Popular Music and Society

ISSN: (Print) (Online) Journal homepage: https://www.tandfonline.com/loi/rpms20

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To cite this article: Håvard Kiberg & Hendrik Spilker (2023) One More Turn after the Algorithmic Turn? Spotify's Colonization of the Online Audio Space, Popular Music and Society, 46:2, 151-171, DOI: 10.1080/03007766.2023.2184160

To link to this article: https://doi.org/10.1080/03007766.2023.2184160

Published online: 10 Mar 2023.

POPULAR MUSIC AND SOCIETY
2023, VOL. 46, NO. 2, 151–171
https://doi.org/10.1080/03007766.2023.2184160

Routledge
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One More Turn after the Algorithmic Turn? Spotify's Colonization of the Online Audio Space

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ABSTRACT

In the last decade, development of algorithmic recommendation systems has constituted the main competitive factor between music streaming services. In this article, we identify how a new turn, labelled 'the auxiliary services phase', is rising to prominence. We analyze Spotify's move from being a mere music distributor, to becoming a general provider of audiovisual content – involving investments in podcasts, vodcasts, audiobooks, etc. – where expanded service offerings and exclusive content development constitute increasingly important platform strategies. Although this turn empowers innovation, it is worrisome from a music industry perspective as it challenges power balances between music industry and platform actors.

KEYWORDS

Audio-first; auxiliary services; music streaming; platformization; podcast; Spotify

Introduction

Over the last fifteen years the rise of platform-based streaming has reshaped the music industry, and, along the way, Spotify has spearheaded the development of new business models and technological innovations (Eriksson et al.; Hracs and Webster). From implementing subscription-based payment models to pioneering innovations of algorithmic recommendation systems, Spotify has become a world-leading purveyor of music distribution, discovery, and consumption – reaching over 365 million users across 178 markets, accounting for over 20% of global music revenue (Spotify, "Company Info"; Loud and Clear). Spotify is, however, a constantly changing platform: From being a dominant premise provider and content distributor of music in the past decade, the platform has, in recent years been moving toward a more universal domain, gradually providing more and more audiovisual content of all sorts. In this article, we analyze these changes, synthesizing perspectives from platform studies and music industry studies, seeking to map evolving platform strategies and the competitive positioning of Spotify in the streaming market.

We detect three new paths in the development of Spotify that have become apparent at the turn of the decade. The first concerns the focus on podcasts and other non-musical audio content (such as audiobooks, live audio, news, etc.); the second concerns the

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inclusion of human and machine-generated audio content (including the controversies associated with soundscapes, "fake artists," royalty free, and AI-generated music, surrounding Spotify in recent years), while the third entails investments in live streaming of concerts and other audiovisual content (such as music videos, vodcasts, and talk-shows). As these paths chart Spotify's move away from the "music specific" and toward the general "audiovisual" (coinciding with what has been labeled the "audio-first strategy" by Spotify CEO Daniel Ek), they tell us something about emerging logics within contemporary platform developments – where expansions of content and service offerings, the focus on exclusive content, and the move from on-demand to live streaming, are becoming increasingly important (Maasø and Spilker).

Although these moves might expand user offerings and bring promises of content innovation, they are also deeply worrisome from a music industry perspective – as they challenge power balances between music industry actors and technology platform actors. Thus, our two research questions are as follows:

RQ1: *Which strategic patterns of development characterize today's platform-based music streaming?*

RQ2: *And what might the consequences of these patterns be for music industry actors?*

The logics behind music streaming platforms have already gone through several turns, and various researchers have over the last fifteen years mapped and defined the growth of these platforms in different ways. Maasø and Spilker divide the history of music streaming into three phases. In the *first phase*, which they call "the unlimited access phase" and date from 2008 to 2011, the basic sales pitch of music streaming involved the move from limited ownership of some music to unlimited access to all music. The new services promised to cater to any musical tastes while transcending storage restrictions and various other obstacles, making endless musical discoveries possible. However, the services soon faced two main challenges: the first was how to distinguish themselves from each other when they all offered more or less the same content; the second was how to help users navigate through the vast abundance of music in their catalogs.

In the *second phase*, "the social streaming phase" (2011–2014), the services sought to meet both these challenges by introducing social media features and fostering communities among their users. Users gained the ability to befriend or follow people if they knew them or liked their musical tastes, exchange tips and recommendations, and share playlists and libraries. The main marketing terms were no longer "access" and "discovery," but "social" and "sharing." Indeed, the tight business cooperation and partial technical integration between the Facebook and Spotify platforms was indicative of the period's digital intersections. Interestingly, this strategy was abandoned after a relatively short time, partly because the new features were not used or appreciated as much as anticipated.

The *third phase*, "the algorithmic streaming phase" (2014–2022), was part of a broader technological trend across all internet-based platforms (and beyond), one referred to as the "algorithmic turn." Its new buzzwords were "personalization" and "customized services" – advantages connected to the development of "smart algorithms" and other methods for harvesting "big data" that was taking place amid intensified commercialization and competition across all internet platforms (van Dijck et al.). Most of the innovative efforts and investments of the late 2010s occurred within this field in the interests of developing and improving algorithmic features based on musical similarity, the user's listening history, or aggregates of listening patterns.

Spotify is famous for having gained a competitive advantage by investing early and heavily in algorithmic recommendations. However, as Hracs and Webster point out, toward the end of the 2010s this advantage had been more or less zeroed out, as most services had reached approximately the same level of technical refinement. We understand the recent changes in Spotify's strategies in light of this leveling out – as indicated in the title of our article. And if we are entering *a fourth phase* in the development of platform-based music streaming – how should it be denominated? Are there any common traits in the new strategies that can be summed up and grouped together, or are they separate maneuvers that diverge in different directions?

