

Death by Streaming or Vinyl Revival? Exploring the Spatial Dynamics and Value-Creating Strategies of Independent Record Shops in Stockholm

Abstract

The contemporary retail landscape is in flux and there is a growing perception that shopping at bricks and mortar stores is more expensive and time-consuming than shopping online. For music, illegal downloading and streaming have restructured the retail landscape and put thousands of record shops out of business. Yet, some retailers remain attractive consumption spaces. Drawing on a qualitative case study of independent record shops in Stockholm, this paper considers three value-creating strategies that sustain these physical retailers in the digital age: cultivating in-store consumer experiences, creating value through curation and tapping into global markets by going online.

Keywords

Music; Record Shops; Stockholm; Value Creation; Curation; Consumption; Retail

Introduction

The contemporary retail landscape is in flux. Digital technologies are democratizing the tools of production, creating new channels of promotion and distribution and exposing local firms to global competition (Bugge, 2011; Hracz et al., 2013). With massive selections, low prices and free international shipping, e-commerce giants, such as Amazon, threaten the survival of smaller retail chains and independent shops. Moreover, the ability of online platforms such as Apple's iTunes store, Netflix and Spotify to stream digitized cultural content such as movies, music and books to mobile devices makes consuming this content increasingly 'on-demand' and placeless. As a result, there is a growing perception amongst consumers that shopping at bricks and mortar retail stores is more expensive and time-consuming than shopping online.

Existing studies suggest that retailers can generate distinction, value and consumer loyalty by providing personalized advice, or curation, from individuals with high levels of cultural capital and offering retail environments that offer unique, exclusive and authentic shopping experiences (Bourdieu, 1984; Crewe, 2010; Hracz et al., 2013; Leslie et al., 2015; Williams and Connell, 2010; Witz et al., 2003; Zukin, 2010). Despite some notable exceptions (Aspers, 2010; Crewe, 2016) these processes remain under-theorized in economic geography. There is a need to investigate the evolving relationship between physical and virtual spaces of consumption, the nature and effectiveness of competitive strategies and the preferences and practices of contemporary consumers.

Music is at the forefront of the digital revolution and the challenge facing independent retailers is acute. Illegal downloading and, more recently, streaming of music has restructured the lucrative nature of music retailing and put thousands of chain and independent record shops out of business in Europe and North America since the late 1990's (Hracz, 2012; Leyshon, 2014). However, despite the apparent obsolescence of physical formats and retail spaces, the demand for vinyl records is increasing and some independent record shops remain attractive spaces of consumption (Bennett and Rogers, 2016; Hendricks, 2015; Magaudda, 2011; Sonnichsen, 2016).

Drawing on a case study of independent record shops in Stockholm, Sweden, this paper considers the key question of 'why' by exploring 'how' some of these physical retailers use spatial dynamics and value-creating strategies to remain competitive in the digital age. After outlining the research design and reviewing relevant theory related to retail, consumption and curation the paper presents three strategies: (1) cultivating in-store consumer experiences, (2) creating value through curation, and (3) tapping into global markets by going online.

The paper contributes to existing literature in economic geography and the broader field of consumer culture in several ways. Instead of continuing to privilege global chains and capital-intensive retail spaces such as supermarkets and luxury flagship stores in the U.S. or U.K. context

(Marshall, 2013), it focuses on local independent shops within the understudied, yet influential, marketplace of Stockholm (Power and Hallencreutz, 2007; Power and Jansson, 2004). It also advances the analytical focus within the music marketplace, from the crisis of downloading to the contemporary impact of streaming (Watson, 2015). The empirical findings also nuance our understanding of consumer culture, the experience economy, the links between materiality and symbolic value, the importance and dynamics of the intermediary function of curation and the complementarity of physical and virtual products, channels and spaces.

The Geography of Retail

Geographers have become increasingly interested in the relationships between retailing, space, consumption and labor (Crewe, 2016; Leslie et al., 2015; Waxell, 2014). Some studies have focused on how retail and consumption spaces facilitate the production and reproduction of meanings, the creation of identities and the exchange of symbolic values (Crewe, 2000; Miller et al., 1998). Others have focused on the design of particular shopping spaces and the role that architecture and innovation play in creating distinction and value in the competitive global marketplace (Crewe, 2010, 2016). The micro-spatialities of consumption spaces have also been connected to material qualities and consumer experiences including walking, touching, smelling, hearing and feeling in different retail spaces (Crewe et al., 2003; Hracz and Jakob 2015; Zukin, 2010).

