

DIY Hip Hop & the Power Structures of the Music Industry

The Growing Impact of DIY Hip Hop

Student Name: Hermon Habteyesus

Student Number: 411896

Supervisor: Dr. Erik Hitters

Media & Creative Industries

Erasmus School of History, Culture and Communication

Erasmus University Rotterdam

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ABSTRACT

This thesis examines the impact of local Do-It-Yourself (DIY) hip hop artists on the roles of intermediaries. Both hip hop music and independent music are now more popular than ever, while the major record labels – Universal, Sony and Warner – are losing some of their traditionally dominant power at the same time. To find the perceptions of contemporary DIY hip hop artists and their impact on the industry, nine in-depth interviews were performed with hip hop artists and experts. The results firstly show that the esthetic boundaries of hip hop music has been broadened since digitalization of the industry. In the past, the supply of physical music was rather closed due to the gatekeeping role of the majors, but streaming platforms have now empowered consumers by opening up the supply of music. The result is that the public started to accept hip hop music with lower (or cheaper) production quality, empowering DIY artists who reject involvement from corporate investors like major record labels based on personal values. The belief in independent success of hip hop artists is apparent, just like the DIY ethos strongly seems to be present in hip hop music. This identity of contemporary DIY hip hop artists can be a threat to the traditional power structures of the industry, because this type of artist believes that record labels are no longer required to be successful as an artist. Also, it seems like substituting intermediaries like managers, bookings agents and PR persons are becoming more available to local hip hop artists. This way, DIY artists can avoid large record labels but make (multiple) deals with those other, more service-specific intermediaries. Because of the increased availability of intermediaries, it is expected that artists will typically work with a higher amount of intermediaries than before. Findings suggest that the increase in relevancy of intermediaries will specifically be noticeable in the field of artist management. DIY hip hop artists can reject the involvement of record labels, but the complex music industry still asks for codified industry knowledge to be successful. Managers will therefore act as the bridge to the professional industry for local hip hop artists.

KEYWORDS: *DIY, hip hop, digitalization, music industry, intermediaries,*

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1. Introduction

R&B and hip hop singer/rapper Frank Ocean was signed at Def Jam Records, an American record label owned by Universal Music Group (UMG), by the time of recording his last studio album *Blonde* in 2015 and 2016. However, it was at the same time his discontent for the record label grew. He felt like he did not receive the support that he should have gotten, while the label still proceeded to claim a dominant part of revenues (Rys, 2016). Because Frank Ocean's contract still obliged him to deliver a last project under Def Jam Records, he teased and ultimately released an experimental, minimalistic, and unfinished album in August 2016 which counted as his last contractual project under Def Jam Records, named *Endless* (Rys, 2016). While some fans were still confused about this album, the artist unexpectedly released the *Blonde* album, as an independent artist, within 24 hours, which turned out to be the real album he was working on for the last years. *Blonde* eventually reached 276,000 album sales in the first week and because *Endless* was released as a streaming-only Apple-exclusive video album, revenues for the record label were kept at a minimum (Reiff, 2016).

Music artists going, or consciously staying, independent ('indie') appears to be a growing tendency in the hip hop music industry. Daniels (2019) wrote an article in Forbes about the changing impact of independent musicians in the global music industry, based on findings of research company MIDia Research. Independent artists turned out to be the fastest-growing segment in the music industry at the moment in terms of generated revenue, with an explosive increase of 35% in revenues in 2018 compared to the year before, while major labels showed a more stable growth in the same time period. More specifically, Rolling Stone reported on an estimation by music industry advisory bank Raine: self-releasing artists are expected to generate a revenue of \$2.12 billion from recorded music in the year 2020, while the third biggest major record label Warner Music made \$2.22 billion of the same revenue streams in 2019. Self-releasing artists would then make up for nearly 10% of the total industry of recorded music (Ingham, 2020).

Independent musicians who consciously aspire to keep control of all aspects of their music (production, marketing and distribution) can be described as Do-It-Yourself (DIY) musicians (Den Drijver & Hitters, 2017). While this concept seems similar to the term indie, there is a significant difference that is important to address. The global music industry is currently an oligopoly: three major record labels nearly monopolize the complete industry for recorded music with a combined market share of approximately 70%, consisting of Universal Music, Sony Music and Warner Music, sequenced in size respectively (Watson, 2019). Every other record company or artist in the music industry that operates without the interference of one of these majors is already regarded as independent. DIY artists furthermore, are typically characterized by their personal values: artistic integrity, creative control, and anarchistic beliefs are just some examples of DIY ethos (Bernardo &

Martins, 2014; Den Drijver & Hitters, 2017; Guerra & Costa, 2016). The DIY movement emerged from the British rock scene of the 1970s and 1980 as an opposing reaction to mainstream music and its business, and spilled over to other countries and musical genres in the following decennia (Hesmondhalgh, 1999). Whereas a DIY ethos seems to be present in the rebellious spirit of hip hop culture – from A Tribe Called Quest to Frank Ocean expressing the value of creative control against the interference by majors – many rap artists still express materialistic values in their music, which appears to contradict the DIY ethos. Though, with independent music growing exponentially in the global music market, it seems worthwhile to study how the DIY ethos expresses itself in the hip hop industry. According to Business Insider, hip hop surpassed rock music with being the most popular music genre in the world in 2017, and is still dominating the charts according to recent results from global data research firm Nielsen (Lynch, 2018; Zhang, 2020). Therefore, the impact on the music industry that derives from hip hop's values has seemingly also grown accordingly.

A common current claim is that technological developments of the last decennia have enabled aspiring DIY music artists to build a professional music career. Hracs (2012) explains in his paper how the emergence of mp3 file sharing around the year 2000 stirred up the music industry and had a disruptive effect on the traditional revenue streams of major record labels. Whereas their business model had mainly relied on physical music sales up until that point, consumers could now just download music (illegally) from the internet instead of buying CD's or music in other formats. These developments had a crucial impact on the industry and eventually even caused the bankruptcy of one of the four major record labels of that time – EMI –, indicating the reallocation of some power from the major labels to independent labels and artists (Forde, 2011). The emergence of mp3 file sharing is just one example of impactful innovations of the last decades regarding music production, distribution and marketing that many scholars take in account to determine the current state and role of intermediaries in the music industry (Bernardo & Martins, 2014; Galuszka, 2015; Guichardaz, Bach, & Penin, 2019; Hracs, 2012; Hviid, Izquierdo-Sanchez, & Jacques, 2018; Vaccaro & Cohn, 2004).

The waning impact of intermediaries in the music industry is known as disintermediation, which refers to changing power inequalities, technological disruption and a structural transformation of the music industry (Hracs, 2012; Hviid et al., 2018). Traditionally, a small number of large record labels and publishers possess the power over a large number of music artists, which made it hard for DIY artists to build a professional career in the music industry without working with one of those powerful players. With the impact of digitalization, arguably widening the possibilities regarding the production, distribution and marketing of music, some scholars believe this traditional power of majors has been reassigned to independent artists, suggesting disintermediation in the music

industry (Hracs, 2012). However, other scholars have different perspectives, supposing intermediation of new parties (Bernardo & Martins, 2014; Galuszka, 2015; Hviid et al., 2018). A last take is that the phenomenon of disintermediation was only temporarily because the traditional intermediaries have found ways to re-emerge, leading to reintermediation in the industry (Guichardaz et al., 2019).

Some existing literature thus discusses the impact of digitalization on the role of intermediaries and the related increasing power and freedom for DIY music artists. For the hip hop music industry, it is however unclear how digitalization impacted its DIY artists and if this leads to possible disintermediation in the industry. While most literature on DIY (ethics) focusses on pop, rock and punk music, where DIY always has been a common approach, no research to date has looked at the practices of DIY and its ethics amongst rappers and hip hop producers. Is DIY a common practice in hip hop? How may an increase in professional success of DIY hip hop artists affect intermediaries in the music industry? And to what extent do the artists perceive this as a viable career strategy? These questions logically led to the following research question:

Are DIY ethics present in local hip hop production and in what way does this shape the role of intermediaries?

1.1. Scientific & social relevance

At the time of writing this thesis, a global discourse emerged in the hip hop community, seemingly as a result of recent developments in the music industry. Rapper Russ and Steve Stout, founder of popular music distributor United Masters, had a discussion in an online conference about the hypothetical effect of rapper and singer Drake – one of the biggest music artists at this moment – going independent (Ju, 2020). According to them, Drake deciding to leave his major label and proceeding his career independently would cause a ripple effect in the music industry, with a significant amount of artists following in Drake's footsteps by also going independent (Cowen, 2020). As a result, the music business would be 'done' because the powerful major record labels would lose their grip on the industry. Global media outlets like XXL and Complex reported on this and various hip hop artists reacted to give their own opinion on this matter. The current discourse on this topic really shows how the music industry has changed and new structures can be set in the near future; the impact of independent music was never this relevant (Leight, 2020).

While existing literature has extensively researched the effect of digitalization on the music industry and independent artists, there is a notable gap when DIY and hip hop come into the equation. Focusing on DIY hip hop artists firstly adds a specific value to the field of research because

of the afore-mentioned difference between independent and DIY. Although scholars tend to focus on disintermediation through an industry lens, this thesis additionally aims to reveal perspectives on the role of intermediaries from the bottom-up, by interviewing local hip hop artists with (and without) DIY ethics, supported by interviews with industry experts. DIY artists typically have unique values and thus make different decisions than traditional musicians (Den Drijver & Hitters, 2017). Because of the fast-growing position of DIY music and the current popularity of hip hop music in the mainstream market, DIY hip hop artists are expected to have an increasing impact on the current direction of the music industry as a whole. The interviews with industry experts help to reveal the meaning of the artists' perspectives for the music industry. With all the recent developments and changing structures of the music industry, the outcome of this thesis tries to explain the DIY hip hop artist's influence on the role of intermediaries in the nearby future.

Moreover, there is only little research on the production of hip hop music and its relation to the major-independent dichotomy. The reason for this could be the relatively small impact that the genre had on the music industry up until this point. However, the relevance of studying hip hop has increased immensely now that it is the most consumed musical genre (Zhang, 2020). The research field will in this way consist of a richer spectrum which increases the holistic understanding of the current state of the music industry. Scholars will also be able to obtain specific information on the current state of the hip hop music industry from which they can build further research on. Societally, focusing on local hip hop primarily adds relevant value to local hip hop music artists, who are trying to understand the market in which they aspire to build a professional career while keeping control on every element of the business. By performing this research, the hip hop market will be analyzed thoroughly which will reveal current threats and opportunities for DIY hip hop artists in the industry.

The thesis will be structured as follows: this introduction is firstly followed by a theory section. In this part, an in-depth literature study is performed, which will define relevant concepts, provide context to DIY ethos and the (hip hop) music industry, and reveal perspectives on the music industry of the current research field. The following chapter will be devoted to explaining the methodological choices made for the research. This includes descriptions of and justifications for the used research method, interview context, data analysis and operationalization. After coverage of the methodology, results of the data analysis are listed and discussed, which will serve as the backbone for answering the research question in the last chapter: the conclusion. Besides answering the research question, the conclusion will also summarize the most important findings, do recommendations for further research, and note the limitations of this research.

2. Theory

The literature study will start with a dive into the history of hip hop culture and music, identifying the genre's essence, values, and position in society. Next, the transformation of the music industry will be discussed and relevant concepts such as technological developments, disintermediation and DIY ethos will be theoretically explored, before going into the methodology of this research in the following chapter.

2.1. Hip hop's history

2.1.1. The origin

Hip hop started as a cultural movement among the black youth of the Bronx in New York during the early 1970s. Originally, it consisted of four different elements: disk-jockeying (DJing), emceeing (MCing), breakdancing and graffiti. The roots of these elements helped to develop and popularize hip hop in the earliest stages: small, underground hip hop parties. Rap music, as we know it today, is the outcome of an organic phenomenon that emerged from those early hip hop parties (Keyes, 2004).

In 1972, DJ Kool Herc began mixing records at parties in the Bronx, and he developed a style that was unlike the status quo (Keyes, 2004). While other DJ's were just mixing one record into the other, DJ Kool Herc discovered and utilized the power of rhyming over 'breaks' or 'breakbeats' in other musical genres such as funk and disco. Those breaks were energetic pieces of a song where the focus was moved to percussion instruments. Reciting simple rhymes and call-and-response performances over breaks turned out to be a huge success at those parties. Many other early hip hop DJ's in New York, such as Afrika Bambaataa and Grandmaster Flash, were inspired by DJ Kool Herc's innovative style and helped to furtherly develop and shape the sound of hip hop. Eventually, DJ's were becoming increasingly competitive between each other. To strengthen their competitive position, they started adding vocal performances by MC's during their DJ shows. MC's would take over the vocal performances of the DJ, enabling to specialize in what would later be called 'rapping'. The musical style became increasingly popular in the 1970's, following with different DJ's and MC's sharing their innovative take on hip hop music.

