The Representation of Major and Independent Record Labels in National Trade Media

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Introduction

The portrayal of majorities and minorities by the media impacts people's attitudes and opinions, and has been a central theme of social psychology and mass media inquiry (De Dreu & De Vries, 2002; Severin & Tankard, 2001). When a category or group is mentioned in the media, the words and phrases used to describe that group instruct people how to think about the organization, either in direct or indirect terms (Donohue, 1997). In short, "The media [influence] attitudes… by siphoning and selecting the information we receive to make choices about our day-to-day realities" (Mahatini, 2001, p. 99).

The level of social influence of majorities and minorities is affected by their media exposure (Clark & Mass, 1980; Mackie, 1987; Martin, 2002; Nemeth & Wachtler, 1979). The media's reporting of various groups, record labels in this research, affect the perception people have of those labels. When the activities of minority groups are over reported, it may appear as if they have more influence than in actuality. The inverse is also true of majorities. If public opinion is related to media portrayal, then the way media portray major and independent record labels results in a distorted view of the marketplace.

Research shows the importance of studying media relations to minority and majority groups, in any sense, because the media play a crucial role in the creation of social identities (Henry, 1999). The media are an important source of information through which individuals gain knowledge about their world, and attitudes and beliefs are shaped by what media discern as public knowledge.

This research examines the representation of major (majority) and independent (minority) record labels in music industry trade media. Trade media, usually in the form of magazines and newspapers, are consumed by professionals in the industry those media cover, are usually more information-oriented and less entertainment-oriented (Baumgarten, 1975; Summers, 1970), and are usually considered the most influential on opinion leaders, early adopters, and taste makers, those whose opinions carry the greatest amount of influence in their respective industry. Frequency of the use of "major" and variations of "independent" are examined, as well as use of the names of the major and independent labels. The findings of this research suggest that while there may exist a level of media influence over attitudes and perceptions, these links are not pervasive throughout media portrayal of these businesses, and the reality and perception of the prerecorded music industry is usually accurately portrayed by media reports.

Majority and Minority Relationships in the Recorded Music Industry

The recorded music industry is typically divided into two segments: major and independent (a.k.a. indie). All record labels fall within one of those two broad categories. The dividing line in the contemporary recorded music industry is defined not only in terms of corporate and economic size but also degree of control they possess over their operations (Burnett, 1996). Major labels are typically considered "conservative companies" built around strict rules and sales potential, with the ability to sign more artists and spend more money on marketing and promotion than independents (Baskerville, 2006, pp. 304-305). Burnett (1996) defines major labels as those who are part of "vertically integrated multinationals" (pp. 49), combining aspects of content production and methods of distribution, while independent labels do not typically control their delivery chains.

Small businesses, such as most independent record labels, play a significant role in the music industry, despite the minority share of the market they control. Christman (2006) reports that in 2005, major record labels controlled, rounded to the nearest tenth of a percent, a total of 86.9% of the total prerecorded music market (with Universal Music Group capturing 31.7%, Sony BMG Music Sales Enterprise taking 27.5%, Warner Music Group taking 17.3%, and EMI Music controlling 10.4%), leaving 13.2% (totals to not add up to 100% due to rounding) of the prerecorded music market for independent distributors.

Although many people may not see the music business as an incredibly entrepreneurial environment, the industry has historically been rich in “opportunistic, risk-taking, and pro-active” endeavors (Wacholtz, Edwards, & Thompson, 1999, para. 1), words usually reserved for entrepreneurial and small-business ventures. Indeed, it has been said that small business is the lifeblood of the music industry, being “essential for nurturing talent at the lowest possible level, where sometimes just a few thousand sales can see a project break even” as well as providing the breeding ground for the next generation of big businesses (Talbot, 2004, p. 14).

The relationship between majors and indies has been well documented (Bleakley, 2005; Burnett, 1996; Matens, 2005a; Martens, 2005b; Martens & Christman, 2006; Waller, 2003) as a symbiotic relationship where major record label companies feed off of indies but the independent labels also use the market leverage of the major labels for their own gain. Independent labels are described as more creative and democratic than major labels (Hesmondhalgh, 1998; Mabry, 1990), serving as “bastions for diversity and natural homes for niche genres” (Legrand, 2005, p. 32), and representing the market segment where musical trends begin. Major labels, on the other hand, are usually thought of as more business-driven, where musical trends are co-opted and exploited for commercial gain, and will only sign acts when the risk of failure is minimized (Papadopolus, 2004).