Geographers have also examined the role that retail workers play in creating atmospheres, experiences and values by interacting with consumers (Leslie et al., 2015; O'Brien, 2014; Pettinger 2004). This focus on labor builds on a broader body of literature in the social sciences which examines how retail workers create value but also how they experience elements of retail work. While some studies examine workplace conditions such as modes of governance, flexible shifts, low pay and spatial dynamics, others focus on the need to perform 'aesthetic labor' which

involves cultivating and exploiting the embodied capacities and attributes possessed by workers (Leslie 2002; Pettinger, 2004; Warhurst and Nixon, 2007; Witz et al., 2003). Indeed, interactive service work is said to rely on manufacturing emotions and performing ‘styles of the flesh’ or as Williams and Connell (2010) argue: ‘looking good and sounding right.’ As these studies have privileged formal urban spaces including high streets, malls, supermarkets, department stores, high-end flagship stores and global firms (Crewe, 2010, 2016; Leslie, 2002; Miller et al., 1998) there is a need to explore these processes in smaller scale, alternative and less-capital intensive consumption spaces, including independent shops, in a range of locations and markets. (Crewe, 2000; O’Brien, 2014).

There is also a need to determine the impact of new technologies on the nature of consumption and the relative roles and importance of different retail spaces and actors including bricks and mortar stores and shop clerks (O’Brien, 2014; Waxell, 2014). Indeed, the internet facilitates on demand consumption and social media platforms such as Facebook, Twitter and Instagram make branding and promotion omnipresent (Bugge, 2011; Colombani and Videlaine, 2013). While these developments appear to be making consumption ‘placeless’ recent studies demonstrate that place and strategically-staged spaces remain important for creating and communicating value(s) (Crewe, 2010; 2016; Hracz and Jakob, 2015).

Consumption as Identity

The notion that consuming specific cultural products such as music, fashion and art allows individuals to construct identities and communicate characteristics such as class, status, individuality and levels of cultural capital is nothing new. Indeed, the pioneering works of Veblen ([1899] 1912), Simmel (1904) and Bourdieu (1984) identify and interrogate the complex system of codes, symbols and signs through which value(s) are created and consumption choices are made. However, digital technologies and the forces of globalization accelerate consumerism and

choice (Hracs et al., 2013). The democratization of cultural production has reduced entry barriers and increased supply while the internet has created and hybridized channels of promotion and distribution (Bugge, 2011; Hracs, 2012). Thus, the desire for social distinction, prestige and personality performed through consumption and style is intensifying.

Fashion may have been the original signifier of class but the consumption of music has become a powerful way of forging self-identity and signaling the belonging or opposition to groups, scenes and subcultures (Hesmondhalgh, 2013). Although these signals were traditionally shared by displaying physical artefacts, such as record collections, in the digital age phones, 'apps' and social media, collect and transmit a constant stream of, often unfiltered, information about what people listen to and 'like' (Colombani and Videlaine, 2013; Bartmanski and Woodward, 2015B). Therefore, just as consumers need to make more informed choices, the volume of product options and related information is increasing and many consumers lack the time, energy and knowledge to navigate the marketplace and exercise their judgment of taste (Shipman, 2004; Jansson and Waxell, 2011). Facing this challenge, a growing number of consumers are 'getting help' from cultural intermediaries who perform the important, yet poorly understood, function of 'curation.'

Conceptualizing Curation

Cultural intermediaries are market actors, existing in-between producers and consumers, involved in the framing, qualification and circulation of symbolic goods, services and experiences (Bourdieu, 1984; Maguire, 2014; O'Brien, 2014). They share common characteristics, including high levels of cultural capital, and positions, within subcultures, scenes, industries and organizations, which contribute to and validate their legitimacy and authority (Maguire, 2014). Yet, intermediation has rarely been studied systematically and the exact nature of the positions intermediaries hold within value chains and networks and the functions they perform within the

marketplace remain ambiguous (Foster et al., 2011). For example, existing literature describes intermediaries as co-producers, gatekeepers, brokers, agents, match makers and taste makers (Hracs, 2015).

To narrow the focus, this paper asserts that record shops and clerks can be understood as intermediaries who perform the specific function of curation. The word ‘curate’ is derived from the Latin verb ‘curare,’ which means taking care and is traditionally associated with art and museum collections (Balzer, 2014). Over time the role of curators has shifted from preserving and archiving art to selecting, evaluating, displaying and framing pieces. Recently, the concept has been extended and applied to curators in other fields such as music, fashion, food and craft (Hracs, 2015; Jousse and Hracs, 2015; Leslie et al., 2015; Shultz, 2015). Based on this literature, and our own research, we understand curation to involve caring for objects and interpreting, translating and shaping the marketplace through the strategic practice of sorting, organizing, evaluating and ascribing value(s) to specific products.

