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## **In Sync? Music Supervisors, Music Placement Practices, and Industrial Change**

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The role of the music supervisor has been tested and cemented by changes to the music placement environment in the twenty-first century. With music supervision no longer tied primarily to film and music licensing now viewed as a critical revenue stream for all levels and types of music makers and companies, the role itself involves a wider range of activities and greater number of variations than ever before. The pairing of pre-existing popular music with audiovisual media is woven into activities across the cultural industries, and music supervisors, accordingly, occupy key positions in cultural production. As Anderson puts it, “as a profession, music supervision has risen from what was once an often disregarded, below-the-line dimension of the film and television community” to “a sometimes pricey, above-the-line consideration for navigating a new media ecosystem that is focused on issues of licensing and clearance” (2013: 372).

Music supervision grew in prominence during the latter decades of the twentieth century as back catalogs became “increasingly valuable financial resources for Hollywood studios” (Smith 1998: 209). Smith’s work on music supervision represents a rare early consideration of the role, the activities of which can include “creation of a music budget, the supervision of various licensing arrangements, the negotiation of deals with composers and songwriters, and the

safeguarding of the production company's publishing interests" (1998: 209). The title of music supervisor has long been applied flexibly and this is even more so the case today. Music supervisors can be freelance or salaried employees. They can be based in media companies; sound design or dedicated music supervision companies; or advertising agencies. They can specialize in a particular type of screen media; a particular type of music; and original compositions, pre-existing recordings, or both. While in Smith's account, music supervisors were often treated with contempt by directors and other creative workers (2001), today's music supervisors can play a significant and powerful role in cultural production.

New technologies enabled by digitalization and challenges to traditional musical recording revenue streams have together placed licensing and related practices front and center in attempts to monetize and promote music-making. Musicians, music publishers, and record companies look to licensing as a source of income; creative and commercial clients attempt to import the meaning of pre-existing music and the credibility of professional musicians into new spaces; and a range of brokers have emerged with business models designed to accommodate the increased demand for and pace of music placement. Music supervisors have proven their value beyond film as popular music has taken on greater importance across screen media, including television, advertising, and gaming.

This chapter will address significant creative and commercial trends of music placement that have emerged across various screen spaces, promotional and artistic, traditional and new—and will reflect on the professional consequences for music supervisors and musicians. Our analysis draws on trade press coverage and is informed by previous interview-based research on music supervisors and other music industry executives (Klein 2009; Meier 2016). We consider how the growth in music supervision activities—and the characterization of music placement as

a panacea for music industry woes—belies the devaluing in economic terms of musician and music supervisor labor, raising important questions about the value assigned to creative labor in the contemporary music marketplace. The benefits afforded by technological advances must be carefully weighed against the problems tied to an extremely stratified system of remuneration for music supervisors and musicians alike.

### **Studying music supervision**

Studies of music on screen necessarily consider the work of music supervision, though the music supervisors themselves and the decisions they make have rarely been addressed explicitly. Most often, such work has focused solely on film, has privileged analysis of text over context, and has evaluated music placement on a primarily aesthetic basis, reflecting “a more general tendency in film music studies to weight aesthetic concerns over technological, economic, or cultural mechanisms” (Smith 1998: 3).

Research that has moved beyond a traditional film studies approach contextualizes the work of music supervision by highlighting continuities and differences across screen media, and by exploring industry perspectives and the role of cross-promotion. Early examples include Burns and Thompson (1987), who locate music videos in relation to traditions of using music in film and television, including commercials. Although their focus remains on the texts, their analysis notes the role of commercialism and cross-promotion as driving decisions. Denisoff and Plasketes similarly shift the conversation from an aesthetic to an industrial one as they explore the entertainment industry’s pursuit of ‘synergy’ in the 1980s, a strategy through which “the motion picture and recording industries simultaneously promote a single product” (1990: 257).

Their account reveals the roots of some of the current promotional approaches to music on screen. Smith likewise stresses the significance of the economic, technological, and cultural factors that inform the context of production; his approach to understanding film music involves “locating film scores in a detailed historical framework, one that is sensitive to film music’s commercial functions as well as its more general circulation throughout a culture” (1998: 3).

