

# The music industry redefined by scholars

## A bibliographical study to intermediaries in the music industry

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## ABSTRACT

This research examines whether there is a shift in positions and influence among intermediaries in the music industry through a content analysis of 255 articles on music intermediaries obtained from the Web of Science database. When the music industry transformed from a publishing industry into a recording industry, there was also a shift from publishers as dominant institutions to record companies. Recently the music industry has dealt with several changes related to the digitalization of music. It is interesting to examine whether this has also created a shift of most influential intermediaries. It can be concluded that digitalization enabled a lot of new intermediaries to enter the market and that they did take over the pre-selection role of record companies who now function as post-selectors. These smaller or new intermediaries are launching and developing artists careers and play a important role in determining which artists will be signed by major record companies.

Keywords: intermediary, gatekeeper, music industry, record industry, digitalization

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## **1. Introduction**

The recorded music industry is about one hundred years old and since then record companies have determined the musical landscape by controlling distribution and promotion channels (Alexander 2002). However, before music was recorded this influence was in hands of publishers. Publishers determined which compositions were released on sheet music for the public to buy and play at home. When the music industry shifted from a publishing industry to a recorded music industry, there was simultaneously a shift in the influence of the intermediaries. The last decades, the industry has known drastic changes which might have impacted the positions of intermediaries again.

The digitalization affected the music industry in multiple ways. Artists became able to directly address their fans without the help of record labels, copyright regulations were infringed by peer-2-peer filesharing platforms, and a lot of new music intermediaries entered the market. All this affected the music industry, especially the role of traditional intermediaries like record labels and publishers who were once the most important intermediaries in the music industry. Revenues decreased drastically and thus the traditional intermediaries needed to find ways to collaborate with the new intermediaries. Several scholars argue that major record labels lost some of their influence as a gatekeeper. Before the digitalization they were the ones to determine which music was exposed to the consumer, since they owned distribution companies and influenced radio programming. Nowadays, the influence of decisionmakers in the music industry is more broadly spread and their market power is reduced. Intermediaries gaining influence are independent labels, online music blogs, streaming services and many more.

The Internet and social media platforms not only made it easier for artists to enter the market and find an audience for their music, it also became easier for new intermediaries to enter the industry. Artists do not have to rely solely on the traditional intermediaries, but can focus on the new and smaller intermediaries which tend to be more supportive for beginning artists. Although entering the market might have become easier, there is still an important role to play for traditional and new intermediaries. This is reflected in the increase of number of intermediaries in the music industry after the introduction of the Internet.

This research aims to examine if there has been a shift in research topics and

importance of certain intermediaries in the music industry in academic literature gathered from Web of Science. As this phenomenon has happened before with a shift from publishers to record companies. Popular topics according to academics, and their view on intermediaries in the music industry, will be studied for two periods determined by trends in the music industry. The first period is from 1983 to 2000 this is from the introduction of the CD (Klaes 1997) until the widespread use of illegal downloading through platforms like Napster which came into use in 1999. The other period is from 2001 till 2018, as this period represent a transit from illegal downloading to legal streaming and downloading. iTunes was in 2003 the first platform that enabled legal downloading and showed that consumers were willing to pay for their music. Shortly after, streaming services like Pandora and Spotify gained an enormous popularity by offering a freemium and subscription option to consumers. Not only will the popular research topics in these two time frames be examined, the intermediaries mentioned in texts will be counted to see if there is a shift in focus on certain intermediaries.

In academic literature, intermediaries in the music industry are widely researched. Most often in relation to, diversity, piracy and copyright, entry barriers and do-it-yourself artists, and the value chain of the music industry. Intermediaries play a huge role in determining which music will reach an audience and these companies make sure that the work of artists is protected and that the royalties are collected. DIY-artists are trying to make it without the help of the traditional intermediaries, and this trend impacts the importance and value chain of intermediaries. The purpose of this thesis is to make an overview of the topics that are researched regarding intermediaries in the music industry and the findings of the articles to identify gaps in academic literature and to examine if trends in academic texts reflect developments in the music industry.

Thus, the aim of this study is to describe and create an overview of content. This is one of the main purposes of content analysis according to Berelson (1952). By examining the perspectives of academics regarding intermediaries and by counting different intermediaries mentioned in academic research this study aims to identify the major topics discussed and the developments over the years regarding intermediaries in the music industry (Treadwell 2013). The outcome of the research can be relevant for existing intermediaries, aspiring artists or academics. It will give an overview of all the intermediaries in the industry which can be used by intermediaries to identify all companies competing in the market, for artists it might give new insights on how to enter the industry, and for academics to list research opportunities regarding specific intermediaries. Neuendorf (2002) states that content analysis has some predictive capabilities regarding the power relations between intermediaries which

in this case might be of interest to all professionals in the music industry (Treadwell 2013).

This research is structured as follows. In the next section is theory regarding intermediaries discussed and the most occurring themes relating to music industry intermediaries. After that, the methodology will be presented which will subsequently be followed by an analyses of search results from Web of Science and an analyses of the specific dataset of text which focuses on intermediaries in the music industry. After these analyses are discussed main conclusions will be presented.

## **2. Theoretical Framework**

### *2.1 Intermediaries, gatekeepers, certifiers and tastemakers*

Spulber (1999) defines an intermediary as an economic agent who buys from suppliers to resell it to consumers or who helps in matching suppliers and consumers and coordinate the transaction. Spulber summarizes the intermediation theory of the firm as follows: “Firms are formed when the gains from intermediated exchange exceed the gains from direct exchange” (p. ix). He argues that intermediated exchanges have for several reasons advantages over direct exchange between the supplier and consumer. Among these advantages are lowering the transaction costs through centralized exchange, pooling and diversifying risk, reducing search costs and reducing moral hazard. Spulber states that firms establish and operate markets by ‘selecting the prices, clear markets, allocate resources, and coordinate transactions’ (p. ix).

The terms intermediary and gatekeeper are often intertwiningly used in the same context. The term ‘gatekeeper’ was first coined by Kurt Lewin in 1947 in relation to the channeling of food from a farm to the dinner table. Later he stated that it also relates to communication channels that determine which news items are blocked and which are passed through (Rutter 2016). Since then, several studies have been done on the influence of gatekeepers in the production and distribution of cultural products as books (Powell 1985), news publications (Tuchman 1978; Gieber 1964) and music recordings (Peterson and Berger 1975; Lopes 1992). Before the turn of the century, the gatekeeper was vital in the market since production costs of cultural goods were high. Since producers face a large uncertainty regarding demand and investments were high, it was carefully determined which products to produce and which not. Today it is not so much about which products are produced but more which products will be heard and known by consumers. Thus, gatekeeping still exists but it

focuses more on product exposure than production (Hargittai 2000).

Other researchers described cultural producers and distributors as mediators between the creators and consumers. Pierre Bourdieu used the term ‘cultural intermediaries’ or ‘new cultural intermediaries’ to describe the organizations involved in bringing cultural goods and services to the public. In his book *Distinction: A Social Critique of the Judgment of Taste* (1984) he described programmers on television and radio, or critics and journalists of newspapers and trade magazines as the core of cultural intermediaries. Thus, Bourdieu sees cultural intermediaries as tastemakers. Intermediaries are also known as certifiers, giving a sign of a certain kind of quality of a cultural product (Caves 2000).

Personnel regarding ‘design, packaging, sales promotion, PR, marketing and advertising’ are falling in Bourdieu’s category of ‘new cultural intermediaries’ (Nixon and Gay 2002). Schudson (1996) believes the term ‘mediator’ is conceptually preferable to the ‘gatekeeper’ metaphor. Mediator is commonly used in production models since it does not solely focus on the ‘selecting, sorting and ordering of raw materials’ which will reach the public. Mediators are important for their analytical strength, not only from the perspective of producers but also of consumers (interpreters) of cultural goods (Ahlkvist 2001). Although Hirsch (1972) uses the concept ‘gatekeeper’, he describes gatekeepers as ‘surrogate consumers’ because he conceptualized them as screening cultural products on behalf of the consumers (Ahlkvist 2001).

Caves (2003) argues that intermediaries are needed, especially in the cultural industries. Artists need humdrum inputs like selecting, manufacturing, distributing and marketing which are offered by intermediaries in order for their product to reach the critical mass and create a buzz.

## *2.2 Music industry intermediaries and their roles*

The term gatekeeper, as applied in the music industry, stems from sociological studies on news in the media of the 1940s and 50s. The concept is used to describe every person or organization that acts between artists and the public. For the music industry these includes record companies, publishers, radio stations, A&R managers, pluggers, programmers, DJ’s, journalists, promoters, collecting societies and many more (Rutter 2016). As Shoemaker (1991) puts it, it involves everyone who is involved in the selection, handling and control of a message or in this case an artist and its music. For the last hundred years, the main

intermediaries between an artist and the market have been record companies and publishers. Below, traditional and new intermediaries will be discussed. In figure 1 is shown how all intermediaries in the music industry are connected and dependent on each other.

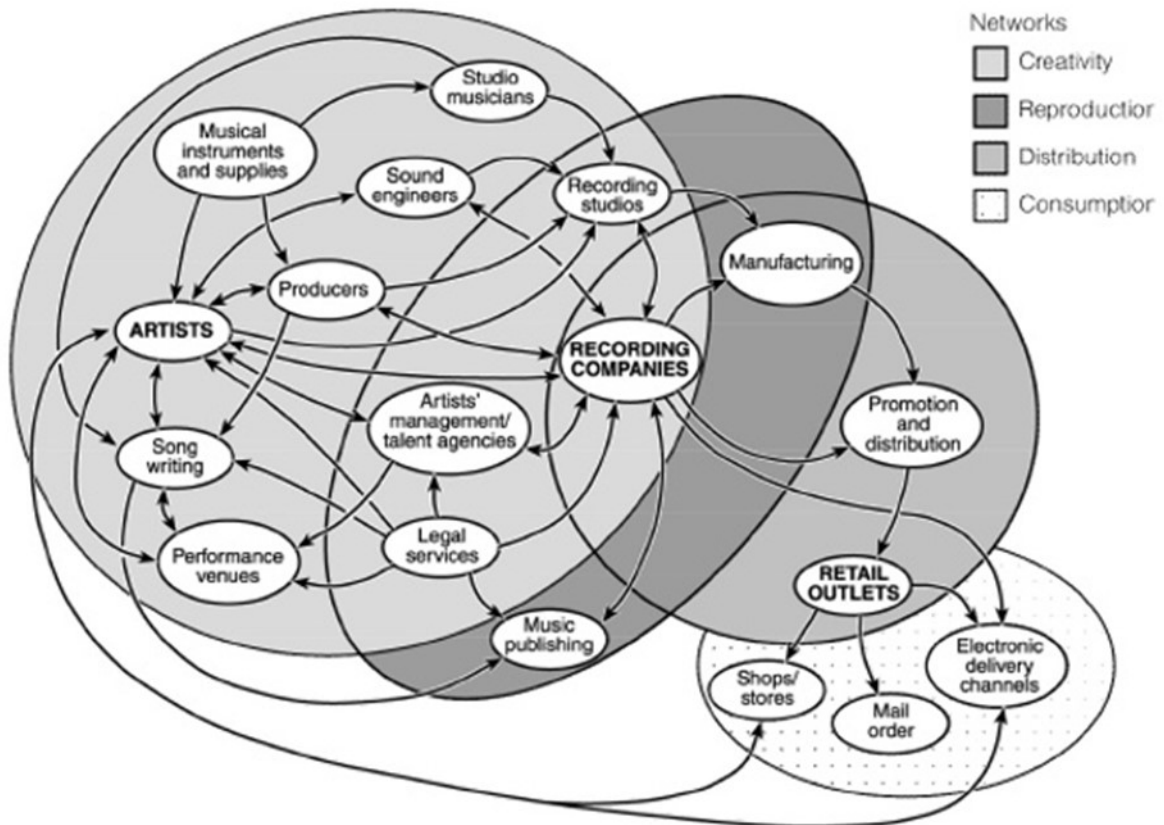


Figure 1: Networks in the music industry (Source: Leyshon 2001, p. 61)

### 2.2.1 Record company

Major record companies operate on a global scale and dominate the music industry. Majors exist out of different departments, record labels and subsidiaries. These record companies are horizontal integrated by the merging and acquiring of other record labels. This is an efficient tool to increase market share since it reduces competition. Besides horizontal integration, major record companies are also vertically and laterally integrated. In the case of vertical integration, it means that the majors own recording studios, pressing plants, distribution companies and publishing companies. Lateral integration holds the ownership of companies focused on media and marketing. The integrated business models allows the majors to control as much of all aspects of the production chain of recorded music and to assure the promotion



of their releases and artists. Thus, the major record companies own their own international distribution network which also distributes records for independent record companies (Anderton et al 2013).

For independent companies it is almost impossible to successfully establish themselves and compete with the big three. Those independent record companies who do manage to release music that successfully sells are likely to lose their artists to a major label or are bought up themselves. This has happened to successful labels like Motown, Virgin and Island (Chernofsky 2016). Independent record companies are only completely independent when they release music without using the business structures of the majors for pressing, distribution and promotion. Scouting new talent and developing the artists are tasks that are nowadays mainly performed by independent labels. These companies can be seen as experimental laboratories for the major record companies.