In the contemporary, digital and globalized marketplace for music curation is evolving and becoming integral to the creation and communication of values (Balzer, 2014). By extension, some traditional, or professional curators such as, newspapers, magazines, record shops, radio and cultural institutions are being challenged by new or less formal actors including music recommender systems, algorithms, amateurs, bloggers and social media platforms (Webster et al., 2016). As new roles, spaces and opportunities for curation emerge research is needed to investigate how specific actors, including record shops, are adapting to increasing competition and technological change.

Research Design

The empirical material presented in this paper comes from a case study of independent record shops in Stockholm. This study constitutes one strand of a larger research project which

examines the processes and spatial dynamics of curation within three Swedish sectors: art, music and high-end audio equipment. Given the exploratory nature of the project, sub studies and specific research questions, the case study on record shops used a mix of qualitative methods (Baxter and Eyles, 1997; Valentine, 1997). Twenty in-depth semi-structured interviews lasting between 45 and 90 minutes were conducted (2012-2014). Ten interviews were conducted with individuals who work at record shops, as owners or clerks, representing approximately one third of all record shops in Stockholm. Not all record store clerks can or should be understood as intermediaries or curators – especially those in different countries and market segments who may not have the knowledge base or autonomy to interact with consumers without ‘scripts’ or corporate codes of conduct (Leslie, 2002). However, given the small size of the shops, the nature of retailing in Sweden and our in-store observations, all of the clerks in our sample functioned as intermediaries. These respondents were asked a range of questions related to themes such as the evolution of the music marketplace, the nature of music consumption and curation and their experience working in record shops. Ten interviews were also conducted with key informants who occupied a range of relevant positions within the marketplace, including industry organizations, music streaming firms, major and independent record labels, live venues and radio stations. These respondents were asked similar questions and provided valuable insight into Sweden’s music marketplace and the evolving nature of music distribution, curation and consumption. Each interview was recorded with the consent of the respondent and transcribed verbatim.

Although the interviews generated detailed data and allowed respondents to express experiences and opinions in their own words, retail spaces and record shops, in particular, contain complex physical and social milieus, including store layouts, interactions and behavior, which cannot be fully understood through mere description (Bartmanski and Woodward, 2015B; O’Brien, 2014). Therefore, we supplemented and triangulated our interview data with

observation. For each shop in our sample we spent additional time observing (in store and online) a range of dynamics and activities related to space, curation, consumption, value creation, interaction and labour while taking photos and writing notes (Bryman, 2012; O'Brien 2014).

Data Analysis

The process of analyzing the interviews involved a systematic process of coding and re-coding (Crang, 2005; James, 2006; O'Brien, 2014). Each transcript was analyzed phrase by phrase while thematic codes, annotations and reflective notes were added. After this 'open coding' (Crang, 2005) the data was organized into categories which corresponded to the themes and questions from the interview guides, observation criteria and literature or that emerged from our annotations and reflective notes (O'Brien, 2014). A process of axial coding followed through which connections between and within categories and subcategories were made. At this stage some codes and subcategories 'broke down' while others emerged as more pervasive or poignant across the sample (Crang, 2005). We then moved toward identifying preliminary theories and collapsing categories into overarching themes through an iterative process of moving back and forth between the data and the research questions, interview guides, observation criteria and literature (James, 2006; O'Brien, 2014).

The research design and data analysis were also shaped by three additional factors. To get a broader sense of the micro-spatialities and practices contained within record shops we also conducted similar observations in 45 additional shops located in other parts of Sweden (Uppsala) as well as cities across Europe (Manchester, Rotterdam) and North America (Chicago, Toronto). This allowed us to triangulate our findings and proved useful in determining and interpreting key themes.

A wider and ongoing set of projects which examine the impact of digitization on the nature of music production, distribution, curation and consumption also informed the paper. These

projects involve 95 in-depth interviews with musicians and key informants within the music industry and participant observation at live performances and music studios. Each author has also engaged directly in the industry and this familiarity, as noted by Valentine (1997), proved useful in establishing rapport with respondents and interpreting the rich results of the interviews and observation.

