

# Keeping what real? Vinyl records and the future of independent culture

**Michael Palm**  
UNC-Chapel Hill, USA

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## Abstract

The revived popularity of vinyl records in the United States provides a unique opportunity for ‘rethinking the distinction between new and old media’. With vinyl, the new/old dichotomy informs a more specific opposition between digital and analog. The vinyl record is an iconic analog artifact whose physical creation and circulation cannot be digitized. Making records involves arduous craft labor and old-school manufacturing, and the process remains essentially the same as it was in 1960. Vinyl culture and commerce today, however, abound with digital media: the majority of vinyl sales occur online, the download code is a familiar feature of new vinyl releases, and turntables outfitted with USB ports and Bluetooth are outselling traditional models. This digital disconnect between the contemporary traffic in records and their fabrication makes the vinyl revival an ideal case example for interrogating the limitations of new and old as conceptual horizons for media and for proffering alternative historical formulations and critical frameworks. Toward that end, my analysis of the revitalized vinyl economy in the United States suggests that the familiar (and always porous) distinction between corporate and independent continues to offer media studies a more salient spectrum, conceptually and empirically, than new-old or analog-digital. Drawing on ethnographic research along vinyl’s current supply chain in the United States, I argue that scholars and supporters of independent culture should strive to decouple the digital and the analog from the corporate, rather than from one another. The pressing question about the future of vinyl is not, will there continue to be a place for analog formats alongside the digital; but rather, to what extent can physical media circulate independently of the same corporate interests that have come to dominate popular culture in its digital forms?

## Keywords

Analog, culture, digital, format, history, independent, labor, music, production, technology, vinyl records

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## Corresponding author:

Michael Palm, UNC-Chapel Hill, CB#3285 Bingham Hall, UNC-CH, Chapel Hill, NC 27561-3285, USA.

Email: [mpalm@unc.edu](mailto:mpalm@unc.edu)

The meanings we ascribe to any technology depend on the others available, and it follows that any designation of particular media as new or old is necessarily a comparative claim. Music formats in particular have been susceptible to precipitous reassignments from new to old. In the United States, vinyl records' stint as the default format for music consumption lasted considerably longer than that of any of its successors, namely cassettes, compact discs (CDs), and mp3s. Streaming has enjoyed an acute ascent, to the tune of revenue (from subscriptions and advertising) tripling globally between 2015 and 2018 (King, 2018). History suggests it won't be long before streaming is reclassified from new to old, but at the moment it is difficult if not impossible for music industry insiders and observers to bring streaming's successor(s) into focus. More than an occupational hazard, this myopia is symptomatic of the sway new media can hold over scholarly as well as popular imaginations. New media theorists (e.g. Manovich, 2001) and historians (e.g. Gitelman, 2006) have critiqued this tendency to privilege the new over the old, the right now over the previous or next. 'Rethinking the distinction between new and old media' is an ongoing, never ending endeavor; in this particular moment, the project entails undoing established correspondences between 'new' and 'digital' (e.g. Dinnen, 2018). And in such a context, vinyl records – a decidedly non-digital format enjoying revived popularity in the United States – make for an interesting case example.

To learn what vinyl's revival has to teach us about the relationship between new and old media, I contend it is necessary to scrutinize records' production and distribution alongside their consumption and culture. Accordingly, in what follows, after a discussion of the format's unique relationship to media historicity, I provide a brief overview of vinyl traffic today in the United States and then focus on two significant aspects of contemporary vinyl commerce in the United States: the thriving market in reissues demonstrates both how independent record labels nurtured vinyl's revival, and also how major labels are glutting the niche markets painstakingly established by the Indies. This latest clash between independent and major labels comes to a head each year on RSD. The new Hallmark holiday deserves credit for boosting vinyl sales; however, it has also become an inflationary engine driving up costs, which have increased for records as dramatically as sales. The average cost of a vinyl record today now tops US\$25, roughly twice a CD or a basic monthly streaming subscription. Major labels have embraced RSD, and they increasingly use it as an occasion to peddle erstwhile hits and proven sellers repackaged as holiday exclusives that continue to inflate 'the vinyl bubble' (Sevier and Shipley, 2013). How independent labels, pressing plants, distributors, and merchants handle the corporate takeover of RSD will influence, if not determine, whether the vinyl bubble can be deflated before it pops. Reissues and RSD have both been commercially central to vinyl's revival and traditional distinctions between new and old media help explain the success of each. And when taken together, as I argue in what follows, they demonstrate why corporate and independent remains a more useful and urgent opposition for commercial popular culture than new and old.

