Artist to
Business to Business
to Consumer
Audio Branding System

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D2.3 Music Providers Landscape Europe

Project Reference	688122 — ABC_DJ — H2020-ICT-2015
Deliverable/WP/Task	D2.3/WP2/T2.3
Delivery Date	30/06/2016
Main Author(s)	Borja Torres, LMONK, borja@lovemonk.net
Co-Author(s)	Dave Roozendaal, LMONK, davero@lovemonk.net Lucía Reguera, LMONK, lucia@lovemonk.tv
Quality Assurance	Alessandro Canepa, PIAC, alessandro.canepa@piacenza173.it Silke Borgstedt, INTEG, silke.borgstedt@sinus-institut.de
Filename	D2.3_ABC_DJ_Music_Providers_Landscape_Europe.pdf
Publication Level	PU

ABC_DJ - An Artist-to-Business-to-Business-to-Consumer Audio Branding System

contact: www.abcdj.eu

email: info@abcdj.eu

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Project Information	Full project title ABC_DJ — Artist-to-Business-to-Business-to-Consumer Audio Branding System
	Project Coordinator Stefan Weinzierl / TU Berlin
	Project ID 688122 — ABC DJ — H2020-ICT-2015
Acknowledgements	This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 688122.

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History

Version	Name	Date	Remark
V1.0	Borja Torres	2016-06-21	First draft
V1.2	Borja Torres	2016-06-24	First draft revised by INTEGRAL
V.2.0	Borja Torres	2016-06-27	Second draft including second part
v. 5.0	Borja Torres	2016-06-29	Formatted

Glossary

Acronym/Abbreviation	Full Name/Description
ABC_DJ	Artist-to-Business-to-Business-to-Consumer audio branding system
CC	Creative Commons
MRO	Master Record Owner
IFPI	International Federation of the Phonographic Industry

Executive Summary

This text gives a comprehensive overview of the landscape of European music creators and their respective multipliers in an audio branding and in-store music context. This includes an investigation of music management procedures as well as audio file formats and qualities in use.

1. Introduction

"Music is the divine way to tell beautiful, poetic things to the heart."
— Pau Casals

The aim of this deliverable is to give an overall view of the many different options people, who take care of music for brands and companies, have in order to source music.

However, we think that, because we will be talking about the different right holders, it's a good idea to start with an introduction to the legal aspects of any given song.

When you hear a song played on the radio at your local hairdresser's, while buying groceries at the supermarket, or at a small bar on the beach whilst sipping from an organic ice-cold lemonade, there are a lot of things going on, from a legal point of view. Of all copyright-protected works, music is legally one of the most complex and intricate.

1.1   A Brief Introduction to Copyright
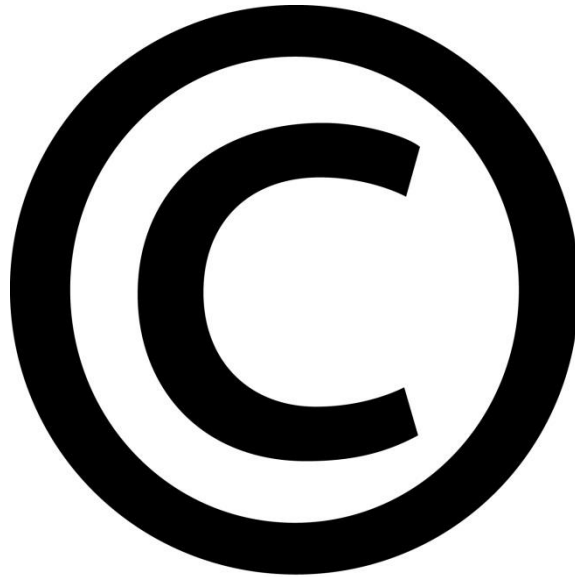
1.1.1 Origins

We can situate the first origins of copyright in 18th century England, and some time later in France.

In England, the key moment was the enforcement of the Statute of Anne in 1710, which to the majority of experts in the field constitutes the genesis of copyright.

The law in question was established after several conflicts between a group of authors and the powerful guild of printers, the Worshipful Company of Stationers, better known as the Stationers' Company. The enforcement of the Statute of Anne had some important consequences:

- From then on, the author's express permission was needed to print their work;
- It put a time limit on literary ownership, and thus established the public domain;
- It put an end to the Stationers' Company's publishing monopoly. While before, anyone who wished to publish a work needed their permission to do so. It also ended the Stationers' Company's practice of censorship of some works.

In pre-revolution France, at the time a country in turmoil, there was a similar course of events, although in this case it was the playwrights who took the initiative to stand up against the printers guild and the publishing privileges.

They were exciting events that took place in the middle of the modernization process of the media. It created new situations politicians, guilds and authors had to deal with in the context of a time of great changes, new liberties, and a growing commercialization of culture. Interestingly, we could say that we are living a similar situation today with the

media reinventing their business models, due to the ever-growing dominance of the internet as the main communication channel.

1.2   Copyright Basics

Copyright is a legal term used to describe the rights that creators have over their literary and artistic works. Works commonly protected by copyright throughout the world include: literary works, computer programs, films, musical compositions, choreographies, artistic works, architecture, advertisements, maps, and technical drawings.

In practice, copyright is the exclusive legal right to reproduce, duplicate, publish, sell or distribute a book, a musical recording, etc., for a certain period of time.

Copyright is a form of intellectual property, along with trademarks and patents in all countries, and other creations (such as trade secrets, unique database rights, rights of publicity and the like), which may vary from country to country.

Intellectual property protects works and other subject matter, like artistic performances, phonograms, broadcasts, or audio-visual recordings and software.

Related or neighbouring rights protect that other subject matter as a separate set of copyright-type rights, given to certain people or bodies that help make works available to the public. In the music context, the beneficiaries of related rights in national legislations are usually performers, producers of phonograms or audiovisual recordings, and broadcastings organizations. The term can also refer to rights given to people or bodies, who produce subject matter which, while not qualifying as works under the copyright systems of some countries, contain sufficient creativity or technical and organizational skill to justify recognition via a right similar to copyright. For example, imagine a certain song with a charming children's choir singing in the background: the choir is not considered an artist or a featured artist, so they are not entitled to own a share of the copyright. However, as performers, they have the right to get a share of the money the song may generate when played in public.

The dominant role of the Anglo-American entertainment industry makes copyright the international standard, much in the same way non-Anglo-American bands all over the world are writing and singing English lyrics, but that's a whole other story. However, in Europe it is very common to talk about "author's rights". While copyright has a more economic vision and is more focused on the work itself, the author's rights are more author-centric, and focus on the author as a person. Also, the author's rights insist on the existence of a moral right of the author over his work.

1.3   Creative Commons

Creative Commons is becoming a great option for those who find the All Rights Reserved Copyright statement too rigid.

The Audio Commons Initiative is looking into the possibilities of the professional creative

industries making more use of creative works available under Creative Commons licenses, or that are entering the public domain upon the expiration of their traditional copyright licenses. While at the time of writing this article, the initiative is in a very early stage, we believe it is a project very much worth following: audiocommons.org.
"Creative Commons is a non-profit organization that enables the sharing and use of creativity and knowledge through free legal tools." www.creativecommons.org

Creative Commons was founded in 2001 by Lawrence Lessig in California. Since then, it has become a great alternative to creators who find copyrighting their work too strict.

Creative Commons licenses are free and easy-to-use copyright licenses to give the public permission to share and use the creator's work — on conditions of the creator's choice. CC provides a set of copyright licenses and tools that finds new options, ranging from the most restrictive to the public domain. It allows creators to fine-tune the way they want their work to be shared or protected. It is not an alternative to copyright but it works alongside it– it is an extension of it that helps to fine-tune the rights that a creator is willing to grant to third parties.

There are different Creative Commons licenses, which each creator is free to use as they see fit. We'll give you a short explanation of each license, taken from the Creative Commons website (where you can find a walk-through of the workings of each):

- Attribution (CC BY)
This license lets others distribute, remix, tweak, and build upon a work, even commercially, as long as the creator is credited for the original creation.

