

2019

# Music Marketing for Digital Natives

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# Music Marketing for Digital Natives

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Presentation Date: 10 May 2019

Graduation Date: May 2019



### Abstract

The digital innovations of the 21st Century have shaped not only how record labels sell their artists, but also how fans experience these artists. Record labels have had to rethink strategies to engage audiences in a streaming and social media-dominated industry. With Web 2.0, music fans have become prosumers where they are able to create and share their own content resulting in less influence by music companies. Previous studies focused on the growing influence of the digitized music industry, however these studies lacked the fan responses of this new structure of the industry. This study seeks a greater understanding of the influence of record labels on fan music consumption within a digitized society. How are record labels navigating the growing influence of online social services in terms of audience engagement and marketing, and how are music fans responding to these new practices? In this triangular study, phase one focused on interviews with music industry professionals, phase two focused on focus groups with music fans, and phase three focused on the relationship between phases one and two. The study found that fans are searching for two things from their favorite artists: engagement and experience. Social media has improved the artist-to-fan relationship, but it does not necessarily substitute for the music experience. Music fans yearn for physical experiences with their favorite artists that create lasting memories. Further research will require a greater understanding of the specific marketing strategies used as well as a closer look at online communication.

**Table of Contents**

I.	Introduction	6
	a. The Recorded Music Industry	6
	b. Current Business Trends	8
	c. Research Questions	9
II.	Literature Review	10
	a. Web 2.0	9
	b. Digitalization of the Music Industry	11
	c. Uses and Gratifications Theory	13
III.	Methodology	15
	a. Period of Analysis	16
	b. Participants	17
	c. Data Collection and Analysis	18
	i. Interviews.	18
	ii. Focus Groups.	19
IV.	Findings	19
	a. Phase One: Interviews	19
	i. The Streaming Boom.	19
	ii. Changing Operations.	21
	iii. The Role of Record Labels.	22
	iv. Building and Shaping Demand.	24
	b. Phase Two: Focus Groups	27
	i. Impact of Social Media.	27

ii. Marketing Strategies.	30
iii. Label Perspectives.	33
c. Phase Three: Comparative Analysis	34
V. Discussion	36
VI. References	39

## **Introduction**

Before the digital revolution of the 21st Century, music artists seemed like distant figures to the music fan. The artist was untouchable. With the rise in social networks such as Facebook, Instagram, and Twitter, music artists became attainable. They finally felt real because fans were able to connect directly with the artist. The artist-to-fan relationship became more authentic. With this newfound authenticity, social media platforms also gave fans more control over their own music experience.

This study utilized interviews and focus groups to better understand how record labels are navigating the digital shift of the 21st Century, and how music fans want to experience their favorite artists.

## **The Recorded Music Industry**

In 2018, the recorded music industry marked their third straight year of double-digit growth in the United States, up 12% from 2017 to \$9.8 billion (Rys, 2019). From these numbers, it is evident that the recorded music industry continues to thrive. Dominating the global music market are three major music companies, who in 2016 made up almost two-thirds of the total music market (McDonald, 2018). These companies are Universal Music Group, Sony Music Entertainment, and Warner Music Group.

An overwhelming majority of revenue in 2018 came from streaming. 75% of the United States' \$9.8 billion in revenue came from streaming services such as Spotify and Apple Music. Overall, 85.4% of U.S recording music revenue came from digital sales (Rys, 2018).

While the industry is thriving, it is still nowhere near the music industry's peak, which was at \$21.5 billion in the US (adjusted for inflation) by the end of the 20th Century (Rys, 2018). At this time, CD's dominated the market, totaling \$18.9 billion (87.9% of the total revenue) (U.S

Sales Database). By the 21st Century, new technological advances disrupted the flow of the music industry. Napster shook the industry by making songs available to consumers for free. This peer-to-peer file-sharing network debuted in 1999 and was quickly sued for copyright infringement because users were able to easily share their MP3 files with other people (Taintor, 2004). By the time Napster shut down in 2002, it already had done some damage to music consumption, yet it had revolutionized the fan experience. Music industry sales, which had been experiencing year-over-year growth, started to decline. The iTunes Store was launched in 2003 under Apple, and sold 70 million songs, generating almost \$70 million in music sales, in its first year (Taintor, 2004). With iTunes in the market, digital sales began to rise, however, the overall music industry in the United States was on a steady decline, reaching its lowest numbers in 2014 and 2015 - \$6.7 billion - since 1989, where revenue was at \$6.6 billion (U.S Sales Database). Record labels had to create the best strategy to navigate their changing role in the industry.

The next era of music consumption was within free, ad-supported and paid subscription services. Pandora Radio launched in 2005 as a music streaming and automated music recommendation Internet radio service. Starting out as a paid service, the company quickly changed to an ad-sponsored service to make its product more attainable for users. Three years later in 2008, Spotify was launched as another music and audio streaming platform. Spotify acts as a freemium service where users have free access to basic services, while additional services are offered through a paid subscription. By 2012, Spotify had acquired 15 million active users worldwide with 4 million paying for the service every month (Sanburn, 2012). At the introduction of streaming services in 2005, their revenue stood at \$149.2 million in the United States, just 1.2% of the total revenue for the year (U.S Sales Database). In 2018, streaming formats accounted for approximately 74.9% of total US revenue (U.S Sales Database).

Entertainment Retailers Association CEO, Kim Bayley, noted, “for the first time since the birth of the modern entertainment business in the late 1950s, more revenue is coming from payments for access rather than purchase” (Dredge, 2017). While these disruptions were occurring to the market, they were simultaneously introducing music fans to new ways and places to share their love of music.

### **Current Business Trends**

The shift in music consumption in the 21st Century stirred record labels’ marketing, distribution, and promotional strategies. For the longest time, physical sales were the pathway to profit and labels were able to keep a general strategy formula when it came time to distribute their music.

