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# **Keeping America Singing: Key Entertainment and Music Industry Themes During and Post-Pandemic**

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<https://doi.org/10.25101/21.1>

## **Abstract**

This article examines four entertainment and music industry themes that emerged during the COVID-19 pandemic and the resulting effect of such themes on the current entertainment and music industry landscape.

Keywords: COVID-19, force majeure, contract law, insurance, insurance disputes, litigation, alternative dispute resolution, livestreaming, concerts, touring, live events, social media, Facebook, Instagram, TikTok, Clubhouse, corporate collaboration

## **Introduction**

In addition to the unprecedented toll on mankind that COVID-19 caused as it shook the world, the entertainment and music industry's forced navigation of uncharted waters immediately became an adventure that no one expected and for which no one could plan. From suspension and cancellation of major tours and concerts to the shuttering and/or closing of countless music venues, at best, most of the industry faced severe disruption, or, at worst, unwanted dissolution. No matter how we individually define COVID-19's impact, most can agree that as a result of the pandemic, the music business and entertainment industry faced changes that will have long-term effects. In this article, the authors summarize four entertainment and music industry themes that emerged during the pandemic and discuss how those themes are playing out currently.

## Entertainment Industry Responses, Changes, and Solutions During and Post-Pandemic

COVID-19 impacted all aspects of the entertainment and music industry. In 2020, according to *Pollstar*, the live events industry expected to make \$12.2 billion but instead lost more than \$30 billion due to, among other things, “unreported events, ancillary revenues, including sponsorships, ticketing, concessions, merch, transportation, restaurants, hotels, and other economic activity tied to the live events.”<sup>1</sup> There was no one-size-fits-all response to the challenges faced during the pandemic. Responses to the COVID-19 virus have been as unique and varied as the virus itself. Although no exhaustive or exclusive list of solutions exists for our industry, certain legal and business response themes materialized that should be examined by all who have been impacted as we navigate our resilient industry. In response to the COVID-19 pandemic, certain collaborative and creative approaches have been developed by an industry that has always relied upon imagination, inspiration, and interconnectivity.

This article discusses four themes that emerged during the pandemic and that will have lasting effects post-pandemic with respect to entertainment and music business:

1. Stakeholders were forced to take a closer look at force majeure and related clauses in contracts and will continue to do so going forward as this language has proven to be critical in certain situations.
2. Stakeholders were obligated to dive deeply into the language of their insurance policies to answer novel questions related to coverage and will continue to pay very close attention to policy language going forward to ensure adequate coverage.
3. Artists had no choice but to pivot to livestreaming as a way to stay connected and generate revenue and will continue to use livestreaming as an important tool to engage with fans for promotion and other purposes.
4. New social media platforms emerged during the pandemic (e.g., TikTok) that remain extremely relevant to our industry as they caused artists and other stakeholders to think outside the customary digital box to continue growing, learning, and connecting.

### Contracts

Although every industry relationship is different, the first place to look for solutions to business relationships facing stress is to review the

parties' contracts. In theory, the contract should "hold the answer to any legal question the contracting parties might face."<sup>2</sup> Contracts allow the parties to customize the terms of their relationship, and as such, bring predictability to their interactions.

In the negotiation and drafting of contracts, some of the most important provisions that contracting parties seek to include are related to the allocation of risk. These clauses allow the parties to reasonably allocate the risks involved while also selecting a resolution that will work best for their own situation.<sup>3</sup> Although parties attempt to envision all the issues that might arise and impact the relationship, few contracts are designed to deal with unexpected or novel issues. Even though they do their best to foresee the future when drafting contracts, lawyers cannot be expected to predict an outcome that has never occurred.

In practice, force majeure and related clauses, such as impossibility and impracticability, have been utilized to deal with unforeseen circumstances. Force majeure began as an implied principle to excuse non-performance that resulted from an "act of God, [or] natural disasters such as earthquakes or floods," but it has grown to "encompass many man-made and man-caused events such as strikes, market shifts, terrorist attack[s], computer hacking, and governmental acts."<sup>4</sup> It now offers "a flexible concept that permits the parties to formulate an agreement to address their unique course of dealings and industry idiosyncrasies."<sup>5</sup> Force majeure is defined by *Black's Law Dictionary* as:

an event or effect that can be neither anticipated nor controlled; esp., an unexpected event that prevents someone from doing or completing something that he or she had agreed or officially planned to do. The term includes both acts of nature (e.g., floods and hurricanes) and acts of people (e.g., riots, strikes, and wars).<sup>6</sup>

Prior to COVID-19, the force majeure clause and others like it were often included in the boilerplate sections, tucked into the last provisions of normal commercial contracts. They were rarely utilized as these so-called "superior force" situations did not often arise. A typical example of a force majeure clause found in a tour-related contract is as follows:

Force Majeure: The parties agree that in the event of an act of God, riot, strike, disability, sickness, insurrection, war, natural catastrophe, or the exercise of authority of either the federal or state government or any political subdivision thereof, or any event beyond the reasonable control, including, but not limited to, vehicular mechanical failures or accidents that are not under either party's reasonable control (individually and collectively, "force majeure event(s)") that renders either party's performance hereunder impossible, or that renders either party unable to fully perform as required herein with respect to one or more concert performances on the Tour, then said party shall be relieved of its obligations under this Agreement for such concert appearance(s) and shall not be liable for any loss, cost or expense resulting from such failure to perform. Either party shall have the right to terminate this Agreement if a force majeure event, which renders the performance hereunder impossible, shall continue for seven (7) consecutive days.

Just as attorneys and business stakeholders frequently glossed over force majeure clauses in contracts, the COVID-19 pandemic abruptly stopped us in our tracks. Suddenly all interested parties dusted off their contracts to review this important clause while business shutdowns began wreaking havoc. As COVID-19 created unique challenges never before faced in our lifetime, industry stakeholders and their advisors were left to think outside the box while reviewing contracts in light of the pandemic. Most reviews began with answering the threshold question of whether the contract contained a force majeure clause. Generally, this sort of clause "excuses both parties from liability or a contractual obligation upon the occurrence of some extraordinary event or a circumstance beyond the control of the parties."<sup>7</sup>

After reviewing a contract and confirming that a force majeure clause is included therein, of utmost importance is determining how such clause defines the so-called "superior forces" that would rise to the level of excusability of the contract. The following necessary components typically exist for any force majeure claim:

- The claim must define the breach for which the promisor seeks to be excused;
- The claim must define the “force majeure event” itself;
- The claim must require (and define) the causal connection between these two; and
- The claim must explain what will happen if performance is excused.<sup>8</sup>

In order to invoke most force majeure clauses, the execution of the contract must be *impossible*, not just more burdensome or more expensive, unless the language of the contract says otherwise.<sup>9</sup> Further, attention must be paid to whether there are any notice and/or timing periods that must be met or followed. Special consideration to the language of the force majeure provision itself must be had as these cases are naturally very fact intensive. For example, “an entertainment company might be fully excused from its obligations to host a concert at a local amphitheater, but a construction contractor who was tasked with renovating the amphitheater may only be excused from performance until the force majeure event ceases.”<sup>10</sup> The determination of to what degree, and for how long, a particular party is excused from performance is typically found within the plain language of the contract.<sup>11</sup>

In case after case that has been filed in connection with the pandemic, the principal goal of the court in interpreting a contract is clear: accomplish the parties’ intentions. “Courts are loathe to rewrite agreements to reallocate risks they expressly assumed. Those intentions are manifested in the plain words of an unambiguous contract. Courts generally will not entertain arguments that the parties intended something that is contrary to what the contract says. They will not read an allocation of risk into a contract that does not exist.”<sup>12</sup> Whether the pandemic created a force majeure excuse is dependent upon a careful analysis of the facts and circumstances of each contract and each case.

The case of *NetOne, Inc. v. Panache Destination Mgmt.* illustrates that courts will hold parties to the words they use (or do not use) in their force majeure provision.<sup>13</sup> In this live event case, the pandemic was determined to be a force majeure event, relieving both parties from future performance under the contract even though the booking party had paid a substantial deposit.<sup>14</sup> Their claim was dismissed because the contract was clear that the force majeure provision relieved both parties of future performance, and “nowhere in the force majeure provisions does it say that, if

the contracts are terminated due to a qualifying event, the non-terminating party must return all deposits made.”<sup>15</sup> In a later decision, the Court reaffirmed its holding, suggesting that the booking party could bring an unjust enrichment claim.<sup>16</sup>

If a determination is made that a force majeure clause can be invoked, decisions as to how to proceed become critically important. Of course, litigation is always available as one course of action, but parties should carefully consider other possible solutions, such as alternative dispute resolution (ADR). Other options like ADR may prove to be more flexible and less expensive than the litigation process. At all times, communication with the other party should be the first course of action, even if one’s contractual position is weak.

Now that we have endured and continue to experience a global pandemic, there is no excuse to not plan for another world issue—especially as we move forward in business relationships. In so doing, contracting parties should meticulously select a resolution that works best for their individual situations.<sup>17</sup> As contracts are negotiated and drafted, risks and costs related to an unexpected catastrophe should be assessed and allocated.

Moving forward, force majeure clauses should be strengthened so there are no ambiguities—the more specific, the better—including being clear about whether a pandemic can form the basis for a force majeure event; defining “pandemic,” “epidemic,” and “endemic”; and setting forth definite guidelines on timing and impacts on performance.<sup>18</sup> Remember, no one can think of everything; therefore, a prudent stakeholder should consider including a broad-sweeping, catch-all provision.

Additionally, when drafting a contract, one should pay close attention to internal inconsistencies of the language and provisions of the contract. For example, in *Zhao v. CIEE, Inc.*, the Court noted that while the contract for a study program, which was interrupted by COVID-19, broadly allowed for refunds in the event of cancellation, it also had a waiver of liability stating that the company would not be responsible for any damage arising from an “epidemic.”<sup>19</sup> The student did not receive any refund as the risk of an epidemic was anticipated and dealt with in a different section of the contract.<sup>20</sup>

Vigilant scrutiny should also be afforded to dispute resolution clauses. If we have learned anything from the COVID-19 pandemic, it is that a litigated contract dispute may take a considerably long time to reach a final

resolution, and the resolution may not be what was anticipated when drafting the agreement. Contracting parties should determine whether there is a need to require some sort of alternative to litigation, even if only a mandated pre-litigation mediation or a form of alternative dispute resolution. In order to mitigate unfavorable results, we must re-evaluate how we negotiate and draft contracts as the world adjusts to life amidst COVID-19.

## Insurance

Besides entering into ironclad agreements that contain force majeure and related clauses, insurance has long been a way for businesses to transfer risk or the cost of doing business. Many commercial property insurance policies require physical damage (such as material alterations) to covered property as a basis for coverage.<sup>21</sup> Such policies also often contain exclusions such as virus, contamination, and/or loss of use.<sup>22</sup> In order to protect its specialized assets, the greater entertainment industry utilizes various other forms of insurance as well such as production and event cancellation insurance. Contrary to commercial property policies, whose contracts are often on standardized forms, language contained in policies covering production and event cancellation varies quite a bit.<sup>23</sup>

Event cancellation insurance, designed to protect the interests of venue owners, sponsors, promoters, and others, covers an extensive assortment of live events, such as festivals, athletic events, conferences, and concerts.<sup>24</sup> Obtaining these policies, especially those that cover cancellations due to pandemics, can be quite expensive.<sup>25</sup> Since the 2003 SARS outbreak, some policies contain exclusions for diseases, some allow for coverage in the event of disease outbreak, and some are silent, failing to mention disease outbreaks at all.<sup>26</sup> The All England Lawn Tennis & Croquet Club, which organizes the Wimbledon tennis tournament, was set to run from June 29 to July 12, 2020, but because of the pandemic, the tournament was canceled for the first time since World War II.<sup>27</sup> According to reports, organizers received a \$141 million payout from their pandemic insurance policy for which they had paid \$34 million in premiums over the prior 17 years.<sup>28</sup>

The causes of action available to a policyholder to determine if coverage exists for COVID-19 claims include breach of contract and declaratory judgment.<sup>29</sup> As part of any party's pleadings in any litigation, any exclusions and exceptions to coverage must be closely examined.<sup>30</sup> "An exclusion is a loss or a cause of loss that is not covered by the policy and

an exception is a policy provision that narrows the scope of an exclusion. An exception returns to the scope of coverage, in whole or in part, a loss or cause of loss that was excluded.”<sup>31</sup> If a policyholder contends that an exception applies that returns the loss or cause of loss to the scope of coverage, then such policyholder has the burden of proof.<sup>32</sup>

The language of the policy is central to the result of any insurance lawsuit. In litigation over what certain policy language means, “If it is found to be ambiguous (i.e., susceptible to more than one reasonable meaning, one finding that there is coverage and one finding that there isn’t), the outcome will usually be that coverage is found to exist.”<sup>33</sup>

Production insurance is another interesting type of policy that is unique to the entertainment industry. A production policy generally covers motion picture and television productions, such as casts, props, sets, wardrobes, miscellaneous equipment, etc.<sup>34</sup> This kind of insurance may come into play should a cast member become infected with COVID-19.<sup>35</sup> Various types of exclusions exist for production policies. Some exclude losses from a specified virus, while others may more broadly exclude losses arising from many diseases.<sup>36</sup>

In addition to commercial property, production, and event cancellation insurance, numerous other insurance options are available, including business interruption. Some of the most significant insurance-related lawsuits generated by COVID-19 involve the issue of whether insured businesses that were forced to cease operations during the pandemic had valid claims for coverage under their business interruption policies.<sup>37</sup> Legislators and regulators at both the state and federal levels disagree as to whether insurers are obligated to cover these types of claims.<sup>38</sup> The controversy stems from the provision in business interruption policies that typically requires a “direct physical loss arising from a covered peril to trigger coverage.”<sup>39</sup>

Many of the lawsuits that have been filed following COVID-19 alleged that coverage should apply despite the fact that there was no “physical loss” and despite that policies contained virus exclusions.<sup>40</sup> A considerable amount of cases referenced “stay home” government orders to claim loss under civil authority clauses in certain policies, which covers loss arising from business closure due to government action.<sup>41</sup> Complaints also alleged loss where problems with ingress and egress to insured premises caused business interruption.<sup>42</sup> See the following statistics, which high-

light the number of insurance cases related to business interruption claims that were filed in federal district courts during the listed time periods:

- March 2020 to December 2020 – 1,471
- March 2019 to December 2019 – 394
- March 2018 to December 2018 – 354<sup>43</sup>

In May 2021, Live Nation urged a California federal judge to allow its COVID-19 business interruption lawsuit against Factory Mutual Insurance Co. to proceed, arguing that its policy specifically includes communicable disease, and as such, constitutes “physical damage” under the policy.<sup>44</sup> At the time of this writing, the case, like many others related to COVID-19, is unresolved and awaiting a Court decision.

Other cases filed by music venues against insurers that remain unresolved at the time of this writing include suits filed by Raven and the Bow, a San Francisco music venue, and Till Metro Entertainment, doing business as The Vanguard, a concert venue in Tulsa.<sup>45</sup> Both plaintiffs alleged that their insurance policies covered losses suffered by COVID-19 while the insurers, First Mercury Insurance Company and Covington Specialty Insurance Company, argued otherwise.<sup>46</sup>

Another lawsuit involving a “cancellation, abandonment and nonappearance insurance” policy was filed by Metallica against their insurer in June 2021 after forced postponement of certain South American shows.<sup>47</sup> The insurance company denied coverage under a communicable disease exclusion, but the band argued that the South American shows were not postponed due to any feared threat of communicable disease.<sup>48</sup> In its complaint, the band accused underwriters of not investigating whether venues were actually closed by government order, among other things.<sup>49</sup> At the time of this writing, this case also remains unresolved.

Because of the flood of insurance-related lawsuits following COVID-19, Congress is reviewing the proposed Pandemic Risk Insurance Act of 2020, 116 H.R. 6983, which would enact certain protections for insurance industry losses.<sup>50</sup> In exchange for these protections, insurers would have to make business interruption coverage available for insured losses that do not “differ materially from the terms, amounts and other coverage limitations applicable to losses arising from events other than public health emergencies.”<sup>51</sup> The proposed Pandemic Risk Reinsurance Program would do the following:

- “Function as a reinsurer for commercial property and casualty insurers”;
- “Be administered by the Department of Treasury”;
- “Be triggered when industry losses exceeded a \$250 million threshold”; and
- “Cap aggregate losses at \$500 billion in a calendar year for both insurers and the government.”<sup>52</sup>

Peter Tempkins, the Managing Director of Entertainment for HUB International Limited, a global insurance brokerage, explained that once the novel coronavirus was recognized as a serious risk to public events, insurers began to exclude COVID-19 from most new policies.<sup>53</sup> According to Mr. Tempkins, “Everybody now knows about COVID-19 and so they want to buy coverage...But you can’t—it’s too late.”<sup>54</sup> Going forward, industry stakeholders should monitor the insurance industry to determine how it continues to respond to the pandemic and whether these types of insurance policies are made available again.

Existing, specialized entertainment policies must be extensively and continuously analyzed as policy forms and endorsements change over time and upon renewals. Policyholders must first scrutinize the policy that was in force on dates material to the loss because that is the particular policy on which any litigation would be based.<sup>55</sup> Determining the exact date of loss for claims related to COVID-19 is particularly confusing since some jurisdictions look to the date of local lockdown while others use different methods.<sup>56</sup>

In the future, when negotiating insurance policies, stakeholders must continue to prudently review the language. Decision makers should evaluate, perhaps by way of a decision tree, all possible scenarios—from full completion of an event to full loss, and everything in between. Having a mindset of partnership, understanding, and sharing mutual goals has always been a hallmark of the entertainment industry. The same principles also hold true for entertainment insurance. Relationships are important and should be preserved—even in the insurance arena.

## Livestreaming

Livestreaming is a new genre, a new form of entertainment. It is not ephemeral. People will doubt it—but I believe that it will stay and be a complementary form of entertainment that will compete with playlists and

videos and live shows. (Fabrice Sergent, co-founder of Bandsintown)<sup>57</sup>

As discussed, COVID-19 hit the entertainment and music industry harder than ever thought possible. With the cancellation of live events left and right, the industry was forced to take a hard look at alternate methods of income for artists and musicians. The music business quickly turned to livestreaming as a way to keep artists connected to fans while attempting to replace lost income. Virtual concerts existed long before the pandemic; however, the pandemic forced the music industry to consider virtual events as the new normal.

The live music sector continued to be disrupted in 2021, with the future of live, in-person music remaining an unknown. One thing has become clear: the innovations during the pandemic in livestreaming were not simply a band-aid to get the music business through the COVID-19 pandemic. The livestreaming innovations were the “foundations for permanent additions to the live music mix.”<sup>58</sup>

Live, in-person concerts used to be entirely separate from virtual concerts because live events required certain logistical assets like buildings, ticket-takers, parking, etc.<sup>59</sup> The pandemic has shown us that the livestreaming sector is its own standalone sector, successfully operating separate from traditional live events.<sup>60</sup> Over the past year-and-a-half, the music industry has learned what does and does not work when it comes to livestreaming, and fan engagement has shown that although livestreaming will never serve as a full replacement of a live concert, the livestream experience will continue to exist in a complementary lane of its own far beyond the pandemic.

Before discussing the success of livestreaming amidst the pandemic, we should look at the reality of what was lost during 2020. During the first quarterly analysis of 2020, box office tallies showed an increase of 10.9 percent in overall gross revenue and sold tickets for the top 100 tours as compared to the first quarter of 2019.<sup>61</sup> By the end of 2020, totals reported for events that occurred during the first quarter of 2020 showed an even higher percentage of growth during the first quarter than initially anticipated.<sup>62</sup> Had the global pandemic not occurred, 2020 may have produced the first \$12 billion year in box office earnings worldwide.<sup>63</sup> Because the majority of live events were canceled as a result of COVID-19, touring revenues plummeted in 2020 and totaled only \$1.2 billion, far less than

the \$5.5 billion of total gross revenues achieved in 2019.<sup>64</sup> “What was projected to be the highest grossing year in live entertainment history has resulted in 90 percent loss due to the pandemic,” said Henry Cárdenas, President and CEO of the Cárdenas Marketing Network.<sup>65</sup>

In March 2020, once the entertainment and music industry began to surrender to the reality that life might never be the same, the industry turned to livestreaming as a method of survival. Livestreaming is a format that has been around for many years but assumed new importance and increased demand during the pandemic.<sup>66</sup>

Some of the first livestreams of the pandemic consisted of grainy, poor-quality footage shot from cell phones and broadcast from living rooms.<sup>67</sup> However, as 2020 progressed, artists acclimated to the new medium and started investing in better production (as evidenced by startup livestream companies popping up during the pandemic, which are discussed more below) and even left home for exciting venues like the Grand Canyon.<sup>68</sup> LiveXLive Founder, Chairman, and CEO Rob Ellin stated, “This is the next generation music video. It’s driving audio sales. It’s going to drive ticket sales when live comes back. It’s not just about the livestream, it’s about the curation. It’s about delivering something unique.”<sup>69</sup>

The Grand Ole Opry pivoted to livestreaming early on and excelled at delivering unique and high-demand content during 2020 and 2021. The Grand Ole Opry / Circle Live was named the 2020 Top Streamer by *Pollstar*<sup>70</sup> When the Opry learned on March 13, 2020 that it would have to close its doors to live audiences, it was uniquely positioned to quickly (i.e., in less than twenty-four hours) pivot to livestream with the help of Circle, the country music lifestyle streaming channel that it launched in January 2020 with Gray TV.<sup>71</sup> Circle Network’s Opry livestreams amassed 18.7 million viewers in the third quarter of 2020, demonstrating the Opry’s worldwide appeal.<sup>72</sup> The year ended with a whopping 30.3 million viewers and 88,347 shares for Circle Network’s Opry livestreams.<sup>73</sup> The Circle Network Opry livestream featuring Vince Gill and Reba McEntire on July 18 was also the ninth-ranked individual livestreamed show in 2020 according to *Pollstar*, with 2.6 million viewers.<sup>74</sup> “Almost simultaneously, our strategies began to include widening the show’s distribution through livestreaming and the Opry’s new network, Circle Television, to showcase the Opry and the artists on its stage to a larger audience than ever before,” Dan Rogers, the Opry’s VP and Executive Producer told *Pollstar*.<sup>75</sup> “Within a day of having paused shows with a live audience in the Opry House,

fans across the country and around the world who were sheltering in place could watch the Opry on their televisions, computers, and smartphones.”<sup>76</sup>

Like the Opry, others were quick to adapt in 2020 and pivot to livestreaming as a means of staying connected to fans. Twitch reported that livestreams boosted viewership of its Music and Performing Arts category of streams from 92,000 to 574,000 average viewers in the period from March 8 to March 22.<sup>77</sup> Almost immediately, artists embraced their new normal in quarantine and found ways to perform “live” on platforms like Instagram and YouTube, rallying around hashtags like #Together-AtHome.<sup>78</sup> John Legend and Chrissy Teigen connected with fans via Instagram for an hour on March 18, 2020, with Legend casually playing fans’ song requests as Teigen read comments from fans while wrapped in a bathrobe sitting on the piano near Legend.<sup>79</sup> On March 16, Coldplay’s Chris Martin played acoustic versions of the band’s hits on Instagram Live, and Swae Lee of rap duo Rae Sremmurd drew nearly 250,000 viewers for his solo show on March 20.<sup>80</sup>

Later, on March 30, 2020, Elton John hosted a livestream benefit concert with iHeartRadio, with artists including Billie Eilish, Billie Joe Armstrong, and Dave Grohl, all performing from their homes.<sup>81</sup> Then, in April 2020, more than 27 million people logged into the video game platform “Fortnite” to attend a live event featuring a performance by rapper Travis Scott.<sup>82</sup> WaveXR Inc. and TikTok also collaborated on a live event in August 2020 that featured artist The Weeknd and garnered approximately 3 million viewers.<sup>83</sup>

Early during the pandemic, with the exception of a few big names like Travis Scott and The Weeknd, many livestream performances were random, impromptu, and free of charge.<sup>84</sup> As the days and weeks passed, however, artists began adding high-quality lighting, special effects, and varied camera angles, and even started making their shows exclusive, pay-per-view events.<sup>85</sup> Ticket prices to livestream shows vary but are often around the \$15 mark.<sup>86</sup> Dua Lipa’s livestream show on November 27, 2020 priced tickets in the \$15 to \$20 range while Billie Eilish charged up to \$30 for her October 24, 2020, livestream from Los Angeles.<sup>87</sup> Dua Lipa’s show took five months of planning and sold 284,000 tickets.<sup>88</sup> Eilish’s fans who purchased tickets were not only given access to the livestream, which they could re-watch for up to twenty-four hours, but also discounts on merchandise.<sup>89</sup>

The ability to participate in something exclusive appears to correlate with ticket prices. Fans of folk artist Jason Isbell paid \$100 in July 2020 to watch a live performance and gain access to a special Q&A session afterwards.<sup>90</sup> Isbell added the option to pay an extra \$25 to receive a recorded version of the livestream event.<sup>91</sup> While the topic will not be discussed here, worth noting for further research and discussion is artists' potential violation of the exclusivity requirements of their record deals when creating or authorizing the creation of "records" from their livestream events.

Nugs.net followed the livestream frenzy and created a popular series called "Metallica Mondays" which consisted of weekly archival concerts streamed by Metallica to benefit their All Within My Hands Foundation.<sup>92</sup> Metallica later staged its only 2020 show, a pay-per-view livestream in November, which raised \$1.3 million for charity.<sup>93</sup> Tickets for the livestream started at \$15, but a \$95 option allowed fans to appear on screen with the band members, who could interact with them in real time.<sup>94</sup>

Another livestream success story involved San Francisco's Outside Lands music festival, which went digital on Twitch, calling itself "Inside Lands."<sup>95</sup> The revamped Inside Lands festival consisted of a mix of livestreams and archival sets, with commentary and Q&A opportunities.<sup>96</sup> The festival was able to extend its reach to millions of people and, for the first time, create a global audience that far surpassed the number of fans who could fit in a physical venue.<sup>97</sup> The ability to reach a vastly larger audience is certainly a significant appeal of livestreaming for artists, and fans see this as an opportunity to see a live show that they otherwise may have been unable to attend in person due to geographical or venue size limitations or otherwise.

