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'Glocalisation' of Music Streaming within and across Europe

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‘Glocalisation’ of Music Streaming within and across Europe

Will Page and Chris Dalla Riva



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'Glocalisation' of Music Streaming within and across Europe

Will Page* and Chris Dalla Riva**

Abstract

This EIQ paper was inspired by the [headline](#) 'British artists in a historic clean sweep of 2022's Official Top 10 singles'. British artists accounted for all the Top Ten of the end-of-year singles chart of 2022 – for the first time since the charts were published over 50 years ago. A quick glance across the continent uncovered a similarly intriguing trend. Many of the top ten acts in Germany were German, many in Italy were Italian and all the top ten songs in Spain were in Spanish, although the vast majority were Latin American. These observations prompted us to ask a pertinent question: has the ubiquity of streaming increased or decreased the threat of homogenisation? As consumers are now accessing their music by global platforms (not local retailers), does this help or hinder domestic markets? Our analysis of ten European markets uncovers a phenomenon that we've termed 'glocalisation', where the majority of countries studied saw an absolute and relative increase in the domestic share of their top ten songs and artists in 2022. The impact of 'glocalisation' is as important to countries' creative industries as it is to their policy makers. Contrary to the perverse effects of globalisation where large markets often dominate small, we uncover evidence of local markets growing in their domestic identity. Finally, if local European markets are benefiting from glocalisation, spare a thought for English speaking markets who traditionally had a comparative advantage in music-exports - as they are now struggling to get their English-language repertoire heard overseas.

Keywords: Creative Industries, Cultural Policy, Globalisation, Homogenisation, Diversity, Music, Media, Digitisation, Streaming, Artists, Spotify, Social Attitudes, Regulation and Europe

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Table of Contents

| | |
|---------------------------|-----------|
| 1. Introduction | 5 |
| 2. Data and Method | 6 |
| 3. Results | 8 |
| 4. Interpretation | 18 |
| 4. Conclusion | 22 |
| About the Authors | 24 |
| Acknowledgements | 24 |
| References | 25 |

'Glocalisation' of Music Streaming within and across Europe

William Ivey, a country-music historian who would one day oversee the Library of Congress's National Recording Registry, considered part of the phonograph's legacy to be a flattening out of local musical cultures. "We once had a fairly vigorous assortment of regional musical styles in this country in both popular and folk traditions, but the impact of recordings-- setting national standards of what, and how, music should be performed - has pushed us toward a homogenization of these distinctive traditions ... Recordings have, quite simply, changed the way we hear music. Performances are now joyously diffused through space and preserved through time, but our audience has come to focus extensively upon the recording itself rather than upon the music it contains ..."

- Perfecting Sound Forever: An Aural History of Recorded Music by Greg Milner

'Glocalisation' of Music Streaming within and across Europe

1. Introduction

Globalisation is a divisive term, as it remains unclear who its winners and losers really are. Proponents argue that poorer countries catch up with rich ones, whereas sceptics counter that richer countries exploit their first mover advantage to widen the gap. In cultural industries, smaller markets fear dominance of larger ones, leading some – like France and Canada – to resort to quotas to protect their presence in local media¹.

Music is a strong proxy for cultural industries as a whole because it has a history of being first. It was the first to suffer and first to recover from digital disruption, spending the first decade of the millennium fighting piracy sites like Napster, and the second decade embracing streaming sites like Spotify. Critics have long feared that the increasingly standardised means of music production and consumption that have accompanied globalisation would inevitably lead to the homogenisation of music. Yet what we find is that among a set of 10 European countries, the rise of global streaming platforms correlates with a strengthening of local music. We call this somewhat counterintuitive phenomenon 'glocalisation' (see box).

These results suggest important implications around creators, consumers, companies and policy makers. For creators, this may influence many cultural choices such as the language they choose to perform in. Consumers who see their local artists topping their charts will arguably be more likely to develop an affinity to the artist (e.g., higher demand for concert tickets) and feel a stronger sense of national identity (e.g., less reliant on English language content). Companies may need to consider reallocating resources, with more devolution and

¹ See [Canadian content requirements for music on Canadian radio](#) which ensure that at least 35% of the Popular Music they broadcast each week is Canadian content. See also "[French radio goes to war with language quotas](#)" that requires a minimum of four in ten songs broadcast by domestic radio stations to be in the French language.

less centralisation in decision-making. Policy makers might want to reconsider the merits of free globalised markets versus protectionist national policies. For all stakeholders invested in local music, the results and discussion provide useful context about competing culturally in a new status quo.

Glocalisation, and its origins

The sociologist Roland Robertson popularised the term 'glocalisation' - a linguistic hybrid of globalisation and localisation - in 1995. According to Robertson, the word had been modelled on Japanese *dochakuka*, the agricultural principle of adapting one's farming techniques to local conditions, but also adopted in Japanese business for global localisation, a global outlook adapted to local conditions. Put more broadly, glocalisation is micro-marketing: the tailoring and advertising of goods and services on a global or near-global basis to increasingly differentiated local and particular markets. To demonstrate his remarkable foresight, Robertson identified that the proliferation of 'ethnic' supermarkets in California and elsewhere "does to a large extent cater not so much to difference for the sake of difference, but to the desire for the familiar and/or to nostalgic wishes".

2. Data and Method

At its core, this is a study about charts. Cynics may argue that in a digital world of infinite shelf space with 100 million songs available on phones – a far cry from Steve Jobs' promise from 20 years ago to put 1,000 songs in your pocket – charts no longer matter. We argue the opposite. Charts make the popular more visible and the visible more popular. In a market with unlimited choice like digital music, we argue that charts are more relevant than ever. Streaming platforms are currently onboarding 100,000 songs a day; as told in the book *Tarzan Economics*, that's more music than was released in the calendar year in the eighties.

