

International Journal of Music Business Research

Volume 9, Number 1, April 2020

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Editorial

Dennis Collopy & Guy Morrow¹

The April issue 2020 of the International Journal of Music Business Research (IJMBR) opens with the article "Music marketing in the digital music industries – An autoethnographic exploration of opportunities and challenges for independent musicians" by Shane Murphy. Through the use of an autoethnographic research method, Shane Murphy provides insights from the micro-perspective of an independent musician into the major major structural transformations that have occurred in the music business post-digitisation. Interestingly, while Murphy found that the opportunities to release and promote independent music are significant in the digital music industries (DMI), the widely touted Do-It-Yourself (DIY) approach is a myth; the labor required to make headway in the DMI has increased and it is too laborious for independent musicians to genuinely do everything themselves. Murphy argues convincingly that instead, the establishment of complex artistic and marketing partnerships with various intermediaries is necessary to compete in the over-supplied music industries.

Tim Metcalfe & Nicolas Ruth contribute the second article "Beamer, Benz, or Bentley: Mentions of products in hip hop and R&B music". According to this article, Beamer, Benz, or Bentley (Beamer is an American slang term for BMW), cars, fashion and alcohol are the types of products most frequently mentioned in hip hop and R&B lyrics. This is an im-

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portant study given that these genres are currently the most popular globally; the potential impacts of these products mentions are not well understood and so this study involved large-scale content analysis across the years 1990 to 2017. In doing so, this article provides a fascinating overview of product mentions present in hip hop and R&B lyrics across these years.

The third article – Dexter Purnell's "Closing the Gap: Understanding the Perceptual Differences Between Generations Regarding Music Streaming Technology" – focuses on the impact of music streaming technology and argues that, whilst music streaming has become the preferred method for recorded music consumption, there appears to be generational differences in the utilisation rate of the technology. Using a modified version of the Technology Acceptance Model (TAM), Purnell investigates the differences in the use of music streaming technology between digital natives and digital immigrants, which reveals statistically significant, albeit small, differences between digital natives and digital immigrants use of streaming technology.

Sam Edrisi's "Where the magic people gathered The Role of Private Members Clubs in the Contemporary Music Economy" is the award winning paper of the Young Scholars' Workshop 2019. It explores the increased popularity of a new type of private member club aimed at a crowd, which identifies with entrepreneurialism, independence, and creativity. The case study of one such club, Soho House, highlights its position as a primary meeting point for recording artists, managers, label owners and major record label employees to socialise with other members of the creative industries (CI). The member interviews and academic literature underpin his analyses of how the club has become pivotal in knowledge transfer between CI workers, who share a common language and behaviour and as well as tacit codes that work as anchoring points of the global creative economy.

This issue rounds up with a book review of "Rockonomics: A Backstage Tour of What the Music Industry Can Teach Us about Economics and Life" by Alan B. Krueger, who sadly passed away in March 2019. "Rockonomics" was Alan's last book in an outstanding body of works on

economic issues related to education, labor markets and income distribution. Thus, it was very beneficial that Alan B. Krueger also had a research interest in the music industry and, therefore, was an irreplaceable member of the music business research scientific community who did not just publish extensively on music industry related topics, but also established the Music Industry Research Association (MIRA) in 2017. It was a great honour that Alan – in collaboration with Marie Connolly – published one of his last articles in the IJMBR's October issue 2018 on "[The secondary market for concert tickets: theory and evidence](#)".

The IJMBR is aimed at all academics around the world, from students to professors, from all disciplines and with an interest in music business research. Interdisciplinary papers will be especially welcome if they address economic and business-related topics in the field of music. We look forward to receiving as many interesting papers as possible. Please send paper proposals to music.business.research@gmail.com.

Music marketing in the digital music industries – An autoethnographic exploration of opportunities and challenges for independent musicians

Shane Murphy²

Abstract

The digital music industries have encountered major structural transformations driven by a rapidly evolving new media environment and the evolution of music streaming as the dominant consumption format. Much analysis has been on broad macro issues driven by the concerns of major stakeholders such as record labels and music publishers. Through autoethnography, the micro-perspective of an independent musician is presented, highlighting the challenges of music marketing planning in a dynamic digital business environment. Future directions for independent music marketing practice are explored.

Keywords: Music industries, independent musician, digital marketing, social media, new product development, music business

1 Introduction

The Worldwide Independent Network (WIN) (2019) highlights the growing importance of the independent recorded music sector which is made up of smaller labels, micro businesses, and independent musicians. It states that the independent sector now represents 39.9 percent of the 17.3-billion-dollar global recorded music industry in 2018 (WIN 2019; IFPI 2019). The International Federation of the Phonographic Industry (IFPI) (2019) estimated that major record companies have only 7,500 signed artists on their roster globally. Most independent musicians will never be signed to a record label. In Australia alone there are over

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35,000 unsigned artists on independent radio station triple j's³ 'Unearthed' program and an estimated 95,000 songwriters and composers registered with the copyright collection agency APRA, the majority unsigned (APRA/AMCOS 2019; ABC 2019). Most of these independent musicians navigate the digital music industries (DMI), largely unsupported, especially in the early stages of career development (Morrow 2018; Hracs 2012; Anderton, Dubber & James 2012).

Independent musicians operate in a turbulent industry which has been undergoing major structural transformations since the arrival of digital piracy at the start of the 21st century. These include changing digital product formats; increased access to a larger global music catalogue at lower prices; the fragmentation of music broadcasting and media (from the dominance of radio and television to online and mobile alternatives); and the proliferation of new digital communication channels for music promotion (Dubber 2012; Ly 2012; Meier 2017; Baker 2018; Barnhart 2018; Armit & Oliver 2019). These changes have also happened in a relatively short timeframe compared to previous transitions in the music industry (Hesmondhalgh & Meier 2018; Hracs 2012; Ogden et al. 2011).

Much has been written about these changes at a macro level focusing on technology, its impact on changing consumer behaviour and the restructuring of the bigger music industry players such as major record and publishing companies, media companies and the overall economic paradigm shifts (Anderson 2004; Kusek, Leonhard & Lindsay 2005; O'Reilly, Larsen & Kubacki 2013; Coelho & Mendes 2019; Sun 2019; Tronvoll 2019; Miller 2019). Less is known of the impacts on the independent sector. Hesmondhalgh & Meier (2015: 95) point out the lowering of the barriers to entry that were evident in the traditional music industries has led to the emergence of many more smaller record labels and micro-independents catering to a wide range of music tastes and niche markets, coexisting side by side with the larger corporations and

³ triple j is a tax-payer funded radio station in Australia that broadcasts nationally. It is a part of the Australian Broadcasting Corporation (ABC) and is a youth focused station. Its branding policy requires its name to be stylised in lowercase letters (ABC 2019).

multinationals. Anderton et al. (2012: 36) define these micro-independent labels as "*small-scale businesses run from home by musicians and/or music enthusiasts*".

There is literature that has explored the necessity of musicians to adopt an entrepreneurial mindset to develop a music career (Blanning 2008; Cohen 1993). Hracs (2012) highlights the transition to digitally-driven music production and more recently Morrow (2018) expands on these ideas and explores agile management practices in a digital industry acknowledging the need for financial planning on limited budgets at the startup phase of artistic careers. There is also literature that explores the broader impacts of these digital transitions on independent artists and musicians (Stewart 2018; Armit & Oliver 2019; Prey 2019; Tronvoll 2019). This literature however, is limited in its exploration of strategic marketing principles from the marketing field and the relevant implications at a micro-level facing the growing number of independent, self-managed artists. One of the key business functions that record labels provide for new artists is marketing expertise and it makes sense to explore best practice in this discipline for independent musicians who may never be signed but are still intent on creating a sustainable music career (IFPI 2015; Miller 2019). Allen et al. (2016) offer some good applications from the marketing discipline addressing the research gap and this paper builds upon this approach. There are also a variety of online websites, podcasts and 'how-to guides' for marketing in the DMI which are useful as a valuable data source but lack the necessary academic rigor required for empirical research. Drawing on autoethnographic data, a multidisciplinary study is presented, integrating emerging themes and issues with these 'DIY' contemporary perspectives on independent music marketing. Relevant academic literature across multiple fields is also explored in order to develop a more robust investigation into the nexus of contemporary music, artistic process, and marketing processes in the DMI.

This paper explores strategic marketing insights into new digital music marketing techniques and provides a conceptual framework for new product development (NPD) in the DMI from the perspective of an inde-

pendent musician. It also builds on previous work by Evans et al. (2013) which explored artistic success indicators for the music industry and evolves a model on what it takes to become market-ready as an independent musician working in the DMI. Challenges include the difficulties in navigating the myriad of complex artistic and marketing partnerships necessary to compete in an oversupplied music marketplace. Furthermore, independent musicians must re-orientate themselves from an innate focus on songwriting and product development where they derive much intrinsic satisfaction, and become motivated to understand and implement sophisticated marketing processes that require learning new skills in strategic digital marketing and its associated technology (Caves 2000). There are increasing demands on independent musicians beyond their instrumental and musical ability (Evans et al. 2012: 6). Throsby & Zednik (2010) identify a lack of marketing skills and financial resources for artists promoting their work as being factors that inhibit artists' career development. This has significant implications for contemporary music educators designing programs that should cater to these skill deficiencies.

The opportunities and challenges facing all industry players in the DMI are vast and complex. The DMI is only at the early stages of development into the new streaming formats and related media ecosystems. Even less is known of the impacts of these changes on independent music marketing practice. Miller (2019) states that the fundamental principles of the music business; such as good songs, quality recordings, developing an artist brand and promoting this to an interested audience is the same but how it is done "*is nearly unrecognizable from just a decade ago*" (Miller 2019: 7). A thorough exploration of this uncertain business environment is critical in identifying strategic directions for the growing the independent sector moving forward. The autoethnographic process revealed a multitude of complex decision-making processes and workflows that may be evident when releasing an album in the DMI. It is beyond the scope of this paper to offer a detailed discussion of them all. Instead, this paper offers exploratory research into planning strategies for independent musicians in this new digital marketing environment. It

highlights new product development approaches and digital marketing techniques for building an online presence in the DMI.

2 Research background and scope

The research fields of this project are situated within the Centre of Excellence for Creative Industries and Innovation (CCI) classification of music and the performing arts and marketing and advertising, two different sectors within the creative industries (Cultural Ministers Council 2008). This research positions the creative practice of an independent musician as straddling these two disciplines. Independent musicians are focusing not only on song-writing and music production but also the development of professional marketing strategies. They do this to ensure the creative works they produce, can (hopefully) achieve a commercial return on investment and some form of career advancement. Blanning (2008) and Scott (2012) consider these independent musicians to be cultural entrepreneurs with a 'do-it-yourself' ethos; they create and perform their own music and "*self-manage the construction of a music industry career*" (Scott 2012: 238). However, more needs to be explored in terms of practical marketing strategies that will help independent musicians build and maintain sustainable careers. As stated earlier, independent musicians need marketing to be successful. Marketing includes the activities undertaken to create and exchange products and value with others (Kotler 2012). Music marketing, therefore, is defined as:

Those activities related to the development and creation of music products involving song-writing, recording, performing and branding music works; promoting, distributing and exchanging these works; to satisfy the needs for entertainment, identity and social-cultural connection and meaning (np).

The context of music marketing has changed with the digitization of the music industry. Wikstrom (2014) points out that the digital age of music has changed the music listening experience from "*playing music to playing with music*", highlighting the role of social media (Wikstrom

2014: 20). Miller (2019) points out that traditional PR methods have been replaced with innovative digital marketing initiatives powered by data analytics to extract insights. Music has always been a powerful expression of identity and self-expression. The evolution of digital media communications in a fragmented media landscape has seen the breaking down of cultural boundaries and the emergence of an international music market. While this autoethnography presents an Australian perspective, and may have more applicability for English speaking music markets like the US and the UK, the essential concepts in the models are still useful from an international perspective. Nuances in the digital music ecosystems in emerging markets such as India, Africa, and China should be considered for future research and I acknowledge research limitations in this regard. The following section presents the research methodology and rationale that will underpin the findings.

3 Methodology

This paper positions the creative practice of a self-managed, Australian independent singer-songwriter in the context of the DMI and the rapid technological and socio-cultural changes affecting it. Autoethnography is used to highlight a micro perspective on these industry transformations and guide the discussion. It explores key issues from a practice-based perspective that "*situates creative practice as both a driver and outcome of the research process*" (Hamilton & Jaaniste 2009: 1). It is an approach to research and writing seeking to describe and systematically analyze (graphy) personal experience (auto) in order to understand cultural experience (ethno) (Ellis et al. 2010). Autoethnography is a research method widely used in the study of human creativity (Pace 2012), and is an established methodology for arts and social science research especially in the analysis of complex creative and psychological processes (Reed-Danahay 1997; Ellis & Bochner 2000; Ellis, Adams & Bochner 2010; Chang 2008; Atkinson 2006; Anderson 2006). This methodology was selected specifically to take advantage of the unique analytical perspective I held. A twenty-five-year career as an independent musician and

over fifteen years of lecturing in the field of entertainment and digital marketing has provided much of the preliminary research into the topic. The practice-based approach in this study places me as a participant observer within the context of the international independent music community but also as a marketing educator in the DMI. Participant-observation techniques enabled me to become immersed in the community of study at a deeper level in order to gain a better perspective on what the members may be seeing. Participant-observation extends beyond naturalistic observation because the observer is a 'player' in the action (Barrett & Bolt 2010).

The grounded theory technique of comparative analysis was used to integrate a full literature review as the issues emerged, enabling the project to be reflective and informative and to offer greater explanatory power than methodologies based on a single discipline (Cheng et al. 2014; Strauss & Corbin 1994; Birks & Mills 2010; Goulding 2002). The salient attributes of grounded theory were used to code and categorize data collected through audio diaries, written memo's, email mining and through concurrent data collection during practice-based processes. Using constant comparative analysis, themes were categorised and further developed with the relevant literature (Birks & Mills 2010; Musgrave 2019).

The research builds upon and updates research findings discussed in my previous work which was an exegesis incorporating the development of key creative artefacts including a ten-track album and the planning process of associated branded marketing materials (Murphy 2015). This paper, therefore, uses the autoethnographic method to identify the key practical issues facing independent musicians writing, producing and releasing songs in the DMI and integrates these findings with a multi-disciplinary discussion of relevant literature with an emphasis on marketing principles.

There is some agreement amongst a range of authors that the processes of production and marketing of a creative project in the DMI can be understood effectively through multiple lenses and levels of observation (Anderton, Dubber & James 2012; Cheng et al. 2014; Collins 2010;

Glaser 1978). Anderton et al. (2012) suggest multidisciplinary approaches may offer new insights because they bring together a range of different academic disciplines that have the potential to reveal more nuanced and integrated insights about the different sectors of, and issues within, the broader music industries (Anderton et al. 2012: 21). This approach is also reflected in the work of Burnard (2012) and Williamson and Cloonan (2007) who recognized the need to approach studying the creative industries with more of a pluralistic perspective. The next section presents a discussion of key findings.

4 Key opportunities and challenges for independent musicians

This section discusses key findings in contemporary independent music marketing practice. The study identified the essential components to becoming market-ready in the digital age in section (4.1). Secondly, the necessity for marketing planning is highlighted by the importance of digital marketing research (4.2) and the application of a new product development (NPD) model for the DMI (4.3). Finally, an exploration of key digital marketing techniques as they relate to building an online presence in the DMI are introduced raising areas for future research (4.4).

4.1 Becoming market ready in the DMI

As stated in the introduction, most independent musicians will never be signed to a record label however for many independent musicians getting signed is an important goal. According to the IFPI (2012), the majority of artists still aspire to be signed by a record company. The most cited factors for wanting to be signed included promotional support (76 percent), tour support (46 percent) and payment of an advance (35 percent) (IFPI 2015: 1). The majority of independent musicians seek support for the necessary marketing, administration and management processes required to develop a career in the music industries. There are limitations of DIY career models because of time management and /or finan-

cial issues (Evans et al. 2013: 71). Music intermediaries take on different roles in the industry in order to fulfil some of these limitations in the skills and resources of independent musicians and to add value in the marketing channel and ultimately for end consumers (Pride et al. 2017). These intermediaries include traditional players such as record labels, music publishers, management companies, booking agents, recording studios, as well as digital players such as streaming services, online PR companies, website content management companies, email marketing systems and so on.

Many of these intermediaries and music companies in the DMI however are unwilling to invest resources in raw talent that has not yet been recorded or had some level of public success or proven track record. This is considered too risky in the face of an uncertain marketing environment. The DMI no longer supports the traditional business model of music companies developing an artist from the ground up (Donnelly 2014). Rather they have an expectation that independent musicians are already able to demonstrate some indicators of success or market readiness. Market readiness is a commonly known business term which is an assessment if a product, in this case, an independent musician and their recorded music offerings, is ready for commercialisation. Building upon previous research by Evans et al. (2013) into what constitutes the most important markers of success for independent artists and based on the data and experiences derived from the autoethnography, this study presents a market readiness model for the DMI in figure 1.

Firstly, an independent musician must have good songs and production. This relates to the disciplines of songwriting and music production. In the traditional music industry model, music production was only really accessible to those signed with recording deals at record labels (Hracs 2012, Miller 2019). This has changed in the DMI and advancements in technology have empowered musicians to be able to record at home studio's using digital audio work stations (DAWS) and release these songs internationally. It should be stated that access to technology does not necessarily result in quality recordings. High-level skills of producing, engineering, mixing and mastering are still required to compete effec-

tively. Additionally, another challenge is in the development of quality songs and having some sort of mechanism to maintain objectivity when developing a repertoire for the market. Traditionally this was handled by the Artists and Repertoire function of the label (A & R) but the challenge for independent musicians in the DMI is to develop a team around them that mirrors this function and assists in the songwriting and production processes. This could include feedback from other songwriters in the community, professional guidance in production and technical aspects of a mix and preferences on single selection for album releases. This is discussed in more detail in strategies for new product development in section 4.3.