Study Site Context

We conducted this study in Stockholm for several reasons. Sweden is a well-established player in the international music industry and Stockholm features a strong export-oriented music cluster with a large number of local and global music firms involved in core (song writing, music production) and related activities such as music video production and music instrument software development (Power and Hallencreutz, 2007; Power and Jansson, 2004; Tillväxtverket 2012). With respect to the digital transition, Sweden is an extreme and illustrative case (Musiksverige, 2014; Power and Hallencreutz, 2007; Power and Jansson, 2004). Sweden features high levels of internet penetration and Swedish music consumers have been at the forefront of adopting digital practices such as illegally downloading music (Pirate Bay was run by tech savvy Swedish libertarians) and embracing new streaming services (Spotify launched in Sweden in 2008). Moreover, the percentage of digital music sales is relatively high in Sweden, 88% of the total in 2014 (Musiksverige, 2014), and this has, arguably, put even greater competitive pressure on physical formats and retailers, such as independent record shops, than in other markets such as the U.S. and U.K. Like Berlin (Bartmanski and Woodward, 2015B), within the global context of record collectors and music tourists Stockholm also appears to be a popular vinyl hotspot.

Music retailers typically cluster in neighborhoods that attract consumers who are interested in cultural products and experiences ranging from music to art, design, fashion and literature (Sonnichsen, 2016). Indeed, Bartmanski and Woodward (2015A) argue that these urban locations

are places and ‘playgrounds’ for communities and carrier groups that produce and consume culture and especially records. International examples include Soho in London, the Northern Quarter in Manchester and Queen West in Toronto. In Stockholm, independent record shops have traditionally located in two different neighborhoods. Once the place to be, (1) St. Eriksgatan has become stale due to gentrification and the ageing of its residents. By contrast, (2) Södermalm has become a vibrant destination for young locals and tourists. Like other gentrified ‘hipster’ quarters in other global cities, Södermalm hosts a dense network of fashion boutiques, design houses, art galleries and cafes surrounding the record shops.

For record shops, the primary benefit of being located in a cluster is the increased ability to attract customers. As one respondent asserted: “It is a win-win situation because the shops don’t overlap or steal customers...They help bring people in who will come and look at records for a day and go to all the shops.” Like other clusters there is ‘healthy’ competition between shops who simultaneously monitor, learn from and draw motivation from each other. As one respondent explained: “We have spies that go around...We know the people working in those stores and we know what they’re doing.”

In Södermalm, many shops have developed a unique niche and this limits direct competition. For example, some stores sell a broad range of genres and formats while others only sell vinyl or used vinyl in specific genres such as jazz, hip-hop, latin or electronic. In addition to specializing in different genres, the shops cater to consumers who are differentiated by taste preferences related to modes of acquiring and listening to music (Bartmanski and Woodward, 2015A; Laguina et al., 2015).

Music Retailing in the Digital Age: The Rise of Streaming

Until the late 1990’s recorded music was only available in physical formats (vinyl records, cassettes and CDs) and consumers were forced to visit independent or chain-owned record shops.

Our respondents called these the ‘happy days’ because demand was strong and there was no need to be innovative or strategic to make sales. In the early 2000’s the introduction of digital formats (MP3s), file sharing networks (Napster), the widespread practice of illegal downloading and other issues including changing consumer tastes, the rise of entertainment alternatives (DVDs, cell phones, the internet), copyright legitimization and corporate complacency constituted a structural shock to the music industry (David, 2017; Hracs, 2012; Leyshon, 2014; Marshall 2013). Although file sharing was blamed almost exclusively by media and major labels for the economic downturn, the industry was already struggling and scholars have argued that file sharing was merely a ‘tipping point’ (Hracs 2012; Leyshon, 2014; Marshall, 2013).

Irrespective of the exact causes, while the ‘MP3-crisis’ shook the entire music industry, it was traditional retailers, who failed to diversify their product offerings and amend their strategies, who bore the brunt (Hracs, 2012). In Sweden 700 music retailers closed between 2000 and 2010 (SCB) whereas in the U.S. approximately 1,200 music retailers closed between 2000 and 2003 and giants such as Tower Records declared bankruptcy in 2002 (Power and Hallencreutz, 2007). By the mid 2000’s digital music was monetized and distributed through legal channels such as Apple’s iTunes Music Store. This stabilized the fragile balance sheets of the major record labels but the immediacy, convenience and price of the internet had irrevocably altered music retail and the relationships between music producers, retailers and consumers (Hendricks, 2015).

As the music marketplace continues to evolve we argue that there is a need to move beyond illegal downloading and the MP3-crisis to consider the impact of legal streaming on the nature of consumption and the relevance of bricks and mortar stores. Unlike Apple’s ‘pay per song’ model, which sought to replicate the traditional consumer experience of buying and owning music (but in a digital format), music streaming services allow consumers to rent access to over 30 million songs for a small monthly fee or for free (in the add supported version) (Watson, 2015).

