

LUMINATE

THE GREAT ESCAPE  
16 MAY 2024 - 10AM

**The UK Music Landscape:  
Music Consumption Trends,  
Fans and Overseas Success**

# Intro

**Helena  
Kosinski**  
VP, Global



# Agenda

- Who is Luminate?
- What role does UK music play in the world?
- What makes our British fans wonderful and unique?
- What opportunities could we be missing?

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**Who is  
Luminate?**

# Luminate

The trusted independent leader in music consumption and audience intelligence



**Consumption**



**Consumer  
Insights**



**Global  
Intelligence**



Luminate is the official data provider to Billboard for charts in the U.S., Canada & Globally



# Global, Regional and Country Level Insights

## Global Coverage in 2024

### North America

- U.S.
- Canada

### Latin America

- Argentina
- Brazil
- Bolivia
- Colombia
- Chile
- Ecuador
- Mexico
- Peru

### Middle East, Turkey & Africa

- Egypt
- Kenya
- Nigeria
- Saudi Arabia
- South Africa
- Turkey
- UAE

### Nordics

- Denmark
- Finland
- Iceland
- Norway
- Sweden

### Western Europe

- Austria
- Belgium
- France
- Germany
- Ireland
- Italy
- Luxembourg
- Netherlands
- Portugal
- Spain
- Switzerland
- U.K.

### Eastern Europe

- Croatia
- Czechia
- Poland

### South East Asia

- Indonesia
- Malaysia
- Philippines
- Singapore
- Thailand
- Vietnam

### Australasia

- Australia
- New Zealand

### East Asia

- Hong Kong
- Japan
- Republic of Korea
- Taiwan

### South Asia

- India

# The New Luminate Platform



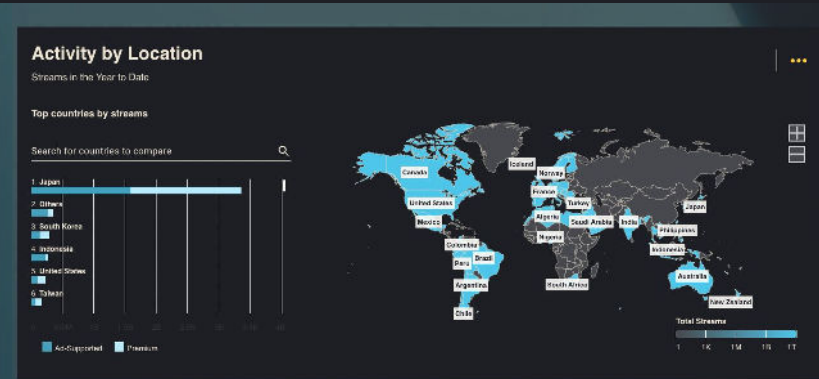
Reimagined user interface



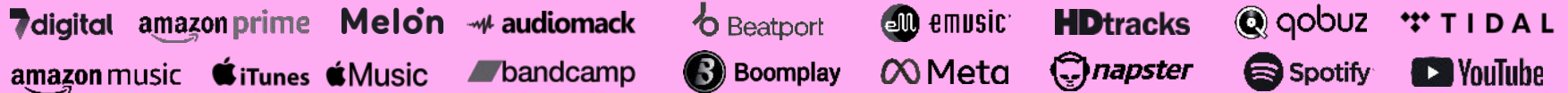
More global data partners



Faster processing for more powerful insights



## Data Providers



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**What Role Does  
UK Music Play  
in the World?**

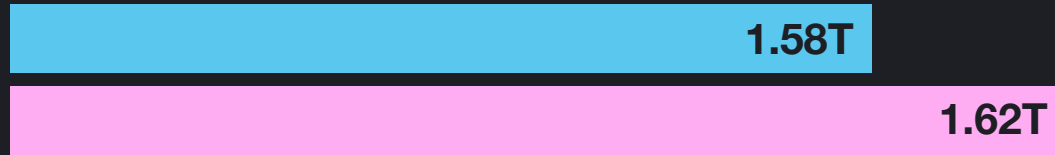
# Global & UK Streaming in Q1 2024

(Week 1-13 2024)

