Music consumption in Spain: From analogue to digital in the shaping of music

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Abstract
This paper analyses the relationship between the types of music consumed on Internet and the thought leaders for this new digital consumption: i.e. the social agents or new mediators that influence consumption. Mass consumption is determined by traditional mass media such as the press, radio and television since they are very effective marketing tools. The Internet reinforces the presence of mass consumption products, in fact, data relating to so-called "long tail" music consumption shows that the majority of cultural consumption is increasingly concentrated on the top ten lists. Nevertheless, the media's role has gradually begun to lose steam and is being substituted by recommendation systems and/or the rise of new on line agents. To support this analysis, we carried out a comparative study of 50 of the most listened songs via streaming, radio, physically or digitally purchased or illegally downloaded.

Keywords: Music industry, music consumption, new opinion leaders, mediators, music market

1 Introduction

In recent years, recorded music sales in Spain nosedived with revenues between 2003 and 2014 dropping from €530m to €149.9m. Digital music sales in online shops have not been successful either, totalling just €63m

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in 2014, even though online music consumption has increased, albeit outside of commercial channels via alternative methods and systems.

Taking account of all the venues and players that participate in the broad and complex web of creation, dissemination, and consumption, music is currently one of the most widespread cultural products both in terms of its reach and presence in society. From creation and live performance to reproduction and dissemination through multiple traditional channels – such as radio, records, television, the cinema, advertising, dance halls, nightclubs and live performances, new systems and channels as well as the new digital social networks, and the various public and private venues of creation and consumption, music is an omnipresent cultural product.

Clearly, music is currently a means of expression and communication and an essential cultural product that comprises a major part of the daily entertainment diet. The same conclusion can also be reached if we take account of its economic contribution, as a directly consumed cultural product or an element for producing other products, works and cultural expressions embracing a wide spectrum of the overall economy (KEA 2006; APRA 2011).

In Spain, music consumption habits differ little to the rest of the world but, consumption, audiences and measurement systems are changing (Napoli 2011). The habitual daily listening to music has increased substantially and music is always present among the leisure pursuits of the Spanish population. Indeed it has become the only artistic manifestation that accompanies, to a greater or lesser extent, the daily activities of two-thirds of Spaniards.

Various reports and statistics indicate that more music than ever is being produced and consumed worldwide, especially via Internet dissemination (IFPI 2013, 2014). In this new digital context, the question of what types of music people listen to on the Internet and the influence of the new mediators that contribute to shape the musical tastes of the majorities has become even more relevant.

In order to answer this question we must examine an old issue that can be traced back to the beginnings of sociological research on cultural consumption namely the complex and unresolved relationship between mainstream and subculture consumption and the difficulties associated with researching and representing the latter. Generalisations of individual social behaviour and cultural habits are unrealistic and it is almost impossible to sum up the complex diversity of different individual or collective patterns of cultural creation and consumption. In fact, even the term "social", according to one of the first sociologists, Gabriel Tarde, is a mere abstraction of something we cannot truly measure, since it implies situations outside of a social context (Tarde 1890).

Starting from the problem of representing the consumption patterns of individuals or subcultures, it becomes difficult to demonstrate that the cultural supply determines demand, in other words that the record companies determine consumers' musical tastes or that labels produce what people want to listen to. In relation to music consumption, indetermination and randomness are key factors and therefore labels organisational strategies aimed at meeting music demand often fail because of the impossibility of aggregating the individual complexity, inherent in cultural consumption, into a supposed generalisation (Calvi 2010).

Nonetheless, today's digital networks offer a privileged place for observation and research on the development of these new music consumption behaviours, which have moved beyond the traditional industry and markets. In classic analyses of communication, it is assumed that cultural products disseminated by cultural industries and companies impose a more or less homogeneous supply on a broad public, which consumes the same contents at the same time, which tends to standardise and smooth out the habits and tastes of cultural consumption. Nevertheless, there is evidence of new possibilities and modalities of music creation, dissemination and consumption, which are much, more complex than those studied until now (Sterne 2014; Calvi 2014).

