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Control, curation and musical experience in streaming music services

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The growth and popularity of music streaming are generally seen as win for music consumers, giving them greater freedom and virtually limitless access to musical content. This article offers a different view. It examines how four prominent music streaming services position themselves in the marketplace, based on their interfaces, the quality of their curatorial devices, the identity projected for users and the control users have over their music (or, lack thereof). We argue that, ultimately, streaming services are in the business of creating branded musical experiences, which appear to offer fluid and abundant musical content but, in reality, create circumscribed tiers of content access for a variety of scenarios, users and listening environments.

Introduction

In recent years, the recorded music industries have shifted away from the sale of recordings (e.g. physical albums or downloaded MP3s) and toward subscription models that sell access to vast collections of musical content. This shift is the result of well-known but still significant economic, technological, and cultural changes (Anderson 2014; Burkart 2013; Garofalo 1999; Burkart and McCourt 2006), and presents listeners with a dizzying number of possibilities regarding both the music they can readily hear and the platforms through which they might hear it. Superficially, streaming services appear to realize Goldstein’s (1994) ‘celestial jukebox’ – the dream of any music imaginable available at any moment through the press of a button. Yet as these services foster new cultures, practices and economies of musical circulation and consumption, they also create a crowded marketplace, and challenge the norms of media consumption in an era of digital streaming.

While streaming appears to be growing as downloads and CD sales decline (Karp 2014; IFPI 2014), streaming services must still convince hesitant consumers to adopt this technology as their primary method of musical consumption. As they do so, they must also distinguish themselves from their competitors – a tricky task in an era of limitless content. How might a service stand out when there are myriad ways for listeners to obtain music on demand? Apart from catalog differences – which may be minimal at the outset – how else do services make streaming a valuable experience? In light of these issues, this article examines how music streaming providers position their services, and explores what these maneuvers tell us about the state of media circulation at a moment of rapid technological change.

We begin with the history and significance of streaming as both a media technology and a metaphor for unlimited access to content, and explain how new music services capitalize on these ideas and technologies. We then study four representative streaming services – Spotify, Songza, Rdio and Beats (now part of Apple Music) – paying particular
attention to how they position themselves vis-à-vis one another, pre-digital norms of distinction within popular music (e.g. genres or taste cultures) and conventions birthed in the era of digitization (e.g. human vs. machine curation or transferability). Ultimately, we suggest that digital music services no longer sell discrete musical objects, nor do they focus exclusively on content offerings. Instead, services sell branded musical experiences, inviting consumers to see themselves and their attitudes, habits and sentiments about music reflected by the service they choose to adopt. Although these branded musical experiences appear to offer fluid and abundant musical content, in reality, streaming services function more like cable television providers, creating tiers of content access for a variety of scenarios and users. In an era where free music seems to be everywhere, the parceling up and meting out of ‘everywhere’ has become the driving commercial imperative (Burkart and McCourt 2006; Mosco 1989). While we focus specifically on music, our cases speak to larger challenges for all kinds of media content as digital streaming models take hold across the cultural industries.

Streaming meanings

The last year has marked a significant shift in the consumption of digital music. By the end of 2014, sales from pay-per-download models such as iTunes were down about 8% from the prior year while streaming revenues (subscription and ad-supported) were up 39% (IPFI 2015). Streaming, cited by one observer as a ‘salvation’ for major labels, now comprises approximately US$1.57BN of the industry’s US$6.85BN global digital revenues, with all major markets showing notable growth (IPFI 2015). The hype around streaming services is not just economic, but has also been identified by tech analysts as a ‘post-download era’, with streaming as ‘the third destructive wave for the music industry in the last decade and a half’ (Farrell 2014; Thompson 2014). Streaming, in other words, is not just a technical form of transmission, but a key metaphor for the flow of information in the digital age.

Yet streaming has never held one meaning or indexed one practice; it implies freedom and bounty as well as limits and constraints. The OED defines ‘stream’ as ‘flowing copiously’, ‘overflowing, running or dripping with moisture’; most uses suggest mobility, motion or continuity, regardless of whether the stream is liquid, light, data or other matter (2014). However, other definitions provide alternate, even opposing, meanings. In the 1700s and 1800s, streaming described a mining practice: ‘the washing of ore…from the detritus with which it is associated’ — or dividing the precious from the worthless. This connotation can also be seen in the practice of ‘streaming’ for education, which involves dividing students into ability-dependent paths, or in a word like ‘streamline’. Rather than a continuous flow, these forms of streaming suggest division, separation and improved results through removing the extraneous.