2.1.2. Rise into the mainstream

During these first years of hip hop's new popularity, many people in pop culture thought that the genre was going to be a passing fad. That is why at first, the mainstream record industry and radio stations did not want to partake or believe in investing in hip hop: it were the independent

labels and artists that really pushed the envelope concerning rap music (Rose, 2000). Hip hop artists from independent labels like Tommy Boy, Profile and Def Jam brought in a lot of success unseen before. It was not until 1979 that the genre caught the wide-scale attention of the public, the record industry and the major record labels. This was the year that a new, independent record label named Sugar Hill Records scouted the Sugar Hill Gang and eventually released their first single 'Rapper's Delight'. In two months' time, the single already sold 2 million copies and catapulted hip hop into the pop charts by being the first rap song in the Billboard's Hot 100 (Keyes, 2004). In that same year, Mercury Records signed a deal with Kurtis Blow, which was the first major record company deal with a hip hop artist (Keyes, 2004). Because of this, the trend of hip hop's commercial success due to 'Rapper's Delight' was even taken further; Kurtis Blow and Mercury Records received two gold plaques for their first two singles 'Christmas rapping' and 'The Breaks' in 1980, which were the first gold plaques for a rap song. Since then, majors have become increasingly interested in commercializing hip hop artists. However, this interest did not yet translate into commercial success in the early 1980s (Rose, 2000). After the six majors of that time signed their first hip hop artists, they turned out to not succeed in bringing in the sales that they expected to have; it appeared that the independent labels and artists were bringing in a higher number of sales.

The majors started to realize that independent labels understand hip hop's culture much better than them (Rose, 2000). According to Rose, founders of independent hip hop labels are often entrepreneurs from within that culture. Logically, this means that they possess a greater understanding of everything inside that culture, by knowing and understanding the culture's identity, standards, and trends thoroughly. This enables more efficient artist selection and marketing. With technological developments facilitating cheaper production possibilities than before, independents were able to put this cultural knowledge to work. Consequently, majors created a new strategy in which the competition with these labels is decreased (Rose, 2000). Instead, they started to focus more on acquiring and incorporating independent hip hop labels and putting financial resources in their hands. The hip hop labels would still have part of their own autonomy and input in operations, but with the network and financial backing of a major record label. This way, the majors would be better able to profit from hip hop music, while the subsidiary labels have access to major distribution and much higher production and marketing budgets to create and promote their products on a bigger scale. Some of these hip hop labels are now alongside the biggest sublabels in the world, with Def Jam Recordings as the prime example. Hip hop music has currently grown into the most popular musical genre in the world (Lynch, 2018). Media Outlets such as Rolling Stone and Billboard reported that hip hop music dominated the mainstream market in 2017 and 2018 and this trend seems to have persisted up until now (Leight, 2019; Unterberger, 2019; Zhang, 2020).

2.1.3. Bidirectional critique

The geographical areas where hip hop originated from are notorious neighborhoods in the United States. These 'ghetto's' have been existing in the United States for over a hundred years, and are characterized by racial segregation, poverty and crime (Logan et al., 2015). 'The Message' by Grandmaster Flash was one of the first rap singles that expressed these problems to a mainstream audience. The song was filled with themes like poverty, crime, and drug addiction, with the most famous line being "It's like a jungle sometimes, it makes me wonder how I keep from going under" (Grandmaster Flash - The Message, 1982). Songs like 'The Message' turned out to represent and inspire many other young people from the ghetto, who related to what was expressed in the music. This way, hip hop developed into one of the main creative forms of expression for the residents of these ghetto's, to talk about the socio-economic problems that they undergo in their lives (Rose, 2000). With its rather direct approach, rappers tell stories about their difficult lives, making societal problems concerning social inequalities visible for audiences outside that environment.

On the other hand, since the beginning of the genre, mainstream media have criticized hip hop artists for the influence their music allegedly has on society, claiming that it spreads the wrong message about violence, drug abuse and related moral issues. Former president of the United States Ronald Reagan supported this belief and during his presidency in the 1980s, he enforced an active approach against the social classes that were, in his perspective, the root of America's problems (Keyes, 2004). Because of Raegan's aggressive approach, rap music developed into the voice for its counter-message. Especially since the emergence of 'gangsta rap' in the late 1980s, this competition between hip hop and the government really caught the public's attention due to outspoken statements of hip hop artists and the harsh measurements by the government to ban the music genre. Hip hop groups like N.W.A and Geto Boys are examples of acts that caught much media attention due to their clashes with the government (Hochman, 1989; Potts, 2016). In addition to the already critical socioeconomic message of hip hop, this competition further fueled the rebellious spirit of the genre.

However, another side of hip hop culture, which seems contradictory to this rebellious tendency, are the materialistic values that are regularly reflected in rap music by some artists: designer fashion, expensive jewelry and cars are elements that are not unknown in the genre (Podoshen et al., 2014). The youth that comes from similar cultural areas as hip hop itself, perceives those rappers as heroes who climbed up the socio-economic ladder, which shaped the culture around the genre towards a materialistically driven tendency (Keyes, 2004). Signing a deal with a record label is thus a milestone for many aspiring rappers, representing the potential growth of economic wealth. Especially signing with one of the major record labels may be regarded as one of

the highest reachable milestones for building a professional career as a rapper, because of the majors' notorious role as the gatekeepers in the industry (Vito, 2019).

2.2. The music industry and its transformations

2.2.1. The traditional power structures

Up until the 1980s, the recorded music industry consisted of many different record labels (Hracs, 2012). The three current major record labels gathered their power since the 1980s through a consolidation strategy, with mergers and acquisitions of many smaller record labels (Hracs, 2012; Keyes, 2004). The amount of 'players' in the music industry was brought down because of this, and their capital and power was bundled. This way, the vertically-integrated outcomes of the consolidations controlled every aspect of the business, varying from music production to distribution, marketing and other specialized aspects (Hracs, 2012; Oliver, 2010). Just before the new millennium, the five remaining large, consolidated corporations - now called majors - were Bertelsmann AG, Seagram/Universal, EMI, Sony and Time-Warner. After some bankruptcies and more consolidations, Sony Music, Universal Music and Warner Music remained as the three major record labels in the music industry. These new power structures since the 1980s changed the landscape of music completely, and set a new standard for years to come (Bernardo & Martins, 2014; Hracs, 2012; Hviid et al., 2018; Vaccaro & Cohn, 2004; Young & Collins, 2010).

Traditionally, this consolidated power of majors was too strong for an artist to build a professional career without the help of a major record label. The required resources and skills to build a professional career asked too much of the average starting musician: the music industry was very complex and required entrepreneurial, legal, and technical skills to be able to get an artist's music to the masses. Music artists often lacked the resources and skills to develop their access to the industry themselves (Hracs, 2012). Basic music production, for example, firstly required a large amount of financial resources for equipment, to be able to record professionally-sounding music (Bernardo & Martins, 2014; Inglis, 2015). Professional production and engineering skills were thereafter needed to finalize the product. Especially in the 1980s and 1990s, it was therefore hard to even get hold of the required equipment, so possessing - or finding someone who possesses – the highly-technical production and engineering skills was even more rare (Bernardo & Martins, 2014; Guichardaz et al., 2019; Inglis, 2015). Only majors had the required resources and skills, which made these high entry barriers beneficial to their business model. This way, signing with a major label would provide access to these resources and skills, giving the music artist a competitive advantage.

After recording, the music had to be physically produced and distributed to retail stores. This is where the next problem came to the surface for small, independent artists. Besides needing high budgets to physically produce music on a large scale, distributing music on a national or even international scale was also difficult (Benner & Waldfogel, 2016). The majors were so power- and resourceful, they could exploit their competitive position to dominate the retail stores throughout an entire country or even the whole world. This way, independent music artists had little opportunities in distributing their music to the masses, limiting their distribution to the streets, niche stores and after-shows (Bernardo & Martins, 2014). Signing a major deal would generally mean that the music artist did not need to know or arrange all these business activities anymore; a major artist deal could now include production studios, sound engineering, management, legal services, distribution and promotion on a large scale (Hracs, 2012). This enabled the artist to entirely focus on and improve their creative process.

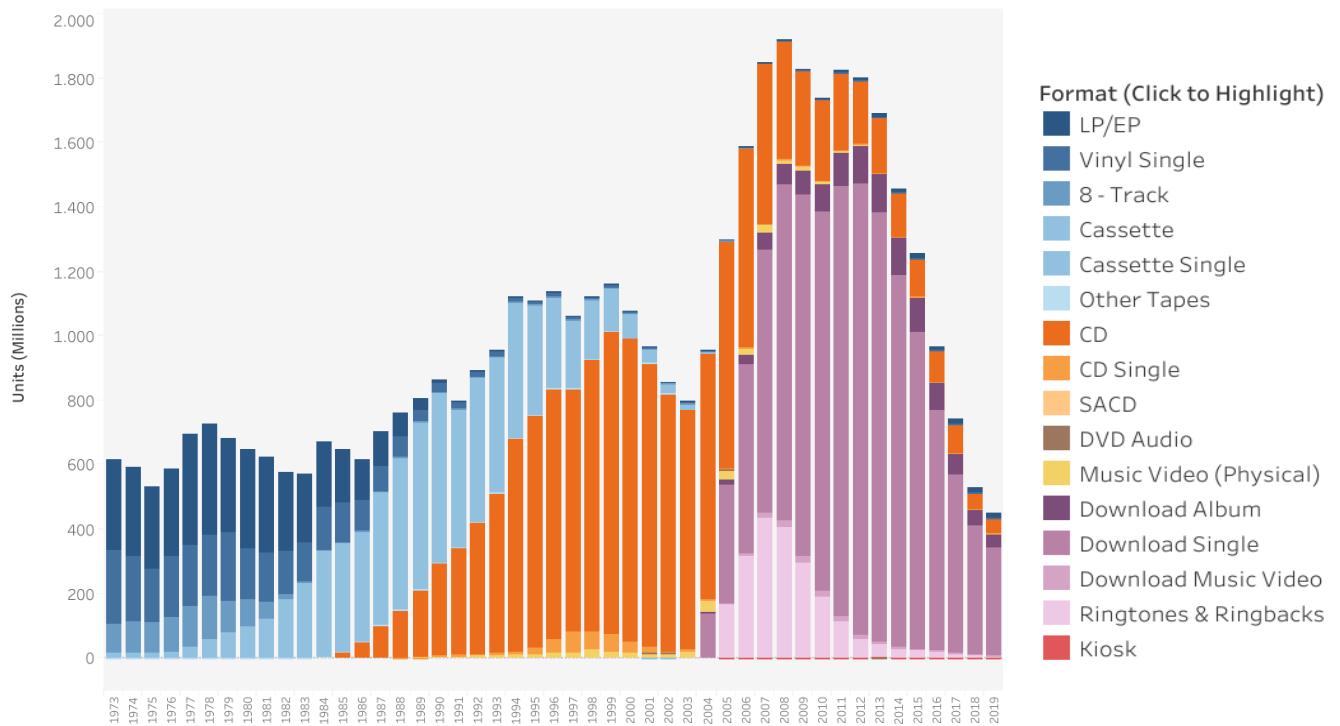
2.2.2. Technological developments

The aforementioned oligopolistic power structures seem to have been changed in the current music industry due to technological developments (Bernardo & Martins, 2014). Most technological innovations turned out to be beneficial for majors up until some point. For example, the emergence of sound carrier formats like vinyl, cassette and cd formed opportunities to create new markets (Hracs, 2012). With these new formats, majors could reduce their production costs and increase the consumer price, generating higher profits (McLeod, 2005). Back catalogues that lost their traction could additionally be marketed and sold again with the emergence of every new format (Leyshon, 2001). It is not unthinkable that majors welcomed these new technologies with open arms. However, the digital innovations that took place since the end of the 1990's turned out to be detrimental to their successful business model, which was based on the sales of physical carriers of recorded music. This arguably eliminated some of the majors' power and empowered smaller, independent labels and artists by lowering entry barriers for musicians (Bernardo & Martins, 2014; Hracs, 2012; Hviid et al., 2018; Vaccaro & Cohn, 2004). The most impactful digital innovations emerged from two sections of the music industry's supply chain: production and distribution.

The first development empowering independent artists relates to the production of music and the increase in access to the attributes and skills needed in the music industry (Bernardo & Martins, 2014; Guichardaz et al., 2019). Due to the fast development of digital sound technologies, the cost of musical instruments and recording equipment decreased rapidly. Less financial resources were needed to acquire instruments, but more importantly digital music production software appeared to make the process of learning to produce music a lot faster than before, thus lowering

the entry barriers for musicians (Guichardaz et al., 2019). Because of this, more independent artists and labels now have the opportunity to try and build a career in the music industry with professionally-produced music. For hip hop music, FL Studio – also called Fruity Loops – has been an impactful software program that inspired many people to make music professionally. While some other digital audio workstations (DAWs) already existed, FL Studio managed to become the genre's standard and helped to shape the sound of hip hop music into the next phase (Weiss, 2016). Before the program came to light in 1997, other DAWs were often only used by professionals (Levine, 2019). The innovation of Fruity Loops thus lay in the interface and usability: by keeping the interface simple while not losing high-quality features, amateur producers were now also able to use digital programs for professional music production (Fintoni, 2015). Because of the high illegal accessibility of FL Studio, many producers managed to download the program without needing any financial resources when a computer is already owned, evidently showing the effect of software like FL Studio on the entry barriers for musicians (Bouwhuis, 2017). Expensive production studios were no longer required to make marketable music, because a computer and a microphone is now all a hip hop artist needs.

