

State of Independents:
Small-scale Production in a Globally Connected Place

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Independents are generally regarded as essential instruments for the discovery, promotion and sustainability of local music styles, genres and artists. If so, Flanders and the Netherlands thrive on this front, as both countries are well endowed with independent record labels. Taken together, the music industry fosters a huge number of companies that vary in scale, ranging from larger internationally connected labels to very small micro-independents that operate only locally. The largest independents are well-known labels like Armada (Armin van Buuren), Artist & Company (Nick & Simon, Jan Smit), Black Hole (DJ Tiësto), Excelsior Recordings (Spinvis, Triggerfinger, Tim Knol), 8ball (Alain Clark, Miss Montreal), Spinnin Records (Nicky Romero, Afrojack, Martin Garrix, Sander van Doorn) and V2/PIAS (Balthazar, dEUS, Soulwax).

The market shares of independents have been rising over the last ten years, in physical sales and in downloads, at the expense of the major record companies who have gone through a turbulent phase of mergers and restructuring. By now many different types of independents have found their way on various, separate markets. Admittedly, these markets operate in strong interaction with the production system of the majors to which they are irreversibly joined. Despite this, the dynamics, genres and production practices of independents still stand out from the majors.

Both elements, the interconnectedness of the independents and the majors as well as their specialization on separate markets, will be elaborated here in a quick view of three distinct genres that all show a big presence of independent companies: (1) small-scale DIY-independents operating on the markets of indie pop, punk, singer-songwriter, experimental electronic, noise, electro and shoegaze; (2) internationally oriented independents dominating the market of Dutch Dance and DJ's; and (3) local independents that successfully usurped the market of so-called "Volks"-music. The findings are based on dozens of interviews with music executives, held over a period of fifteen years.ⁱ

A context for change

Since the 1990s the growing influence of independent record labels in the recording industry was greatly stimulated by digitalization. At the same time, the success of the Internet enabled the production and distribution of music without “intermediation” by formerly crucial external parties. In the process, barriers to entry have diminished due to lower capital requirements and open distribution channels. Also, the digital music carrier has significantly neutralized the economies of scale that were most beneficial to majors. Simultaneously, the consumer can access music through a more diverse set of channels and platforms. Negus (1999), Cornell & Gibson (2003) and Leyshon et al. (2005) all argue these technological, economic and socio-cultural developments have given rise to a more “democratic” industry. Indeed, in the Netherlands major corporations have lost market share to the independents in both record sales and live returns. While the importance of models benefiting the mass distributors (i.e. the majors) has declined, the industry currently appears to thrive on diversity more than on quantity; a greater variety of music, created by a larger group of artists, is being consumed by a more diversified audience.

The recording industry continuously adapts to technological innovation. Labels that are quick to adapt to changing circumstances usually gain most from it, at least initially (Dowd, 2006; Tschmuck, 2006). Throughout the music industry’s history, independent labels have proven to be more progressive in their strategies and operations (Frith, 2001). Over the last decades, like in the 1950s, independents have exploited their possibilities while majors have lost at least part of their dominant position because of their reluctant and risk-averse attitude towards adopting new technologies (Negus, 1999; Dowd, 2006). As Tschmuck (2006: 210) puts it: “The representatives of the old paradigm [majors] will ignore the new regime, and then they will try to prevent the new regime from taking over. In the end they fail at this task, because the old regime is no longer able to control all of the simultaneously altering factors that cause this change.” This attitude, however, does not come as a surprise as the majors perceived the internet as destructive for their once highly profitable modes of operation in the 1990s (Leyshon, et al., 2005).

In the process, the majors have given way to independent labels, which succeeded in re-capturing market share ever since the decentralization of production, distribution and promotion channels. Apart from the growing possibilities to set up a record label and to distribute and promote music independently, they profited from an

added stimulus as consumers seemed to be ready to try out a more diversified supply. Because it is more convenient and less committing to sample music, consumers became less risk-averse in their choice of music (Wikström, 2010). By now, this change in consumer attitudes has led to a longer “tail” in music listening habits—a wider standard deviation of diversity—and has clearly favored more obscure musicians and their labels.