Towards the end of the 1970s, ‘stream’ surfaced in articles related to computing technology, referencing tape drives that provided backup storage without interruption (OED 2014). In the late 1980s, streaming started to refer specifically to media technologies for delivery and playback of a digital file without the need for full downloading (OED 2014). Although radio, television broadcasting and cinema might anachronistically be considered forms of streaming, the term was not routinely applied to those media until the advent of digital services and technologies.¹ That said, the economic models behind, and the user experience of, these older media suggest that what we currently understand as streaming media is far from entirely new (Dixon 2013). Not simply an instance of remediation (Bolter and Grusin 1999), of new media re-fashioning older media forms, streaming
is an example of what Jonathan Sterne has called mediality, or the complex ways communication technologies routinely cross reference and refer to one another in form or content (Sterne 2012, 9). When considering media practices like streaming that persist across historical periods, despite widely different hardware and software technologies, mediality turns the researcher’s focus toward a medium’s ‘articulation with particular practices, ways of doing things, institutions and [...] belief systems’ (Sterne 2012, 10).

Businesses that resemble today’s music streaming services came online in the mid-1990s. First to arrive were companies that rebroadcast traditional media, like AudioNet (later known as Broadcast.com), which streamed access to sports broadcasts and allowed users to select the exact songs they wanted to hear. Progressive Networks (Real Networks) was the second predecessor, introducing Real Audio in 1995. The program broke audio files down and then reassembled them on the user’s machine, allowing users to listen to a file in ‘real’ time even over slow modems (Rothenberg 1999). Since these early attempts, a number of streaming services tried to gain footing in the market, though few managed to seriously compete with Apple’s iTunes a-la-carte download model for the first decade of the 2000s.

Like the ‘cloud’, the streaming metaphor obfuscates how these new services inhibit the circulatory flow of music, altering longstanding notions of property and rights associated with the music commodity (Morris 2011). Technologies that rely on true streaming, for example, mean no copy of the original files ever resides on the user’s computer, making one’s library entirely dependent on a subscription to the service and/or a connection to the Internet. Although users may not encounter this as a limitation, it transforms recorded music from a durable and copiable good into ‘single use products (streams) that perish as they are consumed’ (Anderson 2011, 160). This is ironic considering the public outcry in the early 2000s against digital rights management (DRM), which most major labels and music providers ultimately eliminated from their products and stores. While DRM was loathed for preventing users from transferring files to other devices, making repeated copies of files and editing files for other purposes, streaming is largely celebrated despite these very same restrictions. Moreover, even if we ignore the impediment streaming places upon ownership, significant licensing issues prevent streaming services from hosting ‘everything’, a point Tryon (2013, 2) has made in reference to video streaming.

These changes have seemed less radical than they might have otherwise, however, due to the ways streaming feels familiar to many users — resembling radio in its dematerialized musical distribution and its dependence on revenue sources other than sales. Like streaming, radio was once a marvel for its ability to deliver a plenitude of music (Douglas 2004) and, with the introduction of features such as DJs, formats and listener requests, has a long history of experimenting with varying degrees of curation, listener agency and control (Razlagova 2013). However, the kind of streaming offered by emergent music services is unique not just for its array of possible ‘stations’, but also for how it collapses boundaries among distribution, exhibition and consumption. Because consumption happens at the point of distribution and acquisition, musical streaming services have profuse information about consumer listening habits and are able to readily feed that information back into the consumption experience — much like Netflix, where ‘increased surveillance’ provides studios and other interested parties with better marketing information (Tryon 2013, 14).

As streaming services blur previously distinct industry practices, outlets that once primarily concerned themselves with distribution are now increasingly in the business of promotion, curation, user experience and analytics. The importance of acquiring, analyzing and selling musical data lays the groundwork for what Wikstrom (2009) and others
have called the ‘new music economy’, where services push features like social connections and contributions (between fans and artists, fan-generated reviews and playlists, etc.) in lieu of sales of discrete objects. Sociality supplies meaningful feedback for streaming music services and creates value ‘based on the expropriation of free cultural, technological, social, and affective labor of the consumer masses’ (Zwick, Bonsu, and Darmody 2008, 166).

Streaming’s aquatic and luminous connotations also play on the notion of music and media as a kind of ‘utility’. Music, some argue, should be akin to water or electricity, where consumers pay a monthly fee in return for always on, always utilizable entertainment (Kusek and Leonhard 2005). Streaming services have also eagerly promoted a vision of the future where streaming provides a totalizing ‘musical atmosphere’ to satisfy any musical need at any moment. Spotify CEO Daniel Ek, for instance, has said Spotify is ‘not in the music space — we’re in the moment space’ and that he envisions a future in which a ‘musical soundtrack, tailored for you, fitting for the moment’ encircles us at all times (Seabrook 2014; Sloan 2013). On the one hand, then, streaming services move us toward what Kassabian (2001, 2013) presciently called ubiquitous music and hastens the shift toward ubiquitous listening: a networked sense of self that is always connected to our sounded environment. At the same time, discourse about constant, free-flowing and abundant access to all music all the time readily feeds into notions of control, curation and stemming the tide — a process carried out for us, expertly and discretely, by our service of choice.

