ABSTRACT

KEEP IT LOCAL:
MUSIC STREAMING & LOCAL MUSIC COMMUNITIES

by Richard E. Jones

The Napster revolution at the turn of 21st century toppled recorded music revenue streams as peer-to-peer file-sharing and piracy tore listeners away from music retailers and left a power vacuum at the center of the music industry. From 2008-2016, streaming services like Spotify, Apple Music, and YouTube emerged as the de facto leaders in the free culture of recorded music. This paper examines the impact of streaming services on local musicians and explores possible design interventions to improve financial returns of streaming for local acts. Streaming revenues accounted for 51% of recorded music revenue in 2016, but local artists, without the financial resources of major record labels, are not enjoying the financial revival. Favoring regional talent in streaming algorithms and incorporating existing plugins or widgets into the user interface of streaming platforms can funnel more revenue toward local artists.

KEEP IT LOCAL: MUSIC STREAMING & LOCAL MUSIC COMMUNITIES

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Dedication

My thesis is dedicated to my late grandmother, Dorothy Rose Jones, who taught me to pursue my dreams with integrity and gumption.

Acknowledgements

I'd like to thank my thesis committee, Dr. Richard Campbell, Diane Fellows, and Dennis Cheatham for their time, patience and guidance through this process. I'd also like to thank my friends and colleagues in the Department of Media, Journalism, and Film at Miami University, who often served as mentors and collaborators. Finally, this thesis wouldn't be possible without the support of Helen Armstrong, Chris Strobel, Blis DeVault, Dr. Glenn Platt, Jerry Dirr, Mike Montgomery, John Curley, Adam Flaig, Marc Sherlock, and my favorite collaborator, Ali Place. Thank you, all.

Chapter 1: Introduction

1.1 Overview

This paper examines the effect of streaming services on local musicians and explores possible design interventions to improve financial returns for local acts. Using the work of Edward Soja, Michel Foucault, and Henri Lefebvre, I probe the streaming phenomenon through the lens of spatial theory. The primary research question is how can streaming services be redesigned to benefit local artists financially?

1.2 Background

The Free Culture
At the end of the 20th century, the music industry celebrated record sales of recorded music as revenue from 1999 topped $14.6 billion (Goldman, 2010). Compact discs had replaced cassette tapes and drastically reduced the costs of duplication and overhead for major record labels. 1980's technology-filled big box stores like Best Buy or Media Play to the brim with classic and new releases. However, the celebration was short-lived, as the digital technology that made CDs incredibly cost-effective also made music more susceptible to piracy. Peer-to-peer file sharing applications, like Napster, introduced music consumers to a new distribution paradigm. Users could search the music library of other file-sharers for singles and albums. Listeners were no longer relegated to scouring record stores for music, held hostage by the tastes of the store owner, or waiting weeks for their special mail order to finally arrive. Instead, consumers were logging on to the worldwide web from the comfort of their own home to find new, rare and vintage music not available in most record stores. However, the number one selling point was the price: free.

The popularity of digital music, mainly mp3s, proliferated with the introduction of mobile mp3 players, like the iPod, introduced in 2001. Listeners could fit their entire music catalog in their pocket and take it with them to work, school or parties. Apple, Amazon and other retailers, attempted to navigate the music marketplace legally by introducing digital stores where customers could still find the vast libraries available on peer-to-peer networks, but instead, purchase songs individually for $.99. Some consumers opted to procure music legally, but sales would never revisit the zenith years of the l990s.

Streaming On-Demand
Sales continued to free-fall as new players like the music genome project, Pandora, entered the music arena. No longer was the listener held prisoner to the local radio station's format or the DJ's playlist. Each listener created a unique user profile that saved their preferences and included a free membership, also known as freemium (Siegler, 2009). By 2005, YouTube and other video streaming services had entered the music streaming business. YouTube was created as platform for user-generated video but soon became home to music upload by imitators or the artists themselves. Unlike Pandora, YouTube allowed users to listen on-demand. Instead of creating a station based on the listener's taste, users could instead pick whatever they wanted, at any moment. Between music videos and song streams, YouTube accounted for 40% of all music listening in 2015 while paying extremely modest returns to the content owners (Resnikoff,

2015). Revenue from record sales fell to $6.3 billion in 2009 (Goldman, 2010). Consumers voted with their wallets but also preferred the convenience and accessibility of streaming on-demand.

The Rebirth

The music industry has rebounded from the dark days of piracy through streaming royalties and live music revenue. Streaming royalties accounted for 51% of music retail revenue in 2016, up from 34% in 2015, thanks to a massive influx of subscribers to services like Spotify and Apple Music (RIAA, 2017). However, declines in physical and digital sales counter the boosts in revenue from streaming royalties.

The most prominent change in the music industry landscape has been the emergence of the live show as a significant revenue generator. In 2016, 57% of all music spending in the U.S. went to live music events (Nielsen, 2017). From 1996 to 2016 average admission to national acts increased nearly 200% (Coffey, 2017) and revenue from live events hit $7.3 billion in 2016 (Statista, 2017).

1.3 The Problem

National/international acts have enjoyed an economic revival, but local/regional artist revenue has continued to slide. The streaming phenomenon breathing new life into the recorded music business has not trickled down to independent artists. Likewise, the aforementioned live music boom, which accounts for more than half of the industry's revenue, is isolated to festival performers and arena rockers. Live income for local artists is stagnant; admission to local shows has held steady at $5 ($10 in bigger cities like New York, Washington D.C., Los Angeles, etc.) or less.

1.4 Purpose

The effects of streaming and piracy on national/international acts are well documented, but the effects on local and independent musicians are often overlooked. This paper examines the impact of music streaming services on local and regional musicians (artist without mentions in nationwide music entities like Rolling Stone, Pitchfork or spins on corporate radio), and how streaming services can be redesigned to benefit local or relatively unknown artists.

1.5 Methodology

The research conducted for this document consisted of two surveys, one set of interviews, one focus group and field observations. 392 Local musicians from North America and Europe, participated in a survey about performance logistics and finances about hometown performances, touring, digital sales and physical sales. A second survey targeted music consumers and asked respondents about concert attendance, listening preferences, and music spending habits. Social media, recruitment flyers with tear-away tags and personal messages were used to distribute both surveys. An open call on social media identified potential interview participants. Respondents were contacted via email and asked to complete a questionnaire about their experiences in the local music scene. Interview questions ranged from financial aspects (payment per performance, royalties, merchandise sales, etc.) to personal relationships with other musicians. The final method used for this research was a small, four-person focus group asked to evaluate the design intervention developed through the research process. The focus group consisted of two males and two females, two of whom were local musicians and all were music consumers.

1.6 Limitations

Although this study did reach music communities around the world, it is limited in scope. Most respondents are directly connected to the primary researcher and come from the Greater Cincinnati area (Southwest Ohio, Southeast Indiana, Northern Kentucky). For further research, it would be ideal to have a larger, more randomized sample or to conduct similar research in different regions.

Chapter 2: Literature Review

2.1 Introduction

One of the benefits of researching the music industry is the plethora of information available. Besides scholarly work, the multi-billion-dollar sector is a topic of consumer research by big-data companies like Nielsen Holdings. Multiple trade organizations, like the IFPI (The International Federation of the Phonographic Industry) and RIAA (Recording Industry Association of America), produce quarterly and annual reports, summarizing the year's events and trends within the industry. The topic is rich with information, praise, criticism, and projections.

2.2 The Music Landscape

In 1999, at the height of the music industry's popularity and before the Napster era, revenue from sales of music topped $14.6 billion (Goldman, 2010). By 2009, the number had plummeted an average of 8% a year to $6.3 billion, where it seems to have leveled off thanks to digital retailers, the vinyl revival. Artists and labels could no longer rely on healthy and consistent sales of music to prop up financial aspects of their industry.

Streaming's role in keeping the record industry alive has quickly expanded and accounted for 51% of music sales in 2016 (Friedlander, 2017). The subscription platform offered by Spotify, Apple Music, and Tidal contributed to 68.5% growth in streaming revenue from 2015 to 2016, while physical and digital sales both decreased significantly. Overall, music sales revenue (physical, digital, and streaming) grew 23.3% in 2016, which is the first substantial gain in decades.

Despite the massive slide, physical album sales still account for a more significant share of the revenue pie than digital albums (Sisario & Russell, 2016). Along with streaming, vinyl is the only category to show growth. There is still a market for the physical artifact and local artists who don't have the web penetration or hype machine behind them make more money selling these tangible items than collecting royalties from streaming services.

However, there's still a high risk of failure when releasing a new record and there's only a handful of success stories. In 2011, 94% of records released sold less than 1,000 records and only .5% sold over 10,000 records (RIAA, 2015). Which means, there's a massive income inequality problem mirroring the overall U.S. economy. Artists are struggling to make income on music sales alone and rely heavily on the live performance and merchandise.

Artists used to finance their entire careers based on one "hit" and then tour to promote that "hit" or album. But in recent years, even high-earning/selling groups like Radiohead are willing to give their music away for free as a promotional tool for the live show (Holt, 2010). Live music makes up over ⅔ of the entire live entertainment economy (not including sporting events) thanks to increases in ticket prices, festivals and theatre style shows developed in the last two decades. The pay gap between superstar acts and local musicians is widening as ticket prices have doubled since 1996 for big names while local venues still charge $5-10 or possibly even free entry. Some research also suggests fans are more likely to skip going to local shows to budget for attending one big event every three months.

Local venues are a casualty of the U.S. economy. Rising property prices, taxes, and staffing has led to many communities losing venues for smaller acts (Moorey, 2015). While things have been good at the top, the buck gets passed to the consumer and local venues struggle to draw audiences against home entertainment and other nightlife. Fans that used to risk $5 on the band down the street can now research an act from their fingertips and are more discerning about where they'll spend their money. Local and regional artists face an uphill battle in promoting and drawing fans to their shows.

The shift from a media platform to a performance platform creates vertical consolidation between concert promoters, radio stations, and press that excludes smaller acts without the finances or connections to break in.

> This type of substantial vertical consolidation contributes to a system where access to, and success in, the concert market increasingly relies on ties to the dominant firms in the music industry. For instance, artists more often must contract a single promoter to handle all concert locations, diminishing the need for contracts with multiple promoters across regions. Artists outside the promotional umbrella of these firms find it more difficult to organize, promote, and produce concerts successfully (Black et al., 2007).

Independent musicians, without the connections to high-level industry personnel lack leverage to promote their music and performances on the same scale as national acts. The consolidation of these services often leads to higher prices to contract these services which end up being passed on to the fans (i.e., Ticketmaster). The finances of musicians contradict the interests of fans. Likewise, the free music culture of music consumers works against artists.

2.3 Music Consumers

Americans listen to four hours of music on average every day (RIAA, 2015). That's a dramatic increase since the invention of the internet, Napster, the iPod, and streaming. Despite their listening habits, Americans are buying less music than ever and opt to stream music rather than

own. Music takes up a more significant chunk of our daily life now than ever before (Christman, 2016).
In a 2013 release, Nielsen listed six different types of music consumers: aficionado fans, digital fans, big-box fans, ambivalent music consumers, occasional concert consumers and background music consumers (Nielsen, 2013). They're listed in order of music fervor. The first three types of consumers, the fans, are responsible for 75% of music spending even though they only make up 40% of the music consumer population.

Patryk Galuszka (2015) explains an evolution of fandom brought about by the internet and social media and identifies five new roles fans can play; "sponsors, co-creators of value, stakeholders, investors, and filters." These roles are central to understanding the psychology of fans. Stakeholders and investors are actively involved in the funding of a musician's project and put their finances and resources on the line to ensure a project's success. Superfans show an increased interest in being part of the artist's team, whether it's merely promoting their brand on social media or actively financing their artistic endeavors.

Holly Kruse (2010) makes similar observations to Galuszka about fan culture in the internet era but also identifies the importance of physical spaces to the music scene. She refers to this group as the "Unwired Scene" and references 1980's and 90's bands in Champaign-Urbana and their rise to prominence regionally. Kruse also observes the decentralization of the music industry via the internet because distribution is no longer mediated by gatekeepers like record labels and disc jockeys. However, the local music scene still relies on the involvement of its members and community meeting places like venues.

Smartphones, the internet, social media and other tools are creating virtual music scenes separate from that of local, regional, national and international music scenes (A. Bennett & Peterson, 2004). These scenes replace face-to-face interaction with peer-to-peer interaction. Most local scenes are supplemented by the virtual scene as regular community members become friends and carry on their friendship via the internet. Their virtual interactions may build an entirely new virtual scene separate from the original scene. Virtual scenes may also develop out of mutual interest that may or may not include music at all. For example, fans of cyberpunk literature may have a shared interest in electronic music.