## Good old analog

With vinyl, the distinction between new and old media plays out more specifically as an opposition between digital and analog formats. It can be easy to forget that it wasn't until the 1990s, alongside the emergence of personal computers, cell phones, and the Internet, that the term 'analog' mutated and its usage began to 'wildly proliferate' (Sterne, 2016: 31). *An* analog still named a relationship between two disparate signals, but now *the* analog became a state unto itself, synonymous with nature, and the digital's new opposite. A preference today for analog technology as somehow more

real than its digital successors is based on a ‘a truly radical periodization’, whereby for ‘about 100 golden years of human history . . . roughly from the last quarter of the 19th century to the last quarter of the 20th . . . the senses and the world were somehow in harmonious alignment with media’ (Sterne, 2016: 31). Since Benjamin at least, authenticity has accrued to media recognized as old, often directly to distinguish it from an upstart competitor, and vinyl is no exception. Before vinyl gave way to its digital descendants, in other words, no one listening to records savored the format itself. (Reel to reel was the audiophile’s format during vinyl’s heyday.) Lamenting the demise of vinyl during the dawn of digital music was always ‘specious nostalgia’ in the first place (Maiolo, 2017). Plenty of listeners had loved their records, but it wasn’t until the introduction of cassettes and especially CDs that vinyl began to be valued for its own qualities as a format, above and beyond any content therein.

A linear media history from old to new would relegate contemporary vinyl enthusiasts young and old to marginal status as hipsters or holdouts. Both of these groups are well represented today in record stores (and on television<sup>1</sup>), but they hardly capture the range of investments and enthusiasms with which people are approaching or returning to records, the vi-curious and format-promiscuous along with the purists and proselytizers. Vinyls, as the kids call them, offer (among other things) a reprieve from digital saturation, a sort of divergence culture in an era of media convergence. As such, records qualify as ‘residual media’, which are always being experienced in new ways as well as old (Acland, 2007). This formulation is helpful, but I question whether it can fully capture the particular novelty as well as nostalgia animating vinyl’s newfound niche popularity. I find it more fruitful to consider the vinyl revival as part of what some media scholars have taken to calling our ‘post-digital’ condition (e.g. Berry and Dieter, 2015; Mazierska et al., 2019). Akin to post-punk and postfeminism, the qualifying prefix indicates a new phenomenon that is still-of but also-beyond. Post-digital ‘cannot be understood in a purely Hegelian sense of an inevitable linear progression’, and if ‘post-digital’ represents any kind of synthesis, then it resolves a dialectic that had been historically inverted (Cramer 2015: 16). The analog is often touted as purer than the digital, but the idea of analog purity only emerged as a reaction to digitization. In dialectical terms, the analog became the digital’s antithesis, not the other way around.

Within a post-digital framework, media experiences today are more richly understood as being comprised of digital *and* non-digital aspects, even or perhaps especially for an analog case like vinyl. Eric Barry (2014) has elaborated ‘digilog culture’ as a similar formulation and applied it to records specifically: ‘Despite vinyl’s steampunk cool and the fervor of many analog devotees, the vinyl revival has its basis in a thoroughly hybridized world of analog and digital’. Pleasures being discovered or rediscovered in records are enhanced by a rekindled appreciation for pre-digital modes of production and consumption, and vinyl is the leading case study in David Sax’s (2016) popular book, *The Revenge of Analog*; however, concepts like digilog and the post-digital underscore the fact that, nostalgia and audiophilia notwithstanding, digital technology is anything but the record lover’s enemy. The contemporary vinyl marketplace is sustained online, and no one I’ve met along the vinyl supply chain, from pressing plants to record stores, eschews digital technology (Palm, 2017). At a recent conference of record manufacturers, held in Detroit, Michigan, one plant manager went so far as to claim that ‘digital is the best thing that ever happened to vinyl’ (Rutkowski, 2018, personal communication). Sax’s similar formulation, that ‘digital helped save the very analog record it nearly killed’, signals the centrality of the Internet for contemporary vinyl commerce as well as for the format’s rearticulated appeal (2016: 11). Ironically, vinyl’s new aesthetic value is enhanced by its perceived distance from the same technology appreciated, by buyers and sellers alike, for expanding the pace and scope of its circulation.

Feedback loops abound between digital media and a thriving vinyl marketplace: not only are the majority of records bought and sold online, along with most promotion, but the download code is a familiar feature of new vinyl releases, and turntables outfitted with USB ports and Bluetooth are outselling traditional models (Digital Music News, 2017). Furthermore, the ascent of streaming over the past 5 years is understood throughout the music industry as having boosted vinyl sales (Taylor, 2017). Because vinyl ‘remains the strongest contemporary icon of analog music and its most tangible fetish object’, records are the perfect example to demonstrate how new media can play a vital role in any community and/or/as marketplace organized around a shared appreciation of any cultural forms and formats, old or otherwise (Novak, 2013: 217).