In sum, though streaming places the listener within a finite inventory, the ‘stream’ becomes a metaphor for musical omnipresence and inexhaustible choice — even if all content is not coming to us at all times. Just as ‘stream’ contradictorily suggests continuity and flow, as well as separation and division, streaming services represent both the utopian hopes about musical choice embodied in Goldstein’s (1994) ‘celestial jukebox’ as well as some of the critiques of the term, along lines of power and control that Burkart and McCourt (2006) describe. This paradox is central to how streaming services market themselves and the modes of musical consumption they offer. Indeed, if these services were truly all equally limitless, on what grounds could they compete? If the stream was as fluid as service providers imply, what possibilities would there be for differentiated levels of service and profit? As we explore later, streaming services smooth over these inconsistencies by presenting branded musical experiences that target certain styles of musical access, discovery and use as they vie for consumers to buy into their ethos of musical control.

Music streaming services as branded musical experiences

The term ‘branded musical experience’ is a recognition of how the principles and practices of branding have pervaded contemporary life. Defined simply, ‘brand’ refers to the name and identity that distinguishes one product or service from another in the marketplace. However, within an increasingly promotional culture (Aronczyk and Powers 2010; McAllister and West 2013), brands have become ‘part of the propertied ambience of media culture in which life unfolds’ (Arvidsson 2006, 13). Branding, in turn, has evolved into an essential strategy for the creation and maintenance of image, reputation, character and value across a range of objects, spaces and media. Moreover, as space emerges as a critical terrain for brand engagement (Moor 2003), brands have sought to exploit multiple levels of sensory input, including but not limited to musical sound (Powers 2010; Meier
in order to ‘reconstruct the consumer as an affective, desiring, pleasure-seeking body as they move through consumption spaces’ (Wood and Ball 2013, 54).

Streaming services represent an ambitious effort toward re-imagining the consumption of music as an experiential brand. They, therefore, engage in a process of brand differentiation that functions to convince potential customers that a particular service corresponds to how they consume music in everyday life and to persuade music users that ‘the stream’, more generally, should be their conduit into a ubiquitous musical atmosphere. To explore the implications of this process, we examine four archetypal services: Songza, Beats/Apple Music, Spotify and Rdio. We selected these four because we wanted a mix of independent and corporate ownership; variance in terms of age of service and size of subscription base; and services that would show a range of branding approaches. That said, we write this fully aware that the streaming universe remains in constant flux, with new players, such as Jay-Z’s Tidal, continuing to enter the fold; mergers, buy-outs and failures are still possible. In light of this, our analysis provides broad observations about how musical consumption, and media consumption more generally, is being positioned in the age of streaming. Our primary research materials include a close reading of the interfaces, features and functions of the programs; a large collection of journalistic coverage; and analyses of each company’s marketing materials (e.g. press releases, advertising, websites, etc.).

These four services each have different lineages. Songza was founded in 2007 as stream-only search engine. After transitioning to a free-of-charge streaming service for predetermined musical playlists, it was purchased by Google in 2014 (Sisario 2014b, ‘Google in’; Walker 2007) and, in addition to operating as a stand-alone in web browsers and mobile apps, it also delivers the ad-supported ‘radio’ within Google Play Music. In 2014, rapper and entrepreneur Dr Dre and producer Jimmy Iovine launched Beats Music as a corollary to the popular line of headphones by the same name. Apple acquired the service for $3BN later that year (Chen 2014) and, at the time of this writing, merged it into a revamped version of iTunes, now called Apple Music. Spotify is currently the number one streaming music service in a number of countries, claiming over 40 million active users and 10 million paying subscribers in 56 markets around the world (Spotify Hits 10 Million ... 2014). Founded in the mid-2000s, Spotify offers ad-free paid subscriptions or free ad-supported accounts that allow users to stream music as well as manage local libraries of music files through web, desktop, mobile applications and other home stereo technologies. Finally, Rdio launched in 2010 and claims to offer 30 million tracks to users in over 51 countries. Founded by Janus Friis and Niklas Zennstrom, the creators of the file-sharing service Kazaa and voip service Skype (Andrews 2009; Stone 2009), Rdio started as a subscription-only service but now offers similar tiers as Spotify.

We explore these services along four broad categories: interface, quality, identity and control. By interface, we include all that greets a user when she/he starts up a service, including design, features, content organization, navigational options, etc., as well as the affective pull this combined assemblage has on users. Quality indicates the unique characteristics the service offers in terms of their musical library and curation. Services also attempt to invite a certain kind of musical consumer into their experience, who will acculturate to and find reciprocity within a service’s musical ethos; we address these issues through the broad category of taste. Finally, we consider control, which we use to mean all the ways in which users are (and are not) able to direct their musical experience, in terms of how, where, and through what technological means they listen. These four categories are not mutually exclusive, however, and are meant as pathways to critical analysis.
of brand differentiation. Throughout, we suggest ways in which they feed into, inform and compete with one another.

**Interface**

Interfaces are, on the surface, technical meeting points between the user and the service, but they also shape the ‘feel’ of any given service. Given the promises of constant, fluid and mobile access, many streaming services are available across multiple platforms (website, mobile site, stand-alone application, etc.) and devices (computers, smartphones, televisions, etc.). In general, services try to maintain consistency across devices while offering similar (if not identical) features to other services. Through consideration of the interface, we explore the ways these services visually present their options and restrictions to their users, as well as the way design elements emphasize or downplay other elements of the service (such as quality, taste and control).