The rise in social media platforms in the 21st Century such as Facebook (launched in 2004), YouTube (launched in 2005), Twitter (launched in 2006), Instagram (launched in 2010), and Snapchat (launched in 2011), have forced record labels to evolve from “traditional product-marketing practices to open and creative conversation with consumers” (Dredge, 2016). Lucy Blair, director of international sales and marketing at The Orchard noted that one big shift in the way labels operate is the time lengths of campaigns (Dredge, 2017). Currently, campaigns can last upwards to a year based on planned lead singles, songs that unexpectedly capture the attention of fans, and even concert tours. Live Nation, one of the largest touring promoter companies in the US, reported \$10.8 billion in revenue in 2018, marking the company’s eighth straight year of growth (Mims, 2019). Concert attendance in 2018 reached a staggering 93 million people (Mims, 2019). This statistic emphasizes the growing influence of live touring on the industry.

This transfer of practice has also affected the relationship between labels and managers. Managers have begun playing a larger role within the digital marketing sphere making it easier for the label's marketing divisions to manage longer campaigns with tight budgets and stretched teams. While digital marketing responsibilities are moving towards managers, advertising responsibilities are moving in-house to the labels. Labels are now bringing in digital advertising and media buying in-house to have better control of the data rather than relying on external agencies. The overall trend in the music industry is an emphasis that flexibility is key in an ever-changing industry. To capture the attention of fans and maintain their engagement, record labels must create content that is authentic and story-based (Dredge, 2016). Music is now all about creating a valuable experience for the fan.

### **Research Questions**

The evolving operations of the recorded music industry put a greater emphasis on the consumer's needs and wants. The present study will focus on the influence of record labels on fan music consumption. By going directly to the source - that being the industry leaders and fans - the study poses the following questions:

RQ1. How are record labels navigating the growing influence of online social services?

RQ2. How are record labels utilizing social media platforms to engage audiences?

RQ3. How are record labels selling their artists to informed audiences?

RQ4: What makes an artist appealing to music fans?

RQ5: What marketing strategies are appealing to music fans?

## Literature Review

### Web 2.0

It is clear that the rise of the Internet and digital media in the 21<sup>st</sup> Century sparked new opportunities for communication and collaboration among producers and consumers. Social media, also called Web 2.0, work to serve as a platform that encourages user-generated content and collaboration. With Web 2.0, users have more power than ever before by influencing the development of products, news, and entertainment. What comes from this new wave of digital communication is an emerging hybrid model of distribution that moves towards circulation, remixing, sharing, shaping, and reframing media content. Web 2.0 engages its users more effectively through popular social networking sites such as Twitter, Facebook, Instagram, and SnapChat where users have the power to personalize their page, post, repost, and participate with other users.

Early studies of Web 2.0 identified active consumers as co-creators and innovators who create value (Prahalad & Ramaswamy, 2004; Von Hippel, 2009; Choi & Chung 2013). Creating value is all about creating experiences for consumers where they have the power to build active dialogue and personalized experiences (Prahalad et. al., 2004, p. 8). Choi et. al. (2013, p. 4770) notes that ordinary people, previously described as consumers in the old economy, have become important figures as innovators and creators in the networked economy. Crossing barriers, these consumers are no longer passive markets in the industry. Consumers are increasingly using social media to receive their information and share their opinions on products, which has resulted in companies relying heavily on the digital space for marketing and promotional strategies. Moreover, connections between the music artist and the music fan are becoming a reality. This jump in consumer online usership has minimized the effect and role of the producers being the

sole source of brand communication (Schivinski & Dabrowski, 2016, p. 190). Not only do companies need to monitor their own public messaging, but they also have to be aware of how consumers are using social platforms to communicate about the product. This new form of communication has transformed the traditional one-way communication to a two-way flow of communication, forming a participatory culture in which the public not only acts as consumers, but also producers – “prosumers” (Berthon, Pitt, & Campbell, 2008; Li & Bernoff, 2011; Schivinski et. al., 2016).

### **Digitalization of the Music Industry**

Previously, the music market was based on mass consumption controlled by major record labels that were responsible for the discovery and distribution of music. Previous studies of Web 2.0 discussed the opportunities and potential for businesses to create a closer relationship with their consumers. New technology not only offered more opportunities for users to connect with each other, but new technology also provided businesses with the ability to connect closer to their consumers. In 2007, McCourt and Burkart discussed how new digital platforms can be catalysts for demand shaping, or taste cultivation on the part of record labels, thus reducing the strain on A&R and marketing departments. Moreover, El Gamal stated in 2012 that opportunities in digital distribution and live entertainment would become a strong force in the music industry as the progression of the Internet continues (p. 68). The success of the music industry has become largely dependent on a company’s ability to innovate and adapt to the growing digital platforms and consumer behaviors.

Within a participatory culture, consumers are no longer at the end of the value chain process and no longer consume what is marketed to them. Consumers are using music content at a greater level than ever before whether that be personalizing music libraries, sharing,

downloading, or just enjoying the music itself. The new independence consumers have over sharing and discovering new music greatly influences how record labels decide to sell their artists (Choi et. al., 2013).

As music fans are exposed to more diversified information, record labels find themselves in the difficult scenario in which they are marketing their music to informed audiences. Music fans can stream unlimited music for a monthly subscription, or they can influence the attitudes of their peers by posting or sharing artists and music on their feeds. Today, music fans do not need to rely on major labels to expand their music library. Music fans who are digitally fluent in the practice of social platforms are able to individually find the music they love and build relationships with the musicians they follow.

In the process of this new exchange between the consumer and the label, Lee (2009) noted the complete restructuring of the music industry where the record labels are now simply members of the music industry, rather than the representation of the industry as a whole. The music industry has shifted from a manufacturing industry to a service industry. In a web 2.0 culture, no hierarchical structure exists and instead the structure consists of dispersed networks that affect the creation, distribution, and promotion of music (Choi et. al., 2013). Choi et.al. found that the value of traditional physical formats has diminished given the rise of file sharing and streaming services making the experience of purchasing music in the traditional music market irrelevant. What has resulted is a greater awareness of the music fan's online behavior. Record labels have begun to recognize the need to focus on developing personalized relationships with consumers to foster engagement to generate revenue through loyalty (Schivinski et.al, 2016). Choi et al. (2013) suggested that record labels should consider

developing new ways to interact with consumers by building and shaping audiences for profit maximization and domination of the popular music market.