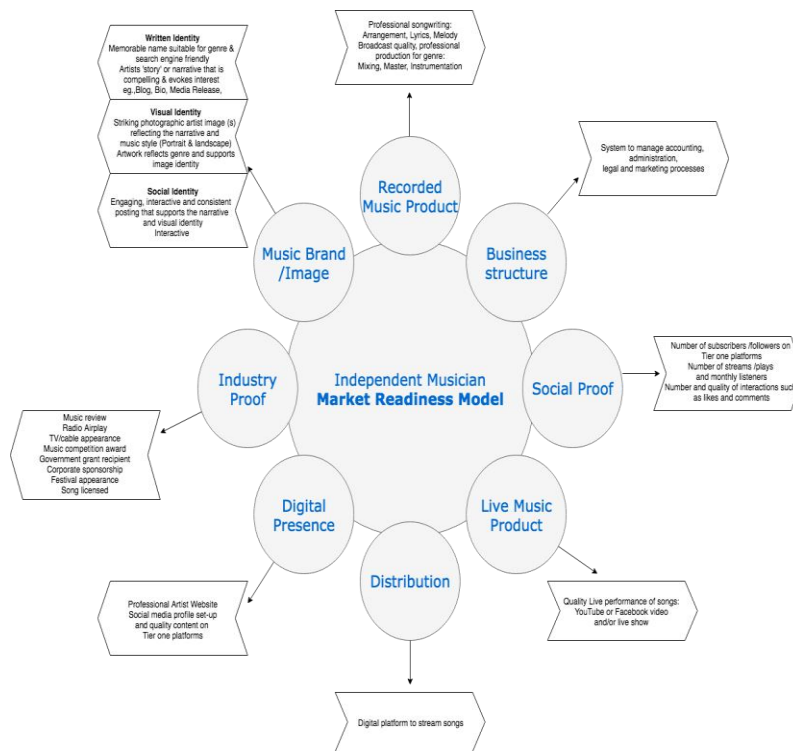


Figure 1: The independent musician – market-readiness model for the digital music industries

These songs need to be supported by a strong artist brand image. This should be genre-driven and needs to be self-assured and 'stand out from the crowd'. A striking professional photo, compelling and interesting artist narrative that is well written, and quality music is a good foundation not only for media exposure but also useful in developing a social media identity and presence (Gilks 2016). Again, what has changed in the DMI is the lowering of the barriers to entry to access user-friendly digital intermediaries such as Canva (for graphic design), professional photo editing tools and digital services like Fiverr (an online marketplace for freelance services), both enabling low-cost branding support services. In terms of narrative, a biography and media release were the prime story-telling tools but in the DMI the story and artist image should be extended into social media.

Social proof is measured in numbers, interactions, and streaming popularity (Meier 2017; Baker 2018; Barnhart 2018; Stewart 2018; Armit & Oliver 2019). Miller (2019) states that A & R teams used to review demo recordings physically sent in and they would scout live environments to source new talent. Now they sift "*through the enormous trove of new music and data online to find the right partner*" (Miller: 2019: 11). Current tier one social media platforms are generally ranked in terms of monthly active users and for independent musicians, the focus in terms of popularity is: Facebook, YouTube, Instagram, Tumblr, TikTok, Twitter, LinkedIn, Reddit, Snapchat, Pinterest (Lua 2019). These of course change over time, but the DMI requires that independent musicians have active artist profiles on the top three or four and some measure of social proof on these profiles. The quality of interaction and engagement for social proof is key to support the numbers because the illegal activity of buying 'fake' followers has become an issue in the DMI (Keller 2018). Increasingly, streaming platforms like Spotify and Apple Music are also becoming more 'social' through public play-listing and the sharing functionality of music listening behaviour and preferences on social platforms. Streaming numbers here also provide important social proof. This social proof serves as an indicator of popularity, legitimacy and overall influence in the market (Baym 2013a).

Industry 'proof' or recognition is also an important driver indicating market readiness. It can accelerate the market recognition of an independent musician. These industry players are also influenced by perceived social proof. Media outlets can preference coverage to independent musicians with more social proof because it demonstrates existing market interest. Industry proof validates the market readiness of an independent musician from important influencers and opinion leaders in the music business such as music reviewers, taste-makers, booking agents and music festivals. In addition, recognised music competitions and respected institutions such as government organisations may also support the early stages of independent musician development via government grants (Evans et al. 2013). Again, like social proof, industry proof from these various intermediaries reinforces the legitimacy of the artist.

One of the most powerful promotional tools for recorded songs is the live performance representation, which can be captured and shared digitally or in a physical environment. It is beyond the scope of this paper to explore the evolution of the live music industry market. However, the opportunity exists for an independent musician to take advantage of digital video making technology and editing software to produce a live representation that can be shared digitally. Most smartphones have these capabilities. This enables audiences and potential music business partners alike to get a feel for the live act without actually going to a show. It is also important as consumers are looking to the expressive function of the artist to derive symbolic utility and further express self-identity (Miquel-Romero & Montoro-Pons 2017).

A digital presence consisting of a professional artist website, social media presence and music distribution platform provides industry professionals and consumers with multiple avenues and channels to connect with independent musicians. A professional website is an important marker for market presence especially for media outlets seeking content for publication. It also serves as a key distribution point for music and merchandise. Augmented with distribution through music aggregation services like Tunecore and CD Baby this establishes a foundation for an

online presence for independent musicians. Finally, a business structure for independent musicians is mandatory to manage necessary transactions but also for the administrative organisation.

All of these markers require a significant investment of time, resources and skills across a range of disciplines. Independent musicians looking to surround themselves with a professional music industry team, a record company, or even to develop a career on their own terms, need to fulfil most of the above requirements with little financial support and in many cases limited skills and training (Evans et al. 2013; Hesmondhalgh & Meier 2015; Morrow 2018; Throsby et al. 2010). Becoming market-ready in the DMI requires the independent musician to create a business structure similar to a record label. The responsibility for the independent musician striving to be commercially successful with a limited budget, therefore, requires them to shift seamlessly between the role of a creative artist, musician, recording engineer, A & R manager, producer, record label, web designer, photographer, music video producer, graphic artist, artist manager, accountant, and marketer to name a few. Further research is needed into skills development required to support independent musician market readiness.

4.2 The role of digital market research for strategy development

Market research lies at the heart of the marketing concept which is a philosophy suggesting music business success relies on understanding consumers and their needs and wants. It is a central consideration when planning and implementing marketing strategies (Pride et al. 2017; Kotler et al. 2017; Allen et al. 2016). Market research is a process of collating information for decision making. It provides information to identify and define marketing opportunities. Price Waterhouse Coopers (2019) highlight that music companies are increasingly turning to digital data-analysis as a way of developing targeted marketing campaigns. They are also beginning to see ways in which fan data can be used to drive tailored promotions to better engage consumers. Getting this analysis right will have positive repercussions for recorded music revenue.

Independent artists are starting to value this use of data to guide strategy. An early pioneer of this approach was Trent Reznor. As an independent artist, co-managing the band Nine Inch Nails he gave away a copy of his album *Ghosts (I-IV)* but in order to get the album, consumers were asked to complete a large survey that was later used to develop a detailed fan database. Additionally, he used internet data aggregation and a collation service to map where downloads were occurring and then set up a tour based on this data (Masnick 2009). These days streaming platforms such as Spotify offer very sophisticated analytics to independent artists that can similarly be used to plan music tours and social media analytics tools can be used to guide social media posting activities and digital advertising to leverage popular markets (Prey 2019). Other key analytical tools identified in the research were:

- the importance of the Facebook pixel to measure the success of paid sponsored posts/advertising on Facebook (Mchenry 2019);
- Google analytics and search console to monitor web traffic and improve and optimise website design and content for search (Chaffey & Smith 2017), and;
- social media insight and analytics tools to enable independent musicians to evaluate and improve the content presented to fans to elicit more engagement (Barnhart 2018).

Digital song review platforms like Reverbnation 'Crowd Review' can also be useful for determining which songs to select as singles based on ratings (Reverbnation 2019).

Categorization and an ethnographic analysis of the genres not only from a musical perspective but from a marketing perspective is also an important preliminary research task. An artist exploring career opportunities in the commercial pop market, for example, will need to adopt different strategies in terms of brand image, record production and promotion to that of a country or rock artist. From a digital perspective,

the following decisions are significantly affected by the identification of genre for an artist:

- Choosing the right producer, studio, songs and musicians to help position the artist in the genre and relevant playlist categories on streaming services.
- Targeting appropriate online publicity and review sources such as music blogs for editorial and reviews as well as radio.
- Distribution – including the right meta-tags (digital identifiers) to identify the music in a digital context and receive compensation from performance and communication rights.
- Online advertising – for relevant ad-word campaigns that are based on genre keywords for search marketing campaigns and also to assist in targeting in social media advertising for more relevant messaging.
- Search engine optimisation strategies for the artist website. Genre keywords may need to be used in developing the metatags and content to increase search engine visibility for the artist.

In any business, to be commercially successful requires a sound understanding of the marketplace you intend to operate in. Even more so with an industry undergoing such rapid transformations. Developing sound market research techniques and understanding the role of these insights and analytics to fine-tune not only music production approaches but also artist branding, promotion, and music distribution, increases the likelihood of success in the DMI. These digital market research techniques are an essential component of the marketing process that guides the new product development process now discussed.

4.3 New product development for the DMI

The new product development (NPD) model is a framework from marketing literature laying out a process for developing and introducing new products to the market (Cooper 1983). Originally developed for the industrial product manufacturing sector, the NPD model also provides planning insights for independent musicians operating in a business environment of extreme uncertainty. Caves (2000) highlights the risk inherent in creative art production: "*there is great uncertainty about how consumers will value a newly produced creative product*" (Caves 2000: 2) and the "*risk associated with any given creative product is high*" (Caves 2000: 3). It is synchronous to contemporary research by Morrow (2018) who discusses the lean start-up method (LSM) as a business approach reducing risk in the arts sector, which has its origins in entrepreneurial and management literature. The NPD model has had some applications in arts management (Brown & Eisenhardt 1995; Moorman & Miner 1998; Kerrigan, O'Reilly, vom Lehn 2009; Ripley 2015) but limited applications in the DMI. In terms of applying the NPD model to the arts, Crealey (2003) points out "*while it is clear that existing models are not perfectly suited to the arts, the stages or key issues that they embody do have relevance for new arts products*" (Crealey 2003: 26). This model has been adapted and depicted in Figure 2 as a key outcome of the research. Part of the relevance of the NPD model is the idea that with careful planning and consideration music business owners can reduce the risk of investing in new music products that may fail and develop a more strategic approach to releasing music successfully in the DMI.

The NPD model is useful for an independent musician releasing music in the DMI because it embraces a strategic approach that considers both artistic and marketing processes and the nexus of these. This is also supported in the work of Bilton & Leary (2002) who highlight creative processes should not be considered separate from management and marketing processes. The NPD model in figure 2 represents a complex set of interrelationships and psychological processes and highlights new integrated approaches in music marketing. This model speaks to the necessity for strategic marketing considerations throughout the pre-

production and production processes as opposed to being an after-thought later on.

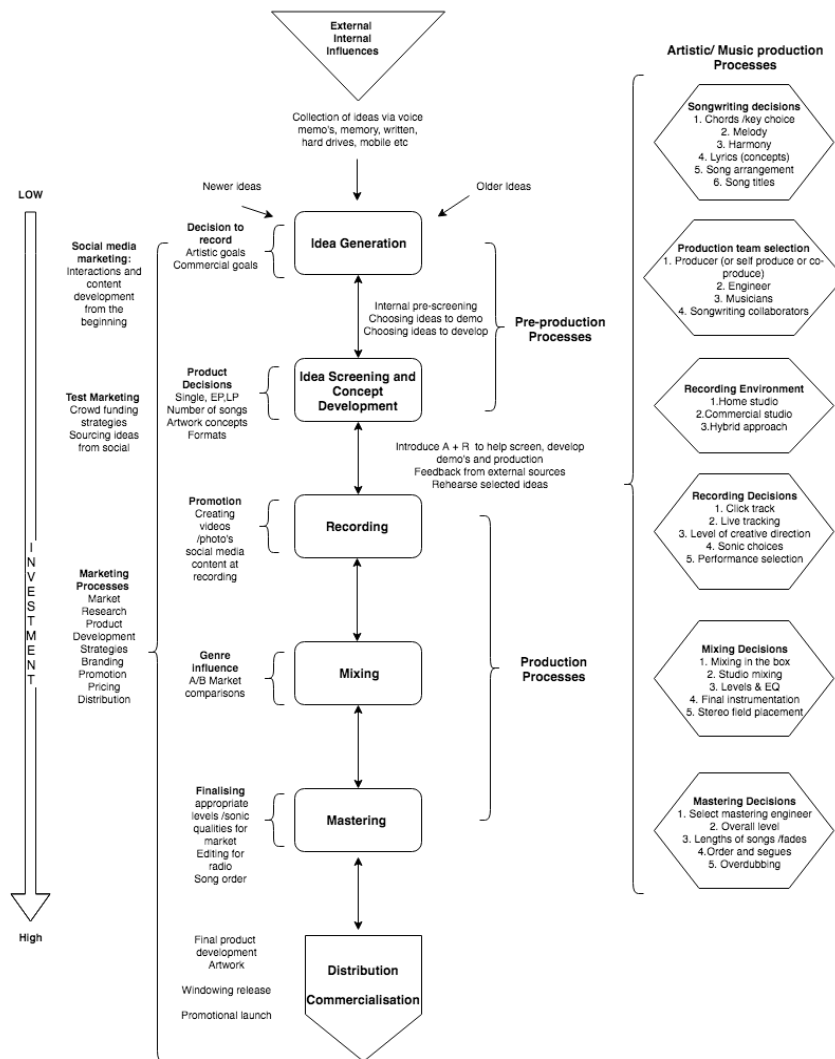


Figure 2: The adapted NPD model for independent music marketing

Many independent artists allocate most of their budget on the music product and only have limited funds available for its promotion. There are a lot of management and marketing tasks to be performed beyond the music creation phase that for many artists can be seen as a necessary evil (Caves 2000). Section 4.1 highlighted the need for social proof and a professional online presence in the DMI. This requires time, skills and financial investment. *"Promotion should be the largest part of the indie artist budget and yet it is the most overlooked"* (Dwinell 2014). Hesmondhalgh (2007) points out cultural industry production focuses on the stages of creation, production, and marketing but rather than being a factory production line, these stages often overlap. Traditional marketing approaches in the past have relied on producing an album and then developing a marketing strategy once finished (Ogden et al. 2011). This traditional marketing approach is now being superseded. The digitalisation of the music industries is requiring more modern approaches that see the marketing process begin even before the creative work has begun (Padgett and Rolston 2013). Kotler, Kartajaya, Hooi (2017), share this view of involving the consumer early on in the NPD process and highlights co-creation in the ideation stages can *"improve the success rate of new product development"* (Kotler et al. 2017: 50). This can involve asking fans for song idea input, collaborations with fans on song topics, sounds, lyrics and so on. Internationally recognised independent musician Imogen Heap was an early pioneer of this approach. She asked fans to submit sound-bites, and add words to a 'word cloud' to inspire lyrics and within a week pieced together a song using her fans' uploaded sounds, words and *"created a corresponding video that drew from submitted animation /film projects"* (Lipshutz 2011).

Consumers are now seeking more intimate connections with independent musicians, especially in social media. Connections not only focused on the utility of music but also in the inspiration and sharing of the artist's journey and identity, where they derive social and cultural meanings (Stewart 2018; Gilks 2016). Baym (2013b) also investigated these new interactive relationships between fans and artists and point out it resembles more of a community that provides social utility that aug-

ments the satisfaction derived from the music and in some cases, is regarded even more important. Miquel-Romero & Montoro-Pons (2017) also echo this suggesting that the expressive functionality of music can take precedence over any other consideration. Therefore, there is an opportunity for independent musicians to generate awareness and demand for their music during both the pre-production and production phases of the NPD model (Morrow 2018; Barnhart 2018; Baym 2013b; Moisio and Rökman 2011; Salo, Lankinen, Mantymaki 2013). It should be noted however that interactive approaches usually work better after an independent musician has already released some music and has some existing market awareness. Stewart (2018) makes the point that the music often introduces the artist to the audience and once the fan is in the know about the act the *"research indicates the focus switches towards meditated engagement with the artist's persona"* (Stewart 2018: 74).

The marketing processes arrow begins in this first stage and it is important to locate the product development within the market place such as the genre, potential playlist or radio station and country, as this may affect songwriting approaches and approaches to music production in the following stages. Section 4.1 also discussed the importance of this from a marketing perspective in terms of branding, tagging and search engine optimisation. Indeed, it is proposed prior planning acknowledging the whole process of marketing (from product development to distribution and promotion) helps independent musicians focus their limited time, energy and resources to gain not only higher quality music products, but also increase the quality of the associated branded promotional materials useful for preliminary promotional efforts. An example of this may be the artist releases video and/or images in the writing phase, stimulating initial interest, and then use behind the scenes videos/photos of the recording process to post on social media platforms before the production is even released. This creates 'buzz' and in turn increases the chances to gain recognition and build social proof in an increasingly competitive marketplace. Furthermore, a well-planned production phase could also result in footage for music videos, photos for

publicity, behind the scenes interviews and the development of a narrative for the song or album important for content marketing purposes (Gilks 2016).

These marketing considerations may also impact on all the individual production choices outlined on the right-hand side of figure 2. For example, songwriting choices may be affected by social media interaction, a recording studio may be selected because it offers good filming locations, production members may be selected because of their artist personas and so on. Investment also starts increasing as concepts are developed, and the budget is then applied to production and marketing processes as the project moves closer to commercialisation and the money required to launch it internationally. Independent musician budgets, therefore, should consider product and promotion costs at the pre-production, production, and distribution and phases of the NPD model. According to the IFPI (2019) record companies invest just over a quarter of industry revenues (26 percent) back into promotion. An independent musician should also look to invest at least a quarter of the total investment into the promotion of the final work. Even more considering the limited established industry networks they may have in place as opposed to the major labels.

Another benefit of engaging with marketing processes at the pre-production phase is to take advantage of crowdfunding opportunities. Crowd-funding is a form of collective financing (or micro-patronage) and it allows consumers to effectively 'sponsor' artists at the pre-production phase. Crowdfunding can give artists greater control over their project (Allen et al. 2016). An independent musician with a large, engaged social media network of fans can obtain financial support by pre-selling an album to their network or offering other incentives, in some cases only based on a concept or demo recording (Armit & Oliver 2019; Scherer & Winter 2015).

According to the NPD model, idea generation refers to the systematic search for new product ideas (Kotler 2012) which for an independent musician may be influenced by external factors such as the social, political and cultural environment, friends and peers, as well as music

influences. Idea generation may also come from new or old song ideas and various digital recording archives. Following from this is a screening process of which song(s) to pursue for concept development. The value an independent musician puts on some songs over others may be different from what the end consumer values and what the market considers commercial (Caves 2000). If the creative process is considered a separate to the marketing process there is a risk this may be prioritised over potential commercial gains (Fillis 2006; Hirschman 1983). Levitt (1960) first introduced this idea of marketing myopia, which focuses on the needs of the company over the needs of the consumers. For independent musicians, this presents a real challenge because of the intrinsic satisfaction gained from 'consuming' their own creative output. Hirschman (1983) raises this issue of the artist being the primary consumer, and Fillis (2006) suggests the value artists gain in creating the work may outweigh the financial returns gained from a third party or at least affect the motivation to pursue these gains. So, despite the significant opportunities in the DMI, many independent artists find it difficult to allocate the necessary time and resources to the branding and promotion tasks because of a lack of motivation, skills, and passion for this area of practice. One of the key challenges for independent artists is not getting preoccupied in artistic processes focusing on songwriting and recording only. Although essential for potential success, the DMI demands attention beyond the songwriting and music production processes and into branding and promotion especially in social media.

