such as Spotify and Apple Music.

Chance made history as the first artist who won a Grammy for a streaming-only album (Shamsian, 2017) and was also named 'one of the most influential people in the world' by the Times Magazine in 2017 ("The 100 Most Influential People", 2017). What additionally makes him so special is that while achieving this success he refused to sign a record contract from the beginning. Through that, he is the most successful independent musician of our time. Starting in Chicago's hip-hop scene, he distributed his first album via *DatPfiff* and received a total of 400.000 downloads. A year later his album *Acid Rap*, which was downloaded over a million times, made him exceptionally popular. In 2015, he became the first unsigned artist who performed on *Saturday Night Live*. After that, he collaborated with Kanye West on a few songs and finally released the Grammy-winning album *Coloring Book*, in which he expresses his hate for record labels, in 2016. It became the first streaming-exclusive album on the top-10 Billboard charts. Somehow, he managed to achieve such success while only relying on word-of-mouth and his SoundCloud account for distribution (Shamsian, 2017), at least until his 2016 album for which he chose another direction that confronted him with criticism. Despite him never getting into close contact with a record label, fans now question his independence. A deal he made for the release of *Coloring Book* with Apple Music enabled the streaming service to exclusively distribute his album in the first two weeks after release. Apple, in turn, paid him half a million dollars and made a commercial for the album. He then defended himself via Twitter, stating that his actions did not take him his integrity (Phillips, 2017) and that "artists can gain a lot from the streaming wars as long as they remain in control of their own product" (Chance the Rapper, 2017).

In fact, in the last few years, many musicians have taken to digital platforms to share their music. Yet, we know little of musician's new forms of labor that enable them to capitalize on streaming services. Hence, this thesis examines how the labor of artists in the music industry changed through the rise of streaming platforms such as Spotify and Apple Music. The provision of users with low or no cost access to vast libraries of music initiated a decrease of the role of middlemen in the industry, such as record labels. This development

comes with certain advantages for artists but also challenges especially independent musicians to position themselves in the market on their own next to established companies (Schwarz, 2014). At the same time, they cannot rely on making revenue out of the music due to the highly discussed pay-back model of these platforms, which favors artists that get many clicks, but neglects smaller artists (Marshall, 2015). Therefore, live performances and merchandise become the main streams of revenue for artists (Tilson, Sørensen & Lyytinen, 2013). However, independent artists need to handle these emerging forms of labor themselves, which makes it even harder for them to compete in the market with big record labels. Schwarz (2014) states that this shift confronts artists with the burden to become solitary entrepreneurs whereas Drahokoupil and Fabo (2016) contradict these claims by stating that by now the Sharing Economy mainly reorganized markets that already relied on self-employment, such as the music industry itself. The upcoming thesis contributes to this debate by investigating how artists themselves assess the change in labor, specifically in the context of Germany.

The Sharing Economy is as an umbrella concept over several information and communication technologies which promote the sharing of consumption of goods and services through online platforms. The Sharing Economy led to the disruption of various markets by motivating consumers to change their typical consumption behavior to activities such as renting, swapping, or trading. An example of such disruption is the one caused by AirBnB within the travel industry (Hamari, Sjöklint, & Ukkonen, 2016). Many consumers that previously booked hotel rooms for the holidays or business trips switched to renting apartments or rooms from private persons. Cave (2016) proposed the idea of the Subscription Economy as the new Sharing Economy as both are based on the move from product to service and the giving-away of ownership. The Subscription Economy includes subscription-based business models, such as Spotify, which gradually replace the conventional pay-per-product (or service) approaches (Whitler, 2016). However, even though the Sharing Economy enables disruptive innovations of established business models (Cheng, 2016), such as explained above, it is sharply criticized as the architect of a growing precariat (Schor, 2014). Further critics claim that Sharing Economy platforms preserve centralism, hierarchy, and capitalism (Pick & Dreher, 2015). Nevertheless, there is little evidence if this criticized shift of uncertainty from employer to employee and the accompanying exploitation is the case for the Subscription

Economy, which is what this thesis, therefore, shall examine. Furthermore, there is much focus on the consumer side but far less on the producer side of this debate. This thesis, therefore, focuses on the musicians instead of the music consumers to fill this gap.

Research conducted by Hracs (2012) on independent artists, has already shown the shift in labor after the digitalization of music in the past decade. He found that, next to creative labor, including for example songwriting, rehearsing or video production, artists suddenly needed to face non-creative types of labor. Those can be divided into technical, managerial and business tasks and required a high amount of their power, time and money. Hracs (2012) research can be seen as a landmark study of musicians' labor for this thesis. Nevertheless, how labor changed for all artists in the context of subscription platforms is to date, scarcely researched. Therefore, this thesis is going to extend previous investigations by looking at the outcomes of a more current disruption, namely the one caused by the subscription industry. Further, it is going to research this shift not only for independent but also for those artists who work with a record label. This approach aims to generate a comparison of both types of artists regarding their tasks and perceptions.

The German music industry is the targeted context for this thesis. The geographical decision was made because of Germany's status as the fourth largest music market in the world, competing in a neck-and-neck race against the United Kingdom (International Federation of the Phonographic Industry, 2017). The German market has its specific characteristics with a different juridical background, promising new forms of regional specific practices in this industry. To this date, little research exists regarding the German music market. If we want to investigate the global implications of the subscription economy, it is essential to move beyond the usual suspects of the United States and the UK as chosen contexts for research. This thesis adds to the conversations on the globalization of digital labor and provides a basis for comparative analyses with other markets. Nevertheless, due to market specifications, the generalization of these findings need to be taken cautiously. However, the researcher is going to provide a detailed analysis to increase the reliability of the findings and therefore their applicability. Moreover, the researcher can conduct the interviews in her mother tongue, which helps to avoid a distortion through translation mistakes of interviewees.

Hence, the focus of this thesis lies on musicians in Germany and their perceptions on how their labor changed due to the rise of streaming platforms. This includes creative processes as well as non-creative processes, such as marketing or financial compensation. In

other words, is the subscription economy empowering or exploitative to the musicians today? Subsequently, the research question is the following:

RQ: How has the labor of German musicians changed with the rise of streaming platforms?

The first subquestion covers how musicians make themselves competitive on streaming platforms, so based on Hracs (2012) how their managerial, technical and business-related tasks but also their creative processes have changed. Therefore, the subsequent question is the following:

SQ1: What do musicians do to make themselves competitive on these streaming platforms?

Another crucial question is who the middlemen and intermediaries between artists and consumers nowadays are and how the relationship might have changed between them. Therefore, the third subquestion is the following:

SQ2: How has the role of traditional middlemen and intermediaries in the music industry changed?

It is further essential to investigate how musicians perceive their work, so whether they feel treated justly or exploited. This question shall also include if they are satisfied with their compensation, in other words, if they perceive the received wage for their work as fair. Concluding, the second subquestion is the following:

SQ3: How do musicians perceive the changes in labor after the rise of streaming platforms in the music industry?

To further draw comparative conclusions about the change of labor the conditions preceding the rise of streaming platforms are going to be covered through an analysis of relevant literature as presented in the theoretical framework.

The flourishing labor debate around the Sharing Economy shows a particular interest for society and science to study these changes in the Subscription Economy. The first literature review showed that whereas the perspective of Spotify, as well as record labels, was covered extensively (Bhatt, 2017; Meier, 2014; Schwarz, 2014; Tilson et al., 2013), the artists perspective is lacking in scientific coverage. Even though Hracs (2012) examined independent artists after the first significant disruption of the music industry, the perspective of artists af-

ter the rise of subscription platforms is to data lacking in scientific coverage. Further, as explained above, the Sharing Economy led to highly criticized developments for workers (Cheng, 2016; Schor, 2014) and even to exploitation accusations (Pick & Dreher, 2015). Nevertheless, the Subscription Economy as part of the Sharing Economy has not been adequately researched as possibly fueling injustice for these creative workers.

It is essential to keep up with new forms of labor to understand and show possibly emerging forms of exploitation in the music industry. The shifts in relations within the industry, especially regarding the role of middlemen, need to be understood to identify if artists are facing an unjust system. Through this research, struggling artists could find possible solutions and inspirations within the approaches of fellow musicians.

In the upcoming chapters, first, a theoretical framework is going to be proposed. Then the methodology used for this research will be presented, for which qualitative interviews were chosen. In the end, the findings of this research are going to be presented and discussed.

2   Theoretical Framework

The theoretical framework proposed in this section is going to cover the topics *The Sharing Economy, The Transformation of The Music Industry*, *The Change of Musicians' Labor* as well as *The German Music Industry.* It, therefore, provides the theoretical base that is needed to understand the recent changes in labor and grasp the already existent discourses around the Sharing Economy and the music industry.

2.1   The Sharing Economy

The first primary section is going to span around the profound topic of the Sharing Economy by drawing a picture around its disruptive force and its impacts on amongst others cultural sectors. Further, a critical presentation about current discussions regarding cultural and digital labor is going to follow. The first theoretical chapter of this thesis shall enable the reader to grasp the status-quo of the discussions that underlie this research project. Further, it shall reveal certain shortcomings in literature, which this thesis aims to reduce.

2.1.1   Discussing the Sharing and the Subscription Economy

As mentioned in the introduction, the Sharing Economy, and as part of that the Subscription Economy, facilitated disruptive innovation and with that the disruption of established business models (Cheng, 2016). For example, subscription services like Spotify or Apple Music enabled the sharing and surrendering of ownership and connected music to an unprecedented social aspect. They do that by offering the possibility for users to share their own playlists and follow their friends' activities. Cheng (2016) states that consumers use Sharing Economy products as a form of resistance to the capitalist economic model and to raise awareness for, amongst others, sustainability and overconsumption. Further, Richardson (2015) describes the Sharing Economy as a narrative of collaboration and community which therefore invites the deconstruction of practices of dominance (Richardson, 2015). Nevertheless, critics such as Pick and Dreher (2015) contradict this argument by stating that Sharing Economy platforms further perpetuate centralized, hierarchical and capitalist systems and forbid societal transformation. Cockayne (2016) even interprets the usage of the term *Sharing* as a "normative script for narrating on-demand work" (p. 80) and as "a strategy for talking about work in sentimental terms" (p. 80). He sees the usage of the term as an attempt of on-demand activity proponents to implement the sharing of property as something

that virtuous and altruistic people should do in an authentic and just society (Cockayne, 2016).

Richardson (2015) summarizes the ambiguity of the Sharing Economy: It can be framed both as a part of the capitalist economy as well as an alternative. In other words, it simultaneously positions itself as a counteragent to the existing economy while reinforcing isolation and separation and masking new forms of inequality and polarization of ownership.

The process of *platformization*, so the extension of social media platforms into the rest of the web (Helmond, 2015), transformed the music industry significantly. In this context, the word 'platform' is going to be used concerning a definition by Gillespie (2010), who stated that platforms are infrastructures that enable the design and use of applications and further connect various actors to communicate, interact or sell. Through the process of platformization, for example, cultural entrepreneurs are reassembling the way they produce and circulate. *Datafication*, so "the systematic collection and algorithmic processing of user data" (Poell, Duffy, Nieborg, Prey, & Cunningham, 2017, p. 1) caused a change from editorial to more demand-driven approaches when it comes to production and distribution. This leads to cultural commodities not only being modularly designed but also continuously reworked and repacked based on user data (Poell et al., 2017). Spotify provides an excellent example for that because it enhanced, e.g., the *cherry-picking* of songs by customers. Such shifts in consumer behavior force cultural entrepreneurs to change the way they produce, distribute and market their product (Poell et al., 2017).

Concluding, the disruptions caused by as well as the problems within the Sharing Economy can directly be linked to the Subscription Economy. Therefore, the seriousness and range of the labor debate within the Sharing Economy justify the relevance for researching this area within the subscription-based music industry.

2.1.2 Digital and Cultural Labor in the Sharing Economy

Graham, Hjorth, and Lehdonvirta (2017) researched how global digital labor platforms, as well as the on-demand economy, influenced the livelihood of workers. What they found was that even though these innovations brought many perks and are often framed in contrast to the alternative of mass unemployment, digital workers suffer under specific market structures.

On the one hand, those platforms enable workers to combine work with other commitments or responsibilities and position them closer to the customer as they get much

more insights into the customers' needs. Further, they facilitate the inclusion of economic development for workers who, before, were constrained because of their educational or geographical background. Moreover, they help to connect people from all over the world and provide the possibility for workers to tap into new international markets (Graham et al., 2017).

The geographical boundlessness, however, also leads to non-transparent labor networks which cover exploitative work practices and inhibit solidarity between workers, which otherwise could proceed jointly against violations of worker protections (Cockayne, 2016; Graham et al., 2017). These platforms consider workers solely as independent contractors and try to minimize the influence of the outside on the employer-employee relationship. Further, they provide employers with a wide choice of employees, which results in a turning towards the cheapest provider. This, further, leads to a strong feeling of disempowerment and a decrease in the bargaining power of workers (Graham et al., 2017).

Next to the disintermediation in the market, caused by the direct worker-client contact those platforms facilitate, Graham, Hjorth, and Lehdonvirta (2017) found evidence for a certain reintermediation. Those new intermediaries can have a positive influence on the work process, e.g., through taking over quality control or the assignment of activities. On the other hand, they can be seen as a new interfering factor that could capture part of the earnings formerly belonging to the producer (Graham et al., 2017).

An example for this reintermediation can be found in the art market: New voices added to the market in the digital era question common understandings, such as the hierarchy in the art world (Arora & Vermeylen, 2013b). Consumers' voices became more authoritative as they "are becoming increasingly involved in art evaluations and in doing so, are at the very least challenging if not eroding the role of the traditional gatekeepers" (Arora & Vermeylen, 2013, p. 25).

Moreover, critics point out that the impetus for sharing is often not trustfulness but desperation and even accuse Sharing Economy platforms of fostering precarity for workers (Schor, 2014). While taking part in the Sharing Economy can contribute financially to the workers' lives, if it becomes the sole source of income it results in the casualization of labor without social security coverage (Cheng, 2016). Das (2017) even describes the Sharing Economy as a "Dickensian world for workers" (para. 21), where the risk of economic uncertainty

has shifted from employer to employee (Das, 2017; Pick & Dreher, 2015; Schor, 2014). Nevertheless, Graham, Hjorth, and Lehdonvirta (2017) remind one that capitalist systems have always been criticized for exploitation and power imbalances and that the question rises if just too much was expected from the digital labor market (Graham et al., 2017).

This section presented the advantages as well as disadvantages of the disruptive force that the Sharing Economy proved in several markets. Further, the labor discussions around the impact of the Sharing Economy on the livelihood of workers were introduced. However, Cockayne (2016), points to the need "for further research into the relationships between flexible and precarious work, the conventional troping of work that justifies particular working practices over others, and changing technologies" (p. 80). He stresses that the analysis of the topic needs to be conducted on a "platform-by-platform basis" (p. 80). After this section explained the in-depth discussions and the importance of the topic, this thesis is, therefore, going to add to the discussions with a holistic viewpoint on the developments in the music subscription economy.

2.2 The Transformation of the Music Industry

This second section is going to provide a frame around the two significant disruptions faced by the global music industry in recent years: first, the digitization of music and second, the rise of the subscription economy. It, therefore, prepares the readers with a knowledge base to comprehensively assess the market changes that influence the livelihood of musicians.

2.2.1 The First Disruption – The Digitization of Music

Taking a step back and looking to the 1950s, 60s, and 70s, the music industry was composed of various record labels of different sizes, located in different regions and varying in scope and power. In the 80s and 90s, this landscape changed when more dominant labels repeatedly merged with smaller labels. By the end of the 20th century, the music industry was dominated by five major corporations – Bertelsmann AG (Germany), the EMI Group (Britain), Seagram/Universal (Canada), Sony (Japan) and Time-Warner (U.S.). Musicians at that time who signed contracts with these corporations only needed to focus and develop their creative abilities and were not expected to possess other, non-creative skills. The major record labels used to control every step of the music production process by themselves:

They combined commissioning and contracting of artists, pressed and packaged records, created globalized marketing, promotion, and distribution networks and further housed their own legal services, music publishing, production, sound engineering and managerial services. Therefore, musicians were dependent on their contracts with record labels as it was impossible for individual artists to collect the resources needed for e.g., music production or distribution. In exchange, they were expected to align their work with the creative vision and their availability to the organizational expectations of the company (Hracs, 2012).

Nevertheless, with the invention of MP3, the music industry faced an undeniable hurdle. In the wake of this development, so-called 'gift economies' emerged that enabled users to exchange images, movies and sound files across internet relay chat networks, such as Napster. The music industry failed in adapting to these changes which resulted in a severe decline in consumer spending and therefore revenue at the beginning of the 21st century. In the course of this setback, Apple used the pay-per-song model to constitute its iTunes music store as the market leader. After that, specialized music retailers were replaced by, on the one hand, the iTunes store and, on the other hand, retail giants like Wal-Mart, which took over the product range of former music retailers. This development declined the power of the majors as e-tailers, and chain stores now decided the terms of pricing, content, and distribution (Hracs, 2012). Further, the invention of the smartphone provided listeners with a device which enabled the access to digital content anywhere and at any time. Suddenly those listeners did not need to buy and download music if they wanted to listen to it outside their home (Peitz, 2018).

On the one hand, due to lower distribution costs caused by the digitization of the music market, artists got enabled to publish music independently (Hracs, 2012). On the other hand, as a consequence, labels tried to reduce risk by focusing more on artists that promised to be 'hit-makers' and signing fewer contracts. Moreover, they started to immediately end contracts if an artist was not successful enough, which left the artists responsible for his or her talent development. Hence, independent production became a vital alternative but left artists alone with new responsibilities and forced them to become entrepreneurs (Hracs, 2012).

2.2.2 The Second Disruption – The Rise of Subscription Services

The second big shift that shook the music industry in recent years can be led back to the rise of the music streaming industry through subscription services like Spotify or Apple Music. For several years the business models of these services have been seen as very promising: They either provide listeners with access to vast libraries of music for free, whereas in turn these listeners need to endure commercials, or they can pay a subscription fee to enjoy an unlimited number of songs undisturbedly (G. D. Nguyen, Dejean, & Moreau, 2014; Peitz, 2018). After the desperate phase of the music industry in the past decade, in which the revenue of the US music industry got halved, Spotify seemed to be the light at the end of the tunnel (Peitz, 2018).

However, while Spotify is a substantial participant in this market with 71 million paying subscribers and 159 million users per month they are unable to make a profit. Lately, a loss of 1.2 billion Euros was mentioned that propelled tech giants such as Apple, Amazon, and Google to increase the pressure on the Swedish company. Amongst all those vendors, Spotify notably faced the most criticism regarding the low amount of money they pass on further to the artists (Peitz, 2018).

Subscription Services are further called out for blurring the lines between genres, which is going to be discussed in more detail later on. Therefore, popular artists feel more encouraged to collaborate with other popular artists, as the new services, compared to, e.g., radio stations, do not try to put artists in fictitious categories ("In popular music, collaborations rock," 2018). As explained above, personalized recommendations based on consumer preferences and offered by those services enable consumers to discover new artists rapidly and therefore increased competition for artists tremendously (Bhatt, 2017). Moreover, the revenue model of subscription services such as Spotify makes artists dependent on live performances and merchandising as streams of revenue (Tilson et al., 2013). So, even though proponents see streaming platforms as rescuers of the music industry, it seems as if they mostly bring advantages to consumers, record labels and themselves (Ellis-Petersen, 2017). Artists, even though blessed with a new platform to market their products, need to face an inevitable transformation of labor as they did after the first significant shift within the music industry.

Whereas the impact of digitization on the labor of artists is known, as to be seen in the following chapter, we are still in the dark about the changes artists experience with the rise

of subscription services. Therefore, this thesis is going to explore the second shift in the music industry more in-depth and from the artists perspective.

2.3 The Change of Musicians' Labor

The following chapter offers an analysis of the state of labor before the second shift in the music industry which enables the comparative analysis of the results. Additionally, the current state-of-the-art literature regarding musicians' labor in the Sharing Economy as well as regarding the discussions about cultural and creative labor is going to be summarized. Through that, gaps in research get pointed out, which then function as a basis for the analysis tool.

2.3.1 Musicians' Labor After the Digitization

In 2012, Hracs analyzed the shift in musicians' labor from creative to non-creative processes after the digitization. Even though he only researched independent artists, his findings still show how processes within the industry changed. Further, they explain with which methods artists themselves, but logically also record labels representing those artists, changed their way of producing and distributing music.

Whereas in the 1980s the choice to be an independent musician was rare when artists wanted to keep creative decisions regarding their work for their own, after digitization, not a lot of independent musicians chose this status. In 2012 over 95 percent of all musicians in Canada were not signed under a record label. Before the digitization, independent musicians were able to create music on their own, but the required capital and skills for recording, manufacturing, marketing, and distribution of these songs lied beyond their abilities. These artists needed to hire professionals to produce the songs and were not able to market or distribute analog recording mediums on their own (Hracs, 2012).