After being accepted rather than actively embraced by nearly all listeners during the middle decades of the 20th century, records have reemerged on the other side of digitization as ‘mass produced consumer goods [that] signify authenticity to today’s purchasers.’ (Barry, 2014). Invoking Benjamin directly, Susan Luckman (2013) has theorized ‘the aura of the analogue in a digital age’, and records make for an industrially manufactured (and male-dominated) counterpart to her analysis of ‘women’s crafts [and] home-based labour’. ‘By an ironic turn of events, the late modern revival and iconic consecration of mechanically reproduced analogue records neatly contradicted Benjamin’s vision’ (Bartmanski and Woodward 2015: 32). The vinyl revival exposes what Ranci ere has critiqued as Benjamin’s ‘erroneous prophecy’ about mechanical reproduction (1936, 2010: 27). Each record pressed has always been technically less detailed than the one before, demonstrating ‘that there indeed is such thing as a “unique copy”’ (Bartmanski and Woodward 2015: 33). Furthermore, despite more than a decade of booming sales for new vinyl, ‘the bulk of records traded, sold, and played today’ are on at least their second owner, and the wear and tear these records accumulate can enhance their Benjaminian aura (Sax, 2016: 20). (This preponderance of secondhand sales also makes vinyl uniquely green among popular media, rivaled only by books.)

So while vinyl qualifies as post-digital commercially as well as aesthetically, the fact remains that records’ physical creation cannot be digitized. (Some controls and collation have been digitized, and nascent attempts at 3-D printing and ‘HD vinyl’ notwithstanding.<sup>2</sup>) The process of making records involves arduous craft labor and old-school manufacturing, and it remains essentially the same as it was in 1960. Not coincidentally, during the same period (roughly 2007–2013) that vinyl records reentered the popular cultural imaginary, this time as authentic analog artifacts, the category of ‘digital labor’ became swiftly entrenched within media studies (e.g. Burston et al., 2010; Scholz, 2013; see also Palm, 2011). This correlation further underscores the utility of documenting cultural production that has yet to – or, in the case of records, cannot – undergo digitization. The digital disconnect between the contemporary traffic in records and their fabrication makes vinyl an ideal case study for interrogating the limitations of new and old as conceptual horizons for media and for proffering alternative historical formulations and critical frameworks. Toward that end, my analysis of the revitalized vinyl economy reminds us that the familiar (and always porous) distinction between corporate and independent continues to offer a more salient dichotomy for critical media studies than new/old or analog/digital. In the rest of this article I argue that supporters of independent culture should strive to decouple the digital and the analog from the corporate, rather than from one another.

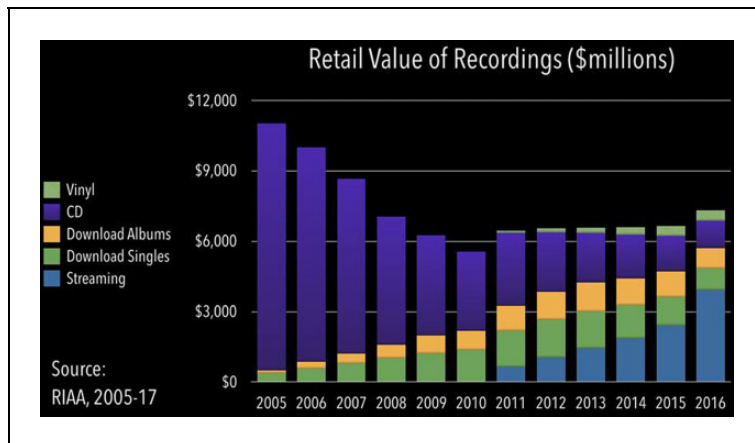
## **Vinyl revived**

The vinyl revival is no passing fad; 2018 was the 13th straight year of growth in vinyl sales, and vinyl comprised 13% of all physical album sales, the format’s highest percentage since the ascent of CDs

(Nielsen Music, 2018). While physical sales are dropping relative to streaming, down to 10% of total industry revenue, vinyl sales are climbing while CDs and downloads are plummeting (King, 2018). What's more, these rosy sales figures are only for new records; secondhand sales aren't tracked by the industry, yet markets in used vinyl are thriving online and in record stores, as well as in thrift shops, flea markets, and the like. Many chain stores have begun stocking records again, not only those with electronics and media departments like Best Buy and Target but also places like Barnes and Noble and even Whole Foods. In 2014, Urban Outfitters sold over 8% of all new vinyl in the United States, trailing only Amazon (Billboard Staff, 2015). However, independent merchants sell over two-thirds of new records as well as virtually all used records. In the Bay Area, home to infamously high real estate prices, the past 5 years have seen more record stores open than close (California Association of Realtors, 2018). Suffice it to say that the Internet did not kill the record store as a local, independent cultural institution any more than the CD or any of its digital descendants extinguished vinyl.