Idea screening, concept development and even production can also be improved if independent musicians organize a team around them to mimic the A & R function of record labels as discussed in section 4.1. In the DMI, there are a number of services assisting this function. My own A & R activities included sharing works in progress with a team of friends, musicians and songwriters using tools like Google drive and Dropbox and even email and SMS. Streaming service SoundCloud has a privacy setting enabling sharing and feedback from industry connections. Mobile apps such as audio recording functions on smartphones enable quick recording and sharing capabilities and lyric note-taking

ability. The evolution of home studios and affordable digital audio workstation (DAW) technologies discussed earlier has significantly helped the processes in this stage (Zager 2012; Reynolds 2014; Fountoukidis 2015). Kotler (2012) draws the distinction between ideas and concepts stating: "*a product idea is an idea for a possible product that the company can see itself offering to the market, whereas a product concept is a detailed version of the idea*" (Kotler 2012: 262). Ideas for musical works need to be refined and developed because they will be judged by the listener and a low level of production may impact upon how the idea is interpreted. The quality of these new DAW technologies may even result in the utilisation of tracks in the final production and release.

The timing of distribution and its associated promotion also needs mentioning. It is important to realise a music release will only be 'new' for a short while. New releases can end up on top of the 'in-box' of marketing intermediaries or as a 'new release' for new music streaming playlists. Exclusives with music blogs or YouTube channels are also leveraged to extract more attention. Currency is important. When a date of release is established, the most intense roll out of promotional activities should be conducted at this time (Chertkow 2012; Allen et al. 2016). Releasing just a single song off an EP or album allows this to be the 'new' thing and can allow the independent musician to have multiple waves of publicity for the release. It is especially good for radio promotion (terrestrial or digital) as there is no guessing for music programmers on what song to play. The single-by-single approach to marketing versus album releases is an area worthy of further investigation and is an emergent theme in the literature (Woodworth 2012). Windowing is the concept of releasing content in different distribution channels in a phased schedule (Oszajca 2015). Usually, this involves having music and specialty merchandising 'bundles' first available exclusively to a mailing list. It could also involve streaming exclusives in blogs or other music services. In this phase, the streaming of songs should only be limited and not on the major services (Chertkow 2012). This pre-release window may only last 2-4 weeks. It may also be available for digital download services like Bandcamp and iTunes (in the past). Apple (2019) has now officially an-

nounced the closure of iTunes downloads highlighting the aforementioned transition of the ownership product format to the access model via streaming (Bakare 2019). The last 'window' sees the full release available on all major streaming services and in all retail outlets. This helps maximize physical sale revenues and merchandising bundles minimizing possible negative sales effects of streaming (Parc & Kawashima 2018).

With distribution comes the most concentrated promotional phase, acknowledging that promotional opportunities also begin at the early stages of the NPD process. A full discussion of digital promotion in the DMI is beyond the scope of this paper but an important topic for future research. I acknowledge research into the DMI is limited in its integration of the theories and concepts of commercial digital marketing practice. The next section introduces some key aspects of building an online presence for the DMI highlighting areas of future research.

4.4 Building an online presence in the DMI

As discussed in section 4.1, an online presence with a compelling visual identity, written narrative and interactive social media presence is an important indicator for market readiness. Essentially, there are three important aspects to this process. Firstly, setting up an artist website and the social media accounts, optimised with appropriate images, headers, descriptions, and contacts. Secondly developing and posting consistent, engaging content that supports the artist's brand image and narrative. Finally engaging digital marketing techniques to drive traffic to the website and relevant social media platforms.

The key opportunities include using content management systems (CMS) to efficiently manage website content (Chaffey & Smith 2017), an email marketing system (EMS) to manage mailing lists (Mchenry 2019; Oszajca 2015; Vaynuerchuk 2018), a social media presence on leading platforms (Baker 2018; Allen et al. 2016) and budget allocated to paid media campaigns including search strategies via Adwords and paid social media campaigns on the leading platforms. More recently Spotify has

also introduced advertising options for independent artists via intermediaries such as CD-Baby.

Vaynerchuk (2018) a leading international thought leader in social media strongly advocates the use of paid social media campaigns on Facebook, and Instagram to generate awareness, traffic and conversions. Strauss (2014) discusses the strategy of either appearing high on a search engine results page 'organically' or using ads on search engine sites to generate click-throughs (Strauss 2014: 474). Signing up for a Google Adwords account allows an artist to research popular key word searches and monitor trends in what words people use when searching for music. To gain a high rank on the search engine results page organically the independent musician may try and optimise for relevant genre key-words, such as in the case of my own release, 'Folk-rock and Australia'. The unique spelling of my artist name for example allowed a ranking at the top of an organic search for the artist 'Cheyenne Murphy'. This search engine optimisation strategy can influence the independent musician's artist name choice.

Digital marketing tools need to be designed to support the conversion of passive engagement into action and interaction as measured by conversions. Conversion focuses on the proportion of web visitors who actually take an action on a website, email or in social media and is important in establishing an online presence (Strauss and Frost 2014; Mchenry 2019; Baker 2018). The key conversion elements in the native environments of each social media platform are things like: views, followers, likes, comments, mentions, and subscribers. This fosters communication and closeness between artist and fan and enables notifications of content activities and uploads to be more visible to the fans. Conversion on a website may include a mailing list signup or song play and email conversion occurs when a reader clicks on a hyperlink in the communication as an action. Conversion prompts are important in website design and also social media marketing (Baker 2018; Chaffey & Smith 2017; Mchenry 2019). Another key traffic building source is digital publicity which includes earning editorial in digital websites, participating in discussion forums around the music genre (leaving music link ex-

amples), collaborations with other artists, and getting interviewed on podcasts, blogs or video interviews. This draws on traditional methods of gaining music publicity but in a digital environment (Allen et al. 2016). Further research into these digital marketing techniques is necessary for important skills development not only for the independent musician but for educators and practitioners in the creative industries more broadly.

5 Conclusions

This paper explored key challenges and opportunities facing an independent musician in the digital music industries (DMI). Limitations with the method of autoethnography should be acknowledged. Despite its growing popularity as a research method to provide insights into human creativity (Musgrave 2019; Pace 2012; Williams 2018), a critique of this method is that it relies on personal experience rather than empirical scientific data (Anderson 2006; Méndez 2013). An effort has been made to integrate and explore emerging themes with the engagement of relevant literature and examples. However key findings could be tested in the future with the collection of more case study data, in-depth interviews and broader industry perspectives from lead users to further contextualize the findings and evolve the conceptual models.

While the opportunities to release and promote independent music in the DMI are significant, this study establishes that the widely touted DIY approach does not really exist. Instead, the establishment of complex artistic and marketing partnerships with various intermediaries is necessary to compete in the oversupplied music industries. Traditional intermediaries such as radio are still important players in the marketing of recorded music in the DMI. The power structure of the industry has shifted however, more into the hands of consumers with the increasing importance of social proof and consumer-driven streaming playlists. Independent musicians are now accessing sophisticated recording and production technologies that were previously inaccessible in the traditional industry. Digital streaming services are becoming more aligned with the independent sector and the dominance of the major labels

driving airplay and owning presence in media outlets has weakened somewhat, providing opportunities for independents to gain more visibility in both traditional and non-traditional media. The gatekeepers of old have less influence in the DMI. The playing field has levelled considerably however in terms of scalability, industry expertise and global presence, the major labels still reign (Miller 2019).

From this research, it is clear that a multi-disciplinary skill set is required by independent musicians that not only focuses on musicianship, songwriting, and production but also a sophisticated understanding of the information technology, business management and digital marketing principles that drive the DMI. One of the key challenges for independent artists is not getting preoccupied in artistic processes focusing on songwriting and recording only. Although essential for potential success, the DMI demands attention beyond the songwriting and music production processes and into branding and promotion, especially in digital marketing and social media. An independent musician can reduce the level of commercial risk by embedding commercial considerations within the creative development of musical works. This has implications for educators in contemporary music practice. A lack of formal training or skills in marketing can create serious limitations for independent musicians who may not have the budget to outsource these skills to intermediaries. Despite the new opportunities presented by the digital age, the music business remains inherently risky. For an independent musician wanting commercial success in the DMI, it requires the ability to develop necessary technological skills to save money by producing music in home studio environments but also to develop and manage sophisticated digital marketing tools, such as content and email management systems, social media profiles and analytics, search marketing methods, and complex digital advertising techniques.

This practice-based research project demonstrated that commercialising creative musical works is a demanding occupation, requiring long hours and significant monetary investments for an uncertain financial return. For many independent musicians, it can prove to be overwhelming. Issues of self-confidence, lack of sufficient time and funds,

lack of motivation and also necessary marketing and business skills can combine to undermine the likely success of an independent music release. However, those who embrace their creative prowess, their online presence, and independent music marketing practice, and can transcend any conflicts between artistic and marketing processes, will be more empowered to gain a competitive advantage in the new digital music industries.

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Beamer⁴, Benz, or Bentley: Mentions of products in hip hop and R&B music

Tim Metcalfe & Nicolas Ruth⁵

Abstract

Mentions of commercial products are common in hip hop and R&B lyrics, relative to other genres of popular music, although the potential impacts of this are not well-understood. Since these songs reach millions of people daily, it is pertinent to study the nature of these product mentions – in turn facilitating further research on their effects. In order to provide an overview of the product mentions that are present in hip hop and R&B lyrics between 1990 and 2017, we undertook a large-scale content analysis (N = 2,650 song lyrics). Mentions of products were frequent, and the types of products being mentioned remained mostly consistent (predominantly cars, fashion and alcohol), although the rate increased dramatically over time. Most mentions were of high-end brands and were framed neutrally. Overall, lyrics mentioning products contained more diverse vocabulary and were much more likely to mention money. These findings are interpreted in relation to prior research and the music business in general.

Keywords: Popular music, lyrics, product placements, advertising, content analysis

1 Introduction

The nature and effectiveness of product placements is well documented (Karrh, McKee & Pardun 2003). Product placements can occur in all media types (Storm & Stoller 2015) and achieve their effect via a brand or product appearing repeatedly within a particular positive context, thereby encouraging an implicit association between the context and

⁴ Beamer is an American slang term for BMW.

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the product itself. There are various theoretical explanations for this effect, like conditional learning (Schemer et al. 2008) or the mere exposure effect (Matthes et al. 2012). Evidence also suggests that product placements significantly improve recipients' recall of the advertised objects (Gupta & Lord 1998). Product placements provide excellent value for money – requiring a one-time payment for a movie, series, or game, that may be consumed over many years (Jusufovic Karisik 2014). Additionally, they may be more intimate or engaging than regular advertisements – since they are less disruptive to the audience's experience (Craig et al. 2017) – while subconsciously leading to increased purchase behaviour (Johnson & Lehmann 1997). Conversely, however, studies have shown that product placements can lead to adverse reactions if implemented too conspicuously (e.g., Brennan, Dubas & Babin 1999). Indeed, myriad aspects influence the effectiveness of product placements, including modality (Law & Braun 2000), frequency of exposure (Schemer, Matthes & Wirth 2007) and plot integration (Russel 2002).

Much of the discourse surrounding product placements has tended to focus on film, television and music videos, while far less is known about product placements in song lyrics (Ferguson & Burkhalter 2014). However, listening to popular music is an enormously common everyday activity (North, Hargreaves & Hargreaves 2004), especially among adolescents and young adults (North, Hargreaves & O'Neill 2000), for whom it is thought to be particularly important in fulfilling both social and emotional needs (Tarrant, North & Hargreaves 2000; Randall & Rickard 2017). In fact, the formation of identity during adolescence is thought to be influenced by (among other factors) interactions with both popular music (North & Hargreaves 2008) and with brands (Elliott & Wattanasuwan 1998). Adolescents are therefore a major target group for many marketers, and tend to listen to music (primarily popular music) for an average of almost eighteen hours per week and up to an average of four hours per day (IFPI 2018; Williams, Geringer & Brittin 2019).

In recent years, companies have begun to invest in reaching potential customers via this medium (Craig, Flynn & Holody 2017). Simultaneously, the music industry has struggled to stabilize its revenue since the

advent of digital streaming (Ruth 2019a; Wlömert & Papies 2016), compounded by losses resulting from the file-sharing era (Oberholzer-Gee & Strumpf 2016). In response to this, both management companies and musicians themselves have begun to explore novel strategies to increase their revenue (Gloor 2014; Haynes & Marshall 2018). Since it is common practice to use musicians as testimonials (Klein 2009) or to place products and brands in music videos (Burkhalter & Thornton 2012), one might reasonably expect to find paid product placements in song lyrics (Abrams 2018; Nicholson 2015).

However, while there is evidence that companies pay for brand or product placements in songs (Allan 2008; van Buskirk 2008), these are difficult to distinguish from voluntary, unpaid mentions that occur without any advertising deal (Kaufman 2003). Indeed, mentioning specific products may serve many different purposes, for example providing descriptive detail, or indicating membership of a particular demographic group. For this reason, the term "product mention" is hereafter preferred, instead of "product placement", wherever there is ambiguity regarding a songwriters' motivations.

Aside from their literal meaning, song lyrics in popular music serve many potential purposes including expressing social, economic, and political narratives (Friedman 1986; Frith 1986), and evoking emotions in the listener (Ransom 2015). Within an advertising context, lyrics may also be important in fostering favorable attitudes towards brands (Chou & Lien 2010). Most investigations of popular music lyrics have relied upon some form of content analysis, in order to identify and characterise themes or subjects in lyrics (e.g. Henard & Rossetti 2014; Ruth 2019b). Various studies have also examined more specific, topical themes, particularly those related to antisocial behavior, such as drug use (Inkster & Sule 2015), sexualization (Cougar Hall, West & Hill 2012), and violence (Primack, Gold, Schwarz & Dalton 2008).

Although several studies have investigated the interaction between music and the advertising industry (for an overview, see Ruth & Spangardt 2017), only a few studies thus far have focussed specifically on products and brands mentioned in song lyrics. For example, Craig &

Bichard (2014) examined lyrical product placements cross-culturally, reporting much greater prevalence in popular music in the USA, relative to both Europe and Japan. More recently, Craig, Flynn & Holody (2017) investigated the frequencies with which both products and celebrities were mentioned in US top 20 Rap, Country, Hip Hop/R&B, Adult Contemporary, Rock, and Pop songs between 2009 and 2013. Product mentions were present in over 50% of the songs. Importantly, compared to the other genres included, many more product mentions were found in rap lyrics (73% of songs analysed contained at least one mention) and hip hop/R&B lyrics (52%). Interestingly, hip hop and R&B fans – particularly those identifying strongly with hip hop culture – appear to be generally accepting of brands and products as cultural goods, where these are perceived as congruous with the song (Ferguson & Burkhalter 2014). In any case, the relative prevalence of product mentions in this genre makes it particularly suitable for the further investigation thereof, which was the primary motivation for the current study's focus on hip hop lyrics.

A second motivation for focussing on hip hop lyrics was the sheer popularity of this genre in recent years. Hip hop and R&B music is a multi-billion-dollar industry (Burkhalter 2012) – in 2018, "hip hop & R&B", accounted for 25.6% of US music consumption, making it the single most popular musical genre (Nielsen 2018). In fact, of the four songs to surpass one billion digital streams in 2018, all four were performed by hip hop artists. Since these songs reach millions of people every day through radio, music streaming and personal music collections (Krause & North 2016), it may be useful to better understand product mentions in hip hop and R&B lyrics, thereby facilitating future research into their effects. The primary aim of the current study was to identify how often products are mentioned in hip hop and R&B lyrics, and to characterise the nature of these mentions. The study examined how products were framed (i.e. in terms of valence) along with which product categories were prevalent and how the frequency of product mentions changed over time. By using an automated approach for the collection and processing of song lyric data, the current project expanded the scope of previous studies

considerably, by analysing a much larger corpus of lyrics, spanning a longer period of time.

2 Hypotheses

Research indicates that product mentions and/or placements are accepted in hip hop and R&B music because its audience is highly brand-aware and because branded products are viewed as cultural signifiers (Ferguson & Burkhalter 2014). Since hip hop and R&B (and by association hip hop culture) has exploded in popularity in recent years – leading to the emergence of new subcultures – it is reasonable to assume that cultural signifiers are both increasingly relevant and increasingly well-understood. Additionally, product mentions may help to establish a sense of the songwriter's identity, helping them to stand out, which is important given the increasing number of active hip hop artists. Indeed, in a longitudinal study of product mentions, de Gregorio & Sung (2009) found evidence of a large increase in their frequency over time, particularly from the mid-1990s onwards. For these reasons, it was hypothesized that, in the current sample, the frequency of product mentions would be positively correlated with year of release.

Considering the types of branded products being mentioned, Craig & Bichard (2014) found that the most frequent category was clothing, followed by vehicles, food and alcoholic beverages. Similarly, Craig et al. (2017) reported clothing as the most mentioned product category, followed by vehicles and then media. By contrast, with a less recent sample of lyrics (largely from 1995-2002) de Gregorio & Sung (2009) showed that vehicles were the most frequent category. In accordance with this, Mohammed-Baksh & Callison (2014) found that between 2008-2011, the most prevalent categories were vehicles, alcohol, fashion and entertainment.

In light of the above, it was hypothesized that the most commonly mentioned product categories in the sample of lyrics studied would be cars, fashion and alcohol. However, given the time period examined in the current study it was hypothesized that the popularity of these cate-

gories would have fluctuated over time, reflecting both cultural and socioeconomic changes, as well as the shifting thematic concerns of hip hop and R&B artists.

Although the valence with which products are mentioned can affect listeners' appraisal and recall thereof (Delattre & Colovic 2009), research has yet to elucidate how product mentions tend to be framed. Considering product mentions as cultural signifiers (Ferguson & Burkhalter 2014), their purpose is essentially descriptive, and therefore there is little reason to assume that they should be strongly valenced. Accordingly, it was hypothesized that the majority of product mentions would be framed neutrally. By contrast, it could be expected that paid placements would be almost exclusively positive (this is strictly an assumption, however, owing to difficulty in differentiating between product mentions and paid placements).

Lastly, it was hypothesized that the content of lyrics mentioning products versus those not mentioning products might differ in other important ways. Again, assuming that product mentions fulfil a descriptive function (Ferguson & Burkhalter 2014), it was predicted that the overall diversity of vocabulary may be greater for lyrics featuring product mentions (reflecting more descriptive language in general). Considering the potential role of product mentions as signifiers of social status, it was additionally expected that lyrics containing mentions would be more concerned with the self, and would be more likely to use language related to money.

4 Method

To capture a representative sample of popular hip hop and R&B music, Billboard year-end data were used, consisting of the one hundred best-selling singles for each calendar year. Metadata about all the songs featured in Billboard's "Hot R&B/ Hip-hop" year-end charts between 1990-2017 (N = 2,650) were retrieved from billboard.com, using Python. For each song, the title, artist(s), year of release and chart position was recorded. Using these data, a second Python script was written to down-

load the lyrics for each of these songs from genius.com. All lyrics ($N = 2,647$, since three were unavailable) were processed to remove any meta-lyrical information (e.g. section tags such as "verse" and "chorus"). In total, these data comprised lyrics from 2,314 unique songs (excluding duplicates, appearing in multiple years' charts) by 939 unique lead artists⁶. Billboard makes no genre distinction between hip hop and R&B for individual songs, although 49.65% of those studied contained at least one rapped verse (verified manually via listening to each song).