Digitization has changed these processes by lowering entry barriers and redistributing power to musicians, which enabled them to be more independent. Recording was possible from home, editing and mixing with professional and even consumer software (Bockstedt, Kauffman, & Riggins, 2006; Hracs, 2012). Digitization, further, led to a reduction of space between artists and consumers, reduced costs of replication and therefore increased importance for copyright protection (Bockstedt et al., 2006). The internet also allowed

musicians to distribute and market their music independently by setting up websites, offering music tracks in digital format globally and promoting themselves on websites such as MySpace (Hracs, 2012).

However, the new possibilities for noncreative tasks also meant new forms of labor and a wider variety of tasks (see Figure 1) that musicians needed to face.
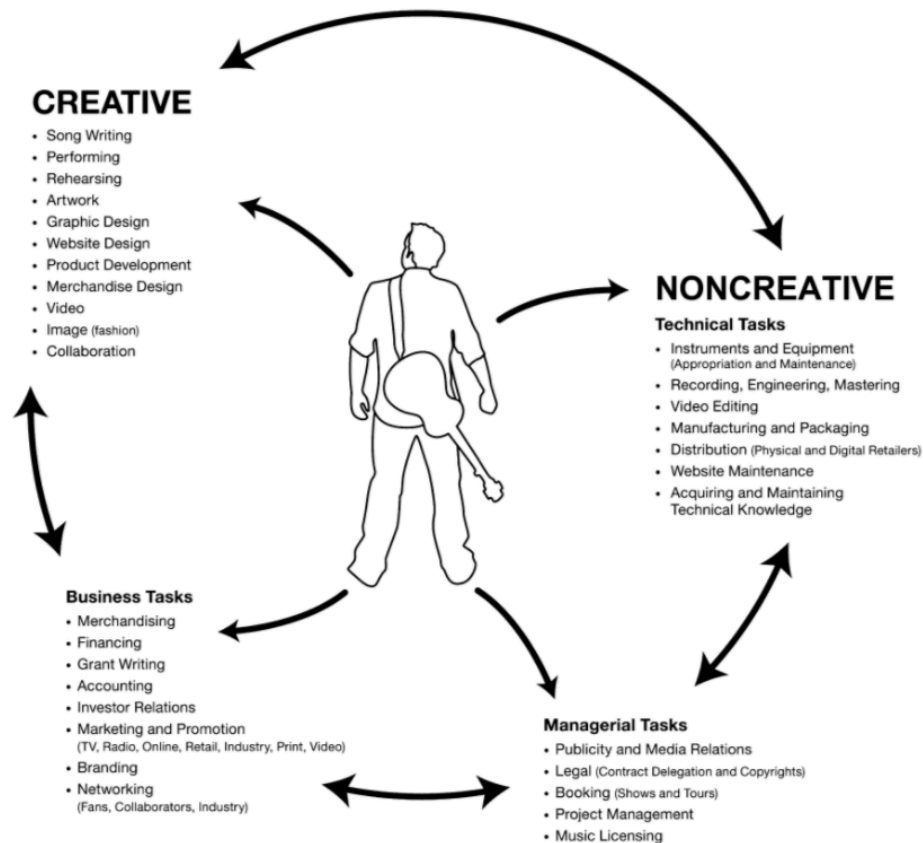

CREATIVE
- Song Writing
- Performing
- Rehearsing
- Artwork
- Graphic Design
- Website Design
- Product Development
- Merchandise Design
- Video
- Image (fashion)
- Collaboration

NONCREATIVE

Technical Tasks
- Instruments and Equipment (Appropriation and Maintenance)
- Recording, Engineering, Mastering
- Video Editing
- Manufacturing and Packaging
- Distribution (Physical and Digital Retailers)
- Website Maintenance
- Acquiring and Maintaining Technical Knowledge

Business Tasks
- Merchandising
- Financing
- Grant Writing
- Accounting
- Investor Relations
- Marketing and Promotion (TV, Radio, Online, Retail, Industry, Print, Video)
- Branding
- Networking (Fans, Collaborators, Industry)

Managerial Tasks
- Publicity and Media Relations
- Legal (Contract Delegation and Copyrights)
- Booking (Shows and Tours)
- Project Management
- Music Licensing

Figure 1: The Creative and Non-creative Tasks of Independent Music Production (Hracs, 2012, p.457)

While conducting interviews with Canadian musicians Hracs (Hracs, 2012) found that, after the digitization of music, artists spend much more time on these new tasks, such as promoting their music, booking shows or applying for grant money even though earning less money (Hracs, 2012). Some artists even started to provide free music samples online, to convince consumers for a purchase (Bockstedt et al., 2006). One of his interviewees even said "it is a full-time job, but only about 10 percent actually involves music. The rest of it is the marketing and the looking for work" (Hracs, 2012, p. 458). The findings of his research resulted in a list of creative and non-creative tasks, whereas the latter were divided into the three categories of *Technical*, *Managerial* and *Business Tasks*, as can be seen in Figure 1.

From an inclusivist approach, the umbrella term *creativity* incorporates various activities. This means it does include not only the human capacity of being original or innovative but also other rather banal practices executed with a particular artistic inspiration (Negus,

1998). This is why creative tasks of artists not only span around composition but also, e.g., the creation of merchandise products or websites. Therefore, these tasks are accordingly respected in the interviews conducted for this thesis.

Nevertheless, especially before the subscription economy, creative activities in the music industry were often understood in terms of genre, and through that, in a broader sense, in social divisions (Negus, 1998). The musical production, therefore, moved within the frame of specific genres through a "continual production of familiarity and newness" (Negus, 1998, p. 362). Recording companies especially tended to manage this process, by deciding which deals are done or which types of newness or familiarity are supported, and which are not. As Negus (1998) states: "The music industry shape[d] the possibilities for creative practice" (Negus, 1998, p. 363). Therefore, it is crucial to analyze the status quo, to see how notions of genre changed, but also to be able to draw a comparison between those artists influenced by a record label and those who are not.

Digitization, moreover, led to a detachment from the pressure to produce full-length albums, which allowed artists more freedom in their creative choices (Bockstedt et al., 2006). The intermediaries in the market, the economic agents between the artists and the consumers, "set market-clearing prices, make purchasing and sales decisions, manage inventories, supply information, and coordinate transactions" (Bockstedt et al., 2006, p. 17). The digitization evoked significant changes regarding these actors: Physical, traditional retailers were substituted by digital music retailers. Other intermediates, like manufacturers, became, nevertheless, outmoded (Bockstedt et al., 2006).

While Hracs (2012), Negus (1998) and Bockstedt et al. (2006) already researched how the digitization changed labor for artists, the following question arises: How has the transformation of the music market through streaming platforms affected labor and intermediaries for both signed and independent artists? It is crucial to question this, as both disruptions of the market changed it in a different sense. Digitalization in the first step solely transformed music into a digital form, enabling a global distribution and the saving of costs. Platformization, however, has the potential to disrupt labor markets and employment relations through its interference in the organization of work itself (Drahokoupil & Fabo, 2016). This second disruption, therefore, needs to be analyzed on its own to holistically understand the labor of artists in the context of platform-based business models which possibly fuel exploitation. Therefore, this thesis aims at providing the answer to this question.

2.3.2 Musicians' Labor in the Sharing Economy

2.3.2.1 *Monetization and Non-Creative Labor*

The low compensation artists receive for their work is the biggest point of criticism for music streaming services. The discussion regarding this topic started in 2009 when reports stated that Lady Gaga received only $167 for her song 'Poker Face', which had been streamed over a million times. Following that, some smaller US record labels withdrew their catalogs from Spotify. One record label founder even stated that Spotify only pays $0,0013 to his label's digital distributor and that whereas 5000 track downloads in iTunes made 3486$, nowadays 5000 streams only make 6,50$. As an answer to the criticism Spotify stated that they don't pay artists, but record labels. However, the fact that also independent record labels and not just artists complain shows that the contracts with record labels are not the only reason for the small revenue for artists. Even though Spotify gives nearly 70% of revenue to right holders, which is the same amount that Apple pays for iTunes downloads, it distributes the money in another way: Spotify divides the whole revenue they make out of premium subscriptions and advertisements through the number of streams. As said in the introduction chapter, this system is only beneficial for artists and labels who receive a high number of streams. If a listener only enjoys one small artist for the entire month, this one artist can only receive a small share of the listener's money, because it mostly will be distributed to the artists with the most streams (Marshall, 2015). However, the field of musicians' compensation has been examined insufficiently as no further relevant literature has been found. This thesis is also going to contribute to a closure of this gap by analyzing how artists perceive the fairness of their compensation.

Regarding the tasks artists need to face after the rise of streaming platforms, it is known that due to the decrease of the role of intermediaries more and more artists are expected to work as solitary entrepreneurs. Even though this provides them with freedom, it also challenges them to find alternative ways to monetize their content in the Sharing Economy on their own (Schwarz, 2014). Next to the creation of music, artists need to participate in branding and merchandising like never before. Leenders, Farrell, Zwaan and ter Bogt (2015) quantitatively examined these later stages in the value chain of music, namely how different clusters of Dutch artists use varying media strategies to generate revenue. They found that young, emerging artists use a broad scope of media platforms, both traditional and new. Digital age independent artists, on the other hand, specifically focus on social media, such as

Twitter and Facebook. Next to that, they also rely on live performances and the selling of their own CD's. These findings indicate, that the access to certain platforms is very resource dependent, so possible for artists with a record contract, but not for independents. Therefore, record labels still seem to be in control of the access to mass media (Leenders et al., 2015).

As Spotify themselves state, the number of artists consumers listen to every week increased significantly in the last years. This, too, led to an increase in listening diversity, even enforced by programmed playlists and tools such as *Discover Weekly*, *Fresh Finds* or *New Music Friday*. These enable customers to find and listen to artists, whom they would not have discovered before. Spotify presents this as a chance for artists to reach a wider audience (Erlandsson & Perez, 2017), whereas one could argue that it also enhances the competition on these platforms significantly. Therefore, artists need to rely on specific marketing methods to make themselves competitive. Thus, social media marketing increased in importance over the last years. Platforms such as Facebook or Twitter are used to form a community with listeners, to increase their affinity, the interaction and their participation with user-generated-content. This can happen, for instance, through the distribution of written and audiovisual content as well as branded entertainment concepts, such as games, via fan pages and groups for artists (Salo, Lankinen, & Mäntymäki, 2013).

Further, content communities, such as Youtube, Spotify, forums, blogs, and widgets, are used for artist marketing. On Youtube, for example, audiovisual content, such as music videos or concert impressions, can be uploaded and then shared on artist websites, blogs or Facebook pages. Streaming services like Spotify provide the option to market albums and concerts, e.g., through banners, whereas it can be questioned that subscription service listeners spend money to purchase music (Salo et al., 2013). Artists or labels further include playlist promotion via streaming services into their marketing strategy. Even though this practice is often criticized for the amount of money it requires to get featured in such a playlist, certain services also offer promotional support for artists for free (Peoples, 2015). Customers also use blogs or forums to get into and follow the conversation about current topics in the industry. Additionally, widgets, which can be music or video players offered for branded entertainment partners, can be used for artist marketing. Another form of brand

community in the music industry can be mobile applications, which enable interaction between artists and fans or street teams, who organize activities or meet and greet events (Salo et al., 2013).

Another possibility for them to monetize their content is the revenue generation through alternative platforms. Examples of these are *PledgeMusic*, *Artist Share*, *Indiegogo*, *Patreon*, *Kickstarter*, *Feed the Muse*, *ArtistConnect* or *Bandcamp*, which connect artists with consumers. These can then support the revenue generation of artists they fancy through crowdfunding (Miller, 2017).

Furthermore, marketing platforms such as Topspin and direct-to-fan sales are practical possibilities for these artists to generate revenue and market their music. These enable them to bypass the traditional middlemen but, because of lower market barriers, increase the competition more than ever before (Meier, 2014).

To market their music and build a particular fanbase, artists even provide their work entirely for free on platforms like Soundcloud, which do not compensate the content at all. Artists in this cases function as prosumers, in other words, they are involved in the production process of music, which they in return consume as users on this platform, without monetary compensation (Bruns, 2016).

2.3.2.2 Creative Labor

As the genre has high importance and influence on cultural work, it is crucial to analyze and question the conventional notion of genre in the age of music streaming. Services like Spotify or Pandora Internet Radio, the leading audio streaming service in the U.S., and their analytical tools analyze listeners on a significantly more profound level than just genre preferences. *The Echo Nest* by Spotify uses more than a trillion data-points and focusses on every element in a song, for example on the pitch, the tempo or the dance-ability but also on single notes and their connection. Moreover, it analyzes with what sentiment and what keywords people report about a song or an artist online and on that basis offers recommendations. Pandora's *Music Genome Project* even organizes music by traits or *genes*, which for example include the gender of the vocalist, the tempo of the chorus or the type of background vocals. Also, the user behavior while listening to a song is tracked immensely, e.g., when they lower the volume or skip the song (Prey, 2016).

These practices lead to doubts about whether thinking in genres and the wish to be labeled in a certain way is nowadays even present in artists' minds during the creative process.

Furthermore, the question arises how the availability of vast amounts of user data influence the creativeness of musicians themselves, in other words, if they rely on user data for the creative creation of content. A look into the film- and television-business already shows how, e.g., vendor Netflix makes creative decisions based on customer data for their original content (Tsuchiya, 2015).

The time artists spend into the creative creation of music, such as songwriting or rehearsing, often stays unrecognized as work. Keeping in mind the small share of revenue made through streaming, this also points to a clear un- or under-compensation of creative labor for artists (Meier, 2014). Nevertheless, the existence of a change in creative labor, e.g., through the access to big data on consumer behavior or the taking to more market-oriented thinking, has to date not been extensively researched. Therefore, this thesis is additionally going to cover these topics.

As Drahokoupil and Fabo (2016) state that platformization might change work in the future, but the impact until now was very limited, a discrepancy between the opinions of scholars in this field becomes visible. The question arises how artists themselves perceive the impact of streaming services on the way they get compensated and how they cope with their variety of new tasks.

2.3.3 Perceptions and Emotional Responses to Cultural and Creative Labor

Critical voices link developments such as the offering of music on SoundCloud to the criticism on prosumption based on Marxist' thought, which would describe these processes as harnessing users into precarity. The reason for that is that those platforms leverage their business on the work of users, which in this case are also musicians. Those, at least partly, consume music on these platforms while simultaneously helping those services by providing the assets needed for their platform (Bruns, 2016). These assets, in this case, can be the music itself, but also the creation of own playlists or the liking and sharing of other artists. Services like SoundCloud, therefore, can utilize user labor for commercial reasons, while users receive not the slightest share. One could also link subscription services to this approach, whose payment to the producer tends towards zero. Summarizing, in prosumer capitalism control and exploitation are enforced by a trend towards unpaid labor and offering products at no cost (Ritzer & Jurgenson, 2010). The instability and precariousness of employment of cultural workers and (new) media workers get elevated so that we see a movement to even

more to insecure, contingent and flexible work. This includes illegalized, casualized and temporary employment as well as home-working, piecework and freelancing (Gill & Pratt, 2008). Regarding employment, attributes such as "intermittent", "irregular" and "informal" become increasingly familiar (de Peuter, 2011).

However, in sharp contrast stands that artists have always treated freedom in compensation for security. For some, this is even the main reason for enjoyment. Regarding this, a literature analysis by Gill and Pratt (2008) points out that within autonomous Marxist ideas the differentiation of cultural work to other forms of work is often ignored. For example, they state that the most consistent finding of research on work within the creative industries is that it is experienced as satisfying and intensely pleasurable by everyone who is involved with it. Therefore, they request a more in-depth examination of both pleasure and pain of cultural workers. Next, to that, they criticize the absence of a closer analysis of labor organization in cultural workplaces in autonomist' research (Gill & Pratt, 2008).

Hesmondhalgh and Baker (2010) researched the emotional responses to creative labor in three cultural industries, including the music industry, and ended with the same conclusion as Gill & Pratt (2008): Workers experience a high ambivalence in their perceptions. The lines between pleasure and obligations tend to blur in this field. On the one side self-exploitation seems to be a definite issue, especially for young people who are willing to work for free in exchange for a chance. Further, cultural workers tend to work over-hours which do not get compensated. On the other hand, these over-hours are often made voluntarily due to the pleasure, enjoyment, love, and fulfillment these workers perceive in their labor. Another explanation for their willingness to work more than others can be a possible affection to risk, the not-thinking-through of the consequences, or other nonmonetary, psychological rewards. These can be for example autonomy, community, the possibility of self-actualization and a chance of becoming a celebrity. Nevertheless, even though autonomy is often perceived as an enjoyable characteristic, it is accompanied by certain insecurity and uncertainty of the job, with many workers bemoaning nervousness, anxiety or even panic. Due to this precarity, artists or other cultural workers often build a stable foundation for themselves by taking over a second job (Hesmondhalgh & Baker, 2010).

Further, the authors state that socializing and networking is a crucial method for cultural workers to achieve new gigs or contracts. Therefore, they feel a strong obligation to take part in socializing events, which, again, leads to an overflow of work life into leisure time.

Further, if they do not take part in networking, cultural workers often suffer from isolation as they tend to work alone and not in a natural work surrounding, such as an office. Nevertheless, some workers also mention very real and supporting relations they found through this network (Hesmondhalgh & Baker, 2010).

This section summarized what is known about the labor of musicians nowadays: Through subscription services, the revenue which artists can make through their music got reduced significantly, while the competitions they face increased. Therefore, they need to make themselves competitive by participating in more non-creative tasks, such as branding and PR. However, the impact that subscription services have on these processes, as well as on creative processes, e.g., through their provision of user data is to date unknown. Further, alternative platforms might exist, but we do not yet know if artists indeed perceive them as an alternative way of generating revenue. The present thesis is going to fill these gaps. It is also going to contribute to the above-introduced studies with an up-to-date and in-depth analysis of perceptions and emotions musicians have regarding their work as well as their work environment.

2.4   The German Music Industry

In this last theoretical section, the German music industry and its history are shortly introduced, followed by a positioning of the intermediaries in the market. The section will, therefore, provide a knowledge base to better understand market peculiarities of the German music industry, such as the collecting society system.

2.4.1 Introducing the German Music Industry

In 2016, the German music industry generated a revenue of 1.53 billion Euro and recorded its fourth growth in a row with 3% in 2016. The most significant revenue generator still is the CD (53,8%), for the first time followed by streaming with 24,1%. The high amount of CD sales clearly distinguishes Germany, which is known to be a late adopter of digital trends, from other markets. Nevertheless, with 385 million Euro the revenue from subscription services increased by 72,2% to the previous year and is expected to grow steadily throughout the next years. Nowadays, the most prominent and most relevant audio streaming services in the German market are Spotify, Apple Music, Deezer, and Napster ("Umsatz [Revenue]," n.d.).

In Germany, § 11 of the act on copyright and related rights of 1965 represents the totality of legal relations between an originator and their work. Derived from that are the rights of use (§ 31 ff.), consent rights for editing and transformation (§ 23) as well as personal copyright warrants. Of all of these rights, only the mere pecuniary rights can be transferred to third parties ("Musik als Wirtschaftsgut [Music as a commodity]," n.d.).

Artists, as well as publishers, transfer the rights of use to recording companies, so that those are allowed to produce and distribute recordings. Further, they can hold rights on phonograms which were exclusively produced for them ("Grundlagen [Basics]," n.d.). The relation between recording companies and artists cannot be described as a normal employment relationship as there is no formal hierarchy and the income is earned success-based ("Musik als Wirtschaftsgut [Music as a commodity]," n.d.). Nevertheless, organizations such as the KSK (social register for artists) ensure certain security for artists that resembles the one enjoyed by employees. The insurance is partly financed by contributions of artists, partly by grants of the state and partly by companies that utilize art and journalism ("Die Künstlersozialkasse [The artist social fund]," 2018).

2.4.2 Intermediaries in the German Music Industry

Between artists and their consumers, four different sectors of intermediaries can be identified.

First, the *recorded music* sector consists of labels, also known as recording companies or phonogram producers (Bundesverband Musikindustrie e.V., 2015; "Grundlagen [Basics]," n.d.) but also music producers, recording studios, phonogram vendors, pressing facilities as well as the stationary and online commerce for phonograms and music files.

Second, *music publishers*, which need to be distinguished from recording companies, hold rights in text and composition but not in sound recordings ("Grundlagen [Basics]," n.d.). This sector includes all publishers who publish sheet music but also those that look after the copyrights on behalf of composers and lyricists (Bundesverband Musikindustrie e.V., 2015).

Third, the *live music* sector counts concert organizers, guest performance directorates, artist agencies, tour and ticket service providers, and operators of music clubs, private music theaters and bigger event halls (Bundesverband Musikindustrie e.V., 2015).

