

The distinctiveness of Electronic Dance Music. Challenging mainstream routines and structures in the music industries

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Abstract

To what extent is the Dance (or EDM) genre distinctive, when compared to the structures currently present in the dynamic music industries? We have combined a literature review with a qualitative analysis through interviews with prominent Dutch Dance label owners, in order to answer this question. The analysis shows that the Dance genre is not compatible with the existing models developed by Negus and Hesmondhalgh, used to explain the structures and the (power-) division within the music industry. The article looks at the unique characteristics (e.g. the 'digitally born' nature, the absence of majors and the live revenue focus) of this genre and what this has meant, and means, amidst all digital advances, for its development.

Keywords: Electronic Dance Music, Dance music genre, independent music production, Dutch Dance, music sociology, music economy.

1 Introduction

In the current digital age the music industries are experiencing turbulent times in which standards set decades ago are put to the test. According to some a paradigmatic change comparable to the one in the 1950s

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(with the arrival of Rock 'n' Roll) could be at hand (Leyshon et al. 2005). Two developments lie at the basis of this presumed paradigmatic change.

Firstly, there has been a shift in the way consumers experience music. A steadily growing number of consumers use digital channels for music consumption. Subscription services like Spotify are especially attractive when considering the 44 per cent growth of members in 2012 worldwide (IFPI 2013). Simultaneously, in revenue terms the live-industry is on the verge of outgrowing the recording industry (Page & Carrey 2009; VNPF 2009, 2010). This is indicative of the way the industry is moving; audiences currently prefer music access and experience to ownership of physical carriers (De Meyer 2010; Wikström 2010).

Another major change is the growing influence of independent record labels in the recording industry, fostered by digitisation. For them, it has become possible to create and distribute music without the "intermediation" of previously crucial 3rd parties (Frith 2001; Leyshon 2001: 50; Jones 2002: 222; De Meyer & Trappeniers 2007). Barriers to entry have diminished due to lower capital requirements and reduced control of distribution channels (Porter 1979; Rothenbuhler & McCourt 2004). Also, the digital music carrier has significantly reduced the previous economies of scale that most benefited the majors, as there is no longer an increased margin on record sold (Rothenbuhler & McCourt 2004). Simultaneously, the consumer has the option of consuming music through a more diverse set of channels (i.e. not just mass media) (Connell & Gibson 2003; Tschmuck 2006). This leads to less controllable (i.e. more varied) listening behaviour of the public (Anderson 2006; Peitz & Waelbroeck 2006). Negus (1999), Connell & Gibson (2003) and Leyshon et al. (2005) argue these technological, economic and socio-cultural developments have given rise to a more 'democratic' industry when compared to the existing oligopoly. Indeed, in the Netherlands major corporations have lost market share to independents in both record sales as well as returns on live shows (NVPI 2006, 2007, 2008, 2009, 2010; Page & Carrey 2009; VNPF 2009, 2010)

With this, the industry currently appears to focus on diversity rather than quantity; more diverse music from a larger group of artists is being consumed while models benefiting the mass distributors (i.e. majors) have diminished in importance. One might conclude that the autonomous small-scale production (cf. Bourdieu 1993) by 'prestigious' independents has prevailed over the 'commercial' mass market-driven production by majors (Hesmondhalgh 2006). However, it has been argued that streaming services like Spotify could herald a return to a system based on mass consumption (i.e. a system beneficial to majors) as mass listening crowds would once again be necessary to make a profit (Rothenbuhler & McCourt 2004; Wikström 2010). These changes pose an unclear image of the future in an industry already based on uncertainty where "failure is the norm" (Frith 2001: 33; Negus 1999).

Against the backdrop of such changes, this paper focuses on the Dance genre (or EDM or Electronic Dance Music as termed in the US). We look at how this genre has developed since 1999 and how it has functioned and still functions within the music industries. We argue that the EDM genre has been able to develop autonomously as a distinctive genre due to its digital nature as well as a specific infrastructure. The latter was particularly strong in The Netherlands, which may partly explain the hegemony of Dutch EDM. This article commences with a review of theories, which may explain the position of Dance music. Subsequently, we present the findings from our interviews with independent Dance label owners. We have chosen the year 1999 as a starting point, as Napster was introduced in that year and it may thus be considered as the start of the era of digitalisation (Handke 2010).

Dance music as a genre is worthy of dedicated research for a number of reasons. Firstly, the digital state of this genre, along with its assumed "placelessness" (i.e. not culturally bound) (Connell & Gibson 2006: 260) is seen as suitable for present and future (Tschmuck 2006; Van der Graaf 2010). A continually digitalising and globalising world where geographical barriers are presumably no longer binding and markets can exist in an abstract digital space based upon interests, seems likely to fit this universal genre (Levitt 1983; Tschmuck 2006). This makes

it interesting to see how Dance labels cope with the developments at hand.