It has also been suggested that the dynamic between majors and indies changes with changes in the economy (Legrand, 2005, p.32-33). Speaking of the devastating impact major label consolidation and restructuring on label Artist and Repertoire, Legrand's article quotes European indie label group Impala's Chairman Michel Lambot, stating:

> There's less signings, and majors also hand back a lot of recording contracts. Artists and their management are feeling quite uneasy with the whole process and are looking at indies with different eyes. They know they can achieve substantial sales with indies. (p. 32)

The viewpoint indie labels take is that they are able to survive and compete "in various niches, such as hip-hop or children's music, where majors don't dominate as much" (Waller, 2003, p. 15). Additionally, Lesley Bleakley, Vice President of Beggars Group, an independent label group, thinks "it's a different feeling for an artist to be on an independent label now than it was when I first came to America seven years ago…because we do practice artist development, and we do give artists more control" (Waller, 2003, p.15).

The relationship between majors and indies is give and take. Independents do what they must to survive, working with or against the structure of the music industry. Legrand (2005), states "first in the United Kingdom and France, and now across the continent, Europe's indies are taking collective action in dealing with such major challenges as access to retail markets, media exposure and digital development" (p. 34).

If independent labels are unable to successfully compete against major labels in the marketplace, they find ways to cooperate with the major-controlled structure. Prior to the downturn in the music industry economy, “the majors felt they were competing with the indies. Now [independent record labels are] becoming their sole method of artist development…if the little labels are so good at finding and selling music on their own, why do they need the big guys? For leverage with broadcasters and retailers” (Kafka, 2004, p. 41).

The analysis of this research is structured around several main theoretical issues, taken from the analysis of the available literature that are of importance with respect to the representation of major and independent record labels and the effect of that representation on the public’s opinion of the prerecorded music industry.

1). How frequently are the labels’ names mentioned and how frequently are the tags “major” and “independent” (and variations thereof) used in popular trade media?

This is of primary importance in this study, as repetition and persuasion are linked (Cacioppo & Petty, 1979), but these elements have not been previously examined in a prerecorded music industry context. Independent record labels have recently constituted approximately 16% to 19% of the recorded music market: 18.6% as of May 2005 (Market Watch, 2005), 17.4% in 2004 (Christman, 2005), 16.7% in 2003 (Christman, 2004), 16.4% in 2002 (Christman, 2003) 16.7% in 2001 (Christman, 2002), and 16.6% in the year 2000 (Christman, 2001). It follows that the majority of the media focus would be on major record labels (approximately 85%), and any imbalance would represent a skewed media representation of the marketplace. This skewed media representation would alter the perceptions of individuals who rely on those media sources for an accurate, business impacting, representation of the music industry.

An additional question in this research regards the terms used to describe the attributes of major and independent record labels.

2). Do the media portray major and independent record labels using the same set of descriptions each time a record label is depicted?

Traditionally, independent record labels are described as the locus of creativity (Wacholz, 1999), democratic (Burnett, 1996) and decisive, while major record labels are thought of as more business-oriented (Talbot, 2004). Media depictions (“good” or “bad,” “large” or “small,” as examples) of businesses affect the perceived influence of those entities (Moscovici, 1976) as well.

The Influence of Media on Tastemaker Opinion

The idea that media influence opinions and attitudes is nothing new. Even before World War II, media theorist Walter Lippmann (1922) suggested that people respond to the “pictures” in the heads by relating a story where the English, French, and German inhabitants of an island operated under the idea that all three nationalities were at peace with each other when in fact World War I had made Germany enemies of France and England for over a month, due to the fact that they only received news from the mainland via steamboat once every six weeks. Over twenty-five years ago, McCombs and Shaw (1972) generated the original agenda-setting hypothesis by finding correlations between media messages and audience interests in relation to the political process. In that study, they found that “the media are the major primary sources of national political information; for most, mass media provide the best – and only – easily available approximation of ever-changing political realities” (McCombs & Shaw, 1972, p. 185).