The new digital paradigm is pushing creators and consumers to converge: *"Custom playlists, loop sampling, re-mixing, and audio editing software in general provide tools which blur the distinction between the artist who creates the music and the user, who once passively consumed* *it"* (Hughes & Reiner 2003: 186). This is also in a context of social networks that are using musicians to promote themselves (Salo et al. 2013; Jetto 2014). Within this new musical consumption scenario it is imperative to take account of the role played by digital mediators and opinion leaders willing to participate, recommend, and share.

In this report, we analyse the mediators and thought leaders of the music sector, as well as market data and consumption habits in Spain. Thereafter, we compare the music most listened to via a subscription service such as Spotify with the music with the most physical sales in the Spanish market.

2 Music mediators and opinion leaders

Music is a mean of expression and of interpersonal relationships "par excellence" in all cultures and has been throughout the history of mankind across all cultures and throughout time and has been studied from broad perspectives in terms of its role in social mediation. For example, German sociologist Georg Simmel, in early sociological research on culture, already considered music to be the expression of the "substance of society", a fundamental element of interpersonal social relationships, a form of relationships between individuals, and a model of communication that maintains, structures, and restructures human relations. Thus, he considered music in the broad context of social relations namely. Integrating it into the processes of social communication or from the same perspective contemplated by many contemporary theorists of sociology of culture and art (Simmel 1968; Bourdieu 2002).

Along the same lines as the cultural sociologist P. Bourdieu, A. Hennion aims to reveal more completely the complex framework of social mediations and the role that mediators play between the processes of music creation and music listening. In his words, *"regarding the confrontation between an object of aesthetic admiration and a subject worried about attributing the source of its beauty to its respective qualities, it is sufficient to substitute it for the multitude of hidden mediators which are solely capable of making this relationship possible, from the environ-*

ment, the institution and the market to the critics, tastes and social differentiation". This means for a large segment of contemporary cultural sociology, music has *"become the ideal art for providing the sociologist with an exuberant display of the heavyweight fabric of heterogeneous mediations ... Sociological approaches to the work of art have branched out into highly diverse directions, a common effect of restitution of intermediaries of all sorts - human, institutional, and material - through which the relationship between art and the public passes (academies, art patrons, collectors, critics, fashion, means of communication, etc.)."* (Hennion 2002: 16-17).

As a result, carrying out a study of the complex world of mediations in the music field entails taking an extensive journey through all of the possible opinion leaders, who mediate, between music creation and the listening of that music. These players could range, in no particular order, – from the family, to an immediate social group such as friends or significant others, the education system, the economy revolving around musical activities, and, later, the music industry and the means of communication, new media and digital social networks and, finally, what might be called the cultural system as a whole (Hennion 2002; Sterne 2014; Calvi 2014).

Among mediators, the music industry has played a fundamental role as an opinion leader of mainstream musical tastes and consumption, mainly through records. Along these lines, the role played by the recording industry, as is the case of almost all 20th century popular music, is substantial. It is impossible to imagine the development of the different musical genres and languages of the past century without the mediation of the record and the recording companies as the main support for recording and transmission of music (Negus 2005). Nevertheless, the role of the recording industry as a system of production, distribution and sales of music on a mass scale should be specifically analysed in the context of each particular music genre. The recording industry operates fully within mass consumption genres such as rock and pop music, while it plays an indirect role in minority genres such as jazz or classical music. For example, the roots of jazz are pre-industrial and not originally associated with a commercial model. The economy of jazz was primarily developed by live music performances with records acting more as a cover letter for artists, meaning jazz musicians did not make a living via selling records alone. The relationship between record companies and jazz is not as direct as with the rock and pop, genres that are directly coordinated with the industry itself, but rather there is a wide range of models that are difficult to fully pigeonhole from a commercial standpoint.

A lot of classic research regarding the music industry is coloured by certain clichés. An interesting hypothesis to develop, contrary to the majority of studies on the recording industry, is the one that explains how some of the most important innovations in a musical genre can take place within well-established recording companies which belong to large communication groups: i.e. at the heart of the dominant cultural system.