The commercial context of music supervision has been more recently explored through textual and content analyses of music in the necessarily commercial form of advertising (see, for example, Graakjær 2014; Allan 2008) and by explorations of music supervisors and their practices in film (Lewandowski 2010), television (Anderson 2013), and advertising (Klein 2009; Meier 2011; Taylor 2012). This body of work highlights the role of the music supervisor as balancing commercial and creative objectives, and acting as mediator between multiple industries with sometimes competing interests. It also reflects changes to the role over time: film is only one arena in which music supervision now takes place and it is common for supervisors to work across multiple media. There are many more people in the role of music supervisor, and the growth of the area and enthusiasm for it can be seen in a range of dedicated conferences and events (e.g., SyncSummit, The Billboard/Hollywood Reporter Film and TV Music Conference). As Anderson writes,

The rising importance of the music supervisor is the result of three distinct changes that have restructured music industry distribution systems in this decade-plus climate of perpetual crisis: the reassertion of the importance of publishing; the change in what it means to be a ‘label’; and the growing need for media branding strategies in a continually sprawling multichannel environment. (2013: 372)

These and related changes provide the backdrop against which music supervision has developed.

At the same time, scholarship on the cultural industries has examined how the oversupply of available creative laborers has led to under-employment, low pay, and exploitation, particularly for more junior workers (see Miège 1989; Hesmondhalgh and Baker 2011; Hesmondhalgh 2013). Critical work that focuses specifically on the music industries and on musicians' position as workers has highlighted the consequences of unfair talent contracts for recording artists (see Stahl 2013; Stahl and Meier 2012). Optimistic accounts of music supervision must take into account the labor conditions not only for music supervisors but also the musicians whose work they seek to use.

### **Changing industrial contexts**

Digitalization has redefined the role of music supervision by simultaneously presenting major challenges to and opportunities for the music industries. Peer-to-peer (P2P) file sharing networks and music streaming services together threw into disarray the recording industry's financial reliance on record sales. In a post-CD market, diversification became key and once ancillary revenue streams, including live performance and—crucially for the status of music supervision and music supervisors—music publishing, were re-positioned as increasingly important sources of revenue for the music industries. As Sony/ATV Music Publishing's David Hockman explained back in 2004, "We're reshaping our organization to take account of market changes due to the economy. We're becoming more proactive in marketing copyrights to potential synch users and focusing personnel resources on that specific area" (quoted in Bessman 2004). A synchronization or 'sync' license, which comprises master use rights (the actual recording) and

publishing rights (the composition), allows for music to be used in audiovisual media for a fee which is allocated to the rights holder (typically record companies, music publishers, and/or musicians). Sync revenues in aggregate swelled in the following decade and continue to grow. The International Federation of the Phonographic Industry (IFPI) cite an annual increase of 8.4 percent globally in 2014, with massive gains in France, Germany, and Japan (2015).

Digitalization also brought with it new tools and platforms that afforded greater opportunities for musicians outside the traditional record label system: unsigned artists vied with label-supported artists in the ever-crowded online space, and increased competition led many musicians to look for any chance to be heard. Sync rights became especially attractive as a solution to challenges of both revenue and exposure for holders of music copyright. Because one of the key responsibilities of music supervisors is clearing rights, growth in sync licensing goes hand in hand with growth in all varieties of music supervision.

Fortunately for music supervisors, developments in digital technology also enhanced the ability to locate and clear music for use on screen. In a book aimed at would-be music supervisors, Adams, Hnatiuk, and Weiss describe the digital era of music supervision, noting,

the ability to preview, send, and receive music over the Internet and Intranets radically re-shaped the workflow of the modern music supervisor. Online searches for licensing information, as well as the electronic ability to complete license requests and other licensing functions with performing-rights organizations and publishers gave music supervisors unprecedented efficiency and access to the world of music and sound effects at large. As bandwidth increased and music production software became more intuitive,

music supervisors also had increased responsibilities towards the creation and production of TV, video games, and online entertainment. (2005: 7)

It is clear that practical challenges associated with digitalization—and specifically the threat to traditional music revenue streams—have been met in part by greater focus on the exploitation of sync rights.

