Hearn, Greg and Ninan, Abraham and Rogers, Ian and Cunningham, Stuart and Luckman, Susan (2004) ‘From the Margins to the mainstream: Creating value in Queensland’s Music Industry’. *Media International Australia Incorporating Culture and Policy*(112):pp. 101-114.

From the margins to the mainstream: creating value in Queensland’s music industry

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Abstract

Like elsewhere, the music industry in Queensland is comprised of two tiers. The first tier is composed of products and services engaged by major music labels and commercially successful artists who at times attract significant sales. The second tier, or what is sometimes referred to as the ‘grassroots’ (Gibson, 2002), largely consists of independent musicians, production personnel and producers attracting both niche and at times mainstream audiences. Characterised by informally networked micro-economies, independent artists, niche markets and the exploitation of new technologies, the second tier is also of interest to cultural researchers who have tended to concentrate on sub-cultural music communities and music produced outside of the mass market first tier.

A mapping survey, which examined the Queensland music industry in terms of size, location, income and activity, is complemented by interviews with musicians, label owners, production personnel and others involved in the music “scene”. We explore how second tier practices (such as a reliance on social networking to achieve recordings and performance opportunities, as well as DIY culture and innovative business approaches) offer alternative methods for “doing music” and generating value in the creative industries.

Cultural analysis and the second tier

Most culturally focussed research on the music industry has examined ‘the margins’ via subcultural theory (Hebdige, 1991/1979; Hall and Jefferson, 1976; Willis, 1990). More recently, researchers have turned to dance music and the rave scene (Malbon, 1999; Redhead, Wynne and O’Connor, 1997; Thornton, 1995; Redhead, 1993), as well as record buying, genres, identities and the audience as fans, and the specific scenes they occupy (Frith, 1996; Straw, 1997 and 1991). Writing on punk and the Mods in particular (so named for their association with modern jazz), Hebdige identified two key ways in which ‘alternative’ cultural forms (part of the second tier) are supposedly co-opted by the ‘mainstream’ (the first tier). Firstly, and most pervasively in the music industry given the attitudes associated with ‘selling out’ to majors, subcultural signs (dress, music, etc.) are turned into mass-produced commodities - a process he labelled ‘diffusion’. Secondly, and this is evident in terms of how marketing spin can be used to render ‘safe’ and accessible previously peripheral music genres, there’s ‘de-fusion’: the co-option of deviant behaviour into the mainstream by dominant groups such as the police, the media and the judiciary.

While such ideas have lingered on and maintain a currency for promotion with some producers, they have been solidly critiqued over the years (Frith, 1981, 1988, 1991; Negus, 1992, 1996). McRobbie has been one of a number of cultural theorists to identify more complicated relationships which see the sectors of the second tier as something of a research and development wing of the first tier. As early as 1988, McRobbie called attention to the idea of the self-employed ‘subcultural entrepreneur’ as a response to the dwindling opportunities for full-time work and the trend to micro-economies apparent since the 1970s (1988: 31-36). ‘Enterprise subcultures’, she argued, have long been at the heart of subcultural practise despite attempts by both scholars and producers to maintain a mythic line that to exchange commodities is to ‘sell out’, even though they may well be involved in micro-economic exchange. Negus (1996: 43) also questions the ‘over-romanticised’ plight of the independent sector, noting that: ‘vast numbers of independent companies are making recordings not because of a commitment to an alternative cultural or political agenda [but] due to their commitment to the system and their own financial success within it’.

Writing more recently, McRobbie (2002: 519), examined ‘the entrepreneurial world’ of dance and club culture as a section of the music industry, and found young people in the industry today becoming ‘their own enterprise, sometimes presiding over two separate companies at once’. Increasing casualisation and a shift to contract-based relationships, she argues, is resulting in a decline in workplace democracy and its replacement by what she refers to as ‘network sociality’ (2002: 516). That is, increasingly less formalised, contingent and ephemeral working relationships are becoming the norm for a growing cohort of highly motivated freelance and self-employed creative workers. Such developments are not confined to the music industry, as Ouaj (1999) found in a European study which discovered increases in networks of independents and freelancers in the film and television industry as well.