Secondly, this genre seems to have developed outside the prevalent indie-major structure we know from labels in mainstream genres such as Pop and Rock (De Meyer & Trappeniers 2007). In the past, majors have not prominently placed Dance in their portfolio (Hitters & Van de Kamp 2010). Although several Dance acts are signed to majors, grassroots independent labels are still mainly in control of this successful part of the industry (Hitters & Van de Kamp 2010). Examples are Armin van Buuren with Armada, Laidback Luke with Mixmash Records and the Prophet with Scantraxx Records. Also new, globally successful artists choose to be signed to Dutch independent labels (e.g. Martin Garrix to Spinnin' Records). This is remarkable when looking at the vast, still growing, international (live-) success, as it has proven to be a dominant force in music (Rutten & Hoogendoorn 2006; Kroeske & Fictoor 2013). In the 1990's, majors showed a notable reluctance in embracing this genre (Hesmondhalgh 1998; Negus 1999; Hitters & Van de Kamp 2010). A question to ask then is, how this genre has managed to develop autonomously, without support of powerful majors?

Thirdly, Dutch EDM labels and artists are of particular interest, given the relative success of Dutch DJs in the world market. Dutch DJs feature prominently in the highest positions of the yearly DJ Mag's list of best DJs for a number of years consecutively, which is quite surprising given the size of the country. Dance is The Netherlands' most exported music genre, accounting for some 75 percent of all exports, amounting to €120 million in 2013. Dutch DJs have played almost 10.000 shows abroad in 2013 (Kroeske & Fictoor 2015). Thus, looking closer at the Dutch market and its characteristics may prove useful in order to further our understanding of the backgrounds of a successful new genre.

We researched the distinctiveness of the genre by making use of two models; Bourdieu's adapted model of cultural production by Hesmondhalgh (2006) and Negus' (1999) claims about the structures of music labels and the division that exists between major and independent labels. These frameworks inform our understanding of this industry

and give us the tools to analyse this genre's specific structure and relevance.

2 Theoretical Framework

2.1 A changing industry

The recording industry continuously needs to adapt to technological innovations. Due to decentralisation and disintermediation, labels are forced to adopt new structures and strategies suitable to the current era and its technologies (Negus 1999; Connell & Gibson 2003; Leyshon et al. 2005). Labels that are progressive in adapting to these changing circumstances usually gain most from them (initially) (Dowd 2006; Tschmuck 2006). As independent labels have, through history, proven to be more progressive in their strategies and ways of working, it is not surprising that they gained market share (Frith 2001).

As in the 1950s, the independents exploited their possibilities while the majors lost (a part of) their dominant position because of their reluctant and risk-averse attitude towards adopting new technologies (Negus 1999; Dowd 2006). As Tschmuck puts it: *"The representatives of the old paradigm [majors] will ignore the new regime, and then they will try to prevent the new regime from taking over. In the end they fail at this task, because the old regime is no longer able to control all of the simultaneously altering factors that cause this change"* (Tschmuck 2006: 210). This conservative stance in order to preserve control over a changing environment is described as one of the major pitfalls in doing business. This aversion to risk *"means a reluctance to consider truly creative ideas and truly quantum changes"* (Mintzberg 2000: 203). Their attitude however is not surprising; the Internet is regarded as having destroyed the hugely profitable way of working the majors had in the 1990s (Leyshon et al. 2005).

The reluctance can also be explained through mimetic isomorphic processes that are present in this industry. Engaged in an environment led by uncertainty in which roads to success are unclear, these organisa-

tions appear to have adopted each other's structures in order to achieve success. However, through this a field is created in which innovation is hard to convey and in which less institutionalised (i.e. rigid) organisations can thus benefit (DiMaggio & Powell 1983).

The processes above have given way to independent labels profiting by re-capturing market share ever since the decentralisation of production, distribution and promotion channels; i.e. the breakdown of barriers to entry, has taken place (Porter 1979; Longhurst 1995; Negus 1999; Leyshon 2001; Connell & Gibson 2003; Tschmuck 2006). Apart from the growing possibilities of setting up a record label and distributing/promoting music independently, a stimulus also comes from the consumers who seem to be more engaged to try more, diverse music. Because it is more convenient and there are fewer consequences to sampling music, consumers are less risk-averse when considering what music to listen to (Peitz & Waelbroeck 2006; Wikström 2010). This has led to a longer 'tail' in music listening (a wider standard deviation of diversity) and has benefited more obscure musicians and their representative labels (Anderson 2006).