At the same time, cultural tensions (e.g., art versus commerce debates) attached to music licensing have often required a nuanced negotiation by music makers and those seeking to place music on screen. While licensing a song for use in a more ‘legitimate’ art form, such as film, may be contrasted with licensing a song for use in a purely commercial form, such as a television advertisement, commercial blockbuster films and aesthetically powerful commercials blur the distinction. Fred Kovey, an advertising creative involved in music placement, noted the fuzzy line between having a music video directed by Michel Gondry and having a “song used in a commercial directed by Michel Gondry” (quoted in Klein 2009: 54). The turn to sync rights has propelled a collapse of boundaries and an opening up of a wider range of opportunities. Musicians may still rank different screen spaces, but historically ‘lower’ forms, including television programmes and commercials, have been elevated (Klein 2009; Anderson 2013; for industry perspectives, see D’Arcy and Scott 2010; Rabinowitz and Scott 2010). Licensing music for use in commercial media is not new, but it is no longer discussed or agreed in hesitant or hushed tones: musicians are more likely now to treat the use of a song in an advertisement, video game, or television programme as comparable to inclusion on a film soundtrack. The shift is not simply opportunistic (might as well use the opportunity to make money and gain exposure) or desperate (this may be the only way to make money or gain exposure), but also cultural: promotionalism has shaped the contours of work inside the music industries (Powers 2013).

The transformation of the music industries may have been driven by digitalization, but it has been shaped significantly by the growth of promotional culture, in which elements of marketing and branding became standard filters through which communication takes place (see, for example, Aronczyk and Powers 2010; Davis 2013; McAllister and West 2013). Promotional culture itself can be understood as a response to the increased competition and clutter enabled by digitalization: promotional culture and digitalization have fed off each other to the extent that creative practices like music-making become necessarily intertwined with commercial opportunities (see Klein et al. 2017). The role of the music supervisor has always had links to strategies of cross-promotion: indeed, Smith argues that the “multifarious cross-promotional strategy” between film and music industries “gave rise to several important developments in the fields of film scoring and film marketing after 1975” (1998: 189) including the formal appearance of music supervisors. The power balance in the relationship between the film and music industries has since shifted: music companies had more leverage in the ’80s and ’90s when their revenue was more consistent and reliant largely on record sales. More recently, music companies and musicians have become increasingly dependent on music placement and, accordingly, music supervisors. For producers of screen media, music licensing is a buyer’s market: musicians are eager for their songs to be licensed and willing to do so for ever smaller fees (Rabinowitz and Scott 2010).

Just as the internet enabled more people to create and distribute their music, it has allowed more people to seek a career in music supervision, but not all are able to make a living. New platforms and technologies have increased the speed and effectiveness of music supervisors—and have allowed many to enter the field on a freelance basis more easily. Old hierarchies have collapsed—reputable music supervisors are as likely to work on television

advertisements as films—while new hierarchies have emerged: music licensing intermediaries preying on the desire of unknown musicians to have their songs heard offer a different service than boutique agencies seeking to pair musicians with well-suited licensing opportunities. In the next section, we map various models of music supervision and reflect on the status of the role of the music supervisor.

### **Mapping music supervision**

The client-driven orientation of music supervision means that, despite the blurring boundaries noted above, distinctions between project types are still discernible and can be significant. The objectives and requirements of film studios, television production companies, video game publishers, and advertisers vary. Music supervisors must be attuned to the specificities of the medium. As music supervisor Amy Fritz explained, the “function of music in ads is to sell a product,” “the function of music in a film is to help tell the story of the film”, and video game music functions as “wallpaper” (quoted in Meier 2016). Such distinctions influence the type of music and sound desired. According to music supervisor Stacey Horricks,

Ads usually require a definite hook, something to grab attention sonically in addition to the visuals. And with 30 seconds to do so, everything needs to happen fast. With film and TV, you have much more freedom. Placements are longer, often mixed differently and [are not] really genre specific. (quoted in PlayItLoudMusic 2011)

Music supervisors may be generalists able to find the right match for a broad range of uses or may be specialists in certain media.

Music supervisors may work for firms that offer services to diverse clients or may work internally for a media company or even a consumer brand. At film studios and television production companies, music supervision, licensing, and production may be coordinated in-house. At the same time, film and television music often is selected and cleared by music supervisors who work for outside firms. Mirroring these two sectors, video game publishers may have in-house music departments that handle music supervision and licensing (e.g., Konami, publisher of DanceDanceRevolution and American Idol games, and Activision/Blizzard, publisher of the Call of Duty and Guitar Hero series), or they may work with outside music supervision firms. Turning to advertising, large firms (e.g., Grey Group, Ogilvy, Leo Burnett) and some top consumer brands (e.g., Nike, Converse) feature in-house music departments. Specialist sonic branding firms and a wide range of more generalist music supervision firms also license music for use in television commercials.

