

LUMINATE



Insights Matter:
Music Insights for the
Global and Asia Pacific
Markets

All That Matters | September 2024

Introduction



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LUMINATE
SAN FRANCISCO / LOS ANGELES



Agenda

01 Who is Luminate?

02 State of Streaming

03 Local Artist Trends

04 Metadata Challenges (and Solutions)
for Royalty and Search



Who is Luminate?

Luminate

The trusted independent leader in entertainment consumption, audience intelligence and data management



**Consumption
Activity**



**Audience
Insights**



**Global
Intelligence**



**Data
Management**

In Good Company



What Data Are We Sharing Today?

Full Country Level Visibility Streaming and Digital Sales

Top 49 music revenue markets, including all key Asian markets — Japan, South Korea, Philippines, Indonesia, Malaysia, Thailand, Vietnam, Hong Kong, Singapore, Taiwan, India and Australia/New Zealand

Research Suite: More Audience Insights

Audience Insights into 30 countries including: Japan, South Korea, Philippines, Indonesia, Malaysia, Thailand, Vietnam and Singapore

Data Management and Matching

The world's Largest database Of musical identifiers, pairing artists and songwriters to their recordings and works

Digital Streaming Platform Data Partners Include



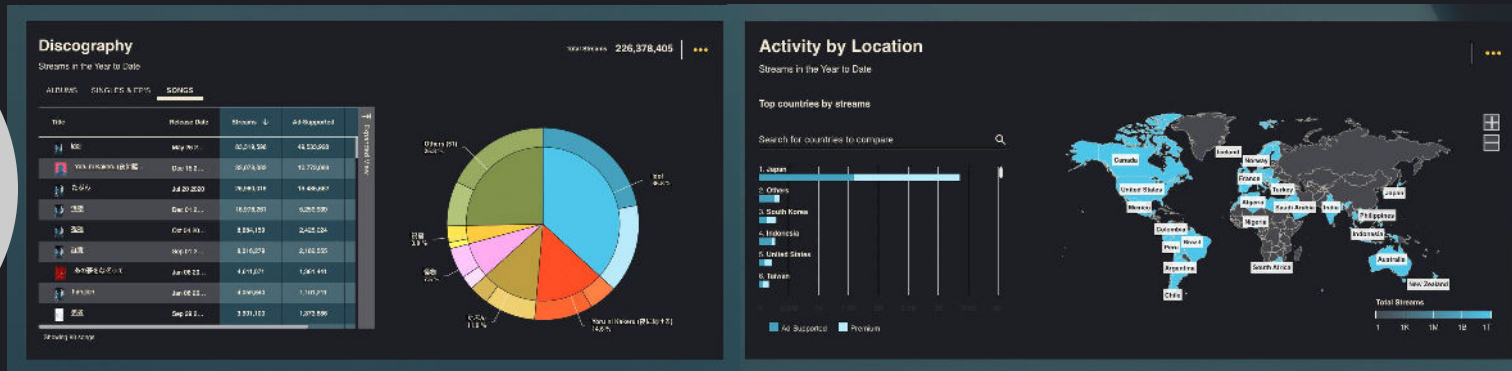
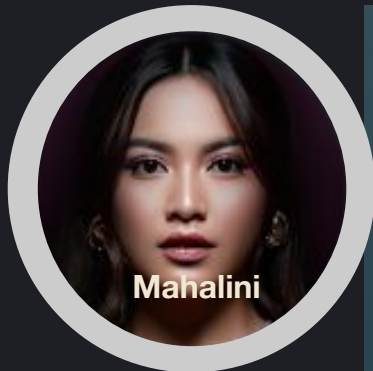
Luminate Next Gen Connect

01 Reimagined user interface

02 More global data partners

03 Faster processing for more powerful insights

Accessible by via UI, API or data share via Snowflake





State of Streaming

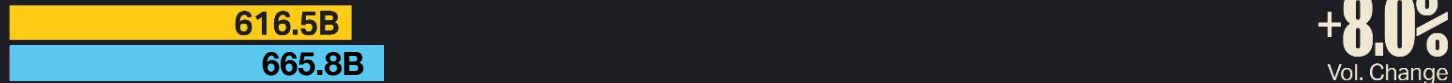
Global Metrics (1H 2024)