These technological and social developments opened up new music markets where the majors were no longer actively involved. At the beginning of the new millennium Frith (2001: 50) argued that a niche market could emerge next to the existing “traditional mainstream” Pop-Rock market in which the majors are dominantly present. With fifteen years hindsight, we can say he was right. Keunen (2012) recently took the argument even further by talking about an “alternative mainstream.” Music can now be produced, distributed and consumed through niche channels that function autonomously from the formerly exclusive mass-channels. Artists can present themselves on these channels circumventing the gatekeepers we know from the pre-digital music industry. However, it should be noted that for a large part this is a market with small audiences and low profits.

Not all the experts share the views of Frith and Keunen. Keen (2009) and De Meyer (2010), for instance, dismiss these niches full of “amateurs,” and claim that the breakdown of barriers has not benefited the overall quality of the industry, and has in fact made labels (in the literal sense) even more important for the sake of visibility and recognition. Yet, they overlook that the existence of these niche-markets shows that a democratization of channels has in fact taken place and, most importantly, that complete independence from the majors is once again possible. While majors are still dominantly represented and work next to independents in most commercially viable genres, it is important to bear in mind that separate markets can and do operate successfully parallel to each other.

The growing influence of independents makes itself felt particularly on the field of locally produced music. Since 1990, this music has not only become increasingly popular but it has, to some extent, even replaced Anglo-American music (Hitters & Van de Kamp, 2010). There are huge differences, though, between the independents that produce and distribute such music. Many independent record companies operate in small niche markets, selling only minor amounts of records. Typically, such companies are DIY-independents. Music produced by means of DIY

has soared since the 1990, encompassing many styles but with a main focus on experimental electronic music and “indie” or “alternative” styles. Much less alternative are the hugely successful Dutch acts—operating in the two very different genres of “volks” and dance (EDM)—which are also primarily promoted by independent firms. It is an intriguing question why the majors have not engaged themselves fully in these fairly mainstream genres. Below, I will explain their reluctance by emphasizing, next to the interplay between quality and commercial interests, the ways in which these genres are being perceived by the record company staff. As we will see, when managers at the majors discuss “volks,” they show a certain condescension for this genre that is strongly embedded in local traditions (e.g., a working class audience) and that does not translate well to markets beyond the Netherlands. In contrast, they praise the international reputation of Dutch DJ’s, but very clearly state that this genre falls outside their usual business—particularly given their unfamiliarity with the social scene from which it springs. The cases thus illustrate how the status of a specific genre is tied to the social groups that it is associated with, in terms of production as well as consumption.

DIY micro-independents

Dutch DIY micro-independents have many characteristics in common, which makes them clearly stand out from record companies that operate on the mainstream market. Micro-independents in Flanders and the Netherlands are small organizations, in most cases established by one or two people. The main drive for these entrepreneurs is their love for music in general and for specific genres in particular. They often started by releasing their own or their friends’ music. Most Dutch micro-independents are still managed by a staff of one or two, and very often are run from home. These micro-independents produce on a small scale, in most cases releasing about four productions a year. These productions are issued in editions of 150 to 500 pieces. DIY independents exclusively release indie genres such as indie pop, punk, singer-songwriter, experimental electronic, noise, electro and shoegaze. These can be considered as non-commercial, counter-hegemonic music styles (Hesmondhalgh, 1999, Strachan, 2007) beyond the mainstream supply by the major record companies. Micro-independents are often not limited to releasing one specific genre. Gabry of

Narro Minded describes why: “The funny thing is that our audience, the people who feel challenged with what we’re doing, mostly listen to all these different styles of music. It’s not that we serve complete different markets. They’re just people who love adventurous music. And that’s just how we also see ourselves. It’s not that odd; there are just people out there with broad tastes and there’s just a lot of music around. That’s what I think. They’re just music lovers, I guess.” (Interview, May 19, 2011).