New marketing tactics have emerged, transforming the industry both economically and socially by focusing on social media channels to drive economical distribution and promotional materials for artists (El Gamal, 2012). Record labels have begun studying an artist's demographic and engaging with them accordingly. Ways in which this has been achieved is through the artists themselves. Social media allows for musicians to interact directly with fans and vice versa, thus eliminating distance and the role of gatekeepers, which have historically been through media networks, agencies, and record labels. A recent study (Ansari, 2018) noted the importance of artists actively engaging with their fans to maintain exposure and popularity; to stay relevant.

The present study will now seek a greater understanding of the specific marketing strategies used by major record labels to combat the growing influence of the fans on the popular music culture.

### **Uses and Gratifications Theory**

Uses and gratifications theory is an audience-centered approach, which studies the benefits that attract audiences to use different types of media and how it satisfies our social and psychological needs (Dunne, Lawlor, & Rowley 2010). Rubin (2002) notes that uses and gratifications research has tended to focus on one of six major topical areas: (1) linking the media-use motives with media attitudes and behaviors, (2) comparing motivations across media forms, (3) examining the different social and psychological circumstances of media use, (4) evaluating the link or indeed difference between gratifications sought and gratifications obtained,

(5) exploring whether variations in backgrounds affect behavior and attributes and (6), consideration of the methods, reliability, and validity of measuring motivation.

An important layer of the present study is centered on the digital behaviors of social media users. What provokes users to post and how do they respond to other users' posts?

Studies have examined two primary functional sources that contribute to attitudes towards user-generated content: ego-defensive and social (Daugherty, 2008). The ego-defensive function focuses on internal and external threats where individuals are compelled to protect themselves against internal self-doubt and uncertainties as well as external dangers and intimidations. The social functions focus on an individual's desire to seek out activities that are viewed as favorable by others and give them the opportunity to socialize with them. By building communities and connections among individuals, user-generated content helps individuals combat their internal and external insecurities and fears, and engage in activities that build their confidence.

Research has shown that in this new digital landscape, users now seek the approval of their followers or friends, or they wait until someone else has bought into the product before trying it out for themselves. A common theme among users is their desire for self-identity and self-worth through expression in online communities (Lamberton & Stephen, 2016). Previous studies indicate that individuals use social networking sites to experience a selective, efficient, and immediate connection with others for their interpersonal communication satisfaction and as an ongoing way to seek the approval and support of the other people (Urista, Dong, & Day, 2009). This approach of uses and gratifications gives a greater understanding of how consumers use media to satisfy their specific needs. Such needs can include social interaction, information seeking, entertainment, relaxation, convenience utility, information sharing, expression of

opinions, and surveillance of others (Whiting & Williams, 2013). Social media have become an outlet to enhance our understanding of news and media, build our self-esteem, and tailor our appearance to match what is trending. One of the powerful motivating factors for the use of the Internet is to improve one's lot in life (Larose & Easton, 2004).

Current studies lack information on the music fans' responses to the marketing strategies of record labels and whether they are more influenced by their fellow fans, or by the major record labels.

### **Methodology**

This study seeks greater knowledge of the digital relationship between the recording industry and music fans. Since this study is concerned with *how* major record labels are utilizing social media in the ever-growing digital world and also *how* music fans are responding to these strategies, qualitative methods are more ideal. The research design will be a triangular study. Phase one will center on interviews with music industry professionals. Phase two will center on focus groups with music fans. Phase three will be a comparative analysis of phases one and two. Some research revolving around this area of study has used music albums and online music sites to quantify the data to understand the impact of social media on mainstream artists (Verboord & Noord, 2016). While quantitative data is valuable to understand market size and demographics, the current study is seeking a greater understanding of human experience, perspective, and behavioral patterns.

Phase one of this study will focus on interviews with current music industry professionals. Keeping in line with Choi et al. (2013) statement that "qualitative interviews are concerned with understanding the nature of a research area, attempting to listen to what interviewees say, preparing to adopt the emerging themes of the interviews, and interpreting the

data collected”, this study will provide a first account of current marketing strategies conducted by major recording labels. Saunders et al. (2003) also stated, “semi-structured and in-depth... interviews are used in qualitative research in order to conduct discussion not only to reveal and understand the ‘what’ and the ‘how’ but also to place more emphasis on exploring the ‘why’”. These interviews will inform the next phase of the study, the focus groups.

Focus groups will be used in the present study to capture a more in-depth understanding of fans’ attitudes and experiences with artist marketing campaigns orchestrated by the music labels (Salo, Lankinen & Mäntymäki, 2013). Focus groups are ideal for context-embedded experiences, as Shoshana Pollack (2003) indicated with her study on incarcerated women. Banjo and Williams (2014) used focus groups in their study of gospel and contemporary Christian music to create a collective story that may have otherwise been lost with individual interviews.

### **Period of Analysis**

The current era of the digitized music industry – the second half of the 2010s – has blurred the lines between producer and consumer. Now, music fans themselves are seen as free advertisers for the labels. On June 16, 2018, Beyoncé and Jay-Z performed at London Stadium in London, UK as part of their *On the Run II* tour. It was at this concert that the couple turned the attendees' attention to the screens on stage, which then displayed “ALBUM OUT NOW” (Grow, 2018). This surprise release put album promotion in the hands of the concert attendees who took to social media accounts to spread the news. The album went on to debut at number two on the Billboard Top 200 with 123,000 sales (Caulfield, 2018).

This era has also blurred the lines between major record labels and independent artists. Now, artists not signed with major labels are still able to promote themselves on social media and upload their music to streaming services. One of the most recent and well-known cases is

American rapper, singer, and songwriter Chance the Rapper, who gained popularity from uploading his mixtapes to streaming services. Since the start of his career in 2012, Chance the Rapper has released his music without the aid of a record label. He has taken full advantage of the free distribution and marketing available on the Internet. In 2016, Chance's album *Coloring Book* became the first streaming-only release to win a Grammy for best rap album (Flanagan, 2017). The album was promoted mostly through word-of-mouth.

Early studies in the 2000s noted the potential for social media for artist promotion and audience engagement, and now in a time where virtually anybody can create content, this study seeks to examine how the music industry has adapted to the ever-growing innovations and audience behaviors in a digitized business.