No doubt, countless record stores have been shuttered as distributors, retailers, and collectors move their business online, but at the same time many savvy proprietors use online sales to subsidize their brick-and-mortar shops as independent venues for culture and community as well as commerce. In fact, it has become a successful strategy for new record stores to establish their brand online and then open a shop once sales reach a consistent level that can sustain the added costs. In Durham and Chapel Hill, North Carolina, where I live and work respectively, the two shops moving the highest volume of records both fit this description. They each continue to generate more revenue online than from store sales; meanwhile, they also host parties DJ'd by owners, employees, and regular customers, as well as free in-store performances by local and touring bands, not to mention the hanging out that has always animated record store culture. (In addition to the visibility and prestige that comes with a downtown address or otherwise desirable location, for merchants of bulky goods like records, a shop also functions as valuable storage capacity, even if the majority of sales occur online.)

Vinyl's resiliency is not simply a case of weathering one digital storm after another; rather, each new format from 8-tracks to mp3s has recast records in new light as well as shadows. The latest dominant mode of music consumption, streaming, has largely cannibalized other digital formats: downloads and CDs sales have plummeted alongside the ascent of streaming, while for 5 years running revenue from streaming and vinyl have climbed at virtually the same rate (RIAA, 2018; see Figure 1). In 2017, sales of physical formats surpassed downloads (Sanchez, 2018). Despite the mp3's recent hold on the popular (and scholarly, e.g. Sterne, 2012) imagination, revenue from downloads only topped physical sales for about 5 years. And despite the growth in physical sales overall, CD sales continue to plummet. Some chain stores like Target and Best Buy have cut back on ordering new CDs or stopped stocking them entirely, while both chains have resumed selling not only records but record players. In a June 2018 *Rolling Stone* article titled 'The End of Owning Music: How CDs and Downloads Died', Jack White triumphantly predicted that 'the next decade is going to be streaming plus vinyl. Streaming in the car and kitchen, vinyl in the living room and the den. Those will be the two formats. And I feel really good about that' (Knopper, 2018). The former White Stripes front man founded the music label Third Man Records, which recently opened its own record pressing plant. For the past decade, White has been vinyl's most prominent champion, singing the format's praises while plugging his own releases on outlets like *The Tonight Show*. (Thanks in no small part to White's popularity and mainstream appearances, it is again standard practice for talk show hosts to hold up a record, rather than a CD, while plugging a guest's product. Even comedians such as Wyatt Cenac have embraced vinyl for their albums.<sup>3</sup>) Streaming is still a very young format and one that major labels have helped cultivate for many reasons, despite losing



**Figure 1.** Revenue from vinyl (green) has climbed alongside streaming (blue) for five years, while CDs and downloads have plummeted.

revenue share to gatekeepers like Apple and Spotify. First and foremost, labels have recognized that their payouts from streaming services are a more reliable revenue stream than per-unit sales. Streaming platforms reorganize music from ‘publishing’ media to ‘flow’ media, distinguished by Raymond Williams (2003) as being accessed rather than acquired by consumers. In other words, listeners morph from being music owners to music users. The average consumer pays 200% more annually to stream music that to acquire it in material form, be it records, cassettes, CDs, or downloads (Arditi, 2018: 1). For major labels, on the other side of this lucrative transformation, any revenue generated from vinyl is gravy.

Streaming has dramatically altered the business of selling music, and few independent labels can afford to ignore the new platforms any more than the majors. Redeye Worldwide is the largest distributor of independent music in the United States, and its two most important clients are not popular bands or successful labels, but Apple and Spotify. As Redeye’s marketing director Hank Stockard (2017, personal communication) insists, the company’s primary objective has become ‘impacting the algorithm’. The production costs for records are exponentially higher than for any other format, and vinyl’s razor thin profit margins mean that during the vinyl *vogue*, Redeye’s sales reps find themselves discouraging bands and labels on their roster from pressing records until they can demonstrate a market for them. In the wake of radio and MTV, streaming’s ‘flow’ media predecessors, today the surest path toward such a market is inclusion on the right playlist. As Stockard puts it, ‘digital experiences drive physical purchases’ (2017, personal communication). The compatibility of vinyl and streaming highlights the utility of differentiating among as well as between analog and digital formats. In a post-digital landscape, rather than maintaining an either/or opposition between analog and digital media, critical scholars of popular culture will be better served by analyzing how the two categories are mutually imbricated in our understandings of any media experience as new, old, both, or neither. The same holds for thinking about records: rather than categorizing vinyl as new or old, or even as a new post-digital hybrid of the two, it is more illuminating to consider how (and whether) different types of records fit (and don’t fit) into these categories. Toward that end, the next section focuses on reissued records and asks how the vinyl format is giving new life to old music.

