



..... and the Shifting Geography of the Music Industry

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Preface

Relapse Records has been a central pillar of my life since I started working there at age 18. My love of challenging and difficult music has been a part of my life even longer though. As I have worked in the industry through the years, I've seen many changes and developments that have been both alarming and reassuring from music that was previously relegated to the underground now being more freely accessible but, at the same time, watching revenue streams shrink on a seemingly weekly basis. This thesis is a manifestation of my desire to better understand the music industry through the eyes of one record label, and bring my experiences and ground these experiences in geographic thought and study. My biggest help in this has been my wife, Laura, who has quietly let me work 80-hour weeks with rarely a complaint. Without her, this thesis could not have been completed.

Table of Contents

Abstract - p.3
Executive Summary – p.3
Introduction - p.3
Research Question - p.4
Company Introduction - p.5
Significance - p.8
Definitions - p.8
Assumptions – p.10
Limitations - p.11
Literature Review - p.12
Methodology - p.28
Results - p.30
UK & the Republic of Ireland- p.30
Finland - p.43
Creative Content and Digital Geography - p.48
Global Production Networks and Their Implications – p.52
Recommendations - p.54
Physical Product - p.57

CD - p.58

Vinyl Records - p.59

Predictions for the Future - p. 60

Digital Geography Going Forward - p.60

The Physical Marketplace of the Future - p.61

Conclusion - p.63

Abstract

This thesis analyzes the structures surrounding the music industry and how they affect one Philadelphia-based record label, Relapse Records, as it continues to grow internationally. Using a poststructural theory, this is a review of how Relapse conducts business in three key European territories: Finland, the Republic of Ireland, and the United Kingdom. Using both quantitative data taken from internal documentation and as well as qualitative information about each market's media and structural landscape as viewed by local market experts as well as an internal review of Relapse Records' strengths and weaknesses, the thesis is able to offer numerous recommendations for both the physical and digital marketplaces and how the company can continue to grow and build in the face of changing revenue streams and market consolidation. The thesis is also able to identify some potential points of concern for the label and what structural changes may be occurring soon that will have a dramatic impact on how the label continues to operate as a business.

Executive Summary

Relapse Records is a sizeable independent record label based in Upper Darby, Pennsylvania, US with a satellite office in Nijmegen, Netherlands that handles all European functions including distribution, fulfillment, and promotion of all Relapse artists. Using a poststructural approach, this thesis analyzes two key markets in Europe in the UK/Ireland as well as Finland. The UK and Ireland are merged because they share the same distribution partner. Using digital and physical sales numbers as well as qualitative information gleaned from key players in each market, the study finds that Relapse has to enter each market through the key gateways of London and Helsinki. However, as with poststructural thought, this thesis concludes that this course of action is needed partially because the label is a foreign label whereas if it were a local UK or Finnish label, the structures would potentially be different and challenges different. Therefore, Relapse's experiences are unique to themselves given the music they release and other factors involved. Numerous recommendations are made including an increased focus on vinyl records and the digital marketplace. Most key and like any other business, Relapse needs to make its products as easily available for purchase in all markets as possible and at the same time, as difficult to steal as possible. This helps to ensure future success and a continuing flow of revenue to the company.

Introduction

Music is a tremendously important aspect of culture throughout the world. Almost ubiquitous, music has long been a bedrock of society and a way for people to express themselves to others and bring communities together. As society evolved, music became more than just a simple

coming together of people to enjoy a communal, expressive sound. Music became a business and the music industry has, of course, sought out how to commodify and monetize sound in a variety of ways. Be it through the selling of physical units, licensing product to movies and TV shows, or through monetized live performances. However, as technology has evolved, the industry has been somewhat slow to adapt and certain revenue streams are slowly drying up. Simultaneously, other revenue streams are appearing and becoming increasingly important in the new world of technology.

The modern music industry truly started in earnest with the advent of the phonogram and vinyl record as prior, sheet music was the only available option for music with broad international appeal. Soon, music stores became a part of Western society and stores around the world stocked the latest records from the Beatles, the Rolling Stones, the Beach Boys, Madonna, and Metallica. As vinyl faded into tapes and as tapes faded into CDs, these brick-and-mortar storefronts were a constant and common sight throughout any American or European town and often cultural icons situated in the center of town where music fans would come to shop, socialize, and talk about their favorite records and artists. However, times are changing and brick-and-mortar stores throughout the world are closing their doors or allotting less square-footage to physical music. The industry as a whole has had to adapt to the outside technological forces that are changing the way that people consume and use music in their daily lives. However, the industry is not just one giant conglomerate, but rather, millions of players in various segments throughout the industry.

The technological changes in the world from outside forces have dramatically changed the music industry, spurred by macro changes to government policy and corporate domination. Companies like Google and Apple, as well through both legislation and judicial decisions, the United States government and many large corporations have set up a system that currently favors companies that distribute copyrighted content online for free or at a very limited cost over the companies that currently create the copyrighted material consumed by the world at large.

As such, many independent record labels, film studios, newspapers, magazines, and others within the arts and media businesses have shuttered their doors given the current climate surrounding technology expansion. At the same time, record stores and other media outlets such as HMV in the UK and Circuit City in the US have filed for bankruptcy. As such, the climate continues to worsen on a seemingly daily basis for both content providers and the outlets that these providers utilize to sell their goods and services.

Research Question:

Given the dramatic, seismic shifts in the industry brought about by the fast pace of change within the technology industry, how can one smaller player in the industry, a multi-national independent record label named Relapse Records, Inc., thrive and survive in the industry as it undergoes massive changes to both revenue streams, buying habits of consumers, and product consumption where the product can be utilized for the fraction of a penny or easily thieved on various places throughout the Internet?

During this thesis, I will seek to analyze the broad changes in terms of revenue streams that the music industry faces through the scope of a niche, heavy metal and hard rock independent label named Relapse Records, Inc. and offer predictions for the future using the post-structural theory approach.

In this thesis, we will analyze 2 countries in Europe that are key for Relapse Records and for the music industry as a whole: Finland and the United Kingdom. The Republic of Ireland will play a small, ancillary role since they are distributed by Relapse's same distribution partner that services the United Kingdom and the physical sales generated in the Republic of Ireland are unable to be untied from the United Kingdom's physical sales though Ireland's sales are but a mere fraction of those generated by the UK.

In addition, the thesis will analyze the firm's reactions to the changing dynamic within each market structure and how it can best continue to monetize its current market share.

Company Introduction

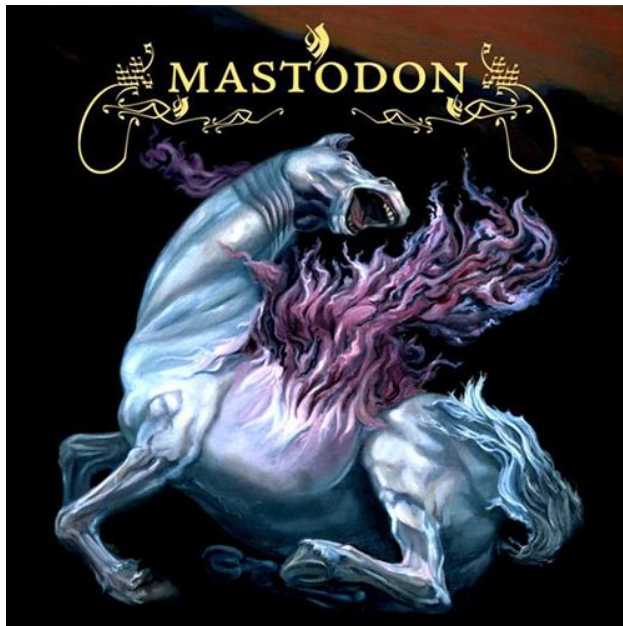
Relapse Records is a large, independent record label specializing in rock, heavy metal, and synth music that is both challenging and engaging to the listener. The company, founded in 1991, by Matt Jacobson has continually expanded over the years. In the early years of the company, Relapse specialized in smaller releases with developing artists but continued to grow and build a large fan base throughout North America by partnering with the German record label, Nuclear Blast Records, who was still developing at the time and had numerous bands that American fans wanted to hear but could not given the high importation costs. In addition to this partnership, important releases entitled 'Tales from the Thousand Lakes' and 'The Karelian Isthmus' from the Finnish band, Amorphis, prompted continued and steady growth.



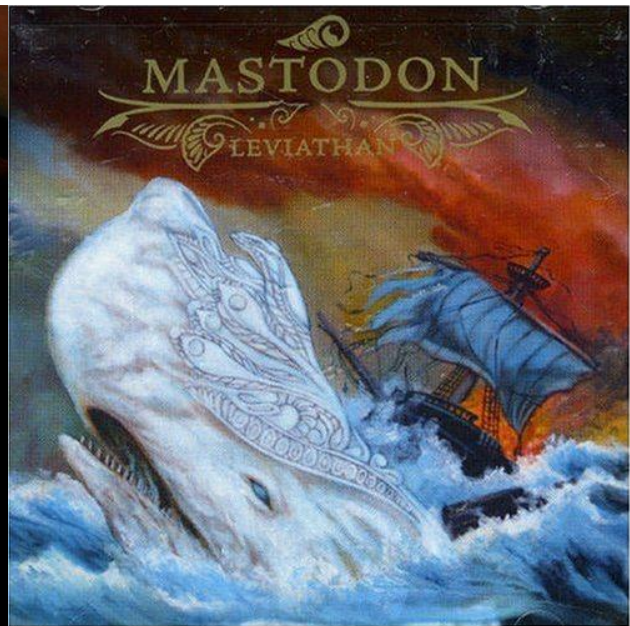
In 1999, the company expanded to the European market by opening an office in the United Kingdom based just outside of London. Quickly realizing Germany was the most important European market, the company shifted its European foothold shortly thereafter to Berlin.

Growth continued as the company signed and released numerous critically acclaimed and landmark albums from Nile, Exhumed, Nasum, and Today is the Day. These records propelled the presence of a once-small, developing record label into a bona fide international record label with a real music press presence and distribution network in both North America and now in Europe as well. While certain territories lagged behind others for a variety of reasons, most notably Australia and New Zealand, the presence of Relapse Records was firmly implanted in the European music scene.

Shortly thereafter, Relapse Records again moved to its current home in The Netherlands in an effort to solidify develop a better logistics situation for stock movements throughout the continent. It was at this time that the company experienced its most rapid growth with albums from The Dillinger Escape Plan and Mastodon. Both Mastodon and The Dillinger Escape Plan grew exponentially within months of the initial full-length releases 'Remission' and 'Calculating Infinity' and even today remain extremely large bands that consistently draw thousands of fans per night all over Europe. These bands fully established Relapse as a tastemaker record label that was highly sought after by large music distributors throughout the continent. During the years following the releases of the initial Mastodon and The Dillinger Escape Plan titles, the label continued to develop a host of large bands that further solidified the Relapse brand with Mastodon's classic album, 'Leviathan' fully showcasing the classic, if somewhat intangible "Relapse sound" of anger, fury, and sophistication in 2004.



Mastodon "Remission" cover art



Mastodon "Leviathan" cover art

After Mastodon was sold to Warner Brothers, the label experienced some lean years in terms of larger bands. Groups like Dying Fetus and Nile sold tens of thousands of records around the world, but the sales were miniscule compared to those of the more mainstream sounding Mastodon back catalog or The Dillinger Escape Plan albums of the preceding years.

However, Relapse Records made some calculated choices and rather than chasing “the next big thing,” continued to sign smaller bands it liked and believed they could develop into larger bands. As such, the company has experienced growth in recent years again with the signings of a few key new artists including Baroness and Kingdom of Sorrow, both of which have developed into large bands that, unlike most Relapse artists, even appeal to mainstream audiences. Baroness in particular is a breakout success that evolved from a small, sludge doom metal band into a rock mainstay that has all the makings of a future platinum selling artist. Their newest record, ‘Yellow & Green’ debuted in the US Billboard Charts at #30, #13 in Germany, #22 in Finland, and between #50 and #90 throughout much of the rest of Europe.



Baroness “Yellow and Green” artwork

However, Relapse Records does not exist in a vacuum and it was around 2004 that the music industry began to change with the Internet and technological revolution. Gradually, CDs sales, the traditional medium of Relapse Records, began to decline slowly (when Relapse truly became a fully functioning label around 1995, tapes were well on their way out of the market). Labels throughout the world, certainly including Relapse Records, have seen their ability to sell physical units fall as traditional brick-and-mortar stores have shuttered their doors and other traditional outlets have allotted less floor space in each store to selling music even as these stores offer more floor space for items that offer both new and innovative ways to enjoy music like cell phones, iPods, and iPod speakers as well as more traditional options like vinyl record players, high-powered receivers, and stand-alone floor speakers.

As the product life cycle of the compact disc continues to wane, Relapse Records, along with most other record labels, are seeking out new ways to sell music as the demand and consumption of music is still extremely strong but the revenue streams are weaker than in

previous times. As such, Relapse, along with a litany of other record labels in a variety of different genres, find themselves in a difficult position where the demand for music is still as strong as ever, but the value of the product, the music itself, is deteriorating to the point where the business models of old and even the current business models are no longer viable options for record labels moving forward.

The new digital age of music has provided both new opportunities for record labels and cut off other, more traditional opportunities for economic success and this thesis will seek to define some areas where Relapse Records can still grow into the future in a smart way while ignoring past opportunities that are either not going to be as fruitful as they were in the past and not worth the time or are simply a money pit that should be avoided.

Significance

The significance of this piece rests in the applicability to a wider subset of individuals and businesses. In an age where the largest revenue streams are drying up, the business of music is seeking for ways to stay relevant and financially viable. This study is an investigative look into the financials of a mid-level independent record label and their experiences in three key European markets: Finland and the United Kingdom and Republic of Ireland. It helps to uncover how these markets work in the modern day with constant technological changes that are driving music from merely a physical format into a media that is consumed in a whole host of different ways. While the experiences of other record labels will not be exactly the same, there will definitely be some similarities that all American record labels face when entering a variety of European markets.

Featuring both qualitative and quantitative data as well as anecdotes from key industry professionals, the study briefly examines Relapse' current market position as well as ways to better reach and build its fan base. The lessons drawn are applicable to most, if not all, independent record labels that sell music into multiple markets moving forward.

Additionally, the failure or success of many independent record labels, including Relapse Records, will have drastic implications for certain genres of music, artists, fans, and a litany of other stakeholders. Musicians have long needed outlets to release their music to a wider audience and fans have looked to labels and journalists for cues on what interesting bands are worth their time and money given the vast ocean of musicians in the world. If labels and other tastemakers dissolve, other structures within the music industry, such as the live music and concert promotion industries will struggle tremendously as well given the dispersion of interest throughout the world.

Definitions

There are certain terms which will be used in a variety of ways, some of which are music industry-specific or mean different things in the music-industry than they do elsewhere. Some

other terms are common in areas of wholesaling and yet, others still are commonplace only to a few industries.

Record Label: Often misunderstood, the record label is responsible for investing in and promoting its artists. From funding the recording, art, marketing, and promotion of an artist to the international distribution, the standard record label is responsible for all large investments in a new artist. Usually, the label has little to do with touring aside from connecting artists with booking agents, labels traditionally only see income from sales of albums though the model is being forced to change due to looming financial constraints.

Unit: A unit can mean a variety of things in a variety of settings, but for the purpose of this paper, a unit will describe a commodified, saleable item of music, be it a vinyl LP, CD, or digital single or album sold via iTunes.

Distributor: Distributors are the middleman between the record label and the stores that sell to consumers. Their job is to educate their wholesale clients (usually stores) on why customers will be coming to those stores in search of a particular label's titles and then sell those titles to those same clients. Most record labels, excluding major labels like Sony and Warner Bros, are not large enough to manage international distribution without the help of localized distributors. Distributors usually receive around 20-30% of the wholesale price of each item sold as a fee for their services.

Return(s): The music industry is one of few industries alongside film, books, and magazines where vendors are able to return products to their suppliers at the same price they paid for them. This policy allows stores the leeway to take on product new artists at a lower risk and with little in the way of opportunity cost. However, there is significant risk for the record label and for the distributor here as it is the job of both to gauge the actual saleable interest the band in each market and provide as closely as possible the number of units received so as not to be flooded with returns that may not be able to be sold.

Label Manager: There are two types of roles that are commonly called "Label Manager" and to some extent, they both manage the label. The difference comes from where they are employed. If the "Label Manager" works for the record label, they are literally managing the label and all marketing, band relations, royalties, the pressing of the records, managing deadlines, etc. However, a "Label Manager" for a distribution company often manages twenty or thirty labels and is responsible for coordinating with each record label and then passing that information onto the sales team at that distributor. In short and broadly speaking, the 'Label Manager' at the distributor is responsible for the actual selling of goods to stores whereas the 'Label Manager' for the record label is responsible for all other functions leading up to and following the actual sale of the goods.

A&R: Short for "Artist and repertoire," the premise for A&R is talent discovery and acquisition. At a large label, there are employees whose full time job is to discover new talent and work with the existing talent on the roster to best develop the artists for the largest commercial gain for the

label and the artist, those the label's primary motive is itself, not the artist, who is generally viewed merely as a business partner. In Relapse's case, the bands are definitely business partners but things are done more by committee and each staff member handles different parts of the working relationship with each artist rather than having a single liaison at the label.

Co-op Advertising: Short for "cooperative advertising," co-ops are a form of point-of-purchase advertising done by record labels and distributors at stores in the form of high-profile displays at the ends of aisles, called "endcaps," or listening booths, premium racking at eye-level, or displays of another kind for a particular release. In addition, stores and labels often agree on a cheaper wholesale price for the participating stores. The industry standard at this point is that these expenses are usually shared between both band and label. Traditionally, co-op advertising has been highly effective in securing more interest from foot traffic in stores.

Sales Statement: A monthly summary of all sales and returns. These are provided by distributors to record labels on a timely basis and form the basis for most income received by a label on a month-to-month basis.

Assumptions

This study will assume that the population in the United Kingdom, the Republic of Ireland, and Finland is as interested in heavy metal music as every other country studied. While nearly impossible to calculate the true interest in heavy metal music in any modern country nowadays given the possibilities for illegal downloading, the paper does not have the length, nor desire to calculate real interest in heavy metal music since Relapse Records, like all record labels, relies on very specific target markets that is already interested in heavy metal and hard rock music.

Another assumption to be included in this study is that every fan of music has the Internet. While nearly ubiquitous now in Western society, there are still pockets of society in the United States and other nations that do not have the Internet for a variety of reasons, including both economic and personal.

One other assumption to be made is that the release schedule for Relapse was of the same strength each year. In the entertainment industry, record labels, like all other businesses, have both strong years and weak years. Certain bands or artists reach higher levels of popularity than others for a variety of reasons, some of which will be examined, but the general assumption to be made about Relapse Records is the strength of the release schedule was the same for each year as this will help the study since the staff has continually put in the same, continuous, high level of effort for each album released each year but the results can vary drastically depending on outside influences including press interest and response as well as distributor buy-in, changes in distribution companies, and the closing of certain key accounts in each country.

