

Between the Long Tail and the Blockbusters: Transformations in the Brazilian Radio Music Market

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Abstract

*In the present article, we aim to detect trends in the Brazilian radio music market, considering the relevance of musical programming. For this, we confront the visions exposed by Chris Anderson (2006) and Anita Elberse (2014) in their books *The Long Tail and Blockbusters*, analyzing market information and recent surveys and cases observed in broadcasters from different Brazilian states. Performing a qualitative document analysis, we could identify the insights presented in most recent published materials and evaluate the trends detected. We can note that music is, and probably will always be, a noble part of the radio, but broadcasting cannot lose sight of its essential truth, which surpasses playing music – it involves endorsing relationships among people, and also between people and businesses.*

Keywords: Radio. Music. Broadcasting. Long Tail. Blockbusters.

1 Introduction

The virtually unlimited universe of information and entertainment brings down paradigms, habits and barriers, composing a critical scenario for traditional media in present times. The radio, known centennial media, appears as one of the prime targets of the most pessimistic forecasts, even while preserving high relevance and penetration, especially in Brazil, where 89% of the population still listen to radio on a daily basis (Kantar Ibope Media, 2015). Music is a primordial element of all content offered by the almost 10,000 existing broadcasters in Brazil. What was once strongly controlled in terms of reproduction, today is available with great ease and high possibility of customization. This affects not only the business of record labels – which used to have great power in the market –, but also radio stations, with whom they maintained a close commercial relationship.

Among the various theories that explain this environment full of transformations in which the media and entertainment market is highlighted, two stand out: the long tail, which points to a future dominance of the niches (Anderson, 2006), and the blockbusters theory (Elberse, 2014), which advocates that businesses based on blockbuster products is the more effective path to long-term success. Each of these theories impacts, in its way, the radio industry focused on music, which represents the vast majority of programs available for free.

In this sense, in this article we aim to discuss the possible directions of musical radio in the light of the similarities and differences between the Long Tail Theory, formulated by Chris Anderson (2006), and the Blockbusters Theory, by Anita Elberse (2014).

Through bibliographical and documentary research, we seek to extract the visions these authors have of music and radio, and, analyzing market data, estimate which of these theories will prevail in Brazil, regarding the radio medium. The issues raised in this paper are illustrated by examples of actions that have already been performed by Brazilian musical stations that try to adapt their strategies to the new trends.

2 Theoretical framework

2.1 The long tail

The concept of long tail was launched by Chris Anderson in October, 2004, and deepened in book form in 2006. Anderson, then editor-in-chief of Wired magazine, had been interested in investigating whether paradigms embodied in traditional markets were also valid for so-called "new economy" companies, especially those with strong digital performance. In raising the sales numbers of the items offered by giants such as Amazon, Netflix – still exclusively based on DVD rentals – and Apple's iTunes, the author noted the vast majority of items offered by them generated very few deals individually. The phenomenon seemed even more evident to Anderson when these data took the form of graphs. Considering the "x" axis for product portfolio and "y" for popularity, the curve began high, but quickly descended and became a continuous line, such as a "long tail". According to Anderson (2006), this was the opposite of the belief, inspired by Pareto Principle, that 80% of sales would be generated by 20% of the businesses, since the sum of small sales would generate relevant results and, in the future, could surpass the greatest hits.

For Anderson (2006), the appearance of the long tail is conditioned by the reduction of the costs to reach the niches, which, in turn, drives three forces: (1) the democratization of production tools; (2) the democratization of distribution; and (3) the connection between supply and demand in a more facilitated way. From this, a productive chain is formed, composed of: (a) content producers; (b) aggregators, whether hybrid digital or pure; and (c) filters, which aim to recommend and classify the aggregated contents. In this scenario, the public, endowed with an enormous power of decision, plays a triple role: the consumer, the content producer – or prosumer, word coined by Toffler (1980) – and the filter, influencing, through criticism and recommendations, other consumers buying decisions. At the time of its launch, the long tail concept was widely revered by great agents of the digital world. Still in this mood of euphoria, Anderson (2009) wrote the book "Free: The Future of a Radical Price", in which indicates the "freemium" – a word that represents the combined offer of free products or services with others, paid – as the ideal way to generate business in a world that, as he believed, would be dominated by niches.