This model explains the correspondence between the rate at which the media cover a topic and the amount of importance people attach to that topic. The media may not tell the public what to think, but they are able to influence what the public think about. Furthermore, research by Behr and Iyengar (1985) suggested that television news coverage not only affected public agenda, but that it was also unidirectional. These concepts are important for this study since they indicate that the media influence public thought and discourse, but the public concerns do not necessarily direct media coverage.

McCombs and Evatt (1995) have given support for a second-level agenda-setting theory that goes beyond the basic definition of agenda-setting that includes the media's ability to tell the public *how* to think about certain objects. Research by Ghanem (1997) has identified how the use of frames (how the media tell a story and what is emphasized) and subtopics (categorizing the attributes of an issue) by media outlets shape the public's thoughts and opinions. Essentially, the media have the ability to use subtopics and frames to influence the attitude, agenda, and perception of the public who trust the media to provide accurate, unbiased portrayals of reality. When framing news stories, the inclusion or exclusion of ideas and simplification or elaboration of connected issues influences consumer perception (Shah, Domke, & Wackman, 1996). Entmann (1993) also suggested that media frames can be used to call attention to certain elements while leaving other elements out, and that "the way a problem is framed might determine how people understand and evaluate the issue" (p. 52).

For this research, the attributes of major and independent labels are examined in an agenda-setting context. The subtopics dimension categorizes the attributes of an issue (Ghanem, 1997). As an example, Brosius and Eps (1997) in their exploration of media reporting on attacks against foreigners and asylum seekers in Germany and discovered subtopics including foreigners, political action, assaults, and trials. This research examines the traditionally-conferred attributes and descriptions of major and independent record labels in actual correlation to the descriptions of major and independent record labels in music industry trade media.

Methods

Sample

The music industry trade magazine *Billboard* will be examined here. *Billboard Magazine* is seen as the primary source of information for music industry professionals and trendsetters, read in more than 100 countries and attracting more than 2.5 million unique visitors to its online component, Billboard.com, every month (Nielson Business Media, n.d., para. 10). For these reasons, Billboard magazine is the medium examined.

The sample consists of articles from *Billboard Magazine* over a period of five years (2001 through 2005). The sample covers a specific trade medium that is available via online databases (here, EBSCO MegaFILE). Billboard magazine boasts a total readership of over 104,000 people each week (Billboard Magazine, 2008), with many industry executives and opinion leaders among those subscribers. The volume of articles over the specified time renders a representative sample of influential industry trade media. Also, trade media are useful in this research in order to render a representative sample of how sources outside the businesses studied represent the businesses, as opposed to publicity press, which would be influenced by forces inside the respective business covered. A total of 745 articles and headlines were coded in total. This research defines *coding unit* (the basic unit of text classified) as every article and headline with *record* or *label* as the subject term *or* 51221 or 51222 as the NAICS code or description, with 51221 and 51222 representing the NAICS codes for companies engaged in record production or integrated record production and distribution. The analysis is limited to those articles and headlines in order to have a more precise analysis of stories that feature prerecorded music companies.

Coding Schedule. In order to answer the above research questions, the variables must be coded in order to measure their frequency (Weber, 1990). In creating category definitions, two basic decisions were made (Krippendorf, 1980): First, the categories should be mutually exclusive, so that coding units with similar meaning are classified into each category, but not into more than one category. Second, a decision should be made on how narrow or broad the categories should be. The schedule used was designed to examine the research objectives.

Source Status. Major and independent representation in *Billboard* was measured using two different variables. The first concerns the use of record label names, counting each name as either a reference to a major label or independent label as defined by the Music Industry Sourcebook from 2000 to 2005. The second variable counted was the frequency in which the status “major,” “independent,” and “indie” were used. All label names and statuses counted were reviewed to ensure appropriate context.

Source Descriptions. The descriptions were measured by examining the terms that accompanied (within 100 character spaces) the words “major,” ”independent,” or “indie” in the headline or body of the articles. As defined earlier in the research, the descriptions were placed into one of two categories; a) business related descriptions that identify the label as being more business-focused, ex. “On Sept. 23 Arista Records will be the first

BMG-owned label in the U.S. to release a commercial CD with copy-management technology (Garrity, 2003, p. 10) or b) creative descriptions that refer to the innovative aspects of the record label, "…if he can maintain creative autonomy. Meanwhile, pursuing a fully independent path in the U.K. is Mike Stock" (Sexton, 2003, p. 7). For each category, synonyms for the terms defined earlier in the research were assembled using Roget's New Millennium Thesaurus.