## Sell It Again, Sam

During the first decade of the new millennium, as vinyl sales grew steadily and shifted online, a wave of indie labels garnered critical acclaim (and a handful of Grammys) for reissuing out-of-print albums and compiling box sets that showcased pioneering musicians across an array of genres. Reissued records have helped form, sustain, and expand any number of communities organized around a shared appreciation of particular musicians and vernacular styles. For some members of these communities, reissuing records has also become a sustainable business model. Some labels specialize in reissues, finding audiences for music underappreciated upon its initial release. Numero Group, based in Chicago, and Light in the Attic, based in Seattle, are two leaders of the reissue sector. The catalogs of other labels, like Fat Possum in Oxford, Mississippi and Paradise of Bachelors in Chapel Hill, North Carolina, feature similar reissues alongside new recordings by experimental and traditional artists. Some of these labels lavishly curate their reissues: some Paradise of Bachelors reissues, for instance, include a large color booklet featuring contemporary essays and interviews alongside archival photos and ephemera.<sup>4</sup> Independent labels employ anywhere from one person to dozens, and they increasingly compete to secure the rights for curiosities and overlooked gems from an expansive array of genres and periods. Independent reissue labels also have to recoup the substantial costs of licensing reproduction rights, especially if the master recordings are still owned by major labels or their subsidiaries. The work can be arduous as well as expensive. One of Paradise of Bachelors' slogans, emblazoned on t-shirts and beer can cozies, is 'it's a shit business'; while a small archival label distributed by Fat Possum calls itself Big Legal Mess.

Independent reissue labels continue to widen their search for marginalized music worthy of rediscovery, and fans and followers have proven willing to pay for the fruits of these labor- and often resource-intensive projects. On the heels of this modest success story, not surprisingly, reissues have also become a mainstream trend. Unlike independent labels, however, the majors tend to repackage hits that are still widely available in many formats, including used records, not to mention on classic rock and oldies stations up and down the FM dial. As one critic put it, 'it's hard to shake the feeling that the [major] labels are trying to sell their archive a third time' by targeting 'middle-aged buyers who can remember buying vinyl, naturally switched over to the CD, sold or threw away their old vinyl and [now] aren't completely [satisfied] with streaming today' (Hermann, 2015). Selling old wine in new bottles is a time-tested tactic in the music business, from greatest hits collections to generational format upgrades known as 'the album replacement cycle'. What's different this time is that the new format is an old one.

The history of the record album itself is inexorably tied to the rise of rock music. To rehash a well-worn tale: after 'concept albums' like the Beach Boys' *Pet Sounds* and the Beatles' later offerings catapulted pop music into the realm of art, the 12-inch LP joined the 7-inch single as a viable format for mass sales. Then, it was scarcely a decade before vinyl sales began to plummet as consumers flocked to cassette tapes and later to CDs. The vinyl marketplace is permanently contracted, but now rock albums are again becoming vinyl's commercial center of gravity; indeed, in many cases, the same albums are again topping the physical sales charts. (Over the past 5 years, the top-selling record in the United States is the Beatles' *Abbey Road*.) While independent labels (by and large) continue to make appropriate and sustainable use of vinyl as a format for music new and old, the market is increasingly crowded with major-label reboots, which are driving up prices alongside sales.

Meanwhile vinyl's supply-side history remains largely hidden. Throughout the 1990s and early aughts, as records were disappearing from the shelves of chain music retailers, newly pressed

records still found their way into jukeboxes, radio stations, and increasingly DJs' crates (Rietveld, 2007: 100). During vinyl's nadir several pressing plants stayed open because hip-hop and dance music producers embraced 12" singles as their format of choice. For instance, United Record Pressing in Nashville is the world's second busiest record plant by volume, and the most storied thanks to its famed 'Motown Suite' for visiting black musicians who during Jim Crow couldn't book a hotel room in town. During the 50s, 60s, and 70s, United churned out a trove of 7" singles; then, for the next three decades, United's plant was 'structured for 12-inch singles' popular among hip-hop and dance music DJs. Only in 2007 did United 'shift to the LP market' (Flanagan, 2014). Vinyl's allure for producers and DJs during the 1980s, 1990s, and 2000s was practical and economic as well as aesthetic (and tactile): not only could producers and DJs easily accumulate cheap, old records to spin, scratch, and sample, but the reduced traffic in pressing plants also meant that hot tracks could hit the club at low cost and with minimal delay.