Other successful livestream events include Post Malone's Nirvana Tribute, Offset's Oculus/Facebook Festival, and Kaskade's performance at the Grand Canyon.<sup>98</sup> The list goes on and on for artists who, perhaps not initially by choice but rather out of necessity, embraced livestreaming as a source of connection and monetization. Data from music industry analysts show that tickets and merchandise for livestreamed shows generated \$600 million in revenue in 2020 and increased nearly 300 percent from June to November 2020.<sup>99</sup>

Not all virtual events have been expensive, complex, visually stimulating experiences like the Travis Scott, Billie Eilish, and Dua Lipa performances. During the pandemic, artists and companies were able to experiment and see what resonates with fans in order to make livestreaming a

continued viable revenue source post-pandemic. The casual shows, which may not have the best audio quality and where artists are playing inside their homes and sometimes distracted by things happening around them, have proven to be very endearing to fans.<sup>100</sup> These laid-back, no-budget shows allow fans to have a glimpse at real life, without all the makeup and expensive outfits.<sup>101</sup>

The necessity and demonstrated success of livestream concerts during the pandemic caused many new companies to emerge and existing companies to expand their services to include livestream capabilities. StageIt was an early company in the livestream space, starting around 2012 and recognized by *Billboard* that year as one of the Top 10 Music Startups.<sup>102</sup> According to its website, StageIt is an “online venue where artists perform live, interactive, monetized shows for their fans directly from a laptop, offering fans unique experiences that are never archived... Artists decide when to play, what to play and how much they want to charge. Fans then buy virtual tickets to the show using [StageIt’s] virtual currency called ‘Notes.’”<sup>103</sup> Artists who have used the StageIt platform for livestream shows include Ingrid Michaelson, Jimmy Buffett, Jason Mraz, Plain White T’s, Korn, Indigo Girls, Sara Bareilles, and more.<sup>104</sup>

Other veteran livestream companies like nugs.net, YouTube Music, and LiveXLive continued to crack the livestreaming code during the pandemic and will do so post-pandemic, developing strategies to engage viewers, monetize content, integrate merch sales, and bring a high-quality product to fans worldwide.<sup>105</sup> Newcomers in the space like Mandolin and NoonChorus quickly racked up shows in 2020, becoming livestream hubs.<sup>106</sup> Mandolin launched at the beginning of the pandemic and teamed with venues like Ryman Auditorium and City Winery to unite monetization, merchandising, and VIP experiences, with plans to provide a hybrid model of live, in-person and livestreaming performances so that fans can choose the best experience for their specific needs.<sup>107</sup>

In January 2021, Live Nation announced that it acquired a majority stake in Veeps Inc., a livestreaming company that hosted almost 1,000 ticketed streaming shows in 2020.<sup>108</sup> Live Nation also outfitted 60 physical venues across the country with livestreaming technology.<sup>109</sup> In addition, Sony announced that it had launched a division called Sony Immersive Music Studios to produce a series of ticketed virtual concerts.<sup>110</sup> Other notable transactions include Melody VR’s purchase of streaming service Napster, Scooter Braun’s investment in virtual concert company Wave that

was founded in 2016, and TIDAL's \$7 million purchase of interests in virtual concert space Sensorium.<sup>111</sup> Wave even announced that it raised \$30 million in funding during the pandemic and will use the funds to expedite expansion into global markets including Japan and China.<sup>112</sup>

These types of investments indicate that livestreaming will continue to play an important role in the music industry far beyond the reopening of in-person shows. MIDiA Research lead music analyst Mark Mulligan stated, "Livestreamed concerts will be a long-term part of the music market, not just a lockdown stopgap."<sup>113</sup>

Music industry stakeholders agree that although livestreaming will never replace the live, in-person music experience, livestreaming is not going away. Dave Brooks, *Billboard's* Senior Director of Touring and Live, stated, "I don't think streaming will replace concerts. I think streaming performances will become their own category of what artists offer their fans."<sup>114</sup> Brooks went on to say, "There will likely be a small group of artists who figure out how to make more money from streaming [than live, in-person shows] and a smaller group who stop touring and only stream. Streaming will gain in popularity for artists as an alternative to touring, which is expensive and requires being on the road for long stretches of time."<sup>115</sup>

After being around for more than a decade, livestreaming has improved during the pandemic and proven itself to be an effective platform that will continue gaining traction in our post-pandemic music business. Live Nation has already confirmed twice as many major tour dates for 2022 than in 2019.<sup>116</sup> As artists continue to get back to business post pandemic, livestreaming can and will be a useful tool in marketing a new tour or album, as well as creating branding partnerships.

## Social Media

Another major change during the COVID-19 pandemic involved our daily routines, which inevitably created a new normal for how and when we use technology. As a result of social distancing and working remotely during the pandemic, creators, fans, music industry executives, and educators craved connection. Social media became a critical component of quarantine as "stay at home" orders were issued rampantly in 2020, with rippling effects into 2021 and beyond. Artists, fans, and industry affiliates began utilizing social media like never before. With more time spent on social media, consumers started using new platforms and discovering new

talent. Social media engagement does not seem to be slowing down any time soon, and it remains a viable tool that some would consider crucial for artists and industry affiliates post-pandemic.

The pandemic certainly changed engagement with social media and how consumers use the available platforms. The year 2020 saw an increase in social media usage throughout the day, especially during 9:00 a.m. to 5:00 p.m. working hours.<sup>117</sup> After the workday ends, there has been a decrease in social media use as a result of family and home needs.<sup>118</sup> Social media usage was 10.5 percent higher in July 2020 as compared to July 2019.<sup>119</sup> Of 4,500 individuals surveyed, 72 percent responded that their social media consumption increased during the pandemic, and 43 percent responded that their number of social media posts increased.<sup>120</sup> Historically, we have seen Generation Z and Millennials at the forefront of social media usage, but Baby Boomers started implementing social media into their daily habits during the pandemic as well.<sup>121</sup>

With consumers' usage of social media drastically increasing, artists have correspondingly seen substantial upticks in their fan engagement on social media. Indie act Penelope Isles took followers behind the scenes via Instagram Stories and Facebook Live to show the process of recording a new album during quarantine.<sup>122</sup> Connecting with fans in this way resulted in a 94 percent increase in video views on Instagram and an 88 percent increase in overall followers.<sup>123</sup>

For artists, brands, and influencers, the strategy behind posting content to social media also changed during the pandemic. Before the pandemic, the most optimal times for posting on Facebook were Wednesdays at 11:00 a.m. and between 1:00 p.m. and 2:00 p.m.<sup>124</sup> Following lockdown orders, when social media use skyrocketed during the workday hours, the most optimal days for posting on Facebook were Mondays, Wednesdays, and Fridays between 10:00 a.m. and 11:00 a.m.<sup>125</sup> Posts after 5:00 p.m. have lower engagement because focus changes to home and family after "office" hours.<sup>126</sup> Pre-pandemic, the best times to post to Instagram were Wednesdays at 11:00 a.m. and Fridays between 10:00 a.m. and 11:00 a.m.<sup>127</sup> User engagement was fairly consistent in the early mornings and late evenings throughout the week before the pandemic. Weekends, particularly Sundays, were the worst time to post.<sup>128</sup> However, during the pandemic and with more users on their phones while working remotely, the best times to post to Instagram became Mondays, Tuesdays, and Fridays at 11:00 a.m. and Tuesdays at 2:00 p.m.<sup>129</sup> Weekends between 9:00

a.m. and 5:00 p.m. also saw a substantial increase in engagement during lockdown.<sup>130</sup> The optimal posting times will likely continue to evolve as businesses create their new “normal” and allow for continued work-from-home policies.

Not only did the popular times for user engagement change during the pandemic, but the type of content being shared also saw a major shift. People began using social media as a way to foster community, causing content to become much more raw, unplanned, and authentic.<sup>131</sup> “COVID has changed the type of content that’s being created. We crave connection online because the real-life kind has been taken away from us,” said TJ Leonard, CEO of Storyblocks.<sup>132</sup> “DIY creativity is at an all-time high. People, brands and everyone are so starving for human interaction that the content we’re seeing now is a little more honest, a little more direct, a little more personal and human.”<sup>133</sup>

The change in the type of content being shared has resulted in new platforms rising in popularity and veteran platforms wisely developing ways to stay competitive. Zoom rose in prominence during the pandemic, becoming the go-to application for “face-to-face” meetings. Facebook launched Rooms as a competitor to Zoom, Instagram rolled out Instagram Reels for short-form videos, and YouTube announced YouTube Shorts for the same purpose.<sup>134</sup> Other platforms that gained traction during the pandemic included Google Hangouts, WhatsApp, newcomer Clubhouse, and most notably, TikTok.

Each platform serves a different, distinct purpose, informing which of them generated the highest engagement during the pandemic. For example, Facebook has “serious content, news, and personal updates”; TikTok has “personal updates, but with funny memes and entertaining video”; and Instagram is “a melding of the two; news shares, memes, videos, life snapshots.”<sup>135</sup> User goals and needs during the pandemic (i.e., connection, fun, and entertainment) and even things they did not know they needed (e.g., crafting, makeup tutorials, social commentary, comedy, and, of course, dances) were best met by TikTok, as evidenced by its spike in popularity.

TikTok arrived in the United States in August 2018.<sup>136</sup> Before the coronavirus pandemic, for those who had heard of TikTok, it was seen as a hub for Generation Z where the younger generation posted funny dancing videos.<sup>137</sup> However, in February 2020, TikTok was downloaded 113 million times, resulting in 800 million active users.<sup>138</sup> By April 2020, TikTok

had been downloaded more than 2 billion times, making it the most downloaded app of 2020 and resulting in an estimated 850 million monthly active users by fall 2020.<sup>139</sup> With the rise in usage, the demographics of users also changed, with 28.8 million adults in the United States using the platform in mid-2020 as compared to 14.2 million in March 2019.<sup>140</sup> In 2021, TikTok had approximately 100 million active users in the United States, up 800 percent from January 2018.<sup>141</sup> Astonishingly, the fifty biggest accounts on TikTok have around 500 million followers.<sup>142</sup> A significant amount of TikTok's growth comes from older social media users, who previously looked at the platform as silly and immature but quickly changed their tune at the onset of quarantine when they craved easy and fun entertainment.<sup>143</sup>

With respect to the music business, Ole Obermann, Global Head of Music at TikTok, stated, "We at TikTok share our community's passion for music and we're dedicated to providing a platform where artists and fans can interact and thrive. It has been inspiring to watch our community bring new talent to the forefront, help send songs up the charts, and use music to create an oasis of joy during a trying time. We will continue to work hard to make TikTok a platform that supports artists and encourages musical engagement and discovery."<sup>144</sup>

The rise of TikTok has made a substantial impact on the music industry when it comes to discovering new music and reinvigorating hits from existing catalogs. As live music venues were out the window during the pandemic, TikTok filled the communal music experience void.<sup>145</sup> It became America's go-to platform for discovering new music and launched the careers of many artists.<sup>146</sup> Over 176 different songs exceeded one billion video views on TikTok in 2020. Some of the most significant TikTok songs racked up over 50 billion video views, and 5 of them reached number one on the *Billboard Hot 100*.<sup>147</sup> Almost 90 songs that trended on TikTok in 2020 made it to the Top 100 charts in the United States, with 15 of those reaching number one on a *Billboard* chart.<sup>148</sup> In 2020 alone, over 70 artists who broke on the platform signed major record label deals, including Priscilla Block, Dixie D'Amelio, Powfu, Claire Rosinkranz, and Tai Verdes, and dozens more have charted on *Rolling Stone's Breakthrough 25*.<sup>149</sup>

TikTok not only won as the platform for new music discovery, it also demonstrated how the platform can turn existing catalog cuts into viral

hits. The ten fastest songs in 2020 to reach one billion video views on TikTok were as follows:

1. “Toosie Slide” - Drake
2. “WAP” (featuring Megan Thee Stallion) - Cardi B
3. “Therefore I Am” - Billie Eilish
4. “Let’s Link” - WhoHeem
5. “Say I Yi Yi” - Ying Yang Twins
6. “Where Is The Love?” - The Black Eyed Peas
7. “Whole Lotta Choppas” - Sada Baby
8. “Adderall (Corvette Corvette)” - Popp Hunna
9. “Mood Swings” - Pop Smoke
10. “THICK” - DJ Chose & Beatking<sup>150</sup>

The above list shows that the TikTok community embraces both old and new music, with some of the songs having never been heard until their viral breakthroughs and others being released almost two decades ago.<sup>151</sup> Many catalog songs experienced a massive increase in streams as a result of being used on TikTok, including Fleetwood Mac’s “Dreams,” which re-entered the *Billboard Hot 100* after a forty-three-year absence.<sup>152</sup> TikTok has shown us that a viral song can come from any year, any genre, or any artist.

Another platform that made its mark on the music industry during the pandemic and continues to remain viable is Clubhouse, which launched in April 2020.<sup>153</sup> Pre-COVID, artists, music industry executives, and other entertainment stakeholders networked at bars, music venues, and industry conferences. With lockdown orders in effect, Clubhouse became the new hub for exchanging ideas and information. Clubhouse allows users to host and join real-time, audio-only conversations about a plethora of topics including those related to the music business. The app has risen in popularity because it combines the communal interaction of platforms like Instagram with the information aspects of Zoom webinars.<sup>154</sup> Users can hop from chat room to chat room and participate in live, panel-style discussions regarding any topic they find interesting.<sup>155</sup> At the time of this writing, the app is still in beta testing and is currently invitation-only, but it has attracted international attention as big names like Mark Zuckerberg, Drake, Scooter Braun, Elon Musk, and Oprah Winfrey have joined the platform.<sup>156</sup>

Clubhouse has been especially helpful to the music industry because it has provided a space for industry professionals to discuss cutting-edge

concepts like non-fungible tokens (NFTs), the future of live events, branding and sponsorships, and more.<sup>157</sup> In early 2021, one Clubhouse room featured Timbaland, Scott Storch, Mike Dean, and Jozzy, among others.<sup>158</sup> This group of acclaimed musicians discussed tips for producers, the future of music production, and shared their unique industry insights and experiences, attracting thousands of listeners.<sup>159</sup> Scooter Braun also holds regular virtual parlors on Clubhouse speaking with other music industry moguls while users enjoy the Master-Class-level conversation free of charge.<sup>160</sup> Dozens of rooms like these are hosted on Clubhouse every week with top music executives and artists discussing experiences and trends and offering advice for navigating the industry.<sup>161</sup> The creative community on Clubhouse has also used the platform to offer virtual jam sessions, songwriting workshops, and album premiere parties.<sup>162</sup>

As of February 2021, Clubhouse boasted 2 million active weekly users with a \$1 billion valuation, making it one of the world's largest social media startup companies.<sup>163</sup> The active user count increased to 10 million active users by May 2021.<sup>164</sup> Clubhouse has announced that it plans to invest in creators, including a Creator Grant Program and monetization features, such as tipping, ticketing, and subscriptions.<sup>165</sup> While the future of Clubhouse is uncertain as it remains in beta mode, the music industry has found plenty of ways to utilize the platform, and it remains an excellent resource for the exchange of information related to the industry.

## Conclusion

The entertainment and music industry looks very different in our COVID world. During the COVID-19 pandemic we witnessed deep dives into critically important contract clauses like force majeure, conversations with insurance companies involving intricacies of policy language and coverage disputes, a total reliance on livestreaming as a method of industry survival, and substantially increased engagement on social media and its latest and greatest platforms like TikTok. As a result, our industry learned that it could withstand even the most taxing crisis and get to the other side with an appreciation for new approaches, tools, and resources that it would not have otherwise explored. Going forward in our new “normal,” we will see our industry stakeholders pause and pay closer attention in contractual and insurance dealings and utilize digital assets like livestreams and social media platforms to the fullest extent possible.

As our wiser and more informed industry begins its comeback, corporate collaboration and maintaining relationships is more important than ever. During a tremendously challenging time, we have seen individuals unite for the benefit of the whole and collaborate within the entertainment industry like never before. Employment challenges have been met on many levels—from remote work options and requirements to vastly improved technology. We have seen ticket companies and venues positively engage with concerned ticket holders, and artists maintain and even increase connections with fans. By reexamining conventional channels of communication, we have continued to shape our business. Through these uncharted times, the entertainment and music industry has risen to the occasion and developed creative business solutions to existing processes as it seeks to protect long-standing relationships. Our industry has always relied upon imagination, inspiration, and interconnectivity, so it comes as no surprise that our creators and stakeholders continue to work together tirelessly and passionately to keep America singing.

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# Linking Creative Practice with Audio Production Education in the Music Industry Classroom

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## Abstract

Since the inception of audio production programs a schism has existed between creative practice (e.g., composers) and technical roles (e.g., audio engineering). However, as the democratization of technology has been integrated into modern audio production workflows, contemporary audio professionals and students are increasingly seeking ways to combine music creation and recording, editing, and mixing. As a result, there is a demand for audio production programs to develop curricula that links creative practice with commercial audio production education in the classroom. This paper a) identifies the ambiguity when defining contemporary audio production programs, b) describes the educational goals of current audio production students to prepare themselves for employment in the contemporary music industry, and c) details the five phases of creative practice for the development of critical thinking skills, troubleshooting, and the ability to work under the authority of a mentor. In addition, this paper describes a Basic Creative Recording Project (BCRP) which balances technical learning objectives while incorporating the acquisition of creative practice skills in the classroom. The BCRP project schedule is detailed with examples for meetings and assignments. A process-based assessment is described and includes detailed session documentation, recursive feedback loops, and verbal presentations. Infusing the creative process within an audio production project can help to engage students in the classroom who are already involved in the creative process.

Keywords: audio education, music industry, music industry education, experiential learning, assessment

## Introduction

A tonmeister is an audio recording professional who is trained in music, acoustics, physics, and mechanics, and has the ability to control and improve the sonority of recordings, radio broadcasts, and sound films as defined by Arnold Schoenberg in the 1940s (Borwick 1973a; Borwick 1973b; Bielmeier 2013b). Schoenberg, an influential composer of the twentieth century, identified this training as essential not only for recording, but for the creation and execution of future creative works. Unfortunately, many educational institutions did not embrace the tonmeister educational ideal. In fact, as music education progressed throughout the twentieth century, audio production programs separated recording from creative practice and specialized in technical, scientific, and competency based educational models (Gadhoke 1978; Lodge 1978; Stockham 1977; Gander 1978; Manquen 1978). Nevertheless, contemporary audio production professionals often find themselves in roles that require them to be both content creators and content editors (Lankford 2018). These modern audio workflows and work environments mirror the deep and cross-disciplinary training described by Schoenberg almost one hundred years ago.

Many contemporary educational institutions segregate learning of students wanting to train as content creators (e.g., composers) or as content editors (e.g., recording engineers) (Phillips 2013). This delineation of academic majors was effective for previous generations of students who entered technical programs to engage with, and have access to, expensive and sophisticated technology (Lightner 1993; Sanders 1994; Walsh 1996). However, the democratization of technology has enabled students to gain experience with software, recording, and music creation prior to enrollment in an audio educational institution (Tough 2009; Tough 2010). Moreover, most students matriculating in audio production programs already engage in creative practice (Bielmeier 2017; Merchant 2011). Specifically, students use laptops and simple production software to create musical works ranging from four-bar loops to sophisticated orchestrations.

This experience with home recording has influenced students' expectations of audio production education threefold. First, many students view their audio production education as a method to refine their existing creative practices (Bielmeier 2017). Traditional composition programs often require a high level of musical aptitude for performance and sight-reading, which may not be required for a student's personal creative pursuits (Phillips 2013). Second, many students are not interested in earning a degree

in solely traditional composition at a rigorous or conservatory level, but rather are combining audio production with other majors such as music industry or electrical engineering (Bielmeier 2017). Third, students are often not interested in learning skills not directly connected to a job in an audio production studio or the music industry (Tough 2010; Bielmeier 2017; Merchant 2011).

To reflect the modern student, some institutions have created Music Technology programs, which are a blending of traditional composition programs and audio production programs mediated through technology (Phillips 2013). However, little to no research exists on these relatively new programs, and thus their efficacy and ability to prepare students to work in the audio production and music industries is unknown. Furthermore, best practices for creating purposeful music technology classrooms are limited.

This paper provides best practices in linking creative practice within commercial audio production education at the classroom level. It a) identifies the ambiguity when defining contemporary audio production programs, b) describes the educational goals of current audio production students, and c) details the five phases of creative practice. In addition, this paper describes a Basic Creative Recording Project (BCRP) which balances technical learning objectives while incorporating the acquisition of creative practice skills. The BCRP project schedule is detailed with examples for meetings and assignments. A process-based assessment is described and includes detailed session documentation, recursive feedback loops, and verbal presentations.

## **Ambiguity in Contemporary Audio Production Education**

Future sound recording technicians (e.g., recording and mix engineers) who work in the audio production industry are commonly trained in formal audio production programs (Gadhoke 1978; Gander 1978; Lightner 1993; Lodge 1978; Maquen 1978; Merchant 2011; Sanders 1994; Stockham 1977; Tough 2010). Audio education students can select educational institutions ranging from short certification programs to four-year tonmeister programs. These audio educational programs vary in awarded degree, length of matriculation, area of focus, and educational setting (e.g., university department or within a business) (Phillips 2013). As a result, there is currently no one definition for formal audio production education, which causes confusion about what skills students have acquired based

on education type (Bielmeier 2013a; Bielmeier 2013b; Bielmeier 2016). When looking at just four-year bachelors-level degrees, the focus of rigor is commonly influenced by where the education is taking place (as shown in Table 1). More specifically, music and fine art degrees focus more on musical training while the bachelor of science programs focus more on computer programing, engineering, and acoustics. Surprisingly, however, this is not always the case. When reviewing course requirements and objectives of several major U.S. audio production programs, many include a large number of elective courses in both music and sciences and allow for minoring in related technical fields (Bielmeier 2018; Bielmeier 2019). In addition, there is a lack of consistency in program titles across all audio production programs in the United States (Phillips 2013). There are several program titles that are the same regardless of the college from which the degree is awarded, which is surprising because previous research suggests that these programs have different areas of rigor (Phillips 2013; Lightner 1993; Sanders 1994; Walsh 1996). It is unclear whether this ambiguity in focus of rigor hinders student as they seek employment after completing training.

<b>Audio Production Degree</b>	<b>Fields of Rigor</b>	<b>Program Titles</b>
Bachelor of Music (BM)	Music Theory, Ear Training, History, and Applied Instrument, Ensemble	<ul style="list-style-type: none"> <li>• Media <b>Music</b></li> <li>• <b>Sound Recording Technology</b></li> <li>• <b>Music Technology</b></li> <li>• <b>Recording Arts &amp; Sciences</b></li> </ul>
Bachelor of Fine Arts (BFA)	Music Theory, Ear Training, History, and Applied Instrument, Ensemble	<ul style="list-style-type: none"> <li>• <b>Audio Recording &amp; Sound Design</b></li> <li>• <b>Music &amp; Audio Technology</b></li> <li>• <b>Audio Engineering</b></li> </ul>
Bachelor of Arts (BA)	Breadth Across Disciplines (Liberal Arts Educational Philosophy)	<ul style="list-style-type: none"> <li>• <b>Audio Production</b></li> <li>• Computer <b>Music &amp; Multimedia</b></li> <li>• <b>Recording Industry</b></li> <li>• <b>Music Industry</b></li> <li>• <b>Commercial Music</b></li> <li>• <b>Music Technology</b></li> <li>• <b>Sound Recording Technology</b></li> </ul>
Bachelor of Science (BS)	Science, Computer Programing, Engineering, Electronics, Acoustics, Manufacturing	<ul style="list-style-type: none"> <li>• <b>Audio Technology</b></li> <li>• <b>Music Industry</b></li> <li>• <b>Music Media Production &amp; Industry</b></li> </ul>

Table 1. Types of audio production degrees with field of rigor and program titles for four-year bachelor's degrees (Phillips 2013).

Many graduates of formal audio production programs seek employment in the audio production industry (Bielmeier 2013a; Bielmeier 2016; Lankford 2018; Merchant 2011; Tough 2009). A common role is a sound recording technician as identified by the U.S. Bureau of Labor Statistics whose role includes a) operation and application of equipment to record, b) synchronization, mixing, or reproduction of music, voices, or sound effects in movie and video production, c) television production, and d) music production for major and independent labels (U.S. Bureau of Labor Statistics 2020). Unfortunately, there is little research on how each type of the aforementioned formal audio production training prepares students for careers in the audio production industry. Furthermore, the impact of constantly evolving technologies and workflows is not documented.

### Creative Practice in Audio Production Education

Creative practice refers to the intentional practice of creating by learning, mastering, and using the skills (i.e., craft, technical, artistic, intellectual, and creative) that are required for making creative work (Burton 2009). Creative practice encompasses the act of making art as well as incubation of thoughts and ideas. The creative process includes five major phases as shown in Figure 1. Each phase in creative practice has several substeps and is essential for the overall success of the creative process (Smith 2009).

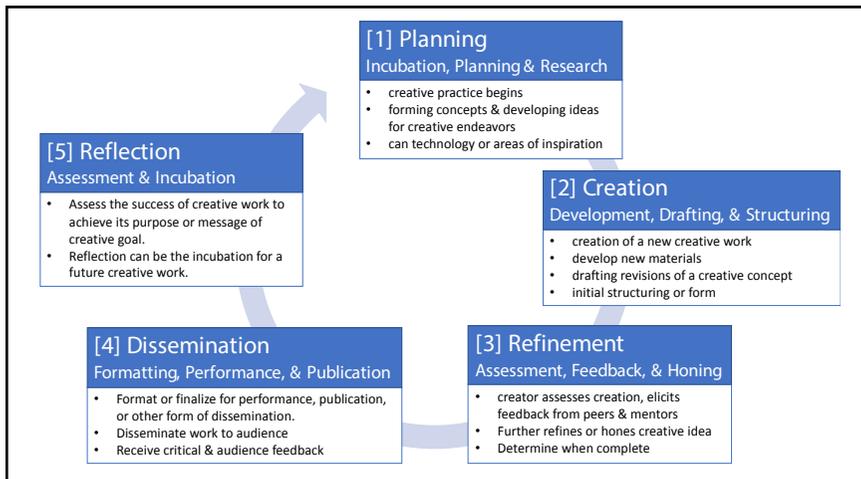


Figure 1. Five phases and sub-steps of the creative process (Smith 2009).

The creative process is commonly integrated into courses in the humanities and social sciences as compared to education and engineering. However, understanding and engaging with the creative process helps students as they undertake creative activities within a discipline (Comunian 2015). Students typically consider courses in the field of arts, humanities, and social science more impactful than courses in education and engineering and describe these courses as highly influential in the development of their own creative process (Daly 2016).