Results

Major and Independent Representation Status

After all headlines and body text were coded and all names and statuses for all independent and major labels were counted, results differed when counting all references compared to just counting the statuses. Out of all 745 articles and headlines, 7,588 names and descriptions of independent and major labels were used. Out of those 7,588 names and descriptions found, 84.2% were used in conjunction with major record labels (n = 6,390), while only 15.8% were used to name and describe independent record labels (n = 1,198). These results are only a half a percentage point different than the market share held by these two opposing sections of the record industry during this time, with major labels controlling an average of 84.7% of the market share from 2001 through 2005 and indies controlling 15.3% in the same time period.

However, when counting only label status ("indie," "independent," and "major") a different outcome appears. Out of the 1,248 occurrences of descriptions, major record labels account for only 42.3% of the descriptions (n = 529) and independents account for 57.6% of occurrences (n = 719), dissimilar from the market share over the same period.

Major and Independent Descriptions

The distribution of the source descriptions that accompany major and independent label representation is shown in Table 1. The descriptions that accompanied the major label representations were primarily business and commercial synonyms (29% and 26% of all descriptions counted, respectively). In contrast, the descriptions that accompany independent record labels referred primarily to business and originality synonyms (33% and 19%, respectively).

Regarding source descriptions considered indie-centric and descriptions considered major-centric, 287 descriptions were found describing independent labels that are also considered indie descriptors, e.g. “Artemis Records' recent move to Koch Distribution appears to have given the 4-year-old independent label a *new* lease on life” (Christman, 2003, p. 5), compared to the 1,376 similar descriptions used for major record labels. Thus, compared to the total number of words found in the vicinity of major and independent representation in the articles (n = 105,400 and n = 19,874, respectively), independent record labels were described as more creative and original (“indie-like”) compared to major record labels.

Additionally, major-label descriptions accounted for 367 words counted as independent-label depictions, compared to 1,813 similar descriptive words used for major record labels. Words used to traditionally describe major record labels were counted more often in relation to independent record labels (1.8466% of all words counted) than in relation to major record labels (1.7343%).

A closer examination of the independent descriptions shows that indie labels are described using those independent descriptions in every case examined except for the adjective and synonym “original” ($c^2(5) = 32.56$, $p<0.0005$). The adjectives and synonyms for "creative" (0.4478% for indies compared to 0.3672% for major labels), "democratic" (0.2466% for indies compared to 0.1575% for majors), "organic" (0.0151% for indies compared to 0.000009% for major labels), "diverse" (0.0704% for indie labels compared to 0.0313% for major labels), and "niche" (0.0302% for indie labels compared to 0.00006% for major labels) all accounted for a higher portion of independent-label adjectives than major-label adjectives. "Original" and related synonyms accounted for 0.7429% of the major-label adjectives compared to only 0.6340% of all independent descriptions for indie labels.

Major label descriptions are more uniformly distributed (c^2 (4) = 20.62, p<0.001). The descriptions "conservative" (0.0201% for indie labels compared to 0.0199% for major labels), "bureaucratic" 0.0957% for indie labels compared to 0.0512% for major labels), and "business" (1.0768% for indie labels compared to 0.8425% for major labels) are used more often to describe independent record labels than major record labels. Alternatively, the descriptions and synonyms for "commercial" (0.6038% for indie labels compared to 0.7524% for major labels), "conventional" (0.0503% for indie labels compared to 0.0683% for major labels), and the word "bureaucratic" and related synonyms excluding "network" (0.0352% for indie labels compared to 0.0370% for major labels) are used more often to describe major labels than indie labels.