Both in Long Tail (2006) and Free (2009), cases occurred in music industry – defined by Anderson (2010, p. 99) as the "ground zero of the long tail explosion" – were extensively used by the author as an effort to prove his theory. "The music itself did not fall into disfavor – quite the contrary. There have never been better times for artists and fans. The Internet has become the favorite vehicle for listening to music. What fell out of favor was the traditional marketing model of selling and distributing music. The music production and distribution system, which has reached gigantic proportions based on the radio and television hits makers, spawned a business model dependent on monumental hits – and presently there is no such thing as a blockbuster. We are witnessing the end of an era". (Anderson, 2006, p.35)

Time would challenge the tenacity of Anderson's (2006) thesis, when, for example, Facebook was only a few months old and still far from revolutionizing the way people around the world communicate and consume content. Some market references used by the author in his first book would radically change, such as Napster and Netflix, while others would simply disappear, such as Ecast. At the same time, traditional players in the media and entertainment markets maintained their leading positions and the hits were not suffocated by the profusion of niches. This reality allowed for more powerful contestations to the long tail soon to be formulated.

2.2 Blockbusters

In 2014, exactly ten years after the launch of the long-tail concept in Wired magazine, Anita Elberse, a professor at Harvard Business School, launched the book "Blockbusters", which tracks in the opposite direction to Anderson's. While Anderson points to a break from the dominant model in the global entertainment industry, Elberse (2014) defends the maintenance of great successes and states that new technologies and the profusion of niches would only reinforce the prevalence of hits. In her words:

“Fortunately for those who bet on successes rather than niches, real data on how markets are evolving tell a very different reality from what Anderson predicted. As demand changes, from physical resellers with limited shelf space to online channels with much more variety, the sales distribution is not growing in the tail.

On the contrary, as consumers buy more products online, the tail is not lengthening, but getting thinner. The importance of individual bestsellers is not decreasing over time, but, differently, increasing” (Elberse, 2014, p. 163). Elberse defends the "idea that large producers invest disproportionate amounts of their budgets in works that can be a great success, thus making huge bets" (Elberse *apud* Capelas, 2014). While acknowledging the high risk of this type of strategy, the author believes it is much more effective than betting on the sum of countless niches, as Anderson does.

As a synthesis of this theory, Elberse (2014) uses the phrase "the winner takes all", popularized by the economists Robert Frank and Philip Cook, or, in other words, "the best gain a disproportionate share of the market" (Elberse, 2014, p.90). There are few common issues between the theoretical defenses made by Anderson (2006) and Elberse (2014). One of the only similarities is the choice made by both of them to use case studies as their primary method of validating their thoughts. When analyzing the digital music trade in 2011, for example, Elberse (2014) emphasizes the high concentration in sales. "It's amazing to see how few successful titles contribute to a significant share of sales and how many with poor performance cannot do the same. This is the reality of digital markets. Variety can expand more and more, but the importance of few titles that sell well continues to increase, while average sales for the less-selling hits are falling" (Elberse, 2014, p. 164).

Despite so much antagonism, it is important to emphasize that Elberse (2014) incorporates, punctually, the long tail to her theory, by pointing it as the final destination of the past hits, expanding their life cycle. "It is clear that long tail products do not only include the true niches, but the old successes also. [...] For old successes, therefore, digital channels may present a real opportunity. But the vast majority of the products in the tail was not very successful" (Elberse, 2014, pp. 165-166). In other words: in Elberse's opinion, blockbusters would prevail even in the long tail. The next section will explore and discuss Anderson's point of view compared with Elberse's,

2.3 The musical radio according to Anderson and Elberse

Both books – *The Long Tail* (2006) and *Blockbusters* (2014) – cite the radio and its characteristics, although the first one does so in much greater intensity than the second: the word "radio" is mentioned 29 times by Anderson (2006) and only 6 by Elberse (2014). In both books, most of these mentions arise when dealing with developments of the music industry. While extolling the past of radio, which he defines as the creator of a "common national culture" (Anderson, 2006, p.27) and popular idols (Anderson, 2006, p.28), Anderson describes an uncertain present reality and foresees a bleak future for the environment, especially in the musical segment.

"The problems of the music industry are not limited to the sale of CDs. Rock radio programs, long-time favorite record label marketers, are facing the same hardships. [...] In 2005, a rock radio went out of the market, on average, every week. These broadcasters often changed to talk shows or Latino-oriented shows that are more 'sticky' (hold the audience's attention for longer) than the rock and pop musical styles, that hold the audience only while mainstream songs are playing". (Anderson, 2006, p.33).

