

MUSIC, TECHNOLOGY & GLOBALIZATION

And then there were five...five major companies who control 80% of the world's distribution of music valued at U\$37 billion dollars in 2000 according to the International Federation of the Phonographic Industry (IFPI), the organization responsible for generating global statistics for music.

The majors are based in the USA (Warner) - France (EMI) – Germany (BMG and Universal) – Japan (Sony), all in the top five national music markets for the past decade where sales grew by 19% in terms of units sold driven by CD sales.

Control of the distribution and manufacturing of music has allowed these five multi-nationals to control the availability and price of the music product and thus the value added gains worldwide.

These interests, all of which, except for EMI – the only pure music company left, are owned by larger, non-music interests such as Vivendi which recently acquired Universal.

The strength of these giants lie in their catalogues as each has secured through acquisition of smaller labels such as Motown, Island, Stax and others, the creative product to sustain the manufacturing and distribution of music.

To maintain their cutting edge in the marketplace the majors rely on the smaller labels to A&R the domestic market in search of new talents and products to feed into the system.

For the majors, Jamaican music represents potential - an evergreen catalogue and a source of cutting edge creativity with global impact demonstrated over the past 50 years beginning with the migration of the Jamaicans into the UK and US and their influence of those cultures.

Over the past 50 years international record major labels from Atlantic to Epic, Capital to Columbia, RCA Victor to Virgin have signed Jamaican artistes following the lead of independents such as Asnes Records (Jiving Juniors 1961), Island Records (*My Boy Lollipop* 1963), Trojan (Lee Scratch Perry), 2-Tone (UK Ska), Moon (US Ska), Mango, Amy Records and later, VP Records, Heartbeat, Jet Star, Ras Records and Shanachie.

They hoped to capitalize on the obvious appeal of the music from ska/blue beat to reggae and dancehall, however, while their successes have been significant, they have been limited.

Outside of the Marley catalogue driven by the success of the *Legend* compilation which stayed on Billboard charts for years, the success of reggae through non-Jamaican artistes such as No Doubt, Whitney Houston, Tina Turner, Sting, The Specials, The Beat, Snow, UB40, Big Mountain, Ace of Base, Lauryn Hill, Wycleff, Nelly Fertardo and others, have dwarfed the commercial returns realized by any Jamaican artistes until Shaggy.

The success of Diana King (*Shy Guy* #1 in 14 countries), Ini Kamoze (*Hot Stepper* Billboard #1 Pop), Shabba Ranks/Maxi Priest (*Housecall* Billboard Top Ten) and Cobra (*Flex* Billboard Top Ten) in the early 90s sparked a renewed interest in the market for Jamaican music but it was not sustained by a continuous flow of stars and hits from Jamaica.

Shaggy with his 14 million plus selling *Hot Shot* album has again raised the flag for our music and has generated renewed interest in Jamaican music.

Other flavours are being added to the menu through the current success of Sean Paul's newest video *Gimme de Light* as well as the joints from Grammy winners No Doubt with successful collaborations a la Bounty Killa (#1 *Hey Baby*) and Lady Saw (*Underneath It All*) as well as videos from Beenie Man/Janet Jackson and Samantha Mumba/Damian Marley.

Over the last seven years, technological forces have impacted on the global music industry in critical ways to increase market impact and sales and to shift the lines of control between the record companies, artistes and the consumer. Of the many technical advances impacting on music in the last fifty years, the following recent milestones deserve special mention:

1. Music Television
2. Compact Disc
3. Sound Track
4. Internet
5. DVD

The advent of music television marked by the birth of Music Television (MTV) in the mid 80s revolutionized the music industry adding visuals to the package required to sell music. The station propelled the marketing of music beyond a pastime status reflected by the special programmes that featured music videos or live performances/interviews to a 24 hour activity filled with music videos, interviews and a new persona...the VJ (video jockey).

The purchase and consolidation of the leading global music television channels MTV/M2/BET/VH1 by Viacom recently is a significant share of the airtime under the control of one major media giant, similar to the news market share owned by the Turner Broadcasting Group (CNN etc).