Fourth, the *collecting society* sector includes the not-for-profit collecting societies GEMA (society for musical performance- and mechanical reproduction rights) and the GVL (society

for the use of ancillary copyrights). Both societies exercise copyright and performance protection rights concerning the creation of music but also to the organization of concerts and the production of phonograms and music files (Bundesverband Musikindustrie e.V., 2015). The GEMA is a state-authorized collection company and performance rights organization responsible for the originators of a song. Another actor is the GVL (Society for the usage of ancillary copyrights), which deals with the interests of exerting actors, phonogram producers, and event organizers. For every new release labels or musicians need to register the song in the GEMA and GVL systems. Unfortunately, these registrations are known to be very administrative, disproportionately complicated and time-consuming. Further, they have an impact on how contracts for a release are conducted between labels and artists, which can lead to certain tensions (Schumacher, Klingner, & Gey, 2015). However, the German collecting society system proved its power in bridging the *value gap* of YouTube: The gap points to the difference of what YouTube earns with online advertising around a musician's music video and the amount of money they pass on to the artist. The global recording industry body stated that with 800 million music users globally YouTube only transfers a bit more than 1$ per user to the music industry for an entire year (Sweney, 2017). The German GEMA, however, finally managed to end the fight with YouTube about royalties after seven years. Since 2016, the 70000 artists registered under the collecting society receive a fair remuneration, which also includes the past royalties which were accrued over the seven-year-long fight (Eddy, 2016).

Further, as Schumacher et al. (2015) researched the label-perspective on the current German music market, they found that with the digitalization new actors emerged in the German market: Labels now need digital aggregators to distribute their music and publishers, e.g., collaborate more and more with other publishers. Hence, the number of actors became more complicated, and the number of interfaces increased significantly. All these competing actors claim their part of the revenue which affects the amount of revenue left for the artists at one end of the exploitation chain. Moreover, the interviewees pointed to a societal problem: They state, that German politicians motivate young people to pursue creative, culture- and media-related occupations but cannot ensure that those can afford to live with their income. The interviewees claim that the German society does not value the developers of content but the distributors (Schumacher et al., 2015).

The thesis is going to show how this market structure applies from the artist perspective and how musicians perceive the importance of these intermediaries. It can, therefore, show if the role of certain intermediaries truly changed after the rise of streaming platforms.
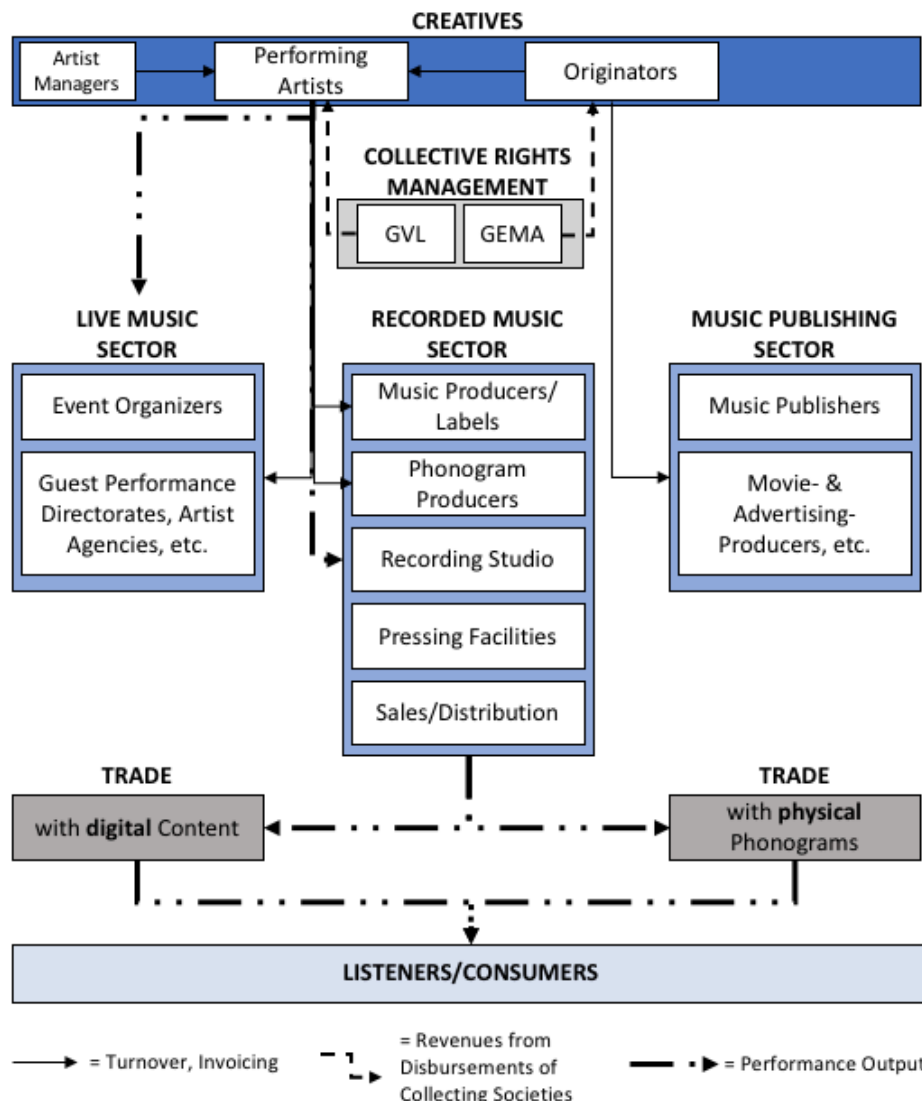

Figure 2: Structure of the German Music Market from the Artist Perspective (conflated and translated) (Bundesverband Musikindustrie e.V., 2015, p. 22, 30, 40 & 48)

Schumacher, Klingner, and Gey (2015) found that labels as well as publishers in the German industry, similar to those in other industries, are nowadays confronted with a rising number of business models and sources of income. The distribution of music via various streaming services resulted in a fragmented sales process so that the number of work tasks increased significantly for producing actors, such as labels or artists. Especially social media had a significant impact on how music gets promoted in Germany. As the most relevant promotion channels in Germany, the authors list Facebook, Twitter, and Youtube as well as the music platforms Soundcloud and Last.fm. Through in-depth interviews with employees and owners of medium-sized labels or publishers, they found that most of them only focus on

the named platforms, because it would be impossible for them to focus on all the various possibilities there are. Summarizing, even though relying on the label-perspective, the authors found that artists are nowadays much more involved into the economic aspect of music production, which empowers them but also tends to be to the expense of creativity (Schumacher et al., 2015). This thesis, therefore, focuses on how artists handle these tasks and how they perceive especially the new intermediaries in the market with respect to the background of the German music industry. This last theoretical chapter showed that the peculiarities of the German music market do not differ significantly from, for example, the U.S. music market, but pointed out the specific strengths of the system: The functioning copyright system, the assertiveness of the German collecting societies as well as the existence of state-funded support possibilities.

2.5   Summary

Recapitulating it can be said that the development in the Sharing Economy draws attention to the growing precarity of work in the digital age and shows the importance of examining how musicians perceive their work within the subscription-based music industry. The music industry went through its probably most significant transformation so far around the turn of the century which resulted in a high coverage of literature, also regarding independent music production and new forms of labor. Therefore, research conducted by, amongst others, Hracs (2012), Negus (1998) and Bockstedt et al. (2006) but also by Gill and Pratt (2008) and Hesmondhalgh and Baker (2010) function as landmark studies that provide a firm basis for this research, which is focused on the second substantial shift in the music industry. Whereas for example Schumacher, Klingner, and Gey (2015) already offer insights in the contemporary German music market this thesis is going to add with an in-depth examination of the artists' perceptions towards the intermediaries and in general changes in labor.

3 Method

This thesis is going to examine labor of German musicians after the rise of streaming platforms, namely their tasks, the intermediaries between them and the customers and their perceptions towards work and compensation. To be able to identify the new forms of labor, a literature analysis already provided insights into labor after the digitization of music. Qualitative interviews were conducted to enable an examination of current forms and perceptions of labor.

In this section the research design of the qualitative interviews is going to be discussed in more detail, then the sampling process is going to be presented, followed by the operationalization, data collection, and the analysis method. After that, validity and reliability of this research are going to be addressed.

3.1 Research Design

The creation of the theoretical framework as well as the interview guide followed a deductive approach, in other words, it was based on existing theory. Contrary to that, the outcome analysis conducted in the scope of this master thesis follows induction as the mode of inquiry. This means that the gathered data is explored and analyzed to conclude with new theoretical findings (Babbie, 2017).

Further, this research follows a qualitative approach as the research questions ask for a personal view of the current state of the art of labor and the individual perceptions of workers. This can only be answered by reconstructing people's views, which is possible through an in-depth qualitative investigation rather than an examination of covariance, as it is the case for a quantitative approach (Guba & Lincoln, 1994). This research project does not aim at being representative but to rethink existing patterns and to analyze them deeper. This exploitive study is going to create a normative understanding of the German music market from the artist perspective. An analytical approach is ensured through a variety of genres and artists' statuses as established or emerging and independent or signed.

Therefore, this study was conducted through in-depth semi-structured interviews with German musicians. In-depth interviews are one of the primary methods for data collection used in qualitative research to grasp the point of view of respondents and therefore to construct knowledge about the social world through human interaction (Legard, Keegan, &

Ward, 2003). As knowledge is created in the investigation process within qualitative methods (Guba & Lincoln, 1994), so for this case within the interaction of researcher and interviewee, the researcher maintained flexibility to adapt the interview guide around newly emerging topics. Therefore, the semi-structured design was chosen as it enables the interviewer to collect information on some issues that were derived from theory, but also creates an opportunity to derive new findings.

3.2   Sampling

The population of this research includes musicians in Germany that offer their products on at least one music subscription service, such as Spotify, Apple Music, Amazon Music or Deezer. Because of the similarity of these streaming platforms, especially their revenue models, the focus of this research does not lie on one specific platform. This approach further enhanced the generalizability of the research.

The sample drawn from this population is a non-random purposive sample, which means that the sample is not representative but applies to the research question and therefore the attainment of this study. Nevertheless, the sampling process aimed for a variety of artists to ensure heterogeneity and richness of the data. This further helps to include specific variations in treatment, which can be caused by the current status of an artist, as codes in the analysis. For example, attention was paid to include artists which communicated a label on their sites and those that did not. Additionally, artists at the beginning of their career (emerging), those that are in a transition phase (mid-career) and those who are settled in the market (established) were included. The respondents are, moreover, active in various genres.

This approach of including artists which differ in many aspects was first chosen to enable the inclusion of comparative elements between different kinds of artists in the analysis. Ultimately, due to the small sampling size, no active comparison was drawn between artists from varying genres or statuses. This is also due to the fact that the treatment of streaming services like Spotify as well as their compulsory requirement of a digital aggregator does not differ between artists of different backgrounds. Further, the variety in dependency or independency did not enable a comparison between independent and signed artists: It was not possible to clearly allocate all artists to a status, as some of them, especially within electronic genres, are non-exclusively signed under various labels and some even own their own label. This finding, however, will be discussed in more detail in the analysis section.

Finally, 13 interviews were conducted whereby the interviewees were found through snowball sampling. This strategy of sampling had multiple starting points: Through the researcher's Facebook network and those of friends from various cities in Germany posts were spread to address German musicians. Through another friend, contact was made to a booker from *Jazzhaus Freiburg* who additionally provided the researcher with initial contacts*. Further, the researcher knew one musician personally*. Starting with these contacts as many interviewees as possible were sought, followed by an enlargement of the sampling through the snowball procedure. In the end, the sample consisted of artists from many varying genres, including Techno and Dubstep, Jazz, Hip-Hop, Indie- and Soul-Pop, Singer-Songwriter music, and even Rock. Further, it included almost even parts of emerging, mid-career and established artists and, additionally, solo-artists as well as band members. What needs to be noted, is that all interviewees were still relatively small in reach, with ClockClock being the most successful band with around 8500 monthly listeners on Spotify. Further, women were underrepresented in the sample with only 3 female respondents. The exact composition of the sample, including the dates the interviews were conducted, is presented in Appendix A.

3.3 Operationalization

The interview guide, which functioned as a base for all interviews, was derived from the theoretical framework. Based on the chapters about the Sharing Economy, the German music market and the transformation of labor the guide covers the major fields of *Creative Labor, Non-Creative Labor, Intermediaries* and *Perceptions*. Based on the theoretical framework the definition of the topics, accompanied by initial example questions, will be presented in the following. The extensive interview guide can be found in Appendix B, including a derivation of each question based on the before presented theoretical framework.

The first topic of creative labor investigated how the creative production of music as well as other creative tasks, such as rehearsing, video production or graphic design changed. As an example, questions investigating this topic were:

- *Do you use the data you get about your consumers through subscription services? If so, does this knowledge influence your creative process?*
- *How many hours would you estimate do you spend a day with creative tasks?*

The second topic of non-creative labor encompasses all tasks musicians need to face and that do not include the creative production of their products. This means the researcher

investigated managerial aspects, such as media relations, booking and licensing and technical tasks, such as recording, editing or equipment management. Further business-related tasks like merchandising, financing and branding were explored. Example questions were the following:

- *Which platforms, digital or not, do you use to market your music?*
- *How do you make sure to get noticed by consumers on these subscription services?*
- *How many hours would you estimate do you spend a day with these rather non-creative tasks?*

Within the third topic, which addresses intermediaries, the researcher asked about the network between the artist and the consumer. It shall demonstrate if the role of middlemen indeed declined and if not, how the network around musicians changed. To investigate these questions such as the following ones were asked:

- *Can you please explain which organizations you see between yourself and listeners?*
- *Do you work together with these organizations by choice? Or do you feel like this is the game you need to play?*

The fourth topic, the perceptions of musicians, aimed at somewhat sensitive themes such as the satisfaction and pleasure but also the insecurity artists perceive in their work. Questions for this topic also covered the opinion of artists regarding their compensation, in other words, if they feel compensated justly or the opposite. Therefore, example questions were the following:

- *Do you think your music is valued enough?*
- *Do you feel satisfied with your work? What makes you happy and what unhappy?*

3.4   Data Collection

The researcher herself conducted the interviews in German to avoid possible language barriers and to ensure the comfortability of the interviewees. The relevant sections of the interviews, which were cited in the analysis chapter were translated to English. The interviews were conducted via Skype as the interviewer is currently located in the Netherlands whereas the respondents needed to be German. The average length of the thirteen performed interviews was 48 minutes. After every interview, the transcription was executed, and if new findings were made that seemed to be highly relevant for upcoming interviews,

the interview guide was adjusted. This ensured that the findings were not restricted by before identified frameworks and that no relevant topics stayed unexplored. As an example, Konstantin Koller mentioned that he does not perceive a difference between uploading his music to Spotify or SoundCloud for free. In his opinion, artists cannot generate revenue out of their music anymore but can use these platforms to increase their reach and after that search for a way to monetize it, e.g., through gigs or merchandise. As this point of view seemed to be very controversial, the researcher decided to ask the following interviewees for their opinion on this topic.

The procedure and techniques of the interview were based on the approach of Legard et al. (Legard et al., 2003). They identified six stages of an interview. First, right after the calling, the researcher took the responsibility to put the interviewee at their ease by radiating peace and confidence. Until the interview started the research topic was excluded from the conversation. The second step was the introduction of the topic, including the nature and purpose of the research. Furthermore, the interviewer ensured confidentiality and asked for the permission to record the interview. Special attention was paid to providing a private and quiet surrounding, at least on the side of the interviewer. The third stage, so the beginning of the interview, included important contextual information, such as personal details, to facilitate the formulation of personal questions later on. This approach helped the interviewee to open up as they were confronted with questions they are used to. Follow-up questions at that point helped to accustom the interviewee to later questions that they were expected to give detailed and spontaneous answers and to that the researcher will respond and probe. In stage four, the researcher guided the interviewee through the themes, those who were derived from the theoretical framework but also those that emerged during the interview. During this procedure, follow-up questions, as well as probes, were asked to ensure an in-depth examination. Five minutes before the end of the interview the interviewer implied the final topic or question. This helped the interviewee to slowly get back to their level of everyday social interaction. Further, it helped to ensure that no feelings or issues of the interviewee stayed unmentioned. In stage six, so after the interview when the taping recorder was switched off, the interviewer thanked the interviewee and assured that their answers were helpful for the research. Additionally, confidentiality was assured again as well. The moving away from the interview situation sometimes sparked new ideas in respondents, which were

then either written down or with the interviewee's permission replied and recorded. The researcher stayed flexible enough to talk a little while longer with the interviewees if the interviewee seemed to be in the mood (Legard et al., 2003).

The researcher further adhered to the five key features of in-depth interviews as proposed by Legard et al. (2003) as well. She combined structure with flexibility, as she adapted the before designed interview guide to newly emerged topics. Interviewees were motivated to speak freely, and the interviewer aligned her answers to those stated by the respondents. Probes and follow-up questions ensured in-depth to enable the researcher to grasp the factors that underlie an initial response, such as feelings, reasons, opinions, and beliefs. The interviewer supported the creation of new knowledge by leading the interviewee to thoughts, ideas or possible solutions to problems they have not explored before. The interview was taped to ensure a mapping of the natural language used by the respondent and avoid a distortion caused by the interviewer taking notes (Legard et al., 2003).

3.5   Data Analysis

The transcription of the interviews, as well as analysis of the findings, were also conducted by the researcher. As a method for data analysis, a qualitative content analysis was chosen to create categories out of the transcript which then enables a structured interpretation. A suitable way to identify, analyze and report themes is the thematic analysis as proposed by Braun and Clarke (2006). Due to its theoretical freedom, this type of analysis enabled a flexible approach to provide rich, detailed and complex data in the end. The thematic analysis inductively derived themes based on the data. It is further analyzed the latent level of the data, which means that instead of looking only at the surface the researcher examined underlying ideas, assumptions, conceptualizations or even ideologies of the respondent as well. The reason for that is that sensitive concepts such as precarity or exploitation cannot directly be derived from the data and can be profoundly influenced by personal attitudes and experiences of the interviewee. As it is usual for a latent approach, the analysis was conducted within a constructionist paradigm. This enabled the theorizing of socio-cultural contexts and structural conditions instead of individual psychologies (Braun & Clarke, 2006). For the analysis process, the qualitative research software Atlas.ti was used.

The data was transcribed orthographically, which means that a verbatim transcription of all verbal and non-verbal (e.g., coughs) expressions was produced. During and after the transcription, the first step of the thematic analysis was that the researcher got familiar with the

data by re-reading the datasets several times, while simultaneously taking notes of emerging ideas. Following, initial codes, which appeared to be relevant for the researcher regarding the phenomenon, were produced from the data. These codes organized the data into meaningful groups. In the next step, themes were identified using the previously created codes, followed by an allocation of all codes to the themes. During this phase, the researcher initially identified the relations between codes and themes, to, e.g., determine main- as well as sub-themes. After this, the themes were revised. First, by ensuring coherence on code level and second, by contemplating the validity of themes. To allow this, the whole data set was re-read. Within the fifth step, the themes were defined, by identifying their relevant core while respecting the relations to the themes around them. Moreover, they were named and yet again revised. A table of the derived themes, including exemplary codes, is presented in Appendix C.

The final step was the analysis followed by the writing of the outcome-report. For this section, the themes were subordinated to the main topics of the subquestions, as presented in the introduction: creative labor, non-creative labor, intermediaries and perceptions. The analysis tells a highly analytical, yet argumentative narrative derived from the data, which is answers the at the beginning presented research question (Braun & Clarke, 2006).

3.6   Validity and Reliability

According to Leung (Leung, 2015) validity consists of the applicability of the research question for the desired outcome, the choice of methodology with regards to the research question, the appropriateness of the research design, the sampling and the data analysis and further the validity of results and conclusion. For this study, the research question was built after the careful assessment of prior literature and the identification of studies that already paved the way within the field, such as the model of creative and noncreative tasks of independent music production of Hracs (Hracs, 2012). This study aims to grasp individual points of views and processes, which is why according to Legard et al. (Legard et al., 2003) the chosen methodology of in-depth research is appropriate. The purposive way of sampling ensured the inclusion of appropriate respondents on expert level. The qualitative content analysis used for data analysis helped to recognize patterns within the answers and to build up a meaningful picture from the data collected in the interviews. It further avoided a compromising of the dataset in richness and dimensionality (Leung, 2015). A carefully executed

and detailed discussion of the results and conclusion, as well as the provision of detailed transcripts, also strengthened the validity of the study.

The reliability of this study is ensured by the respectful treatment of the criteria proposed by Leung (Leung, 2015) as well. Therefore, the data itself was introduced as detailed and transparent as possible with the inclusion of quantitative aspects whenever feasible. Additionally, the research design was made transparent within the relevant chapters as well as through the provision of the interview guide and verbatim transcriptions of all interviews. Further, the theoretical framework created a steady basis, which enables other researchers to understand the assumptions behind the research.

4 Findings and Analysis

This thesis aims at analyzing the perception of musicians in Germany on how their labor changed due to the rise of subscription services. Therefore, the findings are going to be presented accordingly to the above-introduced subquestions. Hence, in the following, the contemporary creative and non-creative labor of artists, the state-of-the-art intermediary network, and their perceptions are going to be presented. However, preceding that, another surprising finding shall be highlighted comprehensively to the subsequently following ones.