The other, disruptive impact that innovation had on the industry, relates to the distribution of music. This effect underlies the purpose of this thesis, because it forced the majors to redefine their powerful and successful existing business model: selling music physically lost its relevance with the emergence of file sharing technology (Hracs, 2012; Hviid et al., 2018; Vaccaro & Cohn, 2004). Mp3 is a software technology that utilizes much less space for digital music to be stored than all earlier formats, but its most impactful feature is that mp3 files can be downloaded to and played from a simple computer. So when this technology became widely available, consumers started to exchange music with each other freely – and arguably illegally – through websites like Napster, which was the first well-known platform that facilitated revolutionary file sharing between consumers. According to Leyshon (2003), Napster became widely popular in the year 2000, when half a million users were active on the website at any given time. A year later, Napster already reached 60 million users in total, without even having promoted the website. To illustrate this new technology's effect on the music industry, one of the majors of the time – Seagram/Universal – lost 9 billion dollars in the first three quarters of 2002, instead of steadily growing like before the crisis (Hracs, 2012). The following two graphs of the RIAA, which is the official representative of the American recorded music industry, show the emergence and effect of file sharing technology.

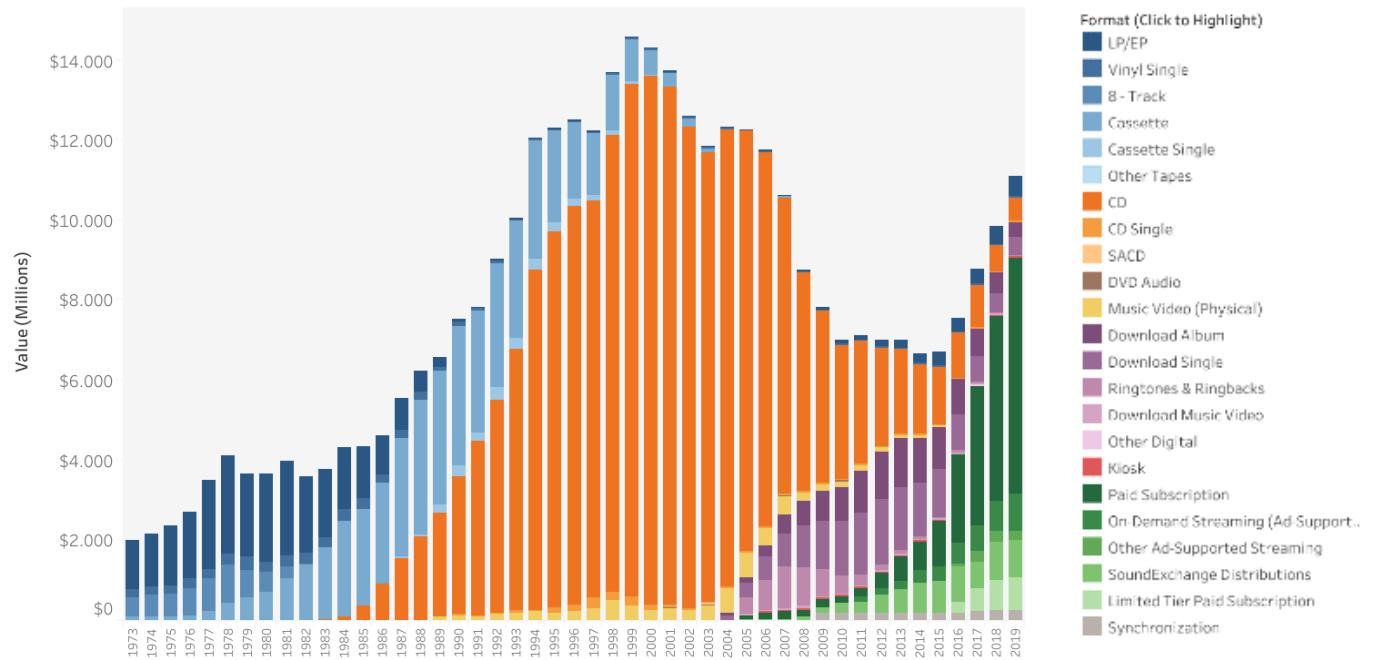


Graph & legend 2.1: US Recorded music sales in volumes, 1973-2019

Source: RIAA (2020)

As seen in graph 2.1 above, the amount of cd sales started to decline in 1999 for the first time since its popularity. It is not until 2004, however, that downloaded music began to take a significant share of the total music industry pie: 14.5%. Only 5 years later, in 2009, almost 83% of all consumed music was purchased and downloaded online. This growing trend carried on until 2012, when a great decline followed with the advent of subscription-based consumption and streaming. Graph 2.2 below shows the financial effect of these changes on the revenues made in the music industry, with subscription based consumption also added as a format. CD's sales crashed from collecting 12.8 billion dollar in 1999, to 4.3 billion dollar in 2009, and the graph suggests that the emergence of illegally downloaded music had an influence on the CD's decline. However, Vaccaro and Cohn (2004) and Hracs (2012) also state that another reason for the CD's decline, besides the emergence of new formats. Many young consumers also seemed to undergo a shift of interest, from music to other entertainment products like games and DVD's. These two developments initiated a massive decline in total revenues from recorded music, as seen in the graph below. According to Hracs (2012), majors did respond to the changes in the industry, but their reaction was not quick enough. He suggests that this could have been the results of their large, centralized organizational structures, lacking the flexibility to quickly respond to their changing environment. Not adapting adequately resulted in the lowest revenues made in the industry since 1989. Both graphs ironically

indicate that during this time of financial crisis in the music industry, there was more music consumed than ever before.



Graph & legend 2.2: US Recorded music sales in revenue, 1973-2019

Source: RIAA (2020)

During the times when illegal downloading was most popular, majors responded with legal action at first (Hracs, 2012; Vaccaro & Cohn, 2004). The courtroom was used to try and minimize the consumption of shared music, which resulted in the shutdown of some leading file sharing websites – like Napster. However, illegal downloading remained immensely popular until the emergence of another new technology: paid subscriptions and streaming (Hracs, 2012; Vaccaro & Cohn, 2004). This was regarded as the solution to illegal downloading. As seen in graph 2.2, the decline of revenue stagnates as of 2010, when streaming services began to obtain a significant share of industry revenues. Subscription and streaming consumption grew rapidly in the following years, up to an 80% share in 2019; the industry's total revenues grows in tandem. This development in the consumption of music has forced a change in existing business models in the industry for recorded music completely, from focusing on acquiring recorded music to providing access to music.

Digitalization has thus impacted the music industry in different ways, not only for production and distribution, but also for the marketing of music. Musicians can now use the internet for its communicative purposes to market their music and brand (Bernardo & Martins, 2014). The communicative possibilities of the internet enable music artists to increase consumer engagement,

with rather direct and short lines of communication through social media, which is observed as an effective form of marketing in today's day and age (Chu & Kim, 2011; Hollebeek et al., 2014). Since the digitalization of the industry, many artists have been using the internet and social media to promote music and connect with fans.

With all these aforementioned changes, it is clear that supposedly every individual is able to produce, distribute and promote music without requiring many resources or help of large record labels, reflecting the lowered entry barriers for musicians in the digital age. Unlike before, supply and demand can now reach each other without requiring the mediating role of a (major) record label (Guichardaz et al., 2019). All these developments fueled the research field to examine the current and future power structures of the age of digital music.

2.2.3. Disintermediation

For decades, major record labels have thus been the most powerful intermediaries in the music industry (Hracs, 2012; Keyes, 2004) . An intermediary can be explained as a party between a producer and consumer, that ultimately adds value to the end product (Bernardo & Martins, 2014). So not only labels are intermediaries in this industry, but also parties like distributors, booking agencies and streaming services. From this definition, disintermediation in the music industry would mean that the existing intermediaries are not able to add value anymore in the supply chain of music production, in any way that is perceived as valuable to musicians, which results in the removal of the intermediaries and reduction of the amount of parties between the producer and consumer. The musician would internalize the practices that were performed by the intermediary before, and thereby arguably obtain higher profit margins and more power over the end product, while the consumer has an increased range of music to choose from and lower prices as a result (Benjamin & Wigand, 1995; Bernardo & Martins, 2014). Many researchers believe that this is the case in todays digitalized music industry and therefore state that the market for independent music has shifted from a niche to the mainstream market, which seems true according to an article in Forbes (Bernardo & Martins, 2014; Hracs, 2012). The market for independent music is growing exponentially, showing a growth of 35% in 2019 compared to 2018 (Daniels, 2019).

According to Bernardo and Martins (2014), digital media created a new industry where online platforms – like Spotify, YouTube, Instagram and independent online distributor or aggregator TuneCore – serve as an alternative to the practices that were left to traditional industry professionals before, such as record labels, distributors, promoters and radio stations. These new methods seem to have provided artists the control to follow an autonomous and independent approach in building a career in the music industry. Other researchers also seem to agree with this perspective. Valladares

(2011), for example, supports this theory and adds that production, promotion and distribution are the key fields most affected by media innovation.

These digital platforms are not only available, but many music artists are also very aware of how to take advantage of the opportunities in the current industry to build on a career while only using basic, accessible technology (Bernardo & Martins, 2014; Hracs, 2012; Young & Collins, 2010). An example of this awareness is seen with platinum-selling rapper Soulja Boy. As a 15 year-old kid, he acknowledged the power of the internet and started to promote his music through Myspace and other social networking platforms, even before using the internet as a marketing tool was common among musicians (Philips, 2019). He managed to build on his career with his own independent label in the following years and became a rap sensation. Even though he achieved his early success fully independent and is now credited as the representative for independent internet marketing in hip hop culture, he did not reach mainstream level until he signed a major deal with Universal (Philips, 2019; Concepcion, 2008). Was he able to become a mainstream rapper without the help of a major? Either way, this awareness and relating perception of hip hop artists does influence the actual role of labels and other intermediaries. An industry-wide perception shift in the evaluation on these roles could mean that intermediaries must adapt to be able to still be seen as valuable to these artists. For example, while hip hop artists in the 1980s and 1990s generally wished for labels to arrange their production and distribution, could musicians now believe that a label is not required to fulfill these tasks (Hracs, 2012). This represents the devaluation of the relevance of labels and other intermediaries in the digital age. Such a perception shift can arguably be seen in the current fast-paced growth of the independent's share in the music industry (Daniels, 2019; Ingham, 2020).

2.2.4. DIY ethos

The power of majors has always been challenged by independent record labels. Eventually, the distinct music that came from independent minds developed into a popular music genre, which originated from the Great-Britain in the 1980s (Hesmondhalgh, 1999). According to Hesmondhalgh, British alternative rock musicians began to adopt the term 'indie rock' in order to set themselves apart from the mainstream pop rock music that was popular in their country at the time. Music that derived from the indie rock scene was seen as more relevant and authentic by young consumers, possessing more cultural value than popular music. Artists would do not be allowed to do concessions at the expense of creativity to reach commercial success, which means that they could have full artistic autonomy and still be respected and consumed by listeners in that indie scene. By the time of the 1990s, British indie rock/punk artists managed to get their country to accept indie rock/punk music into pop culture.

This rise of independents is thereby strongly intertwined with the emergence of DIY in the 1970's punk movement, which developed DIY elements such as empowerment, autonomy and freedom in making music, but also more broadly in promoting and distributing it afterwards (Den Drijver & Hitters, 2017; Guerra & Costa, 2016). These ethics can also be linked to anarchistic beliefs, where democratization and decentralization are important underlying motives (Bernardo & Martins, 2014). A DIY artist is thereby typically characterized by the opposition to mainstream music and practices, artistic integrity, aesthetic quality and intrinsic motives instead of monetary motives (Bernardo & Martins, 2014; Den Drijver & Hitters, 2017). It is therefore important to distinguish between a DIY and an independent artist. The only criteria with identifying an independent music artist is determining the presence of contractual ties with any of the major labels. The independent artist still has the room to sign deals with large, resourceful independent record labels, or distributors with label services like EMPIRE or AWAL, who can support the artists in the field of music production and promotion next to taking care of distribution. A DIY artist, however, can be regarded as a niche within independent music scenes, taking being independent even a step further and not accepting any interference of other parties concerning other than the absolute necessary. An agreement with a label will provide the artist financial, technical and business resources, but artists have to turn in some of their creative autonomy at the same time (Hracs, 2012). An independent artist will still have to navigate within the parameters that their label outlines, concerning music production, marketing and distribution. This is where the DIY artists sets himself apart from others, because they always strive to keep every decision in-house.

These ethics are also observable in underground hip hop in the decennia following the 1970s. While signing with a large record label was seen as a sign of success in the mainstream hip hop music industry, underground hip hop developed a tendency against record labels and their practice (Vito, 2019)s. For example, this is expressed with a famous line in the song 'Check the Rhime' by the commercially successful, anti-major hip hop group A Tribe Called Quest: "Industry rule number four thousand and eighty, record company people are shady" (A Tribe Called Quest – Check the Rhime, 1991). The group elaborates on this statement on the song 'Show Business' on the same album, explaining why an artist should not participate in the dark practices of the music industry, implicitly translating into a strong preference for a DIY approach in building a career in the music industry. To date, the ethic of DIY still resonates heavily in the independent music sector. Many known hip hop artists, such as Frank Ocean and Chance the Rapper, aim to keep control about the whole supply chain as much as possible and are prepared to miss mainstream acclaim because of this (Mama, 2019; Rys, 2016). A couple other of many hip hop artists who (have) successfully follow(ed) this approach, are Tech N9ne, Joey Bada\$\$ and MF Doom.