In the next section, we will expand our theoretical framework by introducing relevant concepts from platform studies and music industry studies. Following a description of our method, we then move on to an elaboration of the three paths (presented in the introduction), which we believe are representative of Spotify's latest turn. Based on our theoretical framework, and in particular Spilker and Colbjørnsen's five dimensions of what constitutes the dynamic and multifaceted concept of platform-based streaming (a framework we will develop in the theory section), we move into a discussion about what constitutes the current dimensions of Spotify.[1] We wrap up by conceptualizing what we consider to be the next phase of platform-based music streaming.

Theoretical Perspectives and Concepts:

Platform Studies Perspectives

The concept of platformization, as it is defined by Nieborg and Poell, forms a critical lens by which to assess strategic developments of platform companies. While gravitating toward the center of contemporary media and communication studies, the concept of platformization has come to describe the ever increasing cultural and social significance of online platforms – and the ways in which these platforms affect both economic and cultural infrastructures. In line with the rapid emergence of social media and online streaming platforms (as well as the growth of digital marketplaces, search engines, and other types of platforms in all sectors of society), platformization represents the rise of the platform as the "dominant infrastructural and economic model of the social web" (Helmond). While attracting attention across various research disciplines (e.g. software studies, business studies, cultural studies, and political economy – see Nieborg and Poell for an extensive overview of this literature), the platformization literature has taken a strong and critical stand by emphasizing how cultural markets have come to be dominated by the ever-growing, economic regime increasingly referred to as "platform capitalism" (Srnicek).

Consequently, large global media platforms have become the subject of growing criticism over the last decade, as a small handful of actors have taken a dominant position by "colonizing" the previously open Internet (Sujon). In contrast to the democratizing effects the Internet was thought to have on culture and society at the turn of the millennium (Anderson; Benkler), the pervasive integration of the so-called GAFAM-quintet (Google, Apple, Facebook, Amazon, Microsoft) in people's everyday lives, has brought critical concepts such as "platform dominance" (Coyle), "platform power" (Van Dijck et al.), and "platform imperialism" (Jin) – that is the continuation of American imperialism through the exploitation of online platforms (Jin 40) – to the table.

All along the field of music has been at the forefront of the development of platformization, and in the last decades, streaming platforms such as Spotify, YouTube, and Apple Music have increasingly consolidated power in the industry by bringing new economic, organizational, and production logics into the market. Through a search and recommendation logic, these platforms connect audiences, producers, and advertisers by storing and distributing a wide range of content, allowing audiences to dive into "unlimited" amounts of music in exchange for a monthly fee and exhaustive user data (Gillespie, *Custodians*). By introducing subscription-based business models into an industry historically structured around the buying and selling of physical goods (LPs, CDs, cassettes), these platforms have altered the ways in which music is produced, consumed, and financed. Consequently, there is a growing body of research investigating platform effects on the music economy (Nordgård; Tschmuck), copyrights (Kjus and Jacobsen), usage (Lüders et al.), discovery (Eriksson et al.; Maasø and Spilker), production (Morris; Prey), and the distribution of power within the industry (Hagen; Marshall).

There have been ongoing attempts to conceptualize what constitutes streaming as a media industry phenomenon (Cunningham and Craig; Herbert et al.; Lotz). In this article, we build on Spilker and Colbjørnsen's definitions, which capture the concept as "dynamic and multidimensional," emphasizing how different platforms and their industrial solutions vary within and across different media industries (their study includes platforms for streaming of audiovisual, audio, and textual content as well as social media platforms with streaming features). Moving beyond definitions of streaming platforms as "sealed technological systems," they argue that streaming is an evolving concept consisting of a variety of logics that are continuously open to negotiation. They identify five key dimensions in which streaming platforms position themselves to compete with each other: professional versus user-generated streaming; legal versus piracy streaming; on-demand versus live streaming; niche versus general audience streaming; and streaming on specialized versus multi-feature platforms. Overall, these dimensions locate various platform strategies (Parker and Van Alstyne) that form the most important continuums in which today's streaming services are presented. Spilker and Colbjørnsen conclude by pointing out a series of trends in the contemporary streaming landscape at the turn to the 2020s. Some of the most relevant for our analysis include the increased focus on exclusive content, the downfall of traditional forms of piracy accompanied by the rise of new forms of piracy, the live-streaming trend, and the "imperative" of successful platforms to reach new user segments and to add new features (strategically combining, packaging, and bundling different services together). In our analysis, we will elaborate on and make use of these dimensions and trends to better identify the anatomy of Spotify's new turn and the contours of the competitive landscape of which the company is a part.

The Music Industry in the Age of Streaming Platforms

Looking at the music industry through the lens of platformization, we learn how the development of streaming disrupts established economic and distributional logics of the market, challenging and restructuring orthodox power-hierarchies of the industry. Looking at the history of the music industry, however, we learn that it contains more or less continual disruptions and controversies over how to tackle new media inventions. From the infancy of printing and selling note sheets, through the invention of media for sound storing and retrieval, various disputes related to the illegal exploitation (and legal protection) of music copyright, have come to shape the industry (Norman). Throughout the 1900s, the rise of (and the use of music in) film, radio, and television opened unregulated territories and led to piracy phases that had to find juridic solutions in new forms of media regulation. Lessig argues that in every case, after turbulent periods, regulatory authorities (or the industries involved) managed to create laws representing a sound balance between the interest of the rightsholders, distributors, and users – without destroying the potentials of the new technologies.

In the case of the internet and the rise of what has come to be known as the "piracy wars" of the early 2000s, the industry tried to hinder unauthorized mass-circulation of music in illegal file-sharing networks, by imposing new copyright laws and digital rights management technologies (DRM) – without succeeding (Gillespie, "Wired Shut"). Although mass anti-piracy campaigns were carried out, the situation did not stabilize until actors of the tech industries introduced streaming, toward the end of the decade. (This also, importantly, involves download-for-pay services such as iTunes, which were very influential in the upheaval to get customers to pay for music online.) With the promise to provide user access to the vast reservoirs of music to which we had become accustomed, while at the same time letting the industry regain some control over its products, streaming gained traction – gradually becoming the dominant form of music distribution (Spilker).