4.1 Rethinking Music

> I would say, it just changed everything. (K. Koller, personal communication, April 5, 2018)

As stated in the theoretical framework, subscription services tremendously changed the way people listen to music, as they provided consumers with the ability to listen to vast amounts of music for less than 10€ per month. However, they also changed the way musicians themselves perceive their art and the concept of music. Music, prior perceived as and utilized as a product, is now perceived as a marketing tool.

> In principle, music becomes less and less a product, I think, but rather a marketing tool to make the brand of your band known and to subsequently find other sales channels. (J. Schaffhauser, personal communication, April 8, 2018)

This also changes the role of artists, as the whole music industry is now focused on promoting the artist-brand, instead of the records, so that musicians are compelled to sell themselves (Meier, 2014). That also influences how they approach non-creative tasks, which is going to be addressed in more detail later on.

The finding is a reminder of the first significant shift in the perception towards music, following the invention of the phonograph in 1877 by Thomas Edison. Before that, the only possibility to listen to a song was live, but the phonograph enabled people to listen to music first through music boxes in bars and later at home on their own. This new or rather first way of distributing music also led to a reduction in the length of songs as the first phonographs could only hold music with the length of two to three minutes. This development interfered with the traditional creative process of artists back then, as live performances left more room to stretch the length of music flexibly, and still influences the length of pop songs

nowadays. Further, the new system rewarded another type of artist: The need for charisma and virtuosity on stage decreased, whereas the ability to deliver takes in a perfectionist manner increased in importance. As music was suddenly available whenever the listener wanted to listen to it, they were enabled to pick out the smallest of nuances and to become intimate with a particular song. Through that, the relationship between an artist and its listener became closer and more immediate than ever before. However, it also provided the first problematic financial arrangements. The revenue made by labels were kept non-transparent, leaving the artists ripped-off (Thompson, 2016). This already points to a first decrease in the financial appreciation that was bestowed upon the originators of a song.

Given this shift from a commodity to a product in the 19th and 20th century, it can be seen that the notion of music recently went through a change again, facilitated through the rise of subscription services. As one respondent claimed:

> I understand, when older bands are upset about this as money gets lost through that [through subscription services], but for us, this never was a source of money, and because of that, as I said, it is more marketing to us. (F. Hirn, personal communication, April 28, 2018)

One musician even revealed that he offers his music in exchange for likes on social media platforms, "according to the motto: like for download" (R. Lott, personal communication, April 5, 2018).

The base of this change in the notion lies within the often-criticized revenue model of subscription services, which prohibits artists to generate revenue out of their music. As a respondent claimed:

> In principle, music is free due to streaming. I do not think that it makes much sense to offer a so-called free download. I think those times are over. (J. Schaffhauser, personal communication, April 8, 2018)

The non-differentiation of uploading music for free, either for example on SoundCloud or Youtube, and offering it on subscription services emphasizes the change in the mindset. Musicians do not even try to get money through the usage of these subscription services. As subscription services also led to a decrease in traditional sales, musicians say goodbye to the option of getting paid for their songs. One interviewee even perceives these expectations as something musicians should drop as soon as possible.

> I think that you cannot really make money [with music]. That is a thought one needs to say goodbye to and after that one can begin having reasonable ideas. (K. Koller, personal communication, April 5, 2018)

Following his approach, artists first need to place their music at the disposal and only after a positive reaction of the public they can figure out a way of revenue generation. As he declared:

> I think that in the future it will be more like this that when you do something, you first set it free and then you see how to make money out of it […]. If you […] try to generate money out of every click that you get somewhere, you will not reach that many people and ultimately not obtain that much with your music. (K. Koller, personal communication, April 5, 2018)

This approach, however, is connected to the offering of labor for free, in other words, artists first need to deliver preliminary work, without any prospect of revenue. The dimensions of the labor they provide before they receive any payment are, however, neither tangible nor predictable in the beginning. Konstantin Koller even pointed out that the attempt to generate money out of music can influence your artistic outcome and therefore your reach and impact.

Nevertheless, other artists contradicted these claims and pointed to a need to differentiate between genres. Electronic music is commonly distributed and listened to on free services like SoundCloud. Other genres, which primarily aim towards an older target group, however, still have other, more traditional possibilities of generating revenue.

> For us, this is, of course, a bit different. Because at concerts – well, we make more acoustic music and then it is different, we really sell CDs. So, because of that we rather have an audience. […] Our music is more – I think, one would also listen to it during the daytime. Or maybe in the car. So, I think one needs to differentiate by genre too. (H. Sikasa, personal communication, April 27, 2018)

The question nevertheless is, how long a differentiation between genres is still tangible. As the population gets older, digital natives gradually replace older generations, which are nowadays those that prefer the more traditional ways of listening. Further, subscription services possibly already fine-tune strategies which leverage their growth potential in underrepresented consumer segments. Therefore, in a few years, a differentiation between genres in how revenue is generated through music might be obsolete.

The finding which was presented in this chapter directly adds to the before introduced statement made by Cheng (2016) that the Sharing Economy facilitates not only disruptive innovation but also the disruption of established business models.

If music is perceived as a marketing tool instead of a product, Spotify and Co. are not sales but marketing platforms and need to be treated as such. The next two subsections are going to dive deeper into the question, if and how labor changed for artists, respecting both creative as well as non-creative processes.

4.2   Creative Labor

Surprisingly, the rise of subscription services did not influence musicians in their creative processes as much as expected. Most of the respondents did not recognize any change in their creative behavior, at least none that can be led back to an adaption through user insights. However, some vital influences were noticed and are going to be presented in the following chapters.

4.2.1 The Streaming Craftsmen

One crucial point in which those subscriptions, nevertheless, interfere with previous creative processes is the length of the songs. Further, subscription services led to a shortening of the time that artists have to persuade their listeners, due to the ease of skipping to the next song.

> People can decide way faster if they like something or not. In the past, when you bought an album in a record store and then you did not like it that much in the beginning, you listened to it maybe three or four times and at some point, you liked it [...]. And today, as on Tinder, you just get swiped to the right, done. (R. Lott, personal communication, April 5, 2018)

This reference of Raphael Lott especially points to the similarity with that Spotify and Tinder users navigate through their music or rather dating options. As for Tinder, the clicking and swiping patterns of subscription services leave users with a binary decision between yes and no (David & Cambre, 2016). Through these patterns, platforms influence users' "attitudes and behaviors through speed and repetition" (David & Cambre, 2016, p. 9). Raphael's mention of Tinder seems to point to a decrease of perceived appreciation, as it has become so easy for listeners to move to the next song after just a few seconds. The urge to catch people in the beginning of a song gets noticed and could have a massive influence on creative outputs. As Christoph stated:

> Through that, you see that songs are getting increasingly shorter [...]. And I also notice that personally that I produce songs extra for the radio so that

they are ideally short. And that you, of course, need to try to catch the listener with something within the first five seconds. (C. Stötzer, personal communication, April 9, 2018)

Like companies, which want to stick in their consumers' minds and thrive over a long-term, artists need to adapt to the needs and wants of their listeners. As sticky business models are often built on user data, artists can use the knowledge about their users' behavior to increase the spread of their music (Jenkins, Ford, & Green, 2013). Therefore, a powerful beat in the beginning can function as a hook keeping the listener from swiping to the next song.

Another artist added that the knowledge about which songs are the favorites of listeners influences the live set and helps to adjust the sequence of songs to the preferences of users.

For example, we found out that one song from our first EP, which is an evergreen and also made it into playlists, is played many times more than other songs […]. So, because of that we kind of established, that this is always our last song on stage. So, the numbers we see on Spotify – and we heavily rely on Spotify – also influence our live set. (F. Hirn, personal communication, April 28, 2018)

This finding pushes into the online-offline relationship between artist and customer nowadays. As Lepa, Hoklas, Egerman, and Weinzierl (2015) stated, the experience of live music leads to an "embodiment" of this music and a changing experience when listening to a song later on. Therefore, the intersection between the offline and online relationship towards their listeners needs to become a focus of artists to deliver a holistic experience. Hence, songs that show potential online should be included into the live set in a very prominent position, to satisfy the expectations of fans. Moreover, in turn, the position of a song in an offline set can shape the spread of the song amongst those users, which attended a gig. Subsequently, it could also be suggested that while fans can influence artists, e.g., through the data that is collected about them, the artists also have the limited capability of influencing their fans. Even though no one of the respondents admitted it, the question arises whether the active recognition of successful songs, nevertheless, at least subconsciously leads to an adaption of upcoming output.

However, it seems that creative processes are still more influenced by traditional matters or intermediaries, such as labels, instead of user data provided by subscription services. Some of the respondents, which non-exclusively released their music through different labels, mentioned a surprising indirect influence of labels on their creative output: The wish

and prospect of collaborating with one particular label can lead to creative adjustments of artists, making themselves more suitable for the portfolio of the label.

> Back then, it [the label] was relatively young and completely unknown. And I absolutely wanted to get in. Well, this was my big aim and of course I included many of their songs in my DJ sets […]. And that certainly influenced a lot. Because a label always drives a specific course. You can never say a label remains rigid and produces exactly one musical style. Of course, there are borders but the course always changes a bit. And you need to focus on being relatively in the front. So, you should anticipate what could come next. (R. Lott, personal communication, April 5, 2018)

Nevertheless, other artists, who also acknowledge the need to adapt to the peculiarities of subscription services, do not even think about adapting their creative output. Konstantin's claim points to the dilemma artists find themselves in:

> If you would use data from the internet, from services like Spotify, to change your creative product then you are not an artist anymore but a – I don't know – a craftsman? (K. Koller, personal communication, April 5, 2018)

The findings of this chapter contradict the expected outcome as based on the already known practices in the film- and television business. As stated in the theoretical framework, vendors like Netflix already rely on big data when making creative decisions (Tsuchiya, 2015). This shows that even though musicians allegedly perceive music as a tool rather than a product they still refuse to utilize their music in the most functional way through the usage of user data. This indicates that music can still be differentiated from other products or services, which can be possibly traced back to the creativity and personal emotions that are usually spend into producing a song.

4.2.2 The Precarity of Creativity

The first significant shift in the music industry, as presented in the theoretical framework, already led to a decrease of creative compared to non-creative time spent. The second consequential shift further accelerated the time artists need to spend with non-creative labor, so those tasks that are not directly connected to the creation of their music. One question was asked, which got respondents to estimate their time spent on creative and non-creative processes. The answers differed tremendously: Some respondents estimated that they spend on average eighty percent of their time with creative labor, whereas most of them perceived creative work as far less than non-creative work.

> At this point, way too little, way too little. Right now, I am spending way more time on this organization crap [laughing]. […] Sometimes there are weeks when the creative part is ten percent and everything else ninety […]. The more you need to do on your own, the more you are a one-woman-business, as it is in my case, the more the creative stuff comes off badly. (T. L. Booz, personal communication, April 11, 2018)

Quite a few respondents were surprised by the distribution of their work:

> I would say right now, as we do everything, everything, everything, on our own maybe thirty percent? […] So surprisingly little. (F. Hirn, personal communication, April 28, 2018)

> Wow, crazy, I just noticed myself that it is probably fifty-fifty. (F. Margraf, personal communication, April 10, 2018)

The surprise in these answers indicates, how seldom artists consider their work distribution and how spending only a little time on creative processes has become the norm. Maybe this notion and the fact that young artists are not used to anything else are the reasons why most artists seem to accept the status quo.

Nevertheless, creative processes take time and the main problem is that they cannot get standardized and almost never follow one strict scheme. The time needed for a song can differ significantly and it is not possible to consider the time needed in advance. Creative ideas and phases cannot get scheduled, in other words "there is no secret recipe" (R. Lott, personal communication, April 5, 2018).

> I do not have a real process, where I can say: This is where I start, this is where I end, and I need two hours and then done. It is more of chaos. (K. Linn, personal communication, April 10, 2018)

> What is not fun? Creative crises, of course. I am not a machine, and sometimes nothing may happen for half a year, and this is endlessly frustrating. (J. Schaffhauser, personal communication, April 8, 2018)

Further, creative outcomes are heavily dependent on feelings and mood, which also emphasizes the high emotional dependency on the product.

> Art flourishes in the dirt. I always experience that very clearly. So always when I have an emotional situation – it does not matter which direction, if high, down, or whatever – it somehow results in an album. (F. Margraf, personal communication, April 10, 2018)

Next to the dependency of these factors and the small timeframe that remains for some artists for creative work, it is surprising how often artists mentioned the creation of songs,

which were not even released. In creative processes, experimental phases and searches for inspiration, such as the following one, need to be considered as well.

> We had a musicians meeting in Berlin – named: 'Treffen junge Musik-Szene' – and during that we locked ourselves into a cellar for three days and just tried to jam together to get ideas again. And we noticed it went well. Because of the time you have and just that you jam together, the most different ideas occur. (F. Hirn, personal communication, April 28, 2018)

One respondent mentioned that the success of creative products is unpredictable and that the time and energy spent on a song has nothing to do with the success prospects. Therefore, artists tend to write and record songs, which in the end are maybe not even picked by a label, let alone by Spotify. There is a high discrepancy between the creative output that is visible on subscription services and the original repertoire of art produced. This again, indicates a high amount of unpaid labor and the facilitation of pressure, as it takes up space of the already sparse time left for creative processes.

Nevertheless, the primary issue stays that even after all the obstacles mentioned above, creative labor, such as songwriting or rehearsing, is not perceived as labor (Meier, 2014). As Christoph described it:

> People are not willing to pay fair wages for creative labor because creative labor is taken for granted […] and assumed that it is not much work. Moreover, that you get the best ideas under the shower either way and that it is not even labor because of that. But it is labor just like everything else, like when I would be a plumber or – I do not know – a pilot. It is all the same labor. However, it gets paid less in the creative business, and there are little collective wage agreements. (C. Stötzer, personal communication, April 9, 2018)

This is an issue a lot of creative workers, especially freelancers, suffer from: After years of training their profession is not valued enough to compensate it with an appropriate amount of payment, whereas the client profits. Different movements, such as the #NoFree-Work campaign are urging a chance in this issue and pushing towards legislation against the exploitation of, e.g., freelancers (Chandler, 2017). Of course, this issue is not new as it was always hard for artists to make a living out of their work. However, the rise of subscription services took away one revenue stream of artists – the one they made with their creative output. Additionally, the jobs, which almost every one of the respondents needs as a second foothold, interfere with the creative process as it takes the freedom to implement new ideas

when they arise. Nonetheless, if artists want to get competitive in the music industry crea-
tive thinking becomes more and more vital – but in the search for new revenue channels and
the creation of marketing strategies.

4.2.3 Holding on to the Album

Another influence is the further facilitated elimination of the album as an overarching
creative dimension, which before provided a bigger platform for artists to express them-
selves and to tell a story. As stated before, the recommendation system of, for example,
Spotify only includes individual songs of artists, which leads to a change in listening behavior:
Many people do not listen to whole albums anymore, leaving artists in a tight spot to only
produce single hits. All of the artists who were interviewed for this research project, how-
ever, are still holding on to the concept of the album.

> In the German rap-scene everything became very hit-loaded […] through
> these playlists. Nowadays, there are even artists […], which do not see an
> album as a conceptual album with certain themes that get processed. Well,
> fortunately, this still exists, because I am more the album kind of person. But
> the absolutely relevant artists […], they really try to produce fourteen hit-
> singles […]. The tracks are strong, but they are often superficial because they
> are made for the mass. And I think that is sad. (F. Margraf, personal commu-
> nication, April 10, 2018)

> Actually, everything should be a hit, but I do not want to make music with
> such a mindset and I am trying not to […]. Within an album one has a com-
> plete other freedom. (T. L. Booz, personal communication, April 11, 2018)

The respondents seem to push against the popular with this approach and prioritize
their creative freedom and the quality of their art over the prospect of higher exposure. In
an age, where artistic products mostly are curated by algorithms, the album stays a creative
instrument in the hand of artists, or in other words in the hand of experts. The curation of
art is a highly discussed factor in academic literature, which questions "who provides mean-
ings of taste, style and general aesthetic knowledge that has substantial impact on peer and
social groups, audiences, followers, and consumption" (Lange, 2016, p. 238) nowadays. The
only method of streaming services to differentiate themselves from each other is through
offering a branded music experience, based on personal recommendations. This, however,
leads these services into a communicative capitalism, where the discourse about music be-
comes more important than the music itself. Hence, it can be assumed that the alleged data-
focus of these platforms only covers cultural or economic imperatives they can capitalize on,

leaving users and musicians without control (Morris & Powers, 2015). Nevertheless, art is an experience good, which unfolds its true value only through consumption. In a digital surrounding an album can, therefore, be the suitable platform for musicians to unfold their art and get consumers engaged more deeply (Arora & Vermeylen, 2013a). Maybe this is why the respondents for this thesis actively hold on to the concept of an album and the creative process of curating it. Their loyalty towards the album, as well as the scarce adaption to user behavior in other creative matters, shows that musicians still put their integrity as an artist first.

Most of the artists remain with the concept of an album because of the creative freedom it provides or because of nostalgic reasons. Others, however, even perceive an album as a crucial tool for bookings and partner searches:

> We decided now that we still want to remain with an album. We know that it makes sense to release a single every few months, but with regards to […] the search for external partners and bookings […] it also makes sense to release an album at some point […]. It is just like a business card, especially when you apply externally. If you really have an album, which is physically available, then that is certainly a statement. (F. Hirn, personal communication, April 28, 2018)

Further, an album can be instrumentalized as a basis for live performances:

> I think albums are always good if you offer a live performance. So, if you take people on a journey and they know: ok, first an intro, then follows the act, then I get an outro again. So, then you provided a good frame. (C. Stötzer, personal communication, April 9, 2018)

Because of all the above-named reasons, most of the respondents try to defy the involuntary transfer of power in the curation from the artist to the algorithm. As a countermeasure, many decided to create EP's as the happy medium. However, the wish for a bigger medium and the leading back to traditional listening habits persist:

> I am thinking, when I release an EP at some point again, to also include an intro and outro, to counteract the whole playlist thing a bit. To encourage the listeners to listen to an album as a single entity in a row. (C. Stötzer, personal communication, April 9, 2018)

An argument that clearly stands against this outcry is that possibly, the album as superior creative instrument and the cherry-picking of songs do not need to contradict each other: Radios have always only picked individual songs and, therefore, already took the

power of music curation away from the artists. Nevertheless, until now, the album has further persisted, which can lead to the assumption that subscription services might not be able to override the album after all.

4.2.4 The Insignificance of Genre on Creative Labor

The genre seems to play no conscious role in the creative process of the respondents. Most of them had problems defining their genre and therefore questioned the influence that genre might have on their creative process.

> We have problems defining our own genre [...]. Nowadays, you can maybe differentiate if someone is singing or rapping or if there is no singing at all. Otherwise, everything remarkably joins together. (K. Koller, personal communication, April 5, 2018)

Others even perceive the concept of genre and the strict consideration of genre as something blocking their creative freedom.

> I think this is the point where we would say, we limit ourselves through that. If we would actually say 'ok, we only produce Drum and Bass from now on' and perceive ourselves as sole Drum and Bass artists, then we would create a blockade for ourselves. (J. Asiedu, personal communication, April 7, 2018)

Nevertheless, even though genre plays no essential role in the production of music, it is still a present topic in distribution and marketization. As Raphael stated:

> Nowadays I think it is almost more important to stand out a bit in the overarching genre [...]. I think it is more important to position yourself well. So that you focus on getting into certain playlists, which are supported by Spotify or which simply get shared by big users with many subscribers, and so on. However, I think this genre-specific thing – I am not paying attention to that at all anymore, because there is so much nowadays that one cannot even know in which genre he or she belongs. (R. Lott, personal communication, April 5, 2018)

Further, occasionally, the collaboration with labels can interfere with the notion of genre. As labels usually follow one certain strategy in their releases, sudden influences of another genre in an artist's work can be "unacceptable for the label" (J. Asiedu, personal communication, April 7, 2018). Therefore, their expectations for a specific output of the artists can have a strong influence on their creative production. However, other platforms such as SoundCloud, Youtube or Bandcamp are then instrumentalized as a distribution channel for music which does not comply with label expectations.

> For ourselves, this is something we accept, and most of the time we […] just offer this [music] for free on SoundCloud. (J. Asiedu, personal communication, April 7, 2018)

The marketization of music seems to get promoted, undermining the freedom of creative expression. As in the art world, the mass production of artworks contradicts the traditional valuation we perceive towards art. Before, our understanding of a particular market's valuation was driven by expert opinions, including those of artists, whereas now art gets evaluated based on metrics rather than on aesthetics (Lee, 2018). As already stated in the theoretical framework of this thesis, Spotify, for example, also includes a sentiment analysis on how people talk about a song or an artist in their recommendation system (Prey, 2016). However, even though this approach seems to make the concept of genre in theory obsolete, through these recommendation systems and their *bubbles* the influence of – at least something like – genre can persist. In fact, the musical filter bubble artists surround themselves with can have a subliminal influence on their creative process.