Whereas streaming has only recently taken hold in North America, with Apple Music being released in July 2015, the Swedish firm Spotify, which has emerged as the global leader, launched in Sweden in October 2008 (Watson, 2015). Thus, the impact of streaming is more discernible in the Swedish context and several respondents asserted that streaming has been more disruptive than downloading. As two shop owners explained:

Downloading was difficult but Spotify killed us!...Because they told consumers that they could get all the music in the world for the same price as one CD.

The same day that Spotify started sales went down by about 20 or 30%. The idea that people could get access to music online and they didn't have to pay for it and they didn't actually have to own anything has been a big change.

Music Consumption in the Digital Age: The Resurgence of Vinyl

Digital technologies have facilitated the profusion of independent music production, new marketing and distribution channels and ways to consume music and the marketplace has become global, saturated and highly competitive (Hracs, 2012). Unprecedented choice empowers consumers but negotiating the marketplace to discover interesting and relevant content has become difficult and the demand for personalized recommendations is increasing (Colombani and Videlaine, 2013; Hracs et al., 2013; Webster et al., 2016). Thus, despite losing their monopoly on distribution, record shops remain vital spaces and sources of music-related curation.

The ubiquity of digital music has been accompanied by a resurgence of vinyl records (Magaudda, 2011). Between 2006 and 2013 vinyl sales in the U.S. increased by 599% with two-thirds being purchased at independent record shops (Hendricks, 2015). In Sweden, vinyl sales increased by over one thousand percent between 2010 and 2015 and currently (2015) account for 3% of total music sales (Ifpi Sweden, 2016). As one respondent explained:

In the late 1990s I think we had one box of records - maybe 40 or 50 different titles and that was it. Now vinyl is really big in our store and certainly other stores. Now every month I would say that between 30% and 50% of our sales come from vinyl records!

After reaching its peak in the 1970's vinyl was able to survive successive rounds of technical innovation in the 1980's and 1990's because of the strong support of music collectors and subcultures, including post-punk, ska-reggae and dance-based genres, who prized records for their material qualities and symbolic value (Magaudda, 2011). The current resurgence is driven by nostalgia and fetishism but also consumers discovering or rediscovering vinyl's material qualities and the ritual experience of finding, opening, feeling, looking at, listening to and displaying vinyl records (Bartmanski and Woodward, 2015B; Hayes, 2006; Hendricks, 2015; Sonnichsen, 2016). Indeed, Bennett and Rogers (2016) argue that vinyl records have acquired aesthetic discourses of authenticity and coolness due to their sound, feel, and packaging. As one respondent argued:

Vinyl sales are going up because people are tired with streaming. Streaming is a new thing but customers still want a cool item for the home, to put on the coffee table to display...And then there are these Hi-Fi lovers who play the vinyl because the sound is much better.

In addition to older consumers trying to resurrect nostalgic experiences of record collecting, young people - in their teens and early 20's - are buying vinyl either instead of or in conjunction with digital formats (Hayes, 2006; Kjus, 2016; Magaudda, 2011). As one respondent explained:

This has changed over time. I would say two years ago we didn't have that many 20-year-olds in the store, but now we have loads of them. And these younger people, they buy vinyl. The hipsters are coming in!

Thus, consuming vinyl allows individuals to signal their resistance to mass-market formats and content and to engage with music in a more 'real' or 'authentic' manner (Bartmanski and Woodward, 2015B; Hayes, 2006).

In the early 2000's an apocalyptic mix of blank CDs, illegal downloading and e-tailing put record shops on the verge of extinction (Hracs, 2012). Yet, while many music-centric chains have been replaced by 'big box' retailers such as Wal-Mart – or Media Markt and Åhléns in the Swedish context – and thousands of independent shops have gone out of business, physical formats and retailers have not disappeared. In fact, many independent record shops in cities such as Stockholm, London, Toronto, Chicago and Los Angeles have weathered the storm and some

are even expanding (Sonnichsen, 2016). The subsequent sections analyze three main value-creating strategies distilled from the empirical material.

Cultivating In-Store Consumer Experiences

The search for status through consumption is never ending and the ubiquity of goods has compelled some consumers to shift their focus to experiences (Trigg, 2001; Zukin, 2010). Firms in many sectors endeavor to ‘stage’ environments, artifacts and contexts that facilitate interaction and allow consumers to co-create their own experiences. Crucially, spaces are not mere production sites or containers of economic activity but also important sites of consumption that shape interactions and exchanges between producers, intermediaries and consumers (Hracs and Jakob, 2015).