- Attribution-ShareAlike (CC BY-SA)
This license lets others remix, tweak, and build upon a work even for commercial purposes, as long as the creator is credited, and the new creations are licensed under the identical terms. This license is often compared to "copyleft" free and open source software licenses. All new works based on the original will carry the same license, so any derivatives will also allow commercial use.

- Attribution-NoDerivs (CC BY-ND)
This license allows for redistribution, commercial and non-commercial, as long as it is passed along unchanged and in whole, with credit to the original creator.

- Attribution-NonCommercial (CC BY-NC)
This license lets others remix, tweak, and build upon a work non-commercially, and although the new works must also acknowledge the original creator and be non-commercial, the users don't have to license their derivative works on the same terms.

- Attribution-NonCommercial-ShareAlike (CC BY-NC-SA)
This license lets others remix, tweak, and build upon a work non-commercially, as long as the original creator is credited and the new creations are licensed under the identical terms.

- Attribution-NonCommercial-NoDerivs (CC BY-NC-ND)
This license is the most restrictive of the six main licenses, only allowing others to download works and share them with others as long as the creator is credited. The original work may not be changed in any way, nor can they be used commercially.

2. Music from a Legal Point of View: A Brief Introduction

Let's go back to that song you are listening to while you are sipping your lemonade. This song, like any other one, has a long list of people who, in one way or another, are legally linked with the song.

Every time a song is played on the radio, your favourite streaming platform, on TV or in the best lemonade stand in town, chances are that it will generate some amount of revenue, which should be properly distributed between the interested parties.
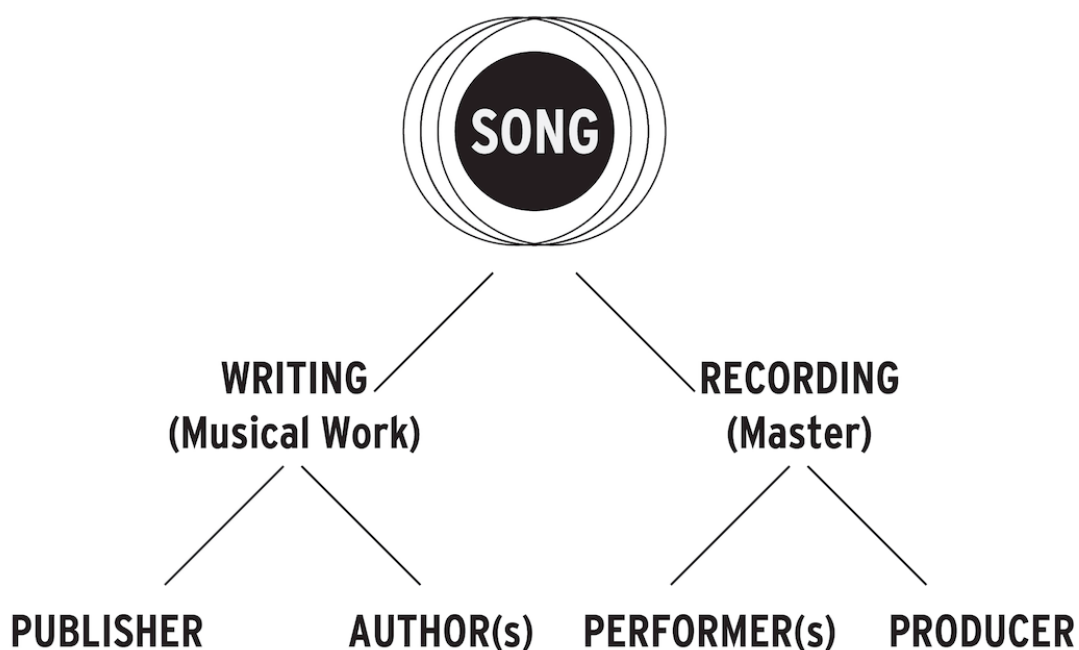
Every song can be divided in at least two different and separate parts: the writing or composition of the song, and the sound recording.

A musical composition, also known as a musical work, is an original piece of music written and composed by one or several authors. If you need to visualize it, you could think of it as a musical sheet. While this may not be accurate from an attorney's point of view, it may help you to envision the idea of a musical composition.

A musical recording, on the other hand, is the result of the fixation of the performance of an artist on a phono record, for example a good old vinyl, a CD, a DVD, or an MP3. It is also called the master or the sound recording.

All My Loving is a wonderful song written and composed by The Beatles. Los Manolos, a Spanish rumba band from the 90s, recorded a rhumba style cover version of the song to celebrate the Barcelona 92 Olympic Games.

Well, as different as it may sound from the original Beatles version, the song is still the same from a musical composition standpoint. Obviously, both musical recordings are different, and they have different right holders, but the copyright of the musical work is the same for both recordings.

2.1   Authors, Writers, Composers

From the musical composition standpoint, the main players are the authors of the musical works.

Depending on each country's legislation, and on how the song is registered, the lyrics are protected separately by copyright as a literary work, or are an indivisible part of the song. So if the drummer of a certain band wrote the lyrics, and the harpist wrote the music, the drummer may be the sole author of a copyrighted literary work or not, depending on the country where they originally registered the song.

2.1.1 Collective Rights Management Organizations

The authors are quite often members of a collective rights management organization, such as collection societies. These organizations act on behalf of their members and issue licenses to users, authorizing the use of their musical works by, for example, radio and tv stations, internet players such as YouTube, etc. They also negotiate the royalty rates and other license terms, and collect royalty payments on behalf of their members. Royalties are distributed according to the usage between the members who, as individual right owners, are not directly involved in the negotiation of the license. Another kind of member of these organizations are the publishers.

2.1.2 Music Publishers

"The music publishers are like the booking agent of the musical works, they take care of things and get a percentage of every euro you make." This definition is heard quite often in rehearsal spaces around the globe. While not a very accurate one, it's quite telling.

When a songwriter assigns a song to a music publisher, the publisher will from then on be in charge of several things. There are a lot of administrative tasks to be done, and the publisher is the one handling the paperwork: collecting royalties, accounting, issuing licenses, claiming undistributed royalties, dealing with other authors who may share a percentage of a song, and many other tasks that may not be among songwriters' favourite tasks.

Besides the administrative tasks, the most important function is to promote songs to possible users and get usages so the songs generate revenue. Some examples: placing a song in a TV show, a film, a video game, an online video, or a commercial for a big brand, or on the next album of a well-known artist who also records songs written by others. All these different kinds of usages can generate extra revenue from the song, and will also require a

lot of paperwork.

Of course, songs could also be handled directly by the songwriters through the Authors' Organization they may be part of. There are different tools to make this easier, but depending on the size of an author's catalogue and the contacts they may have, having some extra help from the outside could be a good idea.

2.2.   Artists, Acts, Bands, Performers, Orchestras and other People Singing and/or Playing Instruments

From the sound recording or master standpoint, the main players are the performers of the recorded songs.

When we talk about the performers, it's not just the main artist or featured artist, but also the rest of the musicians, or not featured artists, who, with their work and talent, contribute to the recording. That extra bit of magic added to your favourite singer-songwriter by the guest trumpet player is not only important on a melodic level, it also involves a link with the song, and entitles the player to some rights. Additional players who are not a part of the core of the artist, orchestras, choirs, even producers, they are all a part of the construction of the song, also from a legal standpoint. And like the writers and composers, they can also be part of collective rights management organizations.

2.2.1 More Collective Rights Management Organizations

Artists are quite often members of a collective rights management organization, such as collection societies. These organizations act on behalf of their members, and issue licenses to users, authorizing the use of their musical works by, for example, radio and TV-stations, Internet players such as YouTube, etc.

Yes, it's quite similar to the writers' and composers' organizations, but the difference is that they take care of the recordings, not musical compositions.

They also negotiate the royalty rates and other license terms, and collect royalty payments on behalf of their members. Royalties are distributed according to the usage between the members who, as individual right owners, are not directly involved in the negotiation of the license. Sometimes these organizations also represent the master right owners, also known as producers.

