Monetising the music: the new characteristics of the recorded music field.

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The development of internet and mobile providers as media through which one may have access to recorded music has not only profoundly changed the way music business is done, but also the force-relation in this business. These innovations demand an analysis from a sociological perspective in order to rethink the view we have of the record industry. Usually we find concepts of 'music industry' separated into what are called core and related activities. Patrik Wikström (2009), for instance, brings us two of these concepts, one being adopted by the British government (Department for Culture, Media and Sport; see NA, 1998) and another proposed by Engström and Hallencreutz (2003) in which we can see such a separation. Within the core activities, the British government proposes "production, distribution and retailing of sound recordings; administration of copyright in composition and recordings; live performance (non-classical); management, representation and promotion; songwriting and composition" (Wikström, 2009: 48). Engström and Hallencreutz (2003: 39) present as music industry organisations: "music press; record labels/producers/studios; music publishers; mastering studios; suppliers of stage equipment; distributors and wholesalers; music retailers; retailers of music instruments and studio equipment; e-business; management; artists/musicians/performers; tour production and concert arrangements; artist agencies" (Wikström, ibid.). It is interesting to note that business related to internet and mobile providers are left to the so-called related activities. It is here where we find, among other activities, internet/e-commerce, broadcasting, software and computer service, advertising and so on.

The separation of the core music activities from others is also to be found in an extended study carried out by David Hesmondhalgh (2007). He defines the core cultural industries as related to broadcasting, film industries, "content aspects of the internet industry", music industries, print and electronic publishing, video and computer games, and advertising and marketing. With Respect to the music industries, we have: "recording (which, of course, includes the recording of sounds other than music, but is for the most part centered on music), publishing and live performance" (ibid.: 12). If in terms of content the internet industry is one of the "core cultural industries", it is separated from the music industry as two different realms. Besides, when Hesmondhalgh thinks about other services related to the internet, not related to content, he organises them as "borderline cases", where we find, among others, "consumer electronics/cultural industry hardware and the software industry" (ibid.: 14).

Definitions should be seen as analytical tools and, as such, there is no right or wrong, but they may be more or less useful as applied to specific analysis. However, I consider them as insufficient for a sociological analysis of the impact of the development of new media outlets on the way music is distributed and consumed. The reason for my dissatisfaction is that in these definitions it is proposed that the music industry and the consumer electronic and telecommunication industries inhabit two different realms. Inasmuch as those industries have different ways of operating, with different agents and different values, for the understanding of music distribution and consumption today those realms must be seen as part of the same space. That is especially the case of recorded music, my focus here, which has the characteristic of its business operation determined as much by agents and values related traditionally to the record industry, as by those belonging to the other two industries.

Therefore, I want to propose that those values and agents be seen as not belonging to two different realms but as part of the same field of forces. I deliberately borrow the term 'field' from Pierre Bourdieu (1993), and with it I want to propose that, in the distribution and consumption of recorded music, there is a process of tensions and agreements posed by different agents and values related to those industries. If, as the literature suggests (see Frith, 2007, 1988; Wicke, 2001; Wikström, 2009;

Malm, 1992), the record industry has, since the 1930s, regulated the way music is distributed and consumed (and produced, certainly, but that is not my focus here), in the present time this moment is over and that industry has to operate in the same field as the consumer electronic and telecommunication industries, negotiating with them the physiognomy of this field. Consequently, I want to name this field as the *recorded music field*[1], in which we see in operation the record (here included the phonographic, publishing and distribution companies), but also the consumer electronic and the telecommunication industries, terms I borrow from Hesmondhalgh (2007: 97–101) to cover companies producing devices (such as computers, mobile phones, MP3 players, etc.) and providing telecommunication services.

I argue that with this conceptual approach we can better see how the idea of free, which is omnipresent in the internet, is transferred to the recorded music field under the theme of monetising. Having that in mind I will be able to critique the idea of free and, therefore, elaborate the forces that are behind the monetising practice.