■ Q1 2023

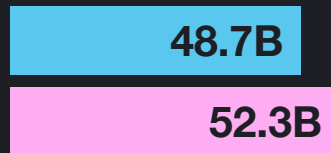
■ Q1 2024

## Global Total On-Demand (Audio + Video) Song Streams



**+2.4%**  
Vol. Change

## UK Total On-Demand (Audio + Video) Song Streams



**+7.4%**  
Vol. Change




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\* SEA (STREAM-EQUIVALENT ALBUMS): 1,250 PREMIUM STREAMS = ONE ALBUM // 3,750 AD-SUPPORTED STREAMS = ONE ALBUM; TEA (TRACK-EQUIVALENT ALBUMS): 10 DIGITAL TRACKS = ONE ALBUM  
\*\* CATALOG = 18 MONTHS OR OLDER AND HAVE FALLEN BELOW NO. 100 ON THE BILLBOARD 200 CHART AND DON'T HAVE A SINGLE FROM THE ALBUM THAT IS CURRENT ON ANY OF BILLBOARD'S RADIO AIRPLAY CHARTS

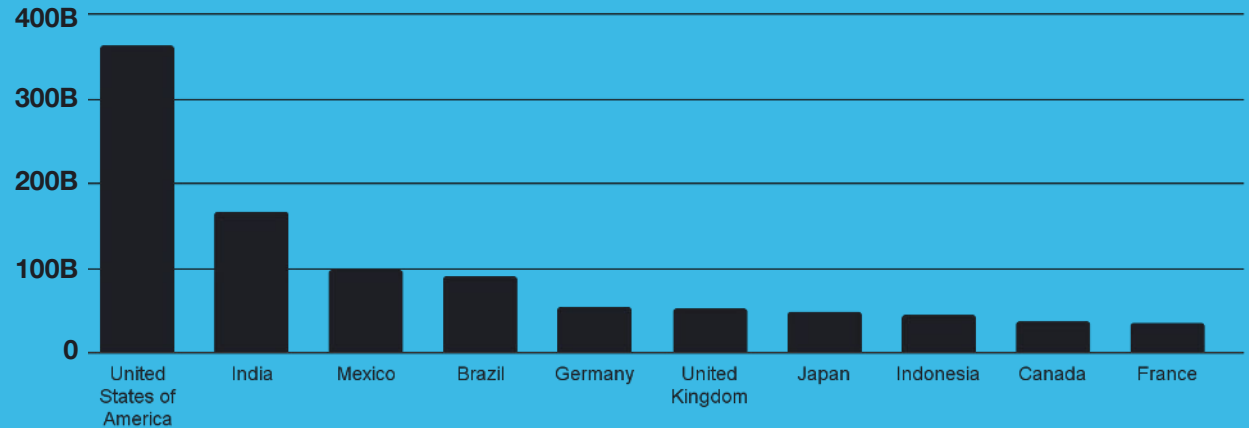
+THROUGH WEEK 13

# Globally, the UK is the 6th Biggest Streaming Market

This is up one spot from Q1 2023 when the UK ranked 7th

IFPI TOP 10 MUSIC MARKETS 2023		
1	United States	
2	Japan	
3	UK	
4	Germany	
5	China	
6	France	
7	South Korea	
8	Canada	
9	Brazil	
10	Australia	

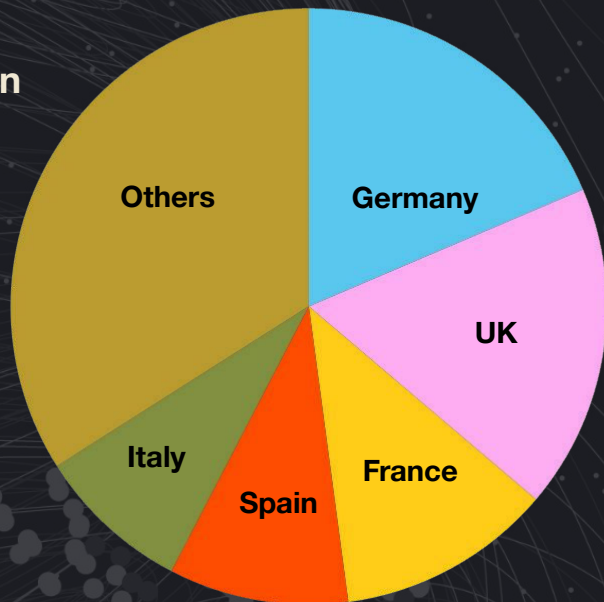
## Q1 2024 Top 10 Total On-Demand (Audio + Video) Streaming Markets by Volume



