

Introduction: 'What's Going On'

Studying popular music culture

In July 2006 Bob Geldof visited New Zealand. The Live Aid founder and 'rock star', as the lead singer and main songwriter with Irish post-punk group the Boomtown Rats, then as a solo act, was widely reported when he described the country's foreign aid as 'shameful and pathetic'. Geldof's criticisms received prominent newspaper coverage, they were the subject of magazine cover stories and he appeared on leading television and radio current affairs shows. He used these opportunities to explain the goals and progress of his Make Poverty History campaign, which is also supported by Bono. The surrounding public debate saw the Minister of Foreign Affairs and the Prime Minister both anxious to defend New Zealand's aid record, while welfare groups and letter writers rallied to support Geldof. To the public, Geldof is the rock star forever linked to Live Aid, who used his musical celebrity as a platform for social activism.

This recent episode indicates how popular music is part of the wider culture. Currently, as I complete this book in March 2012, there were many further indications of such links:

- Considerable media coverage followed the sudden death of pop soul diva Whitney Houston, speculating on the cause and focusing on her long battle with drug addiction.
- Engelbert Humperdinck, now 75, is announced as the UK entry for the Eurovision Song Contest; *The Dominion Post* sarcastically sees the singer and the contest as ideally suited: 'The contest draws a TV audience of 100 million people, although no-one ever admits to watching it, while Engelbert has sold 150 million albums [primarily in the 1960s], but it is impossible to find anyone who owns one.' (6 March 2012).
- Fender Musical Instruments announced an initial public offering of US\$200 million, in a move to pay down a heavy debt load and create fresh working capital. The firm was strongly associated with the development of rock and roll, with their 'Strat' guitar a favourite of Jimi Hendrix and scores of other stars.
- Pink Floyd's *The Wall – Immersion Edition* goes on sale (for \$190 New Zealand). It features the 'classic' studio album, first released in 1979, now digitally remastered and presented as a 'limited edition high quality boxed set'. This

includes rare and unreleased video material, a 44-page booklet designed by Storm Thorgerson, who created the original album cover, along with an exclusive photo book, exclusive merchandise and facsimile collectables.

- Teen idol Reece Mastin, winner of the Australian television music show *X Factor*, is mobbed by more than a thousand 'over excited girls' at an Auckland mall appearance prior to his concert there.
- Garth Brooks is inducted into the Country Music Hall of Fame. Now semi-retired, but talking about touring again, the singer was the top-selling artist in the United States during the 1990s, taking country music into stadiums and major metropolitan markets and leading the way in a major crossover of country music to the mainstream pop and rock market.
- Local music retail chain Marbecks announced that it was closing its remaining Wellington (New Zealand) store, as the company scaled down its retail operations to focus on digital and online sales.
- A new classic rock radio station – 97.3 FM The Sound of Wellington – is launched in the local market, with press advertisements featuring U2, Tom Petty, Freddy Mercury, the Police, Mick Jagger and Stevie Nicks.
- The semi-finals of the latest series of *American Idol* continue to be featured in prime time mainstream television coverage.
- It is announced that a 'lavishly illustrated' book, *The Rolling Stones: 50*, will be published on 12 July 2012, to mark the 50th anniversary of the rock group's first gig, at London's Marquee Club.

The daily press also included advertising and reviews for a variety of concerts and club gigs, newly released recordings and the usual proliferation of advertisements for music retail: instruments, sound systems, including iPods, music DVDs and recordings, along with a piece (in the business section) on the continued impact of digital delivery on the music industry.

This is part of the everyday discourse that surrounds popular music and which provides a context and focus for this study. Evident within these stories, reviews and advertising are notions of musical creativity and authorship, canonical texts, musical history, audiences and music as a blend of entertainment, art and commerce. Collectively, and alongside other such stories, they indicate the commercial and cultural significance of popular music. Its ubiquitous global presence is evident on a daily basis: through 'muzak' in shopping malls; on public transport and on the streets and parks as listeners create a personal private space through their use of iPods; on MTV and mainstream television music shows; in film soundtracks and narratives; on web and radio broadcasts; through the music press, and 'live' in a variety of settings, from street buskers to clubs, stadium concerts and music festivals. In cultural terms, popular music is of enormous importance in daily life and for some is central to their social identities. In economic terms, the products of the music industry make it a leading cultural industry, with income including not just the sales of recorded music, but also copyright revenue, tour profits, merchandizing, sales of the music press, musical instruments, sound systems and sheet music.

Popular music culture refers to the ways of making, disseminating and consuming music; the economic and technological practices associated with these processes; and the recordings, sounds, images and discourse (thinking, debating, writing) created by these practices. My approach to it is situated in the general field of cultural and media studies, recognizing that the analysis of institutions, texts, discourses, readings and audiences are best understood in their social, economic and political context. I use the term 'popular music culture' to indicate this and to signal my intention to integrate a range of topics into this introductory survey. While I refer to some basic aspects of musical analysis and have included the analysis of song lyrics in considering recordings as texts, this is not a musicological study; I do not analyze music scores.

Setting agendas

As Bruce Horner and Thomas Swiss (1999: 7) observe, the different meanings given to terms common to the vocabulary of popular music studies, including the very terms 'popular' and 'music', help shape the music and our experience of it. The meaning and utility of terms such as 'popular' and 'mass', especially in relation to 'culture' and 'media', are the subject of considerable discussion and debate. Similarly, 'popular music' and associated terms such as 'rock', 'rock 'n' roll' and 'pop' are used by musicians, fans and academic analysts in a confusing variety of ways. It needs to be remembered that it is difficult to define phenomena that are social practices as well as economic products and which are not static but constantly evolving. Indeed, precise definitions can be constraining; they should be regarded as frameworks for exploration and elaboration, rather than factual declarations to be defended. That aside, let me try to at least pin down the general nature of some of the concepts that are central to the analysis of popular music culture.

Popular

'Popular' is a contested term. For some it means simply appealing to the people, whereas for others it means something much more grounded in or 'of' the people. The former usage generally refers to commercially produced forms of popular culture, while the latter is usually reserved for forms of 'folk' popular culture, associated with local community-based production and individual craftspeople. In relation to popular music, for example, this is the distinction often made between folk music, especially when acoustically based, and chart-oriented recordings, such as dance pop. Such a clear-cut distinction, however, has become increasingly untenable.

In normal usage, 'popular' indicates that something – a person, a product, a practice or a belief – is commonly liked or approved of by a large audience or the general public. Applied to the media, this means that particular television programmes, films, recordings, books and magazines are widely consumed. Their popularity is indicated by ratings surveys, box office returns and sales figures. To

a degree, this definition of 'popularity' reifies popular cultural texts, reducing them to the status of objects to be bought and sold in the marketplace and the social nature of their consumption must always be kept in mind.