The development of an interdisciplinary application and formation of a repertoire of creative works, or portfolio, that benefits from refinement and revisions based on feedback from mentors and peers are the practical outcomes of engaging in creative practice (Kelly 2016). Open-ended projects, practice on exercises, and instructor feedback are common elements of creative practice and are closely related to the practices of self-directed and problem-based learning, experiential learning, and use of recursive feedback (Merchant 2011; Hiemstra 1994; Hmelo-Silver 2004; Kolb 2014). Therefore, the integration of the creative process within the education and engineering fields can assist in the development of creativity in students.

Infusing the creative process in the classroom via an audio production project can help to engage students already involved in the creative process (Merchant 2011). The creative process benefits students by developing skills such as critical thinking, troubleshooting, and working under the authority of a mentor. The development of these skills was indicated by employers, educators, and students, as highly desirable skills for sound recording technicians working in the audio production industry (Bielmeier 2013a; Bielmeier 2013b; Tough 2009). Infusing the creative process into a traditional recording project requires some restructuring of project learning objectives at the classroom level and requires a process-based assessment.

### **Basic Creative Recording Project**

To engage students of audio production programs, a basic creative recording project (BCRP) is proposed which requires students to work in small production teams to complete a final mix for a single song or composition. Tasks will include songwriting/composing, demo recording, full tracking session, additional orchestration and arrangement, and multiple mix revisions. Production teams will consist of composers, arrangers, pro-

ducers (i.e., advanced students), and tracking engineers. Production teams will need to identify an artist to record who can be a composer or artist from within the group. Production team members are required to conduct several recording sessions and should be available during project benchmark meetings. The BCRP will enable students to complete one cycle of the creative process with a creative outcome defined by the production team.

The BCRP’s learning objectives are:

- a. Complete an audio production and engineering project,
- b. Apply technical skills in project completion,
- c. Identify and meet important benchmarks and deadlines,
- d. Communicate effectively with artists, musicians, and team members,
- e. Address and interpret feedback,
- f. Publish the final production for dissemination and feedback, and
- g. Apply skills for creative practice.

These goals reflect the important aspects of a successful recording production and creative process. Students will be required to engage technically and creatively to complete the project.

In the BCRP, having specific project phases is important for the coordination and assessment of project progress. For each project phase, Table 2 shows the meetings, presentations, recording tasks, and creative practice phases.

<b>BCRP Phase</b>	<b>Presentation</b>	<b>Recording Task</b>	<b>Creative Practice Phase</b>
Preplanning	Artist Review	None	1
Preproduction	Demo Review	Demo Session	1 & 2
Recording	Tracking Review	Tracking Session	2
Postproduction	Mix Review	Initial and Revised Mixes	3
	None	Final Redbook Pre-Master	3
Distribution	None	File, Meta Data, Art Upload	4 & 5

Table 2. Course project summary, deliverables, recording tasks, and remote recording modalities.

During the Preplanning phase, production teams will conduct a group meeting and create a brief presentation of their proposed artist. This presentation, the Artist Review, will contain a) biographical and contact information of the artist, b) musical samples/examples of the artist from current or previous work, and c) an outline of goals for the rest of the project. This first phase requires students to use the first phase of creative practice by incubating an idea, planning, and research. Note, this creative phase may be completed prior to the course project by a group member who has already created an idea.

The Artist Review will be presented during a class meeting that will enable the coordination of all production teams, including producers and engineers, as well as artists, musicians, and additional stakeholders. Also, the production meeting requires production groups to confirm their artist and production approach and receive feedback from the professor and peers to further refine their approach and project goals. After the presentation, clarifying questions can be asked and answered to assist in further refining the project plan. Production teams will receive feedback from the professor and peers, and the feedback will be documented.

During the Preproduction phase, production teams will conduct a demo session and create a Demo Review presentation. The demo session will consist of vocals and at least one instrument, or at the bare minimum a recording that documents the form, lyrics, and foundational material of the proposed song or composition. This phase requires students to use Phase 1 and 2 of creative practice: the initial song or composition will be created by a group member.

The Demo Review Presentation will occur during a class meeting that allows students to present their demo session and receive feedback. The presentation will include a) all session documentation, b) the DAW session files, and c) goals for the tracking session including additional instruments and recording production. Production teams will receive feedback from the professor and peers, and will be documented. This feedback will focus less on the technical aspects of recording a demo and focus rather on the song and the creative process.

During the Recording phase, production teams will conduct several tracking sessions in which all musical elements of the project will be recorded: percussion, bass, harmony components, and lead and backup vocals. The Tracking Review will be presented during a class meeting that allows students to present a tracking session and receive feedback.

The presentation will include a) all session documentation, b) DAW session files, c) goals for additional tracking, and d) feedback from artist, classmates, and professor on additional tracking production needed before mixing can commence. Production teams will receive feedback from the professor and peers, and will be documented. This feedback will focus on the technical aspects of the recording process including mic choice and placement, evaluation of performance, consideration for additional instruments, and arrangement components.

During the Postproduction phase, production teams will create an initial mix of their project including several revisions based on feedback from the professor and peers. This phase will allow students to work in the fourth phase of creative practice as they may be required to create additional instrument parts or add to the musical arrangement. The Mix Review presentation will occur during a class meeting where production teams will present the initial mix of their artist. The presentation will include a) all session documentation, b) DAW session files, c) goals for additional mixing, and d) feedback from artist, classmates, and professor on changes to be made on the mix. Furthermore, conducting several of these mix review sessions during class meetings is highly suggested as often developing engineers will need several drafts and revisions to meet client and course goals. The Listening Party will occur during a class meeting where each production team's final Redbook pre-master will be played allowing artists, classmates, and professor to provide any final feedback or summative reflections. Also, an optional phase to the BCRP is to include basic finalizing or mastering benchmarks to prepare the mixes for digital release.

During the Distribution phase, production teams will digitally distribute the final production for dissemination and outside feedback. Figure 2 shows an example of a digital release of a similar project.

There are several music distribution services that will allow for the upload, metadata creation (including ISRC codes), and distribution of the final output of each production team. In fact, some music distribution services offer free licensing, royalty collection, and dissemination on the major music streaming applications and services. Often music distribution services allow for uploaders to create an institutional or "Label Account," which allows for the upload of multiple compilation albums. Depending on time and experience of students, the professor or facilitator may conduct uploading and formatting. This final distribution is important for

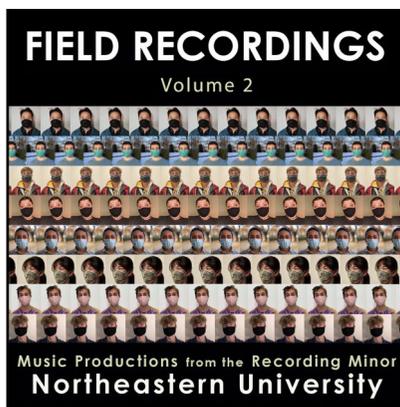


Figure 2. Northeastern University's Recording Minor release *Field Recordings Volume 2* (2020).

Phases 4 and 5 of the creative process which requires students to engage in dissemination and reflection.

### Process-Based Assessment

Process-based assessment borrows from the cognitive apprenticeship model, which suggests that future engineers need strong procedural knowledge of technology (Hiemstra 1994). This strong foundation in audio practice and production is especially needed in the audio for game industry because employees are typically from disparate audio backgrounds and specializations (Hmelo-Silver 2004; Sarisky 2011). Furthermore, research shows that some educators feel a multidisciplinary approach to audio education helps students obtain an understanding of their own workflow and how it applies to other roles in the creative fields of film and media (Lankford 2018). This process will assist in the development of each student's personal creative process (Kelly 2016, Kolb 2014). Traditional outcome-based projects should be graded via process-based assessment (Hmelo-Silver 2004; Rodgers 2014). For example, grading the output or artistic quality of a novice or basic-level project is not purposeful. Such a project may require students to hook up an audio interface and record via a microphone. Therefore, credit/points should focus on the process, both the technical, creative, and social skills pertinent to the assignment.

In the proposed BCRP, the process-based assessment will quantify the technical and musical outputs of the project and will focus on students' ability to manage, apply, and navigate the creative process. The

use of documentation, recursive feedback loops, and verbal presentation with critique will enable assessment at the completion of each phase. The requirement for session documentation at each phase of the BCRP allows the professor to evaluate the project progress and allows students to reflect on the pre-session planning, organization of musicians, and reservation of resources. Implementation of a recursive feedback loop fosters the ability of students to work under a mentor (Merchant 2011; Bielmeier 2014).

A recursive feedback loop requires students to submit projects and course work, receive feedback from instructors, and then make alterations in response. Potentially, students could rework a specific project several times until they have reconciled all feedback to the professor's satisfaction. This recursive feedback loop integrates one-on-one or mentor/mentee opportunities within the classroom and hones a student's ability to communicate with clients and coworkers and to respond to feedback (Merchant 2011; Bielmeier 2014). During this feedback process, it is important for the professor to determine both the number of iterations and appropriate grading scheme to create incentive and meaning for each feedback round.

Within the BCRP, each recording task requires a draft submission followed by a final submission. The rubrics for both the draft and final submission include categories for pre-planning, creative outcomes, and documentation. However, the draft rubric focuses on the collection of feedback, whereas the final rubric focuses on the application of the collected feedback. Table 3 shows the Tracking Draft Grading Rubric which details the actions that should be taken by each member of the production team. This is a group assignment and therefore students are not graded individually but rather receive a grade based on their team's ability to complete the required objectives outlined in the rubric. The team approach reflects the modern audio production workflow and allows students who have previous experience with a specific skill to mentor peers on that skill.

Teams of students are required to obtain feedback, suggestions, and client input via synchronous class events and asynchronous course discussion boards. The Tracking Final Grading Rubric is shown in Table 4 and requires students to make revisions based on feedback. Therefore, documenting feedback is important in project assessment as well as achieving musical outcomes.

Often in listening sessions or production meetings there is a focus on the outcome, or what the client, producer, or label is hearing. This requires an engineer to reflect on how the production techniques and processes

Grading Criteria	Ratings			Score
	Excel (5 points) Complete	Satisfactory (2.5 points) Missing Elements	Novice (0 points) Incomplete	
Pre-plan	Coordinates with musician and creates a pre-plan	Failure to either record musician or coordinate with musician and create a pre-plan	Fails to complete category	
Session	Recording of all instruments/components for final production	Struggles to perform recording of required instruments and components for final production	Fails to complete category	
Documentation/ Turn-ins	Includes all session doc on Canvas and uploads to folder in RCP cloud storage. Student uploads entire Pro Tools session and all session doc to cloud storage and shares link via Canvas	Fails to include all session doc on Canvas and uploads to folder in RCP cloud storage. Or fails to upload entire Pro Tools session and all session doc to cloud storage and shares link via Canvas	Fails to complete category	
Discussion	Shares link to Redbook bounce of demo and includes a) all session doc, b) Pro Tools session, c) goals for add tracking, d) elicits feedback from artist, classmates, and professor on add tracking	Missing components when sharing Redbook bounce of demo or a) all session doc, b) Pro Tools session, c) goals for add tracking, d) elicits feedback from artist, classmate, and professor on add tracking	Fails to complete category	
Total Score (20 Points)				

Table 3. Example of a Grading Rubric for Tracking Draft.

used are affecting these musical outcomes. In a process-based assessment, reflection on tools used to obtain a musical outcome is evaluated.

In the BCRP, verbal presentations allow students to review and reflect on each completed recording and creative task. When students are presenting a specific task, they are reflecting and summarizing not only the musical or artistic outcomes, but are also detailing their process. Refining this process, based on client (and in this case professor and peer) feedback is deemed essential by employers in the industry (Bielmeier 2013a; Bielmeier 2013b) and will enable students to refine their creative process.

Grading Criteria	Ratings			Score
	Excel (5 points) Complete	Satisfactory (2.5 points) Missing Elements	Novice (0 points) Incomplete	
Pre-plan	Coordinates with musician and creates a pre-plan	Fails to coordinate with musician and create pre-plan	Fails to complete category	
Session	Recording of all instruments/components for final production	Struggles to perform recording of required instruments and components for final production	Fails to complete category	
Documentation/ Turn-ins	Includes all <i>updated</i> session doc on Canvas and uploads to folder in RCP cloud storage. Student uploads entire Pro Tools session and all session doc to cloud storage and shares link via Canvas	Fails to include all <i>updated</i> session doc on Canvas and uploads to folder in RCP cloud storage. Or fails to upload entire Pro Tools session and all session doc to cloud storage and shares link via Canvas	Fails to complete category	
Feedback	Based on in-class feedback and feedback provided on Canvas Discussion Board, changes to original recording	Not applicable	Fails to complete category	
Total Score (20 Points)				

Table 4. Example of a Grading Rubric for Tracking Final.

## Conclusion

As stated earlier, a tonmeister is an audio recording professional who is trained in music, acoustics, physics, and mechanics, and can control and improve the sonority of recordings, radio broadcasts, and sound films. The original intent of this designation was to identify audio professionals trained to assist in audio recording. However, contemporary audio professionals and students could benefit by removing the schism between creative practice (e.g., composers) and technical roles (e.g., audio engineering). With the democratization of technology, contemporary audio professionals and students are increasingly seeking ways to combine music creation and editing to meet modern audio production workflows.

This paper provided a review of best practices for linking creative practice within a commercial audio production education classroom. The paper identified the ambiguity when defining contemporary audio produc-

tion programs and detailed students' desires to matriculate in formal audio production training to prepare themselves for a career and roles in the contemporary audio production industry. In addition, the paper described five phases of creative practice and its use and efficacy in higher education for the development of skills such as critical thinking, troubleshooting, and the ability to work under the authority of a mentor. The development of these skills was indicated by employers, educators, and students as highly desirable skills for sound recording technicians working in the audio production industry (Bielmeier 2013b; Bielmeier 2013a; Tough 2009).

A Basic Creative Recording Project (BCRP) was described that balances technical learning objectives while incorporating the acquisition of creative practice skills. The BCRP project schedule was detailed with examples for meetings and assignment turn-ins. A process-based assessment was described and included detailed session documentation, recursive feedback loops, and verbal presentations. Two grading rubrics were presented for execution of a process-based assessment of the BCRP in the classroom.

More research into creative practice and its infusion into audio production programs is needed. Infusing the creative process within an audio production project can help to engage students already involved in the creative process.

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# **Riding the Solar Wind: AM Radio, the Skywave Effect, and the Mainstreaming of Rock & Roll**

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## **Abstract**

The birth of rock & roll is a topic with a rich history of scholarship rooted primarily in the liberal arts. However, one relatively unexplored aspect is the impact of long-distance radio transmission on its movement into the mainstream of popular culture. A geoscientific perspective reveals how this phenomenon, known as the skywave effect, is associated with AM as opposed to FM transmission, favoring nocturnal broadcasts in particular. This technical point of view informs existing discourses regarding cultural appropriation and the rise of the independent record labels. We invite a reading of the serendipitous broadcast of songs, voices, and recordings arising from marginalized communities as a gesture of liberation. The skywave effect reveals disruption of ideological and economical status quo as well as the propagation of late 1940s rhythm and blues music spreading over the following decades into new forms including Caribbean ska and early rock & roll.

Keywords: skywave effect, rock & roll, radio history, AM radio, music business, race records, ionosphere, twentieth century popular culture

## **Introduction**

There is no shortage of critical accounts of the birth and early years of rock & roll. As a result, the particular issue of how this music genre moved from the margins to the center of popular culture has been addressed from multiple viewpoints. Generally speaking, these tend to fall into two broad disciplinary groups: one that follows a social-scientific orientation and another that could be described as more arts oriented comprising the liberal arts with an emphasis on the social sciences, arts as well as studies rooted in philosophy, and religion.<sup>1</sup> The current study aims to complement the

existing corpus by virtue of arguments based in the natural and earth sciences. We will consider concepts from atmospheric science and, to a lesser degree, astronomy, physics, and chemistry not for their own sake but in order to provide a new perspective and therefore greater appreciation for the development of rock & roll in the 1940s and 1950s.

As we would expect from the preceding look at how authors have approached this issue, the story of rock & roll's blossoming has many chapters, metaphorically speaking. Reading across disciplines provides the opportunity to recognize the contingent nature of events leading to—or at least supporting the success of a given artist, song, festival, or recording, etc. For example, the success of the Beatles is a monolithic achievement in the story of rock & roll evinced by the fact that artists, executives, and music writers continue to use it as a measuring stick to estimate the success of contemporary acts now over half a century later. While such comparisons make for eye-catching blurbs, they beg the question of false equivalency by overlooking vast differences in the cultural context of the 1960s as compared to the 2020s. Perhaps the most glaring example of this is the Beatles' iconic February 1964 Ed Sullivan premier on U.S. television. It is difficult to understand how powerful the Sullivan performance was as a gateway to U.S. consumer awareness without the pertinent fact that the entire U.S. television marketplace (over 90 percent of households in 1964) was split between only three networks. This stands in stark contrast to our current television environment in which streaming and cable outlets account for thousands of channel options while shedding a great deal of light on the question of the group's instant visibility.

This coincidence of circumstance (the fact of the Beatles' initial entry into the U.S. along with the fact of television's relative lack of programming choices at the time) are two mutually supportive factors, two elements among others in the "perfect storm" that coalesced into the phenomenon we have come to know as Beatlemania. This is one example of how historical understanding acquires greater depth by interdisciplinary perspective. In this example, the history of popular music benefits from the contribution of broadcast data typically archived under the separate discipline of mass communication. The purpose of this example is to show, by analogy, the stakes of the work at hand. Rather than looking at the rise of the Beatles in the 1960s, we will instead consider the movement of rock & roll into mainstream awareness in the 1950s. The intent of this paper is to enrich our understanding of this issue by gazing through the lens of how

radio technology interacts with geophysical phenomenon to create the possibility for very long-range broadcasts. Because of the content of these early rock & roll broadcasts, the unexpected fact of their long-distance propagation acted to disrupt social norms including segregationist efforts intended to prohibit intermingling of black and white cultures.

Questions intended to guide the current study include: what particular circumstances came together on the side of broadcast *technology* during the mid-century period? What particular circumstances came together on the side of broadcast *management* during the mid-century period? And, how did the confrontation of socio-political and scientific forces result in unanticipated benefits for the mainstreaming of a marginalized musical genre? Responding to these questions will involve research into the nature and transition from AM to FM broadcasting as well as the confrontation of scientific phenomena like the “skywave effect” that made AM broadcast behave erratically. We will consider the federal regulations this phenomenon incurred and reflect on the role of radio relative to new genres and marginalized communities. In order to prepare a context for understanding the interrelation of these issues, let us consider a selection of literature addressing how the mid-century U.S. music industry was impacted by the dynamic issues of race and the division between mainstream and marginal music forms. Additionally, scientific considerations regarding radio technology and the commercial debut of FM radio in the 1940s will prove beneficial. Following an introduction to these broader issues, we will look at the intersection of early radio technology and geophysical properties that resulted in what has been dubbed the skywave effect before a concluding discussion relating the two narratives.

### Mainstreaming Race Music, Circa 1950

As Wayne Cottrell shows, the contours of the popular music mainstream in the decades leading up to the 1950s were largely determined by crooners, female vocalists, jazz and swing bands, and celebrity personalities.<sup>2</sup> A sample of top artists from 1930 to 1949 yields names like Louis Armstrong, Count Basie, Cab Calloway, Nat King Cole, Bing Crosby, Eddie Duchin, Duke Ellington, Benny Goodman, Bob Haggart, Billie Holiday, the Ink Spots, Sammy Kaye, Jimmie Lunceford, Vera Lynn, Glenn Miller, the Mills Brothers, Vaughn Monroe, Dinah Shore, Frank Sinatra, and Bob Wills. Although ensembles of this period tend to adhere to a rather clear divide between all-white or all-black bands, the 1930s and 40s are

important harbingers of changes to come. White bandleader Benny Goodman's hiring of black guitarist Charlie Christian or Artie Shaw's brief collaboration with Billie Holiday were notable breakdowns of the racial divide among the musician class. On the corporate level as well, the color of money appears to have trumped that of the flesh to a certain degree. Out of the list of artists above, each one was signed to a major label or to a major-owned subsidiary despite the fact that the list is split nearly 50-50 between white artists and those of color.<sup>3</sup> Furthermore, there is no appreciable pattern in the list to support the idea that subsidiaries are reserved for minority artists despite the fact that several scholars have observed that pattern during the 1920s.<sup>4</sup>

The appearance of a movement toward equitable racial representation suggested by this sample population of leading artists from the 1930s and '40s is however not indicative of the situation as it would play out in the 1950s. Instead, as authors like Geoffrey Hull have shown, there is a widening divide between the smaller upstart labels associated with the black originators of what would become rock & roll and the white-owned majors who would ultimately integrate this new sound into the mainstream. This is particularly evident in the way that the ownership of the mainstream popular music market would shift over the course of the 1950s. According to Hull, that decade in particular shows a complete reversal of fortune with respect to how quickly independent labels engaged rock & roll and how the majors were late to respond. At the start of the 1950s, the major labels maintained control of approximately 75 percent of the mainstream popular music market.<sup>5</sup> As the decade progressed, the majors essentially passed on this new rambunctious sound and decided to stick to the Crosby and Sinatra styles that were in favor at the onset of the swing era. More nimble and less averse to risk, it was the independent labels that gambled and won big on what would become rock & roll as it arose out of marginalized and often poorer communities. By the end of the decade, it was the independent labels that were in control of 75 percent of the popular music marketplace leaving the majors with only 25 percent.

The strategies of how rock & roll was brought into the mainstream is a topic that has been covered by a handful of authors.<sup>6</sup> Their work cumulatively underlines cover songs, the creation of the youth market, and the crowning of Elvis as the "king" of rock & roll as the techniques responsible for "correcting the ship" and bringing the major labels back to a position of dominance. Despite the prominent role of economics as a

driving factor, the situation is a little more complex than just profits. Beneath these issues lurks the attendant phobia of miscegenation. Music is particularly provocative of this fear of the intermixture of different races for obvious reasons including the opportunity it provides for relaxed social codes, comingling, and ultimately the fact that dancing is easily taken as stand-in or rehearsal for sexual contact. As authors like Glenn Altschuler and Randall Stephens have shown, the pairing of political ideologies and religious rhetoric in an environment of longstanding racial intolerance created a highly charged atmosphere of fear in areas like the southeastern United States, also known as the Bible Belt.<sup>7</sup> White hegemony supported a consistency of message across institutions like the media, schools, and churches to peddle and reinforce the idea of the demonic black man or that of the overly promiscuous jezebel black female figure as the appropriate foils for white purity.

With this cultural context in mind, let us transition to a more technical discussion to understand how the combination of geoscience and radio technology disrupted segregationist ideologies of the period. In order to guide our inquiry, consider our first research question and the new perspective these issues create. To wit, what particular circumstances came together on the side of radio broadcast *technology* during the mid-century period? How do these developments bring about the skywave effect and how does this phenomenon impact AM broadcast models at the time of rock & roll's initial distribution?

## The Skywave Effect

The skywave effect is a term used to describe the behavior of some radio waves as they encounter upper regions of the atmosphere. At the border between Earth and space, the ionosphere is where the sun's energy (solar ultraviolet (UV) radiation) initially contacts the gasses of our planet's upper atmosphere. These gasses lose electrons and become ionized at various levels depending on altitude and time of day or night. This ionization occurs between roughly thirty and six hundred miles above the Earth's surface. Based on altitude, the various wavelengths of the sun's UV radiation are effectively absorbed by different levels or strata of the ionosphere. Generally speaking, the ionization is more constant and significant at the upper levels, reducing the power of the sun's rays as they move closer to the earth where the atmosphere becomes denser and the ionization is less significant. These differences in the atmosphere result in several levels or

strata within the ionosphere.<sup>8</sup> As radio signals move upward toward the sky, they encounter more ionization and less atmosphere. This dynamic works to progressively bend certain kinds of radio waves until they refract back towards earth mirroring the angle at which they arrived. Tracing this trajectory results in a curved, parabolic shape and signals following that trajectory back to earth are said to exhibit the skywave effect.

Radio waves represent a range of frequencies located at the low energy (i.e., low frequency/high wavelength) end of the electromagnetic spectrum. The range of radio wavelengths go from ultra-low frequency up to wavelengths just below those of the microwave frequency range. For the sake of visualization, radio waves might go from the size of a mountain to those the length of a Coke bottle. As frequency increases and wavelength decreases radio waves are able to avoid or go between the fabric of the ionosphere and are not limited by this semi-porous barrier in any serious way. However, a complicating factor is that there is a correspondence between the various layers of the ionosphere and the radio spectrum. Because ionic density increases with altitude, only higher frequency waves with shorter wavelengths can make their way through the physical gaps found in lower strata before those gaps become too small and these high frequency waves are refracted back towards Earth. As for the lower frequencies, they tend to be absorbed more readily by the greater atmospheric density of the lower levels of the ionosphere through which they spend more time as their lower and longer parabolic trajectory shows. This atmospheric friction results in an inefficient and noisy transmission.

What science shows us then is that there is a sort of goldilocks spectrum of wavelengths perfectly suited for this long-distance transmission via ionospheric refraction known as the skywave effect. Longer wavelengths (below 3 megacycles) lose too much energy due to absorption in the lower atmosphere while very high frequencies (above 30 megacycles) have wavelengths short enough that they pass through the gaps between ions and kite off into space. What we are left with then is the “high frequency” band (roughly between 3 and 30 MHz) of radio waves that will not be unduly weakened by atmospheric friction yet will nonetheless be refracted back to earth due to the influence of the ionosphere. From a theoretical point of view at least, the skywave effect presents a workable concept for unusually long-distance radio wave transmission. In actuality however, this model is subject to potentially confounding variables.

Primary among these would be the Earth's movement relative to the sun since it changes the amount of radiation fed into the Earth's ionizing system, effectively supercharging that portion in direct sunlight. Without digressing too far into the minutia of this additional impact, suffice it to recognize the simple fact of a circadian rhythm between the diurnal (presence of solar radiation) and nocturnal (absence of solar radiation). The alternance between day and night has several important effects for the model we have proposed. As we have noted, the sun charges the ionosphere by splitting off electrons from the gas particles that make up the atmosphere. During the opposing, nighttime phase, the absence of this radiation allows some of the ions to recombine thereby reducing the size of the ionosphere significantly.<sup>9</sup> The rather complex range of ionospheric layers or strata we find in the daytime simplifies into a compact single layer at night. A second dynamic is imparted by the solar wind as it works to push or compress this charged and stratified ionosphere closer to the daytime surface of the earth (see Figure 1). In the conceptual model we have established to this point, the presence of the sun is assumed. This then could be called a "diurnal model" of the ionosphere.