But why could DIY ethos be present in hip hop? The relation between hip hop and DIY ethos seems worthwhile to study, as hip hop fuses a fascination for wealth and success with an ethic of resistance and anti-establishment. To a certain extent, there firstly seems to be some overlap in the identity of both terms. As explained before, hip hop possesses a rebellious spirit, seen as a medium for underprivileged youth to express political critiques about their socioeconomic disadvantage (Bennett, 2018; Vito, 2019). According to Bennett (2018) and other scholars, being a DIY artist often includes the urge to express political messages in their music (Den Drijver & Hitters, 2017; Vito, 2019). This political stance is traditionally rebellious compared to mainstream perspectives, resembling certain messages in underground hip hop music. Secondly, the growing importance of live performances created a new, more feasible revenue model for DIY artists. While the consumption of recorded music became less lucrative since the crisis in the music industry, cities increased the value perception of live performances through new cultural policies (Bennett, 2018). This development thus additionally enabled DIY hip hop artists to build on and survive a career in music, attracting listeners through platforms like Soundcloud and profiting mostly from live performances.

Another reason that caused the DIY ethos in hip hop culture to grow, is obviously the emergence of the internet and its possibilities. With the DIY ethos already being similar to an extent with hip hop culture, the internet created more opportunities for a DIY approach in music careers, enabling DIY hip hop music to grow as a whole (Bennett, 2018). As explained before, FL Studio helped to empower amateur hip hop artists to be able to produce music. Other digital technologies, regarding distribution, are also regarded as being strongly influential in the empowerment of DIY artists in hip hop, of which Soundcloud has been one of the most prominent. Soundcloud is an online platform that enables musicians to release their music without requiring any resources. Hip hop caught on since 2015 and, as explained in an article of GQ, 'Soundcloud rap' eventually became a distinctive DIY subgenre of hip hop music a couple years ago, birthing mainstream rap stars like Juice WRLD, XXXtentacion, Lil Pump and Lil Peep (Battan, 2019). Many of the songs labeled as Soundcloud rap even sounded like unmixed, demo songs. Music artists however earn no profits with the consumption of their music on Soundcloud. While DIY Soundcloud rap had become its own subgenre, majors noticed its sudden popularity and tried to sign upcoming Soundcloud rappers early on in their career, making the genre a more lucrative business, and many of them did (Battan, 2019). This interference of majors can be seen as a way to reallocate some of the new, independent power in the hip hop music industry back to the major record labels. After the death of many young Soundcloud rap stars – including all aforementioned Soundcloud rappers except Lil Pump – the genre

lost its popularity. NY Times declared the end of the Soundcloud era in hip hop in an article published in December 2019 (Caramanica, 2019).

While since the digital age there were always certain online platforms popular for independent hip hop scenes – from downloading independent mixtapes on Datpiff.com to the more recent Soundcloud – it seems like DIY hip hop artists do not have their ‘own place’ anymore. While YouTube does support independent music, its presence is less concentrated than on platforms like Soundcloud due to the strong presence of mainstream music artists, while Soundcloud is more popular for and focused on bottom-up, independent music (Hesmondhalgh et al., 2019). The current lack of such a popular, distinct platform for independent hip hop music could mean that DIY hip hop music loses its cultural distinctiveness, blending into the rest of the music industry. This seemingly relates to the recent developments on Spotify, which allow DIY artists to distribute their music much more easily than before, which results in the same, if not more competitive environment as is the case with YouTube. The latter relates to the concept of reintermediation, which will be discussed in the next section.

2.2.5. The counter-message: (re)intermediation

The concept of disintermediation is contested among music industry researchers. Some scholars argue that technological innovations caused the process of disintermediation to be followed by reintermediation, while others argue intermediation by new parties in the music industry (Galuszka, 2015; Guichardaz et al., 2019; Hviid et al., 2018). Because of the deeply rooted successful business models of the major record labels, a quick adaption as a reaction to the changing industry was not realistic. After an initial period of decline, recently, scholars such as Guichardaz, Bach and Penin (2019) argue that the majors have found their way to react to the new digital age and regained their initial dominant position in the supply chain of music production. This is called reintermediation.

Even though the strength of their dominance decreased after the disruptive innovations around the new millennium, different statistics in their article show there is growth in the majors’ total market share of the last years, implying that the majors have indeed effectively adjusted their business model to the current industry. According to Guichardaz et al. (2019), majors implemented new strategies by which they could reestablish their central position. Such strategies include ‘360 deals’: agreements with artists where the major label secures different sources of revenue streams of an artist: be it from music sales, live performances, advertisement, merchandise, and more (Guichardaz et al., 2019; Marshall, 2013). This way, the function of majors seem to have changed from being a record label to more broadly a ‘music-business’ company. The majors’ power has

become more centered around their transactional capabilities. Their longstanding music catalogue and experience in the industry is used as a bargaining tool for all different kinds of transactions, which is a competitive position that an independent artist could never achieve by himself. Promoting music through traditional media companies, like radio stations, is an example of an agreement that is made possible due to trust, built on years of successful precursors. The same applies to their strong bargaining position with companies like Spotify and Apple Music, with whom they can make favorable deals due to their large catalogue (Galuszka, 2015; Guichardaz et al., 2019). Their strong position can thus be explained by favorable economies of scope and economies of scale with all sorts of business deals. This way, the relatively new trend in the majors' strategy secured new income streams that strengthened their role in the music industry. This strong competitive position compared to independent labels can also be seen with the possibilities concerning online marketing. While low-cost promotion through social media is possible, subsequently the competition between independent artists is also incredibly high (Hracs, 2012). Therefore, online marketing by a major will likely be much more effective due to their vast financial and networking resources. Because of all aforementioned reasons, Guichardaz et al. (2019) argue that the entry barriers in the music industries have not lowered, but only altered.

Another possible outcome of the digital revolution is the intermediation of new parties (Galuszka, 2015; Hviid et al., 2018). Digital innovations have expanded the possibilities, which seems to have increased the amount of parties involved in the music industry. Free music services on the internet have made the access to digital distribution of music on platforms like Soundcloud easier for DIY and independent artists. However, getting music on digital music stores like Spotify or Apple Music is more difficult, while these are the most used services for music consumption nowadays (Watson, 2020). An individual artist or independent label will have a weaker bargaining position against digital music stores because of the high transaction costs and asymmetrical information (Guichardaz et al., 2019; Hviid et al., 2018). This means that smaller parties may lack the resources or knowledge to make favorable deals with powerful companies like Spotify. This is where music aggregators come into play. Music aggregators are organizations that bundle the rights to music of multiple artists and distribute to digital music stores; economics explain the presence of music aggregators in the industry (Galuszka, 2015). By specializing in the field and bundling a large catalogue of music, the bargaining power against music stores is strengthened, which makes those deals through music aggregators more profitable for musicians. Examples of the most popular music aggregators are TuneCore, Distrokid, CD Baby and Bandcamp (Littleton, 2019). Some scholars thus perceive music aggregators as new intermediaries in the music industry. It is however unclear what the outcome of such reintermediation processes will be. Hitherto only very little research has been

done on the ways in which music artists are able to bring their products to the market in these new circumstances.

Since the DIY possibilities on the internet are clear to most musicians, many choose to not hand over master recordings and high percentages to record labels (Mama, 2019). Relatively new independent companies like AWAL anticipate on this new tendency by offering alternative deals to music artists. While traditional record labels are known for limiting the artist's creative control and taking high percentages of revenues, like with the 360 deals, these new companies market themselves as distributors and record labels. They mainly provide online distribution services to most of their artists, but also other supporting services concerning production and marketing for bigger artists. The difference with traditional record labels is that they do not obtain master recordings, tend to leave as much creative control at the artist as possible, and take a much smaller portion of revenues (How it works, 2020). This way, the artist is left with the stronger position, compared to the traditional label-artist relationships where the record labels 'owns' the artist (Jones, 2018). Logically, many artists prefer this new path where less power is handed over. Examples of successful, charting hip hop artists currently signed with AWAL are Little Simz and Yung Lean (Petras, n.d.).

Altogether it is clear that the traditional power structures of the music industry have been challenged by some impactful innovations and developments. What the current and future state of the music industry is, is a question that the research field has yet to agree on. In each case, the analysis of existing literature strongly suggests that traditional record labels have lost their power to some extent due to digitalization of the industry. DIY hip hop also seems to exist, with a strengthened position in the industry in these new circumstances.

3. Methods

To find how DIY ethics can shape the role of intermediaries in local hip hop production, qualitative research methodology was used. Qualitative research is helpful in finding the experiences of hip hop artists and insights from experts in the hip hop music industry by processing underlying meanings and insights as valuable data and using inductive thinking to come to new findings (Boeije, 2012). Inductive thinking enables to examine social phenomena to find patterns that can ultimately create new theory. Qualitative research methodology therefore helped this thesis to explore the experiences of interviewees when it comes to the DIY ethos and the role of intermediaries, in order to find patterns that reveal social tendencies and meaningful insights on the current state of the music industry and its artists. More concretely, the method mainly helped to reveal how hip hop artists perceive the possible presence of DIY values in themselves, and how they perceive the power structures of the music industry in relation to that, supported by perceptual insights from industry experts. This chapter argues the choice of research methodology and explains how the research was performed, including clarifications on data collection, operationalization, and data analysis.

3.2. Semi-structured interviews with artists and experts

The data collection is based on nine semi-structured interviews, whereof five with hip hop artists and four with industry experts. Initially, a skewer ratio towards artist interviews was strived for, but the emergence of COVID-19 limited the opportunities to realize the target. The focus on artist interviews is because the field of research already centers on perspectives from the industry, but this research examined a bottom-up perspective by focusing on perspectives of (DIY) artists. Semi-structured interviews were used to reveal values and perspectives by providing a topic list and a set of questions, but also leaving adequate space for the interviewees to give rich narratives on their experiences with and perspectives on a DIY approach, being independent and signing with (major) record labels or other intermediaries. This style of interviewing thus enabled to obtain descriptions of the interviewee's life, while taking the impact of personal interpretation into account (Boeije, 2012; Kvale, 2007).

The interviews with hip hop artists include not only rappers from the Netherlands, but also a rapper from Greece and a producer from the Netherlands. Because rappers and producers are both creatively involved in producing the end products and therefore also potentially involved with intermediaries, it was presumed that they have at least already thought about staying independent or signing a deal with a (major) record label or other parties. All musicians in the process of hip hop production are thus regarded as hip hop artists for this thesis. Also, there is no sample criteria on the

popularity or reach of an artist. Obtaining interviews with different class artists has provided different perspectives, creating a more holistic view on artists in the current music industry as a whole. Getting interviews with the most famous artists was not feasible, but there are some significant differences in popularity and reach between the interviewed artists. For example, some interviews were performed with small, local hip hop artists, but another was performed with a popular Greek rapper that is signed to a large independent hip hop label in Greece. Some interviewees also had experiences with major record deals, which together added valuable insights when comparing the different perspectives with each other. An industry expert, on the other hand, can be every party that is active in the hip hop music industry and has experienced the existing power structures of the industry without being a professional music artist. The interviews with industry experts therefore consisted of interviews with an independent label owner, a senior A&R at a large Dutch sublabel, an artist manager, and an artist manager/bookings agent. According to Bogner, Littig and Menz (2009), expert interviews are an efficient way to gather relevant data, especially because the business side of the music industry appears to be an isolated field that lacks transparency towards the public (Guez, 2015). The positions of industry experts therefore provide certain knowledge on the hip hop industry that is less obtainable from the outside looking in. The music industry constantly changes due to the fast pace of technological developments, so the interviewed experts were also presumed to potentially have relevant topical knowledge on or experiences with the industry that the research field does not yet look into. Interviewing industry experts from different tiers that are related to majors and independent companies helped to understand the different roles of intermediaries and provided a holistic view on the hip hop music industry. See Appendix A for a list of all participants, including their names, ages, professions, and experiences with intermediaries (if applicable). The stated pseudonyms are used for two of the experts to protect their identity for the public.

Different sampling methods were used to efficiently find a relevant set of respondents, but participants were mainly found through purposeful sampling. This sampling method was useful because the research specifically required participants that could express DIY values, otherwise the research would not give me insights on how DIY hip hop artists – if existent – act in the current industry (Boeije, 2012). Supported by my knowledge of the Dutch hip hop industry, I selectively searched for hip hop artists that are independent or seem to have DIY ethos based on information I could find on the internet. For example, I researched the careers of artists to find if they are (or have been) signed to a record label by reading the credits of their released music on Spotify. Keeping in mind the purpose of this research, artists and professionals of different tiers were contacted through social media and e-mail. No initial connection was required for most of the interviewees to

successfully make contact. In addition, personal networks were used to find entrances to relevant parties that were willing to participate, which eventually added two interviews to the research. Because of the isolated and network-driven essence of this industry, snowball sampling was used afterwards to find the last valuable participant.

Initially, all interviews were preferably going to be performed face-to-face to capture the non-verbal communication as well, which can provide additional information about the interviewee's experience (Kvale, 2007). Unfortunately, most of the planned interviews - apart from three early interviews - could not be performed face-to-face anymore because of the COVID-19 outbreak and its measures for society. Online video calling software Skype and Zoom were therefore used to minimize the limitations of the interview approach. According to Janghorban, Roudsari and Taghipour (2014), current technology enabled the quality of online video calling software to be just as high as a face-to-face interview. Verbal and non-verbal cues can still be noticed by the interviewer. The three face-to-face interviews took place in the homes of the concerning participants, so that the setting was fitting for longer, in-depth interviews.