In addition to identifying an entrepreneurially minded grassroots music industry, culturally-based analyses of raving and contemporary dance music have also considered how new digital technologies are changing cultural production (Hesmondhalgh: 1998). In particular, the DIY ethos of niche entrepreneurialism coupled with home-based computer technologies makes possible the production of quality recordings without the need of a studio. Thus in the face of arguments which call for the geographic clustering of a critical mass of music-related enterprises, digital recording technologies *prima facie* enable the de-centralisation of production. But as Gibson (2001: 247) notes in relation to production in regional Australia, there are limits to how much market penetration can be achieved without the 'seemingly inevitable' move to the core locations of production (being Sydney and Melbourne in Australia's case).

So while calling for caution in the face of what he sees as over-inflated claims about the possibilities afforded by new technologies, Gibson finds that if rural and regional producers are trying to break into the mainstream of the music industry, then DIY de-centralised production may not be the best path. But if one's aim is to exist through small niche networks, then new digital technologies are enabling a new layer of music production. Gibson (2002: 353) also found that with musicians in regional NSW, the operation of non-core music scenes are not 'completely separated … from the machinations of corporate capital in the music industry'. Brisbane, while not a regional location but nevertheless a non-core site of production, has witnessed second tier bands such George, Powderfinger and Resin Dogs make the step over from independent to mainstream. Discussion with second tier workers in Brisbane (Flew, Ching, Stafford and Tacchi: 2001) suggest that Gibson's conclusions are correct insofar that a number of artists and bands are content to build up their network and audience through niche markets. But many artists are also seeking to engage with the mainstream and see their development through the local second tier as a reasonable progression – rather than the earlier pattern of relocation to Sydney or Melbourne as soon as possible. In spite of reductions in live performance venues (Flew *et al*, 2001; Homan, 2003) and the concomitant difficulties this raises for aspiring bands in achieving audience awareness and promotional opportunities, the second tier in Queensland nonetheless creates value, albeit at modest levels in comparison with first tier, through networking and instances of creative entrepreneurialism.

In examining how value is added along a product's production and distribution path, it can be seen that second tier music and unsigned popular artists (those not aligned with a major record company) are increasingly able to sell their work, independent of the traditional value chain, due to technological and cultural change factors. To place a record in the mainstream marketplace, a first tier recording company will oversee a number of agents and organisations such as recording studios, manufacturing plants, distribution outlets and graphic design companies in addition to marketing. In addition, there are a number of sub-sectors in creating value which are associated with both tiers, though obviously in ways that are related to their scale. Such sectors include merchandising that incorporates name or likeness (Lathrop and Pettigrew, 1999) as well a number of other creative industries such as broadcast radio, television, journalism, advertising, film, video, software and computer services[1]. We suggest that the creation of value in the music industry includes both mainstream practices as well as innovations in style, content, technology and business models operating in the second tier. To some degree, this supports Negus' (1996, 1992) notion, that an antagonistic binary of the 'mass-market' major labels versus the 'artistic' independent sector is questionable. Rather, he suggests a 'web of major and minor companies', variously connected by complex and 'obscured relationships' (Negus, 1996: 44). Hesmondhalgh (1998: 246), writing about the relationship between major and independent labels in the dance and rave scene, notes how 'the majors have worked to assimilate as rapidly as possible resonances attached to independent record companies'. Pre-empting our findings, two independent label owners of a middle and large sized firm expressed similar views, with one stating:

[1] The publishing royalties from mobile phone ringtones for example was estimated to be worth $US1 billion worldwide in 2003 and the profits gleaned from ringtone sales in Europe has now approached and in many cases overtaken profits for music CD singles (Emling, 2004; BBC, 2003).

> It's exciting that major record companies are being redefined and reformed. While there is always a place for large infrastructures, their power is condensing while the independent labels are developing more quickly and producing more music than they ever did before.