As causes for this phenomenon - which, in Anderson's interpretation, is reflected in the reduction of the average time that listeners dedicate to the radio medium –, the author mentions five hypotheses: (1) the rise of the iPod; (2) the mobile phone; (3) the change, in 1996, of US communications legislation, which opened a thousand new FM radios and weakened existing stations; (4) high market concentration by ClearChannel, (today, iHeartMedia); and (5) the campaign against obscenity captained by the Federal Communications Commission (FCC) (Anderson, 2006, pp. 33-34). In a natural sequence of his contention about the mastery of successes in the entertainment world, Anderson (2006, p.34) questions the permanence of the radio as a musical hits creator. Elberse (2014), on the other hand, extends further on only one of the six times she mentions the radio in her book. This happens when she details the strategy of launching "Just Dance", Lady Gaga's first single.

"To succeed with the song was difficult: 'We could not get it to play on pop radios', Carter [Troy Carter, Lady Gaga's manager] recalls. 'Mainstream radio stations told us it was too much of a dance song for them'. Bobby Campbell, CMO (Chief Marketing Officer) at Atom Factory, Carter's artists management company, said: 'Dance music did not play on the radios that focused on the '40 most wanted'. Radios refused to play dance music" (Elberse, 2014, p. 62). While it serves as an example of the importance of radio for the executives of the musical market, this situation illustrates the limitations programmers can impose on the emergence of new artists.

After the transcript above, the author, in her narrative, indicates the resistance found in the stations forced those responsible for the career of Lady Gaga to execute an alternative strategy, initially addressed to the gay community and then prioritizing social networks (Elberse, 2014, pp. 62-65).

Both Anderson (2006) and Elberse (2014) expose in their works the critical views they have of the radio: the former questions the survival of this medium as a trend dictator and success-maker; the second notes the limitations the radio can reveal when trying to be inserted in the strategy of launching a blockbuster.

2.4 The Brazilian music radio market

As seen in the previous item, Anderson (2006) and Elberse (2014) understand radio in symbiosis with music. When analyzing market data, one can see why. In the United States, 18 of the 21 most-listened radio programming formats in 2015 were musical (Nielsen, 2016). In Brazil, according to Kantar Ibope Media (2015), musical programming, regardless of the styles performed, dominates the audience rankings of the three largest markets in the country: among the ten most listened, eight were musicals in Rio de Janeiro, and nine in São Paulo and Belo Horizonte.

The dominance of music is also great in terms of supply, especially in FM: 84% of all FM stations in the metropolitan areas of Belo Horizonte, Rio de Janeiro and São Paulo have mostly musical programming. These schedules follow different formats, each based on the most requested musical styles. Unlike the United States, where there are dozens of formats and sub-formats (Keith, 2010), Brazil has four preferred music styles:

- Popular, based on massive successes, such as *pagode* and *sertanejo* rhythms;
- Young, which focuses on international pop songs and is preferred by the richest listeners, called “A and B classes”;
- Contemporary adult, with soft songs, whether national or international, and many flashbacks;
- Religious music, which have been increasing in the last few years.

It is important to emphasize certain peculiarities that prevent the exposure of a more precise perspective of the Brazilian radio. In the first place, it is a strong local market, especially in the popular segment, reflecting the preferences of each region. In this sense, there are few musical networks with coverage in more than one geographic region. In addition, very rare broadcasters disclose their financial results. All of these aspects make it impossible to identify the leading national music broadcasters and define the profile of the average musical radio consumer in Brazil.

Besides the issues related to the supply and consumption of music through the dial, there is another fundamental aspect in the connection between the radio and the music: the historic, close and pecuniary relationship between broadcasters and record companies. They are what Kischinhevsky (2011) calls the “musical radio production chain”, which also involves other links, such as local artists, producers and entrepreneurs. Here, radio stations play the role of spreading certain songs, making it commercially successful, “engaging public interest” (Kischinhevsky, 2011, p.250).

3. Methodology

This is a qualitative and exploratory research (Gil, 2015). We adopted bibliographic research as a fundamental method for the analyses presented. It involved the collection of content already published in books, journals and websites, for later evaluation. For the evaluation of the collected data, we adapted the qualitative approach of document analysis, developed by Bowen (2009). In this approach, data found in the documents must be examined to present a meaningful context, favoring understanding, and to develop pragmatic knowledge. The process consists in analyzing documents through skimming (which refers to a superficial evaluation), reading (detailed examination), and interpretation (Bowen, 2009).