2023+ 2024+

Global On-Demand Streaming: Audio



U.S. On-Demand Streaming: Audio



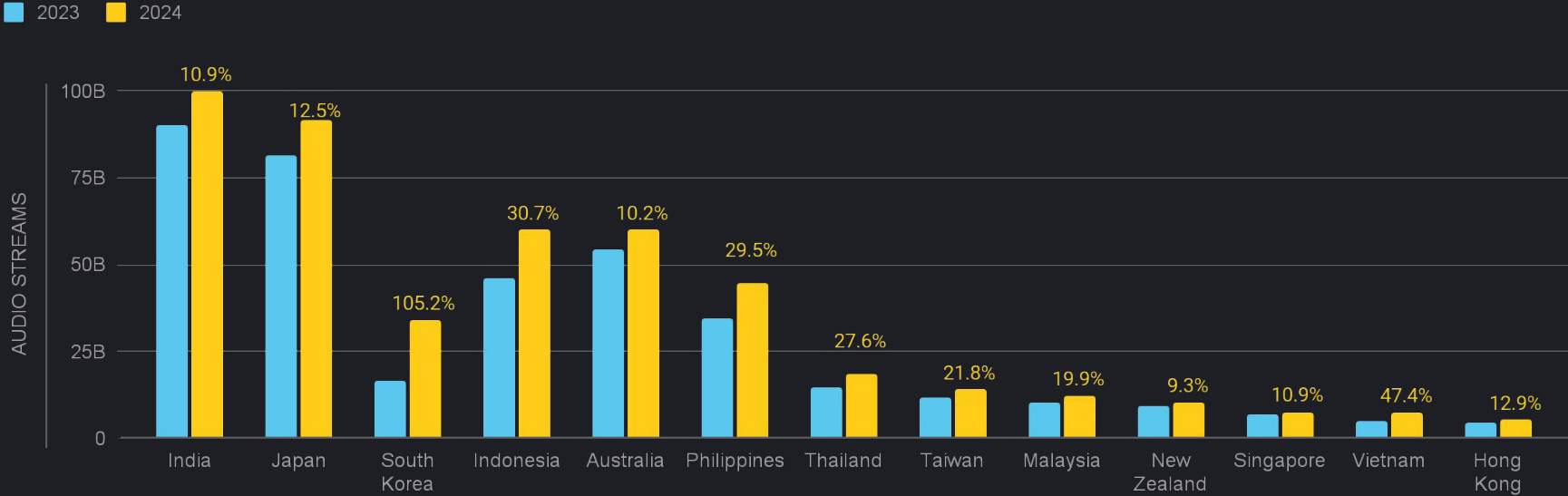
Ex-U.S. On-Demand Streaming: Audio



* SEA (STREAM-EQUIVALENT ALBUMS): 1250 PREMIUM STREAMS = ONE ALBUM // 3750 AD-SUPPORTED STREAMS = ONE ALBUM; TEA (TRACK-EQUIVALENT ALBUMS): 10 DIGITAL TRACKS = ONE ALBUM
+ 12/29/23 - 6/27/24 (AS COMPARED TO 12/30/22 - 6/29/23)
** CATALOG = OLDER THAN 18 MONTHS

Top Audio Streaming Markets - Asia & Australia/NZ

YTD AUG. 1, 2024 VS. YTD AUG. 3, 2023



LUMINATE MUSIC CONSUMPTION DATA *South Korea with 2024 addition of Melon vs 2023 without

Genres That Are Most Popular in Select Countries

Diverse listening habits are seen when looking at the genres that over or under index in different countries compare to their region

Indonesia

Philippines

Thailand

Japan

Australia

Indonesia

Top 3 Over-Indexing Genres

Top 3 Under-Indexing Genres

Punk

Traditional

Holiday/Seasonal

New Age

Alternative

Country & Folk

Compared to the rest of Asia

Genres That Are Most Popular in Select Countries

Diverse listening habits are seen when looking at the genres that over or under index in different countries compare to their region

Indonesia

Philippines

Thailand

Japan

Australia

The Philippines

Top 3 Over-Indexing Genres	Top 3 Under-Indexing Genres
Alternative (Deeper Dive: Indie Rock 2.56 index)	Traditional
Country & Folk	New Age
Religious	Classical

Compared to the rest of Asia

Genres That Are Most Popular in Select Countries

Diverse listening habits are seen when looking at the genres that over or under index in different countries compare to their region