In light of such cultural and technological changes to the music "scene", the primary aim of this study was to examine in detail how value creation works in Queensland, in terms of the relationship between the 1st and 2nd tier. Queensland is of interest as it has experienced recent successes with tier 2 acts moving to tier 1, suggesting it is a region where tier 2 industry is vibrant and relationships to tier 1 might be evident. Currently compared to elsewhere in Australia, Queensland generates a significantly higher number of start-up independent label companies (QMusic, 2004). As well, Queensland, is an exemplar of a non-core regional music industry, and studies of such centres are needed to achieve an inclusive picture of Australia's music industry. To date, studies of non-core regions have not been conducted.

Methodology

This analysis draws on evidence from two studies. A mapping survey involved administering 357 questionnaire surveys was followed by a more in depth qualitative study based on 20 interviews. The full details of this intensive work are reported in Cunningham, Hartley, Hearn, Radbourne, Ninan, Cox and Roodhouse, 2004; Rogers, Ninan, Hearn, Cunningham, Hartley and Radbourne, 2004 and Ninan, Hearn, Cunningham, Hartley and Radbourne, 2004. The survey sample was a stratified quota sample of 36 categories of music industry activity in Queensland, drawn from the Australia On Disc (n=10,086) supplemented where necessary by industry derived referrals. The 36 categories were developed in consultation with Queensland's music industry advocate, QMusic. This categorization has been rigorously mapped to standard classifications (ACLC and ANZSIC)[2] and represents a robust and exhaustive description of music industry activities (for a detailed presentation of this mapping, see Cunningham, Hartley, Hearn, Radbourne, Ninan, Cox and Roodhouse, 2004). The survey sample can fairly be claimed as the first

[2] ACLC: Australian Culture and Leisure Classifications; ANZIC: Australian and New Zealand Standard Industry Classification.

rigorously defined and collected representative sample of music industry business in Australia.

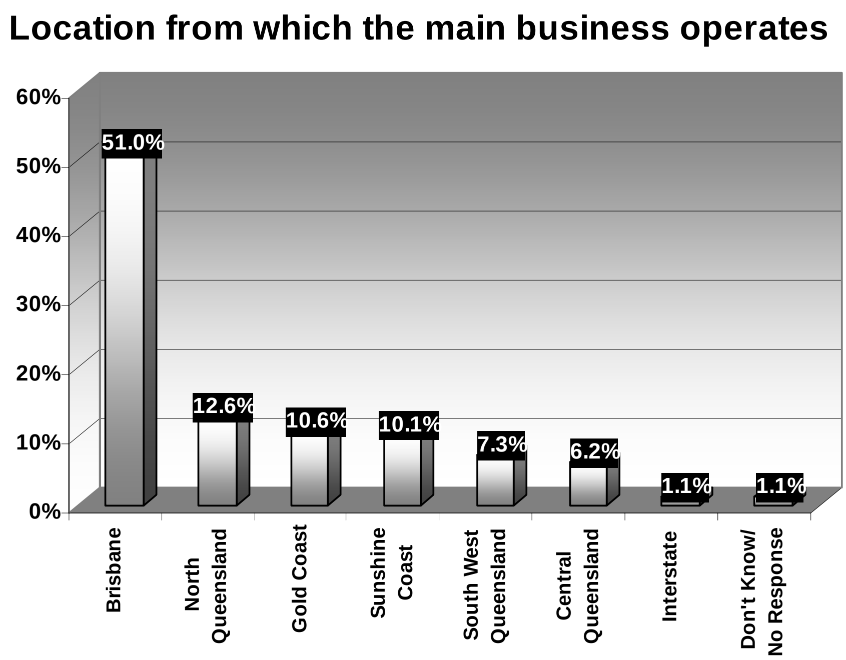
The sample thus covers the following broad sectors: music publishing, record companies and distributors, music retailing, other performing arts/music and theatre productions, music composition and music performance. The interview sample was derived by engaging an industry insider, who conducted in depth interviews from within his network of industry contacts, as well as via referrals across key categories of music activity.

While the aim of the quantitative survey was to provide a robust description of the size, location and characteristics, current problems and interdependencies of firms in the Queensland music industry, the aim of the interviews was to understand and *exemplify* the creation of value in detail. In particular, the interviews examine the working relationships in the context of technological innovation in the second tier.

