

INTRODUCTION

Sociological Congruence and the Shaping of Recorded Jazz

Since jazz is an improvisational music, recordings offer perhaps the only valid way of its preservation.

—MARTIN WILLIAMSON, INTRODUCTION TO THE
Smithsonian Collection of Classic Jazz

Records not only disseminated jazz, but inseminated it . . .
in some ways they created what we now call jazz.

—EVAN EISENBERG

I have an unusual confession to make. When I go to high-end grocery stores I like to read the food and beverage narratives printed on the products. Beyond what you see on wine bottles in these stores, you can even find narratives on a bottle of water. For example, “[xyz] begins its journey high up in the remote native forests of New Zealand’s Kaimanawa Ranges. Its voyage takes it through layers of volcanic rock and sandstone to a vast aquifer where it has collected for millennia.” Another bottle states, “Our water is bottled at the source only weeks after falling as rain on Mauna Loa.” Many scholars who study the sociology of markets will tell you that more than making the company’s water memorable, the narrative may lead us to evaluate the water as more appealing, distinctive, and maybe even tastier than if there were no narrative at all.

Now I don’t like just any narrative. I am particularly drawn to narratives that mention the “where” and “who.” I find most interesting the narratives that tell me that a bottle of water is from some “distant” land like New Zealand or Mauna Loa (Hawaii) or that provide information on the firm or its founders. And even though I have not independently tasted water from New Zealand or Mauna Loa (or maybe it is actually *because* I have not directly tasted it, but more on that later), the appeal might be different than if the same water were associated instead with upstate New York, Colorado, or Atlanta. I may be even more accepting of unusual-tasting water if I believe it came from an unfamiliar place.

So, yes, I have a strange habit of reading product narratives for fun. But my fascination with product narratives has little to do with water per se or even high-end grocery stores. Instead, it has a lot to do with this book.

One of my memories from my adolescent years is thumbing through my parents' LP record collection and occasionally placing selections on the turntable. A few records will always be with me. Marvin Gaye's *Let's Get It On* is one of the first that comes to mind, although as a child I was more interested in the cover photography than in the music. There was also Prokofiev's "Peter and the Wolf," the first child's drama I ever heard told through music. After a few listens I didn't even need the narrator; the orchestration vividly told the story. Then there were albums by Aretha Franklin, Stevie Wonder, and Mahalia Jackson. But the one I listened to the most, often as secretly as I now read bottled water narratives, was the 1973 *Smithsonian Collection of Classic Jazz* set of recordings. Listening to that collection and reading the forty-six-page text that accompanied the recordings planted a seed that, decades later, has resulted in this book.

Despite disclaimers by the collection's author and compiler, Martin Williams, I had no doubt at the time that the Smithsonian collection was a first-rate compilation of the best and most important jazz recordings, organized chronologically so that one could follow the historical trajectory of jazz. That said, I initially disliked many of the tunes. It was only after I read the text (liner notes) associated with the music that a great many of them became appealing. After reading those liner notes, the confusing songs became clearer, annoying songs became art, and everything seemed to naturally belong in the jazz canon. I began to understand not only that there were styles associated with different geographical locations (New Orleans, Chicago, Kansas City, etc.) but that there was an auditory and stylistic inventory that gave jazz its logic. The Williams narratives gave me that inventory.

To be sure, not every selection in the jazz collection benefited from a narrative. Some of them were great without the accompanying text. For example, I was blown away by Sarah Vaughan and Harry "Sweets" Edison on "Ain't No Use" and didn't need a narrative to judge its appeal. The same was true of the Modern Jazz Quartet's "Django." But for many of the selections, I initially had either no reaction or a negative reaction to the music. It wasn't until I acquired greater knowledge of who performed it, the location of the performance, or other circumstances behind the recording that I could categorize and evaluate it.

