2. Back in black: rethinking core competencies of the recorded music industry

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INTRODUCTION

Thom Yorke, lead singer of the band Radiohead, made international news when, in a June 2010 interview, he declared the recorded music industry to be dying, calling it a 'sinking ship', predicting that it will be 'months rather than years before the music business establishment completely folds' (cited in Ross 2010). Yorke is not alone in his point of view, as popular media, industry pundits, academics and even consumers have, for years, been documenting the various ways in which the recorded music industry in general and the major labels in particular have been in a state of freefall, moving inevitably towards presumed obsolescence.

Yet four years later, the recorded music ship still hasn't sunk. But is Yorke correct in stating that it's only a matter of time before record labels, particularly major labels, disappear? In one sense, statistics for what we typically conceive of as the 'recorded music sector' bear out his prediction, with the International Federation of the Phonographic Industry (IFPI) reporting that in 2013 the US recorded music sector was valued at $4.47 billion, or about 31 per cent of what it was worth at its $14.5 (US) billion peak in 1999 (Gordon 2011, p. xxvi) – certainly not an optimistic indication. My aim is to question whether the death of the recorded music industry, like Mark Twain's, has been greatly exaggerated. Provisional findings from research I'm undertaking at the time of writing suggest that recorded music is not in fact dying but instead undergoing a transformational process, rethinking its core competencies and developing strategic partnerships throughout the music and creative industries, moving away from a model based almost exclusively on consumer sales and towards one based on a range of business-to-business partnerships across the creative industries.

The rise and fall of Napster and the subsequent digital watershed of the late 1990s has been so prominent in research into recorded music's perceived reversal of fortune that it has tended to obscure equally significant developments within the sector at around the same time. One such development particularly germane to this research are two substantial artist-label disputes: the first between Prince and Warner Brothers from 1992–96 and the second between George Michael and Sony in 1994. In the early 1990s, Prince's artistic output was prolific but not especially commercial, with rapid and subsequent releases each selling more poorly than the previous. As both costs and tensions escalated, blame was apportioned on both sides, culminating with the Artist Now Formerly Known As Prince changing his name to an unpronounceable symbol and making a number of public appearances with the word 'slave' written across his cheek, declaring to *Rolling Stone* magazine that 'if you don't own your masters your master owns you' (cited in Grow 2014).[1]

Even more significantly, in 1994, George Michael brought a suit against Sony Music, claiming the terms extending his recording contract were so onerous that they amounted to a restraint of trade. While his case was built on a number of points, the key issues surrounded the limitations and duration of the contract, which, if all options were taken up by Sony, would last 20 years – effectively the whole of his career. Like Prince, by the time of the lawsuit, Michael's album sales were in precipitous decline. Growing increasingly frustrated by the fact that Sony had contractual control over all creative aspects of his recordings, and was refusing to release anything they did not feel had the same kind of commercial potential as his earlier chart hits, Michael sued, claiming the terms of his contract were so restrictive it amounted to, in borrowing a phrase from Prince, 'professional slavery' (cited in NYTimes.com 1994). Ultimately, Michael's case was unsuccessful. But had he won, it would have set a dangerous precedent for every artist or act unhappy with its deal to compel its label back to the bargaining table to renegotiate the terms of its contract, a move that could have financially crippled if not outrightly bankrupted many labels. Despite the fact that neither Michael nor Prince were successful in their disputes, when read together, both instances succeeded in shining a very public light into the previously nebulous and murky world of major label recording contracts, pressurizing labels, especially major labels, into undertaking more 'humane' contracts with artists and conducting contract negotiations in a more transparent fashion.

One of the first and most visible outcomes of these newly 'warm and fuzzy' major label dealings was the 2002 agreement between Robbie

Williams and EMI – the first significant example of what has come to be known as a 360 degree deal, where major labels earn a percentage of many of the artist's income streams, not just album sales. While considered a significant step forward from traditional recording contracts at the time, 360 degree deals are today not seen as especially artist-friendly. But for the purposes of this research, 360 degree deals are central to understanding how and why the recorded music sector has not collapsed but instead reconfigured itself into a more diverse and ultimately more robust industry.

BEYOND 360 DEGREES

Most obviously, 360 degree deals have been a way for labels to mitigate at least some of the impact of online piracy and the steep decline in album sales. But at the same time, 360 degree deals also represent a kind of industrial rearticulation – an opportunity for movement away from a business model almost exclusively driven by consumer album (and singles) sales towards a model where opportunities to exploit recorded music are now just part and parcel of a multi-income stream model, inclusive of arenas like publishing, management, merchandising, licensing and sponsorship. Under the 360 degree model, labels aren't just 'silent partners' but instead active owners or at least part-owners with influence over how each element within an act's career is developed. In essence then, 360 degree deals effectively place the artist and the label in a kind of de facto joint venture where it is the act, or indeed the brand, that is at its heart.