Discussion

This research unfolds some of the complexities that surround the relationship between the media, public opinion and discourse, and reality. After analyzing the content of a major industry trade magazine, several points of interest surface regarding this research: First, major record labels are likely to be represented more often than indie labels when label names and terms “independent,” “indie,” and “major” are used (84.2% major to 15.8% independent). This is important on several levels. This shows that *Billboard* does report independent record labels as separate and distinct entities in their frequency from major record labels. Also, these results are consistent with the market share held by these two groups in the same time period, suggesting that *Billboard* Magazine reflects the marketplace about which it reports. This could be for several reasons not examined in this research. As a market-driven media organization, *Billboard* Magazine needs to orient itself to serve the majority of the population (major record labels). An additional explanation could be that *Billboard* as a news organization naturally reflects the market it services with no preoccupation of market orientation.

The second major finding concerns the representation of independent and major record labels when only the status “independent,” “indie,” and “major” (and plural forms) are used. Over half of these words (57.6%) used in news articles are used to represent independent record labels. This result is far different from the use of proper names and statuses. This drastic difference in results indicates that while proper names are used far more often to represent a record label (83.6%), independent record labels are seven times more likely to be represented with a basic “independent” or “indie” status. This suggests that media may treat independent record labels in a much more general, vague way than major record labels. When major record label issues are discussed, it is in the context of specific labels and names (e.g., EMI, Capitol, Atlantic). Similar trends in minority and majority news coverage have been found in different types of media in different contexts (Taylor, 2006), including sports coverage (Fullerton, 2006) and New Zealand print media

(Loto, 2006). While the hegemonic viewpoint is spoken of in direct, specific terms, the minority perspective is less detailed and covered in more broad, indistinct ways.

Third, concerning the descriptions that accompany the major-independent distinction, words typically used to describe independent record label qualities are used in *Billboard* Magazine to describe indie labels more often than major labels. Independent record labels are described using terms “creative,” “democratic,” organic,” “diverse,” and “niche” more often than major record labels. The only indie-like word found more frequently in conjunction with major labels than independent labels is “original.” This shows that *Billboard* generally supports the commonly-held views of independent record labels as entities where artists are freer to experiment and have more voice than major record labels.

However, the research also found that *Billboard* also uses several terms usually associated with major labels in independent-label contexts as well. The words and synonyms for “conservative,” “bureaucratic,” and “business” were all found more often in the context of independent record labels than major record labels. Closer examination of the data reveals several important caveats, however. The “conservative” adjective was used only slightly more in independent-label descriptions than major-label descriptions, by a margin of 0.0002% and meets the exact expected values in the chi-square test. That indicates that while, statistically, the word was used more in independent-label descriptions, that use is negligible.

In regards to the use of “bureaucratic” in describing record labels, all synonyms for “bureaucratic” are found more in indie-label descriptions compared to major-label descriptions. However, out of all the synonyms for “bureaucratic” found, the word "network" accounted for 28% of the major-label count and 58% of indie-label synonyms. While the word "network" *is* a synonym for "bureaucratic," networks and networking play a very large part in indie-label success. A specific example concerns the MIDEM conference, an international music industry conference held yearly in Cannes, France (Amicone, 2002, p. 41).

> As someone who has held top positions at both indies and majors, [Bob] Frank is in a unique position to gauge MIDEM's importance. 'I think it's more important for an independent to be there than it is for anybody else,' he says. 'I don't think a lot of majors have a presence whatsoever….They don't have the ability to piecemeal together a global network like we [independent record labels] do.'

In this context, removing the word "network" from the list of synonyms for "bureaucratic" gives us a perhaps truer picture. Without the word "network" included, the word and synonyms for "bureaucratic" are used more in conjunction with major record labels than independent record labels (0.0370% and 0.0352%, respectively).

Finally, the synonyms "commercial" and "conventional" are used more frequently to describe major record labels compared to independent record labels. Analyses of the synonyms for "commercial" indicate that the most frequently-used synonyms coded were "market" (68% of "commercial" synonyms) and "sale" (25% of "commercial" synonyms). This suggests that major-label commercial endeavors *Billboard* reports on are largely market-oriented and concerned with product sales. The most frequently-found synonyms for "conventional" were "expected" (43% of "conventional" synonyms) and "mainstream" (22% of "conventional" synonyms). Additionally, more synonyms were found to describe major record labels as “conventional” (9 out of 23 counted) than independent record labels (4 out of 23). Not only does *Billboard* frame major record labels as more conventional, but they also use a wider array of vocabulary to describe the conventionality of major record labels.