With this in mind, this study equates the 'popular' with commercial, cultural forms of entertainment and I regard markets as an inescapable feature of popular culture. Popularity is central to popular culture, as its various products and creators (particularly stars, auteurs) attain general social acceptance and approval. Contemporary popular culture in the United States and Canada, the United Kingdom and New Zealand – to mention only the national settings I am primarily concerned with in this study – forms the majority of mass media content, while the majority of popular culture is transmitted through the mass media.

Obviously, my use of the term 'culture' rejects the argument that anything popular cannot, by definition, be cultural. Although a high–low culture distinction is still very strongly evident in general public perceptions of 'culture', the traditionally claimed distinction between 'high' and 'low culture' has become blurred. High art has been increasingly commodified and commercialized, as with classical music's star system of conductors and soloists, while some forms of popular culture have become more 'respectable', receiving state funding and broader critical acceptance. Yet clear distinctions and cultural hierarchies remain widely held, not least within particular cultural forms, by those involved in their production and consumption. My use of what is one of the most difficult words in the English language is in a sociological rather than an aesthetic sense of culture. In addition to an emphasis on the audiences and consumption aspects of popular culture, I am concerned with the relationship between the creation of cultural products and the economic context of that creation, a process which involves creating or targeting audiences and an active engagement between texts and their consumers. This is to recognize that neither texts nor their consumers exist in isolation.

In an influential and widely cited discussion, Raymond Williams argues that contemporary usage of 'culture' falls into three possibilities or some amalgam of these: 'a general process of intellectual, spiritual, and aesthetic development'; 'a particular way of life, whether of a people, period, or a group'; and 'the works and practices of intellectual and especially artistic activity' (Williams, 1983: 90). This can be seen as a useful, if overly expansive, definition. My interest here lies primarily between the second and third of these definitions; and in the relationship between them – the way in which particular social groups have used popular music within their lives. This is to shift the focus from the preoccupation, evident in much media/cultural studies, with the text in and of itself, to the audience. It is also to stress 'popular culture', rather than accept the reservation of the term culture for artistic pursuits associated with particular values and standards, sometimes referred to as elite or high culture – Williams' third definition. In short, the main concern of this study is with the interrelationship of context, texts and consumption, as demonstrated by the manufacture, distribution and consumption of popular music culture, primarily in its various recorded forms. But what, then, is 'popular music'?

Popular music

Popular music defies precise, straightforward definition. The terms 'rock' and 'pop' are frequently used to stand for 'popular music', when they are metagenres within a much wider body of musics (in Shuker, 2012, I identify and briefly introduce 12 metagenres). While some writers on popular music slide over the question of definition and take a 'common sense' understanding of the term for granted, various attempts to provide a definition can be identified:

1. Definitions that place an emphasis on 'popular'. Historically, the term popular was used in relation to 'the ordinary people'. It was first linked in a published title to a certain kind of music that conformed to that criterion in William Chapple's *Popular Music of the Olden Times*, published in instalments from 1855. Not until the 1930s and 1940s did the term start to gain wider currency. Richard Middleton observes that the question of 'what is popular music' is 'so riddled with complexities ... that one is tempted to follow the example of the legendary definition of folk song – all songs are folk songs, I never heard horses sing 'em – and suggest that all music is popular music: popular with someone' (1990: 3). However, the criteria for what counts as popular, and their application to specific musical styles and genres, are open to considerable debate. Classical music clearly has sufficient following to be considered popular, while some forms of popular music are quite exclusive (e.g. Norwegian black metal).
2. Definitions based on the commercial nature of popular music and embracing genres perceived as commercially oriented. Many commentators argue that it is commercialization that is the key to understanding popular music; an approach that is related to an emphasis on the popular, arguing that such appeal can be quantified through sales, charts, radio airplay and so forth. In such definitions, certain genres are identified as 'popular music', while others are excluded. However, this approach can suffer from the same problems as those stressing popularity, since many genres have only limited appeal or have had limited commercial exposure. Moreover, popularity varies from country to country and even from region to region within national markets. It needs to also be noted that this approach is largely concerned with *recorded* popular music, which is usually listened to in a fairly conscious and focused manner. Anahid Kassabian makes the useful point that what she terms 'ubiquitous musics' are frequently left out of such discussions: music in films, in stores, on the phone, in the office, on television and so on. 'These are the kinds of music that no one chooses for herself or himself but that nevertheless wash our everyday lives with sound' (Kassabian, 1999: 113).
3. Identification by general musical and non-musical characteristics. Philip Tagg (in Middleton, 2002; first published 1982), in an influential and much cited discussion, characterizes popular music according to (i) the nature of its distribution (usually mass); (ii) how it is stored and distributed, primarily as recorded sound rather than oral transmission or musical notation; (iii) the existence of its own musical theory and aesthetics; and (iv) the relative anonymity of its composers. The last of these is debatable and I would want to extend the notion of composers

and its associated view of the nature of musical creativity. However, musicologists have usefully extended the third aspect of Tagg's definition, while sociologists have concentrated on the first two dimensions.

In sum, only the most general definition can be offered under the general umbrella category of 'popular music'. Essentially, it consists of a hybrid of musical traditions, styles and influences, with the only common element being that the music is characterized by a strong rhythmical component and generally, but not exclusively, relies on electronic amplification. Indeed, a purely musical definition is insufficient, since a central characteristic of popular music is a socioeconomic one: its mass production for a mass, still predominantly youth-oriented market. At the same time, of course, it is an economic product that is invested with ideological significance by many of its consumers. At the heart of the majority of the various forms of popular music is a fundamental tension between the essential creativity of the process of making music and the commercial nature of the bulk of its production and dissemination.

As this discussion suggests, as with a term like 'popular culture', it is misguided to attempt to attach too precise a meaning to what is a shifting cultural phenomenon. For convenience, and despite its own associated difficulties, I use the term 'popular music' throughout this study as shorthand for the diverse range of popular music genres produced in commodity form, largely, but no longer exclusively for a youth market, primarily Anglo-American in origin (or imitative of its forms), since the early 1950s and now global in scope.

Histories

Studying the development of popular music culture requires an engagement with its history, to better situate and understand its contemporary status. How do we 'remember' the past, and what influences and informs our memories of 'what happened', and the relative significance of individual events, participants, and musical texts? This musical 'popular memory' is constructed through the interaction of a number of 'sites', which mediate and re-present popular music history. The main one is written accounts, books and journal articles, which have been drawn on throughout this book. I have also utilized film and television documentaries and biopics; the wider music press, especially music magazines and music biography; the recording industry's repackaging of its past, through reissues and boxed sets representative of particular styles and periods of music; and heritage sites, notably museums devoted to popular/rock music, which have become increasingly important. Combined, these various forms of history create public and individual popular memories about the musical past, establishing particular dominant narratives.

It is worth remembering that the history of popular music has been subject to internal critique and debate in a similar manner to other forms of historical writing. At issue are the boundaries of the field, including its tendency to privilege its Anglo-American developments; the treatment of various genres within it; and

the emphases that should be accorded to the context within which popular music is produced. Indeed, it is more correct to talk of *histories*, rather than *history*, in order to stress the contested and contingent nature of historical explanation. As an aspect of popular music studies, these issues have recently enjoyed greater attention, with a dedicated journal (*Popular Music History*); a comprehensive reader (Brackett, 2009); new editions of various standard textbooks (for example Friedlander, 2006; Garofalo, 2011); and 'revisionist' studies of previously dominant narratives.