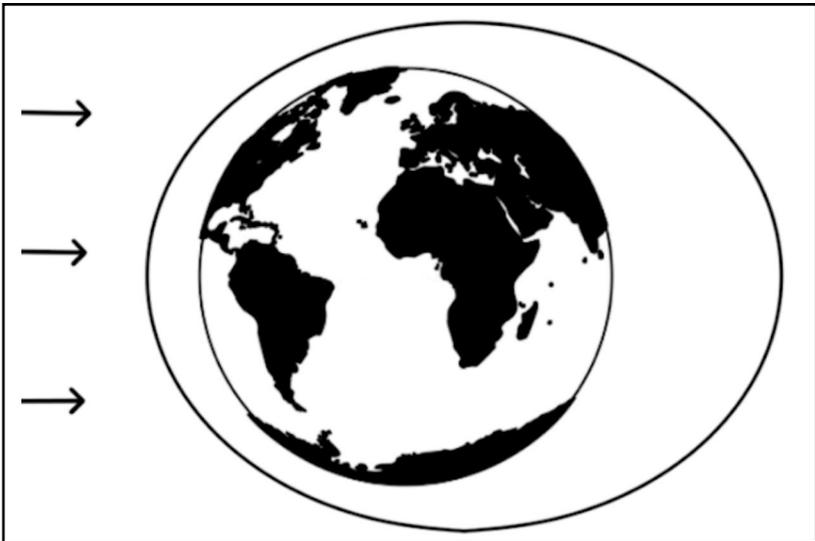


Figure 1. Solar wind (arrows) compresses the Earth's ionosphere during day, elongating it on the dark side of the planet.

At night however, we find a modified model of the ionosphere. During this period, the relative lack of solar radiation reduces the breadth of the ionosphere itself creating a more compact zone. In addition, the solar wind pulls the ionosphere away from the dark side of the Earth making it recede from the planet's surface to a higher altitude. A critical result of this decompression of the ionosphere is that it shifts the way the Earth's nighttime atmosphere interacts with radio frequencies. We will recall that the diurnal model of the ionosphere creates a dynamic in which the high frequency band of radio waves (3-30 MHz) enjoy the skywave effect—that is a long-distance or *refracted* radio wave transmission. The nocturnal model impacts our understanding of long-distance radio transmission in a couple of important ways. As noted above, the ionosphere condenses and its average altitude is increased with the help of the solar wind thus creating a higher “reflective ceiling.” As the ceiling is raised in terms of altitude, the overall distance represented by the parabolic trajectory is therefore increased as well. As the solar wind elongates the “dark side” of the ionosphere, potential radio transmission distances continue to increase. Secondly, the range of usable frequencies for long-distance transmission is effectively *lowered* in favor of the longer wavelengths excluded during daytime transmission. Because the ionosphere is not ionized as strongly at night, the higher frequencies that had been refracted during the day now tend to escape into space. As a general rule of thumb, daytime transmissions present a more efficient model for high frequencies over low and the inverse applies in favor of low frequency nocturnal transmissions.<sup>10</sup>

## AM versus FM

Following the advances of both Guglielmo Marconi and Heinrich Hertz during the closing decades of the nineteenth century, Reginald Fessenden is credited with developing continuous alternating wave transmission technology that led to the first wireless audio transmission via AM radio.<sup>11</sup> Although the technology for wireless audio transmission was in place by approximately 1912, the first World War delayed the technology's commercial debut. Over the first two decades of the twentieth century, various technologies emerged including microphone design and the development of vacuum tubes all supporting the debut of commercial radio in 1920 (cf. KDKA, Pittsburgh, Pennsylvania). Until the advent of FM radio and television in the 1940s, AM radio held a monopoly position over wireless audio broadcast technology. By the 1950s, the Federal Communica-

tion Commission recognized the need to regulate broadcast power. In so doing, it inadvertently led to the creation of at least one very high-power station just outside of the U.S. border that would end up broadcasting very long distances.

Given our theoretical understanding of the interaction between the Earth's ionosphere and radio signals, it is worth recognizing how this applies to the differences between AM and FM transmission. We will recall that wavelength and frequency are crucial concepts here because of the fact that smaller waves squeeze through the charged grid of the ionosphere and larger waves are progressively refracted until they return to Earth. AM transmission uses a fixed frequency as the carrier signal upon which the audio signal is inscribed as a sine wave. As a result of the sine wave's superposition onto the carrier wave, the amplitude of the carrier wave oscillates or "modulates" thus giving us the name Amplitude Modulation and the corresponding acronym, A.M. To translate this into more concrete terms, it is the AM station's carrier frequency that determines the length of a given radio wave that serves as a vehicle for its embedded audio signal. The totality of the AM band is subdivided into 116 intervals between 540 kHz and 1,700 KHz. These frequencies result in radio waves of approximately 500 to 2,000 feet in length.

When it comes to FM, it is the frequency that shifts as opposed to the amplitude of a given transmission. Instead of remaining fixed as a signal carrier, minute changes in the frequency of an FM signal trigger voltages that then operate the speaker causing audio output. Thus, when we tune into 96.2 FM, the actual operating frequencies are slightly above and slightly below 96.2 MHz. Though more complicated, the FM process creates greater fidelity and is more resilient to disturbances such as those found in the lower atmosphere and upper ionosphere, e.g., lightning. Furthermore, we will note that frequency for FM is measured in the megahertz range as opposed to the kilohertz range as found on the AM dial. If 1,000 kilohertz translates to 1 million hertz, then 1 million waves are emitted per second. On the FM dial, 100 megahertz equates to *100 million* waves per second signifying a much smaller wavelength. Indeed, that same 100 MHz frequency on the FM dial refers to a wave that is about 10 feet long as opposed to the 1,000-footlong wave transmitted by 1000 AM. Given that 1,000 kHz and 100 MHz represent the middle of the AM and FM dials respectively, the average AM signal wavelength is significantly longer than its FM counterpart.

Applying these mathematical differences to our conceptual models of the Earth's atmosphere yields some significant results. First and foremost, it is worth recalling that the differences in wavelength are such that the shorter FM radio waves tend to pass unimpeded through the ionosphere while the longer wavelengths associated with AM transmissions do not. This relatively simple observation is a necessary first step in understanding the potentially extreme geographic distances historically associated with AM radio broadcast.<sup>12</sup> Based on our analysis of the diurnal atmospheric model above, we will recall that lower frequencies and longer wavelength signals (AM) are restricted from long-range propagation by a couple of factors. These include the expansion and corresponding dipping of the ionosphere closer to the Earth's surface and the atmospheric interference leading to dissipation of signal strength. This results in daytime broadcast ranges in the U.S. seldom exceeding of two to three hundred miles. During overnight hours however, the situation is reversed, and the long-range transmission of AM radio waves is instead *supported* by the retraction of the ionosphere to higher altitudes. The resulting situation is an increase in broadcast ranges up to one thousand miles overnight in the U.S.<sup>13</sup> Figures 2 and 3 show how the skywave effect impacts diurnal broadcast ranges versus nocturnal ones.



Figure 2. The diurnal skywave effect model shows the impact of the compressed ionosphere (thick solid line) on AM (thin solid line) versus FM (dashed line) signals.

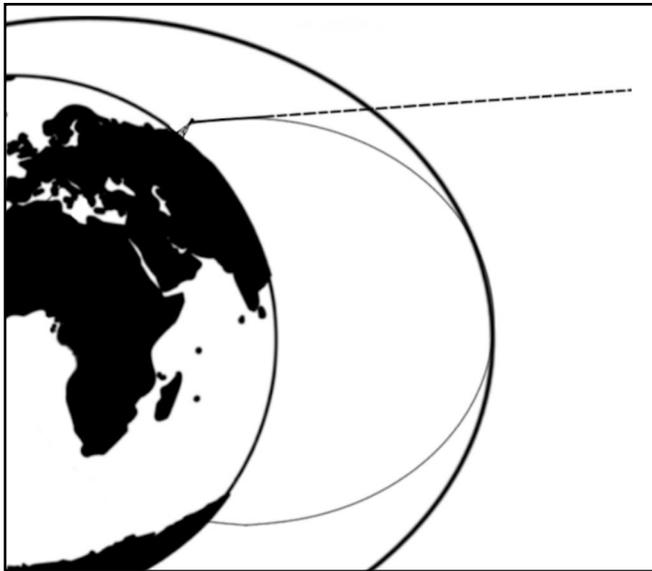


Figure 3. The nocturnal skywave effect model shows the impact of the elongated ionosphere (thick solid line) on AM (thin solid line) versus FM (dashed line) transmissions.

In terms of the commercial radio industry, the long-range propagation of AM signals has led to the need for an interesting body of federal policy to avoid chaos as competition for airwaves picks up at night. Here, the regulatory system allows us to understand how the skywave effect impacts operations on both national and international levels. Recalling that there are 116 possible AM frequencies against the fact of thousands of AM radio stations in North America, the issue of stations on the same frequency with overlapping territories arises. This has practical implications for commercial radio operators. Take for example KMVP AM 1000 in Chicago. Its powerful transmitter has a range of about 250 miles during the day but expands to 1,000 miles at night. This overlaps with two other AM stations broadcasting at 1,000 kHz: WCCD in Parma, Ohio as well as KSOO in Sioux Falls, South Dakota. Because they serve smaller markets, these latter stations are forced to reduce power or to quit broadcasting altogether during the nighttime hours. The Federal Communications Commission (FCC) is authorized to rank stations by market size from largest to smallest (*clear channel, regional, local*) and use these rankings to regulate nighttime AM station reach. In 1938 the FCC considered the U.S. Sen-

ate's Wheeler Resolution that imposed a maximum limit of 50,000 watts on radio transmitter wattage in the United States.<sup>14</sup> The resulting situation is that, as a *regional* station, Sioux Falls' KSOO is required to cut to half power and Parma's *local* WCCD powers down completely overnight. However, as the *clear channel* designee for its area, Chicago's KMVP AM station operates at full power. Thanks to the skywave effect, KMVP covers the entire U.S. east of the continental divide from sunset to sunrise—a nighttime coverage area of about 3.1 million square miles.

The Wheeler resolution however applies to the United States only. The reach of super high-power transmitters, also known as “flamethrowers,” placed just across our border provides an extreme example of long-range AM radio wave propagation. In 1961 the RCA corporation sent technicians to Ciudad Acuña, Mexico to install a transmitter so powerful that it was outlawed in the U.S. whose border lies less than a mile to the northeast. The notorious 250,000-watt transmitter was brought online at XERF 1570 AM the following year with sufficient nocturnal reach for signal reception in Tel Aviv, Israel to the East and Melbourne, Australia to the West (see Figure 3). The voices transmitted from these flamethrowers, and how they would resonate in the areas they covered, will be the focal point of the final sections of this paper. As we transition back to the cultural context provided at the outset, let us return to our final research questions to help refocus on those issues while simultaneously holding the recent technical discussion in mind. To wit, what particular circumstances came together on the side of broadcast *management* during the mid-century period? What messages were conveyed through early rock & roll and how were they received by the various groups in the listening area?

## Voices of the Night

By the year 1950, the swing and blues sounds that had animated the big bands found recourse in the trimmed down five-to-eight piece jump blues band formats as well as via the increasing number of transplant country blues musicians migrating from the south.<sup>15</sup> The intersection of electric amplification with the driving country blues guitar styles along with syncopated boogie-woogie piano and amplified harmonica created musical possibilities that were as infectious in their upbeat rhythms as they were original and new in their sonic energy. This is why the few copies of early rhythm and blues records that made it to western Europe were so precious to bands like the Beatles and the Rolling Stones, whose name echoes

a song title of one such Mississippi-to-Chicago transplant bluesman.<sup>16</sup> According to musicologists and rock critics, Ike Turner's 1951 recording of "Rocket 88" on immigrant-owned Chess Records is the first rock & roll disc.<sup>17</sup> This example supports the fact that during the late 1940s and early 1950s, an increasing amount of minority-owned and operated independent record labels were springing up to capture these new underground sounds. Unlike the major labels that had established protocol for promotion and broad distribution networks, these independents often operated on a comparatively modest budget with limited access to distribution. As a result, the reliance on progressively managed radio stations and younger charismatic disc jockeys to play these records was paramount.

In terms of radio station management and operations, the five-year period between 1948 and 1953 witnessed the leading edge of innovative programming models to serve marginalized communities, initially in urban settings. During this period, AM stations in Los Angeles and Cleveland brought two such charismatic DJs on board who had rapid success with shows featuring black rhythm and blues aimed at black audiences despite the fact that the DJs themselves were white. During this time frame, famed DJs Hunter Hancock in Los Angeles and Alan Freed in Cleveland started with daytime shows before migrating into evening time slots. The affiliated stations (KFVD and KGfJ 1230 AM in Los Angeles and WJW 850 AM in Cleveland) were low powered at between 1,000 and 5,000 watts which served only their respective cities during the day. In the case of Freed's WJW 850 in Cleveland however, the higher wattage and the skywave effect allowed for increased reach of up to 500 miles at night. In the right conditions, Freed's nighttime show might have reached from Cleveland south to Nashville, Tennessee, northwest to Madison, Wisconsin, and east to New York City.

While not the first station to play early rhythm and blues, Nashville's WLAC is nonetheless central to the purposes of this study. Awarded clear channel status in 1942, WLAC maxed out its wattage with a 50,000-watt signal day and night on 1510 kHz on the AM dial. By the end of the 1940s WLAC had hired a pair of DJs in their mid-twenties who were developing a nighttime show for black audiences in its region to enjoy this new genre of upbeat electric blues music. Gene Nobles and his understudy John Richbourg were later joined by Herman Grizzard and Bill "The Hossman" Allen who quickly recognized the appeal and natural fit of playing this countercultural style of music explicitly suited for late night audiences.

Through these shows, the station was branded as “the nighttime station for half the nation” as their signal reach ballooned from about three hundred miles during the day to about one thousand miles at night. WLAC’s reach spanned from Nashville westward to El Paso and Denver, northward to Boston, and southward to the Caribbean.

The strongest commercial radio signal to emanate from North America however would become home to the voice of John Richbourg’s under-study Robert Smith. Better known via his radio persona Wolfman Jack, Smith worked as a DJ at the infamously powerful XERF 1570 AM in Ciudad Acuña, Mexico. Wolfman Jack’s rhythm and blues show ran 9 to 10 p.m. daily from 1962 to 1964. The successful operations model, learned from Richbourg in Nashville, ensured mid-century R&B and rock & roll would become one of North America’s best-known exports for the better part of that decade. From another perspective, the rationale for the Federal Communications Commission’s decision to limit AM transmitter strength becomes evident when one realizes that because of its power, Mexico’s XERF essentially eliminated the frequency of 1570 kHz as an option for smaller stations over about a third of the planet.

The impressive impact of this highly contingent situation is illustrated by the following examples. Gregg Allman, who grew up in Jacksonville, Florida, credited WLAC with turning the Allman Brothers on to “real blues music.”<sup>18</sup> The influence of the innovative sounds and syncopated rhythms reaching from the WLAC towers into the Caribbean also appears in musicological studies of the early development of ska music.<sup>19</sup> In a third example, early rock & roll guitarist Duane Eddy recalls “fond memories” of growing up in upstate New York in the late 1940s listening to nighttime broadcasts from West Virginia’s WWVA and Cincinnati’s WCKY.<sup>20</sup> In the 1950s, Eddy would do package tours with artists like Dion who likewise recalled those signals reaching him in Brooklyn, New York. By that time, Eddy recalls, both artists enjoyed the long-distance AM radio broadcasts that provided much needed company after performances as they drove into the early morning hours on the backroads of 1950s America. Taken together, these examples reveal not only the reach of the skywave effect during the final decades of AM radio’s dominance, but they also underline the impact it had on both youths and musicians not only by virtue of transmitting new and interesting sounds but as a companion of sorts along their nighttime adventures.

## Discussion

What can we make of these voices of the night speaking across sometimes astounding distances, traveling six hundred miles out into space only to be pulled back and received by often very different cultures? What messages are being conveyed, even if we only consider the case of early rhythm and blues music? Who is receiving these messages, and what sense is made? In the case of early rock & roll music we are considering here, we have identified some impacts on the development of musical genre by citing the Allman Brothers and the influence it had on ska. And what of the ostensibly intended audience of urban and rural blacks? This is a clear area for future research since very little exists regarding their reception of these broadcasts. As for mainstream America in the decades leading up to civil rights however, the skywave effect works to disrupt the ideological or hegemonic borders protecting the idea of white purity found in the region of the southeastern United States. From a slightly romanticized point of view, there is a certain poignancy to the idea of DJs giving voice to the oppressed, allowing their art to speak to experiences some more conservative regions deemed unfit for mainstream culture.

Looking back over the variety of perspectives engaged by this study, our scientific and industrial-operations perspectives have been brought to bear upon the socio-cultural narratives surrounding the birth of rock & roll. A new way of seeing the situation, our scientific perspective brings with it a radical objectivity as well as a unique moment to reflect. In so doing, it is hard to avoid the irony of these broadcasts juxtaposed against the historical effort to mute those same voices deemed unfit for public conversation or unworthy of basic civil rights. We might even recognize the image of transistor radio-clutching middle-class teens furtively listening to the “devil’s music” under the sheets when their parents have gone to bed. Poetic justice aside, these voices of the night were nonetheless reaching vast swaths of the Earth’s surface, brought along by pioneering rock & roll DJs—funky pied pipers in their own right—operating a sort of translation by their choices of what to play on the air. With the support of the skywave effect, these broadcasts were truly making legends of paupers and global musical diplomats out of common laborers.

From the perspective of the operations side of the music business, the skywave effect finds its place in the story of the major labels’ loss of control of the popular music market. Prior to the equalizing impact brought about by the internet, “major” label status was not conferred simply as a

matter of larger budgets or rosters. Since the mid-twentieth century, the distinction between major and independent labels has had everything to do with the specific power to distribute and promote recordings. If a given independent label's distribution is local or regional, then major labels of the period managed larger, national and international distribution networks. It has been a long-standing strategy for successful independents to foster growth by entering into contractual distribution agreements with majors who sell access to their larger networks. By the same token, radio promotion has traditionally worked to pull recorded product through the distribution pipeline by creating visibility and generating demand. Together, radio promotion and distribution have been key components that allow major labels to introduce talent to new and distant marketplaces. The skywave effect short circuited this entire process by allowing for the independent records to momentarily achieve broad geographical distribution by way of the performance of their records on AM radio channels during nighttime broadcasts.

The science that allowed for these broadcasts to cross racial, geographical, and socio-demographic lines was not completely immune to the subtending ideological value systems. To the extent that conservative ideologies worked to force those records onto the margins and into the shadows, it also supported the growth of an unintended effect on the part of the younger generations. Perhaps it is not too much of a stretch to recognize the spirit of youthful rebellion so often associated with the rock & roll movement of the 1950s and '60s in relation to curiosity about what the apparent threat might actually be? In this respect, the portable transistor radio is an important technological innovation not simply for listening to music but as a way for listeners to seek answers and assess the gravity of the threat for themselves.

As a relatively inexpensive item of personal property, portable radios further expanded the distribution, reach, and accessibility of what some more conservative segments likely considered as a taboo or outlandish communication. Instead of the 1930s and '40s image of families gathering around the large wooden console and listening intently to the one living room radio, the transistor radio fostered a more individualized relationship with broadcast. Whether by car or by handheld transistor device, portable radios allowed for youth identity to be constructed progressively outside of the home and on the terms set by youngsters themselves. It allowed for its owners to reimagine common sites like campsites, beach parties,

sleepovers, and parking lots as impromptu music venues. Indeed, scenes from movies like *American Graffiti* repeatedly show this iconic convergence of teens parking at a malt shop and socializing around the car radio as emblematic of nightlife of the era. Paired with the skywave effect, the transistor radio allowed for these voices from the shadows to pass momentarily unbound by the various regulatory, industrial, and ideological filters—including those imposed by the major labels themselves—that would have otherwise preempted their transmission in favor of different voices.

By the end of the 1950s, the majors had lost 50 percent of their market share due to multiple factors including their assessment of rock & roll as a passing fad.<sup>21</sup> By using their own (mostly white) artists to re-record R&B records from the late 40s and early 50s, the majors used those covers to encourage the developing teen pop market as mainstream event. They then took necessary steps towards rebranding black rhythm & blues and turning it into something they could control, exploit, and rebrand as rock & roll. Without the physics of the skywave and the voices it carries, it is uncertain how long it would have taken these new sounds to permeate the ideological boundaries sheltering middle class youth from what was seen as a potentially corruptive cultural influence. The highly contingent, even coincidental nature of this brief window in time is underlined by the fact that by the mid 1970s, the reign of AM radio was ending and the migration of mainstream popular music to the FM dial was nearly complete. In other words, the skywave effect could have only impacted the transmission, reception, and evolution American popular music during the very years of the rebranding in question.

The birth of rock & roll is a topic with a rich history of interdisciplinary scholarship. We have imported a technical point of view to critique existing discourses regarding cultural appropriation and the rise of the independent record labels. In this context, the skywave effect invites a reading of the serendipitous broadcast of songs, voices, and recordings arising from marginalized communities as a gesture of liberation. Likewise, it reveals disruption of ideological and economical status quo as well as a new understanding of the propagation of late 1940s rhythm and blues music spreading over the following decades into new forms including Caribbean ska and early rock & roll.

## Endnotes

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1. A selection of recent book-length studies located under this broad disciplinary umbrella include Glenn Altschuler's *All shook up: How Rock 'n' Roll Changed America* (Oxford: Oxford University Press, 2003), Larry Birnbaum, *Before Elvis: The Prehistory of Rock 'n' Roll* (New York: Scarecrow Press, 2012), Michael Campbell, *Popular Music in America: And The Beat Goes On*, 4th ed. (Boston: Cengage Learning, 2011), Nelson George, *The Death of Rhythm and Blues* (New York: Penguin, 2003), Robert G. Pielke, *You Say You Want a Revolution: Rock Music in American Culture* (Chicago: Nelson-Hall, 1986).

An older group of texts focuses on identity politics: Margot Jefferson, "Ripping off black music," *Harper's* (January 1973): 40-45; Eileen Southern, *The Music of Black Americans: A History* (New York: Norton, 1971); Nick Tosches, *Unsung Heroes of Rock 'n' Roll* (London: Secker & Warburg, 1984); Reebee Garofalo, "Black popular music: Crossing over or going under?" in *Rock and Popular Music: Politics, Policies, Institutions* edited by Tony Bennett et al. (New York: Routledge, 1993); Steve Perry, "Ain't No Mountain High Enough: The Politics of Crossover," in *Facing the Music: Essays on Pop Rock and culture*, edited by Simon Frith, 55-87 (New York: Pantheon, 1988) and others speaking from a more business-oriented perspective: *Rock & Roll invaders: The AM Radio DJs* (DVD), produced by Paul Eichgrun and Ross Porter (Carson City: Filmwest Associates, 1998) and Geoffrey P. Hull, *The Recording Industry* (New York: Routledge, 2004).

More markedly interdisciplinary works include those based in religion: Mark Joseph, *Rock Gets Religion: The Battle for the Soul of the Devil's Music* (New York: WND Books, 2018); Shawn Young, *Gray Sabbath: Jesus People USA, the Evangelical Left, and the Evolution of Christian Rock* (New York: Columbia University Press, 2015), or philosophy (James Harris, *Philosophy at 33 1/3 rpm: Themes of Classic Rock Music* (Chicago: Open Court Publishing, 1993).

2. Wayne D. Cottrell, *Top Popular Music of the Early 20th Century: 1900-1949 -- Rankings, Artists & Links* (Crestline, California: Wayne D. Cottrell, 2019).

3. In 1940 the U.S. major labels included: Columbia (Louis Armstrong, Eddie Duchin, Benny Goodman, Jimmie Lunceford), its subsidiaries Vocalion (Billie Holiday) and Okeh (Bob Wills, Cab Calloway); Decca (Count Basie, Nat Cole, Bing Crosby, Bob Haggart, The Ink Spots, Vera Lynn) and its subsidiary Brunswick (The Mills Bros.); RCA (Duke Ellington, Sammy Kaye, Frank Sinatra) and its subsidiary Bluebird (Glenn Miller, Vince Monroe, Dinah Shore).
4. A selection of recent major studies addressing race records include: Al W. Blue, *Race records and the women who made them famous, Vol. 1* (CreateSpace Independent Publishing Platform, 2012); Barry Mazor, *Ralph Peer and the Making of Popular Roots Music* (Chicago: Chicago Review Press, 2015); Brian Ward and Patrick Huber, *A&R Pioneers: Architects of American Roots Music on Record* (Nashville: Vanderbilt University Press - Country Music Foundation Press, 2018).
5. In addition to G. Hull (supra), other authors have shown how independent labels became progressively associated with original black artists while majors became more associated with white “cover” versions in the 1950s. These include Billy Vera and Art Rupe, *Rip It Up: The Specialty Records Story* (Chicago: BMG Books, 2019); Randy Fox, *Shake Your Hips: The Excello Records Story* (Chicago: BMG Books, 2018) and Nadine Cohodas, *Spinning Blues Into Gold: The Chess Brothers and the Legendary Chess Records* (Winipeg: Iconoclastic, 2012).
6. The specific issue of how rock & roll was mainstreamed include: Ed Ward, *The History of Rock & Roll, Part 1* (New York: Flatiron Books, 2017); Rich Cohen, *The Record Men: The Chess Brothers and the Birth of Rock & Roll* (New York: W. W. Norton, 2005); Portia K. Maultsby and Mellonee V. Burnim, eds., *Issues in African American Music: Power, Gender, Race, Representation* (New York: Routledge, 2016) and Nelson George, *The Death of Rhythm and Blues* (London: Penguin, 2003).
7. Recent works from authors who have addressed the threat of black music in the Bible Belt include Glenn Altschuler, *All Shook Up: How Rock ‘n’ Roll Changed America* (New York: Oxford University Press, 2003); Randall J Stephens, *The Devil’s Music: How Christians Inspired, Condemned, and Embraced Rock ‘n’ Roll*

(Cambridge: Harvard University Press, 2018), Michael Bertrand, *Race, Rock, and Elvis* (Urbana: University of Illinois Press, 2000); Paul Friedlander, *Rock and Roll: A Social History* (Boulder: Westview Press, 1996); Piero Scaruffi, *A History of Rock Music* (Lincoln: iUniverse, 2003); David P. Szatmary, *Rockin' in Time: A Social History of Rock-and-Roll* (Upper Saddle River: Prentice Hall, 2004); Samuel A. Floyd, *The Power of Black Music: Interpreting Its History from Africa to the United States* (Oxford: Oxford University Press, 1995). A selection of source texts exemplifying this topic is located in the bibliography.