These developments not only caused independents to regain a significant part of the market share in the industry; a niche- 'major-less'-market, has been able to evolve. Frith (2001: 50) argues that a niche market emerged next to the existing, 'traditional mainstream' Pop-Rock market, which the majors currently dominate. Because of the breakdown of barriers in intermediation ever since digitalisation, music can be produced, distributed and consumed through niche channels that function autonomously from the formerly exclusive mass-channels (Connell & Gibson 2003; Tschmuck 2006). Artists can present themselves on these channels without the filters we know from the pre-digital music industry (Leyshon 2001; Connell & Gibson 2003; De Meyer & Trapeniers 2007). This offers possibilities for a truly independent market for obscure music.

Although such a market has developed, it should be noted that for a large part this is a market with small audiences and low profits (Connell & Gibson 2003; Keen 2009; Goldmann 2011; De Meyer 2010). Keen

(2009) and De Meyer (2010) are dismissive towards these niches full of 'amateurs', and claim the breakdown of barriers has not benefited the overall quality of the industry, and in fact have made labels (in the literal sense) even more important for recognition. Yet they overlook the fact that the niche-market shows that democratisation of channels indeed has taken place and, most importantly, that complete independence from the majors is once again possible. While majors are still dominantly represented and work next to independents in most commercially viable genres (sub-divisions in their portfolio) (Negus 1999; Van de Kamp 2009), it is important to bear in mind that separate successful markets can exist next to each other.

Dance, then, is hard to place in either the mainstream or the niche markets. One cannot say that all Dance labels are obscure and aimed at small-scale production or not attractive to a mainstream audience and thus commercially viable. Dance appears to be commercially viable 'enough' to be in the mainstream market yet it does not have the major labels that would normally be so dominantly present. With the breakdown of entry barriers Dance has had the chance to establish independently. Through record labels initiated by producers and DJs it has autonomously achieved a substantial market share in the Netherlands and elsewhere and continues to do so (Van de Kamp 2009; Kroeske & Fictoor 2013).

2.2 Dance and cultural production

To understand the position a genre has within an industry it is crucial to know how this industry of cultural production works. Hesmondhalgh (2006) has adapted Bourdieu's acclaimed work on cultural production to the popular culture of the music industry, in order to understand the divisions of power therein. He distinguishes highly autonomous small-scale production on the one hand, and highly adaptive large-scale mass production, on the other.

Mass production is oriented towards making commercial goods that would fit to the outside market (*pull*). The parties involved have high levels of economic power and are in the most powerful positions within

the 'social space', yet they are not highly regarded for their cultural production. Small-scale production is focused on 'production for producers' (Hesmondhalgh 2006: 214) and is seemingly oblivious to the market and its demands (*push*) (Negus 1999). These latter producers are highly regarded in terms of cultural capital yet have low levels of economic capital and far less powerful positions in the social space.

As Hesmondhalgh (2006) notes, the small-scale and mass production opposition is very familiar to the division of majors and independents in the mainstream popular music market Frith (2001) describes. In this view, majors are solely market-driven and inclined to follow existing demand. In fact, market research is used to achieve this. With this, there is a constant struggle between artists and marketing; the artist wants as much creative freedom as possible while the marketing department is in search of as many (illusory) securities in order to keep maximum control in this uncertain industry (Negus 1999; Hesmondhalgh 2006: 225); "The recording industry's structure, therefore, is characterised by attempts to isolate and control sources of uncertainty" (Rothenbuhler & McCourt 2004: 246). Concurrently, the intrinsically motivated small-scale independent labels are not focused on the market wishes at all; they make "art for art's sake" (Hesmondhalgh 2006: 213).

Hesmondhalgh (2006) contests this distinction between profit-driven mass production and small-scale artistic cultural production and claims the situation is more nuanced. He argues that the most canonised acts in rock history (Beatles, the Beach Boys) were immensely popular and profitable (and thus mass production). Likewise, Hibbett (2005) claims that independent artists (and their audience) hide behind the notion of 'artistic' music and authenticity in order to explain their lack of success. The indie market is described a market where 'the loser wins' as they dismiss the pursuit of success (because they are not successful). This is a difficult struggle for musicians since not all of them live the romantic notion of 'artistic' independence Hesmondhalgh (i.e. Bourdieu) and Hibbett (2006) describe. Many musicians are just not considered good enough (i.e. economically viable) to be signed by majors. Moreover, majors also sign deals with 'independents' regarding distribution,

licensing or financing and such deals have been indispensable in the pre-digital age. The two markets are thus not, or no longer, clearly separated (Hesmondhalgh 2006). Negus (1999) even claims that the distinction can be removed completely; although independents operate differently, they are all integrated in the major's portfolio once proven successful.

Although times have changed and a greater independence from majors is possible, the blurred division between intrinsic small-scale production on the one hand and mass production aimed at the market on the other is still present. However, in the rather 'major-less' Dance genre this division manifests itself in a different way. Judging from the discredited binary division, Dance labels and artists are supposed to be small-scale and not aimed at the market. However, this genre as a whole cannot be considered a movement purely based on artistic production and free of market-driven motives. Distinctions can be made between for instance, the alternative Warp label with its 'indie-like' structures and XL recordings which is a more market-oriented label).