Another invaluable aspect of the Smithsonian collection was that it provided different recordings of the same tune—either by the same artist at different times or by different artists. For example, the collection begins by comparing two separate recordings of Scott Joplin playing "Maple Leaf Rag" and later compares back-to-back performances of "Body and Soul" (the first by the Benny Goodman Trio and the second by Coleman Hawkins). In fact, Williams's text repeatedly refers to multiple versions of the same tune (e.g., urging the reader to compare the Modern Jazz Quartet's and Ornette Coleman's versions of "Lonely Woman"). The implication was that to understand jazz, one can use key songs and tunes that many artists recorded as reference points. In this way, the tunes that have been recorded multiple times serve a particularly important role in orienting and understanding jazz

across its different contexts and styles. Sometimes the only thing that two different types of jazz have in common is that they perform or reference the same tunes. For instance, it is difficult to simultaneously label both Paul Whiteman's "symphonic" music and pianist Aki Takase's "modern" music as works of jazz. While Whiteman's 1920s music was a highly orchestrated and arranged syncopated style where improvisation was common but not central, Takase's music is experimental, minimalist in terms of arrangements (often just a duet), and improvisationally willing to abandon standard harmonic structures familiar to Western ears. Listening to both of them side by side would stretch one's ability to place them within the same genre, as there is very little stylistically to link the two. But what the artists do have in common is that they have each recorded similar pieces like "St. Louis Blues," and it is this commonality that allows one to place each artist in the universe of jazz—with jazz standards as one of the key forces that holds wide-ranging styles together.

The Smithsonian collection's music and text have simmered in my mind for decades now. It led me to discover volumes of jazz tunes and performances. I eventually took up the alto saxophone as a teenager, learning a bit here and there, and ultimately became a serious fan and consumer of jazz. Yet as my love of jazz grew, I became more and more perplexed as to why some tunes were noted as jazz standards while others were not. There have been over a million recordings of jazz songs and tunes,¹ but only a few hundred have been recorded over and over again. Many in this often-recorded subset are very good compositions, but there are also a lot of great compositions that failed to have the same influence and appeal as the select few that today are considered jazz standards. What sort of factors led a small minority of songs, a subset of a population of great compositions and performances, to get a disproportionate amount of attention and appeal such that they have become the "standards" that help define the genre? Why are some songs re-recorded by many musicians over time while others receive no such following?

This is the fundamental puzzle that I seek to make some headway on in this book. It is a question that I believe can be better understood by looking at the context of the initial production of a song or tune, in particular the narrative associated with the music's production. Specifically, my focus in *Shaping Jazz* is on the "where" and the "who."

Better understanding the "where" is manifested in particular ways. Just as I suspect that people evaluate water differently depending on its source (New Zealand, Canada, Hawaii, or New York), a tune's appeal as legitimate jazz depends on where it was produced as well as the record company associated with that song. Much evidence from scholars who study the perception of art indicates that if I play a new tune and tell you it is from Calcutta versus New York, you will hear the song differently.² In *Shaping Jazz*, I explore why places like New York were less often sources of appealing songs than we now understand them to be and served bigger roles as engines of diffusion rather than as sources of diffusion. I explain why and when geographical references in tune or group titles were particularly

privileged in terms of their appeal. I also explain why a place like Berlin, which produced substantially more jazz than Paris in the 1920s to mid-1930s, is now on the historical sidelines of jazz's history.

With respect to the "who," I focus on firms instead of individuals. This is not only because I believe that we have much more to learn by studying the organizations that produced recorded jazz but because I have been trained as an organizational and economic sociologist to study the role of social structure and identity in markets. I find that firms in the recording industry had an immense role in shaping jazz, just as the geographic context of production did. I explain why and how the identity of record companies affected not only what music they chose to record but also the music that they sought to be publicly associated with and how they deployed their marketing resources. In the end, I show that a tune or song's appeal as jazz is related to the narrative around its creation. The identity of the geographical and organizational context really mattered to the evolution of jazz.