In a sense, all historical writing is 'revisionist', as each generation of historians take different perspectives on the past, informed by their contemporary location (see MacMillan, 2009). More specifically, however, revisionist history is characterized by asking different, sometimes awkward questions of orthodox 'standard' accounts; and the use of a wider range of primary sources, especially popular material, including oral history. In relation to popular music, in addition to these characteristics, revisionist accounts tend to focus on previously neglected periods, styles and performers, often drawing new connections between these. A recent example of such an approach, with a title indicating the revisionist intentions of its author, is Elijah Wald's *How The Beatles Destroyed Rock 'n' Roll: An Alternative History of American Popular Music* (Wald, 2009). For Wald, rock 'n' roll is not so much a historical genre but rather a process, whereby black dance styles repeatedly transformed pop music and were remade by it in turn. (Shuker, 2010, considers this and similar accounts.)

Analysing popular music culture

The study of popular music culture is situated in the general field of cultural studies, which addresses the interaction between three dimensions of popular culture: lived cultures, the social being of those who consume popular cultures; the symbolic forms, or texts, that are consumed within the lived culture; and the economic institutions and technological processes that create the texts. My discussion of the interrelationship of these dimensions in relation to popular music draws primarily from critical media theory, contemporary political economy and cultural studies. I regard popular cultural texts as dynamic not static, mediated by patterns of economic and social organization and the relationship of individuals and social groups to these patterns. This puts politics in a position of central importance, as culture is viewed as a site of conflict and struggle, of negotiations that constantly confirm and redefine the existing conditions of domination and subordination in society. The construction of meaning in popular music can be seen as embracing a number of factors: the music industry and its associated technologies, those who create the music, the nature of musical texts, the constitution of audiences and their modes of consumption and attempts to influence and regulate all of these. It is, of course, not possible to deal with every aspect of popular music. Themes, topics and examples have been selected partly for their importance in exemplifying the diverse activities of the field of popular music, but primarily for their relevance to the general argument.

The organizational logic of the text is to begin with issues of the economic and technological context: the music industry, music and technology. I go from these to the process of making music and issues of authorship, the nature of musical texts (drawing on popular musicology) and the cultural practices of their production. This leads on to a consideration of consumption and identity, particularly the sites (scenes, social network sites), social groups (fans, collectors, subcultures) and practices involved. I then turn to the manner in which popular music is a form of cultural politics, involving the construction of social identities, and processes of regulation, restriction and empowerment. This is to see meaning in popular music as the product of a somewhat circular process, operating at a number of cultural levels in the personal and social and institutional domains.

The discussion here draws together material from several national contexts and places this within a historical dimension, both aspects at times absent from contemporary-oriented and nation-bound studies of popular music culture. A more historical and international perspective enables firmer conclusions to be made about the nature and impact of popular music, particularly given the continued growth of global multimedia conglomerates and the increasing evidence of the globalization of culture. That said, the geographical Anglo-American and English language-centric nature of the study must be conceded. There are numerous examples of popular music culture in other national and regional contexts, along with a considerable body of scholarship in languages such as Spanish, French, Swedish and German, that I have not been able to cover here. (References to some of this can be found through the website for IASPM: the International Association for the Study of Popular Music; see Further reading.)

More fully, the scope of the book is as follows: Chapter 1 considers the role of the music industry, in its drive to commodify performers and texts and to maximize profits, as central to the study of popular music culture. I look at the music industry as an example of the cultural industries, the operation of the record companies as part of these and the revolutionary impact of digital music on musical production and distribution. The traditional model of the music industry, and the dominance of the major record companies, has been undermined, but not replaced, in a new digital environment.

Chapter 2 examines the impact of technology on popular music and the closely related issue of copyright. Technological changes in recording pose both constraints and opportunities in terms of the organization of production, and innovation in musical instrumentation has facilitated the emergence of 'new' sounds. New recording formats and modes of transmission and dissemination, most recently digital, alter the nature of musical production and consumption, and raise questions about authorship, the legal status of music as property and the operation of copyright.

Chapters 3 through 6 examine musical authorship and the 'success continuum', texts and genres: Chapter 3 deals with the process of music making and sites of production; conceptions of the term 'musician' and a 'success continuum'; and the status accorded various categories of performer.

Chapter 4 provides a range of individual career profiles, both stars and auteurs, with brief examples of their work. These profiles illustrate the interaction of musical authorship with genres, audiences and history.

Chapter 5 considers the textual forms popular music takes, the application of musicology to popular song, and issues of lyric analysis, and the nature of song covers.

Chapter 6 looks at the nature and significance of genres, and the role of authenticity in their construction, and the concept of popular music metagenres, using rock and pop, heavy metal and world music as case studies of these. The identification of a rock album canon illustrates the debates around music and authenticity and the cultural and musical value of such forms and constructs.

Chapters 7 to 9 examine further institutional mediators of music, primarily the music media; along with the sound recording companies, considered earlier, these act as gatekeepers and disseminators. Linking them is marketing, the focus of Chapter 7, along with music retail and radio, with the charts providing a central link between these.

Chapter 8 considers the relationship between sound and pictures: popular music and film, television, music video and MTV and YouTube.

Chapter 9 is on the role of the music press, a term used here for the whole corpus of writing on popular music, ranging from the popular press to cultural journalism, in both physical publications and on the internet. Within this discussion, the focus is on music magazines and music critics as cultural gatekeepers, promotional adjuncts to the music industry and general purveyors of lifestyles.

Chapters 10 and 11 examine the consumption of music, in relation to the formation of social identities, at the level of the self and the group. Two factors are seen to underpin this: music as a form of cultural capital and music as a source of pleasure and empowerment. Chapter 10 shows the place of music in the lives of 'youth' as a general social category and as integral to fan culture. Dance and record collecting provide examples of music consumption as a social practice.

Chapter 11 considers music as a central component of the 'style' of youth subcultures and musical scenes and sounds, the musical geography of place.

Chapters 12 to 14 encompass aspects of music as cultural politics: Chapter 12 investigates popular music as a vehicle for political activism and social change, again in relation to the construction of social identities. Music as cultural politics returns us to the significance of the socioeconomic context in shaping cultural meaning in the music.

Chapter 13 uses historical case studies to show how attempts to regulate popular music, its fans and performers have constituted a form of 'moral panic'.

Chapter 14 is on state music policy. The validity of the 'cultural imperialism' thesis and the concept of globalization are discussed in relation to popular music in Canada and New Zealand. The response of each to the dominance of Anglo-American music provides possible models for wider emulation and insights into the question of what might constitute the 'national' in cultural forms.