In such a crowded market, anything that helps you stand out gains primacy. As charts serve that exact purpose, we argue that their cultural relevance has grown. They're not perfect, but we believe in their enduring significance, and in this work we study the top songs and artists across 10 European markets in 2022.

Each country has its own chart body, and each chart body has its own methodology, which makes cross-country comparisons complicated. In the UK, the Official Chart first considered audio streams in July 2014 – with 100 audio streams equating to one single purchase. In the US, the Hot 100 chart factors in sales, streams, and radio airplay using a points system. The German album chart is based on value as opposed to volume, so, holding everything else constant, increasing the price increases your chart position. To facilitate a valid international comparison, we developed a standardised solution.

Luminate, the official source for global streaming data, provided comparative audio-and-video streaming data for 2022 to establish the top 10, 40, and 100 songs and artists for each country. Luminate considers the reporting methods in each of the 10 countries included in this study of sufficient quality to ensure valid comparisons. The included countries, and their global label revenue ranking (based on the most recent IFPI Global Music Report 2023), are as follows: United Kingdom (3rd); Germany (4th); France (6th); Italy (11th); Netherlands (12th); Spain (15th); Sweden (16th); Poland (20th); Ireland (29th); and Portugal (40th). Combined, the total label revenues for these 10 countries amounted to \$5.9bn, making up 81% of the European market and 22% of global revenues.

After deduplicating the artists and songs in our data set, we mapped this data to Gracenote's nationality ID metadata to build a new authoritative source for defining a local artist and a local song, making it possible to draw out international comparisons. This was then cleaned manually to account for idiosyncrasies, such as ensuring that the nationality of the lead artist is used in cases of collaboration.

Finally, to provide a historical benchmark, the IFPI, an international trade body for record labels, provided the top 10 songs for 2022 (when downloads dominated charts) and 2017 (when streaming was still in its infancy).² We then manually identified artist nationalities to arrive at a ten- and five-year historical reference point.

There are many caveats with this type of analysis. To begin with, it's worth asking what is a nationality anyway? Chart topping Harry Styles is clearly British for the purpose of this study, but he's being marketed out of the American headquarters of Sony Music. So, when Harry tops the charts, it's the American office within the music industry who can take the credit for this very British success story.

Another important caveat related to the relative success of artists is the release schedule. This is particularly important in smaller countries that may depend on just a handful of domestic acts. If those local acts all release music in years outside of this study, then we're not capturing a true picture of glocalisation over time. Despite such caveats, this study puts a helpful marker down for analysing and tracking glocalisation in the future.

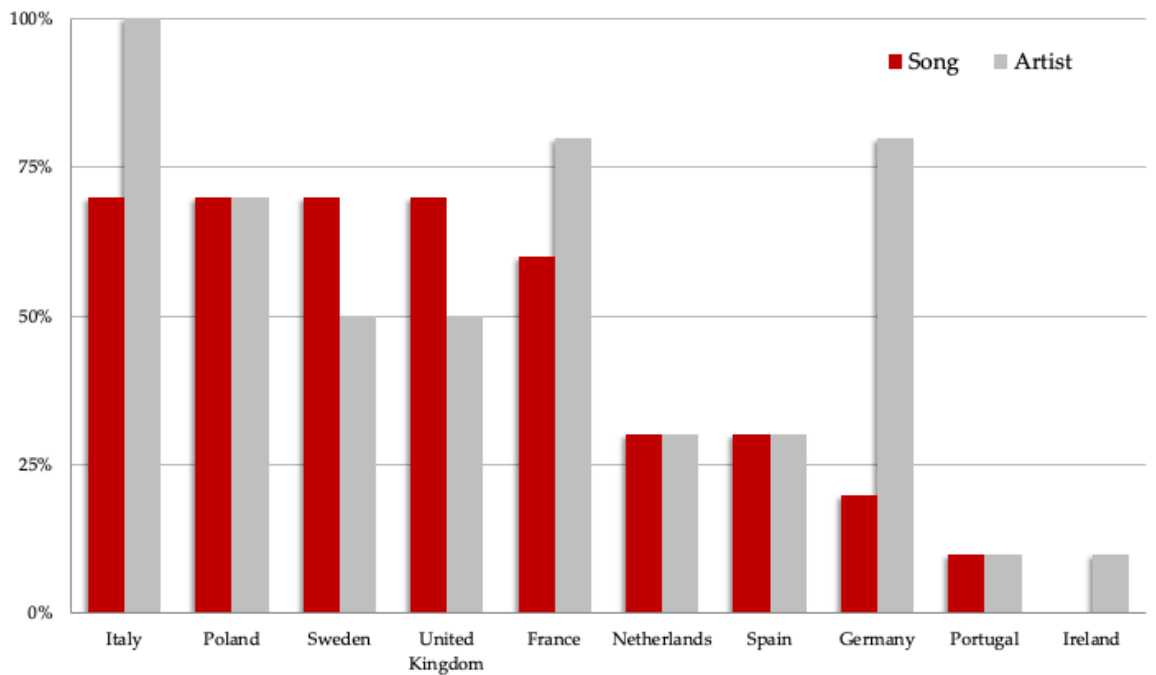
3. Results

Our results are presented in five sections: (i) a snapshot of the domestic share of the top 10 songs and artists in 2022 for each country; (ii) comparing the domestic share of top songs against historic benchmarks; (iii) extending the 2022 snapshot of top songs across top 40 and top 100; (iv) a country-by-country breakdown showing where each artist with a top 100 song in 2022 is from; and (v) the change from 2012 to 2022 in the presence of English language within each country's top 10 songs. In all five sections, we find strong evidence of glocalisation across the majority of these 10 European markets.