Another major assumption is that there are no major hiccups within the multiple business processes within Relapse Records internally. Between staff turnover, a warehouse fire in

Sevenson, the Netherlands, and a host of other issues, Relapse Records, like all other companies, is consistently in a period of flux, tumult, and change. While these changes have affected the business in a variety of ways, it is utterly impossible to exactly correlate the success or failure of a record or of the business in a particular market. There are simply too many factors to consider so this paper will assume that those business changes have not grossly affected the business or the records released by Relapse Records during the time frame analyzed.

Limitations

The major limitation is the scope of the study. This study will examine one independent record label amongst a sea of labels. Some larger, most smaller, but Relapse Records is but one record label among countless others. Every label experiences each territory it enters differently from every other label because of the catalog of releases, quality of the label and distributor staff, interest from, and relationships with magazines and other key media, the understanding of the market by buyers at the stores which record labels rely on distributors to help change, and the interest level in a particular genre or subgenre of music among the local population. There are a lot of variables within each territory and only studying one record label means that it is impossible to compare the experience of Relapse Records with the experiences of other labels in each territory.

Another area that this study is limited is within the scope of the countries. This study is only analyzing two countries in an in-depth manner: the United Kingdom and Finland. Aside from the obvious geographical and population differences, there are also cultural and technological differences which will only play a minor role in the thesis but, in actuality, play significant roles in the purchasing decisions of many citizens.

Another limitation is the lack of statistical data available that is able to correctly analyze the massive shifts that have taken place in the past few years throughout the industry from a purely physical marketplace to a digital and now streaming music marketplace. The financial data exists but that fails to properly quantify those financials with a litany of factors that influence the bottom like price drops in technology used to access digital goods as well as costs in manufacturing and producing vinyl, CDs, and other media forms. Further, the financial data does not paint a complete picture of the true interest in Relapse Records' products throughout each territory studied.

Perhaps though, the largest limitation in this study is the inability to factor in the real number of illegal downloads that have happened for each record. In the modern age of music, sales numbers alone do not alone reflect the actual public interest in a band. The illegal downloading number is simply impossible to calculate given the variety of ways and places one can download Relapse Records' product and, as such, this presents the most major limitation to this study as well as most other studies on the music business for without that number, it is impossible to truly gauge public interest in a particular artist or style of music as neither unit

sales nor concert attendance alone or combined paints a truly accurate picture of the landscape.

Literature Review/Current Debate

The current debate on the geography of music and, to a lesser degree, the music industry has widely covered parts of the music scene that this thesis will address, but has largely ignored hard rock and heavy metal which are subgenres that are unique in a variety of ways that affect the outcome of studies and discourse in the debate on the geography of music.

The current debate has focused on other areas of the music industry. First and foremost, music geography has faced an uphill battle in a variety of ways and has been widely overlooked (Connell and Gibson, 1997, 342). Not only has the overall debate been rarely approached except for a few pioneers in the 1970s in Charles Gritzner, Ben Marsh, Floyd Henderson, and A.D. Horsley amongst others, but when the topic has been discussed, it has been received mixed reviews at best from fellow academics (O'Carney, 1990, 38) as the field has been seen as an ancillary to other cultural geography topics.

In doing further research, it has become clear that almost all research done until now has focused strongly on the US and a significant majority has focused on one particular genre of music – country music – since it is easy to associate with the southern United States and other more rural parts of the country (O'Carney, 1990, 40).

Another area recently studied was 'World Music' and how it is marketed. World Music is marketed as an escape from the mundane slog of everyday life and is meant to fill a room with new sounds and transport the listener to a different place. This style of music has a direct cultural and geographic angle that is easy to link to various aspects of cultural and human geography and makes an interesting study on why certain listeners feel drawn to whisking themselves away to a far off land musically (Connell and Gibson, 1997). Connell and Gibson argue that "shifting economic trends - both quantitative and qualitative - have resulted in new kinds of flows and exercises in market power" (Connell and Gibson, 1997, 344) and further argue that "global flows of culture have become more rapid and numerous as the movements of people become more widespread" (Connell and Gibson, 1997, 344).

While certainly true that shifting trends have become more rapid and numerous and the movements of people have much to do with it, Connell and Gibson fail to appropriately credit the Internet, which is likely the greatest information tool since the invention of the printing press half a millennium ago. Certainly modern transportation technology is partly to credit for the merging of sounds, the development of public interest in world music, and such, the Internet has blurred those lines well beyond what travelers even 15 years ago could have ever dreamed.

Music until now has often been studied for its cultural aspects throughout the field of Human Geography. However, within the area of music geography, there are a litany of areas to study

as the field is still widely untouched. Music is both cultural and a global business so it needs to be examined carefully from both angles. Not only does it need to be studied from both angles, but it needs to be studied using different genres as different genres and subgenres of music involve different subsets of culture and people.

Until now, there has been little debate that approaches the music industry from a truly geographical, country-to-country perspective at all and especially through the lens of a post-structural approach. Given the lack of a debate from a poststructural approach, there is much to be studied. Understanding the music industry is a bit like understanding a series of seemingly unrelated processes that all have to come together to build and maintain a successful artist or band in nearly any genre and as the industry has changed and evolved, these processes have only become increasingly important and pronounced given the sheer flood of music available to the average consumer.

Currently, there has been no debate about the geographical angle of heavy metal music or the business of heavy metal music. In addition, little attention has been paid to Europe as a whole in music geography. For international businesses that thrive on reaching fans throughout the European continent, understanding cultural nuances, distribution channels, and business norms in each country is absolutely key to the success of the business. There have been recent books like Sound, Society and the Geography of Popular Music which was edited by Ola Johansson and Thomas L. Bell that have started to breach the topics this thesis will cover. One chapter in the book written by Olaf Kuhlke, entitled "The Geography of 'Canadian Shield Rock'" discusses Canadians and their cultural attachment to certain Canadian bands like The Tragically Hip and the Rheostatics, whom are purely niche bands that only experienced true commercial success in Canada for a variety of reasons that Kuhlke delves into with some precision.

However, bands like The Tragically Hip were truly Canadian phenomena and had little, if any, impact in the United States aside from areas near the border with Canada like upstate New York, New Hampshire, and Vermont since the band was able to secure a few concerts in that region or draw nearby Americans across the border into Canada to see their live performances or be surrounded by the music in Canadian bars, stores, and music venues. Though the Tragically Hip were a staple on the major Canadian music television station, at the time called Much Music, played the band constantly on the air it never resonated in the United States and the band always maintained a very low profile south of the border while north of the border, the band were rock stars (Johansson and Bell, 2009, 161).

One reason that Kuhlke surmises that Canadian Shield Rock bands like The Tragically Hip were so popular in Canada is the influence they placed on their "regional and national identity" which parodied Canadian culture and traditions and "their music has created distinctive representations of what Canada is to them and to the wider public, and to what it ought to be" (Johansson and Bell, 2009, 161). The music, therefore, is so fiercely Canadian and proud of being Canadian that it is simply unable to breach the structures of the industry within the United States, leading to the bands like the Tragically Hip and the Rheostatics being solely niche artists within the United States while being large, mainstream acts north of the border in Canada.

In addition, language, Kuhlke argues is a key component of understanding Canadian Shield Rock. Given the multilingual nature of Canada, when Canadian bands sing in both French and English, Kuhlke states that the bands “sing it for ourselves,” meaning that they sing it for Canada as a whole and care not whether they have a chance to be commercially viable south of their border in the much larger music market that is the United States. This disregard for global commercial success in exchange for a more locally focused style is celebrated in Canada especially given that Canadians view their level of “cultural inclusiveness” as being part of the Canadian experience and is distinctly a Canadian tradition (Johansson and Bell, 2009, 165). They view the larger cultural structure of the multilingual Canadian society as something to be proud of regarding Canadian tradition, and therefore, make an effort to include all Canadians in their artistic endeavours rather than simply appealing to the anglophones or francophones exclusively.

However, multiple language usage, can be used to deceive or perpetuate myths. As Kuhlke points, multilingual Canadian Shield Rock bands are perpetuating a myth Canada is truly bilingual and that in 2001, only 18% of the population in Canada spoke both English and French fluently, which closely mirrors the number of Americans that speak at least one language other than English, though usually this is not French (Johansson and Bell, 2009, 165). Therefore, it could be argued that Canadians are using their local music to tell a somewhat misleading story about themselves that makes them feel different, unique, or superior to other countries and cultures as a form of national pride to boost the collective national ego.

Another area of Canadian Shield Rock that is important to understand is how it separates itself from the United States and American artists in particular. According to Kuhlke, and viewed through the postcolonialism theories of nationalism, Canadians view there to be a dominant “other” force in their lives that they rebel against, notably the world’s leading exporter of popular culture and their geographic neighbor, the United States of America. As a result, “discernable anti-Americanism is observable in the Canadian popular media, fuelling the representation of Canada as better than the United States because of the things that (the United States) does not have” (Johansson and Bell, 2009, 167). In many commercials, including Molson Canadian beer commercials, Canadians are portrayed as being forced to endure some level of American ignorance or stupidity, thus marketing Canadians as better or smarter on some level, and as a result, distinctly not American (Johansson and Bell, 2009, 167). This level of anti-American, revelling in “Canadianness” discourse has seeped into the Canadian Shield Rock has and bands place emphasis on the things that make them Canadian and superior to those things they view as major flaws in American society like guns, violence, and the nonstop barrage of American commercialism that pervades all aspects of life in America. As evidence, Kuhlke highlights a song from The Rheostatics entitled “Guns and RDA (Rock! Death! America!)” which focuses on American life and how children are desensitized to violence at such an early age that that familiarity leads to harmful or dangerous consequences or choices in that child’s adolescent or adult years (Johansson and Bell, 2009, 167). These critiques of American society are partially based on societal differences, such as the prevalence of guns in the United States and the relative scarcity of guns in Canada, but the outspoken nature of bands like The

Rheostatics on American society, even though they aren't from the United States, is driven by what some might call an inferiority complex on the world stage. Kuhlke believes such anti-American words and tendencies are the result of having such pride in your homeland that many Canadian citizens, such as the members of The Rheostatics, fear being mistaken for American. This fear is so pervasive that they make an attempt to make it so clear that they are not from a society as barbaric and uncivilized as the United States, but rather, are distinctly Canadian and should be known as such. Kuhlke's basic argument from a post-colonialistic point of view is that the members of The Rheostatics and Canadian Shield Rock groups like them fear being mistaken for Americans (Johansson and Bell, 2009, 168).

Additionally, Canadian Shield Rock musicians focus heavily on local Canadian politics and ensuring that Canadian society benefits all members of the country. Again citing The Rheostatics, Kuhlke argues that songs like "Bad Time to be Poor" are hardline stances against the conservative government of Ontario and are Rheostatics' unadulterated statement that the wealthy that have never cared about those less fortunate members of Canadian society and are willing to throw the impoverished into the cold and out of shelters that house the homeless (Johansson and Bell, 2009, 170). The Rheostatics expect better of Canadian society and want Canadian society to work for all Canadians. Therefore, the music is targeted at changing the political geography of the country by impacting and spurring the youth vote to make the country better in their eyes. Songs like "Bad Time to be Poor" are purely designed for Canada by Canadians that clearly do not care whether this has any broad commercial appeal below the border or across an ocean.

Place also plays another role in Canadian music and Canadian Shield Rock. Themes of long, cold, and sometimes cruel winters showcase the topography and climate of the country. Surely, while others in distant and near lands sing of brutal winters, few sing of the "Great Plains" and Thompson, Manitoba as the Tragically Hip did or of the natural beauty and vastness of country as The Rheostatics have. The vastness and "imposing wilderness" of the country are common themes that Canadian Shield Rock and Canadians in general pay attention to, respect, and pay homage to within the art that they create (Johansson and Bell, 2009, 174). These themes are often unlike themes that Americans write about, which is another source of material for Canadian Shield Rock bands as they allege that Americans write about more vapid topics and temporary topics such as love or sex than things like wilderness, family, and political activism (Johansson and Bell, 2009, 172).

Another chapter in Sound, Society, and the Geography of Popular Music written by Kevin Romig focuses on California and is entitled "A Listener's Mental Map of California." This chapter focuses on how California is viewed as a place within the framework of popular music. California, in particular, Los Angeles, and Hollywood in more specifically, is a central hub of activity for the music industry. As the offices of many labels are based there as well as many music producers, stars, movie studios, and legendary venues and clubs are all located within a short distance from each other Los Angeles as a place holds a special position within music geography.

Romig first looks at Los Angeles, with its beautiful weather, beautiful people, and beautiful houses as a setting for escapism, vacation, and love and cites songs like 1956's hit "City of Angels" by the Highlights as a prime example. Even songs like "I Left My Heart in San Francisco" by Tony Bennett showcase the escapist nature of California within American society. Songs about The Golden State within this theme suppose that "once you get to California, you will find a tropical and romantic place" (Johansson and Bell, 2009, 112). Further, this escapist theme highlights that Los Angeles is where anyone can go and "make it." Even a poor boy from the American South or the east coast ghettos can become famous, rich, and live the good life in California. Romig argues that songs like Chuck Berry's "Promised Land" laid the groundwork and shaped how the state of California was viewed for much of the twentieth century by people all across the world.

Another area that the music of California focuses on is the youthful, exuberant nature of the surf rock era where teenagers would skip school and grab their surfboard and spend all day "Surfin' USA" as was popularized by the Beach Boys in 1963. While definitely blending with the escapist nature of California, songs like "California Girls" helped shape the way California and its young people are viewed as prettier than anywhere else and further cements the youth, consumer, funtimes culture that California successfully exported to the rest of the world via songs, movies, and other forms of media (Johansson and Bell, 2009, 113-114).

Experimentalism and the Summer of Love are another key component of looking at the musical identity of California as a whole according to Romig. Folk anthems like Scott McKenzie's "San Francisco (Be Sure to Wear Some Flowers in Your Hair)" showcased the portrayal of the "Summer of Love" and the San Francisco subculture that ran counter to the light-hearted nature of beach anthems like those of the Beach Boys and Buddy Holly. The hippie culture of Northern California and the legendary debauchery Monterey Music Festival in 1967 expanded outward from its Northern California incubator and "was the catalyst for future musical festivals such as Woodstock and Altamont" (Johansson and Bell, 2009, 115) but never became as popular or had such an impact on a specific place as it did in Northern California.

Failure is a fact of life and an especially constant feature when walking around Los Angeles, even today. The hopes and dreams of millions can only truly come true for a small handful of would-be stars. This is the unfortunate nature of Hollywood and as such, there is a constant lyrical theme around the failure of people whose Hollywood dreams never came true. Romig cites Bob Seger's "Hollywood Nights" as a prime example of a song that highlights a "Midwestern boy who has fallen for an experienced California beauty" who eventually leaves him and he's far from his true home in the Heartland (Johansson and Bell, 2009, 117). California, in songs of this theme, is "rarely depicted as home but rather a place of lost identities and confused times" (Johansson and Bell, 2009, 117). This dystopian nightmare is far from the utopia shown by others, but highlights the peaks and valleys of the nature of show business and California life. The structures of the industry and the businesses of culture cannot allow for the success of everyone who wants it, and those whom did not experience the success of their dreams are left to deal with the wake of the failure, and this topic is a frequent geographically focused topic that surrounds California and show business life.

Motley Crue, Whitesnake, and Poison ushered in the hair metal genre during the early 1980s and with it, a period of songs about hedonism and drugs. While the Eagles' "Hotel California" began the era according to Romig, it is clear that at no point prior or after, was California viewed in the same way as when Motley Crue ruled the Viper Room in Los Angeles. Songs of sex, fast cars, and drugs were constant and themes made frequent, veiled references to Beverly Hills and the sex and drug culture of the rock stars. Further, Sheryl Crow, wrote of a bar on Santa Monica Boulevard in her hit "All I Wanna Do" which highlights the desire to live her life and have fun and lead a more hedonistic lifestyle rather than "finding an unfulfilling job to keep up with societal norms" (Johansson and Bell, 2009, 118). The author, Romig, fails to address one major point in this subsection however. The hedonistic, live-for-today lifestyle, while surely reinforced by songs and musicians like Motley Crue, has been pervasive in the shaping of Los Angeles in particular through a geographical lens but there are other factors at play as well. These factors include hedonistic escapades by global celebrities and those escapades are magnified and broadcasted by the tabloids that market and sell celebrity gossip throughout the world so while Romig is right in asserting that this is one major geographical topic of music that discusses Los Angeles and California, this is not the only industry that helps reinforce this notion of California and its association with a hedonistic lifestyle.

The last theme that summarizes the geography of California within music is "Masculinity and the Gangsta's Paradise" according to Romig. Compton and "South Central" refer to areas within Los Angeles that had fallen into severe disrepair since the Watts Riots of 1965 and out of this poverty had emerged gangs, violence, and its own style of music pejoratively termed "Gangsta Rap" with lyrics themed around misogyny, crime, violence, prison, danger, and thug life (Johansson and Bell, 2009, 119). Dr. Dre and Snoop Doggy Dogg, two of the most successful rappers, as Romig points out, wrote lyrics with themes that primarily centered around "gang banging or violence, having very casual sex, and bragging about the success of themselves as rappers" and these themes portrayed California as having devolved from the fun times haven of the 1950s and 1960s into the new Wild West.

As Romig points out, California has numerous representations within music and they vary quite dramatically - from a tropical, romantic haven to somewhere that no one would ever want to go in a drug abusing, violent hellhole filled with rampant gang activity and a lack of a future for its current inhabitants. While certainly not the haven as portrayed in some songs or the central crossroads of vice and violence, the numerous references to California in music have established and embedded California into the popular consciousness of music fans across the world far more than nearly anywhere else on the planet.

These different views of Los Angeles and California, as Romig points out, shape the global perspective of the region and tell varying narratives about the region, which can dramatically alter the cultural and economic significance of that region throughout the world. Therefore, "positive" songs about California like the carefree lifestyle of "Surfin USA" and finding love like "City of Angels" have helped to drive and perpetuate the notion of California as a desirable place to live and work, leading to a better local economy in California.

From Sound, Society, and the Geography of Popular Music, another music geographer, Holly C. Kruse, discusses the hugely important question of local independent music scenes and the how the Internet affects each scene since music, at its root is always local first. Focusing on Champaign-Urbana, Illinois and San Francisco, California, Holly C. Kruse looked at both bands and labels over the course of nearly two decades.

In the early 1990s, according to Kruse, Champaign-Urbana was a vibrant place for indie rock with numerous labels, including Parasol Records and Touch and Go Records, and bands tucked away in this small college town. During the late 1980s and early 1990s, the biggest bands from the Champaign-Urbana scene were able to record locally and cheaply and grew to sign deals with large independent labels like Sub Pop or even majors, like Poster Children did, when they signed to Sire Records. However, as Kruse points out, Parasol Records in particular had trouble selling records locally but no problem selling records through their mail order service to far off places like the United Kingdom (Johansson and Bell, 2009, 206). Ironically as well, the local college radio station, WPGU run by University of Illinois students, failed to help out the local scene and focused on other styles of music. Further complicating matters, the two main clubs within Champaign-Urbana, in particular the larger Mabel's as well as the Blind Pig, according to Kruse, were closed to local acts and only looked to book larger national and international artists.