Micro-independents primarily release music in order to contribute to the widening supply of contemporary music. The self-imposed restriction to “indie” genres may be conceived as an act of classification, a way of distinguishing the label from the major record companies or the mainstream music market. Commercial or financial success is not considered to be important by micro-independents. This stance, however, can also be interpreted as a moralistic motive to oppose the dominant position of the majors in the domain of taste cultures, a form of symbolic resistance (Strachan, 2007). In that way, Dutch micro-independents share many properties with similar small labels in the United Kingdom and the United States. Micro-independents are all embedded in both local and international network structures, often genre-specific.

Compared to their British counterparts, Dutch micro-independents show much less oppositional political dynamics (Strachan, 2007; Savage, 1991; Hesmondhalgh, 1999). They do not aim to challenge the majors, nor do they want to democratize or transform the music market itself. The DIY’s are quite realistic in that sense. They acknowledge that they have little financial possibilities and that they are only able to release music on a very small scale. Subsequently, competition with the majors is regarded as unrealistic or even naive. Lasse of the Rotterdam Betontoon label argues: “It’s not my mission to overthrow the majors. That would be an absurd thought, because with our type of music you simply can’t overthrow any major record company. Fans of Lady Gaga are definitely not going to listen to the music of Alien Drones.” (Interview, April 26, 2011).

In addition, the micro-independents release their productions often only on vinyl and cassettes, thus limiting themselves deliberately to a niche market from the start.

DIY micro-independents are also deeply rooted in independent music scenes and sub-cultures, both locally and internationally. There are many forms of cooperation between micro-independents and local and independent record stores. In

addition, the staff maintain close contacts with fanzines, distributors, bloggers and journalists. Other network connections are contacts with music venues, programmers and recording studios. Characteristically such network relationships are based on mutual support, trust, advice and exchange. Collectivism then, may be considered an distinctive ideological mark of micro-independents. This collectivism places the importance of music before commercial or business interests. Nevertheless, as is the case with internet distribution, such networks are in many ways connected to the proliferated music industry as a whole. In that way, micro-independents are as much tied to, and part of the mainstream music industry from which they often vehemently distance themselves.

Micro-independents seem well positioned to capitalize on their lean organizations, their network structures and their digital as well as non-digital distribution networks. Nevertheless, they do not compete with mainstream music, but appear to operate on a parallel market. This parallel market logic is underscored by both the usage of distinctive non-mainstream genre classifications as well as their artistic “denial of the economy” (as coined by Bourdieu). Their primary motivation is the love of music and their contribution to the diversity of taste. Rewards are mainly symbolic, voiced in terms of pride and recognition.

Dutch dance and DJ's

Dance or EDM (Electronic Dance Music) is acknowledged as a distinctive genre that takes a substantial share of the Dutch music market. Furthermore, it is the most exported type of Dutch music, generating 120 million Euro's in export value in 2014. This specific style of music emerged in the Netherlands at the beginning of the 1990s. At that time, dance was arguably a lifestyle as much as a musical style—as Hesmondhalgh (1997) has observed in another setting. Its producers and DJs were entrepreneurs who not only created and produced the music but also were closely involved in the organization of dance parties. Majors could not effectively “deal” with the supply of ready-made dance products and the fast developing musical lifestyle. A former artists' manager who worked at a major in the mid-1990s noted: “You have to be part of the scene, live dance, because today's hit might be old-fashioned tomorrow and the other way around. If you can't keep a finger on the pulse and if you are not

closely involved ... having affinity with the music and having the right feeling, then you can't market and distribute it." (Interview 2006).

