THE POWER OF DIGITALISATION IN THE

MUSIC AND LIVE PERFORMANCE INDUSTRY

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ABSTRACT

This thesis examines the ways in which digitalisation, specifically file sharing and the use of streaming services, have affected the music industry. More precisely, it studies the impact said digitalisation has had on the live music industry and confirms its increased demand. The key digital innovation moments from the past two decades have been reviewed, in addition to academic articles that have studied the effects of file sharing on recorded music sales. After establishing a supported academic background, which confirms a decrease in recorded music and an increase in live music performances, a theoretical framework has been formulated. This framework has primarily been based on the theory of experience economy, proposed by Joseph Pine and James Gilmore. Additionally, views from the authors of *The Digital Evolution of Live Music*, Angela Jones and Rebecca Bennet have been incorporated, as well as thoughts from Jean Baudrillard's theory of hyperrealism. Furthermore, visual and film analysis have been applied to video recordings of live performances from a concert context and a festival context. British bands Coldplay and Oasis are studied in the concert context analysis, while Glastonbury is the prominent focus for the festival context. The analysis reveals that improvements have been made in live performances in recent years, mainly in terms of audience engagement, light shows which result in higher theatrical performances, and the design of the overall experience. I conclude that live performances today display a more theatrical performance than twenty years ago and that this is possibly a direct consequence of digital innovations.

KEYWORDS

File Sharing, Napster, Streaming Services, Live Performances, Experience Economy.

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Introduction

During the early 1960s, digitalisation began to have a significant impact on a number of different industries. It wasn't until the early 1980s however, that it began to affect the cultural and creative industries (Hesmondalgh 378). David Hesmondalgh, author and professor of media, music and culture at Leeds University, declared in his book *The Cultural Industries,* that digitalisation could never "be a minor part about change and continuity in the cultural industries" (376). Hesmondalgh considers digitalisation to be one of the biggest debates when it comes to cultural production (376). However, he advices to use the notion carefully and soberly, as often "many parties have an interest in overstating the impact of new communication technologies" (376). The music industry wasn't one to remain unscathed. Digitalisation made it possible to produce larger amounts of music and forgo lower costs (Hesmondalgh 379). Additionally, digitalisation has aided the vast distribution of cultural content and with new technologies facilitating the free share of files, it radicalised the music industry business. Using this viewpoint seems adequate when analysing the influences of digitalisation in respect to the music industry and the way we view it today.

There exists a serious concern that the music industry is headed for a collapse due to the digitalisation of music (Naveed 1). Similarly, digitalisation is threatening other creative industries such as printed media, including newspapers and book publishing.

But what is digitalisation? First, it is important to clarify the difference between the notions of digitalisation and digitalisation. There is often a level of confusion between these concepts, which many times are used interchangeably, according to an article written for Forbes Magazine (Bloomberg). Digitisation is "taking analogue information and encoding it" in order for computers to use it (Bloomberg). However, digitalisation refers to the process in which this digitisation takes place, according to Gartner's Glossary of Information

Technology. Therefore, during this work, I will primarily use the notion of digitalisation. In order to understand how said technology processes have influenced the music industry, an observation over time has to be made. In other words, the process of technological developments, changes and innovations are some key interests at hand.

These technological developments are transforming cultural production and consumption according to Professor of Cultural Science, John Hartley in his book *Key Concepts in Creative Industries*. In fact, he states that, "mobile devices and platforms such as the iPod, iPhone (smartphone), iPad (tablet) and iTunes have dramatically transformed the music industry by changing how music is made, distributed and consumed, indicating that technologies can radically reshape media industries" (157). Therefore, an understanding of technology and digitalisation is essential in developing and redesigning business models not only in the music industry but in the creative industries as a whole.

Multiple scholars and professionals within the music industry will agree that digitalisation has been one of the main contributors in how the music industry has transformed into what we see today. The developments of music distribution and digital channels have given marketers the need to rethink business models (Wlömert). With the birth of digital platforms such as Napster, YouTube and Spotify, among others, accessibility to music has never been easier. This digitalisation has resulted in a transformation of the music industry as a whole, ipso facto, affecting the artist's economic revenues, while at the same time deriving multiple other consequences. In this thesis I intend to better understand how some of these digital developments, specifically those regarding file sharing and streaming services, have influenced the music industry as well as their effects on live performances.

Patrik Wikström, expert in creative industry developments, states that towards the end of the twentieth century, record sales were at an all-time high (9). However, with the

emergence of file sharing in 1999, concretely the launch of Napster by Shawn Fanning, recorded music sales began to decrease (Hong 1). This has resulted in a switch when it comes to the business model traditionally used in the music industry. Multiple other scholars have been making similar statements for the past decade, as it proves to be one of the main consequences of digitalisation and the commercialisation of the Internet when it comes to talking about the music industry.

Some of the key developments that are worth mentioning for this thesis from the past two decades include Napster, LimeWire, iTunes & iPod, YouTube, SoundCloud, Deezer, Spotify and Apple Music. As can be noticed above, this study intends to explain how these key moments have influenced the music industry, specifically the live music performance industry.

Furthermore, an article by Mortimer et al. analysed the impact file sharing had on recorded music sales and the connection this has to an increased demand of live performances (3). The results found were similar to those mentioned by Patrik Wikström in his chapter "The Music Industry in an Age of Digital Distribution" mentioned above. A similar study conducted by Naveed et al. also resulted in a noticeably increased demand for live performances (14). However, the latter also examined the role of streaming services, and not just peer-to-peer file sharing. It is these views that will be expanded during this research.

Research Questions

Given the information stated above, I decided to focus this paper, which is my master thesis for the program Master of Arts and Culture with a specialisation in Creative Industries, on answering the question: "In what ways has digitalisation, specifically file sharing and streaming services, influenced the live music performance industry from 1995 until now?".

Firstly, it is important to understand what is meant by 'live music performance industry'. When talking about live music performances during this study, I refer primarily to festivals, small gigs and large concerts. Also, I discuss mainly Western live music performances, not limiting the research to one continent, but noticing similarities mainly between Europe and the United States. However, the theories discussed during this research could be applied to any geographical area as the changes and innovations mentioned are global.

In order to answer the main research question, it is necessary to answer the following sub-questions:

1. "How are live music performances different today as opposed to twenty years ago?"

2. "What kinds of digitalisation have happened in the last 2 decades within the music industry?"

3. "How have these key developments contributed to the changes in live performances in the last two decades?".

Methodology

This thesis primarily builds on existing knowledge, both academic and professional. With the purpose of answering the three sub-questions stated above, and eventually providing an answer to my main research question, I focus my study primarily on qualitative research, although a small part of this paper does feature quantitative research in the form of a survey. This survey was shared with friends and family, mostly via social media and received a total of 70 participants. The questions asked are both open and close-ended and can be found in appendix A at the end of this paper.

Qualitative research is known for its interpretive manner, allowing me to make use of both objective and subjective data for contextualisation and understanding. Therefore, a meta-analysis of literature readily available is analysed. More specifically, articles and texts written by both academics and professionals, who could be considered experts in the field of cultural studies, digitalisation and the music industry have been examined. These texts cover statistical results as well as critical reflections. The use of non-academic texts is due to the recency of this topic. The key moments of digital innovation during the last twenty years, which have shaped the music industry as we see it today, are also pointed out for clarification and structure. This research also builds on personal experiences, as I myself, experienced and used many of the innovations discussed first hand. This exploration makes use of the case study as a research method. The literature reviewed forms a theoretical and historical framework which serves as a lens through which the case studies will be analysed. By analysing the theory of Experience Economy by Joseph Pine and James Gilmore, as well as discussions from Angela Jones and Rebecca Bennet, I can better understand the demand for live music performances.

Additionally, by considering the evolution of digitalisation in the music industry, specifically in regard to file sharing services and on-demand streaming services, I can further appreciate the connection between digitalisation and the increase of live music performances. After reviewing the literature and theories available, I chose to first analyse the British band Coldplay. Video recordings of their live performances uploaded to YouTube were evaluated. Then, a similar analysis was carried out with live performances from another British band, Oasis. These evaluations allowed for certain conclusions to be made in the context of live concerts. To make this analysis more complete, Glastonbury Festival, a contemporary performing arts festival held almost yearly in the United Kingdom, was considered.

Glastonbury began in 1970 and therefore proves to me an interesting case study for this thesis as due to their large lifespan, it is possible to observe if any changes have occurred in terms of their live music performances over the years, specifically in the digital era.

Starting this thesis, I speculated that live performances in the late 1990s were much less dramatic and theatrical than those of the recent years, especially when it comes to world-wide known artists. I expected to observe significant changes in live concert and festival performances as not only are live music experiences becoming more popular, but technology is continuously innovating and replacing traditional practices. I anticipated that audiences would be larger due to the increased popularity and more theatrical conditions would be observed. By theatrical conditions, I refer to light shows, fireworks and even the possibility of floating above the stage as if one was a drone, a practice that was carried out by Lady Gaga in 2013. By analysing the case studies mentioned above, I am now able to confirm or disprove my predictions.

Additionally, I hoped to conduct in-depth interviews with professionals in the field, such as record labels, artists, artist managers and/or music publishers. However, these interviews were not completed. Ideally, the individuals interviewed would have worked in the music industry for ten or more years as the timing is an important factor on how they have noticed change within the industry. Despite not interviewing these professionals, this thesis provides ample conclusions in regard to digitalisation and the live music industry. Interviews with records labels, artists and managers could provide an interesting addition to this research. Therefore, I recommended future research on this topic to include said analysis.

Thesis Structure

This research begins with a descriptive explanation of digitalisation within the music industry. The first chapter explores what kinds of digitalisation have occurred in the music industry since 1995. It includes phenomena such as peer-to-peer file sharing and access-based services, commonly known as streaming services. Additionally, it reviews the key digital moments that have contributed to today's music scene, briefly explaining them in chronological order.

Following this, in the second chapter, a literature review is studied as multiple articles are reviewed to further understand the consequences of the key digital moments mentioned in the previous chapter, additionally proving and confirming a substantial decrease in recorded music sales as well as an increase in live music performances. This chapter also contains the analysed results of a survey which was conducted to find out if individuals are aware of artist revenues through streaming services and whether or not they agree with the subscription fees.

The third chapter lays out a theoretical framework which serves as a basis from which I will approach my case study analysis. This includes theories such as the experience economy and hyperrealism. The final chapter, number 4, is dedicated to the more practical part of this research, specifically focusing on the case studies explained in the methodology section above, including a brief explanation of why visual film analysis is key to understanding these case studies. This thesis ends with a general overall conclusion, which includes a short summary of my findings as well as discussions and considerations made along the way. The conclusion also considers the challenges and limitations to this study and my personal recommendations for further research in this field.

1. Digitalisation in the Music Industry: Background Research

The music industry, like any other, has its complexities. It is not possible to talk about the music industry without first compartmentalising it. Paul Rutter, author of *The Music Handbook*, professor, consultant to music education and internationally published songwriter, created a simple visual map of the music industry and its parts (figure 1.1). He divides music performances and music creativity in two different sections; the recorded music industry sector and the live music industry sector. The first includes recorded music ventures and music companies. The second, on which I will focus much of this research, includes music performances and venues, as well as gigs, concerts and festivals (Rutter 8).
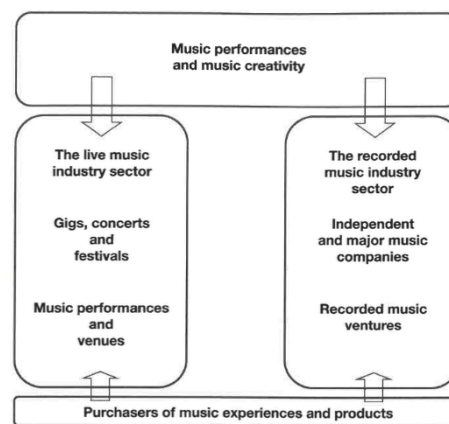
Fig. 1.1. Map of the music industry, Rutter, 2016.

The music industry as we see it today has undergone massive changes in the past few decades, affecting both the live music industry as well as the recorded music industry. The live music industry, as its very name states, is the sector in the music industry that focuses on live performances, be it in the form of festivals, gigs or concerts.

Initially, musicians relied on live performance incomes to sustain themselves. With the rise of recording possibilities and technologies, artists began making singles and albums. This eventually became their primary source of income (El Gamal 6). A musician would record his or her music which was intended for sale, hopefully of a large number of copies.

They would then advertise and promote their recorded albums with live music performances. Fast forward to the twenty-first century, and this traditional way of making a living through music production has completely reversed itself. With the rise of digital distribution, artists now rely on live performances as their main source of income, with their recorded songs acting as concert and tour promotion.

It has been stated by multiple scholars and professionals that over the last ten to twenty years there has been a noticeable increase in live music performances. At the same time, the recorded music industry sector has suffered a decrease in sales. To better understand this change, one has to look right back to 1995, coinciding with the commercialisation of the Internet and the first years with MP3 formatted files. The traditional music industry business model saw the individual purchase a physical copy of a song, be it in the form of tape, vinyl or CDs (Wlömert). Shortly after the digital distribution phenomenon, people started to massively consume music without paying for it. There are a number of digital developments that are key to understanding the music industry today and the loss of the traditional business model.

This chapter focuses on briefly explaining these developments in a simple manner as well as chronologically. Below, the key moments have been grouped into three main categories; early file sharing platforms, media players or libraries, and accessed based or on-demand streaming services. A visual representation of this timeline can also be observed in figure 1.2 on the next page, covering a period of 22 years, from 1993 to 2015. Although this research mainly focuses on two decades, between the years 1999 and 2019, there are a number of developments worth mentioning before 1999 for clarification.

Fig. 1.2. Visual timeline of digital developments.

1.1. Early File Sharing Platforms

As its name suggests, P2P or peer-to-peer file sharing is a way of transferring files through the Internet from one person to another. Essentially, this brings to light the possibility of computer hardware and software to communicate without a server (Mitchell). This allows for the free distribution of copyright-protected and non-protected digital media, whether it be music, movies, book or any other media that would normally be purchased. In this form of file sharing, there is a sender or host, also known as a seed (se), and a receiver or downloader, also known as a leech (le). It became common knowledge that in order to download a file from these P2P networks, the user would opt for those with a higher number of seeds, leading to a higher chance of a higher quality download (figure 1.3). Fundamentally, digital file sharing processes were the first sign of the dematerialising prospect that would later transform the music industry.

Fig. 1.3. Example of a file sharing platform. Se = seed. Le = leech.

1.1.1. Internet Underground Music Archive (1993)

Although not an actual file sharing platform, the creation of the Internet Underground Music Archive is a key moment to take into consideration in order to further understand the evolution of music digitalisation. The IUMA was developed in 1993 by three students and acted as a free database of songs made by unknown artists (Moreau). It was a pioneer of online music and could very well be one of the first moments that have inspired the transformation the industry has suffered over the last twenty years.

1.1.2. NAPSTER (1999)

In 1999 two brothers, Shawn and John Fanning sensationalised peer-to-peer file sharing networks with the launch of Napster. Due to its design, it was the optimal network for sharing music in MP3 format (Harris). It was also the first platform that allowed participants to share files without knowing each other.

However, although Napster proved to be an incredibly popular platform, it did not comply with copyright regulations. One of the most popular features of the network was the accessibility to a wide range of music without paying anything. Of course, this proved damaging to music professionals who spend billions on creating music content. Although not directly incriminating themselves, they did facilitate the exchange of copyright protected files and under US law "third parties can be held indirectly liable for copyright infringements under two legal doctrines: contributory . . . and vicarious liability" (Klumpp). This eventually led to the network being discontinued in July 2001 (Tiwari).

Nevertheless, Napster was later reborn in 2002 when PressPlay purchased Napster's technology and brand name. Taking advantage of the network's popularity, PressPlay renamed their new merger Napster 2.0. However, Napster 2.0 then underwent further changes

until finally in 2001, a paid streaming-like service called Rhapsody acquired the network. The Napster name was dropped until 2016, when Rhapsody rebranded. Today, Napster has adapted to its competition and become a music-on-demand service (Harris).