The digital era is altering the fan/musician relationship, specifically how fans are reshaping the live music experience with mobile technology. Fans and artists are embracing mobile technology and sharing their moments with their friends. Bennett believes, "Distinctions between being there and participating remotely may become further blurred and continue to be re-negotiated as technology develops," so what does it mean to "be there"? Fans who are live at the event are sharing their experience through social media as it happens. The concept of "liveness" is blurred from being there in person or viewing a live stream on a mobile device or watching a recording performance later.

A variety of factors for documenting and sharing their experiences motivates fans, one of which includes ownership (Lingel & Naaman, 2012). Although the artists write, record, perform and own the intellectual property that is a song, fans feel a sense of ownership over the live performance especially if they record the show on their equipment. It becomes a gift they can share with their fellow fans, bragging rights or even power. Documenting and consuming their experience via social media or video enhances, but does not replace, the live experience.

Being present for the live, in-person performance still carries a significant amount of street credibility (Long, 2014). Fans want to be able to say, "I was there when…" as a means of validating their fandom. If they have actual proof, it's more valuable as the legend of an event can overwhelm the actual circumstances. Fans will brag about attending events they couldn't have possibly attended. A venue with a capacity of 150 people magically expands to include all of the attendees that claim to "have been there…"

2.4 Spatial Theory

When theatre companies began recording their performances to be televised at a later date the intention was not to document the performance but instead to replace the theatre show with the televisual (Auslander, 2011). Space is important to performance, but it’s also negotiable. Many productions tour and change venues throughout their run, musicians change venues every night.

Postmodern political geographer Edward Soja would argue that spaces need to be renegotiated.

> We've produced bad spaces. It's our responsibility to change those spaces. We've produced spaces filled with injustices, inequalities, exploitation, domination, that we've not really seen very much in the past, and now we're beginning to realize that we made them. And if we made them, we can remake them. We need to remake them, we need to organize to change space. - Edward Soja (ELIACE, 2013)

Soja (1996) identifies three types of spaces; First Space is the physical space, the brick and mortar, the latitude and longitude of a space, it is empty of meaning at this point. Second Space is how space is perceived, and the qualities society uses to characterize the space. A grocery store would be a place where people can purchase fruits, vegetables and meats. Third Space is more complicated but combines both First and Second Space. It's how space is experienced. It is individualized for each participant depending on their gender, income, race or personal experiences but also the collective experience. Third Space embodies most of the social rules that affect our interactions with an environment. Soja explains a social triad of space, time and social being.

Henri Lefebvre and Michel Foucault's research contributed greatly to Soja's development of Third Space. Lefevbre's primary interest was dismantling the concept of history as time lived and interjected space as equally important (Lefebvre, 1991). Both lived time and lived space are essential to our history, but also simultaneous. Time and space synchronized produce a third geo-historical element, which is where Soja picks up Third Space.

Most of Foucault's work was related to power structures. He was interested in the treatment of the mentally ill, medicine and prison systems before turning his thoughts to spatial concerns. Foucault (1984) identifies the inherent power issues assigned to spaces through social interaction. Foucault's "Heterotopia" suggests there is an alternate or parallel space beyond the real physical space and the idealistic utopian space, that he calls the heterotopia. Heterotopic spaces are non-hegemonic and exist in both the physical and mental state simultaneously. Foucault considers the space in which a phone call exists a heterotopic space. His most famous example is a mirror, as it a physical object but also reflects a virtual space that is not real.

> The mirror is, after all, a utopia, since it is a placeless place. In the mirror, I see myself there where I am not, in an unreal, virtual space that opens up behind the surface; I am over there, there where I am not, a sort of shadow that gives my own visibility to myself, that enables me to see myself there where I am absent: such is the utopia of the mirror.
>
> But it is also a heterotopia in so far as the mirror does exist in reality, where it exerts a sort of counteraction on the position that I occupy. From the standpoint of the mirror I discover my absence from the place where I am since I see myself over there. Starting from this gaze that is, as it were, directed toward me, from the ground of this virtual space that is on the other side of the glass, I come back toward myself; I begin again to direct my eyes toward myself and to reconstitute myself there where I am.
>
> The mirror functions as a heterotopia in this respect: it makes this place that I occupy at the moment when I look at myself in the glass at once absolutely real, connected with all the space that surrounds it, and absolutely unreal, since in order to be perceived it has to pass through this virtual point which is over there. (Foucault, 1984)

Foucault's interest in the virtual world is an exploration of potential to redesign real spaces with different power dynamics. Foucault passed away in 1984 and did not experience the worldwide web. Had Foucault lived to witness the internet he would most likely argue it too is a heterotopic space and would be intrigued by the power relationships related to the new space. Musicians, record labels and music consumers are still discovering the potential of the platform and there's still space and time to renegotiate a more ideal power structure.

Chapter 3: Methodology

3.1 Introduction

I should lead with a disclaimer: Initially, I was interested in identifying the trends and details around the house concert phenomenon. My focus dramatically shifted when the first set of survey results came back and revealed a massive rift in streaming royalties between local acts and national acts. It was at this point I realized there was a different story I needed to unearth: How have streaming services impacted the finances of local recording artists? Beyond the effects, how can streaming services improve the finances of local artists?

I started by identifying the involved parties: musicians and listeners. The essence of the problem seems to be rooted in the relationship between these two sides. Musicians rely on listeners to listen, buy music and attend shows. But in the free-culture of the streaming era, listeners were no longer fulfilling the basic need of purchasing music. Listeners depend on musicians to record and perform music. Without financing from major record labels, most musicians, especially local musicians, rely on their fans to buy music. The interests of each party contradict the other. I needed to understand better the behaviors and attitudes of each group to contextualize the phenomena surrounding streaming.

3.2 Musician Survey

Intro

My initial research consisted of a 25-question survey (Appendix B) of local/regional musicians about performance logistics and finances. I decided to go with a survey because I needed to cast a wide net to identify trends in local music communities. Most of the questions were quantitative. I thought this data would reveal where to look moving forward.

Respondents were asked for demographic information including location, age, gender and the genre they most commonly performed. Questions about performance pertained to how often acts performed, the average attendance at their shows, and the number of acts slated to play on shows in their hometown, on the road or in a non-traditional venue (i.e., house concert, wedding, art gallery, etc.) for each category. The other questions were about finances: contracts, payout, merchandise sales, and royalties.

Recruitment

I relied heavily on my connections to local musicians and reached many of them through social media posts. I also made a poster (Appendix F) with tear-away tags (like a babysitter advertisement that could be found on the supermarket bulletin board) which was pinned or taped to corkboards and windows at local music venues in the same vicinity as show posters. I also reached out to local Cincinnati music publications, CincyMusic.com (a music blog/review focused on the Cincinnati music scene) and CityBeat (a weekly alternative paper that covers music, arts, politics, food and more), to help reach local artists to whom I wasn't connected. Because of the narrow audience needed for this survey I also contacted some musicians personally via text message, email, or Facebook Messenger. At one point, the male to female response was 12:1, so I reached out to female friends and asked them to share the survey link on their social media pages.

Despite the aforementioned interventions to find more female responses, male participants made up 69.1% of responses to only 29.5% of female respondents. The male-to-female ratio in music is drastically lopsided. A survey conducted by The Guardian in 2017 looked at 370 live music events in the UK and found 69% of musical acts are male-only, while 22% are mixed-gender, and only 9% are female-only (Larsson, 2017). Of the mixed-gender acts, most acts featured only one female musician, while female-only acts were often solo musicians. The gender ratio is likely more lopsided than represented by my survey.

Participants

392 musicians did respond, of which, 49% were rock/blues/indie/alternative musicians. This statistic may be indicative or "rock" being a catch-all response for many music genres. Many musicians play a variety of styles, from jazz to punk. To simplify their answers, they may just pick "rock." It's also likely that my position in the music community, personal relationships, and circle of friends tend to be with rock musicians.

Greater Cincinnati, Ohio was the most common location (37.7%), although I did gather responses from as far away as Switzerland, Turkey, Germany, and Italy. Most respondents claimed residency in Ohio (44.1%), Kentucky (15.3%), West Virginia (4.3%), Ontario, Canada (4.1%), Massachusetts (3.8%), Pennsylvania (2.0%), and Indiana (1.5%). Social media played a big role in distributing the survey. The popularity of a participant who forwarded or shared the survey may also result in a bump in responses through their social networks. My location and connections can explain most of the areas with the greatest response, but it is interesting to see how far the survey traveled.

3.3 Music Consumer Survey

Introduction
My second survey targeted music consumers 18+ years old. This survey (Appendix 49) was also 25 questions but focused on concert attendance, listening preferences and music spending habits. This survey was developed to gather quantitative data on music listenership, especially as it relates to local musicians and streaming.

Recruitment
The survey was posted on my social media accounts and quickly reached over 400+ respondents in the first week. After two weeks, the survey was paused for data collection.

Participants
474 participants responded to the survey. Once again, rock/blues/indie/alternative was the most popular category, as 51% of respondents pinned it as their preferred genre. 49.4% of respondents were male to 48.8% female. The most common age range of participants was 26-35.

3.4 Musician Interviews

Intro
After collecting quantitative data from musicians about their finances, I again reached out to musicians, this time for qualitative data to contextualize some of the trends I was noticing. The questions pertained to the artists' relationship with the local music community, access to resources/press/mentors, their experiences with local and non-local venues, and of course their feelings about streaming services (Appendix C).

Recruitment
I posted an open call for participants on my social media accounts, and over 70 individuals contacted me about participating. I sent out 50 emails with the interview questions and directions and received 17 completed responses.

Participants
The 17 respondents range from young musicians, just starting out to veteran local musicians who play for a living. The variety of responses between participants reflects different attitudes towards music but also the personal experiences of the respondent.

3.5 Limitations and Further Research

Unfortunately, without grants or other funding, my data is restricted to a convenient/snowball sample, because it only reached those directly connected to me or within a few degrees of separation because it was shared among respondents through social media. I did look into contracting the services of Qualtrics for a randomized sample of local musicians but because of the niche audience I was attempting to reach it would be roughly $8 per respondent.

Moving forward, I would break out the "rock/blues/indie/alternative" category into more specific sub-genres and have participants pick three genres instead of one. Rock will probably be the most popular, but it may at least shine a light on other popular formats.

Also, I opted for ranges on many of the spending questions which lead to pools of responses. If I had left the answers open to fill-in, it may have resulted in more useful data where I could at least pull means and medians. In many cases, the ranges ended up being too high. It was disappointing to learn how little local musicians make.

Chapter 4: Results & Findings

4.1 Introduction

It's worth noting that my first survey was an attempt to understand the finances of local artists better. I changed my focus and research question after the first survey when I realized streaming revenues had to be addressed. The following sections will better detail the dire circumstances of local artists' finances. Luckily for them, most local artists don't play music for a living.

4.2 Musician Survey

Streaming

The results from the musician survey paint a very dreary picture. A majority of respondents picked the lowest value on every question about revenue for local artists. The most lopsided being that 79.0% of respondents reported making less than $20 per month on streaming (figure 4.2.1).

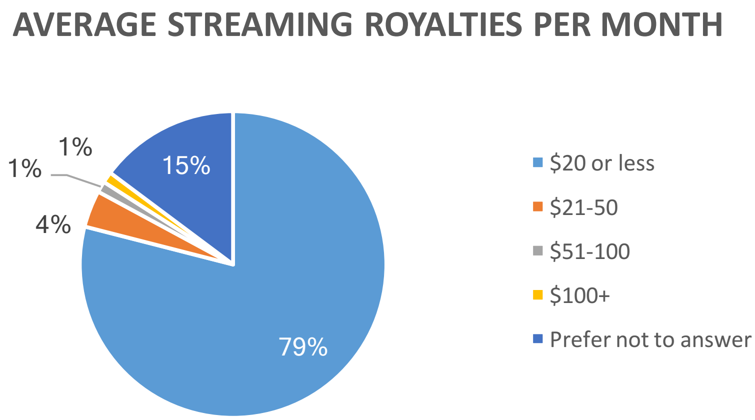

Figure 4.2.1 – Streaming Royalties per Month

Live Music Events
The payout from shows ended up being the least depressing statistics. A majority of respondents reported making an average of $100 or more for local (51.7%) and non-local shows (61.7%). Non-traditional shows did not pay as well on average as traditional shows (figure 4.2.2).