While streaming has facilitated a new balance between the involved stakeholders, it is, however, a fragile balance with which none of the actors seem to be truly satisfied. The record companies have never accepted a business model based on renting away their catalogs, while artists complain about marginal revenues. Users, on the other hand, feel manipulated and overridden by platform politics, while the tech companies complain about the bureaucracy and rigidity of their counterparts (Spilker). While the step into the algorithmic phase of music streaming has carved ground for a more cooperative period of music streaming, as the investments in advanced algorithm development, based on big-data exploitation, have given both the platforms and the record companies unprecedented opportunities to influence music consumption (and thereby increase their revenues),this period has also led to the somewhat paradoxical amplification of what has been labeled the "superstar economy" in the era of plenty (Maasø and Spilker), ultimately concentrating power among a few, dominant stakeholders.

Studying the case of Spotify, we address what seems to be a move away from the algorithmic phase, analyzing it from both a platform-logic perspective and a music industry perspective. The changing strategies of the platform threaten to shake the balance of the 2010s. As new actors enter the scene (providers of oral and written content, as well as the live music sector), the platforms themselves move from being mere distributors to functioning as creators and owners of content. How much turbulence will we experience this time?

Method

This article serves as a case study of Spotify's recent industrial turns and the music industry's critical responses to these. The study follows a qualitative mixed methods approach, basing its empirical data on three different sources.

The first is an analysis of 1,185 press-releases retrieved from Spotify's website newsroom.spotify.com, between April 2018 and June 2022. Newsroom.spotify.com serves as the platform's press outlet, sharing press releases, news and other relevant material concerning the platform. Divided into four categories ("What's New?" "Culture and Trends," "Behind the Mic," and "Inside Spotify"), it covers various aspects of Spotify's mechanisms and developments through the launches of different acquisitions, promotions of new platform-tools, financial reports, etc.

The second source is a press coverage analysis of Spotify's presence in Norwegian media (April 2018-June 2022). Through strategic searches in the online media archive *Atekst*, we collected 667 articles, retrieved from 15 online newspapers. These include five of the most prominent media outlets in Norway (VG.no, Dagbladet.no, NRK.no, TV2.no, Nettavisen.no), five newspapers focusing on media, technology, or economics (M24.no, DN.no, Tek.no, ITAvisen.no), and five newspapers focusing on popular music culture (Gaffa.no, Nattogdag.no, 730.no, Musikknyheter.no, Ballade.no). To delimit the search, we included only articles where the word "Spotify" was present in the title or the preface.

The third source is based on qualitative interviews with 11 Norwegian music industry actors conducted in the winter of 2019–2020. These consisted of decision makers in major record companies (Sony, Universal, The Orchard), interest groups (IFPI, Creo, FONO, GramArt), copyright corporations (TONO), and publishers (Nordic Rights). Additionally, we conducted an interview with a Spotify executive. This appears as a unique source in the mapping of goals and intentions behind Spotify's strategies and constitutes a rare "insider perspective" in studies of global tech companies, as such executives are generally reluctant to participate in research like this (Sundet). Overall, the sample included 5 women and 6 men with ages ranging from 34–59 years, all of whom had a minimum of 12-years experience within the industry (thus having experience with, and professional insight into, the music industry's digital transformation). All the informants worked in Oslo, the center of the Norwegian music industry.

The press releases and the press coverage were reviewed and filtered out based on their relevance to the study before they were coded through a theme-based analysis strategy (Ritchie). This involved identifying themes across the articles, highlighting specific developments of Spotify. Through an open and inductive coding, key categories were identified and used to synthesize the analytical concepts of the following analysis (Sarker). In turn, the interviewees supplemented our discussion by bringing in critical perspectives related to the developments we had identified, highlighting the challenges these pose for the industry. As a "bounded system" (Stake), the strengths of such case studies are that they allow for detail and in-depth complexity in the phenomenon which the study examines (Flyvbjerg). In that sense, our three-source approach undertakes to obtain (and outline) a somewhat holistic perspective of Spotify's recent movements. Whereas Spotify's own communication strategically informs us about and justifies the platform's own interests, the press coverage helps to highlight and problematize various trends, controversies, and other stories surrounding Spotify, which the platform does not cover externally. The interviews contributed, in turn, to discursive data commenting on the effects of (and the industrial challenges associated with) Spotify's strategical turns.

Altogether, our data mainly concerns the discourse surrounding the developmental patterns of Spotify, of which each of the sources complement each other, ultimately producing a more complex and nuanced analysis. The data is, however, less involved in producing understandings of how these patterns are more explicitly articulated, implemented, and used on the platform (something of which, e.g. an analysis of the platform interface or consumer usage potentially could have elaborated on). Moreover, the analysis emphasizes to a lesser extent the divergent perspectives and value positions that distinguish the different industry actors interviewed. The actors represent different interests and objectives (as the selection spans both representatives from global, powerful companies and more local, politically engaged interest organizations), and thus does not necessarily constitute a unified group. We must emphasize, however, that the material did (somewhat surprisingly) reflect a certain consensus on which the various opportunities and challenges the industry faces as a whole, according to the issues addressed in this article. Importantly we must take into account that the representative of Spotify itself thus, in turn, occupies a distinct position as a defender of the platform's strategic decisions and choice of path, that (to some extent) stands in opposition to the reflections posed by the informants representing the music industry.

The aim of case studies is often to develop concepts or theories that can form the basis for theoretical generalizations (Yin). In this case, Spotify is strategically selected as a typical unit representing a more comprehensive universe, where the study's results should be understood in a larger context and in the framework of other coinciding studies. It can be challenging, however, to derive general considerations about (and causal relationships between) such phenomena on the basis of a mere one-unit study, as several external occurrences often affects the given outcome. In this case, the "Spotify case" thus acts as one unit exemplifying one direction in which the larger and more comprehensive universe of music streaming could be developing.

Analysis:

In the following section, we present a systematic account of Spotify's move toward the general audiovisual, through the three paths we have identified. While the first path goes in-depth into Spotify's commitment to audio, the second path scrutinizes different controversies and cases of streaming manipulation, surrounding Spotify in recent years. The third path employs a forward looking point of view and discusses the possibilities for (and the challenges associated with) the platform's inclusion of video-based content.