1.1.3. LimeWire & 'Friends' (2000)

It wasn't long until Napster faced competitors. In the year 2000, LimeWire was launched, allowing users to share and download files from the Internet through a free software programme. It considers itself the "world's most popular and most downloaded, free peer-to-peer file-sharing programme" ("LimeWire Free Download"). It worked in similar ways to Napster.

Additionally, numerous similar platforms were released in the first years of the twenty-first century, many of which with a very short life span. Some worth mentioning are Scour Exchange, Gnutella, eDonkey, BitTorrent, eMule and The Pirate Bay, as they became some of the most common among millennials.

Before moving to the category of streaming services, it is important to reiterate some of the legal issues involving file sharing platforms. File sharing platforms are made up of clients and protocols. To better understand this, I will take LimeWire as an example.

LimeWire is a software platform that was created and falls under the category of 'client'. For this client to work as a file sharing network, it uses a peer-to-peer 'protocol', in this case is Gnutetlla and BitTorrent. These clients and protocols are all part of legal software as by themselves they are not committing a crime but simply providing a way of sharing, and file sharing is a legal practice, at least in the United States. However, Computer Hope explains that the practice of file sharing only becomes illegal when the content shared is copyrighted ("Is file sharing or torrents illegal or legal?"). Nonetheless, there are ways of

using file sharing services in a perfectly legal manner by ensuring that the host or seed is

offering content to which he or she has the sharing rights.

1.2. Media Players or Media Libraries

In 1998 the first MP3 player was released in South Korea, known as the MPMan and

in the first year, sold over fifty-thousand players around the world (Adner). With the

possibility of downloading music for free, they became incredibly popular at the turn of the

century. In order to transfer digital music files to an MP3 player device, some people often

opted for media player software such as Windows Media Player. Another popular media

player was, and still is, iTunes.

1.2.1. iTunes & iPod (2001)

iTunes was released by Apple in 2001, along with their very own media playing

device, the iPod. iTunes originally only provided users with the chance to copy CDs and play

MP3 songs (Costello). It acted as a music library for users of the iPod to keep all their songs

in one place. However, it soon got up to speed and although previously downloaded or shared

digital files could be transferred to the iTunes service, the software did not actively encourage

this.

The iPod, and essentially any other small media player device, known usually as an

MP3 player, provided the consumer with a practical way of carrying their entire music

collection. Before these digital music innovations, people were stuck with carrying an

expensive portable CD player, along with their numerous CDs (Costello). Sam Costello,

business analyst and writer for *Lifewire*, made a statement that, "before the iPod, music

wasn't everywhere. Now, all entertainment is portable". Equal statements have been made by

Anahid Kassabian, author of *Ubiquitous Listening.* She writes that a day without music is very unlikely as in this day and age, music is everywhere (18).

1.2.2. iTunes Store (2003)

Apple saw an opportunity in the failing P2P downloading sites and launched the iTunes Store. They provided the user with a vast library of music to which they had certain rights. This allowed for iTunes to offer users the possibility of purchasing songs or albums for a fraction of the price of the physical copy in stores, offering record companies the chance to recover from displaced sales of previous years. It came at a perfect time, as users were torn between downloading music illegally from new sites or paying premium subscriptions and soon Apple would transform the music world in regard to music distribution. So much so that in only eight years iTunes became the world's largest music retailer (Costello). This year however, Apple has decided to integrate iTunes in their Music App, a service which is discussed further in this chapter.

1.3. Streaming Services

Over the past ten years, the music industry has continued developing its digital channels, which has led to the rise of on-demand streaming services. These services give the user access to what may seem like an unlimited amount of video or music content (De Looper). Said content is offered either for free, with the presence of advertisements or as part of periodic subscription fee. This thesis focuses primarily on music streaming services.

1.3.1. YouTube (2005)

Founded in 2005 by Chad Hurley, Steve Chen and Jawed Karim, this platform was designed to eliminate the barriers of sharing video media (Burgess 1). YouTube is an online platform and allows users to upload and view videos. Although not a musical streaming service in the same way as Spotify or Apple Music, YouTube has undoubfully contributed to today's music scene. In 2017, the Recording Industry Association of America named YouTube the "world's biggest on-demand music service, with more than 1.5 billion logged-in monthly users". YouTube is simply another provider for musical content and although legal, it does jeopardise musician income as it has the ability of offering the user millions of songs while possibly avoiding paying music creators fairly.

1.3.2. Deezer (2007)

As one of the first streaming services, it offers its users the possibility of listening to over 35 million songs while having an internet connection. Founded in France, it mainly receives national users, despite its international strategy (Watson, Deezer). By collaborating with music record companies in legal distribution, the streaming platform provides the user with millions of songs for free, with the use of advertisements as income. However, in 2009 it offered a paid subscription service as a way for the consumer to avoid said advertisements. Deezer recently reached over seven million subscribers (Watson, Deezer).

1.3.3. Spotify (2008)

Daniel Ek is CEO and founder of the Swedish streaming service known as Spotify. While sharing many similarities with its competitor Deezer, Spotify has managed to drive the digital distribution transformation forward and currently has over 113 million subscribers

worldwide, increased from 52 million in under three years (Watson, Spotify). Although the

platform was developed in 2006, it wasn't officially launched until 2008, according to an

article published by BBC News in 2018 ("How Spotify Came to be Worth Billions"). The

reason for this delay in launching laid mainly in the negotiation and discussion procedure

with record companies (Wikstrom 16). Although Deezer eventually offered paid

subscriptions, Spotify beat them in the race as they offered the same possibility from the very

beginning (Wikstrom 16). Spotify is a great example of how with patience and proper

negotiations, an innovative idea can succeed.

1.3.4. Apple Music (2015)

Apple Music has officially become one of Spotify's main competitors, and the latest

innovative platform to take the reins in digital music distribution. It was launched on the

iPhone, the world's most popular smartphone, as part of the built-in music app. The service

already existed under the name Beats Music which was purchased by Apple in 2014.

According to some, Apple did not create their own platform from scratch as they wanted a

quick method to reach the streaming market, which at the time was dominated by Spotify

(Coffey 16). With already having a milestone under their belt with the creation of the iTunes

Store, Apple has quickly taken up a large space in the music distribution industry. Currently,

they are planning on merging iTunes and Apple Music into one. As mentioned, Apple Music

is already a part of the music app within the Apple products. This means that the consumer

can store all of their pre-owned recordings, newly purchased albums from iTunes and have

access to a vast library of music through streaming in one place. This is a practicality no other

streaming service has managed yet.

1.4. Conclusion Chapter 1

This chapter had the intent of answering the sub-question "What kinds of digitalisation have happened in the last two decades within the music industry?". The answer to this question will contribute to answering my main research question later in this research.

There is no question that the turn of the millennium brought with it technological changes that would revolutionise the way we consume music. The music industry has undergone a meaningful transformation in regard to distribution. This first chapter has discussed the separation between the live music performance industry and the recorded music performance industry. It touches up on the discussion that many scholars and professionals within digitalisation and the music industry have joined: the radical shift in the business model used in the music industry. We have moved on from the traditional model, in which artists relied on the sales of their recorded music as their main source of income, with the use of live performances intended for the promotion of their latest recordings. Now, the business model has reversed, leaving the artist dependent on live music performances as a source of income, instead of the sale of records. This is due primarily to the process of digitalisation that music distribution has encountered.

It has also briefly explained the key innovation points that have occurred and developed over the past twenty years. Beginning with the early file sharing platforms Napster and LimeWire, then moving to the first media libraries and players such as iTunes and the iTunes Store. Lastly, the most recent digital distribution movement, known as on-demand streaming services, has been introduced and explained. This included an overview of YouTube, Deezer, Spotify and Apple Music.

After gaining a basic knowledge of the key digital developments and kinds of digitalisation that have occurred over the last two decades, I can now move on to analysing in

depth the impact these digital advances have had on the music industry and the way we consume music. To carry out this analysis, I will move on from non-formal sources used in the first chapter and take a more academic approach by studying scholarly texts.

2. Consequences of Digitalisation

The following chapter focuses on how the main digital developments discussed in the previous chapter have impacted the music industry as we live it today. It intends to answer the sub-question "How have these key developments contributed to the changes in live performances in the last two decades?".

As mentioned, music distribution experienced a shift around the turn of the millennium when content became digitalised. This shift, some will argue, is a representation of disruptive innovation. In this chapter, I intend to confirm said statement. Disruptive innovation, according to the concept creator Clayton Christensen, "describes a process by which a product of service takes root initially in simple applications at the bottom of a market and then relentlessly moves up market, eventually displacing established competitor". In essence, this type of innovation creates a new market and disrupts the existing market i.e. physical recordings.

There are multiple academic sources that discuss the disruptive innovation that are on-demand music streaming services which will be examined later in this chapter. However, first I consider it important to review literature that explains the impact of the digital developments of the twenty-first century on the music industry. There are multiple works as well as government discussions around the claim that illegal downloading has negatively influenced the recorded music industry (Bender 159). This claim was born from the

declination of recorded sales immediately after the launch of Napster in 1999. Therefore, I will begin my literature review around research regarding Napster.

2.1. Early File Sharing Platforms

Starting with the early file sharing platforms, it has been heavily stated that by using these services for illegal downloads, legal sales have suffered a displacement (Mortimer 3). However, the focus in this thesis is to go one step further and to validate or disconfirm the assumption that due to the decrease in legal sales, there has been an increase in complimentary products, such as concerts, festivals and gigs.

Correspondingly, Julie Holland Mortimer, Chris Nosko and Alan Sorensen conducted a study in order to answer a similar question, although from the perspective of economic policy making. They took a data collection of over 200.000 concerts from more than 12.000 artists from 1995 to 2004. However, they could only combine this data with sales data from 1806 artists (4). They expected that as from 1999, there should have been a visible difference in how many records were sold as well as how many live shows were performed. This would confirm that the launch of Napster during that year had a direct impact on the consumption of recorded and live music. As they predicted, during the end of 1999, there was a radical shift in the consumption of these complementary products, as can be seen in the figure 1.4.

Below, the sharp increase in live performances around the year 2000 can be observed, as well as the sharp decrease of album sales. This is confirmed in further research by Mortimer et al. in which they state that, "annual sales were growing at double-digit rates in the years just before file-sharing but began shrinking after file-sharing" (7).
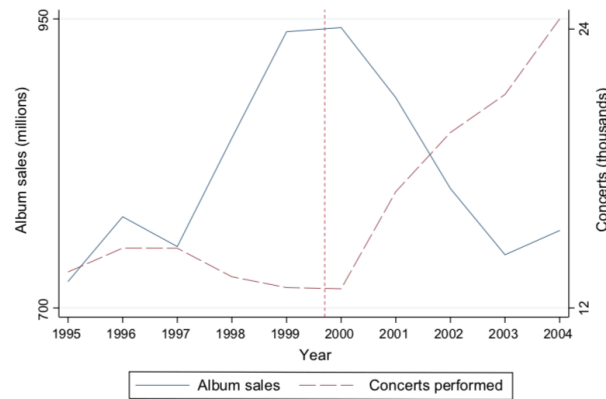
Fig. 1.4. "Album sales and concerts", 1995-2004, Mortimer et al. 2012.

Consistent with their research, Mortimer et al. found that file sharing had two kinds of effects on live music performances: one on demand and one on supply. They state that if "recorded music and live performances are complements, then increases in the consumption of recorded music due to file-sharing should lead to increased demand for live performances" although at the same time if file sharing reduces the profits from selling recorded music, they expect artists would no longer allocate efforts towards recording, but focus primarily on live performances (4).

In either case, I believe it is valid to state that file sharing, or more specifically, the launch of Napster, has had a direct impact on the number of recorded albums sold, as well as the number of live shows performed. Even if musicians redirected their efforts from recording music to focusing on live performances, they would possibly sell an equal number of albums as if they concentrated all their efforts in recording musical content as people are resorting to streaming services and live performances more than recorded CDs, which essentially means the number of CDs demanded could be the same in any case. Research might suggest that with new technologies like streaming services, physical music is not a necessity. However, the above mentioned is purely a speculation, and has yet to be confirmed. It could be that if they did not perform live performances at all, people would not

have the choice of spending their money on complementary services and would only have the recorded material available. Either way, the consumer would probably opt for the digital version on Spotify, Apple Music or YouTube before laying out the money for the physical copy. This is mainly because of inconvenience and how we have become accustomed to having everything on one device; music, contacts, e-mail, movies, magazines, news and more.

However, despite predicting an increase in concert revenues, Mortimer et al. found that large artists "have been largely unaffected by file-sharing" (14). They did find that Napster contributed to a "broader distribution of music which appears to have expanded awareness of smaller artists" (Mortimer 14). We could argue then, that despite Napster affecting the sales of physical copies in a negative manner, it has contributed positively to an expanded awareness of the lesser-known artists.

At the turn of the millennium, concert promotion was getting high levels of attention. Clear Channel Entertainment, now known as the biggest live performance company Live Nation, was expanding their live performance promotion (Mortimer 14). Therefore, it is important to note that there may be other influences in the change the music industry saw in the early twenty-first century and we cannot guarantee or assume that the decrease in record sales was only a consequence of peer-to-peer file sharing services such as Napster or LimeWire.

Similarly, Stan J. Liebowitz, examined to what extent file sharing has damaged the music industry, specifically the decrease in recorded sales. In 2008 he wrote: "our results indicate that file sharing has caused a large decline in record sales" (858). As a complementary investigation, he studied the prediction of record sales for the years 1998 to 2003 in the case file sharing had not occurred. His results implied an increase in record sales

that was comparable to the historical average (859). However, whether this would have been true or not we shall never know. The important fact remains to be the decrease is recorded music sales occurred as a direct consequence of the creation of file sharing services, in this case specifically referencing Napster.

On the contrary, Seung-Hyun Hong, from Stanford University, studied the effects on Napster on recorded music sales and found contrasting results, which he published in an article in 2004. Although recognising Napster as a big contributor to the declination in record sales, Hong discovered other possible causes to said decrease, although also acknowledging Napster as a contender (2). Firstly, he found household spending on music in the US had declined by $2.46 as "a result of using the Internet and, plausibly, starting to use Napster" (28). He states that this accounts for "33% of the decrease in total recording sales in 2000" (28).

Furthermore, he noticed that the change in "prices of other entertainment goods also explain the slump" (28). In fact, he believes that this counts for 37% of the total decrease. Finally, he states that 47% of the total decrease of recorded sales could in fact be due to the transition from Vinyl LPs to a CD format. In the 1990s sales were at their highest with the transition to CDs. Therefore, it is possible that the declination that followed could in fact be caused by the consumer becoming accustomed to the new format and therefore, no longer seeing it a novelty and purchasing less.

Conclusively, Hong states that more than "80% of the music sales decrease in 2000 might have resulted from factors aside from Napster" (28). Therefore, despite multiple scholars focusing their attention on Napster alone as the sole contributor to the decrease in recorded sales, it is important to consider other influencers present around the end of the twentieth century.

Additionally, there are other scholars and studies that back up the basis of the statements made by Hong. An example is Patrick Mooney, who performed a study in order to find out if Napster was the true contributor to the decline in sales. He found that there were two primary reasons that were often overlooked. One being the sale of vinyl singles. Mooney believes that there is in fact a declination in recorded CDs, but this could be due to the increase of sales in vinyl singles (17). However, as most studies and reports refer to a declination in recorded sales in general, there is not a clear separation between CDs and vinyl singles.

This means then, that either way, Mooney had to consider there has been a decrease in recorded sales as a whole and therefore his assumption cannot be considered entirely accurate. On the other hand, Mooney also mentions that the decline in sales could merely be due to a "lack of interest" in the music offered (18). However, again this assumption cannot be entirely verified as, in my opinion, the declination of sales covers a too large of a period to consider the reason to be primarily related to personal taste and preference. As can be seen in figure 1.5 below, the decrease in physical recordings rapidly plummets in 1999 with the launch of Napster. It isn't until 2004, shortly after the release of the iTunes Store, that recorded sales begin to rise. However, the rise is only observed in digital sales and physical sales continue to decrease.