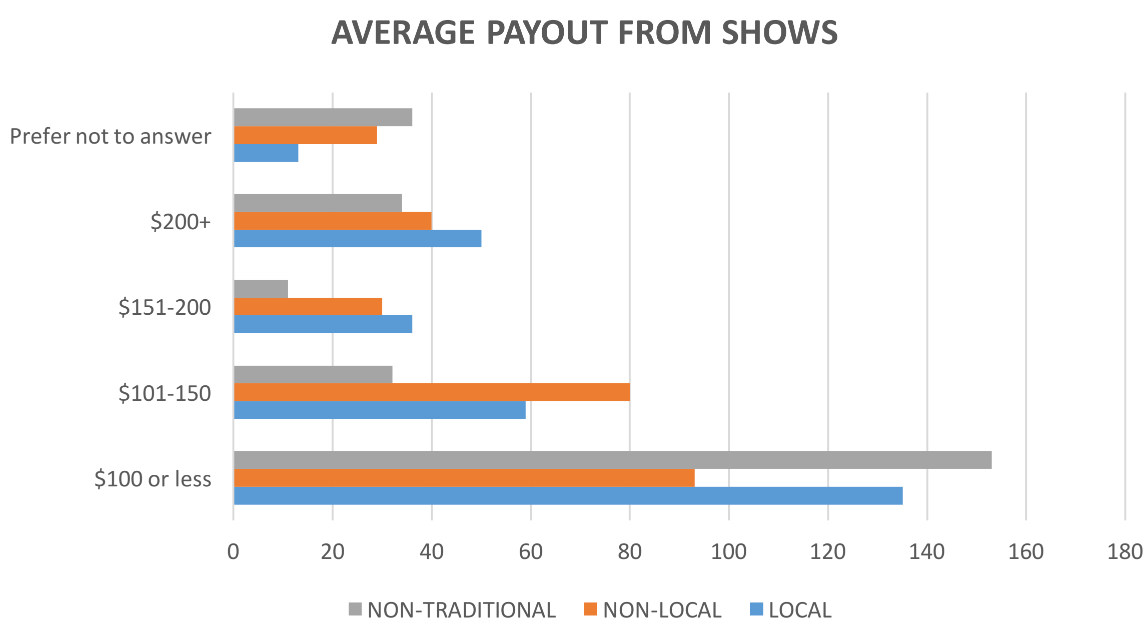

Figure 4.2.2 – Average Payout from Shows

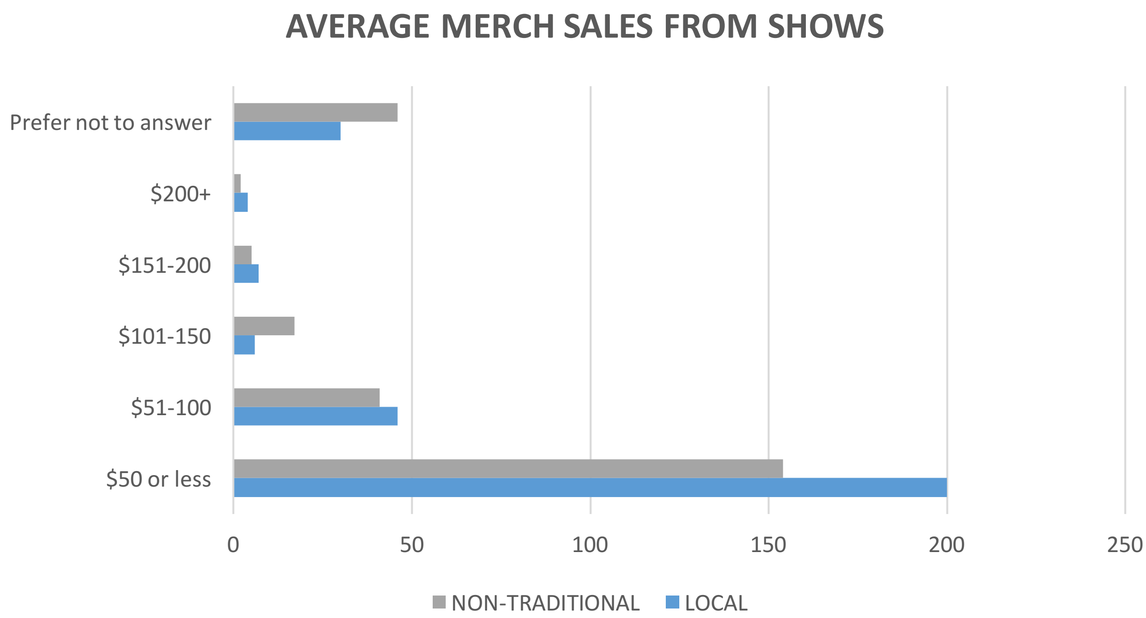

Figure 4.2.3 – Average Merch Sales from Shows

Digital Sales

The revenue generated by digital sales is almost as bad as revenue from streaming. 68% of local artists report making less than $20 a month. At least, there's hope that streaming revenue will generate more income down the line if more free users convert to premium subscriptions.

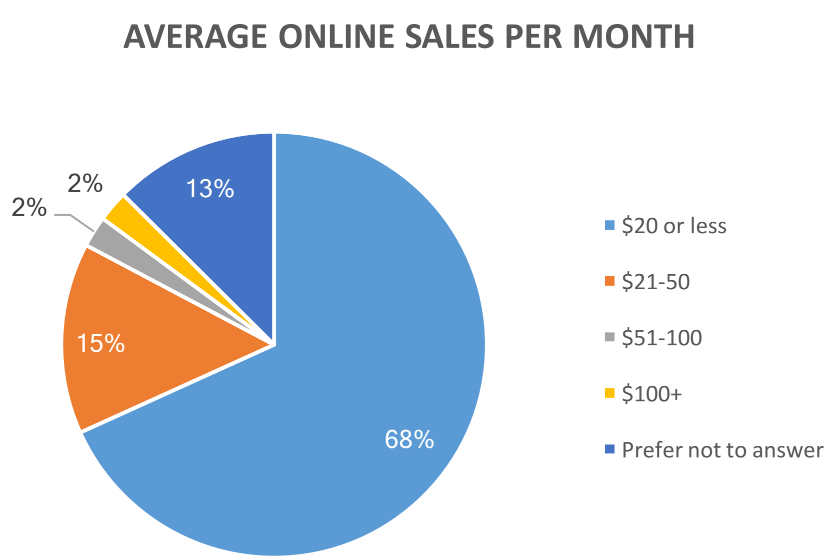

Figure 4.2.4 – Average Online Sales per Month

4.3 Music Consumer Survey

Streaming

Based on the survey responses, it's evident streaming is not the future of the music industry; it is the present. 62.2% of survey respondents ranked streaming services as their first or second most common method for consuming music (figure 4.3.1). For further analysis, I divided participants into three groups based on how they consume music: heavy, medium and light streamers. Heavy streamers are those who ranked streaming as the first or second most common method for consuming music, medium streamers ranked streaming third or fourth, and light streamers ranked fifth or lower. I use these groups to identify relationships between streaming and other music-related activities.

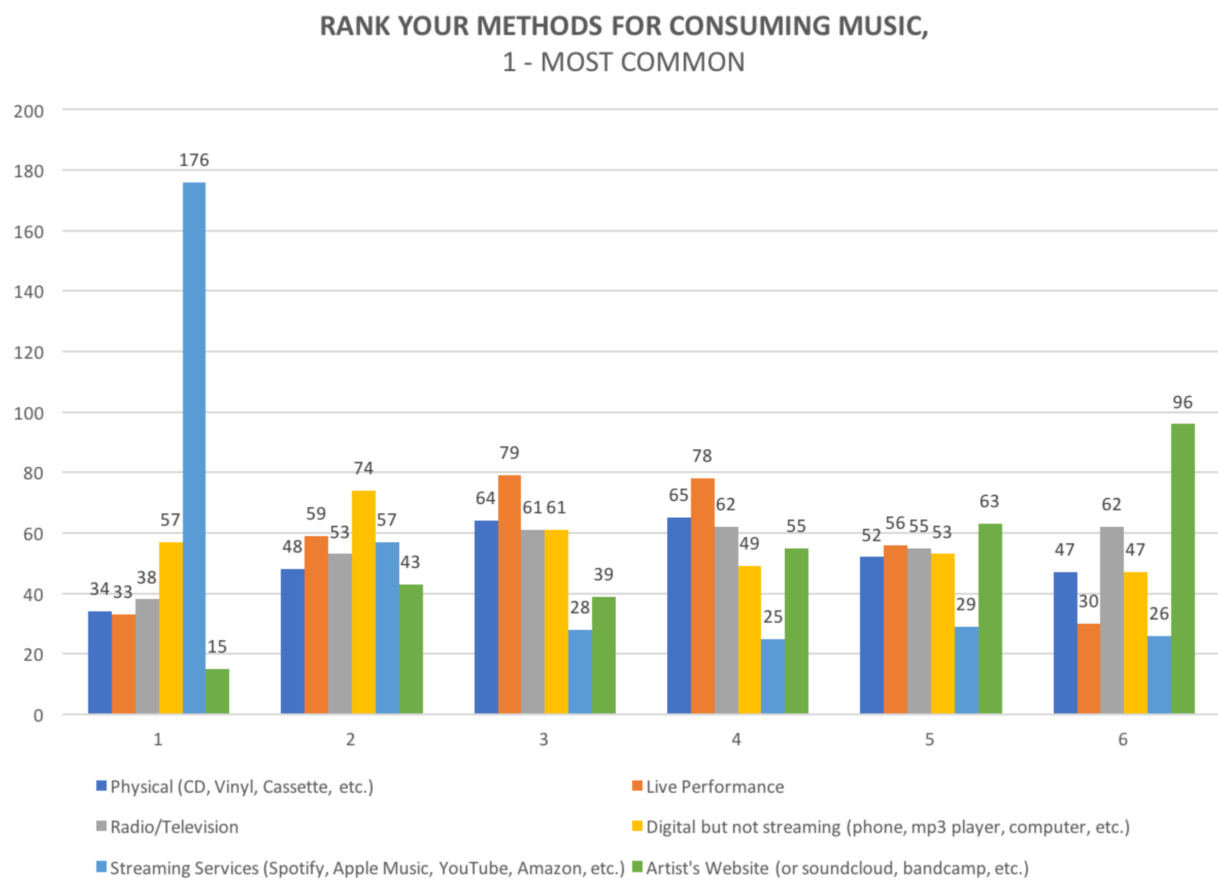

Figure 4.3.1 – Ranking Methods of Music Consumption

Heavy Streamers

There are a few significant correlations between streaming music-related activities. For example, heavy streamers spent significantly less money on digital downloads of local/regional bands than medium and light streamers [$F(2, 379) = 3.73$, $P < .05$)]. If heavy streamers have access to 30 million songs on-demand, it would seem unlikely they would purchase digital downloads. Another unsurprising correlation is that heavy streamers were more likely to spend more money per year on streaming than medium and light streamers [$F(2, 379) = 14.42$, $P < .05$)]. Neither of these correlations revealed new information but may indicate the accuracy of the survey.

What did catch my attention was that heavy streamers attended fewer local/regional shows per year than medium or light streamers [F(2, 370) = 6.018, P < .01)]. The same is true for national performances [F(2, 370) = 6.018, P < .01)]. These correlations lead me to question what kind of Nielsen music consumers are heavy streamers (Nielsen, 2013)? Is there a way to engage heavy streamers so they'll attend more shows and spend more money?

Physical & Digital
Music consumers are spending less money on physical and digital music for local acts, the same as they are for national acts (figure 4.3.2). A majority of respondents paid less than $50 for physical music, and less than $20 on digital music, from both national and local artists.

