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2 The popular music industry

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The music industry question is straightforward: how to make money out of music? But the answer is 'with difficulty', and pop music as we know it now has been shaped by the problems of making music a commodity and the challenges of adapting money-making practices to changing technologies.

The underlying issue is metaphysical. Music is, by its nature, non-material. It can be heard but not held. It lasts only as long as it plays. It is not something that can, in any direct way, be owned. How to turn this intangible, time-bound aural experience into something that can be bought and sold is thus the question that has driven popular music history since the first wandering performers sang for their supper, and I will examine the changing solutions to this problem shortly. But there's another issue here that needs noting. Music is a universal human practice, like talking or tool making. All of us can do it; all of us do do it: sing to ourselves or our children, hum and chant, dance and tap out a rhythm. To make money out of music, then, means differentiating one set of musical practices (for which we'll pay) from another (for which we don't). The very ubiquity of music in everyday life means that the line between music we make for ourselves and the music for which we go to market is rather more blurred than the music industry would like.

The starting point for an understanding of the music industry, to put this another way, must be the fact that 'popular music' is not the same thing as the sum of the products of the popular music industry. If popular music is the music of everyday life then it is obvious that our soundscape is not just made up of music on the radio, piped through shopping malls or played on our stereo systems. From stretching songs in the shower to skipping songs in the playground to the slurred sing-a-long in the bar, from the music made in churches and coaches to amateur choirs and choral societies, garage bands, front-room string quartets and bedroom electronic boffins, much everyday music is self-made. It often refers to commercial music, of course – as a source of songs and performing styles; and there is a large sector of what we might call semi-commercial music: the *karaoke* night in the pub, the local ceilidh band playing a wedding, the teenage deejay at a children's party. And what this suggests is that in popular music the distinction between the amateur and the professional is hard to draw and easy to confuse. A local club band or singer can suddenly find themselves signed to a major label, paid well to do pretty much the same things they had done for years as amateurs. A musician can 'make it' with a group, have years of fame and fortune only to end up back on the semi-pro circuit, their real living being made outside music altogether.

My point here is that popular music culture isn't the effect of a popular music industry; rather, the music industry is an aspect of popular music culture. The industry has a significant role to play in that culture, but it doesn't control it and, indeed, has constantly to respond to changes within it. Which is also to say that the music industry cannot be treated as being somehow apart from the sociology of everyday life – its activities are themselves culturally determined. As a social activity popular music culture can be mapped along two axes. On the one hand there are degrees of mediation. All musical experiences may in a sense be the same – the hearing of sounds organised into a communicative pattern – but, nonetheless, the way music reaches us can be more or less direct, from the sheer physical pleasure of singing to ourselves in the bath to the alienating experience of hearing the same tune as Muzak while we wait on telephone hold. One way to think about this is in terms of choice: singing in the bath is self-indulgence; we are immediately embarrassed when we realise we've got an audience; Muzak on the phone is a widespread source of irritation, it is music imposed on us by machines. This relates to the second axis: the degree of collectivity. And the paradox here is that the technology which has meant the mediation of music also made possible the apparent privatisation of the musical experience. We can, for example, write the history of twentieth-century popular music culture in terms of a movement from collective to individual activity. The phonograph meant that public musical performances could now be heard at home; the portable gramophone and transistor radio meant that music moved into the bedroom; the Walkman meant that each individual could make a personal listening tape for use even in public places. In general terms, the industrialisation of music, as both a technological and an economic process, describes how music came to be defined as an essentially individual experience, an experience that we choose for ourselves in the marketplace and as a matter of our cultural autonomy in everyday life. This account of music – as something that we can possess – would not have made sense in 1800.

What we are possessing, though, is still an access to a collective world: we buy a record knowing that our taste is shared – and measured by the charts; we listen to a radio station whose appeal is that its deejays can make us feel members of a taste 'community'. Even Walkman listeners, turning in on what they alone can hear in order to block off the noises and people around them are, at the same time, moving outwards, to the material and imagined worlds of the performers, as members of implied audiences and scenes. Popular music culture is, if you like, an immense communication network. Some of these networks involve direct relations with other people (the fellow members of a choir or band or club); others are mediated by record companies, radio stations and tapes made by friends. Such networking is by its nature social, whether we experience such sociability materially, bumping up against people at a concert or dance, or virtually, hearing a singer singing just for us, floating off into an imagined community. If music is a universal human practice, then the experience of music is an essentially humanising experience, a kind of ideal of sociability, a way of making us feel what it is to be engaged with other people. And it is precisely this which gives the music industry its chance to make money out of music: the musical experience is so valuable to us that that value can be realised in commercial terms; but it is also so valuable to us that its meaning can never be constrained or determined by the market, especially given the market's tendency to treat us as atomic individuals. And this is the music industry's problem.

Musical storage

I want to return now to my starting question: how can you turn something fleeting and ethereal like music into something material, to be bought and sold for money? The answer is in terms of storage and retrieval. If you can somehow store music, in such a way that access to that store means retrieving it, re-experiencing the music as music, then people might be willing to pay for that storage device. The changing technological possibilities of musical storage, the possibilities that have shaped the music industry and its practices, are best understood historically.

The first musical stores, if I can put it like this, were musicians and their instruments. Musicians stored music in their memories, not just in the sense of remembering a tune or rhythm in their heads, as it were, but also in the sense of remembering how to reproduce that tune bodily, in a particular movement of muscles and hands and breath. For a musician – this is what defines a musician – music is remembered as much physically as mentally. And making music also involves retrieving the sounds 'stored' in musical instruments, whether simply (banging together two blocks of wood, blowing into a pipe) or with great virtuoso skill (playing a Beethoven piano sonata, an improvisation on an electric guitar).

Here, then, were the first sources of musical money making. A musician would retrieve – perform – music in return for payment, whether from secular or religious patrons, from communities or passing individuals. The more skilled they were perceived to be, the higher returns they could command, and from the very earliest days in all societies one can assume both that there was a push to a kind of craft specialisation (so that for the more skilled musicians music-making became their dominant activity) and that other people could get material rewards off the back of the musician, whether acting as an impresario or agent, selling and negotiating the musical services provided, or as an entourage, keeping the performers sober, making sure they were in the right place at the right time (hence the role to this day of popular musicians' friends and family). At the same time musical instrument makers (sometimes themselves musicians, sometimes not) could command a return for their skills in providing instruments with richer sounds, more robust frames, easier to use. From the very beginning of human music-making there was a necessary relationship between two sorts of skill and activity – making music, making musical instruments. And from the very beginning too the differentiation of specialists from the everyday was not just a matter of skill – everyone could retrieve a song from memory, everyone could make something to bang or blow; but also of social organisation. The development of specialist musicians and musical instrument makers was part of the division of labour that marked the emergence of larger communities and more extended networks of trade and manufacture. In terms of popular music, one aspect of this needs emphasising in particular: musicians' 'value' to communities, audiences or patrons, the skills which enabled them to make a living as musicians, were determined by those communities, audiences and patrons themselves. Whether a musician was thought to be any good or not involved judging them in terms of both their immediate effectiveness but also against listeners' own musical memories, particularly when so much music-making was ritualised, an aspect of social events like harvesting, marriage and death. And even when crafts were organised into guilds, with licences, apprenticeships, etc., music-making was too popular a skill to bureaucratise. A musician was still judged in terms of the music made rather than the apprenticeship served (even if, to this day, classical performers lay out their provenance, as if their playing qualities were guaranteed by their teachers' fame).