### **Participants**

For the purposes of this study, two units of participants will be required: professionals working in the music industry, and music fans. Selected participants were not limited by age, ethnic background, or socioeconomic status. Interviewees speaking on behalf of the recording industry have worked in the industry for a minimum of two years. It is assumed that the experience and educational background required of the music companies give a greater level of credibility to those interviewees and the resulting data.

Emails were sent to all potential participants and based on those interested; four music industry professionals and nine music fans were selected. No area in this study required the need to randomize the participants. Four interviews were conducted, lasting approximately thirty minutes each, and two focus groups were conducted, lasting approximately forty-five minutes.

Interviewee A is an entertainment lawyer who has represented artists, producers, writers, and companies. Interviewees B and C work as managers in touring and events at a major record

label. Interviewee D works in radio promotion at a major record label. The content of the interviews was not a reflection of the label or the music company of employment as a whole, and are solely based on personal experience of the interviewees.

Music fans were recruited based on their general knowledge of the music industry and current popular artists in order to achieve data with substance and value. Participants were college students in New York City. Their preferred genres of music include rock, alternative, indie, and current mainstream. All participants noted their heavy use of streaming services including Spotify and Apple Music, as well as social media platforms including Twitter and Instagram.

### **Data Collection and Analysis**

#### **Interviews.**

To achieve a baseline direction for the focus groups, the interviews with industry professionals were conducted first. Questions were compiled based on the research questions and broken into three categories: The digitalization of the music industry, changing business strategies, and maintaining audience engagement. These category names were shared with the interviewees to allow for a source of direction leading into the interview. Questions on the digitalization of the music industry related to the expansion of social platforms in recent years, the impact on the role of record labels, and the different avenues for revenue. Questions on the business strategies related to audience creation, changing promotional and marketing strategies, and maintaining exposure. Lastly, questions on audience engagement related to fan responses to marketing campaigns, building and shaping demand, and fan participation in the direction of marketing and promotional practices.

**Focus Groups.**

After gathering information from the interviewees, focus groups were conducted with the purpose to examine whether the music fan responses and reactions to online marketing and promotional strategies matched that of the music industry professionals. The structure of these questions was more reflective of the data collected from the interviews in phase one of the study. Questions in the focus groups centered on the participant's own experiences with social media and music, and their responses to the strategies implemented by music labels. Questions were broken into three categories focusing on the digitized world, artist promotion and marketing, and artist engagement and influence.

The purpose of this method is to see if the data collected from the interviews and the data collected from the focus groups complement each other. Are music fans responding the way record labels are expecting? The findings section of this study provides more light on these questions.

**Findings****Phase One: Interviews****The Streaming Boom.**

Historically, the music industry has never been in favor of tech companies. Interviewee A, an entertainment lawyer, noted that the music industry and record labels have been forced into accepting technology as streaming has become the predominant form of earning income. Furthermore, interviewee B, a touring and events manager, noted that the pace in which technology companies move pose as a disadvantage to the music industry:

“Historically, music companies move a lot slower than tech companies, which is a huge disadvantage because we are content creators now. We don't physically sell

things, and that has been a hard adjustment to understand what exactly the product is that we are trying to sell and how best to get it to where the fans are”.

As a business, everything works one step behind the current trends in technology at that moment. With new streaming services, primarily Spotify and Apple Music, record labels have less power in the consumption field of the business. Streaming dominates consumption, which means labels are not getting as much money as they used to produce with physical sales. On the contrary, Interviewee A stated that although the sum labels receive are smaller, they are legal sums. A previous issue with music consumption dealt with illegal downloads and pirated music, which generated a loss for record labels. Napster posed numerous issues for labels with its free download system.

Streaming does work in a label’s favor because it is legal and consumers are less apt to steal when music is readily available. Streaming is also a value to record labels from a promotions standpoint. Interviewee D explained that streaming can be an advantage to labels when the numbers are strong, thus they can be used to pitch an artist and their song to radio stations. Interviewee D, working in radio promotions, used British artist Rita Ora as an example:

“Rita does great everywhere else except the United States, but her streaming numbers are so good [and that’s] what we pitch to radio stations. Streaming isn’t our friend when we are working with new artists because they don’t have streaming numbers [we can work with]. Carlos Vara is a baby artist, so when we pitch him to radio, we won’t bring up streaming numbers because they will be weak compared to someone like Adam Lambert who’s very much in the same vein who has a lot of streaming numbers because he’s [an] established [artist]”.

Streaming as a new avenue for consumption has directly impacted the ways in which artists make money. As the amount of money earned from physical sales has shrunk, record labels have had to find new ways to produce income. In the newfound 'streaming age', the three largest revenue strands for artists come from touring, licensing, and merchandise. Interviewee C, a manager in touring and events, pointed out that although streaming has limited revenue from music consumption, there are still more revenue streams holistically now, centered around touring, and there are more options for revenue as compared to ten to fifteen years ago. In order for artists to see a profit, they have to be touring, which is why artists are on the road all the time. Other sources of money come from commercial deals as well as 360-degree deals, which are an agreement between the artist and the record label where the label gets a specific percentage of revenue from digital sales, live performances, merchandise sales, endorsement deals, movie and television appearances, songwriting, lyric display, publishing revenue, and ringtone sales.

### **Changing Operations.**

Aside from the variation in financial strategies, new digital innovations such as social media have affected the structure and responsibilities of record labels. The release schedule of singles and albums has changed with the traditional album cycle no longer exists. Interviewee D remembered that ten years ago, music came out on Tuesdays, and now music tends to drop on Thursdays and Fridays. An average of 15,000 are uploaded on Spotify per day and an average of four albums are released each week. This overload of content creates noise that must be broken in order for artists to gain traction on streaming services and on radio. Releases are now "moving backward. Now things are dropping on Thursdays to get better play on Fridays to break through the noise of Fridays" (Interviewee D).

Social media has created an expectation and standard for music artists, which require them to be active all the time, so when the time comes for a single or album to be released the fan base is still there. In the past,

“Artists would go in ‘inactive’ if they weren’t releasing an album, so they might not be doing anything. [This] is not the case anymore. Artists understand that they need to be visible all the time. It seems like every artist is active all the time”

(Interviewee B).