> Subconsciously, I would say. Through the music, you are listening to, and the way texts are written, or how songs are arranged or built up, this is indeed different. Of course, there are different genres. There are certain regularities, and subconsciously you partly acquire them. If I write a song and then listen to the finished version I notice that it is inspired by something specific or I see the parallels to a song, which I had listened to up and down for three weeks. You cannot do anything about it, right? However, this is, again, not consciously or considerate. (J. Schaffhauser, personal communication, April 8, 2018)

The question is, whether this musical filter bubble influences artists, who are also consumers of subscription services, positively or negatively. A filter bubble could enhance inspiration and facilitate creativity, or it could do the opposite. As Eli Pariser (2011) stated: "… the filter bubble has dramatically changed the informational physics that determines which ideas we get in contact with. And the new, personalized web may no longer be as well suited for creative discovery as it once was" (p. 125f.). On the contrary, listening to recommended songs can also lessen the risk of a filter bubble, as the exposure to more diverse top recommendations gets increased (Nguyen, Hui, Harper, Terveen, & Konstan, 2014). The subconscious impact that a musical filter bubble may have or may not have on an artist's creativity, therefore, constitutes a highly attractive field for future research.

4.3   Non-Creative Labor

The most vital parts of non-creative labor are matters of distribution and promotion and subscription services offer a platform for both. The incredible reach of vendors like Spotify leaves especially small artists in a tight spot of offering their music basically for free, just to be represented on these platforms.

> Only people like Taylor Swift can allow themselves to say, 'I am going to publish nothing on Spotify anymore' or 'you only get half of it there and if you want to hear it completely then come to Tidal'. That kind of artists can afford that. But nobody cares two hoots about a newcomer doing that. Either you are publicly discoverable there or not and if you are not publicly visible nobody will know you exist. (T. L. Booz, personal communication, April 11, 2018)

4.3.1 The Commodified Self

However, a definite benefit provided by subscription services are insights into demographic and behavior-related user data. As the artist brand becomes increasingly important, the datafication of their listeners could support those artists on their way to success. Some of the respondents actively used this benefit, by acknowledging, following and interpreting the results.

> I can clearly see that 86% of my listeners are male and only 14% female […]. I can also see that most of the listeners are between 18 and 22 and on that basis, I can suppose that […] they rather go to a club instead of sitting at home analyzing all the bits and pieces of a song. (R. Lott, personal communication, April 5, 2018)

> If I look at 'Rain on my Skin', I see that, naturally, most of the time we get listened to in Germany, so at home [laughing], followed by Switzerland, Austria, then the United Kingdom and then directly America. So, I can actually see everything. (M. Vonsin, personal communication, April 11, 2018)

The data perceived on these platforms can have intangible and tangible impacts on artists. Jonas, for example, is influenced by the data he gets about his listeners in a way that lets him realize that people really listen to him and acknowledge his music. The knowledge, that they enjoy what they hear and that they might have expectations of what comes next, functions as a motivation for him to improve his technical skills to offer a better listening experience.

> Of course, it is something that pushes us. It shows us that there are listeners and accordingly we want to improve ourselves technically […]. That is the

will to learn something, of course also for yourself, but also for the people that listen to your music. (J. Asiedu, personal communication, April 7, 2018)

A more tangible impact can be seen when looking at Mark's and Felix' experiences. For both, the information about the cities their music is mostly played in help to plan concerts or even tours more efficiently. In both cases, the cities their bands were located in, were not listed under the top cities on Spotify.

I am saying that Spotify is the most important thing for an artist. You can plan a tour on the basis of Spotify, for example. I can see that number one is almost always Munich for us. So, we have the most fans in Munich, followed by Berlin, Hamburg, Frankfurt and then already Zurich, which is not even Germany anymore. Based on this data you can see where people celebrate you […]. In the end, people that organize a tour for you look at this data. (M. Vonsin, personal communication, April 11, 2018)

This is pretty interesting, we are located in Regensburg, but Regensburg is maybe in position fifteen of all the cities when looking at the listeners […]. And because we have a bit of history in the north – through a victory we were allowed to play at the Hurricane Festival – […] our numbers are way higher in the north than in the south. And we noticed […] that exactly in those cities, where we had many listeners on Spotify, there were many [concert goers] too. So, that was an excellent predictor [...]. I assume that when we plan the next tour, we are going to orient ourselves actively on that. (F. Hirn, personal communication, April 28, 2018)

The knowledge retrieved from subscription services, therefore, provides a chance for smaller, unknown artists, which need to watch out for their financial situation, to allocate their resources more efficiently.

Further, user data can be not only massive support for tour planning, but also for social media strategies. Knowing the correct target group, for example, their age, gender, and location, can be a great benefit which helps to address the right people.

In the area of Facebook or Instagram - if you want to invest in that – you can target those specific countries. Alternatively, if you say I want to get famous in the USA or Germany [...], then this is an excellent help to analyze what is happening where. Where do I need to invest more and where do I want to go? […] What we always optimized are Hashtags and so on […], which is especially vital on SoundCloud […]. So, you use the right hashtags in the right order. (C. Stötzer, personal communication, April 9, 2018)

Artists can hence influence their audience recommendations partially through determining how people talk about them online. Nevertheless, through the internet, primarily

through social media and digital music distribution, one could think that the place of origin does not influence geographical success anymore. However, Verboord and van Noord (2016) found that offline inequalities cannot yet get compensated through online resources, e.g., coming from social media platforms. Artists from certain vital cities still experience higher exposure to users and media critics. The power of offline engagement relative to social media should therefore not get underestimated. The user data provided by Spotify can thus help to reasonably invest in concerts in those cities, where the exposure is already powerful.

Especially this last example shows how subscriptions services and the data they provide can enable even small artists to facilitate their global reach with an efficient financial approach. The question arises if these benefits can be perceived as a way through which Spotify and Co. pay for the music on their services, as they help artists to save money on other matters. However, some respondents mentioned that before Spotify and also now while they have access to Spotify data they retrieve many insights from other platforms too. SoundCloud, for example, was mentioned several times as a data source but is mostly used by musicians focused on electronic music. Further, business profiles on Facebook and Instagram were mentioned as providing demographic user insights. Therefore, the current value of user data can be questioned as a medium of exchange for the music artists provide. From the artist perspective, the USP of subscription services gets, at least partly, dispersed through multiple social platforms. Moreover, some of the respondents did not even consider the possibilities of user data. Notably, these respondents were those with smaller numbers on Spotify than the rest. This, however, leads to the question of why especially small and relatively unknown artists refuse to rely on user data to facilitate their reach. One reason could be that only a certain number of streams leads to reliable reports about patterns in their users' listening behavior.

> In my case, all of this is still so scattered that it is not possible to deduce anything. (T. Mitsch, personal communication, April 5, 2018)

> I do not know if there is one critical number when it starts making sense. However, I would say under one thousand people, one thousand listeners, one cannot rely […] on the demographics. (J. Schaffhauser, personal communication, April 8, 2018)

Another point hindering artists to capitalize on the user data they are provided with is the obfuscation through the sheer volume of this data. Obfuscation is an attempt of concealment through confusing or misleading data. An example of this are file sharing services,

which protect their users by covering transactions through a vast amount of IP-addresses (Brunton & Nissenbaum, 2013). This obfuscation stands in contrast to the alleged data transparency of these services as artists are first required to gain analytical skills to understand the provided mass of data thoroughly.

Summarizing, datafication, at least partially, caused a change from editorial to more demand-driven approaches in the music industry, as stated in the theoretical framework (Poell et al., 2017). Nevertheless, as we have seen in the last chapter, the creative production is only marginally influenced by user data. However, regarding distribution, artists have the possibility to profit from their insights into user behavior if used correctly.

4.3.2 The Financial Dilemma

When it comes to the financing of cultural goods, subscription services do not enjoy the best reputation. However, they still create the possibility for a mass of small artists with little financial resources to distribute their music globally. Several respondents pointed to the advantages that come with the use of subscription services:

> When you think about that thirty years ago when we would have started making music, we would have needed to press or burn CD's first. And that would have been extremely much money. Nowadays, you pay ten euro per year, and your music is offered on all platforms. Of course, you have high standards there but, in the end, it has gotten incredibly easier to get in contact with your fans. (M. Vonsin, personal communication, April 11, 2018)

Nevertheless, as already analyzed in this thesis, those services might facilitate the global reach of artists, but transform their music from a product to a tool, which hinders the direct generation of revenue through it.

> Compared to before, it is way easier to get reach and to get known, but compared to the past, it is also way harder to earn money with it. (F. Margraf, personal communication, April 10, 2018)

> It is completely marginal everywhere [on every platform] and I would sign the claim – yes, you cannot earn money with music, except you are maybe at Universal. But probably even that gets hard. Which means it is really only about reach. (M. Scholze, personal communication, April 8, 2018)

Surprisingly, four respondents used exactly the same metaphor for the mindset change of music consumers:

Nobody is up for paying five euro for a youth center concert even though they spent seven euro for a coffee at Starbucks two hours before that. (K. Koller, personal communication, April 5, 2018)

All four critically put the amount spent for music and for coffee in relation. This points to a tremendous shift in our societal values and the devaluation of culture. The streaming industry, led by Spotify and Netflix, convinced consumers that they do not really need to own cultural assets to enjoy them. This, however, eradicated the perception of scarcity, abruptly decreasing the value of music or movies (Wolk, 2015). On the contrary, a coffee needs to be owned to be able to consume it, which lifts the monetary compensation people are willing to give above the one of cultural assets. This finding also adds to the findings of Atasoy and Morewedge (2018), who discovered that digital products are always perceived with less value than physical ones. The reason for that is that consumers psychologically experience a stronger feeling of ownership with physical products (Atasoy & Morewedge, 2018). Moreover, whereas streaming make listening to music more convenient, cheaper and less risky, it also diminished the multi-sensory experience and facilitates a less tangible connection to artists (Luck, 2016). The need to evoke a second change in the mindset towards cultural value becomes visible, as culture is not only music, cinema or theatre, but a question of societal orientation.

It becomes clear, that the difficult financial situation creates a conflict, especially for smaller artists: They are dependent on the affordability and the reach that gets facilitated through subscription services, however, they earn significantly less than they did before:

Indeed, I am kind of […] stuck in a dilemma. I want to be represented on Spotify – in general iTunes, Amazon […] but I kind of cut myself in my own flesh with that because […] I sell significantly less than with 'Mondsucht' [the artist's first album] […]. 'Mondsucht' was only available on CD back then and people bought this CD. Now […] people listen to it on Spotify but with Spotify one sadly earns very very little. (F. Margraf, personal communication, April 10, 2018)

Further, the collaboration with a label does not necessarily mean that those artists earn more money: If the revenue made through subscription services is low and does not surpass a certain minimum, labels tend to withhold the money.

Through that [subscription services], I do not get anything. I mean a little bit comes around, but labels have a lot of minimal limits, under which the label withholds the revenue as they also need to finance their process. And I know that, back then, where I did something with my mate on my own, we got a

little bit streaming revenue. But I mean, within a month this was in the sin-gle-digit Euro area. (M. Scholze, personal communication, April 8, 2018)

The minimum amount of revenue that Timo's song needed to generate were, for exam-ple, three hundred Euro. The major issue in this case is, that, until three hundred Euro are exceeded via streaming, the song needs to get played by a high number of listeners. There-fore, some artists never receive any money. But if they do, as stated by Manuel above, the revenue made from streaming is vanishing low. Therefore, with the exception of one musi-cian, all other respondents need a second foothold, either music-related or not. The one ex-ception is Mark, whose Band's song *Rain on my skin* was picked by Spotify and curated into some of their playlists. After that, a musical institution in his city decided to support him and his band members and even enabled the contact with major labels. However, Mark said that now, in this time of surprising success, he wants to try to make a living out of his music but admitted that in every other case, he would need a second foothold too. For all twelve other respondents a second foothold was unavoidable: Not a single one would be able to make a living out of her or his music alone, even though quite a few aspire that. Through that "at least [...] the existential component is out" (K. Koller, personal communication, April 5, 2018).

The under-compensation of creative work as well as the uncertainty accompanying it add to the criticism on labor conditions in cognitive bio-capitalism, in which relational and digital labor have become more popular. In cognitive capitalism a distinction between life and labor loses meaning and, through a lack in income, individuals get pushed into a precari-ous existence (Fumagalli, 2015). Even though the subjective rewards of musical labor, such as emotional satisfaction, are beneficial, making music is still work, not only pleasure. The perception of artists that they need to accept underpaid work until they eventually get suc-cessful leads to self-exploitation and in the end harms all other workers in the industry as well (Woo, 2015).

The advantage of a second foothold is that the pressure on delivering valuable creative output gets eliminated. In this case, a creative crisis is not an existential threat but can be patiently endured. However, a definite downside of the need for a second foothold is that significantly less time can be spent on making music. Therefore, the urge to make money to provide for themselves collides with the desire to work on their own music. In Konstantin's

case it interferes with the time that independent artists need to spend on promoting themselves:

> We also did that [videos] on our own […], which, on the one hand, is really good, but on the other hand – what are you doing with your time? I need to earn money, I want to make music. Videos are great, and it is always fun to create something like that but […] it also devours so much time. (K. Koller, personal communication, April 5, 2018)

Media workers find themselves in a challenging condition in which they need to organize their own working conditions so that they "support and sustain the creative process needed to meet the demands of a global market saturated with media" (Deuze, 2016). A second foothold, therefore, intervenes with their chances to make themselves competitive in the market.

As stated at the beginning of this thesis, to get financially stable, artists need to replace the revenue stream, which was before made through traditional sales or downloads. One commonly known method to do that is the playing of live gigs. Even though many of the respondents named live shows as their primary revenue stream, a surprising finding was the struggle of many to get paid gigs. The conflict, in this case, is that artists want to make music and get the chance to expand their network but want to avoid a reputation of playing for no or very little money. Further, playing non-paid gigs would only be another way of offering work for free.

> It is kind of a conflict: Of course, you love to make music, and you want to play as much as possible, but eventually, you reach a point where you say 'ok, I need to start making money at some point and I just cannot do everything anymore'. (K. Linn, personal communication, April 10, 2018)

Another revenue stream is ensured through the German collecting societies, which collect and distribute royalty fees towards the copyright owner of a song. Most of those artists that have a contract with one of those societies expressed thankfulness and praised the system.

> It is a super opportunity for composers to earn money. I am so happy that this exists! (K. Linn, personal communication, April 10, 2018)

Nevertheless, the revenue made through collecting societies was always mentioned as a small figure, which only gets transferred once a year and therefore does not guarantee much more security.

Another way would be the selling of merchandise at live shows. Even though a little effort needs to be put into designing the products, the profit margin is relatively rewarding.

> As an artist, you have the most significant margin in the beginning through merch, because you can print shirts for three euro and then sell them for twelve. (J. Schaffhauser, personal communication, April 8, 2018)

However, the success of live sales can be strongly genre-dependent, as fans of electronic music certainly do not want to buy merchandise products at live sets. As DiCola (2009) found through a survey with 5000 musicians, only one-eighth of the respondents earned any revenue from merchandise and for those who did it accounted on average for 14% of their revenue stream. This shows that merchandise is not, as expected, a primary revenue stream for many artists which leaves them, again, in need for alternative ways of making money.

Furthermore, Christoph, for example, used YouTube as a revenue stream:

> Through Tunecore, for example, you can monetize YouTube videos, so also external YouTube videos, which use your music. In the beginning, that was a good possibility as a source of income. (C. Stötzer, personal communication, April 9, 2018)

An additional possibility is an application for state or private funding to get supported. This support can either include financial assistance or the invitation to seminars, the provision of coaching or the organization of promoted gigs. However, the provision of this support needs to be preceded by a protracted application process.

> Now in June and July […], we play some concerts in Switzerland and Germany and […] we are missing out on the money. We hardly do not get any salaries, which means we have spent the whole last week writing funding applications […] to at least cover travel and accommodation costs and, if possible, to pay a bit of salary to the other musicians. (K. Linn, personal communication, April 10, 2018)

> What I would do now [after the production of a release] is most certainly contacting cultural funding to see, […] if I can get money, […] maybe coaching, or some features, or something like gigs for which you get an extra promotion. (J. Schaffhauser, personal communication, April 8, 2018)

A significant issue, which still hinders progress in the area of financing, stays the non-transparency of settlements that artists receive. As the digital distribution of music is most often executed via multiple platforms, the settlements are either overwhelmingly taken

apart into the smallest pieces or remain under closure. This adds to the obfuscation argument which was made before: Artists get hindered to understand the revenue stream coming from subscription services thoroughly, which stands in the way for a self-induced change.

> Until now, I have not seen a euro in my direction […]. Mainly, probably, because those are still such small amounts […]. Moreover, there is the sales department in the background, where a bit of money also goes into the promo. So with three hundred downloads, which are maybe three or four hundred euro, I think, that the money is gone very fast […]. What would be interesting for me is stuff like Spotify because I do not have any overview at all. (T. Mitsch, personal communication, April 5, 2018)

> The settlement I get is not disassembled into every item, so what comes from where. It is very incomprehensible. (R. Lott, personal communication, April 5, 2018)

The whole problem induces a certain financial self-exploitation of artists. Frustration gets fomented, as some of the respondents professionally studied music for several years on university level but cannot rely on making at least the slightest bit of money.

> I do not accept it anymore […] to negotiate with people to then do some jobs for fifty euro or something like that. After six years of musical studies? No. Not even a craftsman would come into your apartment and just look at your washing machine for this money. (T. L. Booz, personal communication, April 11, 2018)

4.3.3 Promoting the Artistic Self

The branded musical experience, which subscription services offer through their recommendation systems, is often their only method of differentiation to other services. Therefore, their recommendations are not always only influenced by objective user data but also their own interests of positioning themselves as a unique brand (Morris & Powers, 2015). Hence, artists need to assert themselves not only against the increased competition on these platforms but also the subjective algorithms of these platforms to get their listeners' attention. One respondent, for example, emphasized music as a tool he uses to extend the experience of a concert in the mind of the consumer.

> Streaming services are more a possibility for fans to listen to it prior [to a concert], or to listen to it after, to stay in contact and that is a significant advantage. (F. Hirn, personal communication, April 28, 2018)

Through that, attention, measurable through streams, clicks or likes, becomes a kind of capital for artists. However, attention is very scarce and limited in the digital era (Terranova,

2012) and receiving this capital and making an income out of it, requests professional skills, which most of the artists cannot provide on their own. In the race for attention, some new ways of promoting music appeared for artists, enabling them to make themselves competitive on these platforms: One of them being playlist promotion.

However, the concept still seemed to be new to most of the respondents or at least something they have not actively pushed until now. Two of the respondents were promoted through playlists curated by Spotify, which leveraged the number of their streams tremendously. In that case, Spotify functioned as an unexpected springboard enabling a more significant reach.

> You can reach people, that you probably would not have reached otherwise. Primarily through the 'Mix of the Week', this is honestly a treasure trove for us, also for contacts and fans. (F. Hirn, personal communication, April 28, 2018)

> Music gets faster available for those that are interested in it. Especially with those recommendations by Spotify, [...] which are curated. I think as an artist you reach people way faster, especially time-wise. (R. Lott, personal communication, April 5, 2018)

> Through that, every possible artist gets the possibility to land on the screen. Everybody gets the opportunity to land in somebody's ear. (J. Asiedu, personal communication, April 7, 2018)

For Mark, the pick of one song through Spotify changed the exposure of his song extraordinarily and generated a significant reach.

> I think Spotify is handling it like that that the more listeners a song has, and the more save a song in a playlist, the higher the ranking of the song gets. So, you also get into a new playlist and, therefore, get displayed to many others more [...]. There are these playlists generated by Spotify like Discover Weekly [...] and Release Radar and Your Daily Mix. So right in the beginning, there was Release Radar, which picked our song and then we had 6500 streams on one day. On one single day! (M. Vonsin, personal communication, April 11, 2018)

Until now, it is not possible to directly pay Spotify for getting into these popular playlists. This approach of making revenue could get Spotify in a conflicted position as users trust Spotify's quality and expect a curation of releases on expert-level, not based on money streams. Subsequently, Felix H. tricked the mentioned algorithm procedure of Spotify: To fa-

cilitate a playlist promotion without investing much money his band used social media platforms like Facebook to influence the user behavior on Spotify. Their approach, for example, motivates their fans to include a song in their playlists, which gets noticed by Spotify algorithms.

> At one point […] – because we know that when songs from old playlists are moved into new playlists or just an album is moved to a playlist, they get a higher ranking – we tried to push this on Facebook a little bit, that people create a playlist with our song in it. (F. Hirn, personal communication, April 28, 2018)

This shows that while Spotify, as well as Facebook, are algorithm-driven, they are nevertheless connected to the offline world, enabling the artists to, at least partially, game the system. The virtual and physical lives are strongly interconnected, and creators do not act isolated in the digital world: They are surrounded by families, friends, the public and whole institutions, such as universities, distributors or publishers. This social context, therefore, still has the power to shape the online world (Taylor, 2014).