Before I continue I need to explain why it is possible nowadays to speak of such a recorded music field. The central point here is to understand that for decades there was only one type of media in which a consumer could enjoy recorded music. That media was more recently the CD, which along with its antecedents (like the cylinder, vinyl, tape, etc.) served as the software of the music industry (Frith, 1988: 18). If it was also possible for a consumer to enjoy recorded music via radio, firstly this was dependent on its pre-programmed playlists (the listener could not directly decide what would be played) and even the broadcasting was based on that software (the music played in radio had to be recorded in a software). This is not our reality today, as we see a proliferation of media in which a consumer may easily enjoy music. In research carried out in the UK (Olswang, 2008: 58) a heterogeneous group was asked what they do at least once per week, the options being given by the interviewer. The following answers were received: listen to AM/FM radio (62 per cent); listen to CDs on CD player (54 per cent), listen to CDs copied to computer (44 per cent), listen to DAB (Digital Audio Broadcasting) radio (29 per cent), listen to downloaded music (28 per cent), listen on PC to streamed music (26 per cent), listen on other device (not PC) to streamed music (15 per cent), downloading paid for music (14 per cent), downloading illegitimate music (10 per cent).

Therefore, if the CD is still an important media for music consuming, it is also clear that there are other highly used media available for the same purpose of enjoying recorded music. The CD loses its previous exclusivity. Besides, it also loses its importance in terms of remunerating artists. "If it's true that till very recently musicians could make two thirds of their income on the sales of records, it is important to highlight that today that proportion has been inverted" (Herschmann & Kischinhevsky, 2011: 30). According to a research carried out by a group at the Universidade de São Paulo with musicians living in Brazil, not one musician was receiving at least half of his income from CD sales (GPPPAI, 2010: 86).

What is the implication of such a proliferation of media and the downgrading of the CD in terms of business organisation for my discussion? The business with the CD (and its antecedent media) as a sound-carrier was exclusively controlled by the record industry. As it was the predominate media for the enjoyment of music, it allowed that industry to control the distribution and the consuming of recorded music. As the CD loses that monopoly and, in reality, is no longer needed for the enjoyment of recorded music, correspondingly the record industry loses its centrality in the field of recorded music and sees the entry of other industries – owners of the new media pertinent for such – in to this field. It is not to say that the record industry is powerless in this new scenario, but that it must now negotiate with other industries – consumer electronic and telecommunication industries. This is a characteristic of the recorded music field.

Although the new reality has initially provoked conflicts, with the record industry, represented by the IFPI (International Federation of the Phonographic Industry), carrying out thousands of lawsuits against companies related to the other industries (see Wikström, 2009: 153), the changes have been persistent and constant negotiations the norm. As affirmed by Hesmondhalgh (2007: 251) – whose thoughts on the cultural industries are perfectly appliable to the music industry – "[w]hile the cultural industries would have liked serious restrictions to be placed on the facilitiation of copying on computers, the might of the USA's software and telecommunications industries was always going to make such measures unlikely".

Along with the growing number of internet and mobile users, there is no other way out for the record industry than to negotiate with the consumer electronic and the telecommunication industries and find modes to operate in the field. After all, there were 1.966 billion internet users in June 30, 2010; 28.7 per cent of the world population (WIS, 2010), and there were 4.6 billion mobile cellular subscription, corresponding to 67 for every 100 inhabitants globally in 2009 (ITU, 2010). If we remember this population is potentially only one click away from consuming music, we can understand why there are many more potential consumers of music now than at the time when people were dependent on a physical record store, located sometimes miles away from their home. It is not surprising, therefore, that the leading global store – physical or digital – for music sales turned out in April 2008 to be iTunes (Apple, 2008).

All these changes lead to the fact that the recorded music field has to leave behind a business model based almost exclusively on the sale of CDs. More importantly yet, the music businesses have become increasingly dependent on the goods and services of consumer electronic and telecommunication industries, which explains why their companies must be treated as an internal part of the recorded music field. As a consequence of the entrance of these new players in the field, the record companies must now negotiate with these industries for the configuration of that field. In a very tense struggle we see agreements among those players, as started in 2003, when the five majors of the time (Universal, Sony, BMG, Warner and EMI) partnered with online store iTunes – recently created by the technological giant Apple to provide content for its MP3 player, the iPod, launched two years earlier – and licensed their recordings. And year after year, the record industry sees its revenues more and more dependent on the goods and services provided by the other industries; in 2009 a total of US$4.2 billion, 27 per cent of the record companies' revenue, came from digital sales (IFPI, 2010a: 4).