Relevance is key to a stable career and to be relevant, artists need to be engaging on socials twenty-four seven.

Within the label, department functions are changing as well. Historically, artist and repertoire teams were primarily responsible for discovering and signing new talent. Social media now allows artists to release their own music to the world without the aid of a label, and it allows music fans to discover artists on their own. Swedish singer, LÉON, gained popularity on the audio distribution platform, SoundCloud, after uploading her songs in the hopes that her friends and family would hear her music. LÉON’s songs garnered more than ten million streams. A&R representatives did not need to travel to a venue to discover up-and-coming artists; they just need to look at streaming services. With easier access to music and artists, the previous functions of A&R teams at a label are now almost irrelevant. They are now more involved in the process after the artists have been signed. They determine what songs the artists should record, what songs should be released, and how the artists should interact on social media.

### **The Role of Record Labels.**

Music fans have greater access to their favorite music and artists more than ever before, which has put record labels in a conflicting position where they are trying to sell music to fans

who can get this music for free and discover new music for free by using other outlets. The ability for artists to gain popularity from sources like Spotify, YouTube, and SoundCloud, have raised questions of whether or not record labels are still valuable and as influential as they were in the past. Interviewees B and C agreed that although labels have a different function, labels are still important because they provide the financial funding needed to have a full career:

“In general, if you look at these big artists who are ‘independent’ like Macklemore, who isn’t signed to a major label, [he still] has major label distribution and funding. Chance the Rapper had a ton of funding, so even though these guys are saying they are not part of a major label, yes they aren’t signed, but they still have backers, they still have somebody helping them get that reach and those distribution platforms and I think that whether or not it’s a label or whatever platform... the market is so saturated that you have to have somebody to help break through the noise” (Interviewee B).

Artists need to have some form of a professional team in place because the work is too much for one person. The only time when a label is not ideal for an artist is if the artist’s career goals do not necessarily need the funding of a major record label:

“Some bands don’t care about selling records; they sell a shit ton of tickets, so they have a different goal than someone on a major label. Do they need a major? Probably not. Are their songs going to be on the radio? Probably not, but they do still sell a shit ton of tickets where if you want an artist that wants a full career that’s touring, and being on the radio, and having a ton of Spotify streams then I do think you need a label, or a structure similar to that whether it be a ton of funding and resources in order to do that” (Interviewee C).

All interviewees acknowledged the difficulty for an artist to be successful without the financial backings of a record label. While it is possible for artists to market themselves for free on social media, record labels provide artists with the connections needed to expand their brand. Labels are able to link lesser-known artists with bigger artists either through features on a song, or through the use of the bigger artist's fan base.

### **Building and Shaping Demand.**

Gaining the most reach is the measure of success for labels. Their goal is to get their artist visibility. How are the ticket counts? How are the tour dates selling? What is the demand for this artist? The research found that yes metrics are especially valuable, but at the end of the day, it is about getting the artist in sight within a limited budget.

Building and shaping demand for an artist are crucial for an artist to gain visibility. One level of this demand is pushing the artist out to the public. While it was stressed that labels need to appeal to their fans, the interviewees were unable to answer what reliable strategies they use to appeal to their fans: "That's our question every day" (Interviewee B).

The research found that building and shaping demand for an artist is a game of trial and error. Interviewee C mentioned a Vampire Weekend campaign on SnapChat during festival season that worked great, but when the same campaign was used for COIN, the ending result was not as impactful even though the numbers were there. People were not as familiar. It is also more difficult building a vision for newer artists because the labels do not have a solid read on their target audience. In this situation, they will look at the fan bases of more established artists as they have a bigger pool to pull from; there is more data. Sometimes labels need to match the newer artists' fan bases with the fan bases of A-list artists in an attempt to grow the audiences.

Labels will invest in certain campaigns and it is a gamble of whether they are successful. While they do not use a general formula, the study found that the use of previous campaigns help labels determine the direction for their artists:

“We have a toolbox of things we have tried that have been successful in the past, so a lot of times we will first look at the dates and the reach and then go through what we have done in the past that have worked well and see what makes sense. Does SnapChat make sense for this yes or no? Do Facebook displays make sense yes or no? Do events make sense yes or no” (Interviewee B)?

At the end of the day, campaigns are only limited by their budget. Labels will sometimes first think of the biggest campaign they can run and then look at the money and backtrack to figure out what they can do with the resources they have. Sometimes labels want to do Spotify advertisements, but simply do not have the budget for it, so they substitute for the next best thing. Oftentimes, campaigns do not work simply because there was no traction from the fans. Labels will use a program called Hit Predictor, which displays different factors about a song and the most important number comes at the end: a score on the song and its likeliness to be a hit. Some songs score really high and are successful on the charts, but other songs like Rita Ora’s “Let Me Love You”, which scored higher than Dua Lipa’s chart-topper, “New Rules”, garner no traction on the charts or the radio even after a big push from label executives.

Interviewees emphasized that more established artists are content creators themselves, so they require less involvement from their label with social engagement. Meanwhile, newer and more inexperienced artists require more involvement from the label. When pitching songs to program directors at radio stations, everything becomes numbers based for newer artists while established artists are guaranteed initial airplay because of their status.

Another avenue of pushing the artist to the public is through influencer and college marketing. Labels recognize the power of fans and the influence they have over their peers and followers. They think of their overall media mix - the combination of communication channels used to meet marketing objectives. Included in this are using fans as the mouthpieces on social media. Influencer and college marketing teams are able to create organic conversations with their peers and followers with the goal to convert these individuals into active fans.

Research found that although social media is a dominant tool in the discovery and marketing of artists, labels are still incredibly important to keep their artists relevant and to let fans know what is happening. Artists cannot rely solely on social media to market themselves. To be impactful, artists cannot have one vertical campaign; they have to mix it with other mediums like billboard advertisements in Times Square, or playlist adds. Digital and socials can be the focal point, but there still needs to be some other outlet for marketing:

“We don't 'eventize' for every artist because it's expensive, but what we're finding is artists who are younger and have a younger audience (millennials and gen-Z who are coming up) everyone wants an experiential piece. We are trying to create more and more of these moments whether it is on social media is a challenge, or if it's an actual in-person activation to make people feel like they are part of something special" (Interviewee B).