# UK #2 in Europe by Streaming Volume

The UK makes up a little more of European streams that it did at this point last year

Q1 2024  
European  
Share of  
Streams



**17.6%**

UK share of total streams up slightly from 17.4% YoY

UK streaming numbers grows at slightly higher rate than the rest of Europe (+5.8%)

# Where UK Artists are Streamed the Most

Outside of the UK, Ireland has the highest concentration of Top UK artist streams while the U.S. ranks 29th

## Q1 2024 Total On-Demand (Audio + Video)

Streaming Share Of The Top 200 UK Artists In Individual Countries

RANK	COUNTRY	REGION
1	Ireland	Europe
2	Australia	Australasia
3	New Zealand	Australasia
4	Netherlands	Europe
5	Iceland	Europe
6	Denmark	Europe
7	Belgium	Europe
8	Norway	Europe
9	Czech Republic	Europe
10	Luxembourg	Europe
21	Italy	Europe
26	Germany	Europe
27	France	Europe
29	US	North America







# Global Hit Score - What Is It?

A metric to measure a song's popularity across multiple countries using:

1. Streaming volume
2. Rank of the song in each country
3. Streaming size of each country

# Global European Hit Score

Dua Lipa's "Houdini" ranks #5 while songs from Sophie Ellis-Bextor, Kenya Grace and Tom Odell also rank in the Top 10 Most Successful Pan-European Hits in 2024 so far

GLOBAL HIT SCORE - EUROPE FILTER SONG RANK	TITLE	ARTIST	ARTIST COUNTRY OF ORIGIN	GLOBAL HIT SCORE - EUROPE FILTER
1	"Beautiful Things"	Benson Boone	United States	49.84
2	"Lose Control"	Teddy Swims	United States	48.99
3	"greedy"	Tate McRae	Canada	48.06
4	"Lovin On Me"	Jack Harlow	United States	41.22
5	"Houdini"	Dua Lipa	United Kingdom	40.88
6	"Murder On The Dancefloor"	Sophie Ellis-Bextor	United Kingdom	40.54
7	"Strangers"	Kenya Grace	United Kingdom	39.25
8	"Vois sur ton chemin"	BENNETT	Germany	38.71
9	"yes, and?"	Ariana Grande	United States	38.10
10	"Another Love"	Tom Odell	United Kingdom	37.29



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SOURCE: LUMINATE MUSIC CONSUMPTION DATA  
GRACE: MICHELLE HÉLENA JANSSEN  
DUA LIPA: TYRONE LEBON; ELLIS-BEXTOR: ALBERTO RODRIGUEZ

# Top Pan-European UK artists of Q1

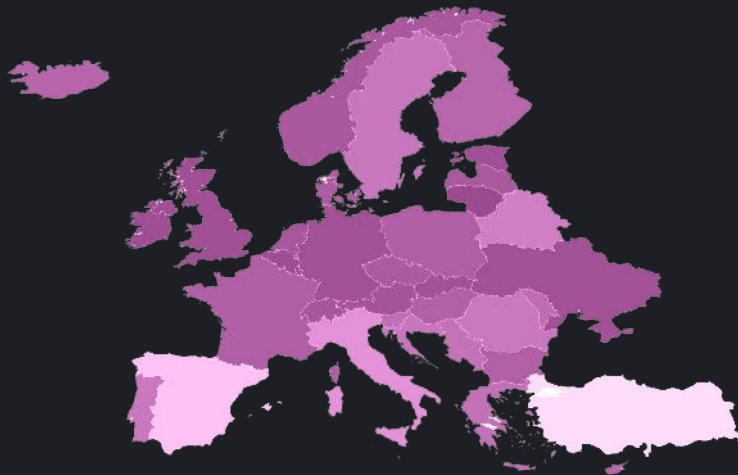
*Kenya Grace* has consistent consumption across almost all of Europe, whereas *D-Block Europe* is especially concentrated in Germany, Benelux and the Nordics