The idea of seeing income from not just one aspect of an artist's career but from all of them has proved an alluring one, causing the once very evident lines separating music industries specialisms to grow increasingly blurry. Seeking to enjoy the same kinds of multi-channel revenue streams as labels, music companies with no former experience in recorded music have begun to use 360 degree deals as vehicles for securing their own agreements with global superstars. Most notable in this regard is perhaps Live Nation, the US-based concert promotion corporation. From the mid 2000s forward, the company first expanded its reach from what was exclusively live music into the recorded music sector, successfully luring global acts like U2, Madonna, Nickelback and Jay-Z away from deals with traditional record labels into 360 degree deals with the promise of helping acts establish themselves as entertainment brands. For example, in its $150 million deal with Jay-Z in 2008, Live Nation began to see income from all of the hip-hop star's

entrepreneurial ventures: his record label, Roc-A-Fella, Roc-A-Wear, his clothing line, 40-40, his chain of nightclubs, as well as concerts, merchandise and recordings (Kaufman 2008).

Building on what has proved to be an extremely profitable first step of bundling rights in recorded music, live performance and merchandising, Live Nation has since sought to develop an even greater level of integration between itself and its top-tier artists. In 2013, the company entered into buyout negotiations with both Principle Management and Maverick, the management teams behind U2 and Madonna, respectively, to form a new joint venture under Live Nation's artist management division, Artist Nation, which already looked after several hundred other acts including Miley Cyrus and Kings of Leon (Gibsone 2013). In 2011, U2's '360' tour broke all previous records for the most profitable tour ever, selling more than $700 million in tickets (Suddath 2013). Similarly, Madonna was named top-selling live act of 2012, netting more than $305 million in live music revenue (Suddath 2013). Thus, keeping artist management in-house (and thereby retaining the 15–20 per cent of income that is typically earned by artist managers) can be seen as a strategic move to more efficiently maximize profit levels (Suddath 2013).

In one sense, then, in the most pessimistic terms, the value of recorded music today can be seen as merely an incidental conduit to more lucrative income streams: as a kind of loss-leader for what are, at least at present, more profitable ventures like live performance and merchandising. More optimistically, however, the recorded music sector can be seen as transforming its primary purpose from what was once a tightly held oligopoly controlled by just a handful of labels to a kind of creative industries facilitator, or hub, from which a constantly evolving range of new opportunities to exploit recorded music emanate. It is an idea in line with that of Marshall (2012, p. 83) who has argued that, 'At least on the surface, the major labels have rethought their mission statements completely in the last few years. Indeed, while much has been written about the impending decline of the recording industry … [we can] assert confidently that the record industry already no longer exists; in its place stands the global music entertainment partner industry.' In this conception of the recorded music sector, primary emphasis is no longer on consumer-side album sales but instead on developing business-to-business creative industries partnerships. This notion of the recorded music sector as a creative industries hub can be evidenced along two parallel strands: that of outgoing and incoming investment.

By outgoing investment I make reference to the ways in which recording companies and other sector stakeholders are developing an ever-increasing range of opportunities to place music within television

programmes, films, adverts, theatrical shows, video games and even sporting events. While these kinds of placements and syncs are certainly nothing new, it is the increased level of integration between music and other creative outputs that is of significance, both culturally and economically. For instance, in 2012, the Beatles' management company, Apple, and Matthew Weiner, executive producer of the television programme *Mad Men*, worked together to produce an episode titled, 'Lady Lazarus', which featured a rare sync licence for the original master recording of the Beatles' track 'Tomorrow Never Knows'. Weiner, who had been unsuccessful in several previous attempts to secure the rights to a Beatles recording for the show, remarked that to win approval this time he had to 'do a couple things that I don't like doing, which is share my story line and share my pages'. He added that, 'It was hard, because I had to, writing-wise, commit to the story that I thought was worthy of this incredible opportunity.' When asked what he would have done if Apple Corps had once again said no, Weiner stated, 'I don't know. I would have changed the story' (cited in Itzkoff and Sisario 2012).

Lionsgate, the production company for *Mad Men*, paid Apple and EMI $250 000 for use of just over 100 seconds of the song, an expensive, but not disproportionately expensive, fee. But beyond financial value, the real value of the song's placement in the episode is derived from the mutually beneficial arrangement for both the TV programme and the act and label. By obtaining such a rare sync licence *Mad Men* further enhanced its reputation as high-quality programming, carefully weaving the Beatles' song into the episode's plot. For the Beatles, Apple and EMI, aside from the obvious financial gain, the placement of 'Tomorrow Never Knows' introduced or reintroduced the song to an audience of over 2 million people, once again putting the Beatles and their music at the fore of popular culture, even if temporarily.