Indonesia

Philippines

Thailand

Japan

Australia

Thailand	
Top 3 Over-Indexing Genres	Top 3 Under-Indexing Genres
Country & Folk Only Country & Folk Over-Indexes in Thailand compared to the rest of Asia	Religious
	New Age
	Reggae
<i>Compared to the rest of Asia</i>	

Top Country & Folk Artists in Thailand:

- 1. Taylor Swift *Red (Taylor's Version)*
- 1. Dìaw Ayùn
- 1. Meentra Intira
- 1. จ้าúč17
- 1. Mek Abhisit

Genres That Are Most Popular in Select Countries

Diverse listening habits are seen when looking at the genres that over or under index in different countries compare to their region

Indonesia

Philippines

Thailand

Japan

Australia

Japan

Top 3 Over-Indexing Genres

Jazz

Rock

Soundtrack

Top 3 Under-Indexing Genres

Religious

Traditional

Country & Folk

Compared to the rest of Asia

Genres That Are Most Popular in Select Countries

Diverse listening habits are seen when looking at the genres that over or under index in different countries compare to their region

Indonesia

Philippines

Thailand

Japan

Australia

Australia

Top 3 Over-Indexing Genres

Country & Folk

Alternative

Punk

Top 3 Under-Indexing Genres

Pop

Traditional

Holiday/Seasonal

Compared to the rest of AU/NZ

Which Generations Drive Streaming?

Younger listeners are driving audio streaming adoption

88%

of **Millennial Filipino music listeners** are music streamers

86%

of **Gen Z music listeners in Indonesia** are music streamers

68%

of **Gen Z music listeners in Japan** are music streamers

#1 Source of Music Discovery

How Music Streamers find new content

Video/Audio Streaming

78%

In Indonesia

Social Media

74%

In The Philippines

Television

52%

In Japan

Local Artist Trends

Who's Listening Where?

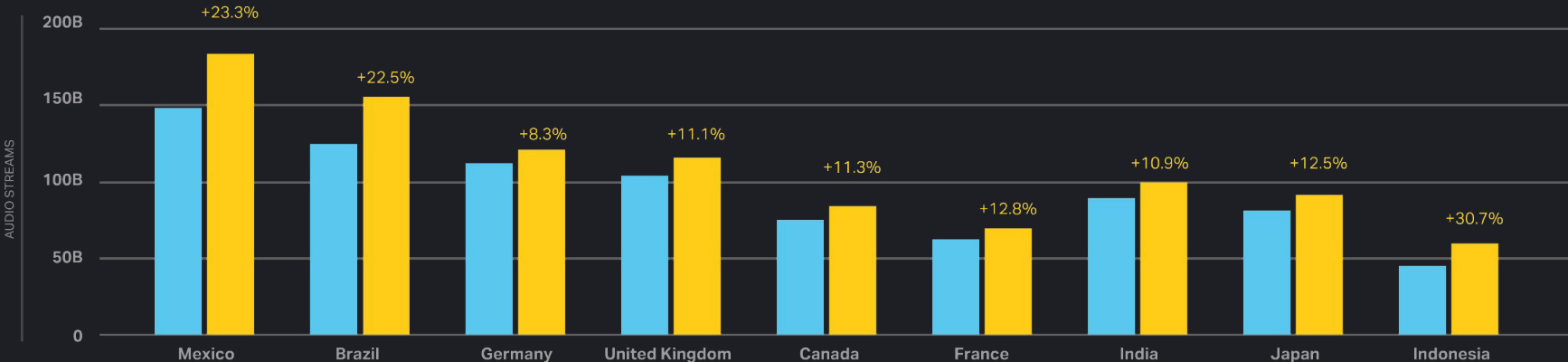


Top Global Audio Streaming Markets Ex-U.S.