Lyrics for each song were analyzed manually, independently by the two researchers. A product mention was considered to be any mention of, or unambiguous allusion to, a branded, commercially available product. References to generic types of products (e.g. "car", "shoes"), or instances where the exact product was otherwise ambiguous, were ignored. Every product mention fulfilling these criteria was recorded, along with information about product type (the broad class of goods/services to which the product belongs) and valence (whether the product was referred to positively, negatively or neutrally). In order for a mention to be categorized as positive or negative, the framing had to be explicit (i.e. the artist clearly states that they like the product, or asserts that it possesses some desirable quality). For example, the following product mention (Levi's) was coded as positive:

"501s on, gangsta lookin' good" (Snoop Dogg 2009)

Interrater reliability between the two researchers' ratings was high. The year 1998 was chosen at random as a subset of the full data set, and all lyrics from this year ($n = 100$) were analyzed by both researchers. Agreement was 92.45% for the product placements recorded, and 98.11% for the valences thereof.

Product mentions were coded as "paid placements" where it could be definitively established that a contract or endorsement deal existed between artist and brand (e.g. via <https://celebrityendorsers.com>), or

⁶ In deriving this total, for the sake of simplicity, only 'lead artists' (including multiple lead artists) were considered - 'featured artists' were ignored.

where the artist was known to own the brand in question (e.g. Jay-Z and Rocawear).

5 Results

Quantitative analyses and exploratory semantic analyses were performed with R (R Core Team 2019), and the `ppcor` package (Kim 2015); all figures were generated using `ggplot2` (Wickham 2016). In total, there were 2,833 total product mentions – a mean of 1.07 mentions per song. Considering only lyrics which mentioned at least one product, the mean was 3.16 per song.

There was a strong, positive, significant correlation between songs' year of release and number of product mentions, $r(24) = .95, p < .001$ (figure 1). Controlling for the percentage of songs per year featuring at least one rapped verse, which increased roughly linearly over time, the aforementioned correlation was weaker, but remained significant, $r(23) = .53, p = .006$.

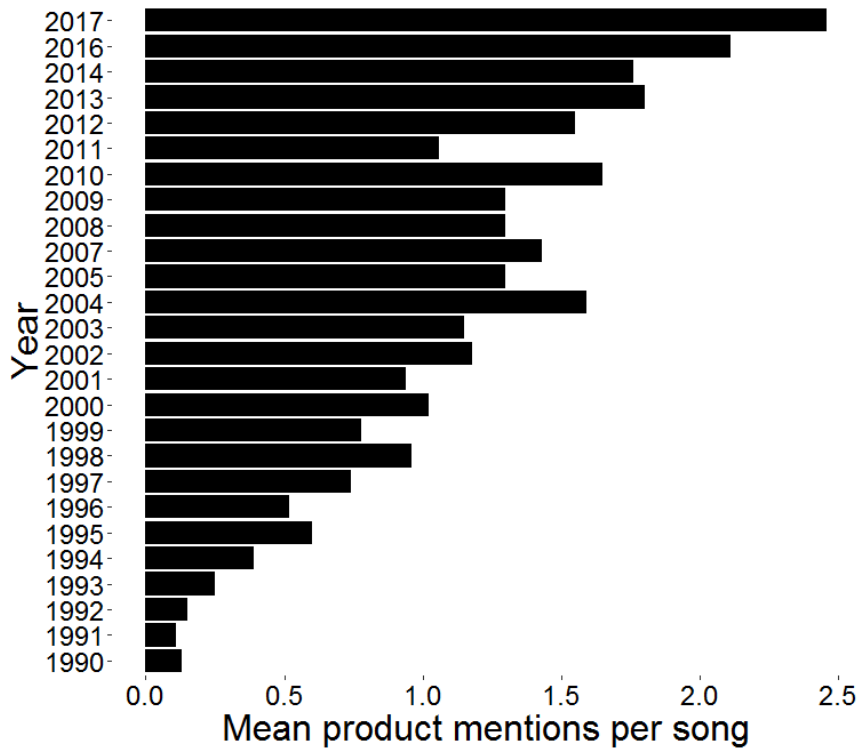


Figure 1: Bar plot depicting the number of product mentions for each release year studied (note that 2006 and 2015 are omitted due to a lack of data).

The types of products being mentioned remained very consistent over time. Cars, and more recently Fashion, were reliably the most-mentioned product categories – in fact, of the twenty-six years covered in the current study, Cars or Fashion were the most frequently mentioned categories in all but two (see table 1).

Considering the specific products being mentioned, a clear trend towards "luxury" products was evident. Of the ten most commonly mentioned brands, eight are renowned predominantly for their luxury products (e.g. Mercedes, Gucci, Rolls-Royce, see table 2).

Year	Category	Mentions	Percentage of (yearly) total mentions
2017	Cars	66	26.83
2016	Cars	62	29.25
2014	Fashion	54	30.68
2013	Fashion	55	30.56
2012	Fashion	57	36.77
2011	Cars	28	26.42
2010	Cars	45	27.27
2009	Fashion	37	28.46
2008	Cars	44	33.85
2007	Cars	63	44.06
2005	Cars	56	43.08
2004	Cars	64	40.25
2003	Fashion	42	37.50
2002	Cars	42	35.29
2001	Cars	34	36.17
2000	Cars	43	42.16
1999	Cars	29	37.18
1998	Cars	40	40.82
1997	Cars	24	32.43
1996	Cars	17	32.08
1995	Cars	19	31.67
1994	Alcohol	8	20.51
1993	Cars	7	28.00
1992	Food and drink	8	53.33
1991	Cars	5	45.45
1990	Cars	6	46.15

Table 1: Summary table illustrating the most commonly mentioned product category for each year studied.

The vast majority of product mentions (91.63%) were framed neutrally – i.e. the artist expressed no clear and obvious opinion about the product in question – while 6.64% were positive (figure 2). Only 1.34% of the lyrics studied could be verified as containing a paid product placement (e.g. where an ambassadorial relationship between brand and artist was public knowledge). Of this subset ($n = 38$), 72.73% were framed neutrally and 27.27% positively.

Brand	Product type	Mentions	Percentage of all mentions
Mercedes	Cars	188	6.64
Gucci	Fashion	76	2.68
Chevrolet	Cars	71	2.51
Rolls-Royce	Cars	71	2.51
Hennessy	Alcohol	69	2.44
Cadillac	Cars	65	2.29
Louis Vuitton	Fashion	61	2.15
Bentley	Cars	60	2.12
Rolex	Watches/ jewellery	58	2.05
Glock	Firearms	57	2.01

Table 2: Summary of product mentions by brand and product type, in descending order of frequency.

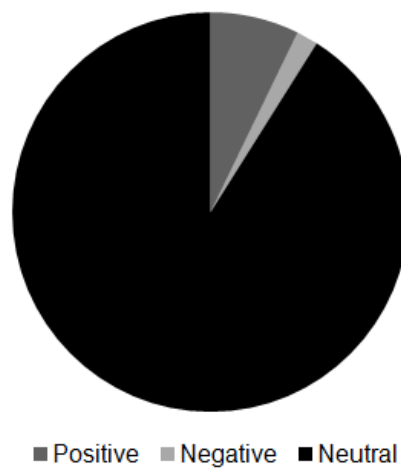


Figure 2: Pie chart illustrating the ways that product mentions were framed, by proportion.

The overall lyrical content of the songs that mentioned at least one product ($n = 1,694$) was compared to those that did not ($n = 952$). Firstly, type-token ratios (TTRs) – an indicator of lexical diversity, derived by dividing the total number of unique words by the total number of words overall – were calculated for the two sets of lyrics. It was found that, on average, songs containing product mentions had a greater proportion of unique words (figure 3).

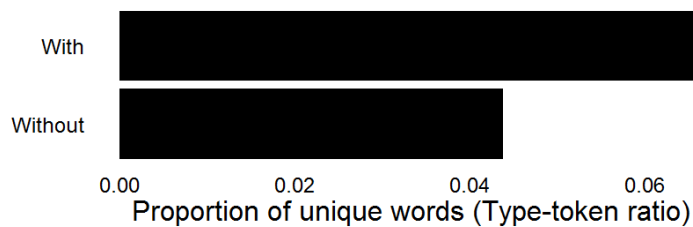


Figure 3: Bar plot depicting vocabulary diversity (proportion of unique words) in lyrics with product mentions and lyrics without.

The two sets of song lyrics were also examined in terms of their focus on the self, with the number of first-person pronouns – as a proportion of overall words used – measured as an approximation thereof. Overall, the subset of song lyrics that contained product mentions were slightly less self-focused (figure 4).

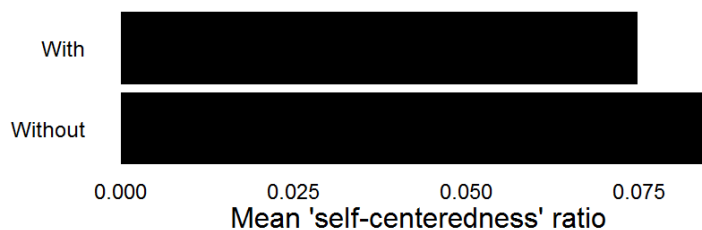


Figure 4: Bar plot depicting "self-centeredness" (proportion of personal pronouns) in lyrics with product mentions and lyrics without.

Lastly, the same approach was used to obtain an approximation of how money-focused the two subsets of lyrics were. This was achieved by calculating the frequency of a set of money-related words (adapted from Money Vocabulary Word Bank 2009) as a proportion of overall words. These words occurred approximately three times as often in the set of lyrics that mentioned products (figure 5).

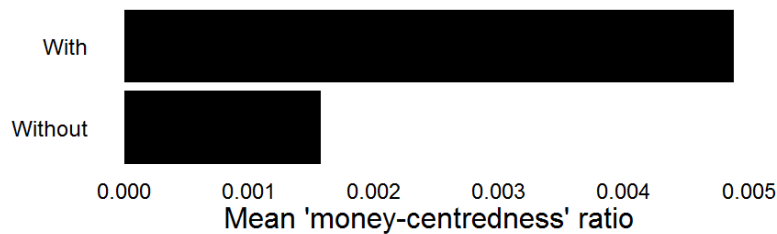


Figure 5: Bar plot depicting "money-centeredness" (proportion of money-related words) in lyrics with product mentions and lyrics without.

6 Discussion

Product mentions were highly prevalent in the lyrics studied, consistent with prior research (Craig, Flynn & Holody 2017). As hypothesized, product mentions increased drastically over time, even when adjusting for the accompanying increase in the frequency of rapped verses. That is, although hip hop lyrics tended to feature more product mentions than R&B lyrics, and the popularity of hip hop relative to R&B increased over time, there was an overall increase in the frequency of product mentions that could not be attributed to this alone. This finding mirrors the observation of de Gregorio & Sung (2009), whose research indicated that, up until 2002, the prevalence of product mentions had been increasing. The current study shows that this trend has continued in the fifteen years – in fact, by 2017 product mentions were roughly twice as common as in 2002. One could argue that this increase, at least in part, denotes the business model of using product mentions having received increased

attention by artists, producers or music companies. Although very few product mentions were identified as paid placements, artists and music companies might plausibly use mentions to more implicitly signal interest to relevant companies. With this said, however, the majority of mentions most likely arise due to close, existing relationships between hip hop and R&B culture and the products in question.

The types of products being mentioned generally remained quite constant, with small fluctuations year-on-year. Mentions of cars, fashion and (to a lesser extent) alcohol predominated. This is largely consistent with previous research (Craig & Bichard 2017; Mohammed-Baksh & Callison 2014). Craig & Bichard (2017) found that mentions of fashion brands were most common between 2009-2013, which is corroborated by the data reported here. However, considering the entire sample, cars emerged as the most popular overall category. By including lyrics from a much wider time-period than in previous research, the current study therefore provides a more comprehensive history of product mentions in hip hop lyrics, and avoids being a "snapshot" of any particular point in time.

In general, the relative stability of the main product categories indicates that, although specific cultural signifiers in hip hop and R&B music may have changed over time, the types of products used for this purpose have not. For example, fashion brands have remained integral to self-expression and establishment of cultural identity in hip hop and R&B, although the specific brands being mentioned reflect a transition away from the "streetwear" brands popular in the nineties, towards high fashion (Berlinger 2018). Alluding to this trend, rapper Questlove (2014) postulated succinctly that:

"Hip-hop is about having things to prove you're not a have-not"

Questlove argued however that the distinction between so-called "haves" and "have-nots" has shifted dramatically over hip hop's lifespan, leading artists to increasingly mention signifiers of luxury perceived as unattainable for most listeners.

As hypothesized, the majority of product mentions were framed neutrally. This supports Ferguson & Burkhalter's (2014) characterization of product mentions as cultural signifiers – describing, setting a scene, expressing identity or signaling sub-cultural belonging, as opposed to deliberately endorsing a product. Even where luxury brands are mentioned by name, there is a tendency to present them prosaically, as a part of everyday life. For example, in "Peso", ASAP Rocky (2011) raps:

"Raf Simons, Rick Owens, usually what I'm dressed in"

This lyric is typical in that, though it makes reference to high-status fashion designers, it is presented as a simple matter of fact, thereby juxtaposing notions of luxury and the everyday. Thus, even where the purpose of a product mention appears to be braggadocio, the framing thereof avoids being explicitly positive, relying instead on the listener's knowledge of the brands mentioned. This is an important difference, relative to some more traditional product placements, but also highlights that valence alone is insufficient to make conclusive inferences about a songwriter's intent. Even so, the few product mentions verified as "paid endorsements" did tend to be framed more positively, as predicted. Evidently, there exists at least some motivation to present paid-for placements in a more positive light.

Overall diversity of vocabulary was greater for songs mentioning products, as predicted. This finding is consistent with the notion of product names providing a heightened sense of realism, or helping to portray a scene in greater detail, though may have been confounded to an extent by the number of rapped verses. That is, songs featuring at least one rapped verse were more likely to mention products, and such songs tend to have larger vocabularies generally (Jewalikar & Verma 2015). Lyrics mentioning products also contained many more words pertaining to money, implying that at least some product mentions were intended as signifiers of socioeconomic status. Supporting this interpretation, there was a clear bias towards luxury products, in terms of the specific brands mentioned (e.g. sports car manufacturers, high-end fashion designers). This corroborates the broad characterization of hip hop

and R&B as aspirational (Smith 2003), and mainstream hip hop in particular as conveying a strongly capitalist ideology (Newman 2007). The role of product mentions in particular, within this context, is epitomized in the following interaction, from the documentary film "Something From Nothing: The Art of Rap" (Ice-T, Baybutt & Toogood 2012):

Ice-T: When I do "Six in the Morning" [...] if I had've said "fresh sneakers", it wasn't as dope, as saying "fresh Adidas".

DJ Premier: It made you go "yo, I gotta get me a new pair. For real, like you really had to get a new pair, 'cos he got 'em".

7 Limitation

A potential limitation of the current study is that all product mentions were identified via manual, human coding, as opposed to an automated method. This approach was chosen for two main reasons. Firstly, there are many thousands of potential products that could be mentioned, and therefore compiling an exhaustive search list would be unfeasible. Secondly, because of the myriad different (sometimes context-dependent) slang terms by which specific products may be identified, writing software to detect these would be a highly complex undertaking. For example, a previous study reported the use of fourteen different terms for Mercedes (Miszczynski & Tomaszewski 2014). Nonetheless, it must be acknowledged that some product mentions were potentially omitted because of unknown slang terms.

Additionally, it is difficult to tell with certainty whether product mentions constitute paid placements. In a limited number of cases, paid placements could be reasonably inferred on the basis that, for example, the company mentioned was owned by the artist, or the artist was known to be a brand ambassador. However, it is likely that some paid endorsements were not coded as such, because of an absence of concrete evidence of any relationship or deal between the two parties.

Lastly, the few semantic analyses carried out here took a rather broad-brush approach – simple keyword frequency counts are not con-

ductive to making confident assertions about specific songwriters' intentions when mentioning products. The analyses reported are therefore intended primarily as a starting point for further, more in-depth investigation, rather than an endpoint.

8 Conclusions

For much of hip hop and R&B's history, product mentions appear to have formed an integral part of its lyrical content. In recent years, their prevalence has increased dramatically. This trend seemed to begin in the mid-1990s, and has shown no sign of slowing down since. Generally speaking, there are a limited set of products mentioned, which reflect important aspects of hip hop and R&B culture. However, there is also a small degree to which the hierarchy of these fluctuates. These observations may reflect wider cultural shifts, and surely have increasing relevance as hip hop in particular become more and more integrated into the mainstream. There is likely no single motivation or set of motivations for mentioning products, although the notions of serving a descriptive purpose and providing cultural signifiers both receive support here. So too does the idea of braggadocio and/or signaling wealth or membership of a particular socioeconomic class. In general, lyrics mentioning products have both qualitative and quantifiable differences, in terms of their general topics and perspectives. That is, there appear to be some types of songs that are inherently more likely to feature product mentions, compared to others. To uncover songwriters' intentions in greater detail, however, a closer textual analysis (following, for example, Christensen et al. 2018 or North et al. 2018) is warranted. Nonetheless, the current study was successful in providing perhaps the most comprehensive overview to date of product mentions in hip hop lyrics – covering a greater number of songs and spanning a longer period of time than previous studies – hopefully providing a fruitful platform for further inquiry.

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Closing the gap: Understanding the perceptual differences between generations regarding music streaming technology

Dexter L. Purnell⁷

Abstract

In 2015, the recording industry saw its first measurable year-on-year growth in twenty years. Digital revenues contributed to this growth as they now account for 54 percent of the global recorded music market. However, the true driving force behind the industry's change in fortune was music streaming technology. Although music streaming has become the preferred method for recorded music consumption, there appears to be generational differences in the utilisation rate of the technology. The study used a modified version of the Technology Acceptance Model (TAM) to investigate the differences in behavioural intention regarding music streaming technology between digital natives and digital immigrants. Results showed statistically significant differences between digital natives and digital immigrants. Although the study revealed a difference between digital natives and digital immigrants, the differences were small. Both groups scored high on measures of the perceived usefulness and the perceived ease of use regarding music streaming technology thereby indicating that other factors may also contribute to the differences in utilisation rates.

Keywords: music streaming, digital native, digital immigrant, Millennials, Generation Z, recording industry, behavioural intention, Technology Acceptance Model (TAM)

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1 Introduction

Fuelled by advances in technology and evolving consumer preferences, turnover and profits in the global recording industry began their steady decline in 2005 (International Federation of the Phonographic Industry, 2019). This erosion of profits was created by a decline in the sales of physical and digital albums and tracks along with changing music consumption preferences. In the United States, during the period between the first quarter of 2017 and the fourth quarter of 2018, the sale of physical albums declined by 33.3 percent, digital albums by 25.3 percent and digital tracks by 27.7 percent (Recording Industry Association of America 2019). However, the global music market achieved a crucial milestone in 2015 as digital formats became the primary revenue stream for recorded music, overtaking sales of physical formats (IFPI 2016). Digital revenues rose 10.2 percent to US \$6.7 billion in 2015, helping to offset the falling sales of CDs and leading to the industry's first measurable year-on-year growth in twenty years. Music streaming technology was the driving force behind this growth.