Ironically, the "Champaign scene" came at a very odd time in music geography as it was at that time that the Internet started to truly become a force and bands became more interlocal insofar as when they toured, they had a network of friends from bands in similar situations around the country or simply fans who would book and house them when they came through town. Now that the Internet has truly connected the world, Kruse argues that "looking at scenes in isolation makes even less sense (that before), as the ability to connect with others across scenes and to disseminate independent music has become easier than ever before" (Johansson and Bell, p. 209). Therefore, locality was somewhat lost in the mix for the Champaign scene as it were, as the new local became the digital medium of the Internet.

Now, according to Kruse, the Internet plays "an extraordinarily important role in developing the sort of inter- or trans-local connections that were evident in (her) research done in the late 1980s and early 1990s before the Internet was widely used by the American public" (Johansson and Bell, 2009, 211). This digital medium now allows related and parallel subcultures to become connected, and feeding off of each other in ways never possible before the advent of the Internet. "At the most basic level, Internet discussion boards and other resources facilitate personal connections across localities" and allow people from far away places that share similar interests or musical tastes connect and discuss music, bands, and potentially introduce new and exciting bands to one another (Johansson and Bell, 2009, 211).

Additionally, the Internet breaks down barriers between artists and fans (Johansson and Bell, 2009, 211). Formerly artists were nearly off-limits to fans, but the digital age has removed most barriers and has also allowed independent artists to engage in direct to fan marketing and as

such, better sell their wares. Before the advent of the Internet, it was difficult for local bands to find tours, sell tickets to shows, and sell merchandise, but now bands “find it easier to find gigs, places to stay, and people to whom to sell tickets and merchandise” (Johansson and Bell, 2009, 211).

Moreover, record labels, even the smallest labels, are now able to have “a presence on the Internet” where they can sell their wares. Those small labels were “not previously able to get their product in many record stores or to many buyers through mail order, or played on the radio” but now have a niche place on the Internet where like-minded fans can both discover new artists as well as purchase products without the traditional gatekeepers in the distribution companies and record store buyers (Johansson and Bell, 2009, 212).

Kruse argues that “whether file-sharing directly results in CD sales or not, the technology has been integral in disseminating more local music to regional, national, and international audiences than ever before” (Johansson and Bell, 2009, 212). Further, another “newer technology has been important in getting local music to larger publics is digital recording technology” where technical savvy musicians can record to their home computers rather than contracting expensive music studios for a week at a time, which also prevents them from working (Johansson and Bell, 2009, 212). Kruse argues that “most musicians can make a living from a small but loyal fanbase and completely bypass the bloated entertainment industry” (Johansson and Bell, 2009, 212).

Kruse, quoting a Milwaukee music writer, argues that the digital age has completely decentralized the music industry. “In the past, gatekeepers controlled access to recording equipment, to recordings themselves, and to distribution and promotion. The Internet, in some ways, obviates all of that (certainly the first two)” (Johansson and Bell, 2009, 213). Further, the digital world now allows for bands and scenes to form over the Internet and actually never meet in person, which radically decentralizes “local knowledge, history, connections, and material resources” (Johansson and Bell, 2009, 213).

However, Kruse also realizes that there are still gatekeepers in the industry. “Access is not available to all” she concludes and cites the cost of computers, the Internet, and equipment as barriers to entry for all across the world (Johansson and Bell, 2009, 213). Also, the market is now saturated given that any DIY musician can sell their wares online, making it difficult for any particular artist to stand out among a sea of others. Further, “despite the great optimism about the ability of the Internet to circumvent gatekeeping apparatuses of the mainstream industry, many listeners may be turning to other gatekeepers, like iTunes’s, Amazon’s, and other online commercial behemoths’ links to what people who bought a particular song or CD also bought or to what an algorithm has determined that the consumer might like” (Johansson and Bell, 2009, 214). This means that while there is more media and music available to any fan, the sheer volume is daunting and drowning and as such, fans seek out other sources to give reference points for music they may be interested in hearing.

Kruse's last point in her article on the Internet and music scenes is that they create both distant and local interactions. Therefore, people on different continents can interact, but at the same time, locally based fans can interact on the same medium and it encourages face-to-face meet-ups and interaction. Using the example of British goths, online conversations "rather than removing the need for physical travel, the tendency was for such virtual interactions to encourage goths to want to see their friends in face-to-face circumstances" (Johansson and Bell, 2009, 215). Therefore, virtual interactions of music fans lead to physical interactions if the participants are near enough. As a result, these local interactions help to build and maintain local music scenes. As a way of further highlighting Kruse's point, a new dating site came online in the UK at the beginning of 2013 called Heavymetaldating.co.uk and its goal is to start relationships from the digital world where fans who share a common interest meet and then take that to a physical meeting at a local level at concerts and/or other activities that the pair may share.

Another chapter in Sound, Society and the Geography of Popular Music, written by John Lindenbaum, focuses on the Contemporary Christian Music, or CCM, which "is one of the fastest growing segments of the music industry at a time when the record industry is in a state of crisis with declining sales" (Johansson and Bell, 2009, 281).

Lindenbaum's analysis of CCM comes from two perspectives. First, is the definition of the genre since the genre itself is a mixture of multiple styles with a common lyrical theme. The second perspective is the geography and social practices of the musicians, recording engineers, booking agents, record company executives, radio programmers, and journalists which helped to establish CCM within the United States.

Lindenbaum argues that CCM needs to be properly defined as it does not adhere to one stylistic palette. Therefore, Lindenbaum argues that CCM should be defined as "popular styles of music aimed at the so-called Christian market" (Johansson and Bell, 2009, 282). Further, the Christian market, as it is currently defined, is "represented by gatekeepers such as Christian radio stations and Christian retailers" and therefore, the term CCM, "is a marketing term more than a referent to a particular sound or lyrical style" (Johansson and Bell, 2009, 282). John Lindenbaum points to the fact that country stars like Alan Jackson and Carrie Underwood can be marketed to Christian bookstores and Christian radio stations and as such, those songs become part of the CCM movement by the simple fact that they are now being sold and marketed to a Christian audience. At the same time, hard rock bands like Los Angeles' Payable On Death (P.O.D.) are also marketed to the same audience and are also defined as CCM (Johansson and Bell, 2009, 282). Therefore, the term CCM is more a reference to the audience the music is marketed towards and outlets that sell the music itself rather than a particular style of music.

Lindenbaum also seeks to define CCM by what it does not encompass which is traditional gospel music, whether "black gospel" or "white gospel" and it also does not include children's music or other religious recordings which are also marketed to the same crowd and sold in the same bookstores as CCM.

Therefore, Lindenbaum's hypothesis on what CCM really is is that "a host of players in the CCM industry determine what qualifies as CCM" (Johansson and Bell, 2009, 282). From the Gospel Music Association, to the "Grammy-like Dove Awards" to the Billboard charts, which require more than 50% "Christian content," 25% of sales to be via Christian outlets, or significant national Christian airplay, these outlets have significant implications for what is termed CCM. In addition, record labels determine how and where a record is marketed so even if the artist does not want to be part of the CCM movement, a label has the final say and can point the marketing budget of a record in that direction. In the live arena, Christian music festival organizers also select artists that they feel meet their criteria via popularity, content, and artist availability. In addition, there are numerous magazines that cover music in the CCM world, but none more so than *CCM Magazine*, which is obviously dedicated to covering the CCM world. Finally, the artists have some say in determining if they are part of the CCM community as they can declare themselves publicly to be part of the community or they can tell the world that they do not write music for the CCM audience. There are some fringe cases of course like "artists who are Christian but not Christian artists" and as such, the lines become somewhat blurry and CCM can sometimes need to be defined as specifically as on a case-by-case basis.

Lindenbaum then extrapolates from the determination of what CCM is and looks at who the genre itself appeals to and is marketed towards. "CCM tends to appeal to members of churches that originated in America (Baptist, Nazarene, Pentecostal, Free Methodist, nondenominational) rather than in Europe (Episcopal, Lutheran, Mennonite, United Methodist, Presbyterian, and Roman Catholic)" (Johansson and Bell, 2009, 283). Further, Lindenbaum believes that the CCM market in particular is targeted broadly at the group known as "White Evangelicals" who make up "25 to 30 percent of Americans or roughly 70 to 80 million people" (Johansson and Bell, 2009, 283). Part of the reason for this direct and obvious targeting is because many of the lyrics and fans of CCM share "evangelical Christianity's focus on the conversion of the unsaved" (Johansson and Bell, 2009, 283). Lindenbaum argues that The Great Commission to spread the Christian faith has spurred the CCM movement forward in ways through commissioning new media and technology in an effort to continue to convert people to Evangelical Christianity. CCM fans and industry professionals view mainstream music as un-Christ-like and therefore, have created separate media entities from the Christian Broadcasting Network to numerous movies and radio stations. CCM and its marriage to Evangelical Christianity is based upon a separatist movement that purposefully insulates itself from outside cultural influences and isolates its listeners, fans, and industry executives.

The CCM record industry was founded in the 1960s in the Los Angeles area by "born again hippies" that rejected the rigidity of the mainstream American brand of Christianity as well as what they viewed as the hedonistic cultural response brought forth by the Summer of Love (Johansson and Bell, 2009, 283). While largely ignored by mainstream labels, Lindenbaum argues that it was Amy Grant's 1982 success entitled "Age to Age" that propelled the the major labels to form imprint record labels that focus strictly in CCM. As such, artists that are able to bridge the gap and appeal to both the mainstream and CCM fans, such as Reliant K, are often released by two labels at once to make sure that the record has the authenticity to appeal to

both groups of fans. In Reliant K's case, their album "Five Score and Seven Years Ago" was released by Capitol Records for mainstream audiences and their CCM imprint, Gotee Records, within the CCM community. Given that the CCM genre has purposefully separated itself from mainstream audiences, mainstream labels and other outsiders are not received well, and thusly, it means that to get around the numerous gatekeepers within the CCM market, labels have to use a trusted brand name, such as Gotee Records, to break into the market with more mainstream acts (Johansson and Bell, 2009, 284).

Due to recent record label consolidation and buyouts, most CCM is owned and distributed by the four major labels with Warner Music Group, EMI, and Sony BMG controlling the majority. Universal Music Group, the remaining major label formed its own CCM label somewhat late, in 2006, and is only recently getting into the CCM market in earnest. There are many independent CCM labels though, including one that somewhat competes with Relapse Records (even though Relapse would never release a Christian band), entitled Tooth & Nail, who primarily release heavy metal and hard rock releases aimed at the angrier, younger, male members of the Evangelical Christian movement. In addition, there are a few larger metal bands that have Christian roots in their music including As I Lay Dying, who are one of the largest metal bands on the planet at this time.

According to data acquired by Lindenbaum, the top sales markets are unsurprisingly some of the biggest metropolitan areas like Los Angeles, Dallas, New York, Chicago, and Atlanta but the largest per-capita media markets for CCM are Omaha (Nebraska), Springfield (Missouri), Chattanooga, and Knoxville (Tennessee). Unsurprisingly, the areas with the highest concentrations of Evangelical Christians exist- primarily the American South and American Midwest (Johansson and Bell, 2009, 285). Given the high concentration of sales in the American South, many of the record labels are based in Nashville, Tennessee, in the heart of the American Bible Belt. Additionally, Nashville houses five of the six major CCM distributors in the country, allowing for easy access and working relationships between the labels and their key distribution partners - an ideal setup for any label in any genre (Johansson and Bell, 2009, 286). According to Lindenbaum, Nashville is also home to more churches than any other city in the United States on a per capita basis, making it the ideal place of centralization for the CCM community (Johansson and Bell, 2009, 287).

In recent years however, along with the major label buyout, there has been a change in the outlets where CCM is sold. Formerly, the genre was sold mainly in Christian bookstores, but now given the obvious popularity along with the power of major label distribution based in Nashville, CCM recordings are now primarily sold in secular retail outlets and "big box retailers" like Walmart, Target, and Best Buy. These retailers accounted for 64% of CCM sales in 2006, whereas 20 years prior, their presence within larger retailers was virtually non-existent (Johansson and Bell, 2009, 285). However, this big box retail shift has allowed the CCM genre to grow and expand from its previously bland reputation of being bland and "milquetoast" and into being more of an artistically expressive genre where there is less fear of backlash from more traditional members of the Evangelical movement and Lindenbaum cites popular screamo hardcore band Underoath as a prime example. Another great example which is not cited in the

literature but is equally relevant is the band ZAO, whose classic records were released by CCM label Tooth & Nail from Seattle, Washington. The artwork for “Where Blood and Fire Bring Rest,” arguably the band’s most classic album, features a man possessed by a demon shooting fire from both his eyes and mouth, which is something more traditional CCM would never have allowed when big box distribution was not an option in decades prior.

Another reason for the centralization of Nashville as the capital of CCM in the United States is the low cost of producing records in the city. With everyone based there, producers, labels, publishers, lawyers, session musicians, and agents, the city has such sourcing abilities that artists and labels are able to fund expensive projects at much cheaper prices there than if these entities were all geographically dispersed around the country. Given that Nashville is also home to the majority of the American country music industry, the CCM movement and country music genres have experienced somewhat of a crossover with major country stars landing on CCM album charts and traditionally country music record labels also now aiming at the lucrative world of CCM (Johansson and Bell, 2009, 288).

CCM radio has become another area of growth as Lindenbaum points out. In 1974 there were no full-time CCM radio stations and “even as late 1990, CCM radio networks and formats were rudimentary” (p. 289). That has changed in recent years because in 2007, the Gospel Music Association claimed that an astonishing figure, that over 20 million people in the United States listen to Christian/Gospel music every week and that the majority of them tune in to CCM, which has become the largest Christian music format. There are now over 500 CCM radio stations in the country with “an especially high concentration in the Upland South and the Midwest” (Johansson and Bell, 2009, 289). Further, the Christian radio audience expanded 43% during the period of 2000 to 2005 (Johansson and Bell, 2009, 289).

The rise of CCM has also led to a rise in live performances and CCM festivals. Multi-day summer music festivals are the linchpin in the CCM world and heavily skew younger by offering discount tickets to youth groups. These festivals surround the music with other Christian activities and speakers and are enormous. The Celebrate Freedom festival in Texas draws nearly one quarter of a million visitors, mostly young people, and the Creation festival in Pennsylvania draws 80,000. While these festivals are not necessarily held in hubs of CCM album sales, they do draw from all over the country as church groups frequently hire buses to attend the festivals en masse. Much like the “progeny of revival camp meetings, these music festivals feature explicitly Christian discussions, T-shirts sales, booths for radio stations, and tables for organizations such as anti-abortion Rock for Life and child sponsoring Compassion International” (Johansson and Bell, 2009, 291). These festivals become a “specialized arena for the expression and reinforcement of evangelical Protestant Christianity” (Johansson and Bell, 2009, 291). Therefore, the live arena of CCM has found a way to transform album sales into physical meetings and even pilgrimages from churches all around the country to see artists that share the same religious values as their consumer.

Lastly, Lindenbaum points out that “CCM has been depicted as a parallel industry or entertainment universe” and its geographic location in Nashville coupled with its sales patterns

reinforce that image (Johansson and Bell, 2009, 291). However, it is not separate or parallel to the secular music industry since many of the sales patterns, record stores, and marketing techniques are the same and artists are now becoming interwoven and crossing between the two channels more and more (Johansson and Bell, 2009, 291). According to Lindenbaum, the “secular/sacred divide is a socially produced marketing distinction” but this mere marketing distinction has had tremendous social impacts and reverberations throughout both the music industry as well as the general American populace at large (Johansson and Bell, 2009, 292).

Another chapter in Ola Johansson and Thomas L. Bell’s book, Sound, Society and the Geography of Popular Music, entitled “Local Music in a Connected World” and written by Sara Beth Keough discusses the connectivity that has made local music into international music through the Internet. Stating “one obvious aspect of the Internet is how the amount of available information has increased” (Johansson and Bell, 2009, 182), the author makes the case that Internet radio for “outside-the-mainstream music” like that of a label like Relapse Records, has increased the access to those types of music for the general population. While certainly true that Internet radio is quickly dying off, the concept remains the same as Youtube has become one of the largest places for music consumption in the digital world. Furthermore, Youtube now pays labels for their streams of songs, which is based upon advertising revenue, and given the sheer size of the volume of users, Youtube has become a serious income stream for many independent labels including Relapse Records.

Further, Keough claims that local scenes are not as prominent as they once were (Johansson and Bell, 2009, 183) and argues that things like the Seattle Grunge scene are a thing of the past and that these scenes have shifted to a digital geography from that of a physical one. While true to some degree, it has been the experience of Relapse Records and similar heavy-music styled labels that there is still something to be said for a label to pay attention to regional developments and movements within a local scene. As a semi-recent development of the early 2000s, Savannah, Georgia was a breeding ground for some of the best, most critically-acclaimed bands in hard rock for the better part of the last decade. For whatever reason, Savannah has spawned multiple bands that have gone on to international acclaim including Black Tusk, Kylesa, and especially Baroness. Baroness’ last record entitled “Yellow & Green” on Relapse Records debuted at #13 on the German Media Control Charts in July 2012 and debuted in the top 50 of numerous country charts during its first week and even finished at #30 in the US’ Billboard Charts. However, not only have these bands received international acclaim, but they all also share a similar sound. From the heavy riffing to the uptempo and active drumming to even the shouted vocal delivery, all the major bands from Savannah have a very distinct sound that labels like Relapse Records, Prosthetic Records, and Kylesa’s newest home, Marseille’s Season of Mist, have sought to cultivate and exploit for commercial gain.

In even more recent years (2009-present), Richmond, Virginia has been a hotbed for new bands from the subgenre called ‘doom metal.’ Doom is a slow, sometimes oppressively heavy-sounding subgenre that has seen a revival in recent years after its initial wave of influence from British bands like Black Sabbath and another Virginia-based band, Pentagram, had waned. Recently, Relapse has signed three Richmond bands, Inter Arma, Windhand, and Cough, all of

whom are beginning to receive international attention but none more so than Cough whom played the very prestigious Dutch doom festival, Roadburn Festival, in 2011, and 2013.



Cough "Ritual Abuse"

Needless to say, Relapse paid significant attention to the local scene in Savannah and is currently engaged in a A&R campaign to work with the brightest talent in Richmond at the current time as the overall goal of Relapse Records is to work with the best talent from each sub-genre of heavy music, regardless of where they are from, what particular style they play, etc.

That said, as Keough wisely points out in their discussion of Seattle, that physical place can become a branding tool. As Seattle quickly became shorthand for the preeminent bands from the grunge scene, Savannah and now Richmond are becoming shorthand, albeit smaller, more underground versions, of a branding tool for the respective sub-genres of music that are originating there. These places provide potential consumers, buyers at stores, and even distributors a quick advertising message that shows that since these bands come from a certain town or state, the music is of a higher quality than that of a band playing the same style but from another physical location, therefore record labels like Epic with the Seattle grunge movement (Pearl Jam) and Relapse with the Savannah heavy rock phase (Baroness) have emphasized place in their promotional messaging.