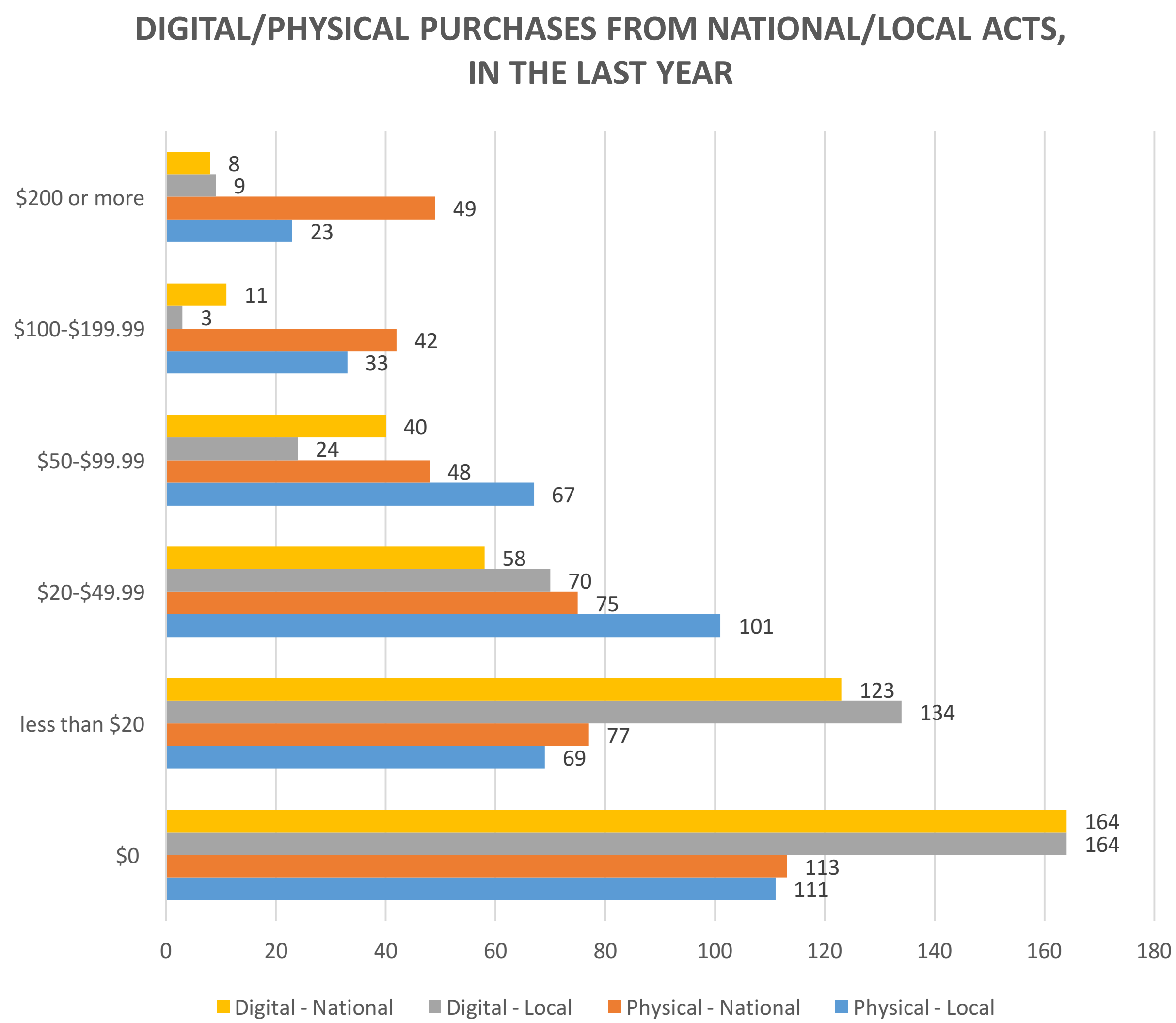

Figure 4.3.2 – Ranking Methods of Music Consumption

Cost of Admission
There may be an opportunity for local artists to generate more revenue off of live performances by raising prices. 64.9% Local artists identified the average cost of admission for their shows was less than $5, while 86.5% of attendees expected to pay $5 or more, with 44.5% expecting

$5-10. The numbers stretch even further when attendees are asked what they're willing to pay. 59.7% of local concert attendees are willing to pay $10 or more admission (figure 4.3.3).

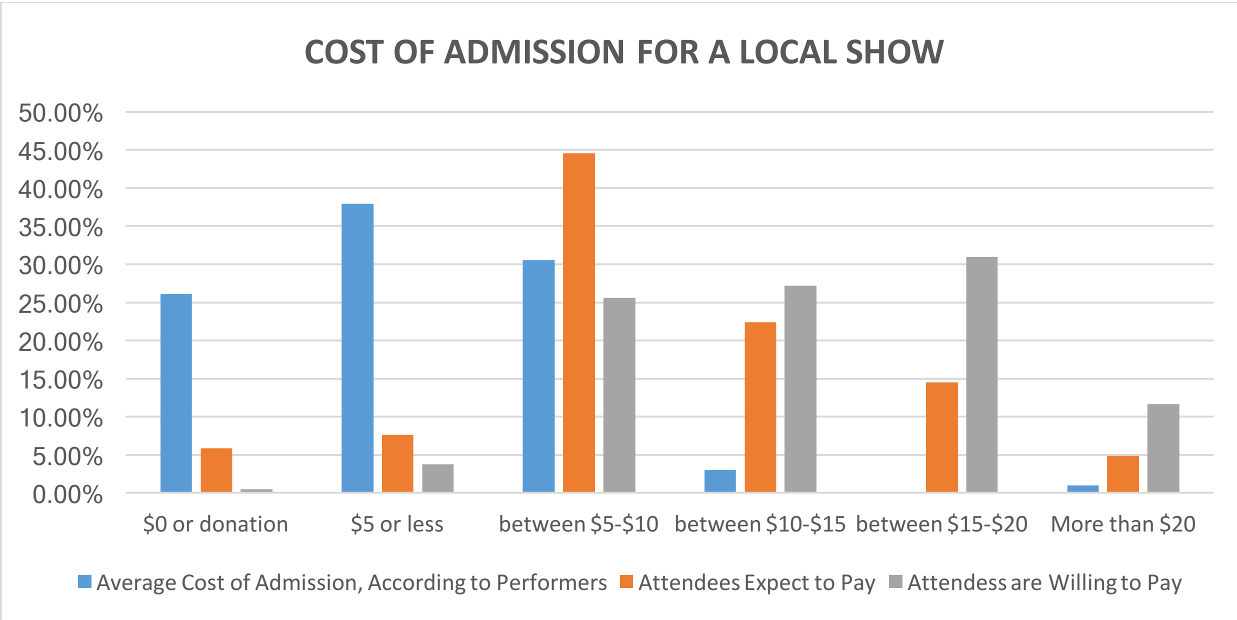

Figure 4.3.3 – Cost of Admission

4.4 Musician Interviews

Optimism and Creativity

Despite the statistics mentioned above, local artists are incredibly optimistic about the future of the music industry. Younger musicians (18- 25 years old) never experienced the glory days of the 1990s, and veteran musicians have brushed aside expectations of rock n' roll fantasies and just want to share their music with anyone that will listen. Local musicians are less concerned with making money off streaming and more concerned with their creative expression.

> *"I have as much creative freedom as my band will allow… I want to sing my own way, and write my own songs. As long as me and my band feel great about the products, we will perform honestly for the crowd, who will in turn either like it or not. We can't do anything but be honest performers." – Interview #3*

> *"If you don't have to rely on music for income, you can do anything you want." – Interview #13*

A majority of local artists believe the streaming platform has had a positive impact on their music and life because it's made their art more accessible.

> *"The direct and deliberate means in which a band can share/distribute streaming audio with a listener has, I think, greatly and positively impacted my music." – Interview #16*

Streaming as a Tool

When asked about the effects of streaming, the optimism carried over. Local artists are disappointed that streaming services don't pay as well as traditional sales, but they're resigned to the new reality. Most artists have no choice but to embrace streaming, so they embrace it as a tool to connect with listeners. When asked to compare streaming services to the past, Interviewee #13 was shocked I made the comparison.

> *"(It's) WAY better now. Are you kidding me. In the past, it was impossible to get anyone to hear your music." – Interview #13*

Other participants lamented the pay structure and size of the catalog, but recognized the opportunity to reach millions of new listeners.

> *"People like that they can find us there, but of course, the payout is bullshit." – Interview #5*

> *"Spotify is nice because of the audience it has the potential to reach… but Spotify has such a gigantic catalog that some artists can get lost in the mix." – Interview #10*

Interviewee #16 surmised that the burden of exposure was still the responsibility of the artist. Streaming services, like Spotify, don't actively promote local artists, but they do provide the tools artists may need to reach listeners where they listen.

> *"The POTENTIAL for more exposure, instant availability of content to a listener, etc. is obviously there BECAUSE of Spotify, but it's really all still up to the band(s) to put themselves out there and let people know where they can find their music." – Interview #16*

Listeners used to come to the artists. They would track artists down and research them on their own (some still do), now the artist comes to the listener.

Radio

Despite the massive spikes in streaming usage, over-the-air broadcasting was still 47% of listeners preferred way to discover new music (Nielsen, 2017). Local artists identify local radio as a powerful ally in exposing new listeners to their music. Independent and college radio stations are more likely than corporate radio stations like those owned Clear Channel, Infinity or Cumulus, to feature local artists. However, many regions have lost their independent or college radio stations, including Cincinnati's WNKU.

> *"I think WNKU has done more for us as a band. I recall having multiple people approach us at a show saying they heard about us through WNKU and I cannot recall one person claiming Spotify as their introduction." – Interview #10*

There's potential for exposure through streaming services, but if their music makes it on the radio, the exposure is instantaneous. Unfortunately, many communities have lost their local independent radio stations. The only channels left that play local music are low-power stations with limited reach and corporate stations that spin local tunes in late-night, lower listenership spots. Radio is a powerful exposure tool, but local artists have restricted access.

4.5 Conclusion

The finances of local artists are in bad shape. Streaming and digital sales account for less than $20 in revenue every month for local artists, and that's where listeners prefer to listen. Despite that, local artists are still optimistic about the future of streaming and their access to potential listeners. Local artists think of streaming as a tool for exposure rather than a revenue source.

Live performances, at home or on-the-road, are the most lucrative source of revenue for local artists. Most artists make more than $100 per show, but there's an opportunity for more if they start charging more for admission. Local show attendees are willing and expect to pay more to attend local shows than what they currently pay.

Finally, listeners classified as heavy streamers are less likely to attend local or national shows. This may be an indication of their fanship. Digital fans, as defined by Nielsen, "enjoy free access to internet radio and spend less than aficionado fans" (Nielsen, 2017). Heavy streamers appear to be highly engaged with music through streaming but are less engaged with the live music experience.

Chapter 5: Discussion

5.1 Live Music Revenue

In the wake of peer-to-peer sharing and piracy, recording artists have relied more and more on their live performance for financial security. In 1999, live music events accounted for $1.5 billion of revenue for the $16 billion music industry (Statitsta, 2017). By 2016, live music was a $7.3 billion industry of its own. National acts are charging more as ticket prices have swelled from $25.81 in 1996 to $76.55 in 2016 (Coffey, 2017). These numbers do not include resale prices where scalpers inflate the price of tickets for events depending on demand. Some of this can be attributed to festivals and multi-day events which have several headliners on one ticket. Regardless, big name artists are making more money per show while local artists are making the same or less than 20 years ago.

As discussed in section 4.3, admission to local live music events is due for an increase. Music consumers are both willing and expecting to pay more than what local artists are charging for the cost of admission. Raising ticket prices may result in some music consumers attending fewer shows. However, there's a large segment of the music consumer population that is highly engaged but not attending as many concerts. If local artists can attract heavy streamers to live music events, they could not only raise ticket prices but also have higher attendance.

5.2 Radio

In October of 2017, the Federal Communication Commission eliminated a 1939 rule that mandated radio & TV stations have a studio in the town from where they broadcast (Shields, 2017). The law was adopted with the intention of giving the community some input in the coverage of local events. This ruling coupled with the consolidation of news, radio and TV outlets to a handful of conglomerates threatens to narrow local coverage as media providers will no longer be required to have production facilities in the communities their broadcasts reach. Many college and independent radio stations have already gone off-air as listeners have shifted to new outlets like podcasts or streaming services to fill their entertainment and news needs.

Northern Kentucky University sold its college radio station, WNKU, in February of 2017, after the Governor of Kentucky, Matt Bevin, slashed university funding. WNKU featured alternative, independent and local Cincinnati musicians, and was syndicated to nearby regions including Huntington, WV. Local musicians were regularly featured and in rotation on WNKU; most corporate stations are unlikely to play local music and if they do it's in a low-listenership "local hour." Meanwhile, independent stations, like WOXY from Oxford, OH, that showcased local, regional or undiscovered talent, have moved, relocated or sold their broadcasting license, leaving their communities without alternative choices. Even public radio stations have consolidated. Cincinnati Public Radio owns two stations, 91.7 WVXU and 90.9 WGUC while operating a third station, Miami University's 88.5 WMUB. This is a regular occurrence in communities across North America. Local listeners have less variety in over-the-air broadcasters, and local musicians have less access to outlets willing to spin their tunes.