Dance music concurrently developed its own independent infrastructure, which did not fit in with the majors' traditional modes of production and distribution networks. A survey of the music market in the Netherlands in *Music & Copyright* (1995: 8) emphasized this very point, using the case of 2 Unlimited—a successful dance act in the 1990s signed to the Belgian independent Byte Records—and their distribution deal with Sony as an illustration. Although Sony and the other major companies took a close interest in the Dutch dance music sector, it continued to be dominated by independent producers and labels such as Armada, Black Hole, Dirty Dutch, Mix Mash, Spinnin and Wall. A former manager at a major company commented: "The reason is that dance requires a completely different approach. So the majors started cooperating with the independents that do have creativity, speed and versatility. They offered a connection to the dance world." (Interview 2007).

Although dance, too, is domestic, it is generally classified as an international genre. More than any other kind of domestic music, it is embedded in the international dance scene. According to a managing director of a major company: "There is quite a lot of Dutch dance, but it isn't really classified as such because it has an international character. But OK, for our statistics, it is a national music product, although it's never really acknowledged as such." (Interview 1995).

The global success of dance acts from the Netherlands illustrates how independent companies, rather than majors, can succeed in breaking local artists internationally. Early "break-out" artists include such acts as Twenty 4 Seven, DJ Tiësto and Armin van Buuren. Initially, the majors could not effectively foster these acts within their institutionalized company structures (and cultures). Only later on in the process have the majors been able to sign a number of successful dance artists, through whom they became involved in this genre.

Similar to DIY-independents, dance appears to have created a market of its own. The autonomous market that has evolved is economically hugely viable. Here, we see an emergent parallel market, very different from the non-viable niche market of the DIY's and the commercial mainstream market. Similar to Keunen's observations, we observe a market somewhere in between niche and mainstream and between small and large in scale. Dance labels could thus be coined as "mainstream independents."

Interestingly, this new market appears to have its own internal mainstream/alternative division. With the arrival of Spotify, the focus once again seems to go to a more mass-based industry. As the market has grown over the years and independents within this industry have developed in their own right, there now may be developing a split within this genre itself. Independents with large-selling artists (Armada), a large back-catalogue (Be Yourself) or much marketing power (Spinnin) are suitable for mass listening through streaming models like Spotify. These large labels on the one hand strengthen their current position, while small labels on the other lose market share. This theory is supported by the labels involved. A small label may not be able to generate income through streaming. The label manager at Rush Hour: “You really need to have a 100 million views or plays if you want to earn 10,000 euros. Since that’s only possible for 10 artists I’m not sure what to think of it” (Interview 2011).

Larger labels are more confident: “At first I wasn’t looking at Spotify in positive terms, but now that it brings up serious money, also for us, I do” (Interview label manager Armada Music 2011). And: “That’s where the profit is: the mass. So if you have a lot of subscriptions, you can earn more. There are a lot of bread crumbs of which you need to have a lot of good ones” (Interview label manager Spinnin Records 2011).

It can be concluded that the Dutch Dance industry has established an autonomous global market. With the growing viability of the market and the continuing absence of majors, a new mainstream market has emerged in which independents have taken center stage. With the growth of new streaming music consumption, the market seems to differentiate again from within. In other words, only the most successful Dutch Dance independents have grown to a position similar to majors in the mainstream market, due to their large selling artists, marketing power and large back-catalogue that can secure income from new business models.

Volks-music

Our third case differs greatly from the internationally successful Dutch DJ’s. It goes by the name of “*levenslied*” or “*volksmuziek*” and it is a distinctively local style. This designation of “local” includes songs in both Dutch and other languages (mostly English) while its style is clearly MOR or traditional pop. An adequate translation of

the Dutch name for this genre is difficult, with concepts like “folk songs” or “schlager” not really covering its essence. Therefore we have chosen to use the Dutch word “*volks*”—which can be loosely defined as a popular song sung by a “guy-or-girl-next-door” type of artist, and often featuring traditional instruments such as the accordion or the organ. Most of the time, the contents are sentimental, related to love affairs or overcoming hardships. “*Volks*” refers to a product that has strong ties to traditional Dutch music rooted in working class cultures. These roots are reflected in its current performers, as well as in its traditional audience; these roots also arguably evoke “low-brow” elements.