² We had to benchmark with IFPI data rather than Luminate data because global charts are a nascent phenomenon in the industry. In short, Luminate did not have consistent historical benchmarks.

The first exhibit offers a snapshot of the top 10 songs and artists from 2022. Ranked left-to-right in domestic dominance of songs, five of the European countries saw at least half of their top 10 artists and songs originating locally. Whilst Germany had only two domestic songs in its top 10, it had eight domestic artists. From this simple snapshot, it's clear that the larger European markets are experiencing stronger effects of glocalisation.

Domestic Share of Top 10 Songs and Artists 2022



Source: Luminate

We can also dig a little deeper into two examples where glocalisation was not present, to show why the aforementioned caveats of nationality and release schedule can distort the picture. In Spain, we see relatively few domestic acts and songs in the top 10, but Spanish-language songs dominate the Spanish chart like never before. Whilst Rosalía is the biggest Spanish artist from Spain, she's arguably overshadowed by Latin acts like Bad Bunny, Mauel Turizo and Shakira, among others. In the Netherlands, meanwhile, the success of Dutch language hip-hop is well known with rappers like Lil' Kleine, Boef and Ronnie Flex being household names in the 'lowlands'. Indeed, at one point in 2017, Drake was the biggest global act on Spotify, but the eighth biggest hip-hop act in the Netherlands, with the

'Glocalisation' of Music Streaming within and across Europe

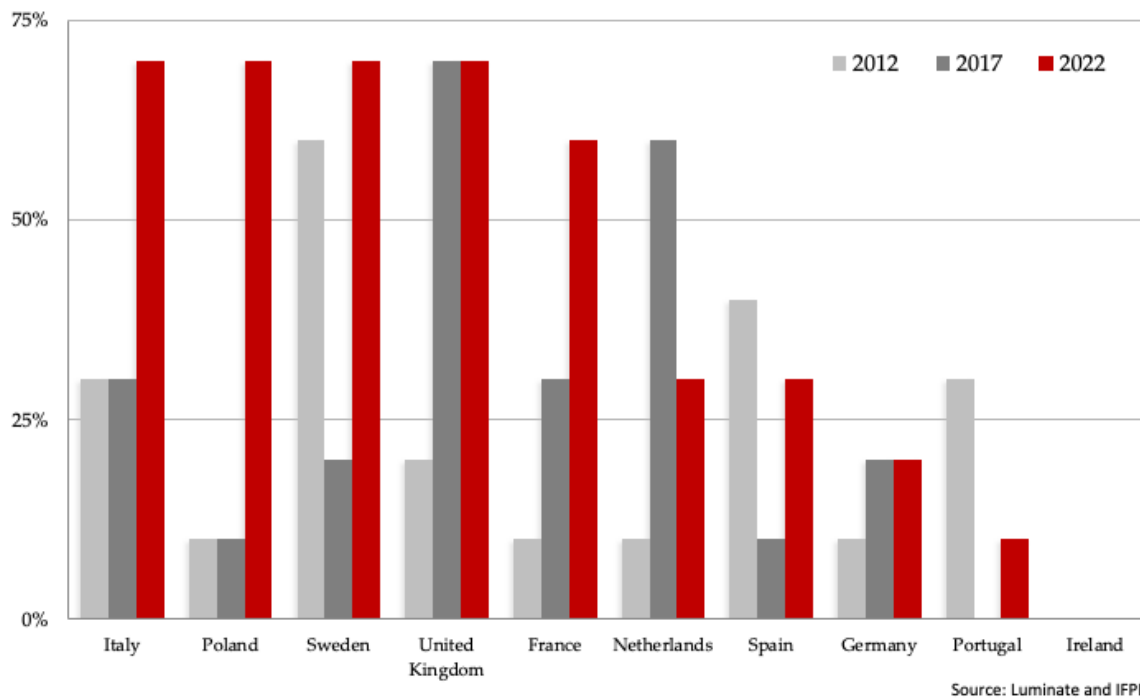
seven above him rapping in Dutch. However, the feast-famine of the release schedule meant there was little Dutch rap music topping the chart in 2022.

Looking next at changeover time, we find further evidence of the trend of glocalisation. As a reminder, this section compares the Luminate data from 2022 to IFPI-provided data from 2012 (when downloads on iTunes dominated the charts) and 2017 (when streaming was taking off).

A quick glance shows that the domestic share of the top 10 songs reached or matched its peak in eight of the ten markets in 2022. For a causal explanation, consider the match-making facility that streaming platforms provide. It's akin to a 'virtuous cycle': more subscribers equals more fans; more digital shelf space equals more bands; and arguably more investment by local labels means more of those local bands rise to the top of the charts.

That investment element requires unpacking as it's worth acknowledging how much has changed for record labels - in monetary terms - across this disruptive decade. In 2012, with CDs cratering and downloads failing to make up the difference, recorded music revenue stood at \$13.8bn. In the ten years that followed, they've almost doubled to \$26.2bn in 2022.

Domestic Share of Top 10 Songs over Time



Each country (and their respective creators and consumers) is distinct so we should be wary of generalisations when branding this trend 'glocalisation'. So, let's take a deep-dive on each country and broaden our observations to provide further insight into these trends both on-platform with streaming data from Luminate and off-platform with social trends from Chartmetric, which aggregates data from social media sites and services like Instagram, TikTok and YouTube. This enables a broader set of signals for dissecting the causes and consequences of glocalisation. First we will focus on the five distinct nations where glocalisation is most notable: Italy, Poland, Sweden, the United Kingdom and France.