This means that certain parts of the industry are, like majors, market driven and keen to see the development of Star artists while others reflect the oppositional 'indie' culture that exists among independents. Because not all Dance labels are dismissive of commercial success (as are other independent labels and artists) (Hibbett 2005), some have filled the space of the absent majors in the independent market (Hesmondhalgh 2006). The Dance genre has developed independently with a unique structure. Characteristic of this structure is the establishment of labels by the artists/producers themselves; e.g. Armin van Buuren (Trance DJ), the Prophet (Hardstyle DJ), Laidback Luke (House DJ) have all established their own labels (respectively Armada, Scantraxx, and Mixmash Records). Dance is thus a genre full of independents; but how do these labels correspond to the independents in the mainstream market? To what extent can we consider Dance labels as distinctive and how do they embody this distinctiveness? And is there a difference between the Dance labels themselves due to the absence of 'major' counterparts?

2.3 The Dance genre: field and case description

Dance has been a very successful genre for the past few decades (Hesmondhalgh 1998). Growing from an underground scene it has proliferated and is unlikely to stop when considering the continuing success of EDM in the US (3voor12 2012; Guardian 2012, Langdon & Lai 2013). In particular earnings from (international) bookings are growing as exemplified by the export value of Dutch Dance, which has grown by 26 percent in 2013 to € 110 million, mostly thanks to live shows by Dutch DJs in the (US) Dance (Kroeske & Fictoor 2015; EVAR 2015). With this growing market, it is not surprising that the Netherland's largest party organiser ID&T was acquired by a US promoter (3voor12 2013). According to Langdon & Lai (2013) the attendance for the top 50 EDM festivals was double the number of those who attended concerts for all the other music genres combined. Between 2009 and 2013, attendance at concerts and festivals for other music genres declined by 8.3 percent, while attendance at the top 20 EDM festivals grew from 1.9 to 3.5 million. Apart from live, it is also interesting to see that EDM is suffering less from declining record sales than other genres. EVAR (2015) claims this is due to the relatively young consumers of EDM switching more quickly to digital sales. Curiously enough, the potential for this genre was already predicted. In fact, seventeen years ago, Hesmondhalgh (1998: 247, 248) was certain that majors would integrate Dance into their portfolio and thus into the mainstream. Dance had started to generate 'big' acts, like the Prodigy, similar to marketable, lasting mainstream Rock stars (or "entertainment packages" as Negus (1992: 7) calls them) With this emergent "rock-style star system" in Dance, it just seemed a matter of time before Dance would be incorporated into the mainstream sector (Hesmondhalgh 1998: 247).

Hitherto, majors have not significantly entered the Dance genre. Hitters & Van de Kamp (2010) have researched the Dutch Dance market and explain the continuing absence of majors from the distinct structures and strategies Dance labels would still have. With the focus mainly on the live club-experience rather than on the artist and record/album sales, Dance would be too distinct for the majors' way of working

(Hesmondhalgh 1998). As there is a fast turnover of styles and fashions, this is a genre that builds on the release of separate singles or EPs in order to boost frequent live performances. This offers little foundation to build lasting stars with album releases (Hesmondhalgh 1998). The potential 'Cash Cows' or 'Stars' from the BCG-Matrix (with little risk but high market potential) that the majors search for, are hard to find within this genre. Dance has remained a 'Question mark'; difficult to predict while hard to integrate within the existing structures and strategies (Day 1977; Negus 1999; Wikström 2010). Contrary to Hesmondhalgh's (1998) expectations, majors still regard this genre as too distinctive to fit into the existing norms through which they work. In fact, with the continued absence of majors, 'Star DJs' like Armin van Buuren or Laidback Luke have been able to set up their own firms in which they could create a platform for their own music style for other DJs to join (when considered fitting for the label, figuratively and literally speaking). Due to their expert knowledge, these genre specific labels have proven to be very successful domestically as well as internationally.

Negus (1999) provides another explanation. He talks about this industry as a US and UK oriented one. All music is mirrored against the deeply embedded characteristics of these markets. This makes 'continental' music risky when compared to music from their domestic markets and that subsequently reinforces the dominance of the UK and US in the music market. Music styles that are appreciated in one of these markets are picked up. This could also explain why (Dutch) Dance is overlooked so far and an independent market could develop, despite its claimed "placelessness" (Connell & Gibson 2006: 260).