Unlike previous works in music geography, this thesis will focus less on the musical aspect (instrumentation, sound, etc) and more on the geographical focus of how a niche record label assimilates and develops in various countries in Europe. This will be a study of a business with a cultural angle. The baseline premise for the research will be that clearly the music that Relapse generally releases is very niche and rarely has broad-based appeal. Given that, how does a small US-based label understand the key cultural differences in music buying (if there are any) between Finland and the UK and then use those to benefit the business as a whole?

Are those norms changing? What outside influences may face the business in each market? Are those outside influences just national changes or are they international shifts?

Also, as a label that works to develop artists from early points in their career, it is important for Relapse to know what scenes are developing across the world. Using numerous trusted sources and friends, Relapse has to go out of its way to stay abreast of the best new music in an effort to still keep its brand reputation as an industry and market leader and one of the cutting edge labels that consistently discovers the best in new music.

Another music geographer, Adam Krims, who in his book Music and Urban Geography, analyzes the space and role of music in a city, Willemstad, Curacao, which is unlike this thesis since this thesis will analyze the notion of place on a national scale and assume that the entire population of a country has the same access to commodified music, which given the recent development of virtual online marketplaces like Amazon, Ebay, and Discogs, as well as online specialty retailers, they do to some extent. Of course there are gaps and some stores may not have each product and there is an obvious difference between shopping in a record store and shopping for records on a laptop at home, which should be explored by other music geographers. However, for the purpose of this study of Relapse Records and their goals as a multinational record label, the label is not as concerned with which individual stores in each individual municipality carry a product as much as they are concerned with making sure their products are available for purchase throughout the territory especially given that the media partners that a record label work with are primarily of a national scale as they are usually large magazines dedicated to the type of music Relapse Records releases. Therefore, the work of Adam Krims and his notion of urban place and space, especially on the development of the music community in Willemstad, Curacao is not truly applicable to the study of Relapse Records.

That said, in Music and Urban Geography, Krims does mention record shops and the commodification of a local style of music native to Curacao, the *tumba*, at one point when discussing a local festival held each year which is recorded, mixed, mastered, and then pressed to CD and sold at local record shops (Krims, 2007, 41). However, even this is not the same as what Relapse or most international record labels do as this style of music is indigenous and popular in one corner of the world whereas the stated goal of Relapse is to develop and cultivate artists and build their popularity throughout the world. Therefore, the big difference between the *tumba* and what Relapse does is firstly one of identifiable place. The *tumba* is easily identifiable with Curacao, but the music that Relapse releases is far less identifiable with a singular place insofar as it is far more ubiquitous and present throughout the Western world.

Later in his chapter on Curacao its capital, Willemstad in particular, Krims discusses the local development of the nightlife community and music community in particular. Surely, Relapse Records benefits from every urban area with a dedicated music nightlife community as music is still music, regardless of personal taste and the conscious societal push towards forwarding the arts can only help a media retailer like Relapse Records, but the city's own regional development fails to garner any truly tangible benefit for the label itself as the label is both too

small at the current time to potentially commodify anything in Curacao and its sphere of influence is primarily elsewhere on the global map, mainly Europe, North America, and the Far East. Therefore, Krims' study, while important to understanding the music culture of Willemstad, does not help in the geographical study of Relapse Records and similar Western independent record labels.

Another recent book by Robert Levine entitled Free Ride: How Digital Parasites are Destroying the Culture Business and How the Culture Business Can Fight Back focuses on the new digital geography that has dramatically shifted the overall structure of the media and culture businesses.

Levine's basic thesis is that as the geography for media organizations has shifted from brick and mortar stores and traditional revenue streams to online distribution, media generators have been set to fail by numerous factors including government and market forces that have dramatically altered the overall structure of the industry. Levine cites the Digital Millennium Copyright Act of 1998 in the United States as a law that has had detrimental and "unintended consequences." It was a law "that media companies first championed and technology companies managed to manipulate into a compromise that undermined the market for media online from the very beginning." Since the law "protected internet service providers from liability if copyrighted works were transmitted over their networks" the law "enabled a culture in which online companies like Youtube can benefit from uploaded music or video as long as they remove it when asked" (Levine, 2011, 10).

Levine's basic argument is that "the Internet was supposed to empower creators, corporate and independent alike," (Levine, 2011, 7) but content providers like record labels are being systematically scammed by companies that are trying to devalue their work and products in a steady march toward the overall goal of content and information being free though those technology companies have not figured out that the second content is free, there will be no revenue to pay for people to produce the content. Levine says "no company has made a significant profit distributing music online except maybe Apple...This isn't creative destruction; it's the destruction of creativity" (Levine, 2011, 11). Levine compares the internet "parasites" (Levine, 2011, 6) like Napster and file-sharing companies and even Google and Youtube to people that believe that "people once paid \$15 for silver plastic discs" versus people that saw the work that went into the creation of the disc from recording to mixing, mastering, and production (Levine, 2011, 5).

Levine states that "music sales are worth less than half what they were in 1999" early in Free Ride (Levine, 2011, 2) and then cites an April 2010 study from the United States Government Accountability Office (GAO), "which has a reputation for producing neutral studies" (Levine, 2011, 109) and noted that the GAO concluded that "it is difficult if not impossible, to quantify the net effect of counterfeiting and piracy on the economy as a whole" (Levine, 2011, 109).

Much of Levine's book paints a dark, scary picture ahead for the media and cultural business models. The book does outline some suggestions for the culture business as a way to strike

back against the “digital parasites” as he calls them, but overall, the book fails to address the future of the music industry. Levine argues for crowdsourcing and says that strengthening copyright laws are the major keys, but in music’s case, it is harder to see the future. As more brick and mortar stores close and digital revenue becomes the dominant revenue stream, labels will have to further streamline their operations as digital income means pennies to a label where physical income brings dollars.

Overall, Levine’s thoughts are relevant on a grand scale but fail to address the music industry’s woes in the same way it can address the movie industry’s problems as a consumer can’t simply download a night out at a movie theater the same way that they can illegally download an album. Additionally, Levine fails to make any suggestions for smaller players in the industry like independent labels that really stick outside of lobbying the United States’ Congress and European legislations to stiffen copyright law which given the income these companies generate on a year-to-year basis, amounts to peanuts compared to Google and other online distributors generate from their business model of utilizing copyrighted material that they do not own to generate a profit. In the end, Levine’s basic conclusion is very structural in nature. He doesn’t come out and outright make the suggestion, but the implied solution for independent labels according to Levine is to rely on the larger players, the major labels and larger companies like Sony and Warner Bros. to lobby for legislative change and hope that it happens as they will receive the same benefits from the potential changes. Levine argues that without major structural change and swift legislative action from governments throughout the world, the creative industries as we know them are doomed to collapse, devastating both industry employees, artists and other creatives, as well as fans alike. .

Methodology

The methodology of this study is multi-faceted and multi-tiered. Taking into account the current debate, and acknowledging and building off of the work of previous music geographers, the study will discuss their findings in relation to Relapse Records and labels in similar economic situations.

First, it is important to understand the notion of poststructuralism and poststructuralist thought. The notion of poststructuralism sees a return to the “first philosophy” or the ontological question of being. What it means to be and how ones experiences shape their world view. Poststructuralist thinking argues that meanings and identity are effects rather than causes and the philosophy takes care to argue that not all experiences are the same, so there needs to be a level of understanding of all view points since the world effects different people in different ways, leading to differing views and opinions, none of which are necessarily more correct or less correct than any other (Aitken, 123-135).

Further poststructuralism takes into account both historical views and experiences as well as ethical demands to argue the approach. The poststructuralist approach does not seek to uncover the origin of historic actions however, just what happened (Aitken, 123-135).

In addition, the notion of Jacques Derrida's "Deconstruction" which analyzes every aspect of a relationship to look at the power structures and struggles is important to note in this thesis. Farmer compares deconstruction to "x-raying a painting to reveal underlying pictures." While Derrida primarily used deconstruction to analyze political events and relationships, much of the business world is political and key for any and all happenings in relationship to Relapse Records (Farmer, 1997, 13).

Modern thinking has rejected structural thought as not factoring in history and positivistic thought as not arguing enough for ethical concerns and "critically affirms our uncanny lack of foundations and essence" (Aitken, 2006, 132).

Armed with this poststructural viewpoint, interviews with key media were conducted including magazines and radio hosts, as well as distributors in each of the examined markets: the United Kingdom and Finland. These interviews will be conducted to discover local insights offered by each market and get a very in-depth perspective on the local market within which Relapse Records operates. The professional opinions of numerous members of the media as well as members of the distribution companies that Relapse works with will help provide a ground-level perspective on the inter-workings of the music scene and music-buying habits of local residents.

Given that these journalists and music distribution professionals are on the ground and experience their countries in a far different way from a label from a distant country, it is important to understand that while these people are the local professionals, many of them are business partners of labels like Relapse as they need music to distribute and artists and content to cover. Therefore, their opinions will be somewhat colored by their economic needs versus those of a pure music fan that benefits in no way aside from the enjoyment of the music they purchase, download, or stream. However, the major difference there is that the music fans often do not understand the structure of the business nor anything about the business aside from that they like the music, let alone individual record labels.

The poststructural framework will be taken into account throughout this thesis, looking at everything from how marketing is conducted to the way the business is run as a transnational corporation. Dicken's poststructural approach to economic geography will be incorporated when looking at the relationship of the company to consumers, suppliers, and the global production network. In addition, realizing that consumer taste, market structure, and touring will also play a role within the success of the label, an analysis of the history of each band and the genre within which they play in the local market will be discussed as well.

Further, the project will analyze hard internal and confidential data provided by Relapse Records. The data will be derived from the sales statements given by both Relapse's exclusive UK and Irish distribution partner (ADA/Warner) as well as Relapse's direct sales via their online store. These numbers encompass all physical sales activity within the territory covered by ADA/Warner which is the whole of the UK and the Republic of Ireland and all direct-to-consumer sales made by Relapse Records, which they are contractually allowed to do according to their

agreement with ADA/Warner. In addition, all iTunes sales will be presented as they were handed directly from Apple to Relapse Records.

The Finnish numbers will show that Relapse has used two different distributors in Finland during the past few years, Supersounds and EMI. Relapse, under my personal leadership, moved from Supersounds to EMI because Supersounds was too small a distributor to appropriately distribute Relapse's product in Finland since Antilla, the biggest brick-and-mortar chain in Finland, refuses to buy from a smaller, independent distributor. However, unlike most larger distributors in big territories like the United States or Canada, Finland is still small enough that a larger distributor like EMI is still able to reach all the independent stores that Supersounds was able to reach, therefore, the move just to ensure that nothing changed except that Relapse was able to add the single largest account in the country to its distribution network. This is not always the case as sometimes larger distributors miss the smaller stores. Therefore, the numbers from Finland are a combination of two distributors plus Relapse Records' direct online sales and iTunes sales numbers, the latter two which are retrieved in the same fashion as their UK counterparts.

This hard data will help to show the current trends in the industry and will likely show that sales are dropping across the industry although no two records are alike. Therefore, some records may do better than others but the key point is the overall trend line which is likely headed in a negative direction for physical sales and moving northward for digital sales.

This solid background of both qualitative and quantitative data gives credibility to all results and recommendations.

Results

This section will analyze both the total sales for the Relapse in physical in digital formats, but also will consist of some qualitative information from key people in music industry sales, journalists, and other experts from both Relapse Records as well as other record labels that operate within the same subgenre. This section, for lack of a better term, will be deemed the **Marketing and Business Results** section.

In addition, given that the music that Relapse Records puts out, the lyrics and bands and their personal origins and songs all have some level of geographic angle, and this thesis will explore some of those angles and how they impact each of the two countries studied. This section will be deemed the **Creative Content** section for each country analyzed.

Marketing and Business Results

United Kingdom and the Republic of Ireland:

The United Kingdom and the Republic of Ireland are tremendously important markets for most independent music labels and certainly Relapse Records is no different. Not only is the UK and

Ireland the only major English-speaking market in Europe, but it is also one of the largest markets for music consumption and production in the world. According to a 2005 study reported on by the BBC, the average Briton purchases 3.2 CDs per person per year (BBC, 2005, <<http://news.bbc.co.uk/2/hi/entertainment/4371673.stm>>).

Understanding the unique complexities of the changing and demanding UK market is absolutely key to Relapse Records' success within the marketplace, which is clearly a voracious market in terms of music consumption.

As expected, London is undoubtedly the epicenter of the music industry within the United Kingdom and also within Europe. From recording, to production, promotion, distribution, and concerts, London is at the heart of all things music within the UK. Within nearly every genre of music, London is at the epicenter and in heavy metal it is absolutely no different. London is a truly 'world city' unlike few other cities and easily has more of an impact on the music industry than any other city in Europe.

In London alone nearly, if not all all, key English language magazines are based within the city limits: Metal Hammer and Classic Rock of Future Publishing, Kerrang! of Bauer Media, Terrorizer Magazine, Rock Sound magazine, and Zero Tolerance magazine. Also, key websites for music such as The Quietus, which is the United Kingdom's answer to the United States' Pitchfork.com, are based in London. The close geographical proximity to all key media makes London a tremendously important location for any aspiring artist or act to play on any and every European tour they do. Without London, no European tour for any band or artist is complete and that artist has missed a tremendous promotional opportunity.

While other magazines are based outside of London, such as Molten Magazine in Dublin which focuses on metal exclusively, or Rhythm magazine (also published by Future Publishing) which a drum magazine run out of Bristol, there is no where else in Europe that draws the same level of attention to music as London.

In addition, all the major music distributors and chain stores are based in London or the London-region. Relapse Records' distributor, ADA/Warner is based in southwest London and sells to the major chain in the UK, HMV, whom are also based in London, alongside numerous other accounts, both online and brick-and mortar.

To understand the buying process, we spoke to two experts within the UK from two of the leading distributors in the country, both of whom Relapse Records has a working relationship with: Christopher Parkes of Plastichead Distribution, Ltd and Gary Lancaster of Warner Music/ADA. Both Parkes and Lancaster handle distribution for not only Relapse Records, but also for other larger independent heavy metal labels including contemporaries Season of Mist from Marseille, France and Earache Records, based in London among others.

Christopher Parkes handles all licensed Relapse Records' shirt designs for not only the United Kingdom and the Republic of Ireland, but also for the rest of Europe as well. Merchandise is

very important for some genres and heavy metal in particular as the fans can usually be identified by their attire as heavy metal fans. Speaking with Parkes, he remarked how the United Kingdom buyers at chain stores “are very London-centric and it’s to their detriment. For example, the buyers at HMV just don’t get it. HMV just doesn’t get it. Music is becoming more local everyday and in Wolverhampton, there’s a very core fan base of diehard metal fans whereas in Scotland, there’s virtually no presence for the genre at all. There’s no fan base up there.” (Parkes, 2012) .As such, one of the problems for distributors like Plastichead is that HMV still centrally buys which means that all the stores stock the same products and there is no consideration for local scenes or local interests when it comes to big box retailers like HMV. Parkes believes this general disinterest in the local drives shoppers to local record stores insofar as they still exist, and failing that, to online retailers like Amazon, which control the largest bulk of the volume at this point anyway. “Worse yet,” Parkes remarked, “every time that HMV drives a customer away, they go to Amazon, which only hurts HMV more, as well as record labels more because as Amazon continues to grow in market share, they control what types of prices they pay and discounts they receive, meaning that less money flows to the label with each sale made (on Amazon” (Parkes, 2012).

Parkes highlights one of the major problems in the UK regarding distribution: ill-informed or uninformed buying habits by buyers stores, whom essentially and traditionally acted as gatekeepers for the music buying public. Therefore, even if Relapse Records were to deliver the goods at the right price at the right time to the distributor, if the distributor can not convince the buyer to take the product in or place it in the right stores where the local market is looking for their niche product, Relapse Records’ promotional efforts will essentially go to waste and the product will potentially go unpurchased, returned to the distributor, or worse, unordered meaning that it just sits inside the distribution warehouse and not even available for public sale.

Speaking with Gary Lancaster, whom handles all physical distribution of all Relapse Records’ music product (CDs & vinyl) throughout the United Kingdom and Ireland, Lancaster highlighted many of the same things. “While the UK as a whole has different pockets of interest for (Relapse Records) and other heavy metal labels, the whole country reads a few select magazines and a few select websites so those are absolutely key for the entire market and those are all based in London” (Lancaster, 2012). Therefore, Lancaster feels that yes, music is becoming more local in some sense in the UK, but that London is still the gateway for all music that eventually does filter down to the individual and to individual localities.

Lancaster and Parkes’ responses to the UK’s interest in Relapse Records begs the question, why is London so important to the success of Relapse abroad? As earlier stated, all the magazines are based in London and key buyers are based in London but the customer base according to market experts is not primarily based in London but scattered throughout the UK and Ireland.

It appears that there are structural forces at play so we reached out to Jonathan Selzer, deputy editor of the single most important and widely read heavy metal magazine in the country, Metal Hammer. In addition, Selzer is the former editor to Terrorizer Magazine, which is one of the

most respected metal magazines of all time among heavy metal fans. Terrorizer was, by all accounts, at its peak in the early 2000s when Jonathan ran the magazine and has fallen somewhat into disrepair since he left to work at Metal Hammer according to labels, fans, and even some anonymous writers whom I spoke with.

Speaking with Jonathan, he stated, “Yes, there are definitely a large number of structural forces at play though we do have some editorial control over what we write and who we cover. I wish it could be that we only focused on what we like, but, if you take my taste, we would never sell any magazines or subscriptions (laughs). Of course we have to pay a lot of attention to bigger bands and bigger labels like Warner, EMI, etc because they have much more capital to spend building their artists and spend a lot more on advertising and are developing new bands in a much more, in-your-face public manner. While we certainly have to cover those bands, especially being part of a large company like (Future Publishing), we do have some discretion in what we cover so we can give some attention to smaller bands on smaller independent labels. Do I wish we could spend pages on incredible bands like Royal Thunder or Indian? Of course I do, but the sad truth of it is that we can’t since covering Royal Thunder won’t meet our circulation numbers while covering Slayer and Black Sabbath and big, newer bands like Slipknot will” (Selzer, 2012).

Given Selzer’s words, it’s clear that Relapse Records is simply too small an entity to change the structure of the entire promotional landscape within the most key magazine in the UK, so how does Relapse operate within the landscape? Well, according to Selzer, the key is to “Keep releasing music from great bands that are simply too good to go uncovered as it would make us look out-of-touch and separated from the latest trends or shifts within the genre.” As evidence, Selzer points to a five-page feature he ran on Relapse recording artists Royal Thunder in the June 2012 issue of Metal Hammer. “That band (Royal Thunder) is just simply too good and truly groundbreaking. Bands like that force the hand of big publishers and magazines and no matter how large or small a band you’re publicizing, the magazines that rely on paying attention to trends and ‘keeping their ear to the ground’ so to speak, will pick those up for coverage” (Selzer, 2012).