The record, the greatest mediating means of support for popular music throughout the 20th century, would not have managed to have the impact it had without radio. The main channel for mass dissemination of records, since the early decades of the 20th century, has been radio, the usual means of communication for popular music. Commercial radio stations belonging to large multimedia conglomerates have historically tended to disseminate the most successful artists.

Nevertheless, it cannot be directly deduced that mass media has been and is the determinant of musical tastes and of what audiences listen to. The great mediator, the so-called media operates mainly as enhancers of the social logic of "gregarious" cultural consumption: i.e. the tendency of human beings in community to imitate the behaviour of others, the propensity to consume what is perceived to be the consumption of "the majority", starting with the family, the closest social interaction group, and ending with what is established as mainstream by mass means of communication.

In short, the entire web of industrial means of communication of music heads in the same direction, underpinned by the commercial logic of the rock and pop industry: i.e. focused on the commercial management of those musicians with the greatest probability of satisfying the tastes of what is considered to be the "majority" by producers, although real innovations in musical genres are often disseminated via other venues. In fact, as pointed out by some authors, *"The major corporations still retain crucial control over the marketing and promotion that will largely determine what music most consumers get to hear and know about"* (Hesmondhalgh 2013a: 344). Even though the Internet promotes individualisation of consumption via the so-called "mass-self-communication" or "networking media", the traditional means of communication and the power of large global entertainment business conglomerates still have a greater weight shaping musical consumption tastes.

With the development and emergence of new digital means of communication, such as the Internet, social networks and new music broadcasting channels, a major disruption in the rationale underpinning the operating modes of the entire cultural industries took place. Every cultural production sector, from music to recording companies and radio to the publishing industry and to audio-visual conglomerates, have entered a restructuring phase with an uncertain outcome.

Specifically with music, this new situation, in theory, could lead to greater specialisation of audiences due to an increasing diversity of music artists and genres available in the digital networks. Never before in the history of music has it been possible to access so much music so quickly from all over the world.

Musical consumption habits are much more diverse and complex than indicated by reports and statistics. The most interesting aspect is to observe how users can seek experiences involving access to music and satisfaction of their musical consumption needs and companies aim to profit from these new habits. Our main hypothesis suggests that new music mediators and thought leaders on the Internet tend to promote the same products already listened to and consumed in the traditional music market dominated by the established mediators, namely the large recording companies and mass communication media.

The main underlying forces are the social rationales of imitation and repetition of musical consumption habits, where users tend to consume what is seen as mainstream consumption, not only as projected by media but also through contacts with and mouth-to-mouth recommendations of peers and social groups. Music consumption thereby takes on the characteristics of a viral contagion rationale where what is most listened to, is what is most recommended, which, in turn, is also what is most consumed both on the Internet and in the traditional cultural consumption markets.

The cyber-utopia of a music economy based on the mutual collaboration of users of new social networks is open to question. The cultural and musical competence of "thought leader peers" via new platforms for listening to music show that what is most recommended are the same products marketed by the large recording companies.

3 Consumption and markets

The consumption of music is embedded in leisure for people living in Spain. Consumption and markets appear to be two united variables, but with the development of the Internet and the proliferation of music reproduction devices, these ideas are less fixed. The market is linked to a supply and demand rationale and at a price per transaction, yet. Consumption can be about many types of listening without the consumer needing to pay. For example, a large portion of music consumption via Peer-to-Peer (P2P) networks take place outside of the market. However, the emergence of the Internet is modifying these concepts and a "new form of capitalism" is appearing" (Ritzer & Jurgenson 2010: 32).

From a historical perspective, the current paradigm shift is similar to others that occurred during the past century, not only in the ways of creating music, but in the production and music innovation (Tschmuck 2012). In the old model of production-distribution music, record companies kept a tight grip and there was a low level of connectivity between the companies themselves. Following the emergence of the Internet, *"the new music dynamics is characterized by high connectivity and little control"* (Wikstrom 2009: 6). The music on the Internet is perceived more as a service rather than a product. And this radical paradigm shift in the music industry has broken the traditional business model, so that the new model will still take a few years to set, and it will be shaped by *"four variables: media presence, audience reach, audience approval and audience action"* (Wikstrom 2009: 86).