This book uses empirical puzzles to better understand the early years of the market for jazz and to try to understand why some tunes had long-term appeal while others did not, and how the market boundaries of jazz evolved as a part of this process. My strategy has been to follow recordings that were re-recorded by different musicians over time and eventually gave rise to a canon of commercialized jazz. Thus "St. Louis Blues" or "Take the 'A'-Train" are part of the canon of recorded jazz, or more specifically the *discographical canon*, to the extent that many jazz recordings are made of these titles over time. I take songs and tunes that were recorded before 1933 (a pivotal year in global societal turbulence) and try to understand what distinguishes the titles that are re-recorded repeatedly over time. In this way, I treat recordings as cultural products that are, at least in part, geographical and organizational in origin.

I hope it is clear by now that this is not a typical book on jazz, in part because I am not the typical scholar to write about jazz. I am not a musicologist or a historian, and I'm too amateur a musician to speak with any legitimate authority from that perspective. Rather, I am a quantitatively oriented sociologist attempting to employ the great deal that I have learned from the works of my peers in sociology, ethnomusicology, and history. At the same time, though social histories of jazz abound, I hope this book convinces you that there is real value in integrating the conceptual and analytical tools of organizational and economic sociology. *Shaping Jazz* reframes current knowledge to yield new insights as a case study of market emergence, boundary dynamics, and evolution. As a consequence, this book speaks to how cultural markets emerge and evolve. But even here cultural markets are an instance of markets for experiential, consumption, and symbolic goods where the quest for underlying quality is elusive, deceptive, and sometimes downright misguided.

I often think of *Shaping Jazz* as my second dissertation, and it is indeed a work that took longer than my formal dissertation. Beginning in 1999, but not intently until 2003, I have been uncovering and collecting data, reading first- and second-

hand sources, listening to oral histories, interviewing musicians and audiences who experienced the music of the 1920s and 1930s, using my musical abilities to play compositions or alongside recordings of early jazz, camping out in archives in the United States and Europe, and conducting quantitative analyses on discographical data covering tens of thousands of recordings. My motivation at each step was a particular puzzle rather than an overarching research agenda. And in that way this project did not begin as a major undertaking. At the outset I just wanted to know why the largest record companies seemed to have such a difficult time producing and marketing jazz music that sounded more like that of Louis Armstrong, Jelly Roll Morton, and the Original Dixieland Jazz Band but an easier time doing so with more symphonic music closer to Paul Whiteman's performance of *Rhapsody in Blue*. Ten years later, here I am.

(SOCIOLOGICAL) CONGRUENCE

As I focused on this project, it became clear that each topic that comprises *Shaping Jazz* has a particular type of congruence as an underlying mechanism. A sociological use of congruence helps explain the role of geographic and organizational origins specifically and more broadly contributes to our understanding of how cultural markets emerge and evolve. Conceptually, my model of sociological congruence draws upon a longstanding idea across the social sciences that we evaluate certain objects, like products (e.g., a musical work), according to the cues and characteristics that exist as the context of that object's production. To the extent that there are characteristics of a cultural product that are consistent with a receiver's understanding of the context, the more the cultural product will flourish. Just like most bottled water narratives mention that their water comes from one mountain or another, we as audience members tend to think of certain types of cultural products as affiliated with particular locales or types of organizations, with some sources having more authenticity than others.

Thus the more sociologically congruent a cultural object is, the more the product and context of production match for that audience, the greater its authenticity for that audience. This is an insight I first learned from reading or talking to Howard Becker, Pierre Bourdieu, Gary Alan Fine, Wendy Griswold, Michelle Lamont, Paul Lopes, Richard Peterson, and Harrison White, in part because it mapped so well onto the work of organizational sociologists such as Glenn Carroll, Neil Fligstein, John Freeman, Michael Hannan, John Padgett, Walter Powell, and Huggy Rao. It is an insight that undergirds the thinking of many of my more immediate contemporaries such as Shyon Baumann, Amy Binder, Tim Dowd, David Grazian, Greta Hsu, Jennifer Lena, Martin Ruef, Olav Sorenson, and Ezra Zuckerman.