India, Japan, Indonesia included in Global Top Markets

YTD AUG. 1, 2024 VS. YTD AUG. 3, 2023

2023 2024



LUMINATE MUSIC CONSUMPTION DATA

Asian Countries Vary Significantly With How Engaged They Are to Foreign Content

Percentage of Listeners Engaging With Music Content From Other Countries

95%

of **Filipino music listeners** engage with foreign content

74%

of **Singapore music listeners** engage with foreign content

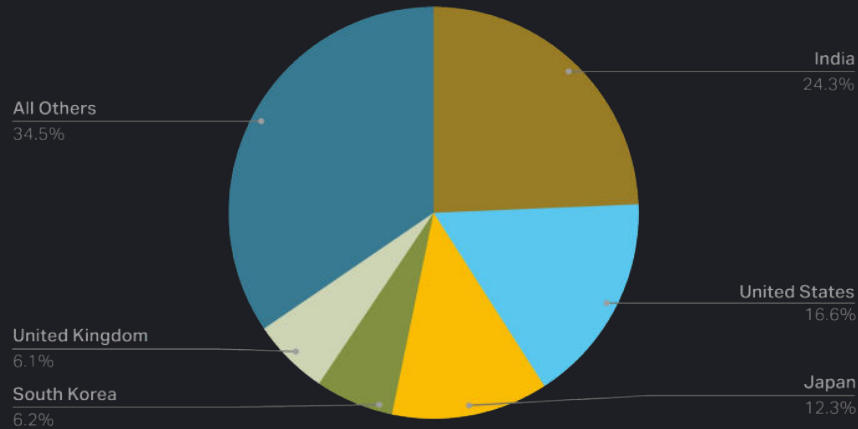
57%

of **Japanese music listeners** engage with foreign content

Top 10K Artist Streaming Share by Country of Origin: APAC + ANZ (Regional)

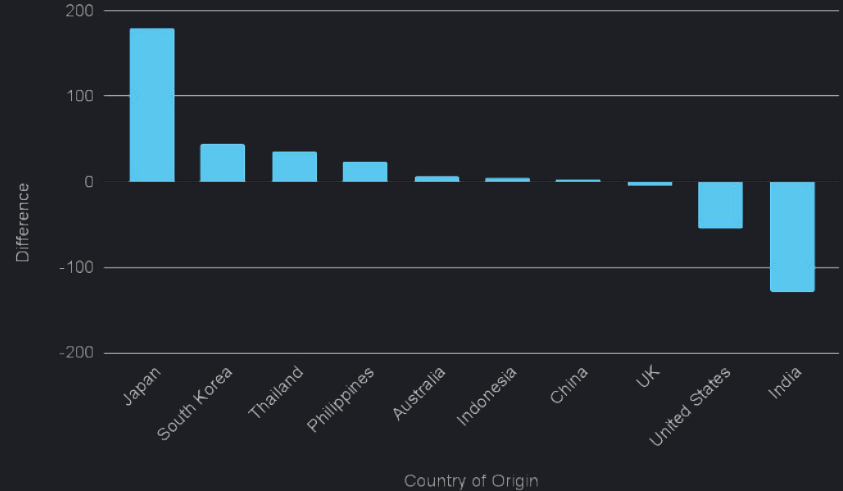
Artists from Japan gain the most through 2024 in total APAC + Australia/New Zealand streaming share (+5.3 share points) as 180 more Japanese artists are ranked in the regional Top 10K than last year

Share of APAC+ANZ Streaming Based on Artist Country of Origin YTD 2024 / Total On-Demand (Audio + Video) Streams