The main documents considered were the books by Anderson (2006) and Elberse (2014), which were compared – in terms of contents regarding the radio reality and its trends – and used in “socially organized ways”, according to Atkinson and Coffey (1997, p.47). Therefore, we established the meaning of each text assessed and its contribution to the issues under investigation.

4. Discussion

While the theories espouse diametrically distinct business models, the origin of the Long Tail Theory and the Blockbusters Theory is the same: the new possibilities for production, distribution, communication, and consumption of media and entertainment created by digital technologies. For Anderson (2006), this would greatly increase the supply of contents that, even generating few individual businesses, could, in the future, overcome the great popular successes if offered together, thus justifying the relevance of the aggregators. In contrast, for Elberse (2014), the digital would not become a threat to the dominance of the blockbusters; on the contrary, it would expand the economy of scale of these products by facilitating their distribution in global terms, as well as offering powerful tools for the dissemination and loyalty of their consumers through social networks, for example.

Although backed by evidence from market data analysis, it is important to note that Anderson's (2006) thesis is presented as a promise for the future: that someday the niches would overcome the big hits – although the author was unable to tell precisely when that would happen. Elberse's (2014) counterpoint arises precisely from the vacuum left by the questioning whether or not Anderson's pledge has been fulfilled, since several figures presented by Elberse still indicate a strong concentration of commercial results on blockbusters, even ten years after the emergence of the concept of the long tail. One of the strongest data in this sense came precisely from the musical market: in iTunes, only 102 songs, or 0.000013% of the catalog, were responsible for 15% of sales in 2011, while the combination of almost 6 million songs, each with less than 10 copies sold, accounted for only 1% of revenue (Elberse, 2014, p.164).

Although the confrontation of these theories suggests that one can annihilate the other, we observe, in fact, the coexistence and complementarity of the two models. This is evident, for example, when Anderson (2006) reinforces the immense variety of products as competitive differential of companies like Amazon and iTunes, combining great successes with infinite niches, and when Elberse (2014) indicates that the natural destiny of blockbusters of the past is to become part of the long tail.

However, both the scenario of cohabitation of the long tail with blockbusters and the possible extermination of one of these models by the other impact on the dynamics of the music market and, consequently, on the radio. As Herschmann and Kischinhevsky (2011) point out, record companies have sought to reconfigure their business models, no longer depending almost exclusively on the sale of physical media, such as CDs and DVDs, and targeting diversification by, for instance, live events and digital businesses.

In such a scenario, where phonograms lose prominence, music broadcasters tend to be less important within the record companies' business strategies, and this appears clearly both in Anderson's and Elberse's theories (see section 2.3). Elberse, citing the case of Lady Gaga's release, shed light on a fragile programming policy for US music broadcasters. If there was still no evidence that such a phenomenon was taking place when Kischinhevsky dealt with it in an article in 2011, it is now possible to observe some specific examples of important broadcasters from different regions, profoundly altering their schedules, seeking alternatives to changes in the listener's behavior. Tutinha Carvalho, president of Brazilian radio broadcast Jovem Pan and one of the most incisive advocates of these changes, points out that the path to renewal of musical stations is precisely to leave music aside and expand the space dedicated to spoken contents.

"The success of radio depended heavily on releasing the song first. Today this no longer exists. Everything is already on Youtube. Since the creation of iTunes, this has become trivial". [...] The future of radio has already begun to be built with the commitment of content programs. "I believe this is the future. The radio will return to the past with the great communicators. The listener will sympathize with the announcer", he explains. [...] "If I make this list of songs, anyone can do it. That's why I do not believe in the musical radio anymore", says [Tutinha]. (Balthazar, 2014).

From this belief, in recent years, the radio station Jovem Pan FM, from São Paulo city, has broadened its broadcasts using simulcast – the transmission of the same schedule in two or more frequencies – simultaneously with the journalistic radio station Jovem Pan AM. Currently, there are “talk programs” about eight hours per day, from Monday to Friday, in addition to the soccer and Formula 1 racing schedules (Starck, 2014; Jovem Pan, 2016). In the city of Belo Horizonte, radio 98 FM devotes four hours of its programming on weekdays to soccer, presents sports shows, as well as journalistic programs and even a humorous program – *Graffite* –, all of which are spoken (98 Live, 2016).