The first revolution in musical storage was the combination of notation and printing. Music could now be stored in a score, and that score could be reproduced any number of times. Like most technological revolutions this didn't mean that new ways of doing things replaced old ways (for a score to be realised as music, musicians and musical instruments were still needed) but, rather, that new ways of doing things emerged alongside old ways. In immediate terms scoring meant the emergence of a new music-making figure, the composer (who no longer had to take the stage; composition could now be separated from performance), and a new money-making figure, the publisher: composers needed someone to get their work to market (although, of course, in the earliest days of music publishing, the composer and publisher were often the same person).

Three aspects of this change were particularly significant for the development of a music industry. First, there began to develop a distinction between commercial and non-commercial music. I don't mean the distinction between classical and pop, high and low culture with which we are familiar – so-called classical music is precisely that music produced by the first music publishing industry – but between notated and unnotated music, between commercial music and folk music. The modern music industry, in other words, took shape in ways that excluded the most popular forms of music-making. It depended on ways of composing, arranging and learning music which were not the ways in which music following oral traditions worked. Second, the score put into place a new music-making hierarchy: on the one hand, this led to the nineteenth-century emergence of the virtuoso instrumentalist as star (emerging alongside the newly romanticised composer as genius); on the other hand, it meant that people at home could play composed music too, buying instruments (particularly pianos) and scores for themselves. These processes involved two new music markets: paying customers for live performers (replacing the patron system) and middle-class families for sheet music and instruments and music lessons. Third, the rise of new music businesses and markets meant an increasing concern to protect investments and property from theft and piracy. As music became a publishing industry so it took on the general publisher's concern with the legal protection and regulation of copyrights.

Long before it was a record business, the music industry was a rights business. Its profit making depended on its ownership of copyrights. Once a publisher had established its legal ownership of a musical work (under the terms of its contract with the work's composers) it could both prevent anyone else publishing it and later, under performing rights legislation, license its various uses in public performance. The new music industry was thus as dependent on legal structures as on market demand, and I'll come back to its nature as a rights business later. The final point I want to make here is simply that notational storage was a new way of making money out of musical performance: in the commercial music world a musical event now meant musicians retrieving sounds from scores as well as instruments.

The second major music industry revolution followed the technology of recording: sounds could now be stored and retrieved on discs and cylinders. From one perspective the gramophone was just another musical instrument, a device which 'held' music, music that could be heard once the instrument was played, and certainly in terms of marketing and manufacture there was a straightforward continuity from piano selling to player piano selling (the music stored on a roll) to gramophone selling (the music stored on a disc). As late as the 1960s, in small towns in Britain at least, it was still normal to buy records in a music shop which also sold instruments and scores. But the gramophone (and player piano) were different from other musical instruments in one key respect: music was now stored on roll or disc (provided for the first time as software), it therefore became possible to 'play' a musical instrument without having any musical skills. Music could be made at home as a matter of consumption rather than technique.

The immediate commercial effect was the development of a new industry sector – the manufacture of gramophones and gramophone records. The music industry became part of the electrical goods industry and had a hugely expanded potential market: every household. Domestic record buyers didn't have to be musical, and, at the same time, records hugely increased the potential public use of music, whether by other new electrical media such as the radio or simply in all sorts of places of public entertainment. Rights holders – who were to be given rights now in recorded sounds as well as in musical works – had unprecedented new sources of income. By the end of the twentieth century they were making at least as much money from such public uses as from the sales of records to private consumers.

The most important effect of recording technology for popular music, though, was that it allowed music to be stored and retrieved as it was performed rather than as it was written and thus made possible the commercialisation of folk music. Recording, to put this another way, allowed the mass distribution for repetitive listening of the particularities of a specific performance. Musical qualities such as timbre, tone and rhythmic individuality could now be stored as effectively as melodies and harmonies had been by written notes. A process driven by profit-making thus made commercial popular music out of folk music, out of vernacular improvisation. The global impact of African–American blues and jazz was dependent on recordings; these were not musics to be played from scores. And later technological developments in recording – the electrical microphone, tape recording – had similarly unexpected effects. If record companies began by recording existing musical stars (using their fame to sell the new machines), they became themselves the most important star-makers. A singer like Bing Crosby rose to fame as a radio, record and film performer rather than as a live act. And, similarly, if initially recordings were just that, records of really happening studio events, they became sonic compositions, studio-created works that had never actually been performed and often couldn't be – whether a concoction of doctored noise like the Beatles' *Sgt Pepper* or Glenn Gould's spliced together 'perfect' version of a Goldberg variation. The recording studio became less like a photographer's studio – everything carefully arranged to be captured in a sitting – and more like an artist's studio, the finished product emerging from scraps and daubs and overdubs. To make a record was to make something quite new; no longer to pursue 'fidelity' to an original 'live' event.

I stress this here because the third revolution in musical storage, digital technology, was obviously shaped by analogue practices: it allowed people to do more quickly and easily what they were doing anyway. The CD replaced the vinyl LP, digital editing the tape machine, but the music was much the same.

In the longer term, though, the storage of music as information has had three significant industrial effects. First, it poses in new ways the question of the ownership of music. On the one hand, digital technology extends the definition of what can be owned: from work (the score) to performance (the record) to sounds (digital information); on the other hand, it therefore extends the possibility of theft, whether in terms of sampling (sounds taken from one work and manipulated for use in another) or piracy (digital copies are identical to the original and much easier both to make and to pass off). Second, it changes the nature of musical composition from writing to processing, thus confusing long-established distinctions between music and noise (digital recording has among other things transformed music-making in multimedia such as films and video games). The most obvious aspect of this change (already underway with analogue technology) is that we cannot easily distinguish the roles of musician and sound engineer, and the 1990s rise of the deejay as performer also meant a blurring of the boundary between consumption and production: what kind of musical activity is scratch mixing? But the most interesting is its effect on the meaning of collective music-making. This no longer means getting musicians together physically but virtually, so it is, perhaps, ironic that the most successful post-digital popular music, rap, formally combines digital studio composition, ingenious engineers, with good old-fashioned face-to-face improvisation. Third, digital technology makes possible the process that is described by the ugly word 'disintermediation', whether this means musicians sending their works to listeners directly (thus cutting out music publishers and record companies) or listeners downloading music from record companies directly (thus cutting out retailers).