This idea of experiential marketing leads into the second level of building and shaping demand for an artist - maximizing the relationship between the artist and the fan. As mentioned earlier, it is incredibly important for artists to be engaging on social media with their fans in order to keep a sustaining relationship, especially with younger audiences. Record labels care what their fans think, but do recognize that they cannot listen to every comment on social media. Labels are

trying to create a value proposition. They want the relationships between fans and labels, and fans and artist to be mutual: “We want them to feel like we are bringing them things that they care about whether that’s interesting and exclusive content or experiences... we are providing them with a service” (Interviewee B).

All interviewees recognized that the biggest change social media brought to the industry is what they are selling. Record labels are now a seller of a service rather than a seller of a product. This study tests the goals of the new strategies of the producers with the experience of the consumer.

## **Phase Two: Focus Groups**

### **Impact of Social Media.**

Social media has created a new depth to the artist-fan relationship. Before, the only way to experience an artist was through live concerts. With platforms like Twitter and Instagram, music fans are now able to build meaningful relationships with their favorite artists.

According to the participants, Twitter is primarily used as a vocal outlet, a source to share opinions; Facebook is used to share life moments with family, Instagram is used as a personal and professional branding tool, and SnapChat is used to consume memes. Overall, there were four reasons why the participants used social media: (1) to discover new music, (2) to connect with celebrities, (3) to be entertained and (4) to enhance their appearance.

The participants noted the great ease of access that comes with social media when searching for new music. Many of the participants mentioned that their peers’ posts on socials bring to their attention music that they would not generally listen to. People are now able to post their music taste on Instagram stories and even play the music as well. Social media also connects users to their favorite artists, actors, actresses, and influencers. Some of the participants

made a point to mention that they have a setting on their Twitter account that sends a notification to their cell phones whenever certain celebrities post on Twitter. In the scope of being entertained, a majority of the participants explained how social media has also allowed individuals to experience music concerts without being physically present. Live streams posted on Twitter and Instagram allows participants to watch concerts occurring overseas. This is especially apparent with artists such as One Direction, Ariana Grande, and Taylor Swift who all have massive fan bases. These fan bases create designated hashtags on Twitter pertaining to each specific city where the concert is being held such as #OTRABoston for One Direction's "On the Road Again Tour", and #RepTourDallas for Taylor Swift's "Reputation Stadium Tour". All fans regardless of location are able to experience the show through Twitter by following the hash tags. One of the participants also noted that they can now watch full concerts on YouTube. Additionally, the participants enjoy posting their concert experience on SnapChat and Instagram, as they are able to watch their videos after the concert. Social media allows everyone to be included.

An overwhelming consensus among the participants centered on the use of social media to enhance their appearance. Not only do they post to share what they are proud of and passionate about, but they also post to appear "cool". When discussing the meaning of cool, the participants agreed that it related to status. If participants saw a post on Instagram that they thought was "cool", whether it is for the setting, the clothing, or the layout, they would purposely mimic those posts on their own feed to make themselves look "cool". Posting about music festivals and front row seats at concerts constituted as being "cool" because it signifies a level of financial status. Participants want to go to certain concerts because they are intrigued by what their peers were posting. For example, one participant noted her desire to attend Travis Scott's

“Astroworld - Wish You Were Here Tour” because the experience of the show, complete with guest appearances, a rollercoaster, and even an inverted ferris wheel, was appealing, unique, and felt once in a lifetime. People now want to go to concerts for the overall quality and experience of the show.

When engaging with music artists online, one topic that came up was the idea of authenticity. What makes an artist authentic? Authenticity is what drives engagement and a lack of it can drive people away just as fast. To be authentic, according to the participants, artists need to be genuine and legitimate. An artist’s social media feed cannot feel like a marketing plea. The artist needs to show they are more than just a “famous person”. They must get personal. The participants enjoy seeing what the artists are passionate about. One participant mentioned Taylor Swift’s Twitter post about the thirty lessons she learned for her thirtieth birthday: “She wasn’t promoting anything, but it genuinely came from a newfound love of writing” (Participant F). Whether Taylor Swift posted to keep her name relevant or not, fans did not care because it appeared *genuine*.

When it comes to releasing music, participants stressed the importance of showing the creative process behind the songs and album. People want to know more than surface level facts about their favorite artists and social media is a gateway to that relationship.

When asked how social media has affected artist careers, the participants agreed that artists must be present otherwise they risk irrelevancy. Artists also recognize that they have to be online to maintain their fans, and will sometimes apologize if they are not. Kehlani and Kylie Jenner were provided as examples of people who have apologized for not being active on social media. One participant mentioned that Harry Styles rarely engages on social media, and his fans

get upset about it. “Artists signed to big labels need to be active because that is what their fan bases depend on” (Participant B).

In sum, to be relevant is to engage with fans regularly. Taylor Swift was mentioned as being great at branding and building audiences because of her social strategies. She uses clues, riddles, and lyric books on her Instagram; always making her fans believe she is coming out with new music. She also does not allow comments on her Instagram page, requiring fans to find different outlets to talk about her.

On the contrary, some participants believe that if the artist has a certain following then the artist does not necessarily need to be active on social media. Demi Lovato and Ed Sheeran took breaks from social media for a significant amount of, and they still have a massive following because they have a solid fan base. Artists can also mold their audience into accepting less frequent social media updates - which is what artists like Demi Lovato, Selena Gomez, and Ed Sheeran have done. One issue that came up with an artist’s digital activity is when the artist posts too much. Sometimes when an artist post too much, the participants feel less inclined to like that artist. Some participants noted that people are infatuated with stories, which is why they are turned off by some artists. There was a lot discussion surrounding Ariana Grande and her relationships with Mac Miller and Pete Davidson, and these storylines were used as content for her music, which generated a great deal of conversation on social media. One participant made it apparent that the noise around Ariana Grande was due to a lack of other female artists with music out at the time.