A difficulty facing any introductory textbook is the balance between general discussion of relevant topics, key concepts and debates within these, and

illustrative examples of each. Given the constraints of length, I have chosen breadth of coverage over depth. Each of the topics covered is substantial and clearly there is not scope to explore each one in detail; at times particular aspects can merely be introduced and further lines of enquiry suggested. At the end of each chapter, and of this introduction, we provide a selected range of key sources for further study, while there is further guidance and links to internet resources on the companion website for *Understanding Popular Music Culture*: www.routledge.com/ahuker.

Further reading

The following is a selection of general overviews of the field, edited collections, and discussions of key terms and concepts:

- Bennett, A., Shank, B. and Toynbee, J. (eds) (2006) *The Popular Music Studies Reader*, London, New York: Routledge.
- Cateforis, T. (ed.) (2007) *The Rock History Reader*, New York, London: Routledge. (See also his insightful discussion of the process of producing the reader: Cateforis, T. [2009] 'Sources and Storytelling: Teaching the History of Rock through its Primary Documents', *Journal of Popular Music Studies*, 21, 1: 20–58.)
- Clayton, M., Herbert, T. and Middleton, R. (eds) (2012) *The Cultural Study of Music. A Critical Introduction*, 2nd edn, New York, London: Routledge.
- Frith, S. (2007) *Taking Popular Music Seriously. Selected Essays*, Aldershot: Ashgate.
- Frith, S. and Goodwin, A. (eds) (1990) *On Record: Rock, Pop, and the Written Word*, New York: Pantheon Books. (The scope of this influential early study can be usefully set alongside and compared to later 'readers', to show the changing emphases in the field of study.)
- Hesmondhalgh, D. and Negus, K. (eds) (2004) *Popular Music Studies*, London: Arnold.
- Negus, K. (1996) *Popular Music in Theory*, Cambridge: Polity Press.
- Shuker, R. (2012) *Popular Music: The Key Concepts*, 3rd edn, London: Routledge.

Leading journals include *Popular Music*, *Popular Music and Society*, *Perfect Beat*, *Popular Music Studies* (links to these, and further information on them, can be found on this book's website).

A still useful bibliography is:

- Shepherd, J., Horn, D., Laing, D., Oliver, P., Wicke, P., Tagg, P. and Wilson, J. (eds) (1997) *Popular Music Studies: A Select International Bibliography*, London: Mansell.

It can be updated by referring to the International Association for the Study of Popular Music (IASPM) bibliography, on the Association's website. IASPM has international and regional conferences and also publishes a newsletter; see the website: www.iaspm.com

1 'Every 1's a Winner'

The music industry and the record companies

The music industry can best be defined as encompassing a range of economic activities or revenue streams. These are engaged in by various economic entities, primarily, but not exclusively, the sound recording companies, commonly referred to as the 'record labels'. These business institutions are characterized by accompanying social practices: the manner in which people operate within and in relation to them.

I regard an understanding of political economy and the associated notion of the cultural industries as central to the study of the music industry. Following an introduction to these related concepts, I focus on the heart of the industry, the record companies themselves. Historically, these have been engaged in a constant struggle to control an uncertain marketplace, primarily through concentration and consolidation (vertical integration), their operation as part of media conglomerates (enabling horizontal integration and facilitating marketing) and the regulation of copyright. The general view of the binary nature of the record companies, into 'majors' and 'independents', is problematic, but it does provide insights into their ideological underpinnings, their organization and operating practices. The music industry has used the extension and consolidation of copyright legislation, both domestically and internationally, in an attempt to maintain market control.

The late 1990s saw the beginning of a long decline of the sound recording companies and their market dominance, as the internet radically altered the production and marketing of music, with music increasingly going online and the digital environment posing a major challenge to the traditional operation of copyright. This shift is considered in the second half of the chapter, which looks at the arguments around this decline, the record labels' response to it and the present configuration of the industry.

The music industry

There is a tendency, especially in general discourse, to equate the 'music industry' with the sound recording companies, which develop and market artists and their 'records' in various formats, including digital. This sector has historically been at the heart of the music industry and it certainly remains a very significant part

of it. In a broader sense, however, the music industry embraces a range of other institutions and associated markets, which can be considered 'income streams' (Hull *et al.*, 2011, provide an extensive overview). The most important of these are music publishing; music retail; the music press; music hardware, including musical instruments, sound recording and reproduction technology; tours and concerts, and associated merchandizing (posters, t-shirts, etc.); film, television and MTV, and royalties and rights and their collection/licensing agencies.

The following are a few indications of the nature and value of these activities:

- During 2011 Adele's album *21* sold 14.5 million copies globally, contributing to a 3 per cent increase in album sales in the US market alone.
- The concert business saw overall ticket sales in the US up by 5.3 per cent (15.9 to 16.7 million), boosted by U2's '360' tour.
- Music has been the top entertainment product driving the continued growth of mobile phone services, especially among the 18–35 age group.
- Prime TV music shows, notably *Idol*, *The Voice* and *Glee*, continued to play a significant promotional role, boosting record sales and panel participants' careers.
- With 114 million registered users, eBay has become a primary source for music buyers generally and record collectors in particular; in December 2011 a copy of the Beatles early 7" single, 'Please Please Me', signed by all four members of the group, sold for £8000.
- *Rolling Stone* magazine has partnered with online subscription service Spotify to offer playlists and reviews, along with free streaming music.

As the International Federation of the Phonographic Industries (IFPI) observed back in 2006:

The recorded music industry is the engine helping to drive a much broader music sector, which is worth more than US\$100 billion globally. This is over three times the value of the recorded music market, and shows music to have an economic importance that extends far beyond the scope of record sales.

(IFPI, 2006)

I shall return to other aspects of 'the music industry' throughout this study, but concentrate here on the sound recording companies and their activities. The critical analysis of these has drawn heavily on political economy and a view of music as constituting a cultural industry.

Political economy

A political economy approach to the popular mass media has as its starting point the fact that the producers of mass media are industrial institutions

essentially driven by the logic of capitalism: the pursuit of maximum profit. The fact that these institutions are owned and controlled by a relatively small number of people, and that many of the largest scale firms are based in the US, is a situation involving considerable economic and ideological power. A number of accounts have traced the pervasive and increasing inequality in access to information and cultural products due to the commercialization and privatization of broadcasting, libraries, higher education and other areas of public discourse. A small group of large industrial corporations have systematically acquired more public communications power than any private business has ever before possessed in world history, creating a new communications cartel. The music industry has been part of this process of consolidation. At issue is the consequent question of control of the media and in whose interests they operate and the relationship between diversity and innovation in the market.

The influence of political economy is evident in the argument of studies that emphasize the power of corporate capitalism to manipulate and even construct markets and audiences. The picture of a powerful corporate capitalist music industry, able to manipulate and even construct markets and audiences, stresses how the music business is now an integral part of a global network of leisure and entertainment corporations, typified by a quest for media synergy and profit maximization (Chapple and Garofalo, 1977; Goodman, 1997; Hesmondhalgh, 2007). An extension of this is the classic form of the cultural imperialism thesis, popularized in the 1970s, which implied that mass manufactured popular culture, primarily from the US, is swamping the integrity and vitality of local cultural forms (see Chapter 14).