8. These layers are referred to as D, E, and F running from lowest to highest, (c.f.: Karl Rawer, *Wave Propagation in the Ionosphere* (Dordrecht: Kluwer Academic Publishing, 1993), John S. Seybold, *Introduction to RF Propagation* (Hoboken: John Wiley and Sons, 2005).
9. Some scholars also theorize that the ionosphere tightens up at night to better work as a refracting shield.
10. Other variations apply like seasonal or solar activity. For example during summer nights ionosphere is stronger than winter where wavelengths are longer (20 MHz vs. 10 MHz and below).
11. For more information on Fessenden and the early innovations that standardized radio broadcast technology see Hugh G. J. Aitken, *The Continuous Wave: Technology and American Radio, 1900-1932* (Princeton: Princeton University Press, 1985); Alfred Balk, *The Rise of Radio: From Marconi Through the Golden Age* (McFarland & Company, 2005); Lewis Coe, *Wireless Radio: A History* (Jefferson, North Carolina: McFarland, 1996); Sungook Hong, *Wireless: From Marconi's Black-Box to the Audion* (Ann Arbor, Michigan: MPublishing, 2001); Dennis Karwatka, "Reginald Fessenden and Radio Transmission" in *Tech Directions* 63, no. 8 (March 2004): 12.
12. For additional detail on XERF's nighttime broadcast reach, see Gene Fowler and Bill Crawford, *Border Radio* (Austin: Texas Monthly Press, 1987) and Wolfman Jack and Byron Laursen, *Have Mercy! Confessions of the Original Rock 'n' Roll Animal* (Chicago: Warner Books, 1995).
13. As for FM, the day versus night issue is moot because its high frequency signals are immune to ionospheric interference.

14. Named in honor of Burton K. Wheeler, the senator from Montana who proposed the resolution, U.S. Senate Resolution 234 passed in 1938 limiting U.S. domestic radio station output power. It has been known as the Wheeler Resolution after it was adopted by the FCC the following year.
15. In 1942, Aaron “T-Bone” Walker recorded “I Got A Break Baby” for the Capitol label. Portending the coalescence of contingent forces, it is the first record featuring what would become known as a modern rock & roll ensemble of drums, bass, keyboard and a lead singer who doubles as lead guitar/featured soloist.
16. McKinley Morganfield (1915-1981), a.k.a. Muddy Waters composed “Rolling Stone.”
17. For discussion on Ike Turner’s “Rocket 88” as first rock & roll record, see: Larry Birnbaum, *Before Elvis: The Prehistory of Rock ‘n’ Roll* (Lanham, MD: Scarecrow Press 2003), 17; John Collis, *Ike Turner – King of Rhythm* (London: The Do Not Press, 2003), 75; Jim Dawson and Steve Propes, *What Was the First Rock ‘n’ Roll Record?* (London: Faber & Faber, 1992); Peter Guralnick, *Last Train To Memphis: The Rise of Elvis Presley* (Boston: Little Brown 1994), 38; Robert Palmer, *Deep Blues* (London: Penguin Books, 1982).
18. For the full Gregg Allman quote, see his interview with Dennis Elsas, “Gregg Allman Shares a Fillmore East Secret” 2011 Interview with Gregg Allman, <https://bestclassicbands.com/gregg-allman-interview-dennis-elsas-3-2-16/>, retrieved Jan 7, 2020.
19. Paul Kauppila, “From Memphis to Kingston: An investigation into the origin of Jamaican Ska.” *Social and Economic Studies* 55, no. 1/2 (Mar/June 2006): 78.
20. Duane Eddy, interview by Paul Linden, Nashville, Tennessee, October 4, 2021.
21. Hull, *The Recording Industry*, 58.

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King, Jerry McCain, Nick Moss, Susan Tedeschi, and Kim Wilson. His research interests include interdisciplinary and theoretical approaches to music industry studies. A selection of publications includes "Entrepreneurship: Theory and application in a university arts management setting," "Translating race and genre in popular music" and "Malcolm Chisholm: An Evaluation of Traditional Audio Engineering." Dr. Linden's research has been cited in the recent authoritative history of Fender amplifiers, *The Soul of Tone: 60 Years of Fender Amps* (Hal Leonard, 2007) and *Vintage Guitar Magazine*. He is also a regular contributor to magazines like the *Tone Quest Report* and the French-based magazine, *Blues & Co.*



# **Indie Folk and Americana Triggers: An Analysis of Streaming Music, Audience Behavior, and Global Opportunity**

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## **Abstract**

This paper is a study of eleven indie folk and Americana artists from a database of 2,501 tagged artists in Chartmetric, the music industry's leading data analytics platform. The study assesses music streaming, geographic location of fans, and opportunities to grow audiences in the global music marketplace. The findings will assist artists to assess the music streaming landscape and explore prospects to grow audiences. Educators will be able to utilize this research as a model in the classroom to teach data analytics and marketing strategy.

Keywords: trigger cities, indie folk, Spotify, data analytics, global music marketplace, Chartmetric

## **Introduction**

In 2018, Chartmetric published a study by Chaz Jenkins outlining “trigger cities” in Southeast Asia and Latin America that play a role in engaging consumers on music streaming platforms YouTube and Spotify. Chartmetric's study included forty pop, R&B, electronic, and hip-hop artists and identified ten trigger cities (Mexico City, Lima, Bogota, Santiago, Jakarta, Bangkok, Guayaquil, Istanbul, São Paulo, and Ankara) responsible for driving streaming music activity. Due to socioeconomic status and lower subscription rates, these cities are not large contributors to

global streaming revenues. However, Spotify has developed sophisticated machine learning algorithms to deliver personalized content to its users and according to Chartmetric, “Algorithms drive streaming plays and the amount of streaming activity coming from “trigger cities” may now hold more power than ever to influence the hits of tomorrow by pressing play on them today” (Joven 2019).

Jenkins’ takeaway was that Latin American and South/Southeast Asian trigger cities tended to engage with new or emerging artists more rapidly, irrespective of an artist’s home market. Substantial engagement in a trigger city would often be followed by rapid engagement in other cities, eventually including the artist’s home market. When reviewing data from artists in this study it was clear that South/Southeast Asian markets are not engaged with indie folk and Americana artists. Perhaps a different set of trigger cities or trigger regions could spark activity on streaming platforms for indie folk artists.

This study begins with an overview of artist presence on Spotify, Apple, and Amazon. We sourced Spotify for artists’ data to assess editorial, algorithmic, and user-generated playlists activity on Spotify. Next, we compared geographic streaming activity on Spotify for the eleven acts versus the 2,501 artists tagged “indie folk” and “Americana” on Chartmetric. Lastly, we ran a 29-day advertising campaign on Facebook and Instagram directed to Spotify to determine trigger markets that could provide an opportunity for global expansion for the artists in the study.

## Overview

This section assesses eleven artists’ performance from Chartmetric’s database of 2,501 artists tagged as “indie folk” and “Americana.” The eleven acts represent three of the six stages of career development (developing, mid-level, and established) as outlined by Tompkins in his *Six Stages of Artist Development* (Tompkins 2019). Tompkins’ methodology for assessing the stage of career includes data from live performances, social media, and streaming. Four of the artists in this study are categorized as developing, four artists are mid-level, and three are established artists in the genre of indie-folk/Americana.

Chartmetric has also developed a system to assess artist performance/stage of career called Cross Platform Performance (CPP). CPP measures an artist’s performance across multiple streaming and social media platforms relative to the performance of all artists tracked by Chart-

metric. CPP calculates artist reach and engagement through views, listens, follows, likes, and streams within Spotify, Apple Music, Amazon Music Unlimited, Pandora, YouTube, Instagram, Facebook, Deezer, TikTok, and Triller (Choi 2021). CPP scores range from as low as 1 to a max score of 100. At the time of the writing of this paper, Justin Bieber is the only act currently scoring a perfect CPP of 100. The eleven artists in this study vary in CPP ranking; developing artists score on average a CPP of 20, the average CPP of mid-level artists is 40, and established artists average a CPP score of 60. A CPP ranking of 84 for artists tagged “indie-folk” is the highest among the 2,501 tagged artists on Chartmetric. In many cases, artists in the 70+ CPP ranking have “crossed-over” into the mainstream by virtue of commercial radio airplay, synchronization/songs placed in film, television, or commercials, and/or inclusion on mainstream “hits”-based streaming playlists like Spotify’s Songs to Sing in the Car (9.8 million followers). See Table 1 for a correlation of Chartmetric’s CPP ranking system with the Tompkins’ career stage rubric.

Tompkins Stage	CPP Rank	Number of Acts	Percentage	Examples of Folk/Americana Artists (based on CPP)
Undiscovered	0-19	779	31%	Farewell Company, Katie Todd
Developing	20-39	752	30%	Will Kimbrough, Rachel Sage
Mid-level	40-59	691	28%	Jenny Owens Young, Oshima Brothers
Established	60-69	208	8%	The Shins, First Aid Kit
Superstar	70+	71	3%	Lumineers, Mumford & Sons
<b>Totals</b>		<b>2,501</b>	<b>100%</b>	

Table 1. Chartmetric’s indie folk and Americana artist CPP ranking, correlated with Tompkins’ career stages (note: the artists listed in the table are not the eleven artists who participated in the study).

### Spotify Versus Apple Music and Amazon Music Unlimited

Spotify is the leading subscription-based digital music streaming provider with a global market share of 35%, Apple Music is second with

19%, and Amazon Music Unlimited has a 15% market share; thus the top three streaming music providers maintain a 69% share of the global streaming music market (Statista Research Department 2021). Data for the eleven artists in this study from Chartmetric and Spotify, Apple, and Amazon “Music for Artists” provide insights into Spotify and its primary competitors Apple Music and Amazon Music Unlimited. The eleven acts have generated a total of 569 million streams on Spotify, Apple Music, and Amazon Music Unlimited. Spotify has an 87% share of all artists’ total streams while Apple (8%) and Amazon (5%) represent the remaining 13% share of streams for the acts in the study (Figure 1).

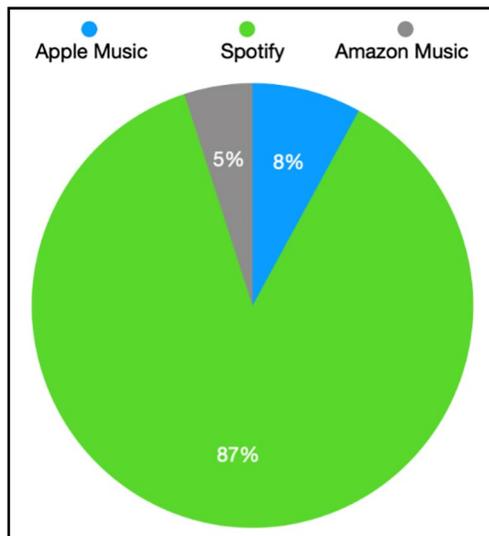


Figure 1. Distribution of the 569 million streams for the eleven artists in the study across Spotify, Apple Music, and Amazon Music Unlimited.

Despite Apple and Amazon’s 34% share of the global streaming audience, Spotify remains the primary means for artists in the study to engage with listeners. The artists’ large presence on Spotify has been boosted by inclusion on playlists. For example, the established artists in the study have been placed on 15,402 playlists on Apple, Amazon, and Spotify; 99% (15,310) of the playlist placements are from Spotify while the remaining 1% (92) of playlists derive from Apple and Amazon (Chartmetric.com). There were 597 playlist placements categorized as editorial playlists (playlists curated by the streaming platform) and 534 of these editorial

playlist placements were on Spotify (89%), 19 on Apple Music, and 44 on Amazon Music Unlimited (11% collectively between Apple and Amazon). When reviewing Chartmetric’s CPP for all eleven artists in the study, we see that CPP is closely aligned with Chartmetric’s Spotify popularity ranking for the eleven artists in the study (Table 2). Spotify is the single most impactful driver of CPP performance for artists in this study (Figure 2).

Artist	CPP Ranking	Spotify Popularity
#1	60	59/100
#2	60	58/100
#3	59	59/100
#4	41	41/100
#5	40	39/100
#6	37	37/100
#7	33	32/100
#8	30	30/100
#9	23	22/100
#10	23	20/100
#11	5	5/100

Table 2. Chartmetric’s Spotify Popularity ranking is the singular most important driver of Chartmetric’s Cross Platform Performance score for the eleven artists in the study.

Chartmetric CPP – Platforms and Metrics		
	Platforms	Metrics
Fan Base	Spotify, Instagram, YouTube, Soundcloud, Deezer, TikTok, Twitter, Pandora, Apple Music, Amazon Music, Facebook, Twitch	Followers, playlists/editorial playlists, subscribers, fans, lifetime stations added, artist track posts
Engagement	Spotify, YouTube, TikTok, Shazam, Twitter, Instagram, radio airplay, Pandora, Apple Music, Amazon Music, Deezer, Wikipedia, Boomplay, Facebook	Streams, monthly listeners, monthly video views, channel views, retweets, likes, page views, talks, playlists/editorial playlists, artist track posts, average likes, comments, and views

Figure 2. CPP (Cross Platform Performance) reflects an artist’s overall performance across multiple platforms relative to the performance of all artists in the music industry (4.5 million in the Chartmetric database).

## Spotify for Artists – Deconstructed

“Spotify for Artists is a dashboard designed by Spotify that allows artists and artist teams to manage an artist profile, access music and audience data, pitch new music to editorial playlist curators, and highlight key songs, concerts, and playlists” (Tunecore, n.d.).

According to Spotify for Artists, the artists in this study have released over 813 songs collectively on Spotify generating 569 million total streams with 210 million streams from editorial playlists, 108 million streams from algorithmic playlists, and 4.2 million streams from user-generated playlists. The artists have amassed a total of 155 million listeners and 447,000 followers on Spotify. Established indie folk artists average one million monthly listeners and 150,000 followers, mid-level acts average 75,000 monthly listeners and 13,000 followers, and developing acts average 13,000 monthly listeners and 2,500 followers. The established artists have a dominant share of the total streams with a 92% share of streams and a 91% share of the listeners in this study.

## Songs Released/Share of Streams

The artists in this study have assembled a vast catalog of songs in their repertoire, releasing 813 songs and averaging 76 songs per artist. Despite the deep catalog of releases, the top five songs (0.6% of releases) account for the majority share of streams on Spotify. The top five songs from each act represent a 63% share of total streams on Spotify and the top ten songs are 70% of total streams. Spotify playlists are driving streaming volume for the artists’ top songs as 57% percent of streams come from playlists.

## Types of Playlists on Spotify

According to Chartmetric’s database there are 3.3 million playlists on Spotify. The three types of playlists on Spotify are editorial playlists, algorithmic playlists, and user-generated playlists.

Editorial playlists are curated by Spotify’s editorial team of music experts and genre specialists from around the world hired by Spotify to curate and manage Spotify playlists (Tools & Resources Staff 2021). Notable Spotify editorial playlists include Today’s Top Hits, Rap Caviar, and Rock This.

Algorithmic playlists are automatically created for users with Spotify’s software algorithms. Spotify monitors music listening habits by each

user and repurposes this information to produce highly personalized playlists (Tools & Resources Staff 2021). Notable Spotify algorithmic playlists include Release Radar, Discover Weekly, and Daily Mix. According to ToneDen, there are 200 million Discover Weekly playlists and 200 million Release Radar playlists created by the algorithms (Pyramind 2020).

Spotify user-generated playlists, also referred to as listener or third-party playlists, are created by Spotify users. These curators can be individuals, artists, record labels, brands, or any user on the platform. These curators can choose to make their playlists “secret” or “public” (Tools & Resources Staff 2021). Notable user-generated playlists include Sony’s Filtr, Indiemono, Starbucks, and Alex Rainbird Music.

The eleven acts average 3.65 streams per listener and 1,272 streams per follower on Spotify (all streams from release date through the date of this study). Algorithmic playlists (Radio, Discover Weekly, Daily Mix, Release Radar) have the highest streams per listener at 3.16 while editorial playlists generate the lowest streams per listener at 2.10. User-generated playlists averaged 2.67 streams per listener (see Table 3). Editorial playlists are often referred to as “lean back” or “drive by” listening experiences as listeners are passive and not inclined to convert into active fans who might follow an artist on social media, attend a show, or purchase merchandise. The lower streams per listener (2.10) for editorial playlists supports this claim. Save rate (when users save songs to their profiles) for editorial playlists are also impacted as the acts averaged a 4 percent lower save rate than their overall average. Despite the “lean back” experience, Spotify editorial playlists have a large following and can assist artists in racking up tens of millions to hundreds of millions of streams.

Algorithmic playlists are more targeted and therefore listeners are likely to engage and develop fans. User-generated playlists were once a means for artists to gain traction on Spotify which would generate algorithmic activation and ultimately lead to editorial playlist inclusion. Recently, user-generated playlists have been fraught with bots and fake streams (Boyer 2020), leading Spotify to disregard these playlists. In January 2021, Spotify removed 750,000 songs from the platform by artists

Source of Streams	Algorithmic	Editorial	Listener
Streams Per Listener	3.16	2.10	2.67

Table 3. Playlist type/source of streams/streams per listener (all streams from release date through the date of this study).

distributed through Distrokid as a result of bots and fake streams (Chill 2021). Subsequently, user-generated playlists are no longer considered a stepping-stone to leverage larger activations on Spotify.

### Artist Discography “This is” Playlists

One key discovery from this study is related to artist discography playlists which are referred as “This Is” playlists on Spotify. An artist discography playlist is a collection of all songs released by an artist from their catalog combined into one playlist. For established and mid-level artists, artist discography playlists are typically curated by Spotify while emerging artists curate their own discography playlists via user-generated playlists. The average stream per listener for artist discography playlists is 26 streams per listener versus the overall average of 3.65 streams per listener for all acts in the study on Spotify. Therefore, unlike that average listener, a listener who visits an artist discography playlist will likely stream that artist an additional twenty-two times.

### Source of Streams

Fifty-seven percent of the streams for all eleven acts were derived from Spotify editorial, algorithmic, and user-Generated playlists. Forty-three percent of the source of streams are non-playlist/organic streams which come directly from the artist’s Spotify profile or listeners’ own personalized playlists.

### Editorial Playlists

Chartmetric’s database lists 98,344 editorial playlists on Spotify. According to Hypebot in 2019, the top followed editorial playlist on Spotify is Today’s Top Hits, currently with 28.6 million followers (Houghton 2020). See Table 4.

Established artists totaled 210 million (37%) editorial streams on Spotify from their 569 million total streams on Spotify. Spotify has 149 editorial playlists tagged as Folk & Acoustic on Chartmetric. The total playlist population/followers for the 149 Folk editorial playlists is 61.2 million (61,198,773) with 37% (55 of 149) of the playlists personalized and 63% (94 of 149) not personalized. The top indie folk, folk pop, and Americana followed playlists on Spotify are Your Favorite Coffeehouse (3.8 million), Acoustic Covers (3.7 million) and Relax & Unwind (3.6 million followers). See Table 5.

Rank	Playlist	Curator	Followers
1	Today's Top Hits	Spotify	28,657,690
2	Top 50 - Global	Spotify Charts	16,148,649
3	RapCaviar	Spotify	13,890,670
4	¡Viva Latino!	Spotify	11,024,409
5	Baila Reggaeton	Spotify	10,256,383
6	Songs to Sing in the Car	Spotify	9,806,681
7	All Out 00s	Spotify	9,415,123
8	Rock Classics	Spotify	9,094,449
9	All Out 80s	Spotify	8,647,752
10	Beast Mode	Spotify	8,087,634

Table 4. Top followed playlists on Spotify as of June 24, 2021 (Chartmetric 2021).

Rank	Editorial Playlist Title	Curator	Followers
1	Your Favorite Coffeehouse	Spotify	3,866,724
2	Acoustic Covers	Spotify	3,703,157
3	Relax & Unwind	Spotify	3,656,172
4	Run Wild	Spotify	2,422,566
5	Afternoon Acoustic	Spotify	2,362,023
6	Classic Acoustic	Spotify	2,249,111
7	90s Acoustic	Spotify	2,152,182
8	Infinite Acoustic	Spotify	2,130,506
9	Happy Folk	Spotify	1,902,812
10	Roots Rising	Spotify	1,822,603

Table 5. The top Folk & Acoustic playlists curated by Spotify on June 24, 2021. These are the playlists that most closely align with the style of music for the artists in this study (Chartmetric 2021).

Editorial playlists are categorized as frontline, catalog, and mixed. Frontline playlists are focused on new music as 75% or more of songs have been released within eighteen months. If 25% or fewer of the songs are released within eighteen months, the playlist is tagged as catalog. If 25% to 75% of the songs on the playlist are new, “release period within eighteen months,” the playlist is referred to as mixed. The top one thou-

sand followed editorial playlists on Spotify have 37.4% classified front-line, 38.4% catalog, and 24.2% mixed (Dredge 2018). The ratio of catalog, frontline, and mixed editorial playlists differs for indie folk, folk pop, and Americana Spotify editorial playlists. From the 143 editorial playlists tagged on Chartmetric in these genres, 68 are catalog (48%), 26 are front-line (18%), and 48 are mixed (34%). Accordingly, established acts with deeper catalogs in this study generate the most significant share of streams from editorial playlists (61%).

The top five performing Spotify editorial playlists for indie folk artists generated 52% of editorial streams for all acts in the study. These playlists are Your Favorite Coffeehouse (YFC), Relax & Unwind (R&U), Country Coffeehouse, Acoustic Covers, and Afternoon Acoustic. The top five Folk & Acoustic editorial playlists total 14.2 million followers averaging 2.8 million followers per playlist. YFC has 3.9 million followers and songs on YFC averaged 8,500 daily streams and 223,000 monthly streams per song. The three songs from artists in the study included on YFC gained over 42 million lifetime streams. R&U has 3.6 million followers and songs placed on R&U averaged 3,400 daily streams and 102,000 monthly streams for the acts in the study. The five songs from artists in the study included on R&U amassed 34 million lifetime streams. Those eight songs placed on YFC and R&U total 76 million streams and encompass 36% of all editorial streams for the eleven artists in this study. Playlist inclusion on YFC or R&U has elevated the artists' profile on Spotify, helping them move to the next stage of development on the platform.

Spotify rates the popularity of each song with a value between 0 and 100. Track popularity is calculated by an algorithm based on the total number of plays the track has amassed over time with 100 as the highest popularity ranking. Spotify editorial curators rely on track popularity to inform their decision to consider songs for playlists. The artists placed on Spotify's most followed playlist, Today's Top Hits, have song popularity scores ranging mainly from 80 to 90 (Figure 3).

According to Chartmetric, the average track popularity for songs on Your Favorite Coffeehouse is 54 (based on an average of 91 titles not including new releases which start with a popularity score of zero) with the most popular song rating of 66. The average track popularity for R&U (see Figure 4) is 55 and the song with the highest popularity rating is 78 (based on the average popularity of 68 tracks not factoring new releases). Artist tracks from this study placed on YMC and R&U range in track popularity

score from 42 to 61. R&U maintains 100 songs on its playlist and YFC has a total of 125 songs on the playlist.

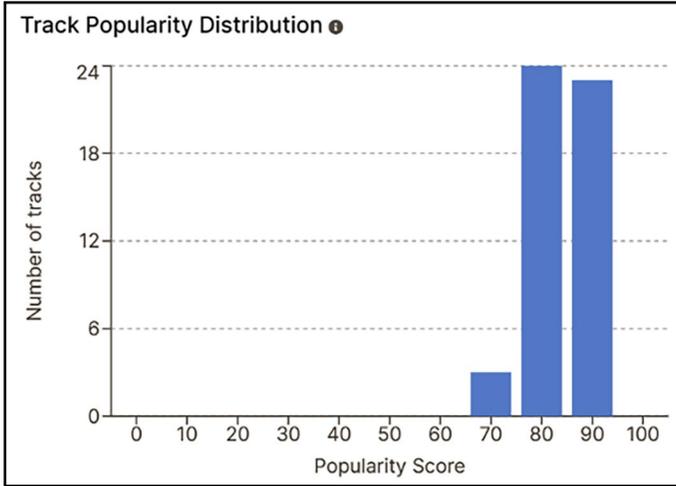


Figure 3. Spotify track popularity for the most followed playlist, Today's Top Hits. The overwhelming majority of songs on the playlist have popularity scores of 80 or higher (Chartmetric 2021).

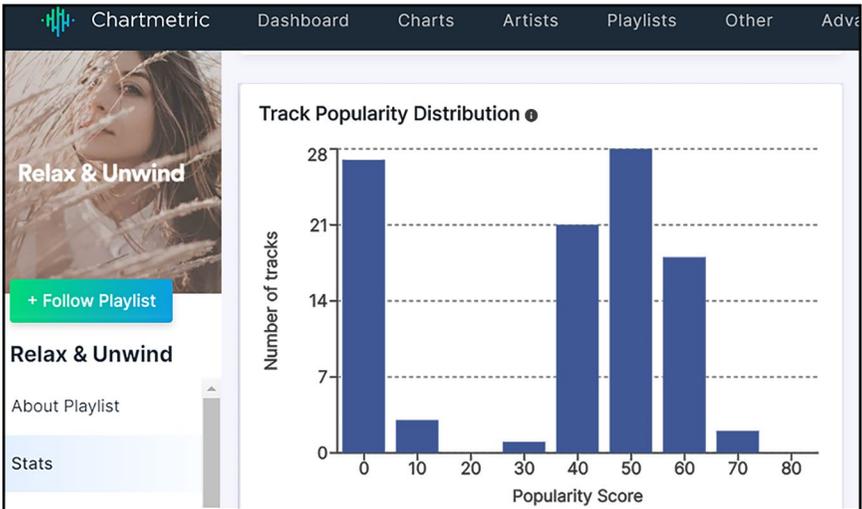


Figure 4. Distribution of Spotify track popularity on the editorial playlist Relax & Unwind (Chartmetric 2021).

Songs on catalog playlists have been released a minimum of six months before inclusion on the playlist. 93% of songs on YFC are at least six months old and 97% of songs on R&U are six or more months old and therefore categorized as catalog playlists. The average number of days songs are included on the YFC playlist is 624 days (approx. 90 weeks). 60% of the artists are U.S. based and only 16% are affiliated with major labels. R&U songs remain on the playlist for an average of 735 days (105 weeks), 41% are U.S. based and 26% are affiliated with major labels (Figure 5). Clearly there is opportunity for independent artists and artists affiliated with independent record labels to be considered for inclusion on Spotify’s top indie folk playlists.