Recording artists that are lucky enough to have their music played on radio stations enjoy many benefits including exposure and validation. Exposure because radio stations have built-in audiences that would be difficult to reach without the station. There are few opportunities where local musicians can reach thousands of listeners at once. Validation because playing a local/regional act between two national/international acts equates them as equal. The national act may sell-out an arena on their next visit to town, but in the radio station's programming, the three minutes of airtime each act gets is of equal value.

Streaming services do not actively serve local communities. Some playlists may feature local artists or podcasts that talk about community events, but overall, streaming is appealing to a national or international audience. There's an opportunity for streaming services to fill the void locally based community radio stations left.

5.3 Streaming

Streaming is the present and the foreseeable future. It may not be the most financially beneficial platform for recording artists, but the listeners have spoken. The other inconvenient truth musicians must face is that most listeners still use freemium services. YouTube has over 1 billion users, 99.9% of them use the service for free (Sanchez, 2017). 57% of Spotify's 150 million users are freemium users. Of Pandora's 81 million users, 95% use it for free. The result of the freemium trend is smaller royalty payments to copyright owners but also negative returns for the streaming companies. Spotify recorded a $600 million loss in 2016 (Smith, 2017). The only way for these companies to remain profitable is to pay fewer royalties, run more ads, or register more paying subscribers.

Apple Music's entry into the streaming world is notable because Apple doesn't offer a freemium level. Apple will give new users a three-month trial period for free, but after the trial period, users are enrolled at $9.99 per month. It's similar to the platform Napster adopted after their 2001 legal defeat (Lamont, 2013). Spotify, Pandora and Tidal all offer a similar, advertisement free, premium subscription. Even YouTube entered the paid-subscriber environment with their 2015 launch of YouTube Red, which promises "uninterrupted music, ad-free videos, and more," for $9.99 per month (YouTube, 2017).

If the push for paid subscribers is successful, it will mark another paradigm shift in the value of recorded music as listeners swing from buying to stealing to subscribing in less than two decades. It's not imperative that all users convert to paid subscriptions. Under the Spotify model, 70% of revenue is paid out to copyright owners; the rest stays with the company to pay for the service (Sanchez, 2017). If Spotify could relive 2016 with 16.7 million more premium users instead of freemium users (76.7 million premium users, 73.3 million freemium users, 150 million total users) they would have ended the year even instead of $600 million in debt ($600 million / 30%($9.99/mo/user x 12 months) = 16.7 million users).

An additional benefit to converting more freemium Spotify users to premium users would be an increase in royalty payments. 16.7 million premium subscribers would net another $2 billion in revenue, $1.4 billion of which would be passed on to copyright owners. Which means the $.00437 Spotify paid per stream in 2016 would go up as well (Dredge, 2017).

One advantage local and independent artists have on their major label colleagues is ownership. Major label artists (most national acts) sign away a percentage of ownership rights on the material they create. Many household names, including Prince, have waged long and expensive legal battles against the record labels that own their content (Newman, 2016). In Prince's case, he ended up changing his name to a symbol to break the contract and sign a new one with more favorable terms.

Independent musicians, by definition, are not under contract. Independent artists (most local acts) own their material, meaning any royalties their material accrues is paid out to the artists, not a record label. It's often advantageous for artists to work with record labels because label representatives may be well connected and offer opportunities not available to independent artists, but the price of that access is often signing away ownership.

If local artists can hold on to the rights of their material, they're in a far more lucrative position than major label national acts because they won't have to share their royalties with labels of financiers. When paid subscriptions to streaming services become ubiquitous, the revenue generated by streaming services will increase dramatically. On a platform like Spotify, where artists are paid a percentage of the company's total revenue, the bigger the pool of money, the more artists are paid in royalties. In 2016, Napster, a company with no freemium accounts, paid $.0167 per stream. That's nearly four times what Spotify pays per stream.

Chapter 6: Intervention

6.1 Introduction

My research to this point has made a few things evident: 1. Streaming is a requirement. Local artists cannot be successful if they're not available on multiple streaming services. 2. Streaming is unfair. Major label national acts that have the financial support, publicists, tour bookers and distribution around the globe have all the power. I suggest streaming services level the playing field by actively favoring local artists through an algorithm tweak or adding localization features.

Pushing listeners toward local acts instead of national acts will generate a significant amount of streaming revenue for local or regional artists. Beyond an altruistic gesture, the added features may lead to more listeners who prefer local artists over national or tastemakers who want to be the "first" to discover something. This type of music consumer is regarded as an aficionado fan by Nielsen and accounts for nearly 34% of all music revenue as a group (Nielsen, 2013). It's not just more users; it's more users that spend money.

6.2 Background

Bad Space

The virtual space that streaming inhabits is a bad space. It's not all bad. It's actually been great for music listeners. That's part of the problem though. Peer-to-peer file-sharing, piracy and streaming have redistributed the power, once held by major record labels, among the music consumers. Unfortunately, musicians were left out of the power equation. This is not to say they're powerless. For one, most musicians are happy to have distribution to a much broader audience. Before the internet, musicians would beg record store owners to put their records on the shelf. They're best chance to impress new fans was at a show. Now, with the click of a button, any act can post a song on Spotify or YouTube that can be accessed by anyone from anywhere in the world. Of course, ANYONE has access to post content, which means more content with which to compete. Although the platform has changed, there are still inherent discrepancies in the power structure. The typical cost to break a national/international act in a new market is $0.5 – $2 million (IFPI, 2016). That's a massive investment even for powerful record labels, but for local, independent artists, that's impossible. Without publicity and marketing, local artists find it hard to cut through the noise. Those with money can afford to play the game, those without can wish.

Often overlooked, local musicians have grown accustomed to being the underdog. In the world of streaming services, the trend continues. Beyond the conceptual design of streaming which allows users to access a 30 million song library from the palm of their hand, the design is flawed. Streaming services do not empower local recording artists. I do not have access to the algorithms these services use to serve up content to their users, but it is a passive experience. Local artists upload their music and fade into the noise, too small to be heard.

Power Structures
Major labels, with superstar talent and clout, negotiate their contracts with streaming services. Spotify spent the first half of 2017 making deals with Universal Music Group and Sony Music to secure their content for the platform. This is a luxury independent artists do not have.

National/International acts, like Taylor Swift, can boycott streaming services if they don't like the terms of the contract. Taylor Swift's saturation and reach is so powerful that even if her music isn't available to stream for free online, it's still widely accessible, even unavoidable. National acts are boycotting streaming because the royalties are too low, but local artists don't have a choice.

Local artists can abstain from putting their music on the service, but by doing so, they remove themselves from a potential discovery platform. For local artists, streaming is a tool for exposure. Local artists have resigned themselves to the fact they won't make a living wage off of streaming. Instead, local artists use streaming to meet the listeners where they listen.

6.3 Rationale

Opportunity

> We've produced bad spaces. It's our responsibility to change those spaces. We've produced spaces filled with injustices, inequalities, exploitation, domination, that we've not really seen very much in the past, and now we're beginning to realize that we made them. And if we made them, we can remake them. We need to remake them, we need to organize to change space. - Edward Soja (ELIACE, 2013)

This quote from Edward Soja became the rallying cry for my design intervention. I realized I didn’t need to invent a new design that would change the music landscape again. In fact, a new platform, without investors, in an already overcrowded marketplace would be destined for failure. Instead, I opted to remake the space.

Favoring Local Artists
When I identified my mission to remake streaming services, I started with a simple question: How would a streaming service that favors local artists work? I examined the second most popular platform, Spotify, to find opportunities for improvement. I chose Spotify because it's designed to stream music, unlike YouTube, which is intended to stream user-generated videos but music crept in.

When I visited the artist page of national/international acts on Spotify, there were recommendations for "Related Artists." Every recommendation on the page was another national/international artist. For example, when you visit The Beatles artist page the "Related Artist" are John Lennon, George Harrison, Paul McCartney and The Beach Boys. For Taylor Swift, the recommendations include Katy Perry, Demi Lovato, Kelly Clarkson, Miley Cyrus and more major label artists. For the Foo Fighters, it's Nirvana, Pearl Jam, Soundgarden, Queens of the Stone Age and more arena rockers that all have hundreds of millions of streams. This holds true among the tiers. The larger the artist, regarding streams, the larger the recommended artists tend to be. Except at the local level. Local artists tend to refer listeners up the food chain. The favor is not reciprocated back to the smaller artist. There's no cross-pollination from national acts to local acts. Unlike radio, where local acts are sandwiched between national acts,

If the Spotify algorithm were altered to refer national artist listeners to similar local acts, instead of all national acts, it might result in more listeners for local artists. By featuring local artists on the pages of national artists, it validates the local artist, similar to the way radio validates local artists. In other words, streaming services can let major label superstars be the attraction but then suggest artists local to the listener as continued listening.

Search by City
You can't search by location on most streaming services. If you search "Cincinnati" on Spotify or Pandora, the results include artists, songs, albums and playlists with the word Cincinnati in their name/title, like the Cincinnati Symphony Orchestra or "Oh, Cincinnati" by The Seedy Seeds. Any Cincinnati artist returned in the search is because they named an album or song after the city. The same query on YouTube returns videos with Cincinnati in the title, but most are unrelated to Cincinnati music. Streaming services should let users search by city.

Live Music Events
Spotify tracks your location. This is apparent because under the concerts tab in the browse function there's a list of live music events in your area or nearby. All of the suggested concerts in this feature are national acts performing in venues with capacity for at least 1000 occupants. Individual artists' pages also have a concert tab that shows their entire tour schedule. The widget Spotify uses to pull this data is called Songkick. Songkick is a concert database that sorted by location, artist or venue. Website and app builders use the Songkick widget in a variety of formats. Local artists can edit their performance listings for free through a service Songkick provides called Tourbox. Streaming services should employ the Songkick widget more broadly. In Spotify's case, why not showcase all local shows, not just the big ones? And why not add the widget to the front page of the user interface instead of burying it in a tab? For local artists, live performances generate the most revenue, so any attempt to bring listeners out to a concert is welcome.

6.4 Redesign

Overview
I developed three approaches to redesigning the music streaming experience. The first would be rebuilding the entire experience putting local music first. It could be an entirely new app or just a takeover of an existing app. The second would be subtler, as the streaming algorithms used by Spotify, Pandora, and YouTube could be tweaked to promote local music more often. This approach is less intrusive to the user experience and could be adopted by streaming services without overhauling their entire brand. The third option would be to add a new feature where users could stream by location. It would be an extension of the current service streaming apps provide but wouldn't affect the rest of the app. Users could narrow the streaming experience to a point on the map instead of the whole globe.

I do recommend streaming services adopt the "Search by City" and expand the Songkick widget function discussed in section 6.3. These features add flexibility and versatility to the user experience without disrupting what is already in practice.

These solutions are deliberately simple. The industry has undergone major changes in the last two decades and is still tweaking the new model. The interventions I'm suggesting are designed to level the playing field for local artists without endangering the prospects of national acts.

Local Music-Centered Design
Building a local music streaming app from the ground up would be a ton of work and very unlikely to succeed. I entertain the idea from a critical design perspective. It would be a grassroots effort where the local artists would have to buy-in to the concept and actively promote the app to their fanbases. If the app did find an audience, some communities would lack the volume of local releases to sustain listener interests and advertiser appeal (music deserts). Listeners could branch out to new cities or expand their net, but the shared experience or water cooler talking points of national acts would be missing. A local music streaming app is idealistic but not realistic.

Trojan Horse
Local artists don't rely on streaming as the primary revenue source but as a tool for exposure. To increase the exposure potential, I redesigned streaming services to promote local artists to listeners of national artists. A user's homepage would put local artists in the same position as national artists (figure 6.4.1). The "Related Artists" feature would pin local talent next to superstars (figure 6.4.2). Charts would include national charts but also local charts that track what's performing well in the user's region but also which local artists are trending (figure 6.4.3), and the calendar would list arena shows, and pub shows side-by-side (figure 6.4.4). It would not be a complete overhaul of the platform, just a tweak in the algorithm to offer local acts in the place of national acts.

Listeners would sign up by email and then fill out a short listening preferences survey or they could signup via Facebook, and their preferences would be pulled from their Facebook account. Over time, their listening habits would inform their user profile so the algorithm could offer more accurate suggestions.