The necessity to the record industry for such agreements should have been made clear so far in this text. It is clear enough that the access to music through the media outlets controlled by the consumer electronic and telecommunication companies is a reality, one that may be controlled, but not halted. But these agreements are also necessary for the other industries. As Max Weber (1995) argued, the capitalist ethic is legalist and those companies operating in this system must, therefore, abide to the law. It is to be expected that the consumer electronic and telecommunication companies strive to be seen as bound to legality. In terms of music distribution, this legality is on the side of the record industry. In spite of the many public questioning of the validity of copyright laws, so far most government action around the world has served to recognise and reinforce the rights the record industry.

Therefore, we have a scenario in which the record industry can no longer be lucrative without the services provided by the consumer electronic and telecommunication industries. At the same time, those industries need to negotiate with the record industry in order to continue operating legally. Within this mutual interest, spaces of agreements are created, which I want to term as *zones of solidarity*. With this nomenclature, I want to point to the fact that within the recorded music field, if there are conflicts among the agents and their values involved, there are also movements of those agents to find conditions in which they can operate in agreement. I do not want, therefore, to leave out the fact that we are dealing with a strained field, but to point out that there is also solidarity between those agents in order to make mutually profitable business.

According to these zones of solidarity, we can see that companies like YouTube now have a leading presence in such music industry fairs as Midem (the biggest in the world, running for over 40 years), where in 2011 representatives of these companies participated at the Midem Conference (talking on such topics as "Music on YouTube: How the universal language has found its global platform"), reinforcing the necessity of guaranteeing music copyright. Let us not forget, even if it is not related to music, that YouTube in 2008 partnered with the Olympic Games and transmitted the Games on its channel, forbidding, however, any unlicensed video to be uploaded. Similar agreements have been made with record companies, guaranteeing that only licensed videos can be watched on YouTube. Google states: "do the right thing in a more general way – *follow the laws*, act with honor and treat the others with respect" (in Kimura, 2008: F10; emphasis added). Similarly, the recently released Brazilian Digital Music Award, presented by the giant mobile company Oi, states in its promotional emails that it supports the National Council against Piracy.

At the same time the partnerships between the industries are more than welcomed in most of the recent reports released by the record industry's organisations (see IFPI, 2009, 2010a). For example, in 2009 the IFPI stated:

> Partnerships with technology companies are integral to the changing business model. Music industry revenues in the next few years are likely to come increasingly from revenue-sharing deals with Internet Service Providers (ISPs), hardware manufacturers, handset makers and other technology companies. Technology companies look to

> music to add value to their services and enhance their own business model while music companies look to these partners for their enormous reach into consumer's homes and lifestyle (IFPI, 2009: 4).

Precisely these partnerships characterise the zones of solidarity within the recorded music field. In these zones, however, the business has a new characteristic and one can trace it by realising that the vocabulary has changed. Where the record industry has no exclusive control there is less talk about buying and selling music; the new defining word is *monetising*. In the 2010 edition of Midem there were two conference cycles: Midem Conference and MidemNet, the latter being dedicated to business related to the new media. The central theme of this conference was: "MidemNet 2010: From Content to Context: Monetizing the New Music Experience" (Midem, 2010). It is to be noticed that the debates about piracy had practically disappeared (they were dominant when I first visited the show in 2003) and most of the panels were focused on the new media and the idea of monetising. Of interest is that the 2009 Conference keynotes featured speakers not related to the record industry, but to technological and media companies like MySpace, Kodak, YouTube, Activision/Blizzard and Spotify.

Monetising

As has been suggested by Pierre Bourdieu (2004), every nomination has an implication; it translates a power relation. In this section, I want to explore the nomination of monetising. I propose that the idea of monetising is a clue in order to understand how the entrance of the new agents in the recorded music field has changed its appearance and the character of the value of music itself. In order to understand it, I need to briefly consider the internet.