3.3. Operationalization

It was important to start with making a topic list with questions based on the literature study to ensure that all relevant concepts and fields are covered. Answering the research question "*Are DIY ethics present in local hip hop production and in what way does this shape the role of intermediaries?*" would consist of different elements: DIY ethos, digitalization and intermediaries. Two initial topic lists were developed based on these elements and had some minor improvements as the amount of performed interviews increased. An evident difference in topic lists derives from the difference in required approaches for the artist interviews and the expert interviews. The artist interviews focus on the artist's perception on their career, opportunities and threats, while the expert interviews were intended to go in-depth on the relevance of their profession and the power structures of the industry. Searching for DIY values would not be relevant for the expert interviews, so that topic is excluded from the topic list for expert interviews. Both complete topic lists with questions can be found in Appendix B.

The first topic is 'Introduction' and was required to be able to create a factual profile of each interviewee. The second topic, 'Motivations & DIY', involved around trying to find if DIY values were present in the interviewed artists. The questions in this topic were not included in the expert interviews, because it mainly tried to reveal if DIY ethics were present with the interviewed artists. Based on theory on the DIY ethos, specific questions were included that reveal the motivations, values and goals of artists. For example, according to Den Drijver and Hitters (2017), artistic integrity,

aesthetic quality and intrinsic motives are important indicators for identifying DIY values. Close attention was therefore paid during the interviews to questions about motivations, values, and goals. The third topic is 'Digitalization' and was intended to examine the participant's awareness of the impact of digitalization on their own profession and career. Although some of the questions may seem quite rhetorical because the research field has examined this issue extensively, the goal was to find what the most important aspects of digitalization are in the eyes of the interviewee and potentially add specific insights on the effect of technological developments on artists or intermediaries. 'Intermediaries' is the fourth and last topic, and was included to make sure that the interviewees were asked specific questions that revealed their perception on the power structures of the industry. The focus was on finding the interviewee's valuation of intermediaries by including questions about the necessity of intermediaries. Because major record labels are traditionally the most dominant intermediary, most questions revolve around labels.

3.4. Thematic content analysis

With the help of transcription software AmberScript, audio recordings of all interviews were converted to text to be able to analyze the rich, descriptive data critically and structurally. The transcripts are kept in its original language and is not grammatically corrected to secure the value of the original choices of words and expressions for understanding implicit meanings (Kvale, 2007). Hence, it includes every slang word, slips of the tongue, uh's and hm's. Only the Dutch quotes, that are used in the following chapters, are strictly translated to English to improve the presentation of results. During the interviews and the transcribing of recordings, the focus was already on searching for patterns. Every relevant insight that came to mind was added to my notes to not lose progress and to improve the efficiency. After transcribing the interviews, theory on thematic content analysis was used as explained by scholars such as Boeije (2012) and Herzog, Handke and Hitters (2019). A thematic analysis suits well with the explanatory essence of this research and helps to dissect the answers of interviewees to reveal personal experiences and perceptions in a deductive manner. Based on theory by these scholars, the procedure of analysis consisted of three main steps: open coding, axial coding and selective coding.

All steps of analysis are performed through ATLAS.ti, a software program that enables data analysis in a structured manner. The tool is used for this research to make and organize codes, so that a clear overview of all codes facilitates all steps of the analysis. In the process of 'open coding', the first step, the transcripts are firstly read thoroughly to make sure that I know all the data. This is an essential part of the thematic content analysis (Herzog et al., 2019). Initial descriptive labels (codes) are also assigned to cohesive segments of the transcript in this phase, which fragmented the

whole interview in meaningful clusters (Boeije, 2012). Hereby, attention was already paid to similarities in the created codes, which led to the clustering of similar codes and fragments and removal of others. To enhance the overview of all 249 codes, colors were assigned to each code to classify them in general categories, such as 'Labels', 'Managers', 'Motivations', and 'Spotify'. The categories helped to organize the codes by naming the general topic of each code. However, some codes fitted multiple categories. ATLAS.ti fortunately enables to assign a code to multiple categories, so I could keep an open mind when analyzing codes out of categories and not think one-sided. The next step, 'axial coding', included a deeper analysis of the found codes. This phase was executed by reviewing all codes and trying to find links between codes using the overview in ATLAS.ti. Critical and pro-active interpretation of the codes resulted in the creation of subthemes, which enhanced the quality and reduces the amount of initial codes (Boeije, 2012; Herzog et al., 2019). Close attention was paid to ensuring that the data within the themes relate to each other meaningfully, while the distinction between themes is still clear (Herzog et al., 2019). I also started to determine which codes are more important than others. This way, I could already make a document of codes that could become main themes or subthemes. The last step of the thematic content analysis is 'selective coding'. This process involved the review of found themes and led to the refining or renaming of themes (Boeije, 2012). The main themes were extracted in this last phase, by determining the most important themes that together give a complete answer on the research question. Figures 1, 2 and 3 below illustrate the found main themes and the relating subthemes.

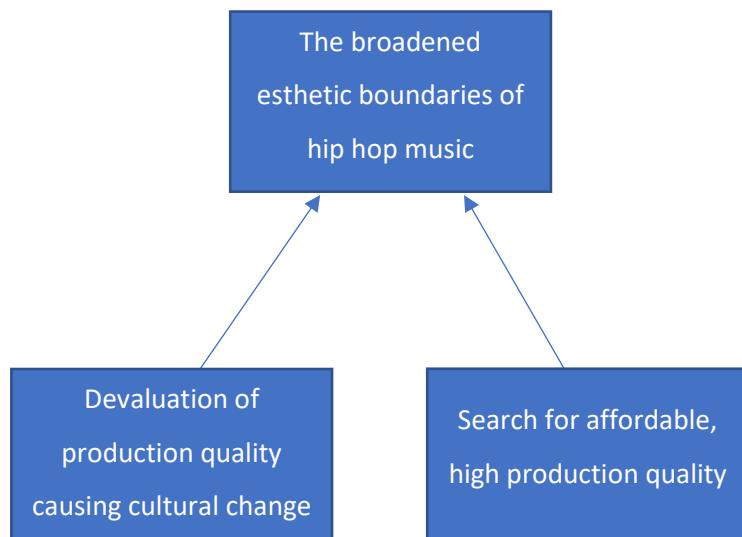


Figure 1

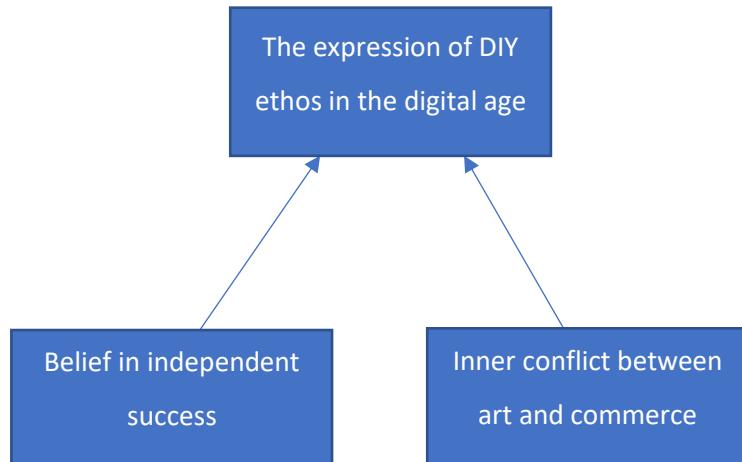


Figure 2

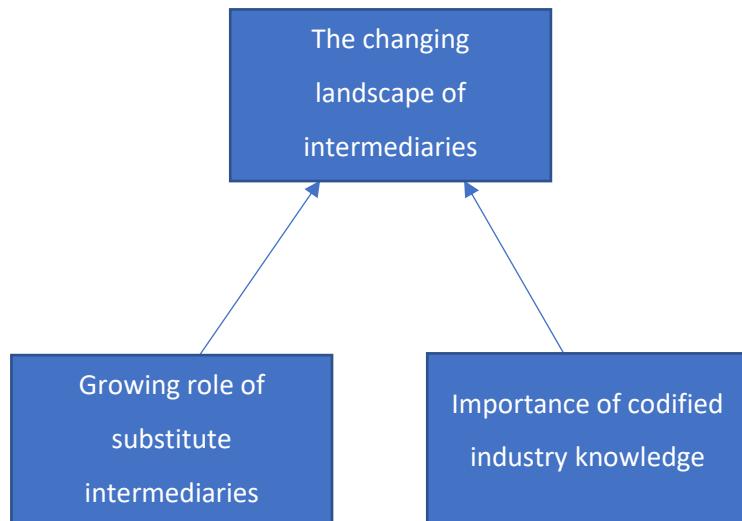


Figure 3

3.5. Reliability and validity

Close attention has been paid to consistency of measurements during data analysis to ensure the reliability of the research. This is strived for by strictly following step-by-step guides out of literature on research methodology such as literature of Boeije (2012) and Herzog, Handke and Hitters (2019). How the research is performed is explained extensively in this chapter, so other scholars can follow the same steps and perform the research in the exact same way to test the reliability (Boeije, 2012; Kvale, 2007). The same applies for ensuring validity. A research is valid when the research examines what really needs to be examined (Kvale, 2007). By explicitly and extensively describing the methodology of the research in this chapter, full insight is given into the establishment of measurements. This provides openness for others to verify the used measurements for validity

(Boeije, 2012). Hip hop artists and experts from different tiers and professions are included in the data collection, which supports the external validity of the research (Kvale, 2007). The openness of semi-structured interviews supports the internal validity, because I was able to adapt during the interview and ask the questions that were relevant to the research.

All interview questions are only related to the profession and career of the interviewees, which does not cause major ethical issues due to this research: all interviews are performed with fully informed consent. At the request of two of the interviewees, pseudonyms are used to protect their identity for the public. Only the used quotes are answers of the participants made public, the rest of the interviews will not be publicized in text or audio.

4. Results

The fourth chapter of this thesis lays out the main findings that surfaced after analyzing the interviews performed for this research. Nine interviews were performed with hip hop artists and industry experts to find insightful perceptions and information to analyze the current and coming field of DIY hip hop music and its intermediaries. To find results, a thematic content analysis was performed on the transcripts of the interviews, which resulted in the following three main themes: *the broadened esthetic boundaries of hip hop music, the expressions of DIY ethos in the digital age, and the changing landscape of intermediaries*. These main themes will now be further elaborated on based on their subthemes.

4.1. The broadened esthetic boundaries of hip hop music

It is useful to start presenting the results by explaining the new context of DIY hip hop artists. Certain developments in recent years have caused the music industry to open up, which had a significant impact on the esthetics of the genre and on hip hop culture as a whole. Based on the interview data, this created many possibilities for current DIY hip hop artists.

4.1.1. Devaluation of production quality causing cultural change

The first subtheme focuses on the new environment of a hip hop artist's playing field in the music business and what this means for current hip hop artists. Before the digitalization of the industry, the hip hop music available for consumers was controlled. The major record labels and their ties were so dominant in the industry that they acted as gatekeepers for the supply of available music (Vito, 2019). The public had to choose their favorite music from within the musical boundaries that the record labels thought would work and so were setting. Hip hop music therefore also existed within these esthetic boundaries, because other music would simply not be picked up by the majors and put in the market on a mainstream scale. These boundaries left little room for DIY artists who refused to hand over (a part of) their creative control to a large record label. As explained in the theory section, it was difficult to become a professional music artist without substantial financial resources, which allowed record labels to pick and choose and thereby control the market with resourcefully produced and marketed music (Hracs, 2012). For DIY artists to compete with label artists was thus not realistic. However, over the last decade this has changed. The public now has more power in choosing which music to consume due to the emergence of streaming platforms which opened up the previously closed supply of music. As a result, the current hip hop culture

seems to have broadened, according to the interviewees. This development is explained by an industry expert in one of the interviews:

And beats that also just dusty and, and just that you think 'has this person turned on a beat machine for the first time, or is this program turned on for the first time?' But it is just good, so yes, the standard has also changed. Although I don't like to talk about standards, but yes, kind of um, a bit gritty or, or over- or underproduced, that is also possible now and people like to listen to that. (...) just the energy and stuff and other, other things that are important. And I think that a lot of the, kind of new developments are also within hip hop, which makes you kind of interesting with relatively little. It does not have to be fully produced. (Daniel, expert)

This means that the technological developments in the production of hip hop music did not only lower the entry barriers for more artists to enter the market, but this also affected the way consumers perceive the music as a result. According to the expert, hip hop music productions do not have to be 'clean' anymore for consumers to be accepted, because the consumer's focus has shifted from valuing clean productions to valuing other elements like the energy within the music with an increased weighting. The reason for this is seemingly, as suggested by the participants, that DIY artists were finally able to become visible to a wider audience, facilitated by cheaper production technology and internet-enabled digital distribution. Now that DIY artists were able to distribute their music to anyone who wanted to, the aforementioned esthetic boundaries of hip hop music were widened significantly, causing a cultural change. Hip hop music fans broadened their 'taste' in music to the point where DIY artists can produce marketable music and build a professional career with only cheap production technology and the internet for digital distribution.