An A&R manager of a record company has three main responsibilities. They have the task to find talent, develop signed artists, oversee the recording process and to assist with marketing a promotion. Other departments in record companies are plugging the songs to radio stations, arrange promotion through the press and make sure that there are enough products produced and distributed to meet the demand. Record companies help the artists in passing subsequent intermediaries (radio, tv, press) in order to reach the audience. Due to decrease in revenues since the turn of the millennium, record companies changed their A&R strategies. They prefer to sign already developed artists instead of seeking, nurturing and developing new talent themselves (Anderton et al 2013). Since the 1990s the music industry started to move away from selling physical products to the selling of musical rights and the collection of royalties. Burnett (1992) predicted in his research that in the future the income generated from publishing and performance rights will be equally important for record company revenues.

### *2.2.2 Publisher*

The activities of publishers are partly similar to that of record companies. Like record companies, publishers are also sourcing for new talent and invest in the development of songwriters by financing and producing new works. A publisher also promotes and secures the commercial exploitation of recordings which is called 'song plugging' and it administers the royalty income from primary and secondary exploitation, which entails performances and broadcasts, but also recordings and adaptations (Kretschmer et al 2001).

The activities performed by the A&R manager in a record company are done by music supervisors at publishing houses. These supervisors sign, promote and develop new songs and songwriters. Besides these tasks, a publisher has three main roles: registration, exploitation and collection. Registration means to ensure that new songs are properly copyrighted. Exploitation is making sure that a song is placed in as many different contexts like commercials, tv-series, films, videogames, but also public spaces like shopping malls and restaurants. The most critical role of a publisher is probably collection. Publishers collect royalty fees and make sure that the income is transferred to record labels, artists and other parties (Anderton et al 2013).

### *2.2.3 Collecting society*

Collecting societies, also known as performing rights organizations administrate various rights and collect and distribute royalty payments and license income for other parties like publisher, record companies and artists and songwriters. Each country has their own collecting societies. In the USA, there are three main organizations which administer the performance rights. These are the American Society of Composers, Authors and Publishers (ASCAP), Broadcast Music, Inc. (BMI) and SESAC (Anderton et al 2013).

### *2.2.4 Radio*

Some argue that radio stations are the most important players in bringing music to the public. Hirsch (1972) sees disk jockeys and programmers at radio stations as the most important factor in deciding which music the public will learn about. He argues that the programmer at a radio station is a 'surrogate consumer' since its tasks is to reflect the tastes of the listeners of the radio station. Thus, the goal of the programmer is to minimize the difference in music taste between the station and their target audience. For this, it matters less what the programmer thinks of the quality of a record and more what their core listeners think of it (Ahlkvist 2001). Hirsch goes even a step further and calls programmers and deejays as fashion experts and opinion leaders to other players in the music industry (Rutter 2016).

However, according to research of Rothenbuhler (1985), radio programmers and DJ's rely heavily on the pre-selection and promotion of records by record companies. It starts by the record companies believe that a song will be a hit in the station's format. Radio promoters or pluggers develop personal relationships with the decisionmakers at a radio station to make

sure their singles will receive airplay. A quote of a programmer in Rothenbuhler's study stresses this: 'I won't add anything unless a record person says they're gonna be looking for this [record]. I can't think of any [records] that I've added that haven't worked [promoted]' (Ahlkvist 2001, p. 350) Thus, radio stations and record companies are interdependent of each other. The record company needs the support of the station in order to promote their music and the radio needs the pre-selection of the record company to make their program as attractive as possible for their target group and advertisers. This highlights the complex roles of different levels power and influence in the music industry (Rutter 2016).

### *2.2.5 Retailers*

Retailers do the actual selling to consumers. In the 1970's specialist and independent record stores had trouble competing against large record chains as Tower Records and HMV. Two decades ago, records were primarily sold through brick and mortar stores. The number of specialist, small record stores decreased after the establishment of these record store chains. Since the introduction of the internet, the number of specialist record stores is still diminishing as are the larger chains and department stores. This impacts the diversity of music that is offered in stores since record departments in larger chains become more superstar focused since shelf space is diminished.

Online retailers of physical products such as Amazon and CD Baby offer a broad selection of music since they are not limited by the scarcity of shelf space. Their audience reach and the broad range of music sold, decreases the risk of selling niche music which is focused on a very specific audience. Besides, online retailers offer consumers the chance to read customer reviews or reviews from blogs and other influencers, often a sample of the songs can be played as well. Taking Amazon.com as an example, it uses a push service to recommend other products based on the customers product searches. These services to discover new music could improve the 'match' between the product bought and the consumers' taste (Anderton et al 2013).

### *2.2.6 Magazine*

Besides radio, journalists of trade magazines are also important in the allocation of attention to particular products. Music journalists write reviews, feature articles and news stories about

music and artists. This act is valuable in several ways. It connects audiences to music and artists and it generates artistic and commercial value. The main music trade publications are *Billboard* and *Rolling Stone*. Magazines have a symbiotic relationship with record companies since journalists and critics need music to write about and record companies need the trade magazines to promote new releases and their artists (Anderton et al 2013). *Billboard* is the most recognized music magazine and is since the 1940s of importance to record labels, artists, radio stations and consumers by offering charts. These charts are used to predict the success of new artists and to analyze trends in music. However, next to these major magazine brands, fanzines are deemed most important for promoting niche music, music communities and gatekeeping music tastes (Frith 2002).

Since about 20 years, major and independent music magazines developed an online presence since the sales of printed music magazines decreased. They explored possibilities of adding audio and audio-visual content in their articles. Thus, the role of the journalist and critic remained critical as tastemaker in the promotion of artist and their music (Anderton et al 2013).

### 2.2.7 Blog

Next to the online music magazines, there can be a wide selection of influential music blogs found online. These blogs have become an important promotional target for record companies and established and beginning artists. It is suggested by Anderton et al (2013), that blogs have become the key players in online music journalism. The importance of journalists and critics of blogs has risen. Especially independent blogs are valuable for their critical voice and can be seen as the digital version of fanzines (Frith 2002).

An example is the music blog Pitchfork. This website takes its role as a tastemaker very serious, sometimes even to the point that it is accused of snobbery. Pitchfork, had a large and diverse (in terms of genre) readership, which makes it very fruitful for a small, independent artist. However, getting a positive review on Pitchfork does not guarantee commercial success. Besides, the majority of independent artists will not appeal to the editors of Pitchfork and are denied publication to their readership. However, there are many more online publications that are longing to be credited for being a boost for the next big artist. Often, to be reviewed in Pitchfork or other large online music publications, the artist needs to receive coverage in smaller publications (Chernofsky 2016).

### *2.2.8 Music television*

Music television is an important promotion tool for artists, however it is mainly a platform for commercially successful artists since often a large investment has to be put into the making of a video clip. The largest global music television network was MTV which was launched in 1981. At first it's focus was completely on music videos, but through the years it started programming more and more reality, comedy and drama shows which nowadays not even involve a lot of music artists.

On the internet there is also a platform for music videos. Vevo is a video service established in 2009 by the three biggest record companies Sony Music Entertainment, Universal Music Group and Warner Music Group. Instead of another video platform, YouTube, only admins are able to upload content on Vevo. Thus, there is a selection of content that is heavily influence by the recording companies that own the platform (Anderton et al 2013).

### *2.2.9 Manager*

Artists managers or personal managers assist artists in the development of the musicians' career. The main tasks of these managers is to increase the public of the artists by arranging press publications, bookings at venues and radio airplay (Hull et al 2011). For a manager to successfully pitch the artists to more influential players in the music industry the use of their network is critical.

### *2.2.10 Distributor*

After the recording and manufacturing process, distributors play a key role in efficiently delivering recorded music to consumers. Until the turn of the century, the majority of the revenues gathered in the music industry were generated by the manufacture and distribution process. Traditional distribution companies distribute physical copies of recorded music in the form of vinyl and CDs and handle the returns of physical copies. Since recently, digital distributors entered the market to distribute music or copies of recordings in digital formats. Due to the popularity of digital music, several significant distribution companies became

bankrupt, impacting the retail sector of the music industry as well. Also record companies might turn bankrupt when their distribution company is forced out of business. The relations between record companies, distributors and retailers are interdependent (Anderton et al 2013).

When CD's have been manufactured, the record company passes the product on to the distributor. The distributor's role is to persuade retailers to stock their products and to restock them in time. As has been mentioned before, the major record companies own their own international distribution network and also offer this as a service for other record companies. Independent distribution companies, thus not (partially) owned by a major recording company mostly offer distribution on a national level.

Distribution companies not only deliver physical recorded music to retailers, they also actively promote certain releases to retailers. They convince retailers to devote the an existential part of the shelf space to the products that they distribute and negotiate privileged placement within the store. The more products sold will not only benefit the record company, but also the distributor and the retailer (Anderton et al 2013).

The logistics of digital distributors are less complex since it only requires one copy of a music file to distribute it to a wide range of online retailers like iTunes. Instead of distributing a product from place to place, digital distribution is more an administrative activity. Although the processes have radically changed since the digitalization of music, there is still a need for specialist industry knowledge. Typically, digital distributors are new entrants and not physical distributors that learned a new skill or offered a new service. These new digital entrants will be discussed shortly as follows (Anderton et al 2013).

### *Peer-to-peer network*

Through peer-to-peer (P2P) networking technology, files can be shared to other users on that network. In P2P networks, a set of central servers links people who have certain files with the ones who request the file. Thus, the file would be transferred directly from one computer to another. The first P2P network was Napster, introduced in 1999. It turned out to be a popular technology among users and soon software like Kazaa, Gnutella and BitTorrent followed this model. These P2P networks were held liable for copyright infringement and were fought by major record companies and recording organizations (Anderton et al 2013). However, this

turned out not to be the ultimate solution. New business models needed to be introduced in the music industry to decrease the popularity of illegal downloading.

### *Legal Download store*

Online stores like iTunes and Amazon offer catalogues of more than a million tracks in all genres. Instead of forcing the consumer to buy a whole album of an artists, these stores offer separate download files. This phenomenon is also known as unbundling. The iTunes store is the biggest market player in this segment, and is part of Apple Inc. The store opened in 2003 and already became the largest music vendor of the world in 2010 (Apple.com, 2010).

### *Streaming Service*

Streaming services as for instance Spotify, Deezer and Pandora, offer advertising supported music streaming services. Instead of paying for a download of recorded music, the songs can be accessed online (Anderton et al 2013). Most streaming services also offer a payed, advertisement-free subscription. The subscription allows the consumer to download songs, albums or playlist for offline use as well.

Streaming services provide curated playlists to introduce the consumer to new music of quality. Besides the curated playlists, these services also offer a music recommendation system to select songs based on listening preferences. Pandora was the first service to extend their curators with an algorithm in order to offer the consumer new music. Spotify and other streaming services soon followed this new development of algorithms (Chernofsky 2016).

### *2.2.11 Blockchain*

Blockchain is a decentralized, public database (ledger) that records transactions that are paid with digital currencies as BitCoin and DogeCoin. Thus, the information is stored in a shared and constantly updated database. Everyone connected to the blockchain network has access to the ledger. This publicly available database is not controlled by one single entity, making it a transparent collection of data. Blockchain offers secured tools for artists to handle transactions directly with their consumers (Nowiński and Kozma 2017) reforming the organization of rights and royalties in the music industry due to efficient tracking of

intellectual property and transactions (O'Dair et al 2016)

Blockchain could store ownership of performers, songwriters, producers, publishers and labels, and how the royalties are distributed between them. With this new technology, music can be published on a ledger with a unique ID making it impossible that the music is being downloaded, copied and shared by users that did not pay for it. On the registered musical content, metadata is stored holding information on the ownership and rights of the lyrics, composition, and artwork that can be accessed and validated by everyone in the network. This guarantees that only the creators and the connected humdrum parties get paid for the music. Since the ledger is not owned by a single entity, creators can register ownership of their work without the need of third parties (Dickson 2016).

Besides this, the technology introduced smart contracts. These contracts can provide a more efficient way to administer royalties. This technology allows music royalties to be paid instantly to composers and performers without the need to pass through intermediaries. Revenue gained from a stream or download is automatically distributed according to the pre-determined splits between the parties involved (O'Dair et al. 2016).

### *2.3 Themes related to music intermediation*

#### *2.3.1 Diversity*

It is already shortly mentioned, but intermediaries, especially when they are not-for-profit have the tasks to preserve diversity. Commercial intermediaries only perform that task to a certain extent since their main purpose is to generate revenue. However, since the digitalization the focus has been put more on the established, successful artists, the so called superstars which limited the diversity of the music market. This phenomenon is present in every intermediary, from record companies to stores.

Independent record companies are the ones to stimulate diversity by introducing new artists and genres. However, the majors created a system of buying and incorporating independent labels to be able to respond to technological developments and shifts in tastes. Thus, now the majors are playing a bigger role in providing diversity in the music industry as well since they own a variety of labels and divisions. In some countries the government makes arrangements with record companies and radio stations to stimulate diversity. For major companies to create an office abroad, they have to invest a certain percentage in the local artists. Radio stations, especially the public ones, also have directives to mix Anglo-American music and artists with a certain amount of local artists (Anderton et al 2013). Since



the digitalization, new intermediaries like streaming services and music blogs are the ones who are key in preserving diversity in the music industry.