Classical political economy tended to devalue the significance of culture, seeing it primarily as the reflection of the economic base of society, all too easily slipping into a form of economic determinism. A group of German intellectuals, active from the 1930s, the Frankfurt School theorists, criticized mass culture in general, arguing that under the capitalist system of production culture had become simply another object, the 'culture industry', devoid of critical thought and any oppositional political possibilities. Adorno applied this general view more specifically to popular music, especially in his attacks on 'Tin Pan Alley and jazz. Contemporary political economy theorists have become more sophisticated in their appreciation of the reciprocal relationships between base and superstructure, economics and social activity. As David Hesmondhalgh (2007) convincingly demonstrates, it is necessary to emphasize a view of the cultural industries as complex, ambivalent and contested. Media institutions have been examined by asking of media texts: Who produces the text? For what audience? In whose interests? What is excluded? Such an interrogation necessitates examining particular media in terms of their production practices, financial bases, technology, legislative frameworks and their construction of audiences. This new work has reasserted the importance of political economy, which has been prominent in the last decade in considering the nature of music as a cultural industry.

The cultural industries

A descriptive term first coined and developed by Adorno, who referred to them as the 'culture industries', the cultural industries are those economic institutions 'which employ the characteristic modes of production and organization of industrial corporations to produce and disseminate symbols in the form of cultural goods and services, generally, though not exclusively, as commodities' (Garibani, 1987: 25). In analyses situated in business economics, they are referred to as the entertainment industries. Such industries are characterized by a constant drive to expand their market share and to create new products, so that the cultural commodity resists homogenization. In the case of the record industry, while creating and promoting new product is usually expensive, actually reproducing it is not. Once the master copy of a recording is available, further copies are relatively cheap as economies of scale come into operation; similarly, a music video can be enormously expensive to make, but its capacity to be reproduced and played is then virtually limitless.

The increased concentration of the culture industries is a feature of late capitalism and the music industry was part of this process of consolidation. The move into Hollywood by Japanese corporate capital in the late 1980s was a clear indication of the emerging battle for global dominance of media markets. This battle reflected companies' attempts to control both hardware and software markets and distribute their efforts across a range of media products, a synergy that enables maximization of product tie-ins and marketing campaigns and, consequently, profits (see the examples of this in Chapter 7).

Such mergers reflected the economies of scale and global integration required to compete on the world media market. A small group of internationally based large corporations spread their interests across a variety of media, including sound recording, resulting in multimedia conglomerates such as Time-Warner. Two of the main corporate strategies used here are horizontal and vertical integration: horizontal integration describes the actions of a firm to buy out (or control, usually through marketing and distribution deals) competing companies at the same level, as with one music retail chain acquiring another music retail chain; vertical integration refers to a market in which a firm owns more than one aspect of the production chain from manufacture through distribution and marketing, as with a music distributor that owns a music retail chain. These linked economic concepts have been neatly explained in terms of a community fish tank: consuming, or controlling, other similar sized fish in the tank is an example of horizontal integration; vertical integration occurs when a large fish owns the tank, the water, the plants, the rocks and the food supply, which it distributes to the other fish (Bishop, 2005: 447).

German media giant Bertelsmann illustrates these processes at work. In 2008 Bertelsmann owned book publishing (Random House); magazines and newspapers (Grüne+Jahr); printing and media services (Arvato Printing); direct marketing groups (book and CD clubs); online interests (CDnow); and, the heart of the company, Bertelsmann Music Group (BMG). In 2006 Bertelsmann had sold

BMG publishing, the world's third largest music publishing company, with 2005 revenue of €371 million, to Universal Music. Yet, indicating the huge scope of Bertelsmann's interests, that figure then only accounted for about two per cent of the company's total revenue.

The cultural industries are engaged in competition for limited pools of disposable income, which will fluctuate according to the economic times. With its historical association with youthful purchasers, the music industry is particularly vulnerable to shifts in the relative size of the younger age cohort, their loss of spending power in a period of high youth unemployment worldwide and their shifting modes of consumption in the era of the download. The cultural industries are also engaged in competition for advertising revenue, consumption time and skilled labour. Radio, television and music magazines are all heavily dependent on advertising revenue. Not only are consumers allocating their expenditure, they are also dividing their time among the varying cultural consumption opportunities available to them. With the expanded range of leisure opportunities in recent years, at least to those able to afford them, the competition among the cultural, recreational and entertainment industries for consumer attention has increased.

The record companies

The record companies are an important part of the culture industries. Since its initial development in the early 1900s, the sound recording industry has demonstrated four main characteristics (see Friih, 1988; Gebesmai, 2009):

- a high concentration of markets
- the vertical integration of firms
- their transnational and global operation
- a dependence on copyright regulations.

These remained evident in the subsequent evolution of the record companies, which into the 1990s continued to demonstrate the features identified as characteristic of the cultural industries (Vogel, 1994; he prefers the term 'entertainment industries'):

- Profits from a very few highly popular products are generally required to offset losses from many mediocrities; overproduction is a feature of recorded music, with only a small proportion of releases achieving chart listings and commercial success and a few mega-sellers propping up the music industry in otherwise lean periods (e.g. Michael Jackson's, *Thriller*, 1982, with sales of some 20 million copies throughout the 1980s).
- Marketing expenditures per unit are proportionally large; this applies in the music industry to releases from artists with a proven track record.
- Ancillary or secondary markets provide disproportionately large returns; in popular music through licensing and revenue from copyright (as with film

soundtracks). Capital costs are relatively high and oligopolistic tendencies are prevalent; in the music industry this is evident in the dominance of the majors, in part due to the greater development and promotional capital they have available.

- Ongoing technological development makes it ever easier and less expensive to manufacture, distribute and receive entertainment products and services.
- Entertainment products and services have universal appeal, as evidenced by the international appeal of many popular music genres and performers; this is enhanced by the general accessibility of music as a medium, no matter what language a song may be sung in.

A significant, albeit frequently debated, aspect of the record companies is their broad division into major and independent labels.

Calling the tune? The majors

The record industry has historically been dominated by a group of large international companies commonly referred to as the majors. The major labels are usually involved in all aspects of the management, production, distribution and sale of recorded music, attempting as far as possible to control these different aspects. They have similar organizational structures, with typical management hierarchies and various divisions: A&R; promotion; sales and marketing (for a detailed discussion, see Hull *et al.*, 2011; for an insightful analysis of the process in the 1980s, which remains relevant and provides an historical 'benchmark' for subsequent developments in the digital age, see Negus, 1992).

Historically, 'middle range' companies, such as Virgin, Motown and Island, have been absorbed by the majors, while the smaller independents are often closely linked to the majors through distribution deals. Each major commonly has branches throughout the Americas and Europe and, in most cases, in parts of Asia, Africa and Australasia and each includes a number of record labels.