Preliminary description of Queensland's music industry

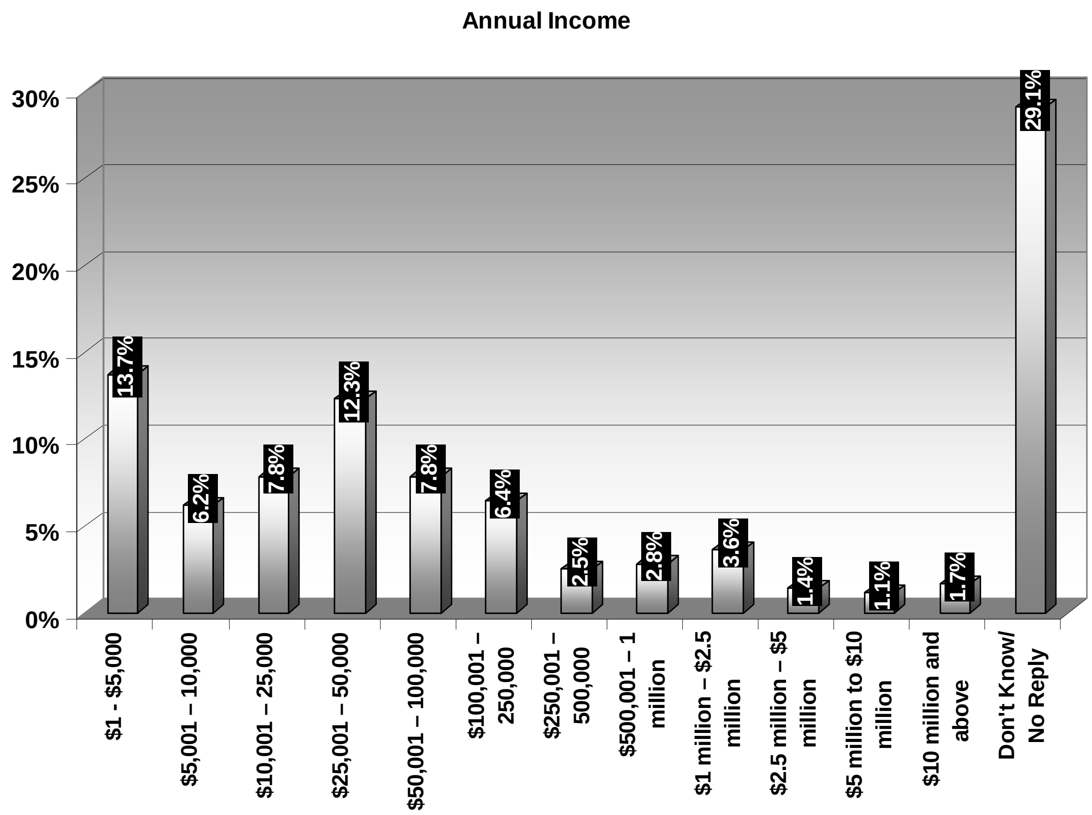
Location data (Figure 1) indicates spatial clustering of almost three-fourths of the industry in South East Queensland, with a small percentage of firms in the South West (7.3%) and Northern Queensland (12.6%).