Within the music industry itself, the effects of digital technology are still described as possibilities, and the immediate policy is to encourage some (making money out of sounds) and discourage others (piracy). I'll return to the future later. The point I want to stress here concerns the past. The contemporary music industry has been shaped by its history. In summary it is:

a rights industry, dependent on the legal regulation of the ownership and licensing of a great variety of uses of musical works
a publishing industry, bringing those works to the public but itself dependent on the creativity of musicians and composers
a talent industry, dependent on the effective management of those composers and musicians, through the use of contracts and the development of a star system
an electronics industry, dependent on the public and domestic use of various kinds of equipment.

The supply side

One way of describing the music industry is as a business in which both the supply side (the musicians) and the demand side (the consumers) are irrational; record companies, which make their money from bringing supply and demand into line, are thus organised around the bureaucratic organisation of chaos. Two consequences of this are striking. First, as in other cultural industries, the vast majority of the music industry's products are, in economic terms, failures – fail to cover their costs. Such losses are more than covered by the size of the returns on successes but an industry in which more than 90 per cent of product is loss-making is obviously organised in a peculiar way: failure is the norm. I'll come back to this. Second, there are running tensions between record companies and their artists, on the one hand, and their consumers, on the other. The record industry is organised around legal contracts, on the assumption that companies will rip off musicians, musicians rip off companies unless restrained by the law, and much of the music industry's lobbying efforts go into trying to stop consumers doing things – home taping, for example – or at least to charge them for doing so.

Both these conflicts reflect the problems of musical ownership; both can only be resolved by the legal regulation of rights. The starting point here is the general legal principle that 'creators' (writers, artists and inventors) must be encouraged both to create and to make their work available for public education and delight. On the one hand, this means that creators should be financially rewarded for their work; their reward should be sufficient to cover their investment in the acquisition of the appropriate skills and resources. On the other hand, to be accessible for public use their work must be available at reasonable prices, so that society as a whole may benefit from it. Hence the copyright system: musicians get their financial return on their work by licensing its use by the public for a fee. The music is publicly available and the more it is used – the more popular it becomes – the greater the returns to its authors, the greater the incentives for other people to create too.

There are two problems involved in turning this ideal into material practice. First, individual artists and performers are rarely in a position themselves to get their work to the public. They need to contract other people – agents, promoters, publishers, record companies – to organise and promote concert tours, to manufacture scores and records and CDs. Even Internet selling is going to need some intermediaries: well-known groups may be able to reach a significant market directly; unknown groups are going to need something – probably a branded music provider, the Net equivalent of a deejay like John Peel – to make themselves known. Second, the sheer cost of policing one's rights in a work is prohibitive. To track down its unlicensed uses, collect fees owed from licensed premises, monitor local radio stations and hairdressers, is likely to cost rather more than the fees so gathered. In economic terms the copyright system therefore depends on collecting societies (like the Performing Rights Society in Britain), set up by publishers and composers as non-profit organisations to administer licences and licence fees on behalf of all music rights holders. Such national societies (most established at the beginning of the twentieth century following international agreements on copyright) also collect the monies due to foreign composers and publishers in a chain of reciprocal agreements (a chain now under threat from the rise of multinational publishers and the direct digital flow of music across national boundaries). For creative artists to benefit from their creative rights, in other words, they have to do deals with publishers, deals which can and usually do mean ceding some of their creative power. Except in the case of well-established stars with a known market, record companies rarely act simply as distributors, a mechanism used by artist A just to reach an audience. Rather, the company will attempt to shape A's music to meet its own understanding of the market, and the power to shape music this way is built into artist/label contracts. While popular music thus depends on the collaboration of creators and bureaucrats, the tension between them, a tension usually read ideologically, as *art vs commerce,* is built into the system.

Until quite recently (and certainly when compared to the film and television industries), the music industry did little formal market research, except in the form of the charts. And even the charts, a measure of what is selling and what, given airplay figures, is likely to sell, are primarily used as a means of stock control: further pressings can be quickly made of records that are showing a sales success; all work on non-selling records can be stopped. The industry's assumption of the essential irrationality of the music market can be seen in the respect paid since the earliest days of Tin Pan Alley century to those people (song writers, talent spotters, deejays, producers) who are thought to have 'good ears', whose understanding of popular taste seems to be 'instinctive'.

If some industry ears are better attuned to popular taste than others, no one gets it right every time, and the music industry has therefore developed two devices through which to keep control of unreliable demand. The first device (familiar in other cultural industries) is a *star system.* Stars can be defined as musicians whose past sales successes are taken to guarantee their future sales successes. By thus countering the usual demand uncertainties stars have been absolutely essential for the record industry, often providing the great majority of a label's profits (Elvis Presley for RCA, the Beatles for Capitol, U2 and Bob Marley for Island). Star-making, rather than record selling, is a record company's core activity; the latter is dependent on the former. This means that the music an act or artist makes has to fit a star image and personality; these days as much money is spent on image making as on music-making and no one gets signed to a record label without a discussion of how they will be marketed.

The other way in which the music industry seeks to bring order to the music market is in the use of *genre labels.* Pop music marketing has always meant marketing different types of music to different types of consumer. This is most obvious in the lay out of record shops: discs are racked as rock, country, dance, rap, reggae, world music, and so on. In broader terms, each genre is a kind of popular music world in miniature, with its own magazines, radio programmes, live venues and specialist shops and web sites. As Keith Negus has shown, far from record companies imposing a single corporate culture on these worlds, they seek, rather, to accommodate the different ways in which different musics are used by different audiences. Each record company division – rock, salsa, country, rap – has its own commercial and cultural character (Negus 1999).

Demand

This is to return to my starting point, that we can only understand the popular music industry in the context of a popular music culture, and I want to turn now to the demand side of the equation, to the question of what people want and get from music. The obvious point here is that one can only make money out of music if people are prepared to pay for it; the less obvious point, perhaps, is that this may be less a matter of how a particular piece of music is valued than of the circumstances in which music of some sort is taken to be necessary. We would find it odd nowadays, for example, to attend a funeral without music, to watch a film without a soundtrack, to walk round a shopping mall without background sound. If the development of a music industry depended on the development of a music market, so that performers and composers had to compete for public attention rather than produce music to order for a patron, the emergence of such a market was itself dependent on changes in the organisation of people's lives and leisure. Entertainment as a social activity – an activity necessarily musical – shaped the music industry as much as it was shaped by it.