By the late 1990s there were six majors, all part of large international media conglomerates: Thorn/EMI (UK based); Bertelsmann (Germany); Sony (Japan); Time/Warner (US); MCA (with a controlling interest purchased in 1995 by Canadian-owned company Seagrams); and Philips (Holland). By 2006 further consolidation and mergers had left four: Warner Music Group, part of AOL-Time-Warner; Universal Music Group, owned by Vivendi Universal SA of France; Sony-BMG, jointly owned by the Japanese Sony Corporation and Bertelsmann, which had merged in 2004; and EMI Ltd, a UK firm. In 2011 industry consolidation continued, as EMI, the smallest of the four remaining major labels, pending regulatory approval, was sold to Universal Music, with staff layoffs and roster cutbacks of performers likely to follow. This left Universal with a market share of around 40 per cent, overshadowing Sony and Warner, the other remaining majors.

The market share exercised by the majors varies from country to country, but in some cases is over 90 per cent. There is considerable debate over the economic

and cultural implications of such market dominance, especially the strength of local music industries in relation to marked trends toward the globalization of the culture industries and governmental policy responses to this situation (see the examples of Canada and New Zealand, discussed in Chapter 14). Some commentators regard the natural corollary of such concentrations of ownership as an ability to essentially determine, or at the very least strongly influence, the nature of the demand for particular forms of popular culture. By the same token, more optimistic media analysts, with a preference for human agency, emphasize the individual consumer's freedom to choose, the ability to decide how and where cultural texts are to be used and the meanings and messages to be associated with them. The debate in this area is one of emphasis, since clearly both sets of influences or determinations are in operation.

At issue is the consequent question of control of the media and in whose interests they operate and the relationship between diversity and innovation in the market. Free market economists argue that innovation will occur more frequently under conditions of oligopoly (increased concentration, fewer producers), since larger firms are better able to finance innovation and pass the costs and benefits along to consumers. Conversely, other analysts argue that conditions of oligopoly mean a lack of incentive for firms to depart much from the tried and tested, resulting in a high level of product homogeneity.

Initial analyses of the relationship between concentration, innovation and diversity in popular music suggested a negative relationship between concentration and diversity in the recording industry, relating this to a cyclical pattern of market cycles in symbolic production. This suggests that original musical ideas and styles, generated organically, are taken up by the record industry, which then popularizes them and adheres to them as the standard form. Meanwhile, new creative trends emerge that have to break through the new orthodoxy. This develops a cycle of innovation and consolidation, which has been reflected in historical shifts in economic concentration and market control in the music industry.

The crucial question in this debate is how does such concentration affect the range of opportunities available to musicians and others involved in the production of popular music and the nature and range of products available to the consumers of popular music? In other words, what is the cultural significance of this situation and what role does it play in the creation of meaning in popular music?

The independents

While the 'majors' dominate the recorded music market, the 'independents', or 'indies', play an important role. These are generally small record labels that are independent of the majors (at least in terms of the artist acquisition, recording and promotion), although still reliant on a major for distribution and more extensive marketing (examples historically include Creation, 4AD, Sub Pop, Sugar Hill, Rough Trade and Stiff). These labels are frequently considered to be more flexible and innovative in their roster of artists and have frequently been

associated with the emergence of new genres. The term 'indie' denotes not just a type of economic entity, but a musical *attitude*. Both senses of indie are linked to a set of dominant musical values, with authenticity at their core, with these values cast as diametrically opposed to a stereotyped mainstream and the majors. The crossover of indie bands from smaller labels into the mainstream music industry, as occurred with U2, REM and Nirvana, led to considerable debate among their fans.

Independents have a rich and often lauded role in the history of popular music. It has been argued that independent record companies in the 1950s did not have the corporate hierarchy of the majors and so had greater flexibility in picking up on and promoting new trends and talent and a greater ability to adjust record production. In companies such as Sun, the owner, record producer, sound technician and promoter often were the same person (as with Sam Phillips at Sun). 'The 1950s decade was the golden era for small independents, which embraced blues, gospel, modern jazz, country, R&B, and rock 'n' roll', and from 1948 to 1954, about one thousand new record labels were formed' (Kennedy and McNutt, 1999: xvii).

To maintain their market control, the music majors adopted several strategies in relation to the independents: buying out their artists' contracts (RCA and Elvis from Sun) or persuading artists to move labels; entering into marketing and other business arrangements with them or simply by buying them out. Several independents acquired a significant market share, as did Motown in the 1960s; these became mid-range companies, situated between the majors and the independents, but were subject to absorption by their larger rivals. While there are a huge number of independent labels, and they produce two-thirds of the titles released, their market share remains small. The operation of the independents and the precise nature of their relationship with the majors continues to be debated and the interaction between them remains a dynamic process.

The independent sector has continued to be an important part of the music industry, made more viable by the opportunities (for marketing and distribution) facilitated by the internet, while often still acting as developers of talent for the majors. The examples of Creation and the career of Oasis and Rough Trade in the UK during the 1990s illustrated a definite blurring of the boundaries between the independents and the major companies. Accordingly, argues Dale, 'indie ceased to be an abbreviation of the word independent, and thus ceased to denote a significant distinction from the major labels' (Dale, 2008: 173). The contemporary music industry, where many indies are in fact part of larger networks of labels, requires a more flexible and qualified definition, with the indie record company 'characterized by some degree of separation from the business practices and creative control of the large corporations operating major labels' (Novara and Henry, 2009: 816).

Music in cyberspace: the industry goes online

The late 1990s saw the beginning of a long decline of the major recording companies and their market dominance, as the internet radically altered the

production and marketing of music, with music increasingly being made available online; many indie labels also struggled to come to terms with the new digital environment. The old industry model no longer worked: 'The defining issue is that music users can access music they find satisfying *without buying it*, and this can only problematise historically embedded profit seeking production routines' (Jones, 2012: Chapter 8).

The internet is a computer-linked global communications technology, with dramatically increasing numbers of people accessing it since the late 1990s. Its impact is much debated: there is a utopian discourse of celebration at the democratic spaces and opportunities it has created, alongside of recognition of its colonization by traditional media institutions and power structures. The world wide web, a major part of the internet, includes sites for online music retail; for downloading music as digital files; for record companies, performers and fans; online music journals; online concerts and interviews; web radio and bulletin boards (Cantoni and Tardini, 2006). These represent new ways of interlinking the audience/consumers of popular music, the performers and the music industry. I shall return to these in later chapters; my emphasis here is on the impact of the web, and digital music, on the recording industry.

Early discussions of the significance of electronic commerce via the web emphasized the business and economic aspects: the benefits to firms and consumers; the barriers and difficulties associated with doing business via the net; the demographics of net users; and the opportunities for companies on the net. It was soon recognized that there were also significant cultural issues associated with popular music on the net, which linked up with ongoing debates in the political economy of popular music, notably the relative importance (power) of the music industry and the consumers of popular music (Jones, 2000). The net potentially created greater consumer sovereignty and choice by bypassing the traditional intermediaries operating in the music industry (primarily the record companies, but also physical music retail; see Chapter 7). The major record companies were initially slow to recognize its potential, but soon moved to create sites to showcase their activities and their artists.