Additionally, even despite the rise in digital sales, the rate at which they increase is relatively slow. Therefore, to argue that the recorded sales decreased due to a lack of interest is likely to be untrue, as for it to be valid there would have to be a general lack of interest for a period of five to ten years, which I consider to be highly unlikely. Although, it must be mentioned that younger audiences may have redirected their interests to other media.

However, according to an article on Medium, the 2000s saw the adult contemporary and R&B become a trend, including well-known Beyoncé, Coldplay, Eminem, The Red Hot Chili Peppers and Kanye West. Both genres are considered to be highly popular, in fact, many millennials still listen to them today (Rifftime). Therefore, the possibility that the declination in recorded music sales is influenced by a general lack of interest is a statement that I do not find entirely convincing.
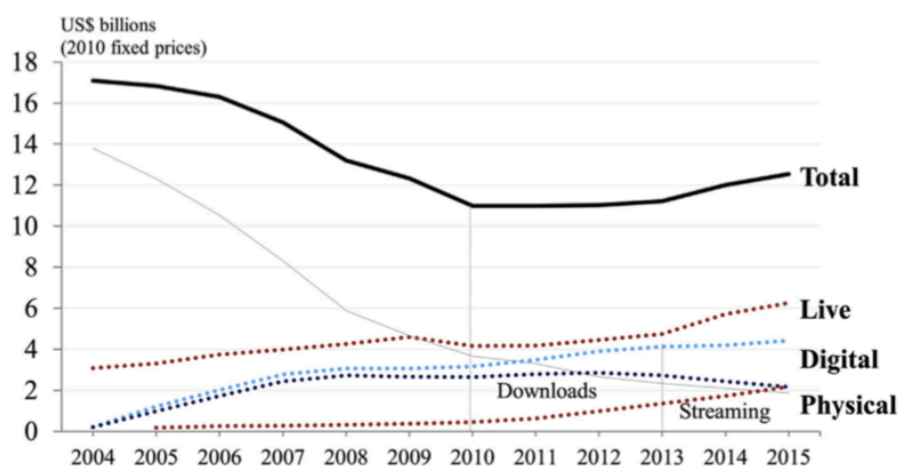

Fig. 1.5. "Development trajectory of the Us music industry by revenues (2004-2015)" by Naveed et al. 2017.

Despite the negative impacts of downloading music, there are another perspective that supports file sharing as a positive contributor to the music industry. There is an economic theory known as 'the sampling effect', also known as 'the exposure effect' which occurs when a consumer is allowed to become accustomed to the product before deciding to purchase it. Liebowitz argues that file sharing and downloading music could be a strategy of the sample effect (438). In this case, the consumer would download a song, without paying any amount of money for it, with the intention of seeing if they like the song enough to purchase it. According to Liebowitz, this sampling usually ends in an increase in sales (438).

However, in the case of recorded music, this has not been true. It would be ideal if a consumer could sample a song and then decide they enjoy it and therefore make a purchase. This is a feature the well-known music app Shazam uses. They allow the user to listen to a short part of a song before offering them the possibility to purchase. It seems that the consumer should only be offered to sample a short portion of the song as if given the possibility to download the whole song, they would unlikely make a purchase, resulting in economic harm toward the artists.

As a result of the literature reviewed thus far, I can begin to conclude that in the time of early file sharing, between 1999 and 2004, the main reason for a declination in recorded sales is the launch of Napster and the similar sites that followed. Despite the birth of legal digital music libraries such as the iTunes Store, there continues to be a decline in recorded sales as people are most likely going to consume music that is free as opposed to music they have to pay for, even if it is a small premium of 99 cents. However, with new options such as streaming services, it might just be possible to alter consumer behaviour and provide a fairer trade for musicians to produce and consumers to enjoy.

Furthermore, I recognise there are other factors to keep in mind when it comes to understanding the reason behind this declination of sales, such as recorded music pricing as well as complementary goods such as live performances. It has been said by multiple scholars that live performances began to increase as recorded sales plummeted. I am not entirely convinced that the rise in live performances is the direct consequence of the decreased sales in recordings, as I consider the increase of promotion strategies, focused on live performances by Clear Channel Entertainment at the time, to be a highly convincing contributor. I consider the increased promotion of live music performances by Clear Channel Entertainment can largely influence the number of live music shows performed. Therefore,

we must not consider the rise in live performances solely a result of decreased recorded sales, but also a rise in promotion and marketing strategies focused on that cause. Whether or not live music performances have been influenced by the drop of recorded music sales will be discussed later in chapter 4.

2.2.   Streaming Services: Damaging or Refreshing?

There are two types of streaming services: interactive and non-interactive (Aguiar 282). In this research project, I will focus primarily on interactive streaming services, i.e., Spotify and YouTube. Interactive streaming services are those that allow the user to choose freely what songs they would like to hear. This can be done in two ways. They can either pay the monthly subscription, or they can be exposed to advertisements as a form of indirect payment (Aguiar 282).

Some argue that streaming services act in similar ways as traditional radio (Aguiar 279). If this is true, streaming services could possibly be seen as a form of musical promotion and therefore would contribute towards an increase in recorded music demand.

Kashif Naveed, Chihiro Watanabe and Pekka Neittaanmäki conducted an empirical analysis in 2017 within the US music industry of monthly trends over a period of three decades with the intention of explaining how streaming services, along with the live music industry, are the key to "the sustainability of the music industry" (1). As mentioned above, the music industry has suffered a large decline in physical recorded sales, and although digital sales are more stable, artists are turning to live performances in order to sustain their passion and career. There have been strong speculations that the digitalisation of music will result in a potential collapse of the music industry, similar to other creative industries such as printed media, i.e., newspapers and book publishing (Naveed 2).

However, with the existence of musical streaming services, which are becoming increasingly more popular, along with the practice of live music performances, there is hope for a survival and even growth of the music industry.

Naveed et al. refer to the co-existence of musical streaming services and live music performances as a sustainable music industry (4). Naveed et al.'s empirical analysis revealed that the "co-evolution between the streaming and live music industries has functioned well over the last few years" (14).

Therefore, if the music industry will experience sustainable growth with the co-existence of streaming services and live music performances, what does this mean for recorded sales, both digital and physical?

A possible answer can be found in a study conducted by Minhyung Lee, Hanbyeol Choi, Daegon Cho and Heesoek Lee in which they analysed the impact online music streaming had on recorded sales. The results of their analysis were published in 2016 in their article "Cannibalizing or Complementing? The Impact of Online Streaming Services on Music Record Sales". They found that online streaming services "positively impact music record sales" (662). However, it is important to note that they collected their data from the Korean Gaon Music Chart, and there may be some discrepancies with European or American results. Nevertheless, thus far, background research for this thesis has shown little variation regarding geographical factors when it comes to the decline of record sales and streaming service consumption.

Lee et al. suggest that with the help of streaming services, recorded sales can increase as "consumption of digital products leads consumers to purchase more expensive physical products, i.e., offline music records, which provide the same experience" (670). However, I personally have difficulties agreeing entirely with this statement. Streaming services and

physical music records do not provide the same experience. Streaming services are a much more efficient and convenient way of listening to music in the digital era. As mentioned, we have left behind the days in which someone went to a social gathering with their music collection of 50 plus CDs. I find it hard to believe that consuming digital music leads us to the purchase of physical music, as streaming services offer you the possibility to carry your music with you offline and online, and in one space, at a low monthly cost or even for free. As for the 'same experience' mentioned by Lee et al., personal experiences suggest them to be highly different. Streaming services provide you with music on the go, of all genres and even new discoveries, whereas with physical music you become more aware of your listening habit, what song you are choosing and often you will listen to it at home, creating a relatively special moment between yourself and the music. There is a notable difference between intangible digital products and physical media, especially where materiality is concerned.

Furthermore, although we live in a very material society, as a consequence of digitalisation, we are actually evolving to prefer experiences over material. According to an article written for The Guardian, buying more stuff is associated with "depression, anxiety and broken relationships" (Monbiot). Experiences, however, could lead to an increase in happiness, according to an article by JR Thorpe. As humans are innately social animals, interacting with other humans undergoing a social experience will naturally connect them.

Therefore, it can be argued that from a general perspective, we are more likely to enjoy experiences than material, and possible enjoy a live concert more than simple listening to a band at home. Research so far validates this, as streaming services are replacing physical music, but live concerts and festivals are becoming increasingly even more popular. Nonetheless, it is important to make note that streaming services currently lay somewhere in between material and experience. Music via accessed-based services remains intangible,

therefore not associated to material, but can also be enjoyed in solitary and without leaving the house.

Therefore, can we consider listening to music via streaming services an experience? Maybe this is only valid in the case of a social encounter. A theory was developed in the late 1990s by Joseph Pine and James Gilmore, known as the 'Experience Economy' which ruminates how experiences are replacing materialism, and will be later discussed in chapter 3.

In 2018, Luis Aguiar and Joen Waldfogel studied whether streaming "stimulates or displaces the sales of recorded music" and state this is "vital to our understanding of its impact on the fortunes of the recorded music industry" (279). They noted, that as streaming has zero-marginal costs, it can raise revenue and consumer surplus (279). Consumer surplus is the difference between what you can buy a product for and the amount you are actually willing to pay. Marginal costs are the extra costs of adding more products. In the case of streaming services, it does not cost more to have 100 songs or to have 1000 songs.

They found positive connections between sales and streams and that the "impact on overall recorded music revenue depends on the relative sizes of the payments per streams and per permanent track-equivalent sales, as well as on the rate at which additional streams displace sales" (305).

However, their study did not make a clear differentiation between paid and free streaming services. To understand this differentiation better, I turn to a study carried out by Nils Wlömert and Dominik Papies in 2016.

Wlömert and Papies discuss the risk streaming services have of "cannibalization of other distribution channels" and that it could "reduce overall revenues" (314). These statements are parallel to those discussed previously by Lee et al. However, as mentioned, Wlömert and Papies dive further in the field of streaming research and investigate the impact

of free and paid streaming services on music expenditures and total music industry revenue (314). Their research consisted of 2500 music consumers' habits over more than a year. They revealed that, "the adoption of a free streaming service as well as the adoption of a paid streaming service cannibalises consumers' music expenditures" (314).

In marketing, cannibalization is "to cause a reduction in the sales of an existing product of service by starting to sell a new product of service" according to the Cambridge Dictionary ("Cannibalize"). Hence, in the music industry, cannibalising essentially means that by succeeding in streaming services, other revenues will be decreased, most likely recorded sales.

2.2.1. Spotify

After considering the literature explained above, opinions regarding the impact of streaming services on music industry revenues are varied. While some argue that they are impacting the music industry in a positive way, others have discovered that streaming services decrease consumers' music expenditures. However, there is one streaming service that seems to be a milestone in shaping the new music economy. Enter Spotify.

Patrik Wikström, expert of research in innovation in the creative industries, explains how Spotify, one of the most popular global streaming services, may have managed to create a sustainable music platform. Unlike other streaming platforms before it, Spotify offers major rights holders shares within the company as well as offering a 'freemium' platform (Wikström 16). A 'freemium' platform is one which, as mentioned previously by Aguiar, offers the user a free option, with the exposure to advertisements, or a paid monthly subscription for unlimited access. Wikström explains that for the free version, in most cases, profit margins are negative or low and subscription fees are expected to balance revenues out

enough to "make the service profitable" (16). It is a common statement among friends who use Spotify, that the advertisements become so annoying, they eventually opt for the paid version. People are increasingly switching to the paid subscription also because of special family or student deals. My personal observation of Spotify is confirmed by Wikström in his article "The Music Industry in an Age of Digital Distribution". He mentions that in 2014, Spotify had achieved a "conversion rate of approximately 20 percent, which means that 20 percent of the total user base is using the premium version and pay a monthly subscription fee" (17).

There seems to be a significant amount of criticism that freemium streaming models may not present a long-term sustainable model. In the case of Spotify, rights holders are subject to certain business risks as they do not follow a traditional musical payment scheme. Wikström explains that streaming services, also known as access-based services "have argued that rather than paying a fixed amount per track thar is listened to, they should simply share whatever revenues are generated with the rights holders" (17). These proceeds include both advertising incomes as well as the subscription fees, meaning that the rights holders also depend on the advertising agencies ability to captivate the consumer and create revenue.

It is said that around 70% of advertisement and subscription incomes have been "paid in royalties to rights holders" (Wikström 18). The ability for music companies to buy a share in Spotify's company allows the platform to provide consumers with a useful platform as well as contribute to the sustainability of the music industry, instead of cannibalizing it. In fact, Wikström confirms that, "at the end of 2013, the company has generated more than a billion dollars for rights holders around the world", which for him it proves "that their model does work" (18).

2.2.2. Apple Music

Another streaming platform worthy of its mention is Apple Music. As stated in chapter 1, Apple Music has gained recent media attention as iTunes is being integrated within the music app. In fact, this has likely been one of the main reasons it has quickly become Spotify's main competitor (Coffey 15). Compared to other streaming services, Apple is considered fairly late to the game. However, because of its background it had a quick start and gained millions of users in a short amount of time (Goldsmith). He recognises Spotify's global leadership but mentions that Apple has in fact "won over the US market" as *The Wall Street Journal* revealed Apple Music overtook Spotify in April 2019 with 28 million paid subscribers compared with Spotify's 26 million.

Aside from the fact that both streaming services offer relatively similar features, there are a few differences worth mentioning: Spotify offers the user a 'Discover Weekly' playlist which, in a previous research project of my own, some have said is more tailored to personal tastes, whereas the 'For You' feature on Apple Music is not so specific. Another feature, targeted to verified musicians only, is that Apple Music supplies analytical tools which provide artists with global streaming data. According to the service it ¨provides a level of details beyond anything currently available" (Variety Staff). It shows data by song, album, playlist, location and more. It essentially provides the artist with insights into where their fans are growing, which would prove very beneficial for concert promotion strategies.

Despite relatively small amounts of literature written around Apple Music, the general consensus is that it acts equally like Spotify and therefore my conclusions regarding its impact are limited. I consider the impact of Apple Music to be comparative to Spotify on the music industry. However, further research is needed to correctly establish the consequence it

has on the music industry. Due to its recentness, I believe it would be interesting to investigate its use in a few years and compare it to Spotify and other streaming services.

2.3. Artist Revenues

In fact, to simplify, Kabir Sehgal wrote an article in 2018 clarifying the amount of money an artist may earn with streaming services. He mentions both Spotify and Apple Music in his article so the information provided can be applied to the streaming services mentioned previously. Sehgal believes artists are "getting a raw deal" as Spotify pays "about $0.006 to $0.0084 per stream to the holder of the music rights" (Sehgal). Sehgal uses the example of Taylor Swift and her song 'Shake It Off'. It reached 46.3 million streams which brings an estimation of between $280.000 and $390.000. However, if we think about the lesser-known artists, a calculation shows that, "1 million plays on Spotify translates to around $7.000", which is hardly a fair price for the likely high efforts put in by the artist. How to avoid this then becomes questionable. If consumers are paying around ten euros or dollars a month for an unlimited music collection, how much higher can we raise the price without falling back on illegal downloads? The streaming service business model seems to provide the artists with a more beneficial outcome than file-sharing platforms, but is it enough to sustain their careers? Would consumers be prepared to pay more if they were aware of the very small amount of money artists earn, especially smaller artists? This is a question I intend to provide an answer to at the end of this chapter.

Another answer to artist revenue issues proposed by Sehgal is that Spotify should "disintermediate record labels that can take as much as 70% of the money royalties" and become a record label, signing specific deals with the artists themselves and cutting out the middle man. Patrik Wikström also questions the fairness in artist revenue and that some

"actively choose not to license their music to the services such as Spotify because the revenues that end up in their pockets is almost ridiculously low and that they do not want to support a corrupt and unsustainable system" (18).

Similarly, it has been stated that, "many artists seriously thought of being too reliant to and unfairly compensated by the record companies and digital music service providers" (Naveed 2). If this is true, then we should be able to observe, over time, an overall decrease in digital and physical sales as well as fewer artists using streaming services. It is no wonder that artists are choosing to increase their live performance presence after experiencing the consequences of early file sharing and streaming services. However, it is fundamental we consider that lesser-known artists can often become more known through streaming services because of their music discovery influence. With features like 'Discover Weekly' and the technology behind Spotify's algorithms, users can enjoy suggestions by Spotify based on their listening habits, which can lead the user to discover new artists, often ones that are not yet 'globally famous'.