Audio First

The most obvious and pronounced development of Spotify in recent years can be summed up through its "audio-first strategy." As early as 2015, Spotify announced that podcasts and other "self-produced content" would be included on the platform, and in 2018 the company made its first exclusive distribution agreements with well-known names in podcasting (such as Joe Rogan and Michelle Obama). In February 2019, founder and CEO Daniel EK declared that the platform's priority goal was to become "the world's number one audio platform" (Ek). As a "moving object" (Fleischer and Snickars), the platform has thus launched a strategic transformation, from being a dedicated music platform to becoming a more general audio and entertainment platform.

In general, the audio-first strategy means that Spotify is becoming equally committed to the formats of podcasts, audiobooks, and other hybrid forms of auditory content, as it is with music. This commitment also includes everything from radio theater, news, and "live audio," to so-called "short stories," poems, and "guided meditation." (Those are the different types of auditory content to which we find Spotify referring in our data.) (Spotify, "Get Your Fill"). Spotify refers to this content as "spoken word" and to its creators as "storytellers" – a presumably strategic reformulation, which together with the word "audio" expands or blurs the boundaries of what can and cannot be included on the platform (Carraro). In this landscape, productions mixing podcasts with music (so-called "Shows with Music") have emerged as what Spotify describes as "a new listening experience that brings together music and spoken-word content in an easy and elegant package" (Spotify, "Spotify Launches"). Concurrently, users are invited to create and distribute user-generated content, exploring the intersections of previously separated media formats (e.g. by combining playlists with spoken-word through the application "Music+Talk"). While tracing various acquisitions, the mergers with, e.g. Anchor, Whooshkaa, and Megaphone all reflect Spotify's investments in podcast (Spotify, "Spotify Is"). The collaboration with Findaway, in turn, testifies to the platform's move into the audiobook market (Spotify, "Spotify to Acquire"), whereas the launching of "Spotify Live" (a discussion application similar to the platforms of Clubhouse and Twitter Spaces), the acquisition of "Locker Room" (a live-audio app facilitating online conversations about sports), and the materialization of "live podcasts," all demonstrate the company's exploration of "live audio" (Spotify, "Spotify Acquires").[2]

A key to Spotify's audio-first strategy is the effort to gain control and ownership of the content it distributes. One of the most central drivers of this development, as argued by several of our informants, is the platform's subscription-based business model, where the rightsholders' revenues are generated based on the total consumption (the total number of streams) on the platform. In the music industry, major record labels, publishers and (increasingly) other stakeholders are managing the most lucrative copyrights, and as traditionally popular catalogs of the music history (Bob Dylan, David Bowie, etc.) still constitute the largest proportion of streams on the platforms, we are witnessing today a tendency of financially prosperous investors to invest in music copyrights (Aune). In the long run, it is believed that these rights will continuously generate significant profits. As one informant points out, "If you own the rights to the Beatles' or Pink Floyd's catalogs, you have a steady and nice stream of income, over a long-term horizon."

As Spotify neither owns the music it distributes, nor has the finances to out-compete these investors in the battle for music copyrights, the shift toward audio works as a strategy providing Spotify with increased opportunities to gain control and ownership over supplementary audio-based formats. The podcast market, which until recently was considered somewhat fragmented and immature (Sullivan), was early identified as a free domain open for conquest – where both in-house productions and buyouts of podcast rightsholders, were considered a cheap way to acquire exclusive content – without having to negotiate trade-regulated contracts with established industry players. Our informant representing Spotify, confirms this:

> "[Unlike] the music industry, where record companies own the copyrights . . . there is no representation in the podcast industry: there are no managers, there are no record companies. With podcasts, we can therefore work directly with the creators. . . . It's like the wild west – anything is possible" (Spotify executive).

Through investments in podcasts, audiobooks, and live-audio formats, so-called "Spotify Originals" are therefore gaining more and more ground on the platform (Spotify, "Spotify Shares").[3] This is content written, produced, or owned by Spotify itself. By executing exclusive ownership, Spotify does not only save itself the cost of royalty payouts (through copyright buyouts or financially, beneficial agreements with rightsholders), but also takes control over several points of the distributional value chain of the content of which it disposes. In the same way that platforms such as Netflix or HBO have taken on the role as film and television studios, Spotify is thus becoming content producer, rightsholder, distributor, and promoter – on a platform where it facilitates visibility, administers revenues, and prepares for user consumption.

This way of controlling the market has met with strong skepticism among our informants, where the concern that Spotify will "financially and editorially" prioritize "exclusive and original content" (at the expense of independent content),[4] is particularly widespread. On the one hand, some informants point to how Spotify may end up operating in a space where the distribution of revenue becomes skewed between "originals" and the remaining portfolio of content. On the other hand, these biases can become exacerbated through Spotify's editorial control over exposure (the control over what content will be editorially or algorithmically recommended) – a plausible concern when one compares Spotify with equivalent platforms, demonstrably promoting its own originals (Tallerås et al.).[5] As this is considered to be an ongoing trend across different streaming platforms, one informant representing an artist interest organization sketches what he labels a "horror-scenario," imagining a future where creativity and artistic production are centrally controlled by a small handful of big tech companies:

> We now have a few players who set the terms for everything. . . . I think we must consider these aspects in the context of competitional law. Because the biggest players will keep getting bigger. And when these players grow, they will easily embrace their own interests and start doing everything "in-house." Finally, we might find ourselves in a horror scenario where all the books are written by Amazon, all the films are produced by Netflix and where all the [audio] is produced in Stockholm. (Artists organization representative)

Altogether, Spotify's audio-first strategy seems, however, to assure success. In 2021, its podcast revenues had increased by more than 300%, alone generating close to \$200 million. Spotify estimates that podcasts will turn out to be a multibillion-dollar business in the following years. Based on this progress, the company states that they will continue to "add new format verticals" to the Spotify app in the future (Spotify, "Spotify Shares").