Peterson and Berger (1996) argued that periods of corporate concentration and de-concentration is correlated to periods of homogeneity and diversity in music. Their research pointed out that when there is a high corporate concentration, thus that majors dominated the market, this was reflected into a reduced diversity in the music charts. In periods that independent record companies gained increasing market share, the diversity of genre and artists in the charts was increased. Due to the large investments of major record companies in artists, they will decrease their risk by investing in already successful genres and artists. Independent companies on the other hand are closer to the consumer and notice the demand in the market for new genres. Independents are willing to take a higher risk on demand uncertainty.

However, Lopes (1992) researched the singles and albums charts in the 1980s and did not find a correlation between market concentration and homogeneity. His research showed a corporate strategy of buying up independent companies or their artists when they gained market share. Thus, major companies are incorporating innovative record labels to increase their market share and diversity of roster.

Commercial radio stations are formatted according to genre, extending the diversity of the radio industry, but decreasing the diversity within a station. For record labels and artists to enjoy more success cross overs have become popular since they can receive airtime on more than one radio format. Next to the commercial radio stations, there are also noncommercial radio networks which receive funding from sponsorships, grants and donations. These non-commercial radio stations support underrepresented genres and local artists.

On a retail level, the amount of new music supplied is overwhelming for consumers in order to discover new artists. Consumers therefore tend to listen to the artists and music that is broadly presented in the media. Online retailers help consumers broaden their music taste and discover new artist by recommendation systems. According to music to which the consumer searched, other possible matches are presented to the consumer.

### *2.3.2 Reintermediation or disintermediation?*

McQuail (2005) explains in his research how the role of intermediaries has changed in relation to the increasing practice of the internet in the circulation of cultural products. Before

the internet was widely used, there were two gatekeepers in the music industry on the production side: labels and publishers; and there were a couple of gatekeepers on the distribution side as radio, music television channels and trade magazines. If an artist could not get both the production and distribution intermediary as their support, a successful career was unlikely to be established (Chernofsky 2016). The internet enabled the access to global cultural resources, without relying on gatekeepers that first were able to control and restrict the flow of cultural products in the traditional distribution channels. McQuail states that to some extent the hierarchies have been broken down by the internet. However, he stresses that this is really only to some extent since access is not entirely open and uncontrolled. For an artist to break through, still some gates need to be passed, the gatekeepers are only less clearly defined and identifiable (Rutter 2016).

Even after 18 years, academics still have diverse opinions about the impact of the Internet on the music industry regarding artists, intermediaries and consumers. Although the opinions of academics are more nuanced in comparison to what is published on news sites and blogs, there is no consensus on the impact. Some argue that the music supervisors at publishers are the new A&R managers of record labels. These supervisors select music for films, tv shows, commercials and videogames. Most of the music used for these projects come from unsigned artists who are discovered through the use of their music in media. Others argues that blogs are the new A&R managers (Chernofsy 2016). Since articles are written from different perspectives, this section will focus on the main viewpoints represented in academic literature (Galuszka 2015).

Fox (2004) and McLeod (2005) argue that the Internet caused a more equal distribution of power. McLeod stresses that “technological changes do threaten to help break the music monopoly that has existed for a century” (p. 530-531). By this is meant that the domination of the major record companies can be diminished by independent labels and artists who use the Internet effectively to make direct relations with their consumers. McLeod argues that the earnings of artists without the use of intermediaries will be higher, even though the sales of records will decrease. Fox (2004) argues that disintermediation has a positive influence on the music industry regarding the competition. This statement focusses on intermediaries who are concerned with distribution, lower distribution costs will lead to higher earnings to artists. Both Fox (2004) and McLeod (2005) are correct to stress that the structure of power in the music industry had shifted towards independent labels and musicians since it has become easier to spread music to listeners than it was before the Internet. Nevertheless, disintermediation has never occurred. Intermediaries are still

important in the music industry after the introduction of the Internet. The number of intermediaries has not become smaller but has only grown since new intermediaries joined the market.

Anderson (2006) agrees that there has been a change in the position of intermediaries. He sees the traditional intermediaries as being the ‘pre-filters’ in the past. These gatekeepers decided who was presented to an audience, this decision was made before the music was produced and distributed. The distribution channels being the ‘post-filters’. In the present recorded music industry, the traditional intermediaries function as ‘post-filters’ since music is often made available online for judgement by consumers and new distribution channels like blogs and Spotify playlists. Deciding for the traditional intermediaries in which music to invest. As EMI’s CEO Roger Faxon puts it: “Major record labels, if they ever were, are no longer the gatekeepers” (Chernofsky 2016). Thus, in today’s industry, the major record labels are important intermediaries, but they do not function as gatekeepers. Artists have to appeal to smaller gatekeepers like music blogs and independent labels, before they gain attention from majors to take their career to the next level. Intermediaries are still important, only their role as gatekeeper has been diminished since they started to focus on established artists to reduce the risk of losing their investments. However, the digitalization also made it easier for intermediaries to access the industry. This resulted in the founding of multiple influential music blogs, YouTube channels and Spotify playlists that gained a reputation of a gatekeeper (Chernofsky 2016) and are turning labels into data companies who look at streaming services to decide which new artists to sign. This turns streaming services not only as an important player in the industry for music to get heard but also for artists to get signed. Looking to it like this, they are already more influential than record labels ever where, being the gatekeeper for artists and consumers (Chernofsky 2016).

To stay valuable to the industry, record labels have acquired new roles and strengthened other roles. Nowadays, record labels are key players in the marketing and promotion of music. To fulfill the preferences of consumers, they need to make sure that the music is available on various online distribution platforms and on popular radio channels (Hviid et al. 2017). So, beginning artists use new intermediaries to create a buzz (Scott 2012) and other platforms to produce, release and sell their music online like Bandcamp. Music sites like Pitchfork and other major music blogs have more influence over the discovery of artists than an A&R manager at a large record company. Gatekeeping is nowadays done from the bottom up than vice versa. “There will always be filters for talent, it’s just that they’ve shifted positions. Talent always rises to the top. The only thing that has changed is that the

scouts are now from Pitchfork and Stereogum instead of Interscope and EMI” (Rogers 2010). With all this new online music services, the recording industry has become more diversified and the competition in the market has increased (Hviid et al. 2017).

This perspective is shared by O’Dair and Beaven (2017). They believe that intermediaries will always be of importance since they make sure artists get the best deals. Besides, all artists would be forced to the DIY-model when disintermediation would happen, this is not likely to occur. The tasks currently done by record companies like distribution and promotion, are not as successfully and efficiently done by artists since they lack the expertise, finance and network. Last but not least, some artists are unable or unwilling to manage the business side of their career and will sign to third parties (O’Dair and Beaven 2017). Hence, intermediaries play an important role in allowing artists to focus on the creative process and suffice them of a financially viable basis. To reach a critical mass, artists often need intermediaries, whether in the form of a record company or a new intermediary like a streaming service or music blog.

Thus, record labels have adapted to the digital music industry by focusing more on promotion and marketing, and new intermediaries emerged to make entry to the market lower like streaming services. Gatekeepers still determine what music is exposed to consumers (Chernofsky 2016). This suggest that changes in the position of intermediaries will be far-reaching, but it is not likely that disintermediation will be the outcome (Kretschmer 2001).

### **3. Methodology**

The research question ‘In what way has the interest regarding intermediaries in the music industry shifted among academics?’ will be answered mainly by means of qualitative content analysis combined with some quantitative data to give an overview of the themes and geographical focus of academic interest. This approach aims to analyze data, in this case academic articles, by systematic reading and coding of the texts. Qualitative methods will be applied to analyze the meaning of the content within the texts.

The research question will be answered with a comparative study, focusing on articles between 1975 up to 2000 and 2001 up to 2018. Through the database of Web of Science data from this period can be obtained. Since the limited data between 1975 and 1983, the focus of the analysis will be from the introduction of the first commercial CD in 1983. Thus this timeframe focuses on the period from the beginning of the CD till the use of illegal

download platforms like Napster which was introduced in 1999. The second timeframe, from 2001 till 2018 reflects a period of new ways to consume music as legal downloading and streaming were gaining popularity in the music industry. The second time frame starts not directly from the introduction of Napster and other digital file distributors since the first articles written on this phenomenon were published in 2001, this can be seen as a delayed Napster-effect.

The first step to conduct a content analysis is to define the source material. This includes which texts will be used for the study and how these texts were selected (Kloss 2010). The academic articles are gathered from Web of Science, the most recognized database of academic articles. Web of Science provides articles from 1975 till the present which have been published in renowned journals. Although, there are similar databases to Web of Science like Scopus and Google Scholar, all providing a multidisciplinary database, links to library holdings and enable users to export references, Web of Science is deemed to be the suitable database for this study. Even though Scopus and Google Scholar hold a greater number of articles, Web of Science is more critical in their selection process regarding the articles, looking at 'publication standards, expert judgements, regular appearances and quality of citation data' (Mikki 2009, p 42). Besides, compared to Google Scholar, it enables advanced, controlled searches due to its richly structured data. Search results in Google Scholars do not all match the search expression since its algorithm is developed to list best matches, including a lot of content that is not related to the search terms (Mikki 2009). Scopus, on the other hand, is a good alternative to Web of Science with a database of articles and books published from 1970. However, the dataset is created from search results of Web of Science because it has the strictest selection process which preserved the quality of this research.

The search terms used in Web of Science are listed in figure 1. These terms are a selection of associations to music intermediaries by the researcher and synonyms found on several thesauruses (Thesaurus.com, Oxforddictionaries.com, Collinsdictionary.com, Wordreference.com) and encyclopedia (Grove Music Online, Wikipedia.org, Britannica.com, Encyclopedia.com). The search terms in *italic* only led to duplicates of academic articles. Since there are quite some terms in *italic* it is safe to say that the saturation point was reached in the dataset. After completing all searches and filtering duplicated articles, the dataset listed 995 academic articles. Compared to the results without using refining terms this dataset is 61% of the entire list of results which exist out of 1557 articles. To make an even smaller selection, abstracts of 995 articles were read, after which the dataset was reduced to 255

articles. Criteria for inclusion and exclusion were predetermined to consciously select a set of sources that relate to the research question. Articles of which the abstract did mention something about intermediaries or the organization of the music industry were included.

Examples of exclusions of the dataset are:

- The article does not focus on the music industry, but on film, television, videogames or newspapers (e.g. DVD-audio specifications, Market Competition and Programming Diversity: A Study on the TV Market in Taiwan, Shall the sins of the son be visited upon the father? Video game manufacturer liability for violent video games)
- The article focusses on the live music industry (e.g. Recreational exposure to noise and its effects)
- Articles with research areas as metallurgical, computer science, telecommunications, biology and environmental studies without mentioning one of the inclusion factors (e.g. Parallel dynamic simulation of power-systems, Success for Nashville Wire products is giving customers what they want, Carbon Soundings: Greenhouse Gas Emissions)

The 255 articles were imported in Refworks create an overview by making separate maps for the time periods. Refworks has a function which enables to list the articles by author name, by date of publication and many other options which gives flexibility in analyzing them.

*Table 1: Search terms used in Web of Science database*

<b>Search term</b>	<b>Refining search term</b>	<b>Coverage</b>
Music industry/industries	Intermedia*	Intermediary/Intermediaries/Intermediation
Record(ing) industry/industries	Middlem*	Middleman/Middlemen
<i>Phonographic industry/industries</i>	Gatekeep*	Gatekeeper/Gatekeepers/Gatekeeping
	Mediat*	Mediator/Mediators/Mediation
	<i>Agent*</i>	<i>Agent/Agents</i>
	<i>Market maker*</i>	<i>Market maker/Market makers</i>

	Record label*	Record label/Record labels
	Record compan*	Record Company/Record companies
	<i>Warner</i>	
	<i>Sony</i>	
	<i>Universal Music</i>	
	Publish*	Publisher/Publishers/Publishing
	<i>Collecting societ*</i>	<i>Collecting society/Collecting Societies</i>
	<i>ASCAP</i>	
	<i>BMI</i>	
	Radio	
	<i>Station*</i>	<i>Station/Stations</i>
	DJ	
	<i>MTV</i>	
	CD	
	Download*	Download/Downloads/Downloading
	Peer-to-peer	
	Stream*	Stream/Streams/Streaming (services)
	<i>iTunes</i>	
	<i>Spotify</i>	
	<i>Store*</i>	<i>Store/Stores</i>
	Retailer*	Retailer/Retailers
	<i>Wholesal*</i>	<i>Wholesaler/Wholesalers/Wholesaling</i>
	<i>Press</i>	
	<i>Billboard</i>	
	Magazine*	Magazine/Magazines
	<i>Journalis*</i>	<i>Journalist/Journalists/Journalism</i>
	<i>Critic*</i>	<i>Critic/Critics/Criticism</i>
	<i>Platform*</i>	<i>Platform/Platforms</i>
	<i>Medium</i>	
	Outlet*	Outlet/Outlets
	Channel*	Channel/Channels/Channeling

	Manag*	Manager/Managers/ Managing/ Management
	Produc*	Producer/Producers/Production/Producing
	Distribut*	Distributor/Distributors/Distribution/ Distributing
	<i>A&amp;R</i>	
	<i>Plugger*</i>	<i>Plugger/Pluggers</i>

All articles were extensively read to count the different intermediaries mentioned in the text, to filter what was written about the intermediaries and to define the method that is used. According to Mayring (2003) there exist three basic forms of interpretation in qualitative content analysis. The first one that is mentioned is ‘summary’, meaning the reduction of the data. Besides this form of interpretation exists ‘explication’, meaning finding further material. And the third one is ‘structuring’, meaning filtering important aspects from the data (Kloss 2010). For this qualitative content analysis, ‘structuring’, thus filtering the relevant content out of the academic articles and analyze it using a coding scheme seems to be the most appropriate way. Themes will be developed in an inductive way, using the data to identify them. Nevertheless, some themes might also be found in a deductive way by using theoretical aspects in the development of the themes and determining them in advance. As is stressed by Silverman (2000), it is important to be aware of missing out on data when it does not seem to fit in the determined themes. Thus, when the categories, or so called themes are defined, it is crucial to watch out for data that seems important but does not fit the categories. The coding scheme is also used to calculate the share of topics and geographical focuses mentioned.