Musical subcultures can be exclusionary along lines of race, gender, sexuality, class, and age; and those organized around vinyl records today are no exception. Vinyl enthusiasts (myself included) would be well served to recall the vital role that records played in the formation of these interracial, majority-minority, and often queer-friendly subcultures. During vinyl's 'bad old days', affordability and accessibility stemming from the format's *lack* of popularity helped make it the medium of choice for some underground cultures, emergent genres, and marginalized musical communities. The vinyl vogue today, conversely, stems in part from its exclusivity. Rising prices and rock-dominated reissues reinforce vinyl's well-earned reputation as an exclusive (boys') club with high economic as well as cultural and technological barriers to entry. For analog as well as digital formats, accessibility is unquestionably uneven, and critical media scholars should strive to expose, unpack, and attack technological inequity in all its forms. For a circumscribed case like vinyl, it may even be appropriate to speak of an analog divide, since the wherewithal to play records can be challenging for the uninitiated to come by. Historicizing records' production alongside their consumption, and tracing the 'circuits of culture' therein, can amplify the significance of form(at) as well as content in establishing the patterns of inclusion and exclusion that comprise any cultural community (du Gay et al., 1997: 18). Vinyl's post-digital popularity is noteworthy as an instance of a format being simultaneously valued for oldness and newness.

## Vinyl holiday

In rock's historical shadow, it is easy to overlook how hip-hop and dance music communities developed sustainable vinyl subcultures. Now the rock takeover of record sales is threatening to repeat itself, and rock's dominance of vinyl markets becomes most pronounced each spring on RSD, a new annual celebration of vinyl held on the third Saturday of April. RSD was cooked up by an association of independent shop owners in 2007, and in the past decade, the holiday has done more than any other event, organization or individual (even Jack White) to elevate the sales and profile of vinyl records. RSD's impact on vinyl sales rivals Valentine's Day for flowers and Halloween for candy: in 2015, in-store record sales were more than 600% higher on RSD than on the previous Saturday and more than four-fifths of sales were at independent stores.

Since then, major labels have colonized the event, seizing an opportunity to peddle their back catalogs dressed up in fancy new editions and marketed as 'RSD exclusive releases'. Shop owners appreciate the added business, but many have come to view the holiday as a necessary evil, a singularly lucrative opportunity on the calendar they cannot afford to ignore. For example, Ethan Clauset, co-owner of All Day Records in Carrboro, NC (adjacent to Chapel Hill), approaches RSD



with a crystalline strategy: ‘how much of this crap do I need to buy to entice people to come in’ (2013, personal communication)? Many shops have recently grown more judicious in their purchase of RSD releases, instead bolstering their regular stock of new and used vinyl in anticipation of holiday crowds. The past few years, All Day has stocked fewer and fewer RSD releases while celebrating the day with a marathon of sets by local female DJs and complimentary kimchi pancakes, staple fare at All Day’s parties. RSD celebrations do not require exclusive releases, and a swell of shops have stopped stocking them altogether. The practice is widespread across London, while in Chicago, Logan Records’ RSD parties spoofed the city’s meat packing history with Jivin’ Ivan the ‘record butcher’ on hand selling grab bags of bargain bin records by the pound. In 2015, Logan stopped stocking RSD releases and still enjoyed their highest daily sales as well as attendance of the year. (In 2018, Logan Records morphed into Electric Jungle, a similar shop in a different Chicago neighborhood.)

In the only scholarly analysis of RSD to date, Eric Harvey describes how its promoters hype the holiday by characterizing patronage of independent record stores as an ‘ethical decision’ (2017: 1). Drawing on Elizabeth Cohen’s (2003) historical account of the ‘citizen-consumer’ in post-war America and Sarah Banet-Weiser’s (2012) concept of ‘ambivalent brand cultures’, Harvey unpacks how RSD, Inc. lionizes ‘local record stores as temples of ethical music consumption’, while simultaneously ‘offload[ing] financial risk onto small stores’ (2017: 585, 586). Identifying RSD as an ambivalent brand culture helps Harvey explain how ‘the ethical and the exploitative are not contradictory but can coexist’. (2017: 3) No matter how relentlessly independent shops are promoted as ethical bastions of authentic culture, the fact remains that store owners who ‘order exclusive releases without being able to return unsold merchandise are assuming most of the risk’ (Harvey, 2017: 5). Harvey’s primary ethnographic source in Bloomington, Indiana ‘estimate[s] having to save up US\$10,000 solely for exclusive merchandise’ (2017: 5). In Washington DC, the stalwart indie shop Crooked Beat, continues to celebrate RSD while its owner, Bill Daly, considers the day to be ‘basically a wash’ for his bottom line (quoted in Harvey, 2017: 5).