The digital environment has significantly changed the music industry and consumption in Spain.

According to the Ministry of Culture (MCU, 2011), 64.8 percent of the Spanish population listen to music daily, 79.8 percent at least once a week, over 83.7 percent at least once per quarter, and 84.4 percent at least once per year, followed by reading (58.7 percent) and cinema (49 percent). Males listen to music more frequently than females but the greatest differences are by age. This gives us an idea of the importance of music relative to the Spanish population's leisure activities.

In spite of the development of the Internet and portable music players, the radio is still the most frequent means of listening to music (used by 80.7 percent of the population), followed by media such as CDs or DVDs (32.4 percent). 22.8 percent of the population tends to listen to music on a computer or using devices connected to a computer and 9.8 percent using their mobile phone. Regarding where they tend to listen to music, 83.3 percent do so at home, 43.6 percent in the car, 16.8 percent at work, and 6.2 percent while using public transportation.

According to data from the Ministry of Culture report, the preferred musical genres of people who normally listen to music at least once per quarter are primarily Spanish pop-rock (58.2 percent of the population), foreign pop-rock (39.2 percent), Latin pop-rock (35 percent), melodic songs (33.9 percent), singers-songwriters (31.6 percent), flamenco (21.5 percent) and classical music (16.1 percent).

Of all of the cultural industries, the market, which has declined the most in recent years, is the music sector. According to the sector industry association (Promusicae 2014), between the years 2001 and 2014, sales of recorded music decreased in value from €626.0m to €149.9m or a drop of -76 percent (figure 1). This sharp downturn is due primarily to the influence of the Internet and, to a lesser extent, to the economic crisis. The Internet has been a disruptive technology for the music industry and it is yet to be seen if, in the future, it can become a sales channel or merely a network for the dissemination of music similar to other telecommunications networks such as the radio.

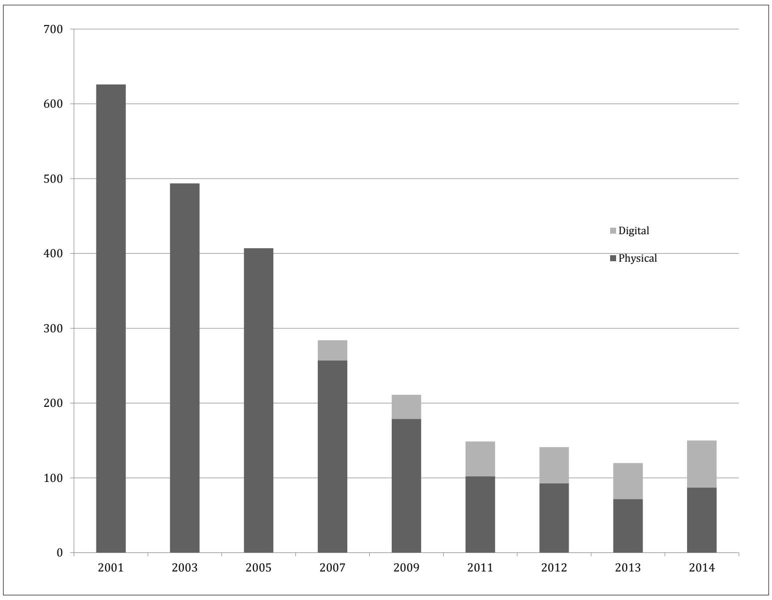

Figure 1: Music market development in Spain (2001-2014) in millions of Euros (Source: Promusicae 2014)

According to the latest report from Promusicae, Spanish people spent €62.9m on the digital format in 2014, over than 26 percent for the last four years, showing a modest recovery for the music industry sector (Promusicae 2015). The damage caused by piracy has been considerable although it is not regarded as damaging by most users of non-legal music platforms. Some studies even show that illegal music consumption may lead to greater consumption from legal platforms. (Aguiar & Martens 2013). Other reports indicate that during 2014 1,831,000 albums, with a market value of €6.773m (www.lacoalicion.es) were illegally accessed.