Change in Artist Country of Origin Count YTD 2024 vs FY 2023

Top 10k Artists in APAC + ANZ Total On-Demand (Audio + Video) Streams

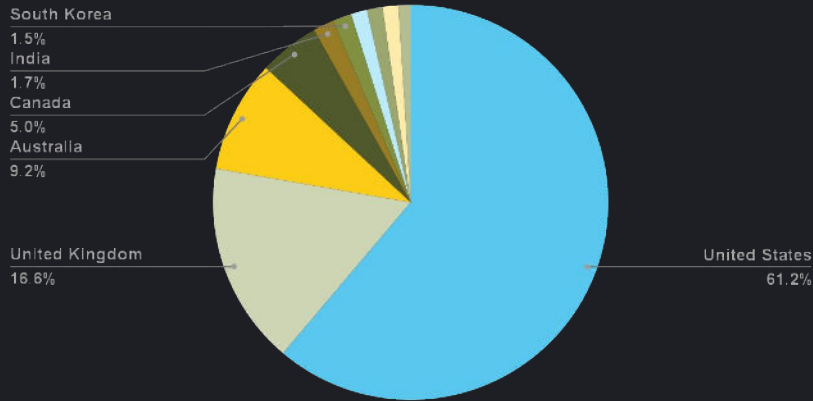


LUMINATE MUSIC CONSUMPTION DATA

Top 10K Artist Streaming Share by Country of Origin: Australia

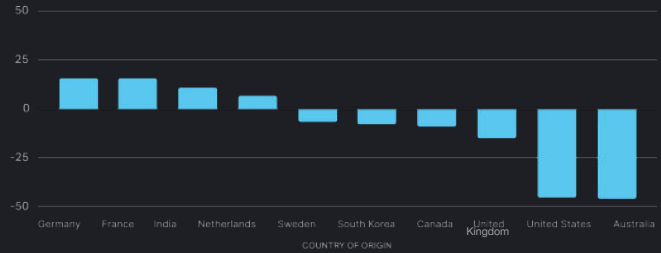
Artists from the United States are getting more popular (+2.1 streaming share points in 2024), but European artists are gaining more prominence throughout Australia's Top 10K Artist Rankings

Share of Australian Streaming Based on Artist Country of Origin
YTD 2024 / Total On-Demand (Audio + Video) Streams



Change in Artist Country of Origin Count YTD 2024 vs FY 2023

Top 10k Artists in Australia / Total On-Demand (Audio + Video) Streams



Top 5 German and French Artists in Australia

Rank	German Artists	French Artists
1	Milky Chance	David Guetta
2	Lunax	Daft Punk
3	Zedd	DJ Snake
4	Robin Schulz	M83
5	Rammstein	Bob Sinclar

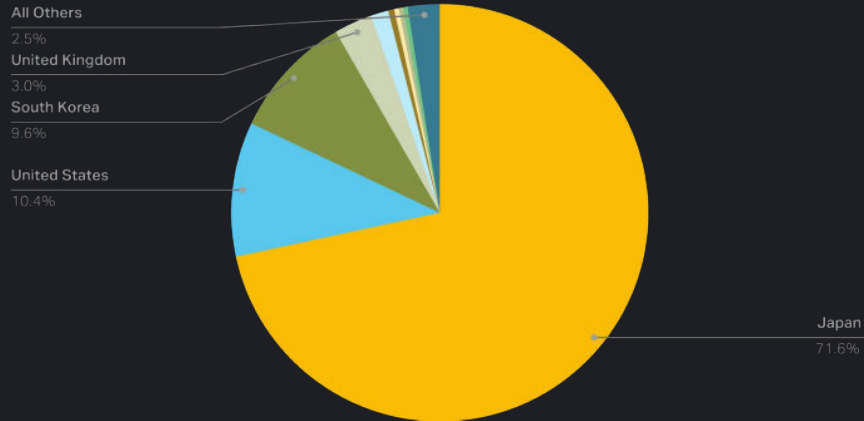
LUMINATE MUSIC CONSUMPTION DATA

Top 10K Artist Streaming Share by Country of Origin: Japan

Artists from South Korea gained the most streaming share (+.7 share points), but 247 more local Japanese artists are included in Japan's Top 10K Artist Rankings so far in 2024 while the U.S. loses the most

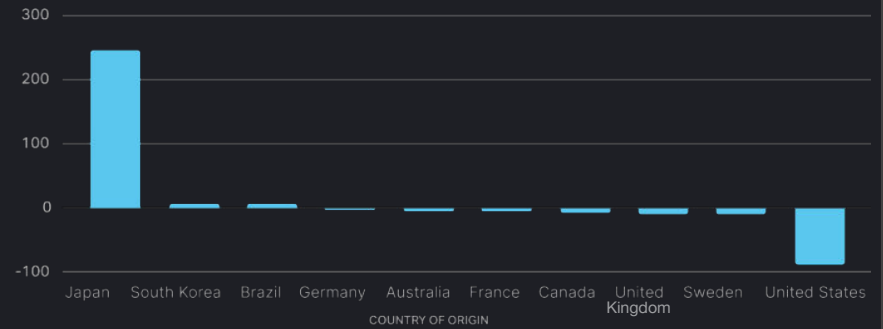
Share of Japan Streaming Based on Artist Country of Origin

YTD 2024 / Total On-Demand (Audio + Video) Streams



Change in Artist Country of Origin Count YTD 2024 vs FY 2023

Top 10k Artists in Japan / Total On-Demand (Audio + Video) Streams



LUMINATE MUSIC CONSUMPTION DATA

Who is the Young Japanese Music Fan?