2 Music streaming

The popularity of music streaming as the preferred method for music consumption has exploded since 2011. In 2018, music streaming helped the global recorded music market grow by 9.7 percent. This was the fourth consecutive year of global growth and the highest rate of growth since 1997 (IFPI 2019). It was also the first time since 1999 that U.S. music revenues grew materially for more than two years in a row. Digital revenues now account for 58.9 percent of the global recorded music market. Total streaming revenues grew by 34 percent and now account for 46.9 percent of the global recorded music industry's total revenue. Paid streaming revenues also increased by 32.9 percent. By the end of 2018, there were 255 million users of paid subscription accounts globally, with 79 million having been added during the year (IFPI 2019).

The U.S. recorded music industry is expected to surpass \$18 billion by 2020 with \$16 billion coming from streaming services and live music

(PricewaterhouseCoopers 2016). Although total digital download and physical unit sales declined by 26 percent and 33.3 percent respectively, streaming revenues grew by 30.1 percent to \$7.4 billion in 2018 (RIAA 2019). Digital content creators currently have considerably more access to information, technology and the distribution chain. Furthermore, barriers of entry into recording industry have been significantly reduced and thus new opportunities have been created (Renard et al. 2013). The first half of 2019 witnessed a six-month record of over 507 billion on-demand streams in the United States (Nielsen 2019). Singles and albums that span a wide array of genres, moods and even languages were the catalysts behind the impressive 2019 milestone. This milestone serves as an indicator of changing music consumption preferences. Leading the way, as the primary users of music streaming services, are Generation Z and Millennials (Fluent 2017; Nielsen 2017).

3 Digital natives

There have been varying definitions for Generation Z and Millennials. Furthermore, depending on what definitions are used to identify start and end birth years for each generational category, cross-over may occur between older Generation Z and younger Millennials. For the purposes of this article, definitions outlined by Cord et al. and Tapscott are used. Millennials, also referred to as Generation Y, are individuals born between 1980-1990 and the first generation of digital natives (Cord et al. 2015). The term digital native refers to a generational cohort of consumers based on their fixed product of early development - i.e., year of birth after 1980 - and therein assumed difference in comparison to older generations because of their assumed exposure, experience, and/or emersion with digital technology (Jones et al. 2010). Based on the preceding definition, members of Generation Z are also considered digital natives and are defined as individuals born between the mid-1990s to the early 2010s and aged from 9 to 24 years old as of 2019 (Tapscott 2009).

Unlike Generation Z and Millennials, the generations preceding them are considered digital immigrants. Digital immigrants are individuals born before 1980 who have learnt to use new technologies, but still maintain their connections to the pre-digital past (Prensky 2001). Therefore, the nature of technology usage and the acceptance of technology between digital natives and digital immigrants are presumably radically different (Gu et al. 2012). Digital natives have a distinctive set of abilities, preferences, and attitudes that set them apart from previous generations (Rideout et al. 2010). In 2018, younger Americans were found to be the 'power' users of music streaming services in the United States (Nielsen 2017). These findings support Gu et al.'s (2012) research by highlighting the differences that exist in relation to music streaming technology as digital natives stream music at a much higher rate than digital immigrants. It also appears to be their preferred method of music consumption. If presented with only one way to listen to music, 50 percent of individuals between the ages of 16 to 24 would choose audio streaming (IFPI 2018). Furthermore, a survey by Fluent, LLC (2017) found that 92 percent of Generation Z and 91 percent of Millennials used music streaming services compared to the lower 77 percent of individuals aged 35 years and older. Individuals aged 18 to 34 also use multiple streaming apps at a rate of 57 percent, while individuals 35 years and older use multiple streaming apps at a rate of 39 percent (Nielsen 2017). Therefore, it appears that age is one of the main factors affecting an individual's music consumption behaviour (Chamorro-Premuzic et al. 2010; ter Bogt et al. 2003).

4 Behavioural intention

A substantial amount of research indicates music consumption behaviour has a psychological basis. The theoretical framework guiding much of the research in this area is that music reflects and reinforces people's psychological, biological, and social needs (Rentfrow 2012; Chamorro-Premuzic et al. 2010; Laukka 2007; Tarrant et al. 2000). One of the theories used to assess the link between social norms and behavioural inten-

tion is the Theory of Reasoned Action (TRA). This theory proposes that behaviour is determined by the behavioural intention to engage in the behaviour (Ajzen & Fishbein 1980; Fishbein & Ajzen 1975). Another theory used to assess the motivational forces behind behaviour is The Theory Planned of Behaviour (TPB). It is based on the premise that behavioural intention is assumed to summarize the motivational forces influencing the enactment of behaviour, indicating how much effort people are willing to exert in the planning of behavioural enactment (Rise et al. 2003). Many models for measuring behavioural intention have been derived from TRA and TPB. The Technology Acceptance Model (TAM) is one such model. This alternative model performs well against TPB (Amoroso & Gardner 2004). TAM theorizes that an individual's behavioural intention to use technology is determined by two beliefs: perceived usefulness and perceived ease of use. It has become a well-established and robust model for predicting user acceptance (Amoroso & Gardner 2004).

A recent study by Lonsdale & North (2011) examined music consumption in relation to age. They discovered that people over 30 years-old regard music as less important when compared with adolescents. Although this research on musical attitudes and age highlights the fact that music is very important during adolescence, it is unclear whether it remains as important as individuals grow older. Furthermore, the current data on music streaming technology indicates a higher usage rate among adolescents (Fluent 2017; Nielsen 2017). A study by Cuadrado-García et al. (2019) used fuzzy-set qualitative comparative analysis to examine whether demographics (age and gender), music genres, devices used to listen to music (mobile vs. non-mobile), and perceptions about negative consequences of music downloading (digital piracy) can characterize the way individuals obtain recorded music (purchase versus downloading). The authors were unable to identify the patterns of individuals who actually purchased music. It is also possible that differences in meaning and social norms surrounding the language of music consumption have evolved between digital natives and digital immigrants. According to Wittgenstein (1967), there are large number of instances in which the word "meaning" can be defined thus: the meaning of a word

is its use in the language. When an individual speaks, what he or she means depends not only on what is said but also on the context (social norms) in which it is said (Richter 2019). The words, "listening to music", may invoke different meanings and methodologies for these two groups. Thus, if the recording industry wants to develop a thorough and complete understanding of how age affects music consumption behaviour, the differences in behavioural intention regarding music streaming technology between digital natives and digital immigrants should be investigated.

5 Method

The study used self-administered online surveys (appendix A) to collect primary research data on music listeners to examine the relationships between behavioural intention, digital native status and their music consumption behaviour. Participants were members of the Amazon Mechanical Turk (MTurk) human intelligence marketplace. Amazon launched the marketplace in 2005 for internal projects requiring human intelligence. It has since been made available to anyone with an Amazon account (Keith et al. 2017). Individuals utilising the platform include a combination of workers (individuals who complete human intelligence tasks or "HITs") and requestors (individuals who post the HITs). A convenience sample consisting of MTurk workers was used for three reasons: (1) the population was easily accessible; (2) survey costs could be kept reasonable and (3) data collection could be facilitated in a reasonable amount of time. There was a total of 687 responses collected from MTurk workers; however, only 415 were used in this study as the remaining 272 responses were removed from the dataset because the participants were not from the United States. Of the 415 respondents used, 41.4 percent were male, 57.8 percent were female, 0.7% identified as other and 47.2 percent were from the southern United States. The study participants ranged in age from 17 to 77 with a mean age of 36.4. The age variable was also used to classify respondents aged 17-37, which accounted for 60 percent of the sample, as digital natives. Partici-

pants aged 37 and older, which accounted for 40 percent of the sample, were classified as digital immigrants. A summary of the descriptive demographic statistics is presented in appendix B.

**Scales Derived for
Modified Technology
Acceptance Model
(TAM)**

Perceived Usefulness

- PU1 Using music streaming technology can enable me to listen to the music I want more quickly
- PU2 Using music streaming technology can improve my music listening experience
- PU3 Using music streaming technology can make it easier to listen to music
- PU4 Using music streaming technology can increase the amount of music I listen to
- PU5 Using music streaming technology can enhance my effectiveness in finding and listening to the music I want
- PU6 I find music streaming technology useful in listening to music

Perceived Ease of Use

- PE1 Learning to use music streaming technology is easy for me
- PE2 I find it easy to get what I need with music streaming technology
- PE3 My interaction with music streaming technology is clear and understandable
- PE4 I find music streaming technology to be flexible to interact with
- PE5 It is easy for me to become skilful at using music streaming technology
- PE6 I find music streaming technology easy to use

Figure 1: Modified Technology Acceptance Model (TAM)

A modified version of the Technology Acceptance Model (TAM), as shown in figure 1, was used to create the research instrument for the study. TAM is an adaptation of the Theory of Reasoned Action developed by Fishbein & Ajzen (Amoroso & Gardner 2004). TAM is tailored explicitly for modelling user acceptance of technology systems and provides a basis for tracing the impact of external factors on internal beliefs, attitudes, and intentions (Amoroso & Gardner 2004). It is comprised of twelve items and two constructs: perceived usefulness and perceived ease of use. All items were rated on a five-point Likert-type scale (1 = Strongly disagree, 5 = Strongly agree). Internal consistency and reliability testing returned a favourable Cronbach's alpha of .94 for perceived usefulness and .93 for perceived ease of use.

6 Analysis and results

The study sought to answer the following research question: "What are the differences in behavioural intention towards music streaming technology between digital natives and digital immigrants?" The question generated two hypotheses:

H1(a): Digital natives find music streaming technology more useful than immigrants.

H1(b): Digital natives find music streaming technology easier to use than immigrants.

Independent t-tests were used to compare the differences between digital natives and digital immigrants in their perceived usefulness and perceived ease of use of music streaming technology. Perceived usefulness and perceived ease of use scores were calculated by averaging participant's responses on the items for each construct.

There was a statistically significant difference in the perceived usefulness scores for digital natives ($M= 4.31$, $SD= .66$) and digital immigrants ($M= 4.07$, $SD= .76$); $t(413) = 0.24$, $p < .05$ (see figure 2). This indicated digital natives found music streaming technology to be more useful than did digital immigrants.

Age: Binned	Usefulness
Digital natives	4.3098
Digital immigrants	4.0730
SD	.76
F	1.379
t	0.241
df	413
p-value	0.001
Remark	Significant

Figure 2: Results for Perceived Usefulness of music streaming technology

Age: Binned	Ease of use
Digital natives	4.3132
Digital immigrants	4.0011
SD	.81
F	1.839
t	4.407
df	412
p-value	0.000
Remark	Significant

Figure 3: Results for Perceived Ease of Use of music streaming technology

Digital natives also had statistically significantly higher perceived ease of use scores ($M = 4.31$, $SD = .63$) regarding music streaming technology compared to digital immigrants ($M = 4.00$, $SD = .81$), $t(412) = 4.41$, $p < .05$ (see figure 3). This indicates that compared to digital immigrants,

digital natives found music streaming technology easier to use. Although there was a difference between digital natives and digital immigrants, the differences were small as both groups scored high on perceived usefulness and perceived ease of use. Furthermore, the null hypotheses were rejected based on the results of the test.

In terms of participants' level of perceived usefulness, participants found music streaming technology relatively useful; the mean score on perceived usefulness items was 4.22, with a standard deviation of .71 (on the scale of 1 to 5). Similarly, the data suggested that participants believe music streaming technology is easy to use. The mean score on perceived ease of use items was 4.19 with the standard deviation of .72 (on the scale of 1 to 5). The results of the study indicated there are differences between digital natives and digital immigrants surrounding their attitudes towards music consumption. It appears that their attitudes do set them apart from previous generations (Rideout et al. 2010). Digital natives had more favourable attitudes towards digital downloading and music streaming technology regarding both usefulness and ease of use when compared to digital immigrants. Miquel-Romero and Montoro-Pons (2017) found that age affects both listening frequency and device choice. Music listening frequency declines as individuals age which could be associated with the increasing opportunity cost of time. However, younger listeners listen more frequently and on digital download and music streaming compatible devices such as MP3 players, smartphones and computers. Therefore, the differences in perception relating to the ease of use and usefulness may be attributed to the fact that older individuals listen less frequently and are more likely to use traditional media to listen to music, which further support the study by Gu et al. (2012). The nature of technology usage and the acceptance of technology differs between digital natives and digital immigrants. Furthermore, these differences may be attributed to their exposure to, experience of, and/or emersion in digital technology (Jones et al. 2010). However, the similarities in digital native and digital immigrant usefulness and ease of use scores on measures of perception regarding music streaming technology indicate that other factors such as gender, loca-

tion or socio-economic status may likely contribute to the differences in use rates.

Music, typically, is more important in the lives of adolescents (Sik-kema 2005; ter Bogt et al. 2003). It is possible that older individuals use music streaming technology at lower rate due to the changes that occur as one moves through the life cycle. Increasing age may also be associated with a decline in the appreciation of music, which may result in greater distraction experienced by older individuals in the presence of background music (Chamorro-Premuzic et al. 2010). If this is the case, older individuals may avoid the use of music streaming technology to eliminate potential concentration issues as they navigate through daily activities. This is in direct contrast to younger individuals, especially Millennials, who are engaged with digital services during all waking hours of the day and keep their devices close at hand, and turned on, when they sleep (Nielsen 2017).

7 Discussion and conclusion

The study was only conducted to examine what, if any, differences exist in perceptions between generations regarding music streaming technology. It did not seek to answer why these differences may exist or examine other potential causes of differences in perception regarding music streaming technology. Furthermore, the use of convenience sampling in addition to paid, self-reporting respondents increased the potential for response bias in the study. The study was also limited by the fact that samples were chosen only from the population of the United States. Finally, there is a possibility that the study suffers from selection bias as well since the sample was drawn from a population of individuals possessing digital technology skills. Therefore, the findings of the study may not be capable of general application to certain populations in the United States or those of other countries. There may also be other generalisability issues within the population as 47.2 percent of the respondents in the survey were from the South region of the United States. Nonetheless, the data collected was valuable.

These limitations notwithstanding, the present study: (1) contributes to the overall body of knowledge on music consumption behaviour; (2) adds to the body of research on digital natives and behavioural intention; and (3) supports the evolving music consumption trends reported by music and entertainment industry organizations such as the IFPI, RIAA, and Nielsen. Overall, the available literature indicates that age has a noticeable impact on music consumption behaviour. This study adds to that literature by revealing the generational differences in perception regarding music streaming technology that currently exist.

In closing, future studies could add value to this topic by seeking to better understand why age affects music consumption behaviour and the use of music streaming technology. The results of the study also provide insight into future research directions that may be beneficial to the recording industry. Additional topics for future research include: (1) the effect of recording artist catalogue availability on music streaming technology use; (2) the effect of feature, advantage and benefit awareness on music streaming technology use and (3) the effects of gender, socioeconomic status and location on music streaming technology use. As music consumption moves from a model of ownership to access, the recording industry must seek to understand how to serve the needs of older music fans. This is important because older individuals often have larger amounts of disposable income and could therefore prove to be profitable to the industry.

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9 Appendix

9.1 Appendix A: Survey instrument

This questionnaire is intended to collect data about music consumption (listening) behavior and technology usage. The questionnaire provides information that will assist in the study. Your answers will be treated as completely confidential by the researcher and will only be released as part of a statistical analysis.

Digital downloading examples- iTunes, Amazon MP3, Google Play, CD Baby, etc.

Streaming examples- Apple Music, Tidal, Pandora, Spotify, YouTube, Google Play Music, etc.

1. I use the Internet every day

Strongly disagree Disagree Neither agree or disagree Agree Strongly agree

2. I use computers for many things in my daily life

Strongly disagree Disagree Neither agree or disagree Agree Strongly agree

3. When I need to know something, I search the Internet first

Strongly disagree Disagree Neither agree or disagree Agree Strongly agree

4. I use the computer for leisure every day

Strongly disagree Disagree Neither agree or disagree Agree Strongly agree

5. I keep in contact with my friends through the computer every day

Strongly disagree Disagree Neither agree or disagree Agree Strongly agree

6. I am able to surf the Internet and perform another activity comfortably

Strongly disagree Disagree Neither agree or disagree Agree Strongly agree

7. I can check email and chat online at the same time

Strongly disagree Disagree Neither agree or disagree Agree Strongly agree

8. When using the Internet for my work, I am able to listen to music as well

Strongly disagree Disagree Neither agree or disagree Agree Strongly agree

9. I am able to communicate with my friends and do my work at the same time

Strongly disagree Disagree Neither agree or disagree Agree Strongly agree

10. I am able to use more than one application on the computer at the same time

Strongly disagree Disagree Neither agree or disagree Agree Strongly agree

11. I can chat on the phone with a friend and message another at the same time

Strongly disagree Disagree Neither agree or disagree Agree Strongly agree

12. I use pictures more than words when I wish to explain something

Strongly disagree Disagree Neither agree or disagree Agree Strongly agree

13. I use a lot of graphics and icons when I send messages

Strongly disagree Disagree Neither agree or disagree Agree Strongly agree

14. I prefer to receive messages with graphics and icons

Strongly disagree Disagree Neither agree or disagree Agree Strongly agree

15. I use pictures to express my feelings better

Strongly disagree Disagree Neither agree or disagree Agree Strongly agree

16. I use smiley faces (emojis) a lot in my messages

Strongly disagree Disagree Neither agree or disagree Agree Strongly agree

17. I expect quick access to information when I need it

Strongly disagree Disagree Neither agree or disagree Agree Strongly agree

18. When I send out an email, I expect a quick reply

Strongly disagree Disagree Neither agree or disagree Agree Strongly agree

19. I expect the websites that I visit regularly to be constantly updated

Strongly disagree Disagree Neither agree or disagree Agree Strongly agree

20. When I study, I prefer to learn those things that I can use quickly first

Strongly disagree Disagree Neither agree or disagree Agree Strongly agree

21. Using digital downloading/streaming can enable me to listen to the music I want more quickly

Strongly disagree Disagree Neither agree or disagree Agree Strongly agree

22. Using digital downloading/streaming can improve my music listening experience

Strongly disagree Disagree Neither agree or disagree Agree Strongly agree

23. Using digital downloading/streaming can make it easier to listen to music

Strongly disagree Disagree Neither agree or disagree Agree Strongly agree

24. Using digital downloading/streaming can increase the amount of music I listen to

Strongly disagree Disagree Neither agree or disagree Agree Strongly agree

25. Using digital downloading/streaming can enhance my effectiveness in finding and listening to the music I want

Strongly disagree Disagree Neither agree or disagree Agree Strongly agree

26. I find digital downloading/streaming useful in listening to music

Strongly disagree Disagree Neither agree or disagree Agree Strongly agree

27. Learning to use digital downloading/streaming is easy for me

Strongly disagree Disagree Neither agree or disagree Agree Strongly agree

28. I find it easy to get what I need with digital downloading/streaming

Strongly disagree Disagree Neither agree or disagree Agree Strongly agree

29. My interaction with digital downloading/streaming is clear and understandable

Strongly disagree Disagree Neither agree or disagree Agree Strongly agree

30. I find digital downloading/streaming to be flexible to interact with

Strongly disagree Disagree Neither agree or disagree Agree Strongly agree

31. It is easy for me to become skilful at using digital downloading/streaming

Strongly disagree Disagree Neither agree or disagree Agree Strongly agree

32. I find digital downloading/streaming easy to use

Strongly disagree Disagree Neither agree or disagree Agree Strongly agree

33. Number of years using music downloading services:

34. Number of years using music streaming services:

35. Annual (yearly) amount spent on digital music downloads:

36. Annual (yearly) amount spent on music streaming services:

37. Age:

38. Gender

9.2 Appendix B: Descriptive statistics

Demographics of survey participants

Variable	<i>n</i>	Percentage	Mean
Male	172	41.4	N/A
Female	240	57.8	N/A
Other	3	0.7	N/A
Northeast Region	70	16.9	N/A
Midwest Region	78	18.8	N/A
South Region	196	47.2	N/A
Midwest Region	71	17.1	N/A
Age	N/A	N/A	36.4
17 – 37	249	60.0	N/A
38 – 77	166	40.0	N/A
Less than \$1.00 annual spend on music streaming services	190	45.8	N/A
Less than \$1.00 annual spend on digital downloads	134	32.3	N/A
Number of years using music streaming services	N/A	N/A	7.0
Number of years using digital download services	N/A	N/A	8.9