An influx of interest in licensing popular music for use in audiovisual media, combined with tightening budgets, has placed financial pressure on music supervisors and, in turn, music makers. According to music supervisor John McHugh,

With music and supervisor budgets diminishing over the past decade, the role of the music supervisor has become more complex as they are now called upon to do a lot more for a lot less. Conversely, the amount of people pitching music to the creative supervising community is currently at an all-time high, and the number of former record label and publishing professionals engaging in independent pitching is massive. (2015)

Tighter budgets have had consequences for musicians' payouts, as explained by music supervisor P. J. Bloom:

If you expect nothing, then you'll probably be very pleased. If you expect to get one of those \$50,000 sync fees then you're probably going to be quite disappointed.... Fees have systematically gone down and down over the years and that's going to continue to happen. (quoted in Pakinkis 2013)

Although some music supervisors see themselves as responsible for negotiating a fair fee for artists against unfair requests—"Can we use your song and give you a Twizzler?", parodied music supervisor Dan Burt (quoted in Klein 2009: 75)—supply and demand is pushing average fees downward.

In addition to considerable music knowledge, music supervisors need specialist legal and technological expertise (see Adams, Hnatiuk, and Weiss 2005), and in this relationship-driven business, established music supervisors with valuable industry contacts are at a substantial advantage. As entertainment attorney and music industry expert Donald Passman explains, music supervisors "call on their relationships to pull favors and smooth out difficult situations, getting music into pictures that couldn't be there any other way. Music supervisors are in a sense 'marriage brokers'" (2012: 454). The creative role can be secondary to other tasks. According to Bloom, "While the creative aspect of what I do is certainly the most fun and most exciting, ... it's probably only 20% of my work" (quoted in Pakinkis 2013).

Nevertheless, given their tastemaking role, the creative and interpretive ability of music supervisors remains fundamental. New tools for searching catalogs may aid in the process of music selection, but they do not erase the need for human involvement (Inskip, MacFarlane, and Rafferty 2008). Music supervisors are expected to act as curators of music. Consider the film soundtracks that have been curated by star recording artists who presumably are not experts in

the legal and practical processes of licensing: for example, singer-songwriter Lorde acted as music supervisor for the blockbuster film *The Hunger Games Mockingjay: Part 1* (dir. Francis Lawrence, 2014), marking a continuity with a trend that emerged two decades ago when Babyface acted as music supervisor for *Boomerang* (dir. Reginald Hudlin, 1992) and *Waiting to Exhale* (dir. Forest Whitaker, 1995), and Trent Reznor for *Natural Born Killers* (dir. Oliver Stone, 1994) and *Lost Highway* (dir. David Lynch, 1997) (Smith 2001).

A star system based around perceptions of specialist knowledge and taste has evolved over the years inside the world of music supervision. Top figures secure high profile jobs and accolades: for instance, P. J. Bloom of television programs *American Horror Story* (2011–2016) and *Glee* (2009–2015); Thomas Golubic of television programs *Breaking Bad* (2008–2013) and *Six Feet Under* (2001–2005) and the film *The Hurricane* (dir. Norman Jewison, 1999); and Dave Jordan of television program *Empire* (2015–) and blockbuster films *Guardians of the Galaxy* (dir. James Gunn, 2014) and the *Iron Man* series (2008–2013). Various award ceremonies (Guild of Music Supervisors Awards, Music Week Sync Awards, Music+Sound Awards) have been introduced to recognize supervisors and reward placements in advertising and videogames alongside placements in television programs and film. The Guild of Music Supervisors was established in 2010 with membership limited to those who meet specified thresholds for media credits, number of campaigns, and years working in the role. Signs of professionalization and the reinforcement of hierarchies suggest attempts to narrow participation, though it remains possible to operate on a smaller scale.

Within the domain of elite music supervisors, the case of Alexandra Patsavas of Chop Shop Music Supervision is especially notable. Her credits involve the *Twilight* films (2008–2012) and television programmes *Gossip Girl* (2007–2010), *Grey's Anatomy* (2005–), and *The*

O.C. (2005–2007)—cases touted for placing the spotlight on lesser-known and independent musicians and thereby helping to ‘break’ new artists (Anderson 2013: 118-20). She launched her own label, Chop Shop Records, demonstrating the significance of music placement as a form of music marketing. In contradistinction to commercial radio with its close ties to the major record companies, such opportunities have been championed as more open to the wider world of popular music. Amid this success, Chop Shop entered into partnerships first with Warner-owned Atlantic Records and then Universal Music Group (Barker 2013), signalling the fact that the connections between the various entities involved in music placement are often tighter than may first appear.