Music Second

Moving past podcasts, audiobooks, and live audio, the effects of Spotify's turn beyond music provides fertile ground for a number of other (somewhat obscure) forms of auditory content. These phenomena are neither marketed to the same extent as, e.g.

podcasts, nor part of Spotify's stated audio-first strategy explicitly, but phenomena gaining foothold on the platform by exploiting the economic potentials of Spotify's revenue models. In this analysis, we divide this content into "non-artistic content" and "non-musical content."

Non-artistic content defines content optimized for streaming (Morris), without identified (human) origin. For Spotify, the large number of "fake artists" symptomize this development. Without any presence outside Spotify's own ecosystem (no websites, no concerts, no promotional material), fake artists provide (somewhat) generic instrumental music, designed to slip into mood-based playlists, crafted for the uses of relaxation, concentration, meditation, or the like. A major investigation in 2017, suggested that fake artists had direct licensing agreements with Spotify, purposely aimed to save the cost of royalty payouts (Morris). In the same category, AI-music constitutes a rapidly growing "non-artistic" phenomenon on Spotify, and in East Asian markets various hologram artists are now conquering the pop-music culture (Spotify, "Avatar"). The AI-avatar Hatsune-Miku is an example of this, which through the software Vocaloid performs and composes music digitally, slowly becoming a prominent pop-cultural figure (through collaboration with artists such as Lady Gaga and Pharrell Williams) (Spotify, "Avatar"). Although these phenomena still occur outside Spotify's ecosystem, our press-coverage analysis shows how the platform is investing in AI production technology, and in 2017 Spotify hired computer researcher François Pachet to assist and develop tools for music creation based on AI technology (establishing the AI-production lab "Spotify CTRL") (Music Alley, "Benoit"; Ingram). Following the criticism leveled at fake artists, speculations concerning Spotify's aim to craft its own pool of AI avatars (composing and performing as Spotify Originals), frequently occur (Fergus). Through their non-human nature, AI music producers might thus arise as cultural creators without legal rights to royalties, potentially downgrading the importance of human presence in music in the long run.[6]

Non-musical content is a related phenomenon. Today, large selections of tracks, which do not contain tones, melodies, rhythms, or any other musical features, occupy large parts of Spotify's playlists. Coming in various forms of white noise, nature sounds, or even silence, these tracks serve as "soothing soundscapes" that gather millions of streams and consequently massive shares of Spotify's pro-rata-based royalty payouts (Eriksson et al.; Morris). Although most of these phenomena are not part of Spotify's stated audio strategies, we find examples of the platform promoting "non-music" on newsroom.spotify.com. For example, Spotify is highlighting different "sleep" and "meditation" playlists consisting of various atmospheric natural sounds and other sonic content (such as rippling waves, crackling fireplaces or howling winds). The related phenomenon ASMR (autonomic sensory meridian-response) is also promoted in Spotify's press releases (Spotify, "ASMR's Soft Sounds"). This is a growing genre in Spotify's universe, described as "relaxing braingasms" that follow when a voice intimately whispers in the listener's ear or when the listener hears the sound of paper curling, coins ringing, or bubble wrap popping.

Several of the challenges associated with the audio-first strategy are also relevant to the controversy surrounding this content. In our interview data, these phenomena are referred to as "royalty-free music," being described in speculative terms as methods for saving the cost of royalty payouts. Although Spotify over the years has repeatedly dismissed the allegations concerning fake artists (Morris), Swedish media breathed life into these speculations again, in the spring of 2022. While detecting a total of 830 fake artists associated with the Swedish record company Firefly, the newspaper *Dagens Nyheter* found 20 songwriters composing music for 500 artists alone (attracting 7.7 million listeners per month) (Talseth). While claiming that key people in Firefly's management have close ties to well-known Spotify executives, they ultimately claimed to reveal how Spotify specifically hires songwriters to produce instrumental music for its Chillout playlists.

Our interview data confirm that there are strong suspicions among the industry players that these practices are widespread within Spotify. One informant working within a global music distribution company went as far as to say that royalty-free content is among the biggest challenges the industry faces:

> I think the music industry's biggest competitor is other use of audio on the services. This can be sound effects like "rainforest," "thunderstorm" and other such things, which get an extremely huge number of streams. This is content that is very cheap to produce, easy to publish . . . and that ultimately steals shares from the music. People like to put these effects in the background when they sleep, or it gets played at a massage parlor 15 hours a day. (Record company representative, 14 January 2020)

One must be careful not to assume that these practices are signs verifying Spotify's move toward ownership and control, as far as these speculations are merely unconfirmed rumors. Our press coverage analysis, however, reveals that this is a much-discussed controversy throughout the industry (and the public eye in general). Representing more or less the same challenges, the investments in AI-music was, on the other hand, altogether less discussed in our data. Although this practice has not yet gained a foothold in the market, as the attempts being launched have been largely written off as a "threat to authenticity" (Modugno), several of the informants believe it is only a matter of time before this practice establishes itself in the market:

> I think it's only a matter of years before the technology becomes good enough. And when Spotify or Google then can push 20 million AI works into their catalogs, and there's not a single copyright holder left, then they have ruined the livelihood and income-base for many, many composers. (Copyright organization representative).

Altogether, the vast majority of our informants expressed distrust of the system and business models of Spotify, as the subscription-based solutions that favor quantity, are facilitating for manipulation and economic optimalization of the platform's logic (Morris). We must mention, however, that much of this criticism is directed at practices established outside Spotify, including click farms selling streams through fake accounts, or services such as Epidemic Sounds, operating in a similar manner to "fake artists" (basing their model on buying out copyrights for music optimized for contexts and moods) (Music Alley, "Epidemic"). As several of these activities maneuver in gray areas in terms of legality, one might question the extent to which the "ghost of piracy" continues to haunt the music industry.[7]

Video Next?