WHERE THE MAGIC PEOPLE GATHERED: The Role of Private Members Clubs in the Contemporary Music Economy⁸

Sam Edrisi⁹

Abstract

In recent years, a new format of private member club has become increasingly popular. These clubs are aimed at a crowd which identifies with entrepreneurialism, independence, and creativity. This article explores one such club, Soho House, at the heart of the contemporary music economy. Soho House has successfully inscribed itself as a primary meeting point, where recording artists, managers, label owners and major record label employees frequently socialise with other members of the creative industries. This article explores the role of Soho House in the music economy. Through interviews with members and an overview of relevant theoretical literature, this paper analyses how the club is used to facilitate communication and knowledge transfer between CI workers, how a common language and behaviour is shared, and how the private member club model ultimately supports the sociality of the music industry. This study concludes that Soho House plays a vital role the contemporary music economy by encouraging social interaction between industry professionals; by connecting the music industry with other CI subsectors; and by promoting a common language and tacit codes between anchoring points within the global creative economy

Keywords: Private clubs, London, cultural workers, cultural labour, Soho House, creative industries

1 Introduction

The music industry is a subsector of the creative industries (CI) that thrives on the inherently interdisciplinary, collaborative, and multi-faceted nature of the creative economy. Over the past few years, the CIs

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have benefited from a rise in alternative physical spaces in which members of the music industry and others coexist (see Brown 2017). To drive production of cultural artefacts, these alternative spaces expand their professional and personal networks, adopt a lifestyle assumed by CI activity, and express allegiance to the CI community.

Such alternative spaces recently received increased attention in CI literature and the news media. In a 2017 BBC News article, Jennifer Ceaser addressed the emerging trend of a new format of private member clubs (PMCs hereafter), exemplified in this article by Soho House. Ceaser proclaimed, *"Welcome to the new breed of private members' club, which claim to be less restrictive and more diverse than the stuffy gentlemen's clubs of the past"* (Ceaser 2017). These clubs are targeted at a demographic that identifies less with old money and elitist lifestyles – characteristics that are associated with the traditional gentlemen's club – and more with entrepreneurialism, cosmopolitanism, and an allegedly inclusive mindset.

Given these PMCs are relatively new, having only gained prominence in the last twenty years, the true impact of private member clubs on the music industry, and by extension the CIs as a whole, remains difficult to establish. However, their significance must not be understated. These new environments have come to play a sizeable role in the daily lives of an ever-increasing number of CI professionals and have successfully accommodated the increasingly collaborative and interdisciplinary nature of the creative industries. As financial investment in these spaces reaches new heights, this raises the question as to what role they play in the lives of music industry professionals and what this may signify for the music industry—and the wider creative economy as a consequence.

Soho House is deeply embedded within the music industry in certain key locations, such as Los Angeles, London, and New York City. Aimed at the 'in-crowd', over the years Soho House has become an essential meeting place for members of the music industry, including performers, record producers, artist managers, and executives. An analysis of its internal activities may therefore shed a light on how its members make use of PMCs to benefit their industry as the creative economy evolves.

This paper aims to uncover and analyse the role of private member clubs in the lives of music industry professionals. This paper draws from interviews conducted primarily with club members at Shoreditch House, the East London branch of Soho House, all of whom are deeply embedded within the music industry, either directly or by virtue of their respective interdisciplinary subsectors. Using Shoreditch House as an initial case study, this paper first presents the PMC as a space where music industry professionals co-locate with other CI workers to shape a unique lifestyle and perform a common habitus. Subsequently, the PMC is considered as a node, first within a global network of PMCs and then within the global music industry ecosystem. This study explores the identities of its members, how they build a personal and networked identity, and how alternative spaces where professional and personal lives collide influence the networked and connected natures of the global music economy. Finally, tentative limitations to the PMC model will be discussed.

Prior to the findings and discussion, the theoretical review will begin with a brief historical background on the cultural contexts in which the Soho House model was born. Then a brief theoretical review on creative labour and lifestyles will follow. The role of networks and spaces in the contemporary music economy is reviewed, which highlights the importance of co-location of CI professionals in an increasingly globalised economy.

2 Brief historical contexts of London's club culture and Soho House

Soho House finds much of its roots in the night club culture and music scene of the 1980s and 1990s, during which A-list members of the music, fine art, and film industries socialised in small groups. Private clubs such as Groucho's, The Hospital Club, and Black's, among others, were deeply rooted within the cultural zeitgeist of the time. Its crowds were exclusive, elite, and few in number. PMCs were a safe place for London's most influential artists to form tightknit bonds, where opportunities for col-

laboration would arise, uninterrupted by the prying eye of the media. At first, Soho House appeared as a direct competitor to neighbouring clubs. It quickly embedded itself into London's cultural footprint, which had been revitalised in the late 1990s and early 2000s through the 'Cool Britannia' period (Sunley, Pinch & Reimer 2011), Brit-pop, and Brit-art (While 2003).

Over the past decade, Soho House evolved into a more corporate format. Its subsequent global expansion efforts demonstrate an acknowledgement that its corporate identity soon relied on the ever-growing, ever-changing face of the creative economy. Ellis-Petersen (2016) quoted social commentator Peter York as saying that high demand for memberships and aggressive worldwide expansion (Addley 2012) have seen the club concede its exclusivity to meet the growing market of creative workers. Where once it was considered the privilege of an elite, cultural cohort, now it appears "*there's nothing special about it anymore*", and it no longer serves as a location for "*where the magic people ... go anymore*" (ibid.). Through the term 'magic people', Ellis-Petersen referred to the cultural icons and noteworthy industry insiders of the music industry, film and television, and other media subsectors, many of whom were invited as founding members to raise the club's profile.

The club has now become a prime location for spotting a newer, albeit arguably more attenuated, breed of 'magic people'. A more mobile and digital workforce meant a rise in demand for new environments where non-traditional, professional activities could be exercised. Co-working spaces (see Brown 2017) and alternative environments bridging the personal with the professional attracted a lifestyle-oriented creative industries workforce that had changed face overnight. Thus, Soho House inscribed itself into a global vision as the home of the stereotypical, *new creative*: one that is increasingly self-mediating and self-policing; one defined by its distinct habitus, common codes, a rejection of white-collar corporatism, and an affinity for authenticity, aesthetics, and urban pastoralism (see Harris 2012).

In 2007, the group made its ode to East London when it opened Shoreditch House. This space is grounded in what once served as the centre stage for cultural production from the early 1980s to the 1990s (Harris 2012). Harris' seminal research testifies to a district that was once the core of a creative revolution thanks to cultural icons, such as Jonny Woo, who shaped its cultural identity (Cochrane 2014). Relying on the countercultural image of the area (Saner 2004), Shoreditch House found a home in a large warehouse a few streets away from Curtain Road, East London's music artery. Shoreditch House is itself a pastiche of an East London far gone, once home to "*non-mainstream forms of cultural life*" (Hoare 1994).

3 Literature review

3.1 Overview of Cultural Labour and Lifestyles

3.1.1 Cultural Labour

To understand the labour conditions of music industry professionals, theories on cultural labour provide relevant perspectives. Contemporary debates on the cultural worker cover theories surrounding cultural labour (McRobbie 2002; McRobbie 2016; Pratt 2008), lifestyle (McRobbie 2013; Martins 2015; Bontje & Musterd 2009; Florida 2002; Florida 2014), and social organisation and interaction (see Florida 2002; Vivant 2013; Neff 2005; Flew 2013) along with extensive evaluations of labour conditions in the creative economy (McRobbie 1998; McRobbie 2002; McRobbie 2013; Flew 2013; Pratt 2000; Pratt 2008; Hesmondhalgh 2019; Hesmondhalgh & Baker 2011; Zukin 1998).

The labour conditions of CI workers have drifted from the conventions that governed much of the 20th century in traditional white-collar industries (Pratt 2000). Since the turn of the century, the UK's creative industries have surged, in part through major domestic policy efforts and the creation of the Department for Digital, Culture, Media and Sport (DCMS) (McRobbie 2016).

The number of creative workers grew and its associated lifestyles and dispositions along with it. Today the sector sees high rates of self-employment, project-based work (McRobbie 2002), and increased 'self-exploitation' (Zukin 1998) both in corporate environments and in the gig-economy. These traits are equally relevant across the music industry, along with unconventionally long work schedules and below average wages (Hesmondhalgh & Baker 2010). Neff, Wissinger & Zukin (2005: 308) equally note a "problematic normalisation of risk under flexible labour conditions". McRobbie (2016) notes that the personal and professional lives of contemporary cultural workers increasingly blur (see Pratt 2000; Wittel 2001) as socialisation after working hours, parties, social events, joining cultural events, and networking form a vital part of career development. Hesmondhalgh & Baker (2010: 14) similarly posited that this type of socialisation is considered a "*compulsory element of a job*" in music to remain in the loop in the music scene¹⁰.

CI workers are subjected to a mode of labour market mediation carried out intrinsically through social networks (Benner 2002), an attribution to a freelance economy highly reliant on project-based work often obtained through extensive networking practices (Neff, Wissinger & Zukin 2005). Castells (2000) equally observes a shift in organisational structures from hierarchical standards to a more network-intensive structure that prioritises interrelationships. Increased reliance on networking is said to contribute to the labour insecurities that pervade much of the modern working conditions of the CI worker, particularly where labour market inequalities arise from restrictions from localised specialist circles (Neff, Wissinger and Zukin 2005). Additionally, CI workers experience the added stress of the need to self-promote, self-mediate, and generate a personal brand to transmit a reputation within local networks (see Gill & Pratt 2008; Leadbeater & Oakley 1999).

¹⁰ This follows the concept of the "music scene" which Florida & Jackson (2010: 311) define as "geographic locations that bring together musical and business talent (e.g., agents, managers, taste-makers, gate-keepers, critics, and sophisticated consumers) across social networks and physical space (neighborhoods, communities, clubs, music stores, recording studios, and venues)".

CI workers are associated with the *Creative Class* (Florida 2002; Florida 2014) concept, which blends labour market theory and concomitant lifestyle dispositions through the emphasis of tacit codes and social values. In addition to basic countercultural lifestyle traits, reconfigured class relations are arguably defined by a uniquely entrepreneurial focus and an affinity for meritocracy with increased social mobility. These creatives are uniquely placed to transcend the traditionally observed restrictions of ethnicity, gender, or sexual orientation thanks to a higher level of education, an alleged rejection of conservative social views, and prominent individualist values. As such, the creative class is a class where social ordering and self-determined hierarchies operate within closed networks. Framed in a neoliberal perspective of contemporary labour market trends (Mould 2018), the creative economy sees reconfigured definitions of creativity, which befit the stretched and vague terminologies attributed to a "*widely cast net*" of the labour market (Flew 2013: 4). Bilton (2010: 2) equally notes that this new "*creativity*" has emerged as a "*buzzword in business*" in the effort to "*adapt to unpredictability, individualism and discontinuous change in the business environment*". This interplay between creativity and enterprise is most apparent where this convergence facilitates the increasingly internationalised role of the creative sector in the global economy (Bilton 2010; Caves 2002; Howkins 2013) in which artists are increasingly pressured to adopt an entrepreneurial mindset (Florida 2014).

3.1.2 Habitus and lifestyles

The creative economy has led to a systemic integration of work and leisure (McRobbie 2016). As such, personal identities play a significant role in cultural labour analysis. Industries highly reliant on cultural and symbolic output are perceived to self-legitimise by borrowing from counter-culture movements through an appropriation of clothing, lifestyle choices, and 'cool' attitudes (Bilton 2010; Neff 2005; McRobbie 2016; Florida 2002). This is visible, for instance, in how so-called 'hipster' culture (see Hill 2015) manifests as a perceived appropriation of counter-cultural lifestyle choices. The consumption of these cultural symbols and lifestyle

choices in neoliberal contexts accompany an increasingly individualised lifestyle that is socially *dis-embedded* from nearby communities and energised by an entrepreneurial impetus through a wilful capitalisation on (sub)cultural output (Mould 2018).

CI workers are frequently lumped into one—tribal¹¹—affinity group, mutually bound by lifestyle choices, cultural tastes, tacit codes, and common values. Such affinity groups place high value on a free-thinking mindset, an intrinsic spirit of tolerance (Florida 2002), and an openness to diversity (Jacobs 1961). They express these values by co-locating and socialising in 'cool' spaces (Vivant 2013). Firms create an image of authenticity (Lloyd 2006) by locating historically significant buildings (Hutton 2006). In his case study of Hoxton, Harris (2012) argues that 'properly creative' individuals are to thank for the area's recent revival, as they were at the origin of Hoxton's social and cultural identities. Local communities were gradually replaced by external newcomers who invested in the success of the creative buzz and symbolic capital these artists generated (see Neff 2005: 139). Local lifestyle connotations were quickly assimilated as the area was regenerated with a 'shabby-chic' aesthetic.

Zukin's (1982) focus on SoHo in New York City demonstrated that as warehouse spaces were connoted with artists' loft-living lifestyles, companies increased investments in office space in industrial neighbourhoods. Zukin associates these appropriations with the promotion of the habitus of the artist, where CI workers occupy warehouses as artists would living lofts. These symbolically rich "*knowledge-value*" spaces (Kotkin & Devol 2001: 21) benefit from interiors of dated labour conditions as a backdrop for a more "*vibrant, stylish*", and cosmopolitan "*alternative*" (Hannigan 2003: 354).

In Shoreditch, CI workers gravitate toward unique sites rich in symbolic capital where local dispositions can be assimilated, and shared values are clearly articulated. This assimilation results in the reclamation of urban spaces by a consumer class, leading to an idealisation of local heritage spaces for consumption (Pine & Gilmore 1998). Location-specific symbolic capital is used to drive individual identities, in which

¹¹ See Maffesoli (1996: 139)

this 'creativity' has come to denote an aspirational state of mind referring to a cosmopolitanism where inclusiveness and diversity are inherent (Pratt & Hutton 2013) and implied by design; in other words, a lifestyle trait dissociated from its more fundamental inference of cultural production (Mould 2018).

3.1.3 Networks & collaboration

Networks are crucial for artists to put the aforementioned entrepreneurial skills to use in environments that expose them to a variety of sources of value creation. Engelmann, Grünewald & Heinrich (2012: 32) note that multi-skilling, an ability to incorporate professional structures, and "*investing in different kinds of capital in different networks*" are instrumental to developing opportunities within the industry. They further corroborate that developing relationships within networks form a vital part in adapting to the enterprise of music business practice and provides a springboard for producers whereupon cultural and social capital (see Bourdieu 1984) can be shared and, crucially, exchanged (ibid.).

The importance of developing networks of collaboration and knowledge exchange between members of the music industry has been firmly established both in terms of digital connectivity, as well as face-to-face interactions within cultural environments in metropolitan areas, where physical spaces are significant enablers for artists to develop networks with a diversity of CI workers (Engelmann, Grünewald & Heinrich 2012). An increasingly entrepreneurial focus on creativity and cultural production buoys this, as artists are increasingly pressured to inscribe themselves within business-oriented environments¹² to propel themselves in their respective industries (Hesmondhalgh 2019) and extend their creative networks well beyond purely music industry contexts.

¹² Reflecting structural observations by Bilton (2010) and Florida (2002).

3.1.4 Place

'Place' has recently regained importance in cultural labour analysis as new spaces have evolved to accommodate new lifestyles in the digital age. CI workers foster personal and professional networks in clustered spaces (Landry & Bianchini 1995). It has long been established that clustering (or co-location) brings with it significant benefits (see Lorenzen & Frederiksen 2008). As such, co-location provides further economic benefits to the music industry and other creative subsectors thanks to close proximity in economic contexts defined by volatile market demand (Caves 2002 via Florida & Jackson 2010).

Frequent face-to-face communication (Karlsson 2008) and porous networks through embedded interactions (Granovetter 1985) are key benefits to overall creative sector activity, as 'face-to-face interaction in shared physical space' (Goffman 1963, via Grabher et al. 2018: 246) promotes frequent knowledge spill-overs (Karlsson 2008) between subsectors.

Project-based workers feel pressured to consistently and actively network to remain socially embedded (Vivant 2013: 60). Artists at the beginning of their careers recognise the importance of collaboration, networking with cultural intermediaries and other producers to get a foot in the door, and capturing the crucial attention of endorsers in the music industry (Musgrave 2017). Within these specialist fields (see Bourdieu 1984), face-to-face interaction consolidates relationships and encourages opportunities by 'being there' (Gertler 1995). Here, freelance CI workers can exchange contacts and ideas, and keep up with industry gossip (Oakley & O'Connor 2015: 201). This spill-over impacts a wide variety of subsectors. Watson (2008) specifically points to the music clusters of Soho and Shoreditch, where agents can navigate codified language, share social contexts, and develop trust.

Co-location and embeddedness are tightly interwoven (Gertler 1995). Shared knowledge, values, and memories (Scott 2010: 123) are articulated by the individuals who inhabit co-located spaces (Clare 2013). Here, habitus (Bourdieu 1977), local practices, tacit knowledge (Polanyi 1958), and cultural values are informally transmitted between

agents, facilitating social identification and ordering. Karlsson (2004: 98) notes a link between tacit knowledge and knowledge spill-overs, as tacit knowledge is difficult to transmit if proximity among peers is not assured. Frictionless transmission of codes is vital where "*personal knowledge of each other [is] based on a past history of successful collaboration or informal interaction.*" (Gertler 2003: 84). Therefore, it is crucial to be effectively inserted into the local 'buzz' and 'noise' (Grabher 2002) through intended and unanticipated encounters for local knowledge to be transmitted (see Clare 2013: 53). The presence of such co-located networks specific to CI subsectors is furthermore an acknowledgement of a will to foster comprehensive networking frameworks in a music economy that thrives on collaboration between various aspects of the market (Winter 2012), but which is simultaneously difficult to penetrate and has a track record of being closed to new entrants (ibid.).