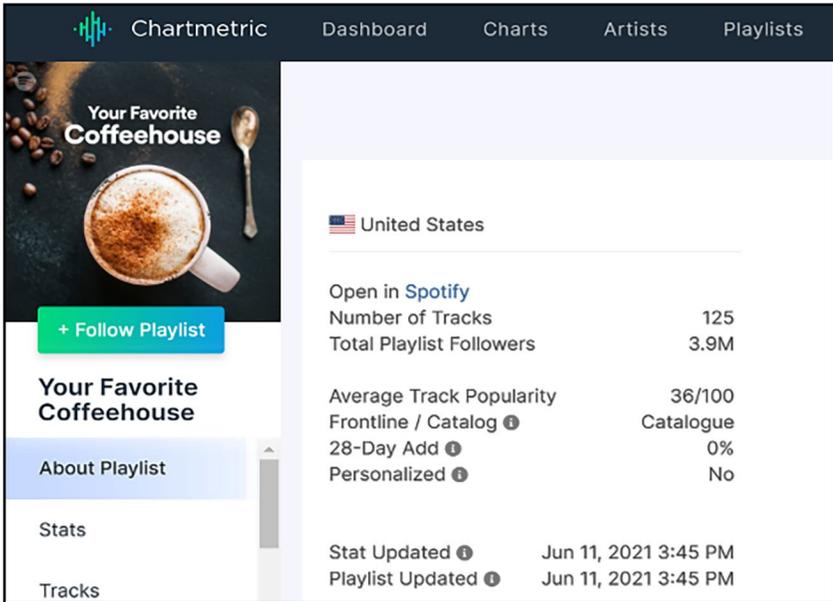


Figure 5. Chartmetric profile and data for the playlist Your Favorite Coffeehouse (Chartmetric 2021).

### Spotify Payouts/Editorial Playlists

Songs on Your Favorite Coffeehouse earned an average of 8,500 daily streams and were maintained for an average of 624 days on the playlist totaling 5.3 million lifetime streams. This activity would pay out approximately US\$21,216 in streaming royalties based on \$.004 per stream (Jacob 2021). The artists in the study have tallied 42 million streams on YFC

which would total a projected payout of \$168,000 from Spotify based on \$.004/stream.

Only a handful of the songs placed on editorial playlists are driving streams for the artists in the study. The top three performing songs for established artists account for a 60% share of editorial streams. Mid-level acts' top two songs account for a 90% share of editorial streams and developing acts' top two songs account for an 85% share of editorial streams. The importance of a hit song appears to be even more vital with niche artists on streaming platforms via editorial placements.

## Playlist Placement and Personalization

The number of songs maintained on a Spotify playlist vary depending on the type of playlist and genre. Algorithmic playlists may have 30 songs (Daily Mix) or 50 songs (Discover Weekly), editorial playlists range from 50 songs (Rock This, Today's Top Hits) to 125 songs (Your Favorite Coffeehouse), and user-generated playlists vary from 30 songs (Emma's Feelings) to 200 (Sad Songs) to as many as 535 (alexrainbirdMusic 2021). Subsequently, the position of song placement on a playlist greatly impacts exposure and streaming activity.

In this study, two established artists' songs were placed on the Spotify editorial playlist Your Favorite Coffeehouse (YFC), which has 3.8 million followers. One song was placed in the first third, track number 14 (out of 125 songs), and the other in the second third, track number 44 on the playlist. The track in the first third of the playlist gained 58% more streams than the song in the second third (9,500 versus 6,000 daily streams). Considering songs on YMC exist for an average of 600 days, a track in the earlier slot would gain an additional 2.1 million streams over the life of the playlist. One of the developing acts' songs placed on the Spotify editorial playlist Folk Pop (731,000 followers) experienced a 50% gain in streams from placement on the second third versus last third position on the playlist (600 vs. 400 daily streams).

Track position and length of time on a playlist is often determined by the playlist type. Frontline playlists (Fresh Folk) typically add 10 to 15 new tracks each week, thereby pushing previous tracks down the order until eventually moving off the playlist. Fresh Folk has 150 songs on the playlist; a song will cycle out of the playlist in 10 to 15 weeks. One of the developing artists in the study had two songs on Fresh Folk, the first song was placed in the top ten and the second song in the middle of the play-

list. The song in the top ten received 43,000 streams and the second song earned 19,100 streams while included on the playlist.

Spotify introduced personalized playlists with the algorithmic playlist “Daily Mix” in 2016 (Perez 2021). Spotify for Artists stated, “Playlists will be personalized based on a listener’s taste which means all music has a better chance of getting into the ears of the right listeners” (Spotify for Artists 2019). Track selection and position are different for each user within personalized playlists. Spotify also stated, “The number of artists on each playlist goes up by 30 percent and the number of tracks goes up by 35 percent” (Kastrenakes 2019). Spotify has expanded personalized playlists to editorial (Songs to Sing in the Car), algorithmic (Release Radar and Discover Weekly), and a custom hub “Made for You” including “Your Genre Mixes,” “Your Artist Mixes,” and “Your Decade Mixes.” In June 2021, Spotify released an in-app personalized experience called “Only You” which highlights artists, songs, genres, and other aspects of the music listening experience important to individual listeners. Along with “Only You” Spotify released “Blend,” a new way to create a personalized playlist with a friend. Spotify reported, “People seeking out songs is up 80 percent on personalized playlists and track saves are up by 66 percent” (Kastrenakes 2019). Currently, 220 of the top 500 (44%) followed editorial playlists on Spotify are categorized as personalized. Twelve of the top nineteen (63%) followed indie folk editorial playlists on Spotify are personalized.

## Feeder Playlists

Spotify editors often test tracks on what are referred to as “feeder” playlists. Feeder playlists are core playlists on Spotify with a smaller but devout listening audience. Tracks that perform well on feeder playlists, Fresh Folk (656,708 followers) and Folk Pop (730,116 followers) for indie folk acts, graduate to the larger playlists Your Favorite Coffeehouse (3.8 million) and Relax & Unwind (3.6 million). Eight of the artists in this study (73%) have been placed on Fresh Folk and three of the artists (27%) have been included on Folk Pop. Fresh Folk is a frontline playlist totaling 150 songs and adding 10 to 15 new songs each week. Artists typically spend 10 to 12 weeks on Fresh Folk with an average total stream of 36,837 streams per artist. Folk Pop is a catalog personalized playlist and the three artists from the study included on it averaged 565,784 streams while on the playlist (Table 6).

Playlist	Followers	Listeners	Streams	Streams per Listener	Average Streams per Artist	Occurrences	Percent of Acts
Fresh Folk	656,708	224,165	294,698	1.31	36,837	8	73%
Folk Pop	730,116	814,964	1,697,621	2.08	565,874	3	27%

Table 6. Examples of feeder playlists and associated streaming data with Fresh Folk and Folk Pop.

### Saves, Skips, and Completions

Spotify utilizes several metrics to determine the performance of a song on a playlist including save rate, completion rate, and skip rate. Spotify counts a stream when a song has been listened to for thirty seconds. The average listener skips is 14.65 times per hour on Spotify (once every four minutes) (Owsinski 2018). Music blogger Paul Lamere analyzed billions of streams from millions of Spotify listeners all over the world to learn about skip rates (Owsinski 2018). Lamere found that a listener is 24.14% likely to skip a track in the first five seconds, 28.97% in the first ten seconds, 35.05% in the first 30 seconds, and 48.6% skip before the song finishes (Lamere 2014).

Spotify for Artists offers data on save rate but does not provide data for completion rate or skip rate in the Spotify for Artists dashboard. Save rate is calculated by dividing the number of saves for a song by the number of listeners. A save is indicated when a listener likes a song by tapping the heart icon “saves to their library” or when someone adds a song to a playlist. A 2019 *Hypebot* article suggests anything above 10% is a “good” save rate (Donoghue 2019). Kieron Donoghue states in his article, “During my years of studying stats for hundreds of artists I typically see save rates of between 3% to 7% on average.”

The artists in this study averaged an overall save rate of 12%. The save rate for the top five most streamed songs drops 4% to 5% on average for all acts. The top 18 streamed songs for the artists in the study average a 6% save rate. Many of the top performing acts receiving editorial inclusion had save rates in the 2% to 4% range. The lower save rate for top streamed songs is largely due in part to editorial playlists’ “lean back” listening experience. Save rate is one of the indicators Spotify considers for inclusion in algorithmic playlists (Table 7).

Save Rate/All Artists	Established	Mid-level	Developing
Save Rate: All Acts, All Songs	12.1%	11.8%	12.9%
Save Rate: Top Five Songs	8.2%	7.9%	7.6%
Save Rate: Top Ten Songs	9.2%	8.6%	8.8%

Table 7. Save rates for established, mid-level, and developing artists. Save rate diminishes for top songs that receive editorial playlist inclusion.

## Algorithmic Playlists

Artists in the study earned 108 million streams (19%) of the 569 million total lifetime streams from algorithmic playlists on Spotify. Algorithmic playlists are playlists that are automatically created for each user by Spotify’s software algorithms. Spotify monitors each user’s music listening habits and uses this information to produce highly personalized playlists (Tools & Resources Staff 2021). The four primary algorithmic playlists on Spotify are Daily Mix, Discover Weekly, Release Radar, and Radio.

The Daily Mix is a daily playlist that consists of six pre-mixed playlists inspired by a user’s favorite music. Spotify incorporates clustering technology to identify subgroupings within listening patterns to build recommendations for each daily mix playlist (Spotify Newsroom 2018). Discover Weekly is a weekly playlist updated every Monday featuring music the user is likely to enjoy based on artists, albums, and tracks that user likes, shares, skips, and saves to a playlist (Tools & Resources Staff 2021). Release Radar is a weekly playlist updated every Friday featuring new music by artists a user currently follows on Spotify (Tools & Resources Staff 2021). Radio is a “radio station” playlist curated by Spotify that consists of 50 songs including approximately 5 songs from the core artist and 45 songs from similar artists. Radio has the largest share of streams (52%) and the highest listener per stream ratio (5.33) for the artists in the study. Radio is the top ranked algorithmic playlist for established acts, Discover Weekly and Radio rank highest for mid-level acts, and Daily Mix ranks at the top for developing acts. Daily Mix has the second highest listener to stream ratio (4.47) among the four algorithmic playlists (Table 8).

## User-Generated Playlists

User-generated playlists make up just 4.2 million streams (0.7%) of the 569 million streams from the artists in the study. The established acts

Spotify Algorithmic Playlists	Listeners	Streams	Share of Streams	Streams per Listener
Radio	9,549,412	50,888,757	51.9%	5.33
Daily Mix	7,282,312	32,582,633	33.3%	4.47
Discover Weekly	4,565,148	12,186,208	12.4%	2.67
Release Radar	962,319	2,312,620	2.4%	2.40
Totals	22,359,191	97,970,218	100%	4.38

Table 8. Share of streams and streams per listener across the eleven artists in this study.

derive 1% of their streams from user-generated playlists, mid-level acts derive 2% of their streams from this source, and developing acts derive 21%. The eleven artists in the study have been included on 672 user-generated playlists and only one of these user-generated playlists (Sony’s Filtr) gained more than 75,000 streams for a song while on the playlist. Just 6% of songs on user-generated playlists achieved more than 5,000 streams (Table 9).

User-Generated Playlists	5,000+ Streams	10,000+ Streams	25,000+ Streams	50,000+ Streams	100,000+ Streams
672 Playlists	6%	3%	1%	0.6%	0.1%

Table 9. Only one percent of songs included on user-generated playlists for the eleven artists in the study gained 25,000 or more streams.

## Geographic Assessment and Trigger Cities

### Overview

It was important to establish where audiences were listening on Spotify for the eleven artists in the study. In analyzing top cities, Chartmetric provided the “Top 50” cities for each artist based on Spotify’s Monthly Listener counts. We used the final reporting period of Top 50 cities on March 4, 2021 as determined by monthly listeners to establish top cities for the artists.

There are several ways to assess top cities. We explored five primary methods: Universal Cities, Average Ranking, Average Ranking of Univer-

sal Cities, Total Monthly Listeners, and finally a comparison (index) of monthly listeners to population.

**Geographic Profile:  
Eleven Indie Folk and Americana Artist Cohort**

**Universal Cities**

In this analysis, we have the potential of 550 total cities if there was no crossover and each artist had a unique set of locations where they were most popular. Overall, there were 129 unique cities represented across the eleven artists. The distribution of appearances is indicated in Table 10.

<b>Cities on X of 11 Artist's Top 50</b>	<b>Count</b>	<b>Percentage</b>
X = 11	10	7.75%
X = 10	13	10.08%
X = 9	3	2.33%
X = 8	3	2.33%
X = 7	7	5.43%
X = 6	10	7.75%
X = 5	6	4.65%
X = 4	7	5.43%
X = 3	7	5.43%
X = 2	7	5.43%
X = 1	56	43.41%
<b>Total</b>	<b>129</b>	<b>100.00%</b>

Table 10. Distribution of the frequency of cities in the Top 50 for our eleven-artist cohort.

In this scenario, cities that appeared on all eleven artists' Top 50 were deemed Universal Cities. 7.75% of the cities in this study appeared on all artist's Top 50 lists:

1. Chicago, Illinois
2. Denver, Colorado
3. New York City, New York
4. Dallas, Texas
5. Seattle, Washington

6. Los Angeles, California
7. Atlanta, Georgia
8. Toronto, Ontario, Canada
9. Montreal, Quebec, Canada
10. Brisbane, Queensland, Australia

### Average Ranking of Universal Cities

As we refined this geographic data, defining the ranking for only the Universal Cities (appearing on all eleven artist’s Top 50) the most influential cities became more important (Table 11).

City	Number of Top 50s (Maximum of 11)	Average Ranking
Chicago	11	3.7
Denver	11	5.3
New York City	11	7.7
Dallas	11	8.6
Seattle	11	8.9
Los Angeles	11	9.5
Atlanta	11	10.9
Toronto	11	14.5
Montreal	11	17.4
Brisbane	11	31.9

Table 11. Ranking of cities that appeared in all Top 50 lists for our eleven-artist cohort.

In this analysis these cities are higher ranked in part because they have higher populations. Nine of the ten cities are in North America with the top seven located in the United States and two in Canada. Brisbane, Australia was the only city outside of North America to appear as a Universal City.

### Total Monthly Listeners

In analyzing the total monthly listeners for each city in our data set we find that Universal Cities tend to rise to the top of the rankings by total number of monthly listeners. There were a few notable cities that only appeared on nine of the eleven artist’s Top 50 cities but ended up in the top 15 by monthly listeners: Charlotte, North Carolina (11th with 29,604

monthly listeners) and Houston, Texas (14th with 26,271 monthly listeners). Again, city population is closely aligned, though not perfectly correlated, with the cities at the top of this list.

	<b>City</b>	<b>Count</b>	<b>Aggregate Monthly Listeners on Spotify</b>
1.	Denver	11	63,804
2.	Chicago	11	61,766
3.	Atlanta	11	52,533
4.	Dallas	11	46,037
5.	Seattle	11	44,457
6.	New York City	11	40,317
7.	Los Angeles	11	39,659
8.	Minneapolis	10	35,063
9.	Montreal	11	31,511
10.	Toronto	11	30,522
11.	Charlotte	9	29,604
12.	Portland	10	29,053
13.	London	10	27,024
14.	Houston	9	26,271
15.	San Francisco	10	25,535
16.	Sydney	10	25,255
17.	Austin	10	21,492
18.	Brooklyn	10	21,470
19.	Washington	10	20,407
20.	Vancouver	10	20,092
21.	Calgary	10	20,012
22.	Salt Lake City	10	20,012
23.	Philadelphia	10	19,154
24.	Cleveland	8	18,128
25.	Berlin	7	16,737

### Population to Monthly Spotify Listeners

For an accurate picture of the cities that stream more than others we must create an index based upon the population of each city. Using data for each city, we calculated a ratio between the population and monthly listeners. The goal is to determine whether certain cities stream at a higher rate than others. The index gives us that opportunity to compare cities on a similar metric.

In analyzing the total monthly listeners to the city population, we find there are several cities that emerge with these artists reaching five

percent or greater than the city population including Seattle, Minneapolis, Denver, Salt Lake City, and Atlanta (Table 12).

City	Monthly Listeners	Population	Value (Monthly Listeners/Population)	Percent of City
Atlanta	52,533	506,811	0.103654025	10.37%
Salt Lake City	20,012	200,567	0.099777132	9.98%
Denver	63,804	727,211	0.087737947	8.77%
Minneapolis	35,063	429,606	0.081616644	8.16%
Seattle	44,457	753,675	0.058986964	5.90%
Cleveland	18,128	381,009	0.047578929	4.76%
Portland	29,053	654,741	0.044373271	4.44%
Zurich	15,110	428,700	0.035246093	3.52%
Dallas	46,037	1,343,573	0.034264606	3.43%
Charlotte	29,604	885,708	0.033424108	3.34%
Vancouver	20,092	631,486	0.031817016	3.18%
San Francisco	25,535	881,549	0.028966059	2.90%
Washington	20,407	705,749	0.028915379	2.89%
Chicago	61,766	2,693,976	0.02292745	2.29%
Austin	21,492	978,908	0.021955076	2.20%
Montreal	31,511	1,704,690	0.018484886	1.85%
Calgary	20,012	1,239,220	0.016148868	1.61%
Edmonton	14,371	932,546	0.0154105	1.54%
Amsterdam	15,501	1,157,519	0.013391573	1.34%
Philadelphia	19,154	1,584,064	0.012091683	1.21%
Houston	26,271	2,320,268	0.011322399	1.13%
Toronto	30,522	2,731,570	0.011173794	1.12%
Los Angeles	39,659	3,979,576	0.009965635	1.00%
Phoenix	15,872	1,680,992	0.009442044	0.94%

Table 12. Monthly listeners as a percent of city population.

Note that Chartmetric defines New York City and Brooklyn as two separate markets. If we combine New York City (40,317) and Brooklyn (21,470) monthly listeners (and compare it to the New York City popula-

tion of 8,336,817 we see 0.74%. This percentage does not crack the top 25 markets but is worth noting due to how the population data was gathered.

### Geographic Profile:

#### All Chartmetric Indie Folk and Americana Tagged Artists (2,501 Total Acts)

#### Universe of Artists + Geography

The entire indie folk/Americana data set consists of 2,501 artists. If we simply count which cities show up on the top 50 locations as determined by the number of monthly listeners on Spotify, we find that Chicago is present on approximately 75% of all artist's top markets. Overall, there are 2,072 cities represented within the artists' Top 50. This metric is simply a count of occurrences within the top 50 and not a measure of monthly listeners within each city. Of note, 15 of the top 25 cities are in the United States and 10 are international cities. Canada represents three of the international cities, so North America is largely responsible (18 of 25) for the most frequently represented cities appearing across all artists within the genre:

	<b>City</b>	<b>Country</b>	<b>Count</b>	<b>% of occurrences in Top 50</b>
1.	Chicago	US	1562	75%
2.	Los Angeles	US	1552	75%
3.	New York City	US	1540	74%
4.	London	GB	1515	73%
5.	Toronto	CA	1494	72%
6.	Sydney	AU	1492	72%
7.	Atlanta	US	1490	72%
8.	Dallas	US	1489	72%
9.	Seattle	US	1488	72%
10.	Denver	US	1487	72%
11.	Montreal	CA	1437	69%
12.	Melbourne	AU	1391	67%
13.	Houston	US	1388	67%
14.	San Francisco	US	1373	66%
15.	Brooklyn	US	1368	66%
16.	Portland	US	1329	64%
17.	Minneapolis	US	1311	63%
18.	Brisbane	AU	1281	62%
19.	Berlin	DE	1255	61%
20.	Vancouver	CA	1243	60%

21. Austin	US	1203	58%
22. Amsterdam	NL	1193	58%
23. Philadelphia	US	1162	56%
24. Charlotte	US	1152	56%
25. Madrid	ES	1100	53%

When we consider monthly listeners for all artists within the genre, there is a deeper international presence among the top results. International cities represent 15 of the top 25 cities as measured by the aggregate total listeners per city.

At the time of data capture, prior to the start of our campaign, there were 366,731,330 aggregate non-unique monthly listeners within the genre. We can establish which cities listen to the genre by dividing the city listeners by the aggregate total listeners to establish the city consumption percentage across all acts:

	City	Country	Aggregate Total Monthly Listeners per City	City Consumption Percentage
1.	Chicago	US	13,812,335	3.77%
2.	Sydney	AU	13,553,788	3.70%
3.	London	GB	12,907,994	3.52%
4.	Los Angeles	US	12,668,988	3.45%
5.	Mexico City	MX	10,551,924	2.88%
6.	Atlanta	US	10,239,128	2.79%
7.	Dallas	US	10,107,624	2.76%
8.	New York City	US	10,052,740	2.74%
9.	Brisbane	AU	9,789,025	2.67%
10.	Melbourne	AU	9,468,440	2.58%
11.	Denver	US	8,979,392	2.45%
12.	Seattle	US	8,048,295	2.19%
13.	Toronto	CA	7,433,793	2.03%
14.	Amsterdam	NL	7,418,393	2.02%
15.	Houston	US	7,039,636	1.92%
16.	Berlin	DE	6,994,636	1.91%
17.	Montreal	CA	6,923,387	1.89%
18.	Dublin	IE	6,737,096	1.84%
19.	Paris	FR	6,647,142	1.81%
20.	São Paulo	BR	6,360,999	1.73%
21.	Santiago	CL	6,082,268	1.66%

22. Brooklyn	US	5,899,526	1.61%
23. Perth	AU	5,755,603	1.57%
24. San Francisco	US	5,721,982	1.56%
25. Madrid	ES	5,643,864	1.54%

### Share of Listening Across the Genre

Looking at the data across all acts within the genre it is clear the top 100 cities drive consumption with a 90% share of listeners. However, the top 50 cities comprise 83% of monthly listeners and one would assume it will produce diminishing returns if marketing reach is beyond the 50 cities (Figure 6). Contrary to this belief, the results of the advertising campaign we ran as part of this study demonstrates global opportunities exist for indie folk and Americana artists outside of the top 50 or 100 streaming markets.

Total Listeners by City	Share of Listeners
Top 10 Cities .....	31%
Top 25 Cities .....	59%
Top 50 Cities .....	83%
Top 100 Cities .....	96%

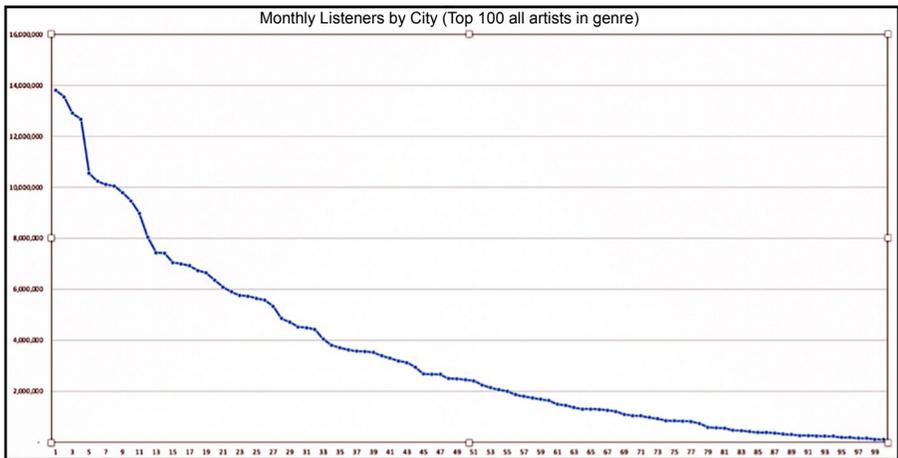


Figure 6. Visual representation of the Top 100 cities (X axis) by aggregate monthly listeners within that city (Y axis) for Indie/ Americana music.

## Trigger Cities Advertising Campaign – Method and Results

### Overview

We developed a comprehensive advertising campaign on Facebook and Instagram for the eleven artists in the study to determine if we could introduce the artists to new audiences in the global music marketplace. The campaign ran for twenty-nine days via Facebook and Instagram feed ads directed to artist Spotify playlists. The artist playlists were curated by Spotify as “This is” discography playlists from their catalog or curated by the artist as “This is” or “Favorite Songs” via artist user-generated playlists on their profile. Each artist playlist included a minimum of thirty songs and the call to action for consumers was to follow the artist playlist and/or stream the featured song. The ads consisted of a fifteen-second video featuring the artist’s music and image and were delivered on Facebook’s Ads Manager and Found.ee. The advertising budget ranged from twenty to thirty dollars per day, per artist, and was equally distributed between Facebook and Instagram for all artists, concluding on June 19, 2021.

### Advertising Targeting – Geographic Regions

Our research from Chartmetric’s database of 2,501 indie folk artists suggested North America, Australia, and Western Europe are the primary regions for streaming activity on Spotify. When determining geographic ad targeting, we included North America, Australia, and Western Europe and expanded the geographic radius to explore advertising audiences in additional regions based on the global population of Spotify users:

*Targeted regions:* Antilles, Argentina, Austria, Australia, Aland Islands, Belgium, Bulgaria, Saint Barthélemy, Bolivia, Brazil, Canada, Switzerland, Chile, Colombia, Costa Rica, Czech Republic, Germany, Denmark, Dominican Republic, Algeria, Ecuador, Egypt, Spain, Finland, France, United Kingdom, French Guiana, Equatorial Guinea, Greece, Guatemala, Hong Kong, Hungary, Indonesia, Ireland, Iceland, Italy, Japan, Luxembourg, Morocco, Monaco, Malta, Mexico, Malaysia, Netherlands, Norway, New Zealand, Peru, French Polynesia, Philippines, Poland, Portugal, Paraguay, Russia, Sweden, Singapore, El Salvador, South Africa, French Southern Territories,

Thailand, Tunisia, Turkey, Taiwan, United States Minor Outlying Islands, United States, Uruguay, U.S. Virgin Islands, and Vietnam

### Advertising Targeting – Related Artists

We developed a list of targeted artists known as “related artists” to reach indie folk and Americana music audiences for the ad campaign. The ads targeted fans of these related artists on Facebook and Instagram in the geographic regions we selected. Related artists included The Lumineers, The Head and the Heart, Gregory Alan Isakov, The Avett Brothers, Mumford & Sons, Lord Huron, The Paper Kites, Rayland Baxter, Fleet Foxes, The Shins, First Aid Kit, Andrew Bird, Father John Misty, Band of Horses, Mandolin Orange, Sharon Van Etten, Phoebe Bridgers, Dawes, Lake Street Dive, and others. Each artist in the study had their own distinct grouping of related artists for the ad campaign.