Furthermore, Lee Marshall created an outline in 2015 towards the controversial debate regarding the benefits and disadvantages of streaming services in the music industry. He recognises in his paper the controversy over "the amount of payment being given to artists for allowing their music to be made available on streaming services such as Deezer, and especially, Spotify" (177). It is worth noting that artist revenues through the main streaming services are estimated to be roughly the same and therefore, due to a lack of literature because of the newness of Apple Music, the information provided could be applied to Apple's streaming service, but of course, there could be variations. However, the information provided is regarding Spotify primarily as it has been centre to public debate in the media in regard to artist remuneration.

Despite Spotify receiving much attention for its low pay-outs, Marshall states that the business model of on-demand streaming "is one with which the major labels are familiar, and which suits their existing strategies" (185). He states also that, "the fact that labels have a stake in Spotify has merely added to the suspicion and distrust towards the company and its royalty system" which adds to the large debate of whether or not on-demand streaming services are in fact benefiting or killing the music industry.

According to *Ditto Music*, the money an artist will get for the streaming of their song depends on a variety of factors: the listeners' country and location, the listener's free or paid account and, the artist royalty rate. Despite it being nearly impossible to predict how much an artist can earn via streaming, there are calculators available online which can make rough estimations ("How Much Do Music Streaming Services Pay Musicians in 2019?"). *Ditto Music* estimate that for 1000 streams on Spotify, the rights holder would earn $4.37, which would then be divided among the contributors.

2.3.1. Survey Results

These findings led me to wonder if the general consumer of Spotify was aware of the (estimated) remuneration artists receive for their streamed music. Therefore, I decided to carry out a small survey to better understand if people knew how much streaming services paid out and if they didn't, and realised how low it was, would they be prepared to pay more. The exact questions asked in the survey can be found in Appendix A at the end of this study. This survey was formed of both open-ended as well as closed questions and intended to clarify the value consumers have in regard to the music they stream and the artists that make it. I predicted while making the survey that when people would become aware of how low the price streaming services pay to the holder of the rights, they would be prepared to increment

the amount they pay for their subscription. This prediction comes from my own surprise at the price paid.

In total, a total of 70 people took part in this small study. The majority, a total of 34 participants, were between 22 and 30 years old. 21 people were over the age of 50, 8 were between the ages of 18 to 21 and 6 were between 31 and 50. There was one person under 18. Only 11 out of the 70 participants did not use streaming services for various reasons including cost, having no need for it, downloading their own music (no specification whether legally or illegally) and, not knowing what streaming services are. The most used services were Spotify, followed by YouTube and Apple Music. The majority of people have a paid account and only 11 of them use a free version. However, it is important to make note that out of the uses of Spotify, only 3 of them used the free account. The other participants who answered 'free account' were referring to YouTube as their primary service.

Following this, the participants who have a paid account were then asked about the price of their subscriptions. One of them believed the price to be 'very expensive' and only 4 believed them to be 'very cheap'. The majority, however, thought the price was indifferent, with 21 people marking it a 3 out of 5 on the price scale or 'cheap', with 19 people marking it a 2/5 on the price scale.

Out of the 48 respondents that paid for streaming services, only 3 had an idea regarding the artist revenue. The rest had 'no idea' when it came to estimating the price paid per stream to the rights holder. In fact, when given the chance to make an estimation, in euros, of the price paid by Spotify to the rights holder per each song streamed results ranged from 0.001 euros to 3 euros. The participants were then told how that for every 1000 streams, Spotify will pay out roughly €3.65. 24 of the 48 participants thought this was neither a fair or

unfair payment, while 28 thought it was either unfair or very unfair and only 7 considered it fair or very fair.

Finally, the results of the survey show that out of 59 people who use streaming services, 45 of them would not pay more for their subscription despite knowing the low price paid to the rights holder, artist, producer or others. In fact, 16 of the 59 participants then stated they would actually prefer to pay less than the average monthly subscription fee of €7.99 to €9.99. The majority would like to continue paying the same amount as they pay now, and 16 people would now be prepared to pay more for their service. Therefore, the survey answers my own personal question "would people pay more for streaming services if they knew how little artists earn from them?" with 76.3% of the 59 participants saying they would not, contradicting my prediction. However, it is important to note that this survey has its limitations as participants may not have entirely understood much of the €0.0036 per streamed song goes to the actual artists as this is incredibly difficult to calculate. Each artist has their own contract and will have negotiated a different percentage with the rights holder.

2.4. Conclusion Chapter 2

This chapter has reviewed just some of the vast literature readily available that focuses on researching the consequences of digitalisation in the music industry. There seems to be a general consensus that, as explained in chapter one, recorded music sales have declined with the rise of the Internet and Napster. The consequences of this decline in music sales have led directly to music streaming services. On-demand services such as Spotify and Apple Music are becoming increasingly more popular and already boast of millions of subscribers.

However, despite streaming services saving the industry, some scholars argue that this system is in fact "cannibalising" the music industry and leading it to its prominent death. Nevertheless, there are multiple academics that note the importance of streaming services in today's music scene and consider that, along with live performances, the co-existence of both systems is key to a sustainable music industry. This is mainly a consequence of using different methodologies, as they will result in different conclusions. However, I consider enough literature has been reviewed to make the following concluding statement: without streaming services, the consumer would have to return to purchasing songs and albums, and as file sharing platforms are still available on the vast space that is the internet, they would likely return to illegal downloads. Therefore, streaming services are imperative to the survival of the music industry.

Additionally, this chapter has stepped lightly into the field of artist revenue. As recorded music declines, artists have suffered serious economic consequences. And, although streaming services do provide them with an income, this remuneration is low. Unless you are a very well-known artist on Spotify, you are likely not going to make a large income through this service. However, it does provide the lesser-known artists with certain benefits such as exposure and music discovery. With features like 'Discover Weekly' on Spotify or 'For You' on Apple Music, smaller artists can gain exposure and consumers can discover new music. These services also provide independent artists with certain analytical tools which will help them know where their music is consumed, maybe encouraging them to add certain locations to their upcoming tours.

Furthermore, this chapter has used quantitative research methods in the form of an online survey, which revealed that the majority of participants not being aware of how much

artists earn through streaming services, and despite being informed of how little they earn, they would, in general, not be prepared to pay more for the service.

After understanding more about the digital developments and their consequences on the music industry as a whole, the upcoming chapters will intend to better grasp how different live performances have become in the last two decades. If the music industry has shifted and business models have turned, meaning live performances are a priority for the artist when it comes to income, then live performances themselves must have also changed. I believe that in an industry as large as the one of music, one fragment cannot change without affecting the other. As live performances and recorded sales are complements of each other, then when one is modified, the other will also suffer immense change. We all, as consumers or artists, must adapt.

3. From Material to Experience: A Theoretical Framework

The present chapter will serve as a theoretical framework for this thesis to contribute to answering the sub-question "How are live music performances different today as opposed to twenty years ago?". By analysing theories related to live music performance and experiences, I will create a framework that will serve as an analytical lens which will be applied later to my case studies in the final chapter, number 4.

To begin with, I would like to point out that Coldplay, the well-known British pop-rock band, announced last week (in November 2019) that they would not be touring their new album *Everyday Life,* "until they find a sustainable way to do it" (Nicholson). This is only a possibility for Coldplay as, according to The Richest, they already have a net worth of over 431 million euros. However, for the majority of artists, not touring has become an unthinkable act. Although they rely firstly on revenues from music licensing for television,

movies or advertisements, they also depend heavily on touring incomes to fund their careers (Baxter-Moore 1).

With a record-low number of recorded sales and less than thrilling returns from on-demand streaming services, live performances have become a priority for musicians, both the well-established and new. According to a recent study by Pricewaterhouse Coopers or PwC, there will be an important growth in the next years in the live performance industry. In fact, PwC reveals that, "live music revenue will be increased at a compound annual growth rate of 3.3% heading into 2022" (Sanchez). This prediction comes after the release of the Global Entertainment and Media Outlook report for 2018-2022. This report also makes note of the predictions made for recorded music, although in the digital form of streaming services and not focusing on physical sales. While it recognises the importance of these services, and the estimated growth of up to 18%, it also makes an important statement in regard to live performances, in that streaming services will not "match the strength of the live concert industry" (Sanchez). The report also confirms statements and assumptions made previously in this paper as it considers the live music industry and streaming services to be "intertwined, with streaming services often propelling crowds towards live performances", therefore meaning that one needs the other in order to sustain the industry, again confirming the complementary nature of the music industry (Sanchez). Moreover, the report reveals a rise in convergence as live events are becoming increasingly more popular also in other industries, which, as discussed in the introduction of this thesis, are likely linked to digitalisation (Sanchez). PwC additionally discusses "ubiquitous connectivity" as one of the key drivers of the change we are observing in the entertainment industry, referring to the developments in technology and network infrastructure which have connected consumers and their devices, and "support an ever-expanding supply and diversity of content, experiences and applications

that can be delivered directly and digitally to users" as the devices used are "always on" (Van Eeden and Chow 6). Therefore, it is possible to make a statement which connects digitalisation and the observed and predicted growth of live performances in recent years. This confirms initial assumptions implying the existence of a causal relationship between digitalisation and the increase in live music performances.

Additionally, despite the attention of this research thus far on artist remuneration and the economic need for live performances, it is imperative we consider other reasons that could contribute to the recent increase of said performances, including an increased demand in experiences and hyper-realistic conditions of performance. The increased demand in experiences is explained further in this chapter by reviewing a theory proposed by Pine and Gilmore called The Experience Economy. The hyper-realistic conditions mentioned refer primarily to the use of technology and theatrics which result in a state of hyperrealism, a notion which will also be explained further during this chapter.
According to Kashif Naveed, Chihiro Watanabe and Pekka Neittaanmäki, authors of the article 'Co-Evolution between Streaming and Live Music Leads a Way to the Sustainable Growth of Music Industry', live shows have become "increasingly more popular and valuable because live music is something fans cannot fully experience merely by listening to recorded or online music" (3).

Furthermore, in order to better understand the changes in the live music industry over the last two decades, I will base my findings primarily on the theory of experience economy, first developed by Joseph Pine and James Gilmore in the late 1990s, as well as arguments made by Angela Cresswell Jones and Rebecca Jane Bennet in their book *The Digital Evolution of Live Music*. Additionally, I will complement my research by considering Jean Baudrillard's notion of hyperreality, explained later in this chapter.

Firstly, Pine and Gilmore discuss in their book *The Experience Economy*, how products have suffered a transformation from function-based to experience-based (5). When an individual purchases an experience, they "pay to spend time enjoying a series of memorable events that a company stages – as in a theatrical play – to engage him (or her) in an inherently personal way" (Pine and Gilmore 3). Despite experiences not being a novice concept, they have received significant attention over the past few decades as "the number of entertainment options have exploded to encompass many, many new experiences" (Pine and Gilmore 3).

Following the footsteps of Pine and Gilmore's theory, Swarbrick et al. suggest that live music performances are one of the most "memorable forms of musical engagement" (1). Similarly, Pine and Gilmore note that companies have been confronted with the need to create additional value for their goods and services. They are faced with the challenge of turning the tangible and intangible into the memorable (Pine and Gilmore 17). This justifies why "consumers have also sought other live entertainment experiences" which was mentioned by Daniel Sanchez when reviewing the previously discussed report by PwC. This can equally be applied directly to the music industry as a whole. From this perspective and viewing the music industry as an industry of goods and services, in order for the industry to work and grow, there must be tangible, intangible and memorable goods or services.

Therefore, the physical recorded song can be considered the primary tangible good. Streaming platforms then become intangible services, and live performances are seen as memorable experiences, thereby adding value to the primary good, in this case the recorded song. This then confirms the speculation that recorded music can be used today as a promotional tool for live performances as the memorable experience is first and foremost, followed by a tangible and commemorating product, presented in the format of a CD.

As a result of reviewing this theory in the context of the music industry, I suggest that the ability for artists to improve the audience's experience during live performances, whether it be small gigs, large concerts or even festivals, likely impacts the increase and growth of the live music industry as the live performance becomes a memorable experience. Likewise, it would explain why performers are changing the way they perform, as they depend heavily on the success of their live shows. Therefore, this theory has become central to the theoretical framework which will help me answer the sub-question: "How are live performances different today as opposed to twenty years ago?".

According to Pine and Gilmore, in their introductory paper published in the Harvard Business Review about their book *The Experience Economy,* experiences can be categorised into "Four Realms" (102). They suggest that attending a concert or a music festival would fall somewhere between the realm of passive participation and the realm of absorption (see figure 1.6). Furthermore, Pine and Gilmore suggest that the richest experience would "encompass aspects of all four realms, forming a "sweet spot" around the area where the spectra meet" (102). They additionally suggest five recommendations when designing memorable experiences:

1) Theme the experience: This action ties all components and complementary services of the experience together to create a memorable moment.

2) Harmonise impressions with positive cues: introduce "cues that affirm the nature of the experience to the guest" and that will support the overall theme (Pine and Gilmore 103).

3) Eliminate negative cues: it is not enough to purely implement positive cues, but necessary to also eliminate anything that contradicts or distracts from the general theme.

4) Mix in memorabilia: this is generally quite an easy implementation for musicians as they often provide fans with the change to purchase merchandise at their concerts. The experience should also make note of this memorabilia which could be a simple portrayal of their recent album logo, for example.

5) Engage all five senses: Pine and Gilmore believe, "the more senses an experience engages, the more effective and memorable it can be" (104). Creating a memorable experience is essential if additional value to a product is the goal. Pine and Gilmore also admit that sometimes, some cues "heighten an experience through a single sense" and this can be enough to make an experience memorable (104).
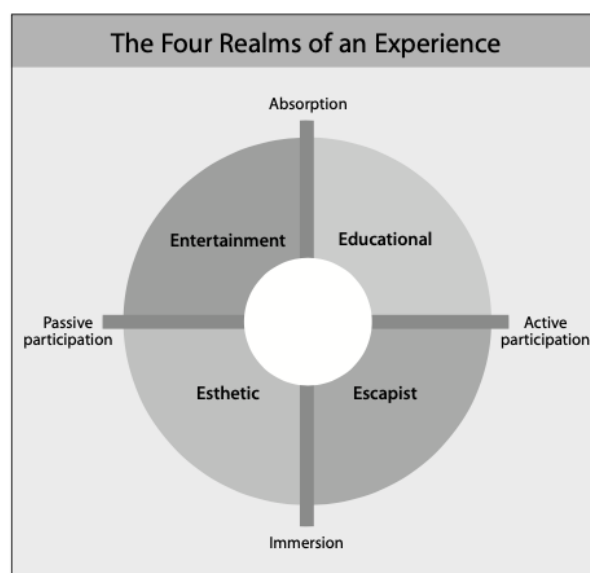

Fig. 1.6. "The Four Realms of an Experience" by Pine and Gilmore, 1998.

Moreover, as mentioned in the introduction of this study, I predicted that in live performances from the last few years, a different experience than those from two decades ago would be observed, as a direct consequence of digitalisation. Pressure is high for musicians to perform well and heighten the consumer's experiences through their live performances.

With new technologies, live shows have infinite possibilities about how to thrill their spectators as well as engage with them and give them the best experience possible. A good

example of using new technology is the loop pedal, which according to Nick Baxter-Moore and Thomas M. Kitts, is a device "that allows them to lay down a rhythm guitar track, then play it back through the pedal while they play a lead guitar break over the top, or put down a vocal track and then harmonise live with the original vocal track that was recorded only a couple of minutes ago" (1). In other words, the loop pedal allows the performer to play various recordings at once, it could be with multiple melodies, vocals or just using different instruments. Although originally invented in 1953 by guitarist Les Paul, Ed Sheeran is well known for his use of the loop pedal and is possibly responsible for the attention the device gets today (Madden). His solo concerts use this device in such a smart way that while being on the stage all alone, the audience experience sounds as if a whole band was present.