The Songza interface presents a branded musical experience in which music is annexed to everyday life as the always-appropriate accessory. Songza welcomes its users with a cerulean screen where a ‘Concierge’ notes the day and time (e.g. ‘It’s Tuesday afternoon’) and asks what kind of music might suit a user’s current activity. For example, one might opt for music to ‘boost your energy’ (either with lyrics or without), while others might opt for brand new music. In addition to the ‘Concierge’, users may navigate to playlists via a menu that divides the music along other lines: Activities, Genres, Moods and Decades. While genres offer a straightforward if exhaustive list of possibilities, the other categories for navigation are decidedly more whimsical. ‘Decades’, for instance, includes some decades but also subcategories of decades (such as ‘80s Rock’ or ‘60s International’) as well as the past five years listed individually. The ‘Moods’ category goes further, transcending descriptions such as ‘happy’ or ‘sad’ to include sentiments such as ‘introspective’, ‘motivational’, ‘seductive’ and ‘trashy’. ‘Activities’ similarly showcases an enormous but somewhat idiosyncratic range — from ‘ballroom dancing’ to ‘hanging out in the man cave’ to ‘skateboarding’.

Much more so than Spotify, Rdio or Beats/Apple Music, Songza’s interface calls attention to the narrowness of its offerings, despite claiming to have created over 100,000 playlists (Sisario 2012). Songza’s interface is simple and pared down, lacking the features and breadth common in jukeboxes, Internet radio stations or other contemporary software media players like the iTunes player. The combination of a basic interface and carefully selected, engaging playlists speaks strongly to the company’s core mission (‘building products that are useful, simple and delightful’) as well as a particular type of imagined consumer, who desires good music but is happy to hand the selection process over to an expert (Songza Careers 2014). These design choices also suggest the ways in which Songza’s interface is guiding consumers’ use of the service. The range of activities largely correspond to leisure, particularly that which upwardly mobile, tech-savvy young professionals might undertake, such as coding, shopping, partying and making out. Obviously, these activities are carefree and fun rather than political or serious, but this takes on a different valence when considered alongside the company’s revenue objectives. Notably, in their invitation to advertisers, they explain:

Songza enables advertisers to reach the right users at the right time based on exactly what the user is doing at that moment... Advertisers can leverage the Songza platform to create lifestyle-enhancing experiences for customers that pair the perfect products to the perfect moment. (Songza Advertising 2014)
Thus, Songza lobbies for the increasing integration of music into everyday activities. Moreover, while the interface makes it easy for consumers to tweet songs they are hearing, share them on Facebook, like them, or purchase them, it does not currently spotlight social media interactivity. It is also unclear if interactivity actually impacts what kind of music that user will hear, or not hear, upon future listening. Unlike the other services, which depend heavily on tracking individual user habits and patterns, Songza allows for anonymous listening, suggesting individual data trails are not the service’s only source of value. Instead, the site presents customized curation (by moment, by day, by genre) as an opportunity to provide highly targeted advertising opportunities to its clients.

The option to listen anonymously differs strongly from services that require registration and thereby individualization, such as Beats/Apple Music or Pandora. Spotify and Rdio also assume a more personalized experience, and have a range of integrated recommendation and social features to ensure that happens. Their interfaces draw more from traditional software media players, like iTunes or Windows Media player, and blend a user’s local library with the much larger streaming libraries offered by the service. Unlike Songza’s mood/playlist-focused interfaces, the other services present a consumer’s collection, and a set of recommendations, in ways that resemble traditional musical retailers. That said, all the services want musical choice to feel easy, harmonious with one’s environment and unencumbered. Even more important, they want the music to feel good: exactly what you were looking for, even if you did not know it.

Quality

Beyond the interface level of each service (i.e. specific menu options, design elements, etc.), we also explored how services differentiated themselves based on the attribute of quality, which we define as the specific features the service provides that either differ from other services, or are used rhetorically in press materials as differentiators. In other words, each service has particular features — whether those be social media integration or catalog exclusives or human-curated playlists — that it uses to distinguish itself qualitatively from others. There are clear differences, for example, between Beats'/Apple Music’s promise of high-quality audio files and human-curated selections and Songza’s mood-and-activity-based playlists. However, given that streaming as a mode of consumption is still emerging, each service ultimately takes on a dual role of pushing not only these specific qualities, but also the benefits of streaming music more generally. Further, since the market for streaming services is still in flux, each of the companies we analyzed demonstrated shifts, at least in their ad campaigns and marketing materials, in the particular kind of ‘quality’ they were promising since their initial introduction. While many services initially pushed ‘quality’ related to the amount and availability of content they offered (e.g. all the music you want in one place), services are now moving toward more subtle and distinct interpretations of quality, such as social connections, recommendation and curation capabilities.