I want to discuss this here in terms of three issues. First, *the special vs the everyday*. Historically music has been used to mark out the special event – the religious service, the rituals of death and birth and coming of age, celebrations of life, moments of grief. Music marks out both a space and a time as being different from the everyday. It works both to intensify the appropriate feelings (it's as if music makes possible a particular sort of engagement, an undistracted concentration on the moment) and to collectivise them. We feel the music individually but also as a form of what the ethnomusicologist John Blacking called 'fellow feeling' (this is still obvious in the use of song in the playground or at a football match). There's a common experience of music here (even if it is accounted for differently in different musical ideologies) as something that 'takes us out of ourselves', which transcends the everyday material world. And the point I'm adding is that this sort of musical experience is associated with – made possible by – special occasions.

Nowadays, by contrast, music accompanies all activities. People are woken up by an alarm radio set to a music station; they shower or shave to music, go to work wearing a Walkman or listening to a cassette or CD in the car. People listen to music while they work, shop and hold on the telephone. There is music playing while we eat and drink, wait for a bus to come or a train to start, when we sit at a computer screen or do aerobics in the gym. It is difficult to think of any activity now, except perhaps sleeping, which is not carried out to music, whether music we choose or have imposed on us (and there are by now several collections of bedtime tracks). The twentieth century meant an extraordinary explosion of music. We don't just hear music everywhere and all the time but take it for granted that we can hear music from any place and moment in recording history.

There is no doubt that the ubiquity of records has profoundly affected the relationship between music and noise. Much of the music we hear is now noise, whether as an undifferentiated ambient sound or because of its irritating effects. Partly in consequence, the music we do listen to draws on what once would have been heard as noise, most obviously volume: the sheer loudness of contemporary popular music as it competes for attention with every other noise in our soundscape is perhaps its most striking aesthetic feature. And there are numerous other electronically produced sounds that would have once been heard as 'interference' but which are now composed into the music, as it were. What hasn't changed, though, is the belief that music is or can be a special experience. Under certain circumstances we do still pay special attention to the soundtrack of our lives, and it is these circumstances that the music business has to understand.

The industry itself has a touching faith that it is the songs (and singers) themselves which create the right circumstances. If the marketing teams and radio pluggers and video makers can get people's attention for just a moment then listeners may be 'hooked' by a tune or lyric or tone of voice. But the occasions on which people really listen to music are also institutional and emotional. The rise of dance music as the central pop form in Britain in the 1990s is not so surprising when we consider the importance of the dance floor as a site of serious listening, just as the continued popularity of the big ballad (as sung by Céline Dion, say) testifies to the way in which people's love lives sensitise them to the emotional power of music (as well as vice versa). In short, we could say that the popular music industry depends, first, on the routinisation of leisure, on the regular rhythm of work and play, the weekend and the holiday, on the concept of having fun, and, second, on the ideology of romantic love and its consequent narcissistic narratives of feeling. Music is still about special events, it's just that these events are now either commonplace or personal.

This leads to my second issue: *the public vs the private*. Again, in historical terms, we can describe an obvious shift in the experience of popular music from collective activity to private pleasure. Indeed, what would probably most strike a visitor to the twenty-first century from, say, 1850, would not be the sounds of the streets (Victorian cities like London were already cacophonous) but the amount of music in the home, and the development of domestic space as pleasant and comfortable has clearly meant, in part, making it a space in which music plays. In terms of public/private, though, the domestication of music is not straightforward: if listening has been, in a sense, privatised, what we listen to has not. The radio, record and television industries flourished by bringing public events into the home and so we have a situation in which many people who've never seen an opera or a jazz quartet, a punk band or a drum'n'bass deejay, regularly stage such events, on record, in their living rooms.

In more general terms it can be argued, I think, that the effect of twentieth-century media was less to privatise musical and other cultural experiences than to blur the distinction between the public and private spheres. Is listening to a live Proms concert on the radio or watching Oasis on *Later* on television a public or a private activity? And if concert halls and rock clubs can take shape in the imaginary spaces of the bedroom, so public spaces can become the settings for private events. It has been said that the juke box, at least in the United States, saved the record industry in the late 1930s and early 1940s – more records were then sold to juke box operators than directly to the public, and for United States servicemen and women, moving about the country as they prepared for war, the juke box became a particularly valuable way of establishing familiar space in a strange camp or bar. More recently, one of the earliest uses of digital technology was in the development of *karaoke*. The appeal of *karaoke* seems to be the way it allows private people to become public performers and public performances to become private happenings.

Rather than talking about the privatisation of music we should, perhaps, see music as the medium through which we negotiate the complex relations between our public and our private selves. Music's ability to move from stage to sitting room, from the emotional nuances of a particular love affair to the noisy clamour of barroom sentimentality, is precisely what makes it so important in our lives. This is certainly how the music industry sees it. What has mattered for sheet music sellers and film star makers, for record companies and radio programmers, has not been the privatisation of music but its individualisation. For the industry to flourish it needed to encourage a particular kind of musical consumption: buying things, whether records, tapes or discs, concert tickets or club admission. And this in turn means offering music as something that consumers can possess, can own in the same way as the other goods we buy. This is one reason why the industry's campaign against home-taping was so unconvincing: on the one hand, we were told that to buy music on record was somehow to make that music ours; on the other hand, we were told that we couldn't therefore do just what we liked with it.

The individualism at the centre of commercial popular music accounts for the third issue I want to discuss here: *identity vs difference*. Music seems always to have been important for collective identity – communities know themselves through their musical memories – and it has also always been manipulated by nationalist politicians, whether in the form of national anthems or a contrived folk music which can be used to mark off non-nationals as 'other', outwith 'our' song. What the commercial music industry has done is make the way music can offer a sense of belonging (and exclusion) a part of its sales pitch. Whether through the star system (fans identifying with idols) or, more significantly, through genre marketing (types of music – country, heavy metal – standing for ideological communities), record selling has meant persuading people that their music market choices aren't just a matter of self-indulgence but also link them to communities. Musical tastes matter so much to people because, however vainly, they take them to be a statement of what sort of people they are.

One paradox here is that the most obviously 'commercial' of music industry practices – merchandising, say – are also those most obviously tied into the creation of a fan community (in the construction and marketing of boy bands to young girls, for example). One could perhaps conclude that what seems most glaringly commercial from the outside (the way pop acts are packaged for the teen market) doesn't seem so manipulative from the inside, for the teen consumers who belong to the Westlife or Boyzone fan clubs. Rock fans are certainly notoriously blind to the role of merchandising, packaging and smart promotion in their own investment in Oasis, Beck or Travis. Woe betide the rock critic who suggests, as I once did, that there was not much difference in the selling of Genesis and Bros! Gender ideology is certainly at play here too: the same boys who despise girls for their collection of Boyzone mags and toys will proudly show off their collection of Radiohead b-sides and tour tee-shirts; girls, it seems, are dupes; boys are cognoscenti.