Spotify's audio-first strategy demonstrates the platform's imperative investments in developing the audio formats of the future. The controversies surrounding patterns of platform manipulation, on the other hand, add to the (eventually quite long) series of cases involving platform ethics and accountability, in general (Steen). Altogether, these strategies testify to Spotify's very strategy of putting audio-based media-formats, in every shape possible, *first*. Through our analysis, however, several paths of expansion emerge. Paths that lead us to question whether video is becoming the *next thing*, as different launches of new platform tools, acquisitions, and collaborations with players of both the film, television, and sport industries, are increasingly taking place.

This presumed audiovisual turn is asserting itself in several ways. One could, for example, say that the platform's exploration of virtual concerts during the pandemic was an expression of this development (an experiment culminating in a corona concert series during the summer of 2021, involving headliners such as the Black Keys, Leon Bridges, and Girl in Red) (Spotify, "Must See"). Furthermore, the platform's debut of music videos in 2018 (as Calvin Harris and Dua Lipa's song "One Kiss" was exclusively promoted on Spotify), and the launching of Spotify Canvas (the short video loops played alongside various tracks as "music visualizations"), are both examples indicating an aim to tap into the domain of audiovisual streaming – an expansion that, following these examples, might actually help to strengthen the platform's foundational focus on the product of music.

However, one could also say that the rollout of "vodcasts" represents this turn (Spotify, "Listen"). *Vodcast* is an abbreviation for "video-on-demand cast" and embodies, in the simplest terms, a video version of a podcast. Although still operating as somewhat simple measures for visualizing audio (often through single-camera, low-budget productions), more and more producers are developing this format in the direction of what we may recognize as traditional talk shows, and other known film and television genres (ultimately suggesting how Spotify is moving into video streaming, offering original shows and TV productions). A sidetrack of this development is also observed through the platform's collaborations with film and television players such as Netflix, HBO, and Chernin Entertainment, whereas the platform is increasingly opening up to parallel solutions involving music, podcasts, film, and television (e.g. through adaptations of Spotify Original podcasts) (Spotify, "Spotify and Chernin").[8] While this has not dominated Spotify's platform yet, these developments – extending the audio-first strategy – raises questions of whether Spotify ultimately is targeting a more general media and entertainment market.

While Spotify's audio(visual) turn must be considered a response to industrial demands for growth, it is, however, a strategy countering the challenges the music streaming market has combatted in regard to "platform parity" (Hracs and Webster), whereas the act of differentiating, specializing, and competing in aspects beyond that of content, price, or functionality, has posed a key-challenge. For Spotify, this compelling competition is also dictated by rival tech companies which in their base of business are "multi-purpose." Apple derives most of its revenue from hardware sales (iPhones, iPads, Macbooks); Amazon distributes and sells an abundance of products (books, movies, sports, groceries, etc.), while Google and Meta, with its colossal impact, annex to such diverse domains of online life that dedicated niche-platforms strive to compete.

Moreover, Spotify depends on these companies as their main application is offered through products and services such as smartphones and online app stores.[9]

Through this lens, Spotify's strategies might be considered plausible. As competitors draw revenue from elsewhere, subscription fees are pushed down to a level that, in the end, challenges Spotify's foundation to generate dividends (a tendency one of our informants labels "the race to the bottom"). As long as Spotify remains the biggest player in music streaming, however, actors of the music industry are at the mercy of Spotify's movements. As of 2023 Spotify still experiences growing audience traction. Thus, the costs of not being present on the platform becomes increasingly harder. For our informants, the conjunction of Spotify's expansion, and the so far static subscription fees (of approximately $10 per month) thus foster concerns about diminishing market shares for the music industry. The expansion of content represents, first and foremost, a strategy enabling Spotify ownership and a way of saving the platform the cost of royalty payouts, whereas Spotify's income grows through audiences increased use of "Spotify Originals." One informant states the following: "The fact that a listener spends half his day listening to podcasts, instead of music, has a negative impact on the amount of music to which he listens." Consequently, it is problematic that Spotify puts – as another informant states – "everything else in the $10-subscription" – where the same pot, the same subscription fees, generated by the same users, will eventually be distributed over a multitude of formats, industries, and rightsholders. One informant, representing an artist interests' organization, says the following:

> If you dilute the service by putting a lot of other things in it, without increasing the price, then there will probably be less money for music. … To put it bluntly: [Other content] is taking a big part of a cake that, unfortunately, is not getting any bigger. Spotify has not increased the price even though it has put new services and more content in on its platform. Finally, one might ask: What happens the day Spotify puts a TV-series or a movie on its platform as well? (Artists organization representative)

These statements testify to a concern and uncertainty about how the platform will develop. All the changes, all the twists and turns we describe in this article, that have come to characterize the development of music streaming, have made music industry players find it unpredictable to maneuver in the market. One informant representing a major record-label puts it this way: "Our competitor is *everything other than music* that may enter their universe. And I see it coming: Spotify is going to be an entertainment-platform. The question is: How do we equip ourselves then, as music-providers?" (Record company representative. 22 October 2019).

Ultimately, Spotify's audio(visual) turn should be seen in the context of a total struggle for audience time and attention – a struggle which the research literature calls the "attention economy" (Davenport and Beck). Within the framework of a larger platform-ecology, there is thus consensus among our informants that the competitors of music exist in all possible aspects of both on- and off-line life. One informant simply states, "We know we are competing for people's time – and we get paid for the time they spend on music."

Discussion:

Dimensions of Spotify

Our analysis illustrates the evolving phenomenon of streaming and the developing strategies of platform companies, as suggested in the platformization literature (Nieborg and Poell). In the theory section, we presented Spilker and Colbjørnsen's "dimensions of streaming," as constituting the most important continuums within which streaming platforms operate. We will now discuss our findings in the light of this framework.