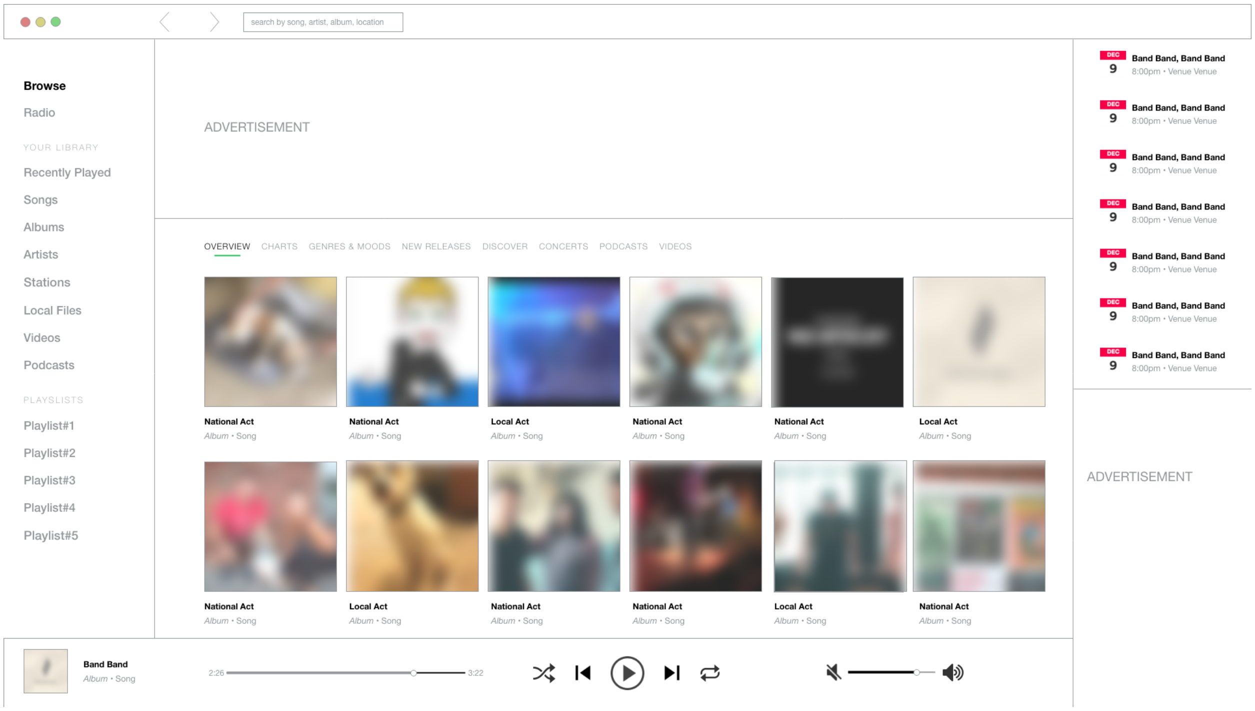

figure 6.4.1 – Trojan Horse Homepage

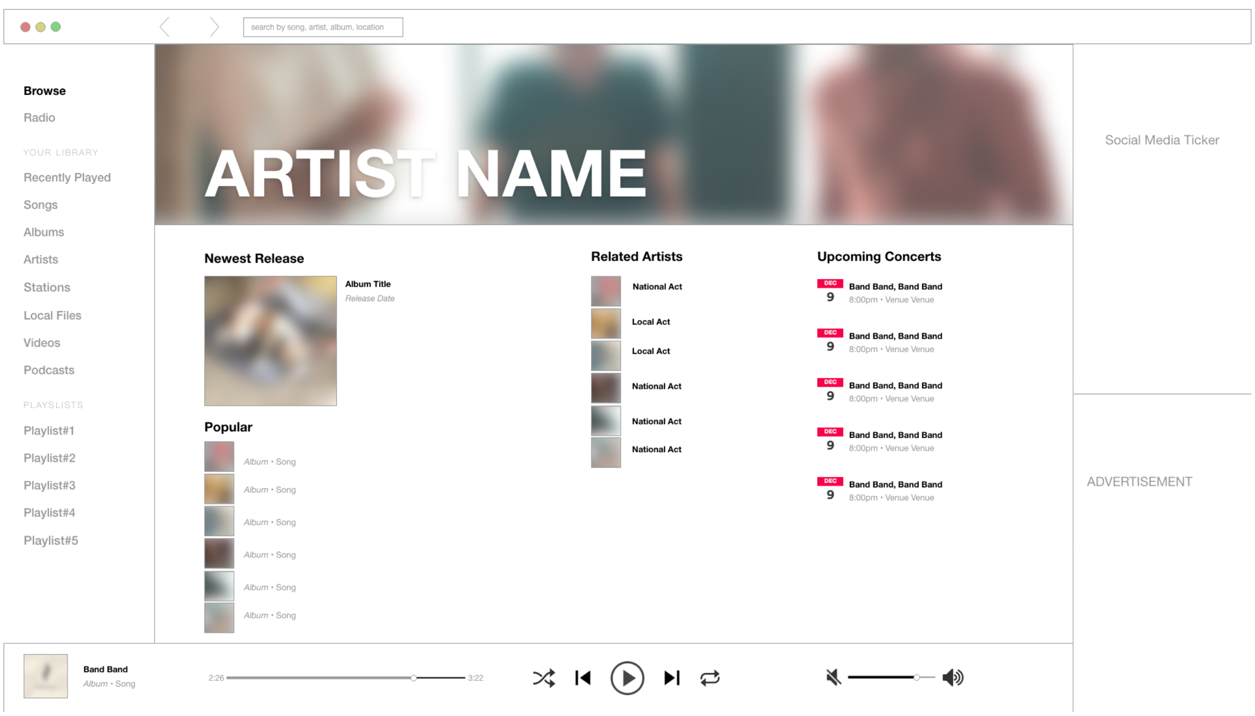

figure 6.4.2 – Trojan Horse Artist Page

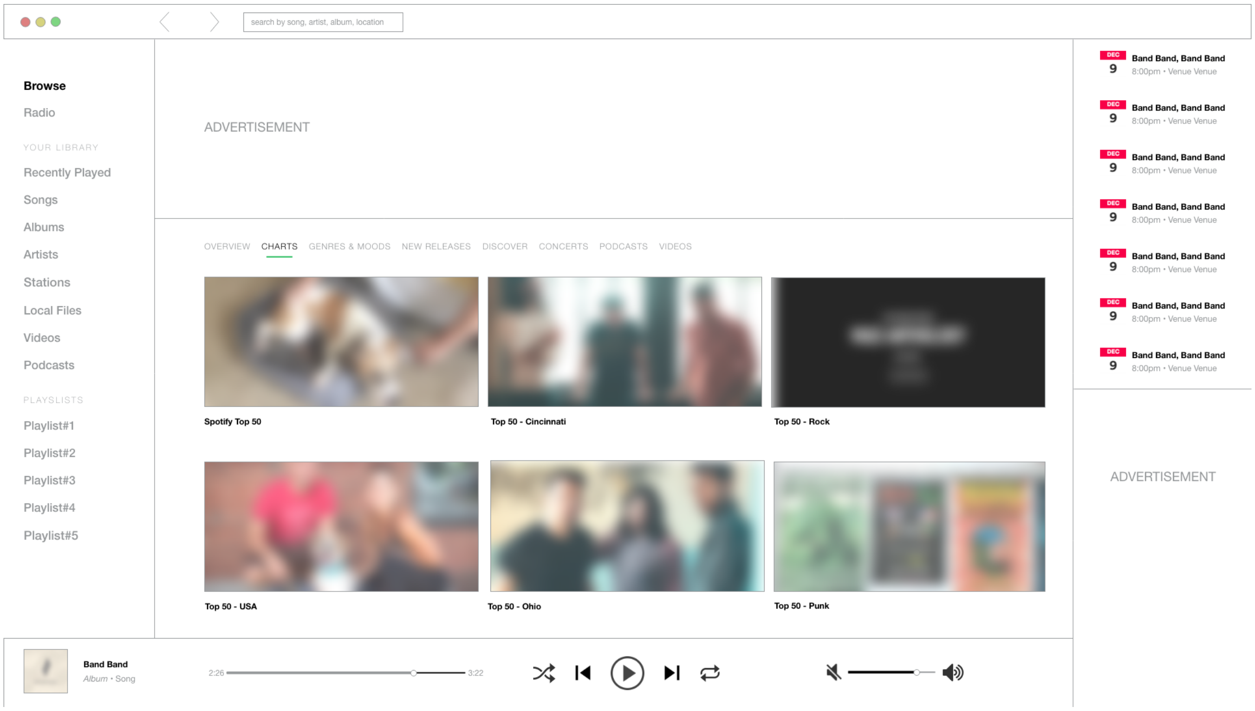

figure 6.4.3 – Trojan Horse Charts Page

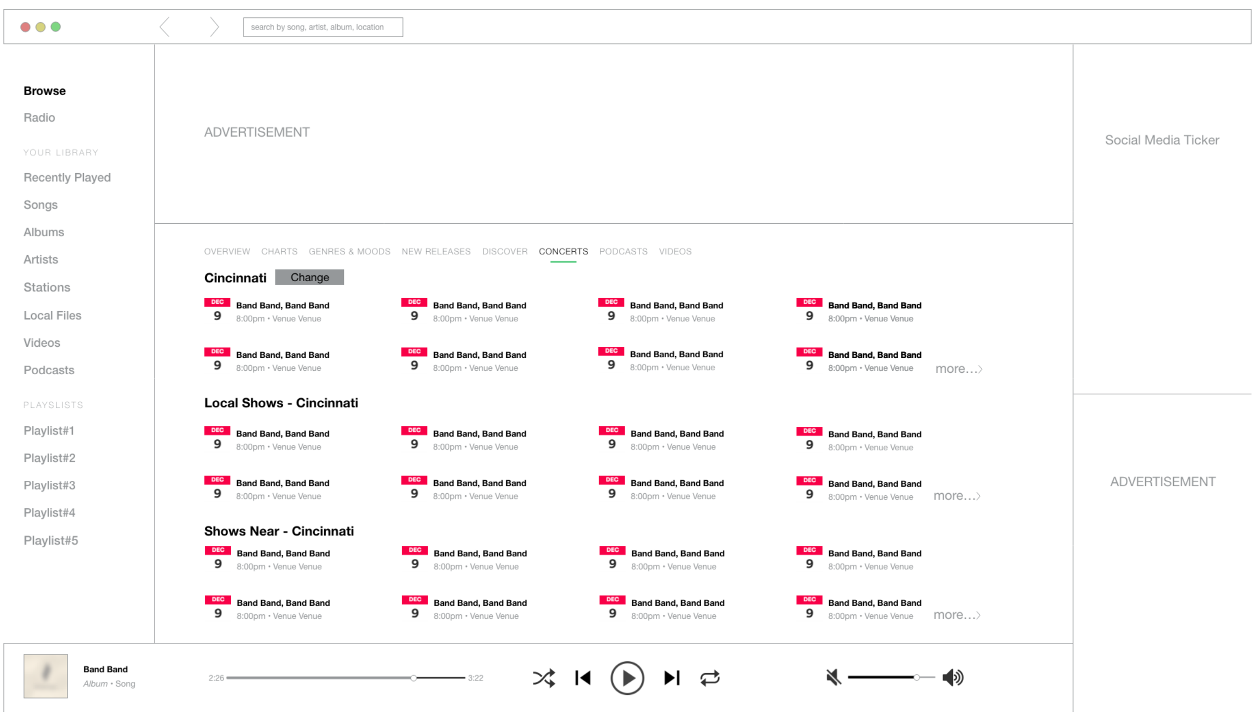

figure 6.4.4 – Trojan Horse Concerts Page

Localization

My second approach to redesigning streaming space is to add a localization feature. Users could click a new tab just below "Browse" and "Radio" that would change the offerings from worldwide to a select location. This section would appropriate the same as the rest of the app but without national acts and advertisers. Instead of national brands like Miller Lite or Dollar Shave Club, this design features local advertisers and recording artists. The user's profile or device would update the location of the user, or the user could reassign their location however they want (maybe they really like the Toronto music scene). Figure 6.4.5 illustrates what this page would look like. All the artists featured would be local artists, as would the shows listed in the right-hand column. By clicking on the location icon next to Cincinnati (on the left), users could change their location.