One of the implications of these findings is that they indicate the types of descriptions used to represent major and independent record labels in the media and, provide direction for future research into media framing in the recorded music industry. Further investigation into the subject should focus not only what kinds of descriptive terms are used to define these businesses, but also what impact these descriptions have on the public’s and opinion leaders’ collective psyche. Additionally, the nature and categorization of the topics should increase the validity of the research topic. Longitudinal analysis of the subject matter would further help define the nature of the issue and provide a greater understanding of the interactions between the marketplace and the representative media.

This research indicates how the majority and minority positions in recorded music are reflected in the media. Notable is that major and independent record labels, as two separate groups, are reported on in almost direct correlation to their market share, when proper names and statuses are used. Relating this to the second-level agenda setting theory, people that read *Billboard* Magazine over the time period examined consumed media that reflected the market. Over time, people may come to expect that they will be presented with media that is balanced with the market share, and this expectation may lead to a viewpoint that is skewed compared to the actual market share if *Billboard* makes changes in their reporting of major and independent record labels.

Additionally, if media consumers are affected by what they consume, *Billboard* Magazine does have an effect on they way people view independent record labels and major record labels in general. With the more general status used to report on independent record label issues, media consumers may relate this to the market in a similar manner, generalizing indie labels while maintaining distinctiveness among major record labels. If the media can not only tell people what to think about but also *how* to think about it, then the generalizing of independent record label issues may lead to a greater trend in the marketplace as well.

The media may also impact consumers' viewpoints on major and independent record labels. As illustrated in the data, *Billboard* describes indie record labels in traditional independent record label terms and major record labels in several common traditional major label terms as well. Ultimately, this agenda-setting control the media have may serve to keep the status quo in the recorded music industry by keeping the minds of the consumers focused on traditional independent/major label issues. Whereas major record labels may have sought to strive for originality and uniqueness in the marketplace in the time period examined, *Billboard's* representing of major record labels may have continued to keep the mindset of the reader oriented on traditional major-record-label values. Conversely, independent record labels may have to become more commercial and conventional in their operations, *Billboard's* reporting tactics may have directed the public to focus on the standard unconventional assessments that independent record labels have acquired. Therefore, one needs to be aware of circumstances where there are inconsistencies between what is reported and what the values of the actors in the marketplace are in favor of unsurprising reporting.

This content analysis of the representation of independent and major record labels illustrates how the media may influence not only what subjects people think about but how to think about those subjects. If the second-level agenda setting theory holds true, then public opinion and perspective are persuaded by how the media portray their subjects. That portrayal, if inaccurate, leads to an inaccurate public perception of the subjects as well. While *Billboard* Magazine may report on major and independent record labels in close proximity to their total market share, their portrayal of major and independent record labels may provide fuel for people's perceptions and misperceptions of how these companies conduct their business. By studying how different sources of social influence act in their natural environments, we can better understand how exposure to these media may establish expectations and affect how people interact with the marketplace. Future studies may use these findings to test further media theory, and in turn extend the exploration of mass communication's social influence.

Table 1 Independent and Major Description Word Counts

"Indie" Labels	Major Word Count	Major Percentage	Indie Word Count	Indie Percentage
Creative	387 (393)	0.3672	87 (81)	0.4478
Democratic	166 (178)	0.1575	49 (37)	0.2466
Original	783 (753)	0.7429	126 (156)	0.6340
Organic	1 (3)	0.0000	3 (1)	0.0151
Diverse	33 (39)	0.0313	14 (8)	0.0704
Niche	6 (10)	0.0000	6 (2)	0.0302
TOTALS	1376	1.0355	287	1.4441
"Major" Labels				
Conservative	21 (21)	0.0199	4(4)	0.0201
Commercial	793 (760)	0.7524	120 (153)	0.6038
Bureaucratic	54 (61)	0.0512	19 (12)	0.0957
Bureaucratic Minus "Network"	*39*	*0.0370*	*7*	*0.0352*
Business	888 (918)	0.8425	215 (185)	1.0768
Conventional	72 (68)	0.0683	10 (14)	0.0503
TOTALS	1828	1.7343	367	1.8466
TOTALS Minus "Network"	1813	1.7201	355	1.7863

Note: Numbers in parentheses indicate the expected values (rounded to the nearest whole number).

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