Hence my use of sociological congruence is not to introduce a new concept but to recognize that there is a concept that both ties together needlessly disparate

strands of sociology and provides clear guidance to understanding how markets such as that for recorded jazz can organize. I believe that sociological congruence can affect the salience of cultural products, as well as instill them with meaning and value, and thereby influence the boundary dynamics of a market. In this light, jazz tunes are “symbolic resources” that affect the creation, maintenance, contestation, and dissolution of cultural market boundaries.³

It is not enough, then, that bottled water comes from mountains but that water that tastes “normal” comes from “typical” mountains while water that tastes unique comes from unique or unusual sources. I don’t know what water from New Zealand actually tastes like, but as an American when I taste bottled water that claims to be from the mountains of New Zealand I’m not expecting it to taste like water from a U.S. source. I expect as well that the more distinct the taste, the more authentic I would imagine the New Zealand water to be.

This match between a product’s characteristic and the context of production is what I would consider one form of sociological congruence (which I will explore in some detail) where “sociological” refers to components of identity that relate to the context of production. I believe it also applies to which jazz songs and tunes received disproportionately greater appeal such that—all else equal—some jazz music has creation origin narratives that are more legitimate to the receiver than others.⁴ The nature of the origin is also affected by characteristics of the song. Thus a tune or song known to have been recorded in New York is more appealing if it “sounds” like it was made in New York to the receiver, just as the descriptive “New York rapper” has a distinctive set of aesthetic characteristics associated with it. A recording by an artist introduced as a New York rapper is more appealing to the extent that the characteristics of the recording are congruent with the identity associated with New York–based rap music. A hip-hop recording that features a rap artist playing a pan flute will suffer in appeal (with an American audience) if it is associated with being from New York, but it will have relatively more appeal if it is associated with Peru (as “authentic Andean rap”) or even the mountains of New Zealand if the U.S. audience for the artist sees the pan flute as an instrument associated with being “foreign.” In fact, it is this very point that provides one of the pillars of Peterson’s (1997) analysis of authenticity in country music.

Similarly, there are many examples that contrast the market identity of a large incumbent producer with a smaller, newer, and more “authentic” firm. Within music this often takes the form of the smaller independent label that produces music that is both unique and appealing, almost by definition. To be sure, I will provide evidence in *Shaping Jazz* that some of the differences between the larger incumbent record companies and the newer firms founding during the Jazz Age led to variance in the music produced. Even with that taken into account, my contention is that the perceptual differences were even greater. Whether (according to my data) smaller record producers recorded more small African American jazz groups in the 1920s is secondary to whether records with such origins are now seen as more authentic and thus appealing, and both could be true.

In short, in *Shaping Jazz* I emphasize that the value and meaning of cultural products are in part socially constructed through the use of the congruence of a product's characteristics and the context of production, where I privilege the geography and record-producing organization.

This notion of congruence is a common observation in classic sociology and cultural sociology but also in other fields like social psychology, marketing, and even critical economic geography.⁵ I am not a student of the humanities, but I have no doubt that some form of this idea is present there as well. The power of sociological congruence for *Shaping Jazz* is in the implications for both creativity- and innovation-based settings, allowing a parsimonious and intuitive explanation—that jazz was shaped by a drive toward congruity between songs and their sources. The congruence between a producer (such as a record company) and its output (such as a song or tune) influences everything from (1) the producer's strategy on what to produce; to (2) how the output is interpreted immediately and over time; to (3) the subsequent evolution and social order of markets.

SOCIOLOGICAL CONGRUENCE AND THE MARKET FOR JAZZ

My focus here is not to define jazz per se. I've seen too many people more qualified than I struggle, flounder, and ultimately embarrass themselves in their attempt to define jazz. In fact, many of the people we imagine as great jazz musicians don't bother themselves with defining jazz in any detailed manner. As an art form it is too dynamic for anything close to a universally satisfactory definition to emerge. Rather my goal is to better understand what tunes and songs, as components of the market for jazz, come to be privileged in representing jazz in its recorded, commercialized form. It is through these recordings that *Shaping Jazz* shows how jazz has been influenced by the social structure of the geography and producing organizations. Moreover, this influence is dynamic in that it affects how our understanding of jazz varies over time. What was agreed upon as jazz in 1925 is not the same as our understanding of jazz in 1970, and neither completely captures our understanding of jazz today. As we will see, even if we look at jazz in the 1920s alone, a wide variety of music was labeled as jazz.