2.2.2 Artists are not always the Master Right Owners

The vast majority of the well-known music recordings of the past century are not owned by the artists – the biggest piece of that musical cake is owned by the record labels.

The record labels make deals with artists and produce their albums, owning the copyright of the sound recordings. This has been the most recurrent model in the music industry since

its origins, just a few years after Edison pioneered the sound recordings with the invention of the Phonograph in 1877.

Of course there have been exceptions where the artist were owners of their recordings before, sometimes even creating their own companies to be able to sell them, but it wasn't until the 1990s when the idea of the artist owning their masters and licensing them to a record company began to be possible. The record company would be able to sell and market the recordings under a certain agreement and for a limited time.

With the arrival of the internet in the form of MySpace, Napster, and, at a later stage, broadband connections, everything changed, and now it is quite common for artists to own their masters and to decide how to make them available to the public. Sometimes they license their works to record labels, and sometimes they simply make them available to their audience by themselves.

In any case, record labels still own the vast majority of recorded music, and among the record labels there are three companies that are referred to as "major labels", representing more than three quarters of the music market, or even more, depending on the year: Sony BMG, Universal Music Group and Warner Music Group.

The recording owners or producers are responsible for the distribution of their music using the many different options that are available out there. That is the subject of the pages to follow.

3.   Sourcing Music for In-Store and Audio-Branding Environments.

Master recording owners (MROs) have a wide variety of services and platforms at their disposal when it comes to bringing their content to the public, and more particularly to the music decision makers in the context of audio branding and in-store music.

The music market has been one of the fastest to adapt to the new technologies and change their business model. From the rise of Napster in 1999 until now, the business model of record labels, music distributors and artists has changed dramatically, and has paved the way for other cultural industries. It has definitely not been an easy ride, and the future is not completely clear, but, with the possible exception of video games, music is the cultural industry that has best adapted to the digital environment.
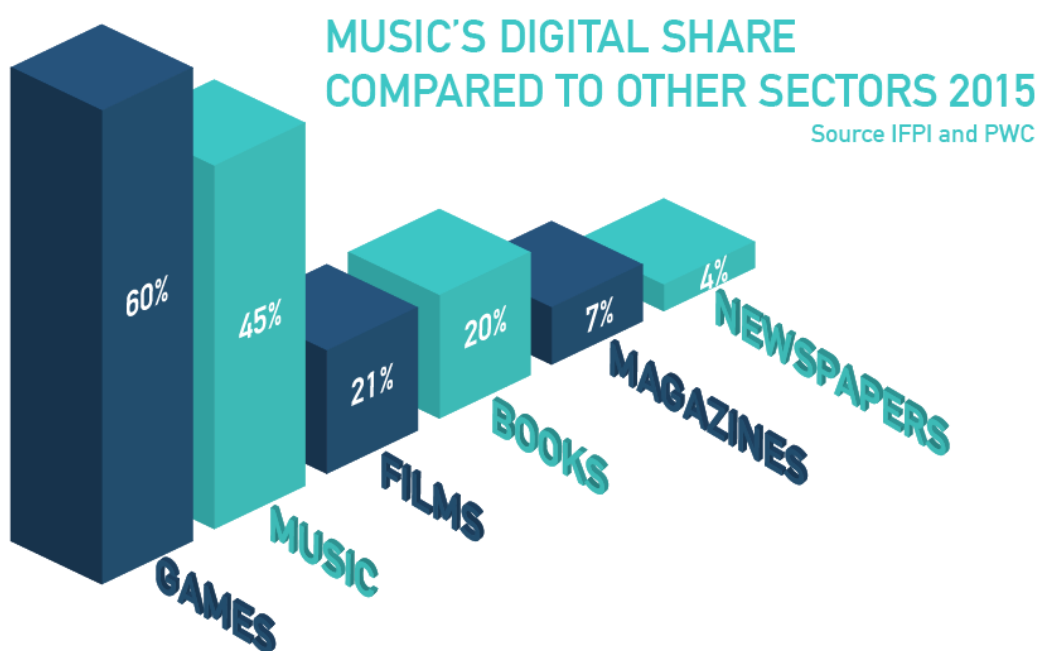
Ever since the late 19th century emergence of Edison's Phonograph Cylinders, the music industry has gone through several formats, with vinyl enjoying a long streak at the top, between the late 40s and the early 80s, when the CD arrived – the general public's medium of choice, until it was recently shoved aside by online consumption. In recent years there has been a lot of talk about the re-emergence of vinyl, sales of which reached their highest level since 1988 in 2015, but, though surprising, in terms of market penetration it is a relatively minor phenomenon.

Music distribution has had to adapt to the new needs of a market that has been changing ever so rapidly, after the emergence of internet, the spread of broadband connections at

music consumers' homes and workplaces, and the incessantly growing popularity of smartphones.

In the golden age of the music industry, business was based on physical format sales and distribution – vinyl, CD, cassette tapes, video tapes, and DVDs. Music distribution companies had to keep a close relationship with the MROs, understand and often store their product, have a solid commercial network, and have a trustworthy and costly logistic setup that allowed them to deliver the records to the warehouses of their clients, big and small stores. Naturally, this changed with the spread of music being digitally distributed online, and even though, thanks to the aforementioned re-emergence of vinyl and still existing demand for CDs and DVDs, physical distribution still exists, digital distribution is good for 45% of the music market's revenues in 2016, against physical sales' 39%.

GLOBAL REVENUES BY SEGMENT 2015 (US$ BILLIONS)
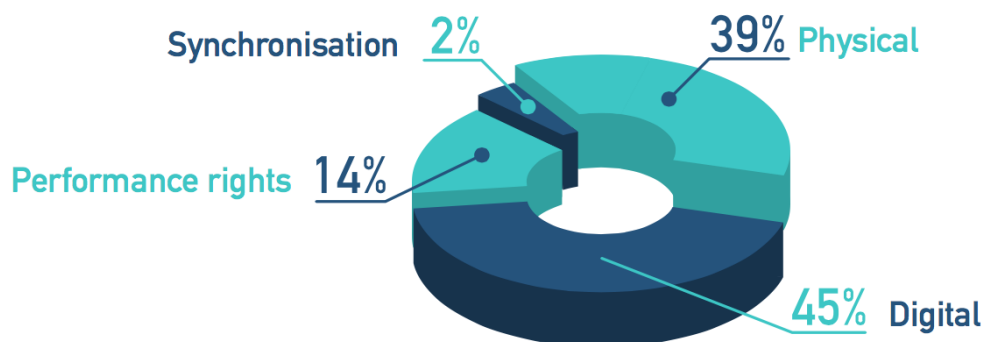
3.1   Digital Music Distribution Services

With the decrease in sales after the spread of peer-to-peer file exchanges, at the start of this century, came a new business model, which included a very pronounced digital component. The adaptation to the digital environment resulted in, among other things, the fragmentation of revenues, which in its turn made for a heavier administrative workload, in an environment in which resources were already becoming scarcer due to the decrease in income generated in the music industry.

But it's not just about the administrative workload coming from having to negotiate, license, invoice and receive statements from the hundreds of available platforms. Apart from the above, digital music distribution services take care of the different audio formats, the compatibility and homogeneity of the metadata, and all the other technical complexities related to logistics and digital delivery. In section 3.4 we will discuss the common formats, metadata and the lack of standardization.

All this has greatly increased the importance of digital music distribution services, in two ways: on one hand, the MROs now have a way to bring their music to the biggest possible audience, and on the other, digital music outlets can now centralize and homogenize the acquisition of musical content.

The MROs' use of these services varies depending on several factors, with the main one being the size. In this case, size refers to the number of recordings they manage, but also to the importance thereof, in the sense of the popularity and/or economic volume.

Digital music distribution services deliver music to the hundreds of retailers, mobile apps and streaming services. They also make sure that content, uploaded by users without permission to platforms that allow user-generated content, generates revenue (described with the term "monetization"), provided that those platforms have a valid license for which they pay the MROs. An example is YouTube, which has signed agreements (and is therefore paying) in some countries, yet hasn't in some others, like for example, Germany.