Far from a one-off example, the final episode of *The Sopranos* featured a similar montage using Journey's ubiquitous hit 'Don't Stop Believin''; TV series like *Moone Boy*, *True Detective* and *Girls* all integrate recorded music with narrative in a way similar to *Mad Men*. Beyond television, recorded music is also central to the success of other creative media. *Grand Theft Auto 5*, on course to be the top-selling entertainment product of 2013, licensed 240 songs for the game (Chiappini 2013), not to mention the centrality of recorded music to music-based games like *Guitar Hero*, *Rock Band* and *Dance Dance Revolution*. Thus, by refocusing from consumer album sales to business-to-business (B2B) strategic partnerships across the creative industries, record labels and associated stakeholders have not only managed to find new avenues in which to

successfully sell recorded music directly but also and more significantly indirectly, by integrating it with other creative products.

Another particularly notable instance of this kind of creative-industrial integration impacting the production, consumption and distribution of recorded music is Artwerk Music, a joint venture between Electronic Arts (a video game publisher) and Nettwerk Music Group (itself a Live Nation-esque hybrid of label, publisher and management company). Steve Schnur, Worldwide Executive of Music for Electronic Arts, has described Artwerk as:

> Not a record label, but rather an aggressively proactive publisher that delivers master recordings, film & TV sync deals, advertising placement and distribution that goes far beyond games. We look at publishing as our responsibility to create marketing opportunities for the bands we sign, and in only its first few months, the Artwerk roster is everything a label should be – diversified, ferociously independent … and growing. (Schnur 2008)

The Artwerk model is worth exploring for two significant reasons. First, by self-defining as 'not a label', the venture underscores the ongoing dominance of the 360 degree model within the music and creative industries. Where Live Nation developed a hybrid model managing income streams from live and recorded music, Schnur has taken this notion a step further, seeking to create a means of integrating the value of recorded music with completely different forms of popular entertainment: video games, film and television amongst them. Second, unlike traditional record labels that market music products direct to consumers (B2C), Artwerk is a B2B company. Its purpose is not in looking to produce a top-selling album, high-grossing tour or sold-out musical, but rather to create 'an emotional connection with the listener', which in turn drives 'product desire' (Schnur 2008). Or, as Schnur himself has succinctly phrased it: 'today's new paradigm is no longer about music *getting* a piece of the action, but about music *being* a piece of the action itself' (Schnur 2008, emphases in original).

FROM MUSIC PRODUCT TO CULTURAL BRAND

The value of recorded music as a catalyst in cultural branding has not remained a realization exclusive to the music industries. Just as Live Nation expanded its expertise from one sector of the music industries to others, and just as Artwerk integrated music with other forms of popular entertainment, companies whose core products are entirely outside the

music industries have, similarly, begun to develop and expand competencies in recorded music in a similar desire to create holistic 'lifestyle brands'. Where companies were once happy to simply sponsor music products and events, an increasing number are now moving a step further, and actually producing recorded music themselves, as a corollary to their core products.

One obvious example of this kind of inward movement into recorded music is Red Bull Records, an independent label created in 2007 by energy drinks company Red Bull. More than a promotional gimmick, Red Bull Records is a full-service independent label with nine acts currently signed, most notably Glasgow's Twin Atlantic. Around the same time, coffee company Starbucks launched its own recorded music label, Hear Music, whose roster has boasted a series of surprisingly high-profile signings including Joni Mitchell, Elvis Costello, Carly Simon, Carole King and Paul McCartney, who has now released his last five solo albums in the United States on the Hear Music label. When considering why firms outside the music industries would willingly enter into a business sector whose fortunes are, seemingly, in steep decline, the answer seems to lay in understanding the value of music in galvanizing consumer perception of an overall product brand. Red Bull's website states that 'Music is a way of life at Red Bull Media House … It is the unforgettable backdrop and intuitive emotional understanding of our brand's activities and content productions' (Red Bull Media House 2014). Similarly, the Concord Music Group, who undertook Hear Music as a joint venture with Starbucks, note that 'Hear Music advocates creative control for artists and encourages musicians to stretch and take risks, which the new label believes will result in compelling music choices for consumers' (Concord Music Group 2014).