Increasingly the musical lines which initially characterized each station is losing its edge and at any given moment the same video by Eminem or Jah Rule can be seen on two of the four stations simultaneously thus magnifying the market presence of select artistes.

MTV which when first introduced played purely rock & roll music and pop (R&B sung by whites or with sales in excess of a million) with breakthroughs for black music coming with *Beat It* by Michael Jackson and *Walk This Way* by RUN DMC and Aerosmith while VH1 was more adult contemporary programming.

Today Hip Hop is the order of the day and the youth culture has been infused in all programming with artistes like Nelly, Ja Rule, Eminem, Ludacris, Outkast, Jay-Z, JLo, Pink, Dre, L'il Romeo, L'il Bow Wow, P. Diddy, Mary J. Blige, Ashanti, Destiny's Child, Missy Elliot, Busta Rhymes, Eve, Alicia Keys, Mystikal and others dominating airtime over perennial video dons such as Madonna, Bon Jovi, Faith Hill and U2. Long is the list of Hip Hop's well-packaged and positioned talent supported by record company infrastructure compared to our one Shaggy but that's another story.

The control over this media group and the linkages between the majors and the media groups, ensures dominance in the market similar to what Microsoft was able to achieve with its monopoly on the windows programme.

The impact of this multimedia global promotion is reflected in the reduced time it takes today's artistes to achieve record sales levels over three albums, equal to what artistes prior to this, took an entire career to achieve.

The presence of Jamaican music or lack thereof on these channels due to issues of video quality, copyright or distribution, continue to significantly hamper potential sales of Jamaican music. Only an estimated 10% of the music being released in Jamaica is represented by videos with most unable to secure mainstream airtime.

The impact of Hip Hop and Pop on the Jamaican environment through cable and radio, which takes its cue from cable, has been overwhelming as with its impact on other youth cultures around the world...addressing that issue is also a part of that other story.

When compact discs were introduced in the early 1980s, many felt it would never replace the tried and true vinyl record...they couldn't have been more wrong.

As the price of the technology decreased, the labels made more material available on the CD format and the advantages of the CD sound were marketed, the CD conversion process supported by the consumer (vinyl to CD) drove a tremendous success story and increased industry sales by U\$10 billion between 1991 and 2000.

The number of albums sold on the CD format has risen every single year since first introduced in 1983 selling over one billion units by 1992 and has surpassed 2.5 billion units by 2000 with over 700 registered CD plants worldwide.

Although vinyl remains a nostalgic favourite for collectors, the format accounts for an estimated 1% of the world market – just enough to keep our presses running 24-7 and then some.

The CD technology has also enabled pirates whose effect is reflected in the fact that one out of every three music products sold worldwide is pirated.

The third milestone in recent years has been the rise in importance of the soundtrack. Soundtracks have been available in the market since the days of the movie musicals (*West Side Story/King & I/Oklahoma/Music Man* etc) and again in the 70s & 80s with successes like *Flashdance/Superfly/Tommy/ Hair/Saturday Night Fever/Big Chill/Grease*).

It was however, the blockbuster success of *Dirty Dancing* that heralded a new era for the soundtrack. Suddenly soundtracks became the new vehicle to increase artiste promotion and sales revenue as record companies and movie companies alike, scrambled to add soundtrack departments to their infrastructure.

In the 90s platinum soundtrack albums such as *Titanic*, *Bodyguard*, *Lion King* and *Waiting to Exhale* set the mark higher for this vehicle.

The blockbuster to watch right now is *Brown Sugar* starring Queen Latifah, LL Cool J, Eve and Cedric the Entertainer and a lead video with a fresh Hip Hop Erykah Badu (*Out of My Life*) helping the project to the box office top since its release.

Even television and awards shows are now marketed with soundtrack albums and artistes like Inner Circle benefited from the Cops theme song *Bad Boys* while awards shows such as Billboard, Source and MTV all release soundtracks.

Other notable television soundtrack successes in the US market and projected by global cable as far as Australia, include *Dawson Creek*, *Friends* and *Ally McBeal*.