There are more services for MROs, the most obvious one being content-positioning on the different platforms: the distributor tries to have a platform highlight the music they offer, for example, or to have the music included on high-rotation playlists. However, in recent times, the aggregators, as they're often called, have broadened the range of services on offer. This can include synchronization services, management and collection of neighboring rights, which is done mainly by working with performance rights organizations that take care of the rights of MROs, artists and/or performers, and even the collection of publishing rights.

The distributors make money either by charging a flat fee for each distributed element, song, album or EP, or by charging a percentage of the MRO's revenue, while a combination of the two is also possible.

We can discern two types of companies: On one hand there are those who cater to independent labels and artists with a certain degree of recognition, and therefore, revenue. They will treat the MROs signing with them with more detailed and personalized care, because they expect to have a bigger return, which makes the extra work worth their while. There are some retailers who filter all of their content and who, apart from preferring the content to be delivered by a platform they usually work with, have a team of in-house editors, who listen to, categorize and, ultimately, sanction or reject the music. This kind of distributor will lobby to get the music on those platforms if they feel it is good for the MRO in question.

On the other hand, there are the distributors who cater to MROs, regardless of their size, revenue volume or style. These companies deliver the music to platforms that don't filter their content, and bring the content to their clients in a way we could almost call DIY. The distributors don't deliver to certain outlets which cater to a niche audience, but they do offer an easy service to MROs, who are sometimes not very professionalized.

Apart from these two categories, there are of course the big record companies, major labels and other big independent entities, which own large distribution infrastructures and work exclusively with their own catalogue, even offering their services to third parties.

And there is yet another, and certainly unique, model, MERLIN. It is not exactly a distributor, as digital delivery is not one of its activities, but it is a very interesting case.

"Merlin is the global digital rights agency for the world's independent label sector. Merlin is owned and controlled by a not-for-profit foundation, supervised by a member-elected board representing the wider independent label community. Acting collectively on behalf of more than 700 members, Merlin allows independent labels effective access to new and emerging digital revenue streams. Merlin licenses digital music services seeking to offer their users the widest possible range of independent music from around the globe. Merlin offers the opportunity to globally license – via a single deal – the world's most important and commercially successful independent music labels. Once operating costs are covered, all benefits accrued from our commercial agreements are shared equitably amongst our members. Every Merlin member is provided with full details of each license we sign – informing and empowering their business decisions in the digital marketplace."
www.merlinnetwork.org

3.1.1 Digital Music Distributors and Provided Services

| DISTRIBUTOR	SERVICES	DISTRIBUTOR	SERVICES
A.D.A / WARNER (US)	· customized label services by release and territory · global sales, distribution and retail marketing · radio promotion, publicity and marketing services · synch licensing	CDBABY (US)	· digital music distribution · physical music distribution · UPC and ISRC generation · songwriter affiliation · song registration · royalties collection · unclaimed performance and mechanical royalties collection · synch licensing and publishing rights collection · YouTube monetization · audio mastering · disc manufacturing
BELIEVE (FR)	· complete label services · digital music and video distribution · digital retail marketing and promotion services · synch licensing and neighboring rights management · YouTube monetization	DISTROKID (US)	· digital music distribution · UPC and ISRC generation · royalties collection · YouTube monetization
FUGA (NL)	· complete label services · digital music and video distribution · digital retail marketing and promotion services · YouTube monetization	EMUBANDS (UK)	· digital music distribution · UPC and ISRC generation · royalties collection · YouTube monetization · audio mastering · charts registrations UK, US, Canada, Ireland
INGROOVES (US)	· complete label services · digital music and video distribution · digital retail marketing and promotion services · synch licensing and neighboring rights management · music publishing · YouTube monetization	LOUDR (US)	· digital music distribution · UPC and ISRC generation · YouTube monetization
KONTOR MEDIA (DE)	· complete label services · digital music and video distribution · digital retail marketing and promotion services · mechanical rights management · YouTube monetization	MONDOTUNES (US)	· digital music and video distribution (using the Ingrooves/Universal Music Group distribution network) · UPC and ISRC generation · royalties collection · YouTube monetization · audio mastering · label registration · marketing and promotion
THE ORCHARD (US)	· complete label services · digital music and video distribution · digital retail marketing and promotion services · synch licensing and mechanical, neighboring rights management · YouTube monetization	REVERBNATION (US)	· digital music distribution (using the Ingrooves/Universal Music Group distribution network) · UPC and ISRC generation · YouTube monetization · artist development programs · synch licensing · personalised marketing and development strategies
ZEBRALUTION (DE)	· complete label services · digital music and video distribution · digital retail marketing and promotion services · YouTube monetization	SYMPHONIC (US)	· digital music distribution · UPC and ISRC generation · royalties collection · marketing and promotion · synch licensing · neighboring rights collection · YouTube monetization · audio mastering · CD and vinyl pressing
		TUNECORE (US)	· digital music distribution · UPC and ISRC generation · song registration · royalties collection · YouTube monetization · audio mastering · CD duplication

3.2   Download Services

Online digital stores offer the possibility to buy and therefore own music. The market leader is, without a doubt, iTunes, the service offered by Apple, reaching peak revenues of $3.9 billion in 2012. This figure has been going down since then, and in May 2016 there was even talk of the service being cancelled within the next two years. However, for now, it's still in place, firmly positioned at the top.

Other important stores, albeit at a considerable distance when it comes to market shares are Amazon MP3, Google Play, 7Digital, and, for dance music, Beatport and Junodownload.

As a download service, Bandcamp is also rather interesting. It's not exactly a store, but it offers MROs the possibility to customize their own download store, including a streaming service and the option to sell physical formats. Originally aimed at single artists, since 2014 Bandcamp has been catering to labels as well.

In the realm of CC and free music, the most important download and streaming platform is Jamendo, a community that enables musicians to upload their music for users to download for free.
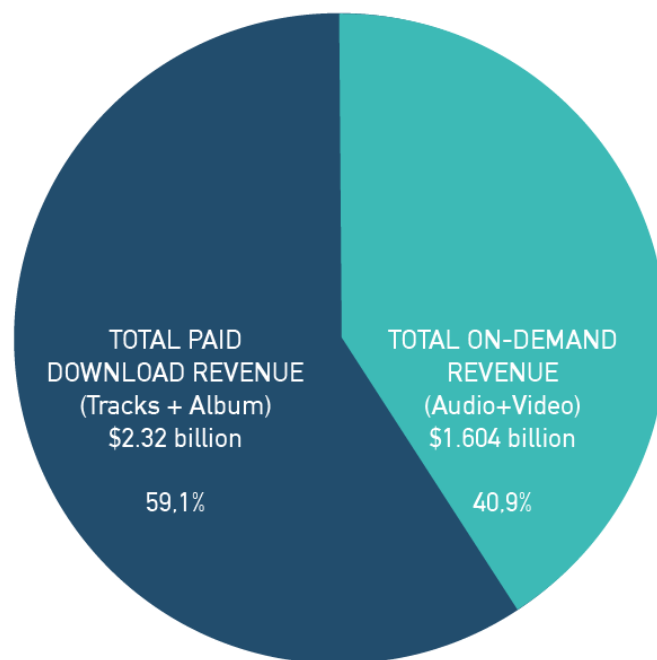
According to Nielsen's data for the RIAA, US download sales are good for 59.1% of music's digital share. However, this number is declining fast, in favour of streaming revenues.

3.3   Streaming Services

Streaming music means listening to it in "real time", as opposed to downloading a file to your computer or mobile device and opening it, once downloaded and stored. The streaming music services deliver the music encrypted, which makes it impossible to save the files permanently. When a streaming delivery method is used there is no need to download a

complete audio file in order to listen to it on a computer or mobile device. The audio file is delivered in small packets of data, which then is buffered on the device and played virtually straight away.

Streaming services have gained popularity to the point that, today, the music industry regards them as the undeniable future of digital music. It looks like, in the ownership vs access dilemma, users are choosing the latter.