In the dimension spanning the continuum of *professional to user-generated content*, Spotify's investments in exclusive content coincides with what Spilker and Colbjørnsen describe as a general movement toward professionalization of the entire streaming market. For Spotify, this movement constitutes an abrupt change of direction. From its origin as a somewhat "sealed platform," exclusively distributing professionally produced music through agreements with well-established record labels, Spotify actually represented a countercurrent of this development throughout the 2010s, as the platforms started integrating more and more user-generated content, by gradually lowering the thresholds for uploading amateur music (Eriksson et. al.). The introduction of Spotify Originals (as well as the permitting of "royalty-free content") thus represents a contrary focus where larger, exclusive "Spotify brands" are getting pushed into the foreground, highlighted as premium flagbearers of the platform. In our analysis, this development feature points to the challenges "other, independent content" may face in the years to come, as Spotify will be left with greater profits by promoting and boosting its originals.

When it comes to the second dimension, *legal vs. piracy streaming*, the rise of royalty-free content (and especially the fake artist controversy) provides fertile ground for discussing degrees of legality, on the platform. Whereas the purchase of fake streams, the practice of click farms or other, inexorable manipulation cases constitute explicitly illegal practices, it is imprecise to argue that Spotify's alleged practices of buying out copyrights or hiring music producers should be considered illegal. Preparing for in-house production is, as discussed above, an increasingly common practice across all streaming markets, that – at best – delineate the potential to contest global and powerful production studios and record labels. Looking at the growing presence of royalty-free music and the upheaval of fake artists, however, we believe that several of Spotify's alleged practices must be considered questionable in terms of platform accountability and ethics (Steen). When we consider big tech in general, these tendencies resonate with previous arguments proposed by, e.g. Jakobsson and Stiernstedt or Spilker that portray the mega-ventures of Silicon Valley (Google, YouTube, Meta) as "the real pirates" of the web, which through the pressuring of established media industries to negotiate new copyright agreements, have gained power and legitimacy by "moving the boarders of legality" (Spilker and Colbjørnsen). Spotify is, in turn, known for its motley entry into the music industry, and its once close ties to the illegal file-sharing site Pirate Bay (Fleischer). Altogether, our analysis thus reflects Spilker and Colbjørnsen's conclusion that piracy will, in new and innovative ways, continue to be involved in the shaping of music streaming in the years to come.

Regarding the third dimension, *on-demand vs. live streaming*, Spilker and Colbjørnsen note that, since around 2015, we have seen a "revival" of live modes of distributing and consuming media. Where Spilker and Colbjørnsen link this dimension specifically to TV-streaming (and the discussion surrounding the "death," or rather the "resilience" of linear TV), Spotify is an interesting case as the aforementioned experimentation with live-streaming concerts and the development of discussion applications such as Spotify Live, gradually attracts attention. This trend demonstrates how live streaming possesses key affordances (actuality, presence, sociability) that on-demand streaming strives to outcompete. For Spotify, Spotify Live is now integrated into the platform's main app, coinciding with a steadily rising popularity of live podcasts, whereas the potentials of live-streaming concerts are increasingly linked to (and launched as a possible response to) challenges related to touring and climate-damaging CO_2 emissions, within the live sector of the music industry. In total, these trends thus demonstrate the rising importance of *live*, within contemporary streaming platform strategies.

On the fourth dimension, *niche vs. general audience targeting*, our analysis shows that Spotify – by radically expanding its offerings – is increasingly targeting a wider audience, at the intersection of audio and visually based media. As Spilker and Colbjørnsen denote, there is a general drive for most commercial services to expand and reach as wide an audience as possible over time, in the same way that most services test new features and functionalities – in order to innovate, grow and develop the platform's field of impact. Spotify's point of departure was somewhere in-between the niche and the general: The popular music field is itself made up of a mainstream audience, gathered by a "general" group of people enjoying the big hits of contemporary, Western culture. At the same time, Spotify has over the years turned to a niche in the marketplace dedicated to music and devoted pop-fans (unlike, e.g. YouTube which has operated in several markets simultaneously). By including podcasts, audiobooks, and other audiovisual content, the platform thus targets the sections of the population that do not follow music as closely as the typical Spotify listener – thus entering a more general entertainment market.

Finally, regarding the fifth dimension, *streaming on specialized vs. multi-purpose-platforms*, Spilker and Colbjørnsen describe what they call an "imperative" of successful platforms to (more or less uncritically) add new features and functionalities, over time. For our study, this coincides with Spotify's expansions into the audio(visual) territory. As the platform operates in an exhausted music streaming market, where all the leading players offer (somewhat) the same product, the limits of differentiation have been (to some extent) reached. In a larger platform ecology, one can thus argue that the competitive, industrial divides between different streaming markets (be it music, audio, or visual streaming) are slowly being erased. Today, various platforms, belonging to previously separated cultural domains, are becoming competitors in an increasingly intensified "attention economy," as they gradually operate within the same territories. Meta's recent video-streaming investments, Instagram's explorations of live-streaming events, and Spotify's audio(visual) turn can all be seen as manifestations of this.

Auxiliary Services: The Fourth Phase of Music Streaming

In total, Spotify's audiovisual turn constitutes what we argue is the beginning of the fourth phase of music streaming, or as we call it, *the auxiliary services phase*. As a multipurpose platform, Spotify expands its domain to embrace audiovisual media in general, whereas the act of taking control and exclusive ownership of the content it distributes, forms a key strategy for developing into new territories, innovating new revenue streams, and differentiating its own product from rival platforms. Although we concentrate on the case of Spotify, these developments are also visible among competing services, as well as in the broader ecology of online platforms – be it streaming or social media. While gradually moving into the music streaming market, Apple, Google, Meta, and Amazon are at core multipurpose, whereas niche platforms such as Tidal, Pandora, or Bandcamp are all exploring the potentials of podcasts, spoken word, and audiovisual live streaming. Altogether, these movements account for what we consider to be the developing strategic patterns of platform-based music streaming, answering the first part of our two-folded research question.