Figure 1



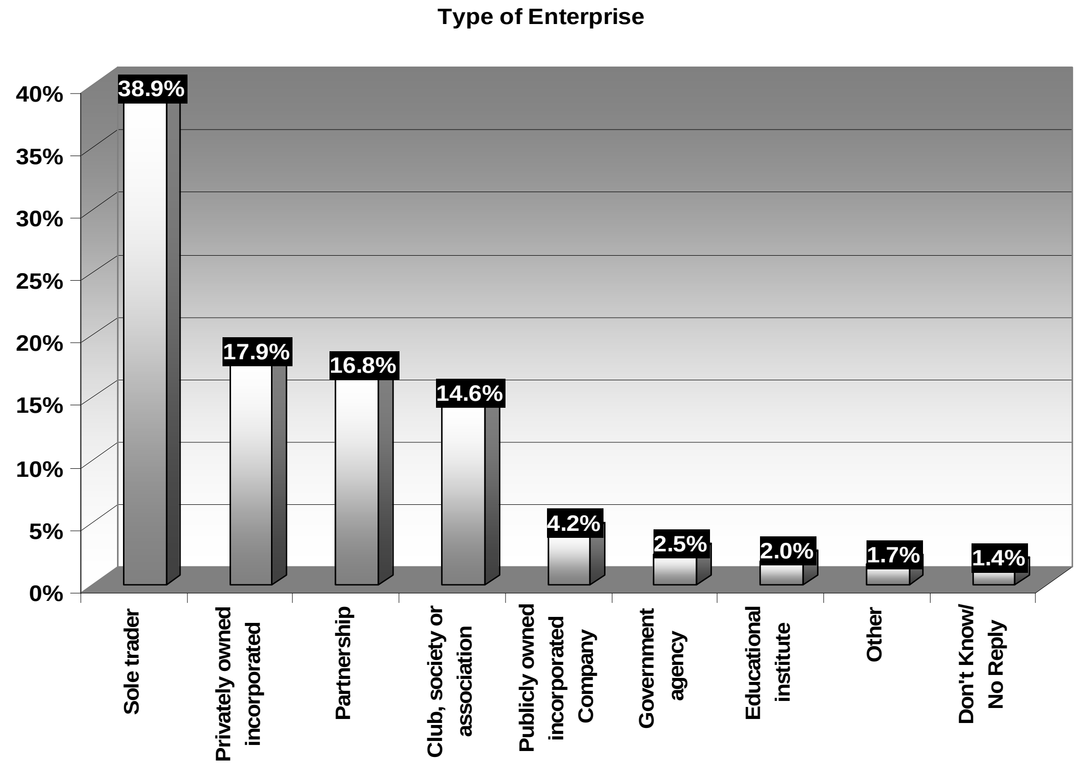
The survey results indicated that co-location benefits are: 1) sharing of information and experience; 2) learning new information or knowledge; 3) sharing of skills; 4) learning new skills and 5) sharing of personnel. Such networking activities help bolster the position of the collaborating firms in the wider market, with an aim to increase their competitive advantage and market share.

Figure 2



Most of the reported gross incomes for the industry (Figure 2) are less than A$25,000 per annum: few (6.1%) earn more than A$1 million annually. The most likely reason for such moderate incomes is that a majority of those surveyed (approx. 90%) are micro or small organizations, being one or more of the following: a musician, band, DJ, or being involved with live or recorded music (Figure 3). Most music enterprises (including sole traders) engage in a multiple of activities though the majority (69.0%) of respondents reported that their primary activities involved the production of music through recording and performing. This pattern was elaborated in the qualitative study.

Figure 3



For example, during the course of the study we interviewed producers who worked as bar staff in venues, maintained key roles in community radio, studied full-time, worked in web design, operated rehearsal spaces and manufactured and sold instruments. Very few respondents worked in completely unrelated fields. A cursory scan of the personal networks of respondents also indicates a bias towards private association with individuals located elsewhere within the scene. Many workers, particularly those struggling financially while performing more ancillary type functions maintain their operations under the belief that in the medium-term their work will provide a financial return and have a wider cultural impact on those around them. These results are similar to those found in Gibson's (2002) research in the northern NSW region, where the majority of employment was of an 'informal' and 'itinerant' nature.

The importance of being part of a network and gaining access to the network was often emphasised by aspirant musicians and those more established. As Olson (1998: 255) illustrates:

> The many little worlds of popular music are not mere microcosms of mass-mediated rock, but neither are they distinct, autonomous zones of authenticity. Grafting the full spectrum of rock practices onto the continuum of success allows the rock analyst to avoid setting rock up in terms of the weary art-versus-commodity binary.

It is this ‘continuum of success’ which we wish to analyse here as well as shedding light on the way the first and second tier relate in Queensland.

Discussion

Major labels (Sony, EMI, BMG, Warner Music and Universal) are traditionally the domain of professional musicians contracted to large recording companies and generally surrounded by a more bureaucratically organised ancillary workforce. The global recording companies have organisational arrangements resembling most bureaucratic businesses, requiring structures of management across financial, human resources and marketing (Davis and Scase, 2000). As a consequence, the first tier most nearly resembles the linear value chain, optimised to market products to consumers. It is by and large supply driven due to the nature of the production process. While the attrition rate for major affiliate singers and bands has at times reached levels as high as 90% after the production and release of a debut recording (Spellman, 1999), successful bands such as Powderfinger are clearly afforded greater exposure and sales than would be possible in the independent, second tier.

