

Sociological and Cultural Aspects of New Economic Models In Digital Music in Turkey

Türkiye'de Dijital Müzikteki Yeni Ekonomik Modellerin Sosyolojik ve Kültürel Yönleri

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Abstract

This research explained new economic models in the digital music industry in view of cultural, technological, and sociological aspects. The importance of local entrepreneurship, as well as global markets, were accessed. There have been many developments in digital music in the past two decades. These developments have affected relations between the digital economy and music technology. The study is mainly focused on the Turkish music market. Why the subscription and bundling models are on the rise? How does an economic merger between telecommunication companies and digital music services work? What are the effects of the recent developments in technology, in particular smartphones on music industry? The partnership of Turkcell, the largest GSM operator in Turkey, and one of the top 5 in Europe and Turkish digital music service Fizy was exemplified. Thus, the significance of local markets in the digital era, expectations of the audiences, the applicability of streaming, and bundling economic models in Turkey have been examined.

Keywords: Digital Economy, Music Industry, Technology, Streaming, Bundling, Locality.

Özgün Araştırma Makalesi (Original Research Article)

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Öz

Bu araştırma, dijital müzik endüstrisindeki yeni ekonomik modelleri kültürel, teknolojik ve sosyolojik açılardan açıklamaktadır. Küresel pazarların yanı sıra yerel girişimciliğin önemi de incelenmiştir. Son yirmi yılda, dijital müzikte birçok gelişme olmuştur. Bu gelişmeler dijital ekonomi ve müzik teknolojisi arasındaki ilişkileri etkilemiştir. Çalışma ağırlıklı olarak Türkiye'deki müzik piyasasına odaklanmıştır. Abonelik ve paket satış modelleri neden artmaktadır? Telekomünikasyon şirketleri ile dijital müzik hizmetleri arasındaki ekonomik birleşme nasıl işler? Başta akıllı telefonlar olmak üzere, teknolojiye son gelişmelerin müzik sektörüne etkileri nelerdir? Makalede, Türkiye'nin en büyük GSM operatörü ve Avrupa'nın ilk 5'inden biri olan Turkcell ile Türk dijital müzik servisi Fizy'nin ortaklığı örneklendirilmiştir. Böylece dijital çağda yerel pazarların önemi, izleyicilerin beklentileri, stream'in uygulanabilirliği ve Türkiye'de paket satış ekonomik modelleri incelenmiştir.

Anahtar Kelimeler: Dijital Ekonomi, Müzik Endüstrisi, Teknoloji, Stream, Paket Satış, Yerellik.

Introduction

The recorded music industry has always found different ways of delivering music to the audience. Barrow and Newby explain different actors in music industry.¹ The technological journey that began with vinyl and gramophone continued with media such as radio, TV, cassette and CD. Millard examines American recorded music history and Gronow and Saunio Patmore also investigate the technological developments in the music industry.² The studies of Gordon, Hill and Hutchison are accepted

¹ Tony Barrow and Julian Newby, *Inside the Music Business* (New York: Routledge, 1994).

² Andre Millard, *America on Record: A History of Recorded Sound* (Cambridge: Cambridge University Press, 2005); Pekka Gronow and Ilpo Saunio, *An International History of the Recording Industry* (London: Cassell, 1999); David Patmore, "Selling Sounds: Recordings and the record business," *The Cambridge Companion to Recorded Music*, Ed. Nicholas Cook, Eric Clarke, Daniel Leech-Wilkinson, John Rink (Cambridge: Cambridge University Press, 2009).

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relatively the first researches in digital music world and new media marketing.³

Digital audio files which have taken the place of these physical forms, have also led to the development of a new digital economy while being produced as new information technology. Burkart describes the archiving of music with digital dissatisfaction principle.⁴ Jones explains digital music through audiences, industry, and musicians.⁵ Tscmuck approaches the feature of innovation of digital music.⁶

The definition of digital music, that we are familiar with today is pretty much different than the one two decades ago. However, as a creative industry, music has had some problems in adapting the digital economy, especially during its first years. "A better case for supporting artistic and creative activities may arise from a better understanding of the relationship between information, knowledge, and creativity, and how sustained technological and economic innovation are accompanied by social, cultural and institutional innovation and the existence of cultural formations that promote innovation and risk-taking."⁷

Music industry literature has countless sources about reductions in the sales of physical forms, lawsuits between record companies, musicians and illegal music services, finally a legal era in which a new download model started with iTunes. However, this research focuses more on the adaptation

³ Steve Gordon, *The Future of the Music Business* (San Francisco: Backbeat Books, 2005); Brad Hill, *The Digital Songstream: Mastering the World of Digital Music* (New York: Routledge, 2003); Tom Hutchison, *Web Marketing for the Music Business* (U.S.A: Elsevier, 2008).

⁴ Patrick Burkart, *Music and Cyberliberties* (Middletown: Wesleyan University Press, 2010).

⁵ Steve Jones, "Music and the Internet," *The Handbook of Internet Studies*, Ed. Mia Consalvo and Charles Ess (UK: Blackwell Publishing, 2011).

⁶ Peter Tscmuck, *Creativity and Innovation in the Music Industry* (Vienna: Springer, 2012).

⁷ Terry Flew, "Beyond and hocery: defining creative industries" (The Second International Conference on Cultural Policy Research, Wellington, New Zealand, 23-26 January 2002).

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process after 2007 rather than on the process of struggle between 1997-2007. In the last decade, the music industry accepts technological transformation. It becomes an actor in the digital economy and creates sources of income. On the other side, there has been integrations between technology, science and society in different sectors including creative art, digital music and entertainment industry. Baron and Gomes indicates that “During the last two decades, several studies that analyze the social and technological relationships between Information and Communication Technologies (ICT) and collective action have shown that ICT changed not only the ways in which activists communicate, collaborate and demonstrate but have also impacted political processes and civic engagement.”⁸ Technological developments have affected the sociological and cultural phenomenon in a society and they have also been affected by them. Castells explains this situation with the term ‘new society’ and investigate the essence of the newness and emergence of new culture.⁹

In music business, especially after the illegal process, the audiences were directed to the downloading model and then to the streaming model. The researches about personal playlists of Hagen, Spotify and on-demand streaming of Marshall, streaming and music production of Hiller and Walter are some of the recent studies in the field.¹⁰

Streaming model presents a demonstration in the music economy with free and premium options. Thomes explains the differences between

⁸ Luis Fernando Baron and Ricardo Gomez, “The Associations between Technologies and Society: The Utility of Actor- Network Theory” *Science, Technology & Society* 2, No.2 (2016): 129–148.