THE DARKER THE COLOUR, THE HIGHER THE STREAMING RANK IN EACH COUNTRY

## D-Block Europe



## Kenya Grace



# U.S. Leads the List of Countries Which Deliver the Most Globally Successful Artists - but UK is #2

(Global Hit Score Artists)



**63%**

of artists from the U.S. in the Top 350 artists (220)



**10%**

of artists from the UK in the Top 350 artists (35)



**5%**

of artists from South Korea in the Top 350 artists (16)

The Beatles

Adele

Harry Styles

Elton John

Dua Lipa

Ed Sheeran

SOURCE: LUMINATE CONSUMPTION DATA  
STYLES: HANNA MOON; SHEERAN: ANNIE LEIBOVITZ;  
THE BEATLES: SAL TRAINA/FAIRCHILD PUBLISHING;  
ADELE: MICHAEL BUCKNER; JOHN AND LIPA: PEGGY SIROTA

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**What Makes our Fans  
Wonderful and Unique?**

# UK Genre Streaming Share - Q1 2024

R&B/Hip-Hop is the genre-share leader while the Top 7 genres make up 90.3% of genres streamed in the UK

## UK Genre Streaming Share Q1 2024

All Others

9.7%

Soundtrack

2.8%

Country & Folk

2.9%

Alternative

4.7%

Electronic / Dance

11.2%

Rock

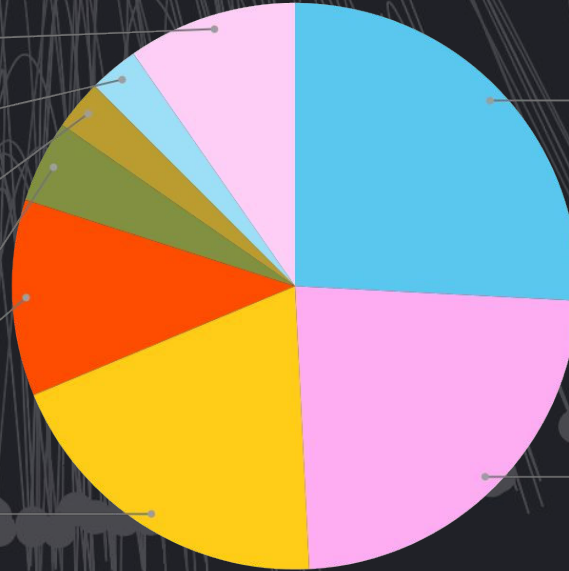
19.5%

R&B/Hip-Hop

25.8%

Pop

23.4%



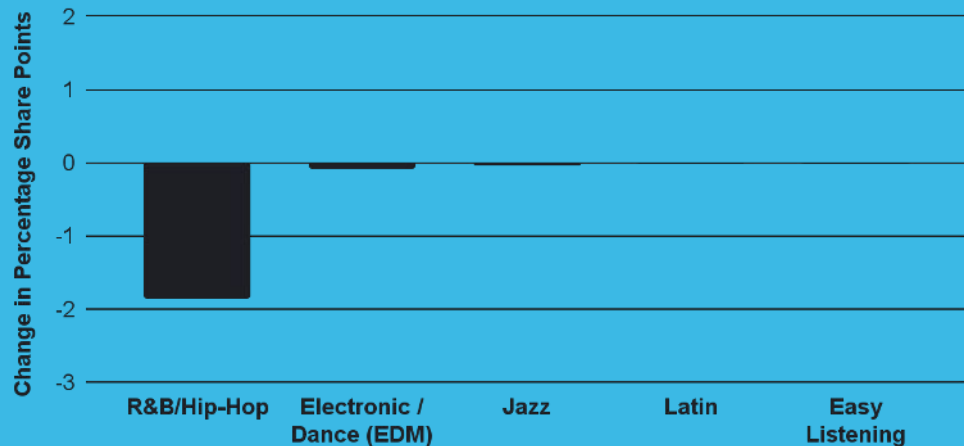


# Comparatively, R&B/Hip-Hop Lost the Most Share

Though it is still the largest genre in terms of Total On-Demand (Audio + Video) streaming volume, R&B/Hip-Hop is down 1.2% in streaming volume in the UK compared to Q1 2023, causing it to drop -1.86 percentage share points in genre streaming

