

由節拍旋律到娛樂商品： 台灣流行音樂產業產銷結構轉變研究

學生：施韻茹

指導教授：李天鐸 博士
郭良文 博士

國立交通大學傳播研究所碩士班 摘要

流行音樂是依循產製／發行／消費的經濟邏輯，不論生產、製作、行銷都是依照市場經濟的考量，透過這些過程流行音樂的商業利益將充分發揮，因此，「市場」因素的考量，成為影響流行音樂製作和配銷的重要關鍵。國內市場消費型態的改變以及銷售數據的滑落，讓唱片公司成立合法音樂下載機制、執行專輯改版、藝人投資策略改變、以及授權數位音樂等，加上海外市場的重要性提升，尤其是大陸市場方面的影響力越來越明顯，上述產銷機制的調整證明台灣的流行音樂產業正處於一個轉折點。

本文欲從流行音樂產業的產銷機制出發，檢視九〇年代產業國際化下所建構的，並且讓台灣成為華文音樂中心的產業樣貌，在面臨 1998 年後的產值滑落，以及整體產業環境的改變，不論是科技的衝擊，或是大陸市場的吸納，流行音樂產業為因應生存之要求及相關條件下，在產銷結構運作上所有的轉變與調整。在建構出音樂產業產銷結構主要由產製、流通與配售三大活動支配構成後，本文以年代(1990-1997 與 1998 以降)為分割章節的經線，產銷結構為行文架構的緯線，並將市場形構納入討論，縱橫構論兩年代的產銷結構內涵，以結論出現今產業所行的的產銷策略，瞭解產業產銷結構的調整主要有哪些，對於整體產業的影響和定位又為何。

就 1990-1997 年間而言，跨國音樂集團將台灣視為華文音樂市場中策略重要性的特殊地區，並且力行產業國際化，帶來結構性的衝擊以及資源的重新分配。就產製而言，流行音樂產業歷經八〇年代創作能量的積累，以及九〇年代國際化過程吸引外來人材，多樣性音樂人才不斷注入激盪，創製出高估華文音樂唱片市場 80% 以上的佳績，為應付暴增的需求量，企劃導向、多人共製的產製模式興起。就流通活動而言，基於唱片市場榮景，唱片公司廣發唱片，一年高達 400 張發行量，競爭者眾，加上媒體窗口暴增，致使宣傳費用節節高昇，產業於是走向資本密集模式，導致發行流通權逐漸集中大型唱片公司手中，跨國音樂公司於此也趁勢垂直整合下游配售門市，這波配售整併的最後結果是亞洲、玫瑰、與大眾三大連鎖唱片併立。從市場形構而言，台灣市場銷售量在 1997 年繳出最亮麗的成績，創下 123 億的銷售金額，晉升到全球第 22 位，唱片產業就是流行音樂產業的代名詞，龐大的唱片市場商機成為九〇年代流行音樂產業進步創新的動

力。1990-1997年間的流行音樂產業，在市場獲利樂觀的前提下，跨國音樂公司期在投資台灣音樂商品之外，能在未來協助跨國機構攫取更龐大的大中華市場，這場美夢尤其寄託在大陸市場的想望，台灣的競爭視角於是被迫抬昇至亞太區域，也因此享有跨國資本在華文音樂市場上充分的資源與優勢。

1998年後實體與虛擬通路的盜版致使唱片市場低靡不振，加上大陸市場崛起，流行音樂產業發生重大質變。就產製活動而言，唱片公司投資保守、唱片產製量驟降，跨國音樂公司對台投資縮編減碼，而大陸流行音樂產業百廢待舉，唱片公司紛紛將台灣人才挪移至大陸進行市場開發，導致國內培訓創作藝人的機制日漸萎縮，產業創新速度減緩。唱片公司轉思在傳統的產銷結構外積極開發藝人經紀效益，將偶像符號附加在最多的文化商品上，以賺取藝人經商品化的附加價值。就流通活動而言，跨國音樂公司善用勝出本土唱片公司的跨國、跨媒體通路優勢，主導流行音樂產業的發行生態，以跨媒體、跨文化商品同步發行的宣傳效應，大幅度佔據流行音樂產業一年在市面上可茲流通的音樂商品與藝人。就配售活動而言，相較於實體商品的配售通路操縱在大眾/玫瑰和亞洲手上的集中寡斷情形，數位通路和版權貿易的配售系統卻是多元競爭的體系，數位通路和網路肇興，促使流行音樂在更多通路中被傳佈，並無限複製、再生產、再消費，延長音樂商品的生命週期，更強化唱片公司在流通權的影響力。就市場形構而言，實體商品市場下修至三分之一，藝人經紀兩成，另五成則是音樂授權貿易，可見真正支撐流行音樂產業市場的是藝人經紀市場的積極開拓，以及善用單一音樂商品、多元通路販售音樂版權，流行音樂產業以音樂製造明星，進而帶出流行趨勢，最終目的是創造所謂的娛樂，於是，音樂、明星、商品交錯相構成一個娛樂經濟。