This effect on the hip hop listener's changed taste is demonstrated by the popularity of Soundcloud rap as an example. While the music is not produced according to the professional standards that applied earlier in the hip hop market, many artists succeeded to attract global attention and millions of streams with amateur productions (Battan, 2019). It seems like the lowered entry barriers therefore do not only apply to the technical and financial side of hip hop music production – which represents the lesser skills and resources needed to make a product for the market – but also the cultural side of music production. In other words, not only are less skills and resources required to produce a marketable product, what is perceived as a marketable product by consumers has also changed. According to the interview data, consumers now culturally accept a broader scale of products – or musical esthetics – which enabled different niche markets within hip

hop to emerge. This cultural change creates possibilities for more DIY hip hop artists with less resources or skills to pursue a professional career. Production quality standards are set lower and the label's resources are thus less required for recording and production. Because of this, the empowerment of DIY artists has come to the expense of the power of the established record labels. While the label's value for artists was always partly explained by their large access to resources, allowing for professional production and distribution, DIY artists do not need record labels anymore to produce a market-worthy product, according to the participants. Some artists showed awareness of this cultural change in the interviews. One of the interviewed artists said the following about this:

[The management team,] they have a very good studio. I could just go there, but in the end bro, it really doesn't matter if you record it in your bedroom or in the studio. You can hear the difference in quality if you have the knowledge, but the audience ... that just has to be cool, you know? (Vlins, artist)

His answer shows how at least some current artists perceive hip hop music production. According to this artist, production quality is not a necessity in the current hip hop music industry. It is therefore not required to invest in a professional recording studio, which reflects the low entry barriers of today's music industry. Of course, there is still an acknowledgement of the difference between amateur and professional production, however, this difference is perceived not to be noticeable by or valuable for the consumers. The artist's perception on the relevance of production quality will shape current music and its boundaries, shrinking that role of large record labels in providing the requirements for producing with the traditional standard. If indeed this is a growing trend amongst successful DIY hip hop artists and the production quality will not restore to its traditional standard, record labels would keep losing value in the eyes of artists.

4.1.2. Search for affordable, high production quality

A paradoxical second sub-theme emerged from the data. Rapper GHQST – who did seem to show a strong DIY identity – contradicted the perspective expressed in the previous section:

That has to do with the feeling and the ... uhm the professionalism, that equals the work you are going to deliver, your music you know? So if you work from home, it's nice, a homely feeling, but uhm ... it doesn't add to what you do to your craft. It's a kind of energy thing, the environment where you are, is also going to bring out who you are and what you do, and I noticed that a lot in professional studios. (...) [Recording at home is good] for demos maybe

or for Soundcloud or something, but I don't think you should do that for a Spotify or Apple Music thing. (...) That is not... It is not... that is again that professionalism that is in it. Otherwise you will be seen as a Soundcloud artist. (GHQST, artist)

Interestingly enough, this artist puts much value on production quality. Even though being regarded as a Soundcloud artist does not mean the artist cannot be a professional or have substantial income – as explained before by mentioning different Soundcloud rappers who grew into the mainstream – this interviewee seems to express a negative connotation to the term 'Soundcloud artist' by excluding it with 'professionalism'. GHQST clearly does not want to be viewed as a Soundcloud artist and therefore strives to release music with high production quality, showing an other side of DIY artists. Their influence on current intermediaries can be different because they will rather need supplementary resources for music production. Whether it be extra financial resources or technical skills that are required to ensure high production quality, investing intermediaries would become increasingly important for those DIY artists. Because DIY artists generally dislike the involvement of traditional record labels, they would have to focus on alternative investors for music production. For this, the artist GHQST recalls:

I just want to work in a real studio, you know, a professional studio space, where you can start making an album, you know. (...) That is what I noticed with professional studios. We were at the Mooie Jongens studio, and there we made fucking sick tracks for SMIB-tapes, you know?

The rapper names Mooie Jongens as an example for a studio that was professional enough to be able to create good music in his perception. According to their official website, Mooie Jongens is a company that rents out professional studio time and various products for live performances (<http://www.mooie-jongens.nl/>). The rental service thus already invested in expensive equipment and enables musicians to rent professional studios per day. Now that DIY artists act in a market where they have more potential, this data suggests that professional studio rentals are an effective way to enable high production quality for DIY artists with inadequate financial resources to own one themselves. Rental studios are again a method for DIY artists to avoid supplementary investments from other intermediaries.

4.2 The expression of DIY ethos in the digital age

While the current music industry creates new possibilities for DIY hip hop artists, the DIY approach is of course not a new set of values in the music industry, as explained earlier in the theory section (Den Drijver & Hitters, 2017; Guerra & Costa, 2016). However, these existing DIY ethics can express themselves more actively nowadays. Important elements of the DIY ethos – the feeling of and strive for empowerment, autonomy, democratization, and decentralization – are goals that can be strived for more easily in today's industry. There is now the option to produce music without requiring other parties as investors, distribute music more easily without the mediating role of labels and promote music without or at least with less of the gatekeeping role of traditional media. For DIY artists this thus means that their already existing ethics can now be expressed more effectively for building a career in the music industry, impacting the role of intermediaries accordingly. Different visions and motives that are typical for DIY artists were expressed throughout almost all artist interviews, clearly showing the presence of DIY ethos with local hip hop artists. This main theme will present the most important findings that came out of some valuable expressions of DIY ethos.

4.2.1. Belief in independent success

Rapper Vlins mentioned the following during the interview: 'Whether something really blows up depends on the public. Always. The listener determines what is hot' (Vlins, artist). The interviewee's strong belief in the power of consumers relates to the DIY artist's strive for democratization and decentralization and the dominance of streaming platforms in the consumption of music. While one can argue that the public has always been dictating which music becomes popular to some extent, the influence of the consumer's individual preference seems to have increased due to new digital consumption possibilities. Streaming platforms have decreased the searching costs significantly for consumers, causing consumers to be able to be even more critical about what music to consume.

This is a beneficial development for DIY artists, who generally have a harder time promoting their music through the radio or other traditional media. If the media saw no potential in a DIY artist, their traditional gatekeeping role would cause little exposure of the artist's music to the public. Together with the high searching costs for consumers with physical distribution, the public had less say in determining which music should be popular. Right now, according to the participants, these structures have changed due to technological developments, which enabled consumers to search for their own preferred music easier. Relating to the earlier point of the broadened hip hop market, this development also contributes to the emergence of different niche markets, empowering DIY artists by now being more able to be a professional musician in other markets than only the mainstream

market. The answer of this interviewee shows that artists are at least to some extent aware of the current power of the public, whereby they let themselves be inspired to perceive their music to be the gateway to success, instead of traditional media being their gatekeeper to success. This development fuels their belief in the independent approach. One of the experts shared a supporting statement to this, by explaining the new insights digital distribution enabled:

(...) Because it was also a bit how when Spotify really came up, and so you can see real life statistics. Not because some old white guy says, 'this is really good music, because there's guitar', you know. Now you can just look with statistics. What's really popular, you know?
(John, expert)

What this quote suggests, is that where music professionals were dependent on traditional media before – for measuring the potential of music – Spotify and other streaming platforms now give direct insight in how the public reacts to certain music: if the public does not like the music, they will stop streaming. Also more notably, if the public likes the music, they will keep streaming. So even if the DIY artist gets no initial support from traditional media or for example Spotify's editorial playlists, the public can find their music and stream it endlessly, undermining the traditional power structures of the music industry. It seems that DIY artists are aware of the current, more beneficial industry for their approach to be successful. Rapper Vlins showed awareness of these industry changes and seems to feel empowered because of this:

What I just said to you, I have a part-time job for 24 hours a week. I am independent. Clips aren't that important anymore. I don't even invest that much money in my clips. I can mix and master myself. I arrange making beats myself, I arrange featurings myself, I have the studio myself. What do I need from them then? (...) The revenue model [of the independent approach] around it and the freedom with that revenue model is worth much more to me than, say, signing for a major and then after two years having made how I would like it. (...) My photographer is my mate, my co-producer is my mate. If I need photos, I'd rather outsource it to a mate than to an external factor. (Vlins, artist)

While reflecting a clear belief in the possibility of independent success, this artist breaks down different elements that need to be facilitated in his perception, to initially be able to build a career in the hip hop music industry. He points out that his part time job provides him a sufficient amount of resources to finance everything that is required to support his music career: (resourceful)

music videos are not that important anymore, the mixing and mastering of his music does not need a professional, collaborations can already be organized, and there already is a studio to record music in. It ultimately means that intermediaries like record labels are not perceived to be able to add value to his situation, because his own resources already meet the desired requirements for supporting his career. Tasks that he can not fulfill himself, he preferably outsources to friends, and besides not needing additional resources from intermediaries, he calls the revenue model of the independent artist a lot more valuable than that of a major artist. He mentions the allocation of percentages of income later in the interview:

Then I draw 85 percent to 90 percent away from myself so that they give me cool music videos and a bit of a push. Then I get 15 percent of all incomes and then I have to hope that I get crazy shows because of them. Of which they also want 30 percent? Bro, I'll just work 24 hours a week. (Vlins, artist)

The vision of this artist is a strong representation of the DIY mentality, striving to keep as much in-house as possible, maintaining ownership, and believing in outsourcing to close friends and relations (Den Drijver & Hitters, 2017; Guerra & Costa, 2016). Supporting an emerging rap career with only a side job and some friends is an approach that is only made possible in today's day and age. If this is a globally emerging vision in hip hop music, than the position of existing intermediaries in the hip hop industry would shrink accordingly. Another strong expression of this belief in independent success was made by rapper and label owner Sammie Sedano. The artist has had an artist deal with major label Sony in the past and is now pursuing his own career and that of his label signees independently. After being asked when he would consider working with a major again, he explains why he is only interested in distribution deals:

I am convinced that I can do better at the moment. Not earlier. I couldn't do better in the past. Now it is. I have now made those hours, I have now seen things, I was allowed to do things. Now I can. [...] Because the percentages are lower. The freedom is more ... and if you look at it that way, bro. If you as an artist already have everything, what do you have to do ... you pay off percentages for your creative director, you pay off percentages for this and this and this. All those people you don't need. You only need placements. And distribution is also half of that. (Sammie Sedano, artist & expert)

Sammie Sedano states how he has learned from his time at Sony. According to him, he has experienced enough to be able to implement the skills and insights that are required to build a career in the music industry. This explanation really shows how current DIY hip hop artists view the value of record labels. Now that he has learned how Sony does business, the only remaining worth of the major record label in his eyes is their ability to arrange placements. He does not perceive their financial resources, manpower, decennia of experiences or networking as being valuable to his career. After this quote, he goes on explaining the relevance of distribution deals by providing examples of different well-known Dutch hip hop artists who have set up their own record label and are profiting by only having distribution deals, just like many rappers are having careers with only distribution deals. A vision like that of Vlins, Sammie Sedano, or other DIY artists would therefore increasingly impact the music industry in the coming years. A&R Terry expressed his perception on the developments of DIY hip hop music in his interview, implicitly forecasting significant developments in the hip hop industry. He explains how this DIY hip hop movement has only been emerged since one year, which suggests that developments are expected to carry on in the coming years, and DIY artists can play a significant role in the potential restructuring of the industry.

Yes, it is interesting that you, that you specifically have that as a subject, because it is of course also quite, quite topical, that we ... I think that for a year now we have been having that DIY movement (...) and it is interesting, because we are actually, let's say, in this whole thing in the Netherlands what we call the hip-hop industry, is actually, except for the roots, really moving for maybe six, seven years, as in the real, the business side and, and, and how big it gets. (Terry, expert)

4.2.3. Inner conflict between art and commerce

To start, why do you make music? (Hermon, researcher)

Uhm yes, just as an outlet anyway. And I just started doing this so early as an outlet that it, after a while it's kind of gets a habit right? So, then it settles into you, and then you can just actually, just like sports or something else, then you really can't live without it. (Kauwboy, artist)

What do you care about the most? What do you want to achieve? (Hermon, researcher)

That's quite ... that's a bit of a conflict that I have. Because on the one hand, I just do it ... look I would do it forever. But on the other hand, I also do it because I want to earn something with it. Have to earn something with it. (Kauwboy, artist)

These quotes illustrate the characteristic inner conflict of the DIY artist. The first quote expresses the intrinsic motivation of the DIY artist, whereby creating music is interpreted as a necessity rather than a choice. Financial incentives are therefore less valued than intrinsic motivations, and these values should always be strived for (Den Drijver & Hitters, 2017). However, an artist who wants to live off making music will end up in situations where concessions are required to develop the career. In that case, one will have to chose between (DIY) values or developing the career. This conflict is expressed in the second quote of this interviewee. The artist explains he experiences an inner conflict between passion and monetary gain. When commercialization of the art comes into the equation, it becomes a struggle to find a balance between these two incentives. For this artist, the inner conflict has the following outcome:

I would never sign with Top Notch, but I would think about Noah's Ark, because Noah's Ark is kind of a real household, right. That is like a kind of family. (...) Well, that's the same as I would, wouldn't sign with SPEC, but say I would sign with Wilde Westen. (Kauwboy, artist)

Even though Top Notch and SPEC are top performing companies in their market, this artist would choose for labels that are known for their cultured and less commercially-driven identity rather than companies that are more known for their commercial approach in doing business. Throughout the interview, this interviewee kept expressing a negative perspective on the commercial or even business side of the music industry, based on many experiences in the Dutch hip hop market. This quote suggests the artist is looking for a family feel when signing with a label, indicating that such labels offer higher levels of trust. DIY artists are often characterized by valuing the art as the most important, and a company that has a too commercially-driven identity would therefore not be trusted by a DIY artist (Bernardo & Martins, 2014; Den Drijver & Hitters, 2017). This is a perspective that will have an influence on the role of intermediaries if the DIY ethos in hip hop will continue to express itself in this new environment. Large companies with a traditional outlook on the working atmosphere would partially lose the interest of DIY artists who now have relatively many alternatives to choose from compared to before, weakening their competitive position in the music industry. In the case of Kauwboy, this preference caused an independent approach in the music industry with only a close friend as manager. The only outstanding offer that he is seriously considering right now

is from a label of another close friend of his, which clearly illustrates his need for mutual trust and strongly suggests the presence of DIY ethics.