### **Marketing Strategies.**

Key promotional campaigns that stood out to the participants were broken into four categories: branding, loyalty, content, and experience. Branding ties in with how relatable the

artist is. Artists like Taylor Swift, Beyoncé, and Lady Gaga are so successful because they are incredibly marketable. They have a brand; they fit in a box. Artists who sell out stadiums across the world are able to do so because audiences can relate to them:

“It’s not about just making music, or having style, or having a successful song.

You have to have a platform. Beyoncé is black politics, Taylor Swift is love, Lady Gaga has the gay community. Bruno Mars has great hits and style, and he is recognizable, but he doesn’t have a platform that he sits on” (Participant A).

Although they do not have a social or political platform that they stand on, One Direction was mentioned as having a brand by just being a boy band of five attractive British males.

All marketing and promotion campaigns need to be cohesive and in line with their brand. Music fans want to latch themselves on to what the artist stands for. Showing their creative process can do this. As mentioned earlier, audiences want to see how the music came together. Participants enjoy learning about the ideas behind certain songs through videos and even podcasts, something George Ezra did with his sophomore album, “Staying at Tamara’s”.

Loyalty focuses on what the artist does for their devoted fans. Participants liked pre-advertising and marketing exclusive to dedicated fans. One drawback of exclusive promotions include the economic divide between fans. For example, Taylor Swift's "Reputation Tour" went on sale through Ticketmaster's Verified Fan program where fans had to register to purchase tickets and then also purchase merchandise should they want to have a higher probability of obtaining tickets. Contests are popular as well where fans are asked to submit videos for a particular song and then selected submissions were used in the music video.

Digital content is also a huge draw for fans. Music videos, teaser videos, sneak peeks and cryptic messages were all mentioned as being creative strategies to lure fans in. One participant

mentioned the cleverness behind the lead up to Ariana Grande's "Thank U, Next" music video. Ariana Grande released behind-the-scenes photos and videos throughout the week and had famous influencers, actors, and actresses make guest appearances in the video as well. Before Taylor Swift announced her single, "Look What You Made Me Do", she deleted all content off her social media, then posted partial pictures of snakes on her Instagram, which instantly got people talking. One participant mentioned that this lead up was rebranding in itself; "'Look What You Made Me Do' is not a song, it's a marketing ploy" (Participant E).

Participants are also impressed by the "art of the drop", which is when an artist uses very little marketing at all to release new music, yet this can only succeed if the artist is established enough. A-list artists are able to drop music in this way because they have huge fan bases that are always staying in tune with what the artist is doing. Fans are also intrigued by artists making comebacks, or artists who took breaks from music for a couple of years such as The Backstreet Boys and the Jonas Brothers. What also makes this strategy appealing is because the news of the drop spreads so quickly that fans get so excited and immediately join the conversation:

"When there are pre-advertising and marketing, usually they will use loyalty [programs], so you can spend money to preorder, so people who have the most money or the most resources can get the album first, but if you just drop it everybody is on the same playing field, so everybody panics and they buy that album... and that's how you make so much money" (Participant A).

Finally, being a part of an experience appeals to music fans. Fans jump at any opportunity where they can physically be a part of something special and "cool". One participant noted that Arctic Monkeys had a pop-up shop that sold limited merchandise. Ariana Grande had a series of promotional concerts called The Sweetener Sessions. Taylor Swift had a pop-up shop

with limited merchandise and an opportunity to take a picture on top of a throne. Exclusive photo opportunities make fans feel “cool” and allow for free promotion by the fans on social media, generating a conversation. Taylor Swift also put up a museum in New York City’s seaport district, complete with behind-the-scenes videos, costumes worn on stage, interactive pieces, as well as the piano used during her 1989 World Tour. Swift even made multiple appearances at the museum.

### **Label Perspectives.**

Participant attitudes towards record labels remained generally negative. From the participant’s view, labels limit artist creativity by compartmentalizing their brand, audience, and music. They know exactly how they want to market their artist to make the most money:

“[Record labels] don’t care about the fans, they care about what they are listening to. [Record labels] will pump out the same songs for years now because it is giving them money... There are some labels that listen to the musician and there are some that care about the fans, but the majority that I’ve seen don’t come off as that” (Participant F)

However, the participants did recognize that record labels are a business and it makes sense that they are money driven.

With social media, people are realizing that artists do not need to be under the control of a major record label to be successful. Some of the participants mentioned Chance the Rapper as a perfect example. Independent artists have greater outreach because they are able to appeal to a wide variety of people. The only caveat to this approach is that should the artist want to go "mainstream" it is much harder to gain millions of fans without the financial resources of a major

record label. The funding, connections, and power associated with the major labels are what make the artists incredibly successful.

### **Phase Three: Comparative Analysis**

Comparing the findings from the two phases of the research - the interviews and the focus groups - it is clear that social media has not only affected music consumption, but it has also affected the ways in which fans experience music. Music fans are now accessing their music from freemium or premium subscriptions on streaming services such as Spotify and Apple music, or from free social sites such as YouTube, and the labels understand this. While streaming services have hurt the record labels in revenue, they have benefited the labels with their use as an aid to pitch songs to program directors at radio stations. When songs are played on the radio, they perform better on the charts, thus they are more likely to be nominated for awards and fans want to see their favorite artists on award shows because it keeps them relevant. This provides new opportunities for fans to experience their favorite artists.

In terms of music discovery, fans rely more on online social platforms like Twitter and Instagram where they can see their peers posting about different artists. Labels understand the digital behaviors of their consumers and they accept that peer-to-peer interactions are much more influential than label-to-peer interactions. Even artist-to-peer interactions are stronger. There is a mutual understanding between both fans and labels that artists need to have a lively social feed to maintain their audiences.

The greatest divide between the fans and the professionals centered on the role of the record labels (see Figure 1). The participants felt strongly about the lack of control the labels provide the artists with in regards to their careers. This contradicts with the industry professionals as they heavily emphasized the importance of record labels to break through the

noise of social media and provide artists with the financial backings that are vital to ‘make it big’. The only mutual understanding came from the recognition that record labels are a business that relies on money. Should an artist want to go mainstream he/she will need to sacrifice some power over their brand and music.