Some independent performers expressed concerns about first tier organisations exploiting emerging talent. However this can also be viewed along the lines of what McRobbie above called a ‘research and development’ function by the majors. An experienced promotions manager with prominent independent distributor MGM (Metropolitan Groove Merchant) in Brisbane, observed how major labels have essentially replaced their R&D function with a model that instead of developing talent, farms it from the independent sphere, administered through independent distributors. This need not be interpreted as a negative development for the second tier. If such synergies can be improved upon, then opportunities for independent artists may actually increase. The argument that bands go to Sydney and Melbourne (to further their national and international markets) is a creative-drain on non-core locations, is reminiscent of debates around Australian actors, directors and cinematographers 'deserting' Australia for Hollywood. The success of local artists, who move to larger production centres need not be perceived as detrimental for non-core locations. Gibson and Connell (2003: 166) point out the importance of links between 'artists, bands or whole "scenes"' and that these associations can 'create patterns of demand that translate into new local cultural economies':

> A focus up here, because of the support and because of the isolation, is about building a sustainable indie' career without necessarily wanting to be signed [to a major] as the be all and end all (Jo Bell of online music directory Brispop.com).

With improved awareness and business training through support and information within the music sector at local non-core sites, interaction between first tier organisations and independent performers may animate the sort of continuum of success mentioned above, and be a more useful model than the binary of first and second tier alone. A managing director of a national independent label, views the majors as 'creators of desire on a large scale', while the industry's grassroots indicate 'where the vibe is and where it is going to be'. For independent practice, the key motivators are brand building and audience development. Despite what often appears to be politically motivated behaviour, the producers in the independent sphere are not opposed to the exploitation of their work for profit and many expressed a desire to achieve first tier success. Other less commercially motivated performers view the second tier as an informal framework for production, performance and distribution and a possible means to profit from their work.

Judging from comments made by second tier musicians, independent artists do not act entirely without a profit impetus or reject involvement in the first tier industry. Ultimately, independent workers strive towards a degree of profitability like those located in the commercial sphere. What differentiates the two, first and foremost, is scale. Members of the independent scene share a belief that the short-to-medium term future for local popular music, in Brisbane in particular, will experience a period of growth. This belief is largely based on the recent success of independent Brisbane bands such as Dollarbar and The Grates in gaining Triple J airplay (largely the result of affordable production)[3], and the arrival of a number of key independent record labels like Rhythm Ace and Valve, combined with the re-establishment of southern touring networks. The freelance and DIY culture of the second tier, while historically most apparent for emergent popular music artists and niche music markets (such as dance and rave), seems to be creating a conduit for artists accessing larger markets, independent labels and the possibility of gaining mainstream exposure.

At the second tier the production process reflects a leaner mode of production. The performer is more often self-managed or is a heavily involved director of the management process. Record labels are typically micro-to-medium businesses occasionally operated by the artists themselves. This reflects state-wide figures for all music businesses, which illustrated that 86% of firms are micro-businesses, employing 0.5 full time staff. Products are brought to market via networked project teams utilising shared knowledge and resource pooling. This networked nature of the second tier can also be seen from data which shows that 75% of enterprises are engaged in related multiple activities – up to three and four in number. An example of such networking and management style is provided by the band Autumn Giants, who are preparing their first national release.

After a number of years spent refining their music in Toowoomba (100 kms west of Brisbane), the band ventured to Brisbane to record a demonstration recording with Michael Squire at Headspace Studios (a rehearsal space with rudimentary recording facilities). Squire liked the finished product and passed

[3] It is possible to achieve a broadcast quality recording in a home based studio for 20 to 30 dollars per hour.

the recording on to an employee, Nicola Phoenix, who then played it for her band, Iron On. The band liked the recording and decided to contact The Autumn Giants to play alongside them in Brisbane and Toowoomba (with each band booking the shows in their respective towns). After meeting and playing together, the two bands felt they had much in common and continued to play shows with one another.