Even the newest NBA play station game features hot tracks from your favourite artistes such as Snoop Doggy Dog and Busta Rhymes in the game as well as on the CD you get with your purchase of the game.

Soundtrack singles and their video now lead the promotion for new films with the stars often making cameo appearances in the music video to cross promote the project. On average one out of every three commercials on the Viacom media group is for a movie.

Jamaican artistes such as Diana King and Shaggy have had success with soundtracks, the latter with *Money Train* and sound track queen King hitting with *Bad Boys* (*Will Smith/ Martin Lawrence*), *My Best Friend's Wedding* (*Julia Roberts*), *First Wives Club* (*Goldie Hawn/Bette Midler*) and *Cool Runnings* (*Disney*)

The fourth milestone, the internet, is considered by many, the great equalizer. Anticipated to impact music in the 21st century the way music television did in the 20th century, the internet has delivered in its ability to promote music to a global audience.

The technology has advanced more rapidly than the record company structure or the legal structure, have been able to develop strategies to guide the delivery of music over the internet and other product spin offs in the techno age including games, cell phones and software.

To date much of the music has been distributed more through the illegal download of MP3s and MP4s from sites such as MP3.com and Napstar launched in 1999 rather than through sale of CDs from legitimate label sites or sites such as Amazon.com or Blockbuster.com.

The ability to promote artistes globally at a fraction of the cost of traditional marketing, has been an enabling factor for independent labels and artistes weary of the majors.

Distribution of music over the internet suggests a trend toward music being sold song by song not album by album. This shift will require the record companies to restructure themselves away from the album=revenue paradigm in order to survive in the age of custom compilations.

With billions at stake, there is no doubt that the industry will work out something to reshape itself and sustain in a dynamic environment. In 1998, the Digital Millennium Copyright Act (DMCA) was launched in the US as a first step to protecting sound recordings online and other regimes are being negotiated between product owners and users.

Cases against Napster, MP3.com and others illegally building a commercial business on the basis of copyright infringement have been settled in favour of the music industry with these sites being shut down.

While these victories will not erase the threat of piracy, both online and traditional, it is a clear signal that strategies will have to be developed to address the technological capacity and rights issues at hand.

Owned by noone, the worldwide web morphed into existence in 1995 with about 50 sites established primarily by universities and colleges around the world to facilitate the exchange of large amounts of information.

With over two million sites today, the internet has created a virtual global marketplace of intellectual property where surfers can access anything in terms of information from news to music.

Already governments, led by the US and EU, have stepped up the race with pressure being brought to bear at the trade table through the World Trade Organization and the World Intellectual Property Organization.

Even the artistes have gotten involved. While Michael Jackson has joined other artistes of colour in slamming Sony and Prince has turned to digital distribution as an alternative to major distribution, artistes such as Eminem, Britney Spears, Nelly, Missy, N'Sync, P. Diddy and others have joined a campaign to discourage internet piracy.

The campaign features public service announcements by the artistes urging their fans not to support the pirating of music - "to support music not steal it". Similar proposals have been on the table in Jamaica for some time to help stem the spread of piracy however little has come of that to date.

As technology continues to evolve, the digital formats in the market and on the horizon such as DVD and wireless formats are expected to recharge copyright values with conversion frenzy fed by increasing available catalogues and new material in these formats.

The DVD (digital video disc) allows audio and video information to be stored on a compact operable both in your CD player and on your computer with additional photos, interviews, videos, fan club, merchandise, etc. for your favourite artiste.

For this generation who do not know of a world without the internet or MTV, CDs or DVDs, the products of technology are not new things – they're just the next thing. The ease of this generation with technology is reflected in the adept 4 and 5 year olds who can operate the computer better than many adults and the teenagers whose adoption of mobile phones rivals the adoption of blue jeans by the youth culture in the 60s.

Where does Jamaica fit into this new world order techno village as globalization erases concessions once afforded island states to compete?

We continue to produce, as we must by definition of being Jamaicans, worldclass music and culture. We remain one of the top three producing giants of culture impacting on the global stage (along with US and UK).

We have the content the world wants...we can buy the technology.

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