Hopes that the digital market would gradually expand and fully offset the physical sales downturn have clearly been dashed. Not even the rise in niche market sales, which enjoy much more efficient distribution, has offset this bloodbath as digital sales only accounted for 8 percent of 2013 total sales. Twenty years after the Internet's beginnings, physical sales are still much bigger than digital sales, which remain almost a testimonial market and have even declined, in recent years. The largest digital sales category is subscriptions, followed by the Internet and mobile phone downloads (table 1). Currently, the latter looks like an important business model for the future recorded music market.

SALES	2011	2012	2013	2014
Internet & phone downloads	13.8	14.6	13.2	14.2
Mobile products	2.5	2.1	1.7	14.1
Subscriptions	9.5	18.5	20.2	47.2*
Advertising streaming	16.6	11.7	11.2	
Others	3.7	1.2	1.5	0
TOTAL	46.3	48.2	48.1	69.9

Table 1: Digital Market in Spain (2011-2013) in millions of Euros (Source: Promusicae 2014. * includes advertising streaming income)

This data could hardly be worse from a business point of view: only 15 percent of the population pays for music downloaded while 18 percent download music for free.

According to data from the same report (Promusicae 2015), streaming, i.e., listening to music without downloading it, which is available (either for free or by subscription) on such platforms as Spotify, YouTube, Napster, Vevo, Deezer and XBox Music has generated income of €47.2m, (36.3 percent more than the €34.6m obtained in 2013). This has mainly been the result of an increase of around 30 percent in the number of subscribers. The boom in this type of consumption has coincided with the stagnation in the downloading of songs and albums on iTunes or similar (14.2m, which is 2 percent fewer than in the previous period), whilst music products for mobile phones such as ringtones or ringback tones only amounted to 1.4m – an inter-annual fall in excess of 20 percent. As regards physical sales, the CD market has stemmed its downturn and sold 11.6 million units – 22 percent more than in the previous period. At the same time, the return of vinyl as the favourite format for music-lovers and collectors continues. The 260,000 LPs sold is still a discrete figure but it represents an increase of 85.7 percent on the 140,000 sold in 2013.

Regarding attendance at live music events in 2011, official statistics indicate that 7.7 percent of the population attended a classical music concert during the past year. However, nearly half of the audience attending classical music concerts had free tickets. One out of every four people attended a modern music concert over the past year although one-third had free tickets. The rates of attendance at modern music concerts are higher among males and young people.

In short, we are observing the paradox of ever-greater levels of music consumption but with a shrinking and highly concentrated market. As many reports have showed recently, the music market (physical and digital) is more a traditional "Superstar Economy" rather than a "Long Tail" market, because *"a very small share of the total artists and works account for a disproportionately large share of all revenues: the top 1 percent account for 77 percent of all artist recorded music income"* (MIDIA 2014).

A handful of companies with international links control the bulk of the market, both physical and digital, and the most profitable business strategy is not the "Long Tail", but its converse: the traditional and well known Blockbuster Model. This strategy is based on big investments in a few products designed to appeal to mass audience consumption (Vogel 2001; Elberse 2013). But the future of the music digital market depends on the development of business models, still being developed, with indications of an increase importance of creative industries within the music economy (Pratt 2009). Over the long term, its seems reasonable to predict that online distribution and consumption will be a determinant factor for establishing types and genres of music and the ways they are consumed. Music consumption is shifting towards portable players connected to the Internet with storage services in the cloud (Gartner 2011). Today's consumer is a nomadic omnivore and believes that music should be free.

4 Comparison of music consumption in physical and digital format in Spain

In Spain the overall trend towards replacing the purchase and listening of music from physical to digital formats continues although. In sales terms, physical formats still outpace digital formats. Nevertheless, as previously mentioned, it is not possible to measure and present digital music consumption clearly given uncountable difficulties in quantifying minority micro-consumption and the immense diversity of music listening and consumption situations. Although not reflected in available reports and data, it can be surmised that music consumption on the Internet is much greater than shown by such figures.

There are no doubts, however, regarding the increase in and predominance of music listening of songs (singles) vs. complete albums (records), creating increasingly fragmented consumption. While the traditional recording industry continues to launch its music products in the physical format of full albums, the music listening and consumption trend continues to shift towards singles (IFPI 2013; Promusicae 2013).