It is common to forget that the internet, a space open to any user, makes available such a huge amount of information, and that only through organisational tools (such as search tools) can such content be accessed. That means that the internet needs organisation, classification. Manuel Castells (2007: 116) reminded us that, according to a Berkeley University research, there were as early as 1999 ca. 550,000 million documents in the web, with 7.3 million webpages added each day to the virtual space. Wikström (2009: 159) offers more recently published data:

> In the digital age, anyone can get published, and anyone can be a writer. … Every day 175,000 new weblogs are launched, and 1.6 million new posts are published. YouTube, the largest web community for user-generated videos, claims that ten hours of video content is uploaded to their service every minute.

It is very clear that the sheer quantity of information available on-line indicates that the average person can only enjoy a minute amount of what is available. Therefore the user will be limited to some websites, which can offer him or her organised information. Such a necessity leads, as already pointed out by Jörg Wojahn (1999: 70), to a concentration, making some websites overwhelmingly more accessed than others. There are some figures that confirm this. Based on North-American users, on the week ended on 3rd March 2011 we had the following panorama (EH, 2011): a) social networking websites: the three most accessed websites concentrated 85.18 per cent of the visits (Facebook 64.19 per cent, YouTube 19.58 per cent, MySpace 1.41 per cent); b) search engines websites: Google (63.44 per cent), Bing (12.94 per cent) and Yahoo! Search (11.79 per cent) concentrated 88.17 per cent of the visits; c) and if we look to the top 10 accessed websites that is what we had:

Website	**Visits share (%)**
Facebook	10.31
Google	7.66
YouTube	3.14
Yahoo! Mail	3.09
Yahoo!	2.46
Bing	1.56
Yahoo! Search	1.42
Gmail	1.03
Windows Live Mail	1.01
MSN	0.92
Top 10 total	**32.6**

We must bear in mind that music passes through all these websites. It is fundamental only for some,[2] but present in all. Importantly, however, these websites, which so overwhelmingly concentrate the internet accesses, have their businesses based on services provided without monetary payment by the people who "hire" them. In other words, the money which remunerates the services of those companies does not come directly from that people who surf on their webpages looking for a video or for their friends. In this scenario the company's aim is to monetise through the user's online activity, generating revenue without the user spending a cent. As George Yúdice (2007: 55) has noticed, "the big internet companies – Google, Yahoo, etc – are looking forward to monetizing the network websites by all possible means".

That monetisation is based on advertising, which is a market that grew from 2003 to 2009 from US$7.27 billion to US$22.7 billion in the United States (IAB – Internet Advertising Board 2010; see also Hesmondhalgh 2007, chapter 9). As a recent report published by Google shows, out of a revenue of US$ 23.6 billion earned by the company in the twelve months ended December 31, 97 per cent came from advertising revenues (Google, 2010). I have no space here to describe the way these ads work, but it is important for the reader to bear in mind that the ads are shown according to the user's own online surfing practices. As we surf on the internet we leave our data as well as revealing our tastes and habits, which are collected and organised by companies, like Google or Facebook. These companies trace our profile (we can be allocated by Google to some 60 categories and 240 sub-categories) and offer it to advertisers who want to place an advert aimed at specific consumer's profiles. Therefore, two people navigating on the internet, even though they may visit the same page, are likely to see different ads because their previous navigation practice may have been different; they may be filed under different categories and, therefore, exposed to different ads[3]. As a European executive of Google narrates (in Rafaela von Bredow, 2010: 69):

> If you look for in the internet by the category 'Golf', then our engine cannot know if you refer to the sport, the automobile or the Mexican Gulf. But when you actively unlock in your account to a personalized search, then we record that you often searched in the last year for a golf professor. Thus, we can deliver a better result for your search.