In the early 2000s music continued to shift online, with legal downloading taking an increasing market share, made even more attractive by the development of the iPod and its competitors, portable music systems capable of storing huge numbers of songs in digital format. In 2006 a major IFPI report on digital music, a comprehensive review of the development of the digital music market internationally, presented some impressive statistical evidence. It showed the online shift had actually gained momentum, with two million songs now available online. The following summarizes the trends then evident:

- Digital music now accounts for about six per cent of record companies' revenues, up from practically zero two years ago.
- Sales of music via the internet and mobile phones proliferated and spread across the world in 2005, generating sales of US\$1.1 billion for record

companies – up from US\$380 million the previous year – and promising further significant growth in the coming year.

- Music fans downloaded 420 million single tracks from the internet last year – 20 times more than two years earlier – while the volume of music licensed by record companies doubled to over two million songs.
- The legitimate digital music business is steadily pushing back on digital piracy. In Europe's two biggest digital markets, UK and Germany, more music fans are legally downloading music than illegally file swapping.
- Mobile music now accounts for approximately 40 per cent of record company digital revenues. Record companies are seeing sharply increased sales of master ringtones (excerpts of original artist recordings).

IFPI Chairman and CEO John Kennedy, however, noted that this growth faced challenges from piracy and called for 'more cooperation from service providers and music distributors, to help protect intellectual property and contain piracy'. This view was challenged by observers not so comfortable with the shift to longer periods of copyright and greater industry regulation and prosecution of those breaking it. Central to these debates was the question of the operation of copyright in the new digital environment.

Copyright

In addition to industry concentration, copyright has been central to the recording industry's attempts to maintain market share and control of music. The basic principle of copyright law is the exclusive right to copy and publish one's own work. That is, the copyright owner has the right to duplicate or authorize the duplication of their property and to distribute it.

The Rome Convention and the Berne Convention are the major international agreements on copyright. The IFPI, the International Federation of the Phonographic Industries, globally regulates the application and enforcement of copyright. Rights income is collected by various local and regional agencies, such as AMCOS, the Australasian Mechanical Copyright Owners Society; and APRA, the Australasian Performing Rights Association, in New Zealand and Australia. In addition to deriving income from unit sales of records, record companies, performers, songwriters and music publishers derive income from the sale of rights. Ownership of rights is determined by copyright in the master tape, the original tape embodying the recorded performance from which subsequent records are manufactured. This rights income includes: (i) mechanical income: payable by the record company to the owner of the copyright, for permission to reproduce a song on record; this is a fixed percentage of the recommended retail price; (ii) performance income: a licence fee paid by venues, television and radio stations for the right to publicly perform or broadcast songs; and (iii) miscellaneous income: payment for the use of songs in films, adverts, etc. A fuller description of the nature of copyright is beyond my scope here (see Hull *et al.*, 2011: Chapters 3 and 4; for a fascinating history of

challenges to the music industry's enforcement of copyright, see Kernfeld, 2011). Its significance lies in its changing application and associated cultural importance. The development of new technologies of sound recording and reproduction raise issues of intellectual property rights, copyright and the control of sounds.

As early case studies of the legal and moral arguments surrounding the sampling used in records by the JAMS, M/A/R/R/S, De La Soul and others showed (see Beadle, 1993), the issues involved in policing copyright were extremely complex. They focused on the questions of what is actually 'copyrightable' in music. Who has the right to control the use of a song, a record or a sound? What constitutes fair use and what needs copyright clearance and, possibly therefore, payment? What is the nature of the public domain? In the early 1990s Simon Frith could observe that the advent of new technologies of sound recording and reproduction had coincided with the globalization of culture and the desire for media/entertainment conglomerates to maximize their revenues from 'rights' as well as maintaining income from the actual sale of records. What counted as 'music' was changing from a fixed, authored 'thing' that existed as property, to something more difficult to identify (Frith, 1993). Governmental and industry organization attempts to ensure international uniformity in copyright laws initially met only with partial success; even within the European community conventions and practices varied considerably.

As remains the case, attitudes towards copyright diverge depending whose interests are involved. The 1990s saw an emerging hostility towards copyright among many music consumers and even some musicians, due to its regulatory use by international corporations to protect their interests. Contrariwise, the companies themselves began actively seeking to harmonize arrangements and curb what they saw as straightforward piracy, while the record industry associations, which are almost exclusively concerned with copyright issues, largely supported the industry.

The nature of intellectual property rights, and the regulation of these, was brought into even sharper focus with the electronic retrieval possibilities implicit in the net. Beginning around 1999/2000, the mainstream music industry showed increasing alarm at the impact on their market share of Napster *et al.* and practices such as the downloading of MP3s and P2P (person-to-person) file sharing.

Napster software was introduced in 1999, 'designed as a combination search engine, communication portal, and file-sharing software that facilitated the sharing process by granting users access to all other Napster users and the MP3 files they chose to share' (Garofalo, 2003: 31). Within a few months, transfers of music files using Napster reached millions per day and, at its peak, it was estimated that as many as 60 million people were using the service. The copyright violation, and consequent loss of revenue, led several artists (notably the band Metallica) and record labels to sue Napster for breach of copyright. The issues involved were complex and the litigation process was a lengthy and very public one. Napster was forced to close down, but was relaunched as a legitimate service

in late 2003 (Napster 2.0). Newer technologies and providers moved things to another level:

Whereas Napster required users first to log onto a central server to access other users' MP3 files, these newer networks allow direct user-to-user peer-to-peer connections involving multiple file types. These innovations expand the universe of file sharing activity and make it virtually impossible to track users or the files they choose to share.

(Garofalo, 2003: 31)

MP3 challenged the recording company's control over distribution and, since the format had no built in way to prevent users from obtaining and distributing music illegally, could represent considerable lost revenue. The majors, through trade organizations such as the RIAA (Recording Industry Association of America), joined together to create the Secure Digital Music Initiative (see www.sdmi.org), in an attempt to reassert control over music distribution and also began legally targeting ISPs (internet service providers) and individual consumers who download and share music without permission/payment. National administrations introduced legislation attempting to modify copyright in regard to online music distribution, as with the 1998 US Digital Millennium Copyright Act (see Strasser, 2010: 54–5). An alternative industry strategy also emerged, when in 2000, record companies began establishing copyright deals with internet music producers. In 2003 the entry of Apple into the music marketplace, with its iTunes service, met with considerable success, encouraging the development of further such services, most notably eMusic, which only sells music from independent labels.

There is a basic tension between protecting the rights and income of the original artists and the restriction of musical output. Copyright was originally conceived as a mechanism to balance private and public interests by eliminating perpetual monopolies over creative works. To some commentators, the media conglomerates were now attempting to 'use their power and [intellectual] property to influence national and international laws in order to lock down culture and control creativity' (Bishop, 2005: abstract).