⁹ Manuel Castells, *End of Millennium* (Chichester: Blackwell Publishers, 2010).

¹⁰ Anja Nuylund Hagen, “The playlist experience: Personal playlists in music streaming services,” *Popular Music and Society* 28/5: 625-645; Lee Marshall, “Let’s keep music special. F- Spotify’: on-demand streaming and the controversy over artist royalties,” *Creative Industries Journal* 8, No. 2: 177-189; R. Scott Hiller and Jason Walter, “The rise of streaming music and implications for productions,” *Review of Network Economics* 16, No. 4: 351-385.

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download and streaming models in terms of revenues and also compare the quality of advertising supported service and premium service and also user's attitude.¹¹ Music ownership as an attitude has been investigated in Danckwerts and Kenning's study. They asked, "what the antecedents of psychological ownership (of both the service and the music) in music streaming consumption are and whether service-based psychological ownership affect music-based psychological ownership."¹² Prey approaches the music services with the idea of 'ways of seeing' and 'algorithmic individuation' with using Gilbert Simendon's individuation theory.¹³ In another paper, Prey investigates curatorial power in platforms and "who playlists work for."¹⁴

This research refers to the importance of culture, consumer habits, music taste and importance of local markets in the digital music industry regarding as streaming music literature. At the same time, it accepts the concept of a global, standardized social music audience as a concept. Technological innovations should be considered together with economic and cultural contexts. Is it adequate for global companies to have local repertoire in order to do business in local markets?

Methodology

In this paper, literature review, qualitative data and content analysis were used. After literature review, International Federation of Phonographic

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¹¹ Tim Paul Thomes, "An Economic Analysis of Online Streaming Music Services," *Information Economics and Policy* 25, No. 2 (2013): 81-91.

¹² Sebastian Danckwerts and Peter Kenning, "It's MY Service, It's MY Music." The Role of Psychological Ownership in Music Streaming Consumption," *Psychology of Marketing* 36, No. 9 (2019): 803-816.

¹³ Robert Prey, "Nothing Personal: algorithmic individuation on music streaming platforms," *Media, Culture and Society* 40, No. 7 (2017): 1086-1100.

¹⁴ Robert Prey, Locating Power in Platformization: Music Streaming Playlists and Curatorial Power," *Social Media+ Society* 6, No.2 (2020): 1-11.

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Industry (IFPI) 2007-2021 Reports, Building the New Business Case for Bundled Music Services Report conducted by MIDIA, We Are Social 2016 Report, Global Mobile User Survey made by Deloitte, Digital Economy Outlook 2015 prepared by OECD, Smartphone Ownership and Internet Usage Report organized by Pew Research Centre and Youth and Music Research Reports prepared by Turkish Digital Music Platform Motto Music have been analyzed in detail.

We made semi-structured interviews with three directors from the Marketing and IT Departments of Fizy Digital Music Company. The media archives of the interviews of the executives of global and local digital music entrepreneurs have been gathered and compared the contents in the view of sociological aspects. Spotify, as a global example and Fizy as a local example were analyzed through the study. Their PC and smartphone applications, interfaces, sound qualities, the content of playlists, and home page banners were investigated. One of the authors of this paper made participant observations with using free and premium versions of YouTube, Fizy and Spotify digital music platforms and Turkcell as a telecom during the literature research and writing processes.

Technology as an Actor of New Economy

“There is another layer that is folded in production/consumption, experience, power, and culture. This is technology. By technology, I mean the use of scientific knowledge to specify ways of doing things in a reproducible manner.”¹⁵ Castells’ technology description focuses on production, consumption, experience, power and culture. This research also accepts on importance of these features and approaches new digital music economy models that are under the influence of technological developments.

¹⁵ Manuel Castells, “Materials for an Exploratory Theory of the Network Society” *The British Journal of Sociology* 51, No.1 (2008): 5-24; 8.

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Musicians benefit from technological means not only in producing their music but also in publishing and promoting their works. Thanks to technology these works can be shared with the audiences on social networking sites and reach to the millions all around the world within a second. Therefore, a new form of production for the musician, and a different form of consumption for the audience occurs. Besides, the habits of listening, archiving, and sharing the music of the audience have been changed. These changes mean new experiences for musicians, audiences, and music companies in the digital age. On the other hand, the recent technological developments started to reshape the regional and global markets, those who adapt themselves to the changes in the fastest way become stronger in the market. The speed of technological adaptation has become the key element in gaining strength in the music industry.

In the digital age, being in the network and connected is more important than before. According to the newest data, 59% of the world's population uses the internet.¹⁶ The number of smartphone users is 3.5 billion in 2020. The idea of establishing a network, joining a network, and providing economic benefits through networks is not new. What is new is how to do business and reach the user in such a big social network in the technology age. "These technologies allow for coordination and management of complexity, in an interactive system which features feedback effects, and communication patterns from anywhere to everywhere within the networks."¹⁷ Thanks to the technology that erases physical borders, localization is becoming increasingly important. Additionally, global brands that aim to achieve economic success in local markets, should definitely take into account the cultural, economic, and social characteristics of the geography.

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¹⁶ Global digital population as of April 2020, <https://www.statista.com/statistics/617136/digital-population-worldwide/>

¹⁷ Manuel Castells, "Materials for an exploratory theory of the network society," 8.

Music Industry and Economic Models in Digital Age

Music files were freely transferred between the networks by the users after the digital music revolution. Therefore, the audience have a larger digital music archive than they have ever had before. As physical sales decreased suddenly, the legal struggle between music companies, musicians, and music services began. The situation can be summed up as an industry trying to adopt the new technology, musicians trying to exist in the new digital economy, and an audience whose consumption habits change.

Frances Moore, IFPI general manager, says, “The music industry has adapted to the internet world, learned how to meet the needs of consumers and monetized the digital marketplace.”¹⁸ She also approaches the future of the music economy positively and says that the music industry is driving the digital economy. The industry has begun to build a digital economy system with an advanced legal infrastructure. However, many audiences still reach music through illegal ways. Furthermore, there are still problems with payments made to stakeholders. Nevertheless, still, lots of legal practices have been introduced since the digital music revolution at the end of the 1990s. As the industry adapts to technology, it has developed new economic models and increased its incomes. The music economy is in cooperation with a multitude of stakeholders, including record labels, musicians and audience, as well as technology companies, music services, telecoms, social networking sites, and professional associations. “The new business model implies dramatic changes in the distribution and consumption of music, and also affects how revenues are distributed among stakeholders.”¹⁹

¹⁸ “Engine of a Digital World,” IFPI, accessed March 2017, http://www.ifpi.org/downloads/dmr2013-full-report_english.pdf

¹⁹ Sigbjørn Hjelmbrække, “Economic concepts and implications of music subscriptions” (18th International Conference on Cultural Economics, Montreal, Canada, 25- 27 June

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One of the most critical developments in the digital music economy is the introduction of the Apple technology company and, therefore, iTunes's music industry. iTunes has legally introduced a new model for the music economy by offering music downloads. With the iPod in 2001 and iTunes in 2003, Apple has been the leader for digital music for many years. For audiences who are accustomed to listening to free music, the newly produced economic models need to be useful. Apple's founder, S. Jobs, has interacted with music companies and offered them an economic partnership.