Spotify offers the clearest example of this shift. Initially, the company hoped to provide access to ‘95% of all music available on CDs’ (Esmerk 2008) but licensing troubles (Paine 2009) and failure to obtain rights for certain artists, labels and catalogs has meant that different countries and regions have notably different levels of access. Given the impracticalities of living up to their original tagline of ‘gathering all the world’s music in one place’ (Spotify Seals Major ... 2009), the service gradually began emphasizing its
social aspects and its abilities to help users discover new music. By integrating Facebook and letting users follow artists and one another, Spotify positions musical discovery and consumption as social processes; users can see what others in the network are listening to and easily share their own listening habits, privately with friends or more publicly. Spotify now offers what it calls a ‘three-dimensional approach to music discovery’ — the combination of recommendation from friends, proprietary algorithms and real music experts (Want the Right… 2013). Each approach, however, contributes to and relies upon on Spotify’s intense data analytics infrastructure, supported largely by their 2014 acquisition of musical intelligence platform the Echo Nest (Morris 2015). Regardless of how users come to discover a new song, any action (e.g. skipping a song, sharing it, stopping it, etc.) feeds back into individual user profiles and to Spotify’s larger database. Finally, Spotify also features the ability to add ‘apps’ to the player from the likes of Pitchfork, Rolling Stone and The Hype Machine, so users can rely on the editorial expertise of traditional tastemakers and engage in consumption of musical discourse. However, Spotify has recently stopped accepting new apps as it develops some of this functionality natively, and shifts to apps built for mobile platforms.

The ‘quality’ of streaming music services, then, is reflected in the content-level mix of services they offer (i.e. recommendation algorithms, human curation, personalization features, social connections, etc.). While the interface level makes these features visible to users in different ways, the very choice to include or exclude a particular type of discovery or content organization, etc. is what gives a service its particular quality. To judge by Spotify’s marketing materials, choosing among these various capabilities is a matter of individual preference. However, this ignores the role these recommendation features play promotionally. Spotify, for example, seems at first blush like a distribution outlet, but it has recently started to play a more concerted role in trying to break artists. Using the data it collects on artist popularity and user behavior to help guide its decisions, Spotify partners with specific artists and labels to help increase their exposure on the platform (Spotify Reveals… 2013). When artists like G-Eazy, Hozier or Tove Lo are picked as featured artists, their work is advertised prominently throughout the Spotify player in the ‘discover’ tab, on their main landing pages, or featured in ‘exclusive’ Spotify Sessions.

These efforts represent an advanced promotional feedback loop that mixes user activity with interface design. Although traditional retailers have long done in-store promotions for new releases or hosted events to coincide with local concerts, integrating promotional materials directly into the playback interface makes these efforts far more direct and immediate. Due to the lack of transparency in how recommendations and ‘discoveries’ are presented, it is often not clear that these are promotional messages; rather they seem like grassroots discoveries based on a user’s previous listening habits and patterns. The line between Spotify as a distribution outlet and Spotify as a promotional intermediary blurs.

Spotify’s branded musical experience, then, is one that frames users as active agents in the process of musical discovery, even if that process involves delegating curation to the system’s comprehensive data mining and algorithmic recommendation. The quality of a service depends less on how well its recommendations match a user’s expectations (since most recommendations are based on data collected from users), and more on how each service presents their own effectiveness in meeting the user’s musical needs. As they do so, however, these services obscure the active role in promotion they are starting to assume.
Taste

Central to how music streaming companies hope to accrue and retain a user base is through correlating with consumers’ extant musical habits and preferences. This means distinguishing between casual listeners looking for easy access to the latest hits and obsessive geeks wanting to burrow deep into obscure niches. Put differently, services must interweave the newness of these services with norms, demographics and predilections that predate streaming.

Every service must, therefore, consider taste, defined as ‘an acquired disposition to “differentiate” and “appreciate”’ (Bourdieu 1984, 466). There are two planes on which these concerns may manifest. First, as we have already noted, services demonstrate their quality through how they recommend and categorize music; many of these divisions pertain to genre and lifestyle — markers that scholars have long understood as means of identifying taste cultures (Holt 2007; Gans 1999). At the same time, as services consider which slices of an already hyper-fragmented musical marketplace they might be able to secure, they embark upon a process of distinction within the constellation of streaming services, where ‘aesthetic choices belong to the set of ethical choices which constitute a lifestyle’ (Bourdieu 1984, 283). In the same way that consumers may be differentiated (and funneled) by whether they use iPhones or Androids, we are beginning to see services work to attract particular kinds of consumers who then identify as a dedicated user of that service. As we were completing this paper for publication, Apple announced that Beats had been subsumed into its new streaming service, Apple Music. We maintain our focus on Beats here, though, for several reasons. First, that Beats went from a spectacular launch to a node in Apple’s ecosystem in less than 18 months indicates just how unstable the streaming marketplace is — and may prove instructive in thinking about Tidal, whose launch in 2015 seemed straight out of the Beats playbook. Second, that Apple Music will blend users’ iTunes libraries with its streaming services suggests the importance of pre-streaming musical behavior, and the norms of taste and identity located therein. Finally, the Beats names remain attached to the radio service within Apple Music, in effect making Beats the replacement for iTunes radio.