3.1.5 Third spaces

Third spaces¹³ provide a backdrop in which common codes can be explored and performed. Nightclubs (Kotkin 2002), coffee shops, social clubs, and co-working spaces have become environments in which local professional ties are developed (Merkel 2017). These spaces have gradually replaced offices as the new hotbed of cultural production (Neff 2005), permitted in part through the mediation of social cohesion through informal gatherings. As Merkel (2017: 124) further confirms, they provide an environment that permits "*the free exchange of ideas, while enabling support networks and promoting the negotiation of shared spaces, resources and values*". Once effective, unplanned interactions are critical to the development of trust between agents (Turok 2003; Schüßler, Grabher & Müller-Seitz 2015). Watson further confirms that music professionals migrate networking activity to informal environments outside offices to cement this trust, where formal settings would prove otherwise problematic when opportunities for collabora-

¹³ See Oldenburg 1997

tion between independents and firms are being developed (Watson 2008).

Effective random encounters result from a curation and mediation process undertaken by managers of dedicated private spaces (Merkel *ibid.*). A reassessment of the term 'Third Space' has taken place, to denote these curated co-working environments as new third spaces that combine the informality of socialisation with the formality of work. The prevalence of such curated network spaces appears in part as a by-product of a symbiotic relationship between being a creative and simultaneously adopting principles of enterprise and self-determination, as common codes and tacit rules distinct to CI enterprise are universally available and homogenised within these environments. Exclusive, curated environments like PMCs provide the added benefit of significant symbolic capital, as these have "*reputational effects*" on its membership (Brown 2017: 115). Therefore, they are particularly crucial for singling out music industry professionals, in a field where barriers to entry as regards creative production and developing a social network have been dramatically lowered—and famously 'democratised'—thanks to technological advancements and the ubiquity of social networking platforms (Musgrave 2017).

3.2 Local buzz and global pipelines

Creative networks have been underpinned by a dual development of local cluster development in major global cities, as well as highly enriched international networks (see Maguire & Matthews 2014)—a trend reflected in the music industry (see Florida & Jackson 2010). This is generally denoted as the duality between local buzz and global pipelines (Bathelt, Malmberg & Maskell, 2004). Major metropolitan areas such as London, Los Angeles, New York City, and Berlin have benefited from strengthened ties. Global cities— 'local anchoring points' —in which these nodes are most apparent, refer to specific districts within major metropolitan areas where networked activity is more common (Castells 2000). As such, London's recorded music sector is heavily centralised in a few key areas, where Soho and Shoreditch have historically represented

some of the key zones (Watson 2008). The relationship between local buzz and global flows is a symbiotic one, where one feeds into the other (Amin 2000), and a coherence in communication and tacit rules is created between regional clusters (see Latour 1986). Major cities with prominent clusters rely on this duality to remain attractive in international networks.

Network infrastructures within these anchoring points that promote collaboration is all the more crucial to the music industry, as it continues to diversify its cross-industry partnerships to increase competitive advantage. It is widely acknowledged that the digital age has engendered significant strain on the music industry, which has led record labels to diversify revenue streams through partnerships with the television and motion picture industries worldwide (Wang 2012). Considering all the major record labels are owned by large media and/or technology conglomerates that are heavily inscribed into the wider CI economy, music's inscription into a tightly interwoven network has led its production output to play an increasingly important 'second' role in media productions through these partnerships (Wang *ibid.*). It is within this context that the music industry is considered highly collaborative and focused on building strong partnerships both on a local scale and in international pipelines (see also Watson, Hoyler & Mager 2009).

3.3 Limitations

Digital technologies and modern telecommunications have led some to announce the 'end of geography' (O'Brien 1992) or the 'death of distance' (Cairncross 1997). Wellman's 'networked individualism' (2001: 238) brings to light that grouped approaches to production are reliant on social ties proper to individuals, rather than interpersonal community ties. A general neoliberal push for individualism (Neff, Wissinger & Zukin 2005: 314) is observed more widely among many cultural workers (see also Mould 2018; McRobbie 2016). Changed lifestyles through increased mobility, networked individualism, and self-sufficiency lead to *place* playing a more accentuated role in identity formation. Similarly, 'net-

work sociality' posits that socialisation is increasingly characterised by individualisation and technological embeddedness (Wittel 2001).

Social relations and embeddedness are nuanced, where a further push is observed toward individualism as a result of neoliberal policy, labour market trends, and technological innovation (McRobbie 2016; Beck 2002). CI workers are thus often found "*lifted out of their contexts and reinserted in largely disembedded social relations*"¹⁴ (Wittel 2001: 65). A new perspective arises on a reconfiguration of social relations as a result of technological innovation where social relations and transactional activity are increasingly centralised in economic clusters (Florida and Jackson 2010). Lastly, co-working spaces and curated environments that are restricted to the open public also potentially exacerbate the inequalities inherent to the 'creative class' theory (Brown 2017: 113).

4 Methodology

4.1 Qualitative case study

The aim of this research is to uncover the role of the PMC in the music industry. As part of this, Shoreditch House was designated as an appropriate limited field in which a case study could be conducted. Lune & Berg (2017: 179) define case studies of communities as "*the systematic gathering of enough information about a particular community to provide ... understanding and awareness of what things go on in that community*". Their definition also considers the "*social forces [that] may bind together members of this community*" (ibid).

Baxter & Jack (2008: 544) further note that the qualitative case study as a research design in itself ensures that issues are viewed through "*a variety of lenses which allows for multiple facets of [a] phenomenon to be revealed and understood*". This strategy is most appro-

¹⁴ The notion of social relations being qualified as 'disembedded' is attributed to Giddens' formulations of social relations in late modernity (1991). In this context, social relations are qualified as disembedded if they no longer rely on interactions between agents within an individual's direct environment.

appropriate, as the goal is to uncover specific contextual properties of a phenomenon. The central question approached in this study is to explore how the PMC is embedded within the music economy, and why music industry professionals use it as a space to further their careers. The unit of analysis is how the PMC manifests itself as a network, within the 'bounded context' (Miles & Huberman 1994) of Shoreditch House and Soho House, which are the specific fields in which this case study was developed.

Following Stake (1995) and Yin (2003), the case study is backed on a constructivist paradigm. This is ensured as the central analysis of the PMC is based on the individual perspectives by the participants of this research. This allows for a descriptive approach to the phenomena occurring within the selected space. Geertz's (1973) 'thick description' further lends itself appropriately to this analysis, as this process involves a detailed understanding of the behaviour of people within an organisation, emphasising their actions and behaviours. The framework for this case study is grounded in the data collected. Emphasis was placed on networks and lifestyle dispositions of the subjects.

4.2 Data collection

This research consists of five dominant data collection methods: field observation and notes, semi-structured interviews, correspondences with Soho House members, and geographical mapping exercises. This study takes an iterative approach (Miles & Huberman 1994). The data collection process involved predetermined questions, which changed over time as the interview process and field observation lead to new inquiries, and a reflexive approach to the qualitative data collection strategy.

4.3 Semi-structured interviews & correspondence

Respondent #	Age Range	Industry / Occupation
1	50+	Music / Industry Specialist, Artist Manager, Freelance
2	18-34	Marketing / University Student
3	50+	Music / Artist, Producer, Director, Freelance
4	18-34	Advertising / Project Manager
5	18-34	Sonic Advertising / Director of Business Development
6	50+	Marketing / CEO, Director
7	18-34	Film & TV / Producer, Actor, Freelance
8	50+	Music / Industry Specialist, Educator
9	35-49	Sonic Advertising / Managing Director
10	18-34	Sonic Advertising / Head of Production

Figure 1: Participant information chart

Semi-structured interviews were conducted with ten members of Shoreditch House, each session lasting up to one hour. *Figure 1* displays the essential information of each participant. The interviews explored three key areas: (i) the participant's use of the club in their day-to-day lives, (ii) the participant's views on the role of the club as a network in their professional lives, and (iii) the participant's reflections on the club as a social and cultural driver in London. As Lune & Berg (2017: 70) note, semi-structured interviews permit the understanding of "*the perceptions of participants*", and "*how participants come to attach meanings to phenomena*". These research topics guided the interview process in the effort to bring to light the individual perspectives of participants.

The interviews were recorded and subsequently transcribed and coded according to the central themes. The answers were first pre-coded (Bryman 2016: 245) according to the questions, and an open coding approach (Strauss & Corbin 1990) was taken for the remaining sec-

tions. The subjects by which the interviews were transcribed were determined beforehand, as these themes pertained to the central research question. In certain instances, parallel coding was used in which multiple codes were attributed to data subsets.

A further correspondence via email was conducted with an additional participant who provided a personal account of their use of the club as part of their occupation. The email covered the same subject matter as the questions asked during the semi-structured interviews.

4.4 Mapping

Each participant completed a mapping exercise. The goal was to provide a visual representation of participants' use of the PMCs in their daily lives in relation to London and uncover whether an overall network of interactions between members could be determined. Each participant was given a map of a large section of Central London using a print-out of Bing Maps. Lune & Berg (2017: 179) acknowledge the usefulness of maps in case study research as it provides an adequate sociometric study of an environment within the context of the selected community. Shoreditch House was pinned on each map before the exercise. Participants were invited to pinpoint significant points of interest on the map. This included the Soho House locations they used, primary residence, workplaces and other offices, prominent leisure spaces such as restaurants, pubs and cafes, and commutes.

4.5 Limitations

This study seeks to uncover the role of the PMC in the personal and professional lives of the members who participated. As this is a particular case study, it is not inherently exhaustive of a universal case and instead provides a collection of accounts and subsequent reflections that aim to inform further study of these spaces in the music industry and wider creative industries.

5 Findings & discussion

5.1 Shoreditch House as stage for the new creative

Within the PMC sphere, interior design principles and atmosphere are instrumental in shaping the environments where social practices take place. Bille, Bjerregaard & Sørensen (2015: 34) famously reflect this asserting that atmosphere is a "*way of being together, of sharing a social reality*". A brief overview of this setting provides a context in which CI workers exercise their professions. Shoreditch House was selected as an example.

Shoreditch House is located in a repurposed warehouse. The club is comprised of hotel rooms and two club areas spread across two floors. The fifth floor is the primary interior common area and is comprised of an open space spanning the width of the warehouse. It is divided into five zones with dispersed individual and grouped seating areas and event spaces used to host organised talks and networking events. The sixth floor is the rooftop of the building, comprised of a swimming pool, a dining area, and an indoor restaurant.

The interior design features of every Soho House are highly aestheticized and connotative of bohemian—or urban pastoral—lifestyle¹⁵. For Shoreditch House, an industrial aesthetic is apparent, reminiscent of Bourdieu's notion of aestheticized objects and histories (1984)¹⁶. This industrial aesthetic is visible in principle design features, such as exposed plumbing and ventilation systems, extensive use of iron and metals, visible wooden beams in the supporting structures, exposed brick walls, and the retention of the original window frame design of the warehouse. These are connotative of an authenticity proper to the local

¹⁵ See Harris (2012). See also Soho House in downtown Los Angeles, nicknamed *Soho Warehouse*, which *Variety* (2019) noted as being "*designed to resemble artist lofts*", in a general nod to Los Angeles' street art and musical heritage.

¹⁶ Bourdieu (1984: 5) designates this as a "*capacity to confer aesthetic status on objects that are banal or even 'common'*". This is equally a characteristic which Harris (2012) links to Shoreditch and Hoxton's contemporary connotations of working-class abjection in contemporary popular culture aesthetic (ibid.: 15).

culture of Shoreditch in its historical zeitgeist of local industrialisation and 1980s cultural production. The latter is further reflected through the ubiquity of framed photographs, coffee table books, and other visual artefacts. The interior was described by participants as 'shabby-chic', 'gritty', 'authentic', and as having a 'warehouse vibe'. Much of the interior was also described as mimicking a living room space, as several respondents noted 'feeling at home' in the space.

5.2 Soho House as space for socialisation and third space

5.2.1 Socialisation

The PMC is organised to facilitate interaction between members. Socialisation can be divided into two overarching categories: socialisation in leisure contexts and professional networking. While house rules prohibit members from approaching others who are unknown to them to maintain individual privacy, the frequency of chance encounters was noted as highly dependent on individual cases. Respondents who did not seek to network noted that chance encounters were generally rare, as their social interactions would be limited to their current network. Members relying on intensive networking to develop their social capital reported frequent socialisation in casual contexts during evening events, such as parties, live music events, and film screenings. Respondents who use the club to grow their client base noted that professional social ties would frequently blur and evolve into personal friendships.

Membership was widely noted as being deeply embedded in professional life, as participants noted the ubiquity of work-related networking. For several respondents, their membership was purely career driven. One participant who often worked with music and film industry workers noted making new contacts daily and felt pressured to 'keep up' with networking. They described keeping up with the local buzz as 'infectious' and crucial in developing prospects of collaboration with actors, musicians, and other artists.

Respondents from the sonic advertising subsector described that the club's value proposition reflected the requirements of their business

practices. One noted his profession as being highly 'relationship-driven', where taking music producers and advertising clients for lunch or dinner 'somewhere special' in exchange for work is conventional. He referred to his membership as a 'status symbol', as clients visit the club for its exclusive experience. The space thus contributes to the construction of personal reputation through socialisation and consumption.

One participant, a record producer and business owner, noted that he created important professional ties at Soho House. As a recent example, he met a film producer for whom he would eventually produce the score of his latest production. This was a direct result of having connected at Soho House.

Interviews with founding members suggest that the club's inherent sociality has starkly evolved since Soho House first opened. One respondent, a founding member, contended that the club originally harboured a 'genuine community of interest—a socialisation' in contrast to the increasingly work-based networked behaviour of today. Another founding member noted:

I first joined in 1997. Then it was like a social scene, where ... we could go because everything else was closed and have food and drinks till 2 am. We used it socially until 2002. Then I used it more for professional networking until 2006. Soho House was the hub of people hustling and networking.

The social makeup of the club has thus changed drastically over time, and its perception as a social space remains a personal case for each member. According to founding members, this evolution was attributed to two developments. First, the club accepted more members in part due to an altered value proposition targeting freelancers and members of the creative community whose occupations require frequent travel and remote work. Second, innovation in mobile technology led to the ubiquity of smartphones and laptops in the club. Respondents described a changed atmosphere. For one respondent, the club appears more 'like walking into an office', having lost its original 'coolness', as it became a 'modern members club in a digital age'. This is equally visible

in *House 7*, the club's online proposition, geared to offering a digital home for its increasingly digitally native customer base.

It was widely acknowledged from respondents that Soho House, in its exclusivity, serves as a filtration system, where members of the creative community assert their membership of Soho House as a calling card. One respondent reported making connections with other Soho House members easily outside of the club thanks to their membership. Affiliation to a PMC is a universal indicator by which social inscription into the creative community can be easily recognised by peers in annex industries.

5.2.2 Third place

Soho House is used as a 'third space' by its members—or a liminal space that is neither an office nor a place for pure leisure. Work and leisure are regularly blended to accommodate co-working as part of its value proposition.

One respondent described this blend as one determined by the club itself. They noted that after 5 pm, interior lights would be dimmed as the volume of the music would increase, ultimately leading to a programmed transition from work to leisure. This sentiment is also sustained by organised film screenings, live music events, and creative talks. Several respondents also equated social events after office hours at Soho House as both casual and professional. A staple feature of the interior that lends itself well to illustrating this concept is the third section of the 5th floor, where large team working desks serve as table-tennis tables after 5 pm.

The space equally lends itself to the possibility of chance encounters with industry peers. Soho House's model was originally conceived on the premise that the social and the transactional sides to creative business operate in symbiosis. One respondent stated:

You were seeing groups of people working in music, fashion, media, even advertising who were spinning off each other. But pre-social media you couldn't really network very easily. And if you wanted to find those people, aside from Groucho's, you'd be in a certain restaurant, or you'd

be talking at the bar in a night club, about quite an important piece of business you'd want to do. And it would be casual, but you'd be bothered by the music or the crowd.

Soho House's value proposition is grounded in the provision of a space that reflects the *modus operandi* of the music industry and wider CI workers in developing transactional ties in informal environments.

Membership to Soho House often comes part and parcel with, or is a job requirement for, many positions occupied in the music industry. Roles in artist management, creative production, and marketing are frequently tied to a Soho House membership. By extension, artist managers and performing artists are often compensated for events at Soho House with memberships. One respondent, an artist manager and senior executive in the music industry reported receiving his membership as a gift, as a result of bringing artists in to perform at Soho House. A membership is thus not an obligation, but it is highly tied into many occupations and serves as a facilitation to expand local networks, gain access to the local buzz, and be inscribed within global communication pipelines. Participants noted that executive meetings and label events occur so frequently at Soho House that lacking personal access would be a great inconvenience. One participant, a record producer and label owner, noted that Soho House is a convenient environment to take work relationships for lunch or a brief meeting. Similarly, a founding member, formerly active in London's music and nightclub scene, noted the importance to its members of having a reliable place for casual encounters where they could also conduct professional meetings, describing Soho House as a 'neutral ground' for ideation and conversation. A membership is thus inscribed within personal lifestyles, either on the member's own accord or inferred through their occupations.

5.3 Shoreditch House as a node of Soho House

A clear network became visible through mapping exercises undertaken by members. The empirical map data collected from participants demonstrates that Shoreditch House is deeply embedded within the network of Soho House locations around London. All respondents noted

having their main workplace located near their most-frequented house. The data confirms that the use-patterns of Soho House and Shoreditch House are highly clustered, where members cluster around Shoreditch and Soho. Its members rarely make exclusive use of one location and will frequently navigate between them. Therefore, it is important to consider Soho House as a network in and of itself.

The club plays an auxiliary role in their daily lives, acting as a space they frequent as part of their daily routine. A clear network is visible in the mapping exercises undertaken by members.

Respondents noted that the club plays an embedded role in their professional and personal healthcare routines and is deeply incorporated into their daily commutes between their residence and office. Free time would be used to visit one of the club locations. Often-cited reasons included chance encounters with acquaintances and industry professionals, using co-working spaces, or for joining organised events at Soho House and Shoreditch House. Most respondents reflected a lifestyle mostly geared toward Soho House, with commutes only appearing between residence, places of work, and the clubs. For several members, the practicality and sociability of Soho House meant that it has come to replace most of their leisurely experiences in London. In addition to co-located behaviour around consumption, the data equally confirms clustering for production around the Houses, adding to Watson's (2008) seminal research of the clustering of the recorded music industry in London.

Geographical connections remain strong within the realm of work-related activity and local consumption practices. As it pertains to cultural production, respondents also noted being in close contact with Soho's music and advertising clusters, often using the club as a central meeting point. For Shoreditch House, the music industry came up several times in interviews in relation to the cultural past of Curtain Road (Strong Room Studios still being a noted hub) and the area's vibrant music scene of the 1980s and 1990s.