In another example, in 2011, shoe manufacturer Converse launched Rubber Tracks, a professional community-based recording studio in Brooklyn, New York, where local musicians can apply for up to two days of free studio time. While acts have the option to grant Converse limited licensing of their music for online and social media promotion, all rights remain with the act (Converse 2011). The scheme has proved so successful further Rubber Tracks studios have opened in cities across North America, including Boston, Los Angeles, San Francisco and Toronto. On first glance, free studio recording time might appear as little more than a cynical ploy to promote the Converse brand to young people squarely within the company's prime demographic. But in building a state-of-the-art studio in the heart of Brooklyn's music-centric Williamsburg neighbourhood, Converse's aim is to become fully integrated within

the local community, and by extension, to engender goodwill amongst the hundreds of musicians and music fans in the area (Jurgensen 2011).

Unsurprisingly then, musicians at all levels of experience are similarly beginning to understand the boundaries of the 'music industries' and the 'creative industries' in vastly different ways to the traditional, segregated model of recording, publishing and management that was in existence for nearly a century. In the same ways companies like Red Bull and Converse are seeking to attract musicians to help bolster their brands, an increasing number of both established and aspirant pop musicians have begun to seek out a wide range of opportunities across many of the creative industries in which to promote their music. Where once the notion of 'selling out' separated the work (and beliefs) of commercial songwriters and 'popular' musicians, today there is seemingly very little resistance to commercial exploitation of original popular compositions beyond the album, single or live performance. And by extension, media like video games and television adverts are becoming legitimate ways of promoting music to national and sometimes even global audiences, in a kind of twenty-first century reboot of Tin Pan Alley practice, where the line between marketer, businessperson and musician has been growing increasingly blurred.

For instance, in 2013, marketing firm The Martin Agency created the 'Wonderfilled' ad campaign for Oreo cookies, recruiting top pop acts including Kasey Musgraves and Owl City as performers. Where in 1992, comedian Bill Hicks famously said, 'You do a commercial, you're off the artistic roll call forever', no such attitude seems prevalent today (cited in Allen 2014). This sea-change in disposition towards marketing is reflected in the convergence of the music and wider creative industries. Specifically, as 360 degree deals compel musicians to develop as many revenue streams as possible, the idea of 'selling out' has also, in large part, been mitigated by an evolving and more sophisticated sense of brand awareness both on the part of marketers and consumers. David Muhlenfeld, a creative director at The Martin Agency, has commented that 'A brand song is just like any good pop song … Whether you're talking about a broken heart or a cookie that makes people happy, if it feels true and you write it from that perspective, on some level, you can't reject it … It doesn't feel dishonest. It doesn't feel cynical' (cited in Beltrone 2013).

Thus, it would appear we are, today, in a new era, where the stain of 'selling out' has been largely erased. In no small part driven by the nature of 360 degree deals, many young acts now see little downside in having their music incorporated into other creative industries products and outputs if, in exchange, it helps their music reach a wider audience. For

instance, after singer-songwriter Ben Howard's track 'Oats in the Water' was aired during an episode of *The Walking Dead*, it was tagged 43 000 times on Shazam (Whittock 2013). Similarly, Tommy Wright, lead singer of Young Kato, whose song 'Something Real' was featured in an episode of *Made in Chelsea*, commented that when the show aired, the band starting trending worldwide on Twitter, 'at one stage creeping up on Justin Bieber'. He added that 'As well as having a huge following [*Made in Chelsea*] is a show which prides itself on featuring some of the best new music so from that point of view it was great to be asked … But for us the main thing was about having the chance to bring in new fans' (cited in Gloucester Citizen 2013).

It is an attitude that is reflected by more mature and established artists as well, many of whom have had to adjust both business and creative practices in order to (attempt to) remain culturally relevant to these kinds of shifts in consumer attitudes and perceptions within contemporary popular culture. In September 2014, Paul McCartney released a press statement announcing his involvement with *Destiny*, a high-profile online video game published by Activision and Bungie, tipped to be one of the biggest computer game releases of the year:

> The hype surrounding this release demonstrates how the interactive entertainment industry is overtaking Hollywood. The continuing success of this market and the scale of *Destiny* is further underlined by the fact Paul McCartney has written the game's end title theme song *Hope*, as well as working on the soundtrack. Throughout his career Paul has always looked at ways to reach new audiences with his music and has never been afraid to try out new ideas or platforms. This is the first time that Paul has ever written for a computer game and he has likely started yet another trend for the world of popular music. (Paul McCartney Official Website 2014)

It is a statement echoed by Eric Osbourne, Bungie's Community Manager:

> There was no check involved, big or otherwise. He's in it for the creativity. He got a wonderful opportunity to reach an audience that wouldn't typically be immersed in Paul McCartney. They might hear the name – of course he's everywhere, the Queen's Diamond Jubilee, the Olympics, obviously he's touring and recording nonstop – but he sees it as a way to reach a new audience that might not otherwise hear his music. (Osbourne, cited in Brown 2014)