During its lifespan, Beats attempted to attract those willing to pay a premium for higher quality audio and expertly crafted playlists. The service charged $10 per month for a subscription, after a two-week free trial period. However, the focus on sound quality set Beats apart from its competitors and supplied a branded musical experience that trafficked seamlessly between the service and Beats’ well-established line of headphones. Beats’ curatorial efforts likewise upheld this ‘boutique’ experience of music; as CEO Ian Rogers noted in an interview, ‘[w]hat fans want is actually not every song in the world in their pocket; what they want is something awesome to listen to’ (Halperin 2013). Or, as one reporter put it, Beats Music aimed to solve the problem of ‘what song comes next’ (Sisario 2014b; ‘Beats Meets’). The imagined Beats consumer, both discriminating and nostalgic, is thus invited to think of Beats as the digital analog of that great little local record store — the one that wanted to sell the best stuff, rather than everything.

Discrimination was thus visible in every aspect of the Beats experience. A new user was supplied a list of genres, and asked to click twice on ‘loved’ genres and to remove hated genres. A user then was invited to click on three artists she/he likes and press play; a subsequent page acted as a dashboard and showed a range of options, including playlists, albums, best of lists and more. The assumption, then, was that a Beats user arrives having already formulated genre and artist preferences, and sought for the most part to affirm and deepen them.
Beyond the dashboard, a listener could scour the service’s storehouse of playlists, or search for songs, artists or albums; she/he could create a personalized library of music, favorite certain artists or tracks, and follow artists or other users. In these areas, too, Beats seemingly was oriented toward a musical consumer who was knowledgeable or wanted to become more so. For instance, artist pages include an ‘About’ section of biographical information, as well as areas listing ‘Top Songs’, ‘Essentials’ and ‘Latest Release’ information. Playlists include things like ‘Intro to the Rolling Stones’, ‘Influences: Ariana Grande’ and ‘Technical Ecstasy: A Tech-Death Primer’. If someone wanted to read more about a genre such as pop within the service, she/he would find an explanation replete with musical references — Tin Pan Alley, The Cowsills, New Edition, and Justin Timberlake to name just a few. Musical consumption, then, was a considered experience — one that Beats desired to guide and help develop.

This niche strategy was somewhat incongruous, though, with Beats’ other marketing tactics. Their splashy SuperBowl 2014 ad campaign — a partnership with AT&T — featured everywoman Ellen DeGeneres dancing to the music of then-newcomer Aloe Blacc; other celebrity endorsers such as Pharrell and Lady Gaga conferred style and credibility, but are also household names. This speaks to a struggle all streaming services face in balancing several competing goals: to sell streaming as a viable alternative for downloading and musical ownership; to differentiate themselves from other streaming services in a crowded market and to deal with the hurdles presented by licensing, artist compensation and technology. Songza, like Beats, sends mixed messages: it at once beckons its young, discerning user while also becoming more generic, especially upon its acquisition by Google. Spotify and Rdio err in the opposite direction: rather than try and construct a particular identity for their users via a particular mode of curation or discovery, they offer a Swiss army knife style of options for pursuing musical interests.

Control

We conclude with the notion of control, since it permeates all the above attributes. By the term control, we include what users can and cannot do with the music files and music players they are given (which is wrapped up in both the affordances of the interfaces and the quality of the services), what choices users have over how they discover, sort, organize and use their music (which connects to taste), and how these various services all contribute to larger databases that shape the ways users encounter cultural commodities. Control, however, also refers to the ways these various services manage, segment and profit from user behavior. Signing up for a streaming service involves implicit participation in what Mark Andrejevic calls a digital enclosure: a space in which ‘every virtual “move” has the potential to leave a digital trace or record of itself’ (Andrejevic 2007, 2). Like other forms of ubiquitous computing, streaming is as much about ‘an attempt to compel or entice entrance into a monitored space that helps rearrange relations of consumption and production’ as it is about user convenience (Andrejevic 2007, 105). Streaming services, as digital enclosures, apply this control not just through the gathering of data traces, but, increasingly, through the permissions they allow or disallow regarding how, when, where and on which device users can employ, to consume music.

Each streaming service has to delicately balance the inherent tension between the stream as an unlimited and uninterrupted flow and the stream as a way to segment between various levels of consumers. Rdio, for example, has in the past promoted taglines such as ‘Any song, anywhere, anytime’, ‘Music Everywhere’ and ‘Everywhere you Go Rdio Provides the Soundtrack’; they have tried to live up to these claims by providing
access to their service via a web browser, a desktop application and mobile platforms. But the control users have over song selection and user experience depends on how much they have invested in the service. Like Spotify, Rdio offers an ad-supported platform on the web and desktops, where users can pick any song of their choosing. Their mobile application allows users to search for these same songs, but a user must have a paid subscription in order to be able to play individual songs; non-paying mobile customers simply get a ‘station’ built around a particular seed song or artist. Thus, while Rdio markets its service as fully accessible anywhere and everywhere, in reality this freedom is only available to those paying for top-tier access.