Like other specialized retailers including independent book shops (O’Brien, 2014) and fashion boutiques (Leslie et al., 2015) independent record shops remain spaces where meanings are created, rituals are performed, interactions occur and experiences are staged and consumed (Sonnichsen, 2016). The findings suggest that beyond simply selling music, some record shops create value by cultivating authentic atmospheres and catering to the demands of different consumers, from local ‘regulars’ to trans-local ‘record tourists.’

At a time when music can be streamed with the push of a button, the act of visiting a record shop remains a valuable cultural experience for many consumers (Hayes, 2006). As Hendricks notes, there is a ritual dimension to “walking into a store, picking up a record, touching it, going home and listening to it” (2015: 10). Some shops reinforce these rituals and build anticipation by displaying the new additions to the collection (including rare and coveted used albums) only on set days and times. Indeed, Bartmanski and Woodward (2015B) argue that excitement and enchantment is produced in the second-hand vinyl market through the quest for collectibles colloquially known as ‘crate digging’ (or ‘scrolling’ in Sweden).

While some consumers spend hours ‘scrolling in silence,’ many consider the shops as social spaces and derive value from hanging out with clerks and other consumers who may belong to similar subcultures. As one respondent asserted: “It’s a social thing...you come to the store, you get some information...and talk about music interests. I usually put coffee on when we have our regulars in the store.” Another owner even bought the unit next door to put in a café. The findings also suggest that shops must balance between catering to specific groups, differentiated by age, gender, appearance, taste, genre or subcultural affiliation, and being inclusive and welcoming to new customers. Many respondents spoke of the unfair reputation of being snobbish and exclusionary institutions and that regulars, especially during ‘new arrival’ frenzy periods, can be intimidating.

To generate greater exposure, reinforce their position within scenes, attract new customers and reward their regulars, record shops also stage a variety of events and experiences. These typically include live shows, artist visits, record signings and live DJ sets. These events are promoted in-store, online through blogs, social media and websites and in other shops and cafes in the local neighborhood. As one respondent explained:

For special events we use the website and Facebook to promote. Our plastic bags have our website and we try to promote traffic to the physical and virtual store. We want people to be aware that we exist online the website promotes all of the in-store shows and physical things. We also have a newsletter which talks about in-store activities. So the idea is that both spaces should complement each other and work together.

This demonstrates that strategic shops harness virtual channels to sell physical products and that physical and virtual spaces, as well as local and global scales, complement rather than compete with each other.

Creating Value Through Curation

Although music-related curation has become increasingly important in helping consumers to navigate the saturated marketplace, the growing range of actors (music journalists, algorithms and

friends) offering curation and channels (magazines, blogs, social media and apps) exacerbates the challenge of finding the right content (Colombani and Videlaine, 2013; Joesse and Hracs, 2015; Webster et al., 2016). Thus, the relative attractiveness and value of curation hinges on its qualities and effectiveness. Our research suggests that some independent record shops offer consumers a form of curation - face-to-face interactions that yield personalized recommendations from trusted curators with high levels of cultural capital (Bourdieu, 1984) - that is valuable and difficult to replicate electronically or in virtual spaces (O'Brien, 2014). Indeed, record shop clerks are skilled at identifying subtle clues and translating this information into concrete recommendations. As one respondent explained: "if somebody walks in the door and they have a certain look I can usually tell what they're looking for without them telling me...It is something you learn to develop over time."

Despite recent advances in electronically-mediated communications (Grabher and Ibert, 2014) and the ability of modern algorithms to convert vast amounts of personal data into meaningful suggestions (Webster et al., 2016) respondents also told us that face-to-face interactions in physical spaces are still the best way to send and receive information. As one owner argued:

Sometimes people get recommendations from Amazon and it's computer-generated and they laugh...If you go into Spotify and you try to find some new music it's a mess. But when you come to the store and you talk to one of us you get the real recommendations. People are so busy now that I get a lot of people coming in to the store who say 'give me five good albums.' And if they like three or four of them they will come back for more recommendations and buy more albums.

In describing these interactions, many respondents raised the importance of trust and credibility and consumers appear willing to seek and accept the advice of clerks because of their position in the marketplace, experience and personal biographies (Maguire, 2014; Webster et al., 2016). In addition to working behind the counter at a record shop, which signals high levels of cultural capital, many clerks have also gained specialized knowledge, experience and notoriety as musicians, DJ's, collectors or hardcore fans. As one respondent explained:

For most people the trust comes from the fact that I am standing behind the counter at this record store and I'm surrounded by music-related stuff. But for some big music consumers there is even more trust if they know that I've been playing in bands or that I have been a DJ.