Recording executives have approached this traditional genre differently over time. In the 1980s, as public interest for the genre slowly diminished, the majors still cared for the artists and their songs. Except for a few artists with huge successes—between 1976 and 2004 André Hazes scored no less than 9 Top Ten hits—the genre, however, lost its attraction and the majors became wary of it. When, unexpectedly, during the 1990’s traditional Dutch songs became fashionable again—the so-called Dutch revival—the record companies were still actively looking for ways in which this phenomenon could be commercially exploited. A variety of managers and key personnel stressed that they always have had some “*volks*” as part of their repertoires and that it always selected its own audience. That is, it had a stable value and provided a solid foundation for record companies—including the majors. The latter, however, missed out when the Dutch revival got under steam and a new generation of popular artists, like Jan Smit and Frans Bauer, arrived on the scene. Most of these artists were contracted by independents..

A few of the managers at the independent labels concluded in 1995 that the majors had underestimated the genre—believing that these large companies were of the view that the audiences for “*volks*” would decrease as new generations of listeners lost interest in it. As a result, the majors were reluctant to sign contracts with “*volks*” artists: “A&R managers at the majors were fools. I had my company with 40 independent hits a year, and then this 30 year-old brat would listen to a tape and say, “Well, I don’t know, I can’t hear it ...” I often felt the inclination to shout at him—and I even did once: “You’ve never heard it! Listen to me. I hear it 40 times a year! Listen to me and you’ll be famous” (Interview owner independent company 1995).

A manager at one of the majors acknowledged: “Some eight years ago we made a huge mistake. This whole “*volks*” stuff was in a big dip. We then decided that

we wouldn't do "volks" anymore ... there are no longer people who like that anymore, the world is changing. We thought it would be no use investing in it" Interview 1995).

The reluctance of the majors to deal with "volks" involved more than their managers' view of its supposedly declining audience—it also involved their disapproval of this genre. As one manager stated: "It has a low cultural but a high commercial value." The inferior status attributed to "volks" is a recurring theme. A statement made at a staff meeting of EMI Holland in 1997, just when the Dutch revival made itself felt, clearly illustrates this point: "Jantje Smit and Frans Bauer are going like a rocket. It just goes to show that good music doesn't attract a big audience. The genre of Bauer really is very successful, even though it's not high quality stuff" (Minutes of staff meeting, April 10, 1997).

The low status of this music persists to this day. A former managing director of a major: "You wouldn't want to limit your company to the Dutch low culture so to say, with the likes of Frans Bauer, etc. There may be a market for it, but that is only the Dutch language market" (Interview, 2007).

In their reluctance to deal with this genre, the majors remarkably failed to anticipate the shifting tastes in the broader society. Indeed, since the start of the new millennium, "volks" has become a more accepted, albeit sometimes "camp," addition to the increasingly "omnivorous" tastes of high status individuals engaging in low status musical genres (Van Eijck, 2001). As a result, they left this field to the independent recording companies specializing in Dutch singing artists, to meet this demand by actively developing "volks" acts. A European manager of a major remarked: "Now in the Netherlands, there are even more independent firms specifically dealing with local product that is sung in Dutch. Take NRGY, now doing Gerard Joling, or Artist & Company, or that new company called Pluto Music & Management. They're doing Marianne Weber, Grad Damen; all very specialized. With a limited artist portfolio on which they fully concentrate" (Interview 2007).