Dance and EDM are still a mainly independent genre. It could be that Hesmondhalgh has misjudged the unconventionality and incompatibility of the genre to the structures and strategies majors employed (i.e. risk of this genre) (Hitters & Van de Kamp 2010). It could also be that digitalisation itself has led to the withdrawal from the genre that seemed so ready for its integration. From 1999 onwards majors shrank their portfolio of artists and repertoire to avoid further risks (Leysdon et al. 2005). The unconventionality

and the downturn following the initial phase of digitalisation thus probably made the majors (more) anxious to continue integrating this new genre in their portfolio (Negus 1999; Hitters & Van de Kamp 2010). The possible reasons behind the absence of majors are further discussed in the interviews.

3 Method

In order to understand the characteristics of this distinctive genre and the place Dance has within the current industry, this study combines a literature review with a qualitative study. The literature review focuses on the industry as a whole and is used as a reference to understand the Dance genre in its (non-) distinctiveness from the MOR and Pop/Rock genres.

For the Dance genre, we adopted an explorative research method as little empirical research has been done recently (Hesmondhalgh's 1998 pre-digitalisation research has been the most fundamental study on Dance). With little foundations, a qualitative research was the only appropriate method for this study (Punch 2005; Sarantakos 2005; Hijmans & Wester 2006). Interviews with experts from within the industry were considered the best opportunity to retrieve specific, detailed, unexpected information (Punch 2005; Sarantakos 2005). As rich descriptions, rather than pre-defined answers to questions, have been the goal of this study the interview is a fitting research method (Roulston 2010: 136). In this study the owners of seven Dutch Dance labels, of different disciplines and sizes were interviewed. It includes four of the five largest EDM labels in the Netherlands and covers 5 DJs that have been in the DJ Mag top 10 over the last years (Kroeske & Fictoor 2015).

The method of *purposive sampling* was used in order to provide a more varied group of respondents (Hijmans & Wester 2006: 512). See appendix 1 for detailed information on the interviews with labels. The input for the interviews has been gathered from the literature review. This has been distilled to a topic list used in the interviews, giving the qualitative semi-structured interview a solid foundation in theory (Braun

& Clarke 2006). We thus use a more theoretical approach to thematic analysis, in which a renewed insight from the literature can drive a change in the qualitative research method. However, we have also allowed for themes to be inductively gathered from the data during our analysis. With this, the research is also embedded in data (Charmaz 2006: 2). The complete interviews are transcribed in separate files and arranged by themes. These themes were developed from the interview data through a process of systematic thematic coding (Braun & Clarke 2006).

The interviews themselves have been based around three models. Frith's (2001) model gives an understanding of the division of the current 'digitalised' environment, whereas Hesmondhalgh's (2006) model looks at how majors and independents act, relative to and distinguished from each other. Finally, Negus' study discusses the majors' way of working in the industry. The first study is useful as it gives insight into how Dance fits in the current model. The second is relevant as this model captures the structure of the 'traditional' division of roles and is thus comparable to the unusual 'major-less' structure of Dance labels. The last one can help understand the majors and might illuminate the future division within the Dance genre, with or without the majors?

4 Results: Dance's distinctiveness

4.1 Theme 1: Different state: digitally born

Dance is an electronic genre. This makes it very suitable for the digital era as it is digitally created (Tschmuck 2006). It is a genre where few facilities are necessary to create and distribute music. The bedroom studio is a frequently used example, and autonomous production has been a 'normal' practice for longer than in other genres. Labels interviewed argue that this has created an apt way of working in the current digital era. Digital production and distribution has broken down the necessity of using the channels tightly controlled by majors (Leyshon et al. 2005).

The Internet made it far easier for us to distribute our own music. Besides, a record is never out of stock. A record is always available and can travel around the globe without anyone able to stop it. (Label manager Maykel Piron, Armada, 5 May 2011 (AMP))

Due to the digital state of the music itself, electronic Dance music has been one of the fore-runners in using the new available digital channels. Simultaneously, with the departure of majors from the Dance genre ever since digitalisation started, the need arose to set up autonomous independent labels (Hitters & Van de Kamp 2010).

An example of this, is the decision of Maykel Piron to leave Warner (who in line with Hesmondhalgh's (1998) belief that majors would enter the Dance genre, initially had the idea of setting up a Dance subdivision) in order to establish a Trance label based around Armin van Buuren (Armada Music). What is more, all the other labels interviewed were also established after 1999. This is no coincidence. All the labels affirmed that the majors have taken steps to incorporate the genre, yet left it due to the turbulent times that existed. *"They did not want to have anything to do with Dance anymore."* (Bas Kaspers, label manager Cloud Nine Music, 3 May 2011 (CN)).