Royal Thunder "CVI" cover art

However, there are other ways to enter the collective psyche besides signing “groundbreaking” artists that simply do not come along everyday. Selzer continued, “Relapse is still a priority label for us at (Metal) Hammer. While we perhaps don’t have ten pages of editorial, (Relapse) knows it gets coverage on priority releases in print. However, print is only one way we can reach our audience so we dedicate a lot more coverage to smaller labels and younger, up-and-coming artists online and on our iPad version of the magazine...Digital is becoming an ever increasingly important part of the media mix, even for magazines whose print runs are somewhat dwindling as phones become ‘smarter,’ and a wealth of information is available in real-time. Music news is now not delivered on a monthly basis but on an hourly basis” (Selzer, 2012).

Selzer is correct. Music news, even in the past 10 years has dramatically changed the way that Relapse and other record labels used to do business. Relapse used to put out a mailorder catalog that was branded as a magazine called “Resound.” The magazine was tremendously powerful as it was, at that time, the only “metal” music catalog that was sent to every household around the world that had purchased an item in the past decade from Relapse. Even Nuclear Blast in Germany was not sending a magazine around the world and they had (and still do have) the biggest heavy metal mailorder in the world. The editorial section featured articles on Relapse artists, blurbs about Relapse staff members, and provided quarterly “breaking” news to Relapse fans while the latter three-quarters of the magazine was a catalog of all available items for purchase from the Relapse Records mailorder. Relapse ceased production of Resound in the mid-2000s as its return on investment dropped and the industry began to harness the power of the Internet and began to focus news towards online sources that brought more immediacy. As public adoption of the Internet continued to improve, Relapse had to adjust with the changes and, as a result, Resound ceased to exist.

When pressed about the relevance of comparing Resound with the modern metal magazine industry, Selzer diplomatically responded “The magazine industry has had to adjust must like Relapse has.” Asking what has changed, Selzer opined, “We used to dedicate a large section in the front of Metal Hammer and Terrorizer for that matter to music news and concert reviews but those sections have all gone digital. Concerts in London are a daily occurrence, so waiting a month or more to publish how some band was great live just simply does not work anymore. People use social media for that stuff and the immediacy of the Internet has forced us to alter what we present and how we present it. The name of the game now is “exclusive content” for the magazine - getting your hands on things that no one else has gives us a competitive edge and still makes people want to read our magazine” (Selzer, 2012).

Responding to a question about the importance of physical product, Selzer agreed, “Yes, the physical product is still very important. Less so to people under 25 years of age or so, but if you’re a bit older, you remember when the only option you had was the magazine and there’s something both very nostalgic and important to our older readers. When you’re reading a magazine that’s well written and well presented on a topic you love, all is right in the world....And at the end of the day, magazines drive distribution for record labels and success of certain bands and the failures of others just as much as their record labels do sometimes” (Selzer, 2012).

Ola Johansson and Thomas Bell’s point about scenes comes back into play here. Scenes and the promotion of scenes like the Relapse Records-Savannah, Georgia connection is so important because location again drives magazines since the writers and editors of the key magazines are so inundated with material that location branding may help get a band a listen or a moment of attention that they may otherwise never have received. Small labels and small bands need every ounce of branding and marketing power they can get when confronted by the structural realities of the industry and especially the print and digital media. In both arenas, all bands and musicians, both smaller and larger, need to exist but the potential to be overshadowed by the ever-present and ever-looming larger forces as a small band can be insurmountable no matter how brilliant a record may be or how hard a small label may push.

Knowing that structural forces may eliminate coverage for smaller bands is important for Relapse Records and all smaller labels that are working to develop new talented artists to know and understand. This means that Relapse has to work to cultivate awareness of the burgeoning local scenes of their new and developing artists as a way to leverage against the structural forces of the industry as a whole. Therefore geography and physical place are paramount to Relapse’s success with new artists and can be key factors in breaking down some of the structures surrounding the industry.

While geography can be an important marketing tool, Selzer, gets to the heart of the issue as to why London is so central to everything in the UK. The structure of the large majority of the entire industry, in its current state within the United Kingdom, is based in London. At the same time however, this is changing for as Chris Parkes reminded us that “music is becoming more

local everyday” (Parkes, 2012). In its current state, record labels sign bands from around the globe that they believe in, then invest in the band in terms of recording, advertisements, and try to court press which is nearly all based in London in the UK.

So yes, while Chris Parkes and, to a lesser degree, Gary Lancaster see the importance of the UK as a whole in terms of actual product being sold and think that both secondary markets like Manchester, Bristol, and Dublin are of absolute importance, Jonathan Selzer sees that the industry, as a whole, starts in London though this may simply be given the nature of each party’s role and position within the industry. Selzer’s perspective is that the opinion and profile makers are in London and the rest of the territory follows London’s lead as such and surely Lancaster and Parkes would agree with that.

Like all industries, sales are a function of proper marketing. From the actual aural product, to its packaging, to the advertising and public relations surrounding a release, marketing is the key to the success of any band. Assuming that the packaging and actual aural product of every release is equally strong though this is never the case and Relapse rarely, if ever, forces changes in packaging and NEVER has made a band re-record, the key to driving a record into market is complete press and advertising coverage. No matter what label, especially a label the size of Relapse Records, needs proper coverage to force stores throughout the United Kingdom to offer the record to customers. However, there are only a few magazines that matter for the buyers at each account and they all are based in London as discussed above. Therefore, if the media structures ignore a record, its likelihood of success is greatly diminished, if not a complete death knell of the album’s commercial viability within the United Kingdom.

Asking Lancaster about the changing structure of press in the country, he remarked, “Unfortunately, online press doesn’t matter to the key accounts like HMV. They don’t view it as real press since every label can get some guy with a blog to write about a band. They need to know that if they take a product in, that there is a good chance it will sell and therefore, they look only to the major music magazines” (Lancaster, 2012). So this circles back to the importance of London. Without London and the key press people there, potential customers in Dublin, Manchester, and Birmingham can not get the record in physical stores without proper press coverage that comes out of London. The only places that then take in Relapse product to sell are boutique heavy metal and indie stores and that limited availability in the physical marketplace is simply too limited to make up the budgeted expenditures for Relapse in the UK market including advertising, shipping, press, and personnel costs.

However, Amazon has become the one vendor of physical product that pays attention appropriate attention to online shoppers of physical product. Part of the reason can certainly be traced to the Amazon’s unique ability to understand that online news and positive online reviews means potential for immediate sales. According to Lancaster, “There is no other vendor in the UK that gets ‘it.’ They’re the only ones who understand the importance of the online media presence and it shows....They make up about one-third of ADA’s overall physical distribution sales and that number keeps growing as stores continue to change their physical layout and bring in less-and-less music” (Lancaster, 2012). Amazon surely has an advantage over HMV

and other brick-and-mortar stores that are trying to build an online presence. From its advanced starting position, to the lack of overhead and ability to take in far more products, Amazon has become such a force in physical distribution to the point where Relapse and other labels are now required to offer them a specific additional discount of 15% off of the advertised dealer (wholesale) price that no other retailers receive. Unfortunately, for labels like Relapse, as Amazon's market share continues to grow, that required discount will continue to grow as Amazon will have ever increasing leverage over its suppliers (record labels), but given the structure of the industry, there is little that Relapse Records, as a single, lone independent label will be able to do at that point.

Digital Distribution

Digital Distribution is an entirely different animal than physical distribution. iTunes, throughout the world, continues to dominate the marketplace with "nearly two-thirds of all music sales" (Daily Finance, 2013, <<http://www.dailyfinance.com/on/apple-itunes-anniversary-music-industry/>>. Chris Parkes from Plastichead earlier mentioned how "all music is local" and in the digital world, Parkes is correct (Parkes, 2012). Since the coming of the Internet age, music has been changed from something only heard on radio or through friends or tape-trading to an instantaneous experience that anyone can have if they are in front of a computer, iPad, or smartphone.

The structure has somewhat altered the power structure between the distributors and the independent record label. Prior, Relapse and other labels were purely at the mercy of magazines and word-of-mouth for publicity, and large distributors for wide-scale distribution throughout various territories. The advent of the Internet has changed the nature of publicity and labels can use social media and various other websites to promote new artists and build the profile for both artists as well as label. In addition, and far more importantly, the Internet has removed the barrier between the label and the fans and allows for instantaneous purchase from anywhere in the world via iTunes. In Relapse's situation, they administer their own iTunes worldwide, which means that the full price of the song comes to the label minus iTunes' standard 30% distribution fee. This is a very good business move by Relapse as if Relapse's physical distributor in the UK, ADA, administered the digital distribution, they would take upwards of 20% of the remaining 70% of the initial purchase price, meaning that Relapse would get only 50% of each unit of currency spent versus the current 70% they receive now.

Relapse's iTunes structure means that they are better able to monetize their product through the most important digital vendor on the planet and reaching their audience in real-time without enduring numerous costs including product manufacturing and shipping that eat into the bottom line of each record. However, as per older contracts that labels have signed when there was no such thing as digital distribution, including Relapse, digital distribution has fallen under 'licensing income' since the record was licensed digitally to another vendor to distribute and exploit. This means, unfortunately for the label, that the older artist is paid far more on digital income since licensing income has traditionally been split in the industry between the label and the artist 50/50. New contracts now, of course, specify digital income, but the older contracts

mean that catalog artists are able to see more money in royalties from iTunes than they generally have through physical sales. While great for the artist, this cuts drastically into the profit margins for record labels on catalog titles, which traditionally, have been the economic engine of any record label since sales on non-promoted titles mean higher margins while new titles with tons of promotion are not nearly as profitable in the short-term but turn profitable later in the album cycle. The scenario of an independent label being able to reach their market en masse without a middleman has been sought after by labels for years as evidenced by the presence of their own mailorders and iTunes has provided a way to reach any person with an Internet connection at any moment, but the medium has made the issue somewhat of a mixed bag for labels given the serious cut in profit margin, but also the cut in man-hours expended to reach that market.

Therefore, in either scenario in the UK, Relapse has some ability to make self-sustaining choices as an individual actor, but at the same time, are very much constrained by and subject to massive structural changes in the industry. From the digital side of marketing their goods, the label itself is subject to the whims of consumers in relation to iTunes and Apple's product. If Apple were to change the price or change their distribution fee, Relapse would have little leverage in saying 'no' as iTunes is simply too powerful a vendor to cease a relationship with since they are the largest digital music vendor in the world. At the same time, Relapse is subject on the physical side, to changes in store vending space, buyers, illegal downloading that hurts the physical market, a fickle and overworked press based in one small part of the UK and Ireland, and other general market forces that mean that physical product alone would be suicide for the label. However, given the importance of both to Relapse, analysis of empirical data will help Relapse dictate where best to allocate future resources in the UK. Should Relapse continue to pay the most attention to the large publishers that dictate the new music in print or should there be a shift away from those large-scale publications to smaller, web-based mediums that would signal a seismic shift in the way that Relapse conducts business and markets and sells its product within the territory?

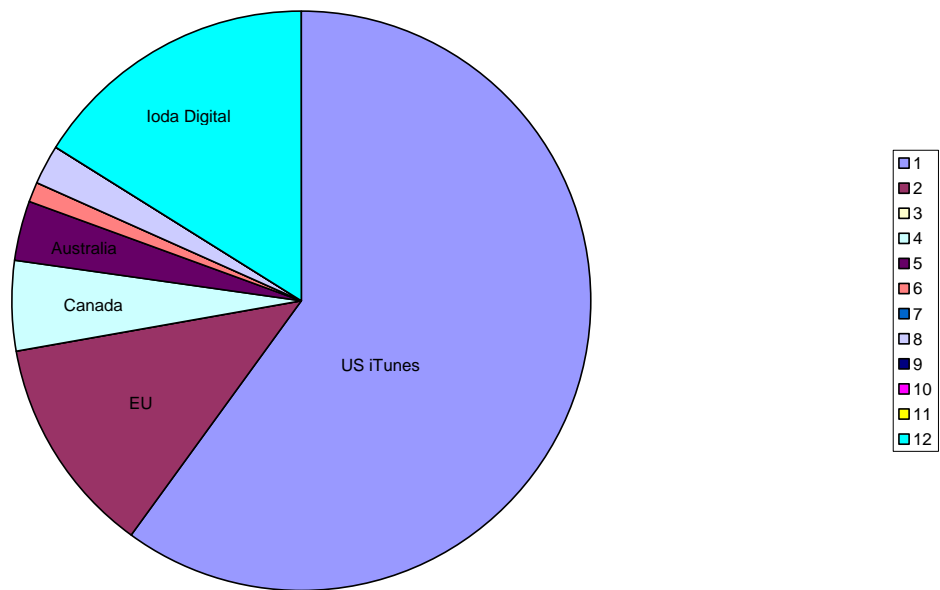
These questions are essential to understanding how Relapse continues to operate within the UK and the Republic of Ireland so a 2-year company-wide analysis of all physical sales and iTunes was conducted to get a full grasp of Relapse's income in the territory. This data is from the previous two calendar years of 2010 and 2011.

Immediately clear upon delving into the information on physical sales is how key to the company the United Kingdom and Ireland are and further, especially how key ADA, Relapse's distributor in both countries, is to Relapse's long-term success in the region. ADA is responsible for over 90% of all physical sales into the territory for Relapse, which is a simply shocking figure that few other distributors can match, especially given the robust online presence that Relapse has which accounts for most of the remaining 9.25% of physical sales in the United Kingdom. Irish direct sales via Relapse.com and to small wholesale accounts total a mere 0.9% of all total sales for the company and are largely negligible.

2010-2011	Total Physical Units	Share of Sales	Total Physical Unit Income	Percentage
UK & Ireland	25,444	100.00%	\$309,934.97	100.00%
ADA	23,347	91.76%	\$278,851.43	89.97%
UK Direct Sales	1,865	7.33%	\$28,424.94	9.17%
Irish Direct Sales	232	0.91%	\$2,658.60	0.86%

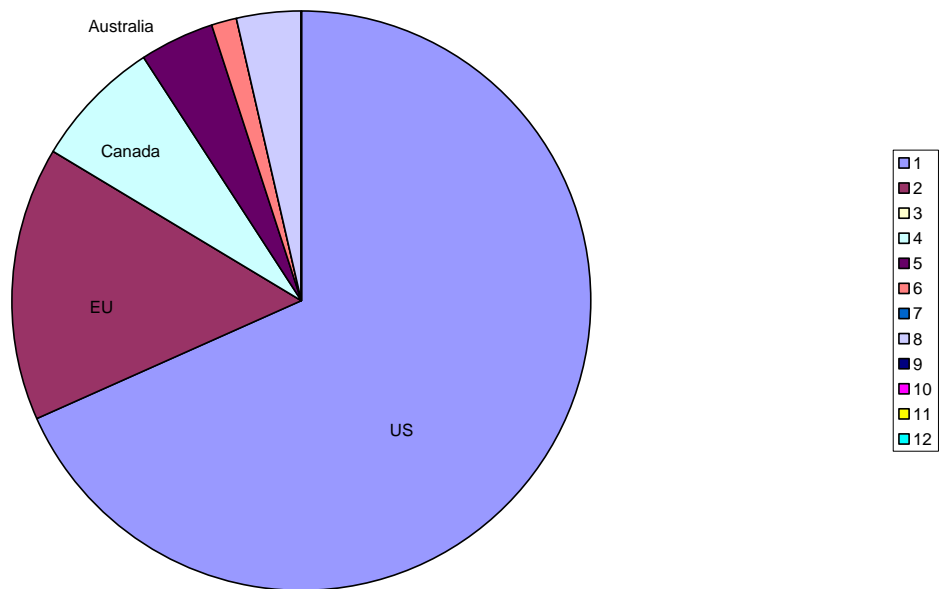
The UK is also key to all iTunes sales as Europe was only a small portion of the overall worldwide sales, equaling roughly 12.16% of total worldwide revenue. Of that 12.16%, the UK and Ireland accounted for all 46.5% of all net income generated from iTunes sales in Europe and 52.5% of all unit sales during the same time frame so without the UK and Ireland, the iTunes sales would have been far worse for the company. It is quite obvious that this is an area to grow the business.

Percentage of Digital Sales during 2010 (iTunes unless otherwise marked)



In 2011, the UK meant roughly 4.6% of Relapse's total iTunes revenue with a total of 22,666.27euro. However, that number is made more substantial because the United Kingdom made nearly 67% of the entire continent's iTunes revenue, which is 15.29% of the company's total iTunes income. Therefore, the United Kingdom has been the linchpin in digital sales across Europe as it is far and away the biggest consumer in the largest digital distribution marketplace.

2011 iTunes Sales as a Percentage



Given the sheer levels of income, there really is no comparison as to the importance of physical distribution versus iTunes and other online sales. The physical distribution income is so much greater than iTunes sales even with the added costs of shipping, customs, and the distribution fee. Therefore, Relapse has to continue to work within the structures of the industry. The numbers indicate something far different than the standard “the music industry is dying” storyline perpetuated by outsiders, analysts, music fans, and so-called experts. The numbers brought in from the new digital medium’s biggest online store, iTunes, utterly pales to that of the industry’s existing infrastructure that has worked well for nearly a century.

Also, given the iTunes numbers, it is clear that the United Kingdom has been the fastest country in Europe to adopt iTunes as a saleable medium since the country made up 46.5% of the income generated from the European Union. However, the numbers are simply not enough to sustain a business the size of Relapse but act as merely a secondary form of income.

Therefore, Relapse Records has to continue to operate within the long-standing structure of the music industry as the label is simply too small to create its own structure. The post-structural model cites large structures that individual actors have to operate within, almost as if they are boundaries or controls. However, within the model, there is some ability for individual actor to take some actions to change their situation in light of the structures and that every individual entity’s experience is different and that different shapes their perception of the structures, the marketplace, and all other experiences. This begs the question, what can Relapse do to further build their market share and presence within the United Kingdom and Ireland given the large, long-standing structures of the industry?

According to Gary Lancaster and Laura Moat at ADA, one area of possibility is to try to further build their iTunes presence since, according to ADA's highly confidential market data, the consumers that buy on iTunes are different people than those that buy physical product in stores or through online stores since they place less value on the extraneous parts of the product like packaging and cover art and more value on the convenience of just having the music and its portability. iTunes consumers look for convenience and physical consumers are more traditional and tend to be long term, committed music consumers.

Given that iTunes is "all about convenience" according to Moat, it means that Relapse has some opportunities for movement within the structure of the industry (Moat, 2012). The market opening is in the area of convenience so Relapse has to identify ways to make their digital product line more accessible and easy to find for potential customers on the massive library that is the iTunes catalog. Unfortunately, this is not very easy as prices are somewhat fixed and the largest artists like Adele and Lady Gaga are those that are given the prime, featured slots on the iTunes store front since they are far more likely to result in large numbers of sales given their accessibility and the major label promotion budget behind those artists. Therefore, the label is again somewhat constrained by the structures of the industry as well as the structures of what is popular among the general populace.

One option, though expensive, is to offer a free promotional sampler of a variety of different Relapse artists on iTunes. Both convenient and free, it would be a way to work with iTunes whom would surely promote the sampler since it could result in additional sales to iTunes consumers that may have not heard a particular Relapse artist before. While yes, the label would essentially be giving away its product for free, it would be a limited time offer and would reach both old fans that prefer digital product as well as potential new consumers. Unfortunately, these sort of expensive steps are some of the only ways that smaller independent labels like Relapse can break through the crowd and reach new fans and broaden their market base in the digital world.