## 5 Slowest Growing Genres in Terms of Streaming Share

UK Q1 2024 vs Q1 2023

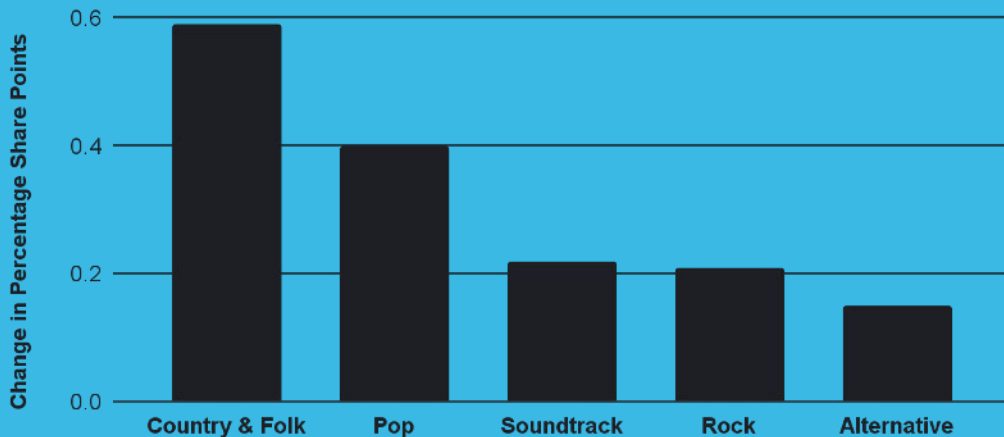




# Fastest Growing Genres in the UK

Country & Folk is the fastest growing genre with +33.6% Total On-Demand Streaming over Q1 2023. The genre also increased its share of streaming against all others by +.59 percentage share points for the largest increase

## 5 Fastest Growing Genres in Terms of Streaming Share UK Q1 2024 vs Q1 2023





# Country Music Listener Profile

Country music streamers in the UK spend an average of 55 hours per month with music, which is 25% more than the average UK listener

**21%**

Of Music Streamers in the UK listen to Country music monthly



**Music Discovery:** The primary methods of music discovery are through Friends and Family and Audio/Video Streaming Services (tie, 52%)



**Global Engagement:** 80% of Country Music Fans in the UK engage with artists from other countries



**Live Music Attendance:** 61% of Country Music Fans that stream music in the UK have attended a live music event in the past 12 months

# Genres More Likely to be Streamed in the UK, U.S. and Europe

(Total On-Demand Streaming; Q1 2024)

	Total Europe Streaming Share	US Streaming Share	UK Streaming Share
Country & Folk	1.1%	<b>7.69%</b>	2.38%
Religious	0.5%	<b>2.02%</b>	0.79%
Reggae	0.6%	0.55%	<b>0.90%</b>
Punk	1.1%	1.66%	<b>1.70%</b>
Easy Listening	0.2%	0.25%	<b>0.29%</b>



## Representing the anarchic Punk spirit:

UK Punk Fans are less likely to respond that they "listen to music to stay plugged into popular culture and the broader world of entertainment"



**A desire for community:** UK Reggae Fans are 50% more likely to respond that they "listen to specific artists because I like to participate in the community it provides"



**Outward Expression:** UK Christian/Gospel Fans are 65% more likely to respond that they "wish artists provided more merchandise options so that I can show my support for them and their work"

# The UK streams more of these genres than Europe – and those fans are likely to be Super Fans



**25%**

of UK Punk fans  
can be identified  
as super fans



**20%**

of UK Christian/Gospel  
fans can be identified  
as super fans



**28%**

of UK Reggae fans  
can be identified  
as super fans

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**What Opportunities  
Could We Be Missing?**

# Nurturing Home Grown Talent Where There Is Clearly a Market for Country/Folk Artists

While the Top 3 Country artists in the UK are from the U.S., some UK Country artists are finding success in other territories as well