**STREAMING GROWTH
YEAR ON YEAR 2011-2015**

3000
2000
1000
US$ millions

45.2%
37.5%
40.9%
56.0%
46.7%
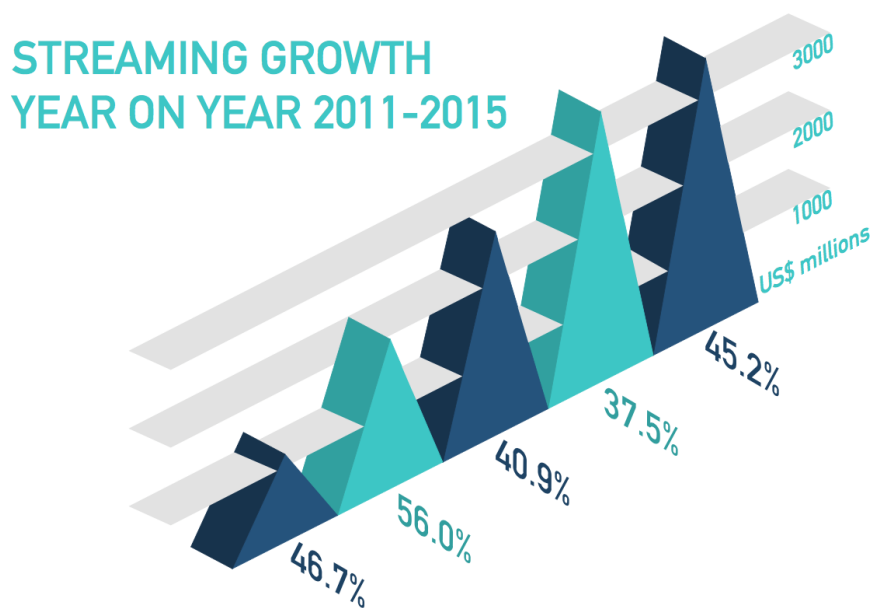
3.3.1 Non-On-Demand Streaming Services

Services that are not on demand don't allow the user to choose which songs they want to listen to at any given point. They could be compared to an online radio service, although most of these services offer personalized channels (often called "radio") based on the user's musical taste.

Among the most popular of these platforms is Pandora, market leader by number of users, yet only available in the US, Australia and New Zealand. Pandora is apparently getting ready to start offering on demand services. Other popular services are 8 tracks and Mixcloud, both specialized in DJ sets, playlists and mixes. Mixcloud has had to modify the service they were initially offering in order for it not to be considered on demand, which allows the platform to use a less costly license structure.

These platforms are of virtually no relevance to the key decision makers in the audio branding and background music realm, as they do not allow users to select and actively discover music. However, they are important to MROs, since they allow them to reach a

considerable audience.

3.3.2 On-Demand Streaming Services

On demand streaming implies that the user can choose which songs to listen to at any given moment. Among the most popular platforms are Spotify, Deezer, Apple Music, Tidal, Soundcloud, and YouTube.

Most of them also offer the possibility of personalized radio in the form of pre-manufactured playlists, based on the user's preferences or previously chosen songs or artists.

Services like Spotify, Deezer or Google Play offer a premium service and a free, ad-supported tier. Others, like Apple Music, Qobuz or Tidal, only offer paid options.

Meanwhile, Soundcloud is an online audio distribution platform that enables its users to upload and share their sounds. Soundcloud users can upload, stream and offer to download their music. The company claims to have 150+ M users. The platform has launched a music streaming subscription service Soundcloud Go in March 2016, currently only available in the US.

Bandcamp also offers the option of on demand streaming, although its main focus is other. Furthermore, the platform doesn't ingest the music through aggregators – it's the user's responsibility to upload their own music. On May 2016, Bandcamp sent a letter to it users, expressing its philosophy:

"Subscription-based music streaming* has yet to prove itself to be a viable model, even after hundreds of millions of investment dollars raised and spent [...] and as long as there are fans who want to own, not rent, their music, that is a service we will continue to provide, and that is a model whose benefits we will continue to champion.*... please consider joining us in never using 'streaming' as shorthand for 'subscription-based music.' The former is an inevitable technological shift, the latter is an unproven business model."

Another service worth mentioning is Pulselocker, a music streaming subscription platform aimed at DJs. Widely described as "Spotify for DJs", it allows users to stream music from the platform using some of the most popular digital DJ software and hardware. It also allows offline use for those who subscribe to the upper tier, and the content is licensed to be used in public performance.

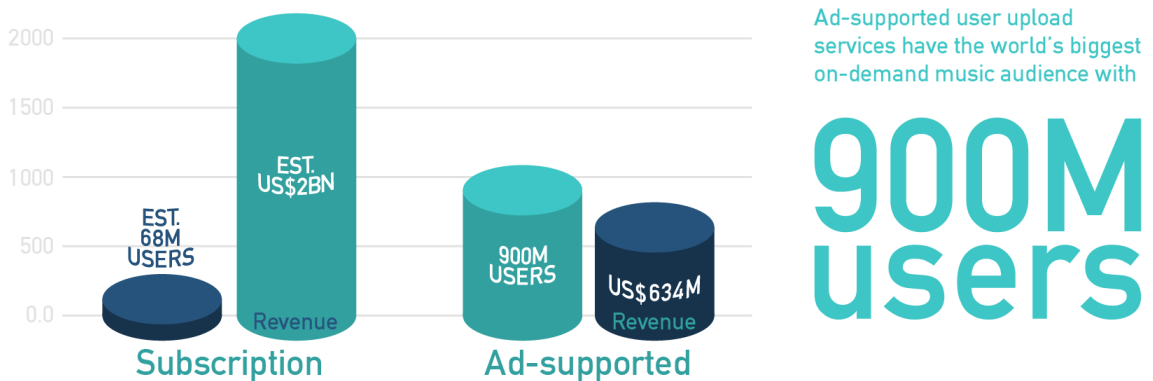Yet another special case, different from all the others, is YouTube. The platform has over one billion active monthly users, but at the same time it is the most controversial player in the music industry. YouTube works as an on demand, ad-supported music streaming service, but the revenue it generates for MROs is generally considered very low, especially keeping in mind that it is, by far, the most popular platform.

PAID SUBSCRIBERS TO SUBSCRIPTION SERVICES (MILLIONS)

68 — 2015
41 — 2014
28 — 2013
20 — 2012
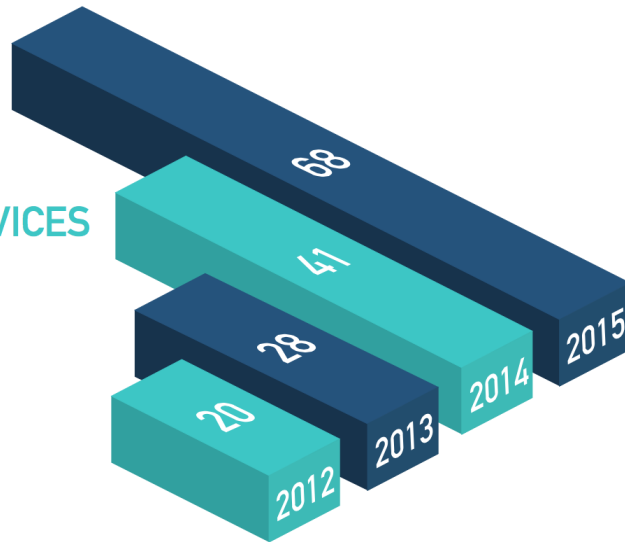
According to the RIAA, In 2015 the US vinyl sales, accounting for just 9% of physical music revenues, brought in more money than the recording industry made on the free tier of services like YouTube, Spotify and others. In a statement, RIAA chairman and CEO Cary Sherman cited the numbers as *"proof that some fundamental market distortions are at play."* Sherman added that *"some technology giants have been enriching themselves at the expense of the people who actually create the music."*

SUBSCRIPTION AND AD-SUPPORTED REVENUES VERSUS USERS (2015)

Ad-supported user upload services have the world's biggest on-demand music audience with

900M users

EST. 68M USERS — EST. US$2BN — Revenue — **Subscription**

900M USERS — US$634M — Revenue — **Ad-supported**

In the IFPI's Global Market Overview: *"Music is being consumed at record levels across the world yet this surging volume of consumption is not returning a fair remuneration to artists and producers. This is the result of a market distortion known as the 'value gap'.*
At the heart of the value gap is the misapplication of legislative 'safe harbour' rules that allow some services, including user upload services such as YouTube, effectively to circumvent the normal rules of music licensing and use copyrighted music content to build their business without fairly remunerating rights holders. As a result, payments to artists and producers are minuscule compared to the massive consumption on these services. The problem also has a serious impact on subscription services such as Spotify, which are forced to compete in a distorted market that limits their ability to attract users to premium services.