Phases of Digital Music Economy

“The a-la-carte legal download revenue model pioneered by Apple at the start of the digital revolution arguably drove consumers to devalue the legal music content.”²⁰ It can be considered the legal download model provided by iTunes as the first phase of the digital music economy.

The digital economy, while refreshing its tools, also takes into account consumer demands and evolves towards more comfortable, more accessible, and trendier. The subscription model is the second phase of the digital music economy. At this stage, the audience can reach music free of charge, but the system allows stakeholders to monetize through advertising revenues. Alternatively, audiences can subscribe to music services on a monthly and paid basis and download limited numbers of songs without being exposed to any advertisements.

The third stage consists of access instead of ownership, switching from free membership to Premium membership, which includes the growing significance of a list in music services and partnerships between telecoms and digital music services.

2014).

²⁰ Jordan R. Gamble, Michael Brennan, and Rodney McAdam, “A rewarding experience? Exploring how crowdfunding is affecting music industry business models” *Journal of Business Research* 70, No.3, 25-36.

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Streaming music files are audio recordings that are taken instantly and continuously from the source and presented to the audience.²¹ Streaming is one of the most important income sources of the digital music economy, today. The audience prefers to listen instead of downloading music. At this point, consumer habits should be analyzed deeply. Besides, it is also significant to mention the importance of being in the digital market for the singers and producers, because the number of clicks, downloads and/or purchases are the most accurate indicator of success. In the early years of the digital music revolution, audiences have downloaded too many music files. For this reason, it may be thought that the audiences have fulfilled their need for owning music.

On the other hand, production has increased in the world of entertainment and music, where consumption has also increased. On the other hand, while there had been an increase in the production in both entertainment and music industries, the demand also increased simultaneously. Musicians often release singles to the market instead of albums. The audience tries to keep up with these rapid changes. New singles and albums are uploaded to digital music services every day. In this case, the audience does not need to have that music, since the list of digital music services responds fully to this demand. According to the Marketing Manager of Fizy, “People do not search and play anymore, they do not seek for a singer and listen to his/her songs. They listen to the lists they happen to see on the home page. The audience do not choose their mood; they listen to whatever we put on the display window.”²² (Interviewer 1, 2017)

There are two types of memberships in the subscription model. In

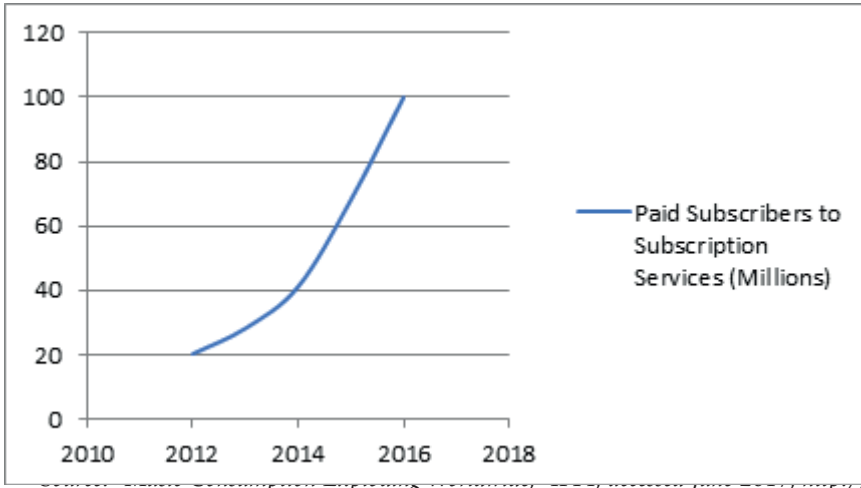
²¹ Tuğba Aydın Öztürk, “Adaptation Strategies of Musicians between the Audience Expectations and Culture Industry in terms of New Media” (PhD thesis, Istanbul Technical University, 2015), 251.

²² An in-depth interview was held with the employees of the related department in 2017.

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free membership, the audience listens or watches ads between songs. In premium membership, they make monthly payments, do not have to listen to advertisements, and benefit from other services of the music platforms. In recent years, the number of audiences has increased in Premium memberships. Subscription revenues increased by 39% in 2015 compared to 2014 data. It is a meaningful step that the audience is willing to pay for music again.

Table 1: Paid Subscribers to Subscription Services (Millions)



www.ifpi.org/downloads/GMR2016.pdf

Premium membership has increased, and partnerships that music services have made with telecommunication companies affected the sales. Smartphone users buy packages from GSM operators, and the companies offer different alternatives besides features such as extra data, minutes, and SMS. These packages often include the use of digital music services. A smartphone is also a music listening device. “Digital music has made a

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rapid transition from being consumed on fixed-line desktop computers to being consumed wirelessly on smartphones and tablet devices. Record companies now make money from music consumption in ways that were not possible a few years ago.”²³

The third stage of the digital music economy includes all-access features. The audience wants to reach millions of different music everywhere and anytime. Thanks to the advances in technology and internet services, millions of smartphone users worldwide become potential music consumers. This feature opens a new page in the digital music economy. The music industry and the mobile industry partnership is not new. According to IFPI 2008 Report; “By the end of 2007, a new subscription model based on the concept of bundling music with other services and devices emerged - this could be an Internet Service Provider (ISP) subscription, mobile phone, or a portable playback device. Under this model, music is free of charge, but record companies and artists get paid through the sale of services or devices.”

In recent years, music services and partnerships with GSM operators have become one of the most important locomotives of the digital music economy, both in global and local markets²⁴. Below, subscription, streaming, and bundling concepts will be analyzed in detail.

Subscription Services and Bundling in Music Business

2009 digital music industry report indicates that partnerships between technology companies and the music world will be an indispensable part of the future of the music economy. “Subscription services are the fastest-growing element of digital music in 2012 with 44% growth of subscribers in 1 year and 59% growth of revenue in the first half of 2012.” The reason

²³ “Lighting Up New Markets,” IFPI, 2014, <http://www.ifpi.org/downloads/Digital-Music-Report-2014.pdf>

²⁴ This information based on observation and analysis of one of the author’s.