However, in the physical market, Relapse has many, many more options to expand their reach and appeal. The first decision that has to be made is how to approach the market. Does Relapse want to go through the largest channel, which is ADA or through smaller channels like their own webstore? ADA offers more structural limitations from both a financial perspective as well as customer limitations. If Relapse were to decide to attempt to reach new fans and markets with ADA, the product offerings would be subject to the 20% distribution fee that ADA charges off of the wholesale price-per-disc (PPD) plus the title or titles would be subject to returns. In addition, whatever potential title broad-based title Relapse decided to sell would be limited in terms of packaging since the title has to be 'rackable' meaning that it has to fit in the store shelves at HMV and other major stores. This limits creativity in the packaging and can potentially limit the eye-catching nature of a product that is among a sea of thousands of other releases in music stores. However, there is little need for advertising expenditures aside from 'co-op advertising' which is a music industry term for point-of-purchase advertising. Therefore, there is less of a risk given the relatively inexpensive nature of the point-of-purchase, so the

major costs would mainly relate to the creation of the physical product and shipping the physical product to ADA to distribute around the country.

Even further, there are options within the physical world of ADA, such as identifying particular retailers that are friendly to Relapse product, and using market segmentation tools, ADA could assist Relapse in finding how to best reach consistent, long-time fans alongside outsiders that may be interested in Relapse product but have yet to hear a single Relapse band. Individual stores like Rough Trade in London or the chain, Play, which skews younger with its dual focus on videogames as well as music and movies may be good options for a particular broad-based outreach and consumer awareness campaign.

Another option, which provides potentially a far greater reward, but also increased risk for Relapse would be to create a truly unique introductory package that would be available exclusively on Relapse's webstore for shipping to the United Kingdom. This would allow greater flexibility in terms of product design and creativity and blowing past the United Kingdom's traditional structure of London-based distributor ---> store ---> customer but would mean increased costs in a variety of areas. First, costs in production would be higher given the production of a 'non-traditional' package. Marketing costs would also be higher given the need to alert potential consumers so print, radio, and Internet ads would also add to the bill and not necessarily add certainty to the sale of the introductory product. Lastly, and most expensive, in order to get true reach in the UK, Relapse would have to offer free international shipping from the US as Relapse's Dutch office is merely a fulfillment company for large-scale distributors and does not have the capacity in its current state to ship out potentially thousands of orders to the United Kingdom. According to Greg Alexander, Relapse's shipping manager and an expert in international logistics with nearly two decades in the shipping industry, a package that is roughly one kilogram headed from Philadelphia, PA to the United Kingdom would cost approximately \$8 at current company rates as of December 2012. That cost, in addition to production costs could potentially make any market development product originating out of the US office simply too expensive for a label the size of Relapse since introductory products, due to their nature, generally have to be cost effective for consumers in order to get them to take a chance on a new product that they may or may not like.

However, the positive side, of this is that each order means more direct money to the label as well as email addresses for potential direct sale customers, thereby building the mailing list further and continually broadening the reach of the company and potential for upselling of additional items.

However, it is very clear just from this exploration of a potential market opportunity in the United Kingdom that Relapse is still very much constrained by market forces. Be they the traditional music industry structures of magazines, distributors, and stores, or structures rarely thought of by fans or inexperienced music industry professionals such as shipping costs and customs charges, Relapse Records does not, and will never, be able to operate in a vacuum where the company is not dependent to some degree on larger, more entrenched social structures to continue operations and potentially grow and expand the business. However much these

structures limit what Relapse can truly do, like any business within a post-structural model, Relapse does have some free will to make decisions and take actions based around those structures to the potential betterment of the business. While the structure provides boundaries and even guidelines to some degree, the company can make choices within those boundaries to decide their best courses of action for their continuing business operations in an effort to further seek out profit to the benefit of their various stakeholders.

From the information uncovered here, it is evident that Relapse Records experience is different from that of other labels as poststructural thought requires that individual actors' have different experiences and that we must be understanding of those different experiences. Labels that are based in the UK surely have a vastly different set of experiences and their boundaries are far different than those of foreign-based labels that seek to enter the UK marketplace. The same can be said of those that produce different types of music like Victory Records or Rise Records which cater exclusively to the Kerrang magazine crowd whereas Relapse has different targets.

While Relapse has autonomy to make some decisions based upon how the structures they interact with affect their business, there is no right way to handle those interactions aside from realizing that the primary motivation of a business is to generate revenue. Therefore, Relapse needs to realize that while they do not get the home treatment that UK-based labels like Earache are able to generate, they are still able to achieve much success through continual trips to the country and visits with individual actors in the country.

We also must look at Relapse's identity within the market using Derrida's deconstruction technique. Speaking as the driver behind all decisions made in the UK, the initial goal behind all decisions made since I was in charge was to strengthen and build personal relationships first. This was the objective before profit at first for over a year that I was in charge simply because the British, as far as I could tell, were more apt to work with a company if they had a personal relationship with the other party. While, of course, the underlying goal was profit, the means to that end employed included bribery via product, dinners, and just general chatting for hours on end via various methods of communication to make Relapse seem more local and friendly. If Relapse were still a distant entity and not a local presence, I feared the local structures would be too overwhelming to actually accomplish our goals of building a true and real presence in the UK and Ireland.

Finland

Finland is a small but extremely important market for heavy metal music in general and Relapse Records in particular. One of the first bands that Relapse ever signed was Amorphis, a young Finnish death metal band from Helsinki in 1992. Amorphis are still active and as popular as ever even today and Relapse controls most of their back catalog including all the 'classic' records.

The key to understanding the Finnish market is “understanding the Finns” according to Anssi Koivusalo (Koivusalo, 2012). Anssi is an expert on the Finnish market as the label manager of EMI and he works with nearly all of the large independent metal labels including Nuclear Blast Records, Metal Blade Records, Earache Records, and Century Media Records alongside Relapse Records. “Finland is a dark, cold place that demands dark, cold music” says Koivusalo and he is right as Finland is the only country in Europe where Relapse death metal bands like Amorphis and Hooded Menace get mainstream FM radio play. The music is generally challenging and therefore, does not lend itself to corporate commercial radio play, but Finland is the outlier. “The long nights and cold, bitter winters have a lot to do (with the general populace’s tendency to appreciate heavy metal) but that’s not say there is not a lot of pop music in the market. I mean, I work for EMI (laughs)” (Koivusalo, 2012).

Finland, according to Koivusalo, is a “metal country” (Koivusalo, 2012) and that claim is substantiated by Jyri Lipponen, owner of the largest independent chain of music stores in the country, Levykauppa Ax (Record Shop X). “Metal is the backbone of our business though we Finns are big music buyers in general.” Lipponen claims that his website, Levykauppaax.fi (recordshopx.com), is one of the most heavily trafficked sites in all of Finland and that he can deliver anywhere in the country in a single business day. “Our mailorder is huge, but metal is one of our largest genres, especially our local Finnish bands. Bands like Nightwish and Children of Bodom, they really have a huge following here” (Lipponen, 2012)

Comparing the United Kingdom with Finland, bands like Children of Bodom and Nightwish are seen as ‘underground’ acts meaning that they lack broad-based, mainstream appeal but still have a large following of dedicated fans. In Finland however, bands like Nightwish and Children of Bodom are frequently competing for the top spot in the Finnish album charts when they have a new record. Helsinki-based Nightwish also frequently play sold out shows at the Hartwall Arena in Helsinki, which is where only the biggest of big acts play in the country like Muse, The Killers, Rush, KISS, and Rihanna. While a large underground band throughout the world, Nightwish would never play a 12,000 - 15,000 capacity venue (Hartwall Arena, 2012, <<http://www.hartwall-arena.com/en/index.php?id=66>>) like Hartwall anywhere in the world but in Finland. As background, the band recently played the Trocadero in Philadelphia, Pennsylvania in the US, which is a burlesque-turned-concert-venue that holds 1250 concertgoers.

Knowing the nationalistic nature of a culture that has such an affinity for the style of music that Relapse is known the world over for, Relapse really needs to focus on the Finnish market by both signing more bands and encouraging non-Finnish bands to invest more time in the country. While, of course, good, workable bands from each territory do not grow trees, but Finland has seemingly had a vast abundance of bands and fans though the population is small, roughly 5.4 million people (BBC, 2013, <<http://www.bbc.co.uk/news/world-europe-17290042>>) or roughly one-twelfth the size of the United Kingdom.

However, much like the United Kingdom, there are barriers to further entry. According to Anssi, the magazine market is dying and the largest media are now online given the technology and

relative wealth available to nearly every Finn. This means however, that it is difficult for distributors to be able to convince stores, especially Anttila, the largest chain in Finland, which albums will sell and which will not. However, given the sheer size of EMI, Anssi explained that they have leverage that other distributors, especially independent competitors like Tampere's Supersounds Distribution OY do not have.

Also, as a record label, there are other boundaries for Relapse that are more geographical. It is very difficult to get bands to tour Finland for a variety of reasons, mostly geographical. When a tour is booked, the routing is usually done so that bands can come in and out of the same airport. Given how simply far away from other population centers like Germany, the Netherlands, the United Kingdom, and France that Finland is, including Finland in a standard routing is usually a challenge.

In addition, because there is really only one major city, Helsinki, that international bands can justify playing on a standard three-week tour, it is difficult to land a date at a cost effective price because of the increased costs of the ferry. Routing to Helsinki means more than just the cost of gas like a drive from Amsterdam to Paris as the necessity of the ferry drives up every cost on a tour, usually which operate on a shoestring budget as it stands. In addition, booking shows in neighboring Sweden is challenging for most agents because the Swedish live scene is not nearly as vibrant as other parts of Europe and the only truly cost effective or sensible way for a band to get to Finland is via ferry from Stockholm to Helsinki as ferries from Germany simply take too long and cost far too much money.

Another barrier is the weather. Given tours are a string of dates with a beginning and an end, the bands need each and every date to be reliable and unfortunately, the harsh Finnish winters do not lend themselves to an aura of reliability. Therefore, many agents and bands are hesitant to go to a country where the fans may be hungry, but the weather could put remaining dates in peril for if the shows are cancelled because the band are stuck in Helsinki, the band does not get paid for the lost shows and misses out on a tremendous amount of income not to mention alienated and angry fans even if the circumstances are well beyond the band's individual control.

Unfortunately, Relapse, like all other labels, can do little about the weather or physical geography, so Relapse has to focus on Finland through other ways. Using digital media, Relapse has to engage the marketplace on a constant, daily basis for foreign bands so that even if the band are far away from the consumer base physically, the band are never far from the consciousness of the fan. Further, Relapse has made, and will continue to make, a concerted effort to sign more Finnish bands. Relapse has recently added both Hooded Menace and Unkind to their roster and given that nationalism is a guiding force in their marketplace, it means that Relapse has an added a level of credibility to buyers that are already willing to take in heavy metal albums to sell in their stores.

Further is a lack of major media players outside of two publications within the country. The first is Imperiumi.net. Imperiumi is the most widely read of the Finnish metal websites. Constant

streams of reviews, interviews, and features have long been a mainstay of the website. On their site, they boast about having over 20,000 independent readers daily, the second most of any Scandinavian metal website and the most in Finland, alongside a host of credentials showing the importance of the site in the Swedish scene. The site is known by both the general populace in Finland as well as all the buyers at the key stores and its opinions are tremendously important to the success or failure of a record.

The second local key player within the metal media scene in Finland is the influential print magazine, *Inferno*. *Inferno* is “the only print magazine that sells records” according to Anssi Koivusalo. “Buyers pay attention to *Inferno*” which is apparently something that cannot be said for *Miasma* or other magazines that are distributed and sold in Finland. Though its print run is dwindling, it has a hardcore fanbase that listens to the editorial staff according to the Jyri Lipponen at Levykauppa. He says that when an album is the “album of the month” or a highly recommended listening in *Inferno*, he and his staff know that they have to order copies of that album by the box and not individually or in handfuls. That level of trust by a readership is rare these days but *Inferno* has it in Finland.

The last major player in the media landscape in Finland is Metal Hammer UK, whom was discussed in the prior chapter. Given the educational structures of the country, nearly the entire populace is at least bilingual and speaks English at a very high level meaning that English media is frequently read by the local Finnish population. This means that the bleed from the London-based press is very evident in the buying and media consumption habits of the Finnish population.

Given the media picture of Finland as well as the geographical barriers to the country though it possesses a tremendously interested populace in Relapse Records’ and similar product, how do Finland’s results stack up against those of the United Kingdom?

Well, given the vast difference in population size of Finland and the United Kingdom, 5.4 million Finns versus 62.4million Brits (BBC, 2013, <<http://www.bbc.co.uk/news/world-europe-18027954>>), it should be expected to be much less in terms of sheer volume of units sold both digitally and physically.

Looking at the digital first, in the year 2010, Relapse’s total income from iTunes was, in US dollars, \$554,624.08. Finland’s income, after currency conversion at a rate of 1.37561, was \$1616.77 dollars for the year or roughly 0.2% of Relapse Records’ 2010 income from iTunes. In total Euros, the income from Finland totalled EUR 1175.31 and that amounts to a little over 2.39% of Europe’s total iTunes income for the year. While not strong, from a meager population of 5.4 million people, for the country to make up over 2% of the continent’s iTunes income says a lot about how ravenous their fans truly are though the Finns have not been as quick to adopt to online stores

In 2011, the Finns moved northward again, accounting for roughly the same percentage of worldwide sales but more in Europe. More notably, in 2011, they bought fewer units in total but

spent the same amount of money as a percentage as in 2010. This is likely because they bought more full-length albums than in the year prior, which is good for Relapse since it means that the label takes in more money overall.

While a small percentage of Relapse's overall iTunes income, the Finns income of EUR 1079.81 in 2011 does account for all of the advertising expenses in Scandinavia. As such, while Finland is small, but the country is important as it helps to pay for other expenses for Relapse around the region.

However, while iTunes requires little work in terms of uploading, the Finnish market in its current state is far more physical rather than digital. As mentioned before, metal fans are collectors and the physical market is where Finland becomes truly important for Relapse. Between 2010 and 2011, the Finns purchased 2,851 Relapse Records' physical units, leading to a total gross revenue of \$27,256.32 with a significant year-over-year uptick because of the move from Supersounds to EMI. One of the most significant reasons for that is that Antilla bought a large number of local rockstars, Amorphis' back catalog.

As evidence of how much of a "metal country" Finland is, during the same period, in terms of physical units, France only was worth \$10,000 more to Relapse than Finland (\$36,401.92) even though France is roughly twelve times the size of Finland and Italy was worth far less than Finland (\$15,760.92). Even the densely populated Netherlands accounted for only \$7,000 more than Finland with roughly three times the population (\$34,186.15).

In addition, part of "understanding the Finns" as Anssi mentioned is to understand the pride they have in their people and past. As mentioned earlier, Relapse signed Amorphis early in the career of the band and existence of the label and Amorphis turned in numerous classic records to Relapse but two particular standout titles: "Tales from the Thousand Lakes" and "The Karelian Isthmus." Relapse had not put out an LP version of either title in near 20 years, so when discussing with Anssi the quantity they would need in Finland, Relapse was told 200 copies of each on standard black vinyl of each double LP. When approached with the idea of doing colored vinyl that mimics the Finnish flag (one blue LP, one white LP) with a sticker marketing the 'Finnish version' the order jumped by 300 LPs, making the decision to do a special Finnish colored version extremely easy for the label as the additional costs were only about 150euro in total. This edition turned heads in Finland according to Koivusalo and showed to the market that Relapse is a real player in the market moving forward.

The Amorphis catalog, according to Koivusalo is the big seller. EMI owns or distributes the rest of the Finnish band's catalog, but Relapse holds the 'classic records' and Antilla and all the other chains and buyers around the industry know it. The Finnish fans are ravenous for local, Finnish music and Relapse has one of the local artist's classic set of records that sings most about Finland and the Finnish folklore and history. Similar to Canadian Shield Rock, Amorphis' subject matter, at least in their early years when signed to Relapse, revolved around the darkness of Finnish winters ("Black Winter Day") and the landscape (albums entitled "Tales From the Thousand Lakes" and "The Karelian Isthmus"). The band has always been big in its

homeland, because like Canadian Shield Rock, “regional and national identity” play a large role and they revel in their “Finnishness” whereas Canadians revel in their “Canadianness” (Johansson and Bell, 2009, 161).

As we can see by Amorphis’ success within their home territory, playing to the Finnish market and understanding the heartbeat of nationalism that the Finnish market contains is essential for Relapse’s continued success within the northern country’s borders. Further, continuing to focus on both local Finnish press as well as English press will strengthen their local media presence in addition to signing new, interesting, and up-and-coming exciting acts in Finland. It is essential for Relapse to appear as on-the-ground in the territory as possible, though that is challenging given that Finland is geographically placed in somewhat of an obscure corner of the greater European marketplace.

While, like the United Kingdom and Ireland, each company and entity will surely have different experiences as demanded by the poststructuralist approach, the clearest part of Relapse’s success and goals for the territory must be to maintain a localized approach using local artists and key media.

Helsinki, like London, is the focal point for any international label seeking entry into the country and Relapse’s experience there is surely no different than any other label given the central location of all the media. However, unlike London, the Finns do not seem to be as demanding for such personal attention like their British counterparts. Much of this is probably due to Helsinki not being a true ‘global city’ like London and the relative lack of concerts that happen in Finland as opposed to the daily glut of shows that happen in London.

Creative Content and the Digital Geography

Given that we know the massive financial success that is the United Kingdom for Relapse, there have to be some questions about the geographic relevance of Relapse Records to the United Kingdom. As Holly C. Kruse points out in her section of Sound, Society and the Geography of Popular Music on digital space which creates and expands scenes, leading to physical meetings, Relapse has taken a proactive marketing approach to online media content and are widely recognized one of the leaders within the heavy metal and hard rock subgenres and often are imitated by other labels. Relapse, as true believers in digital media, were one of the first labels to hire a full-time online promoter to its staff, which happened in 2000, far ahead of most labels. In fact, many labels still do not have anyone on staff that is a full-time digital promoter which, given the success Relapse has had promoting its records online seems simply absurd.

Relapse has long believed in creating what they call “the hype machine” on all platforms at all times. One of the requirements of a Relapse Records contract is that the bands that Relapse works with gives Relapse access to any and all of their presence online including social media. There are a few rationales for that. First is that when a record is released by a band on the label, it gives Relapse the option to announce it on all channels at once, not just via the label’s channels like major magazines. Given that some fans don’t know or choose not to care about

individual record labels and are more focused on individual artists they like, the label having control or at least access to the bands' digital presence allows the label to reach all that band's existing fans at once. Given that social media and music message boards and music news sites are so central to hardcore music fans' lives, Relapse Records makes a concerted effort to keep as local to their fans as possible. The digital age, as Kruse pointed out, has made it possible for anyone and everyone to be local via the Internet. This locality allows for fans to thrive and independent music scenes to build and merge and coalesce. Therefore, Relapse aims to build these scenes by providing local, immediate news via music websites in each country around the world and in as many languages as possible. Additionally, because the news is local, Relapse aims to make the purchases local. Not only through physical stores and online retailers like Amazon in the UK or Levykauppa Ax in Finland, but also through the immediacy of Internet downloading sites like iTunes and Bandcamp, which localize the store in one's living room or even on a phone.