As a result of the geographical position of the clubs, Soho House offers a practical environment for meetings between employees from dif-

ferent companies, and, thus, operates as a neutral zone for these employees to meet. The primary data confirms that with Soho representing a central location for much of the independent music industry, the motion picture industry, and advertising. Respondents noted developing their professional practice and expanding collaborative opportunities as a result of the PMC, and frequent meetings between members across the various locations would occur as a result. Soho House is uniquely placed to facilitate cross-industry collaboration between companies and freelancers. These observations underpin the notion that Soho House operates as a network in and of itself and is highly connected to local production companies and freelance networks.

5.4 Private member clubs in the global music economy

With the music industry as an increasingly international-facing industry (see Maguire & Matthews 2014), Soho House plays a significant role in the global music economy. The company's global expansion in preceding years has attempted to accommodate the increasingly internationalist nature of the global CIs, where major metropolitan areas, such as New York City, Los Angeles, Berlin, and Amsterdam, are now so-called 'anchoring points' in global industry pipelines. Through this borderless perspective on the global music economy, the transfer of tacit knowledge in proprietary spaces is all the more valued, and Soho House identifies as such a beacon that effectively facilitates cross-communication within the music industry and across other subsectors, such as the advertising and motion picture industries.

Based on interview data, members value the club as a space that provides continuity in their lifestyles, common language, and tacit codes in closed groups worldwide. The clubs are visited with the assumption that this continuity is maintained, making networking opportunities highly likely, and chance encounters with familiar industry peers abroad a regular occurrence.

Several members in senior positions within the recorded music industry noted that the club serves as a personal homestead overseas, as several participants noted frequent use of its overseas locations. As

such, while Shoreditch House is deeply embedded in East London's music economy, it is also directly connected to metropolitan areas overseas. Soho House locations thus serve as single nodes in a complex globalised network of creative professionals. A managing director of an artist management firm noted a benefit in seeing similarities in interior design and service provision. He noted that during business trips, a membership offers a source of comfort and a 'home away from home' where they could find 'instant familiarity' abroad in foreign cities, and that random encounters were likely to happen.

The fact that the Houses should be considered as one global network, where one location represents a node, is important. This in itself is deeply reflective of the current state of the recorded music industry as a whole and the interconnectedness of subsectors in the creative industries; one that inherently transcends borders and is highly dependent on close network ties and valuable interrelationships across a number of other sectors, such as advertising, and film and television. Accessibility to global regions is greatly facilitated for its customers and for consolidating its global creative community in a way that brings clear benefits to business development.

Respondents who are senior members of the recorded music industry were asked whether Soho House plays an important role in their occupations. Several respondents in the music industry noted the frequent use of Soho House in Los Angeles (West Hollywood and Downtown) during business trips, and they equally noted the benefit of seeing members of the British music industry overseas thanks to the clubs. A Los Angeles-based British record producer noted that members clubs are helpful to the large (and ever-growing) number of independent managers, artists, and producers who do not have access to a permanent office space. This respondent added that impromptu meetings and networking opportunities frequently occur, noting that in major cities such as Los Angeles, Soho House venues are practical for bringing people together who are not permanent residents of the area. It is apparent from these responses that private clubs act as a crossroads for lifestyles and work schedules that are not bound by a single location.

The empirical data demonstrates that PMCs are evident locations for identifying an archetype of the CI professional. While on the one hand, much of the taxonomy and characteristics of contemporary cultural theorists are observed and widely confirmed, it also demonstrates the internationalised nature of the music industry and deep reliance on other CI subsectors. It also brings to light the importance of localised nodes in major cities in the global music economy and the value such social spaces have to its users and for improving individual networks in global pipelines. Within this context, PMCs' role within an increasingly digitalised economy is also apparent, where a heightened homogenisation of communication practices means that common codes and tacit rules proper to the music industry move globally at a rapid pace and uninterrupted. The PMCs appear to operate as a neutral zone in which this habitus is assured across the most important locations of the industry. Its interiors are equally homogenised, and its membership professes a mutual recognition of power relations and sociality. These nodes are especially important considering, drawing from Castells (2000) and building on the observations of McRobbie, the global economy has perceived a clear shift from hierarchical relationships to ones determined by complex and intricate networks among peers.

For Soho House members, it would appear that there is not only a desire to be part of these closed groups, but that such an alliance is even a necessity to retain a certain threshold of influence and success in the music industry. The role of private members clubs in music business professions that depend on global relationships is apparent, as they play an instrumental role in homogenising communication between industry locations, consolidating occupations that are highly digitally dependent by means of integrating work-life and face-to-face social events, maintaining fluid inter-sector relationships, strengthening community ties internationally, and significantly facilitating tacit knowledge and transactions.

5.5 Tentative limitations to the private members club

Empirical findings for this study suggest potential limitations to the PMC structure as a new model for improving community ties and for accommodating the lifestyle of an increasingly freelance workforce.

5.5.1 Global pipelines & social exclusion

The data collected from interviews with members appeared at times critical of the private member club model. Criticism often pointed to an inherent change in the strategy of Soho House from a unique, exclusive, London-based club to a global network.

One respondent, formerly active in London's nightclub and recorded music scene, detailed the origins of Soho House's model as one founded on a pre-existing template of London's contemporary club culture—embodied at the time by competitors like Groucho's. However, whereas the barriers to entry were originally founded on creative practice and symbolic and economic capital, newer iterations of the PMC include added dimensions of having a global-facing and cosmopolitan lifestyle disposition, with rich social capital to boot. Soho House now represents a field in which various—and at times indeed contested—definitions of *creatives* coincide. Its membership implies a certain cohabitation between the traditional definition of an artist, for those who can afford it, and those creative industries professionals who are perhaps not practitioners as such, but who are nonetheless deeply embedded in the creative industries supply chain.

These new barriers equally lead to questioning the impact of PMCs on inclusiveness and openness to diversity and whether these spaces raise opportunities or, on the contrary, hinder knowledge transfer. In fact, primary accounts of members and field notes reflect the deep imbalances and inequalities present in the wider creative industries sub-sectors. One participant described the club as being a safe space for members of the LGBTQ+ community, yet joined other respondents in underpinning that BAME individuals remain underrepresented—a prominent characteristic strongly reflected in the music industry. While the club's inscription into a global network raises the profile of its local

neighbourhood, another respondent similarly noted the club may equally distance itself from local communities by excluding local emerging artists, such as grime artists and indie artists, from creative networks that may prove necessary for developing crucial ties in music industry circles¹⁷. This would further confirm that at the root of this contested creative class, many individuals within the creative community—singers, artists, performance artists, and visual artists—are de facto excluded from these otherwise consequential knowledge spheres and network-intensive environments. This is further confirmed in Brown's (2017: 121) research on co-working spaces and their exclusion of industry workers who do not 'fit' the membership of curated spaces. It could then be posited that the social ordering of an elite music industry subset could thwart upward mobility for those who lack access to these environments¹⁸.

5.5.2 Limitations to club as 'community space' & increased individualisation

The extent to which such clubs are in themselves communities is an appropriate annexed question. The constant always-in-motion nature of many professionals within the club would suggest that community ties, while diverse and international, may arguably not be locally strong. Founding members agreed that the club's original iteration was firmly grounded in a strong and time-specific sociality, where a PMC fashioned on dance and nightclubs in the 1970s and 1980s would be opened for individuals from that scene—for those whose demands would in no way be satisfied by gentleman's clubs.

This sociality evolved as a result of increased demand, changes in corporate strategy, and technological advancement. Data collection

¹⁷ This confirms Bathelt & Taylor (2002) who noted that strengthened external links to international flows end up overshadowing local environments, where local flows of knowledge are increasingly ignored.

¹⁸ This equally sustains previous assertions that co-working spaces are generally disembedded from local communities, and they instead contribute to social inequalities that "*stem from the reappropriation of urban public space as a consumption-based amenity landscape for a 'creative class'*" (Leslie & Catungal 2012; via Brown 2017: 116)

revealed a pragmatic interpretation of the members club where members' attachment to Soho House was primarily in the spirit of self-fulfilment. Social dispositions of the club's members would be increasingly individualised or, as Brown (2017) described, *alone together*¹⁹.

As such, respondent #9 recalled his own experiences of socialisation as being unsuccessful:

My experience over 20 years is that usually 95% of the conversations are guaranteed to go nowhere. And the real business must be done somewhere else, because it sure ... isn't being done there. I just get the feeling a lot of [the talking] is stroking people's egos and talking about abstract ideas. I've experienced this a lot. ... I knew nothing would lead anywhere after a meeting at Soho House.

Soho House appears as an environment in which habitus is subjected to collective policing behaviour. This participant contended that members 'project their own ideas of self-importance, these ideas that the meetings are important.' Respondents equally noted the club's role as a place where certain members 'use the space as a place to be seen'—in other words, performative behaviour stems from the desire for peer recognition²⁰. Respondent #8 corroborated this, describing this as being a 'see and be seen' area, where people 'are mostly focused on themselves, presenting themselves, and making it look like they're important.' When asked about his experience, the respondent observed that many members tend to use the space as an opportunity for self-promotion. Strong community ties would then be thwarted by an increasingly individualised alternative, where perception and performance take the upper hand.

To some respondents, memberships appear more transactional rather than purely socially inscribed. Respondent #8 noted that the club is 'supposed to engender this idea that [its members] are equal', but described the club as 'being an illusion that you're a part of something, [but] at the end of the day, if you can't pay your membership, you're no

¹⁹ See also Spinuzzi (2012)

²⁰ See Waring (2008) for an elaborate analysis on this subject in the field of clubs

longer a member'. Like a lifestyle trait, one could assimilate it and relinquish it at will. Some respondents described this aspect as a game of appearances, where the membership is itself a wilful participation in an artificial social hierarchy to facilitate identification of who is 'in' and who is not. In other words, Soho House would distinguish the 'in-crowd'.²¹

An inherent inscription into the attention economy, and by extension the reputation economy, can be identified in the controlled social environments of the PMC. These spaces play a pivotal role in broadcasting one's image as a means of raising their digital reputation and brand. The club's exclusivity and reputation accommodate the networked sociality of its digitally native membership and form a vital part of the digital infrastructure upon which the music industry and other CI subsectors rely. In other words, and in reference to Castells (2000), private clubs are exclusive social environments that are crucial to developing close ties that have been transformed by digital networks.

6 Conclusion

This study explored the role of private member clubs in the music industry. The primary data collected for this study indicates that PMCs play a significant and pivotal role in the music industry and, by extension, play an important role in connecting music business to other CI subsectors, thereby consolidating much of the creative economy.

A clear evolution is visible in the value proposition of PMCs, where its original iteration of being an exclusive place for the most elite to find common ground was replaced as the cultural and economic momentum of the creative economy grew from the early 2000s onwards. A closer examination of the club's sociality reveals the archetype of the music industry worker. Personal and professional lives are deeply enmeshed, and careers are increasingly developed outside the formal workplace in

²¹ This point is further sustained by McRobbie's analysis of cultural labour, which asserts that "*a double process of individualisation*" has taken place, in which there is, on the one hand, an "*increased obsessive culture around celebrity*", and, on the other, an inherent change to social structure in which "*people are increasingly disembedded from ties of kinship, community and social class*" McRobbie's (2002: 518).

liminal spaces, where lifestyle dispositions and tacit codes have become the hardware upon which social bonds are created. It is used as a space to act out individualised behaviours in a controlled social space, where hierarchies are replaced by intricate networks of affiliation.

The PMC also reveals a stark contrast in music industry operations before and after the digital revolution. In these environments, its connections to (and co-dependency of) the advertising and motion picture industries are clear. Inter-sector relationships seem all the more valued, and the PMC has positioned itself as a bridge between industry subsectors, promoting crucial cross-collaboration and joint ventures. This paper can therefore conclude that the PMC model plays a vital and important role in the social and economic infrastructure of the music industry.

However, while the PMC model continues to be beneficial for many of its members, its exclusivity may exacerbate existing frictions within the industry. Aspiring musicians, producers and intermediaries from disadvantaged backgrounds are de facto blocked from an important and consequential network. Local artistic communities are increasingly distanced from global circuits. A digitally native populace shows signs of gravitation toward individualism and self-mediation. Spaces allowing for personal and professional lives to be combined further the normalization of precarious CI labour conditions, and its concomitant anxieties.

Ultimately, the PMC has positioned itself in a consequential spot for the global music industry. Most, if not all, influential CEOs, executives, managers and musicians convene and socialize at Soho House. Lil Nas X's most recent interview with *Variety* was conducted over lunch at Soho House (Herman 2020), for instance. So while the original magic people who gathered at Greek Street may have left, and while the original magic may have been diluted over time, it is worth considering that perhaps the very magic that drives the music industry has simply just changed face—and Soho House along with it.

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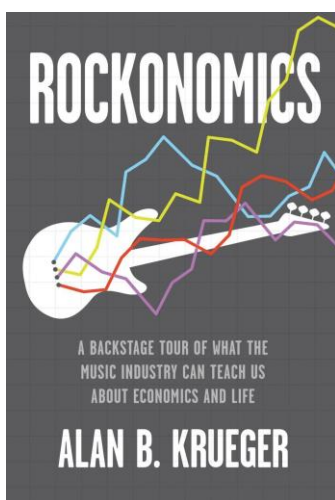
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Rockonomics: A Backstage Tour of What the Music Industry Can Teach Us about Economics and Life by Alan B. Krueger, Currency, New York, ISBN 9781524763718 (hardback)



Book review by Daniel Nordgård

In June last year, Alan B. Krueger's final book was published. It was a much-anticipated work and, sadly, released postmortem, after Krueger passed away on March 16, 2019. While the music business and industry were hardly the core themes of his research, he nonetheless managed to publish research that have become central and much-sited sources for a broad range of researchers – including myself.

Although Krueger points out that he is neither a devoted fan or a big consumer of music, his writing on the subject is enthusiastic and authentic. In fact, a striking feature in much of his writing, but this book in particular, is that it illustrates his sincere passion for both music and numbers, in equal parts. Throughout the book, Krueger delivers numbers and statistics in parallel with examples, excerpts from interviews, and narratives that neatly frames the points being made and the stories being

told. The book posits several important narratives and arguments – some established by Krueger himself (like the economics of superstars (Krueger 2005)) – assembled in a coherent and well-structured book that is easily read.

Over the course of 11 chapters, Krueger lays out what must be considered the basics of music economics, as well as some of the discipline's more important issues. Some of the chapters deals with explaining the logics, structures and dynamics of the music economy, such as the basic structures of revenue streams (chapter 2), the economics of live music (chapter 6), Intellectual property (chapter 9), or the basics of music streaming (chapter 8). Together, they provide a comprehensive framework on how the music business works. However, they also lead to or tie into other complex and interesting issues, like the power-laws that dictate the economics of superstars (chapter 4), or the supply of musicians (chapter 3). Chapter 4 expands on a topic Krueger long ago established; that the music economy is one that is overtly skewed towards the top artists – more than other sectors.

By returning to and updating his previous work on the superstar economy, Krueger delivers what must be truly sobering numbers and statistics for any aspiring artist or manager; economic success in music is rare. Continuing success is even rarer. Hence, chapter 3 – the supply of musicians – must then be seen in this light, and here Krueger delivers meaningful insights on US-American (and it's mostly US-American) musicians, the precariousness of their work (reminding us where the term "gig-economy" comes from), gender issues and mental health. Given the slim chance of success, coupled with some rather discouraging features of the music industry (see chapter 7: Scams, Swindles and the Music Business), why then do so many work towards a music career? Krueger addresses this by referencing dialogues he's had with artists and musicians from his focus-groups, such as Sheila Stratton-Hamza (p. 58): *"I'm in pain before taking the stage, but euphoric once performing. I feel my essence comes out. I'm transformed as a person"*.

In chapter 5, Krueger speaks to a critical but oft-neglected part of achieving success in music: luck. Clearly your chances of being lucky in-

crease with talent, resources and networks, and these attributes themselves increase your chances of success, if you're lucky. Yet luck (or the absence of it) is rarely talked about in the context of success in music, and very rarely from an economics standpoint. Here, most often, we're served statistics, models and laws. Luck, however, is most effectively communicated through stories and examples, and Krueger cites several, like the references to Sixto Rodriguez, or the meeting between Elton John and Bernie Taupin.

And here in this chapter is where we also see some of Krueger's more political, or ideological views, as when he draw lines between luck and his own successful academic career at Princeton University: "*In other words, we are all better off if we recognize the role that luck plays in contributing to our success, and if we are more tolerant and supportive of those who are less lucky*" (p. 118). These lines are all the more poignant in light of Krueger's tragic departure from life.

Though the book deals with complex issues, these are explained and discussed in a manner that is inclusive and open in both language and illustrations, making it well-suited for students as well as scholars and researchers, or business professionals, politicians or complete outsiders. It is pedagogically written and academically well balanced.

If the book is to be criticized, it is that it can read as a little US-biased, both when it comes to data and examples (one exception being China, in chapter 10), but also academic references. However, given the complex issues already being addressed in this book, keeping it focused on one territory is perhaps necessary. Nevertheless, it works really well the way it is, and I look forward to discussing "Rockonomics" – and Krueger's wider thoughts and analyses – with my students and fellow researchers for years to come.

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Notes for contributors

Submission of papers

All submissions should be made by e-mail to music.business.research@gmail.com.

Authors should prepare and send an anonymous version of her/his paper for double-blind-reviewing. A brief biographical note about each author should be supplied in a separate file. Details should be given of authors full postal and e-mail addresses as well as telephone and fax numbers.

Submission should be in English, typed in double spacing (including all notes as footnotes, references, tables, figures and plates). English or American spelling is acceptable provided usage is consistent.

Submission of a paper to the journal will be taken to imply that it presents original, unpublished, work not under consideration for publication elsewhere.

An abstract of the paper, of up to 500 characters (including spacing), should accompany the article. In addition, a list of between three and six key words, suitable for indexing and abstracting services, should be supplied.

Articles should not normally exceed 7,000 words (without references) in length. If your word-processor is capable of doing a word count please use it to print this at the end of the text, together with the date of the manuscript.

Notes should be kept to a minimum and placed as footnotes at the end of the page.

References

The Harvard reference system is used in this journal: the name of the author, the date of publication and, following quoted material, the page reference, as a key to the full bibliographic details set out in the list of references, e.g. "... citation ..." (Peterson 1990: 56); several authors have noted this trend (Smith 1970; Jones & Cook 1968; Dobbs et al. 1973). (N.B. et al. to be used when there are four or more authors.) The date of publication cited must be the date of the source referred to; when using a republished book, a translation or a modern version of an older edition, however, the date of the original publication may also be given. Where there are two or more works by one author in the same year, these should be distinguished by using 2012a, 2012b, etc. The reference list

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Book volume:

Allen, P., Macy, A. & Hutchinson, T. (2010) *Record Label Marketing*, Focal Press, Amsterdam and Oxford.

Article in edited volume:

Burnett, R. (1996) "The Popular Music Industry in Transition", in *Mass Media & Society*, eds A. Wells & E. Hakanen, JAI Press, London, pp. 120-140.

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Oberholzer-Gee, F. & Strumpf, K. (2007) "The Effect of File Sharing on Record Sales: An Empirical Analysis", *Journal of Political Economy*, vol. 115, no. 1, pp. 1-42.

Edited text:

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