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for this economic growth is successful package deals with ISP and mobile operators, improved user experience, integration with social networks, and the increase in price levels.²⁵

Music companies reach broader networks through partnerships with technology companies, mobile operators and mobile phone manufacturers. On the other hand, users who buy GSM packages also pay attention to content. For example, according to Fیزی IT manager, “It’s no longer enough to give additional SMS or internet data to subscribers. The right to use Fیزی freely, TV, and many other gifts are also deemed necessary in order to withdraw the attention of potential customers.”

In the bundling economy model, a GSM operator makes a partnership contract with a digital music service. The operator provides a platform for music service. However, the preliminary examples of this practice were different. Mobile phone manufacturers offered unlimited music access to their users, and, in a way, this model has been effective in shifting from the music ownership model to the streaming system. For example, Sony Ericson improved its music access model by allowing users to download, play, and recommend music directly via mobile networks wherever they are.”²⁶ This service is music subscriptions bundled with the devices.

Then, eventually ISP and mobile partnerships started to grow. These partnerships have high economic values for both music and mobile companies. IFPI 2010 Report says that “Music and other entertainment content help ISPs reduce their losses and retain their customers to earn new revenues.” ITDC in Denmark, Neuf Cegetel and SFR in France, TeliaSonera in Sweden, and Terra Networks in Brazil can be given examples. Unlike these initiatives, Vodafone launches an unlimited music

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²⁵ “Engine of a Digital World,” IFPI, 2013, http://www.ifpi.org/downloads/dmr2013-full-report_english.pdf

²⁶ “New Business Models for Changing Environment,” accessed 10 April 2017, <http://www.ifpi.org/content/library/DMR2009.pdf>

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subscription bundled with the general mobile service.

Telecommunication companies, digital music services and record labels also use the brand value of each other when they make partnerships, and they create new social networks for their users. Companies try to offer the right product to keep their existing customers and to attract the potential ones, to the maximum extend. Because the success of sales and marketing strategies totally depend on finding out the best options to match the customer needs and expectations, in this highly competitive market.

The most important feature of digital technologies is mobility. The audience can access the music at any time and any place. Moreover, they reach millions of songs offered by music services via mobile devices. This leads us to reveal one of the most critical questions of this research: Why is the subscription model trendy in the music economy?

Why the Subscription and Bundling Models are on the Rise?

Subscription revenues have increased six times and reached \$ 1.6 million since 2010. This means 23% of all digital revenue. There are many reasons why digital music services and subscription models are preferred. “Better technology infrastructure, higher smartphone penetration, lower prices for devices, more storage space to store tracks for offline users and improved car integration.”²⁷

The most important reason why both the subscription and bundling model is preferred by audiences, record companies, and digital music services is the increase in smartphone usage. According to the consumer survey conducted by Ipsos MediaCT; Smartphones are the 3rd popular device for listening to music. Smartphones come after computer/laptop and hi-fi music systems. It is important to note that smartphones are used

²⁷ “Charting the Path to Sustainable Growth,” accessed 15 June 2017, <http://www.ifpi.org/downloads/Digital-Music-Report-2015.pdf>

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more than mp3 players for listening to music. Digital music service Deezer notes that 60% of new subscriptions take place via mobile phones. Fızy broadcasts live concerts in the application and 95% of the audience listens to these concerts on their smartphones.

Smartphones provide the appropriate technical environment for the subscription model to succeed. The audience also cares about better sound quality, convenient access to music, and ease of use. Improvements in technical and technological infrastructures during the last few years increased the quality of sound and speed. At the same time, the audience can benefit from music services in which they can access millions of songs with a click.

New economic models do not only affect audiences. The bundling economy also transforms record labels, music services, and telecommunication companies. MIDIA's report mainly mentions why this model has succeeded:

- Technology is ready,
- Streaming is the future of digital music,
- Streaming services and telcos are strong complements,
- Telcos can subsidize price,
- Streaming enables telcos to become top tier players,
- Streaming is a better financial model.²⁸

In ad-supported apps, the audience does not pay anything, but stakeholders can still make money. In the case of packages offered by mobile operators, the user makes a payment for all products from the very beginning. That is why users think they are not paying extra for music. Due to these reasons, subscription and bundling models reach more users day by day.

²⁸ "New Report: Building the New Business Case for Bundled Music Services," accessed 4 April 2020, <https://musicindustryblog.wordpress.com/2013/10/11/new-report-building-the-new-business-case-for-bundled-music-services/>

Economic Aspect of Subscription Model

Audiences do not pay for accessing to a single track or album, they can already reach entire repertory. One of the essential advantages of this economic model is that it provides full access to the archive. For the audience, it has been a more useful system than paying for single or albums separately. Besides downloading or listening to single or album, services such as radio, video, lists, and live concerts offer diversity for the users.

Digital music services have established partnerships with ISPs and mobile operators in global and local markets, and these partnerships have economic value for both the music industry and GSM companies. Mobile operators, as investors, rely on music services that have millions of users all around the world. “These deals offer Telecom companies the opportunity to sell higher value packages to their users, reduce customer loss, and associate their brands with music. Subscription services, on the other hand, benefit from marketing power, billing engagement and a larger user base that Telecom has.”²⁹

Although these models have many advantages, some issues are still evolving. Since the system is relatively new, there are also criticisms about the future of the system. “The economic sustainability of the subscription streaming model is also debated. The services are not yet safely established, and it remains to be seen if they are profitable and sustainable” (economically viable and sustainable in the long term).³⁰ It is not clear how the revenues are paid to musicians and record labels by telecoms. Music companies are not told how much listening is done per artist. They are paid according to the total number of listening of all artists. There are so many unresolved issues and uncertain areas that needs to be re-addressed. In this respect, the system is still developing.

²⁹ “Engine of a Digital World,” IFPI.

³⁰ Sigbjørn Hjelmbrække, “Economic concepts and implications of music subscriptions.”