In late 2003, The Autumn Giants had written enough material to record an EP and a member from Iron On subsequently offered to release an Autumn Giants recording on her Independent label, Ruth Street Records. The recording was made in a small studio, which came recommended from friends. Ruth Street Records organised the EP's release through independent distributor MGM (a successful agreement was made in part because of Iron On's prior involvement with the company) and out-sourced the preparation of the album's artwork to a couple who play in local band Turnpike but work as a commercial printer and photographer. The subsequent album is due for release in August 2004. This Do-It-Yourself culture plays a large role in community infrastructure in the independent music sector. The managing director of one of Australia's foremost independent labels expressed the view that mainstream labels are being redefined though changes brought about by second tier practices. While large infrastructures have their place, he believed independent labels are responding more quickly to audience demand and producing more music.

Thus we found that the 'digital revolution' has influenced the Queensland music industry as it has everywhere. The advent of superior and affordable digital recording equipment has, according to many in the second tier, seen a marked rise in the practice of home recording. Indeed, 50% of all businesses surveyed were operated from home. This has consequently influenced both recording processes and culture. Independent artists in particular, who have been active home-recording enthusiasts since domestic multi-track tape recorders became widely available in the 1980s, have turned to home recording as a viable DIY alternative to established studios.

First tier artists utilise the commercial studio environment to make recordings but limited numbers of Queensland signings mean the studio industry would struggle to subsist on this type of work alone. In the field of electronic music production in particular, high quality, first tier recordings are often produced in private home studios. A number of second tier popular music artists utilise lower-end more affordable studio operations to make recordings (such as The Autumn Giants above), but often do so during later stages of their development. This turn to DIY recording however is not solely related to achieving a demo or first EP. An independent label owner made the point that there is little use in touring without product to promote. This relates not only to sales at shows and concerts (which can become profit-making activities in themselves), but is also important for publicity purposes and acting as a 'calling card' for talent spotters. Bands in particular are also able to improve the quality of live performances with better preparation through time spent in recording and in some instances, complimenting the live sound with recorded material. However, the health of the high-end recording sector is not entirely determined by such increases in home recording. Music is increasingly becoming a visual medium (Price Waterhouse Coopers, 2003) and Queensland recording studios are quickly becoming one-stop production houses, able to meet a variety of differing customer demands.

An example of a studio broadening its product line is Nasty Studios in the Brisbane suburb of West End. This facility records broadcast quality audio recordings, demonstration recordings and live recordings. The company also produce video material (from training videos to music clips), creates custom animations, assembles web pages and has an art and design division suited to promotional needs. An example of a successful home studio business is Black Box Recorders, a mobile recording studio set up by two Brisbane sound engineers. George's first album, recorded using this facility, achieved number one ranking on the ARIA charts. George formed in the mid-1990s and played around Brisbane gathering a fan base from live shows. From there they released three independent EPs and eventually signed with Festival Mushroom in 2001. In 2002, after George's first full-length album debuted at No. 1 on the ARIA charts, the band's work was added to the play lists of commercial radio stations. The frequency of such activity and its application within the mainstream industry suggests that previous assumptions about the 'quality' of DIY recordings and the second tier are becoming less of a barrier:

> I can remember listening to the Demo Show on Triple Zed [Brisbane community radio station] eight years ago and everything that came out locally was shit, almost unlistenable … Now I can't tell the difference between the latest Geffen release [US major] and the latest Dollarbar release [Brisbane band] (Adam King of Brisbane independent band Turnpike)[4].

It could then be said that recent technological and cultural shifts have given new entrants direct access to consumer and niche markets. There is also a greater willingness on the part of the first tier to work with second tier operations, who are being increasingly seen as 'serious players'. For example, Metropolitan Groove Merchant (MGM) Distribution – exemplify a *supply sensitive distribution*. Started in the late 1990s, MGM distribution has since become one of Australia's leading music businesses. The organisation (a retail distributor of finished records) is currently managed by Sebastian Chase, an experienced band manager (Dragon, The Reels & Rose Tattoo) and label owner (Rooart and Phantom Records).