This reality is something directly related to music. Whenever we listen to some music by streaming (on demand or not) or download and there is an advertisement shown to us, whether we click on the advertisement or not, our action will be related to our musical taste. Therefore, it will be possible to say that people who listen to a particular kind of music click more often on, for example, vehicle ads, than those who listen to other kind of music. According to this information their profile will be improved. Consider QTrax as an example. QTrax offers licensed music for download based on advertisement, which means without the consumer outlaying any financial cost. When I choose a track to download, an advert appears, be it a video about a car, a coffee machine, etc. I must watch this video to the end and after that I have to answer whether I have any interest in the advertised product. It does not matter which answer I choose; after my decision the download starts and I have the music transferred to my device. The point is that my music taste can be easily related to taste in other products. Taking a wider view, it is possible to say that people who like x type of music are more likely to have interest in y type of cars, but less for coffee machines. That is the information QTrax is able to sell to the advertisers, basing such knowledge on the fact that the music has been 'freely' (and I will have more to say on the idea of free below) given to the consumer who, therefore, has had her tastes monetised.

Certainly QTrax is a clear example. More complex and subtle ways are used in order to make profit out of users' surfing practices. What is important is to note that this navigation practice is what underlines the idea of monetising. Through the internet, users may have financially free access to cultural content as long as they leave behind their practices to be monetised by the telecommunication and consumer electronic industries. There is, therefore, a new kind of consumption. This is different from the traditional act of buying and selling, in which the consumer effects a financial transaction in return for goods or services. It is also different from the world of advertising on television and radio, which we have accompanied for decades, where we would accept the advertising in exchange for free programs. This was usually a passive and anonymous behavior, awaiting the end of the commercials before returning to the normal viewing.

With the internet, the situation has changed. We search for a word or watch a video clip and the advertising jumps out at us. We are no longer passive, as we were in front of the television. There are no couch potatoes on the internet. But our action in relation to internet advertising does not end there. The advertising is directed at us according to our profile, our online surfing practices which leave digital fingerprints wherever we go. The more we act, the more we 'work', the more we adapt the advertisements to our online mirror-images, because while we surf we leave hypertexts bits about ourselves. "The more avid users of the [internet] services leave half of their lives: every Website they visit, every ad they click, they reveal something about themselves" (Rafaela von Bredow, 2010: 60).

And all our 'work' can be used by the consumer electronic and telecommunication industries, and by them monetised, as they get more advertising to the net as they offer the result of that 'work' (our profiles) to the advertisers. However, this 'work' is rarely perceived as such and this blindness is what allows the internet to be seen as the space of freedom, this freedom often being related to the idea of *free*. We have the sensation of browsing through content and services whose benefits cost us nothing. However, free would be a situation in which we truly receive something for nothing in return. This reality does not apply to the internet. In every moment of our online surfing we are exchanging something for something: we exchange our time, our data, videos that we upload on the network which will be used as a tool for attracting users to the site for music, other videos, information, network experience etc. And everything we yield – the 'work' we make on the internet – can be monetised by the companies with the conditions for doing so. Therefore, the notion of the internet services being free is misleading. They are paid under a contract never signed but always present in the idea of monetising.

The new character of value within music

Business proposed in the zones of solidarity is integral to this scenario. The record industry needs to learn how to monetise music. George Yúdice (2007: 62) quotes Will.i.am (musical producer and member of the band Black Eyed Peas), who says the proposal "is to transform fans into promoters and distributors … The model here is to monetize every fan activity and formalize agreements, like conceding commissions for music and video they upload to social networking sites, which sell or generate publicity insertions". Patrik Wikström (2009, chapter 5) shows the many ways the industry is now working on this perspective, and the IFPI (2009: 11) celebrates supposing that "half the most popular streams ever viewed on YouTube are licensed music video from artists such as Alicia Keys, Avril Lavigne, Chris Brown, Leona Lewis and Rihanna". In 2011, during the Midem Conference, a YouTube representative stated that 2010 was the "key year for music monetization in most key countries in Europe". His aim for 2011 was "more monetization" and "monetization everywhere". The promise was "every time one of our tracks is used [on YouTube] we are able to monetize"[4]. Bearing in mind that the record industry will not sell more products (CDs), Gerd Leonhard (2009: 39) proposes that: "The only thing left to do is to monetize the existing, actual behavior of the users, a.k.a. consumers, a.k.a. music fans, and there are many new ways to do that".