Music media

But there's a broader issue for the industry here. In constructing communities of consumers (and using that sense of community to make a star or record appealing in the first place) record companies depend on media that they don't control. Teenybop culture is shaped by magazines like *Smash Hits* and *Top of the Pops*; indie rock culture by music papers like *Spin* and *New Musical Express*. Every musical genre has its specialist magazine – *Kerrang!* for heavy metal, *Vibe* for rap, *Muzik* for dance music – and record companies reach their markets through such magazines, rather than directly. To put this another way, record companies have rarely constructed a new music market themselves; their sales activities have meant, rather, responding, more or less quickly and efficiently, to musical taste patterns emerging from the market itself, and given meaning by music media (the most obvious example of this is the role of the American magazines, *Crawdaddy* and *Rolling Stone*, in shaping the new rock market in the United States in the late 1960s). What matters for the music industry here is not whether their records get good or bad reviews, but that their acts find a place in the appropriate music world. The first question asked of any demo tape arriving on any record executive's desk is: what sort of music is it? What the question means is: which market is it for?

The print media occupy a particular place in the history of the popular music business: they have probably had the most influence on how people understand and talk about particular genres. But they are only ever read by a very small part of the music market. Their general effect is indirect: the way in which music writers respond to a new act or sound feeds back into the way in which the record company markets them, informs the coverage of non-specialist press, radio and television, influences retail campaigns, stage performances and the broader popular music culture. In this communicative network the original argument is simplified but remains recognisable – the development of punk in the mid-1970s is the most transparent example of how a way of writing about music came to define what performers and audiences thought they were doing and so how punk was marketed. But whatever print journalists' ideological influence, particularly in the marking out of genre boundaries, the most important medium through which record sellers reach record buyers has been and is still radio.

In the early years of the twentieth century the radio and record industries were thought to be competing for consumers: they seemed to be offering alternative ways of enjoying music in the home. Why would someone with a record player and disc collection need to listen to a radio programme of music they had neither chosen nor necessarily liked? Why should someone who could tune into music for free go out and buy records for themselves? These remain valid questions, even if we take it for granted these days that the two kinds of listening go together – it is rare nowadays to find someone who only listens to the radio, or who only listens to records. Ever since the invention of the radiogram it has been assumed that domestic consumers wanted electrical goods that would allow them to choose from a range of listening options, and since the 1920s the radio and record industries have therefore had a symbiotic rather than competitive relationship: radio needed music to attract its audiences, and the cheapest source of music supply was recordings; record companies needed radioplay to reach its markets (and the rights income from radio play was itself substantial).

But while the record and radio industries thus serve each other's interests, it is not the case that their interests are identical. The audience radio stations want (whether to deliver to advertisers or as a matter of public service) is not necessarily the market record companies need, and, on the whole, it has been the record industry which has adapted to radio requirements rather than vice versa, whether we're referring to Top 40 pop formats or FM rock programming. It could be argued, I suppose, that in Britain in the 1960s pirate radio stations were developed under record industry pressure (a pressure which eventually led to the BBC launching Radio 1) but as the pirates developed their own musical ideology, so record companies had to start supplying the appropriate records, and the history of Radio Luxembourg, as a station which British record companies could use as a direct sales outlet, suggests that the more its play policy was dictated by record company sales divisions the worse its listening figures.

The point here is that radio is as concerned as other media to create a community from its listeners and uses music to that end, but it is not necessarily concerned to create a community of record buyers – the development of 'gold' stations in both the United States and the United Kingdom in the 1990s thus posed record companies a problem: gold listeners were listening precisely to hear records they already had; it became increasingly difficult for the industry to launch new acts on the radio except in the particular context of youth programming. Differences between commercial and public service radio have also been significant for music industry practice. Commercial radio is organised around demographics, the targetting of social groups of interest to advertisers, divided according to purchasing habits (by age, income, race, etc.); public service radio is organised to meet the needs of a general public. Commercial radio stations thus tend towards a coherent musical sound (boring or reassuring according to taste); public service radio stations to variety (with specialist programmes defined by reference to musical rather than demographic differences). Persuading commercial or public service radio programmers to take a record involves different kinds of arguments and, in the end, different kinds of record making policy. This is one reason why since the heyday of British rock in the early 1970s, the transatlantic traffic in popular music has been surprisingly light – in 1999 there was no British record among the United States's one hundred best selling singles; the sounds of the two countries' pop radio stations are quite different.

Whatever the broadcasting principle, whatever the musical format, the central figure in music radio is the deejay. It isn't music alone that draws together a listening community, but music plus person presenting that music and so, through a tone of voice and use of language, presenting a sense of belonging. And from a record company perspective deejays are, whatever their style, salesmen. The very fact of playing a record on a show is to endorse it, and most of the time radio deejays do more than just play it – they also are its boosters. It is rare indeed – perhaps only on the BBC chart show when the tracks played are chosen by record buyers rather than programme producers, that a deejay will play a record and deride it on air. And, more generally, the radio deejay's role – as representative cum salesman – can be used to describe the promotional role of club deejays too.

Television works in different ways. Television is the medium with the best musical reach – its audiences are bigger than radio's and were, traditionally, designed to cross a variety of musical tastes – and it has a greater audience impact, partly because television, even more than radio, offers audiences events, the sense of being there while the music happens, partly because star-building needs people to see performers as well as hear them. Television was thus the key to the process in which Elvis Presley became a national American star, the Beatles and the Rolling Stones British cultural phenomena, and even now an appearance on *Top of the Pops* or *The Lottery Show* is probably worth more in promotional terms than rotation on Radio 1's A playlist. Until the 1980s, though, and the development of specialist music channels like MTV, television mostly lacked the radio sense of commitment: on television it certainly is possible to present an act and mock it – this was Elvis Presley's initial treatment on national US television shows.

Television can take on some of radio's clubby role, and ape the radio format of music plus presenter, but only in programmes aimed at a specific audience segment. In British and North American television the only audience segment that has really been significant in these terms has been young people. Children's television has been the key to commercial success in the teenpop market, from the Monkees and Osmonds to Take That and S Club 7, and the television shows that have been most important for the music industry – *Oh Boy!, Ready Steady Go, Whistle Test* and *The Tube* in Britain, *American Bandstand* and *Soul Train* in the United States – have, in television terms, had small audiences. And even these shows were shaped by television's sense of its audience rather than by record company understanding of its markets. The emphasis was on offering viewers access to a seeming live event, whether in a youth club, dance hall or disco. The stars these shows helped to create were thus as much defined by their ability to stand out in a television studio as by their ability to build a record selling career. It was only with the invention of MTV that a form of music television emerged that could be treated like music radio.