The effect of the value gap is reflected in the dramatic mismatch between the volume of music streamed globally and the rewards that this is generating for rights holders. User upload digital platforms comprise a vast audience for music, with an estimated user base of more than 900 million. Yet this huge volume of consumption generates only a very small portion of industry revenues; it is part of an advertising-supported revenues sector worth just US $634 million, accounting for only four per cent of global music revenues. The market distorting value gap must be resolved if music is to thrive in the long term."

3.4   Other Digital Music Services

There are many other platforms that could be interesting tools for MROs. Services like Fatdrop, Inflyte, Labelworx, Reverbnation, and Sonicbids are meant to bring music to professional users. Some, like Reverbnation and Sonicbids, focus more on live performers, although they do offer several different functionalities, including, in the case of Reverbnation, digital distribution. Others, like Shazam and Playmoss, are platforms offering different services. Shazam, for example, enables users to identify songs on the spot through its mobile application, gives them relevant information about the artist in question (videos, lyrics, concert tickets, recommended tracks) and offers the possibility to buy them through one of their partners' services.

3.5   Audio File Formats and Digital Music Delivery

An audio file format is a multimedia container that holds an audio recording.

3.5.1 Compressed and Uncompressed Formats

There are different formats, depending on the audio compression: uncompressed audio formats such as WAV, AIFF, or AU; formats with lossless compression, such as FLAC, MPEG-4 SLS, MPEG-4 ALS, MPEG-4 DST, WavPack, Shorten, TTA, ATRAC, Apple Lossless, and WMALossless; and formats with lossy compression (meaning there is a certain level of audio quality loss), such as MP3, Vorbis, AAC, and WMA.

While an uncompressed format file can be reproduced directly, a file with lossless compression needs some processing before it can be played. This format is more efficient when it comes to the space it occupies on a hard drive. These files provide an approximate compression rate of 2:1. The most widely used of these formats is FLAC.

In files with lossy compression, data is compressed while discarding part of the information. The process attempts to minimize the amount of data the file holds, reducing its weight, but also its audio quality. The compression rate varies between 4:1 and 8:1, with the audio quality decreasing considerably with higher rates.

The most commonly used lossy compressed file format by far is MP3. This format was one of the first to appear, and, according to several comparing studies, has since been surpassed in terms of quality by other formats. Nevertheless, it's the most widespread among music players.

Another highly popular compressed format is AAC, a proprietary format by Apple, widely

used thanks to the ubiquity of iPhones and iPods, while several different studies show its sound quality is higher with regards to similar compression ratios to the MP3 format. Nevertheless, since AAC is a proprietary format, its use outside of the Apple environment is much lower than the MP3.

In the realm of of audio branding and background music, the ideal is to work with uncompressed formats, in order to be able to use the best possible compression according to the technological standard of each moment.

3.5.2 Open and Proprietary Formats

When it comes to the property of a format, we can classify it as either open or closed. The closed formats have an owner, and a license could be needed to use the codec in order to create or open the file.

Open formats are AIFF/AU/FLAC/Ogg/Vorbis;

Proprietary formats are MP3/AAC/MP4/WAV

3.5.3 Digital Music Delivery

A problem for the digital distribution of music is the lack of standardization in delivery methods between the many platforms populating the ecosystem of online musical services.

There are two basic aspects to keep in mind:
On one hand, there is the information related to each song – the metadata (all the info describing the song, and which help identify it). This data is vital, for many reasons. Not only for the user's convenience, but also for the correct distribution of the revenue generated by the song, and to make sure the song (file) always contains the same information, regardless of its origin.

Each song features unique data:
The ISRC code is a unique identifier that can be permanently encoded into a physical and digital audio recording. MROs assign ISRCs to their recordings so that each recording can be clearly and unambiguously distinguished from others, across complex value chains.

Unique Product Code (UPC) is a specific type of barcode that is used to track sales of digital product – songs and albums.
Printed barcodes track sales of the physical product – audio CD or vinyl.

The combination of the first two or the three of them should make each song easily identifiable.

On the other hand is the information regarding the artist and possible co-right owners or participants in the song.

All this information is vital, however, unfortunately no unique distribution system exists. Depending on the format and the version of the ID-tag system used, the data enclosed in a digital audio file can differ. Some formats, like WAV, do not allow the embedding of data, so

it has to be delivered with spreadsheets linking the audio files with the data.

Let's imagine for example an artist sending all the songs from their discography to a certain platform, or a label delivering its entire catalog, or even a distributor giving a platform every song from every label it represents. That is a lot of data. Unfortunately, there is no unique, standardized method that allows them to do so. Each distributor, MRO and platform has their own way.

However, it looks like one system is getting the upper hand, even though it's still far from being the standard that covers everybody's needs, according to some distributors and platforms: the DDEX system.

Digital Data Exchange (DDEX) is an organization that aims to design a format for the exchange of metadata across the digital content value chain. The method they've developed uses the XML format, a language that defines a set of rules according to which documents are encoded in such a way that they can be read by both humans and computers. What it boils down to is that with XML, you can create custom tags that can be used to display information. The ideal would be that every MRO, distributor, streaming service and download platform agrees on what those tags should be in order to properly deliver the information needed, which is what DDEX is trying to achieve.

4.   Music Outlets Overview

An overview in alphabetic order of some of the most important digital music platforms and services, taking into account their relevance, level of innovation, and suitability for key music decision makers in the context of audio branding and in-store music:

DIGITAL 7digital.com

7digital is a UK based digital music and radio services platform. They offer B2B services for digital media partners and music download stores. Their customers include several mobile carriers, consumer brands, retailers and broadcasters, but they also cater to end users, offering music downloads in FLAC, AAC and MP3 formats. 7Digital's platforms are apt for the building of products on any kind of connected device.

8TRACKS 8tracks.com

8tracks.com is an American internet radio and social networking website. The idea behind it is that users create playlists consisting of at least 8 songs and share them with other users. Creating an account is free, but they also offer a subscription for 6 months of ad-free use of the site. Since February 2016 the service is no longer available outside the US and Canada, although the platform has hinted at possible access outside those countries through partner platforms, such as YouTube.

AMAZON MUSIC amazon.com/digitalmusic

Amazon Music (previously known as Amazon MP3) is an online music store and music locker (a cloud-type service to store audio files) by Amazon.com. Customers can buy music from Amazon Music in MP3 format only, and have the possibility to play their purchased songs in the Amazon Cloud Player, which is integrated with the store and enable users to store and play their music from their web browser, mobile apps, desktop applications, Sonos, and other platforms like smart TVs.

Amazon Music is available in United States, United Kingdom, Germany, France, Austria, Switzerland, Japan, Italy, Spain, India, and the Netherlands.

AMAZON PRIME MUSIC amazon.com/digitalmusic

Amazon Prime Music is an ad-free, unlimited on- and offline paid music streaming service. It also offers subscribers access to curated playlists and personalized stations. Prime Music is available on Fire tablets, iOS and Android devices, PC and Mac, and of course Amazon's Web Player.