Social media, in general, stays a marketing tool remaining in the hands and responsibility of the artists. The time that artists spent on social media platforms is positively linked to the purchase intent of their fans and makes them less likely to illegally download music (Daellenbach, Kusel, & Rod, 2015). Thereby, Facebook, Youtube, Twitter and Instagram help users to sell their personal brand across the internet and increase prominence and recognition (Khamis, Ang, & Welling, 2017).

As a remarkable number of respondents complained, the positioning of oneself on social media is necessary nowadays as many only get their reach through their visibility on social media, not because of their musical talent.

> There is so much necessary around it. There is so much which is not music. Music is the smallest part. It is the whole image, a certain hype, and it does not matter whether it is natural or artificial. Also, artificial hype leads to natural hype and big labels know that and use it. (C. Stötzer, personal communication, April 9, 2018)

Social media platforms can not only be used for sole promotion, but also as communication devices with possible partners, slowly replacing traditional communication channels.

> We often get contacted via Facebook or Instagram if we want to collaborate – also concerning bookings. (M. Vonsin, personal communication, April 11, 2018)

Meanwhile, I get – I do not know – fifty or sixty percent of my jobs via Insta-
gram. (F. Margraf, personal communication, April 10, 2018)

It can be seen that social media platforms not only provide artists with a vast amount of

data about their fans but also with a possibility of partner or gig acquisition. The extension of

Facebook into the rest of the web and its "drive to make external web data 'platform ready'"

(Helmond, 2015, p. 1) composes a potential threat for subscription services. Social media

platforms partially diminish the data subscription services have to offer to artists and at the

same time help the empowerment of the latter through new ways of marketing and commu-

nication.

Other musicians actively use social media platforms as a way to find inspiration. As crea-

tive processes of other artists are visible as well as semi-professional reviews and recom-

mendations on blogs, the research process of artists can get immensely simplified.

I am following a lot: What are other artists doing? How do they approach
things? I am just very interested in the creative process. In general, through
the internet […] you realize how others work and you always get an idea
through that, like: 'Hey, I could do this in my case like this and this.'. (F. Mar-
graf, personal communication, April 10, 2018)

However, the importance of social media in the music industry stands in hard contrast

to the specialized skills and the knowledge that is required to plan a solid social media strat-

egy. Several respondents expressed uncertainty towards the right strategies on marketing

platforms. Timo, for example, mentioned as the reason for his insecurity on social media the

absence of a professional intermediary between him and his followers. Every post directly

reaches the consumer, which can provide a particular closeness to the listener but can also

mean that an unprofessional or disadvantageous post can be seen by everyone.

I honestly cannot estimate to what extent I am good in social media and that
stuff [laughing] […]. Honestly, I think it is not that easy. I always have the
feeling social media changes every two minutes. (J. Asiedu, personal com-
munication, April 7, 2018)

Nonetheless, Facebook gets more and more questioned as a reliable marketing plat-

form. Maybe because professional marketing skills are missing, the reach of Facebook posts

is perceived as unpredictable.

Especially with Facebook, I have the feeling […] I just cannot comprehend
this algorithm. Some things, which are utterly absurd, have an incredible
reach, while messages about a release of an EP or so only get a handful. I do

not get what reaches the people and what does not. (J. Asiedu, personal communication, April 7, 2018)

This, again, adds to the point of obfuscation, in other words, the burying of the artist under data. It also indicates the sheer impossible expectations towards artists to have professional skills in so many varying disciplines.

At the same time, Instagram gets increasingly relevant as the primary way of communication. Through this medium, artists can fulfill the expectations of sustaining an ongoing interaction with their audiences through the displaying of intimate moments. Nevertheless, this relational labor challenges artists to balance their own needs and the wish of their audiences to connect with them continually. Nowadays, this constant communication flow is central for many careers, however never directly compensated (Baym, 2015). Further, especially Instagram requires very personal insights into the lives of the artists. This adds to the giving away of emotional and personal information, which already happens while writing, producing and distributing own music. The commodification of the artist, hence, requires the giving away of privacy, facilitated by the need to be "always on" when it comes to social media. The singer H.E.R. is an excellent example of how a developing artist tried to avoid the constant exposure on social media: She decided to release her debut EP anonymously to become successful only for the sake of music, which protected herself from social media and additionally functioned as a helpful marketing method (Robehmed, 2017).

Recapitulating it can be seen that the increased competition nowadays made image, identity, and branding more crucial than ever before. In the contemporary media landscape, artists are required to put much creativity not only in the production of their artifacts but also in their self-marketing. This leaves them in the conflict between the time their creative work consumes and the time that is needed for the successful marketing of their brand (Sjöholm & Pasquinelli, 2014).

Maybe, therefore, most of the respondents had one thing in common: the non-enjoyment of marketing measures. Especially those connected to social media platforms are merely perceived as "a necessary evil" (J. Schaffhauser, personal communication, April 8, 2018).

4.4   Something Old, Something New: Intermediaries in the German Music Industry

Rather than facilitating an open exchange between musicians and their listeners, the internet has increased the intermediation between producer and consumer. This can be led

back to the need to compensate for the lower revenue from record sales through extensive promotion or alternative forms of compensation (Negus, 2014).

After the rise of subscription services, networking was and stays the foremost way artists try to socialize with these intermediaries and to bridge a precarious financial situation. Every single respondent expressed the importance of a suitable network as supporting the way to success.

> It [networking] is everything […]. Let's say, if you want to make a little bit of money with it then you definitely need to know the right people. (R. Lott, personal communication, April 5, 2018)

4.4.1 The New, Empowering Players on the Field

What changed, however, are specific networking partners, which emerged or rose within the last years. Evident intermediaries are for example the subscription services themselves. Their incredible reach empowers them to decide over the success of an artist.

> Spotify basically recognized through their algorithm that 'Rain on my Skin' went down well with many people and then pushed that song. (M. Vonsin, personal communication, April 11, 2018)

Perceived more as a marketing than as a sales platform, subscription services, especially their employees, are considered as new possible networking partners.

> One time, we also looked for contact opportunities for employees from Spotify, which curate them [playlists], because bands we know made it in there without money. However, unfortunately, that search was unsuccessful. (F. Hirn, personal communication, April 28, 2018)

Other examples are digital distributors, which enable musicians to upload their music on subscription services without the need for a label. These distributors are perceived with great thankfulness because of the ease and the affordability that comes along with their service. Some of them even offer support for artists to get discovered on subscription services, for example through playlist promotion.

> Things like these distributors, which somehow offer all of this stuff on every possible streaming vendor […] are, I think, a great thing. Otherwise, it would cost me much more time if there was not this possibility. (J. Schaffhauser, personal communication, April 8, 2018)

> There is for example 'Spinn-up'. I also have that now […] as they look for a few placements in playlists and that is crucial if you want to get reach. (J. Schaffhauser, personal communication, April 8, 2018)

Digital distributors further function as a safety net for the case that a song is not picked and released through a label.

> Then you try to position a song under a big label or if everybody says no, you can still decide to release it on your own via Tunecore for example. (C. Stötzer, personal communication, April 9, 2018)

It seems, that even though this newly emerged intermediary is also positioned between the artists and their listeners, it still adds to their independence and autonomy. Another example of that is the revenue generation through YouTube, as mentioned before.

Influential users on Spotify or Youtube and social media influencers are additional networking partners, which increased in importance through the recent developments in the music industry. The networking and collaboration with these mediators can increase the reach of an artist significantly.

> Influencers are significant to us. We know someone personally, and she has eighty thousand followers [on Instagram] and if she posts a song then certainly some more people listen to it than just from our site. (M. Vonsin, personal communication, April 11, 2018)

> With Spotify, it is like that that you try to coordinate with friends. For example, a mate of mine […] makes a weekly pick every week […] and presents new music. You just try to get a feature in your surroundings maybe once a month and this is also based on mutuality. (R. Lott, personal communication, April 5, 2018)

Alternative platforms, however, do not seem to be a genuine alternative when it comes to reach and revenue. The few respondents that already gathered experiences in the field reported about shallow revenue streams, also due to the non-existent recommendation system of platforms like Bandcamp. The reach on these platforms is therefore dependent on the reach created through other promotion measures. Jonas, however, uses platforms like Bandcamp as a possibility to distribute songs, which escape his usual type of music. Therefore, alternative platforms may not provide a credible option for revenue generation, but they can function as an enabler of creative freedom.

4.4.2 The Persistence of Old Intermediaries

The collecting societies system in Germany is a somewhat traditional intermediary. However, they are perceived as a helpful partner, because of their support for artists in royalty collection. More than one respondent mentioned that other countries probably envy Germany for this functional system.

> The GEMA is a great thing, and I think that the whole world, especially the
> USA, is pretty envious of such functioning copyright as we have it here in
> Germany. (J. Schaffhauser, personal communication, April 8, 2018)

However, some artists questioned the usefulness of collecting societies like the GEMA and expressed their confusion about the particular settlement- and organization-matters. This, again, points to a certain obfuscation and non-transparency of these intermediaries and is adding to the power imbalance between traditional intermediaries and artists. Kira, moreover, needs to give forty percent of her GEMA revenue to label, even when the revenue was made through her playing her own songs at a gig.

This leads to a second intermediary, whose role changed with the rise of streaming platforms: the labels. A surprising finding during the data collection phase was that except for one respondent all others which released their music through a label were not exclusively signed. This means that they were able to conduct their creative process in absolute freedom and after that started to search for possible release partners. Such collaborations then enable artists to leverage on the network and expertise of these labels. On the one hand, this seems like a big step in the direction of real independence of artists, however, as said before, the collaboration does not mean that the artist is financially supported. As stated before, in some cases, the generated revenue whose generation was backed by labels does not even reach the artist. Further, the wish to release a song through a particular label can have a significant influence on the creative process, too. Therefore, the independence of artists within non-exclusive label relations needs to be questioned.

4.4.3 The Desirability of Cultural Intermediaries

In general, some of the respondents perceived the number of intermediaries they see between them and their listeners as high and some others as low. This can also be led back to the very different details they provided regarding their network. Musicians still have the choice whom they let participate and whom they exclude within their value chain. Only subscription services and one distributing intermediary, either a digital distributor or a label, seem to stay compulsory.

Even though many artists enjoy the do-it-yourself approach and like to be in charge in every single process affecting their artistic outcome, many of them also like the support from professional intermediaries. As Julien stated:

> Because of that reason, I do not have a problem with them [intermediaries], because none of these actors has anything to do with my creative process. (J. Schaffhauser, personal communication, April 8, 2018)

Shortly after the turn of the millennium, Keith Negus (2002) wrote that "cultural intermediaries reproduce rather than bridge the distance between production and consumption" (p. 509) and "like much of the imagery, words, and symbols they are engaged in constructing and circulating, they offer the illusion of such a link rather than its material manifestation" (p. 509). However, after new intermediaries, such as digital distributors or social networking platforms, enabled an almost unconstrained relation between artists and listeners, the wish for even more intermediaries seems to rise. Some respondents expressed their longing for more intermediaries, which would take over non-creative tasks in a professional manner. Through that, the artists would be allowed to focus solely on their creative process and what they want to do: making music.

> The aim is that this tilts at some point, that it changes. That the creative part rises and that is the reason why you have people at some point that take care of booking, tour-management, the general management or social media stuff [...]. So that you can do what you really want to do: being creative. And that you do not get disturbed by all this other stuff. (T. L. Booz, personal communication, April 11, 2018)

As Hracs (2015) found, in diverse music centers, such as Toronto, DIY artists tend to collaborate on specific creative and non-creative tasks with varying contractors. One intermediary which is more and more sought-after in this landscape is the freelancing manager. These managers can get hired on-demand and provide support in operational business matters, including the connection, coordination, and curation with these contractors. This model might represent an ideal future intermediary network for artists, leaving them the freedom to create their music without the need to worry about non-creative tasks. Of course, this intermediary also requires a certain revenue share, but these managers can spontaneously get hired upon request as soon as the financial situation allows it.

Encapsulating, a certain process of reintermediation in Sharing Economy markets, as found by Graham, Hjorth, and Lehdonvirta (2017), can be proven when looking at the music industry. New intermediaries emerged, which have some positive influences on the work process, while simultaneously capturing part of the earnings belonging to the artists. In general, old intermediaries in the music industry seem to persist, and new ones seem to rise. Because of that and because they stay desirable, at least for some artists, the question arises

how a particular reciprocity, which the word *intermediary* already indicates, could be ensured. Marketing and PR intermediaries could not only connect production to consumption but also lead back social knowledge from the public into the production and marketing process. The need for a functioning system, which enables producers, intermediaries, and consumers to justly capitalize on each other in the future, becomes obvious (Negus, 2002).

4.5 Musicians' Perceptions on the Renewed Media Landscape

The following chapter is going to present the findings on the perceptions that artists have towards the recent disruption of the music industry. Further, it is also going to show the different ways with that artist answer to a possible dissatisfaction facilitated through these changes.

4.5.1 The Two-Sidedness of Subscription Services

In general, subscription services are faced with very double-edged opinions. On the one hand, they are perceived as a curse, disrupting long-established processes.

> I am dissatisfied with Spotify – there are other platforms like Deezer, which distribute more money. However, Spotify has this monopoly – they have the most listeners, and through that, they can request the least money. (C. Stötzer, personal communication, April 9, 2018)

On the other side, those services can be a blessing by catapulting unknown artists to a successful reach within hours, as can be seen in the stories of Mark and Felix H. But through these success stories newcomers feel the need to be represented on these services to get successful, even though they cannot monetize their music.

However, subscription services tremendously lower the external appreciation artists perceive for their music. On the one hand, the low revenue they receive from streaming reduces the perceived monetary appreciation. Musicians are not paid for their creations anymore, but for everything around it. Further, the mass of music available and the accompanying change in listening behavior diminishes the appreciation for their output, at least in the artists' eyes.

Nevertheless, there are also artists who still feel a certain appreciation from their listeners – most of them, however, link this feeling to the experiences they made at their live performances when they witness that people are actually enjoying their music. Jonas even stated that for him illegal downloads also mean that his music gets appreciated. The perceptions in this matter are indeed very dependent on the individual characters.

It is solely dependent on what appreciation an artist expects. I mean ok, an artist can say 'I made a song, I want you to celebrate it, I want you to appreciate it because […] we made this with our own hands, so please cherish it.' This is certainly a possibility of looking at this. However, I think that it is also alright, especially through Spotify, to just land on a screen. So […] you should not perceive this as competition, but that people appreciate it and use Spotify to also get in contact with more unknown songs and artists. (J. Asiedu, personal communication, April 7, 2018)

The perception analysis, in general, revealed an expected bi-directionality between, on the one side, high pressure and uncertainty and, on the other side, enjoyment and pleasure. The high pressure gets especially facilitated by the increased competition in the market and the need for technical development. However, the increased competition also stands in relation to the ease to distribute own music nowadays.

It is super hard to stand out of in this soup, but I mean, it was also super hard before to get picked by a label. (J. Schaffhauser, personal communication, April 8, 2018)

Additionally, uncertainty gets facilitated by the unsteady revenue flow, generated through subscription services, and further, the non-transparency of this revenue flow. Artists remain with a feeling that even good work is not good enough.

On the other side, making music stays a job which is highly connected to personal passion and can provide a strong feeling of fulfillment. As many artists noted, the creational aspect, the feeling of standing on a stage at a live show and the possibility to do what one loves and reaching people through it provides a high amount of enjoyment.

Labor as a musician is also defined by the powerful strive for more and the hoping for the big breakthrough. This striving enhances the pressure, as many of the respondents answered, that they need to put more work and effort into their music to finally get successful. However, Mark's success, which resulted from only a few months of making music and a pick by Spotify, tells otherwise. The breakthrough point seems to become more of a myth nowadays, as one respondent mentioned:

In the past, when you were known – there were these points that you needed to surpass, and then you just were famous [...]. Nowadays, everybody makes music, and everybody is everywhere, and through that, you also fall back down very quickly. (F. Margraf, personal communication, April 10, 2018)

The respondents further evaluated the closeness and distance of their relations with their consumers mediated by subscription services very differently. Whereas some perceived the relation as more distant, others felt closer to their listeners, e.g., through knowing their demographics. This closer relation was, however, also criticized, for leading to more commercialized music.

4.5.2 The Lethargy of Artists

Regarding the disadvantages that subscription services bring, and which were listed before, artists seem to position themselves in a state of lethargy and rather keep an emotional distance than actively change something.

> This is hard and dangerous, so to be said, if you do not keep a certain distance. Because then you get very dependent from factors, you cannot answer yourself. As, for example, that Spotify is pushing only big artists. Right, and if you keep a certain [emotional] distance, then it is healthier for yourself. (C. Stötzer, personal communication, April 9, 2018)

Julien, for example, actively tries to change some standards which got established in the market. In his opinion, artists are responsible for standing up against unfair behavior through simply not accepting every treatment. This resistance to the hegemonic applications of data feeds into a new form of data activism, which allows artists to globally stand up against unfair practices (Milan, 2017). In that situation, rather than replacing the physical with the virtual space, social media can help artists to take over the ownership of the physical public space again (Gerbaudo, 2012). Through the global interconnectedness and transparency facilitated by social media networks, artists can get empowered to uncover exploitative practices and stand up against them:

> If I do not get money for it but have a journey to get there, costs, and expense, and time then I need to say no. And it is not going to change except artists learn to say no. But nowadays, not many are capable of doing that [...]. Everybody needs to reflect on their own: Is this really worth it, that I renounce the money, and do I really want to support this kind of treatment of musicians? Or not? [...] If nobody accepts terrible gigs, then there will be no terrible gigs anymore. Except maybe three or four but then a big shitstorm would break loose, which I would find fair. (J. Schaffhauser, personal communication, April 8, 2018)

After this statement, the question arises, why not more of the respondents mentioned attempts to change the status quo actively. Referring back to the theoretical framework, a possible reason would be that the geographical boundlessness provided by these services

also leads to an inhibition of solidarity between workers and a feeling of disempowerment (Cockayne, 2016; Graham et al., 2017).

What became clear in these last chapter is that the findings of Gill and Pratt (2008) as well as Hesmondhalgh and Baker (2010) even got reinforced through the rise of subscription services: Artists find themselves in a constant discord between enjoyment and pressure, self-actualization, and self-exploitation, freedom and insecurity. Nonetheless, it also became evident that the labor of artists indeed is precarious. Artists do not have any assurance whether their long working hours are going to get compensated and are strongly dependent on networking for new chances of employment. Additionally, they have no chance for a neutral assessment of their skills, qualifications, and knowledge (Negus, 2014) and therefore suffer under the tremendous uncertainty accompanying this job. Their striving for and aiming at intangible values, which are typical for creative labor, let them spend a significant amount of time on immaterial labor, which is in turn only sparsely compensated (Baade, Fast, & Grenier, 2014). The situation of musicians, thereby, resembles the situation of many workers in neoliberal capitalism: "contingent, bearing downloaded economic risk, and exploited physically, emotionally and intellectually" (Baade et al., 2014, p.8).

5   Conclusion

This thesis aimed at finding out how labor changed for musicians with the rise of subscription services in the German music market. Thereby, the focal points lied on how these services impacted creative and non-creative processes as well as the intermediary network and the perceptions of musicians.

While searching for the answers to these points, one unexpected finding was made: The artists' notion about music shifted from it being a product to a marketing tool, which they utilize to promote their own brand. Hence, expectations of making money through record sales were put aside, and the self-commodification of artists was further facilitated through the rise of these platforms.

The provision of user data through subscription services influences the creative process, by now, only marginally. The main effects lie on the length of songs and the urge to catch the listener's attention right in the beginning. Further, the composition of live sets is influenced by the knowledge of which songs are the most popular. Even though Spotify and co. even more diminish the purpose of an album as a creative platform, the respondents are holding on to the concept as a way of expressing their creativity. These findings seem reassuring that artists still prioritize their creative freedom over monetary success. However, the question arises for how long this is going to be the case, as a successful presence on subscription services seems to become more and more critical. For example, through subscription services, the notion of genre seems to decrease as well but gets bit by bit replaced by musical filter bubbles, created through the algorithms of these services. To, in the future, fit into the adequate filter bubble, artists could feel the urge to adapt more strongly to what is expected from them. This finding uncovers that possible restrictions caused by genre are not abolished but rather superseded by new ones. The biggest problem in the creative process, however, is that it can never get schematized and is highly dependent on emotions and time. At the same time, creative work is not perceived as work from the outside world, leaving creative processes uncompensated.