Responding to industrial demands for growth (Gillespie, *Custodians*), Spotify's expansions (merging companies, acquiring businesses, buying market shares) illustrate, on the one hand, well-known strategic movements of the platform strategy literature (Parker and Van Alstyne) about innovating and bundling services, approaching new target-groups, while intruding into new markets in order to maintain competitive advantage. Echoing the critical conceptualizations of platform colonialism and power (Van Dijck et al.), Spotify's stated goal of annexing and gaining market and cultural dominance, throughout the space of online audio (and beyond), thus manifests a vision of controlling a larger and more comprehensive domain of online life: *the online audio space*. Spotify's prospects of involving in video-based streaming expands these motives even further. On the other hand, Spotify's recent turn testifies to a company (and an industry) that is in constant motion. As a general feature of the platform ecology, the companies involved are continually forced to look for undiscovered spaces to conquer, for novel ways of generating revenue, and to innovate strategies for attracting users – as their business models are constantly being reinvented (and re-innovated) in order to stimulate growth. For music streaming actors, it is easy to understand why these directions are staked out. We began our article by problematizing the parity of music streaming actors (Hracs and Webster), where the drive to innovate, develop, and locate competitive advantages between the services has constituted a constant challenge, throughout the history of music streaming. From the open-access phase, via social and algorithmic streaming, the auxiliary streaming phase thus constitutes a step further in the ongoing ecology of platform competition.

Our second research question was, however, *What consequences does this turn have for music industry stakeholders*? Our findings indicate that Spotify's expansions pose significant concerns for artists, record labels, and other music rightsholders. Although paving the way for content innovation (e.g. through the inclusion of the live-music sector and the prospects of live-streaming concerts), the ways in which Spotify takes ownership of exclusive content (and thus a greater control over the distributional value chain) raises questions of what role "other, independent" content will play in the future of the platform. The informants' concerns related to biased exposure reflect this, in particular, with the proposed "horror scenario" (and the worry related to how creative production are becoming centrally controlled by a small handful of global tech companies) raising questions about whether alternative content – that does not respond to the dominating platforms' inherent, commercial logics – ends up being deprioritized. Moreover, fake artists and royalty-free content are seen as an additional, growing threat as are exponents with an earning potential located outside of the music industry. Overall, the expansion of Spotify's offerings, in conjunction with ever static subscription fees, is thus considered a threat to the music industry's market share as a whole.

As earlier in the music and media history, new conflicts between the stakeholders involved ascend in the phase of auxiliary streaming. While the representatives of the music industry worry about diminishing market shares, Spotify itself moves into territories populated by new competitors, potentially disrupting the intermediate structure of other neighboring industries (e.g. the radio, film, television, press, or book industries). As a result of Spotify's growing global presence, however, actors of the music industry more specifically depend on being present on the platform, even if declining incomes and failing living conditions (especially for independent actors) seem to characterize everyday life. There may be a hope, however, that the streaming industry's lack of sustainable distribution offers could open new possibilities for dedicated niche platforms, with a greater economic and editorial focus on music, filling in a seemingly abandoned position in the music world: the dedicated space for online music.

The contribution of this article has been to scrutinize critically the strategic developments of the streaming platform Spotify, and to identify the consequences these developments pose for the stakeholders involved (particularly emphasizing actors of the music industry). An important task for further research will thus be to trace the ways in which these consequences materialize: What role will music actually play in the future of Spotify? Moreover, there will be a need to study how streaming platforms (and more generally, the music industry) will adapt to new trends in online content distribution, of which new sets of logics (such as in the rapidly evolving Web 3.0) could be replacing the platform as the bearing infrastructure of online life. However, what seems certain is that the ever-changing dynamics of streaming and online content distribution will continue to bring headaches and sleepless nights for the parties involved. So, to paraphrase the old hit of the Beastie Boys, for the music industry, there will be no sleep till Stockholm. Or beyond.

Notes

1. The theoretical framework (the *phases* and *dimensions* of music streaming) follows two studies recently provided by Hendrik Spilker, one of this article's coauthors (Maasø and Spilker; Spilker and Colbjørnsen).
2. Spotify has made several moves toward the audiobook market, including a propositioned collaboration with the Swedish audiobook service Storytel and through the launching of various exclusive re-readings of literary classics such as *Frankenstein, Harry Potter*, etc. (Spotify, "Stars").
3. Spotify has also promoted a number of original music recordings through "Spotify studios," resulting in different, exclusive music series produced by in-house-producers (e.g. "Spotify Singles," "Studio It's Hits," "Studio Oysters," etc.) (Spotify, "Spotify Singles").
4. Here, we use the term "independent" to denote all content that is not owned or covered under exclusive agreements with Spotify.
5. Reportedly, Spotify Originals account for 6 of the 10 most streamed podcasts on Spotify (Spotify, "Spotify Shares").
6. A debate on copyright in AI-generated music is gradually developing, as this music is largely dependent on input from existing, human-made music.
7. Additionally, Spotify sells music exposure. Rightsholders are now able to both buy pop-up ads on the platform (to promote new releases), and to waive off royalties in exchange for exposure on Spotify playlists (Ebbesen). Such practices can be compared to previous gray-zone violations riding the industry, such as payola (referring to the illegal practice of record companies bribing radio stations to play their music).

8. For example, the collaboration with Chernin involves producing TV adaptations of Spotify Originals. This agreement includes 250 Spotify Original podcasts to be further developed in collaboration with players such as Pineapple Media, Amazon, and HBO (Spotify, "Spotify and Chernin").
9. In our data, Spotify's ongoing conflict with Apple is significantly covered, revolving around Apple's demands of a tax from Spotify, as the Spotify app is made available through Apple's app store (Spotify, "Consumers").

Acknowledgments

This article is part of a PhD project, funded by Kristiania University College in association with the University of Bergen. The qualitative interviews were conducted as a part of the research project "Streaming the Culture Industries (STREAM)" at the University of Oslo, funded by the Research Council of Norway (grant number 263076). The authors wish to thank the STREAM project group, and all the informants involved, for a valuable collaboration. They also want to thank the anonymous reviewers and editors, as well as Ole Johan Mjøs and Lene Pettersen, for much appreciated comments throughout the writing process.

Disclosure Statement

The authors declare that they have no known competing financial interests or personal relationships that could have appeared to influence the work reported in this paper.

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