APPLE MUSIC apple.com/music

Apple Music is Apple's paid music streaming service, which can be used offline in combination with the company's iCloud service. Users have the possibility to stream on demand as well as tuning in to playlists curated by so-called music experts, and Apple Music includes a 24-hour live internet radio station called Beats 1, led by DJ Zane Lowe. The service is available on devices running iOS, tvOS, watchOS, Android, OS X, and Windows.

BANDCAMP bandcamp.com

Bandcamp is a US based online platform that works as an on demand streaming service and download store, but not comparable to other services like Spotify or iTunes. Bandcamp serves as a platform for labels and artists, who can upload, sell and promote their music and merchandise, in exchange for a 15% cut of digital sales made from the website, and 10% of merchandise sales (which includes CD, vinyl, T-shirts, books, etc.). MROs are responsible for their own pages, pricing, shipping, and the audio files are offered in all the relevant formats, compressed and uncompressed, with no difference in price between them. The platform has a weekly radio show in which new and notable releases available on Bandcamp are played, as well as interviews with featured artists. Another way for user to discover music is by following other users and seeing what they bought. Users can also follow labels and artists in order to receive notifications whenever a new album or track is uploaded. Bandcamp is available online and on iOS and Android devices.

BEATPORT beatport.com

Beatport is a US based online music store specializing in electronic music, aiming primarily (but not exclusively) at DJs. Music can be acquired in MP3, WAV and AIFF formats.

DEEZER deezer.com

Deezer is a French, web-based music streaming service with both a free, ad-supported subscription option and a paid, ad-free modality. The free options offers standard MP3 quality audio (128 kbs), while the "Premium+" subscription offers high-quality MP3 streaming (320 kbs). The "Elite" subscription, only available for Sonos systems, offers even higher quality audio, FLAC. The platform also features thousands of radio channels and access to curated playlists. Deezer is available for web, Android, Kindle Fire HDX, OS X, BlackBerry, iOS, Windows Phone and Symbian, and can be listened to on other devices such as smart TVs and car audio systems through partnering platforms and apps. It's available in over 180 countries.

FATDROP fatdrop.co.uk

FATdrop is an online platform used by record labels, PR agencies and other music industry professionals to promote their music before it is released by sending branded, watermarked audio files to DJs, journalists and tastemakers, who can only receive the content if they have been previously added to the service by the sender. Fatdrop also offers piracy scanning and YouTube video creation. Similar services are Inflyte and Labelworx.

GOOGLE PLAY MUSIC play.google.com/music

Google Play Music is Google's music streaming service and online music locker. Users can upload and play up to 50,000 songs from their personal libraries free of charge, while an "All Access" subscription (sold in the US, Australia and New Zealand in one bundle with YouTube Red, YouTube's subscription service) gives access to on demand streaming of any song from the Google Play Music catalogue (limited per geographical region), and enables them to create custom radio stations. Tracks can also be purchased, through the music store section of Google Play. With the Google Play Music mobile app, music can also be stored for offline play. The platform offers playback in the following formats: MP3, AAC, WMA, FLAC, Ogg, MPEG-4, MPEG-4 Part 14.

ITUNES apple.com/itunes

iTunes is Apple's media player, media library, online radio broadcaster, and mobile device management application. Users can play, download, and organize digital audio and video on PC, Mac, and Apple's mobile devices. Additionally, the store offers ringtones, and in some countries television shows, audiobooks, podcasts, movies, and movie rentals, all of which can be used on iPhone and iPod Touch (fourth generation onward). Apple's streaming music service Apple Music is accessible from the iTunes application as well. Audio is available in one format only, AAC.

JAMENDO jamendo.com

Jamendo is an online community of independent artists and music fans, where users can upload and share their own music, which most of the time is licensed under a Creative Commons license, and is therefore freely downloadable and usable (within the limits of the CC license). The platform aims at becoming the link between artists who want to share their work and audiences worldwide. Apart from offering free music, Jamendo provides revenue possibilities for artists by selling licenses for music synchronization and background music.

JUNO DOWNLOAD junodownload.com

Juno Download is the digital music store operated by UK online dance music retailer Juno Records. Formats on offer are MP3, AAC, and WAV.

MIXCLOUD mixcloud.com

Mixcloud is a British online music streaming service that works as a platform for radio shows, DJ mixes and podcasts, uploaded by registered users. Users can promote and share their through Mixcloud's own social networking widget.

QOBUZ qobuz.com

Qobuz is a French music streaming and download service, specializing in, but not limited to, classical music. It offers four types of subscription: Basic, HIFI, HIFI Classical, and HIFI Sublime (which includes 24-bit digital downloads at reduced cost). Music can be streamed via the web-based Qobuz Player, or the Qobuz Desktop player for Windows and OS X. Qobuz also has Android and iOS applications, as well as Sonos support. The platform offers CD quality streaming (FLAC), while downloads are offered in hi-res and standard CD quality.

SOUNDCLOUD soundcloud.com

SoundCloud is a Berlin based online audio distribution platform, where users can upload, record, promote, and share their music, offering both streaming and download options. The service is free of charge on both sides, but in March 2016, it started the paid subscription streaming service SoundCloud Go, available only in the US for the time being, where subscribers can listen to songs from major label catalogs in addition to the musician-generated content. SoundCloud is available for web and mobile apps.

SPOTIFY spotify.com

Spotify is a Swedish music streaming, podcast, and video platform. It offers two subscription models, free and ad-supported, and paid and ad-free (Premium). Besides getting rid of the

ads, Premium subscribers can also stream previously selected music offline. The platform offers on demand streaming as well as curated playlists and radio stations based on the user's taste. Moreover, recently Spotify started to offer physical format sale in certain countries. The platform is available in most of the Americas, Western Europe, and Oceania, for web, desktop and mobile apps.

TIDAL tidal.com

TIDAL is an American subscription-based music streaming service that offers lossless audio and high definition music videos as well as curated content. The platform offers two subscription models: Tidal Premium (lossy quality) and Tidal HiFi (lossless CD quality). The service is available for PC, Mac, iOS and Android.

YOUTUBE youtube.com

YouTube is a US based video-sharing website owned by Google. The site enables users to upload, view, rate, share, and comment on videos, while users also use the platform to discover and listen to music. It is, in fact, by far the most widely used music streaming platform. Most of the content is uploaded by individuals, but YouTube is also widely used by media corporations, record labels and other organizations and companies to offer their material, as part of the YouTube partnership program, and despite (or following) several copyright-related conflicts. Since 2015, the platform offers a paid subscription service to its users in the US, Australia and New Zealand, YouTube Red, which allows ad-free access to all YouTube videos, and exclusive content such as movies and online TV shows.

4.1   European Licensed Music Services

A list of licensed digital music services from Europe. It appears on www.pro-music.org. Pro-music is endorsed by an alliance of organizations representing international record companies (majors and independents), publishers, performing artists and musicians' unions:

Albania Deezer *Andorra* Spotify, TIDAL *Austria* 7digital, Amazon, Ampya, Apple Music, Artistxite, Classical.com, Deezer, DG Webshop, eMusic, Finetunes, Google Play, Groove Music Pass, iTunes, JUKE, Ladezone, Mediamarkt, Microsoft Music Store, MyCokeMusic, MySpace, MyVideo, Napster, Naxos, Planet3, Preiser, Qobuz, Simfy, SMS.at, Soulseduction, Spotify, Telering, TIDAL, T-Mobile, VidZone, YouTube, Zed *Belarus* Apple Music, Deezer, Google Play, iTunes, Yandex Music *Belgium* 7digital, Apple Music, Beatport, Bleep, Dailymotion, Deezer, DJTUNES, Downloadmusic, eMusic, Fnac, Google Play, Groove Music Pass, HighRes Audio, iTunes, Juke, Junodownload, Legal Download, Microsoft Music Store, Napster, Qobuz, Spotify, TIDAL, Traxsource, VidZone, YouTube *Bosnia and Herzegovina* Deezer, Google Play, YouTube *Bulgaria* Apple Music, Deezer, eMusic, Google Play, iTunes, Muzikata, Spotify, Telenor, Vivacom, YouTube *Croatia* Cedeterija, Deezer, Google Play, YouTube *Cyprus* Apple Music, Deezer, eMusic, Google Play, iTunes, Spotify, TIDAL *Czech Republic* Alza Media, Apple Music, Bontonline, Clickmusic, Deezer, eMusic, Google Play, iTunes, Mixér.cz, MusicJet, O2, Spotify, Supraphonline, TIDAL, T-Music, Vodafone, Youradio, YouTube *Denmark* Apple Music, Deezer, eMusic, Google Play, Groove Music Pass, iTunes, Microsoft Music Store, Napster, POBit, Shop2download, SoundCloud, Spotify, TDC Play, Telmore Musik, TIDAL, VidZone, Yousee Play (JUKE), YouTube *Estonia* Apple Music, Deezer, eMusic, Google Play, iTunes, muusika24.ee, Spotify, TIDAL, YouTube *Finland* 7digital, Apple Music, Deezer, eMusic, Google Play, Groove Music Pass, iTunes, Microsoft Music Store, Musa24.fi, Napster, NRJ Kauppa Mobile, Spotify, TIDAL, VidZone, YouTube *France* 121 MusicStore, 1D Touch, 7digital, Altermusique, Amazon, Apple Music, cd1d, Daily Motion, Deezer, eMusic, Ezic, Findspire, FNAC Jukebox, Google Play, Groove Music Pass, Hitster, Ina, iTunes, Jamendo, Jazz en ligne, MegaMP3, Microsoft Music Store, musicMe, Musicovery, MySurround, Napster, NomadMusic, Pono Music, Psonar, Qobuz, Radionomy, Reglo Musique, So Music, Spotify, Starzik, TIDAL, Urban Music, VEVO, VidZone, YouTube, Zaoza *Germany* 7digital, Amazon, Ampya, Apple Music, Artistxite, Beatport, Clipfish, Col-legno, Deezer, DJ Shop, DJTUNES, Finetunes, Google Play, Groove Music Pass, HD Klassik, HD Tracks, Highresaudio, iTunes, Jamba, Juke, Mediamarkt, MTV, Musicload (Dixero), MyVideo, Napster, Naxos, O2, Onkyo, Qobuz, SCM Shop, SoundCloud, Spotify, tape.tv, Technics Tracks, TIDAL, Tonspion.de, Vevo, Vodafone, Weltbild, zwo3.net *Greece* Akazoo, Apple Music, Cosmote, Daily Motion, Deezer, eMusic, Google Play, iTunes, Junodownload, mpGreek, MTV, MySpace, Napster, Naxos, Spotify, TIDAL, YouTube *Hungary* Apple Music, Dalok, Deezer, Google Play, Hungaroton, iTunes, Songo, SoundCloud, Spotify, TIDAL, YouTube, Zene! 24/7 *Iceland* Deezer, Google Play, Spotify, TIDAL, Tonlist.is, YouTube *Ireland* 7digital, Apple Music, ArtistXite, Bleep, Deezer, eMusic, Golden Discs, Google Play, Groove Music Pass, iTunes, Microsoft Music Store, MySpace, Napster, Qobuz, Spotify, TIDAL, VEVO, VidZone, YouTube *Italy* 7digital, Amazon, Apple Music, Azzurra Music, Beatport, Deezer, eMusic, Google Play, Groove Music Pass, IBS, InnDigital, iTunes, Jamba, Juke, Microsoft Music Store, Napster, Net Music Media World, Playme, Spotify, TIDAL, TIMmusic, VEVO, VidZone, YouTube *Latvia* Apple Music, Deezer, eMusic, Google Play, iTunes, Spotify, TIDAL, Youtube *Liechtenstein* Google Play, Spotify, TIDAL *Lithuania* Apple Music, Deezer, eMusic, Google Play, iTunes, Spotify, TIDAL, YouTube *Luxembourg* 7digital, Apple Music, Deezer, eMusic, Google Play, iTunes, Napster, Qobuz, Spotify, TIDAL, VidZone *Macedonia* Deezer, Google Play, YouTube *Malta* Apple Music, Deezer, eMusic, Google Play, iTunes, Spotify, TIDAL *Moldova* Apple Music, Deezer, iTunes *Monaco* Spotify, TIDAL *Montenegro* Deezer, YouTube *Netherlands* 7digital, Apple Music, Beatport, Countdownload, Deezer, Downloadmusic, eMusic, GlandigoMusic, Google Play, Groove Music Pass, HitsNL, iTunes, Jamba, Juke, Mega Media, Microsoft Music Store, MTV, Muziekweb, Napster, Nederland FM, Qobuz, Radio 538, Spotify, Talpadownloads, TIDAL, Trackitdown, TuneTribe, VEVO, VidZone, Wildhitz, You Make Music, YouTube, zazell.nl *Norway* 2L Music Store, 7digital, Apple Music, CDON, Deezer, Google Play, iTunes, Microsoft Music Store, Musicnodes, Musikk Online, Napster, Platekompaniet, Spotify, TIDAL, VidZone, YouTube *Poland* Apple Music, Daily Motion, Deezer, Empik.com, eMusic, Gaude.pl, Go On, Google Play, Halodzwonek, interia muzyka, iTunes, Mobila.pl, MTV, Muzodajnia, Muzyka Tu I Tam, MySpace, NuPlays, onet.tv, Orange, Papla.pl, Play The Music, Plus - Muzyka, SoundCloud, Spotify, TIDAL, T-Mobile, Tuba.pl, VEVO, Viva Polska, YouTube *Portugal* 7digital, Apple Music, Beatport, Deezer, Google Play, Groove Music Pass, iTunes, MEO Music, Microsoft Music Store, Napster, Spotify, TIDAL, VidZone, Vodafone, YouTube *Romania* Apple Music, Deezer, Get Music, Google Play, iTunes, Music Non Stop, Orange, TIDAL, Trilulilu.ro, Vodafone, YouTube, Zonga *Russia* Apple Music, Beeline, ClipYou.ru, Deezer, Google Play, Guvera, iTunes, iviMusic, Megafon (Trava), Svoy, Tele2, Yandex Music, YouTube, Zvooq *Serbia* Deezer, Google Play, YouTube *Slovakia* Apple Music, Deezer, eMusic, Google Play, iTunes, MusicJet, Orange, Spotify, TIDAL, Youradio, YouTube *Slovenia* Apple Music, Deezer, eMusic, Google Play, iTunes, TIDAL, YouTube *Spain* 7digital, Amazon, Apple Music, Beatport, Cellfish, Deezer, eMusic, Google Play, Groove Music Pass, HighResAudio, iTunes, Microsoft Music Store, Movistar, MTV, Napster, Naxos, Orange, Presto Classical, Qello, SoundCloud, Spotify, TIDAL, VEVO, VidZone, Vodafone, YouTube *Sweden* 7digital, Apple Music, CDON, Deezer, eClassical, eMusic, Google Play, Groove Music Pass, iTunes, Klicktrack, Microsoft Music Store, MySpace, Napster, Sound Pollution, Spotify, TIDAL, YouTube *Switzerland* 7digital, Amazon, Ampya, Apple Music, ArtistXite, Beatport, Deezer, Ex Libris, Finetunes, Google Play, Groove Music Pass, Highresaudio, Hitparade.ch, igroove, iTunes, Jamster, Juke, Linn Records, Microsoft Music Store, MTV, Musicload,

(Source IFPI)

5.   Conclusions

While sipping our lemonade, in the light of the reasons stated above, we believe it is quite clear that music has definitely transitioned to the digital realm. Today, it is easier than ever before for the general public to access music. The general public also includes key decision makers in audio branding and in store music environments. From the point of view of creators and music related industries, some players jeopardize the viability of the digital music market. All of the above happens in a market that boasts a larger than ever consumer base.

ABC_DJ must take this data into account in order to put at the fingertips of creators, a new window that will add to their revenue system and to the possibility of bringing their music to new audiences, while effectively skipping an extra load of administrative work altogether. This should be a main target in its own right, as crucial as developing new tools that enable a big leap in the relationship between the brands and the ways in which music is used in communication.

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