Next to this, the number of intermediaries mentioned per article is also registered in the coding scheme. The outcome of the results is divided by the number of articles per year to make the visualization of the data clearer.

## 4. Results and discussion

### 4.1 Search Results

For the analysis of the search results, data is retrieved in March 2018. To examine if there is an increasing interest in academic research for intermediaries or the music industry,



percentages per year are calculated as can be found in the table below. To identify the total number of published text per year several keywords were used in the search option in Web of Science, among ‘the’, ‘and’, ‘these’, ‘those’, ‘is’, ‘to’ and ‘it’. The search term ‘the’ had the biggest number of results and is used for the analysis since it comes the closest to the complete selection of academic articles on Web of Science as can be seen in table 2 where the results of the keywords with the highest numbers are depicted. The results of the other keywords were only a fraction of the results that ‘the’ provided.

*Table 2: Keywords used to gather complete dataset on Web of Science*

<b>Year</b>	<b>Number of articles ‘the’</b>	<b>Number of articles ‘to’</b>	<b>Number of articles ‘a’</b>
<b>1990</b>	214,915	77,697	131,220
<b>1995</b>	558,836	474,152	486,052
<b>2000</b>	695,504	603,112	619,479
<b>2005</b>	848,418	752,473	766,032
<b>2010</b>	1,096,483	991,051	996,132
<b>2015</b>	1,553,907	1,436,771	1,427,453
<b>Total of all years</b>	26,855,550	23,058,510	23,811,746

The list of results was filtered first by the keyword ‘intermediary’, a second time by using the keyword ‘music industry’ and finally by the term ‘music intermediary’. In table 3, the permilles for the period 1975 to 2000 are displayed.

*Table 3: Results of search results of ‘intermediary’, ‘music industry’ and ‘music intermediary’ in permilles, 1975-2000 and 2001-2018*

Year	Total amount for 'the'	Amount intermediary	Share of intermediary articles in ‰	Amount music industry	Share of music industry articles in ‰	Amount music intermediary	Share of music intermediary articles in ‰
<b>First timeframe</b>							
1975	5,839	-	-	1	0.171	-	-
1976	4,245	-	-	1	0.236	-	-
1977	1,262	-	-	-	-	-	-
1978	15,454	1	0.065	-	-	-	-
1979	105,752	10	0.095	-	-	-	-
1980	135,025	10	0.074	-	-	-	-
1981	145,772	14	0.096	1	0.007	-	-
1982	152,030	23	0.151	3	0.020	-	-
1983	157,706	16	0.101	2	0.013	-	-
1984	163,153	19	0.116	1	0.006	1	0.006
1985	166,270	9	0.054	4	0.024	-	-
1986	168,969	11	0.065	2	0.012	1	0.006
1987	173,396	13	0.075	-	-	-	-
1988	177,109	11	0.062	-	-	-	-
1989	183,725	19	0.103	2	0.011	1	0.005
1990	214,915	25	0.116	1	0.004	-	-
1991	455,203	235	0.516	3	0.007	1	0.002
1992	485,203	250	0.515	5	0.010	-	-
1993	499,762	279	0.558	10	0.020	1	0.002
1994	528,671	241	0.456	4	0.008	1	0.002
1995	558,855	294	0.526	9	0.016	-	-
1996	629,025	307	0.488	14	0.022	1	0.002
1997	644,035	332	0.515	16	0.025	2	0.003
1998	662,058	356	0.538	12	0.018	3	0.005
1999	678,964	354	0.521	18	0.027	4	0.006
2000	695,416	353	0.508	30	0.043	4	0.006
<b>Second timeframe</b>							
2001	702,559	364	0.518	21	0.030	1	0.001
2002	722,381	379	0.525	24	0.033	4	0.006
2003	762,777	390	0.511	31	0.041	3	0.004
2004	805,666	442	0.549	38	0.047	5	0.006
2005	848,434	464	0.547	47	0.055	9	0.011
2006	898,110	489	0.544	49	0.055	12	0.013
2007	936,765	461	0.492	70	0.075	7	0.007
2008	1,001,465	516	0.515	71	0.071	13	0.013
2009	1,047,223	565	0.540	77	0.074	11	0.011
2010	1,096,515	647	0.590	99	0.090	14	0.013
2011	1,175,425	661	0.562	86	0.073	12	0.010
2012	1,236,574	728	0.589	83	0.067	28	0.023
2013	1,314,253	761	0.579	110	0.084	19	0.014
2014	1,362,321	789	0.579	108	0.079	16	0.012
2015	1,553,095	1.009	0.650	135	0.087	35	0.023
2016	1,623,575	998	0.610	144	0.089	23	0.014
2017	1,663,168	1.114	0.670	173	0.104	38	0.023
2018	297,474	207	0.700	38	0.128	9	0.030

This analysis will focus on the data from 1983 since the results before that time are so limited that not much can be said about it. Besides, this is the year that the first commercial compact disc (CD) was introduced. When looking at the numbers, a decline of 0.006% is shown in 1985 regarding research on intermediaries. This might be explained by a shift in research focus. However, no clear evidence can be found for this or for other factors that might have

influenced this decline. Other years show an noticeable increase for research on intermediaries. The increase of 0.039% in 1991 might be related to the introduction of the first website which stimulated the functional use of the computer by intermediaries. This could also relate to the introduction of SoundScan and barcodes on product to digitally measure the success of a product by keeping track of sales and for example radio airplay for the music industry.

For the research regarding the music industry, the absence of research done on the music industry in 1987 and 1988 is a bit odd since this industry has a turbulent nature and also in the mid-1980s several developments were going on. As can be seen in figure 1, global music revenues began to climb steeply from this period. This was due to a combination of factors: the introduction of new genres (metal, hip hop, grunge), the introduction of a new sound carrier format (compact disc), and the consolidation of music retail and broadcasting which was focused on reaching mass audiences (Sinnreich 2013).

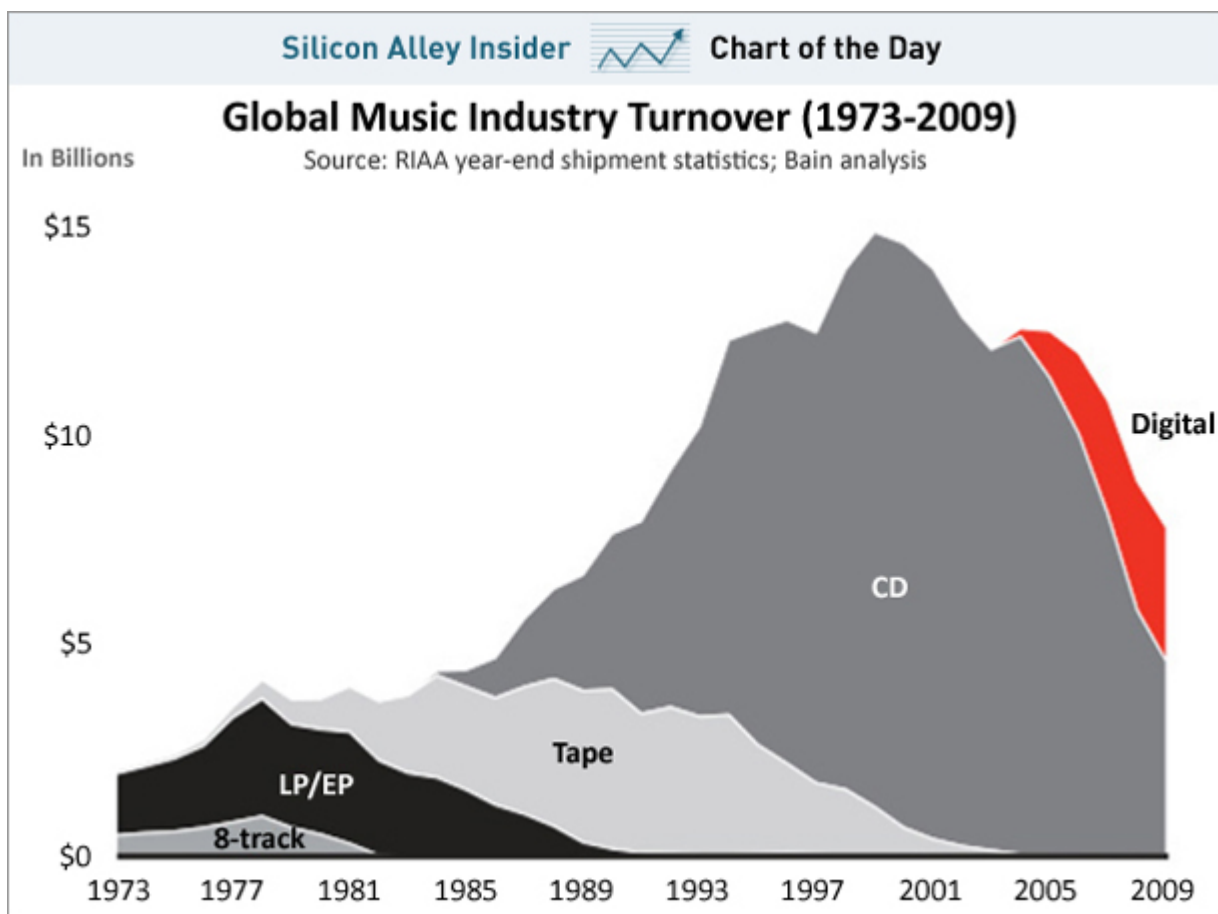


Figure 1: Global music turnover (Source: Yarrow 2011)

The compact disc, boosted new life into the recording industry after sales had decreased after the introduction of radio. Consumers updated their existing collections with this new format. The CD had been the most successful physical distribution format in music history, it dominated the market in a brief period of time. This format was first introduced to the market in 1983, and already by 1984 retailers saw that it would replace the other formats. It was also in the beginning-to-mid 1980s that music retail was broadened from specialized stores and regional chains in the 1970s to national and global music retailers like Tower Records, HMV and Virgin. It was also in the 1980s that MTV was launched and became the dominant factor in bringing new music to the public’s attention. In 1985 MTV was bought by Viacom which lead to the expansion of music television with channels as VH1, BET, and CMT (Sinnreich 2013).

The permilles of the search results of the same keywords as in table 2 for the period 2001 to 2018 can be found in table 3. Both in 2015 and 2017, an increase in research focused on intermediaries is found and can possibly be explained by technological innovations which stimulated entrepreneurship and short-term contracts for freelancers. A research performed by EMSI in 2012 which is presented in table 4, shows that since 2001, there has been an increase of 13% in the entertainment and sports sector in the United States. When looking specifically at the numbers of self-employment in this sector, the number has increased by 47% since 2001 and 10% compared to 2008.

*Table 4: Self-employment in the entertainment industry. Source: EMSI (Wright 2012)*

ENTERTAINMENT-RELATED JOBS (2001-2012)						
	2001	2008	2012	% Growth	% Growth	Avg. Hourly
	Jobs	Jobs	Jobs	Since 2001	Since 2008	Wage
Wage-and-Salary	492,960	549,333	556,765	13%	1%	\$19.32
Self-Employed & Extended Proprietors	512,383	685,773	755,137	47%	10%	\$17.24
Total	1,005,343	1,235,106	1,311,902	30%	6%	\$18.15

In 2015, the number of articles on intermediaries in the music industry doubled. This might be related to the big steps of the recorded music industry in its recovery from illegal downloading as streaming revenue increased. That streaming became the new way of

consuming music was confirmed in 2012, when streaming revenue increased by 40% to \$1.1 billion. In these years, the growth of streaming was remarkable, in the first half year of 2013 there was an increase of 24% compared to the first six months of 2012 according to a Nielson report (O'Malley Greenburg 2013). The increase of articles in 2015 and 2017 could also be a delayed effect of this new believe in recorded music. Comparing the percentages of the number of articles on intermediaries and the music industry, it can be concluded that the majority of the research on intermediaries is focused on intermediaries outside the music industry or on intermediaries in general.