本文結論出流行音樂產業產銷結構轉變的四個構面：商品形構與獲利機制、唱片公司的定位、跨國音樂公司與本土唱片公司的競爭關係，與華文音樂中心的結構性移轉。現今以一次製作完成的素材，不停的再複製、再流通、再消費，形成自我增殖、交織複雜的流行符號生產網絡，商品形構強調藝人資產與音樂娛樂的結合，捨棄獨以唱片為市場利基的單一策略，偶像資產以及音樂素材的再複製與再流通才是流行音樂產業的獲利機制；唱片公司的功能成功地被轉化為音樂娛樂部門的角色，成為母集團的音樂娛樂內容提供者，藉與母集團的跨媒體、跨文化產品資源聯合銷售，提高音樂商品、藝人資產、版權的經濟價值；跨國音樂公司憑藉外語音樂資源，成為華文音樂市場的品味領導者，並以優於本土唱片公司的跨國通路整合華文音樂市場，在跨媒體、跨文化產品聯合銷售的風潮下，市場經濟的廣度與深度都遠勝過本土唱片公司。正因為跨國音樂公司主導獨佔流行音樂場的流通生態，隨著大陸市場的成形減碼投資台灣，加上產業人材補料速度減緩，創新動力供給不足，華文音樂中心終將結構性地移轉至大陸市場。

關鍵字：流行音樂產業、唱片公司、產銷結構、數位通路

From Beats to Entertainment: The Transformation of Production and Marketing in Popular Music Industry

Student: Shih Yun-Ru

Advisor: Dr. Lee Tain-Do
Dr. Kuo Liang-Wen

Institute of Communication Studies
National Chiao Tung University

Abstract

The economy logic of popular music industry is production, distribution and consumption. “Market” is always the central concern in this capital procedure, and also the key factors of production and marketing. With the changes of consumption habits and market recession, recording companies found the legal music downloading mechanism, re-version albums, change talents strategies and authorize the digitalization of music. Besides, the overseas market, especially mainland China, is getting more and more important. The transformation of popular music production and marketing shows that the industry is in a turning point.

This research starts from the mechanism of production and marketing of popular music, found in the internationalization process of 1990s. It examines how the industry adjusts its capital structure to overcome the market slump since 1998 and the competition of mainland China market. Production, circulation and retail are the three main economy activities of popular music. Framed by the three activities, this research divide the development of popular music industry into two ages:1990~1997 and after 1998. Also, the discussion of market format will be included. In this way, this research aims to conclude the strategy of contemporary production and marketing, and its overall effect to popular music industry.

At the meantime of 1990-1997, the transnational music labels regard Taiwan as strategic important area to the whole Chinese market. By merging and acquiring the local recording companies, Taiwan popular music industry is internationalized step by step. As for production activity, over 80% of Chinese records are made by Taiwan because the songwriter power since 1980s and many overseas talents pour great deal creativity in music production. Recording companies published over 400 recordings per year. In this way, the publicity cost gets higher and higher to turn the popular music industry into capital intensive model. Besides, the circulation is gradually monopolized by big recording companies. And only Asia, Rose and TCR left in the wave of retailers consolidation. As for market format, recording industry is the

synonym to popular music industry. The sale volume of 1997 make Taiwan climbs to the 22nd position in world market rank. The huge market needs contribute to the industry innovation. Transnational music labels keep investing on Taiwan-made products and lift it to pan-Asia marketplace. Taiwan can take good advantage of the resources and networks given by transnational music labels.

After 1998, the piracy acts causes huge slump of records marketplace. Also the market of mainland China emerges and is open to the whole world these years. As for production activity, recordings companies are apt to be conservative in investment and reduce records publish volumes, especially the transnational ones. By contrast, the mainland China market awaits economic exploitation and capital pour. China appeals many talents and money from Taiwan so that the creativity mechanism shrinks. Recording companies focus on the high added value of artist agency by authorizing idol icon to as more cultural commodities as possible. As for circulation activity, transnational music labels synchronize the distribution and publicity acts by trans-media and trans-products promotion channels to guide the popular music industry. As for retail activity, the physical retail channels is oligopolized while the digital channels is complete competitive. Music can be duplicated, reproduced, and re-consumed in more retail channels and extend the life circle of music product. As for market format, 30% is physical music commodities, 20% is artist agency, and 50% is music copyright authorization. Therefore, popular music industry create an entertainment economy interweaved by music, star, and products.

Four dimensions of the transformation of production and marketing are found. First, the commodities format is a combination of star asset and music entertainment, not only focusing on records. The reproduction and recirculation of idols icon and music materials is the way how popular music industry makes profits nowadays. Second, recording companies are transformed to a music entertainment supplying section in the conglomerate. By means synchronic promotion acts of trans-media and trans-commodities, popular music firms can highlight the economic value of music products, artist asset, and copyright. Third, transnational music labels become the lead of music taste and integrate the global channels to guide the Chinese music industry. They own more breadth and depth of market formats than local recording companies. In this way, transnational music labels can overall dominate the production and circulation of Chinese music market. Fourth, with more and more capitals withdrawn from Taiwan and the barren mechanism of talent cultivation, the center of Chinese popular music will move to mainland China in the near future.

keywords: popular music \ recording company \ production/marketing \ digital channels