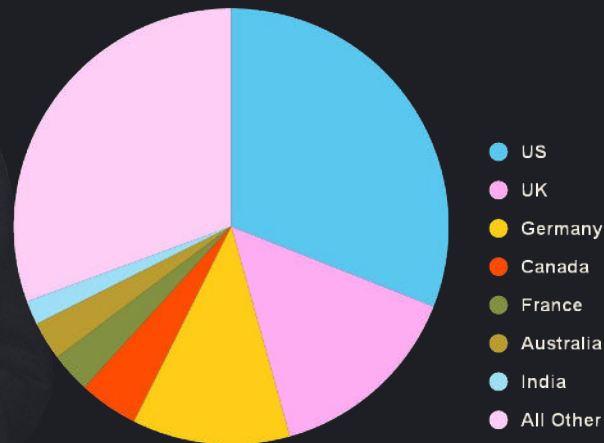
RANK	TOP COUNTRY ARTISTS IN THE UK
1	Taylor Swift (Early Country Songs)
2	Zach Bryan
3	Luke Combs
4	Morgan Wallen
5	Chris Stapleton

RANK	TOP BRITISH COUNTRY / FOLK ARTISTS
14	Nathan Evans
19	Cat Stevens
23	David Gray
44	Nick Drake
89	Dylan John Thomas



Nathan Evans

Nathan Evans Total On-Demand (Audio + Video) Streaming Share  
2/1/24 to Current



# Satisfy the Fans' Merch (and Live) Desires

Missed opportunities to give the fans what they want



**+212%**

**UK Christian / Gospel fans** report spending 12.67 per week on livestream music events, which is 212% more than the average UK music listener



**+83%**

**UK Punk fans** report spending 83% more on artist merch when compared to the average UK listener



**+45%**

**UK Reggae fans** are 45% more likely to report that they "wish artists provided more merchandise options so that I can show my support for them and their work" than the average UK listener



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**Double Down on Getting  
the Creators Paid –  
Focus on the Metadata**

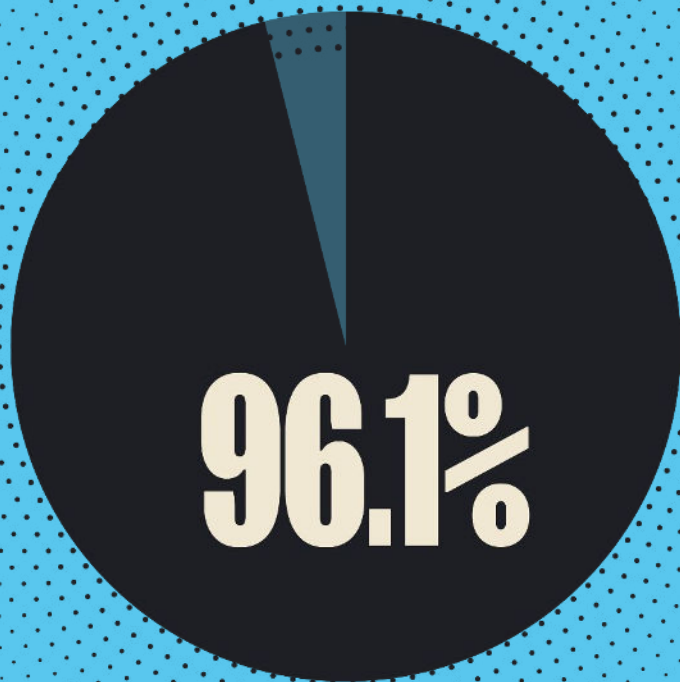
# Average Daily ISRC Delivery to DSPs

There was an average of 103.5K new ISRCs delivered to DSPs each day in 2023, which is up 10.8% from 2022 when there was an average of 93.4K delivered each day