Perhaps surprisingly, the cinema has probably had more effect on the sales of specific records than television. In pop terms, films are primarily significant as star vehicles which can be kept under greater promotional control than television shows and which have a greater global reach – for much of his career Elvis Presley used only films to promote his records. British stars, from Cliff Richard to All Saints, have all felt the need to make a film at some stage in their careers and while most of these have had little cinematic impact, the Beatles' *Hard Day's Night* undoubtedly moved their career up a notch, particularly in international terms. But from the beginning of sound cinema films' most important feature for the industry was their ability to get a song into people's heads, whether in musicals (throughout the mid-sixties the Beatles were competing for the top chart spot with the soundtrack of *The Sound of Music*) or, following the success of Henry Mancini's 'Moon River' (from *Breakfast at Tiffany's*) as a number over the opening or closing credits.

Film soundtracks are still the most significant source of best selling singles in the United States and the film/music industries now have their own symbiotic relationships: films are created and produced as a joint film/record company venture, like *Saturday Night Fever* or *Dirty Dancing*; they feature already existing album cuts chosen following elaborate cross-company negotiations. Either way the film promotes both its soundtrack and individual songs on it; the soundtrack album (which may have only a passing resemblance to what is actually heard in the cinema) promotes the film; and a video clip can be used to promote film and music simultaneously.

Gatekeepers and networks

The music media were once thought of as 'gatekeepers'. The image was of a record being released (an act having already got through the gates of the record company) which then, to be successful, had to be approved by various arbiters: music paper writers, radio programmers, television producers, club deejays, concert promoters, record retailers, etc. Each of these people had the power to stop a release getting to the market place; a record that is neither seen nor heard might as well not have been released in the first place. The question then becomes how the gate keepers can be persuaded to let a record through (one answer has been financial inducement or payola); the problem is that their reason for choosing a track – that it is appropriate for a readership or a playlist or a show – does not necessarily rest on the same sort of market assessments that are made by record companies.

Nowadays, though, this model is misleading. Records do still reach the public by passing through a media network, but there is no longer that constant sense of banging against blockages. Fewer records are released these days without the record company ensuring that the gates are open in advance: marketing and promotional strategy can be decided before an act is even signed; indeed, the ability to formulate such a strategy becomes one reason for making a signing. From this perspective one could say that records are, in effect, made for the media rather than the public or rather, perhaps, that they are made for the public as defined by the media. The model of film promotion – songs composed for a soundtrack; soundtrack compiled for a record – can be applied more extensively. A new boy band is put together as a television show and *Smash Hits* spread before a record is released; an indie band is signed because the company hears it as right for the Steve Lamacq or Jo Whiley shows, can see the band's videos on MTV rotation; a dance record is made to deejay order and a company like Ministry of Sound uses its club to sell its records, its records to sell its club and its magazine to sell both. Branding (and a star name is essentially a brand) is by its nature a multimedia strategy, and this kind of networking, which describes a commercial music culture in which success depends on the coordinated circulation of value, has probably always been a more accurate description of the relationships involved (in terms of trusting other people's judgements, for example) than the conflict implied in the gatekeeper model. The gatekeeper image was itself a sales pitch: it contributed to the rock ideology of triumphant artists and their fans storming through the conservative commercialism of the suits.

That said, it is still true that the music industry is particularly dependent commercially on media it doesn't itself control. Even if it is involved formally (through the corporate ownership of a cable service, for example) there remain differences of economic interest and with the exception of film/music tie-ups there are few examples of record companies successfully exploiting their ownership of a television network or magazine publisher. Corporate control of star-making machinery and the album sales pitch involve different institutions.

First, advertising. By and large record advertising is effective only for established stars. Television adverts are for hit packages and artist 'best of' collections; posters give news of the latest superstar release. New acts can't be sold effectively this way; airplay of a new album is a much better way of exciting listener interest than an advertisement for it, whether on radio or television. This comes back to the point that to sell, an act or record has to take its place in a musical culture and, culturally, the advertising voice just sounds wrong. This situation was changed to some extent by MTV, which can be considered as music radio on television, with playlists, charts, veejays, etc. The video clip itself is hybrid. It only exists to promote a record (and to fill out a star image) but it is not an advert for it. What it offers, rather, is a new kind of experience of a record (videos often work to explain what lyrics mean, for example); the aim is still to persuade people to buy the disc (and not the video itself). The advantage of the video from the record company point of view is that it makes the clips itself and can thus control the ways acts are presented; but to work effectively videos are dependent on MTV's decisions – not just the decision to show or rotate a clip in the first place, but decisions about flow and genre and presentation. Repeated video viewing becomes tedious much more quickly than repeated record listening, and continued interest in a clip depends on its interest as television, in the context of a video flow, as framed in different ways by different veejays.

There is an additional promotional issue here. Video production is very expensive (compared to poster or magazine advertising, for example) and to justify such costs marketing departments need to be sure a clip will be widely shown, either because the record is a guaranteed seller (i.e. made by an established star) or because the clip is likely to cross national boundaries, to do its promotional work on MTV and other music programmes in a variety of countries. In promotional terms, then, the good video is the video that can be fitted into a great variety of television contexts, and this is to bring a new sort of constraint to record selling: the major labels rarely sign acts these days without reference to their potential international appeal.

The other form of promotion over which record companies can exercise some control is live performance. Concert tours are planned (and often funded) by record companies to sell an album; promoters have become, in effect, the fee-paid providers of a professional service. Live tours are important promotionally not just because in concert a group can seal its own image, as it were, but also because the concert (rather than record release) becomes the event which focuses all other promotional activity at a local level – the radio play, retail display, press coverage, merchandising, and so forth. Except for the biggest stars, though, live performance is a loss-making activity and dependent on a ever decreasing network of suitable venues. One consequence in the last decade, at least for rock, has been the rising importance of the annual festival, a two or three-day event at which dozens of bands play. Festivals are a cost effective way of staging live music – promoters and audiences both benefit from the economies of scale; they are equally useful for superstars and new acts; they have become settings for the enactment of genre communities that are the key to the record selling process in the first place. The rise of the festival means a return of the package tour which dominated the British pop scene till the end of the 1960s, but overlaid now with a Woodstock vibe, a rave sensibility, a general New Ageism.