The battle over P2P file sharing has continued, with the music industry targeting new, post-Napster services and individual consumers whom they perceived as infringing copyright. National governments continue to be involved in such attempts at regulation. In New Zealand, for example, in May 2011 the government passed the Copyright (Infringing File Sharing) Amendment Act, giving more power to a copyright tribunal, enabling them to require ISPs to send warning notices if illegal downloading occurs. After three warning letters, a copyright holder can take a claim to the tribunal, which can then impose a maximum fine of (NZ) \$15,000 to the current account holder. The act has already provoked considerable hostility and opposition, not least as unsuspecting parents whose children download would be targeted ('Internet law may catch parents unaware', *Dominion Post*, 15 April 2011: A4, was typical of news coverage); questions also

remain around the cost of sending such letters (and who will fund them) and it remains to be seen if the legislation is workable. This local debate has mirrored the wider international discourse around downloading practices.

There are several core issues in these developments and debates. At an immediate level has been the question of the impact of downloading on 'legitimate' recording sales. From the industry point of view, and that of some observers, downloading was clearly hurting the industry. Others were not so convinced and there were some interesting comparisons with similar earlier episodes, notably tape copying. Second, market control was central to the debate around Napster and its successors: were artists and the recording companies being disempowered and consumers (end users) being empowered by the increasing availability of online music? (McLeod, 2005).

The recording industry fights back

In 2011 there were signs that the recording industry was making something of a comeback, after a decade of label mergers, staff layoffs and piracy lawsuits.

Digital music cloud services flourished: Spotify made its US debut; Apple released its iTunes Match cloud service; and Google and Amazon both launched their own cloud-based services. A major feature of this resurgence was the increased importance of live music. Concert ticket prices have risen well above inflation since 1996, at the same time there has been a decrease in revenue from recorded music. Consequently, live performance is now one of the primary income streams for performers and the music industry. Reunion concerts and tours by a number of previously long inactive bands or performers, who nevertheless retained the affection of their aging fan bases, have become a feature of the contemporary concert circuit (for example, the Eagles; 10cc; the Specials; Bob Seger). *Billboard* magazine regularly documents income generated by concert tours, showing how these are a major income stream for performers, including those who have not released 'new' music, or toured, for quite some time. In 2009, Coldplay's tour behind the release of the album 'Viva La Vida' earned (US) \$24.7 million; the Jonas Brothers world tour netted them \$31.4 million; and Leonard Cohen, playing his first US concerts in 15 years, earned \$9.2 million in box office share.

The emergence of Live Nation as a major market force is indicative of the new prominence of live music as an industry income stream. In 1996 the American Robert Sillerman and his company SFX Entertainment began acquiring companies in the live music sector. In 2000 SFX was brought by the multinational corporation Clear Channel, which then combined its live entertainment assets into a separate company, Live Nation, in 2005. Live Nation now dominates concert promotion in both the United Kingdom and North America and is the second largest music company in the world (behind Universal). (Hull *et al.*, 2011: 166–8). Live Nation has struck deals with many of music's major performers. Madonna's long-term multi-rights Live Nation deal, valued at US\$120 million, is based primarily on potential to generate touring income: her international Sticky

and Sweet tour in 2009 was the highest grossing tour ever by a solo artist; in March 2012 Madonna began her second world tour with Live Nation. U2's similar 12-year multi-rights deal with Live Nation includes worldwide touring, merchandizing and the lucrative U2.com website, which digitally distributes all things U2.

Conclusion

The recording industry is now in a new post-industrial phase, characterized by the impact of digital music and the decentralizing of the means of recording, reproduction and distribution. At the same time, there is increasing consolidation of the music industry as a whole, as part of the global cultural industry. The international conglomerates not only compete with one another, but are increasingly interconnected in complex patterns of ownership and business practices. The majors remain dominant, but their market share continues to shrink. While the global music industry is still concentrated around the production and management of commodities, the management of rights is providing an increasingly important share of its revenues.

Through the 2000s, the impact of the internet and digital music has raised serious questions about the continued adequacy of the traditional business model adopted by the majors (for a helpful discussion of their various responses, see Furgason, 2008).

However, the frequently noted 'death of the music industry' has been overstated: 'While digital configurations may allow for new means of distributing text, audio and visual content, they do not – and, we argue, cannot – fundamentally alter the music industry, which ... follows its own imperatives' (Burkart and McCourt, 2006: 7).

Certainly, the sound recording industry has shown a steady and marked decline, underpinned by two factors: the ongoing consolidation of the majors; and a precipitous fall in sales revenue in the US, down from \$14 billion in 1999 to \$6 billion in 2009 (Jones 2012). At the same time, however, we are consuming more popular music culture than ever before. As Jones (2012) puts it: 'people and businesses go on paying for symbolic goods in music on a vast scale.'

Further reading

- Burkart, P. and McCourt, T. (2006) *Digital Music Wars Ownership and Control of the Celestial Jukebox*, Lanham, MD: Bowman & Littlefield.
- Frith, S. (2007) 'The Industrialization of Popular Music', *Taking Popular Music Seriously: Selected Essays*, Aldershot: Ashgate (first published 1986).
- Furgason, A. (2008) 'Afraid of Technology? Major Label Response to Advancements in Digital Technology', *Popular Music History*, 3, 2: 149–70.
- Gebesmair, A. (2009) 'The Transnational Music Industry', in D. Scott (ed.), *The Ashgate Research Companion to Popular Musicology*, Farnham: Ashgate.
- Hesmondhalgh, D. (2007) *The Cultural Industries*, 2nd edn, London: Sage.

Hull, G., Hutchinson, T.W. and Glasser, R. (2011) *The Music Business and Recording Industry: Delivering Music in the 21st Century*, 3rd edn, New York: Routledge.

This is the most comprehensive overview available, based around the various income streams and with an emphasis on formal industry structures and practices; it includes extensive statistical documentation, informative case studies a useful glossary, and an associated website. It can be helpfully accompanied by looking at the account by Jones.

Jones, M.L. (2012) *The Music Industries. From Conception to Consumption*, Basingstoke: Palgrave Macmillan.

Jones focuses on the music industry as a process, rather than an institution; involving musicians, artist managers and music companies as 'they seek to convert original texts created by musicians into successful symbolic goods.'

Strachan, R. (2007). Micro-independent Record Labels in the UK: Discourse, DIY Cultural Production and the Music Industry, *European Journal of Cultural Studies*, 10, 2: 245–65.

The music press is essential to keeping up with current changes in the industry: *Billboard*, *Variety* and *Music Week*. Business magazine *Forbes* has included some useful material. Limited content can be accessed online, although fuller access is usually by subscription.

Websites

- The British Phonographic Industry: www.bpi.co.uk
- The International Federation of the Phonographic Industries: www.ifpi.org
- The IFPI promotes the interests of the international recording industry worldwide. Its members include over 1400 major and independent companies in more than 70 countries; it also has affiliated industry national groups in 48 countries.
- The Recording Industry Association of America: www.riaa.com
- The various 'majors' labels, along with many 'independents', have web sites.
- Live Nation: www.livenation.com