At the same time, it is possible to define the *market* for jazz. That is, it is possible to capture and trace what sells for jazz and what has been marketed as jazz, and there is enough in the historical record to come to grips with it from a market perspective. Jazz recordings are critical in part because they can help bound a market and give a sense of a dynamic market center, indicated by what music is recorded and re-recorded as jazz. Take the blues-structured jazz standard "All Blues" from Miles Davis's *Kind of Blue*. A jazz musician typically has a multitude of blues-structured tunes to choose from and can choose to perform them in different ways stylistically (e.g., modal, bebop, etc.). The musician may also choose

to play an extemporaneous melody over the blues chords. However, while there are thousands of possibilities, the subset of blues-structured tunes that are actually recorded by multiple musicians over time—like “All Blues”—is small and serves the critical purpose of facilitating the coordination and evaluation of all market participants that encompass an art world. An artist records “All Blues” instead of another similarly structured tune because she is making an identity claim that in part positions that artist in the landscape of a cultural market in a way that a lesser-known but otherwise equivalent tune cannot.

In fact, I posit that a market for jazz could not have formed, flourished, and maintained legitimacy without a smaller set of tunes to serve as a common point of reference by musicians, record companies, consumers, and critics. So while defining the entirety of jazz may be depressingly elusive, capturing recorded and commercialized jazz is a more tractable exercise, as long as one comes to terms with four observations that make up the foundation of my analysis. First, the market for recorded jazz is oriented around recordings that maximize long-run appeal within a community of musicians. The market center from the perspective of recordings is anchored in the tunes and songs that were recorded more often than others. Second, jazz as a category, while porous, is also path dependent in that we reference the past categories of jazz when assessing new categorizations of jazz. Third, jazz markets can be defined around exemplars rather than the typical. In 1945, few jazz musicians sounded like Charlie Parker or Dizzy Gillespie, although many consumers remember them as representing jazz in 1945. It is more appropriate, however, to see them as exemplars that redefined the typical.⁶ Fourth, the boundaries and meanings of jazz are dynamic. Much of the music in 1925 that was thought of as legitimate jazz now lies at the periphery of the genre. We now recognize Duke Ellington as much more central to the development of 1920s to early 1930s jazz than was Paul Whiteman, but with respect to the market for jazz during this period, Whiteman was the key exemplar and point of reference. Ellington wasn't even close. While today we may use Ellington to assess the authenticity of Whiteman's more symphonic music as jazz, in the 1920s it was Ellington who was advertised as the “Paul Whiteman of Colored Orchestras”⁷ among the (white) audiences who drove the sales and commercial direction of jazz.

The point of *Shaping Jazz* is that the context of the production of the recording is an important factor in understanding a recording's appeal. Sociological congruence is the mechanism that explains how the context of production affects the appeal of recordings. From the perspective of the receiver, the more congruence the context of production has with other characteristics of the song (who is performing it, the instruments used, how the song is titled, etc.), the more appealing the song. I am leaving for another book the dynamic understandings of jazz history, as well as how the national identity around culture and aesthetic taste affects what we see as congruent. In *Shaping Jazz* I will focus most of my analysis on the period 1917–33, with an emphasis on how congruence rooted in that period influenced the long-run appeal of individual recordings.

UNCOVERING CONGRUENCE, ONE PUZZLE AT A TIME

I demonstrate the import of the context of production and the mechanism of sociological convergence through the examination of six puzzles. While each puzzle is distinct, they present aspects of my thesis and evidence, which ultimately lead to a fuller understanding of how jazz was shaped. The first three puzzles relate to the role of geography.