### Advertising Targeting – Age Demographic

The distribution of listener’s age from Spotify for Artists data displayed a broad range of listeners aged eighteen to fifty-nine years old (see Figure 7) evenly weighted between male and female. Therefore, the initial ad campaign targeted a diverse range of ages to reach a broad audience of Spotify users who listened to indie folk and Americana music. The ads were directed to a landing page that was embedded with a pixel to provide insights regarding demographic and geographic profiles. After measuring reach and impressions from the initial campaign, we refined the ad by retargeting users who watched the video or clicked on the ad previously as well as expanding the initial interest audience. Prior to the start of the

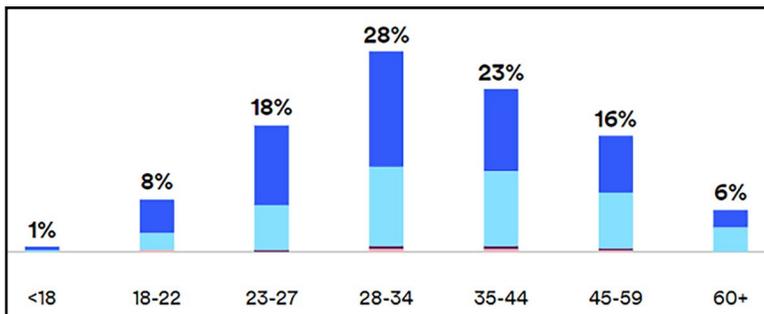


Figure 7. Distribution of listeners' ages for one of the eleven artists in the cohort.

campaign Apple launched several iOS 14 updates impacting app tracking. Due to privacy concerns, Apple provided iPhone consumers the option to opt out of tracking advertising activity through mobile devices (Miller 2021). This iOS update limited the scope of data available when assessing the results of the campaign.

### Ad Campaign Results

Advertisements were served to audiences in seventy-four countries reaching 1,617,313 impressions and 23,591 total ad engagements or clicks with a 1.46% click through rate. The results outperform the average Facebook click through rate of 0.90% and indicate opportunities exist beyond the United States and Australia for indie folk artists (Irvine 2020). A total of 80% of ad clicks emanated from the top ten returning countries, all based outside of North America and Australia including Brazil, The Philippines, and Mexico; all of these regions are considered trigger cities/countries. Looking beyond these territories, Algeria, Egypt, Tunisia, and Vietnam appeared in the top ten (Table 13).

Country	Total Ad Clicks	Share of Total Ad Clicks
Brazil	5,255	22.28%
Philippines	4,006	16.98%
Algeria	2,103	8.91%
Mexico	1,984	8.41%
Egypt	1,554	6.59%
Tunisia	1,113	4.72%
Vietnam	1,049	4.45%
Morocco	906	3.84%
Indonesia	569	2.41%
Peru	567	2.40%
United States of America	553	2.34%
Turkey	484	2.05%
Argentina	348	1.48%
Bolivia (Plurinational State of)	252	1.07%
Guatemala	233	0.99%

Table 13. Top countries for ad engagement based upon ads served with the Found.ee landing page.

When assessing streaming activity for the artists on Spotify for Artists, there were several other territories, not listed in the top ten ad markets, over-indexing a return including Japan, Bolivia, Finland, and Spain. Several of the trigger city regions are also over-indexed on Spotify including Brazil, Indonesia, Turkey, and Australia.

Developing artists in the study averaged 2,986 clicks during the campaign while mid-level (1,614) and established (1,729) experienced similar engagement (Table 14). Advertising clearly benefited the developing artists in this study as the playing field was leveled in regions outside of the United States.

Artist Stage	Average Clicks on Their Ads
Developing	2,986
Mid-level	1,614
Established	1,729

Table 14. Average engagement for the advertising campaign by stage of artist career.

### Cost Per Follower

One critical measure to establish the usefulness of a campaign is to analyze the cost per follower. Artist teams need to be sure they will be able to monetize each follower over the lifetime of an artist’s career. The cost to establish a follower is an important measure when looking at the financial life of an artist. If the cost per follower is too high, building an audience could be an expense that does not financially align. In our campaign, we realized a cost per follower of \$3.79. Many artists have pivoted to digital strategies during the COVID pandemic driving up the cost effectiveness for advertising over the past year.

If we look at the impact of the campaign on playlist growth, we see that playlist followers grew by an average of almost 350% for all artists. The range of growth varied as one artist playlist following grew by 2,500% and another grew only 2.5% (Table 15). If we segment growth by the stage of the artist career, developing artists benefited most significantly from the ad campaign. The average playlist follower growth was 736% for developing acts. Mid-level acts grew their playlists at an average of about 169%, and established acts experienced the lowest growth of 72% (Table 16).

Minimum Growth	2.49%
Maximum Growth	2,500.00%
Average Growth	349.00%

Table 15. Minimum, maximum, and average playlist follower growth for the eleven artists in the study.

Developing	736%
Mid-Level	169%
Established	72%

Table 16. Average playlist follower growth by stage of career for the eleven artists in the study.

When analyzing save rates, artists were segmented by career stage. Results indicate developing artists received the highest save rate on Spotify for songs used in the campaign averaging a 25% save rate, seventeen percentage points above the average save rate of 8% for the life of a song. Mid-level and established artists had lower save rates during the campaign (Table 17).

Artist Stage	Average Save Rate During 28-Day Study	Average Save Rate for Life of Song
Developing	25%	8%
Mid-Level	8%	13%
Established	3%	7%

Table 17. Change in save rate by stage of career.

## Conclusion

This paper explores opportunities for artists on digital streaming music service providers to expand their reach through paid ads on social media. It explores geographical market expansion by considering a new set of targeted “trigger” cities. The study of eleven indie folk and Americana artists outlines the importance of playlist inclusion to build an audience and presence on streaming platforms. The type of playlist and track placement play a large role towards gaining an audience on Spotify, while only a small percentage of artists’ songs are responsible for streams from their catalog. Perhaps artists might consider a singles-based release strat-

egy spread out over a period of time to give each song an opportunity for playlist consideration. The results of the Chartmetric geographic study indicate key markets for folk and Americana artists which include many regions and cities not listed in the original trigger cities study. Artists from different genres may have a unique set of trigger cities to consider when targeting audiences globally. Paid ads on social media had the greatest impact on developing artists, supporting Jenkins' trigger cities theory that new markets and new audiences are inclined to engage with emerging talent. Considering the low barrier to entry, competition is fierce in the digital music market landscape. Artists are engaging in traditional and non-traditional marketing efforts (playlists, paid media, etc.) to build global audiences.

### Future Research

Additional research targeting outlier regions derived from the results of this study could be explored to determine if these audiences are viable listeners over an extended period, therefore potentially driving additional long-term revenue. Other regions not explored in this research could be included in the geographic audience set. Niche genres (indie rock, alternative rock, metal, jazz) could be studied using this method as a baseline to explore global audiences for artists. A follow-up study could be conducted on other platforms (TikTok, YouTube) to explore their relevance and potential to build a global audience for the acts in this study.

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# **Should We Hire the Pianist or the Attorney? A Study of the Educational Profiles of Music Industry Faculty**

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## **Abstract**

Hiring a music industry studies tenure-track faculty member can be a difficult task because there is no universally accepted corresponding doctorate degree within the discipline. What constitutes a terminal degree in music industry studies is determined by the institution and department where the program is housed and not necessarily the music industry studies discipline. Search committee members, especially those from outside the music industry studies field, may have a difficult task finding a suitable candidate who can meet the needs of the industry, which values professional experience; the requirements of central administration, which values academic credentials; and the needs of students, who want a relevant education leading to employment.

Finding a candidate who has the prerequisite professional experience and whose academic experience conforms to institutional scholarship expectations and norms not only creates potential headaches for search committee members outside of the discipline, but, as noted in a 2007 National Association of Schools of Music (NASM) report, some candidates hired to teach in the discipline have struggled to gain promotion at their institutions. Now thirteen years after the publication of the NASM report, this study looks at the educational profiles of music industry professors who are tenured or on the tenure track to provide guidance to search committees charged with hiring a tenure-track music industry studies colleague and evaluates if the issues highlighted in the NASM report still exist.

Keywords: music industry studies, music industry degrees, music industry faculty, music industry faculty tenure, music industry faculty promotion

## Introduction

After years of pressure from falling enrollment and an institutional shift towards professional studies and away from a liberal arts educational model, a music department convinces the administration to approve a music industry degree program to increase enrollment and align the department closer with the institution's mission. With the help of local music industry professionals teaching as adjunct faculty members, the program is a success. Due to the increase in student numbers, the administration approves a tenure-track faculty line for the music industry program.

The hiring committee writes a job description that is consistent with current norms in the discipline—requiring the candidate hold a relevant terminal degree based on the institution's terminal degree requirements, and have relevant music industry experience.<sup>1</sup> The job is posted nationally and soon applications begin to trickle in.

As the hiring committee members thumb through the applicant pool, a number of questions arise: what is a relevant terminal degree for a professor of music industry studies? Does our institution acknowledge master's degrees or professional doctorate degrees as terminal degrees for a tenure-track position? Should we look at candidates with a Juris Doctor or MBA who have no experience in academia? Is a master's or baccalaureate degree sufficient if the candidate has significant music industry experience? Will candidates with the most music industry experience, but non-traditional terminal degrees, be able to face the rigors of scholarship expected by our institution? Since the position will be housed in the music department, should we consider only candidates with advanced music degrees? The committee may even question whether they even understand the qualifications that are necessary to fill the position since their educational backgrounds are likely rooted in traditional music studies. They may question whether their backgrounds even prepares them to assess a candidate's business and legal knowledge and experience.

While the above hypothetical scenario may not accurately reflect the manner in which all music industry studies programs are created, there are a few generalities that are consistent with many of them. First, based on the Music and Entertainment Industry Educators Association's (MEIEA) member institutions, over 70 percent of music industry studies programs are housed in a music department.<sup>2</sup> While there are a number of notable programs housed in the communications or business departments, many programs were originally developed in a music department, though pro-

gram histories are difficult to trace.<sup>3</sup> Second, it is conceivable that the first tenure-track faculty position dedicated to that program, and possibly subsequent searches, were hired by faculty members whose areas of expertise were rooted in a traditional music specialty since the majority of MEIEA institutions have only one full-time faculty designated to music industry studies.<sup>4</sup> Because of this, the committee may struggle to evaluate the significance of a potential candidates' education or music industry experience because most positions require a significant amount of business and legal knowledge which typically falls outside of the traditional musical scholar's field of study. Also, the committee might be concerned about candidates with the prerequisite professional experience but who hold degrees outside the departmental or institutional norm due to the importance of hiring faculty members who will be able to withstand the scrutiny of a university tenure committee. Finally, because there is no specific doctorate degree for music industry studies, the terminal degree requirement is often open to degrees from many disciplines of study and is determined by each institution's definition of a terminal degree with little or no guidance from the discipline of music industry studies as to what constitutes an appropriate degree.<sup>5</sup> Therefore, the committee must analyze how each candidate's terminal degree applies to their professional experience or scholarship in the music industry. In light of these challenges, the committee must evaluate a candidate's potential ability to progress in the ranks of academia and the administration must ensure that the candidate has credentials that are in line with institutional policies.

The purpose of this study is to determine what are currently considered to be relevant terminal degrees in music industry studies and in what disciplines current music industry studies professors obtained their highest earned degree. Most job postings for tenure-track music industry studies positions require the candidates to have a relevant terminal degree and a number of years of experience working in the music industry. While some job postings occasionally ask for, or prefer, specific degree types or experience, the language is typically broad and open to interpretation by search committee members or hiring managers.<sup>6</sup> Because of the emphasis on experience, a candidate's degree type is not the only factor that is predictive of potential success in academia or the ability to be an effective instructor. While a study that considers professional experience should be considered in the future, this study provides data and analysis to learn which terminal degrees successful faculty in the discipline have obtained. Hopefully, this

study will provide some guidance and insight for administrators and faculty members outside the music industry studies discipline who are tasked with making hiring decisions.

This study focuses on faculty members who have the rank of assistant professor or higher and only includes those who teach music business or music law courses as opposed to music technology courses. As mentioned, because most degrees, aside from the master's degree in music industry studies, do not directly relate to the field, understanding the educational backgrounds of music industry faculty based on rank might yield some indication of the future success of instructors recently hired into tenure-track positions. With that in mind, this study is in no way intended to bar certain degree types from the discipline. However, since there are no bright line rules within the discipline concerning educational background and, in some cases, candidates are being hired into the discipline by committees where there is no committee member or a minority of committee members with any expertise in the music industry studies discipline, it is important to provide some guidance to ensure qualified candidates are not kept out of the music industry studies discipline due to departmental or administrative ignorance.

A number of inconsistencies concerning hiring, tenure, and promotion in the music industry studies discipline were outlined in a report by the National Association of Schools of Music in 2007.<sup>7</sup> The report highlights issues with tenure committees' difficulties understanding scholarship in the music industry studies discipline and deemed hiring practices where some departments consider a bachelor's degree to be a terminal degree in the discipline as problematic.<sup>8</sup> The report raised concern that faculty with only a bachelor's degree may not have sufficient academic background to reach the level of research and scholarship expected for tenure and promotion. It should be noted that the report does not provide data of which degrees were held by music industry studies faculty who were successfully promoted by their institutions.<sup>9</sup> Now, over a decade later, this current study looks specifically at what degrees are held by music industry studies faculty members and evaluates what degrees they hold based on rank to determine if issues with hiring and promotion still exist in music industry studies.<sup>10</sup>

This study was influenced by one conducted by Betty Medsger in 1996 that reviewed the hiring trends in the journalism discipline. It concluded that programs were hiring candidates based on academic creden-

tials as opposed to work experience.<sup>11</sup> This was a shift in practice in the discipline, and the study's conclusions caused a great deal of public tension between the journalism community and academic programs.<sup>12</sup> One of the goals of this study is to see if there is any indication that music industry studies, which is a professional studies discipline, was heading in a similar direction. If so, this would indicate that an additional study is needed to examine whether the music industry studies discipline is serving the industry for which it claims to prepare students. A large number of faculty members holding PhD Degrees, in and of itself, would not indicate that institutions were hiring faculty in the music industry studies discipline based on academic credentials as opposed to those who have experience in the field. However, if that were the case, it would be unusual since the MBA and Juris Doctor (JD) are often preferred, or required, degree types for high level industry positions and anecdotal evidence suggests a PhD can hinder an applicant seeking a job in the music industry.<sup>13</sup> While this study does not directly address this issue of experience verses academic credentials, degree types may show the possibility of a hiring trend that favors scholars over professional practitioners.

Below are the central questions the collected data directly answer:

1. How common are tenure-track and tenured faculty members who hold a bachelor's degree as their highest degree earned?
2. Based on rank, what type of academic degrees do music industry studies faculty members hold as their highest degree earned?
3. Based on rank, what fields of study are most common among music industry studies faculty members?

## Methodology

This study used data collection techniques that have been used by similar studies in other disciplines to determine the prevalence of certain types of terminal degrees of current faculty.<sup>14</sup> The data was collected from university and college faculty websites, university catalogs, faculty members' biographies (from publications and presentations), interviews, university handbooks, other news articles, the LinkedIn social media site, and publicly posted Curriculum Vitae. The faculty members sampled were from institutions that were listed as members of the Music and Entertainment Industry Educators Association on the group's website. Based on publicly available information, eighty-eight faculty members from

MEIEA institutions met the criteria for this study based on the information each school or faculty member publicly provided.

While music technology is a crucial part of many music industry programs, this study focuses on faculty members who primarily teach music business, music law, recording industry history, and arts management related courses as opposed to those who teach music technology, songwriting, coach commercial music groups, or primarily teach traditional music courses. Especially in smaller programs, there are faculty members whose teaching load crosses over between music business and technology, general music, or commercial music courses. In those cases, professors who taught at least two music business courses during the previous academic year are included in the study. The above information was publicly available through the institutions' online searchable course catalogs.

Data was only collected on faculty members who had the rank of assistant professor or higher. Faculty members who hold the titles of lecturer, instructor, or adjunct professor were not included. One problematic issue, in terms of academic rank, is that the data collected concerning faculty with the title assistant professor are not necessarily on a tenure-track depending on the institution and nature of the position. Because of this, the overall terminal degree data of the group may not accurately reflect the tenure-track population.

## Findings

### *1. How common are tenure-track and tenured faculty members who hold a bachelor's degree as their highest degree earned?*

As shown in Figure 1, only 5 percent of professors in the MEIEA faculty database hold a bachelor's degree as their highest degree earned. It is possible that some faculty who now hold a master's degree or higher were initially hired with a bachelor's degree. The NASM report in 2007 was very deliberate in highlighting the issue of music industry studies programs appointing faculty without graduate credentials but failed to list the percentage of faculty with only bachelor's degrees. Therefore, it is difficult to determine if the number of faculty with the bachelor's as the highest degree earned has changed since the NASM report was issued.<sup>15</sup> However, 5 percent of faculty without a graduate degree may be considered problematic by some observers. Since it is not unheard of for an institution to grant a tenure-track position to an individual without graduate credentials,

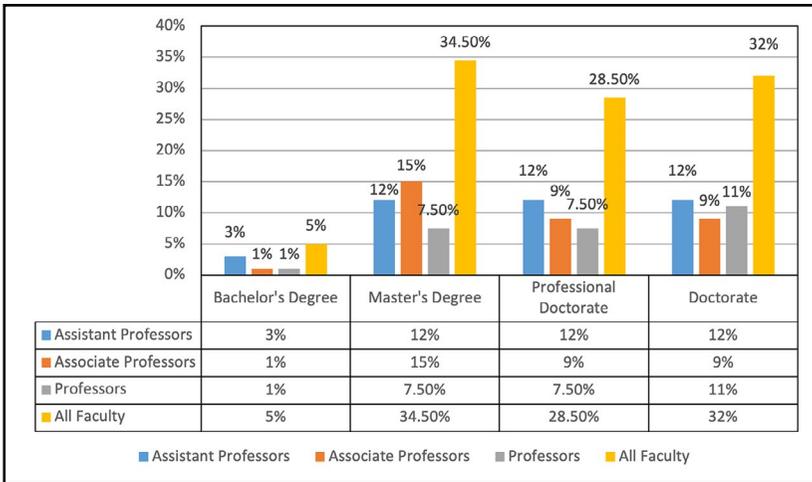


Figure 1. Based on eighty-eight faculty members from MEIEA member schools. Percentages have been rounded.

but who has made significant contributions to a discipline, it is unlikely this practice will end considering many music industry studies programs value professional expertise and focus on experiential learning. Further, there are many advantages to having a faculty member with significant professional experience on staff and in the classroom. While the practice may be more common in music industry studies programs than in other disciplines, it does not appear to be a common practice among tenure-track or tenured faculty and is instead reserved for special situations.

*2. Based on rank, what type of academic degrees do music industry studies faculty members hold as their highest degree earned?*

Academic degree types have been divided into categories: bachelor’s degrees (above), master’s degrees, professional doctorate, and doctorate. Each category is separately addressed below.

**Doctorate**

The Doctor of Philosophy (PhD) is universally accepted as the highest degree one can earn in most disciplines. However, this category also included Doctor of Musical Arts degrees and one Doctor of Arts degree because they are treated as terminal degrees in their respective disciplines.<sup>16</sup> Even though the specialization may correspond to a discipline where one could earn a PhD, they are generally acceptable degree types for tenure-

track positions.<sup>17</sup> While there are certain differences between these degree types, they were categorized together since they are all generally considered terminal degrees.

Thirty-two percent of music industry studies faculty hold a PhD or similar degree. This may be equivalent to the number of PhD instructors in other disciplines where the Master of Fine Arts (MFA) is often considered a terminal degree, like in theater or art. It should be noted that the MFA is not accepted as a terminal degree by all institutions in those fields since a PhD is offered in art and theatre.<sup>18</sup> This may be due to the professional experience requirements for most positions in music industry studies programs since it typically takes four years or longer to finish a PhD. Also, obtaining a PhD in the music industry, based on experiential evidence, does not lead to advancement in the industry.<sup>19</sup> The number of doctorate-holding faculty currently represented in this study suggests that relevant experience outweighs academic credentials in hiring decisions. This is not to infer that current faculty cannot have both experience and a PhD, but since 68 percent of the faculty surveyed do not hold a traditional doctorate degree, academic credentials are not the determining factor for hiring individuals to teach music industry studies. With that said, it does not mean that a traditional doctorate degree is not preferred in some cases.

The one category where faculty members with a doctorate degree seem to have greater success, compared to those earning a professional doctorate or master's, is at the rank of professor where 11 percent of all faculty with a doctorate hold that rank compared to 7.5 percent of those with master's degrees and 7.5 percent of those with professional doctorates. The 2007 NASM report outlined issues music industry studies faculty members were having achieving tenure and promotion at their institutions. While the data show that faculty without a doctorate are being promoted to associate professor at the same or greater numbers than faculty with doctorate degrees, a significantly higher number of doctorate degree holders have achieved the rank of professor compared to faculty with other degrees. It is possible that some institutions tend to award the rank of professor based on academic credentials. Another possibility is that faculty earn their doctorate as associate professors to achieve full rank. Finally, it may be that faculty members with master's and professional doctorates struggle to meet the high level of scholarship required for promotion to the highest rank. Regardless, looking at the data over time will indicate if this is an ongoing issue or just the current state of the discipline.

## Professional Doctorate

Overall, the number of faculty members in each category of degree type, with the exception of the bachelor's degree, are fairly even. The numbers do change based on rank but not in a manner that would lead a reasonable observer to conclude that success in music industry academia is limited to a certain degree type. There is one trend in the music industry studies discipline that is unique—the number of faculty who hold a professional doctorate, which is 28.5 percent. All of those who hold a professional doctorate have earned a Juris Doctor, which is addressed below. While it is not uncommon for practitioners in a field where a professional doctorate is needed for licensure to teach one or two courses directly related to their field, it is not common for them to hold a full-time faculty position. Music industry studies is an exception. As noted above, there may be an issue with gaining the rank of professor with this degree type, but 16.5 percent of music industry studies faculty hold the JD and have successfully achieved promotion at their institutions.

## Master's

Music industry faculty members whose highest degree earned is a master's degree make up the largest number of music industry studies faculty at 34.5 percent. Faculty in this category make up the largest number of associate professors. This indicates that a number of institutions consider a master's to be a terminal degree in music industry studies.

This is an important finding. There are disciplines which have historically accepted the MFA as a terminal degree (e.g., art, design, theatre, and creative writing) that now have PhD holders and candidates applying for positions.<sup>20</sup> One might wonder if a requirement for a doctorate will be more widely adopted in music industry studies. However, this study shows that, at the moment, there is a practice for institutions to widely accept a master's as a terminal degree in the discipline.

### *3. Based on rank, what fields of study are most common among music industry studies faculty members?*

Figure 2 shows the academic disciplines of the highest degree earned by the faculty members in this study. There are generally three home departments where music industry studies programs have emerged from or transitioned into. In most cases, music industry studies programs are developed and housed in a music department. Currently, over 70 percent

of the Music and Entertainment Industry Educators Association member programs are housed in a music department according to MEIEA membership.<sup>21</sup>

Music industry studies programs are also found in business and communications departments. Because of this, those disciplines are specifically listed in Figure 2 along with music business, arts administration, and law since they relate to the field. Since there are a number of faculty members who have a degree outside of these categories—in the education and humanities disciplines—those are listed as well.

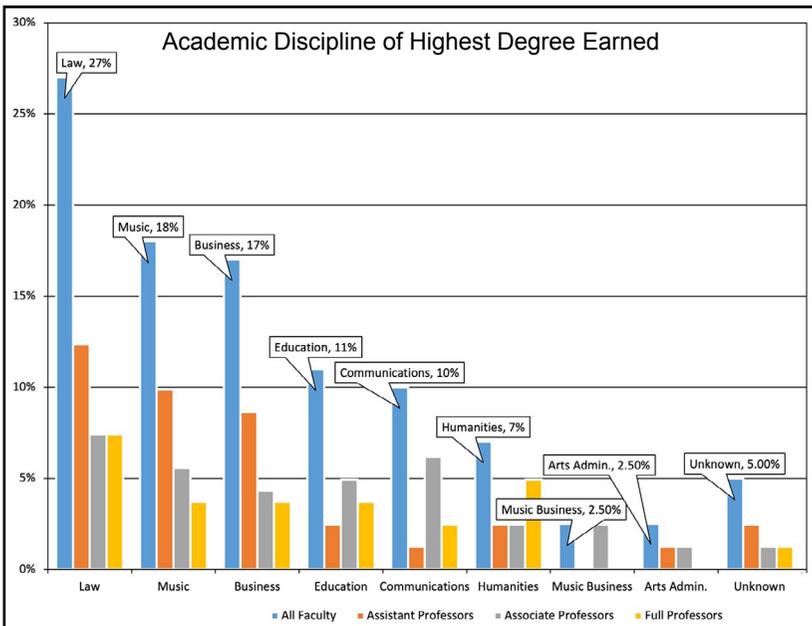


Figure 2. Discipline of highest degree earned. Based on eighty-eight faculty from MEIEA member schools. Percentages have been rounded.

## Law

In general, the most prevalent terminal degree in music industry studies is the Juris Doctor (JD). Based on the data collected, 27 percent hold a JD as the highest degree earned and the JD Degree is the most prevalent in each rank.

While it might seem unusual to an outsider that a terminal degree in the law would be the most common degree in the music industry field,

many fundamental concepts in music industry studies are based on the legal framework of contracts and intellectual property. There are a number of jobs in the industry that require attorneys and, often, music industry attorneys need to understand the industry on a macro and micro level while dealing with a variety of specific complex legal and business issues across different sectors in the music and entertainment industries.

The practice of hiring faculty with a JD has faced scrutiny in some disciplines because it is not a research degree but a professional degree. For example, in 2007 undergraduate and graduate criminal justice programs were instructed by their accreditation agency, the Academy of Criminal Justice Sciences, that they may only hire one JD for every ten faculty members.<sup>22</sup> The number of instructors in music industry studies with a JD indicates that it is an acceptable terminal degree at a number of institutions.