Thus, it becomes clear that exploiting opportunities beyond the recorded music sector and the music industries more broadly can be a valuable exercise for both emerging and well-established acts, all of whom are

seeking to have their music heard by as wide and diverse an audience as possible. But beyond just a mutually beneficial financial and cross-promotional arrangement, the increasing centrality of recorded music as a core component within creative industries products suggests that it is not a sector on the verge of obsolescence, but instead one that is only now just beginning to realize its full potential. Where even just a decade ago a music soundtrack was ancillary to a film, television programme or video game, today producers and publishers are fully embracing the evocative, emotive power that is unique to music:

> 'It's only been quite recently, [as] advertising has been shifting more toward the genre of content, that the industry has allowed itself to use music the way normal people like to use it,' said John Mescall, executive creative director at McCann Australia … 'Indeed, the songs in this new wave of marketing music aren't the cheesy, hard-selling jingles of yore. They're narratives that take the place of voiceovers, on-screen copy or vaguely associated soundtracks licensed from cool indie bands'. (cited in Beltrone 2013)

Douglas Holt's theory of cultural branding (2004) is a useful one in thinking about ways in which the music industries and/or the creative industries have come to rethink, restructure and reproduce their core competencies. In Holt's view, one of the key contributions of modern marketing practices to popular culture has been the establishment of the cultural icons – people, places and events that 'come to represent a particular kind of story – an *identity myth*' (Holt 2004, p. 2, emphasis in original). More directly, it is less about the physical products themselves (CDs, books, soft drinks, designer bags) and more about the ideas that products communicate to consumers through identity myths that compel people to buy (and buy into) the brand:

> Brand stories have plots and characters, and they rely heavily on metaphor to communicate and to spur our imaginations. As these stories collide in everyday social life, conventions eventually form. Sometimes a single common story emerges as a consensus view. Most often, though, several different stories circulate widely in society. A brand emerges when these collective understandings become firmly established. Marketers often like to think of brands as a psychological phenomenon which stems from the perceptions of individual consumers. But what makes a brand powerful is the collective nature of these perceptions; the stories have become conventional and so are continually reinforced because they are treated as truths in everyday interactions. (Holt 2004, p. 3)

Thus, the narrative power of music is a critically important point in seeking to understand the evolution and/or the convergence of the

recorded music sector into the creative industries. Companies investing in musicians and recorded music have begun to fully comprehend the fact that music is one of the most potent means of generating a meaningful brand narrative through which powerful brand identities are created and have resonance with consumers. Put another way, it can be argued that the value of recorded music is no longer primarily measured in its worth as a saleable physical (or digital) product, but instead through its emotive value in contributing to the consumer experience, or a lifestyle. 'The product is simply a conduit through which customers can experience the stories that the brand tells … An effective cultural strategy creates a *storied product*' (Holt 2004, p. 36, emphasis in original). Thus, when a product and music (and/or musicians) can work together to create a compelling brand narrative, its success resonates throughout contemporary popular culture, reflecting and refracting issues and subjects that are significant in a given period of time and within the contexts of prominent cultural conversations. But equally important is that the reverse is also true: the creation of a compelling narrative, as told through affiliation with relevant product(s), can move a performer from a well-known musician to a world-class brand.

One of the most successful products to effectively utilize recorded music in the creation of a cultural brand is Coca-Cola. Beginning in the early 1960s, advertising executives working with the soft drink manufacturer were amongst the first to understand the inherent efficacy of reaching out to key demographic groups (in this instance, young people) in ways that were integrated with – and not apart from – their own cultural contexts:

> On March 15, 1965, a special announcement was sent to Coca-Cola bottlers letting them know that the company was embarking on a new way of advertising on radio. The days of the traditional jingle were over. The first flight of ads featured The Four Seasons, Jan and Dean, The Shirelles and John Bubbles. Artists composed and recorded songs in their own styles. Stars were asked to incorporate the Things Go Better with Coke slogan into a song, which was generally inspired by one of their big hits. All of the songs sounded like music any teen would have heard on the radio; the Jan and Dean version segued into a modified version of 'The Little Old Lady from Pasadena,' which hit No. 3 on the Billboard charts only a few months before the release of the ad. (Ryan 2013)

Ryan (2013) notes that the success of this model of 'radio ads hit' persisted for nearly a decade, reaching its zenith in 1971 with the New Seekers' recording of 'I'd Like to Buy the World a Coke' for a television ad campaign. The song became so popular it was hastily re-recorded by a

group of studio musicians and given the new title 'I'd Like to Teach the World to Sing', released to radio and reaching number 13 on *Billboard*'s Hot 100 chart.