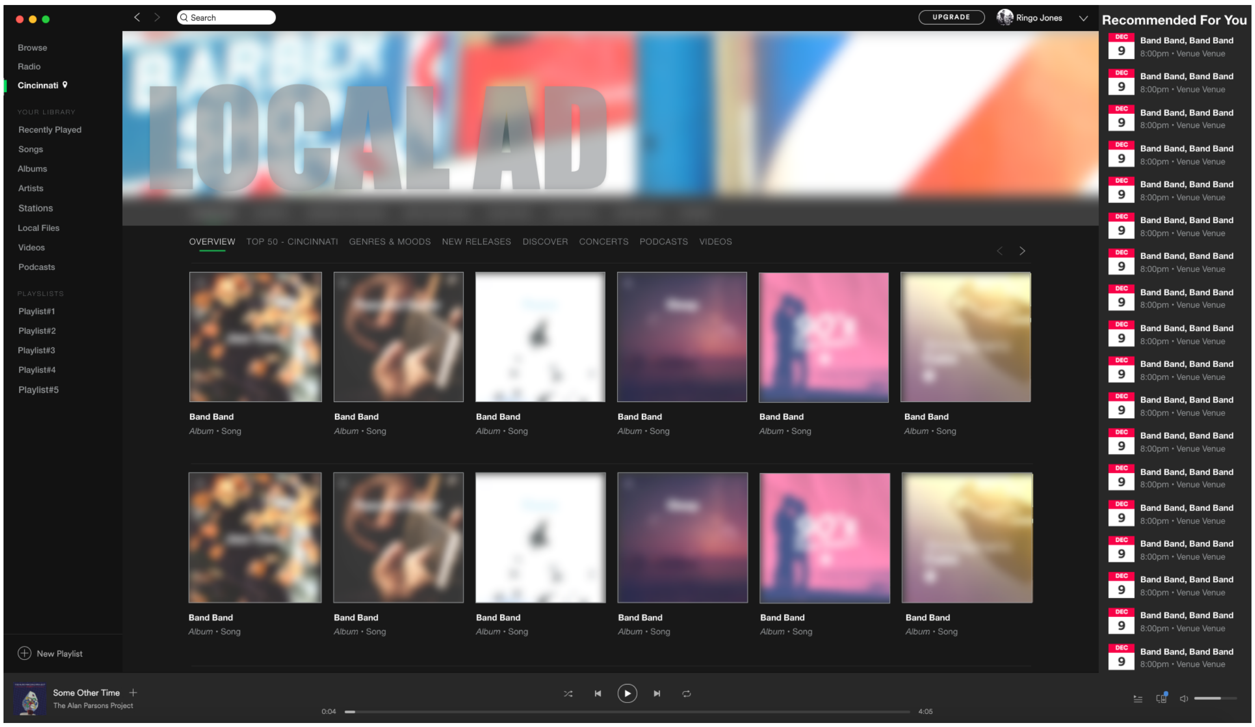

figure 6.4.4 – Localization

6.5 Focus Group

Participants
I convened a four-person focus group to critique and review my design intervention at my home in Cincinnati, Ohio. Two of the participants were female; the other two were male. All four participants were music consumers with varying interests in local music and streaming services. One listener seldom listened to local artists while another rarely listened to national acts. The other two participants were somewhere in the middle but also opposite. Two of the participants were also local Cincinnati musicians. The ages ranged from 24 to 40 years old. A fifth focus group attendee was scheduled to participate but canceled due to a scheduling conflict. Both concepts were presented to participants.

Data
Participants were receptive to both ideas but tended to favor the "Trojan Horse" option over the added "Localization" feature. The musicians thought the localization tab could be useful but

questioned whether regular listeners would use the feature. One of the non-musician participants added:

> *"I don't know if I would go to this tab and listen to local bands, but if it were just mixed in, then yeah, cause that happens to me all the time. I'll just be listening and then I'll hear something I like, and often times a bunch of songs that I like from that band"*

This was an initial concern when I was designing this feature. What would be the attraction to a "locals only" section outside of one or two acts with whom the listener already has a relationship? Another participant likened the "Trojan Horse" option to college radio:

> *"How WNKU was, I would play it, it would throw things at me and I would pick things out that I liked or didn't like and research 'em and find 'em…It's better to have a mix cause then people don't know, they just listen. Whereas a block of two hours where it's just local music, people might tune out."*

This observation speaks to the importance of gatekeepers even in an on-demand space. There's a certain level of legitimacy listeners accredit to acts that are nationally known. Local artists have to prove themselves before the listener will accept them as equal. Even if one artist stands out as superior, it's easy to dismiss them when they're bunched together with other local artists. Spotify can offer a level of validation by including local artists in the same spotlight as national artists.

The other topic that came up was music discovery and the importance of local music. Some listeners take great pride in knowing obscure, underground artists. These features may make music discovery even more natural. One focus group participant was exceptionally burnt-out with national acts and fads:

> *"I like the fact that they weren't national acts, I like that they're people like me, just trying to make music…it's more interesting to me know local music than know what everyone else likes."*

There is a national movement to be unique and to buy local; it's no surprise that some of the tenets of the "buy local" movement have infiltrated music consumption.

Unintended Uses

When I revealed the design to the two musicians in the focus group they started thinking of different uses for the features. One participant suggested bands could use these features for booking tours. By changing the location, local artists could research other local artists in different towns and connect with like-minded performers. They also pointed out that Spotify statistics are more reliable than social media numbers. A local artist may have thousands of "likes" on Facebook, but if they don't have thousands of streams on Spotify, chances are their Facebook numbers are artificially inflated.

Similarly, talent managers or record labels could use the feature to scout new artists. Some of this is already done. Talent scouts regularly consult streaming data looking for the "next big thing," because in the current state of the industry nothing is guaranteed and record labels can't risk a flop.

Revisions
All participants agreed that a slider bar that could increase or decrease the number of local artists in their feed would be desirable.

Limitations
The scope of this focus group is limited because I was only able to convene one small group after creating the design intervention. If this research were to be conducted in the future, I would recommend multiple groups of both musicians and music consumers and more diversity among the participants.

Lastly, I'd like to have more focus groups at the beginning of the research process and the end. The focus group I used for the design intervention was not only insightful but also gave me lots of new ideas for researching and designs going forward. Plus, their enthusiasm re-energized me because it reminded me this topic is important to other people.

6.6 Conclusions

All focus group participants agree there is room for improvement in the way streaming services treat local artists. The most popular alteration was the "Trojan Horse" option, where a tweak in the streaming algorithm presents users with more local options inside the current app. Participants suggested adding a slider feature that could vary the number of local artists into the user interface. Some users would like zero local interjections; others would prefer an entirely local experience.

Figure 6.6.1 charts the features and goals of each platform. The "Trojan Horse" plug-in is the only platform to check all of the boxes, most notably all of the added local features.

	Spotify	**YouTube**	**Pandora**	**Trojan Horse**	**Localization**
On-Demand Streaming	X	X		X	X
Personalized Radio	X		X	X	X
Concert Listings	X			X	X
Additional Info	X		X	X	X
Charts	X			X	X
Recommendations	X	X	X	X	X
Search by Location				X	X
Local Concert Listings				X	X
Local Charts				X	X
Local Recommendations				X	X
Local Artists Only option				X	X
Local mixed with National				X	

figure 6.6.1 – Streaming Platform Comparison Chart

6.7 Discussion

Even though there is a consensus among the participants of the focus group, the implementation of any redesign is risky. There are questions of whether users will like the idea, and possibly even show interest initially, but over time revert to their old listening habits. Of course, there's also a possibility that users will love the new features, become more interested in local acts, and shun labels entirely.

One participant questioned how major labels would respond, to which another participant replied: "They'd probably hate it." There is a Robin Hood aspect to the whole redesign – Take away some of the privileges and advantages that wealthy national acts have and redistribute them amongst the poor local acts. I don't foresee this design being very popular with the music elite.

Finally, how would advertisers respond. Hopefully, more users subscribe to premium services and advertisers won't have the same clout they once had. But, it may not matter. As long as listeners are still using the platform advertisers will be there to advertise to them.

Chapter 7: Conclusions & Discussion

7.1 Conclusions

A recording artist needs roughly 160 Spotify streams to equal one iTunes digital sale ($.00437/stream x 160 streams = $.70). Even the most zealous fans are unlikely to stream their favorite song 160 times. Streaming does not adequately compensate recording artists. Local artists are exceptionally vulnerable to low pay because the design of streaming services puts the interests of major label national/international acts ahead of local/regional acts. The absence or sale of community radio stations has left an underserved local audience. My suggested design intervention is to redesign streaming spaces, so they favor and promote music that is local to the listener. A tweak to the streaming algorithm would put local artists on the same pedestal as national acts. By serving users local content it may attract new users to the streaming service, that are more likely to spend money on the service and the artists, aficionado fans (Nielsen, 2013).

Some features could be added immediately, including "search by city" feature that enables users to use the search box to discover talent from a specific location. Streaming services could also expand the use of the Songkick widget to highlight local music events, not just arena superstars. By featuring live music events more heavily it may encourage heavy streamers, who attend significantly fewer concerts than medium or light streamers, to attend more live music events.

Finally, local artists should raise the cost of admission to local shows. Music consumers are willing and expect to pay more but local artists continue to undercharge them. I recommend raising ticket prices to an average of $10 for concerts that primarily feature local/regional talent.

7.2 Discussion

Polish

If local artists want to compete on a national scale, they need to deliver a product worthy of the competition. In chapter 5, I discussed how radio was not only a powerful tool for exposure but also validation. Without a platform gatekeeper like radio, streaming services let the audience decide who is worthy of attention.

Local artists must elevate their songwriting, production quality and branding to the same level of national acts. With the proliferation of recording and design software this is realistic. Artists may need to invest more time and money in the recording process to make their songs sound as rich as their national competition. It may mean hiring designers for their album art or show posters instead of relying on artistic friends who will do it for free (hopefully, they can still retain their friends). It may mean packing up all the gear and moving into a high-end production studio instead of recording in the lead singer's basement. Before local artists can stand out for their talent and story, they need to deliver a product that looks, sounds and feels like a national act.

Lack of resources, which may be time, money, knowledge, creativity or a combination of things, restricts local artists. But, doing the little things like making sure their website and show listings are up-to-date or adding their catalog to the different streaming platforms is essential for future financial success.

Local Stigma

In the design intervention focus group, one participant was particularly interested in the reputation of local artists as a whole. Their belief being, the general public has a negative perception of local music. Some music consumers may view local music as inferior or amateur based on past experiences or isolated incidents. It would be interesting and insightful to research attitudes toward local recording artists.

Major Label Reaction

Enacting features of the design intervention would likely cut into the revenue stream of major record labels. Major labels may react by boycotting the streaming platforms or demanding preferential treatment because their artists are generating the traffic that trickles down to everyone else. It may be advantageous for major labels to start scouting talent that receives the highest dividends from the new features rather than fighting it. If the past is an indicator of their actions though, that is unlikely.

Music Deserts

A few survey respondents added notes in the additional comments section about being from an area with no live music or strictly cover bands. I would be interesting in researching these communities and their music consumption habits.

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Appendices

Appendix A: IRB Approval

May 18, 2017

To: Richard Jones and Dr. Dennis Cheatham
(jonesre3@miamioh.edu; cheathdm@miamioh.edu)
Art

Re: *Little League: Local music scenes and the non-traditional venue*

Project reference number is: 02521e
(please refer to this ID number in all correspondence to compliance administration)

The project noted above and as described in your application for registering Human Subjects (HS) research has been screened to determine if it is regulated research or meets the criteria of one of the categories of research that can be exempt from approval of an Institutional Review Board (per 45 CFR 46). The determination for your research is indicated below.

The research described in the application is regulated human subjects research, however, the description meets the criteria of at least one exempt category included in 45 CFR 46 and associated guidance.
The Applicable Exempt Category(ies) is/are: 2

Research may proceed upon receipt of this certification and compliance with any conditions described in the accompanying email message. When research is deemed exempt from IRB review, it is the responsibility of the researcher listed above to ensure that all future persons not listed on the filed application who i) will aid in collecting data or, ii) will have access to data with subject identifying information, meet the training requirements (CITI Online Training).

If you are considering any changes in this research that may alter the level of risk or wish to include a vulnerable population (e.g. subjects <18 years of age) that was not previously specified in the application, you must consult the Research Ethics & Integrity Program before implementing these changes.

Exemption certification is not transferrable; this certificate only applies to the researcher specified above.

All research exempted from IRB review is subject to post-certification monitoring and audit by the compliance office.