Due to the breakdown of barriers and departure of majors, Dance literally became independent, contrary to the more blurred relationship in 'mainstream' genres where a major-independent connection had been established and preserved (Frith 2001; Hesmondhalgh 1998, 2006; Negus 1999). However, now that Dance seems to be a stable, viable factor in the current industry, the majors would be willing to integrate Dance once again, especially if the growing streaming services could indeed bring recovery to the mass industry model (Wikström 2010). This development verifies the major's risk-averseness (Mintzberg 2000) described by Wikström (2010): *"Majors first want to see which way the wind blows. And now, as everything seems to be in place, react."* (Georges Kool, label manager Mixmash Records, 15 June 2011).

4.2 Theme 2: Different focus and way of working

This distinctiveness is what most interviewees claim to be the primary reason for their 'independence'. They state that their independence (i.e. the absence of majors) is driven by their own focus and way of working, digital state and attitude towards digitalisation; filling the gap left by the more traditional major labels. It is argued that a different focus is the prime reason for the splitting of paths; labels in Dance primarily focus on generating live revenue and club hits (rather than hits in the charts) that could possibly evolve into radio hits. *"We mostly do club hits and occasionally have a hit on the radio next to this"* (Justin Tatipata, label manager Be Yourself Music, 19 May 2011 (BY))

Some records are signed because you know they are club hits. But a major label is not interested in a turnover of 500 or 1000 euros in a certain country. If you release Madonna and sell 400 000 albums, the focus should not be on releases that are purely for the club. That should be left to an independent. (AMP)

The club would be the 'niche' phase Frith (2001) described prior to a possible mainstream success. As described by Hesmondhalgh (1998) before, Dance primarily moves from the club and outside the mass media (initially); *"it is a kind of approach before the commercial trajectory. The promo starts with the real DJs, the club DJs"* (MR). Labels primarily use niche channels to distribute music: *"we don't need to be on TV. They [consumers] need to come to our [YouTube] channel. Somewhere where you can only come if you know it"* (Rudy Peters, label manager Scantraxx Records, 26 May 2011, SR).

It is difficult to skip this phase as interviewees claim that the live experience and hits are interrelated to each other in this genre: *"Everything that happens at parties, is reflected in the download store"* (BY). Majors are unwilling to go through this unpredictable phase (Hitters & Van de Kamp 2010):

A lot of records are produced without being obvious hits. Yet they grow in the club. That's something majors don't want to invest in, as they want to skip this phase (AMP)

Apart from the focus on clubs, tracks are primarily released as loose singles or EPs. With the focus on releases of such format, this also diverges from the traditional mainstream focus on album releases. Due to the club orientation and volatility of the genre, album releases are not the norm. Most Dance acts are not solid enough to build a heavily marketed album around them as in the "rock-style star system" (Hesmondhalgh 1998: 247): *"Artists need to show their face a couple of times a year with releases to remain noticed. [...] There are a lot of one-off things. After three tracks, it can be over with your number 1 artist. It happens"* (SR).

Thirdly, what comes into play is that Dance acts are not clearly recognisable or apprehensible (and thus marketable) in comparison to bands; acts like this are harder to fit into the traditional format the majors use. A label presents Cascada as an example:

If you have a Dance act, you can't do much with it. Cascada used to be a project name. Ever since the singer joined the group they had a clearer image. It became apprehensible. I have the idea that it should be tangible for a major to work" (Cees van der Zwam, label manager Spinnin' Records, 14 June 2011 (SPR))

Finally, it is argued that majors are too slow for this dynamic genre: "a bigger company also means a company with more difficulty to react to developments. That's the inflexibility of such a company. This can work against you, especially in a heavily dynamic sector" (Christiaan Macdonald, label manager Rush Hour, 26 April 2011 (RH))

4.3 Theme 3: Genre identification

While Dance is still a genre dominated by independent labels, commercially viable stars have also emerged in the mainstream market. Such mainstream success is generally frowned upon by the labels interviewed. Illustrative is this comment about David Guetta: *"David Guetta is on EMI, but that's not Dance music any more in my opinion. It has become ordinary pop music"* (AMP)

While some movement has come from majors to incorporate several well-known DJs (e.g. David Guetta, Calvin Harris), the interviewed labels claim that such artists no longer create 'real' EDM anymore as they have adapted to the major's ideas of music crafting. In doing so, they suggest that when artists leave Indies for majors, they are no longer EDM, thus keeping the distinctiveness of EDM as a genre intact.

The argument is supported by the fact that the majority of star DJs remain loyal to their independent label (a label that they often have set up themselves). As these labels have been able to keep their own distinctive style and, with that, grow to greater heights internationally than independents in other genres, there is less urgency to transfer to a major label in order to reach international success. Moreover, their own label ensures their creative freedom. While majors do not necessarily impinge on this freedom, the interviews suggest that artists become more mainstream when signed by a major.