Beyond legitimacy, experience enhances the value of their curation and may elevate it above algorithm-generated playlists or the opinions of part-time bloggers. As one respondent argued:

[The ability to make recommendations] is definitely a skill that I've acquired through being a DJ for 27 years and owning my own record store for 10 years. I don't think the average person can do it as well or as quickly as I can.

Trust is also strengthened over time through repeat interaction (Storper and Venables, 2004). As one respondent explained: "I have some regulars who come in to get my suggestions...and they really love the idea that I know what they bought last time." Trusting relationships can also encourage a two-way flow of information and feedback (Leslie et al., 2015). As one respondent explained:

When I introduce somebody to a new band, song or album and they really like it they will come back and tell me about it...It's a rewarding ego boost...Some of the regulars here start to understand what kind of music I like and they will come in and give me suggestions too.

Beyond recommending music, clerks also help obtain music by making special orders for rare or limited products - something not possible through Amazon or iTunes. They also add value by using their knowledge of the marketplace to educate consumers, helping them, for example, to understand and filter the confusing amount of information about music and vast array of product variations (some albums have over 50 versions listed online). Respondents also explained that through repeat interactions consumers become more knowledgeable and confident and may stop asking for advice. However, even without direct interaction between clerks and consumers, by offering a limited, or pre-curated, supply and enabling physical browsing, the shop remains a valued filter and regulars keep visiting. As one respondent explained:

There are a lot of people who come in here who are regulars to the store, they don't come here to talk to me. They like the selection here and the fact that it is limited is actually a good thing...People also like browsing around in a physical space where they can touch and pick things up and see what is next to music they like.

Interestingly, many independent record shops not only curate music but a range of related products including scene-appropriate clothing and audio equipment such as turntables and headphones. For our respondents, product diversification was viewed as crucial to weathering market volatility while also reinforcing their position as curators.

As this section demonstrates, consumers value the knowledge, capital and legitimacy of the clerks, the ability to interact face-to-face and the materiality of the displays and these elements help shops compete with online retailers.

Selling Physical Products Through Virtual Channels and Tapping into the Global Markets

It is commonly assumed that local independent record shops are locked in to an outdated model of physical distribution and that they are at war with digital sources of music and curation. Indeed, one of our respondents jokingly said that the only way to keep his shop in business was to “track down and kill the inventor of Spotify.” While many record shops have failed to develop strategies to cope with the changing marketplace, our research suggests that some shops are going online and using virtual channels to tap into global markets. One shop, for example, work with a streaming service: “Since we couldn’t break Spotify we decided to join them.” They co-created an app that allows people to listen to their recommendations and curated playlists through Spotify. The respondent explained that if the listeners like the recommendations they will visit the shop and buy music and that even listeners outside of Sweden can order music through the shop’s website and have it delivered. Thus, while online distribution has created global competition and made it difficult for local record stores to sell to local consumers, some of these shops are opening up their own online channels of promotion and distribution to tap into the global marketplace. As one respondent asserted: “We have customers all over the world. We have many European, American and Japanese customers...Most of the mail-order stuff is sold outside of Sweden.”

Respondents also explained that while local regulars are crucial to sustaining their business, tourists, who may even become ‘regular tourists,’ are also important. Indeed, the findings suggest that in Stockholm there is a constant stream of tourists who make ‘pilgrimages’ to specific music scenes and shops. As one owner explained:

I call them record tourists. Maybe they come once or twice a year, maybe they live in the North or South of Sweden...they scroll through everything and can spend a couple thousand (SEK) that day instead of the regulars that come every week but only spend a hundred (SEK). So that makes the summer.

Another shop we studied runs an online mail order service for used vinyl. To stand out it employs a team of 6 workers who listen to, photograph and grade each record that comes in each week (about 300). As the manager explained:

The competition is global...each record we have has a set of information on the website and also a little blurb taped onto the record about the rating system. Online there is a sound clip from the album so that you can hear the quality of the record... For every record we have to do a new sound clip and also take photos of the actual record and the sleeve...But I think this is what gives us an edge. Because you can buy records online from different places but from most places you only get the title of the artist and nothing more.

In this way, the shop trades on its curatorial prowess but sells to consumers around the world. However, it maintains a physical storefront in Södermalm because being located in the scene enhances their credibility with global consumers and people come to the physical shop to sell or exchange their used records.