- Italy: In 2012 and 2017, only 30% of the top 10 songs were made by Italian artists. In 2022, that rose to 70% with the top six songs all being Italian. The rise of Rohve, whose smash hit "Shakerando" took the number one spot, was heavily influenced by the global short-form video platform TikTok, which has taken pole-position for where new artists get recognised at home and abroad. To put this sudden rise of TikTok into context, Sensor Tower puts their monthly active users in Italy at almost twice that of Spotify - meaning if labels want to break local and global acts, they need to 'go fishing where the fish are' as Vanessa Bakewell once famously put it.

- Poland: Polish artists saw the largest benefits from glocalisation across our sample, rising from composing 10% of Poland's top 10 songs in 2012 to 70% in 2022. If we quickly broaden the lens to the top 100 data, a remarkably egalitarian picture emerges. Among the 42 Polish artists to perform a top 100 song in 2022, only seven had more than one track on the list, meaning the benefits of glocalisation are being felt by the many, not the few - contrary to what we would have predicted.
- Sweden: From ABBA to Max Martin, Sweden has a long, rich history of exporting pop music around the world (see "[Sustaining Sweden's Music Export Success](#)"). Nevertheless, the Swedes too have seen the benefits of streaming glocalisation. Whereas many local Swedish hits in 2012, like Swedish House Mafia's "Don't You Worry Child", Avicii's "Levels", and Loreen's "Euphoria" contained English lyrics, the hitmakers in 2022, like Jireel, Bolaget, and LOAM, are singing in the native tongue.
- United Kingdom: What really makes the UK's artists and tracks different from the rest is that of the seven British-made songs in 2022's top 10, the majority are old hits, often released at least three years ago and now given a second lease on life thanks to platforms like TikTok. Switching from songs to artists, a similar story of longevity emerges as none of the acts can be considered newcomers, as their careers span between six and forty-five years long. Britain's charts were an early adopter of streaming and learned the hard way about how one artist can dominate the charts. In 2017, for example, four of the top ten songs hailed from Ed Sheeran's album ÷. Indeed, in March of that year the Guardian newspaper ran the provocative headline: '[Ed Sheeran has 16 songs in the Top 20 – and it's a sign of how sick the charts are](#)'.
- France: Streaming has been an unexpected blessing for French music and French rap in particular. In 2012, there was only one French rap song in the top 10. By 2022, French artists like Ninho and PNL were superstars. All of the 6 French-origin tracks that made this year's top 10 were rap songs. As with Italy, these songs began their journey on TikTok which Sensor Tower puts ahead of Spotify in terms of monthly active users - reaching one third of the French addressable market. TikTok may not contribute to chart positions in any of these ten countries, but it is clearly contributing to cultural relevance.

Now, let's look at the five countries where the effects of glocalisation were less present, and what makes their domestic markets distinct.

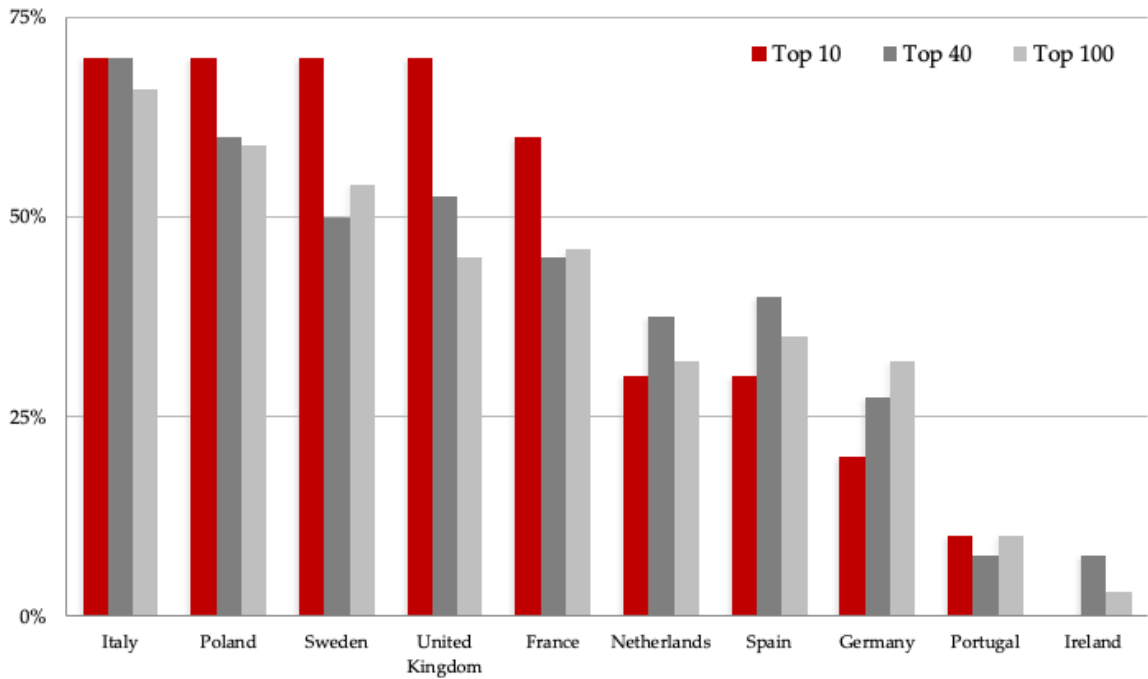
- Netherlands: As noted earlier, the Netherlands has a rich hip-hop tradition, but 2022 seemed to be a slow year for the Dutch scene. From peaks to troughs, the Dutch share of the top 10 songs improved from 10% in 2012 to 60% in 2017, but then fell back to 30% 2022. We suspect that if we had data from other years, the glocalisation effect in the Netherlands would be stronger. It is worth noting that the Netherlands is also home to several of the world's leading dance music labels. Although dance music titles rarely chart in the Netherlands, their artists tend to engage audiences on a global level. According to Chartmetric, 92% of current monthly listeners on Spotify for Armin van Buuren, DJ and co-founder of the Armada label, are outside of the Netherlands, reflecting the less localised nature of certain genres.
- Spain: In 2012 and 2017, 60% of Spain's top 10 songs had a lead artist from a Spanish-speaking country. By 2022, that increased to 90%. In short, Spain's glocalisation is focused more on language than region. Nevertheless, Spain still has a multitude of homegrown stars, like Rosalía and Morad. In the past it might reasonably have been expected that artists from Spain would be more likely to have been popular internationally than artists from Latin America. However, a quick glance at the current ranking of the world's 1,000 most popular artists on Chartmetric shows 9 from Spain, compared to 20 from Colombia alone.
- Germany: While glocalisation effects in the German top 10 songs are muted, they are much stronger at the artist level. In 2022, 80% of the top 10 artists on the German charts were German. Nigel Elderton, a veteran music publisher of peermusic argues that the German artist chart is possibly one of the best barometers of this change: "Twenty years ago the top artists were almost a carbon copy of the UK and US chart; now it is populated almost completely by local acts". In common with artists from Japan, the second largest recorded music market according to IFPI, German artists have historically struggled to reach international audiences. Language undoubtedly plays a significant role in this, as will the locally distinct genres of Schlager and German hip-hop.