Snapshot: The Gen Z Music Listener in Japan

Music Discovery

44% discover music on video and/or audio streaming services

Music & Social Media

+138% more likely to listen to music that their friends have posted than the average Japanese social media user

Engaging With Foreign Content

-27% less likely to listen to music by artists from other countries than the average Japanese music listener

SOURCE: LUMINATE INSIGHTS JAPAN MUSIC 360


Metadata Challenges (and Solutions) for Royalty and Search



Difficulties Identifying the Proper Rights Holders


Everybody has the right to be named LISA and everyone has the right to create a song called "MONEY"

Top Results




Lisa
Italian pop singer, aka Annalisa Panetta

Type: Person
Gender: Female
Nationality: IT




LISA
BLACKPINK

Type: Person
Gender: Female
Nationality: TH



Lisa
80s disco/synthpop/hi-nrg recording artist


Type: Person
Gender: Female
Nationality: US



LISA
Japanese pop/rock singer


Type: Person
Gender: Female
Nationality: JP

Other Results




Lisa Cates

Type: Person
Gender: Female
Nationality: US




Lisa & Lisa

Type: Person
Gender:
Nationality:




Lisa Lisa
Born 15 January 1966, New York City, New York

Type: Band
Nationality: US




Lisa Lisa

Type: Person
Gender:
Nationality:



Lisa Lisa

Type: Person
Gender:
Nationality:



Lisa Velez
American musician

Type: Person
Gender: Female
Nationality: US

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

Unmatched and Unclaimed Royalties

Example: In the U.S. more than \$1 out of every \$6 of mechanical royalties remains undistributed

Impact of Royalty Reprocessing (\$ in millions) As of March Distribution (see year in chart)	2021 USAGE			2022 USAGE	
	2022	2023	2024	2023	2024
Blanket Royalty Pools Processed by The MLC	\$674.0	\$674.0	\$674.0	\$738.5	\$738.5
Less Royalties for Voluntary Licenses	(\$98.2)	(\$100.7)	\$(101.8)	(\$39.2)	(\$40.0)
Blanket Royalties Collected by The MLC	\$575.8	\$573.3	\$572.2	\$699.3	\$698.5
Royalties Directly Distributed by The MLC	\$421.3	\$453.2	\$469.1	\$543.2	\$572.7
Royalties Pending Distribution	\$154.5	\$120.0	\$103.0	\$156.0	\$125.9
Total Blanket Royalties Distributed	\$519.5	\$553.9	\$570.9	\$582.5	\$612.6
<i>Year over Year Increase</i>		\$34.5	\$17.0		\$30.2
Royalties Directly Distributed by The MLC	\$421.2	\$447.4	\$462.6	\$540.3	\$568.8
Royalties Matched for Distribution by DSPs Under Voluntary Licenses	\$98.2	\$100.7	\$101.8	\$39.2	\$40.0
Royalties Matched to be Processed with Adjustments	\$0.1	\$5.8	\$6.5	\$2.9	\$3.9
Blanket Royalties Pending Distribution	\$154.5	\$120.0	\$103.0	\$156.0	\$125.9
<i>Year over Year Decrease</i>		\$34.5	\$17.0		\$30.2
Unmatched Royalties	\$91.8	\$63.6	\$53.8	\$87.4	\$67.1
Unclaimed Royalties	\$59.8	\$54.5	\$47.6	\$62.1	\$52.9
Matched Royalties on Hold	\$2.9	\$1.9	\$1.7	\$6.6	\$5.9

16.25%

\$120M USD - or 16.25% - of the royalty funds collected by The MLC in 2022 remains Unmatched or Unclaimed as of the March 2024 distribution, much of which could be International Revenues

Quansic: World's Largest Music Asset Identifier Database and Matching Service

230M+

Asset Identifiers

100M+

Recordings

22.5M+

Artist Identifiers

12.7M+

Releases

15M+

Artists

39.8M+

Works


SOURCE: LUMINATE QUANSIC DATA

Luminate's Quansic Data Management Service finds missing metadata and streaming activity

- Songwriter ISWC <-> Recording ISRC
- Artist disambiguation and linking
- Sends fixed data back to customer