Datafication, however, can be useful support for artists in their non-creative tasks. Especially smaller artists, which are dependent on efficient resource allocation, can plan, for example, their tours or the allocation of money to sponsored social media posts based on the insights derived from user data. However, those streaming platforms also catapult artists in

a financial dilemma: On the one hand, they feel pressured to be represented on these services, on the other hand, they need to give up the revenue which is typically made through record sales. As a compensation, almost every single respondent has a second foothold next to making music, and many regularly apply for funding. As an attempt to compensate for the missing revenue, artists further spend much time on marketing. For two respondents, a playlist promotion through Spotify led to a tremendous boost in streaming numbers and for one even to the contact with major labels. Getting picked by Spotify, however, is heavily dependent on luck and also rather possible for musicians that already have a certain reach. The shift in the notion about music led to facilitation of the self-commodification of artists, which urges them to become self-taught marketing professionals, to a greater or lesser extent. This expresses itself primarily in the expectations of fans that musicians are *always on*, in other words in a constant communication stream. It leaves them in a tight spot between protecting their privacy and ensuring the satisfaction of their fans.

In the past years, the intermediary network between artists and listeners was enlarged by a few new actors: the subscription services themselves, influential users on these services as well as other social media platforms and digital distributors. The latter actively add to the empowerment of artists by providing them with the possibility to distribute their music on all relevant digital platforms in exchange for a small fee. The relation to other, more traditional, intermediaries changed only slightly. Collecting societies seem to be appreciated even more, as the money made through royalties is one of the more stable revenue streams of artists. Further, artists seem to have unexclusive collaborations with labels more often. In a time where traditional CD sales decline more and more, artists can decide for themselves whether they want to leverage on the networks surrounding these labels or release their music on their own. Surprisingly, many DIY respondents expressed their wish for more intermediaries involved between them and their listeners to take over non-creative tasks in a professional manner.

The perceptions of artists regarding the contemporary music industry were, as expected, somewhat double-edged. Whereas some artists perceive subscription services as an excellent possibility for reach, others curse their existence. Further, again as predicted, artists find themselves in a constant discord between pleasure and uncertainty. Nonetheless, what almost all respondents expressed was the perception of a shrinking appreciation of their music. This spans from the low monetary appreciation they receive from subscription

services to the lower appreciation by customers, which got used to the access to fast amounts of songs. The handling of this situation differs: Some artists try to protect themselves by keeping an emotional distance to their music while others actively try to not accept the treatment by, for example, event organizers.

Summarizing it can be said that already after the digitalization a lot changed for artists, for better or for worse: Independent production and distribution, as well as a global reach, were simplified, but the need to spend more time on non-creative tasks got increased. The only advantages that recently accompanied the rise of subscription services are the limited possibility to get promoted through playlists and the datafication of listening behavior. The latter undoubtedly provides empowering insights but is not yet extensively utilized by especially smaller artists. The disadvantages coming with subscription services, such as the elimination of one significant revenue stream and the facilitation of precarity, therefore, weigh heavier. Subscription services indeed facilitated the exploitation of artists. Referring back to the first theoretical chapter and Richardson (2015) it can be seen that, in this case, the Sharing Economy is rather performing as a part of the capitalist economy than an alternative. Within the music industry, it reinforces isolation and separation and masks new forms of inequality and the polarization of ownership. Even though subscription services also provide artists with the ability to relatively easily increase their reach, the elimination of a crucial revenue stream truly enhanced the precarity of these workers. It further increased the need for other intermediaries in the market, as artists are not very capable of making themselves competitive against the increased competition without any professional help. Therefore, contradicting to Drahokoupil and Fabo's (2016) claim, that the impact of platformization on labor is only limited until now, it becomes clear that the platformization already impacted labor, at least in the music industry, tremendously.

However, after all, the shift in the notion about music led to an acceptance of many artists, that they cannot make money with their musical product. Through that most of the respondents did not even try, for example, alternative platforms for revenue generation. Nonetheless, artists need to stand up and collectively fight back, as the system is not going change by itself.

5.1   Implications

As the German philosopher, Theodor W. Adorno (1991), stated:

> The commercial character of culture causes the difference between culture and practical life to disappear. […] [T]hat moment of independence which philosophy specifically grasped under the idea of aesthetic resemblance is lost in the process. On all sides, the borderline between culture and empirical reality becomes more and more indistinct (p. 53).

Adorno's opinion towards subscription services and their big data collection and processing would probably be not hard to guess. He firmly believed in the immeasurability of culture and the decrease of its value when trying to do so (Prey, 2016). His opinion seems to be underpinned by the often-repeated claim during the interviews, that people rather spend money on coffee than on music. This directly points to an erosion of cultural values through subscription services. In the same time, those hinder musicians, on whose shoulders the whole industry is situated on, to make a living through their music. The need for an alternative way of employing this cultural segment becomes obvious. Maybe one should move away from the harsh criticism of the impact digitization has on labor and invest more into the definition of a best-practice future. Right now, it seems as if culture is getting shaped by technology, whereas we should let culture shape how we use technology and strategically decide how we want to capitalize on digitalization.

What is, firstly, needed for that is an improvement in transparency and education, which enables all the actors within the supply chain to comprehend settlements and revenue flow and which would ultimately also empower artists. One possibility to stand up against unjust treatments could be the active utilization of social media to bridge the global gap and form international labor movements. However, the outcome of such movements and protests may invoke minimal changes in settlements but does not change the stakeholder network within the whole industry straight away. Another chance could lie in the facilitation of a second technological disruption of the market. As the international DJ Gareth Emery said in an interview with Forbes:

> For me, the next evolution of the music industry is one where music is accessible and easy to get hold of, like it is now […] but at the same time, one where content creators are getting compensated for their work, not the intermediaries laying claim to most of the income. Let's not try and build on the infrastructure we currently have; it is not a stable platform to build on. Almost any attempt to modernize the music industry has failed due to the large number of stakeholders. (Rossow, 2018, para. 15)

The debate around the malfunctioning system of financing intellectual property was extended by a new topic, which proposes another possibility to empower artists: the blockchain and token economies (Rossow, 2018). Tokenization is "the process of converting intellectual property (e.g., rights to a song) into digital tokens with an underlying value" (Rossow, 2018, para. 11). In other words, through tokens, an artist can share a percentage of a song's rights and receive money from it. This process is achievable "through secure and transparent smart contracts that are built atop the blockchain" (Rossow, 2018, para. 11). Through the blockchain, artists can sell their music via a peer-to-peer system which facilitates the omission of traditional intermediaries. This strategy can also be used parallel to streaming and address big fans to crowdfund new projects of an artist. It helps artists to do business with their songs again, in which the song is simultaneously the payment system. Ultimately, this could lead to a new empowerment of artists.

A further possibility would be the implementation of a basic income. We know that the digitalization is going to lead to an elimination of a high number of jobs, which urges many people to reinvent themselves. For this, an existential security net is needed, which releases people from the need to fight for their survival (Lau, 2018). A basic income would help artists to even out their revenue stream and empower them not to take on every gig, no matter how low the salary is (de Peuter, 2011). Thereby, the basic income should not be "conceived as welfare support for those excluded from production but rather as a 'social salary' for those already participating in it" (de Peuter, 2011, p. 422). For the music industry, this could enable artists to create art without any pressure or need to finance their work. This would, conclusively, lead to a secure surrounding for musicians as well as an increase in the value of their artifacts.

5.2 Limitations

The research design of this thesis enabled a holistic answer to the presented research question and its subquestions. However, some limitations need to be pointed out.

The sample could be improved by also including more prominent artists or those exclusively signed under a record label when given the possibility. This and the enlargement of the sample could also enable a comparison between DIY artists and those entirely relying on intermediaries for future research.

Further, the quality of this research could be enriched by ensuring a greater diversity of the respondent sample. Women were, unfortunately, underrepresented, whereas people in

their twenties were overrepresented. The improvement of these points could lead to an enhancement of the generalizability of the results.

The interviewees, moreover, knew about the research purpose which could have subliminally influenced their answers into a direction they perceived as socially appropriate. Additionally, sensitive topics such as exploitation and anxiety were addressed. Even though the researcher tried to ensure a comfortable and trustworthy atmosphere, respondents may have obfuscated the truth due to uneasiness regarding specific themes.

Further, as part of the research design, the interviewer needed to analyze and interpret the answers of the interviewees. Even though the researcher tried to maintain an objective stance towards the results, a certain subjectivity might have subconsciously altered particular interpretations.

Nevertheless, this research project opened the door to a more comprehensive picture of the processes in the music market from the artist perspective. To truly understand the global impact this last disruption of the music industry brought with it, it is crucial to not only rely on surface data but to dig deeper. Through this in-depth analysis, it was possible to expose specific grievances in the market as well as the need for a second disruption, which lifts the weight of the whole industry from the shoulders of the artists.

5.3   Ideas for Future Research

As this thesis, as well as other, preceding research projects, already uncovered the unjust system of the music industry, it is time to shift from a retrospective to a strategic mindset. Academia can have a crucial influence in envisioning and implementing market changes towards a fairer system in which culture and its producers are valued again. Adding to the implications of the findings, therefore, a significant topic for future research would be how artists can capitalize on the blockchain to transform their music into a product again, including for example how they make themselves competitive.

However, taking a step back and looking at the limitations of this research project, future research could consider analyzing rising intermediary structures more in-depth, such as the collaboration of artists with freelance managers as a chance for a fairer business network.

Further, an in-depth analysis of best-practices of branding could help artists to successfully stand out from the crowd in the future. As recommendation systems will probably only

become more present and influential in the future, it would be interesting to unfold the potential ways of artists in which they make themselves competitive.

Upcoming research projects could also quantitatively analyze how the revenue streams of artists actually are composed. As the results of this thesis show, the alleged alternative revenue streams coming from gigs and merchandise (Tilson et al., 2013) are often harder to fight for as expected.

References

Adorno, T. W. (1991). *The culture industry. Selected essays on mass culture*. London: Routledge.

Arora, P., & Vermeylen, F. (2013a). Art markets. In R. Towse & C. Hanke (Eds.), *Handbook of the Digital Creative Economy Cultural Economics* (pp. 322–328). Cheltenham: Edward Elgar Publishing.

Arora, P., & Vermeylen, F. (2013b). The end of the art connoisseur? Experts and knowledge production in the visual arts in the digital age. *Information, Communication & Society*, *16*(2), 194–214. https://doi.org/10.1080/1369118X.2012.687392

Atasoy, O., & Morewedge, C. K. (2018). Digital goods are valued less than physical goods. *Journal of Consumer Research*, *44*(6), 1343–1357. https://doi.org/10.1093/jcr/ucx102

Baade, C., Fast, S., & Grenier, L. (2014). Introduction - musicians as workers: Sites of struggle and resistance. *MUSICultures*, *41*(1), 1–9.

Babbie, E. (2017). *The basics of social research* (7th ed.). Boston: Cengage Learning.

Baym, N. K. (2015). Connect with your audience! The relational labor of connection. *The Communication Review*, *18*(1), 14–22. https://doi.org/10.1080/10714421.2015.996401

Bhatt, S. (2017). *How digital communication technology shapes markets. Redefining competition, building cooperation.* Cham: Springer Nature. https://doi.org/10.1007/978-3-319-47250-8_1

Bockstedt, J. C., Kauffman, R. J., & Riggins, F. J. (2006). The move to artist-led on-line music distribution: A theory-based assessment and prospects for structural changes in the digital music market. *International Journal of Electronic Commerce*, *10*(3), 7–38. https://doi.org/10.2753/JEC1086-4415100301

Braun, V., & Clarke, V. (2006). Using thematic analysis in psychology. *Qualitative Research in Psychology*, *3*(2), 77–101. https://doi.org/10.1191/1478088706qp063oa

Bruns, A. (2016). Prosumption, produsage. In K. B. Jensen, R. T. Craig, J. D. Pooley, & E. W. Rothenbuhler (Eds.), *The International Encyclopedia of Communication Theory and Philosophy.* (pp. 1–5). John Wiley & Sons, Inc. https://doi.org/10.1002/9781118766804.wbiect086

Brunton, F., & Nissenbaum, H. (2013). Political and ethical perspectives on data obfuscation. In M. Hildebrandt & K. De Vries (Eds.), *Privacy, Due Process and the Computational Turn*

(pp. 164–188). Abingdon: Routledge.

Bundesverband Musikindustrie e.V. (2015). *Musikwirtschaft in Deutschland [Music industry in Germany]*. Retrieved from http://www.musikindustrie.de/fileadmin/piclib/presse/Dokumente_zum_Download/Musikwirtschaft_in_Deutschland_2015.pdf

Cave, A. (2016, October 18). Netflix versus Uber: Does the subscription or sharing economy have more potential? *Forbes*. Retrieved from https://www.forbes.com/sites/andrewcave/2016/10/18/netflix-versus-uber-does-the-subscription-or-sharing-economy-have-more-potential/

Chance The Rapper. (2017). I think artist can gain a lot from the streaming wars as long as they remain in control of their own product. *[Twitter Post]*. Retrieved from https://twitter.com/chancetherapper/status/842792599715037184

Chandler, D. (2017, May 18). All work and no pay: creative industries freelancers are exploited. *The Guardian*. Retrieved from https://www.theguardian.com/small-business-network/2017/may/18/all-work-and-no-pay-creative-industries-freelancers-are-exploited

Cheng, M. (2016). Sharing economy: A review and agenda for future research. *International Journal of Hospitality Management*, *57*, 60–70. https://doi.org/10.1016/J.IJHM.2016.06.003

Cockayne, D. G. (2016). Sharing and neoliberal discourse: The economic function of sharing in the digital on-demand economy. *Geoforum*, *77*, 73–82. Retrieved from https://kundoc.com/pdf-sharing-and-neoliberal-discourse-the-economic-function-of-sharing-in-the-digital.html

Daellenbach, K., Kusel, R., & Rod, M. (2015). The ties that bind? Online musicians and their fans. *Asia Pacific Journal of Marketing and Logistics*, *27*(2), 168–190. https://doi.org/https:// doi.org/10.1108/APJML-08-2013-0095

Das, S. (2017, February 12). The sharing economy creates a Dickensian world for workers. *Independent*. Retrieved from http://www.independent.co.uk/voices/sharing-economy-gig-economy-uber-airbnb-workers-rights-a7575856.html

David, G., & Cambre, C. (2016). Screened intimacies: Tinder and the swipe logic. *Social Media and Society*, *2*(2). https://doi.org/10.1177/2056305116641976

de Peuter, G. (2011). Creative economy and labor precarity. *Journal of Communication*

Inquiry, *35*(4), 417–425. https://doi.org/10.1177/0196859911416362

Deuze, M. (2016). Managing media workers. In G. Ferrell Lowe & C. Brown (Eds.), *Managing Media Firms and Industries. What's So Special About Media Management?* (pp. 329–342). Cham: Springer.

Dicola, P. (2009). Money from music: Survey evidence on musicians' revenue and lessons about copyright incentives. *Arizona Law Review*, *55*(13), 301–370. Retrieved from http://www.arizonalawreview.org/pdf/55-2/55arizlrev301.pdf

Die Künstlersozialkasse [The artist social fund]. (2018). Retrieved June 17, 2018, from http://www.kuenstlersozialkasse.de/die-ksk/die-kuenstlersozialkasse.html

Drahokoupil, J., & Fabo, B. (2016). The platform economy and the disruption of the employment relationship. *ETUI Policy Brief European Economic, Employment and Social Policy*, *5*, 2–5. Retrieved from http://www.etui.org/Publications2/Policy-Briefs/European-Economic-Employment-and-Social-Policy/Collective-labour-law-under-attack-how-anti-crisis-measures-dismantle-workers-collective-rights

Eddy, M. (2016, November 1). YouTube agrees to pay royalties, ending German music dispute. *The New York Times*. Retrieved from https://www.nytimes.com/2016/11/02/business/international/germany-music-royalties-youtube.html

Ellis-Petersen, H. (2017, April 25). How streaming saved the music: global industry revenues hit £12bn. *The Guardian*. Retrieved from https://www.theguardian.com/business/2017/apr/25/2016-marks-tipping-point-for-music-industry-with-revenues-of-15bn

Erlandsson, D., & Perez, J. (2017, November 2). Listening diversity increases nearly 40 percent on Spotify. *Spotify*. Retrieved from https://insights.spotify.com/de/2017/11/02/listening-diversity-spotify/

Fumagalli, A. (2015). Cognitive, relational (creative) labor and the precarious movement for "commonfare". "San Precario" and Euromayday. In G. Cocco & B. Szaniecki (Eds.), *Creative Capitalism, Multitudinous Creativity. Radicalities and Alterities.* (pp. 3–24). Lanham: Lexington Books. Retrieved from https://books.google.nl/books?hl=en&lr=&id=wEhOCgAAQBAJ&oi=fnd&pg=PA3&dq=creative+labor+and+exploitation&ots=TC0Al7ZyFW&sig=ouB3qkQLwbGfG-dAhNJ8oM-GtR4#v=onepage&q=creative labor and exploitation&f=false

Gerbaudo, P. (2012). *Tweets and the streets. Social media and contemporary activism*. New York: Palgrave Macmillan.

Gill, R., & Pratt, A. (2008). In the social factory? *Theory, Culture & Society*, *25*(7–8), 1–30. https://doi.org/10.1177/0263276408097794

Gillespie, T. (2010). The politics of "platforms." *New Media and Society*, *12*(3), 347–364. https://doi.org/10.1177/1461444809342738

Graham, M., Hjorth, I., & Lehdonvirta, V. (2017). Digital labour and development: impacts of global digital labour platforms and the gig economy on worker livelihoods. *Transfer (Bruss)*, *23*(2), 135–162. https://doi.org/10.1177/1024258916687250

Grundlagen [Basics]. (n.d.). Retrieved June 17, 2018, from http://www.musikindustrie.de/recht-politik/grundlagen/

Guba, E. G., & Lincoln, Y. S. (1994). Competing paradigms in qualitative research. In N. K. Denzin & Y. S. Lincoln (Eds.), *Handbook of qualitative research* (pp. 105–117). Thousand Oaks: Sage. https://doi.org/http://www.uncg.edu/hdf/facultystaff/Tudge/Guba%20&%20Lincoln%201994.pdf

Hamari, J., Sjöklint, M., & Ukkonen, A. (2016). The sharing economy: Why people participate in collaborative consumption. *Journal of the Association for Information Science and Technology*, *67*(9), 2045–2306. https://doi.org/10.1002/asi.23552

Helmond, A. (2015). The platformization of the web: Making web data platform ready. *Social Media and Society*, *1*(2), 1–11. https://doi.org/10.1177/2056305115603080

Hesmondhalgh, D., & Baker, S. (2010). "A very complicated version of freedom": Conditions and experiences of creative labour in three cultural industries. *Poetics*, *38*(1), 4–20. https://doi.org/10.1016/j.poetic.2009.10.001

Hracs, B. J. (2012). A creative industry in transition: The rise of digitally driven independent music production. *Growth and Change*, *43*(3), 442–461. https://doi.org/10.1111/j.1468-2257.2012.00593.x

Hracs, B. J. (2015). Cultural intermediaries in the digital age: The case of independent musicians and managers in Toronto. *Regional Studies*, *49*(3), 461–475. https://doi.org/10.1080/00343404.2012.750425

In popular music, collaborations rock. (2018, February 3). *The Economist*. Retrieved from https://www.economist.com/news/business/21736179-hip-hops-culture-teamwork-

brings-many-voices-studio-and-growth-music-streaming

International Federation of the Phonographic Industry. (2017). *Global music report 2017: Annual state of the industry*. Retrieved from http://www.ifpi.org/downloads/GMR2017.pdf

Jenkins, H., Ford, S., & Green, J. (2013). *Spreadable media: Creating value and meaning in a networked culture*. New York: New York University Press. Retrieved from https://books.google.nl/books?hl=en&lr=&id=yq84DwAAQBAJ&oi=fnd&pg=PP7&dq=sticky+factor+media+attention+economy&ots=C2hXPTS0Fb&sig=bCdEmzFoRZrlZM3fsP75a8ny_4w#v=onepage&q=sticky&f=false

Khamis, S., Ang, L., & Welling, R. (2017). Self branding micro celebrity and the rise of social media influencers. *Celebrity Studies*, *8*(2), 191–208. https://doi.org/10.1080/19392397.2016.1218292

Lange, B. (2016). The evolution of music tastemakers in the digital age. The rise of algorithms and the response of journalists. In B. J. Hracs, M. Seman, & T. E. Virani (Eds.), *The Production and Consumption of Music in the Digital Age* (pp. 237–247). New York: Routledge.

Lau, P. (2018). Eine kapitalistische Utopie [A capitalist utopia]. *Brand Eins*. Retrieved from https://www.brandeins.de/magazine/brand-eins-thema/innovation-2018/eine-kapitalistische-utopie#utm_source=LinkedIn&utm_medium=Link

Lee, K. (2018). Neoliberal marketization of global contemporary visual art worlds: Changes in valuations and the scope of local and global markets. In V. D. Alexander, S. Hägg, S. Häyrynen, & E. Sevänen (Eds.), *Art and the Challenge of Markets Volume 2. From Commodification of Art to Artistic Critiques of Capitalism.* (pp. 65–98). Cham: Springer Nature.