In the south of the country, Atlântida Network, which already broadcasts two editions of the humorous talk-show *Pretinho Básico*, launched in 2007, added the sports show *ATLGrenal* (Grupo RBS, 2015) in 2015 and, in 2016, *ATL News* to its programming (Atlântida FM Network, 2016). It should be noted that these movements occur precisely in broadcasting stations focused on the young musical segment, dedicated to a more qualified public, therefore, tending to be the first to replace traditional media – such as radio – by digital platforms when they intend to listen to music.

On the other hand, this requires higher investments, especially in human resources, something that is not feasible for all broadcasters, mainly in times of retraction of investment in advertising, just like the present situation in Brazil. This issue is sensitive when it comes to music broadcasters, since these are businesses with much lower costs compared to *all news* stations, for example. Such a profound change in the programming format would require musicals to commit part of the profit margin with which they are accustomed to work, as well as to take on other types of concern, including politics and editorials.

Another issue that stands out among the three examples cited is the most evident option of Jovem Pan FM in not only widening the range of spoken content, but doing so through attractions that are not necessarily aimed at the young audience for which it originally is directed, especially when we observe the time devoted to programs focused on economics and, above all, on politics. This may be credited to the specific situation of synergy with Jovem Pan AM, owner of traditional products such as *Jornal da Manhã* (Morning News, in Portuguese) and soccer, the preferred sport among Brazilians, but whose results were limited by the technical difficulties faced by the transmission in modulated amplitude (AM). This kind of strategy is not observed in 98 FM, nor in Atlântida Network, both with spoken programs that privilege young speakers and themes that are most interesting to this audience. Still analyzing the case of Atlântida, we observe that it is part of a holding (RBS) that owns a journalistic broadcaster – *radio Gaúcha* –, which operates in FM frequency since 2008. Therefore, it does not need space in the schedule of another broadcaster of the conglomerate to spread its programs, not demanding to replicate the situation occurred in Jovem Pan of São Paulo.

In addition to the editorial and cost issues previously mentioned, investing in its own spoken content requires the music broadcaster to give up, albeit partially, certain revenue modalities already enshrined in this segment, such as promotion of artists and events. In other words, more than changing the schedule, the whole business model of the broadcaster would be changed. This indicates that, in order to survive the changes imposed by new technologies, more than just modifications are required: it is necessary to completely reinvent the way businesses are done.

5 Final Remarks

Even assuming that the current scenario remains for the next few years – that is, blockbusters continue to dominate world audiences to a large extent, albeit coexisting with an ever-growing immensity of long tail niches –, one cannot conceive that the media, beginning with radio broadcasting stations, continue to act in the same way as today. The mere fact that traditional media are constantly losing audience and revenue, while new options for content consumption, especially music, are constantly emerging, imposes the urgency of the stations to reposition themselves.

It is true that transformative actions have emerged, such as the examples cited in this article, about Jovem Pan, 98 FM and Atlântida. Future failures on their part could even be justifiable, since the risk of failure is naturally greater when it comes to a pioneering act. What is difficult to explain is the rarity of initiatives of this type, that break with the existing mainstream and seek a path that aims to preserve or, if possible, extend the relevance of a media as popular and traditional as radio. Conservatism does not combine with markets whose consumer constantly evolves.

Music is, and probably will always be, a noble part of the radio. It is a fundamental element of the culture of any civilization, and as such should be part of the menu of any electronic medium that intends to portray the trends of the audience for which it is directed. In addition, the musical repertoire, for its low cost, is a resource that enables, with quality, even lower-income schedules. On the other hand, music should not only be used as a resource to reduce expenses: it should be seen as a cultural element, respected through an intelligent curatorship that prioritizes the interest of the target audience. At a time when convergence is a basic concept, having exclusive content becomes paramount for radio stations, which can only broadcast the way they want the audios they own, which is not the case for music.

The recent past proves the good results generated by the union between radio and digital media. From the live player to the podcast, a world of new opportunities opens for production, distribution and audio consumption. Even within this turmoil, broadcasting cannot lose sight of its essential truth, which goes far beyond playing music: promoting relationships among people and between people and businesses (Morgado, 2011). As long as the radio preserves this adage, it will preserve itself.

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