Another example is Tash Sultana. In a video uploaded to her YouTube channel, of her "live bedroom performance", one can observe the moment in which, with her feet, she keeps the previously recorded tune playing, while starting a totally new melody at that moment (Sultana 0:35). There are many more technologies and innovations that are altering the experience between the performer and their audience and, although I have noticed a gap in academic research in the field of live music performance evolution, some scholars, such as W. Andrew Schloss, have looked into the role of technology in live performances.

The aforementioned research is primarily focused on the use of computers and the alteration of spectators' experiences through the blurred lines of cause and effect, as one cannot clearly observe how the music is being produced or played (239). We could argue that when a computer is used to create what we ourselves cannot see, we can enter a state of hyperrealism. For example, the well-known British band Gorillaz are essentially a virtual brand as, often their physical presence is not always noticed, or only for a short period of time. Their members are often portrayed as animated characters. This can be seen in a

recording of Gorillaz BRIT award performance from 2010, singing their hit record Clint Eastwood (Gorillaz 0:59).

Hyperrealism is a theory discussed by the commonly known French sociologist and philosopher Jean Baudrillard. He states that from a postmodern universe, hyperreality is the "entertainment, information, and communication technologies (that) provide experiences more intense and involving than the scenes of banal everyday life, as well as the codes and models that structure everyday life" (Stanford Encyclopaedia of Philosophy). In fact, he specifically defines it as "the meticulous reduplication of the real, preferably through another, reproductive medium, such as photography" (Wolny 76). He adds that as individuals, we flee from everyday life and reality to "the ecstasies of hyperreality" (Stanford Encyclopaedia of Philosophy), which could essentially explain our fascination and excitement with live performances and the experience they provide. Hyperreality then, is a distortion of what is certainly real. With the use of technologies like the loop pedal, playback and back tracking, it isn't always easy to separate reality and technology in a live setting. Additionally, performers can try and connect the audience with their performance through hyperreality, by serving them with impressive visuals, light shows, pyrotechnics and unrealistic movements. Think of Lady Gaga floating in the air without any sign of strings or rope. Therefore, the theory of hyperreality becomes a complementary aspect of the theoretical framework used for this research. The live performances analysed in the next chapter could now show an increased presence of hyperrealism.

Furthermore, according to Angela Cresswell Jones and Rebecca Jane Bennett in their book *The Digital Evolution of Live Music*, one of the few sources focused primarily on live music evolution, live music "augments repeatable individualised and deeply personal auditory experiences of the solitary listener and re-frames it and reenergises it by

transforming it into the communal experience with the capacity to engage all of the senses at once" (xii). In fact, they share a similar view to Joseph Pine and James Gilmore in that we are spending larger amounts of our own disposable incomes on experiences instead of "manufactured products" (Jones and Bennett xii). They also confirm statements made in the previous chapter, in which live music sales have replaced recorded music and have contributed to the viability of the music industry (xii). Additionally, Jones and Bennett state that we are currently in an era where "experiences of live events are becoming increasingly sophisticated in terms of delivering real-time, shared experiences through screen-based Internet technologies", resulting in "the demand for physically grounded live music concerts is arguable stronger than ever" (4). This serves as a reminder that despite digitalisation continuously creating new virtual platforms, live music remains to have a significant role, especially as memorable experiences are becoming increasingly more popular.

Jones and Bennett argue that live performances will be "far from redundant" in the near future as they are experiences through which the audience can stabilise their fan identity, instead of getting lost in digitalisation (14). Furthermore, live music allows for experiences that cannot always be replicated in a digital and virtual sphere (Bennet and Jones 23). In a similar way, stated by Pine and Gilmore, in the early 2000s we headed into an economy of experience. The industry of live music is a fitted representation of said experience economy, as live performances allow for experiences to take place that in a certain fashion are priceless. I attended an Ed Sheeran concert in 2018, in which I had to queue for approximately an hour and a half so I could be close enough to my favourite performer, where I could feel the heat from the stage. This allowed me to bond with other Ed Sheeran fans over beers and chips before witnessing one of the best performances I ever saw. As a result, the whole experience remains vivid in my memory, which consistent with Pine and Gilmore's experience economy

theory, has added intangible value to the original tangible product, the Ed Sheeran CD. It even made me spend 25 British pounds on a t-shirt I have since worn less than 5 times. Such an experience is described by Jones and Bennet as jouissance (13), which is defined as "physical or intellectual pleasure, delight, or ecstasy", according to the Oxford Dictionary.

However, it is not only the form of communal experience and cultural engagement that connects us with an experience. Yet another reason for the exhilaration we experience in regard to live performances could be due to the aspect of storytelling. As mentioned, I predict that live performances today are much more theatrical than those of two decades ago, not only because of the possibilities that technological innovations deliver but also because storytelling, not just in music but in all media and entertainment, has become a highly effective method of self-branding as it harvests a connection between the individual undergoing the experience, and the artist or producer of said practice. According to an article written by Alysia Abbott for Globe Magazine, storytelling is bringing people together in the digital era. She quotes Norah Dooley in that, "story is an essential part of human connection that everyone craves" (Abbott). Therefore, if an artist is able to effectively tell a story to his or her audience through a live performance, a stronger connection can be made between them, which could possibly result in a loyal fan following, and higher future concert revenues are a possible consequence.

Furthermore, storytelling is a way of organising thoughts and preserving memories. Stories allow us to interpret changes and differences between the past and the present (Bassano et al. 10). Research regarding storytelling exists mainly around corporate, anthropological and literature perspectives. Storytelling research is now expanding to the media industries, especially with the increasing growth of social media. However, little

research has been done on storytelling in the live music industry and therefore could possible

prove to be an interesting study area for the future.

Nevertheless, in my experience, the ability for an artist to tell a story through visuals

and music at their concerts intensifies the engagement between themselves and their

audience. In fact, many times, spectators will engage with artists at concerts and festivals due

to the stimulation of their senses, not just because they are a fan of said artist. Storytelling has

the capacity to do just that, to enhance your senses and create a community through a story,

which essentially is the baseline of any creative product, and music is no different. Returning

to the example of Gorillaz, the use of animated characters tells a story through art, both visual

and auditory. Another example is Coldplay. In their live performance in Barcelona, which

was a part of their 'A Head Full of Dreams' tour, they finish one song on stage and the venue

turns entirely black, with not a light in sight. A couple of minute later, a smaller stage, among

the audience, shines bright with the band ready to play the song 'Everglow'. This became

part of the story which reflects the theme of the album they were touring at the time.

Another example would be when an artist speaks directly to their audience about their

own experience or a statement regarding an upcoming song. Ed Sheeran frequently did this

during his performance in Manchester in May 2018. On the last night of his 4 days in

Manchester, he spoke openly to the crowd before singing a song, explaining the inspiration

behind it. He also talked about his first years as a performer, how he used to play in local bars

in England before now becoming a world-wide touring artist. Again, this practice of

storytelling connects the audience with the performer and creates a sense of authenticity to

the artist which shows he or she is not just a big star, but a person like anyone else.

Furthermore, the aspect of liveness also has power over live performances. According

to Baxter Moore and Thomas M. Kitts, "technological innovations have influenced our

conception of what is "live" (1). This recaps on the idea mentioned above that we are distancing ourselves from realness and entering hyperrealism. So, it becomes interesting to ask how 'live' live performances actually are. In the same way that it is possible for performances to escape reality, in my experience, live shows can be put on in which everything seems very authentic, but it is possible multiple prerecorded backing tracks are introduced, making it feel genuine but in fact this is not always the case.

Backing tracks are often used to "support live vocals and instrumentals" and "effects pedals and amplifiers can profoundly transform the audience's experience of what is actually being played on stage" (Baxter-Moore and Kitts 1). Think again of the loop pedal mentioned above, used frequently by Ed Sheeran. The illusion of a solo artist, along with the backing tracks of what seems like a whole band essentially tricks the audience into a different experience. In fact, if we think about a solo artist on a stage, with just a microphone and a guitar, the experience we have is not equal or comparable to that which we would get from Ed Sheeran playing all of his songs on his own but still creating the sound of an entire band.

Nonetheless, as we experience an increase in live performances, hyperreality and theatrics, our expectations also tend to escalate. No longer will we be happy with Lady Gaga coming on stage and simply sitting on a stool, with a musical instrument and singing every song from her new album. Although this is equally as talented, if not more than a grand spectacle, we expect a story, we expect visuals and we expect theatrics. Musicians are no longer just artists, they are performers. They are entertainers and, we as consumers expect to be entertained when we attend their shows. The hyperreality we experience in live performances is a strategy strongly connected to Pine and Gilmore's 'Refreshing Experience". They suggest that in order to transcend expectations, a company, or in this case a performer, has "to go off in new and unexpected directions" (147). By doing so, they have

at their advantage the element of surprise. By staging audience surprise "they exploit the difference between what a customer gets to perceive and what the customer expects to get" (146). In fact, Pine and Gilmore consider the element of surprise, "the single most important ingredient needed by any manufacturer or service provided to begin staging memorable experiences" (146).

3.1. Conclusion Chapter 3

Recapping on the theory of experience economy suggested by Joseph Pine and James Gilmore above, it is reasonable to assume that when we visit concerts or festivals, we do not always do so just because we are fans of the artist, but because we live in a world of commodities, where new and existing experiences are increasingly more valued. We, as consumers, have left behind the need to spend our money solely on tangible items but prefer to engage in experiences. It is for that reason, among others mentioned in the chapters above, that live music performances have become so popular in recent years. Angela Jones and Rebecca Bennett also discuss the increased demand of live music experiences and that in the future they will remain as popular as, if not more than, today. Furthermore, this chapter has briefly discussed the theory of hyperreality by Jean Baudrillard, in that live music today has to achieve higher expectations for the audience and go beyond the realms of visual or auditory reality.

However, although an increase in popularity of live music performances led me to the assumption that there must be knowledge in regard to live music evolution, I personally have noticed a gap in research regarding how live music performances have changed over the last few decades. Therefore, the rest of this study will focus on said gap with the hope of better understanding the changes live performances have undergone in the last two decades. I will

visually analyse recordings of live performances by the popular bands Coldplay and Oasis, from the before and the beginning of the twenty-first century and compare them to recordings of live performances from more recent years by following certain guidelines stated in the *Handbook of Visual Analysis* by Van Leeuwen and Jewitt. Additionally, I will use concepts and perspectives from the book *Film Art*, written by David Bordwell, Kristin Thompson and Jeff Smith, to create a more focused lens through which I can understand the visual changes. As a further method of understanding the live music performance evolution, I will also use the 5 experience design recommendations by Pine and Gilmore mentioned above in order to see if they have been achieved.

4. Live Music Performances: Then and Now

This final chapter is dedicated to directly answering the sub-question "How are live music performances different today as opposed to twenty years ago?". With the theoretical framework created in the previous chapter, I will analyse recordings of live performances from two different contexts: concerts and festivals. I will use visual analysis as a form of depicting the differences in the performances over time. As the performances are in video format, film analysis will be applied. There are three distinguished case studies. First, I will analyse the British band Coldplay. This is the primary case study for the concert context. The reason behind choosing Coldplay is due to their popularity and large fan base established in the digital era. Secondly, I will complement my findings by analysing another British brand, Oasis. This case study acts as a supplement to Coldplay, as they became a popular and established band much earlier than Coldplay and live performances from earlier years can be found and analysed. Finally, I have chosen to examine Glastonbury Festival in England to collect results for the festival context. Glastonbury began in 1970 and is still going today.

Therefore, it proves to be an interesting example as an exploration over a longer period of time can be carried out.

4.1. Visual analysis as a research method for live performances

According to Theo van Leeuwen and Carey Jewitt in their book *Handbook of Visual Analysis*, in order to analyse a visual or image, first we need to understand its location (65). Whether or not we voluntarily sought out the image, or in this case the live performance, will influence the way we understand and contextualise it, as well as whether or not it is met in our private lives or in public. All case studies analysed from this point on are assumed to be in the public space, as well as intentionally visited, unless noted otherwise.

Van Leeuwen and Jewitt then advise us to think about why the viewer is watching or looking at the visual we intend to analyse. It is important to consider that one visual can be experienced in different contexts (Van Leeuwen and Jewitt 66). In this case, this applies to the context of small gigs, concerts or festivals. A live performance will not be experienced the same in a small local bar as it will be at a large national festival and the set-up of said performance will also likely be different depending on location.

Furthermore, it is said that, "images can create particular relations between viewers and the world inside the picture frame" (Van Leeuwen and Jewitt 145). In the case of live performances, the visual set-up of the stage as well as the images, colours and lights used, are intended to do just this. As mentioned, performers often try to tell stories, in which the viewer can feel included and engaged. Van Leeuwen and Jewitt make reference to the use of three different factors at play, which result in an interactive meaning of the image or visual: "distance, contact and point of view" (145). And although, this concept is primarily for static visuals such as art pieces and photographs, if applied to live performances, along with

methods of film analysis, we can better understand the intentions of the performer as well as the perception of the audience. Many times, a musician will create an extension to his or her stage to feel like they are becoming closer to the viewers. They are not usually static in one point but tend to move around. This creates more energy and atmosphere but also changes the point of view from which the audience can see the performer.

Ervin Laszlo, a Hungarian philosopher, considered the aesthetics of live musical performances back in the early 1960s. He came to the conclusion that the reason people go to concerts, and not just listen to the recorded version of the music from the comfort of their own homes, is because of the "unique combination of auditory and visual elements in live concert performances" (261). Although recognising that music is an art form meant to be enjoyed by sound alone, he considered it important to consider visual elements as an irreplaceable contributor to the overall experience (261). Laszlo also states that the visual and auditory elements "fuse into a 'synaesthetic' unity for the listener" (272).

It is for that reason, among the many other stated above and in chapter 3, I find it imperative to analyse the visual elements in live performances over time and for that, I have composed a visual analysis of various video recordings of live music performances from a number of artists below.

4.1.1. Film analysis applied to recordings of live performances.

David Bordwell, Kristin Thompson and Jeff Smith introduce the basics of film analysis in their book *Film Art*. They touch upon many aspects of film but only a few will be applied to the analysis of video recordings of live performances.

Firstly, the mise-en-scene of the videos will be observed, which essentially refers to the aspects of "setting, lighting, costume, make-up and, staging and performance" (Bordwell

et al. 113). In film and staging, mise-en-scene is used to achieve realism and authenticity (Bordwell et al. 113). Therefore, it will allow us to grasp whether or not aspects such as hyperreality have been achieved or not, by looking at the staging of the performances.

Next, and possibly one of the most interesting aspects to analyse, is the cinematography examination. In the case of videos of live performances, this refers primarily to the use of angles, heights and shots with which the camera captures the space. It also includes the framing, distance and onscreen and offscreen space. As I hope to be using mostly recordings from the artists themselves, or at least those who are filming on their behalf, it is important to notice what the videographer chooses to include in terms of space or artist movements and actions. After all, they are responsible for reflecting the artist in a certain way and their filming techniques would likely be different to what the average attendee would capture.

Lastly, the final component of film analysis which will be used is editing. As mentioned, the videos analysed will mostly be from the artist's official channels such as YouTube or their personal websites. Therefore, the recordings are edited by their corresponding filmmakers. Editing a video allows the filmmaker to "manipulate time, space and pictorial qualities in ways that shape the viewer's experience of the film" (Bordwell et al. 217). Therefore, the filmmaker chooses what parts of the concert or performance to include and for how long, as well as create certain relations between graphics, space, time and rhythm (Bordwell et al. 219). By doing so, the filmmaker can control the story or narrative to the performance (Bordwell et al. 227).

Nonetheless, it is important to note that the reasons for the choices made by a filmmaker commissioned by an artist are possibly different to those made by a filmmaker for a festival, as they might be more or less objective in what they decide to show, and their

interests may not be comparable. For instance, BBC recordings for Glastonbury could choose different aspects to highlight as opposed to Coldplay or Oasis' music producers or managers.

Therefore, when analysing the video recordings of live performances below, this must be kept in mind as intentions from both parties are most probably different in terms of the artist image they intend to portray.

4.2. Analysis of Case Studies

4.2.1. Case Study 1: Coldplay in Concert

In 2016, Coldplay embarked on what would become their record-breaking tour 'A Head Full of Dreams'. In fact, the tour became such a success that they added additional dates multiple times (Kreps). Due to their popularity, they have become one of the top artists and performers of the digital era. In fact, their latest tour was so well received, Chris Martin and his fellow band members announced in October 2018 the launch of a new film, in the style of a documentary, covering Coldplay's "colourful 20-year history" (Coldplay). They also included three live songs, with the hope of allowing fans the opportunity of reliving their own experience during the tour.