Leenders, M. A. A. M., Farrell, M. A., Zwaan, K., & ter Bogt, T. F. M. (2015). How are young music artists configuring their media and sales platforms in the digital age? *Journal of Marketing Management*, *31*(17–18), 1799–1817. https://doi.org/10.1080/0267257X.2015.1034158

Legard, R., Keegan, J., & Ward, K. (2003). In-depth interviews. In J. Richie & J. Lewis (Eds.), *Qualitative Research Practice* (pp. 139–168). London: Sage. Retrieved from http://www.scope.edu/Portals/0/progs/med/precoursereadings/IEIKeyReading5.pdf

Lepa, S., Hoklas, A. K., Egermann, H., & Weinzierl, S. (2015). Sound, materiality and

embodiment challenges for the concept of "musical expertise" in the age of digital mediatization. *Convergence*, *21*(3), 294–300. https://doi.org/10.1177/1354856515579837

Leung, L. (2015). Validity, reliability, and generalizability in qualitative research. *Journal of Family Medicine and Primary Care*, *4*(3), 324–327. https://doi.org/10.4103/2249-4863.161306

Luck, G. (2016). The psychology of streaming: exploring music listeners' motivations to favour access over ownership. *International Journal of Music Business Research*, *5*(2), 46–61. Retrieved from https://musicbusinessresearch.files.wordpress.com/2012/04/volume-5-no-2-october-2016-luck2.pdf

Marshall, L. (2015). 'Let's keep music special. F—Spotify': on-demand streaming and the controversy over artist royalties. *Creative Industries Journal*, *8*(2), 177–189. https://doi.org/10.1080/17510694.2015.1096618

Meier, L. M. (2014). Popular music making and promotional work inside the "new" music industry. In K. Oakley & J. O'Connor (Eds.), *The Routledge Companion to the Cultural Industries* (pp. 402–412). Retrieved from http://galuszka.uni.lodz.pl/old/2015-2015_letni_summer/Media Economics/reading 4.pdf

Milan, S. (2017). Data activism as the new frontier of media activism. In V. Pickard & G. Yang (Eds.), *Media activism in the digital age*. New York: Routledge.

Miller, Z. (2017, November 6). The top sites to crowdfund music. *The Balance*. Retrieved from https://www.thebalance.com/list-of-top-sites-to-crowdfund-music-985231

Morris, J. W., & Powers, D. (2015). Control, curation and musical experience in streaming music services. *Creative Industries Journal*, *8*(2), 106–122. https://doi.org/10.1080/17510694.2015.1090222

Musik als Wirtschaftsgut [Music as a commodity]. (n.d.). Retrieved June 17, 2018, from http://www.musikindustrie.de/recht-politik/musik-als-wirtschaftsgut/

Negus, K. (1998). Cultural production and the corporation: musical genres and the strategic management of creativity in the US recording industry. *Media, Culture & Society*, *20*(3), 359–379. Retrieved from http://journals.sagepub.com.eur.idm.oclc.org/doi/pdf/10.1177/016344398020003002

Negus, K. (2002). The work of cultural intermediaries and the enduring distance between

production and consumption. *Cultural Studies*, *16*(4), 501–515.

https://doi.org/10.1080/09502380210139089

Negus, K. (2014). Recordings, rights and risks: Intermediaries and the changing music

industries. *Civilisations: Revue Internationale D'Anthropologie et de Sciences Humaines*,

13, 113–136. Retrieved from http://research.gold.ac.uk/10742/1/Negus Recording%2C

Risk%2C Rights.pdf

Nguyen, G. D., Dejean, S., & Moreau, F. (2014). On the complementarity between online and

offline music consumption: the case of free streaming. *Journal of Cultural Economics*,

38, 315–330. https://doi.org/10.1007/s10824-013-9208-8

Nguyen, T. T., Hui, P.-M., Harper, F. M., Terveen, L., & Konstan, J. A. (2014). Exploring the

filter bubble. In *Proceedings of the 23rd international conference on World wide web -

WWW '14* (pp. 677–686). https://doi.org/10.1145/2566486.2568012

Pariser, E. (2011). *The filter bubble: What the internet is hiding from you [EPUB]*. New York:

The Penguin Press.

Peitz, D. (2018, April 3). Spotify: Wie man Erfolg bezahlt [Spotify: How to pay success]. *Zeit

Online*. Retrieved from http://www.zeit.de/kultur/musik/2018-03/spotify-

musikstreaming-dienst-boersengang-problem

Peoples, G. (2015, August 19). How "playola" is infiltrating streaming services: Pay for play is

"definitely happening." *Billboard*. Retrieved from

https://www.billboard.com/biz/articles/news/digital-and-mobile/6670477/how-

playola-is-infiltrating-streaming-services-pay-for

Phillips, A. (2017, March 17). Chance the Rapper explains how he's still independent, despite

Apple Music deal. *Pitchfork*. Retrieved from https://pitchfork.com/news/71701-chance-

the-rapper-explains-how-hes-still-independent-despite-apple-music-deal/

Pick, F., & Dreher, J. (2015). Sustaining hierarchy – Uber isn't sharing. *King's Review*.

Retrieved from

https://www.researchgate.net/profile/Julia_Dreher/publication/275889451_Sustaining

Hierarchy-_Uber_isn't_sharing/links/5552753908ae980ca606afbb.pdf

Poell, T., Duffy, B. E., Nieborg, D. B., Prey, R., & Cunningham, S. (2017). The platformization

of cultural production. In *Selected Papers of the 18th Annual Conference of the

Association of Internet Researchers*. Tartu. Retrieved from

http://www.gamespace.nl/content/AoIR2017-Platformization-of-Cultural-

Production.pdf

Prey, R. (2016). Musica analytica: The datafication of listening. In R. Nowak & A. Whelan
(Eds.), *Networked Music Cultures* (pp. 31–48). London: Palgrave Macmillan UK.
https://doi.org/10.1057/978-1-137-58290-4_3

Richardson, L. (2015). Performing the sharing economy. *Geoforum*, *67*, 121–129.
https://doi.org/10.1016/J.GEOFORUM.2015.11.004

Ritzer, G., & Jurgenson, N. (2010). Production, consumption, prosumption. *Journal of
Consumer Culture*, *10*(1), 13–36. https://doi.org/10.1177/1469540509354673

Robehmed, N. (2017, November 14). Yes, R&B sensation H.E.R. is Gabi Wilson. *Forbes*.
Retrieved from https://www.forbes.com/sites/natalierobehmed/2017/11/14/yes-rb-
sensation-h-e-r-is-gabi-wilson/#c2564661522b

Rossow, A. (2018, May 27). Blockchain aims to be the biggest stage for empowering music
artists. *Forbes*. Retrieved from
https://www.forbes.com/sites/andrewrossow/2018/05/27/blockchain-aims-to-be-the-
biggest-stage-for-empowering-music-artists/#4417a2623e0b

Salo, J., Lankinen, M., & Mäntymäki, M. (2013). The use of social media for artist marketing:
Music industry perspectives and consumer motivations. *International Journal on Media
Management*, *15*(1), 23–41. https://doi.org/10.1080/14241277.2012.755682

Schor, J. (2014, October). Debating the sharing economy. *Great Transition Initiative*.
Retrieved from
http://greattransition.org/images/GTI_publications/Schor_Debating_the_Sharing_Econ
omy.pdf

Schumacher, F., Klingner, S., & Gey, R. (2015). Administration vs. Kreativität -Eine empirische
Studie zur Situation der Musikindustrie in Deutschland [Administration vs. creativity -
an empirical study on the situation of the music industry in Germany]. In F. Schumacher
& S. Klingner (Eds.), *Metadaten in der Musikindustrie. Artefakte, Prozesse,
Lösungsansätze. [Metadata in the music industry. Artifacts, processes and solution
approaches]* (pp. 7–26). Leipzig: Institut für Angewandte Informatik e. V.

Schwarz, J. A. (2014). *Online file sharing : innovations in media consumption*. New York:
Routledge.

Shamsian, J. (2017, February 13). A 23-year-old rapper who refuses to sign a record deal just
made Grammy history. *Independent*. Retrieved from

http://www.independent.co.uk/life-style/chance-the-rapper-grammys-record-deal-a7578031.html

Sjöholm, J., & Pasquinelli, C. (2014). Artist brand building: towards a spatial perspective. *Arts Marketing: An International Journal*, *4*(1/2), 10–24. https://doi.org/https://doi.org/10.1108/AM-10-2013-0018

Sweney, M. (2017, April 15). Music industry goes to war with YouTube. *The Guardian*. Retrieved from https://www.theguardian.com/business/2017/apr/15/music-industry-youtube-video-streaming-royalties

Taylor, A. (2014). *The people's platform.Taking back power and culture in the digital age [EPUB]*. Toronto: Random House Canada.

Terranova, T. (2012). Attention, economy and the brain. *Culture Machine*, *13*, 1–19. Retrieved from http://culturemachine.net/index.php/cm/article/download/465/484

The 100 most influential people. (2017). Retrieved January 2, 2018, from http://time.com/collection/2017-time-100/4742682/chance-the-rapper/

Thompson, C. (2016, January). How the phonograph changed music forever. *Smithsonian Magazine*. Retrieved from https://www.smithsonianmag.com/arts-culture/phonograph-changed-music-forever-180957677/

Tilson, D., Sørensen, C., & Lyytinen, K. (2013). Platform complexity: Lessons from the music industry. In *Proceedings of the Annual Hawaii International Conference on System Sciences* (pp. 4625–4634). https://doi.org/10.1109/HICSS.2013.449

Tsuchiya, A. (2015, February 27). House of Cards: how Netflix's $100m gamble made them internet video kings. *The Guardian*. Retrieved from https://www.theguardian.com/media-network/media-network-blog/2015/feb/27/house-cards-netflix-internet-video-kings

Umsatz [Revenue]. (n.d.). Retrieved June 17, 2018, from http://www.musikindustrie.de/umsatz/

Verboord, M., & Noord, S. van. (2016). The online place of popular music: Exploring the impact of geography and social media on pop artists' mainstream media attention. *Popular Communication*, *14*(2), 59–72. https://doi.org/10.1080/15405702.2015.1019073

Whitler, K. A. (2016, January 17). How the subscription economy is disrupting the traditional business model. *Forbes*. Retrieved from

https://www.forbes.com/sites/kimberlywhitler/2016/01/17/a-new-business-trend-shifting-from-a-service-model-to-a-subscription-based-model/#248092764a5f

Wolk, A. (2015, July 20). Netflix and Spotify's digital deluge is eroding content's value. *The Guardian*. Retrieved from http://www.theguardian.com/media-network/2015/jul/20/netflix-spotify-streams-diminishing-value-digital-content

Woo, B. (2015). Erasing the lines between leisure and labor: Creative work in the comics world. *Spectator*, *35*(2), 57–64.

Appendix A: Description of Sample

Name of Interviewee	Artist Name/ Band Name	Independent / Signed / Non-Exclusive	Genre	Emerging/ Mid-Career/ Established	Skype / F2F	Date
Raphael Lott	Pane Mua	Independent, non-exclusive at several labels	Dubstep	Established	Skype	05.04.18
Timo Mitsch	VARS	Independent, non-exclusive at one label	Electronic	Emerging	Skype	05.04.18
Konstantin Koller	BASII; working on solo project	Independent	Indie-Pop; solo: electronic	Mid-career	Skype	05.04.18
Jonas Asiedu	Smuskind	Independent, non-exclusive at several labels	Drum and Bass	Mid-career	Skype	07.04.18
Manuel Scholze	Radiothérapie	Independent, non-exclusive at several labels	Techno	Established	Skype	08.04.18
Julien Schaffhauser	Julien Bride	Independent	Singer/ Songwriter	Mid-career	Skype	08.04.18
Christoph Stötzer	working on solo project; prior: Lyar	Independent, non-exclusive at several labels	Dance/ House/Electronic	Mid-career	Skype	09.04.18
Kira Linn	Linntett	Independent, release through labels	Jazz	Mid-career	Skype	10.04.18
Felix Margraf	Fex 52	Independent; own label	Hip Hop	Established	Skype	10.04.18
Tabea Luisa Booz	Tabea Luisa	Independent	Soul-Pop	Emerging	Skype	11.04.18
Mark Vonsin	ClockClock	Independent	Pop/House	Emerging	Skype	11.04.18
Hanna Sikasa	Club Flor de Maio	Independent, release through label	Afro-/ Brazil-Pop	Established	Skype	27.04.18
Felix Hirn	Aber Hallo	Independent, release through label	Pop/Rock	Established	Skype	28.04.18

Appendix B: Interview Guide

Note: The smaller written bullet points in italics can function as probes to dig deeper into certain topics.

Introduction

Questions	Purpose/Derivation of Question

• *Introduction of research project*
• *Asking for permission to tape the interview and assurance of confidentiality*
• *First, can you please tell me a bit about yourself and about your music?*
   o *Demographics*
   o *Type of music/genre*
   o *Period of time since starting music*
   o *Independent/signed (name of label)/any other collaboration*
   o *Music as full- or part-time job*
   o *Platforms on which music is offered on*
	Putting interviewee at ease and starting soft into conversation to enable comfortable surrounding

Creative Labor

Questions	Purpose/Derivation of Question

• *What is your creative process and how has it changed with all these new technologies?*
   o *Song writing, performing, rehearsing, artwork, graphic & website design, product development, merchandise design, videos, images, fashion, collaborations*
   o *inspiration for a new song*
	Revealing the whole scope of the creative process and tapping into impacts of subscriptions services that already come to the artists' minds (probes are based on (Hracs, 2012))

• *Do you use the data (demographics, listening statistics etc.) you get about your consumers through subscription services? If so, does this knowledge influence your creative process?*	Investigating whether artists rely on data for their creative production, as e.g. already common in the film- and television-business (Tsuchiya, 2015).
• *How does the knowledge that subscription services facilitate the decrease of the album influence you in your creative process?*	Finding out if knowledge about cherry-picking behavior of consumers (Poell et al., 2017) changes the way artists produce their music

• *How much does the belonging to a certain genre play a role in your creative process?*	Questioning the importance of and notions about genre in the age of music streaming, in which music is grouped by much more detailed characteristics (Prey, 2016).
• *If artist is signed: How much does your record label influence your creative process?*	Revealing if the second disruption again led to a decrease of label-power as it was the case after the first disruption (Hracs, 2012)
• *What would you estimate: What percentage of your time do you spend on the actual creative creation of your music?*	Revealing if the second disruption also led to a decrease of time spent on creative labor as it was the case after the first disruption (Hracs, 2012)

Non-creative labor

Questions	Purpose/Derivation of Question

• *Can you please describe the rather non-creative processes you face while working on your music?*
 	
   o *Business tasks: merchandising, financing, accounting, investor relations, PR & marketing, branding, networking*
 	
   o *Managerial tasks: legal (contract delegation & copyrights), booking, project management, licensing*
 	
   o *Technical tasks: instrument and equipment, recording (engineering, mastering) video editing, manufacturing/packaging, distribution, website maintenance, acquiring and maintaining technical knowledge*
	Revealing the whole scope of the non-creative process (probes are based on (Hracs, 2012))

• *What is your main way of creating revenue through your music?*
 	
   o *If income rather low: What are the main ways to compensate a relatively low income?*
 	
   o *One other respondent said, that he did not make a difference between Spotify and SoundCloud, as it is not possible to make revenue out of your music anymore. Instead, he said, one should use these platforms to gain*
	Uncovering if live performances and merchandising are really the most used alternative streams of revenue (Tilson et al., 2013).

reach and then see whether one can earn money with merchandise or gigs. What do you think about that?	
• *Which platforms, digital or not, do you use to sell your music?* o *E.g. brick-and-mortar sales (old-school trend), traditional download platforms (iTunes etc.), subscription services (Spotify etc.), alternative platforms (e.g. Topspin, Bandcamp, Patreon etc.)*	Showing which kind of artists also spend money and time on traditional brick-and-mortar sales. Further, the alleged revenue stream through alternative platforms (Miller, 2017) gets questioned.
• *Which platforms, digital or not, do you use to promote your music?* o *Traditional channels (TV, Radio etc.) or Social Media (FB, Youtube, Instagram, forums, blogs, apps, widgets etc.)*	Uncovering the scope of artists' participation in branding and if they solely rely on digital platforms or also have access to traditional media (Leenders et al., 2015).
• *How do you make sure to get noticed by consumers on these subscription services?* o *E.g. playlist promotion*	Disclosing whether artists were promoted through playlists and if they actively try to enforce playlist promotion (Peoples, 2015).
• *Do you also offer your music for free as incentives on certain platforms?*	Exposing practices of unpaid labor, e.g. through prosumption (Bruns, 2016) on services such as SoundCloud.
• *What would you estimate: What percentage of your time do you spend on these rather non-creative tasks?*	Revealing if the second disruption also led to an increase of time spent on non-creative labor as it was the case after the first disruption (Hracs, 2012)

Intermediaries

Questions	Purpose/Derivation of Question

• *Which are the organizations that you engage with to put your music out there?*
   o *Labels, music producers, recording studios, phonogram vendors, pressing facilities, stationary & online commerce*
   o *Digital aggregators and subscription services*
   o *Publishers*
	Displaying how market structure (introduced in chapter 2.4) applies from the artist perspective and as how important artists perceive certain intermediaries. This also uncovers if the role of some intermediaries truly changed.

o *Concert organizers, guest performance directorates, artist agencies, tour and ticket service providers, operators (clubs, event halls, etc.)* o *Collecting societies (GEMA, GVL etc.)* o *Marketing platforms (Facebook promotion etc.)*	
• *Is this the game you need to play? Do you work with these organizations because it is your choice?*	Showing whether newly emerged actors are perceived with thankfulness or as competing actors that claim their revenue share and facilitate exploitation (Schumacher et al., 2015). It further shows whether artists work voluntarily with these intermediaries or are forced to.
• *Do you think that these changes had an influence on your relationship with your listeners? Has it created more distance, or has it brought you closer to your listeners?*	Again, tapping into the perceptions artists have towards those intermediaries and whether they perceive them as an enabler for closer contact or as an interfering factor.

Perceptions

Questions	Purpose/Derivation of Question
• *Do you think your music is valued enough?* o *Fair compensation to work load*	Revealing whether artists feel as they are compensated fairly for their work and experience a certain appreciation towards their music.
• *Do you feel satisfied with your work? What makes you happy or unhappy?* o *Satisfaction/pleasure vs. instability* o *In-charge vs. anxious* o *Do you feel exploited in that industry?*	Proving the high ambivalence of cultural workers in their perceptions (Hesmondhalgh & Baker, 2010) for the contemporary music market.
• *Do you feel exploited because you put too much energy, money or time in it?*	Displaying practices of self-exploitation, which were found to be a strong issue especially for young people and facilitated through feelings of enjoyment

	and pleasure (Hesmondhalgh & Baker, 2010).
• *Do you think you will stick with it? And why or why not?*	Again, revealing subconscious tendencies towards satisfaction and dissatisfaction.

Appendix C: Interview Coding – Theme List and Exemplary Codes

Subquestion	Theme	Exemplary Codes
Unexpected, overarching finding	New Perception of Music	Music as marketing tool
		No revenue through music distribution possible
SQ1 Creative labor	Limited influence of datafication on creative labor	Reluctance towards adapting creative process to user data
		Influence on catchy style in the beginning of songs
	Persistent influence of traditional middlemen on creative labor	high influence of label in creative process
		creative adjustments because of potential label affiliation
	Little time available for extensive and unpredictable creative process	Need for experimental creative time
		Little time spent on creative processes
		Creative process not perceived as work by externals
	Holding on to the album	Album functions as business card
		Album as protest against playlist hype
	Devaluation of genre	Difficulties defining own genre
		Breakout of genre distributed on alternative platforms
SQ1 Non-creative labor	Empowering influence of datafication on non-creative labor	Usage of user data for hashtag optimization
		Usage of user data for more efficient tour bookings
	Financial dilemma	Subscription services as enabler for cheap distribution
		Subscription services hindering revenue stream through music
		Subscription services facilitating devaluation of culture
	Increased need for promotion	Spotify playlist promotion facilitated success
		Instrumentalization of social media to influence subscription services

		Constant connection with fan-base through social media
SQ2 Intermediaries	Networking as crux of the matter	Enjoyment of networking
		Networking with influencers to increase reach
	New Intermediaries	Digital distributors
		Influential users of subscription services
	Old Intermediaries with new influence	Labels
		Collecting societies
	Double-edged opinion regarding intermediaries	Wish for a bigger professional intermediary network
		Every intermediary just one actor more getting share of revenue
SQ3 Perceptions	Double-edged opinions regarding subscription services	Anger towards Spotify and its disruptive forces
		Spotify as enabler for bigger reach
	Dissatisfaction	Low appreciation perceived
		Lack of control
		Self-exploitation
	Satisfaction	Enjoyment of freedom
		Pursuing own passion
	Double-edged strategies to handle influence of subscription services	Keeping emotional distance to avoid disappointments
		Active rejection of the status quo