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Consumption and Social Music Audiences in New Music Economy

We need to define the *digital age consumer* to understand the digital music economy and new models. Are the masses of Palfrey and Gasser named 'digital natives' able to explain today's audience profile? "They were all born after 1980, when social, digital technologies, such as Usenet and bulletin board systems, came online. They all have access to networked digital technologies. Moreover, they all have the skills to use those technologies."³¹

It is a fact that the younger generation is more likely to adapt to the new technologies. A survey called "The State of the Streaming Music, Most Music Lovers, is Embracing Online Services" was answered by 700 participants in America in 2012. According to the survey, only about 3% of participants between the ages of 18 and 29 did not listen to any digital music service before. According to IFPI 2014 Report, for participants over 30 years of age, this rate increases to 42%. "Property-based downloads and CDs are more common among older consumers." The choice of music listening device is a matter of consumption habits. Besides, adolescents and young adults are significant actors for consumption in general and they tend to purchase from digital marketing platforms. They mostly compare the products, read/ make comments and choose cheaper options. These consumption habits can be evaluated as participatory culture. Both young people can be target and sources at the same time in digital era. Kuyucu conducted a survey with more than 2000 university students in Turkey to analyze their listening habits and the research presents that 62.86% of the students use Premium online music services and these are YouTube

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³¹ John Palfrey and Urs Gasser, *Born Digital: Understanding the First Generation of Digital Natives*. (New York: Basic Books., 2008).

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(37.23%), Spotify (29.79 %), Apple Music (15.96 %) and Fizy (8.51 %). 100% of them use their smartphone as a music listening tool.³²

Young generation is not only a good sample for understanding digital music usage, but also digital consumption generally. According to Ozturk's 'Second Wave Coronavirus in Turkey Survey,' digital purchasing and online shopping have increased and reached 60% after pandemic in young generation.³³ They stated that they've consumed different products such as coffee/ tea, junk food or personal care products and have spent more time in social media and online video games during this period.

Music services and technology companies do a lot of marketing work to attract the attention of the audience in the digital era. Curation is one of the most critical issues of music services. The curation team working on digital music services create playlists by genre. They also make recommendations according to the possible music taste of the listeners and offer options with the 'explore' feature. However, the issue of curation is much more important in local music markets. Especially in the local area, it is necessary to get to know the music identity of the markets and the trends and the preference of the audience.

The desire to discover new music and a new musician has always been a powerful motivation since the music industry's early days. The audience used to discover new music from various traditional mass media such as TV and radio. The only thing that never changes in the music world is the aspiration towards new singers and songs. Music services share new music and musicians every day. However, the essence of the desire to discover is the consumption habits. The research called "Consumer's Preference

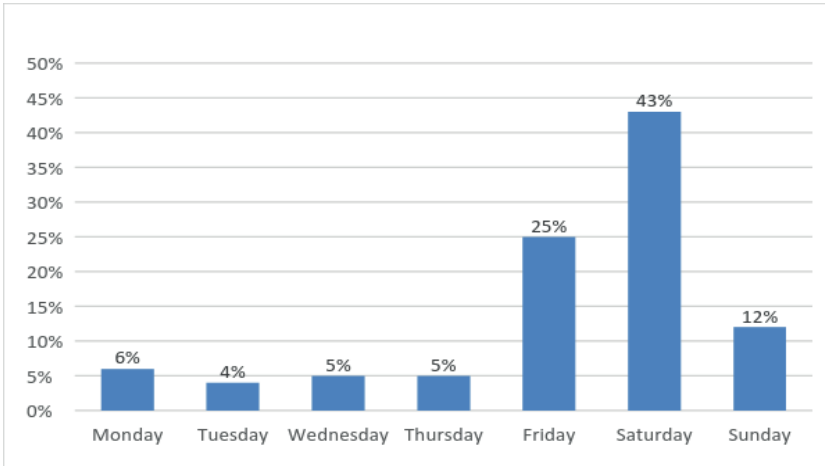
³² "Young People in Turkey Listen to Music on Digital Music Platforms," accessed April 2021, <https://www.tgrthaber.com.tr/kultur-sanat/turkiyede-gencler-muzigi-dijital-muzik-platformlarindan-dinliyor-2640800>

³³ "Second Wave Coronavirus Research in Turkey," accessed February 2021, <https://www.youtube.com/watch?v=5hqVdFos7ZQ>

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for New Music Release Days” by IFPI supports this argument. Audiences’ new music discovery days are mostly Friday, Saturday, and Sunday. These are the days they consume more. Music consumption habits do not conflict with general consumption habits.

Table 2: New Music Discovery Rate



IFPI 2016 Report: New Music Discovery Rate

In the digital age, the audience becomes a social music audience. For instance, Spotify has become a recreational channel where users can spend 24 hours a day. Music services add features like radio, podcasts, video, and concert. Deezer likewise added 20 thousand podcasts and radio shows to the platform. According to Kara’s report, Spotify has broadcasted 25 million hours of music listening experience. As a result, audiences are not much concerned with music genres. “Spotify, which has become a service that adapts to daily activities, will be more closely related to your music listening history, location and personal information.” Personal information and audience habits are recorded, the consumer’s data history is stored

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and this information is used to promote and sell personal items in the digital era.

Case Study of Turkcell- Fizy in Turkey

GSM mobile communication started with Turkcell in Turkey in 1994. The company, which is the largest GSM operator in Turkey, also serves in the Turkish Republic of Northern Cyprus, Azerbaijan, Kazakhstan, Moldova, Georgia, Ukraine, Belarus and Germany. Turkcell has become the most preferred mobile operator, with 36,7 million users in Turkey.

Fizy, founded as a search engine in 2008, achieved to attract attention of millions in a very short time. According to the company's founder, E. Yaris, the application was successful because it was simple, without advertising and unnecessary membership processes. The New York Times commented 'better than MTV Music' for Fizy and presented it as one of the three music services to be tried out in 2009. Fizy wins the 'Best Music Service' award at the 2011 Mashable Awards. The service, which provided access to 75 billion MP3s and served 30 languages, received 750 thousand visits a day.

In these years, there were news about Fizy's success in the world in Turkish media. However, later on, the application was closed with a court decision because of infringement of copyrights. Other music services in the world are still facing conflicts with the record companies and professional associations as they have experienced in the early beginning.