Table 2 gives a comparison of the 50 most listened to songs in Spain in 2014. The physical-digital column shows physical and digital sales and also illegal downloads.

	Physical/Download		**Streaming**		**Radio**	
#	Artist	Song	Artist	Song	Artist	Song
1	**Enrique Iglesias**	**Bailando**	**Pharrel Williams**	**Happy**	**Enrique Iglesias**	**Bailando**
2	**Pharrel Williams**	**Happy**	**Enrique Iglesias**	**Bailando**	**Pharrel Williams**	**Happy**
3	**David Bisbal**	**Diez mil maneras**	**Avicii**	**Hey Brother**	**John Legend**	**All of Me**
4	Faul/Wad Ad/pnau	Changes	**John Legend**	**All of me**	**Clean Bandit**	**Rather Be**
5	**John Legend**	**All of me**	**Dani Martin**	**Emocional**	Romeo Santos	Propuesta ind.
6	**Avicii**	**Hey Brother**	Nico & Vinz	Am I Wrong	**Wisin**	**Adrenalina**
7	**Shakira**	**La La La**	**Coldplay**	**A Sky full of stars**	**Pibull**	**Timber**
8	Enrique Iglesias	Loco	**Leiva**	**Ter. cruel**	**Calvin Harris**	**Summer**
9	**Milky Chance**	**Stolen Dance**	**One Republic**	**Counting Stars**	Nicky Jam	Travesuras
10	**Wisin**	**Adrenalina**	**Pibull**	**Timber**	**Katy Perry**	**Dark Horse**
11	**Robin Schulz**	**Prayer in C**	Birdy	Wings	Nico & Vinz	Am I Wrong
12	**Meghan Trainor**	**All about that Bass**	**Milky Chance**	**Stolen Dance**	**Milky Chance**	**Stolen Dance**
13	**Sia**	**Chandelier**	Faul/Wad Ad/pnau	Changes	Yandell/Daddy Y.	Moviendo Caderas
14	Birdy	Wings	**Jason Derulo**	**Trumpets**	Enrique Iglesias	Noche y de dia
15	**Mr Probz**	**Waves**	**Sia**	**Chandelier**	**One Republic**	**Counting Stars**
16	**Coldplay**	**A Sky full of stars**	**Imagine Dragons**	**Demons**	**Sia**	**Chandelier**
17	Marc Anthony	Vivir mi vida	**Katy Perry**	**Dark Horse**	**Avicii**	**Hey Brother**
18	**Clean Bandit**	**Rather Be**	**David Bisbal**	**Diez mil maneras**	**Mr Probz**	**Waves**
19	**Pibull**	**Timber**	Jason Derulo	Talk Dirty	**David Bisbal**	**Diez mil maneras**
20	**Shakira/Rihanna**	**Can´t remember**	Miley Cyrus	Wrecking Ball	**Shakira/Rihanna**	**Can´t remember**
21	Pablo Alborán	Por fin	Ellie Goulding	Burn	Jason Derulo	Talk Dirty
22	M. Jackson/ Timberlake	Love Never …	**Robin Schulz**	**Prayer in C**	**Coldplay**	**A Sky full of stars**
23	Juan Magan	Si no te quisiera	**Avicii**	**Wake Me Up**	**Jason Derulo**	**Trumpets**
24	**Dvicio**	**Paraiso**	**Magici**	**Rude**	**Imagine Dragons**	**Demons**
25	R. Madrid Feat	Hala Madrid	**Calvin Harris**	**Summer**	Faul/Wad Ad/pnau	Changes
26	Auryn	Puppeteer	**Meghan Trainor**	**All about the bass**	**Magici**	**Rude**
27	**Calvin Harris**	**Summer**	**Dvicio**	**Paraiso**	A. Grande /I. Azaleea	Problem
28	Romeo Santos	Propuesta ind.	**Mr Probz**	**Waves**	**Robin Schulz**	**Prayer in C**
29	**Martin Garrix**	**Animals**	Lorde	Royal	Maluma/Eli Palacios	La temperatura
30	One direction	Story of my Life	Bruno Mars	Locked Our of.	David Guetta	Bad
31	**One Republic**	**Counting Stars**	Katy Perry	Loar	Prince Royse	Darte un Beso
32	David Guetta	Dangerous	Luis Fonsi	Corazón en la M.	**Meghan Trainor**	**All about the bass**
33	Klingande	Jubel	**Pharrel Williams**	**Happy**	Imagine Dragons	Radioactive
34	Shakira	Boig Per Tu	Passenger	Let Her Go	Marc Anthony	Vivir mi vida
35	Passenger	Let Her Go	**Shakira**	**La La La**	**Shakira**	**La La La**
36	**Leiva**	**Ter. cruel**	Malu	Me Fui	**Avicii**	**Wake Me Up**
37	**Magici**	**Rude**	Imagine Dragons	Radioactive	K-anarias	La conoci bailando
38	David Guetta	Lovers on the Sun	Macklemore & R.L.	Ray Dalton	Passenger	Let Her Go
39	Pitbull	We are one	**Martin Garrix**	**Animals**	Jason Derulo	Wiggle
40	David Guetta	Shot Me Down	Christina Perri	Human	Maroon5	Maps
41	**Katy Perry**	**Dark Horse**	Taylor Swift	Shake It Off	Jose de Rico	Soltera
42	Taylor Swift	Shake It Off	Antonio Orozco	Llegará	**Dani Martin**	**Emocional**
43	**Jason Derulo**	**Trumpets**	David Bisbal	No Amanece	Enrique Iglesias	Loco
44	Ina/J. Balvin	Cola Song	**Clean Bandit**	**Rather Be**	**Martin Garrix**	**Animals**
45	Miley Cyrus	Wrecking Ball	Antonio Orozco	Temblando	Coldplay	Magic
46	**Avicii**	**Wake Me Up**	Bruno Mars	Young Girl	**Leiva**	**Ter. cruel**
47	Chayanne	Humanos a Marte	Maldita Nerea	Mira Dentro	Juan Magan	Bandera al viento
48	Enrique Iglesias	Noche y de dia	**Wisin**	**Adrenalina**	**Dvicio**	**Paraiso**
49	**Imagine Dragons**	**Demons**	Malú	Deshazte de Mi	Macklemore & R.L.	Ray Dalton
50	**Dani Martin**	**Emocional**	Matthew Coma	Wasted	Ariana Grande	Break Free