This section demonstrates that binaries which pit bricks and mortar stores against online retailers or physical against virtual products are too simplistic. As the marketplace and consumer culture evolve, spaces, channels, services and formats are more likely to complement, extend and enhance each other than compete directly.

Discussion: The Importance of Executing and Layering Strategies

These strategies help to address the question of ‘why’ some record shops remain attractive in the digital age, yet they are not particularly new or secret. After all, in-store events can be traced back

to the 1970's (Calamar and Gallo 2012), the provision of curation has been central for many years and shops have long held important positions within local and trans-local scenes and subcultures. Therefore, a more nuanced answer to the question is that some of the shops in our sample are able to do two things. First, they take these common strategies and execute them to a higher standard than their competition. For example, beyond bringing in the odd band to perform or selling coffee in the corner, these shops create in-store experiences that are unique, immersive and addictive. Similarly, beyond posting a list of recommendations on the wall, these shops carefully consider the best ways to offer curation. Finally, while any store can have a website, the most innovative shops in our sample leverage their micro-spatialities, position within local neighborhoods and their online presence with well-designed and integrated sites, blogs, apps and social media channels.

Second, successful shops layer multiple strategies to diversify and amplify their sources of distinction, value and loyalty. For example, some of the shops we looked at have spun off branded live venues or cafes, started selling and curating a broad range of products, extracted value from their curatorial reputation by selling compilations and album of the month subscriptions, developed partnerships to co-create and sell exclusive content and have joined collaborative networks and events, such as Record Store Day, to cross-promote within local scenes and global markets. Thus, the findings highlight the importance of monitoring, perfecting and combining existing strategies and constantly cultivating new sources of value.

Conclusion

This paper contributes to our understanding of consumer culture, curation, value creation and the evolving relationship between physical and virtual spaces of consumption by questioning 'why' some independent record shops remain competitive in the digital age. It argued that the ritualized and tactile experience of visiting record shops and consuming vinyl remains attractive and that

some shops create distinction, value and loyalty by staging events and creating opportunities for interaction and socialization. As music-related curation is increasingly important and there is an influx of new actors and channels, the paper demonstrated why independent record shops remain valued spaces and sources of information and advice. Indeed, their mix of knowledge, capital, legitimacy, and ability to cultivate personal and trusting relationships, enables record shops to offer a more valuable form of curation than algorithms. However, it also demonstrated that survival does not mean defiant opposition to digital developments and that the most strategic shops in our sample are finding ways to take their strengths online and increase their customer base by using virtual channels to tap into global markets. Ultimately, the paper highlighted the importance of executing and layering strategies.

In addition to emphasizing the ongoing need to examine the value propositions and relationships between physical and virtual spaces of music distribution and curation, this study raises several avenues for future research. There is a need to explore the role that specificity plays in shaping the motivations, strategies, experiences and outcomes of record shops situated within different contexts based on location, size, history, genre, subculture and market segment. For example, because of different regulatory regimes and cultural values, retail workers in Sweden typically enjoy greater pay, security, holiday time and autonomy than their counterparts in the U.S. or U.K. and these conditions may result in different employment experiences. Yet, given the high degree of micro-spatial and strategic uniformity among supposedly ‘unique’ record shops in distant markets, there is also a need to investigate the mechanisms through which they monitor, interact and learn from each other, including temporary clusters and trans-local movements such as ‘Record Store Day.’ Such a focus could contribute to existing literature in economic geography about the diffusion of knowledge, practices and values across space and to our understanding of consumption more broadly.

Beyond exploring the similarities, differences and interplay between record shops, there is a need to examine how these shops, as retailers and curators, fit into the increasingly global and dynamic music marketplace. How, for example, do record shops collaborate, complement and compete with other actors and curators within the music eco-system including musicians, radio, journalists, bloggers, venues, record labels and streaming services? And how are their relative positions evolving in the face of new technologies and consumer preferences? Indeed, although record shops provide a valuable and ‘currently’ difficult to replicate form of curation, streaming services such as Spotify and Apple are investing heavily to hire ‘human curators,’ improve the effectiveness of their music recommendation algorithms and to develop their own strategies to generate distinction, value and loyalty. Coupled with recent reports about streaming helping to drive, rather than discourage, vinyl sales, by allowing consumers to try online before buying in-store, these developments call for an ongoing interrogation of the evolving relationships between producers, curators and consumers of music as well as the range of physical and virtual formats, platforms and spaces of music curation and consumption.

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