## Music

Overall, 18 percent of music industry studies faculty members hold a music degree as their highest degree earned. Roughly 62 percent of this group hold a doctorate degree and 38 percent hold a master's as their highest degree. Of those whose highest degree is a master's, only one also holds a second master's in the business field according to the data. Since over 70 percent of MEIEA members' music industry programs are located in a music department, and it is common for search committees to hire faculty whose backgrounds resemble their own, it might be logical to hypothesize that search committees would lean towards candidates with a graduate degree in music. This does not appear to be the case. While it may be presumable that administrators might avoid hiring outside the music field to show they are in alignment with the accreditation agency or institutional standards, the number of music industry studies professors who hold a terminal degree in music shows that, in general, some administrators are open to supporting hires with credentials outside the norm of the department. It is unusual for a tenure-track faculty member to hold a terminal degree in a discipline outside that of the home department, yet this study indicates it does occur with regularity in music industry studies.

## Business

Seventeen percent of music industry studies faculty members have a degree in business as their highest degree earned, and all of these degrees are master's degrees. The majority hold the MBA degree but there are a

few individuals holding a Master of Science. At roughly fourteen percent, the MBA is also the second most common graduate degree held by music industry studies faculty. No one in the study possesses a PhD in Business. It should be noted that some faculty members in the study hold degrees that could be considered business-related but they were granted from a communications department.

### Education

Eleven percent of music industry studies faculty members hold a graduate degree in education. Of the individuals in this category, 50 percent hold a doctorate and 50 percent hold a master's degree. This is interesting since these degrees are largely designed to make one an expert in teaching and learning and are typically earned by those pursuing educational administrative positions or to teach in an education department at the university level.<sup>23</sup> While the vast majority of job postings for music industry studies faculty positions require a terminal degree related to the music industry, a doctorate in education indicates a candidate is an expert in teaching and learning but it does not, on its face, indicate advanced knowledge of the music industry.<sup>24</sup> With that said, this study does not look at professional experience or master's degree types of those who hold a doctorate. Therefore, there may be other factors that could lead a search committee to consider a terminal degree seemingly unrelated to music industry studies.

### Communications

Because in recent years the music industry has been significantly impacted by how consumers share data and interact with music and media, and because the interest in cultural studies continues to increase, it would not be surprising to see a rise in the number of assistant professors with a terminal degree in communications. Instead, there are fewer music industry professors holding a communications degree at the assistant level compared to the associate level. As indicated in Figure 2, ten percent hold a degree in the communications field of study. Of those faculty members, 60 percent have earned a PhD and 40 percent have earned a master's as their highest degree.

## Humanities

Eighty-six percent of people in the study whose highest degree is in the humanities earned a PhD. The disciplines vary, but American Studies is the most common.

## Master of Music Business and Master of Arts Management

The faculty members who hold a master's degrees in arts administration or music industry as their highest earned degree may be discussed together because both degrees directly relate to music industry studies. Since there has been an increase in the number of master's in music industry degree programs, it is possible this degree type could create a pathway from graduation to academia without a number of years practicing in the field. Based on the numbers, it does not appear that recent graduates from these programs are being hired in this manner. This could indicate that graduates of the master's programs are more likely to seek jobs in the industry as opposed to higher education. It is also possible that search committees have a preference to hire candidates who have a more traditional degree, like the MBA. However, because the degree is relatively new, few graduates have the experience in the field the hiring committees are looking for. The data suggest that music industry related master's programs have not, at this point, become the preferred pathway to tenure-track jobs. This is not to say such a degree should not weigh as a positive factor alongside professional experience for potential faculty candidates but a master's in music industry is not necessarily favored over other related degrees.

## Conclusion

The purpose of this study was to evaluate the general profile of the academic background of music industry studies faculty, to see if there are any issues with tenure and promotion with candidates who hold a degree other than a PhD or other research-based doctorate, and to provide some guidance to help hiring committees and administrators, who are from outside of the music industry studies field, make informed decisions when hiring music industry studies faculty members.

While the profile varies, there are some clear conclusions that can be drawn based on the data. First, there is no PhD degree type that is commonly held by music industry studies faculty. As Figure 2 indicates, faculty who do hold PhDs and other research-based doctorates earned their degrees in fields as far apart as Educational Leadership to American Studies. It is more common for music industry studies faculty members to hold

a Juris Doctor, a master's degree, or bachelor's degree, which account for approximately 65 percent of faculty sampled in this study. The most common degree type in the music industry studies field is the JD which accounts for 27 percent of music industry studies faculty. It may be unique to music industry studies that some job postings specify the JD as a preferred degree.<sup>25</sup> Also, it raises the idea that music industry studies hiring committees and university administrators might prefer candidates with a JD and experience in the field over those with strong academic credentials since a PhD is often perceived as preferable to a JD in other undergraduate programs in fields related to the study of law.<sup>26</sup> The fact that the majority of faculty do not hold a PhD or other research doctorate makes the music industry studies field an exception in academia where typically the PhD, DMA, or MFA, depending on the discipline, is necessary to be considered for a tenure-track position. It may also be that PhD faculty are in the minority because, since most job postings require the candidate to have a number of years' experience in the music industry, ideal candidates tend to be individuals with a JD or master's degree and significant professional experience.<sup>27</sup>

Although the NASM's 2007 report suggested music industry studies faculty were struggling with promotion and tenure based on inadequate educational backgrounds, this study provides some evidence that the issues highlighted by the NASM report are not problematic in 2021.<sup>28</sup> The data in Figure 1 show that music industry studies faculty with all degree types have been successfully meeting their institutions' requirements for tenure and promotion. While the number of faculty members who achieve associate professor appears consistent across all degree types, this study does indicate some potential issues for those with certain degree types as they climb the professorial ranks. This study indicates a decline in the number of full music industry studies professors with a JD or master's degree, but it does not indicate issues with gaining tenure and promotion to the associate professor rank. There is a possibility that non-PhD holders are struggling to reach full professor; this will need to be reviewed over time to see if the disparity continues.

This study did not uncover any strong new trends in hiring. The number of faculty members with a JD remains consistent between assistant and associate professors, which indicates it is a continuing trend. As of the conclusion of this study, there were only a small number of tenured and tenure track faculty members with a master's in music industry as their

terminal degree. This may increase over time, but at this point, the degree is less common among faculty than the JD and MBA as a terminal degree.

Because over 70 percent of the music industry programs listed as MEIEA members are housed in music departments, it would be reasonable to assume that a majority of music industry studies faculty members would hold terminal degrees in music.<sup>29</sup> In fact, only 23 percent have terminal degrees in music or music business (music: 18 percent, music business: 2.5 percent, arts administration: 2.5 percent).<sup>30</sup> While having a terminal degree in music (history, theory, composition, performance, etc.) does not disqualify a music industry studies candidate with the prerequisite professional experience, a large percent of individuals with terminal degrees in music will not likely possess the knowledge and experience needed to teach music business coursework. It may be worthwhile, in a separate study, to look at the music backgrounds of faculty in music industry studies music departments. As music industry studies programs continue to multiply, it will be interesting to see how faculty in disciplines outside of music industry studies and their administrators shape the music industry studies discipline through the hiring practices of different departments and institutions. A potential problem with not having a doctorate-level degree in music industry studies is that there is no agreement upon base line knowledge that faculty members must possess in order to teach and research in the discipline. Further, music industry studies programs are often housed in various departments where what constitutes music industry knowledge could be open to the interpretations of those outside the field, which could have a negative impact on students who rely on these programs to find employment in the music industry. Perhaps there is a need to develop some broad guidelines.

While this paper set out to clarify the educational credentials of music industry studies faculty, it may leave some hiring committee members outside of the discipline scratching their heads and wishing for some kind of roadmap to help them come to a decision concerning which applicants they should interview for a tenure-track position. Most search committees look to academic credentials in the relevant field of study as a predictive measure of future success when hiring new faculty; the music industry studies field is different because there is no one degree type that alone addresses the complexities of the music industry, save the master's in music industry for institutions that consider the master's degree a terminal de-

gree. Job postings often ask for a graduate degree in a field related to the music industry, which is vague and open to interpretation.

When considering academic credentials, the committee should ask the candidates how their education and their experience influence their teaching and scholarship. That explanation could be more predictive of success than a candidate's credentials alone. It may be true that some degree types are better than others in preparing a faculty member to teach a wide range of music industry courses. There is clearly a reason that 27 percent of tenured and tenure-track faculty members who teach in music industry studies programs hold a JD. However, as the data show, music industry studies education is made up of faculty from a wide variety of educational backgrounds who have found success obtaining tenure and promotion at various institutions. As with every faculty hire, the puzzle for music industry hiring committees to solve is to find candidates whose experience, credentials, and interview show they can be successful in the classroom and can meet the rigors of the institution's scholarship requirements. The key for administrators and committee members charged with a music industry studies search is to avoid setting a rigid standard focused on a specific degree and, instead, to be open to candidates outside the departmental norm.

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**DAIN ESTES** has a diverse background as a songwriter, musician, recording artist, and music industry professional. Born in Kansas City, he signed his first record deal at the age of nineteen and went on to release a number of nationally distributed recordings on various independent labels and independently. Estes' songs have been licensed to numerous television shows, films, and commercials. As a touring musician, he has performed throughout the United States and supported a diverse group of artists including the legendary rock act Journey, Gin Blossoms, and Grammy nominee Abra Moore.



After releasing seven albums and ten years of relentless touring, Estes earned his undergraduate degree from the University of Kansas and his Juris Doctor from the University of Missouri-Kansas City. In 2011, he cofounded the Vinefield Agency, an artist management/booking agency based in Denver, Colorado. Estes has spoken at various music industry events, presented at academic conferences, consulted creative businesses on intellectual property issues, and has managed the careers of signed and independent artists. He is Assistant Professor of Music at Millersville University.



## Reviews

**Will Kaufman. *Mapping Woody Guthrie*. Norman, Oklahoma: University of Oklahoma Press, 2019. [www.oupress.com](http://www.oupress.com)**

<https://doi.org/10.25101/21.6>

Whenever the name Woody Guthrie is mentioned, a few things invariably come to mind. The first is almost certainly his most famous song, “This Land is Your Land” with its familiar refrain that spans from “California to the New York Island.” After that immediately recognizable melody and lyric, the image of a dusty, train-hopping hobo—of an archetypical American traveler—looms large in our collective memory of Guthrie. Will Kaufman’s *Mapping Woody Guthrie* charts the path of America’s greatest folk singer as he leaves his Oklahoma home and travels from the Redwood Forest to the Gulf Stream waters and beyond.

The book’s introduction features some keen insight into Guthrie’s affinity for the philosophical ponderings of his intellectual idol Albert Einstein as well as two useful maps. These might invoke cartographic depictions of the Apostolic travels of Saint Paul for some readers with their solid and dotted lines indicating various time periods of travel. The subsequent seven chapters are each centered in a particular geographic location.

Chapter 1 explores Guthrie’s early years beginning with his birth in 1912 in Eastern Oklahoma and highlights the impact that the oil boom and bust of the early twentieth century had upon his sense of the world. Chapter 2 follows his family’s move to Texas after the traumatic death of his older sister and his mother’s mental breakdown. Chapter 3 captures the iconic dust bowl era migration to California that would prove so formative to Guthrie’s songwriting and social consciousness.

Chapter 4 details Guthrie’s time in the Pacific Northwest working as a sort of artist-in-residence for the Bonneville Power Administration during construction of the Grand Coulee Dam. Chapter 5 chronicles a lesser-known era of Guthrie’s life during World War II. His several voyages with the Merchant Marines found Guthrie on the shores of Mediterranean Africa, continental Europe, and the United Kingdom.

Chapter 6 has the difficult task of conveying Guthrie’s complex habitation history in New York City. This chapter arguably might have been better situated after the chapter on California from a biographical chronol-

ogy standpoint, but there really was no perfect solution to the problem of its placement. From the time Guthrie first set foot in New York in early 1940 he would flow in and out of its boroughs with as much volatility as the Atlantic tides. Chapter 7 covers one last major period of exodus in Beluthahatchee, Florida before Guthrie's slow succumbing to Huntington's chorea hospitalized him back up north until his death in 1967.

In his conclusion, Kaufman reiterates the central thesis of the work: the importance that historical time and geographic place played in Guthrie's career. Utilizing geography as an organizing principle in biographical work on Guthrie is particularly appropriate for a figure as well-traveled as he was. It is also especially illuminating as it helps us to understand Guthrie's complex association with American music and our memory of him as a patriotic symbol.

*Mapping Woody Guthrie* is an excellent contribution to the literature on the man himself, and more broadly to the history of American folk and popular music. Readers who share Kaufman's special interest in the relationship between popular music and progressive, left-wing politics will be especially pleased with the work's tone. Yet, even for scholars working in a completely different area, the geographic methodology used in the book may be inspirational. Reinforcing the centrality of time and place helps the book to transcend some of the limitations of biography and inherently place its subject within historical context. Such a structural choice helps to communicate Guthrie's importance and influence upon American music and culture.



**JASON LEE GUTHRIE** is an Assistant Professor of Communication and Media Studies at Clayton State University in Atlanta, Georgia. Guthrie is a media historian interested in the intersections of creativity and economics, with specific interests in the creative industries and intellectual property law.

**Peter Tschmuck. *The Economics of Music* (Second Edition).  
Newcastle: Agenda Publishing, 2021. [agendapub.com](http://agendapub.com)**

<https://doi.org/10.25101/21.7>

Peter Tschmuck, Professor for Cultural Institutions Studies at the University of Music and Performing Arts Vienna and editor of the *International Journal of Music Business Research*, has released a second edition of his book *The Economics of Music*, which sheds light on how economic forces shape the music industry today. In other words, his book examines the music industry from an economics perspective.

This book is an innovative and rigorous examination of the music economy in general, highlighting a great integration of microeconomic theories and up-to-date empirical music data. A key contribution of this book is an exploration, from an economics perspective, of the impact of digitalization on the music industry during its transition from a physical to a digital world. Or, in the author's own words, "By explaining the economic rules driving the digital music business today, this book aims to fill this gap." Compared to its first edition, published in 2017, the second edition further examines the effects of digitalization on the music industry since then, including developments such as streaming platforms and download services. Besides examining the detailed structures of the core sectors of the music industry—music publishing, sound recording, and the live music market, along with their interdependent relationships, it further analyzes the impact of the COVID-19 pandemic on them, as well as its shock to the secondary markets and music labor markets.

The book is well-structured by starting with an overview of the economic history of the music business. It makes readers aware of the differences between the framework of the music industry and music economy. The former includes three closely linked sectors: the recording industry, music publishing, and the live music sector; while the latter further incorporates the secondary music markets, music education, music advocacy/lobbying groups, and music funding. This is followed by an extensive application of microeconomic theories in "Microeconomics of Music: Music as an Economic Good" (chapter 2) and "Economics of Music Copyright" (chapter 3). For college students who are taking introduction-level microeconomics, both chapters are beneficial for deepening the understanding of microeconomic theories in the context of music industry, which is expected to be more systematic and interesting than those diverse examples

in a standard textbook. Specifically, chapter 2 starts by introducing the fundamentals of economics such as demand and supply, market mechanism, and price elasticities, and then uses examples from the music industry such as a concert of a famous band and hard core fans of the band to illustrate the theories. However, there are some minor issues that deserve attention: the difference between scarcity and shortage should be distinguished when applying the demand and supply model. Additionally, the formula for income elasticity of demand, along with its sign, should be reviewed.

Chapter 2 is creative in considering different types of music as economic goods. It covers all the basic categories of goods, ranging from a public good, a merit good, a club good, and common good. A typology of music as an economic good (Figure 2.8 on page 56) is extremely helpful for people trying to understand the four basic types of goods based on their rivalry and excludability in consumption.

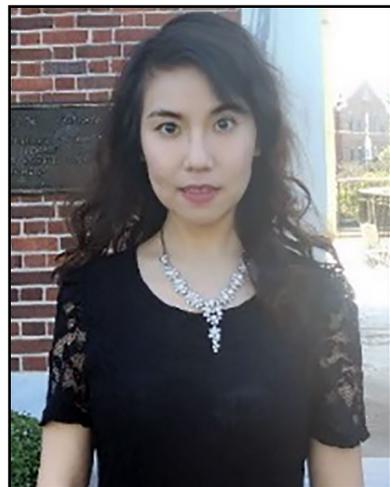
Equally as creative as chapter 2, chapter 3 connects music copyright to the music markets that are of different market structures (monopoly, monopolistic competition, and oligopoly). It not only explains the importance of copyright in music industry, but also suggests the optimal length of copyright protection.

The next three chapters provide very detailed introductions to three core sectors of the music industry (music publishing, sound recording, and live music) and analyze their interdependent relationship especially in terms of copyright and digitalization. Digitalization hit the recording industry much more severely than it impacted music publishing. Besides discussing their respective market and industry structures throughout the three chapters, examples are provided from the most popular music companies and extensive empirical data are presented to inform readers. Compared to the first edition, the three chapters further analyze, from the limited amount of data available, the impact of the COVID-19 pandemic on the three core sectors of the music industry and its main players. The data suggest some interesting facts, such as, “The COVID-19 pandemic will have not have any disruptive impact on the music publishing market... The thriving music streaming market compensates for losses in other publishing segments” (87). Although it is too early to assess the overall impact of COVID-19 on the live music sector (at the time of writing this second edition at the end of 2020), it is clear that the pandemic has had a devastating impact on it.

The last three chapters discuss the relatively minor topics of “Secondary Music Markets,” “Music Labor Markets,” and “Economics of the Digital Music Business,” which greatly enrich the previous core chapters. In particular, the chapter on music labor markets presents the readers with artistic labor market theories that are based on the basic demand and supply model. Tschmuck also analyzes the revenue streams for musicians, which suggests the excess supply problem.

This very informative book is perfect for an overview of the music business. It targets readers with a business background. Readers will benefit from this relatively easy-to-understand yet erudite exploration of the music industry. It could also be used in higher education institutions as a reference book for courses such as Music Economics, Music and Cultural Entrepreneurship, and Cultural Economics. Those courses could be either required or elective courses in the major/minor programs in the art, music, economics, and business departments, along with inclusion in the general education curriculum. In addition, this book would further promote collaboration among departments and programs at any higher education institution which contributes to the new interdisciplinary course offerings such as Economics of the Music Industry. Students using this book will realize that economics lies at the heart of the music business and understand that the economics of the music industry can shed light on how our daily life and decision-making are affected by economic forces.

**YING ZHEN** is an Associate Professor of Business and Economics at Wesleyan College in Macon, Georgia, where she serves as the Economics Program Director. Her major fields of specialization are labor economics, cultural economics, and industrial organization. Specific research interests include music business and economics of immigration. As a member of the Music Industry Research Association (MIRA), she collaborated with Professor Alan B. Krueger of Princeton University (founder of MIRA and the



former chairman of the Council of Economic Advisors under President Obama) on the “Survey of Well-being of Musicians in the United States from December 2017-June 2018.” Some key results have been cited six times in Krueger’s book *Rockonomics: A Backstage Tour of What the Music Industry Can Teach Us about Economics and Life*, which was published in June 2019, three months after his March 2019 death.

She considers economics a universal science, which should be open to everyone. Her ultimate goal is to help students see the world through the eyes of an economist, helping them to appreciate the beauty of economics and to become civilized world citizens.

**Ari Herstand. *How to Make It in the New Music Business: Practical Tips on Building a Loyal Following and Making a Living as a Musician* (Second Edition). New York: Liveright Publishing Company, 2019. [wwnorton.com/liveright](http://wwnorton.com/liveright)**

<https://doi.org/10.25101/21.8>

There is no shortage of books purporting to be “the definitive guide to attaining success in the music business.” If the alleged Hunter S. Thompson quote about the music industry is true, the music self-help/education business might be even worse. The problem with so many of these books is that they’re written by pure academics, consultants, journalists, or lawyers. Very few authors truly understand what it’s like to hustle every day as an artist. Even fewer employ solid pedagogical methods that scaffold knowledge in a way that efficaciously educates. Enter Ari Herstand.

Herstand has been a full-time indie musician since 2008, playing with artists such as Milk Carton Kids, Phil Vassar, Matthew Nathanson, and Ron Pope. As a musician, he has played over seven hundred shows and launched the highly-successful “UnCancelled Music Festival” which virtually showcased over 350 artists to a worldwide platform during the coronavirus pandemic. In 2012, he started the music business blog *Ari’s Take*, which eventually blossomed into a full-blown online education

company. His articles are frequently featured on powerhouse sites such as *Hypebot*, *CD Baby*, *American Songwriter*, and *Roland*.

*How to Make It in the New Music Business* could be considered Herstand's educational magnum opus. Originally released in December 2016, the book was subsequently updated with a second edition released in November 2019 (this review focuses on that edition). Since its release, it has been hailed by indie musicians, music magazines, websites, podcasts, and blogs alike. At the time of this writing, it is listed on Amazon's top three bestselling books on the music industry (it's hard to surpass Donald Passman on any list!).

The book is divided into sixteen unique chapters that build off one another in succession. Starting with a brief overview of the "new" music industry (again, not from the perspective of an executive, but an independent musician), the author launches into a series of "how-to"s for building a platform in today's marketplace. Quickly dispelling the mythic romanticism of pursuing a career in music, Herstand makes it clear: no one *just* makes music for a living. He gives practical advice on how to effectively parse out work hours, who you need to have on your team (and when), how to effectively utilize analytics to understand and grow your fan base, and what the industry looks for when signing talent.

While each of these subjects deserves books written about them in their own right, the author does a good job of cutting through the noise and allowing readers to dip their toes into worlds which may not have been explored previously. Herstand continues with this brief, but effective approach for subject matters including the recording process, digital distribution, local hotspots (he does a fantastic job of summarizing music scenes in cities like Los Angeles, Nashville, New York, and London), booking shows, sponsorships and crowdfunding, royalties, sync licensing, and the media. The bottom line here is that Herstand does an expert job of steering the reader away from fantasy revenue streams (CD sales and streaming royalties), and instead towards the real-world potential of tried-and-true methods, combined with the new technological tools available to anyone with an internet connection and a touring vehicle. He clearly understands the grind of being an independent musician, and focuses all of the book's pages on relevant, practical matters for aspiring artists and ensembles.

If there are potential shortcomings for someone reading this text, it would be in making the assumption that this book is, in fact, the end-

all-be-all of a music business education. As any veteran student of the industry knows, the business tends to be incredibly complicated, and true understanding requires time, experience, and a multitude of educational resources. Furthermore, the synergistic relationship between music and tech is ever evolving, and as such, any book has the tendency to be outdated by the time of publication. In this manner, no textbook could ever fully illuminate the potential and pitfalls of “how to make it in the new music business.” Fortunately, while the title may be more effective marketing than truth, Herstand does a great job of communicating this in the text and frequently gives solid resources for artists to stay up-to-date on the latest trends and developments in the music business.

While I’m not sure this text would be effective for an entire course on the music industry, I think it would be great as part of a program focused on educating artists. I could easily see myself listing this book as required reading on a senior project or internship syllabus. The nuggets of wisdom that are shared would make for great highlights of a more robust music business education and as such, I feel I can wholeheartedly recommend this book to any aspiring artist or colleague within the industry. Ari Herstand is someone who undoubtedly will become more and more of a household name as a trusted source for artists in the months and years to come.



**Steven Potaczek** is an artist, music producer, and educator who is focused on helping tomorrow’s musicians and music industry leaders discover and live out their potential as creative careerists. He has worked with some of the top artists in the industry, cowritten songs that charted on *Billboard’s* Top 40, received numerous industry accolades, composed for television shows such as *Parks and Rec*, *New Girl*, and *CBS Evening News*, and

has successfully collaborated with organizations such as MTV, National Geographic, and the Heartland Film Festival. He is a regular speaker at various music industry events around the United States and is currently an Assistant Professor and Director of Commercial Music studies at Samford University in Birmingham, Alabama.

**Kamal Moo. *The Straightforward Guide to the Music Biz: An Entertainment Lawyer Breaks Down the Industry*. Rocksteady Media, LLC, 2020.**

<https://doi.org/10.25101/21.9>

This book is appropriately titled—it is indeed straightforward. It does a very good job of touching on lots of topics and explaining them plainly and simply. The author is very knowledgeable about many areas of the music industry and succeeds in accurately describing complex topics in easy-to-understand language. Although I did not check every explanation found in the book for accuracy, a deliberate read of the book cover to cover left me confident that the information contained is reliable, which is often not the case with short and relatively simple books on the music industry. The book is divided into eight substantive sections with a “Final Thoughts” section at the end. The coverage is broad, including copyright law; songwriting; band/group matters; record deals; starting an indie label; record production; touring; and the role of agents, managers, and attorneys. Each section explains the important business and legal aspects to consider in each segment of the industry, all within eighty-two pages. It is available as an ebook and in paperback, priced from US\$9.99 to \$14.99.

Different college students and up-and-coming artists, songwriters, and professionals need tools that are best suited for their style of learning. For some, the well-established books that we professors all know and love may explain topics in too much detail, be too lengthy, or too expensive to meet the needs of someone who is looking for a short answer to a question. This book provides the short answer with just enough explanation to be helpful. With its relatively short length, and low price point, this book meets a specific need. I could easily see it being used in workshops for up-and-coming industry creative and business types who are not yet able or willing to invest much money in educational resources. I could also see it on a reading list for incoming college students before they start taking courses, readily available on a table in a recording studio lobby, in a high school guidance counselor’s office or music classroom, in a community outreach career center, or in a bag of swag given to aspiring songwriters or artists attending a conference. Overall, this book is a valuable resource about the music industry, both accurate and simple in its style, and easily accessible due to its length and price.

**SERONA ELTON** has extensive experience as a music industry professional and educator. She is a professor, Director of the Music Industry Program, and Associate Dean of Administration at the University of Miami Frost School of Music. She is also a Yamaha Master Educator and serves as Head of Educational Partnerships for The Mechanical Licensing Collective (The MLC). Previously, Elton worked for Warner Music Group where she held the position of Vice President, Product Management, and for EMI Recorded Music, North America, where she was Vice President, Mechanical Licensing and Repertoire Data Services. She has also provided consulting services to Sony Music Entertainment, Universal Music Group, Zumba Fitness, and other music-related companies. A respected expert, Elton has written numerous articles about the music industry and directed several industry conferences. Additionally, the Leadership Music alumnus has provided expert commentary for *Billboard* and *CNN.com* and has made multiple appearances on *NPR's Marketplace*. Elton is very active in numerous music industry organizations and has served as President of the Music and Entertainment Industry Educators Association (MEIEA), Chair of the Florida Bar Entertainment, Arts, and Sports Law section, a member of the Recording Academy Board of Governors for the Florida Chapter, and a Trustee of the Copyright Society of the USA. Elton holds a BSBA in Finance from the University of Florida, an MM in Music Media and Industry from the University of Miami, and a JD from Brooklyn Law School. She is a member of the New York Bar and Florida Bar.