While this is an interesting historical example of the power of popular music in advertising, 'I'd Like to Buy the World a Coke' is significant to this argument for at least two further reasons. First, it wasn't simply the song's catchy chorus that made it a hit. In semiotic terms, the message of the song's 'peace-and-harmony' lyrics in tandem with the visuals of the television advert established a link in consumers' minds of the relevance of Coca-Cola to a cultural narrative resonant and relevant to the era.[2] But in cultural branding terms, it is a case of the medium being the message – the potency of the recording itself that made the ad campaign so successful: 'The brand's value resides in the specifics of the brand's cultural expression: the particular cultural contents of the brand's myth and the particular expression of these contents in the communication' (Holt 2004, p. 36). Simply put, it was the power of the recording that drove the popularity of the ad campaign and not the reverse. That the song was used to promote a beverage was almost inconsequential. Instead, it was the fact that popular music – the medium of counter-cultural icons like Bob Dylan and the Beatles – was used to convey the ad's message that made it so resonant with young consumers. In effect, Coke's brand succeeded in this period because the advertising message – communicated via the music – implied that hippies and the counter-cultural generation could really achieve a world filled with peace and harmony, perhaps even just through the simplicity of the act of sharing a Coke (Holt 2004) – precisely the message that young people of the time wanted to hear.

The second reason this ad campaign is worth looking at in detail is for the somewhat counterintuitive reason that despite its success, Coke effectively abandoned not only the brand message of 'peace and harmony' but also the entire practice of commissioning radio ads hits within about 18 months. Rather than trying to replicate the success of the 'I'd Like to Buy the World a Coke' campaign, the company and its marketers realized that holding on too long to a single message relevant in one fleeting cultural moment would make the brand seem outmoded and out of touch: Coke 'succeeded by moving away from [its] initial branding – [its] supposed brand essence at the time – to address shifting currents in American society … These revisions of the brand's myth are necessary because, for a myth to generate identity value, it must directly engage the challenging social issues of the day' (Holt 2004, p. 37). Indeed, as its product line has expanded, and, as societal attitudes towards the whole of the sugary drinks industry have changed over time, Coke has regularly

updated both its product line and the messages it aims to communicate (its brand identity), but has consistently retained the notion that recorded music is the most effective means of reinforcing that message. Since the 1960s hundreds of pop acts have endorsed Coke products, had their music used in television and radio adverts and now, integrated into Coke's social media campaigns. From acts like Blondie, the Band, Elton John and the Rolling Stones to more contemporary acts including the Ting Tings, American Hi-Fi and Ingrid Michaelson, whose song 'Be OK' was used in a recent Coke ad campaign promoting the drink as part of a 'healthy lifestyle', recorded music remains the medium of choice for the drinks company. Statistics suggest that Coke is not alone in fully embracing the value of recorded music. In their 2013 report titled *UK Brand Spends in Music*, PRS and music and entertainment strategists Frukt indicate that global brands including Coca-Cola, Blackberry and Volkswagen spent £100 million on music in the UK in 2012 across six key channels: live music sponsorship, event creation, artist endorsement, digital, TV and advertising support, with artist endorsement, TV and advertising accounting for 50 per cent of the overall spend (Frukt and PRS for Music 2013, p. 2).

What these figures confirm, then, is the fact that recorded music cannot be considered a failing sector or industry. While consumer sales of albums and singles may never regain the volume they had at their 1990s peak, it is clear recorded music has, finally, begun to recover and to reinvent its primary competency as existing within B2B activity, focusing attention less on consumers and more on developing creative industries partnerships whose use of recorded music across a variety of media, formats and products bring new recordings and new acts to a wider and more diverse audience than ever before. Robert Ashcroft, Chief Executive of PRS for Music, has commented that 'Innovative companies understand the power of a good song and how a memorable music experience inspires and connects with fans … the last 12 months have demonstrated the unique power of music to convey brand value and how the right partnership can benefit music lover, songwriter and business alike' (cited in PRS for Music.com 2013). Similarly, Anthony Ackenhoff, Chief Executive Officer of Frukt has noted, 'The brand and music space is an incredibly active and vibrant one. We've seen an increase in both the volume of activity and sophistication of platforms over the last five years and there are no signs of this changing. Music is something people instinctively love – when brands improve or enrich music moments and experiences they strengthen relationships with their consumers' (cited in PRS for Music.com 2013). As these comments bear out, popular music, specifically recorded music, has in recent years become increasingly

implicated with brand and branding activity. In turn, branding activity both underpins and connects various and multiple sectors within the creative industries. Within this context, the role of recorded music is self-evident. But a critical point to take away from this discussion is that the relationship between effective cultural branding and recorded music is not a one-way relationship. While music clearly adds value to advertising, marketing and branding activity, the reverse is equally as true: the strategies, logics and tactics involved in effective marketing, branding and advertising can help music acts to become global brands themselves.