4.3. The changing landscape of intermediaries

The last main theme focuses on some major changes in the field of intermediaries. It seems like the roles of intermediaries has changed significantly and will keep developing along with the whole music industry. In addition to the effects on intermediaries that are explained up until this point, this theme focuses on the field of intermediaries even more.

4.3.1. Growing role of substitute intermediaries

In the past, the dominant power of majors kept the amount of possibilities for music artists relatively small. One could generally only choose for record labels to support their career in the mainstream market. It was therefore difficult to build a professional career without working with large record labels, because other supporting options were not that available for local artists (Vito, 2019). However, DIY artists typically feel disconnected with these large corporations. Having DIY values would this way minimize the options, possibly hinder the career, and thus not work well in that music industry. However, after the devaluation of some unique selling points of record labels in the eyes of artists, other intermediaries that can act as a substitute for (specific) services of traditional labels seem to have emerged. Besides traditional record labels deals, artists can now make deals for more specific services with different partners more easily: with distributors, booking agencies, managers, publishers, or a combination of them. The amount of relevant options for an aspiring artist increased, and it is now up to the artist to decide how to fulfill their different business tasks and which party to work with. The interviewed artists all had different experiences with how to fulfill these tasks, illustrating the changed landscape of intermediaries. While rapper Wolf's requirements are fulfilled by only having signed a record deal some years ago, the rest of the interviewed artists have (also) had experiences with other service-specific intermediaries: Sammie Sedano had a management deal before he signed with Sony Music, GHQST has used a publishing deal in the past, Kauwboy has a management deal but received multiple record deal offerings, and Vlins stated the following:

I've been offered three deals. (...) One management, one publishing, one label. I've only accepted that management deal, we are talking about that. I immediately rejected the label deal. And publishing I'm sort of negotiating. (Vlins, artist)

Their experiences with intermediaries show how current music artists encounter more different opportunities to support their business with. This is a development that will only empower DIY artists even more. An aspiring DIY artist with values that do not admit traditional record labels, would now have more chance of success than before because there are simply other, relevant alternatives available. An increasing share of DIY music in the industry would thus not only translate into a smaller role of record labels, but also an increase in the role of intermediaries that substitute (specific) label services. Such an increase in substitute intermediaries can already be seen in the industry. For example, record label and distributor AWAL (Artists Without A Label), which allows artists to maintain ownership over their recordings and claims to be a "unique alternative to the traditional music label", seems to grow exponentially in popularity (<https://www.awal.com/company>). Just recently, AWAL announced that their amount of artists earning over \$100,000 annually from streaming revenues has grown by more than 40% compared to last year (AWAL, 2020). AWAL's own annual revenue also grew explosively in 2018, by bringing in over \$106 million compared to \$57 million in the year before (Houghton, 2019). The impact of managers and booking agencies in the music industry is also expected to have grown significantly due to the popularity of DIY music. According to an article by Complex, managers were already becoming increasingly important in 2014 (Shipley, 2014). The recent growth of parties like AWAL or management agencies seems to be related to the emergence of independent music. This suggests a significant shift towards alternatives in the industry, which are only expected to grow further alike independent and DIY music. The following perspective of DIY rapper GHQST illustrates the current importance of service-specific intermediaries for DIY artists. After being asked which collaborations are perceived to be required at minimum to be successful without a record label, he answered:

You need a bookings agent, you need a manager, you need a, what do you call that... publishing. (...) You have a, yes, you still need something that can help media wise. You know, the newspaper or, or Vice (GHQST, artist)

A plucker? (Hermon, researcher)

Right. These are just your requirements. (GHQST, artist)

In his perception, an unsigned DIY artist should have a manager, a bookings agent, publisher and a plucker or PR person. This is a set of different intermediaries that can altogether serve as a

substitute for the main services of a record label. Unlike traditional practices, DIY artists can now manage to gather a whole supportive team of professionals to back up their business. The expectation that logically follows, is that DIY artists using a team of multiple specialized professionals is going to be more common in the future.

4.3.2. Importance of codified industry knowledge

It is clear that the music industry and hip hop culture have changed enormously in favor of independent and DIY artists. Their values can be expressed more effectively, and the current structures of the industry created more opportunities for them to succeed. However, this does not mean that the traditional power structures have vanished completely. Industry expert John explained how hip hop artists specifically have to work harder than artists of other popular genres due to these structures:

Look, hip hop and related, is by far the most popular. Only on 538 they don't play that. While at 538 your played tracks is such a part [illustrates a large part with his fingers], you can't see, is a fucking big piece, compared to getting played on FunX, you get a few cents. Do you understand what I mean? At 538, you might get 14 euros per spin. You understand? So say it's just, say the, the, the, the, there are actually a lot of dynamics that have stayed that way. Only the way of producing and distributing DIY is just 100 percent. You can do it 100 percent DIY. (John, expert)

As much as the industry has changed, the traditional power structures are still visible to some extent, according to the interviewee. The above quote acknowledges that traditional structures persist. Traditional media can still be valuable to music artists but are also still underpaying hip hop music, and major labels still have a competitive advantage compared to smaller or independent labels due to their extensive amount of financial resources, valuable relations, and decades of experience. Most artists do acknowledge this based on the interview questions asked on their perception of the current value of labels, by naming the specific added values that labels can provide. Some acknowledged the fact that the independent approach takes more time and effort to ultimately reap the benefits, which also arguments the competitive position of majors. Some illustrating statements from different artists are listed below:

They are very important, man. Yes, because they have all networks as well, and yes exactly. They just have all the links you need, the radio or TV. Say, other artists you would like to link. (GHQST, artist)

[Signing with a major,] I would, uhm ... I would, and not even for the money, but for the connections I would ... cause I have a few guys who just only make loops or you know, small ideas. They're with majors, and they're just flown to LA. (Kauwboy, artist)

So I think the main, the three main things, it's like money, like economical support, um, connections and, uh, an advertising. That's the main three, three things. (Wolf, artist)

These are some examples from the artist interviews expressing their views on the value of record labels. A recurring pattern throughout the interviews was their focus on network when it came to the added value of labels. After performing the expert interviews, it became clear how the artists seem to have a much different view on the label's value than the experts. While the artists' answers can be summarized to financial resources and networks, experts additionally emphasized the value of the industry knowledge and experience of large labels and majors. When asked what such a label can add to an artist besides financial resources and a strong network, the answers of Terry and Daniel were the following:

(...) the fact that you have a dedicated A&R and project manager, who in turn manage the other departments, from streaming, project management, brand partnerships, digital marketing, data research, creative agency, legal ... And so you have a couple others and these are actually all used (...). (Terry, expert)

So well, PR, marketing, the expertise, the A&R, so that you just get helped in kind of the right studio, maybe the right partnerships, making kind of cohesive work and all kinds of opportunities that that offers, through the network that such a party has built up for 20, 25 years, sometimes shorter of course. But uhm, yes just more people who can already say something about it. (Daniel, expert)

The experts try to explain how large labels provide a whole team of people to support every element of the business of an artist. Different specialists are used to make sure that every aspect is covered, and they help to develop a strategic plan in building careers. Of course this does not mean

every individual artist should sign deals with labels; every artist should discover what the elements are in one's specific career that can benefit from additional support of a third party. However, the gap between the experts' knowledge and insights on labels and that of the artists shows the significance of understanding the industry and its intermediaries. As label owner Marc said: "A lot is possible, but it remains a very difficult, complex industry where a lot of know how, experience and knowledge is essential" (Marc, expert). The music industry is thus already a complex industry, and the developments in the last years required hip hop artists to professionalize their business to a higher level. As an earlier quote of Terry stated, this is a development that only occurred since the last six or seven years in the hip hop music industry because of the growth of the genre in the mainstream market, causing more money to be in circulation. Especially since artists act in a market with a wider scale of available intermediaries, in addition to the growing professionalism in the hip hop music industry, doing business seems to have become an even more difficult task for a DIY artist. After asking hip hop artist manager John what has changed in his field over the years, the answer was the following:

(...) Hip-hop wasn't really selling anyway, but since streaming came, it's now, now there is money to be made, you know. And yes, there is a lot of money to be made now. (...) Because more money is involved, people have to professionalize and it becomes, managers become more necessary. (John, expert)

The current scale and complexity of the industry therefore requires a professional view on that industry, which made the role of artist management increasingly important over the last few years. Traditional record label deals would cover most aspects of business, so there was less of an incentive for artists to deepen one's industry knowledge. Because DIY artists often dislike the involvement of large, commercial corporations, it is even more important for those artists to understand what the different intermediaries are, how they operate and what their specific added values can be to their individual careers. Deepening in the business side of the music industry seems mainly reserved for the entrepreneurial artists. This is also supported by the interview data: "It also depends on who you are as an artist. If you are very entrepreneurial, you can do everything yourself" (Vlins, artist). Sammie Sedano, the only interviewed artist with his own company, also strongly expressed an entrepreneurial identity. After being asked what was most valuable of his time with Sony Music:

I think like an internship. I was actually, apart from being an artist, I was secretly also an intern, because I watched the marketing manager, I watched the lawyer, I checked all my contracts, I checked all my contracts myself point by point. I checked all mail traffic, the way they were plugging. I was watching everything, I just wanted to see everything. I wanted to know everything: who does what, why do they do what, when. (Sammie Sedano, artist & expert)

His answer suggests that he understood what it takes to succeed as a music artist, which caused him to indulge himself in the codified industry knowledge of the industry. However, it can be a difficult task to go that in-depth, especially when it comes to DIY artists who purely want to focus on creating the art and feel a disconnection with the business side of their career.

That TuneCore, and uh ... and I think that's really a blessing for a lot of guys. A lot of guys like me, that ... I didn't want to delve into it for a long time because it just sucks, but after a while you have to. (Kauwboy, artist)

Why do you think that sucks? (Hermon, researcher)

Yeah... artists are often, say a bit more creative minds than businesspeople. So that's why I took a management, because otherwise shit just won't get done? I am ... I prefer to just be in my creative process, and I prefer to outsource the rest. (Kauwboy, artist)

While some DIY artists indulge themselves in understanding the business to enable working around it, this point of view matches the values of another type of DIY artist. They primarily want to focus on the art, create the music, and outsource the business activities as much as possible to a reliable party. In the interviewee's case, the artist dislikes deepening his industry knowledge and – as quoted earlier – companies with a corporate feel, therefore he outsources most business activities to a close friend who is his manager. This way, artists can just work with managers to keep their creative control and ownership of master recordings, while business is taken care of by a professional party that the artist trusts. This type of DIY ethos in hip hop contributes to the weakening of the role of large record labels and strengthen the relevance of managers. In any case, it seems like the role of managers in the music industry will become even more important in the near future.

5. Conclusion

This research tried to find valuable insights on the current and future state of the music industry by focusing on the increasingly impactful positions of both DIY music and hip hop music, based on the following research question: *Are DIY ethics present in local hip hop production and in what way does this shape the role of intermediaries?* Five interviews were performed on hip hop artists to discover their perception on different intermediaries, and four other interviews were performed on hip hop industry experts to support my understanding of that industry, which together enabled the formation of valuable insights on the perception of DIY hip hop artists and its meaning for the industry. Besides providing relevant context to the music industry, hip hop music and DIY ethos, the theoretical framework suggested three developed states of the music industry as a result of the recent digital revolution: disintermediation, intermediation, or reintermediation (Bernardo & Martins, 2014; Galuszka, 2015; Guichardaz et al., 2019; Hracs, 2012; Hviid et al., 2018; Vaccaro & Cohn, 2004). This research thus tried to reveal if DIY ethos are present in hip hop music and how the perception of DIY artists impacts the roles of different intermediaries in the music industry.

The literature study firstly showed that DIY ethos seem to be present in past and current hip hop culture due to similarities in both core identities and examples throughout hip hop history: both are rebellious, anti-establishment and socio-economically vocal (Bennett, 2018; Den Drijver & Hitters, 2017; Rose, 2000; Vito, 2019). Throughout history, artists like Frank Ocean, Chance the Rapper and Q-Tip of A Tribe Called Quest have also expressed their discontent with the music industry and its (major) record labels (Mama, 2019; Rys, 2016). The recent popularity of the genre could therefore be the result of the strong match between DIY ethos, hip hop music and the now digitalized industry. In this case, the recent technological developments finally enabled realistic and effective opportunities for success for DIY hip hop music that did not have opportunities alike in the past, causing the genre to now become the most popular music genre globally (Lynch, 2018; Zhang, 2020).