Another key function that the digital market is reinforcing the marketing of a new record and this is another reason why Relapse Records requires access to all Relapse bands' social media and websites. Through re-posting and reblogging of praising reviews on each band's respective digital outlets like Twitter and Facebook, Relapse is able to consistently reinforce why each new record from each band they work with is so good. This reinforcing helps solidify the message so that even if a fan wanders into the store with money to spend, there's a chance they'll buy the record because of the positive stories that they are hearing about the new album.

Relapse additionally requires bands to give them access and make the Relapse office the central hub for all aspects of digital promotion because Relapse is actually the ones that receive the reviews so it makes the most sense to have them just share them via social media and post them to the band's website rather than go through the additional step of another email. It also allows Relapse the ability to create the hype and pace the reviews so that the band is consistently and positively in the social media news feed of fans throughout the planet. This build-up is effective in showing how widespread the interest is in the record whereas non-professional marketers like some members of bands may just put them all up at once which defeats the purpose of the constant, slow, steady, build from countries all across the world. not wait for someone in the band who may be working or on tour to do it.

Advertising on the various social media is a key function of Relapse Records' digital strategy. According to Director of Marketing, Bob Lugowe, initially, Relapse Records just took out wide-ranging ads targeted at heavy metal fans throughout the world rather than focused on specific countries or regions. However, according to Lugowe, "We did not have a lot of success with those advertisements as they did not generate income for the label or for our artists." The reason, according to Lugowe is that there are so many heavy metal music fans around the world and that geographic dispersion causes problems when advertising without specific targets in search of "likes," views, or retweets. Lugowe said "We added thousands of fans from Jakarta and Kuala Lumpur but we don't really sell records there and have a huge problem with bootlegging in that part of the world so those fans and "likes" - that reach - it just doesn't really help us as a label at the current time financially" (Lugowe, 2013).

As a result of thousands of dollars and euros spent on Facebook and Myspace with little to show for it in terms of revenue, Lugowe insists that the rethought strategy in place today at Relapse is far more effective. Relapse now uses a far more targeted strategy of aiming their ads only at territories where they have proper distribution using distribution partners like ADA in the UK and EMI in Finland. “We implemented the new targeted strategy in 2011 and it’s been far more effective in reaching new fans and reinforcing the marketing efforts on our records. Facebook isn’t likely to break our bands and make them big sellers as much as it is used to remind people who have already heard about our bands and our label.” While admitting he has no hard evidence or numbers to back up his belief, Lugowe stated that he believes that fans that find Relapse bands on Facebook are likely to stay on the digital medium and, if they buy, buy from iTunes or the Relapse Bandcamp site or just stream audio on Youtube or Spotify which, while pennies for the label, is still income (Lugowe, 2013).

Additionally, Relapse Records requires their bands to allow access to digital promotion because many bands are on tour and simply cannot do it themselves. As such, Relapse’s digital promotion team handles the bands pages in their stead. Posting about upcoming concerts, sold out shows, unfortunate cancellations, and funny stories that the band have communicated to the label. In addition to all the great reviews that are posted online, the tour dates further allow bands and labels to take the digital independent music scene and make it a vibrant, physical scene as Holly C. Kruse pointed out when referencing the British goth scene.

Lastly, social media like Facebook and Twitter are easily quantifiable places for labels, concert promoters, festival organizers, management companies, and distributors to gauge the size of a particular artist. Simple numbers like the numbers of “likes” on Facebook or followers on Twitter tell a story about the band and their demand and popularity and Relapse has a long tradition of being one of the first to adopt new media. Other labels have joined as well, but many, as recent rumors have done so in somewhat less than scrupulous means. A recent blog post by William Vogenhauer (Vogenhauer, 2013, <<http://vogenhauer.tumblr.com/post/49177430764/a-lie-a-reality>>) seeks to expose some major independent labels for buying likes in Southeast Asia and Mexico, which artificially generates income through streams of songs on Youtube and makes their bands appear larger than they otherwise would be. Eventually, as this story further develops, this will create a significant problem for labels engaged in these business practices and will adversely affect the careers of each band involved in these practices. When questioned about Relapse’s presence on the list as a label engaged in Mexico, Lugowe responded by blaming North American servers and saying that the company does not do any Facebook advertising in Mexico and “strictly adhere(s) to the company’s strategy” which was outlined above (Lugowe, 2013).

Another way that Relapse Records uses digital media now is distribution of promotional material via Haulix. Haulix is a watermarking promotional distribution service that many labels use to send watermarked promotional copies of advance records to key media around the globe. Haulix, which is a pay service, allows the label to safely email promos to important contacts in the media throughout the world. It works by entering a contact into the interface and then

putting them in a group that the user names something like “Finland Key Media” and then when it comes time to send a new promo out for review, or solicit for features, the album is sent by the user on the label side and each person that received a copy has it digitally watermarked to their name. These promotional albums are watermarked as to prevent leaks, as if a record is leaked and it comes back as watermarked to a member of the media, Relapse Records (or any other label that uses watermarked albums) can seek some level of restitution against the offending media partner.

While tremendously useful for soliciting for print stories, labels truly see the digital benefit to Haulix when they send to their website contacts (usually a week to ten days before release) as websites have no deadlines like print media. As such, once they receive the record, one can download it, review it, and put the review up. This sort of mass buzz as literally hundreds of reviews go live within a day or two of each other allows each band on Relapse to occupy real space on numerous music websites around the world, creating buzz, discussions, and driving preorders at both brick and mortar stores and also on digital vendors like Amazon, Levykauppa Ax, Bandcamp, and iTunes as fans eagerly await the street date of the album.

Another area that Relapse Records uses for digital media is premiering new music. Labels used to think that the Internet was evil and simply a vehicle to steal their product via Napster, the Pirate Bay, or other torrent or file sharing services. However, Relapse Records views those days as long in the past. Relapse Records uses various media partners throughout the globe to premier new music by providing either embeddable Youtube links or embeddable Soundcloud links to these partners. In the United Kingdom, Relapse frequently uses Terrorizer and Metal Hammer’s online sites to premier new songs as many metal fans throughout the country migrate to those sites on a daily basis anyway but as the Finnish media landscape has shown, those sites also attract a large number of English speaking fans from other countries across Europe and the world.. Relapse usually premieres the same song on various outlets throughout the world for fans to check out by promising these media partners exclusivity within their country or within the language of that the bulk of the content on the site is written. However, given that many fans do not speak English, Relapse actively seeks out partners in various languages throughout Europe and Japan, which is where most of the company’s foreign sales originate. This allows for easy reblogging onto a litany of message boards and provides ample social media shares on more websites and in more languages than Relapse could have hoped to reach even a decade ago. Further, it allows major social influencers within each local scene to have a stake in a record’s success by championing it “before it was cool” and seeming ahead of the curve.

Relapse, knowing that file-sharing is still a major issue, does monitor music blogs, file sharing sites, torrents, and message boards for illegal versions of their material. They do not do it by hand, but rather, employ crawlers or digital takedown groups like Essassin Media which specialize in takedowns.

Further, there are sites which are both a blessing and a curse to record labels like Hasitleaked.com. These sites monitor when a record has leaked to the Internet but then also

publicize the leak for all fans who are looking for a free download of the record. Anyone at Relapse, or any other record label for that matter, will tell you that it's an absolute nightmare when a record leaks early as, when it does, the proverbial cat is out of the bag, and the best that Essassin or groups like that can do is play an online, virtual game of "Whack a Mole" taking down leaks as they arise.

Many music fans and websites argue that leaks do not hurt record sales but they'd be dead wrong. They're right when it comes to physical sales as the people that want to buy a CD or LP are far less likely to accept a pirated download of a record they want. However, the people that purchase from iTunes, Bandcamp, or Amazon's digital site will more than gladly accept that download and then, of course, not purchase files that they then already have.

The digital world is key for Relapse Records. Like Holly C. Kruse's forward thinking research on the geography of digital media shows, fans will react accordingly if labels, bands, and musicians use digital media to their advantage. Those that do not risk severely falling behind labels like Relapse which have embraced social media in a way that few labels thought to even five years ago.

Torrents, illegal downloading, sites like Hasitleaked, and companies like Essassin are part of the structural digital landscape now and Relapse has to work within those boundaries. Relapse has chosen to work with Essassin and similar companies to take down torrents while other companies have made the autonomous decision to let the structures of illegal downloading do what they do, and perhaps it will drive sales. Unfortunately, there is little data available showcasing which decision is better at the current time.

Surely, the digital geography has shifted for much of the industry but not for all players surely. Labels that cater to older demographics are less likely to have their business models changed dramatically. While yes, there will still be plenty of changes to each individual business; no business is going to encounter quite the same structures and barriers. For example, older demographics may be less technologically adept and that means that each actor will have vastly different experiences with the shifting structures of the industry and those structures will also be more or less challenging for each label as time passes.

Global Production Networks and Their Implications

As an international business, the supply chain for Relapse Records is spaced out across the globe. Relapse has to secure numerous inputs before they can release music for the world. However, when discussing global production networks, Peter Dicken argues that GPNs do "not necessarily...span the entire world; rather, it suggests that they are highly geographically extensive and functionally integrated across national boundaries" (Dicken, 2010, p.56).

Assuming the staff is in place around the world, the process begins with A&R (artist and repertoire). Bands from all corners of world spend years writing and recording music but Relapse has to determine which bands or artists they want to work with and also on what

contractual terms. Assuming there is common ground and a recording deal is struck, the label has successfully courted a band for the roster. Currently, Relapse has bands from Europe, Asia, and North America write and record music for the label though the vast majority are North American bands or artists. This is the base of all future actions that the company will take moving forward as the music is the very core product that Relapse will sell moving forward. This input, however, is unlike tangible inputs. It's a sound that still can be commodified, but the difference between what Relapse does and most other businesses is the value of the product is determined by a host of different factors, but the largest factor is the value that the international music consumer places on the sound. In order to get to having a finished, fully mixed and mastered album with artwork, Relapse has to infuse capital into the recording artist so that they can source a studio, production engineer, and artist among other things and these necessities are based all around the world depending on the artist and their vision.

Once a master has been received by the label along with any art, the production starts in earnest at Relapse's headquarters in Upper Darby, PA. Initially, the record has to be registered with a publishing company based in New York digitally to help the artist and the publisher (usually Relapse) properly monetize and protect the songwriters' interests throughout the world so that they compensated accordingly for their efforts.

From there, the artwork, assuming it was completed elsewhere is processed and dropped into the proper templates for printing. This is where the "transformation" of the input, as Dicken refers to the next step in the GPN, truly begins (Dicken, 2010, p.56). After the decisions are made regarding printing amounts, the determination is made on the most cost effective way to sell the album throughout the world. The label, at this step, begins to transform the music and art into a saleable, physical and digital product.

Once the decision has been made about where to manufacture saleable product and the album is manufactured, the album is shipped from the manufacturer to our distribution centers in North Carolina, US and Maastricht in the Netherlands.

From the central distribution centers, the albums are then sent to Relapse's individual country distributors like EMI in Finland and ADA in the UK and Ireland. These distributors are then charged with sending products to retail sellers like Amazon or Levykauppa Ax for the last step before Dicken's "consumption" stage where consumers purchase the products they need or want (Dicken, 2010, p.56).

Assuming the distribution and marketing drive music fans to stores and they purchase the album in stores, the money is redistributed to the stores, then to the distributors, and then onward to Relapse. Based upon the money received, Relapse transforms it to paychecks, royalty checks for artists, and uses the excess for input in the next record that they can produce.

At the company's base, according to Dicken's notion of global production networks, Relapse helps turn money into art and then art into a global distribution network, and then back into money from consumers for both the company and the artists it represents.

However, it is not that simple. Dicken argues that the state, as an entity plays a large role in businesses and this is certainly true for Relapse. Relapse is a transnational corporation and has to work with numerous state agencies throughout the world and is incorporated in both the United States as Relapse Records, Incorporated and as Relapse Records BV in the Netherlands. Therefore, the company is subject to tax laws from both the United States and the Netherlands, as well as subject to certain cross-border shipping rules and regulations from the European Union. According to Wilko Reijnders, Relapse's Dutch accountant, Relapse uses the Netherlands as its base because the country allows cheap, and sometimes free, importation of goods from the United States the company also has a Dutch VAT. This state interplay has great impacts on the overall global production network for Relapse, because it is much cheaper to produce goods in the US and ship to the Netherlands given this tax policy. Otherwise, Relapse would produce (and has on occasion for big records like Baroness' "Yellow & Green") in the Czech Republic, where things are more expensive but still within the EU and therefore, not subject to importation charges.

Dicken argues that transnational corporations (TNCs) have three basic characteristics: "the ability to coordinate and control various processes...within transnational production networks," the ability to take advantage of geographical differences in terms of labor, costs, state policies, etc, and geographical flexibility in its ability to shift sourcing and operations (Dicken, 2010, p.61). Relapse is fully capable of all three factors, and as such, its ability to maneuver is far superior to some of its local competition, leading to increased profitability around the world.

Recommendations

From a poststructural analysis the overarching theme that we see from these two countries is that the biggest key to Relapse' continued success is the ability to align itself with bigger market forces. In the United Kingdom and Ireland, Relapse has aligned itself with Warner/ADA for distribution and EMI in Finland. Both large major labels, the companies are so large that they are now part of the structure of both the music industry as well as the entertainment industry at large. Of course, being constrained by market forces is part of any business, so Relapse needs to continue to align with larger players in a shrinking business rather than continually fight against the structure or view the larger players with hostility. Warner and EMI have far better access to the wide marketplace than Relapse would on its own, so it is at Relapse's peril if it chooses to continue to ally with smaller distributors in other territories. Acknowledging and embracing the structure is a better route for the continued and long-term success of the label.

At the same time, post structuralism argues that individual actors, while constrained by structures, do have a level of control over themselves and their actions. This is where Relapse can make some better decisions and changes from the baseline numbers of 2010 and 2011 that have been shown above. Of course, some of these options are subject to structural forces as well as technological adoption and abilities will play a role in the company's decisions to act upon those forces.

On that end, it is imperative for Relapse not to fall too far into its relationship with the structural players. Relapse has long done a solid job of making its own marketing and product decisions as well as deciding what bands to work with. These decisions, until now, have grown the label from a basement to a business with offices and employees on three continents. As such, it proves the label itself knows its core business better than any structural and large external company ever will and needs to make its own decisions on marketing strategy while utilizing the strengths of large companies' distribution arms to make those marketing strategies all the more effective moving forward.

One new option, which too, is constrained by market forces to some degree, but also allows for massive reach is social media. As companies around the world figure blogging, tweeting, and Facebooking into their media mix, it is imperative for Relapse to approach this new medium on the digital landscape without reservation. The company already has a robust social media presence and recently instituted a Relapse Records European profile to reach the European market at more peak hours given the time difference between continents. However, there is more needed to be done and new ways to engage and expand the social media interest and consumer reach.

Right now, Relapse's Facebook, Twitter, and other social media outlets are used primarily to break news about new acts, tours, and upcoming releases right to the fans while leaving out, or at least making secondary, purchasing options for the label feels if it pushes too hard, it may alienate fans.

One area is potential sales on the digital side offered via one particular social media outlet. For example, if Relapse were to offer a 'Facebook follower' sale where they provided an online coupon code via their Facebook account, you could drive the number of fans of the page higher while potentially boosting sales. While not obnoxious and downright forceful, music fans love sales like most consumers, so offers like that could be well received. The same could then be done on Twitter, Tumblr, or any other social media site.

Further, new sites are continuing to attract music lovers. Discogs.com is one of the dominant sites at the moment. Discogs allows users to discuss, discover, and buy and sell music on their site and caters to the extreme collector, which many Relapse followers are. In addition, it allows direct contact and access to individual fans and builds strong relationships with those fans who know they can trust the label to deliver things that they want at fair prices. Here, Relapse would be utilizing new digital geography to meet and interface with fans while receiving both financial reward as well as potentially winning new fans as the site has a social aspect that could help the label reach and convert new ears.

Another area to look at is the changing face of media today. Large, well respected media like Rolling Stone and the BBC have long been no-go areas for mid-range independent labels like Relapse. This is changing. The media's institutional structures themselves have realized the changing dynamic and increasing popularity of music aside from that on the four major labels, so they have been hiring fans of smaller, niche markets. For example, BBC1 Radio now has a

show called “The Rock Show” on Mondays at midnight London time. The show is hosted by Dan Carter, a longtime heavy metal aficionado whom is a huge Relapse fan. “BBC has changed,” Carter said. “It’s not the way it was even 10 or 15 years ago when what Relapse did was strictly underground. It’s simply too big a sound nowadays” (Carter, 2012).

Using Carter, Relapse has been able to secure “BBC Sessions” at their famed Maida Vale Studio in North London for play on “The Rock Show.” These sessions have both boosted Relapse’s credibility in the United Kingdom, but also, are available to the label for licensing. In the cases of both Baroness and Red Fang, Relapse has made the decision to use the sessions for future release, thereby further monetizing the media structures. Therefore, it is imperative for the label to continue to cultivate, find, and build well-connected fans of the label to assist in further enhancing the label’s stature in localities all around the world.

Now, Relapse is nowhere near as large as some other independent labels that operate in the same genres. Speaking with Yorck Eysel, a senior staff member at Nuclear Blast, Yorck articulated that labels like Nuclear Blast and Century Media are larger for one main reason: location. Both labels started in heavy metal hungry Germany, which allowed them to cultivate a large, local fanbase before expanding. While Relapse is from what is technically a larger market, the United States market is not nearly as homogenous and nor have there been the large-scale opportunities to promote the label to huge swaths of the key market like there are in Germany through huge heavy metal-centric festivals, like Wacken Open Air near Hamburg held annually, that attract literally hundreds of thousands of fans for a long weekend that allows a label to showcase both its bands on stage and its wares in the merchandise tent. “Wacken was huge for the development of Nuclear Blast,” Yorck said. “Wacken gave us a chance to (develop) our home market and the surrounding European countries before (Nuclear Blast) entered the overseas markets like North America” (Eysel, 2012). From creating an awareness, to developing each band’s fanbase, to building direct relationships with fans and selling hundreds of thousands of deutschmarks and euros at the merchandise tent directly to those fans, Nuclear Blast has benefitted from the centrality of the large-scale festival circuit in Germany that Relapse has never had the privilege of enjoying in the United States. Unlike the CCM scene, as pointed out in the research, the United States lacks real, major festivals that draw tens of thousands of music fans. However, as the company continues to expand and grow in Europe, direct appearances at festivals are definitely more likely. In addition, the label’s profile is large enough that other labels and large wholesalers are reaching out to the label to carry their stock at festivals so while Relapse isn’t making retail sale price on the units, they are at least seeing additional sales at their wholesale price and those units sold are non-returnable unlike units put through most distributors throughout the world.