Rdio has experimented with multiple business models. They began as a pay-only subscription service with a set fee, gradually introducing different cost tiers depending on which platform users wanted access to (i.e. the web, the web plus mobile, etc.). Eventually, likely due to the popularity of Spotify, they instituted free ad-supported options. But even paying customers are left with different levels of control over their music collections. Rdio, like the other services, only works with a persistent Internet connection. Even with paid accounts, offline access to files is limited to mobile platforms and is not available for desktop computers. Rdio also used to sell individual MP3 files (over and above the monthly subscription fee) that users could transfer to other computers or CDs, though they have recently phased this option out (Rdio Help Center 2015). The Rdio desktop app also offers a feature that can scan a user’s local music library (from, for example, iTunes) and then match those songs to ones on Rdio. But again, the user simply sees these songs in their application — they cannot be managed or altered within Rdio’s interface.

As their business model has changed, their marketing focus has shifted away from promoting the fluidity of the service (‘Any song, anywhere, anytime’, etc.) to its social features (‘Connects people with music’). This shift in the particular ‘quality’ of the service they are highlighting, however, is also used as part of the rationale for placing greater limits on the user’s ability to manage and own their music files. In fact, Rdio’s rationale for not allowing users to download and manage individual files comes directly from its mission to provide a more social experience of the music. As they note in a user forum, ‘local files aren’t social in the way that our user experience calls for’ (Rdio Help Center 2011). If a user’s music collection was previously a private (or a selectively public) affair, Rdio emblemizes how adding social features becomes a tradeoff for control over individual files. Owning music now seems secondary to letting others know a user has listened to music, since it is through this information that Rdio (and Spotify) can produce economic benefits from free services.

We rehearse some of the specifics above not to belabor the functional/interface vagaries of the individual services, but rather to point out the way in which many of these services use the idea of streaming music as the selling point, rather than the music itself. They promote the benefits of music everywhere and then parcel up the delivery of this promise into a series of subscription options, customer niches and restrictions on platform mobility. The supposed fluidity and abundance of the stream is precisely what makes it easier for providers of musical content to control, license and monitor various uses of music, which in part explains the increasingly favorable attitudes toward streaming on the part of record labels (Rogers 2013, 86–89).

**Conclusion: control and the branded musical experience**

As we have demonstrated, streaming services define themselves according to the styles of musical access they offer, deriving from their interface (feel), quality (curatorial
mechanisms), taste (imagined consumer) and the control over music they allow. The combination of these variables, unique to each service, amounts to what we are calling a branded musical experience. More than a simple brand identity, the branded musical experience corresponds to real differences in what a consumer is able to listen to and do within each service. In a marketplace as new, competitive and ill-defined as music streaming, we should not be surprised that there is so much irregularity among the kinds of branded musical experiences available. We are in the early phases of a new mode of musical consumption, for which the rules and norms have yet to be determined. At the same time, our analysis suggests that, because conventions are still stabilizing, the individual streaming services must also tout their benefits in a more general sense — convincing wary, unfamiliar or fickle customers that streaming surpasses other ways of accessing music. Understood in this way, the branded musical experience identifies a larger shift in musical consumption in which consumers do not own nor fully control discrete musical collections but instead buy into cloud-based libraries, accessible via constant connection to the Internet.

The shift toward a branded musical experience encapsulates four notable changes in music's circulation. First is the primacy on quantifying and deploying a listener’s affective relationship to music in the presentation and curation of that music. Whether through the facilitation of ‘liking’ or ‘favoriting’ tracks or more aggressively through mood-based or time-of-day-based playlists and highly personalized recommendation algorithms, streaming services aim to articulate, understand and, in some cases, even shape listener sentiments. Users might balk at the impossibly subjective nature of playlists entitled ‘Unrequited Love’, ‘Life Sucks’ and the three-and-a-half-hour ‘Forever Alone’ playlist (Spotify). They might be especially skeptical when they discover these mood-based playlists frequently re-package the same individual songs/artists that are popular elsewhere on the service (one person’s ‘Life Sucks’ song is another person’s ‘Caffeine Rush’). But these nebulous affective labels are evidence that judging these services based on the quality, accuracy or fit of their recommendations is a red herring. Rather, their emphasis on the affective dimensions of music consumption and discovery are part of establishing the quality and identity of their service. In an ecosystem where many of the services offer the same catalogs of musical content, the affective cues and features for discovering and encountering music become the main point of differentiation.