Table 2: List of most listened to songs in Spain in 2014 (Source: Promusicae 2015).

The physical data came from the GFK panel, in addition to the following outlets: Amazon, Buongiorno, Gran Vía Musical, Google Play, i-Tunes, Jetmultimedia, Media Markt online, Movistar, Orange, Vodafone, Nokia, Zune and 7Digital y Zune. The songs and artists in the second column represent the most listened to on the streaming format. The data came from the following players: Deezer, Spotify, Xbox Music and Napster. Finally, the data for the most listened to songs on the radio came from audience surveys carried out by the radio companies themselves. The information obtained from these three supports belongs to Promusicae and they are the most objective data to be found in Spain.

The songs and artists, which appear in all three columns, are in bold in Table 2. Of the 50 songs, there are 27, which appear in all 3 media and which confirms the initial hypothesis. It is also worth noting that the labels of the 50 songs belong to the multinational companies of the sector and that, despite the considerable drop in the music market, there is an even greater concentration of the business than in previous years.

These lists indicate that music consumption tends to be the same within the same country, in both physical and online markets, but tends to differ between countries, even within the same listening support category. This indicates that the most highly disseminated music within the territory of each country is the music offering by the large record mediators companies, and it will have a greater level of dissemination via that country's digital networks, even though the networks are global and are firmly anchored to the cultural consumption of a specific socio-cultural, economic and linguistic territory. Moreover, the Internet also appears to reinforce the ancient socialising role of music (Hesmondhalgh 2013b).

It is important to bear in mind the symbiosis between digital networks, the mass media and the social logic of musical consumption. Music products may be produced by large recording companies that control the commercial music markets and the means of dissemination, and these successful products may also be successful in terms of online music consumption of music. However, in some cases, music products that achieve success independently on social networks may be recognised by the recording industry and re-launched as hits in the traditional music markets.