■ Major Distribution

■ Rest of Industry\*

\*INCLUSIVE OF INDEPENDENT DISTRIBUTION AND DSPS THAT CATER TO CREATOR NETWORK

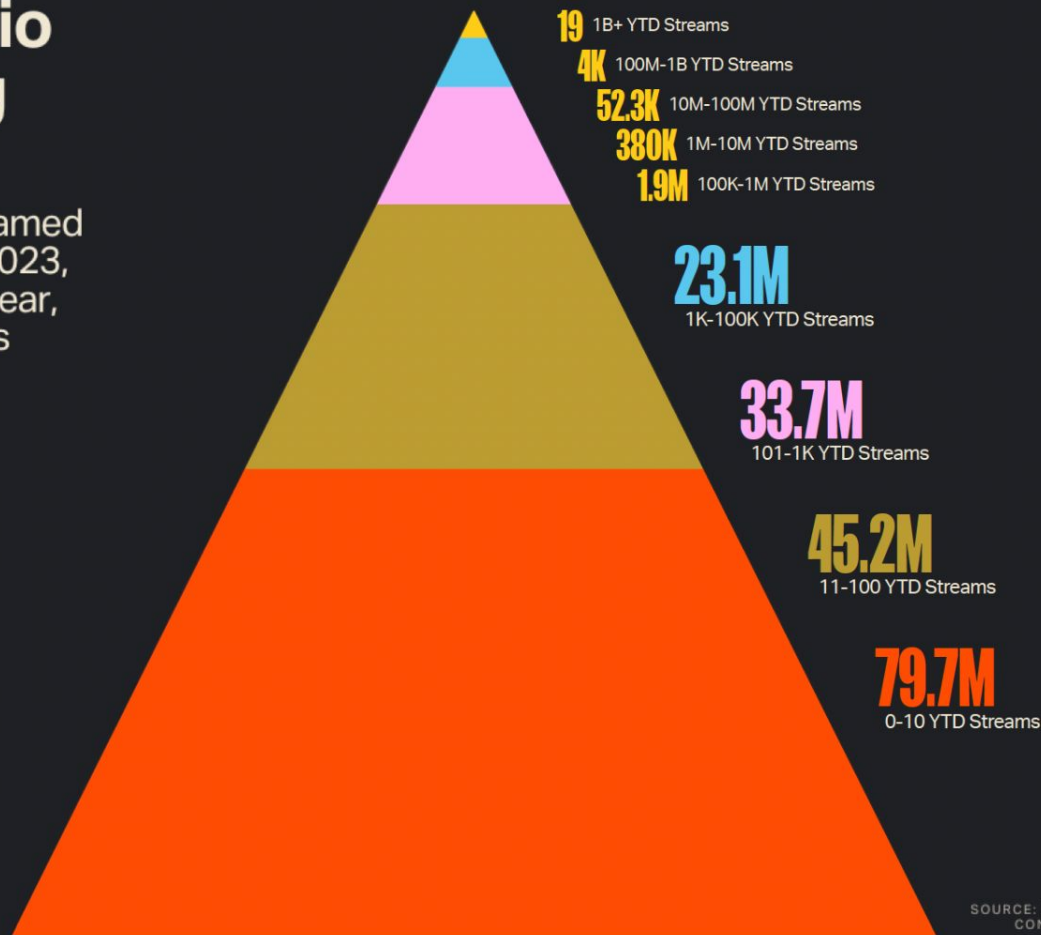


# 2023 Global Audio Track Streaming Pyramid

436K tracks (ISRCs) were streamed 1M or more times Globally in 2023, up from 373.5K in 2022; This year, 45.6M tracks had zero streams

# 184M

Total Audio ISRCs Tracked



# Difficulties Identifying the Proper Rights Holders

Everybody has the right to be named Drake and everyone has the right to create a song called “One Dance”

## Top Results



Drake  
Canadian rapper  
Type: Person  
Gender: Male  
Nationality: CA



Drake  
Chilean heavy metal band  
Type: Band  
Nationality: CL

## Other Results



Drake  
Jason Drake  
Type: Person  
Gender: Male  
Nationality:



Julius Drake  
English pianist  
Type: Person  
Gender: Male  
Nationality: GB



Grant Clarke  
American songwriter (1891-1931)  
Type: Person  
Gender: Male  
Nationality: US



Bob Drake  
Musician, recording engineer  
Type: Person  
Gender: Male  
Nationality: US



Alfred Drake  
American actor (1914-1992)  
Type: Person  
Gender: Male  
Nationality: US



Susan Drake  
Classical harpist, born in Cardiff, Wales. Her marriage to ...  
Type: Person  
Gender: Female  
Nationality: GB



Ervin Drake  
Songwriter  
Type: Person  
Gender: Male  
Nationality: US



Christopher Drake  
American score composer  
Type: Person  
Gender: Male  
Nationality: US