Against the image of openness suggested by the popular press and music blogs, opportunities available to unsigned recording artists remain relatively closed. Although there are always exceptions to the rule, unsolicited recordings are largely seen as undesired, given the high volumes of music submitted to music supervisors. Instead, songs vetted by music companies are pushed to the front of the queue. For instance, when asked how she finds new music, Horricks indicated that “70% of the time it’s from the labels, publishers and music licensors who send their latest releases via email” (quoted in PlayItLoudMusic 2011). Record companies and music publishers are central to this system, and the majors (Universal, Sony, and Warner), whose catalogs are the deepest and most star-laden, are at a powerful advantage.

Record companies and music publishers cater to the demand for pre-existing music by offering online platforms that allow the would-be licensor to sift through and sort catalogs on company websites, with filters enabling searches to be refined according to genre or lyrical theme or even mood. Universal Music Publishing U.K. launched UMPGSongs, which Senior Marketing Manager Alice Greaves claims

provides creative, cutting edge tools to help our clients quickly uncover the perfect music for their advert, film, TV series or game—whether they are looking for something highly specific or simply to browse for inspiration. We’re confident that UMPG Songs will make our clients’ jobs quicker and easier, whilst continuing to achieve the very best for the artists and writers we represent. (quoted in Music Week 2014)

Such software is now common, with major publishers, independent publishers, and even stock audio and production music companies offering similar functionality. A range of smaller independent music publishers also flex their muscles in music supervision and sync licensing (e.g., Manners McDade Management & Agency, Songs Music Publishing).

The rise of amateur, semi-professional, and smaller-scale media producers has spurred the development of new music supervision and licensing services. In response to the popularity of videos shared online (via sites such as YouTube), apps, and other small-scale audiovisual media, a new specialization within the world of music licensing has emerged: “micro-licensing” for personal and small commercial uses. For example, Cue Songs, a company launched by Peter Gabriel, “hopes to be the one-stop shop for licensing music, throwing the doors open to everyone from website designers, to marketing presenters, students or major advertising campaign managers” (Hick 2012). Key to such business models is high volume sales of low cost uses of music, with micro-licensing company Rumblefish (2015) offering opportunities to license pre-cleared music for under \$500, for example. The growth of user-generated content and the advent of micro-licensing suggests that we all have an opportunity to be music supervisors now with both creative and legal implications.

One concerning development has been the growth of companies that appear to take advantage of the over-supply of recording artists looking for their big break. Such websites (e.g., Music Xray, TAXI) promote licensing opportunities to musicians, who typically need to pay for the privilege of being considered. The popularity of music licensing as an alternative revenue stream for musicians has, paradoxically, made it less viable as an alternative, sometimes resulting in the exploitation of eager musicians. The excitement around new technology can hide consequences in terms of creative labor: the ultimate result is a race to the bottom for both new entrants to music and music supervision in terms of who can provide the service most cheaply.

### **Creative and commercial consequences**

The variation reflected above offers positive and negative possibilities in terms of what the growth of music placement means for music makers and music supervisors. On the one hand, there seems to be more space to accommodate a potentially wider range of sound: it is easy to imagine, for example, that high-adrenaline video games can offer a home for music that may not have been suitable in other audiovisual spaces. On the other hand, certain venues place greater pressure on producing certain sounds and messages to the exclusion of others. The broader production context across screen media has adapted to changing music placement practices and processes, but often those alliances take place within a decidedly promotional sphere. The increasing importance of sync rights for music companies and artists can be viewed as threatening remaining spaces for making and hearing music that does not fit (in terms of sound, message, or ideology) such a model.

What comprises the work of music supervision has broadened to include a range of people, positions, and processes. But such growth can hide the degradation of labor to which it is linked. Mirroring trends elsewhere, musical labor has been devalued in economic terms amid decreasing fees for synchronization, justified on the basis that exposure may enhance other revenue streams (see Meier 2016). At the same time, musicians are expected to put more time and energy into the work of promotion (including through placement), a form of unpaid labor to complement the often underpaid labor of making music. For music supervisors, new entrants to the market of music supervision, enabled by online platforms and technology, challenge the value assigned to traditional work associated with the role as well as its professionalization.

While the changes mapped out in this chapter can be read as a positive development for producers of screen media insofar as they benefit from greater choice, smaller fees, and new efficiencies, it is important to think about music on screen as involving a relationship between multiple creative parties who need to be taken into account. As music supervision continues to evolve, reaching into all corners of the audiovisual and digital world, the potential of platforms and technologies must be balanced against an ethical approach to the creative labor on which music placement relies.

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