Very complex and overlapping commercial and social logic is at work here. On the one hand, we have the traditional commercial logic of the recording industry that aims for large-scale sales of the products and attempts to control those, circulating successfully through the digital social networks even when they are consumed for free on the Internet. On the other hand, we have viral contagion logics underpinned by habits of imitation and repetition which, therefore, promote the dissemination of what is already circulating on the Internet for free and is later replicated by other cultural industry sectors (e.g. audio-visual) and finally jumps to the mass media (Calvi 2010).

All of the above is taking place within the context of a cultural globalisation broadened by the new digital social networks, within which there is a convergence of multiple cultural expressions from all around the world along with convergence of the means of communication towards the same dissemination platforms. This means the segmentations in music consumption appear to be the same as in the socio-cultural arena. As a result, the networks tend to replicate the same cultural consumption structure found in traditional cultural markets.

5 Conclusion

Never before in history has such a large and diverse amount of music been available as on the digital social networks, with consequences that are yet-to-be analysed. There are musical products to satisfy all tastes, but the problem is still that there is not an appetite for all musical products. In other words, consumption is concentrated in mass-market musical products that are produced, precisely, to satisfy what are considered to be "mainstream musical tastes".

On the Internet listeners are also influenced by peer-to-peer comments and recommendations by people with the same musical tastes and affinities, an amplified form of word-of-mouth communication. Yet this trend strengthens the social logic of imitation and repetition, reinforcing even further the gregarious behaviour of cultural consumption. What is most recommended is what is most listened to which at the same time, is also what is most recommended, creating an endless circle. As a result, people are listening to even more of the same products, already mainstream, in a specific socio-cultural territory. This is the music that is produced and distributed by the large recording companies and distributed via mass means of communication.

The quantitative increase in music on the Internet does not necessarily entail a qualitative increase in listening. In any case, the long and laborious process of listening and cultivation of musical tastes requires the same effort as in earlier eras. From the creative standpoint the situation has not changed a great deal either as musicians need the same long time and effort to learn and prepare as in the era of record players and radio. From the production standpoint, there is the question of whether, in the current post-recording era of high technology mediation, it is possible to develop innovations in musical products such as those which took place in the heyday of the large recording groups and their hefty production budgets.

High technology can distribute lowbrow culture, while highbrow culture can survive with a low technological level and, in fact, the majority of art was produced under such circumstances (Williams, 1995). The support through which social mediation is carried out (the means of communication) does not determine the quality of the contents transmitted. It can be observed that, even though today every type of music is accessible from almost every part of the world, the most listened to music on digital networks tend to be that which is the most simple, commercial, and easiest to produce: i.e. classified within the broad genre called pop-rock.

While music and the recording industry, plus the more complex media-broadcasting-radio sectors, have played a key role in the dissemination of music, the format of their economy is not new: depending primarily on live creation, performances and listening. Today, in the midst of the emergence of the digital world, the live music experience seems to be resurging with increased strength.

Moreover, on the Internet two opposite and sometimes also complementary logics co-exist: on the one hand, the logic of distribution, reproduction and free access to cultural products; and, on the other hand, the logic of merchandising and marketing of the same products. This situation, as in the case with other cultural products, creates significant social gaps.

In short, music consumption in Spain is very diverse and varied, underpinned by the expansion of the Internet and trends in reproduction devices. Nevertheless, mainstream music consumption is reflected in commercial music products, the production of recording companies, and mass communication. These firms remain the main mediators and thought leaders of mainstream musical tastes and consumption. In each country, the most listened to and consumed music outside of the Internet is basically the same as that which is most listened to and consumed online.

New digital arenas are mainly amplifying what already exists outside of them. The Internet tends to reflect what is already occurring in the social world: the music which is most widely circulated and consumed in traditional markets is the same as that which is most circulated and consumed on commercial online platforms. Nevertheless, the Internet reveals a heterogeneous and eclectic range of cultural consumption habits that are as diverse and complex as society itself and the shape that its future development might take is yet to be seen.

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