While not all interviewed artists explicitly laid out DIY values, multiple expressions made in almost all artist interviews do point towards the presence of DIY ethos in hip hop. A recurring theme was the artist's perceived empowered position in the industry. As Vlins clearly broke down in the interview, every element of his business is already independently covered with the income from his side job and creative friends and acquaintances in his environment: "For what do I need them [record labels] then?" (Vlins, artist). Rapper and independent label owner Sammie Sedano went even further and believes that his own abilities exceed that of a major record label when it comes to developing his career as an artist: "I am convinced that I can do it better" (Sammie Sedano, artist). Even a deep aversion to the involvement in music business as a whole was expressed in the interview

with Kauwboy, which has in his case resulted in a strong need for trustworthiness when considering intermediaries and an aversion to corporate record labels. The critical views at record labels, the outsourcing to friends and the belief in own abilities are just some examples of the expressions made that strongly indicate the presence of DIY ethos in hip hop music, when comparing these values to the theory on DIY ethos (Den Drijver & Hitters, 2017; Guerra & Costa, 2016). What makes their values meaningful for the music industry is the implementation of these values in their careers. The literature study explained how signing a record deal was regarded as a huge milestone for hip hop artists in the past, but it seems like this is not the case anymore (Keyes, 2004; Vito, 2019). Hip hop artists are becoming increasingly aware of their new competitive position in the digitalized music industry and are putting this awareness into practice with their careers, which agrees with literature of multiple scholars (Bernardo & Martins, 2014; Hracs, 2012; Young & Collins, 2010). Practically, this would mean that current hip hop artists are less keen to sign a record deal, resulting in a decrease in artists to work with for record labels. Economically, the competitive position and value of record labels would therefore shrink accordingly. This relates to theory by

Insights from the interviewed experts explain how this new belief in independent success of DIY hip hop artists is not only the result of the lowered barriers to create, distribute and market music (Bernardo & Martins, 2014; Guichardaz et al., 2019; Hracs, 2012; Hviid et al., 2018; Vaccaro & Cohn, 2004). The increased availability of self-released music has also caused a development in hip hop culture to the point where a broader spectrum of hip hop music is accepted by the market, a change initiated by the devaluation of production quality. This effect transcends the known, direct effect of technological developments on the production, distribution and marketing of music that current literature extensively explains. The weakened gatekeeping role of record labels and radios caused the industry to lose grip of traditional quality standards, enabling DIY hip hop artists who cannot ensure high production quality to still pursue a career in the music industry (Hracs, 2012; Oliver, 2010). As a result, many hip hop artists have succeeded to reach mainstream success on DIY platforms like Soundcloud with production qualities that record labels would traditionally not approve. For major labels this means that they have lost their dominant gatekeeping role in the industry and some of their power is thereby reallocated to the artists who manage to build a career without the traditional production quality standard. On the other side, there are obviously also DIY artists who do not want involvement from record labels, but still value high production quality as a requirement for their music. Based on interview results, it seems like rental studios are becoming more important for this type of DIY artist. This way, artists with low financial resources will gravitate towards rental studios more, because buying equipment that ensures high production quality is often still too expensive to local artists.

The contrast between findings in the literature study – that signing a record deal was a necessity and a milestone in hip hop music – and the critical statements made by the interviewed artists is significant and illustrates the shift in the music industry (Keyes, 2004; Vito, 2019). Even if hip hop artists in the past were already skeptical about record deals, the competitive position of record labels was so dominant that the artist's bargaining power was little (Oliver, 2010). However, now that the label's value in the market is decreasing and not as dominant, artists are becoming more critical of record deals because they now have alternatives. Therefore, it is expected that labels have to innovate to be able to still be perceived as valuable by music artists in the digital age. This expectation was also stated by scholars such as Hracs (2012). A record label like AWAL seems to understand this and anticipates on the changing power structures by focusing the marketing of their company on admitting the empowerment of artists and providing ownership, freedom and control to their artists (AWAL, 2020). However, as of now, the research data did not imply any form of reintermediation as suggested by scholars such as Guichardaz, Bach and Penin (2019).

Where the music industry had record labels as the dominant intermediary in the past, the outcome of this research suggests that the industry will consist of different significant intermediaries instead of just one dominant party (Oliver, 2010). The results showed that this development – at least in the hip hop music industry – has already taken place. The interviewed artists all had different experiences with intermediaries. While the record label was still a recurring intermediary in the interviews, other intermediaries also were valuable enough to be taken into consideration by artists. This means that local artists are now also perceived as valuable to do business with. Now that hip hop music has grown to the point where more artists can create income in the industry, these substitute intermediaries are becoming more available in local hip hop production. With DIY artists moving away from traditional record labels, it is therefore expected that other, more service-specific intermediaries like managers and bookings agents will become increasingly popular in the music industry. Because of the specificity of these intermediaries, this will not only result in a broader scale of available intermediaries for local artists, but also a higher amount of intermediaries that are involved with one artist than before. The complexity of the industry will ensure that only the entrepreneurial artists with a strong vision that invest a lot of time in understanding the business would be able to build a career without a label or manager, as the interview data showed. This approach will thus only be reserved for a certain type of DIY artist. In other cases, DIY artists that do not want to work with labels will at least need management because of the necessity of codified industry knowledge. Therefore, the field of management seems to be the intermediary that grows the most among DIY music.

Altogether, the empowerment of DIY artists is clear, and they are acting on it. As a result, major record labels lost their gatekeeping power in the industry. Independent music keeps growing, and, at the time of writing this thesis, the discourse about independence in hip hop culture continues to grow and more artists are speaking out against signing away master recordings to record labels (Daniels, 2019; Ingham, 2020). If this is an ongoing trend, even more artists will change their perception on the valuation of record labels, which is an impactful development for the traditional role of record labels: they are losing part of the value that was contained in having the exclusive ability to produce, distribute and market a markworthy product on a global scale. Labels would thus lose a significant portion of their market share because artists do not feel like they have to work with record labels for success anymore; artists are internalizing the practices that were fulfilled by intermediaries like record labels before (Benjamin & Wigand, 1995; Bernardo & Martins, 2014; Hviid et al., 2018). The This new vision suggests disintermediation and has also proven to work in practice, which is a significant change in the traditional power structures of the music industry (Hracs, 2012; Oliver, 2010). Other, more service-specific intermediaries like managers, PR persons, and booking agents that could replace some of the tasks of traditional record deals are expected to grow along the lines of DIY music's growth. The grown relevance of these intermediaries in the industry would thus result in intermediation, at least through the significantly growing power of other, existing parties instead of the emergence of a new party (Galuszka, 2015; Guichardaz et al., 2019; Hviid et al., 2018). Regardless of the intensity of these changes, it is clear that all players in the music game will notice some impactful developments in the power structures of the music industry in the coming years. The more the popularity of hip hop grows, the more DIY hip hop will grow, the stronger it will impact the power structures of the music industry.

5.1. Limitations and further research

The research tried to find if DIY ethos are present in hip hop artists. Literature on DIY music is thereby used to determine its presence in hip hop based on the expressions made by interviewees. Even though findings based on self-reports are avoided, these expressions of interviewees are still a statement on how they think they feel about something at this point in time. This should not cause problems with the interviewed experienced hip hop artists, because they are further in their career, have already had multiple serious encounters with intermediaries and thus are presumably more aware of the music industry. With artists who are rather in an early phase of their career, it is possible that their current perspective on the music industry is one based on ignorance. A realistic consequence of the current discourse about independence is that unexperienced artists adopt the DIY perception, even though they possibly do not have the required skills, characteristics or values to

be successful with this approach. With time, they will eventually learn what they really can do successfully on their own. Artists who are further in their career, on the other hand, would have had enough experiences to determine more realistically what they can do and what they cannot do independently. A couple of the interviewed artists are in an early phase of their career, so it is reasonable to take into account that they can change their perspective quickly when their awareness of the music industry grows along with their career. If this is the case, the impact of DIY music based on this research would be different, because their perspective and thus impact changes when they grow and amplify their impact as an artist.

The music industry is often subject to change due to the fast pace of technological developments (Bernardo & Martins, 2014; Vaccaro & Cohn, 2004). On that account, the field of research on the music industry can quickly not be adaptable anymore for the contemporary state of that industry. The literature study in this thesis therefore misses theory on recent developments, which could have added valuable insights for the research. For example, new theory on the recent popularity of streaming platforms and its impact on independent musicians and the music industry would presumably be valuable for understanding the empowerment of contemporary DIY artists.

An unforeseen contextual obstacle for performing this research was the sudden COVID-19 outbreak. The virus reached the Netherlands when I was in the middle of writing the thesis, and a national state of fear followed in the first period. It was therefore difficult to remain focused on the research while COVID-19 became an increasingly urgent topic in our daily life. Besides demanding headspace, the virus also caused the temporary closing of all study or workplaces near my place of residence. This turned out to be a greatly unfavorable context to work in, by having a limiting impact on my efficiency and effectiveness doing research. Also, one of the artist interviews that was already scheduled, was eventually cancelled by the artist due to the COVID-19 outbreak. Because of this, one less interview was performed than initially planned. This artist has had a notable independent career in the hip hop music industry, so the research lost a potentially valuable view.

Quantitative research on DIY hip hop should be performed to support the found impact of DIY hip hop music on the industry. Researchers can focus on the changing landscape of intermediaries, and determine the growth or loss of the relevant intermediaries in relation to (DIY) hip hop artists. The aforementioned limitation concerning the perspectives of unexperienced artists can also be tackled by finding the concrete statistics on the roles of different intermediaries. For example, a concrete growth in popularity of management should be found among local hip hop artists. Comparing perspectives of artists in different phases of their careers can also be researched, to find if DIY ethos are persistent among hip hop artists throughout a whole career. For example, if many artists lose their DIY values when they have the opportunity to increase their income

substantially, then the impact of DIY hip hop will primarily happen with smaller artists. However, the impact of an artist gets more significant when they grow. Research on this topic can therefore provide interesting information to not only the impact of DIY hip hop, but also the contradiction between the DIY ethos and materialistic values in hip hop music.

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7. Appendix

7.1. Appendix A: List of participants

Name	Age	Profession	Active in the field since	Current intermediaries	Former intermediaries
Vlins	24	Rapper	2018	Management	None
Wolf	24	Rapper	2017	Independent record label	None
GHQST	23	Rapper	2013	None	Publishment
Sammie Sedano	28	Rapper	2012	None	Major record label
Kauwboy	26	Producer & rapper	2013	Management	None
Daniel	34	Bookings agent & manager	2012	-	-
Marc	52	Label owner & manager	1995	-	-
Terry ¹	24	A&R	2014	-	-
John ¹	34	Manager	2011	-	-

¹pseudonym is used at the request of the individual

7.2. Appendix B: Topic lists

7.2.1. Artist interviews

Introduction

- What is your age?
- What is your creative role in music production?
- When did you start making music?
- In what year did you start having a professional career?
- Did you sign any deals or had any offers?

Motivations & DIY ethos

- Why do you make music?
- What topics do you talk about in your music? Do you consciously want to tell a story?
- What do you care about the most as an artist?
- What do you want to accomplish with your career?
- How big of an artist do you want to grow into?
- Would you want to be signed to a major record label?
- How do you want the public to perceive you?
- Do you want to keep every aspect of music production and business as close to yourself as possible? Why (not)?
- What do you feel when you think of the music industry as a whole?
- What do you think of the known narrative of music artists giving up some creative freedom to sign a record deal?

Digitalization

- How do you perceive the effect of digitalization on the production of hip hop music?
- How do you perceive the effect of digitalization on the distribution of hip hop music?
- Are there any practical differences with your music production due to technological developments since the day you started?
- The lowered entry barriers made it easier to make music. However, the competition has also increased because of this. What do you think of this double layered effect?

Intermediaries

- Did you sign any deals or had any offers? Why?
 - If you had a deal in the past, what made the collaboration end?
- If signed to label:
 - What are you benefiting from now, that you would miss without a record label?
 - What do you miss now that you can benefit from as an unsigned artist?
 - What did you expect from signing a deal and how did this come out in reality?
- If not signed to label:
 - What are you benefiting from now, that you would miss when you are signed?
 - What do you miss now, that you can benefit from with a record deal?
 - What do you expect from signing a record deal?

- To what extent do you think it is possible to build and benefit from a network, in comparison to the network of a record label?
- How do you perceive the current importance of record labels?
- When you started making music, did you need financial or business aid to be able to develop as an artist?
 - If yes, what did you think of receiving this help?
- Is there a ceiling for independent or DIY artists?
- Which deals do you think you need at minimum to reach commercial success?
- How do you forecast the long-term impact of corona for yourself?

7.2.2. Expert interviews

Introduction

- What is your age?
- What is your profession? For which company do you practice this profession?
- When did you start practicing this profession?

Digitalization

- How do you perceive the effect of digitalization on the production of hip hop music?
- How do you perceive the effect of digitalization on the distribution of hip hop music?
- Are there any practical differences with your profession due to technological developments since the day you started?
- The lowered entry barriers made it easier to make music. However, the competition has also increased because of this. What do you think of this double layered effect?

Intermediaries

- How far can a hip hop artist develop a career without the help of your profession?
 - How is this different than before digitization?
- How do you perceive the current role of record labels?
- How is the current role of record labels different from before digitalization?
- Is there a difference in the main types of closed deals in your profession with before digitalization?
- Is there a ceiling for independent or DIY artists?
- Which deals do you think an artist needs at minimum to reach commercial success?
- How do you forecast the long-term impact of corona for the independent hip hop?