The success of RSD has also become a problem for record production. Vinyl’s severe economy of scale means that pressing plants increasingly delay small-batch runs in order to accommodate mass orders from major labels, especially during the annual run-up to RSD. As one indie label owner put to the *New York Times*, ‘The problem . . . is that some of the bigger plants might get an order for an Eagles box set, and everyone else is put on hold’ (Sisario, 2015). The backlash against RSD is reflected in sales figures. Independent shops continue to celebrate (with some adopting the slogan ‘every day is record store day’), but overall RSD sales have plateaued. After annual increases of over 100% for 4 years running, RSD’s gain globally in 2015 was a paltry 4%, a gross figure that does not account for the fact that major labels have released more exclusive records every year. (The inaugural RSD in 2008 saw 10 exclusive releases; the following year, the number jumped to 85, and in 2018 was well over 300.) 2014 was the first year that reissues outnumbered new releases among RSD exclusives, and the following year only 11 of the top 50 exclusive releases contained newly recorded material. And given rock’s dominance of the reissue market overall, it is not surprising that in 2015 less than 10 of the top 50 sellers on RSD came from other genres, primarily hip-hop and country. This lack of diversity among the top sellers on RSD obscures the fact that fewer independent labels are even bothering anymore to market exclusive releases recorded by underground and emerging artists.

At best, the major labels’ embrace of RSD and their frenzy of repackaging hits indicates confidence in vinyl’s future; far more likely, it means they are overinvesting in vinyl on the cheap to cash in while they can. All of the major labels stopped manufacturing their own records when

CDs entered the scene, and during the 90s, most pressing plants were retrofitted to stamp CDs, sold for parts, or simply shuttered. Today, the majors send their vinyl orders to independent plants like United in Nashville. By outsourcing production, as one critic put it, ‘the majors are . . . buy[ing] their way [back] into an industry that they played a significant role in destroying . . . attempting once again to starve the indie labels, the very labels that never gave up on vinyl’ (Hermann, 2015). Although, encouragingly, Sony announced in 2017 that it has purchased pressing machinery with plans to begin manufacturing its own records, which would mark the first time in 30 years that a major label had done so.

After sustained growth among independent labels and outlets for over a decade, major labels (and chain stores) predictably embraced records as a growth sector and began ratcheting up their orders with no concern for stability. For the first time in 50 years, vinyl supply stopped keeping pace with demand and production continues to bottleneck. Back orders and delays of vinyl records have become expected, especially for independent labels and shops, as pressing plants scramble to fill bigger orders first. Independent manufacturers and distributors as well as labels and retailers are addressing the new pressure points along vinyl’s supply chain. To counteract corporate glut in the vinyl marketplace, the advantages of independent manufacturing are plain to see. Recently, due to overwhelming demand, for over a year United stopped accepting orders from new customers, until they could open a second plant with 16 new presses, raising their total to 38. Meanwhile, some independent record labels have purchased their own presses. Two hundred miles down I-40 from United in Nashville, Fat Possum Records has opened its own plant, christened Memphis Record Pressing. Fat Possum used to have their records pressed in Europe and then shipped to a Sony warehouse in Indiana for distribution. Now, production as well as distribution can be taken care of in-house. And the Secretly Group, a coalition of independent labels including Numero, have invested in a new plant in New Jersey and begun pressing some of their own records as well as those of other independent labels. Vinyl’s continued viability as a commercial format is less a question of technological obsolescence or cultural trends than of plain old corporate greed. By pressing as well as distributing and selling their own records, these independent labels are investing in a supply chain for their records that can continue to thrive, regardless of whether the major labels and chain stores decide, once again, cut and run on vinyl.

## **Conclusion: Independent music anew**

In a recent *Convergence* article about ‘willing digital disconnect’, Claes Thorén et al. (2017) sidestep what they call the ‘traditional dichotomy of “analogue” and “digital”’ by focusing on technology’s ‘aesthetics and affordances’ rather than its materiality or lack thereof. Consumers seeking authentic culture, they argue, should seek ‘legitimacy in hybridized technological solutions rather than in the either-or of the digital [/analog] divide’. Playfully referring to the experiential bleeding between analog and digital as ‘the hipster’s dilemma’, they conclude that ‘searching for “analogue” in the post-digital society is not only difficult but will in the end reveal to be futile’ (p. 13). By assuming that computation has become an everyday aspect of life on earth, the formulation post-digital can help criticism move beyond binaries such as analog/digital. In this article, I have tried to bridge the analog/digital divide between the traffic in records and their fabrication, in order to elaborate the vinyl revival as an example of post-digital commercial culture. A shift in attention away from distinctions between analog and digital formats can help us focus our inquiries – and our advocacy – toward the possibilities for independent culture in a post-digital age.