- Portugal: Here, we see a similar trend to Spain. In 2012, 30% of the top 10 songs were by artists from Portuguese speaking countries (e.g., Portugal, Brazil, São Tomé and Príncipe). In 2017, 0% were. Then in 2022, 50% were. This trend holds as we look at 2022's top 100 songs: 44% were by artists from countries where Portuguese is the official language. As with Spanish-speaking artists, the global consumption of Portuguese-speaking artists is currently dominated by artists from Brazil. At present there are no artists from Portugal in Chartmetric's top 1,000 artist ranking, whereas 28 Brazilian artists are featured.
- Ireland: This is the only country in our sample that seems impervious to streaming's glocalisation effect, as Irish artists had 0% of the top 10 songs in their own charts across all three years studied. In fact, only 3 songs across Ireland's top 100 in 2022 were by Irish artists. A quick crash course in how the industry operates helps explain why this has happened. Ireland operates as a vassal state to the United Kingdom (and London-centric) music industry. For example, many of the most successful artists from Ireland - Hozier currently trump's U2 thanks to the power of TikTok - have historically signed agreements with UK registered record companies.

Why is this happening? Local language, musical legacy and genre specialisms appear to be significant factors. But we shouldn't be naive to why some art stands above a crowd: the ability to write, perform, record and market a hit. And hits don't hang off trees, either. The role of the songwriter(s), publisher(s), manager(s), producer(s), engineer(s) and record label executive(s) - all of which may come from different countries - will often stake a claim as to why it successfully scaled up the charts, hence the adage 'where there's a hit there's a writ'.

We can now broaden the lens and look beyond the top 10 songs and travel a little further down the long tail to expand our chart horizon to the top 40 and top 100. Here we can see that the local presence (red bar) declines significantly as we increase the size of the chart. For countries like the UK and France, the domestic share goes from the majority to the minority when you move the lens away from the top ten and towards the top 100.

Domestic Share of Top 10, 40 and 100 Songs 2022



Source: Luminate

Dissecting the makeup of these top 100s shows that the United States still holds cultural sway on each of these country’s charts. In all but Spain and Ireland, songs by artists from the United States hold the second most spots on the top 100. In Spain, the US ranks fifth behind Spain, Puerto Rico (itself a territory of the US), Colombia, and Argentina. In Ireland, the United States ranks first.

We can unpack this top 100 chart further by presenting this grid which matches the breakdown of the nation of origin for each country’s chart. Note that the top three home countries are highlighted in red for each chart, so when an item is boxed, it shows the home country is the same as the chart country (i.e., Italian artist charting in Italy). In addition to the countries already discussed, one can spot Nigeria and Puerto Rico on the grid thanks to globally recognized genres like afrobeats and reggaeton.

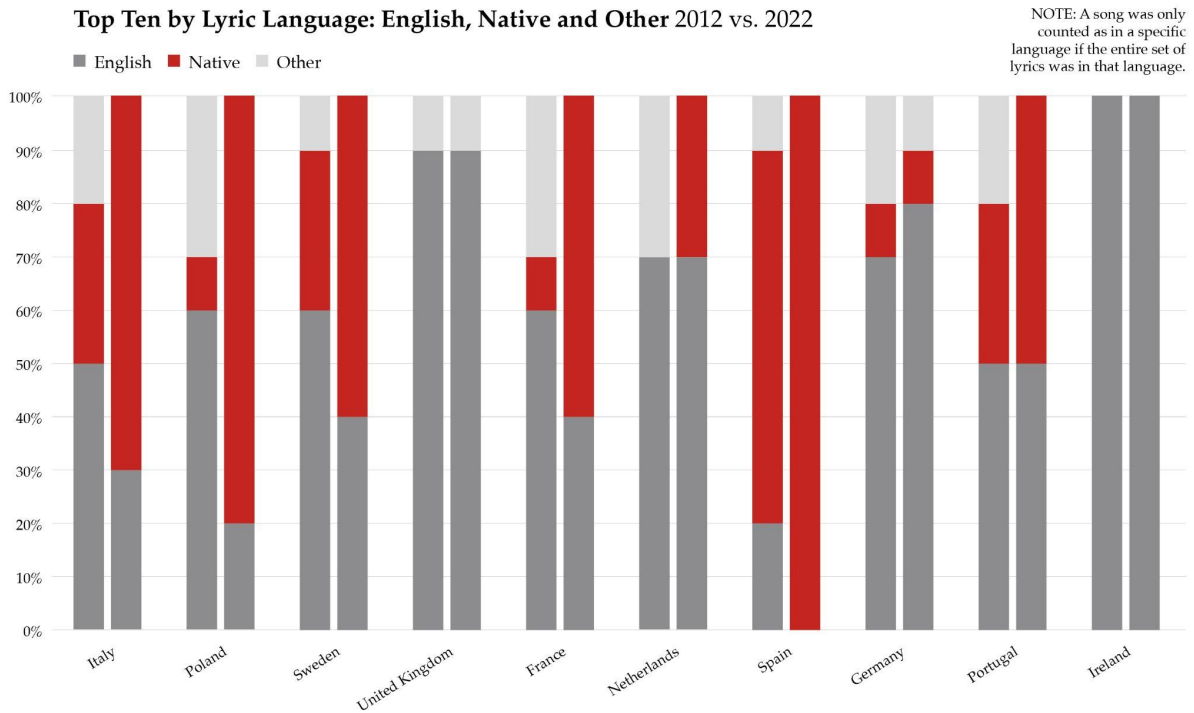
'Glocalisation' of Music Streaming within and across Europe