FROM MUSICIAN TO CULTURAL BRAND

While the term 'branding' is often conflated in popular (music) discourse with similar practices of 'sponsorship', 'advertising' and/or 'marketing', it is important to make the distinction clear. From the earliest origins of modern 'popular' music, performers and companies alike have grasped onto the inherent mutually beneficial arrangement of so-called 'celebrity' endorsements. Even dating back as early as the late nineteenth century, Jenny Lind, the 'Swedish Nightingale', working with svengali P.T. Barnum, parlayed success as a popular singer into a range of endorsements, spin-off products and tickets to coveted, sold-out live concerts, in a practice not at all dissimilar to today's contemporary pop acts (Tick and Beaudoin 2008). Similarly, scores of companies have sought to bask in the reflected coolness of music acts popular with their core consumers by sponsoring live performances, concerts and tours, amongst them Xerox and Sting in 2010, and Keds and Taylor Swift and Prudential and the Rolling Stones, both in 2014. But a joint promotional relationship between an act and a product or company is not the same thing as the creation of a brand: 'A brand emerges as various "authors" tell stories that involve the brand. Four primary types of authors are involved: companies, the culture industries, intermediaries (such as critics and retail salespeople), and customers (particularly when they form communities)' (Holt 2004, p. 3). Thus, whilst endorsements, sponsorships and advertising can help to create an image or relay a message in consumers' minds, they only tell part of the story, in both the practical and literal senses. Narrativity is the one quality that most distinguishes branding from other similar forms of marketing and advertising. Branding is interactive, adaptable, based on shared cultural understanding. Especially in an age where instantaneous social media is at the core of much cultural communication, consumer feedback is now collected, integrated

and fed into the creation, development and maintenance of brands more than ever before.

For a number of contemporary musicians, then, the integration/convergence of the music and creative industries has had clear implications for the role narrative and branding play in their career development and trajectory. For instance, reality music television shows like *The X Factor* and *Britain's/America's Got Talent* place a heavy emphasis on the 'journey' contestants take from the beginning to the end of a series. Not unlike a soap opera or drama series, audiences learn about the life histories of performers in a serialized format, with a little more detail revealed in each weekly episode. Quite typically, these biographies are mediated in a kind of 'everyman/rags to riches' story arc, with the contestant's success on the programme positioned as a Hollywood-style triumph-over-adversity happy ending. Throughout this process, the act's song selections and live performances help to underscore the brand narrative that is forming around the contestant. For example, Susan Boyle, who placed second in the 2009 series of *Britain's Got Talent*, captured the world's attention with her rendition of torch song, 'I Dreamed a Dream' from the Broadway and West End musical juggernaut *Les Miserables*. At the time of her audition for the programme, Boyle's unpolished appearance, awkward stage presence and evident nervousness belied a powerful voice that seemingly astonished and impressed the judging panel and audiences alike. Her musical ability, her middle-aged, everywoman appearance, along with the inherently apt song title, made Boyle an overnight sensation which she (and her team, Simon Cowell's Syco Management) have managed to develop into a sustainable stage-and-studio career worth an estimated £20 million (dailyrecord.co.uk 2013).

In this regard, my argument here is that for many contemporary musicians, having a successful musical career may no longer be their sole or primary objective. While a majority of local and/or independent musicians may never develop a fan base big enough to ever usefully develop their own brand, many national- and global-level acts are increasingly looking to build upon their musical personae/achievements to foster a personal brand that not only spans multiple sectors of the music industries but indeed multiple sectors of the creative industries and beyond. As Kim (2013) notes, an increasing number of companies across the breadth and depth of the creative industries are naming celebrity 'creative directors' as part of their organizational structure. While it's unlikely the celebrities and musicians named to these posts are actively involved with the day-to-day operations of the companies or products, the designation of 'creative director' implies a closer, more integrated and

dedicated involvement between the company, the product and the star, beyond that of a mere 'spokesperson' or 'brand ambassador' (Kim 2013). Moreover, the types of celebrities selected for these kinds of posts are those who have already proved themselves capable entrepreneurs through success of earlier music-brand-brand-extension ventures.