In chapter 1, I begin by asking why it matters that jazz was produced in sixty-seven cities worldwide. That is, jazz up to 1933 was primarily recorded in a small set of cities, including Chicago, London, and New York. Does it even matter that in understanding the evolving market for jazz, and the music that formed the market center, that we also pay attention to jazz recordings from more disconnected cities such as Minneapolis (Minnesota), Hilversum (Holland), Sydney (Australia), Buenos Aires (Argentina), and Calcutta (India)? The answer, through understanding the mobility network of musicians across these cities, is a resounding “yes,” but that is just the beginning. The real puzzle is why there seems to be a disproportionate advantage for recordings that emerged from these more disconnected cities than when compared to the more central cities like New York.

As is often the case, solving this puzzle gave birth to additional questions. Although I could identify how a city’s structural position in the network of musician mobility mattered, the mechanism that firmly linked the city’s structural position to long-run appeal was less clear. My model requires that musicians years after the original recording would have access to the information about where and when the original recording took place. This naturally leads to such questions as, “How could a musician in 1950 know that ‘Milenburg Joys’ was originally recorded on the Gennett label in Richmond, Indiana, in 1923?” In other words, the results of chapter 1 lead one to ask whether more can be understood about the process of diffusion that led to long-run appeal for jazz from a highly disconnected source. Tackling these questions is the main task of chapter 2.

An additional puzzle arose because my chapter 1 model explains the results of nearly every city with one exception: Berlin. Thus chapter 3 explores why Berlin is such a singular exception. A close examination of this question led me to jazz archives in Germany, which yielded fascinating and unexpected results that enrich our understanding of the relationship between the context of production, sociological congruence, and cultural product appeal. Not only is German jazz better understood, but this research adds insight into how the legitimacy of certain styles of jazz has varied over time.

The remaining three chapters focus on record companies and labels as the context of production. Chapter 4 examines why the firms that introduced a type of recorded jazz that was successful switch to champion another type of jazz that was less successful. Incumbent firms were first movers in recording illegitimate (but profitable) jazz. However, they distanced themselves from this type of jazz and

responded to elite anti-jazz pressure by inserting symphonic elements into the original form. In chapter 4, I focus on the role of the cultural elite and their attack on jazz and its producers. The firms that had incongruence with respect to their social structural position and jazz feared being penalized (incurring a loss of status and legitimacy). Using both qualitative historical and quantitative analyses, I show that firms founded in the years when classical music dominated the market for recordings (Victorian-era firms) were less improvisational and minimized their association with jazz's low-status racial and stylistic elements.

Chapter 5 examines what was perhaps the most perplexing of the puzzles that I encountered in trying to understand the market for early jazz recordings. In the course of examining the discographies, I found that many recordings were re-released by the same record company under a pseudonym. For example, a recording under the name the Wisconsin Roof Orchestra was re-released by the same firm as Miami Society Orchestra. King Oliver and his Dixie Syncopators was re-released as the Aurora Aristocrats. In fact, pseudonyms were used in 13% of all recordings in my discographical sample. And while one common explanation is that competitors wishing to profit from the original recordings of the focal firm created pseudonyms, 85% of pseudonyms in my sample were created by the same firm. Only 8% of pseudonyms were created by competitors. Herein lies the puzzle: Why these pseudonyms? The solution reveals particularly important information about the operation and organization of the early market and requires a deeper understanding of firm identity than was uncovered in chapter 4. This deeper understanding ends in an interesting answer that involves evidence of deception by incumbent jazz record companies, which actively sought congruence between their identity and the characteristics of their products and deceived observers into believing that their production of cultural products was consistent with their Victorian-era identity.

The final empirical chapter, chapter 6, focuses most intently on the narratives of cultural products, in particular on the identities of the individual recordings and groups in concert with the identities of record companies and labels. This chapter is not so much a puzzle but an opportunity to link the role of product descriptions mentioned at the outset of this book with the findings of the subsequent chapters. In this way, chapter 6 serves as a transition to the conclusion, where I outline the implications of my research for a conceptual model of product appeal in emerging markets in which meaning and value are dynamically constructed. Specifically, chapter 6 examines the significance of whether a recording's originators and early adopters are of the same or different race. This is done by determining whether a tune or song with black originators and white early adopters had different long-run appeal than one in which the originators were white and the early adopters black. What about the long-run appeal of songs whose originators and early adopters are of the same race? The answer and the rationale behind it cannot be understood without also examining the record companies as-

sociated with originators; this finding in turn helps propose a new means for capturing the building blocks of genres.