The record industry

The rock festival can be taken to stand symbolically for the state of the contemporary music industry. Here we have a gathering of fans and musicians hoping for the unexpected, and the proximate threat of drugs and drink and anarchy, but all, in fact, tightly controlled. Festivals depend on interminable negotiations as to who will appear where and in what size type on the posters, who will perform when and for how long on which stage; on detailed arrangements with local fire and police services; on carefully calculated logistics of sewage, food and first aid. The only real threat of chaos is the weather. The festival is symbolic, then, because the industry is also essentially concerned with the rational organisation of irrational forces – talent, taste – while celebrating itself as buccaneering.

Mike Jones has suggested that we can understand the music industry better if we regard it as more about the production of failure than success (Jones 1998). He's not only referring here to the statistic I've already mentioned: if ten out of eleven issued records fail to cover their costs then clearly the industry is devoting a lot of its time to fruitless projects, whatever the compensating cash flow from the hits. Jones is also drawing attention to management strategies and to a management culture that reflect a sense of fatalism. To begin with, although the industry presents itself in risk-taking terms, and it's true that every release is a kind of gamble, in day-to-day practice what this means is a strategy of risk avoidance. To be profitable a company has to maximise the returns on a would-be winner, minimise the losses on a likely loser – hence the charts as the central form of market research and the importance of size as the best hedge against misjudgement (small companies can't carry so many losses and so, paradoxically, often find it harder to cut and run from a project that clearly isn't working). One effect of the resulting system of portfolio management (companies put out a range of products to ensure they've always got something that can profit from market trends) is that different acts signed to the same label can be treated in quite different ways, partly because the genre divisions of companies are run and budgeted differently, but partly because a continuous assessment is being made of an act's potential value, and this can change regardless of how they are developing musically. I'll come back to this.

The second point I want to take from industry analysts like Jones and Negus is that built into the record industry is what we might call a culture of blame. To begin with a project's failure can be blamed either on the fickleness of public taste or on the obduracy and/or self-indulgence of the artists, but, as Keith Negus has shown, such blame is also turned inward (Negus 1992). The record industry involves in practice the collaboration of two groups of employees: the A&R (Artists and Repertoire) department, which works with the talent (signing acts up, developing their potential, taking charge of the process in which they produce something for the market) and Marketing, which takes that something and tries to sell it. These departments have equal status both in budgetary terms (promotion and production costs are similar) and as decision makers (marketing executives are centrally involved in the discussions of what acts to sign and what then to do with them). When a project is successful these departments will both take credit (I've always been struck at the Mercury Music Prize awards ceremony by the way in which record company A&R and marketing executives will modestly accept applause for a record's success, as if was all their own work). When a record fails, though, it is routine for one department to blame the other. How can we be expected to sell such crap? asks a marketing team (putting the blame on the musicians and on A&R, the people meant to be looking after them). Why didn't you do a proper sales job? responds A&R (putting the blame on the public and on marketing, the people meant to be looking after it). It's all the fault of the producer, the protagonists then agree – the producer, as the person employed to turn an act's sales potential into a marketable product, is usually not a company employee and so a useful scapegoat.

Negus points out that the tension between A&R and marketing often reflects social differences. When he was doing his British research, in the 1980s, A&R was dominated by male rock fans, committed to a long-term strategy of talent building. Marketing departments were more likely to be staffed by female pop fans interested in image building and with a necessarily shorter term outlook – their job was to sell what was to hand. But I want to emphasise a different point. The underlying assumption here among both groups, is that a record company is indeed pursuing success but is thwarted, either by musicians (and producers) not delivering the right product or by the public not responding, often because of factors beyond a company's control (competition from other records or other media; the unpredictable rise and fall of fads and fashions). But what if the problem is that record companies aren't really pursuing success at all? What if a record's failure reflects not the irrational activities of musicians and consumers but the perfectly rational activities of record companies themselves? These are Mike Jones' questions.

The significant decision here is when record companies decide not to release a record in which they have already invested a considerable sum. This is not an uncommon experience for unknown acts (particularly if you include here the decision to release a record but give it no promotion; it might as well not be released). Why would a company do this? The answer lies less in a changing judgement of potential markets (if this was the issue then at least some sort of market testing would be budgeted) than in broader issues of company policy: the development of the portfolio management structure; the carefully orchestrated programme of global release and promotion; the calculation of what budgets are available for what products when; a sense at any one moment of to which project it makes most sense to devote energy. A would-be new release may arrive in the system and simply have no place for reasons which have nothing to do with its musical or market appeal at all.

Jones, writing from his experience of being a member of a relatively successful rock group, Latin Quarter, suggests that there are a number of reasons why record companies decide to make an act they've signed a failure. As they become increasingly involved in the business of selling music to the media, so shifting media demands change record company assessments of the value of their various acts, and this is tied into the pursuit of global strategies. The policy decisions of national or regional divisions of global record companies (and acts are usually signed through local or regional divisions) are themselves subject to the effects of internal competition between different divisions and to edicts on release policy from on high. There is some evidence, for example, that the accounting structures of large corporate companies like Universal are leading to much shorter-term profit taking than used to be the case for the larger independent companies like Island, now a part of the Universal portfolio. At the same time the organisation of companies into genre divisions can also mean that acts are marginalised as genres mutate. Record companies have always competed with each other by providing the same sort of product rather than by investing in something completely different; in genre terms, the success of another label's acts (Garth Brooks, Chemical Brothers, Steps) can have an instant effect on the evaluation of a label's existing talent.

One result of this is the shifting role of the artist manager, from impresario (hustling and hyping an act come what may) to bureaucrat (taking part in company strategy meetings, keeping the boys in line). Jones recalls that Latin Quarter's manager, who went on to manage Oasis, shifted by default from representing the band's interests to the company to representing the company's views to the band; he became privy to record company thinking that he judged best to keep from the band itself. These days managers provide professional services to record companies and acts alike (a common condition in the signing of new acts is that they get professional management, as recommended by the record company), and have their own professional association, the International Managers Forum. The surviving mythology of ogres and obsessives like Colonel Parker and Albert Grossman, Brian Epstein and Andrew Loog Oldham is just that, mythology.

Conclusion: the music business in the twenty-first century

Once upon a time (up to the end of the 1970s, anyway), the large record company strategy for dealing with risk was to make sure that whatever money was made out of music, it would have a cut, from the moment a teenager first bought a guitar till the moment he was remembered in a tribute show on television. A company like EMI thus bought its way into the musical instrument business, the publishing business, the concert hall and disco business, the retail business, the magazine business, etc. As for record production itself, as many of the support services as possible were provided in house – the studio and engineers and producer, the packaging and sleeve designer and photographer, the plugging and PR teams. But the down turn in the United States record business at the end of the 1970s and the resulting shake out of staff in all departments led to a rethink, and for the last twenty years the corporate strategy for avoiding risk has been to ensure that the necessary gambles are taken by other people.