Therefore, the record industry, in the zones of solidarity of the recorded music field, assumes the values typically related to the electronic consumer and telecommunication industries, leaving behind the approach based on selling and buying in order to find ways to monetise the user's practices. This passing of values can only be seen if we understand those industries as being integrated within the same field – the recorded music field – as I am proposing here. However, saying that there are similar values now shared by the agents of those industries is not enough to understand the phenomenon. It is also important to notice that music has also changed its own condition of generating revenue, being mostly transferred from the record industry to the other industries operating on that field. It is to be assured that it is not right to say that music is generating less revenue, but that this revenue is now relocated to agents other than those of the record industry. As a consequence, the character of music's value has changed. In this new scenario, music does not, primarily, sell itself, but sells other products.

We can see it in a more concrete way when we look at Universal Music Group (UMG) and Sony, the two biggest music labels in the world. Firstly we take UMG, a company owned by the French media complex Vivendi. This corporation has among its main companies, besides UMG, Canal+ Group (TV channel), SFR (mobile phone provider) and Activision/Blizzard (one of the biggest game companies in the world, in which Vivendi has a 54 per cent share). Vivendi reports the following sales and its distribution according to its companies:

Company	Sales (in million Euro)	Percentage
Activision Blizzard	3.038	11,20%
Universal Music Group	4.363	16,08%
SFR	12.425	45,79%
Maroc Telecom Group	2.694	9,93%
GVT	104	0,38%
Canal+ Group	4.553	16,78%
Other Operations	-45	
Total	27.132	

Table 1: Sales Vivendi 2009 and distribution according to the companies. Source: My elaboration, based on the data present on Vivendi's report (Vivendi, 2009: 150).

UMG accounted for 16.08 per cent of Vivendi total sales in 2009, being the third, out of the six companies presented, in terms of value that year. Therefore, the biggest record company in the world represents less than one sixth of the global sales of the group by which it is owned, much below the mobile phone company SFR, which represents almost half of Vivendi's sales.

Let us now consider Sony, owned by the media and technological group Sony Entertainment, and check the sales of the group distributed according to its segments (see Table 2).

We may note here that the music segment represented in 2009 just over five per cent of the group sales, being the fifth segment in revenue, out of the six cited by the Sony's report.

Based on these figures it would be seductive to affirm that the economic importance of music to these corporations is minor, which would be to say that music had lost its market value. However, this is a shallow perspective. Actually, almost all the other products and services that the companies offer benefit from the growing interest in music. The mobile phone providers benefit from music because the mere fact that someone goes online to listen to music or to download it leads the user to its services. In the case of games, the main content of Activision/Blizzard's most popular game, Guitar Hero, is based on music. And Guitar Hero

Segments	Yens (in thousands)	Euro (in thousands)	Percentage
Consumer Products & Devices	4,031,483	34,900	52.15%
Networked Products & Services	1,755,643	15,198	22.71%
B2B & Disc Manufacturing	559,993	4,848	7.24%
Pictures	717,513	6,211	9.28%
Music	387,063	3,351	5.01%
Financial Services	538,206	4,659	6.96%
All Other	318,422	2,757	4.12%
Corporate and elimination	-578,320	-5,006	
Consolidated Total	7,729,993	66,917	

Table 2: Sales Sony Entertainment 2009 and distribution by segments. Source: My elaboration, based on data present on Sony's report (Sony Corporation 2010: 48)

is not an exception: music games were responsible for 32 per cent of the games industry's growth in 2008 in comparison to previous year (IFPI, 2009: 12). In the case of electronics and mobiles consoles, one of the most important applications of these gadgets is the storage and reproduction of recordings[5].