#### *4.1.1 Research fields*

When searching on 'music industry' in Web of science for the period 1975-2000, the most occurring research fields are music, business economics, sociology, communication and engineering. Around a third of the articles in the dataset has multi-classifications and more than half (52%) of the classifications are part of the top five. Of the top five most occurring research fields, sociology is often mentioned in combination with literature and communication, in total 12 times of which half in combination with communication and the other half in combination with literature. Thus the results in the top five are biased since sociology and communication are mentioned more often since they are combined together. Engineering is also twelve times part of a multi-classification, mainly in combination with acoustics and computer science. Business economics is only three times mentioned in combination with another research field. It is no surprise that literature and acoustics are the biggest research fields in this dataset after the top five. Research in this timeframe focusses mainly on diversity and standardization of genres and artists, on the competition and incorporation of major record companies and independent record companies, on technological innovations, and of the distribution of music via radio, music television and other channels. Thus, the research fields reflect what academics deemed important in the music industry.

However, research fields which seem less fit in relation to the music industry are also presented in the top 25 research fields in for this search in Web of Science which are depicted in table 5. Among the surprising fields are social issues, theater, architecture, environmental sciences. Nevertheless, the number of articles connected to these topics are negligible. The number of articles on the music industry between 1975 and 2000 are too little to filter the less important research fields in a top 25.

Table 5: Top 25 research fields of search results 1975-2000 and 2001-2018

Research Areas 1975-2000	records	% of 156	Research Areas 2001-2018	records	% of 1450
MUSIC	38	24.359	BUSINESS ECONOMICS	383	26.414
BUSINESS ECONOMICS	21	13.462	MUSIC	251	17.310
SOCIOLOGY	21	13.462	COMMUNICATION	113	7.793
COMMUNICATION	14	8.974	SOCIOLOGY	107	7.379
ENGINEERING	13	8.333	COMPUTER SCIENCE	85	5.862
LITERATURE	13	8.333	ENGINEERING	80	5.517
ACOUSTICS	9	5.769	CULTURAL STUDIES	77	5.310
CULTURAL STUDIES	7	4.487	SOCIAL SCIENCES OTHER TOPICS	70	4.828
GEOGRAPHY	7	4.487	GEOGRAPHY	57	3.931
GOVERNMENT LAW	7	4.487	PSYCHOLOGY	51	3.517
ANTHROPOLOGY	6	3.846	ARTS HUMANITIES OTHER TOPICS	49	3.379
COMPUTER SCIENCE	6	3.846	GOVERNMENT LAW	47	3.241
ARTS HUMANITIES OTHER TOPICS	4	2.564	LITERATURE	42	2.897
PUBLIC ENVIRONMENTAL OCCUPATIONAL HEALTH	3	1.923	FILM RADIO TELEVISION	40	2.759
SOCIAL ISSUES	3	1.923	ASIAN STUDIES	39	2.690
SOCIAL SCIENCES OTHER TOPICS	3	1.923	INFORMATION SCIENCE LIBRARY SCIENCE	36	2.483

THEATER	3	1.923	ENVIRONMENTAL SCIENCES ECOLOGY	34	2.345
ARCHITECTURE	2	1.282	ANTHROPOLOGY	32	2.207
ART	2	1.282	OPERATIONS RESEARCH MANAGEMENT SCIENCE	31	2.138
EDUCATION EDUCATIONAL RESEARCH	2	1.282	EDUCATION EDUCATIONAL RESEARCH	30	2.069
ENVIRONMENTAL SCIENCES ECOLOGY	2	1.282	PUBLIC ADMINISTRATION	27	1.862
INFORMATION SCIENCE LIBRARY SCIENCE	2	1.282	ACOUSTICS	25	1.724
MATERIALS SCIENCE	2	1.282	HISTORY	25	1.724
MECHANICS	2	1.282	AREA STUDIES	23	1.586
PSYCHOLOGY	2	1.282	PUBLIC ENVIRONMENTAL OCCUPATIONAL HEALTH	22	1.517

For the years 2001-2018 the same was done. The top five most occurring research fields are business economics, music, communication, sociology and computer science. The six most occurring research fields are close to the top five in the previous timeframe. There is an increasing focus on psychology, social science and geography in this period. Where government and law was in the top 10 in 1975-2000, it declined two spots in this time period, which is remarkable since there were a lot of copyright issues due to technological innovations in the music industry. However, if multi-classification is taken into account this scheme might not be entirely representative. Of the search results of 2001-2018, 33 percent has multiple classifications. Of the 469 texts with multiple classification, almost 18% is classified with three or more research fields. The research fields mentioned in the top five are good for 61% of the multi-classified texts since 288 articles are classified together with another research field with a top five classification. Especially business economics, the

number one, is mentioned together 21 other research fields. Of which the majority is operations research and management science, social sciences, public administration, computer science and sociology, the latter two being also part of the top five. Communication is often classified in combination with cultural studies, film, radio and television, and sociology. Of this, the combination communication and sociology is most common, thus this explains that both are part of the top five. Thus, the research fields in the top five are often mentioned in combination with another research field, of which the other is often also part of the top five.

#### *4.1.2 VOS viewer*

Vos viewer is a software that is specifically developed to analyze and visualize bibliometric networks, also known as ‘science mapping’. Vos viewer is used in this study since it is a powerful approach to analyze a large set of bibliometric data, in this case focused on networks of co-occurrence relations between keywords (van Eck and Waltman 2014). Bibliographical data of the 995 academic texts listed in the table in Appendix 1 was downloaded from the Web of Science database. The tab-delimited format was used to export the full record of each text including the cited references. The data was downloaded in batches of 500 texts at a time due to limitations in exporting from Web of Science. The data covers the period 1975-2000. Bibliographical data was downloaded separately for each timeframe, thus for 1975-2000 and 2001-2018. Each circle in the visualization represents a term. The size of the term indicates how often a term is mentioned in the title or abstract of the publications of the dataset. If terms co-occur a lot, these are located close to each other in the network (van Eck and Waltman 2014).

Compared to other software tools to analyze and visualize bibliometric networks as CiteSpace and Sci<sup>2</sup>, VOSviewer is the only software that provides distance-based visualizations, which is useful for larger networks. The graph-based networks, which can be found in figure 5 and 6, exist out of nodes and edges. The graph-based approach is especially useful to analyze and visualize relatively small networks as is the case in this study. The nodes represent the keywords and the edges indicate the relation between the nodes. The distance between the nodes does not reflect their relatedness. VOSviewer also assigns the nodes to a cluster, these are indicated by colors (van Eck and Waltman 2014). VOS viewer is used for this research to understand the trend of research from past to present regarding intermediaries in the music industry. It is a tool to illustrate the evolution of research over



time.

For the time period 1975-2000 the terms are located in two clusters of an almost equal size. The terms in this visualization represent the interest of researchers in the period 1975-2000. The red cluster located on the left represents terms related to popular music itself, while the green cluster represents terms associated with the music industry. Among the terms in the red cluster on popular music are technology, organization, innovation, diversity, history, market and place. These terms are all represented as big as each other and thus are mentioned around the same amount of times in titles and abstracts. Innovation and diversity are closely located to each other, which means that these terms often co-occur in an abstract or title. In the green cluster, the term music industry, as well in the whole visualization, is the largest depicted. The terms practice and process are the ones most often mentioned in combination with this term. In the green cluster we also see the terms 'world' and 'tradition' which can be related to the terms innovation and diversity since there is a conflict of globalization and localization.

There are three clusters in the period from 2001-2018 of which two are of significant size. The red cluster on the left represents terms related to different aspects of culture. The terms around which most research is focused are culture, production, form, musician, medium, popular music, song, history and identity. What is interesting to notice is that in this cluster even places are mentioned. The main interest lies in the culture and popular music in Britain and Europe in general and the United States, this also resembles the largest part of the music industry. The terms closely connected to Europe are community, fan, youth and cultural industry which differs a lot from the interest around the United States where there is a focus on institution, power, entertainment industry and song. On the right, in the green cluster we find terms connected to consumers, focused on different ways to consume music. It is no surprise that terms like service, behavior, content, innovation, distribution, piracy and internet are often mentioned together. Especially new ways to distribute music are important in this cluster as we find terms like file sharing and publishing. The latter gained importance due to the increasing use of music in commercials, films, tv-series and videogames. However, it is odd that streaming services/platforms or streaming in general is not mentioned in this cluster since these distributors are of significance in this time frame and would be expected to generate interest among scholars. The small blue cluster on the bottom mainly represents the traditional intermediaries, which in abstract and titles are often mentioned with the term 'record'. To the look of the size in which these terms are represented it does seem that these intermediaries had become of less interest, which of course still says nothing on a real shift in

power among the traditional and new intermediaries.

Comparing the visualizations in figures 2 and 3, it shows that the terms used in titles and abstract of academic publications became more varied, representing an increase in research regarding music intermediaries, and shifted from the traditional intermediaries in the music industry to digital music and culture. Thus, the differences between the visualizations are remarkable, looking at the clusters and the level of detail (van Eck and Waltman 2014, p.23).