In chapter 7, the concluding chapter, I use smooth jazz as a way to capture some of the implications of *Shaping Jazz* for our current market for commercialized jazz. I then use this discussion to synthesize each of the chapters to provide general statements and propositions for the organization of recorded jazz and other markets, as well as to consider some limitations. I close the book with a discussion on how these insights apply not only to other theories on market categories, positions, and identities but also to other markets where boundaries and notions of quality are dynamic and where novelty is rewarded. I pay particular attention to the markets for nanotechnology and green technology. Finally, I reengage the market for bottled water.

A METHODOLOGICAL NOTE

Uncovering the role of sociological congruence required drawing upon my examination of multiple discographies, as well as archival material from the Chicago Jazz Archive, Jazzinstitut Darmstadt (the largest public jazz archive in Europe), and the Stanford Archive of Recorded Sound. I was able to access oral histories, sheet music, record label data, advertising and marketing information, and so forth. In addition to purchasing recordings from collectors and vintage record stores, I also benefited from online sources (www.redhotjazz.org and www.centerforjazzarts.org). I read musician autobiographies, articles on jazz from dozens of local and national newspapers, and related material in other popular and trade press publications (e.g., *Ladies Home Journal*, *Etude*),⁸ which further helped me understand the characteristics of jazz during the 1920s and 1930s. Finally, I was able to have enriching conversations with musicians and consumers who were teenagers during that period.

At the most aggregated level, these data were employed to analyze jazz from sixty-seven cities across five continents. However, I also examined recorded jazz from specific regions, such as jazz from the U.S. Midwest and Germany to obtain deeper explanatory power. I listened to and analyzed thousands of individual recordings. This quantitative analysis was largely made possible by directories on record companies and discography data contained in the Brian Rust (1969) and Tom Lord discographies (2005, 2010). The Lord discography (2010) is an electronic database (building on Rust's 1969 work) that provides information on the record labels of over 38,000 band leaders, 195,000 recording sessions, 1,111,000 musician entries, and 1,190,000 tune entries. Much of my analysis, however, is from 1917 to 1933. An online version of the discography is available from <http://www.lordisco.com/tjdonline.html>.

One substantial advantage of these discographies is their near completeness. These data are quite amazing, as they include not only recordings released but also those recorded and rejected. Rare errors are typically found by expert online communities of aficionados and collectors, and these communities helped me check and modify my sample. In general, the discography captures critical data for my analysis: titles of each recording, recording dates, record company/label, group leader, and musician names, as well as the instruments played. The discography also keeps track of critical details such as artist and group pseudonyms. All of these data exist in a database for much of the quantitative analysis.

I employ these data in various ways, but when doing quantitative analyses for this project (where the nature of the data makes the direction of effects more reliable than the point estimates) I employed the inferential power of interaction effects instead of relying simply on main effects. The main effects, such as the statistical relationship between a network position of a city and the appeal of the music from that city, are subject to more alternative explanations than I can probably imagine (and I have imagined many). Rather, I draw on the inferential power of specifying under what conditions the established effect (e.g., the city's network position) matters to better establish *why* it matters. Determining what interaction terms to include is driven by the historical context and institutional detail that my colleagues and I have uncovered. Except for chapter 5 (on the role of pseudonyms), the theoretical statements are based first on a close reading of the historical context, then followed by quantitative analyses that attempt to demonstrate the more historical qualitative investigation.

Finally, to enhance the coherence of *Shaping Jazz*, I employ an appendix to minimize the cumbersome tables of quantitative analyses in the main text of the book. Where the analysis was previously done in a journal article (chapters 5 and 6) I refer instead to the analyses in the respective article. Tables for the quantitative analyses for chapters 1, 2, 3, and 4 are in the appendix.

In the end, I hope that *Shaping Jazz* evokes a fraction of the excitement involved in writing it.