| | | 2022 Top 100 Songs (Source: Luminate) | | | | | | | | | |
|---------------------|----------------|---------------------------------------|--------|--------|----------------|--------|-------------|-------|---------|----------|---------|
| Country Chart → | | Italy | Poland | Sweden | United Kingdom | France | Netherlands | Spain | Germany | Portugal | Ireland |
| Artist Home Country | United States | 11% | 17% | 13% | 34% | 16% | 24% | 6% | 30% | 20% | 40% |
| | Australia | 2% | 2% | 2% | 4% | 2% | 3% | 1% | 5% | 2% | 3% |
| | Argentina | 1% | 0% | 0% | 0% | 0% | 0% | 9% | 0% | 0% | 0% |
| | Belgium | 1% | 0% | 1% | 1% | 5% | 3% | 0% | 1% | 1% | 1% |
| | Brazil | 0% | 0% | 0% | 0% | 1% | 0% | 1% | 1% | 31% | 0% |
| | Canada | 0% | 2% | 3% | 6% | 2% | 5% | 0% | 2% | 2% | 6% |
| | Colombia | 1% | 1% | 1% | 1% | 1% | 1% | 10% | 1% | 1% | 1% |
| | France | 2% | 4% | 1% | 2% | 46% | 3% | 0% | 3% | 2% | 2% |
| | Germany | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 32% | 1% | 0% |
| | Ireland | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 3% |
| | Italy | 66% | 0% | 2% | 1% | 1% | 3% | 1% | 1% | 2% | 1% |
| | Netherlands | 1% | 3% | 2% | 2% | 1% | 32% | 1% | 2% | 1% | 2% |
| | Nigeria | 1% | 0% | 1% | 4% | 5% | 5% | 1% | 2% | 2% | 2% |
| | Poland | 0% | 59% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| | Portugal | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 10% | 0% |
| | Puerto Rico | 3% | 2% | 2% | 0% | 2% | 1% | 27% | 2% | 3% | 0% |
| | Spain | 1% | 0% | 0% | 0% | 2% | 0% | 35% | 0% | 4% | 0% |
| | Sweden | 0% | 0% | 54% | 0% | 1% | 2% | 0% | 1% | 0% | 0% |
| | United Kingdom | 8% | 9% | 13% | 45% | 12% | 16% | 5% | 14% | 12% | 38% |
| | Other | 2% | 1% | 5% | 0% | 3% | 2% | 3% | 3% | 6% | 1% |

Source: Luminate, Gracenote

Let's now turn our attention to the linguistic effects of glocalisation by quickly returning to our top 10 songs and looking at the change in prominence of the English language from the download-driven chart of 2012 to the streaming-led chart of 2022. Contrary to the fears over music's homogenisation on global streaming platforms, the data suggests the opposite. English language share of their top 10 markets (red bars) have shrunk between 2012 and 2022 in five countries: Italy, Poland, Sweden, France and Spain. The only country to have shown a slight increase is Germany - everywhere else was constant. The flip side is that many of these countries now see a large percentage of their top 10 in their native tongue (grey bars). For example, in 2012 there was one song in Poland's top 10 with lyrics in Polish. In 2022, 8 of 10 were in Polish. Ditto Sweden. As streaming goes global, local artists performing in their local language become more 'vocal'³.

³ An interesting precursor to this can be found in gaming with the launch of SingStar ('Karaoke Challenge') on the Sony Playstation in 2004. Chris Deering, former President of Sony Computer Entertainment recalls that the Swedish disc on SingStar sold better in Sweden than any English curated alternative. Consumers were able to exercise choice with interactive gaming content in a way that wasn't yet available in music.



Source: Luminate, Gracenote and authors' own inspection

Taking stock, the findings at least partially alleviate William Ivey’s concern quoted atop this paper that recorded music would inevitably lead to a “flattening out of local musical cultures.” Conversely, the data demonstrate that even though musical exports from the United States are still important across Europe, streaming has helped local artists reach more of their fellow citizens, and more often than not, in their local language. Without these benefits, an Italian rock band like Pinguini Tattici Nucleari might have never had a chance to capture the ears of a nation, like they did when they were Italy’s top artist in 2022.

These cultural trading patterns merit further academic attention, especially when you broaden the media format beyond music into other formats like gaming, podcasts, books, and video. Indeed, despite our finding that Spain’s glocalisation is more linguistic than national, it is notable, albeit beyond the scope of this paper, that we see the opposite flow of influence in film and television, where Spain has become a prominent exporter.

How Spain and Latin America might trade eyes for ears

The Netflix Spanish hit original drama *La Casa de Papel* (*Money Heist*) has been running for five seasons since 2017. Remarkably, it was close to being cancelled after its first series on the domestic broadcaster Antena 3, only to be salvaged by Netflix - proving to be their smartest gamble to date.