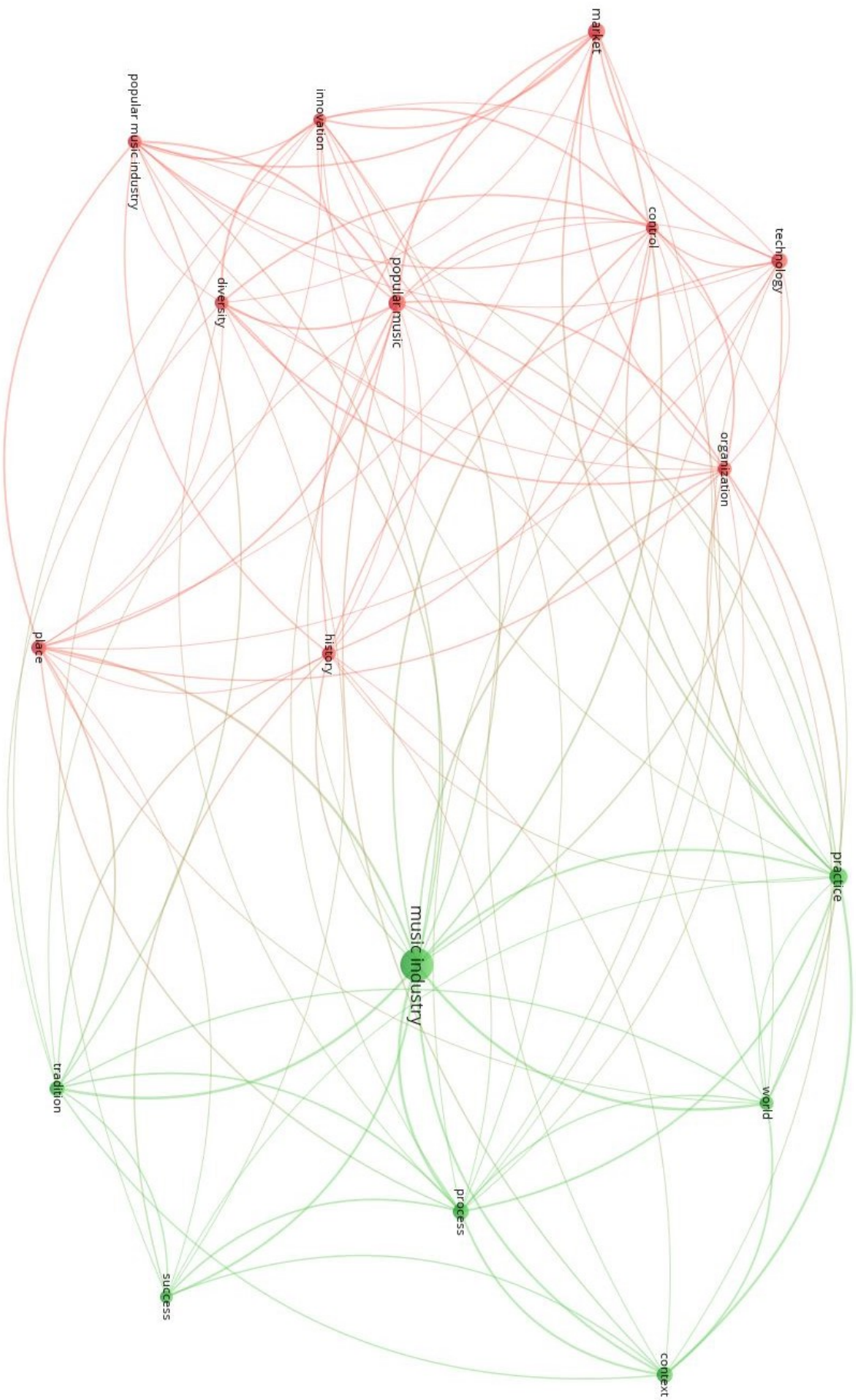


Figure 2: Bibliographic network 1975-2000

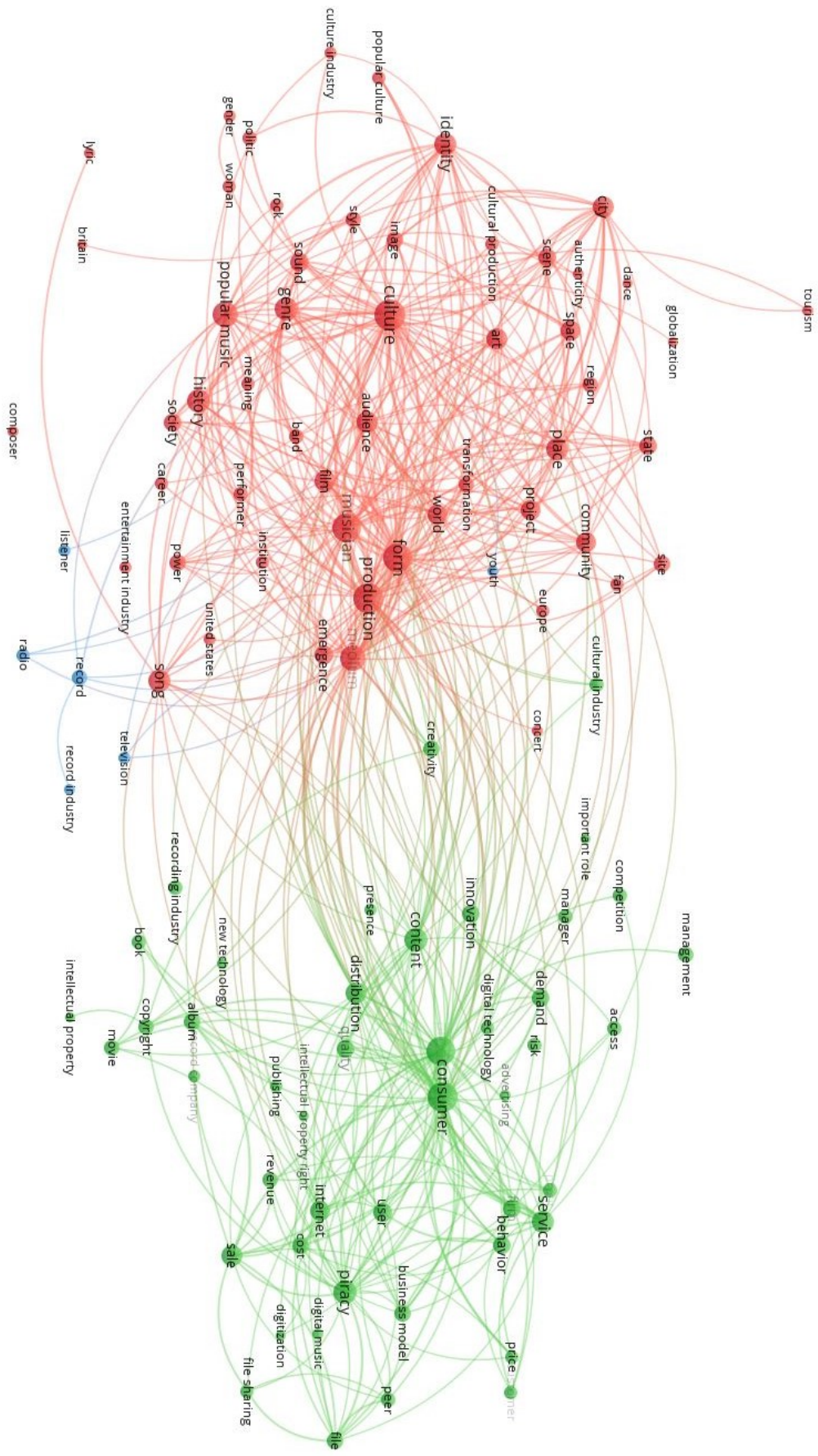


Figure 3: Bibliographic network 2001-2018

#### 4.2 Analysis of academic articles

In table 6, the number of articles of the selected dataset are displayed per year.

Table 6: Time trend on the articles on music intermediaries

<b>Year</b>	<b>Number of articles</b>	<b>Year</b>	<b>Number of articles</b>	<b>Year</b>	<b>Number of articles</b>
1983	1	1995	2	2007	15
1984	-	1996	7	2008	12
1985	1	1997	5	2009	10
1986	-	1998	4	2010	17
1987	-	1999	7	2011	8
1988	-	2000	16	2012	13
1989	-	2001	7	2013	15
1990	-	2002	6	2014	9
1991	-	2003	6	2015	12
1992	3	2004	9	2016	14
1993	3	2005	14	2017	16
1994	3	2006	13	2018	6

#### Background of articles from 1975-2000

Regarding the data which are presented below in table 7 and visualized in figure 4, diversity the most occurring topic in the texts. With the years there is a more diverse set of intermediaries mentioned in the articles, this will even increase more in the second timeframe.

The music industry exists mainly out of the United States and European market. To specify it even more, it mostly exist out of Anglo-American music and artists. It is not surprising that this is also reflected in the academic interest of scholars as is depicted in figure 4 . Of the part of Western and Eastern Europe together, 69% is focused on the music industry in the UK.

Table 7: Geographical focus of articles between 1975 and 2000

Geographical focus	Share of articles	Percentage of dataset
USA	23	43
Western Europe	14	26
Eastern Europe	2	4
Africa	1	2
Asia	2	4
Australia	3	6
Not specified	9	17

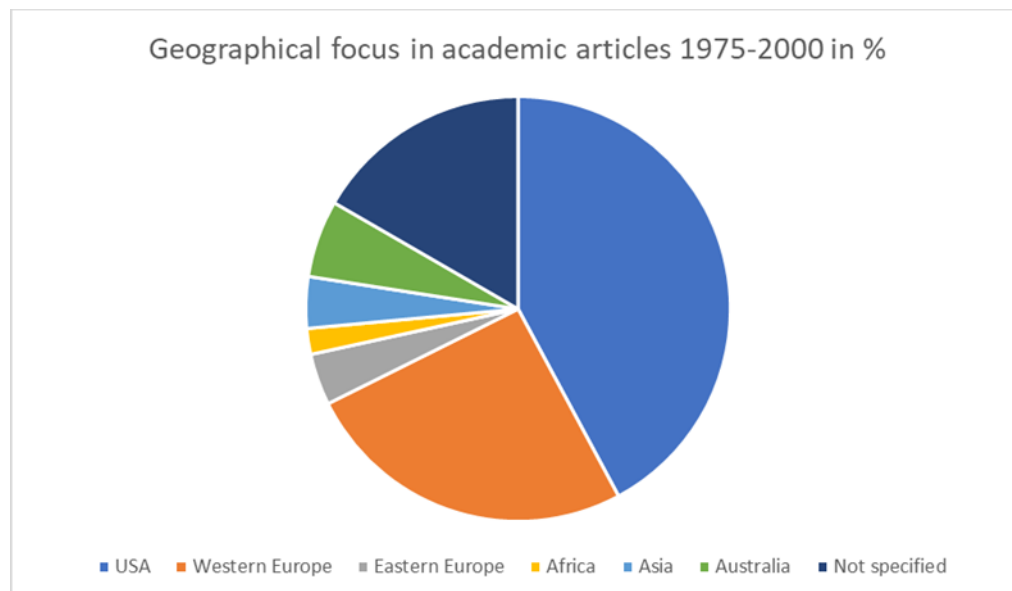


Figure 4: Visualization of data presented in table 7

Figure 5, regarding the themes, also represent this unequal division of geographical interest. 25 percent of the share of the diversity theme is focused on local music, this is only 17% of the complete dataset of the text between 1975 and 2000 which is a relatively small number. Thus, although diversity is the most occurring theme in the dataset, only a fraction of the texts is related to local music scenes.

The influence of competition between independent record companies and the majors are the largest part of the share of diversity and can be connected to innovation of genre and creativity by independent labels. As is argued by Burnett (1992) independent record labels determine the form and content of the music industry and the majors the organization of it.

Besides competition between independent and major record companies, competition in the radio industry is also related to diversity. Stations attract listeners and advertisers by playing the music that record companies believe are hits. This leads to standardization and commercialization of the music industry. The subtopic organizational competition within the diversity theme means the use of standardized or diverse music in order to compete in the industry.

Competition is the main share of the theme ‘organization’ and holds the competition of market share and the power relations which determine the chances of a competitor. Other topics related to organization are artistic control, diversity and place. In this case, diversity is not focused on musical diversity but on the differentiation of the company by their identity and the variety of race and gender among employees. The other themes (artistic control and place) are hardly represented in the dataset but will probably will become more important after the launch of peer-to-peer file sharing networks since that will enable artists to release music without traditional intermediation.

In order for intermediaries to compete, the consumer plays a vital role. Two texts in this timeframe were focused on consumption. One researched the motivation of consumers to buy music and the other on making meaning to consumers. With the introduction of peer-to-peer file sharing networks, the service demand of the consumer became more important since it was a good substitute for buying records and listening to radio.

*Table 8: Themes in articles between 1975 and 2000*

<b>Theme</b>	<b>Share of articles</b>	<b>Percentage of dataset</b>
<b>Diversity</b>	<b>36</b>	<b>68</b>
Local music	9	17
Commercialization/standardization	7	13
Organizational competition	12	22
Genre/ innovation	8	16
<b>Organization</b>	<b>12</b>	<b>23</b>
Artist/intermediary relation	1	2
Competition	8	15
Diversity (company identity, gender, race)	2	4

Place/concentration	1	2
<b>Consumption</b>	<b>2</b>	<b>4</b>
Motivation	1	2
Value creation	1	2

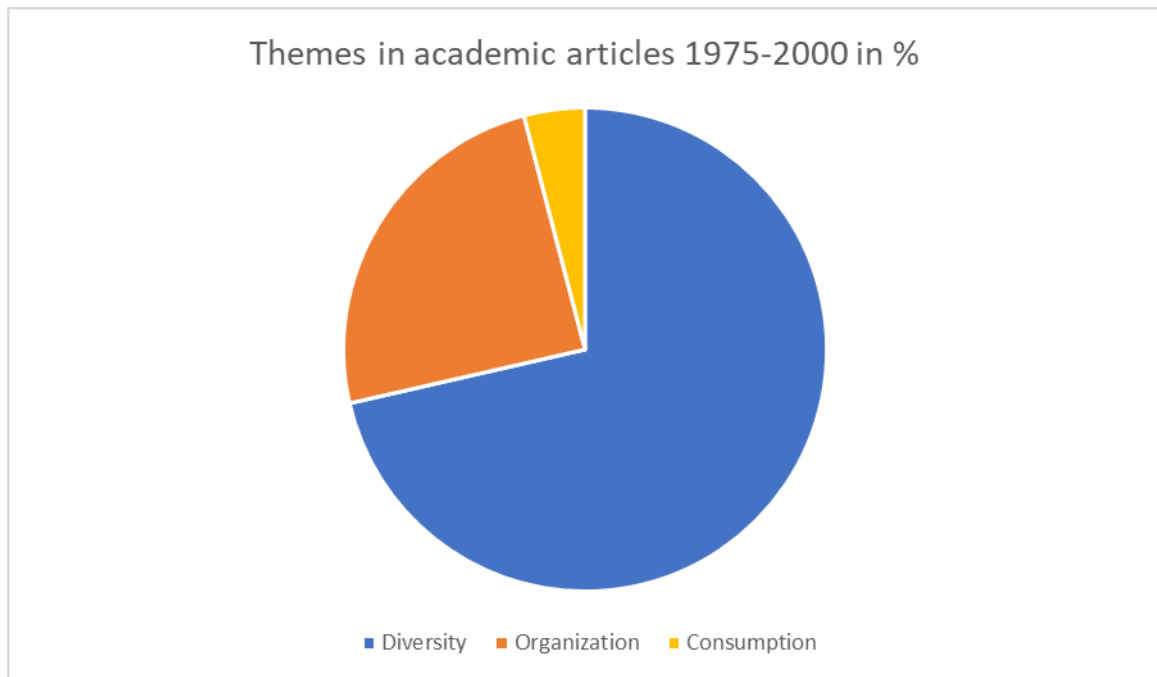


Figure 5: Visualization of data presented in table 8

Figure 6 depicts the number of intermediaries mentioned in the articles per year. All intermediaries were counted and then divided by the amount of articles available of that year to keep the bar chart clearer. Looking at the graph, record companies are most written about in academic articles and the interest in publishers is decreasing fast and staying small. Many of the positions within intermediary institutions only gain interest of academics at the end of the timeframe, apart from A&R managers and DJ's which are probably the most recognized intermediary functions. Coming closer to the end of the century, articles not only focus mainly on the institutions but are also discussing the positions within the music industry that play an important role in shaping it.

The interest in music television decreases rapidly after 1993, making trade magazines a more stable factor in the music industry, or at least more interesting to scholars. From 1999, the first online music retailers are mentioned in academic articles, this did not represent a threat to record companies since these online distributors still sold physical recordings. Connected to this, it is remarkable that there is not an increase interest in distributors near the



end of the century. Not only are distributors threatened by digital distribution, the role of this intermediary changed a lot as well. It became less about logistics and more about administrative activities. The increase of the number of times that managers are mentioned in articles might be related to digitalization since it stimulated the DIY-movement by providing cheap recording equipment and software which were often brought to a small public by a manager than a record company.