One pernicious implication of a quest for analog purity, whether embarked upon by hipsters or media historians, is that it can lead us to assume that digitization and corporatization proceed in lock step. For independent merchants of popular music, the two often do go hand in hand. Digital formats generate competition for vinyl retailers; however, online sales have been a boon for merchants small as well as big. Furthermore, nearly all independent record labels offer their catalogs in digital as well as physical formats. Hardly a threat, digital media provide additional platforms for sales and promotion. Rather than relying on the term, analog, to animate ‘a hermeneutics of suspicion to the digital’, scholars of popular media will be better served by decoupling the digital from the corporate and continuing to direct our critical scrutiny toward the latter (Sterne, 2016: 42). The distinction between independent and corporate should not be overstated or assumed as absolute, any more than analog versus digital (or new as opposed to old). It is difficult if not impossible to ever identify a cultural experience, especially a commercial one, that is, entirely independent. Yet commercial independence still strikes me as a much better goal, however utopian, than format purity.

The pressing question about the future of vinyl is not, will there continue to be a place for analog formats in a post-digital world; but rather, to what extent can physical media circulate independently of the same corporate interests that have come to dominate popular culture in its digital forms? Within the music industry, acquiring artifacts (CDs and mp3s as well as records) has given way, as the leading mode of consumption, to accessing content via streaming platforms. The digitization of popular music continues to develop into a thoroughly corporatized affair; meanwhile, for independent labels and merchants who sell music in physical as well as digital formats, the re-embrace of vinyl by major labels and chain stores has become as overbearing as the tightening corporate stranglehold on digital distribution. In a post-digital era, distribution is ‘no longer a valid criterion for the distinction’ of a music label as independent (Galuszka and Wyrzykowska, 2019: 33–34). David Hesmondhalgh and Leslie Meier have argued that digitization ‘calls for a revisiting and perhaps redefining of what independence means and could mean for popular music’, and I answer their call by suggesting that production, rather than distribution, may provide a new criterion (2015: 111). To combat the corporate incursion into vinyl markets, some independent labels are vertically integrating and beginning to manufacture as well as distribute and sell their own records. The stakes of vinyl’s future involve the viability of an independent supply chain for popular music, and these stakes are raised in a media landscape dominated online access to content controlled by corporate gatekeepers.

To conclude, David Novak’s account of cassette culture in Japan helps me envision a future for vinyl as a niche sector within, rather than outside or beneath, a music industry dominated by streaming. Records share many attributes with cassettes, including what Novak calls an ‘obstinate material form’ that thrives on interpersonal exchange, even if that exchange is mediated online (2013: 222). Novak also celebrates cassettes for offering practical as well as aesthetic independence from industrial production, but these are offers that vinyl cannot match. The fabrication of records is mind-boggling complex, comprised of manufacturing processes immune to digitization but thankfully not to independence. Whereas cassette tapes and CDs afford alternatives to industrialized production, the vertical integration of independent labels promises control over their records’ manufacturing. And in a post-digital world, the independent creation of popular cultural artifacts provides an alternative twice over, regardless of whether the format is analog or digital, old or new, both or neither. Distinguishing the independent and the analog, and prioritizing the former, will help us avoid the pitfalls of debating what’s really real.

## Notes

1. For example, in Aziz Ansari's show *Master of None*, the protagonist's apartment prominently displays his records and record player; and a recent American Express series of commercials featuring Carrie Brownstein (of *Portlandia* and Slater-Kinney fame) is but one advertising campaign to capitalize on vinyl's new cool factor.
2. See Ulanoff (2013), Resnikoff (2018).
3. Cenac's 2014 release, *Brooklyn*, was a vinyl-only release, and his 2016 album, *Furry Dumb Fighters*, was also available for download but not issued on CD.
4. For example, PoB's 2016 reissues of Terry Allen's first two albums each contained 20 page 12" × 12" booklets containing essays by the likes of David Byrne and Dave Hickey, as well as photographs of Allen's visual and multimedia art.

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### **Author biography**

**Michael Palm** is an Associate Professor of Media and Technology Studies in the Department of Communication at the University of North Carolina, Chapel Hill. He is the author of *Technologies of Consumer Labor* (Routledge, 2017) and is serving as President of the UNC-CH chapter of the American Association of University Professors. He is writing a book about the contemporary supply chain for vinyl records.