Nick Drake  
British singer-songwriter  
Type: Person  
Gender: Male  
Nationality: MM

There are [X] amount of artists using the below word or phrase in their artist name

Juju	68
Supernova	68
Joy	44
Wizard	40
Stress	39
Sunday	32
Cherry	31
Time	30
Gloria	25
Motion	22
Storm	14
Aphasia	10
The Arrows	7
Apotheosis	7
Ichor	5

Metadata challenges include international variations as well as composer name and key identifiers

Artist: **Drake** ⓘ  
*Canadian rapper*



**Information**

**Type:** Person  
**Gender:** Male  
**Nationality:** CA  
**Date of Birth:** 1986-10-24  
**Date of Death:**

**Identifiers**

- **ISNI:** 0000 0001 2032 246X ⓘ
- **IP:** 00529397120 ⓘ
- **IPN:** 10566028 ⓘ
- **Discogs Id:** 151199 ⓘ
- **Musicbrainz Id:** 9fff2f8a-21e6-47de-a2b8-7f449929d43f ⓘ
- **Merged ISNI:** 0000000372929540 ⓘ +2

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**Relationships**
**Releases** (2086)
**Recordings** (1370)
**Works** (0)

**Also Known As:**

Aubrey Graham	Champagne Papi	Drakkardnoir	Drizzy
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**Is Member Of:**

Young Money
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**Name Variants**

德雷克 (zh)	AUBREY GRAHAM	درېك (ckb)	Aubrey Graham
Champagne Papi	Дреџкс	Drake K	ड्रेक
ဒေ့ဒရဲ (am)	C. Papi	ドレイク (ja)	דרייק (he)
ড্রেইক (bn)	درېك	Drake "Drizzy" Rogers	드레이크 (ko)
Դրէյք (hy)	Drake (musikant) (af)	A. Graham	Дрєк
ድራይክ (id)	Drake (歌手) (yue)	德雷克 (歌手) (wuu)	Дрєкс

# Key Takeaways

Nurturing  
home grown  
talent where  
there is clearly  
a market

Satisfy the  
fan's merch  
(and live)  
desires

Double down  
on getting the  
creators paid  
— focus on the  
metadata





# Questions?



## Scan to Download the Presentation

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Want to learn more about streaming  
and audiences in UK or elsewhere?  
Contact us:  
[hkosinski@luminatedata.com](mailto:hkosinski@luminatedata.com)

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The background features a complex network of thin white lines and semi-transparent white circles of varying sizes, creating a sense of depth and connectivity. The lines are mostly vertical and slightly curved, while the circles are scattered throughout, some appearing to be at the ends of the lines.

# Appendix



# Punk Fan Profile

25% of UK Punk Fans can be identified as Super Fans, making these fans 70% more likely to be Super Fans than the average UK music listener



## £31.70

UK Punk fans report spending 31.70 on music festivals, which is 115% than the average UK music listener (14.73)



## 127%

UK Punk fans are 127% more likely to report buying vinyl in the past 12 months when compared to the average UK listener



## 83%

UK Punk fans report spending 83% more likely on artist merch when compared to the average UK listener



# Reggae Fan Profile

28% of UK Reggae Fans can be identified as Super Fans, making these fans twice as likely to be Super Fans than the average UK music listener



# 16

UK Reggae fans report spending 16 hours per week engaging with music, which is 36% more than the average UK music listener (11.9 hours)



# £31.09

UK Reggae fans report spending 31.09 on music concerts, which is 59% more than the average UK music listener (19.57)



# +45%

UK Reggae fans are 45% more likely to report that they "wish artists provided more merchandise options so that I can show my support for them and their work" than the average UK listener





# Christian / Gospel Fan Profile

20% of UK Christian / Gospel Fans can be identified as Super Fans, making these fans 43% more likely to be Super Fans than the average UK music listener



## +212%

UK Christian / Gospel fans report spending 12.67 per week on livestream music events, which is 212% than the average UK music listener)



## +75%

UK Christian / Gospel fans report buying digital tracks than the average UK music listener



## +69%

UK Christian / Gospel fans are 69% more likely to report that they "wish artists provided more merchandise options so that I can show my support for them and their work" than the average UK listener