Table 9: Number of intermediaries counted in academic articles between 1975-2000 divided by number of articles per year

Year	Publisher	Record company	Radio	Programmer	Music television	Magazine	Retailer (physical)	Retailer (online)	Distributor	DJ	A&R	Collecting society	Manager	Pluggger
1983	64													
1985	27													
1992	4	111	19		13	8	6		18	1				
1993	1	46	9		10	6	2		1	1	1			
1994	19	5	3		1	3						1		
1995		50	1			4			6		1		1	
1996	3	14	32			1	2		2	1	1			
1997	1	84	8		3	7	20		6	1	1			
1998	1	87	2		1	3	2		2	5	1		1	4
1999	7	110	14	1	1	4	7		5	1	2	2	1	1
2000	1	21	40	1	1	10	4	1	1	2	1		1	1

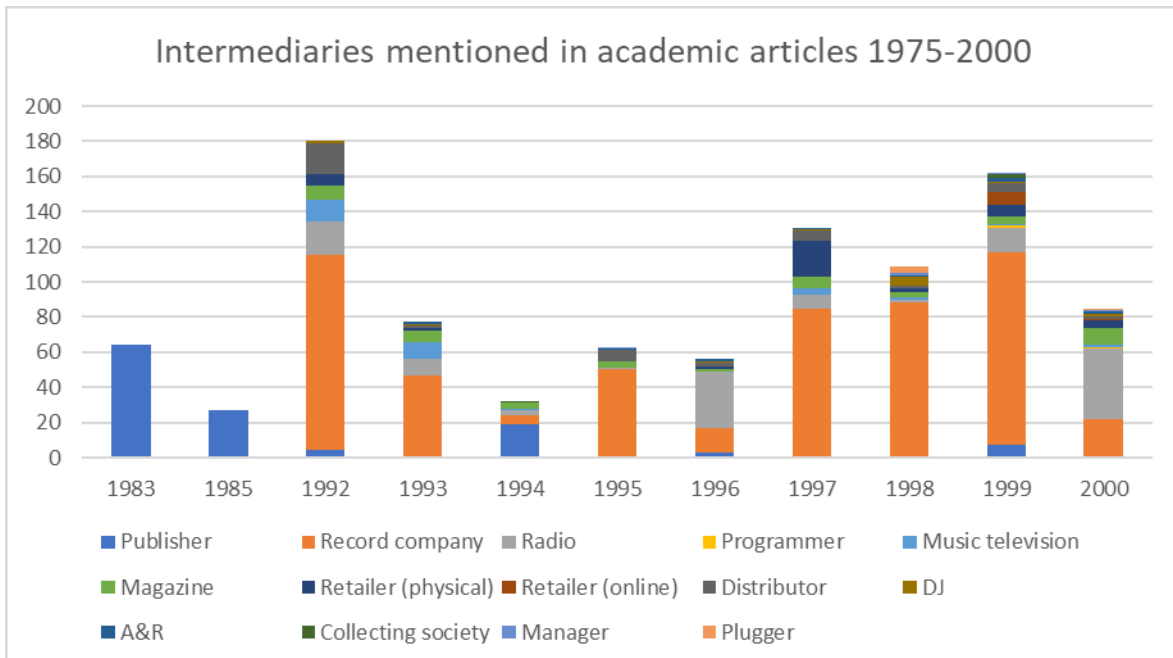


Figure 6: Visualization of number of intermediaries mentioned in academic articles between 1975 and 2000

In the second timeframe, the main focus is still on the USA and Western Europe as can be seen in table 10 and figure 7. However, as the European share was in the earlier timeframe mainly focused on the UK, this is now more spread between other European countries like Spain, Portugal, France, Sweden and Ireland. Asia gained academic interest, this was the most noticeable in 2013 in which several articles were written about the increasing popularity and globalization of K-pop. The geographical focus has slightly increased in diversity since some text also cover other parts of North America than the USA, like Canada and there was an interest in the music industry in New Zealand. Next to North America and New Zealand, the music industry in Eastern Europe and Africa are still largely unexplored.

*Table 10: Geographical focus of academic articles between 2001-2018*

<b>Geographical focus</b>	<b>Share of geographies mentioned</b>	<b>Percentage of geographies mentioned</b>
<b>USA</b>	74	34
<b>North America</b>	3	1
<b>Western Europe</b>	40	18
<b>Eastern Europe</b>	1	1
<b>Africa</b>	1	1
<b>Asia</b>	10	5
<b>Australia</b>	9	4
<b>New Zealand</b>	1	1
<b>Not specified</b>	81	36

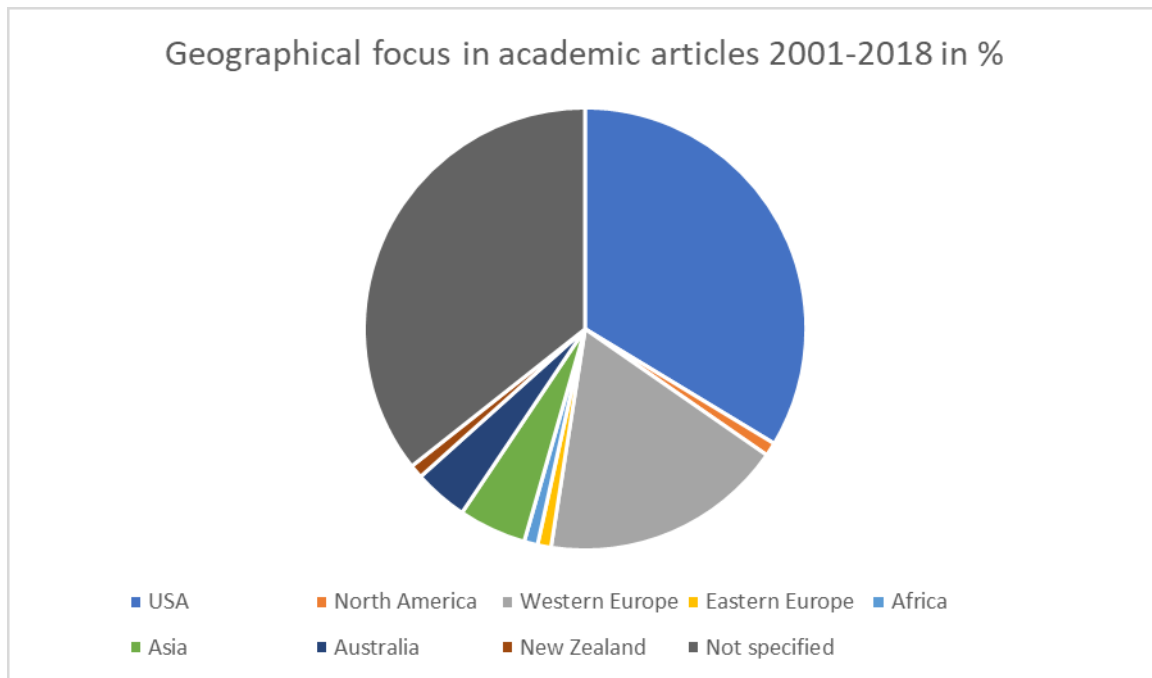


Figure 7: Visualization of geographical focus of articles between 2001-2018

There has been a shift in interest in theme between the first timeframe which mainly focused on diversity and the current timeframe which shows an enormous increase in interest in competition as is presented in table 11 and figure 8. This shift is not so surprising looking at the developments in the music industry in this timeframe. The digitalization of music lead to new entrants of intermediaries which increased the competition. However, if we take into account the long tail theory of Anderson (2006), it argues that these new intermediaries are closely related to the diversity of music consumed. Nevertheless, the diversity theme covers also a significant share of the dataset. The use of diversity to compete with other companies in the industry is still the largest sub theme which has thus not changed compared to the first timeframe.

It is noticeable that artist/intermediary relations did not receive more scholarly attention due to the increased bargaining power of artists enabled by multiple DIY-platforms. However, the position of intermediaries is still significantly stronger than the position of artists since artists lack finances, expertise and a valuable network. Besides, artist often do not want to focus on the business aspects of making music and rather spend more time creating and performing music.

Two articles found it worth discussing the discourse of the music industry which changed due to all the developments taking place in a relatively short amount of time. The

articles that discuss the consumption of music were mainly focused on consumer behavior. A relevant topic since the introduction of P2P file-sharing networks.

*Table 11: Themes in articles between 1975 and 2000*

<b>Theme</b>	<b>Share of articles</b>	<b>Percentage of dataset</b>
<b>Diversity</b>	<b>66</b>	<b>33</b>
Local music	16	8
Commercialization/standardization	13	6
Organizational competition	30	15
Genre/ innovation	7	4
<b>Organization</b>	<b>117</b>	<b>58</b>
Artist/ intermediary relation	6	3
Competition	94	47
Diversity (company identity, gender, race)	3	2
Place/concentration	5	2
Discourse	2	1
Value creation	7	3
<b>Consumption</b>	<b>18</b>	<b>9</b>
Motivation	1	1
Value creation	4	2
Behavior	13	6

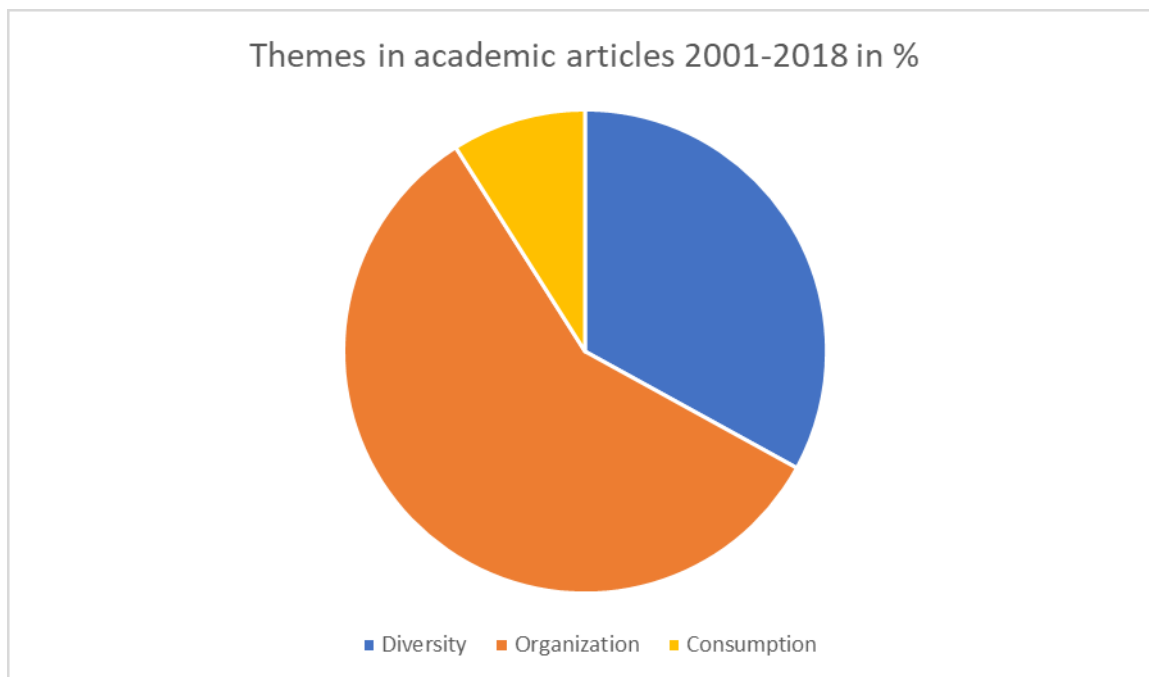


Figure 8: Visualization of data presented in table 11 regarding themes in academic articles between 2001-2018

The number of times that record companies is mentioned in articles is slowly demining, with some exceptions of years. Still, this traditional intermediary enjoys a large share compared to the other intermediaries. In the graph is shown that record companies increasingly split their share with the mentioning of online music platforms like streaming services, legal download stored and P2P-networks. From 2005 on, a diminished mention of P2P file-sharing networks is presented, which might be explained by the introduction of new business models joining the music industry. The iTunes store for example was launched in 2003 and decreased the threat and popularity of illegal downloading.