The push toward presenting music as an affective experience rather than as individual songs relates to a second shift within the branded musical experience: the heightened importance of consumer tastes as well as their behavioral and social data. As with other digital media services, this information not only constructs personalized understandings of individual users (and therefore tailored experiences), but, in aggregate, shapes recommendation algorithms, social features and advertising (Andrejevic 2007; Mosco 1996). In other words, digital streaming services depend on a form of communicative capitalism (Dean 2010) where discourse about music is more valuable to these services than the music itself. The likes, plays, stars and comments provide the trackable, actionable data on music habits which can then be used to generate other kinds of sellable data. The fluid and copiously flowing stream of plays and discourse enables digital music services new means of extracting profit and value from the musical consumption process, especially in an era when much of this consumption occurs through free or ad-supported accounts. While selling music has always involved measuring and understanding audiences, these services embed features that measure users’ affective investments in music, and then deploy the resulting data in service of future recommendation and curation. Thus, not only does this information recursively filter back into an individual user’s experience (so,
for better or worse, a service becomes more individualized), but it is also used to inform artist royalty rates (which are based on individual play counts) and promotion (as in the case of Spotify’s featured artists program).

The blending of promotion and distribution, which achieves new levels of coordination within streaming services, is the third important shift within the branded musical experience. In the same way that ‘natural’ search results have been shown to carry biases (Feuz, Fuller, and Stalder 2011; Segal 2011), recommendations must be considered not as some ‘pure’ or ‘objective’ reflection of individual taste or genre correlations, but instead always potentially refracted through the promotional aims of a particular services. Payola, bullying, minimum advertised pricing deals and other forms of threat and favor have a long history within the business of selling recordings (Dannen 1991; Burkart and McCourt 2006, 32–34), thus making the possibility for manipulation in the current case seem less novel or extreme. That said, recommendation algorithms and the various avenues for discovery within these streaming services carry a veneer of mathematicality, impartiality and/or data-driven certainty (Boyd and Crawford 2012). An awareness of how they too may be shaped by cultural or economic imperatives drives contemporaneous calls to examine the politics of algorithms (Gillespie 2014).

Finally, the shift toward a branded musical experience also infiltrates a user’s local library, in an attempt to offer a seamless experience between music on any given machine and music in the cloud. While this may seem a convenient way to manage a music library or to quickly obtain taste preferences, this practice also speaks to various ways in which even the music we own is becoming less and less ours. The rise of the MP3 was premised on increased user control over media (i.e. to split the CD up and remix it, to rename files and control metadata, etc.). Streaming services offer the illusion of increased control by offering greater access to more music in more places, but the blurring of the local library and the cloud service through the interface belies the lack of control available through these services. It is not a far leap to imagine streaming services managing this relationship even more actively and intrusively, as Apple demonstrated when they distributed U2’s 2014 album, Songs of Innocence, to every user of iTunes — and, with the introduction of Apple Music, they have taken this blending even further.

This latter point raises a number of issues that have implications far beyond the sphere of music. The tethering of an increasing number of our devices to a constant Internet connection makes us increasingly adrift when, for whatever reason, the service or our Internet access ceases to function. We must also ask what relinquishing control over musical collections means when everything we might want is not available. A number of prominent artists have refused to include their music via streaming services; others have included partial catalogs, or pulled their music after using the services briefly. For example, Taylor Swift pulled her entire catalog from Spotify in 2014, citing conflicts over royalty rates. In the process, Spotify users were left without access to the top-selling album of the year.

As much as providers loftily promise a global celestial jukebox, the realities and minutiae of national rights and licensing deals, desirable versus fringe markets and service outages conspire to keep streaming services grounded and highly localized. The control users have over the choice of music they listen to, over the platforms they listen to music on and even over the files themselves is exchanged for a branded musical experience that foregrounds instant, multi-platform accessibility. The stream, despite attempts by providers to position it as ever flowing and always on, is just as often an opportunity to separate, segment and differentiate among different levels of consumers, and different groupings of musical consumption activities. The branded musical experience supplied by streaming services is ultimately about smoothing over streaming’s central paradox: getting users to accept it as their conduit to
music, while also using differentiated and variable access to the stream as the primary means of extracting value from a wide range of musical practices.

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Notes
1. A Lexis-Nexus Search for the term ‘streaming’ found no reference of it in relation to television, movies or radio prior to 1997.
2. An alternative to ‘true’ streaming is progressive streaming, which downloads a copy of the file in small chunks and plays it from the user’s hard drive. Services that utilize different streaming technologies are, in essence, selling differently useable products (Anderson, 2011).
3. Pandora and Youtube were also considered as cases for this paper. While YouTube functions as a streaming service, and is a popular resource for musical discovery, we have chosen to focus on music-only services and one that privilege features for musical curation, playback and circulation. The choice to exclude Pandora was slightly more difficult, given its established presence in the streaming services market. However, given that we already had Spotify and Rdio to illustrate more entrenched services, we chose to focus on Songza and Beats to discover how two relatively upstart services markets themselves (two established, two emerging). And while we realize all of these services are in a fragile market that is in a near-constant state of flux, we feel the cases still provide useful evidence for how streaming services get established, how they envision users and how they tweak their offerings as a result.

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