I do not mean that these corporations do not care for their revenue coming directly from the music market. Evidently, those companies have proper departments with specific targets for each segment. What I want to show is that in the recorded music field, if the capacity of music to generate capital is limited, its capacity to generate capital to other businesses – to be monetized – is huge. Therefore, Nokia released in 2008 the mobile phone Nokia Comes With Music, offering unlimited and free music, being the value related to that music already included in the device's price (IFPI, 2009). The mobile phone SonyEricsson also offers PlayNow, unlimited access to music (IFPI, 2009: 9). The Danish internet and mobile phone provider, TDC, offers its subscribers, without extra cost, unlimited access to music and credited to this service the assumption that, after its launching, the quantity of costumers who switched competitors dropped 30 to 40 per cent on the mobile phone service and 60 per cent on the broadband (ibid.). Finally, HP announced in 2010 the sale of its computers allowing unlimited access to the whole catalog of UMG for one year. Therefore, it is possible to say that if the consumer is not willing to spend money buying music, he accepts to forget the payment if it is in the value of the product or service he buys.

Therefore, we must notice that behind the idea of monetising there is a transformation of the character of the value of music, which now embraces its ability to sell the products and services of consumer electronic and telecommunication industries. And it is in these, in fact, where most of the capital is concentrated, proving that the value of music has been not annihilated. This can only be properly understood if we change our conception of the internet as free space. If, since 1990, it began to take shape in accordance with commercial interests (Castells, 2007: 77), today it has become the established space of the consuming relation, where everything is based on trade. Monetised music is therefore a key element of this space.

Conclusion

The decline of the record industry and the creation of new music business models changes the power relation within the recorded music field. Now we are obliged to recognise that within this field there are other agents in action and the researcher should be aware that we are dealing with a taut – what means conflicting, but also cooperative – relationship of the record to the consumer electronic and telecommunication industries.

This new force relation presents a different characteristic of the field, which I hope I could explain here. One of the most important is the new character of value within music. Music no longer generates its revenue from the sale of CDs or other carriers, but from its capacity to sell something else, linking customers to other products and services. More than seven decades ago, the capacity of selling discs has been identified by T. W. Adorno (1991: 173) as the fetishism in music. According to him,

> [i]f the commodity in general combines exchange value and use value, then the pure use value, whose illusion the cultural goods must preserve in a completely capitalist society, must be replaced by pure exchange value, which precisely in its capacity as exchange value deceptively takes over the function of use value.

What Adorno meant was that music lent to the product it was selling (the disc) the perception of use value when, actually, it was covering a typical commercial exchange. Ironically the situation today is not structurally different but actually radicalised. It is so because music today lends its use value – reinforced by its supposed gratuity – to other products and services. This structural permanence and the different products to be sold is what has kept the recorded music field working, but under a new guise.

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Endnotes

1 I use the term field as a metaphor for a space where social conduction is taken. I could use space or sphere (as Weber did, for instance), but I chose to use field as I want the reader to have Pierre Bourdieu's concept in mind, whose champ was translated as field into English. However, I should warn the reader that the term here has nothing to do with the physical field, or the field work undertaken by the ethnomusicologists.

2 Gerd Leonhard presents a survey carried out in 2007 with 1,700 UK consumers, to show a massive increase "over the last 12 months in usage of sites containing music such as YouTube (up 310 % to 53 %) and MySpace (up 57 % to 55 %). Amongst teenagers the incident is huge – 77 % have used MySpace and 69 % YouTube. For users of these social networks, music is playing an increasingly important role. For example, 39 % of social network users have embedded music in their personal profiles (65 % of teenagers). Approximately 70 % do so to show off their taste and half do so to reflect their personality" (Leonhard, 2009: Chapter 33).

3 I asked students of social science attending my course 'Sociology of Culture', held at UNICAMP in the first semester of 2010, to write down on Google's search engine the word hotel. They should do it at home, print the front page and bring it to the next class. As it was expected, in the space dedicated to advertisement at Google's page (usually above and on the right side of the page) each student received different hotel's ads. For those who hardly leave the city where they live, the results were mostly related to hotel located close to their homes. For students who travel more often, hotels in Miami, for instance, were offered.

4 "Music on Youtube: How the universal language has found its global platform". In Midem Conference, 25th January 2011.

5 On average, 24 per cent of the mobile phone holders in the United Kingdom, France, Germany, Italy and Spain use their device to listen to music (Nicolas-Reyt 2010).

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