Best of luck with your research,
Jennifer Sutton
--

Jennifer Sutton, MPA, CIP
Associate Director of Research Ethics & Integrity
Office for the Advancement of Research and Scholarship
Miami University
102 Roudebush Hall
Oxford, OH 45056
Phone: 513-529-0454
http://www.MiamiOH.edu/compliance

Appendix B: Musician Survey

Age:
• 18-25
• 26-35
• 35-45
• 46+
• prefer not to answer

Gender:
• male
• female
• prefer not to answer

Location (City, State): ____________________

Genre:
• Rock, blues, indie, alternative
• Hard rock, heavy metal, punk
• Folk, Singer/Songwriter, Acoustic, Americana
• Electronic, Dance
• World, Reggae
• Hip Hop, Rap
• Soul, R&B, funk
• Country, Pop Country
• Other

The following questions pertain to local/hometown performances

How many LOCAL shows do you perform per year?
• 3 or less
• 4-6
• 7-9
• 10+
• prefer not to answer

What's the average attendance at one of your LOCAL shows?
• 30 or less
• 31-60
• 61-99
• 100+
• prefer not to answer

Average number of acts for a LOCAL show?
• 1

• 2
• 3
• 4 or more
• prefer not to answer

Most common door charge for LOCAL show?
• Free or donation
• $5 or less
• $6-10
• $11-20
• $20+
• prefer not to answer

Average payout from LOCAL shows?
• $100 or less
• $101-150
• $151-200
• $200+
• prefer not to answer

Average merchandise sales for a LOCAL show?
• $50 or less
• $51-100
• $101-150
• $151-200
• $200+
• prefer not to answer

The following questions pertain to non-local/touring/road performances

How many NON-LOCAL shows do you perform each year?
• 12 or less
• 13-24
• 25-36
• 37-49
• 50+
• prefer not to answer

What's the average attendance at one of your NON-LOCAL shows?
• 30 or less
• 31-60
• 61-100
• 100+
• prefer not to answer

Average number of acts on a NON-LOCAL show?

• 1
• 2
• 3
• 4 or more
• prefer not to answer

Most common door charge for NON-LOCAL show?
• Free or donation
• $5 or less
• $6-10
• $11-20
• $20+
• prefer not to answer

Average payout from NON-LOCAL shows?
• $100 or less
• $101-150
• $151-200
• $200+
• prefer not to answer

Average merchandise sales for a NON-LOCAL show?
• $50 or less
• $51-100
• $101-150
• $151-200
• $200+
• prefer not to answer

The following questions pertain to non-traditional venues/performances, which includes living rooms, basements, house parties and workspaces (places that do not have a liquor license or host live music regularly)

How many NON-TRADITIONAL shows do you perform each year?
• 5 or less
• 6-10
• 11-20
• 21-50
• 50+
• prefer not to answer

What's the average attendance at one of your NON-TRADITIONAL shows?
• 20 or less
• 21-50
• 51-80
• 80+

• prefer not to answer

Average number of acts on a NON-TRADITIONAL show?
• 1
• 2
• 3
• 4 or more
• prefer not to answer

Most common door charge for NON-TRADITIONAL show?
• Free or donation
• $5 or less
• $6-10
• $11-20
• $20+
• prefer not to answer

Average payout from NON-TRADITIONAL shows?
• $100 or less
• $101-150
• $151-200
• $200+
• prefer not to answer

Average merchandise sales for a NON-TRADITIONAL show?
• $50 or less
• $51-100
• $101-150
• $151-200
• $200+
• prefer not to answer

The following questions pertain to revenue from online sales

Average online (iTunes, Bandcamp, etc.) sales per month (include digital and physical sales)?
• $20 or less
• $21-50
• $51-100
• $100+
• prefer not to answer

Average streaming (Spotify, Tidal, YouTube, etc.) royalties per month?
• $20 or less
• $21-50
• $51-100
• $100+

• prefer not to answer

Any additional comments? ___________________________

Would you like to receive the results of this survey? Follow this link to fill out the contact form (your contact information will not be linked to your responses).

Appendix C: Musician Interview

By this time, you have read the research description and consent form, do you have any questions?

I would like to reiterate your participation is completely voluntary and you can stop or withdrawal from the process at any time. This interview/focus group will take approximately 60 minutes. Is that okay with you?

Are you ready to begin?

1. Describe the music you play.

2. Describe the Cincinnati music scene?
    a. How does your act fit into the Cincinnati music scene?
    b. How would you describe Cincinnati music fans?
    c. How are the fans different from other locations?
    d. How are the other bands?
    e. How are the venues?

3. How would you rate your access to local music venues in terms of communication and booking? And why?
    a. How well do they compensate?
    b. Do they prefer door deals, guarantees, % of bar, or mixed?
    c. Are they receptive to new ideas?
    d. Do they welcome out-of-town acts?

4. How would you rate your access to local music venues in terms of communication and booking? And why?
    a. How well do they compensate?
    b. Do they prefer door deals, guarantees, % of bar, or mixed?
    c. Are they receptive to new ideas?
    d. Do they welcome out-of-town acts?

5. Have you ever played a non-traditional show? Can you describe it?
    a. How was the crowd? (Size? Attentiveness? Did they buy merchandise?)
    b. How was pay? Better or worse than a traditional show?

6. INDUSTRY
    a. How would you rate your access to local music publications, i.e. CityBeat, Cincymusic? And why?
    b. How would you rate your access to local radio stations? And why?
    c. How would you rate your access to recording studios or recording equipment? And why?
    d. How would you rate your access to distribution of your content? And why?
    e. How would you rate your access to record labels? And why?

f. How would you rate your access to managers, publicists and booking agents? And why?

7. How would you rate your access to mentors? And why?
    a. Do you have many friends also playing in the scene?

8. How would you describe success as a musician?
    a. What are your musical goals?

9. What would you say is the largest contributor to financial success as a musician?

10. What would you say is the largest contributor to creative freedom as musician?

11. What is biggest obstacle your act faces internally?

12. What is the biggest obstacle your act daces externally?

13. Create three rules for local musicians.

14. Is there anything you would like to add?

Appendix D: Interview Consent Form

MIAMI UNIVERSITY
OXFORD, OH • EST. 1809

Little League: Local Music Scenes and the Non-Traditional Venue
Participant Consent

This study examines home concerts in the Greater Cincinnati music scene and the significance of non-traditional performance venues. You are not required to participate in this study; it is entirely voluntary. If you decline to participate in the study, it will not affect your music relationships or social standing in any way.

If you choose to participate, here are some important things to know about your involvement in the study:

- **The researcher will request to talk with you for an interview lasting approximately one hour. This interview will occur at a place of your choosing, over the phone, email, skype or whatever is most convenient for you. The interview will be audio-recorded (if possible).**
- **The researcher will request basic demographic information about you, but your confidentiality is protected. The researcher will not use your name or any identifying information about you in his reports about the study.**
- **You are free to decline to be interviewed or to end your participation in the interview at any time.**

You have rights as a participant in this study. If you have questions about the study, please contact the lead researcher, Richard "Ringo" Jones, by phone at 513-304-7625; or email jonesre3@miamioh.edu.

For questions or concerns about your rights as a research subject please contact the Research Compliance Office at Miami University: (513) 529-3600 or humansubjects@miamioh.edu.

I ____ understand my rights and protections as a participant, and **I agree to participate** in this study for purposes outlined above. **I give my permission to be interviewed and for that interview to be audio-recorded.**

Date ______________________________

Appendix E: Survey Consent Form

Research Consent Information:

The purpose of this research is to examine the Greater Cincinnati independent music scene and relationships between artists and venue operators. This research is being conducted as part of the graduate degree program of Richard "Ringo" Jones under the guidance of Dennis Cheatham at Miami University. Invitations have been sent by email or other messaging services to qualified participants. Open invitations have been posted on social networking sites such as Facebook and Twitter. Participation in this research is restricted to persons 18 years of age or older.

Completing the survey should take about 10 minutes. Your participation is voluntary, you may skip questions you do not want to answer, and you may stop at any time. The survey does not request information that would explicitly identify you. If you inadvertently include identifying information, such information will be removed from stored data. Only the researcher and faculty advisor will have access to individual responses. Results of the survey will only be presented publicly as aggregate summaries. If you would like to receive a report of the general results of this project please click on the link at the end of the survey which will take you to a separate form to send us your contact information. The research survey and the contact survey are not linked.

If you have any questions about this research or you feel you need more information to complete this survey, you can contact me or my faculty advisor at jonesre3@miamioh.edu; dennis.cheatham@miamioh.edu. If you have questions or concerns about the rights of research subjects, you may contact the Research Compliance Office at Miami University at (513) 529-3600 or humansubjects@miamioh.edu.

---- Thank you for your participation, Richard "Ringo" Jones.
Click here to proceed to the survey

Appendix F: Recruitment Flier/Poster

INDEPENDENT MUSICIANS NEEDED

SHAPE THE EVOLUTION OF YOUR LOCAL MUSIC COMMUNITY

MIAMI UNIVERSITY

Graduate MFA research on DIY performance space & independent music communities

survey.com survey.com survey.com survey.com survey.com survey.com survey.com survey.com survey.com survey.com survey.com survey.com survey.com survey.com

Appendix G: Music Consumer Survey

Age:
• 18-25
• 26-35
• 35-45
• 46+
• prefer not to answer

Gender:
• male
• female
• prefer not to answer

Location (City, State): ____________________

Preferred Genre:
• Rock, blues, indie, alternative
• Hard rock, heavy metal, punk
• Folk, Singer/Songwriter, Acoustic, Americana
• Electronic, Dance
• World, Reggae
• Hip Hop, Rap
• Soul, R&B, funk
• Country, Pop Country
• Other

For the purposes of this survey LOCAL/REGIONAL acts are those from your town/region or performing with acts from your town/region, without national/international reach (i.e. they're not on radio, TV or in Rolling Stone). For example, Walk The Moon is from Cincinnati but their reach would define them as a NATIONAL act.

The following questions pertain to your listening and buying habits

How do you consume non-live music by percent?

- CD
- Vinyl
- Radio/Television
- Digital but not streaming (phone, mp3 player, computer, etc.)
- Streaming (Spotify, Apple Music, Amazon, etc.)
- YouTube
- Website (soundcloud, bandcamp, etc.)
- Other

How much do you spend on physical music (CD, Vinyl, cassette, etc.) from LOCAL/REGIONAL acts per year?

- $0
- less than $20
- $20-$49.99
- $50-$99.99
- $100 or more
- prefer not to answer

How much do you spend on physical music (CD, Vinyl, cassette, etc.) from NATIONAL acts per year?

- $0
- less than $20
- $20-$49.99
- $50-$99.99
- $100 or more
- prefer not to answer

How much do you spend on digital music (iTunes, Amazon, Bandcamp, etc.) from LOCAL/REGIONAL acts per year?

- $0
- less than $20
- $20-$49.99
- $50-$99.99
- $100 or more
- prefer not to answer

How much do you spend on digital music (iTunes, Amazon, Bandcamp, etc.) from NATIONAL acts per year?

- $0
- less than $20
- $20-$49.99
- $50-$99.99
- $100 or more
- prefer not to answer

Pick three: What determines your likelihood to buy LOCAL/REGIONAL music/merchandise?

- their music
- your relationship with the act
- their live performance
- price
- artwork/design
- their personality/brand

- other _____________

The following questions pertain to live performances

How many concerts performed by a LOCAL/REGIONAL act do you attend per year?
- 0
- 1-3
- 4-6
- 7-9
- 10+
- prefer not to answer

How many concerts performed by a NATIONAL act do you attend per year?
- 0
- 1-3
- 4-6
- 7-9
- 10+
- prefer not to answer

How much do you spend on concerts performed by LOCAL/REGIONAL acts per year?
- $0
- less than $20
- $20-$49.99
- $50-$99.99
- $100 or more
- prefer not to answer

How much do you spend on concerts performed by NATIONAL acts per year?
- $0
- less than $50
- $50-$99.99
- $100-$199.99
- $200-$249.99
- $250 or more
- prefer not to answer

How much do you EXPECT to spend to see a LOCAL/REGIONAL act perform?
- $0 or donation
- $5 or less
- $5-$10
- $10 or more
- Prefer not to answer

How much are you WILLING to spend to see a LOCAL/REGIONAL act perform?

- $0 or donation
- $5 or less
- $5-$10
- $10-$15
- $15-$20
- $20 or more
- Prefer not to answer

Have you ever attended a house concert for a LOCAL/REGIONAL act?

- Yes
- No
- Prefer not to answer

Have you ever attended a house concert for a NATIONAL act?

- Yes
- No
- Prefer not to answer

Pick three: What determines your likelihood to attend a LOCAL/REGIONAL concert?

- their music
- your relationship with the artist
- their live performance
- price
- venue/location
- support acts
- name recognition
- advertisements
- their videos
- their personality/brand
- other _____________

Any additional comments? ____________________________

Would you like to receive the results of this survey? If so, please provide your email. (your contact information will not be linked to your responses).