Another area for growth is within the major press. As the digital age has evolved, the ability for smaller labels to grow their bands, rather than simply being farm clubs for the major labels, has grown exponentially. When Taking Back Sunday, on Chicago’s Victory Records, a former hardcore label that previously worked with very non-mainstream but sizable underground bands like Earth Crisis and Hatebreed, hit #3 on the Billboard Charts in the United States in 2004, it signalled a massive sea change in the independent rock and metal community throughout the

world. No longer was the very peak of the Billboard charts reserved only for mainstream pop and rock acts, but could be reached by the top independent labels as well. As the demand for these bands has increased due to the flow of information across the internet, it has broken down barriers. Press, of course, needs to appear timely and previously disinterested press now needs to cover independent music since a significant scene has developed through the digital geography of the Internet. Therefore, labels like Relapse that can drive interest on the Internet can pull resistant mainstream media to cover their bands in much the same way that the concept of “pull marketing” works, where marketing efforts effectively pull customers to buy their products through special exclusives and other means.

Further, on a digital side, there is much for a label like Relapse to do. Given that the digital world helps to lessen the structures around the industry, it gives labels like Relapse a lot more autonomy to work towards building its own bands and bottom lines rather than merely that of a major label, chain, or distributor. No longer is physical distance or press true gatekeepers between an independent label and potential fans, the digital media has allowed for Relapse (and other labels) to truly reach their fanbase and sell direct to fans. As such, Relapse should offer the best deals possible to their fans on their webstore for physical CDs, LPs, shirts and other merchandise, and also, downloads of their records at a low price going around iTunes. This would allow for the label to offer their fans cheaper copies of the records while bringing in more income for themselves, which, in this day and age of shrinking margins in the industry, would be a tremendous boon for the label.

Relapse needs to do more in the packaging front to further develop its webstore. While physical sales continue to drop in volume as CDs become an even more obsolete technology, the demand for physical product is and always will still be there. Many true, real fans of bands on Relapse and other labels will still want to have something from the bands they know and love and wish to support. Metal is a genre about community and part of being a member of the community is “looking the part.” That look frequently means long hair, dark jeans, and black tee shirts featuring the fan’s favorite bands. The physical culture of metal means that there will always be some demand for physical product as it is not possible to download a tee shirt or a poster or a patch or a sticker even if the music itself can now be bought, traded, shared, pirated, and downloaded online. Metal fans like to show their support for their favorite bands and also like to publicly display that they are metal fans.

Physical Product

Additionally, some fans will always prefer to have physical copies of music product and Relapse will also need to cater to those fans. However, to market the physical music product, the packaging will need to become more elaborate so that it increases the value proposition for fans as the technically savvy fans can illegally download Relapse’s products via digital means as it currently stands.

Given that there will always be a demand for physical product, Relapse Records has to continue to embrace the physical product. It is essential for Relapse to remember that their fanbase is

somewhat of a “collector market” meaning that these people like to have and hold their products and be able to display them at their homes and show them off to friends, family, and fellow fans on the Internet on message boards. While elaborate packaging is needed for vinyl records in particular, Relapse cannot forsake the compact disc either as the CD still makes up the majority of physical sales for the company throughout all markets.

CDs

The structures of the marketplace still currently ensure that CDs have a place in stores, though that is dwindling. However, the CDs need to be ‘rackable’ so there is another structural constraint on what type of product Relapse Records can offer its fans and potential customers. ‘Rackable’ in this sense, means that it can fit on store shelves which are pre-sized to fit standard compact disc packaging, so if Relapse were to create an extremely elaborate package that does not fit on the shelves of most retailers, the retailers would not take the product in because they would have nowhere to properly display it and sell it, leading to that extremely elaborate product only being sold in very specialty retailers or online, thereby decreasing the potential reach the product has.

Therefore, the retail structure somewhat lags behind the current demand from niche music fans because standard CD packaging still sells for older generations and for mass-consumption styles of music like pop music. This structure forces Relapse Records to continue to put out CDs in a format that they know will not sell as well in the near future, but may sell now. As such, Relapse has to be very careful not to over produce CDs in each territory for fear that returns will outrun sales, leading to serious financial problems for the label as a whole. Therefore, it is imperative for the label to have at least some rough idea as to the sales potential of any new release in each of the thirty to forty foreign markets it directly distributes in as well as in its domestic marketplace, the United States. Additionally, the label has to take care not to over order for fear of sitting on hundreds or thousands of units of dead stock that will never move, no matter how low the price goes because the CD is becoming an extinct format.

That said, when the retail structure around the world does change, there may still be room for compact discs within the overall retail landscape but they will be viewed more as a niche product for the diehard, true fan. However, because of the potential lack of volume, big box chains are likely to move away from physical music retail and further focus on selling products that allow for digital music consumption such as iPods, iPads, smartphones, and other new technology devices. Relapse Records is far too small to impact these major structural shifts in any way so therefore, physical music sales will likely fall to niche retailers. This niche will likely only cover a fraction of the former physical CD sales marketplace but will also likely accommodate more extreme, elaborate forms of packaging to make the products more appealing to fans and also generate press coverage of the product within the heavy metal community. For example, as recently as Friday, April 26, 2013, the artist Ghost released a highly controversial box set for their new record on Universal entitled “Infestissurnam” that has been blogged about, retweeted, and discussed tremendously over the past two days even though it is limited to 250 copies worldwide (Hartmann, 2013, <<http://loudwire.com/ghost-b-c>

[signature-sex-toys-phallos-mortuus-ritual-box-set/>](#)). Therefore, extremely creative product design and marketing efforts will be needed in the future for the compact disc to remain as a relevant format within the music industry even though it still makes up the majority of sales at Relapse Records and at most other record labels though that is changing rapidly.

Vinyl Records

The vinyl records revival has been a much talked about phenomena over the past few years. Retail, as evidenced by the numbers above, has shown some interest in vinyl but it, until now, has been somewhat of a niche phenomena that is driven by internet sales. While vinyl is certainly a key economic component of Relapse Records, the margins of three-to-four Euro per unit are too low from wholesale to significantly fund the label's business functions. Therefore, vinyl's primary revenue driver for labels, including Relapse, is retail sales of physical vinyl. In order to encourage these sales, labels have gone to increasing elaborate lengths to chase retail sales and develop their online stores, forsaking physical markets for digital ones.

From boosting online advertising to developing exclusive items, record labels and online retailers have sought out ways to chase vinyl record retail dollars over wholesale income. Relapse Records is no different than any of its contemporaries including Marseille-based label Season of Mist, whose publicist and well known and widely respected journalist, Gunnar Sauermann recently commented about the Season of Mist online store's list of its most popular items "It's so rare to see a CD on this list anymore. It's all vinyl!" (Sauermann, 2013). Sauermann is right. Vinyl on exclusive colors, in exclusive formats, has become an online retailer's dream since it appears to music fans that want and value nice packaging and are willing to pay a marked up price for something limited, exclusive, and rare. At the same time, labels like Relapse and Season of Mist have also developed a more simplistically laid out product that appeals to regular music fans that buy in stores, where the margins on these versions of the same record on vinyl are more acceptable and sustainable.

Again however, retail has been slow to act with big box retailers only taking in vinyl in the last two or three years and demanding excessive margins because of the floor space that a proper vinyl display requires given the sheer size of the product alone. However, paired with more basic versions of vinyl records being supplied by labels, the industry's retailers have begun to make a significant structural shift in the industry.

It is here with vinyl records that labels can both play by industry rules by providing basic packaged versions to retail while at the same time forgoing the structure of the industry and finding the niche fans that are willing to pay for elaborate packaging and rare items. Labels have autonomy to do what they want with this aspect of marketing - product design - but still have to play by some of the same rules regarding other aspects including promotion and formats. Pricing, however, is one of the major areas that allows labels to play in both arenas with exclusive, rare, expensive product and then creating a generic product that uses the same manufacturing lacquer to save on manufacturing charges. Therefore, the same lacquer can be used to press the rare vinyl as the version headed out for major distribution and stores, saving

Relapse hundreds of euros on each release and given that the basic structures are the same throughout much of Western Europe in regards to retail, pricing in the UK and in Finland by retailers garners roughly the same margins on an LP. That margin is around four euros back to the label after all costs including manufacturing and the units of vinyl sold in stores are always non-returnable since vinyl is far more fragile than the compact disc. All costs, including store and distributor margin, as well as label margin and manufacturing and shipping costs leads to a basic packaged featuring a single sleeve black vinyl record with a full color insert to generally retail between eighteen and twenty-five euro in stores.

Predictions for the Future

The structures of the industry are changing. The digital geography has further linked the world and will continue that shift. As technology continues to evolve and people continue to use more mobile devices and are no longer chained behind a desk in order to reach the digital world, record labels and the music industry will have to adjust to these changing structures. The structures of the industry, once they have been forced to change, will have a dramatic impact on smaller record labels in the future, including Relapse Records.

The Digital Geography Moving Forward

Music, traditionally viewed as a physical product, has changed much over the past two decades. The formats are changing and will continue to change. The concept of music “on a cloud” is seemingly new and the availability of music now, given industry-altering shift brought about by advances in technology and technology companies that previously had little to do with music consumption or distribution. These advances have forever changed the industry and forced it to adapt and change at or nearly at technology’s pace, which has caused much lag between the industry’s ability to monetize its product properly and the ability of fans to enjoy their favorite artists for free by way of pirated music through torrents or Napster.

However, labels and structures have begun to change. The first part is that labels are starting to adjust and realize that fans are going to download music if it is not available to them easily. Therefore, most labels, including Relapse, have begun to realize that the key to developing online sales is to make their products as easy as possible to buy on various digital marketplaces like iTunes and Bandcamp, but also on all streaming services and local digital marketplaces with the help of international digital distribution aggregators like The Orchard, whom Relapse Records employ to help exploit their material. The ubiquitous nature of services like The Orchard help to ensure that Relapse Records’ products and artists are available for digital purchase throughout the world at any time of day. At the same time, Relapse and other labels including Season of Mist and other contemporaries attempt to make it difficult to steal their music illegally via digital piracy by employing web “crawlers” that seek out any links to download the company’s copyrighted material illegally. Relapse, among other labels, also companies like Essassin Media run by Chris Caruso. As explained earlier, Essassin Media essentially plays a game of digital Whack-A-Mole where they employ similar crawlers and other more advanced computer programs to take down torrents and files of their clients’ copyrighted material. This

combination of an easily available to purchase product combined by with the company's willingness to pay extra money to is going to become a more frequent model for labels moving forward in the next few years as the revenue from the mass quantity of compact discs continues to drop over the next few years. Therefore, while the technology will change and, of course, there will be new ways for people to pirate music, movies, and games illegally, Relapse Records and other labels will continue to adapt and develop ways to make their product available on every possible technological format moving forward. Record labels, especially the industry standards, the major labels, learned long, hard lessons about failing to embrace technology and as such, have endured down year after down year.

Given that these labels somewhat determine the structure within the industry, they have had enough suffering and have begun to seek out ways to stay on top of new media and have embraced the new revenue streams, though they do not pay as much as the traditional physical sales market. As these large major labels wield tremendous power with various government agencies that are tasked with ensuring copyright holders and rights' owners are protected, it is likely that many current forms of digital music consumption will change or at least end up in court or in a series of high stakes negotiations where large companies battle over the price per click. As evidence, in Germany at the moment, most music on Youtube is blocked because GEMA, the German government's authorized agency responsible for the payment and administration of mechanical royalties and performance royalties, has won lawsuits against the web giant for illegally hosting unauthorized materials and further, not paying the adequate amount back to the artists while the site itself generates revenue from advertising to the traffic the site sees from users partially seeking out that unauthorized material (Techdirt, 2013, <<http://www.techdirt.com/articles/20130113/21374021652/gema-vs-youtube-hits-three-year-mark-as-rate-negotiations-fall-through-again.shtml>>). More lawsuits are on the way in courtrooms around the world as websites and record labels and other rights' holders or agencies tasked with protecting copyright holders fight over the money generated on a per-click basis, which, while seemingly small, when applied to the entire web, constitutes billions of dollars in revenue on an annual basis.

Also, as labels and rights' holders continue to fight with content distributors over meager sums of money on an individual usage basis, it means that both labels and rights' holders will be paid less, which in turn means that artists themselves will likely be paid less if they don't own their own rights. As former Relapse Records label manager, and current Season of Mist United States label manager Gordon Conrad stated, "physical sales meant dollars to artists, rights' holders labels. Digital means pennies" (Conrad, 2012). Therefore, those coming wars and negotiations between two of the largest structures within the industry, content distributors like Youtube and content providers like labels and bands are a tremendously important for all parties but none more so than labels and bands, whose potential income from sales of their music will shrink as the physical market continues to shrink.

The Physical Marketplace of the Future

Music, though increasingly digital, will always have a physical component. True music fans are often collectors and want physical product to showcase their affinity for a genre, a band, or an individual artist. MP3s or downloads or streams of a band's music or even just a shirt with the album cover screen printed on it are probably not enough to satiate the true diehard fan. Therefore, there will always be some sort of need for physical product from artists for their fanbase.

Physical demand is shrinking on a daily basis across the music industry. Numerous studies conducted each year show that the structures around the industry continue to trend downward with stores allocating less and less physical space to music and some big box retailers are cutting music out altogether or going bankrupt themselves.

Therefore, a small demand and shrinking competition from big box retailers opens the door for a niche marketplace to take hold. This niche will likely exist in both the physical and digital marketplaces.

First, there will likely continue to be a small chain of semi-affiliated stores that form an alliance to negotiate better prices from distributors and labels as well as offering cross-country co-op marketing opportunities. There is already at least one group of stores in the United States that go under the banner of CIMS, the Chain of Independent Music Stores. This chain has stores that are each independently owned and operated across the country. This chain is continuing to grow in importance and are being supported by record labels in a variety of different ways including through marketing efforts like "Record Store Day" which is a day in early April where numerous labels pool their resources and release rare, out-of-the-box items on that day only through independent outlets resulting in long lines and high volume around the country at independent music shops. As other larger retailers increasingly shy away from music, alliances of localized, niche stores like the CIMS stores will only continue to grow in importance around the world and even the potential for international alliances will begin to take shape.

Further, physical music will continue to have a place on the Internet which has so effectively begun to replace music's previously physical-only aesthetic. Through large retailers like Amazon, physical distribution will still be an option as Amazon rarely returns product and orders only what they believe they can sell, they are a label's ideal client, cutting down on over-pressing units and maintaining low overhead costs. Offering sales, quick shipping, and one-stop shopping, Amazon appeals to the everyday person and the music fan alike, thereby enhancing chances for quick purchases of physical product for any label. Additionally, Amazon will eventually learn to go around distributors and seek out labels directly, as currently, distributors are able to streamline and ease ordering and fulfillment of massive quantities of goods to Amazon warehouses throughout the world. However, the day will come when Amazon hires numerous specialists within each genre of music that are charged with ordering directly from labels like Relapse Records, driving better margins for Amazon as they wield so much power in the marketplace and cutting out the middleman, the distributor, altogether, and permanently altering the massive structures within the industry.

In addition to Amazon, one other key place that physical sales will migrate is direct business from both bands and labels utilizing personalized web stores and more basic, predesigned places like Bandcamp, which allow buyers to buy physical and get an immediate free download of the music while their physical product ships to them. The immediacy of the download, in the modern immediate culture of the western world, paired with the desire for the physical product will drive some fans to buy direct for their physical product needs.

However, as the poststructuralist model demands, not all labels will experience the same changes. Certain labels and styles of music will experience much more drastic changes, especially so are those that cater to younger audiences. Younger, more technologically adept consumers have never known physical music and will likely stay away so those businesses will have to have a greater focus on the digital marketplace whereas those labels whose music and marketing objectives cater to older crowds will still be able to focus on a physical marketplace using places like Amazon. It is important for any label to realize these demands and adjust accordingly. Relapse's market skews male and somewhat, but not entirely young (ages 18-45 roughly).

Lastly, live events will always be a staple and key structure of the music industry and bands will always be able to sell some product on the road. Through increased marketing efforts and autograph signing sessions, bands will be able to sell physical product while touring, though music sales themselves may dwindle when compared with other forms of merchandise. That said, the music that Relapse Records releases is primarily heavy metal, which is traditionally a style of music, unlike other genres, that thrives of the live scene where ravenous fans desperately want to see their favorite acts and go wild.

Conclusion

Relapse Records, as a company, is part of the structure of the industry. For decades, the industry used magazines for promotion, large brick-and-mortar stores and distributors to assist in purveying its bands and artists throughout the world. However, as larger structures like evolving technology influence the way music is thought of and consumed throughout the world, Relapse will have to continue to evolve as a label and continue to seek out new means to work as broadly within the boundaries of the economics, logistics, and politics industry as well outside of the traditional industry to surpass music's old guard of record labels, distributors, and big-box retailers which fought against structural technological change (and lost) for the betterment of the company and the artists it represents as a whole.

In today's marketplace, Relapse Records has to be nimble and agile in order to make serious changes to its business model quickly while not forsaking the company's core value of putting out great music that fits the interests of the staff and the fans of the label. So long as Relapse Records continues to value and maintain those two tenets of its business, the label will find a way to thrive through the changing revenue streams and uncertainty of the industry as a whole as the key to any business' success or failure is the product it sells and the music industry is no different.

While poststructuralism argues that individual actors face different sets of circumstances and the structures that these actors interact with differ, Relapse confronts many of the same structures when entering international markets like other labels and even other companies in different industries. That said, while there may be similarities, we must be careful in the way that we analyze Relapse or any other label as they each have their own strengths, weaknesses, and other issues that go on behind the scenes. No two companies are alike no matter how similar the industry or the product as the human element plays a dramatic role. Relapse has a tremendously strong team of individuals that has helped the business thrive and become one of the leading forces in the independent music scene. Not every business can boast the type of people that inhabit Relapse's headquarters outside of Philadelphia and it's that understanding, that every business is different and handles its own set of challenges and geographies uniquely that is the key to understanding the geography of Relapse and of any record label.

The story of Relapse is similar to other independent record labels. The massive shift from physical to digital has caused reverberations throughout the industry. States, while still important, have decreased their role as now, digital distribution allows larger companies to sell their goods online from the United States or Canada to Europe and the rest of the world, sometimes skirting local tax policy. In addition, record labels can take numerous forms nowadays as poststructuralism would argue given that individual stories, histories, and experiences are key drivers behind future decisions. As a result, some labels can focus strictly on digital distribution and sales, while other labels including Relapse, have chosen to still focus on physical as the primary source for income. The major reason for this is the preference of the fanbase, and Relapse's fans are still predominantly a physical music buying group though this is changing over time and year over year. The scientific significance of the shift to digital and the changes in local buying habits cannot be overstated as it speaks to the shrinking geospatial world with an increased demand for the immediacy of all things including music. Music will always be something that humans want and even need, but how music is consumed, commodified, and packaged will continue to change and the options will only continue to grow as technology and its relation with the human experience evolves.

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