The succeeding information is taken from recordings of live performances by Coldplay, uploaded to their official YouTube channel. First, I will analyse a recording of the opening song 'A Head Full of Dreams' from Coldplay's 2016-2018 world tour. I will also analyse performances from 2009, 2012, 2013 and 2019. The reason behind the selection of these videos is due to the availability of videos on their own YouTube channel, as I tried to remain consistent in my selection.

The first recording is of the first live song during a concert in Sao Paola, Brazil in November 2018 and depicts what live performances can and often do look like in today's

digital music era. The concert commences with an overall darkness and very little light is used. There is a sudden expansion of light which then turns red among the audience. This recording then shows, in the sixth second, the audience screaming, with their red bracelets. In my own experience, I have found that Coldplay include and engage their audience well in their concerts as when entering, you are provided with a bracelet that will light up automatically. This creates a sense of community among the fans, all lit up in different colours. Sometimes the colour can be the same to everyone and in some cases different colours beam through the bracelets randomly. The recording then continues with the intro of the song 'A Head Full of Dreams', which is actually a very well-known speech by Charlie Chaplin. The audience still have a subtle red glow above them. In the eleventh second, a bird's eye view of the venue is captured, showing thousands of little red lights and a large stage with their album logo portrayed on 3 screens. The size of their audience becomes clear in the next shots as the video captures the audience from different angles. As a side note, it is good to know that Coldplay's tour through Latin America starting in 2016 saw attendance numbers between 40.000 to nearly 70.000 people, according to information provided by Live Nation Entertainment to Cision PR Newswire. This number even seems small when viewing the recorded performance. Then, in the 50th second, the camera shows the members of the band, behind the scenes and entering the stage. The audience really go wild and the voice of Charlie Chaplin is toned out as the band begin with their opening song.

The stage portrays the symbol of the album 'A Head Full of Dreams'. This symbol is multicoloured on a black canvas and the red lights from the audience continue to shine. Just as the band start playing, in minute 1:26 of the video, more lights begin to shine, along with fireworks beaming to the sky. The first words sung by Chris Martin are heard just as the camera zooms in on him jumping on the stage. At minute 1:29, he is seen from a low-angle,

which emphasises his position and power on stage (Bordwell et al. 188). During the first song, a subtle red neon LED light frames the stage and the extensions of the stage into the audience. The colour red seems to be symbolic of this song, as red lights are shining almost continuously from the many lamps above the stage, and at times there is a lack of use of any other colours. Red remains prominent during the song on the wristbands of the audience.

Symbolism suggests that the colour red is the colour of extremes and relates to blood and fire ("The Meanings of Red"). This can be translated into energy, power and primal life forces. During the video, lights in the shape of fireworks are launched into the air at multiple different times, again prominently in the colour red, although some other colours can be observed. Towards the end of the song, specifically in minute 3:47 of the YouTube video, Chris Martin, the lead singer, jumps into the air as the song climaxes. At that very moment, a wall of colour-coordinated confetti is launched into the air and the crowd can be heard going wild. Chris Martin has incredible energy during the whole performance, while jumping, dancing and singing at the same time. The recorded performance includes moments in slow motion, emphasising the theatrics of the show. The song ends in an explosion of colour, with a well entertained and what seems like very satisfied audience. Chris Martin can also be observed with a very large smile on his face, suggesting he is also satisfied with his performance.

Correspondingly, according to Bobby Olivier in his article written for NJ.com, Chris Martin researched a notion known as synaesthesia just before releasing Coldplay's seventh album 'A Head Full of Dreams'. Synaesthesia, according to *Psychology Today* is "a neurological condition in which stimulation of one sensory or cognitive pathway leads to automatic, involuntary experiences in a second sensory or cognitive pathway" (Synaesthesia). Chris Martin believes that he has "a bit" of this neurological condition and he doesn't think it

to be "unusual for a songwriter" (Olivier). This aspect of synaesthesia is present throughout the whole tour and essentially turned Coldplay away from rock band and into a rainbow-pop band.

During the whole performance, different angles are used; straight-on, low, and high, all positioning the audience and band members in different positions to create different perspectives. The level of the camera also varies. Most of the time it is parallel to the audience or stage, but bird's eye shots are also used, again making clear the impression of the performance and the audience's excitement.

The mise-en-scene of this performance is coherent throughout the recording as there is generally a black canvas with blasts of colour continuously appearing. The costumes of the band members are coherent with performances from the rest of the tour as well as the colours used. The overall performance remains authentic and realistic but very theatrical.

As for the 5 design recommendations for an experience to be memorable mentioned by Pine and Gilmore in the previous chapter, I can state all 5 have been accomplished. The experience has an overall theme, 'A Head Full of Dreams' is a fantasy experience of colour and excitement, filled with positive cues. Negative cues are not observed, and memorabilia is implemented in the display of their album logo constantly in the background, as well as in the use of the bracelets given to the audience, which they can decide to keep or donate for future performances. Finally, all five senses may not have been engaged as it is hard to evaluate via a video recording. Nevertheless, vision is engaged by the colourful and appealing lights, and hearing is obviously engaged as well. Touch can be felt from the push of the audience jumping together in unison. The smell sense is likely activated by the smell of bodies dancing and moving, likely sweating among each other. However, taste is probably not engaged,

although it is possible as in concerts such as this one, there are often opportunities to buy beer from someone walking with a large 'keg' on his back.

Either way, Pine and Gilmore recognise that although "the more senses an experience engages, the more effective and memorable it can be", this is not always possible and that sometimes it is conceivable to heighten an experience "through a single sense". By intensifying the visual and auditory senses, as well as establishing an overall theme and the presence of memorabilia, this performance is enough to make a memorable experience.

In a more recent recorded performance by Coldplay in The Citadel in Amman, Jordan on November 23rd 2019, the British rock-band can be seen performing their hit song 'Viva La Vida', which according to their caption of the uploaded video was "chosen by fans in a poll on YouTube Community as the song they'd like to hear the band perform". The video starts with a fade-in of Chris Martin centre stage with his hands open to the sky. At the beginning of the recording, again the crowd can be heard screaming and excited. However, unlike the previous recording, Coldplay can be seen in a much more mellow tone, their postures are also more relaxed. No longer are there walls of coloured confetti, or beams of coloured lights reaching the skies, but instead a subtle hint of lilac light lightly shines on the wall of The Citadel behind them. Of course, one of the main differences between this performance and the previous one analysed is the location in which the show was put on. With a much more limited area and less fans, the performance and theatrics the band can put on are reduced. Some bright lights can be seen but when compared to the previous recording, the ambience is comparably different.

However, the refreshing aspect of this performance is the sense of authenticity that can be observed. By authenticity, I refer to the lack of hyperrealism and the connection with the genuine. Unlike the previous recording, this one shows a distance from hyper-realistic

theatrics, and focuses on the song, the audience and the moment. The performance seems to be more relaxed and more familiar. The audience can get a sense of who Coldplay are as people, as the stage in smaller, the location is smaller and there are no theatrical distractions. The audience are reminded that Coldplay are not just big world-renowned stars, but they are just like the rest of us. In this recording, you can see Chris Martin sing the words that the audience are hearing in that very moment. There is no reason to think there is any play-back technology involved. One can observe the drummer Will Champion feel the beat from within. These authentic aspects are also somewhat noted in the previous performance, but this time, there is an extra feel of familiarity which further connects them. For example, in minute 1:58, Chris Martin can be seen leaning on and hugging guitarist Jonny Buckland. A smaller location such as The Citadel in Amman allows for the concert experience to feel more genuine and to blur the distance between the audience and the artist. Likewise, the performance is a clear example of authenticity as the original recorded song sounds different to the performed song.

This is a concept discussed extensively by Philip Auslander in his book *Liveness: Performance in a Mediatized Culture* (73-96). He suggests that, "seeing is believing" (85). This is especially true when a consumer has previously listened to a recording of a song, for instance via CD, and then watches the artist perform the song live. If authenticity is present, and there are no technological replacements of the song, the audience will notice a difference in terms of tune, melody or even the words sung. When Chris Martin is running around the stage, he will likely become out of breath, and the audience should be able to notice this.

One more aspect of this recording that proves the time and space in which Coldplay are performing is the presence of plentiful numbers of mobile devices, being used to record the performance. This can be considered and seen as one of the negative consequences of

digitalisation. The viewers, while developing 'FOMO', also known as a fear of missing out, and an increased presence on social media, has left behind the ability of just enjoying the music being performed in front of them. Instead, they have developed a need to share and record what they are seeing. It is likely that these recordings will only be re-watched a couple of times and then forgotten about, or even deleted.

When applying Pine and Gilmore's five design recommendations, a difference compared to the previous performance can be observed. Although there are no negative cues, there are no obvious positive cues either, which are essentially meant to tie in with the overall theme. The theme in this case is much different to the large performance but present nonetheless. However, the theme is not now connected with an album or tour, but the location in which this particular song is performed. The memorabilia suggested by Pine and Gilmore are also not present as there is no clear visual cue connected to the band throughout the performance, which would then connect to memorabilia on offer. Moreover, only 3 of the 5 senses are engaged and in contrast with the previous performance, are not as intense. Although the auditory sense is of course prominent, the visual senses are not heightened as they were in the more theatrical performance before. In fact, not many colours are used at all in this performance. There is a lack of theatrics and hyperreality, disapproving in this case my prediction.

Furthermore, the costume used is more neutral, tying in with the location of the performance. Again, the camera captures bird's eye views of the audience, which is much smaller than the previous video. The angles used in this case are mostly high or low, emphasising the members of the band but also focusing on the audience.

In comparison with these recent performances, when analysing a recorded live performance from an earlier stage of Coldplay's career, for example in 2009, everything

seems to be lessened. Coldplay performed their hit 'Yellow' live in Austin City in what seems

to be a very small interior venue. The video starts with Chris Martin introducing the song.

The camera zoomed in on him with his guitar and a background of yellow lights, whether or

not this is intentional or just the lights used at the time is unclear. The video then moves to a

bird's eye view of the band on stage. The stage is much smaller than those observed

previously, even more so than The Citadel. The band members all wear black clothes, which

is also not often seen in more recent performances. The act as a whole is simplified, with the

camera often moving in closely on the members playing their instruments. In fact, a lot more

close-ups are used. Longer shots are also implemented in this video, instead of the many

different perspectives used in more recent recordings. The camera moves from left to right

but does not often change shot. Also, the audience is not recorded nearly as much as in recent

recordings. If the 5 design recommendations from Pine and Gilmore are applied, as in the

other recordings, no theme as such can be observed. Visual senses are not intensified, neither

are touch, taste or smell. The hearing sense of course remains activated as in any recording of

a musical performance. There are no particular positive cues harmonising impressions,

neither are there negative cues. There are no particular uses of colour, backing visuals or

confetti. The second recording, although only using the colour lilac still suggests and overall

more upbeat and happier feeling in contrast to this third video. Of course, this could be solely

a decision based on the song chosen. Other differences observed are the movement of Chris

Martin himself, as he is no longer jumping from one side of the stage to the other but mainly

dancing in one area of the stage, or at times barely even moving. The audience cannot be seen

with smartphones creating recordings of the show and the overall tone of the performance in

terms of brightness, seems darker. The audience seems to be much smaller than that of 'A

Head Full of Dreams' tour, of course this is also likely due to the popularity of Coldplay now as opposed to 2009.

Moreover, a video uploaded in 2009 of another hit song 'Clocks', also performed in Austin City, shows many of the same features as the previously recorded song. Of course, this is because they are two songs performed on the same night. However, I find it necessary to make note of this video as the song 'Yellow' from the previous video is somewhat a slower song than the previous ones analysed. Therefore, for stability in my analysis, I have decided to further analyse a couple more videos. Firstly, just like 'Yellow', the 'Clocks' performance does not have a specific theme, the costumes are all in black, the camera makes use of close ups, often on instruments or on Chris Martin's mouth, noticing him sing. Again, bird's eye view shots are used and low and high angles. The lighting remains yellow, which disproves my intuition that the previous video had yellow lights harmonise the song title 'Yellow'. The overall lighting again is quite dull. There are subtle green and blue hues. There is little movement from the band members around the stage. They mostly just stay in one spot, playing their instrument or singing. There is no real spectacle. In similar ways to the previous video. The five design recommendations for a memorable experience have not been achieved as there is no particular theme, positive, and there are no visible memorabilia. A camera man in front of the standing audience can be observed a number of times throughout the recording, which can result in a negative cue for the audience, as it will distract them from the experience. Similarly, the 5 senses have not been engaged, except of course the auditory sense. Despite the song being much more upbeat and cheerful, the performance lacks theatrics and hyperreality. An interesting moment is in minute 4:09, the audience can be seen standing, clapping, dancing and singing. The cameraman can also be seen at this moment, with his back to the audience but separating the stage and the audience with his equipment.

However, there is not a smart phone in sight. So, even though this performance does not meet the requirements by Pine and Gilmore to be a memorable experience, there is a refreshing aspect to it, as the audience is just watching and enjoying the experience instead of pulling out their smartphone to record it.

Furthermore, when we take another recorded performance of the song 'Clocks' from a later year, certain differences to the previous analysis can be observed. The following findings are based from a video recording of Coldplay playing 'Clocks' in Los Angeles at the Ghost Stories Arena in 2014. However, this video was not uploaded to Coldplay's official YouTube channel and has been taken by a user called Wasef IM as a recording could not be found on the band's official page.

The video begins dark, with small lights from the back of the stage. If follows up with a bird's eye view of the circular stage and as the music begins, red lights begin to shine. Other LED light beam into the audience. The colour red remains prominent, much like in the very first video analysed. The use of the camera has also changed, with more shots including the space around the band and the stage, involving the audience in the overall ambiance. The band members remain to wear black or dark clothing and do not move around the stage much. However, the use of lights is much more observed than in the videos recorded in 2009. As for the 5 design experience recommendations discussed in all of the previous recordings, not all have been achieved. There are no visible memorabilia or positive cues tying in a theme. The general theme also remains somewhat unclear but there are no negative cues distracting the audience either. The senses of touch, hearing and visuals are engaged. Taste and smell not so much, I assume. When comparing this video to the first video, corresponding to their recent tour, there is still many differences and it lacks certain theatrical

aspects. However, when comparing it to the videos before 2010, the overall experience has become much more engaging and entertaining, in my opinion.

In 2012, Coldplay performed live in Paris, and although I could not find a video uploaded of this performance to their official YouTube channel, I have analysed the performance of the song 'Yellow' uploaded by TNP in 2013.

As in other recordings, the video begins dark, with subtle tones of light, this time the colour yellow beams down directly upon the band members on the stage. Visual images are implemented to the back of the stage and the audience are shining in blue hues. The focus moves to Chris Martin, playing the piano, this time not dressed in black but his recognisable blue t-shirt on top of white long sleeves. Bird's eye view shots are used to show confetti on the stage floor and the size of the audience. More shots are observed focusing on the audience's reactions and emotions, often in the form of close ups. This time, the audience can be heard singing along with Chris Martin as he begins the song singing solo, with little instruments in the background. After 2 minutes and 30 seconds, Chris begins playing the guitar and the rest of the band members join in, creating the well-known melody to the song 'Yellow'. Then, 10 seconds later, Chris Martin speaks directly to his audience, counting down the seconds when the song will really begin. And in minute 2:42, yellow lights shine over the whole venue, backing visuals are amplified and the crowd go wild. The camera picks up many different perspectives of the audience, stage, venue and band members. Some smartphones can now be observed among the spectators. Chris Martin asks the audience to sing with him, engaging them in the performance. Although not as theatrical as more recent performances, especially those from 'A Head Full of Dreams' tour, there is a significant difference compared to previous recordings. There is also an extension to the stage, which Chris uses to dance along and sing closer to some of the audience, he also includes

"everybody in the back" (4:56). Colours are used much more in this recording than previous ones. Close ups of the drummer and guitarist are seen on huge screens at the back of the stage and it becomes clear how popular Coldplay is in this Paris venue. The audience in much larger than previous performances. Memorabilia is now more observed, with the use of images, costume and even the painted piano on stage, which remains in their concerts today. Auditory, visual and touching senses are engaged. With the vast audience and movement of Chris Martin, the smell sense might also be engaged as it is likely people are sweating in this closed space from all the dancing. The taste sense remains unclear. Positive cues harmonise the overall theme, which is much more established than in recordings before this time. Overall, the 5 design experience recommendations by Pine and Gilmore have been identified and I can therefore assume this experience to be a memorable one. Hyperreality is also employed with some of the visuals used in the background. Theatrics are much more intensified than previous recordings.