Artist: **LISA**

BLACKPINK



Information

Type: Person
Gender: Female
Nationality: TH
Date of Birth: 1996-03-27
Date of Death:

Identifiers

- ISNE: 00000000502679579
- IPNI:
- IPNI:
- Discogs Id: 677306
- MusicBrainz Id: 3c6ed57f-5b1e-471a-86ca-79f557b4d2c
- Wikidata Id: Q28707663
- Apple Id: i563938668
- Spotify Id: 3LQNE8YnEt78uQ9c3ESct
- Deezer Id: 145068992
- Amazon Id: B08H4THN35
- Merged ISNE: 00000000467573073

Relationships **Releases** (180) **Recordings** (1) **Works** (0)

Also Known As: Lalisa Manobal

Is Member Of: BLACKPINK 青春有你2 Mentors

Name Variants

Lalisa	Lisa (abentaria) [eu]	Lisa (cantareata) [ro]	Lisa (cântăreaș) [ro]
ليسا (ليسا) [ar]	Lisa Manobal	LISA	ليسا
리사(리사) [ko]	Lisa (cantante) [ast]	リサ [ja]	리사 [he]
Lalisa Manobal [ky]	லிசா மனோபால் [th]	Лиса Манобал [hy]	ליסא מנובאל [em]
लिषा मनोबाल [hi]	ليسا منوبال [de]	ليسا منوبال [azb]	ليسا [ne]
ليسا	Lisa Manobal	Lalisa Manobal [en]	리사 [ko]

Case Study: Global Major Label Artist

Songwriter royalties on 3% of streaming were Unclaimed

Luminate estimates a minimum of \$64k USD in just Mechanical and Performance Royalties in the U.S. alone to be recovered (does not including ex-US streaming royalties)

SOURCE	ISRCs	TOTAL STREAMS	% OF TOTAL STREAMS
Anonymous PRO existing ISRCs claimed	1,239	12.3B	97%
ISRCs Unclaimed (cover versions, etc) using Quansic	215	349M	3%
TOTAL	1,454	12.6B	100%

Key Takeaways

Global streaming opportunities are growing - **worldwide audiences are embracing new content**


Younger audiences that drive streaming discover new artists via DSPs and social media- **target new technologies for new audiences**

Seven markets from APAC+ANZ are outperforming Global and Ex-US Audio streaming growth — **use country activity data to activate your growth plans**


Identifier usage is key to minimizing complex metadata issues in today's Global marketplace - **ensure all streaming activity and subsequent royalties are reporting correctly**

Special Offer for Asia Pacific Music Matters Music Companies

Drive your business with data! Luminate is proud to offer qualifying customers introductory preferred subscription pricing for access to the next generation Luminate music platform. [Click here to learn more.](#)

Artist: **LISA** 











BLACKPINK



Information

Type: Person
Gender: Female
Nationality: TH
Date of Birth: 1996-03-27
Date of Death:

Identifiers

- ISNI: 00000000502679579 
- IPNI: 
- Discogs ID: 677306 
- MusicBrainz ID: 3c6e627f-5b1e-471a-86ca-79f557b4d2c 
- Wikidata ID: Q28727663 
- Apple ID: I5E9X39668 
- Spotify ID: 3LQNE8YcPhn78uQ9c3E5Cf 
- Deezer ID: 145008982 
- Amazon ID: B08H4THN35 
- Merged ISNI: 00000000467573073 

Relationships **Releases** (180) **Recordings** (1) **Works** (0)

Also Known As: Lalisa Manoban

Is Member Of: BLACKPINK **青春有你(2 Mentors)**

Name Variants

Lalisa	Lisa (abenzaria) (eu)	Lisa (cantaresta) (ro)	Lisa (cântărești) (ro)
لیسا (اسمیتا) (ary)	Lisa Manoban	LISA	لیسا
리사(리사) (kor)	Lisa (cantante) (ast)	リサ (ja)	리사 (he)
Lalisa Manoban (ky)	லிசா மனோபன் (th)	लिशा मनीषा मनीषा (hy)	לישא מנשה מנשה (sem)
लिशा मनीषा (hi)	لیسا منوبان (de)	لیسا منوبان (azb)	لیسا (ne)
لیسا	Lisa Manoban	Lalisa Manoban (en)	리사 (ko)

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