Companies such as NRGY and Artist & Company have become very successful over the last few years with successful artists not only in album sales but also in live performance and TV-appearances. Most well-known are Frans Bauer, Jan Smit and Nick & Simon. Artist & Company, moreover, proved to be innovative; the company manages all aspects of their artists' careers and they have been very successful in developing their artists into established names in the television and live-entertainment industry. In some cases, the majors have formed ties with independents

that deal in “volks”—treating these “indies” as part of their repertoire units. This is a good example of “decentralized production”—where the majors expand their organizational structure in order to serve mainstream as well as niche markets (Dowd, 2004; Lopes, 1992).

“Volks” music independents operate in a specialized market, very close to the mainstream entertainment industry in the Netherlands, and highly connected to contiguous and parallel markets. Their stars are integrated into the wider entertainment landscape with numerous television appearances, live concert transmissions and even their own television productions. Even though some of these stars branch out to neighboring countries such as Belgium or Germany, they remain very Dutch and thus essentially domestic. Compared to Dance-independents, these companies focus on a specialized local market. Such “domestic independents,” focusing on distinctly local styles, may be found across the globe as they are essential to the musical identities of nations, regions and sub-cultures.

Conclusion: state and status of independents

The field of independent music production is multi-faceted and cannot be considered as a uniform set of similar firms. The range of styles produced by independent recording companies is vast. Likewise, companies range from micro firms with only one or two staff to medium sized companies with staff of 50 and over. Most independents specialize in certain genres, with the overall characteristic that these are typically genres that are largely ignored by international majors like Sony, Warner and Universal. This specialization, though, certainly does not make the mainstream genres into the prerogative of the majors. Increasingly independents have captured viable parts of this market.

The importance of independents for local music production cannot be underestimated. Specifically local styles like Dutch language *volks*-music, are nurtured and sustained by independent record companies. But also more internationally oriented counter-mainstream styles need independent production to become heard. Alternative indie or electronic scenes have set up their own DIY micro independents in order to add their music to the hegemonic mainstream genres of the major recording companies. Thus, DIY-independents remain close to the mainstream/alternative

dichotomy, with indie-styles, small-scale production, authentic music, non-commercial attitudes and small audiences. Similarly, artists in Electronic Dance Music have developed their genre outside of the interference of the majors. Whereas the success of DIY indie genres remains limited to small specialized audiences of music lovers, Dance genres have had an enormous international success, turning Dutch DJ's like DJ Tiësto and Armin van Buuren into international superstars.

Independent music production classifies itself as distinctive from mainstream hegemonic mass music markets in which large capitalist corporations operate internationally and cater to general tastes. Independents represent genres that are not, or only limitedly, represented in the repertoire portfolios of the majors. However, these genres are not necessarily alternative or counter-mainstream and can attract huge audiences. Dance-independents can thus better be described as “mainstream independents”. Furthermore, the example of dance shows, that such genres require specialization because they spring from a rapidly developing music scenes that stand relatively apart from the mainstream recording industry. Dance also exemplifies a genre that is specifically connected to the musical style of a scene or sub-culture. Major record companies have enormous difficulty in dealing with such styles, as they do not fit in with their existing “cultures of production” (Negus, 1999).

Broadly speaking, the same goes for the “volks”-independents. These “domestic independents” may typically focus on distinctly local styles, but their artists are highly integrated into the mainstream entertainment market. Vice versa, isomorphic pressures on the major record companies have resulted in a wider acceptance of both Dance and “volks”-genres and, integration into the day-to-day operations of majors. So, as Hesmondhalgh rightly points out (2006: 222) we cannot fully explain alternative independent music production as a Bourdieusian subfield of restricted small-scale production. As shown in this contribution, independents are inextricably bound to the field of mass cultural production. Due only to the overall growth of musical supply, technological innovations, audiences and the access to music, have independents been able to establish themselves as a viable element of the multidimensional recording industry.

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Notes

ⁱ The data have been gathered together with Job van der Velden and Robin den Drijver, interview data with Michael Christianen and Paul Rutten.