By 2021, *Money Heist* had become a Spanish cultural export success. According to Netflix, *Money Heist* is their most viewed program in France, Italy, Argentina, Chile, Brazil, and Portugal. The series also has a significant fanbases in North Africa, the Middle East, and Turkey.

It's not alone. Since 2020 Netflix has made a huge investment in the 22,000 square metre 'Madrid Content City', the largest of its kind in Europe. The global hits have followed: teen drama *Élite* (2018 – present), period drama *Las Chicas del Cable* (2017-2020) and the brilliant *Contratiempo* (2016).

Spain's cinematic role is set to continue. The Spanish Government recently 'crowded in' a further €1.6bn of its own money to boost its film and television output by a third. Latin audiences will be key, so we may see eye-content trading from Spain to Latin America, and ear-content travels in reverse.

The famous Spaghetti Westerns of the 60's and 70's were shot in the Tabernas Desert, or 'Hollywood in Almería' in the South coast of Spain. Thanks to the impressive work of the Spanish government and Netflix, it may not be deserted for long.

4. Interpretation

We began this study assuming the world had flattened under the pressure of globalisation. To the contrary, there is ample evidence that local markets are thriving on global platforms. Why is this? What are the causes and consequences of our so-called glocalisation? We now explore how the forces of supply and demand play a role.

On the supply side, the format shift from physical to digital matters. In the CD-age, there were fixed-and-marginal costs associated with music production and distribution, which made the economies of scale from global hits relatively more profitable, and the costs of developing domestic niche-hits relatively more prohibitive.

Streaming changed those economics, slashing the costs of production and distribution, and making local music within global labels more profitable to invest in. Consider travel. Scaling local hits offers a more favourable return on investment than global, as logistical costs like travel and touring are reduced. Add on top the impact (and fallout) of the pandemic, where global tours were cancelled for two years, and we may have an unintended reset in how global firms now prioritise their local resources.

Accentuating this incentive is the abundance of consumption analytics that streaming services provide to labels, who can see what's been consumed in each market and act on it. As told in the co-author's book 'Tarzan Economics' (retitled 'Pivot'), twenty years ago when compact disc sales were scaling new heights (and doing so at ever higher prices), record- industry executives would regularly buy and sell stacks of CDs based on their weight of pallet. There's little data science in trading a cultural good by its weight. That was then, this is now. If a song gains traction on streaming platforms, Spotify knows immediately who, where, when and why those streams took place. Letting go of the old vine of transactional data and embracing the new vine of consumption analytics changes everything.

Keeping with the supply side, market size clearly matters too. Local labels, publishers, and streaming platforms will be well resourced in markets like Germany but less prevalent in German-speaking countries like Austria and Switzerland, meaning if you're a non-English market with a bigger neighbour that shares your mother tongue, expect to be deprioritized. The same holds for France and its French-speaking neighbours Belgium and Luxembourg, along with the UK and neighbouring Ireland.

The relationship dynamics between global record labels and publishers and their local subsidiaries also plays a role in the causes and consequences of glocalisation. Major and indie labels will typically shortlist a few artists and tracks each month for global marketing priority, irrespective of where the repertoire comes from. Local companies will be directed from their global headquarters to prioritise these tracks and artists in addition to their own local artists. However, a peculiarity emerges when you look across the twelve months as there's very limited global artist-rotation: rarely are more than 10 artists a year being granted preferential treatment. Comparatively speaking, these global short lists are incredibly short relative to the local explosion of artists and tracks being put on the digital shelf every day and risk 'getting lost in the long grass' of unlimited choice.

For better or worse, these supply side forces directly affect the playlist curation of music by digital services. Nationalistic editorial tendencies by the streaming platforms are often at odds with the 'global citizen' approach to music discovery, according to Hagar Graiser, South African music lead at Platoon, an artist services company. She argues that consumer charts rarely resemble the streaming platforms' editorial selections - suggesting we want to be more global than our curated playlists seem to believe. Graiser further suggests that risk aversion by marketers may accentuate glocalisation, as they overspend on domestic artists winning at home rather than gambling on them competing abroad.

If we switch from supply to demand-side considerations, what's evidently clear is that power over what content we chose to listen to has been devolved away from linear, 'one to many' broadcast models like radio and television (where you get what you're given) and empowered the consumer with interactive on-demand streaming (where you choose what you want). This power-shift means that European consumers know what they want better than their old-linear counterparts, and vote with their attention.

Indeed, the consumer may exercise more power over choice than the algorithmic playlists that are driven by the platform would have you believe. Hidden in the back pages of a recent United Kingdom Competition and Markets Authority Market Study Update, a table appeared that challenged the prevailing logic that power and influence rests with the editors and algorithms behind the playlists. This analysis found that the percentage of streams on Spotify and Apple that were deemed either Editorial or Algotorial fell between 15% and 30%. Far more important were ‘user created’ playlists and ‘non playlists’ which, on Spotify and Apple, made up between 60% and 80% of streams in the UK⁴.

Table 3.11: Streams on playlist type as a % of UK streams by music streaming service in 2021

| | <i>Spotify</i> | <i>YouTube Music</i> | <i>Apple</i> | <i>Amazon</i> |
|----------------|----------------|----------------------|--------------|---------------|
| Editorial | [5-10]% | [5-10]% | [10-20]% | [10-20]% |
| Algotorial | [10-20]% | [30-40]% | [5-10]% | [5-10]% |
| Station/ radio | [0-5]% | [0-5]% | [0-5]% | [20-30]% |
| Autoplay | [5-10]% | [0-5]% | [5-10]% | [5-10]% |
| User curated | [50-60]% | [10-20]% | [20-30]% | [10-20]% |
| Non-playlist | [10-20]% | [40-50]% | [40-50]% | [40-50]% |

Source: CMA analysis of data from music streaming services.