At present, MGM Distribution is the single most accessible and supportive distributor of Queensland music in Australia. MGM Distribution is one of the only gateways to interstate and local markets for many Queensland acts. While the distribution model utilised by MGM is an established one involving the selling of music products to stores via administered consignments, the business is an encouraging signifier for Queensland music. The recent success of high profile acts like The Whitlams and The Waifs while still releasing independently and being distributed by MGM has placed the company into the first tier. It may not be able to match the scale-based operations of the major recording labels but MGM has developed a reputation

[4] Concurrently, diminishing opportunities for local and emerging talent to gain mainstream media coverage or the perception by industry workers that this is the case compared to earlier years, suggests the focus on networking and DIY culture at the second tier of popular music is also the result of limited opportunities for mainstream media exposure.

not incommensurate with those organisations. Bands, with the right management and material, can now access markets traditionally controlled by the first tier through the distributor.

A key to MGM's success is that they have invested resources in artist development. While not pursuing overly speculative opportunities, the company does foster independent music and offers its associated acts full creative control. Unlike first tier recording companies who rely on a relatively small number of highly successful performers, MGM derives its revenue from a larger number of diversified names. With performers becoming more aware of the business environment surrounding their work, independent organisations that are able to offer creative control and/or more itemised services should continue to attract successful acts.

Another example of an innovative approach which derives in part from new technologies is Lawrence English and his Room 40 Records business. Room 40s is an example of *demand sensitive production*. English currently performs as a collaborative, experimental artist both solo and with a number of ensembles (I/O, Ubique Trio and Object). In addition, he works as a part-time music journalist, as well as running Room 40 Records, an small imprint business. English's work is innovative for two reasons. Firstly, while his music and associated consumer/producer community is strongly collaborative in nature, his own production model is mostly autonomous. Secondly, the consumer base for his work is global, yet still informally networked

Lawrence's working environment is one wholly shaped by the digital era. The emergence of online communication (email and file-transfer in particular) has broadened the scope of his audience and producer community to such a degree that global markets are now accessible. One of the recurring themes in interviews was that access to international markets – even for independent popular artists – was a major factor in assuring sustainability for the second tier at non-core locations. The capacity to carry out music production, communication and business organization on a laptop has also reduced much of Lawrence's sector involvement. A parred-back aesthetic found in his music, and in its creation, is also evident in Room 40's minimalist record packaging. An open-minded approach to performance practice sees his music performed in a range of music venues and art galleries. He also collaborates with visual artists and other creatives, possibly broadening his label's market exposure with audiences.

The crux of this model is that it virtually reverses the existing music value chain. Where traditional music practise is supply driven in nature and governed by a desire to strengthen and standardise the supply chain, English succeeds by identifying a consumer base and working back to the artist, via tailored products.

Conclusion

Queensland, like other non-core locations, has predominantly found itself placed within the second tier, one presently populated by independents, emerging music industry workers and sub-cultural groups. The second tier is both researcher and developer. In a transitional era, the stigma of second tier cultural production has largely been removed and opportunities for financial gain are increasingly opening up. DIY technology has reduced the gap between the production capacities of independent artists and labels with that of the major labels. Technology makes it easier for new, emerging, independent artists and bands to record their demos at lower costs in home studios and prepare for live shows. The skill and resource sharing amongst the second tier creates informal ties and networks, which to a degree, help sustain it. New technologies and possibilities for media distribution have in a sense, upset the more traditional distribution methods of the first tier. The advent of DIY technology and culture gives musicians the choice to consider developing national or international niche markets using alternative business models to those used by the first tier. Alternatively, they can hone performance skills and produce a quality EP that may gain market attention from independent or first tier labels. However the informal nature of such networks, while advantageous in respect of affordability and flexibility, also translate to a lack of shared strategy, which may impede interaction with the first tier on the 'continuum of success'.

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Published as:

Hearn, Greg and Ninan, Abraham and Rogers, Ian and Cunningham, Stuart and Luckman, Susan (2004) 'From the Margins to the mainstream: Creating value in Queensland's Music Industry'. *Media International Australia Incorporating Culture and Policy*(112):pp. 101-114.