Fizy was purchased by Turkcell in 2011 and has been managed by Turkcell since 2012. Meanwhile, Turkcell has provided digital music service to its users for a long time under the name of Turkcell Music. Turkcell did not use Fizy until 2015. However, the name of the Turkcell Music brand has changed into Fizy since April 2016. Fizy marketing manager explained the reason: "With this move, we have targeted increasing the company's value, growing target audience, freer communication, more compatible

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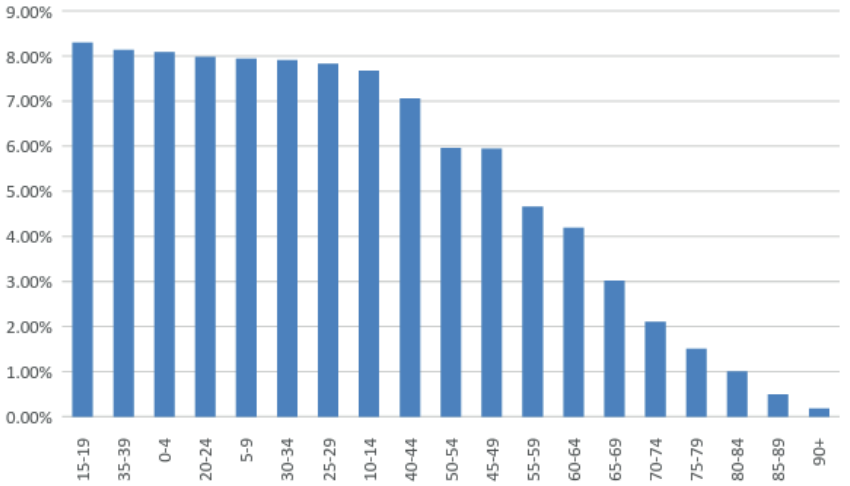
brand identity with music. For these reasons, we have decided to continue with the brand Fizy.”

Fizy serves as a local company in Turkey. In addition to local initiatives, global brands such as Spotify are also in Turkish music market. Spotify has made a bundling agreement with Vodafone in different countries around the world. Turkey has been the sixth country where Spotify and Vodafone have partnered together. Spotify Turkey Manager comments; “Turkey is a strategic and important country for us because of its young and dynamic population of 78 million as well as its penetration in terms of internet usage and social content. Turkish society is quite open to innovation in the general sense.”

Turkey is a country with a young population and a widespread use of technology. Population distribution by age groups in Turkey can be seen below.

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Table 3: Age Distribution (As of 2016)

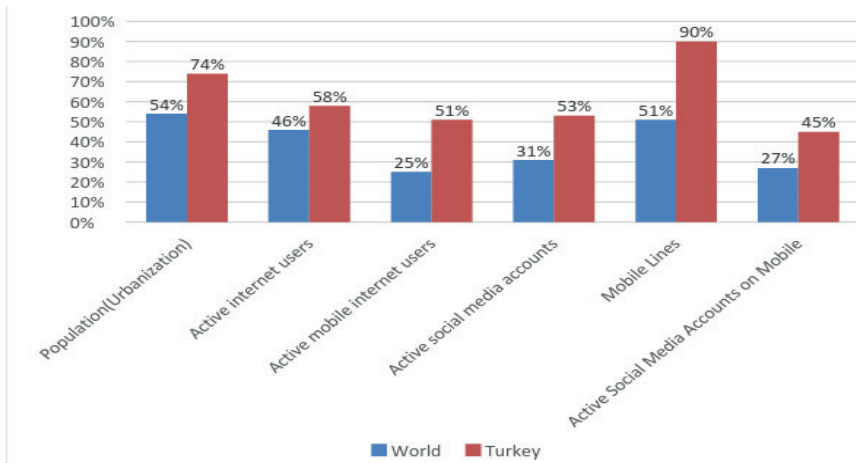


Source: *Tuik 2016 Report: Age Distribution in Turkey*

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The research of 'We Are Social 2016' provides information on the use of technology across the globe. There are many data about usage of the internet, social media through smartphones in the report. Below, the average of the world and Turkey are compared. When examining the data, it can be seen that technology usage is quite high in Turkey.

Table 4: Penetrations

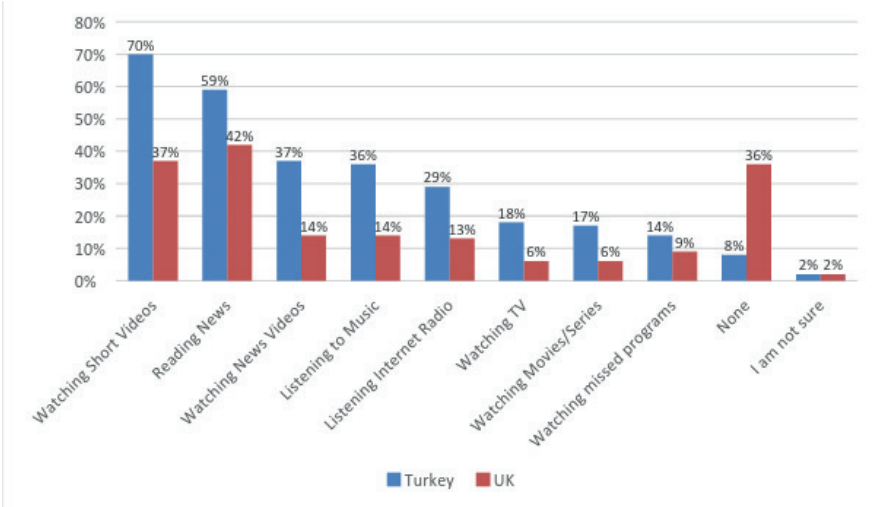


We Are Social 2016 Report: The Technology Usage in Turkey and the World

In the Digital Economy Outlook 2015 report made by the OECD, Turkey is the second country of the whole world using smartphones, connecting internet and usage of social media. Turkey has a high potential for mobile applications. According to Deloitte Report, users in Turkey are more likely to consume rich content, such as video and music, with their smartphones. 49.000 participants join to this research from 30 countries. Participants are asked why they use their smartphones. The results of the interview made in the UK and Turkey are compared below.

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Table 5: What do you use your smartphone for



Source: *Smartphone Usage in Turkey and UK (Mobile Consumer Survey of Deloitte, 2015)*

Turkish digital music market has significant potential for global or local digital music services. When the data in Table 5 is analyzed, this potential can be seen easily in the user’s interests. On the other hand, 70% of the users say that they watch videos from their smartphones. YouTube is a leading video website, and it has created a user habit in Turkey. Most sharing in social media is also visual content such as photos or videos. Therefore, digital music services add short videos, news, and entertainment content or podcasts to their platform. Users in the digital age prefer multiple models. In countries like Turkey, which use intense technology, these multiple features are getting crucial. According to Turkish Statistical Institute’s survey; “Internet usage among Turks aged between 16 and 74 rose to 79% in 2020 from 75.3% the previous year.” Online shopping also on the rise and 36.5% of internet users went online to buy goods or services versus

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34.1% a year earlier.”³⁴ The bundling model in Turkey has a future in terms of economic opportunity because of this high ratio of technology usage in society. Local or global digital music companies in Turkey should address the following features to attract the attention of audiences;

- Good sound quality and speed,
- Local and foreign music repertoire,
- User-friendly applications, ease of use
- Free data usage and offline features,
- Offering rich contents such as video, news, entertainment, concerts,
- Attractive GSM packages prepared for invoiced or unpaid tariffs,
- Enhanced recommendation feature,
- Offering personalized lists and frequent updating of lists
- Analysis of audience habits

While global brands do business in local markets, local enterprises struggle to be successful in their markets as well as to expand their business in new countries. Turkcell Music and Fizy indicate that they have the most significant local music catalog as well as the foreign catalog. “In the past few years, the penetration of global players into the Turkish market has increased the competition, and music services have led to new quests to differentiate.” iTunes has entered the Turkish market in 2012, while Spotify and Deezer entered in 2013. After these dates, competition in the market has increased.