Table 12: Number of intermediaries counted in academic articles between 2001-2018 divided by number of articles per year

Year	Publisher	Record company	Radio	Programmer	Music television	Magazine	Retailer (physical)	Retailer (online)	Distributor	DJ	A&R	Collecting society	Manager	Pluggger	Legal download store	Streaming service	Peer-to-peer network	Critic	Blog	Blockchain
2001	3	71	17	8	1	3	7	2	1	1	3	1	1	1	4	18	1			
2002	1	42	8		2	3	6	2	3	1	1	1				16				
2003	1	30	7		1	1	4	13	3	3	1	2	1			20	1			
2004	1	28	26	1	1	2	3	1	2	1	1	1	1		1	3	24			
2005	6	51	4	1	2	2	16	5	2	1	2	1	1		2	2	21	1	1	
2006	4	42	4	2	1	9	7	2	3		3		1		4		5	4		
2007	1	21	19	1	1	5	5	1	3	4	1		1	1	2	2	3	1	1	
2008	1	19	5	1	2	1	8	1	1	1	1	1	1	2	2	4	4			1
2009	5	29	3		1	3	1	2	1	1	3	1	1		1	4	9	1	6	
2010	4	47	11		1	3	3	2	1	1	1	6	1	1	2	1	1	7	1	
2011	6	19	40	5		18	3		1	4	2	1	1	3	1	1		1	1	
2012	1	30	9	1	1	1	4	1	1	2	1		1		3	1	2	1	6	
2013	1	38	7	1	1	3	9	2	3	1	1		1		2	3	2	1	6	
2014	1	21	8			3	2		1	1		1	6		2	6	1	1	7	
2015	3	41	4			7	2	2	3				7	1	2	15	4	3	2	
2016	4	28	9	1	1	1	9	5	10	1	3		8	1	7	15	2		1	
2017	5	24	7	2	4	3	6	1	3	1	1		3		1	10	1	1	5	3
2018	3	19	2	1			1	3	2		1	1	1		7	18	10			

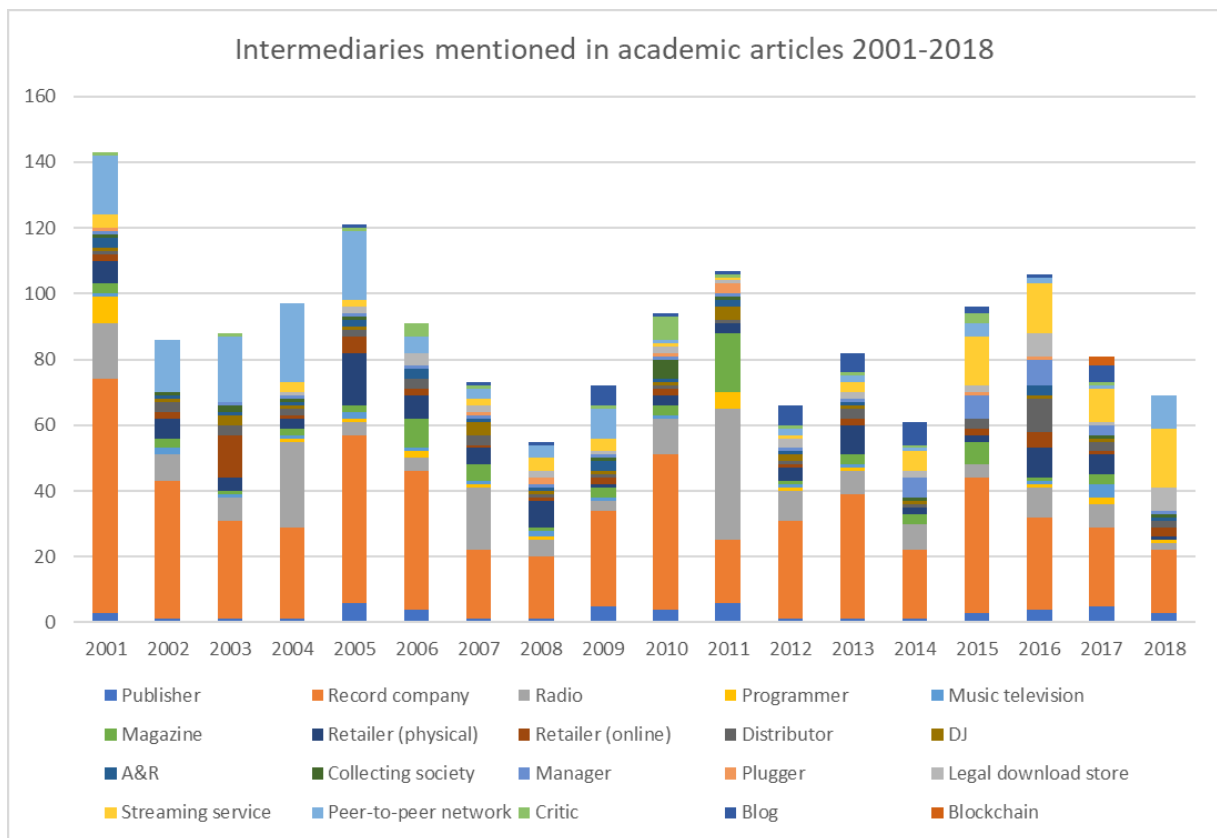


Figure 9: Visualization of number of intermediaries counted in academic articles between 2001-2018 divided by number of articles per year

### 4.3 Analysis of findings of articles

#### 4.3.1 Diversity

Diversity was a theme that is widely discussed in both timeframes mainly regarding the influence on it by major record companies. The diversity of music is related to market concentration and influence on the market. Peterson and Berger (1996) stated that there is a relation between market concentration and diversity of music. The more concentrated the market, the less diversity was found in the hit charts according to them. However, Burnett (1992) argues that there is not a negative relationship between the concentration of record companies and the diversity of music. This is supported by Lopes (1992) who describes that diversity of music is more impacted by the specific organization of the industry and the structure of the market than by the degree of concentration. According to Alexander (2002) is the relationship between diversity of music and organizational concentration nonmonotonic,

meaning that both high and low levels of concentration leads to a lessened variety and that the highest level of variety can only be promoted by a moderately concentrated music industry.

The introduction of SoundScan would affect the hit charts since sales would now be officially registered. Before major record companies payed retailers and radio stations to increase product exposure and sales. However, it is unlikely that something really changed. Major record companies can still make the biggest investments in marketing to gather a prominent place for their products in stores and to buy airtime (McCourt and Rothenbuhler 1997). Thus this affected diversity in the music industry but not necessarily the influence of the majors.

Capling (1996) describes in his research that governments hold some power over major record companies concerning diversity. Governments may demand certain conditions when majors want to settle in a country. For example in Australia offices of majors were only welcome when they promised to support and develop the local music scene as well to some extent.

#### *4.3.2 Disintermediation*

The developments related to the digitalization of music opened the discussion on disintermediation. No academic articles argued that these changes in the industry would lead to disintermediation, however, it was argued that the power and influence of some intermediaries would change or be diminished this was mostly focused on the decrease of dominance of major record labels but also some other intermediaries might notice changes in their position.

Several scholars agree that the internet has a significant impact on the supply chain of music and the dominance of major record companies. According to Graham et al (2004), the future of major record companies looks a bit less positive than the future for artists and consumers. Khouja and Wang (2010) also believe that the internet is eroding the power of record labels since it enables artists to promote themselves. However, even before the digitalization it was argued that majors got more competition. Back in the 1930s, radio not only diminished the importance of disc as a mass medium, but also seriously competed with the record company as a major musical institution (Racy 1976).

The digitalization of music has challenged the major record companies to keep their

dominance over the market since production and distribution costs have radically dropped since the 1990s. This has enabled independent labels and DIY-artists to put their music on the market without the help of major record companies and radio stations (McLeod 2005). Mitchell (2007) argues that some niche genres, like Australian hip hop, is able to exist without the help of the bigger players in the music industry. It established itself from the ground up with the help of community radio stations and music blogs to promote the music. Young and Collins (2010) also suggest that the industry is less structured from the top down, but does not believe in disintermediation. Small intermediaries play an important role in launching artists careers. Major record companies, who own the biggest share of the music market, are still investing in winning the approval of these smaller intermediaries (Balaji 2012). Anderson (2006) stresses the same idea, stating that record companies were the pre-filters of the music industry and are now turned into the post-filters since the smaller intermediaries serve as the pre-filter. These smaller intermediaries determine which artists are signed to record labels (Chernofksy 2016).

Music journalists are also still relevant in the music industry. Local music publications are important for the promotion of local music and the scene around it. Sinkovich et al (2013) also stresses the influence of online music blog Pitchfork for the launch of an artist's career and the forming of consumer tastes. However, in the research of Dewan et al (2014) is shown that buzz created by blogs does not or negatively affect the sales of recorded music and that the ability of sampling music is more important for sales. Besides this, music journalists are pressured by the major recording companies to cover national acts over local artists (Nunes 2010). Still, it is argued by Anderton et al (2013) that the importance of critics and journalists had risen since the introduction of the internet.

However this view is criticized by multiple researchers. Burke (1997) stresses that musicians rather sign by a record company than setting up their own label. When artists do choose to start their own label this is often from 'push' factors instead of 'pull' factors. New technologies altered the ways in which artists can reach the market, independently from a record company. However, record companies still have valuable resources to offer (Clemons and Lang 2002). This is supported by Galuszka et al (2017) in their research on crowdfunding. They argue that the power of crowdfunding is limited in enabling artists to enter the music industry without the support of a record company, due to this new way of generating finances for releases. Artists might be able to finance the production of their music themselves, but they have difficulties with the promotion of the music. Artists and their funders miss the power, network and the expertise of record companies. Sargent (2009)



stresses the fact that online social networks and digital file sharing are enabling artist to reach an audience, however have trouble to cultivate a broader audience with these resources. Regarding Colista and Leshner (1998), mass communication determines the music industry and thus is critical when an artist wants to break through. McLean et al (2010) also confirm that the opportunities offered by the internet to artists is limited since the ultimate power lies in publications by mass media instead of independent 'narrowcast'.

To fight the developments which are threatening the profitability of established organizations, they try new business models to re-stabilize (Leyshon 2001). For example, record labels are nowadays using 360 degrees deals to collect more profits and are exploiting the artists' brand names (Galuszka et al 2015). The use of 360 degrees deals, in which record companies also receive income from merchandising and publishing is reflecting a shift the balance of power towards the live music industry. Nevertheless, this approach does help record companies to face the challenges of the recorded music industry (Marshall 2013).

Not only have majors promotional influence over artists, they also put independent labels into a certain position in order to sustain. Independent record companies are pressured to work against their believes by their reliance on crossover hits and compilation albums, their reliance on other corporations in the music business and they are forced to the standard ways of dealing with risks. This limits the independence of record companies (Hesmondhalgh 1999). According to Hesmondhalgh (1999) the collaboration of independent record companies with major corporations is created by a pressure of professionalization and is not only about the abandonment of their preciously held idealistic positions. It does not make independents a sellout, and it does not necessarily mean that they have to make compromises about the product. However, consequences may be a decrease of autonomy of independent companies (Hesmondhalgh 1999).

Major record companies also determine the radio industry. These companies are the driving force behind the standardization of radio programming which influences the autonomy of the radio programmer. Nevertheless, concentration in the commercial music radio industry will enable small, specialist stations to survive and even multiply so that diversified programming will be available in all market areas (Ahlkvist 2001). The opinions regarding the influence of radio on the music industry are varied. Klein (2008) shows in a research that the popularity of radio has decreased, while distribution through illegal downloading increased and makes it more appealing for starting musicians to launch their career through television commercials. Radio stations are mainly challenged by technologies as streaming services who function as internet radio providing the consumer with playlists

and personalized station. This makes it harder for radio stations to be profitable which results in a decrease of music programming on stations and an increase of talk radio (Berry and Sobieraj 2011). Nevertheless, it is argued that radio stations do have more power over the sound of popular music and the shaping of popular music culture than record companies and their A&R managers. This goes against the view of Rothenbuhler (1985) who argues that radio programmers and DJ's are heavily relying on the pre-selection of music of record companies.

Some academics stresses the increasing importance of other and sometimes even smaller intermediaries. Rao (1999) stresses the importance of the intermediary role of distributors being a link between suppliers, manufacturers and customers. They match the supply with the demand. Hirsch (1972) supports this view by emphasizing the critical role of distributors, but also other intermediaries in matching creators to consumers. Collecting societies are deemed more important in today's music industry according to Pitt (2010). There is more pressure and there are a wider variety of income streams to collect from for artists and record companies since the digitalization. While Hracs (2015) sees managers re-emerging in their role as key-intermediaries. They do the promotion of artists and music, calculate the risks in order to put the artists at best in the market, and are constantly networking in order to create opportunities. The newest threat for traditional intermediaries is blockchain technology. There are already predictions about blockchain disintermediating the music industry, however these are very premature. Nevertheless, it has the potential to change the role of intermediaries (O'Dair et al 2017). There will always be noticeable changes in the music industry, but disintermediation will not likely to be the result of these changes (Kretschmer et al 2001). As McQuail (2005) puts it, hierarchies might be broken down, but access to the music industry is far from open and uncontrolled.

#### *4.4 Summary of findings*

Diversity is an important theme among intermediaries in the music industry and the discussion on disintermediation around it. In the findings this theme came back in a variety of ways. The search terms analyzed and visualized by Vos viewer were more diverse for the second timeframe than the first. Looking at the specific dataset of texts on intermediaries the second timeframe turned out also to be more diverse regarding the geographical focus and the variety of intermediaries mentioned in the articles. Many of these new intermediaries are the

true selectors of the music industry since they support the local music and niche markets until they become interesting to the traditional intermediaries like radio stations and major record companies. Thus, the entrance to the music industry is in hands of these smaller intermediaries. An artist first need the support of these players in the field to enter the big commercial market which is still in hands of major record companies.

## 5. Conclusion

Looking at the articles written by scholars between 1975 and 2018 that are collected on the Web of Science database it is clear that there has been a slight shift in influence in the music industry among intermediaries, but record companies are still the ones with the most power. They have to share their influence with more intermediaries nowadays like streaming services, online music blogs and other new entrants.

The music industry will always be affected by new developments, just as happened with the digitalization and other changes before that time, for example a change in recording format. The newest challenge for current intermediary might be blockchain technology. However, this will not lead to disintermediation of which all scholars agree. The intermediaries might keep changing their business model however in order to stay profitable in the changing market.

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## 7. Appendices

### 7.1 Coding scheme

The coding scheme is presented in a separate file

### 7.2 List of search results 1975-2000

This is presented in a separate file

### 7.3 List of search results 2001-2018

This is presented in a separate file