Even though Armin van Buuren and Laidback Luke are successful globally as well, they are regarded (or regard themselves) differently. They are 'true' Dance artists with their own sound, not aimed at what the market wants. In this sense, they are the small-scale artists Bourdieu talks about. They consider themselves as distinct from mainstream/commercial artists (Hesmondhalgh 2006). Most interesting is however, that a label like Armada uses similar mass media as majors, yet the label manager classifies this label as different.

It is interesting to see that identification of these labels takes place similar to independents in other genres; they hide behind the notion of 'artistic' music and authenticity in order to distinguish themselves and to, in some cases, justify their lack of success (Hibbett 2005). Moreover, the creation of sub-genres (e.g. Trance and Techno) is also a common practice in this genre in order to create recognisable labels in order to keep an overview in an era where the choice of music is immense.

4.4 Theme 4: The creation of an autonomous genre

The absence of majors has contributed to the appearance of grassroots independents that have independently grown to the internationally successful labels that can compete with the newly established Dance divisions of majors (De Meyer 2010). In this respect, Dance differs from mainstream pop/rock, where independents invest in artists and majors reap the profits. In Dance, artists are not only grown but can also be retained by the labels. Although a possible growing focus of majors on this genre exists, nonetheless label representatives doubt whether they will succeed. This marks a distinctive new path for these labels, as it is commonly assumed that independent artists will be integrated in major's portfolios when proven successful (Negus 1999).

While democratisation has enabled autonomous production, distribution and promotion, the labels agree that digitalisation has made their task as a label even more important. They argue that, with the breakdown of barriers, the influx of artists is so large that labels, as filters are once again necessary for consumers in order to keep a clear overview. Labels now function as gatekeepers in order to provide a sign of recognition (e.g. Armada Music signifies that signed artists are Trance artists) and of quality in order to be found by the public: *"Scantraxx is an institution. As an institute, you try to push the talents with quality forward. With that, you can promote new music"* (SR)

In the absence of the majors, the independents have taken the chance to grow internationally. The labels interviewed however, doubt whether the majors will be a dominant force in this genre in the future.

We have the same range, also across borders, compared to a major. I think that, if you have a clear vision and recognisable face it will be more attractive for artists to go to such a label, rather than a more faceless major with tons of projects. Moreover, it's naturally very attractive to be signed to the label of, for instance, Armin, as a beacon of the genre. (CN)

4.5 Theme 5: Dance, the third market

Dance appears to have created a market on its own that the majors will have difficulty to enter (and progressively dominate). The autonomous niche market that has evolved, in contradiction to Frith's (2001) theory, is economically viable. Consequently, a 'third market' has emerged; next to the amateur or non-viable niche market and the economically viable mainstream market. It is a market in between niche and mainstream (Frith 2001) and in between small scale and large scale (i.e. not just "art for art's sake") (Hesmondhalgh 2006: 213).

Interestingly, the new market also differs from the traditional major-independent power division (Negus 1999). It appears to have its own internal major-independent division. With the arrival of Spotify, the focus once again seems to be on a more mass-market industry. As the market has grown over the years and independents within this industry have developed in their own way there could be a split within this genre itself. Independents with big-selling artists (Armada), a large back-catalogue (Be Yourself) or a lot of marketing power (Spinnin) can work with mass-market audiences through streaming models like Spotify. There seems to be a separation within this further mostly autonomous independent market. Large labels on the one hand strengthen their current position while smaller labels on the other hand lose their market share. This theory is supported by the labels involved: *"you really need to have a 100 million views or plays if you want to earn 10 000 euros. Since that's only possible for 10 artists I'm not sure what to think of it."* ('small label' RH). *"At first instance I wasn't too positive about Spotify, but now that it brings up serious money, also for us, I am"* ('larger label' AMP). *"That's where the profit is: the mass. So if you have a lot of subscriptions, you can earn more. There are a lot of bread crumbs of which you need to have a lot of good ones."* ('larger label' SR)

It can thus be concluded that the Dutch Dance industry has established an autonomous global market. With the growing viability of the market and the continuing absence of majors, a market next to the ones identified by Frith (2001) has emerged. With the growth of new streaming music consumption, a similar differentiation between large and small

labels can be observed, among the independents in this genre. In other words, several Dutch Dance independents have grown to a position similar to majors in the mainstream market, due to their big selling artists, marketing power and large back-catalogue.

5 Discussion & conclusion

In this article, we researched the distinctiveness of the Dance genre. We have clustered the group of Dutch Dance labels researched by the very classification these labels use; they view, and thereby classify, themselves as distinct from others. This article takes this classification as its starting point, as the record labels themselves use the genres as a classification tool (Hitters & Van de Kamp 2010; Negus 1999). While we have found significant support for the group of labels investigated indeed being distinct, it is important to note that the classification has evolved from this perspective.