Fizy was a successful application in the world music market in its early years. For this reason, Turkcell, as an investment company, has relied on Fizy. In the bundling model, investor’s confidence is a fundamental issue. The audience will combine two different brands. Turkcell’s awareness in the mobile world is an essential criterion for the audience. According to Fizy, “There are also certain difficulties in doing business in the music

³⁴ Daily News, “Internet usage in Turkey rises to 79 percent,” <https://www.hurriyetdailynews.com/internet-usage-in-turkey-rises-to-79-percent-157682>

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sector as an operating company. However, our luck here is the value of Turkcell and Fizy brands and the trust that our users have in these brands.” (Interviewer 3, 2017)

The main reasons for the acceptance of the Turkcell-Fizy convergence are: trust in the brand, free data (offline listening feature), the feeling of enjoying a free music service, and knowing the taste of the Turkish audience. Fizy: “Knowing culture, thinking local is very important. Turkcell and Fizy users represent every region of Turkey including Anatolia” (The definition of Anatolia here is not only the big cities, but also different parts of the country). The issue of locality is also very important for global companies. Deezer’s CEO says, “We care about our service’s cultural harmony in any country.” IFPI 2013 Reports says the German music service Juke’s Ceo likewise comments: “Success in broadcasting service is complicated without proper partnerships, local repertoire, local editorial and local marketing expertise.”

In this case, what are the features of digital music audiences in Turkey? According to the interview results with Fizy, there is an increasing tendency for digital music in Turkey. Audiences prefer to listen Turkish pop music mostly. Digital music audiences want to discover the new. Also, younger users are active in service. Audiences, mostly between the ages of 25-34, are using the service between 18.00-19.00 hours. This information shows that audiences mostly listen to music services on their smartphones after they leave the workplace and on the road. The service is mostly used in big cities such as Istanbul, Ankara, Izmir, Bursa and Adana.

Users listen to music for about 20 minutes a day. Song download numbers are deficient compared to previous years. This trend shows similar features to world digital music trends. Users prefer to use offline mode the most, which is a way that allows users to reach content without any internet signal. Turkish audiences want to reach ready content. So, the curation ability and the lists are essential. They tend to consume what

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they see on the main page. Now audiences are not looking for individual songs or artist names. Instead, they prefer to listen an available list offered on the main screen according to their moods. Instead of searching for a specific artist or album name, they say “I want to listen to relaxing music now or energetic songs”. The habits of listening music or more generally consuming creative art products have a meaning of tendency of using cultural patterns.

Fizy has made agreements with all major music companies in Turkey for the Turkish music catalogue and significant companies in the world for foreign catalogues. Even if there are millions of songs in an application, audiences prefer to listen to a certain number of songs.

Fizy users are making positive comments about the free internet connection. They also shared their appreciation for design and radios in the most recent version of the service. Fizy marketing manager: “In Fizy, radio stations such as Babylon, Voyage, and Eksen came along with the new design/version. In addition, Fizy has also its own radio channels. With this innovation, we have seen that Fizy users are very eager to listen to the radio.”

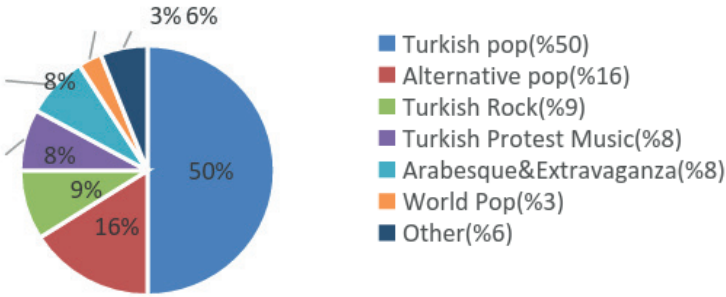
The video feature added in April 2016 is of great interest to users. Especially Turkish audiences are very interested in live concerts. A total of 1.8 million people followed the last nine concerts. The marketing manager commented on the concerts: “When concert plans are being made, we are paying attention to the stage shows and performances that will keep the user in the application longer. Concerts are watched over 95% of the mobile. We send a push notification to the users just before the musical performance starts. For example, a musician’s concert lasted 3 hours, but in the first 20 minutes of the concert, there were just talk and thanks. So, we sent a push notification after these talks and introduction, because we know that the users would turn off the application during that time. Throughout the concert, we can see real-time user figures (like rating

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system). When they receive or make a call, the users become out of the live broadcast.”

The digital music platform, Motto Music, examined Twitter shares of 20,815 university students and 14,900 young employees in the major cities of Turkey such as Istanbul, Ankara, Izmir, Eskisehir, Bursa and Antalya in 2015. The research has been created by filtering the YouTube links and has aimed to understand Turkey’s digital music trends. According to the research, 50% of the participants listen to pop music. In Table 6, there are other music genres that young audiences listen to the most. On the other hand, the least popular music genres are heavy metal and jazz among students and rap, jazz, soundtrack, heavy metal, and R&B among young employees.

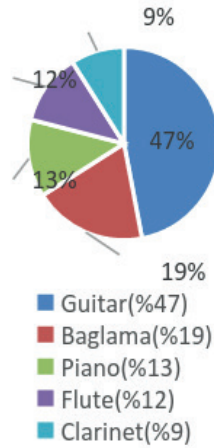
Table 6: Music Genres and Young Audiences in Turkey
Rates of Genres



Source: Burcu Sahin, “Motto Müzik’ten gençlik ve müzik araştırması,” *Digitalage*, 23 June 2016, <http://digitalage.com.tr/motto-muzikten-genclik-ve-muzik-arastirmasi/>

Table 7: Instrument's Rate of Interest among Audiences in Turkey

Instrument's Rate of Interest



Source: Sahin, "Motto Müzik'ten Gençlik ve Müzik Araştırması."