What fans thoroughly enjoy about their music experience in the digital age is that it is an experience. Whether it is going to a live concert or an exclusive event, fans love being provided opportunities where they not only can connect with the artist, but where they can also post photos and videos on their social media feed, or buy limited merchandise to share with their peers online and in person. Interviewee C and D made it clear that their goal is to create memorable experiences for their fans, and the participants made it clear that they want to have an unforgettable experience. In this sense, music fans understand that the increasing responsibility of labels is to provide their consumers with experiences where they feel valued. Intimate events, stadium concerts, limited merchandise, surprise appearances from the artist, and exclusive content are all marketing strategies that resonate with music fans and make them want to continue to have a relationship with the artist. Sustaining that relationship with the artist means that fans are going to continue showing up to promotional events and live concerts, which is what drives revenue in the new structure of the music industry. This finding is reminiscent of Schivinski et. al.’s study in 2016 that emphasized the need for record labels to develop personalized relationships with consumers to foster engagement. While the music fans may feel as though labels hold the artists back, the music labels are giving the fans exactly what they want: engagement and experiences.

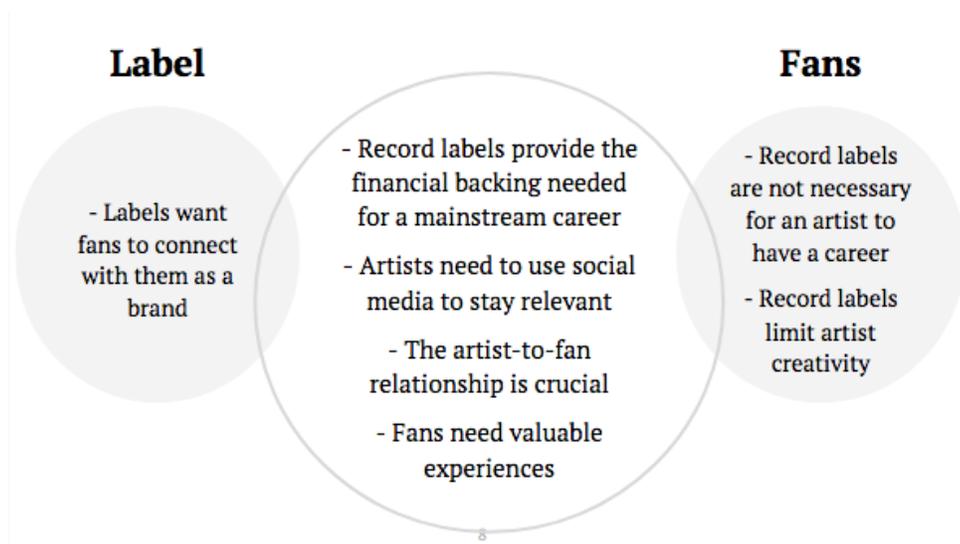


Figure 1.

### Discussion

The purpose of this triangular study was to investigate the changing operations of record labels as a result of social media platforms and how music fans are responding to these changes. After conducting interviews with music industry professionals, and focus groups with music fans, it was found that engagement and experiences are what music fans want from music artists. Social media provides engagement as well as a certain level of experience, but social media cannot be the sole method of marketing. Artists cannot have one vertical method. Artists themselves must diversify their marketing and outreach. Fans and labels understand that there needs to be a physical component to the music experience to continue to build and maintain audiences. Social platforms have provided fans with the power to discover new music by themselves and share their opinions about artists and their music. Additionally, social platforms have provided fans with more accessibility to their favorite artists than ever before. Now, there is

depth to their relationship and a mutual appreciation for each other. In agreement with previous studies (Ansari, 2018), the current study found that social media engagement is key to preserving this relationship.

The second conclusion of the data targets the desire for fans to experience the artist and the music, and the need for the labels to provide that. Music fans enjoy sharing their concert experience, music taste, artist interactions, and exclusive events on their social feed because it feeds their ego. They feel as though these activities will directly lead to an increase in societal status. Marketers are always trying to achieve that intangible quality of “cool” as they understand that is the driving force behind fan’s behaviors. But to make their products cool, they have to be authentic. This is the challenge; creating something authentic when self-promotion is anything but.

Labels recognize the importance of their fans, and they work to create mutual relationships with them so that they remain loyal consumers. While it is a gamble to determine which digital campaigns will make a positive impact, the marketing strategies used all relate to the idea of creating a value proposition for the fans. Labels have the financial means to create the experiences the fans want to attend and post about.

Overall, the digitized nature of the music industry has transformed the role of record labels. Previous studies (McCourt et. al, 2007, Choi et. al., 2013) discussed the changing nature of the industry where labels had to rethink how they were going to sell their artists. The music business is now an industry of service. The key finding of this research is that record labels recognize that they are selling their artists by providing fans with unique, memorable, and personalized physical experiences. Solely digital is not enough to keep fans entertained. Fans

need a second layer to their music experience that provides them with the opportunity to satisfy their own psychological needs.

This study does have limitations. Although the findings provide a detailed analysis of the relationship between record labels and music fans, there lacked diversity in the pool of interviewees as well as participants. There was not a wide variety of industry professions represented, and there could have been more interviewees to provide clearer insight into the challenging nature of the industry. Moreover, the participants were limited to only college students in New York City who were mostly female. Future research opportunities may look at the challenges in branding an artist in a digital society, the effectiveness of labels with up-and-coming artists, and the specific content of online conversations with music artists. Further research will require a greater understanding of the specific marketing strategies used as well as a closer look at online communication.

Looking to the future, digital platforms will continue to dominate how fans discover and consume music. Since physical sales are the preferred method of consumption financially, there will be a push by labels to get fans to buy CDs and vinyl's through various marketing methods including ticket bundles, exclusive content, artist signatures, autograph, event access, and merchandise packages. Sale numbers from albums and sales will weaken on the charts while touring sales will continue to accelerate. We will continue to see music artists on the road for longer periods of time, releasing albums more frequently to maintain their exposure in a noisy market. Fleeting from a product-based industry, the music industry will continue to grow into an experiential business working to satisfy, yet also manipulate, what their consumers need and want from their music experience.

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