When considering its distinctiveness, it can be concluded firstly that these Dance labels operate in a 'third', separate, independent market. As the genre is almost solely supported by independent labels and functions without interference from majors, it has developed an unusual market structure and power division compared to the mainstream genres we know. Moreover, considering that it is globally one of the most commercially viable genres, it is distinct from both the amateur, niche-market(s) portrayed by Frith (2001) and Keen (2009) as well as the mainstream markets. With this, Dance has a market which functions independently from the majors (and their mass channels) yet is profitable enough to be considered more than a niche. Digitalisation has contributed to the development of this 'third' market. The progressive attitude of the majority of smaller labels towards digitalisation, contrasts with the conservative attitude and isomorphic processes of majors. The result is a democratisation of distribution channels, a wider range of music consumption (very important for a universal genre such as Dance) and a longer tail of listening.

Consequently, key to understanding the current absence of majors in the Dance industry is the conservative attitude towards digitalisation they (have) had (Leyshon et al. 2005). The anxiety about the impact of the Internet has fuelled risk averse strategies and has led to a slimming-down of their portfolio. This appears to be a key moment in the establishment of the separate market Dance currently is. Otherwise Dance, with a growing profitability and rise of Star-artists, could well have been integrated by majors. While Dance has always had a different way of working, the fact that majors were too risk-averse in turbulent times might be the most crucial factor to explain the independent structure of this genre.

Secondly, while Dance now has a distinct place in the music market, this does not mean the market and its labels have uniform structures and practices. Although Dance in the current form is set up *independently*, strategies of some of the grassroots labels seem to be converging towards strategies considered typical of the majors. While smaller labels and 'new' artists still predominantly focus on frequent single-or EP-releases and live performances due to the fast turn-over of styles, most established artists no longer follow this path. As they have proven to be sustainable amidst all developments, they can be promoted as the star-artists (album-driven artists) familiar within the mass-scale, mainstream genres (Hesmondhalgh 1998). The potential of this genre seems to have enhanced strategies focused on growth and profitability similar to the ones majors use. Due to this, labels with more successful artists progressively use the same practices and channels as mainstream, mass-market focused firms (cf. Hesmondhalgh 2006) (without in fact being such a major label). Furthermore, the convergence can also be observed in their attitudes towards repertoire building and streaming services like Spotify. Consequently, despite the fact that Dance labels view themselves as genuinely different from, and more authentic than major corporations, their distinctiveness from 'traditional' labels is diminishing.

Subsequently, although the risk-averse attitudes of majors might have been the crucial factor in explaining the independent structure of this genre, their practices have found a way into this genre, as

Hesmondhalgh (1998) predicted. We clearly observe a division between labels with well-known (cross-over) artists and smaller, more obscure labels. With this, the binary division of small-scale versus mainstream, described by Bourdieu (1993) also seems to have slowly evolved once more in this new genre. Like in other genres (e.g. Hip-hop) or initial independent cultural sectors, the small-scale "art for art's sake" attitude cannot remain forever (Hesmondhalgh 2006: 213). Incrementally, cultural production fields like this always seem to end up in the binary division described. Hesmondhalgh (1998) is correct in pointing to this distinction; no (longer) can corporations be called solely profit driven; and no (longer) can all independents be seen as solely art driven. While a binary division exists among Dance record labels, the line between the two sides is sometimes hard to pinpoint. Dance, while appearing independent on the surface, is a good example.

Third and finally, what the future will bring is hard to tell. It is not likely that majors will enter this market. The Dance labels in our research claim that their brand building, professional and loyal, pro-active audience, along with the level playing field due to digitalisation, has given them a strong position against the possible intrusion of majors. The distinctive characteristics of the EDM genre are a barrier for majors. Nevertheless, the growth of the genre in the US has made this, predominantly European, genre progressively harder to ignore. So, along with the rise of subscription services that are most beneficial for parties serving mass listening crowds, majors could have found a way to cope with digitalisation and could quite possibly start diversifying their portfolio once again, starting with Dance.

Our study has focused on Dutch Dance labels, while our findings suggest that their characteristics may also be found among Dance labels in general see e.g. the presence of international Dance indie labels in Germany. Indeed, Dutch labels are very prominent internationally, which may be due to a particularly strong infrastructure of EDM parties, festivals, labels, and clubs, as well as high technological advancement and a permissive youth culture. However, our findings support the conclusion that the worldwide success of the genre has emerged as a 'third'

market next to the existing major-dominated market for mainstream popular music. The extent to which this is a specific path-dependent trajectory for the dance genre, or whether this may also be observed for other genres proposes a challenge for future research. This study gives a solid foundation and a good insight in the current distinctiveness of the Dance genre, yet the (near) future might be of vital importance in the further development and distinctiveness of this genre. Now that majors appear to have found successful ways to start coping with digitalisation, it will be interesting to investigate what strategies they will use for this genre. Further explorative studies might give insight in what the future will bring for this fast-growing genre.

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