According to the report, 90% of the shared YouTube videos are music content. Guitar, bağlama (traditional instrument), piano, flute, and clarinet are the most listened instruments. The hours at which music genres are shared the most: pop music is between 18.00- 19.00, alternative pop is between 17.00-18.00, Turkish rock music is between 01.00- 02.00, Turkish protest music is between 22.00- 23.00 hours. Digital music services should analyze local culture, music taste and daily life practices to reach a young audience.

In this respect, recognizing social music audiences provides economic advantages for companies. The bundling model is also essential for music companies, musicians, and professional associations besides the audience. According to Fizy, some people make music and sell music on the system right now. Moreover, the system is based on the purchase of rights. "Copyright sharing is based on the revenue-sharing model we have

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obtained from Fizy subscriptions. Each organization is entitled to the performance in the month (the number of songs played) proportionally.”

Content agreements are made with the providers. These agreements give music companies the right to promote. Thus, music companies decide for themselves the artists and albums they want to advertise. In this case, the selected artists and albums are on the main banner. Previously, while providers were professional associations, music services now deal directly with record companies. When the artist changes the company, the provider is changed. Apart from agreements made with record companies, there are also individual agreements with artists called exclusive content. According to Fizy’s statement, the audience tends to listen to the musicians they see on the main page or banner.

The most important economic advantage of this model is that it does not create a sense of paying for users. This economic model is quite functional for Turkish digital music market. In 2015, 75 audiences between the ages of 15 and 60 were asked about their usage of ‘Paid Music Services’. 88% of participants answered, “No, I do not use any paid music service” (Ozturk, 2015, 221). Turkcell’s former CEO, K. Terzioğlu, made the following explanation about Fizy in 2017³⁵; “Turkcell’s music application Fizy proliferated. The day we looked at the screen, there were 3.6 million subscribers. These users downloaded 3.4 million songs the day before. Fizy doubled the number of Spotify subscribers in Turkey.” Fizy makes the following comment about the issue: “As an operator, we get money without making people think that they are paying money. This idea still makes you think that music can be reached freely. For example, the price of the platinum Turkcell package is 119 TL (Turkish Liras). We offer exclusive free services in 4.5G. We give unlimited music listening and watching videos on the internet with Fizy.”

³⁵ “Terzioğlu: İngilizce yerine robot yapmayı öğrenmeliyiz!” *Teknoloji Gündem*, 11 February 2017, <http://www.teknolojigundem.com/haber/terzioглу-ingilizce-yerine-robot-yapmayi-ogrenmeliyiz/1167485>

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There is a harmony between GSM operators, audience, and music companies in the bundling model. However, the system still has some problems. One of the most critical challenges is dealing with multiple music copyright. Also, not every music company has technological competence.

The bundling model is a user-accepted model both in the world and in Turkey as a local market, with all its advantages and disadvantages. However, digital technology transforms tools very quickly. It is a system that continually renews itself both in terms of economic enterprise and consumption habits.

As a result, the global and local music industry should understand the personal music taste and usage habits of the audience. Fizy IT Manager makes the following comment: “The most important issue for us is to know Big Data. For example, at what time or on what device do the audiences listen to music in an application? We need to define a standard, predictable behaviour. Besides, the most important issue for the future is the search mechanism. We have the curation team responsible for the preparation of the song lists.”

Another vital issue for Fizy is the recommendation feature. As an internet user, every action we make is under record. In this respect, advertising and marketing companies, private or government agencies recognize our consumer identity. Digital music services refer to the songs that we have listened to before and prepare customized lists accordingly. Like other examples in the world, Fizy has a ‘discover weekly playlist’. This list is based on the songs that the user has previously listened to in the service. Universal Music’s Global Head of Digital Business, F. Keeling: “The primary services all offer more than 30 million tracks and have a similar quality and approach. The value comes in what is being placed

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over the top. It is all about curation, recommendation, and influence.”³⁶ Technology is the most important feature of the digital music economy. Knowing the audience, predicting consumption and habits, preparing the infrastructure properly and providing a useful application are the most important issues both in the world and in local companies. Furthermore, competition starts precisely at this point.

Conclusion

This research investigates how the music industry is adapting to technology and the digital economy. The music industry, as an actor in the digital world, begins to produce new economic models and find new ways of income. However, the most important feature of technology is speed, which makes it difficult to change and develop the industry. Technology continues to diversify its vehicles and to exist in both global and local markets.

Music companies began to adapt to change from the digital music revolution at the end of the 1990s. The stakeholders in the music world have increased. Mobile phone manufacturers, telecommunication companies, digital music services and social networking sites are new actors of the music world. Income sources have also increased. Audiences can access the limitless music archive when and where they want it. This can be explained by the ‘mobility’ feature of technology. Increasing the use of smartphones is of great importance for the music economy. Over 2 billion smartphone users across the globe are potential music audiences. Smartphone becomes a more popular music listening device day by day.

The audience buys the GSM package and this service includes the use of digital music service. The audience can listen to a musician he/she likes in the music service or watch the video. They can follow the social media

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³⁶ “Charting the Path to Sustainable Growth,” *IFPI 2015 Report*, <http://www.ifpi.org/downloads/Digital-Music-Report-2015.pdf>

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accounts of their favourite musician, with their social media applications on a smartphone. They can find song lyrics or information about the musician by a search engine. The concert ticket can be purchased online. Here, a model of communication that interacts with each other is mentioned. As a result of this interaction, a new term emerges: ‘social music audience’.

Digital music services have thousands of hours of music listening experience. Both global and local companies have similar thoughts on these experiences. The lists become more and more critical. Audiences prefer to choose moods instead of looking for songs or artist names. Contents such as radio, podcasts, concerts, and videos are also remarkable. The audience is a consumer at the same time. In this case, digital music services take into account their audience behavior and provide them with personalized recommendations. Consumer behavior is recorded in the technology world continuously. As a result, companies can conduct marketing and sales by predictable, standardized behavior.

Digital economy, mobility, and advanced technology create a global world. In this case, global brands try to understand local markets and local brands want to show themselves in the global world. The global market has given great importance to localization in the last few years. Companies work to prepare local curation and editorials, so they need to receive support from local experts. They want to offer content appropriate to that country’s music taste. The case study of the research is Turkcell and Fizy companies. According to the interviews, it is imperative to know the profile of the audience in different parts of the country and the confidence in the brand. In terms of economic perspective, the audience still thinks that music is free because of the GSM packages. On the other hand, users are affected by the data being free and having an offline feature of the application.

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In conclusion, the music world will continue to create new economic models in the future and partner with technology companies. Musicians, record labels, and audiences become part of the digital world. Technological innovations affect the socio-cultural environment. Therefore, music will gain many practical new meanings, such as producing, spreading, possessing, listening, sharing, or watching.

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