I conclude that Coldplay have proven over the years to be a world class act and an enchanting experience for anyone to attend. Differences in experience designs can be clearly observed, especially when applying the five design experience recommendations explained in the theoretical framework in chapter 3. Also, the video recordings prove that over time, Coldplay have created an experience that is well absorbed by their audience, which ties in with Pine and Gilmore's testimony that attending a concert or festival would fall somewhere between the realm of passive participation and the realm of absorption. However, I do not fully agree with this statement as, in my opinion, attending a concert does not necessarily depict passive participation. In fact, as consumers of live music performances, we ourselves decide to actively participate in the experience by purchasing the concert ticket, attending the performance and concentrating all our efforts and senses on that very performance. However,

there is a difference worth noting in terms of active or passive participation. It is not the same to listen to the performance, as it is to simply hear it. Philip Auslander proposes a good example in his book *Liveness: Performance in a Mediatized Culture.* He states that with incorporating technology in formats such as large screens, "the spectator sitting in the back rows . . . is present at a live performance, but hardly participates in it as such since his/her main experience of the performance it to read it off a video monitor" (25). In the case of musical performances, one sometimes has to watch everything from the large screens as they can be too far away from the stage. This often happens at large concerts from big stars such as Coldplay. In this case, their participation may be passive but at the same time, the spectator chose said space and chose said concert, resulting in an active participation.

The ability artists have to engage their audience and allow for participation possibly helps intensify the theatrical aspect of a performance, which could then contribute to making the experience all that more memorable. Furthermore, my prediction that live performances are more theatrical and engaging today, as well as the presence of some aspects of hyperreality, is only partially true. Although more engaging, Coldplay does not make as much use of hyperreality than I predicted. The theatrical feature is applied to larger performances, especially those from the year 2012 and onwards, which confirms that, from a certain perspective, Coldplay concerts have changed overtime. Coldplay would have possibly depended highly on the revenues from these live performances as physical recorded music would have likely been responsible for a smaller portion of their income than live performances. Of course, it is important to acknowledge that Coldplay formed their band in the late 1990s, specifically 1996, so their popularity has also grown over time, which could have also contributed to the reason behind their performances becoming more theatrical and well designed in terms of becoming memorable for the consumer.

Additionally, the videos chosen in this analysis are of different songs which could have created certain limitations as they are equally of different styles; slow, fast, sad and/or cheerful. This is mainly due to the availability of what Coldplay themselves uploaded to their channel as I wanted to remain consistent in where the videos were sourced. For that reason, only two videos not uploaded to Coldplay's official channel were used. Another limitation worth mentioning is my own personal interest in Coldplay. As a result, there could be a certain degree of bias applied. Still, from my own experience, having visited multiple concerts in the last few years, Coldplay will undoubtedly remain one of my most memorable and entertaining musical experiences and although they have decided not to tour their new album, there will be a demand for their live music for years to come.

4.2.2. Case Study 2: Oasis in Concert

As Coldplay gained their popularity in the midst of the digital era, I thought it wise to complement my analysis of live music performances in a concert context with the examination of live performances from bands that were formed at an earlier date than Coldplay, to help give an overview of live music evolution over time. Therefore, I have chosen to use Oasis as an example, as they too are a British band. Oasis originally formed in the early 1990s when two brothers; Noel and Liam Gallagher came together as one act. Like Coldplay, they concentrated their music on a rock-pop genre. However, Oasis split in 2009 and have made only a few appearances since then, most of which have been by one of the brothers alone, and they rarely sighted together. Therefore, I have chosen to compare four videos, all of the same song: 'Don't look back in anger', which is one of their most-known songs. The recordings are from the years 1996, 2000, 2009 and 2018. The last video analysed is actually from a festival setting instead of a concert setting, in which Noel Gallagher

performed the song, without Liam. Although this does not fit in my ideal performance criteria for analysis, I feel it is needed to see a performance from after 2010 in order to see if in recent years live performances are more theatrical and if they intend to intensify the live music experience for the audience. This time, the videos are not sourced from their official YouTube channel as there is a scarcity of live performances on their channel and therefore the videos have been chosen from a wide range of different YouTube users.

Starting with a live show from 1996, a video was uploaded by the user rgmu101 in 2010 of a live Oasis performance in Manchester, England. Like other video recording in the 90s and early 2000s, the overall lighting is somewhat dull. Hues of blue, green and yellow can at times be observed. The camera, again, focuses on close ups of the performers and their instruments. Low and high angles are used throughout, and few shots of the audience, which appears to be quite large, can be observed. The shots that do include the overall venue, show the stage as a relatively large space, which is not colourful. The performers remain in their assigned space, sometimes not even moving their legs. Although the audience can be heard singing along with the band, there seems to be little engagement with the spectators. Of course, no smartphones can be seen. As for the 5 design elements applied in the Coldplay videos above, I would conclude there is no particular theme present. Visual, hearing and touch senses are engaged, as in many of the performances analysed. As mentioned, there is no particular set theme, just one visual image in the background, and a positive cue relating to the United Kingdom with a painted flag on the singer's guitar. The audience have a red tone of light shining above them. The performance as a whole is, in my opinion, lacking the entertainment aspect that many live shows present, and I do not see many connections with the 5 design recommendations by Pine and Gilmore, which would suggest the experience isn't that memorable.

Continuing with the video from 2000, in which Oasis perform live in Wembley, uploaded again by the user rgmu101, a few differences can be observed. Beginning with one of the brothers introducing the song under a relatively bright red light, the video then shows neon yellow lights, in the shape of cubes, which is portrayed on the screen at the back of the stage. The lighting has now become much brighter, in comparison to the previously reviewed video. The audience can be seen singing, dancing and clapping their hands. The audience is much larger than the first few Coldplay concerts analysed, of course by then Oasis had been around for nearly 10 years and established a large fan base. This video makes use of many shots of the audience to show their engagement and participation, as well as their size. A total of three screens can be seen on stage, all showing bright coloured neon lines. The visual sense is heightened here compared to the previous video. There are more lights used, shining beams in different directions. The camera continues to make close ups of the performers and their instruments. However, the footage includes the audience much more than the previous video. Aside from being more theatrical, the performance has definitely intensified and more of the design recommendations by Pine and Gilmore are observed. In fact, I believe this experience would have been a very memorable one.

In similar ways, a video uploaded by headshrinker666 of Oasis' live performance in Argentina from 2009, shows subtle lights shining on the stage. The video analysed is from Oasis' full concert in Argentina, and in the 76th minute, one of the brothers engages with the massive audience and introduces the song 'Don't look back in anger'. This is the first time I have observed the band engaging actively and directly with the audience. In fact, in the 78th minute, only the audience can be heard singing the chorus of the song, as the performers themselves stand back and listen. This allows the audience the chance to participate more actively than previous performances by Oasis. The audience can now be seen holding up their

smartphones. Furthermore, four screens complement the stage with large visuals and neon lights. The performers move around the stage more so than in the video from 2000. The overall performance seems to be touching and emotional, more so than the previous videos of the same song. Although I do not detect a main theme to the performance, I would suggest it to be considered memorable in terms of the 5 design recommendations applied as there are positive cues, by including the audience and talking to them directly in the 76th minute. Also, there are no negative and distracting cues and the hearing, visual and touching senses are engaged.

Finally, the live performance from 2018 at Rock Werchter uploaded by lllukplah M shows Noel Gallagher centre stage, performing the hit song. This time however, there is a very noticeable overall theme, which is the rock festival itself. Positive cues such as his costume and the mise-en-scene on stage tie in with the theme and all five senses are engaged. The audience can be seen drinking, dancing and singing along. In fact, the audience is shown much more in this video than in previous ones. The stage is very large, with one massive screen with moving visuals and two large side screens showing parts of the audience and the performers. Again, the spectators are invited to sing along in the place of Noel for the chorus. However, Noel does remain static in space and does not engage as actively with the audience as in the previous recording. The video does support the 5 design recommendations and could be considered a memorable experience. However, I would have expected there to be more theatrics present as it is an experience from 2018. Although, the lack of such theatrics could be simply a consequence of the context of the performance, as it is part of a festival show and not a specific concert of Oasis or Noel Gallagher. Hyperreality is not observed. What the audience see seems to be what they hear, in real time and with no technological distractions.

There are no cues that suggest a distance from reality as the experience is considerably familiar.

Therefore, I conclude this segment of analysis by suggesting that, again, my predictions have only been confirmed partially. Although I stand by my statement that live music performances have changed over time as a direct consequence of digitalisation, specifically in regard to file sharing and the rise of streaming services, in order to fully confirm my initial prediction that performers resort to unrealistic features or hyperrealism, further research must be carried out. Theory suggests that due to digitalisation and technological innovation, hyperrealism in live performances is very much a possibility.

Although the case studies chosen in this section have not directly reflected this, I do not reject my prediction. Furthermore, my analysis shows that the live performances chosen, do not directly reflect a specific use of storytelling, which also contradicts one of the aspects of my initial prediction. Again, further research and analysis should be carried out to prove this. Nevertheless, the analysis does suggest that performers are trying to be more engaging and create a more memorable experience for their fans, which ties in with the theory of experience economy by Joseph Pine and James Gilmore.

Moreover, evaluations done so far may imply that an artist's intentions of creating such an experience are directly related to the consequences of switching business models in the music industry in general. As they no longer receive significant revenues through recorded music sales, they have become dependent on the success of their live performances and therefore, over time, these performances have becoming more engaging and theatrical. This conclusion is applicable to live music performances in a concert context and it may differ for a festival context, as the overall experience, participation and expectations may

differ. Therefore, I will follow up with an analysis of live performances from a festival context to establish a deeper understanding of live music from different perspectives.

4.2.3. Case Study 3: Glastonbury Festival

Mahita Gajanan recently wrote an article for Time magazine in which she discussed the experiences people undergo at music festivals. She states that in the past decade "music festivals have grown into a major money-maker", including both, the larger ones known world-wide, with high-priced tickets and multiple stages, as well as the smaller, more niche festivals that are more genre-specific (Gajanan). In fact, Coachella, one of the most popular music festivals in the US, grossed over 114 million dollars in 2017, according to Dave Brooks and Billboard. Furthermore, Gajanan confirms that as record sales declined in the early 2000s, artists "began depending on touring to earn money". She also states that the majority of "the touring schedule for a band like the Offspring . . . now consists of festival performances". In fact, three quarters of the Offspring's overall live performances are at music festivals (Gajanan).

In the previous section, I found that live music performances in a concert context have, in some ways, been affected by digitalisation. I found that there is an increased use of pyrotechnics, light shows and overall theatrics. Therefore, if the live music festival industry is also on the up, similar conclusions are likely to be made. I have focused the upcoming section of this thesis, which coincides with the last case study to be analysed, on the British contemporary music festival named Glastonbury.

Glastonbury has, in its own way, become part of the UK's music culture. Every year, the festival is broadcast on national television. According to their official website, the festival began one day after Jimi Hendrix's death in 1970. There was an overall attendance of 1.500

people and the price of entrance was set to one British pound. A year later it was called the

Glastonbury Fair and due to its free entrance, around 12.000 people attended. It was a few

years before the festival would reappear. As from 1979, the festival became an annual

tradition. However, every five years, the festival takes a break and allows for the ground in

Somerset, where it is held, to "recover from the excessive stomping of the thousands of

festivalgoers", which is known as a fallow year (White).

Over the years, Glastonbury has increased in popularity. In 1995 it reached an

attendance of 80.000, in 1997 a total of 90.000 and in 1999 it increased to 100.500, showing

a slow but steady increase in popularity. The year 2000 saw similar numbers but in 2002,

coinciding with a time in which artists needed live performances as their main revenue after

suffering from the recent losses in record sales, the number of attendants pushed to 140.000.

In 2005 it was already at a capacity of 153.000. Now, in 2019, Glastonbury has reached its

highest ever capacity at 203.000 people, of which most tickets sold within the first 30

minutes of being on sale ("The History of Glastonbury Festival").

In order to evaluate the changes in live performances in a festival context over the

digital era, the same methods of analysis applied in the previous case studies are applied.

However, official video recordings of the festival uploaded to YouTube only date back to

2010. Therefore, a number of video recordings uploaded by other users have also been

analysed.

Beginning with a video uploaded by soulbrotherjimmy in 2013, shows a live

performance by REM at Glastonbury in 1999. As with other videos analysed previously from

similar years, the lighting is not bright, but more mellow and dull. The colours red and yellow

are used frequently. The lights do not often change, the audience seems very large, but mainly

left in the dark. The band members remain static in place on a relatively small stage. This

short video shows a few figures made out of lights on a black screen at the back of the stage. The instruments remain in the dark and only spotlights shine upon the members of the band. When reviewing the 5 design recommendations by Pine and Gilmore, positive cues and an overall rock theme can be observed. Auditory and visual senses are engaged, as well as touch, as due to the size of the audience there is likely to be some pushing and touching. There are no fireworks, lights beaming into the air or major theatrics used. In comparison to videos analysed of its time, there are very few differences.

Similarly, a video uploaded by ScottishTeeVee of The Creatures' live Glastonbury performance in 1999, shows the same tone of lights, although this time less noticeable as the performance is carried out in daylight. This time however, the main artist is moving around the stage a little more. The other band members are also clearly in sight. The artist introduces her songs to the audience, engaging them lightly in the performance, However, there remains to be a lack of theatrical performance. For a rock band, one would expect perhaps more energy and engagement with the audience. In fact, at times, the audience can be seen not pushed together but with some space between them, which many festivalgoers walking passed. Nevertheless, the crowd is excited with the performance. There appears to be no lip-syncing by the lead vocalist, and the blond drummer can be seen clearly playing his instrument, disproving any hyperrealism. However, it is difficult to get an overall view of the stage and the hyper-realistic conditions that may be features as the camera focuses mainly on the band members with close ups and seldom shows an overall ambience shot.

Moreover, in a later year, a video uploaded by Mayra Colatto of a performance by Artic Monkeys in 2007 shows a much different environment. The video shows a much larger stage, with many more lights. This time, these lights are flashing on and off, creating more energy and suspense. The audience remains dark and once the band is on stage, in minute

1:22, a much brighter stage can be observed. The audience immediately start singing when

Alex Turner, the lead singer of Artic Monkeys, stays quiet. The audience can be heard loudly,

and Alex Turner talks to the audience to introduce the following song. Many more lights start

shining. In fact, the original filmmaker, almost certainly from BBC due to the logo observed,

has included a note on the visual warning about "strong lighting" in minute 3:13. The

audience can be seen jumping up and down and filming the performance from their phones.

From a faraway camera, the stage appears as a large white lit up ball. The theme is consistent

with the festival, with flags and decorations. The camera focuses both on the band and the

audience, as well as the overall festival experience from afar. The light show and movement

of the band members give off a more energetic and theatrical performance. Auditory, visual

and touching senses are engaged. Following Pine and Gilmore's recommendations, the

experience is likely to be a memorable one.

In 2010, an official video of the event uploaded by BBC shows Gorillaz performing

live. The band members can be seen straight away singing and moving around the stage, with

a large screen with moving visuals behind them. The members of the band playing

instruments can clearly be seen in a red hue of light. The audience appears to be very large,

and even flares of fire can be observed at the sides of the stage. Although, not many lights are

used, the large screen on stage keeps to audience highly engaged. There is also a large signed

spelling GORILLAZ in the back of the stage, tying in with the theme of the performance. The

colours red and blue remain prominent, possibly as a positive cue to the UK. The overall

performance follows many of Pine and Gilmore's recommendations. Some theatrics can be

observed, with the screen, fire and lights. A sense of authenticity is also present as Gorillaz is

essentially a virtual band and are often not seen in person when performing. This time,

however, all of the band members can clearly be seen, revealing the voices behind the recorded song.