Although it's not usually thought of in this way, the biggest financial burden in the development of new talent is carried by the musicians themselves. Most musicians develop their skills for years at their own expense, and even when they first go commercial (playing gigs, recording tracks) it is usually at a loss. And whereas a major record company used then to sign up an act for its first release, these days even this process happens out of house: independent producers and record labels have become, in effect, the major labels' research and development departments, developing new acts and markets until they and/or their artists have had enough sales impact to justify a major company getting involved. At the same time, the riskier bits of the music business (the provision of studio services, for example) are now also mostly run by independents; bespoke services (PR and radio plugging and sleeve design, for example) can be bought release by release, according to ever-changing sales strategies and budgetary constraints.

The result of all this is an industry which has as its core the ownership of rights (the major music corporations thus combine record companies and music publishers) and musical distribution (the major music corporations – Universal, BMG, EMI, Sony, Warner – are part of entertainment super-corporations which are seeking to benefit from all the ways in which music can now be carried globally – sheet music, CDs, cable and satellite television, the cinema, the Internet). Content creation, talent spotting, mapping new markets, are left to independent operators, independent financially but bound to the majors in deep laid networks of trust and reputation. This is the context in which fear of the future because of its threat to the owners of rights is balanced by excitement about the commercial possibilities of the new technologies of digital distribution (as suggested by the merger of Time Warner and AOL). On the one hand, devices like MP3 and software like Napster open up the nightmare vision of a global network of home tapers, able to transmit perfect copies of every CD ever made across telephone lines with no obvious legal or material obstacles;

on the other hand, direct downloading from record company to domestic consumer gives rights holders the opportunity to benefit from every home play of a track, and not just from its initial sales.

It is always rash to predict the future, especially in a music industry in which technology has rarely had its expected effects, but it does seem safe to suggest that digital technology and the convergence of the entertainment, telecommunications and IT sectors won't so much transform one sort of music industry into another as accelerate a process in which different music industries are developing alongside each other, sometimes overlapping in their concerns and personnel; sometimes not. My own prediction is that we will see the development of at least three such parallel music worlds. First, the mainstream pop/rock business, which will continue to market established global stars like Céline Dion and Whitney Houston, to invest in would-be global stars like Robbie Williams and Ricky Martin, using all other music media in their sales campaigns. This sector will still depend on cross-counter mass-market retailers like Woolworths and Walmart even while developing on-line access, and selling music to the public will be increasingly tangled up with processes in which music is used to sell all sorts of other services and entertainment too. Second, an essentially chaotic illegal business, involving at one extreme straightforward crooks ripping off rights holders by bootlegging; at another extreme experimental and political artists, refusing to accept the constraints of copyright law in their use of 'found' sounds and images; and in between the usual variety of pirate broadcasters, illicit club and party organisers, home digital distributors, fast turnover deejay suppliers, and so forth. Third, genre music scenes, local players connected through Web sites and digital radio, but semi-commercial, making enough money to go on making music but not seeking to move up a ladder of ever increasing success.

This description of the future is, of course, simply an extrapolation from the past. From the moment the first music copyright act was passed there was an illegal music sector and, as I suggested at the beginning of this chapter, the commercial music industry has always been underpinned by a rich variety of amateur activity. What I am suggesting now, though, is that in the future the distinctions between these worlds are likely to become firmer, movement from one to another more difficult. Rock, as a particular form of popular music, was marked by the way it occupied all these musical worlds: it achieved new levels of global commercial success while exploiting both ideologically and materially the illegal sector, defining itself unabashedly as an anti-commercial commercial sector. It depended for a flow of musical talent from local music scenes into the professional mainstream and back again. What is not clear now is whether this sort of institutional confusion can survive in the world of digital distribution, digital disintermediation. The question most often asked presently is how will the music industry survive the sales of MP3, Napster, and all the other technological threats to its power and profits? But the more interesting question concerns musical culture itself: what is it going to mean to be a digital musician?

Further reading

Literature on the music business tends to go out of date (and out of print) more quickly than most other academic studies and so the books listed here should be read alongside the latest issues of trade papers like *Music Week* and *Billboard* and the academic journal *Popular Music.* A surprising amount can also be learned about music business practices from pop biographies, particularly if the stars involved (like George Michael or the Stone Roses) have been involved in contractual disputes. The most accessible sources of hard data are the various music industry enquiries carried out by the Monopolies and Mergers Commission. Otherwise, for the history of the music business in the United States see Russell and David Sanjek: *The American Popular Music Business in the 20th Century* (New York: Oxford University Press, 1991). The best account of the British music business is still Keith Negus's *Producing Pop* (London: Edward Arnold, 1992). Negus's *Music Genres and Corporate Cultures* (London: Routledge, 1999) is a good account of the international organisation of record companies, though likely to date quickly. Roger Wallis and Krister Malm's *Big Sounds from Small Peoples* (London: Constable, 1984) remains a remarkably visionary book about globalisation, even sixteen years on. Musical rights are explained in Simon Frith ed., *Music and Copyright* (Edinburgh: Edinburgh University Press, 1993) – the details of legal and technological dispute have changed, but not the underlying moral issues and principles. The most incisive analysis of the impact of technology is Paul Théberge, *Any Sound You Can Imagine. Making Music/Consuming Technology* (Hanover, NH: Wesleyan University Press, 1997). For an influential sociological study of the dance/club scene see Sarah Thornton, *Club Culture. Music, Media and Subcultural Capital* (Cambridge: Polity, 1995). There are no good up-to-date books on either the music press or music radio, although Simon Garfield's *The Nation's Favourite* (London: Faber, 1999) does provide dismaying insight into the peculiarities of Britain's youth pop service, BBC Radio 1. Andrew Goodwin's *Dancing in the Distraction Factory* (London: Routledge, 1993) is an exemplary study of MTV in the United States. For MTV Europe see Lida Hujik's admirable PhD thesis, 'MTV Europe', Department of Media and Communications, Goldsmiths College, 1999. Besides Mike Jones' doctoral dissertation cited above, the best recent studies of the music industry from below, as it were, are Mavis Bayton's *Frock Rock* (Oxford University Press: 1998), Jason Toynbee's *Making Popular Music* (London: Arnold, 2000)and Andrew Bennett's *Popular Music and Youth Culture* (London: Macmillan, 2000). Finally, Simon Frith and Andrew Goodwin eds., *On Record. Rock, Pop and the Written Word* (New York: Pantheon, 1990), a collection of key essays in the development of popular music studies, includes a section on the music industry. These were the articles that influenced my and many other people's approach.