This all points to a growing marketplace where power has been devolved from global record labels and streaming platforms to their local offices and from old linear broadcast models to new models of streaming which empower consumers with choice. This challenges the borders that define markets: perhaps songs and artists are increasingly local, but genres are increasingly global. Put another way, global superstars no longer ‘own’ the genre that they represent – anyone anywhere can perform in said genre style, or in hybrids. Nor do broadcasters own what consumers get to hear. Increasingly, it seems, playlists are without borders and consumers are broadcasters. These forces of supply and demand are by no means the whole story, and there are plenty more rabbit holes yet to explore.

⁴ The table is a reprint from the original study but the title is misleading. It's all streams on a DSP, meaning the confusing term ‘Non-playlist’ is meant to encompass all the "lean forward" listening choices such as search results, album / artist / single page etc.

Why, for instance, does a relatively small music market like Poland see such strong evidence of glocalisation? Anna Gruszka, a Polish executive at Twitch, points to the country's political history where western music was banned during the Cold War, so local repertoire became an intimate and inward form of expression. Why, indeed, does rap music (and hip-hop culture) become the catalyst for glocalisation in so many of the markets studied here? Is it that artists are becoming localised whereas music itself is becoming globalised? More specifically, Polish charts are dominated by Polish artists, but all of those artists are performing music imported from the United States. Perhaps it's in the cultural meaning behind this music: rap is something you do, but hip-hop is something you live.

Let this paper be the catalyst for exploring such rabbit holes in future research. What the present interpretation does is give the roadmap for replicating similar analysis in other media formats. Across media, a key question persists: when global supply-side decisions are devolved to local divisions, and demand-side decisions are being made by empowered consumers, will we see similar trends in glocalisation play out in television, gaming, podcasts and books? Someone whose unique job is to read across all these media verticals is Steve Boom, VP, Audio, Twitch & Games at Amazon. He concludes that "this [glocalisation trend] seems consistent with the broader societal trend that as we become more global, we are also becoming more tribal".

4. Conclusion

Contrary to William Ivey's concerns, we've learned that this newly digitised world isn't flat. So now what? For creators, consumers, and companies alike, one can envisage a flywheel effect where more domestic success by creators begets more domestic investment by global labels, which in turn drives more demand from consumers. This is to be broadly welcomed but spare a thought for English-speaking markets who traditionally had a comparative advantage in exporting their music abroad. Thanks to the success of glocalisation, they are now struggling to get their English-language repertoire heard overseas.

The latest findings from the IFPI's 2023 Global Music Report puts more wind into the sail of glocalisation, noting 'there was also an acceleration in the popularity of local repertoire in 2022, a trend that has become more prevalent as streaming has grown to be the largest global format by revenue'. Across 53 official national single charts overseen or monitored by IFPI, artists local to that market took the top spot in 27 markets. Universal Music Group's Adam Granite went further, noting "if you look at the top 10 artists in the world in 2022, they are from seven different countries' - proof, if needed, that the 'g' in globalisation is real.

Ralph Simon, Founder and Chief Executive of Mobilium Global, notes that it won't just be the global media companies that will need to reposition and reallocate critical creative resources away from their global HQ's to their local operating territories due to the 'unyielding effects across the board of glocalisation'. Simon argues, "The deep and pertinent worlds of branding and targeted marketing will feel the same headwinds". This merits consideration. Recall Say's Law, which states that supply creates its own demand: if those global marketing-and-branding budgets are supplied to local offices, demand for local content will only increase further.

The ramifications of glocalisation are most felt by policy makers, as this politically desirable phenomenon across the ten European markets studied has been achieved with very little policy intervention. Markets like music and video streaming are largely unregulated, much unlike their linear counterparts of radio and television. Ironically, it's these unregulated markets which have achieved what intervention in regulated markets failed: domestic prominence. Firms have devolved corporate power from global headquarters to local offices, whereas consumers are empowered to make their choices instead of regulated broadcasters choosing for them. Markets have achieved what governments would have wanted, without government interference, leading to a thorny question to sign off with: if governments started regulating these markets, would glocalisation go in reverse?

About the Authors

Will Page is the author of the critically acclaimed book [Tarzan Economics](#), which has been translated into five languages and published in paperback with its new title Pivot. As the former Chief Economist of [Spotify](#) and [PRS for Music](#) he pioneered Rockonomics. At PRS he published work on [Radiohead's 'In Rainbows'](#) and saved [BBC 6Music](#). At Spotify he uncovered the [anatomy of a hit](#) and articulated the [global value of music copyright](#). A passionate [communicator](#), Will's is a regular contributor to the [Financial Times](#), [Billboard](#) and [The Economist](#). Will's first break into music was penning articles for [Straight no Chaser](#) magazine, and his DJ sets continue to [top the global charts on MixCloud](#). He co-presents the [Bubble Trouble podcast](#) and is a fellow at the [London School of Economics European Institute](#), [Edinburgh Futures Institute](#) and the [Royal Society of the Arts](#).

Chris Dalla Riva is a musician who works at Audiomack, a popular music streaming service. He was Audiomack's first data analyst and subsequently first product manager focused specifically on data and personalization. In this role, he helped integrate algorithmic recommendations throughout their app and website. Outside of work, he talks regularly about the intersection of music and data to hundreds of thousands of subscribers across [Substack](#) and [TikTok](#). His work has set off a viral internet debate about [the decline of key changes in popular music](#) and has been spotlighted by [NPR](#) and [The Economist](#). You can hear his latest EP, [You Know I Can Be Dramatic](#), wherever you stream music.

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