Later, in 2013, a performance by Noah & The Whale was uploaded by BBC. Performing in daylight, the band received a large audience. The camera focuses both on the artists and the audience. The audience can be seen holding flags from different countries, confirming the world-wide popularity of Glastonbury festival. There are two large screens on the side of the stage, however, not many lights used, of course this is likely because the performance is done during the day and the lights would not be well seen. Only some can be observed at the top of the stage. Nevertheless, the large monitor at the back of the stage has not been put to use, which could have helped theme the overall experience. The senses, as always, are engaged. The performers do not make much use of the space on the stage and remain static during the act. Although, the genre fits more with indie-rock than rock or hip hop like the other bands analysed, there is an overall lack of energy and theatrics. In fact, previous analysis would suggest that much more could be done with a performance of this nature. Nonetheless, the costumes among the members are coherent and consistent with the overall theme. The audience is not jumping or singing, and the artists do not pause to include the audience and engage them.

In 2019, Robicolle uploaded a copy of the original video recording by BBC of Radiohead's Glastonbury 2017 performance. This performance was done at dusk and as the band members can be seen coming on stage, with no lights pointing them out, the crowd become very loud. Radiohead performed a live show that lasted around two hours. They started with their song 'Daydreaming'. The song begins with one of the keyboardists playing solo, with a slow entrance of a guitar. Lights remain off and suspense is heightened. Such suspense and attention on one of the members creates an environment in which the audience

can feel more engaged. Thom Yorke begins singing, still with no lights or any theatrical elements present. Three minutes in, a subtle white light show begins on the screen behind them, getting brighter and brighter, as the keyboard and guitars intensify. A show has officially commenced. Although the song is relatively slow for a rock band, there is a sense of calm, also among the audience, who are filming with their phones. The camera mainly focuses on the keyboard player, the guitarist and the singer, and seldom shows the audience. In fact, the audience is only shown from afar, as to give a sense of feel to the environment as a whole, but no faces among the audience can be recognised. Seven minutes in, Radiohead start their next song, with a much brighter backing, possibly too bright to even show the band members. This could be considered a hyper-realistic feature, as music can clearly be heard but it is hard to depict the artists or the origins of said music.

Later in the video, around minute 39:00, Yorke begins to talk to the audience, with no backing music or noise. He welcomes the crowd to Glastonbury and talks to them for about 2 minutes. During this time, he begins to play tunes from a keyboard, some off key even. Again, this returns authenticity to the performer and distances them from hyperrealism. After playing different keys and tunes, the song 'Everything in its Right Place' is slowly introduced. Again, many bright lights behind them, blurring the distance between the stage, the performer, the music and even the audience. This is a true contrast between authenticity and hyperrealism. The performance continues to blur these lines throughout the two-hour performance. Following the recommendations by Pine and Gilmore, this experience is likely a memorable one, as the senses are engaged, there is a general rock theme with positive cues and a lack of negative ones. The energy given by the performers and the lights used is also transmitted to the large crowd and can be heard through their excitement.

Similarly, in a video uploaded by BBC of The Killers' live performance this year, the final video used for this analysis, a bright light show can be observed. Starting with beams of neon green and blue lights, the show continues with flashing purple lights. The camera makes use of close ups of the artists, as well as long shots of the audience, the stage and the surrounding grounds. Gigantic screens on either side of the stage show the performers up close. Brandon Flowers, the lead vocalist of the band, moves constantly around the stage, jumping around and giving off immense energy. Fire flares are also observed in the surroundings. Brandon Flowers invited the audience to sing along by pointing his microphone in their direction, which can be seen in minute 1:44. The artist engages the audience well and can be seen in minute 2:08 laughing with the guitarist on stage, showing that he is also very much enjoying himself. The neon beams shine on the audience in different colours. Authenticity remains as when Brandon is out of breath, he cannot sing and this can be clearly heard by the audience, eliminating hyperrealism from this perspective. In minute 3:16, very bright lights shine upon the audience, as they sing along with Flowers. Flowers continues to invite the audience to sing, without even having a microphone in hand. The guitarist and drummer show an impressive instrumental talent while the crowd goes wild and Flowers applauds his fellow band members. More and more lights shining, in every direction continue to beam. The drummer and guitarists continue playing alone for almost one minute, with lights flashing to the rhythm of the drums. When they finish their instrumental sequence, the drummer stands up and shouts loud. The energy is transmitted across the crowd. The lights tie in with overall rock theme, and positive cues can be observed. Memorabilia is missing but all senses are engaged. At the very end of the performance, the drummer launches his drum stick into the crowd, engaging them to the highest level and the audience in that area will like push around and try and reach it. This also

gives that extra edge in terms of memorable experience as it includes a surprise factor for the fans at the end of the performance. All of these aspects undoubtingly suggest a memorable experience, with a high theatrical level. However, hyperreality again remains to be seen.

The videos above were chosen for analysis as they are all of similar genres and are of bands and not solo artists, to keep the analysis as consistent as possible. Ideally, performances of the same artist over time would have provided the best results for analysis. However, this could not be carried out as a festival such as Glastonbury seldom repeats artists, or at least not for a few years. Additionally, due to the timeframe reviewed, many of the groups that performed either decreased or increased in popularity, or some have retired altogether. For future exploration, I would recommend a single artist or band to be analysed from a variety of different festivals, to confirm results achieved in this study.

Nevertheless, my predictions remain partially confirmed. Over the past 20 years at Glastonbury, there has been an increase in movement on stage by the performing artists, and the general festival themes have been present but have undoubtingly intensified overtime. Furthermore, there has been an increase in audience engagement and participation. The first acts reviewed infrequently addressed their audience, but the later acts spoke clearly to them. More visuals are also observed in the later videos, as there has been an increase in the use of backing screens and monitors. Similarly, light shows have also intensified and increased. Lights from the earlier recordings show more mellow and dull tones.

Overall, the five design recommendations are mostly applied to performances from 2007 and onwards. Again, few aspects of storytelling are noted, as well as a lack of hyper-realistic conditions.

4.3. Conclusion Chapter 4

This final chapter has been dedicated to the analysis of live performances. By employing visual and film analysis to video recording of live music performances uploaded to YouTube, a number of consistent conclusions can be made. Firstly, the British band Coldplay has shown that over the years, they have become a highly entertaining experience to attend. The earlier recordings of the band show a frequent use of dull tones and lights, as well as relatively small audience. As the audience increases, so does the intensity of their performances. When applying the five design recommendations for an experience by Pine and Gilmore, explained earlier in chapter 3, Coldplay tick almost all the boxes. They engage well with their audience, create an energetic atmosphere and make decent use of technologies on offer such as light shows. However, Coldplay became a popular band in the midst of the digital era, which could open the case study up to limitations. It is possible that the improvements in their live performances have not been a consequence of technology and digitalisation, but simply a result of their increasing popularity. Either way, significant differences can be observed in the timeline of videos chosen. Yet, my predictions of increased hyperrealism and storytelling have not been proved.

Similarly, despite Oasis splitting up in 2009, similar conclusions can be made from their live performances from 1996 to 2009. The evolution of these performances shows an increase in audience engagement and participation, as well as an increase in light shows. However, the timeframe of this case study could possibly pose as a limitation as my predictions were only partially confirmed. Storytelling in these performances seems to be scarce, as well as any hyper-realistic feature. In order to fully research this aspect, live performances should be analysed from 1995 to 2019, from a single band.

Moreover, live performances from the British festival Glastonbury were also reviewed. Festivals have proven to be increasing in recent years, as artists continue to feel the need to fill their lost recorded sales revenue with incomings from live performances. Glastonbury's attendance and popularity have increased dramatically over the years, nearly tripling from 1995, and today can be considered an integral part of the British music scene. Just as observed in Coldplay and Oasis' videos, the evolution of live performances in a festival context have shown an increase in the use of light shows, pyrotechnics and audience engagement. The five design recommendations by Pine and Gilmore have also been increasingly noted in the later performances.

With this analysis, I have finalised my research in the ways in which digitalisation has influenced the live music performance industry and in the following section, an overall conclusion of the matters discussed can be found.

Conclusion

This thesis has answered the research question "In what ways has digitalisation, specifically file sharing and streaming services, influenced the live music performance industry from 1995 until now?". Therefore, it has studied the impact of digitalisation on the music and live performance industry. In an attempt to simplify the understanding of said impact, multiple scholarly texts and theories have been examined, and case studies have been analysed.

Findings suggest that traditionally, artists relied on recorded music sales as their primary economic revenues. Additionally, they gained money through music licensing and advertisements, as well as tours and live concerts. However, in 1999 Napster was born. It would soon become a worldwide used platform for file sharing and illegal downloads. As a

result, record sales plummeted, and artists suffered a great loss in revenues. Many more file sharing platforms would follow and disappear as they faced many court hearings for aiding the illegal distribution of music. Artists had to rethink their economic strategies and the traditional music business model transformed, as well as the industry as a whole.

With the birth of streaming services, a recovery of the music industry is in reach. Theory suggests that although streaming services are of great importance to the music industry, artist revenue remains low. Therefore, a short survey was conducted to establish if consumers would likely pay more for their streaming services if they were aware of the low revenues. Findings show that consumers were often unaware of the amount paid to an artist by streaming services and despite this, they would not pay more for the service. Nevertheless, it is important to note that streaming services have become so fundamental for the survival of the industry, that without them, consumers would likely return to illegally downloading music, essentially harming the artist even more. Therefore, a coexistence of streaming services and live performances is central to an artist's livelihood and results in a sustainable music industry.

Consequently, artists have recently diverted their efforts as live performances become their primary incomes. This has resulted in the increased popularity of live concerts and festivals we see today. Live performances are no longer a promotional tool for an artist's recorded music as they once were. The traditional strategy has flipped entirely, resulting in recorded music becoming a promotional tool for live performances. Therefore, if live performances now have the grandiose task of being the primary revenue for an artist, I predicted that they must be different from twenty years ago. In fact, due to digitalisation and technological innovations, I suggested that live performances now must be a much more theatrical experience than that of two decades ago.

Additionally, I expected storytelling to play a pivotal role in a live performance as it has the possibility of aiding audience engagement and participation. Furthermore, Jean Baudrillard's theory of hyperrealism was translated to a live music performance context and was considered. As technology advances and digitalisation exceeds itself, hyper-realistic features in performances are very much a possibility. Examples discussed in this thesis include Ed Sheeran and Tash Sultana's use of the loop pedal in chapter 3. These predictions were supported with theories by, the as mentioned Jean Baudrillard as well as the theory of experience economy by Joseph Pine and James Gilmore. In their book, explained in chapter 3, they discuss the importance of experiences in our society, and how during the start of the twenty-first century, consumers have distanced themselves from materiality and focused on experiences.

Moreover, Angela Jones and Rebecca Bennett discuss in their book *The Digital Evolution of Live Music*, the changes observed in live music consumption and demand. These three theories mentioned were considered as a basis in the formulation of the theoretical framework for this research. Visual and film analysis have been considered in addition to these theories to create an analytical lens through which three case studies could be examined, which partially confirmed my initial predictions.

First, the British band Coldplay was examined over a period of 11 years. The reason for not going further back in time was simply due to the availability of video recordings of live performances on the commonly known platform YouTube. My findings suggested that, as predicted, there was an increase in theatrics in the different performances over the years. Light shows have become more frequent and can aid in the intensification of a live experience. Similarly, audience engagement has also become more frequent in recent years. However, storytelling and hyperrealism were not observed. When applying the five design

recommendations by Pine and Gilmore, the performances corresponding to the second decade of the twenty-first century can be considered memorable.

The British band Oasis was also reviewed. This time the timeframe covers previous years, specifically from 1996 to 2009. Although, a video recording of a live performance from 2019 was also included. However, the band did not perform as a whole but only Noel Gallagher was present. Nevertheless, the findings suggest that in 1996, audience engagement was low, as well as the use of light shows and technologies. The five design recommendations were slowly incorporated over the years, but hyperrealism and storytelling remained to be lacking.

For a different perspective, the last case study would not fall under a concert context but would consider live performance changes from a festival point of view. The British music festival Glastonbury was then examined. The findings for this case study were consistent with those of the previous case studies. Audience engagement slowly incremented, as well as the use of light shows and pyrotechnics. The sense of a theme became stronger over the years and when applying the five design recommendations, theory suggests the performances became more memorable. However, storytelling and hyperrealism, again, were not observed.

Despite not all of my predictions being confirmed with this analysis, I stand by my statement that digitalisation, the Internet and file sharing have had an important impact on live performance evolution. Furthermore, it is important to note certain limitations to this study such as personal bias and experience. Additionally, although high efforts to remain consistent in analysis were made, the case studies could have been more carefully chosen. Due to the availability or scarcity of videos available online, some analysis has been difficult.

Furthermore, future research might benefit from analysing a single artist or band that has been popular and touring live since the 1990s and continues to do so. This would give a

better overall view. Similarly, the chosen artist for future research should have performed in a number of different festivals over the years in order to complete the analysis. Also, interviews with professionals working in the field over the past two decades could also prove a beneficial addition. This was intended for this research project but due to time limitations could not be carried out.

Nevertheless, this research has allowed for a critical evaluation of a number of theoretical concepts and texts and suggests that for the near future, artists will have to continue to rely on live concerts as their primary source of income, as well as music licensing and promotion through streaming services. It proves to be a first step in understanding live performance evolution and how digitalisation has contributed to said evolution. As the industry evolves in a society that is increasingly more aware of environmental issues, a possible next step is not simply live performances through concerts and festivals but the live streaming of these performances.

If a saturation of live performances presents itself, live streaming could be the answer to an industry that is great for the well-known, but immensely unfair for the starting artist. However, increased digitalisation does not always mean a negative result. Another interesting factor worth noting is the influence of social media. Despite the negative effects of digitalisation in the music industry, there have been complimentary features that allow the artist to connect better with their fans. Thanks largely to social media channels, musicians can promote their products via the Internet essentially for free. This also brings into play the interactive feature of the Internet. Some artists incorporate fans voices into their recorded songs, allowing for an even higher audience engagement and participation than in a live performance.

Finally, I note that in such a rapidly moving sector, it is unwise to offer any definitive predictions. Therefore, this paper has the purpose of outlining as clearly as possible the parameters of the current debate. Ultimately, what remains true is the power digitalisation has in changing an entire industry and distancing the consumer from the comforts of materiality.

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Appendix

A. Survey Questions

1. How old are you?

    a. Under 18

    b. 18-21

    c. 22-30

    d. 31-50

    e. Over 50

2. Do you use music streaming services?

    a. Yes

    b. No

    If answered 'No', the survey would redirect this participant to a question of

    'Why not?' And then the survey would end.

    For those who answered 'Yes', the survey continued.

3. Which service do you use most often?

    a. Spotify

    b. YouTube

    c. Apple Music

    d. Pandora

    e. Other

4. What type of account do you have?

    a. Free

    b. Paid – Premium

5. Why don't you have a paid account? (*open answer*)

6. Do you think the subscriptions are… (*scaled answer*)

   Very cheap (1) – Very expensive (5)

7. Do you have any idea how much your preferred streaming services pays per stream?

   a. Yes

   b. No

8. How much do you THINK the holder of the rights gets paid per stream (in euros)?

   *The holder of the rights than has to share the payment among contributors:

   artists, producer, music company… (*open answer*).

9. Spotify pays (roughly) €3.95 per every 1000 streams to the person with the song rights. Do you think this is… (*scaled answer*)

   Very fair (1) - Very unfair (5)

10. After knowing that Spotify roughly (other platforms are similar) pay only €0.0036 per streamed song. Would you pay more for your subscription?

    a. Yes

    b. No

11. The average monthly subscription is €7.99-€9.99 a month. How much are you not willing to pay a month, after learning how much they pay rights holders?

    a. Less than average (€7.99-€9.99)

    b. The same (€7.99-€9.99)

    c. Between €10-14

    d. Between €15-20

    e. More than €20