For instance, in 2004, Gwen Stefani released the song 'Harajuku Girls', a homage to the street style and culture of the Harajuku district of Tokyo. On her subsequent tour, Stefani called her troupe of female backup dancers the 'Harajuku Girls', all of whom were dressed in bright and boldly patterned outfits based on Stefani's 'techno-pop' interpretation of Harajuku culture (gwenclothing.com 2007). The Harajuku concept proved so popular amongst Stefani's fans, in 2005 she launched the Harajuku Lovers brand, with a range of accessories, fragrance and clothing products. The Harajuku line, alongside Stefani's more mainstream fashion label L.A.M.B. (an acronym for Love Angel Music Baby, taken from her 2004 album of the same name), is available at some 275 retail chains around the world and estimated to be worth $90 million annually (gwenclothing.com 2007). Following on from the success of the Harajuku brand, Stefani struck a deal with Hewlett-Packard, HP, in 2007, as a creative director for the company's new line, HP Touch (adage.com 2007). In this role, Stefani served as the spokesperson in the line's television advertising campaign, Touch 2.0. In addition, HP built a microsite for Stefani, which featured 'a create-your-own Harajuku-styled avatar function, original, printable illustrations drawn by the pop star, as well as a purchasable Sweet Escape Tour scrapbook that include[d] Gwen's personal photos and a section to upload your own pics and captions' (adage.com 2007).

To date, the long-term costs and benefits to both the companies and artists involved in these creative partnerships remain unclear. As with any brand, the narrative established through the partnership must resonate with and be meaningful for consumers. In Stefani's case, feeling is mixed. Advertising executive Shane Ginsberg has commented that 'Gwen started doing HP touch stuff and it seemed somewhat believable though I don't think she's sitting with scientists in Palo Alto to interact with PCs, granted she is using the device, which is fine' (cited in Kim 2013). Indeed, Stefani, and other global pop acts including Will.i.am, Lady Gaga and Taylor Swift have all engaged in similar corporate creative director partnerships. Whether these deals ultimately prove helpful or harmful to the economic as well as creative elements of their careers, the fact they exist at all is what is worth considering in more detail. Writing in 2004, Holt argued that:

> As consumers have become increasingly cynical about firm-sponsored communications, senior managers have eagerly shifted their attention to the other engines of identity value: the culture industries (via product placements) and populist worlds (via viral branding efforts). This shift makes sense. Society's best mythmaking engines are found in these two locations, not in advertising. But marketing has yet to crack the code on how to develop branded cultural texts, largely because the discipline continues to apply conventional branding models to the cultural terrain. When cultural texts are viewed as mere entertainment, rather than as myths, their potent identity value remains hidden. (p. 184)

In the intervening decade, Holt's theory has been proved correct. Cultural branding has followed the precise trajectory he has described above, with a shift away from corporate, seemingly 'inauthentic' campaigns, to ones that increasingly seek to reach out to consumers in ways and in media that are part of their everyday lives. Moreover, I would make the assertion that marketing has now, in fact, actually 'cracked the code' for developing cultural texts. The above examples demonstrate not only that recorded music is effective in helping to create meaningful brand narratives for companies and products but also that the reverse is true: that companies, musicians and other creative industries practitioners are coming together in countless configurations to create genuine and effective branded cultural texts in which recorded music plays a central role.

CONCLUSION

Read together, it becomes clear that recorded music is not the 'sinking ship' that Thom Yorke described, but instead evidence of an industry reinventing itself. Through 360 degree deals, major labels found a mechanism through which they could generate revenue beyond album sales. More significantly, however, 360 degree deals have been a catalyst in motivating new aesthetic, cultural and strategic understanding of the value of music, musicians and music products within the wider creative industries. It is a transformation from a one-way, top-down flow of information to a system of multiple layers of bidirectional communication, linking musicians and fans, as well as the music and creative industries. Holt's (2004) thesis of cultural branding dictates that value is something that is narrative-driven and that products that tell compelling stories are the ones that resonate most through popular culture. In this regard, the recorded music sector can be seen as adapting rather than collapsing in the face of industrial upheaval. It has shifted from an

industry that sells records to an industry that sells brands, or narratives, often via the medium of recorded music. Strategic alliances with firms within other sectors of the music industries and indeed from across all sectors of the creative industries have enabled record labels (or 'music companies') to extend the reach of music across multiple media and across multiple platforms in a way that is not only financially pragmatic but also culturally resonant within contemporary popular culture. Through all of these developments, it may therefore be reasonable to conceive of recorded music not as a 'sinking ship' but as more relevant and more powerful than it ever has been, freed from value measured in numbers of units sold or airplay spins but instead through cultural relevance and impact.

NOTES

1. An ironic footnote being that after such a protracted and ugly dispute, in April 2014, Prince re-signed to Warner's, finally gaining control of his master recordings and collaborating with the label for a deluxe 30th anniversary re-release of his landmark *Purple Rain* album as well as recording new material.
2. A copy of the 1971 advert can be viewed on Youtube: http://www.youtube.com/watch?v=1VM2eLhvsSM.

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