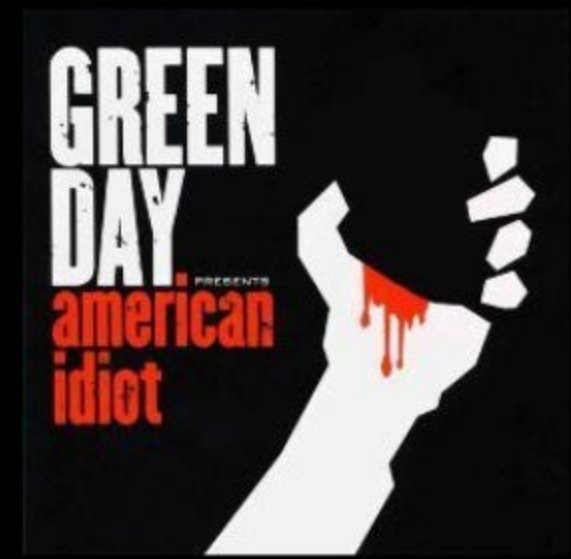
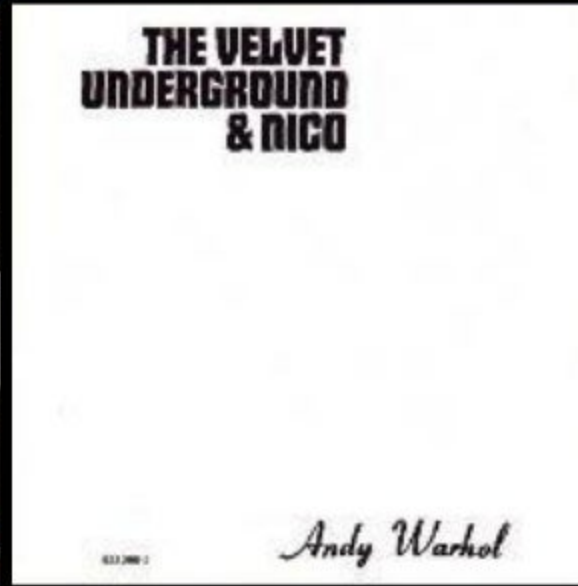
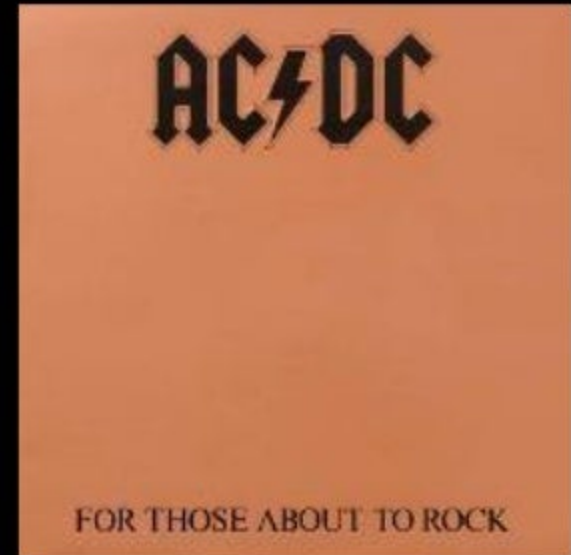




nielsen
.....

THE COMPLETE VIEW OF MUSIC

ARE YOU SEEING THE WHOLE PICTURE?

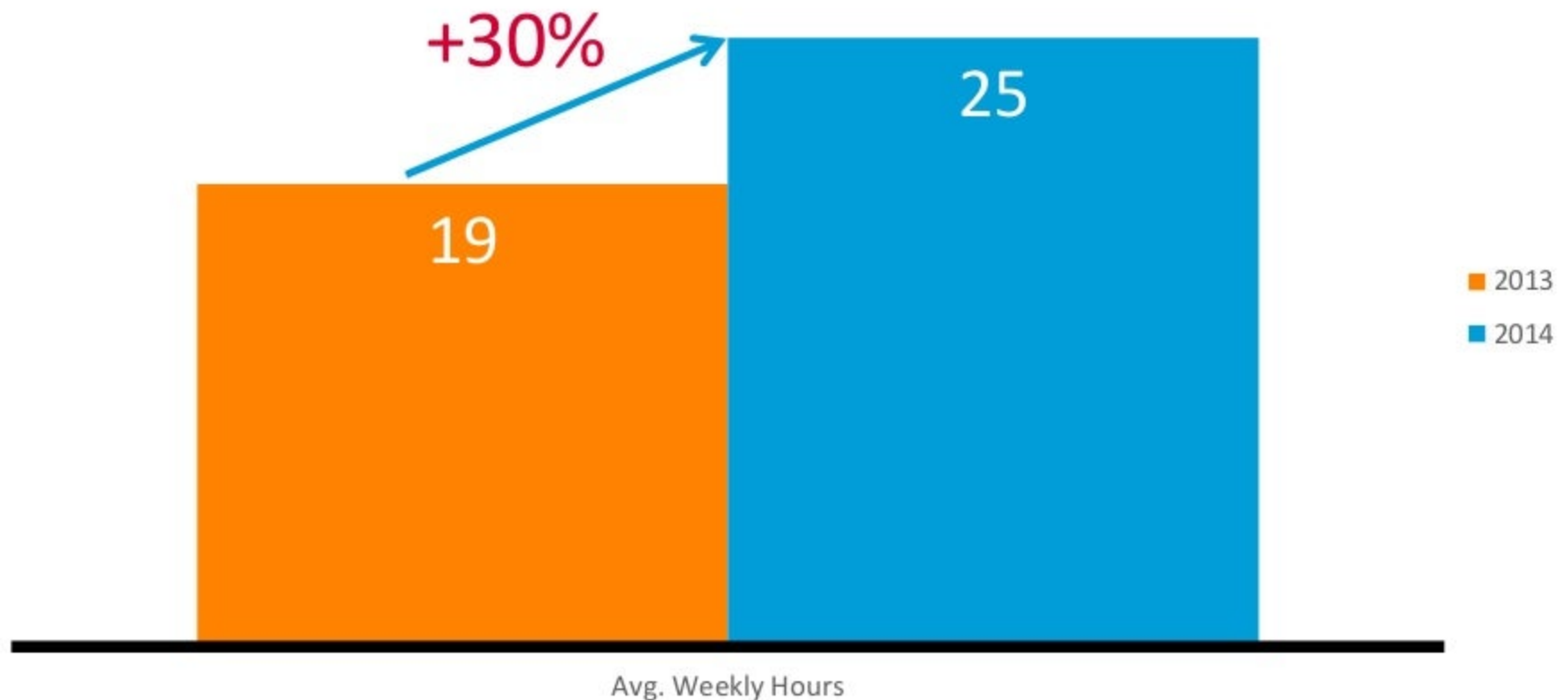


An abstract graphic on the left side of the slide. It features a series of concentric, slightly curved lines that form a partial sphere or dome shape. The lines are colored in shades of blue, green, and yellow. Several small, colored dots (yellow, green, pink, and red) are placed along these lines, connected by thin, straight lines of the same color.

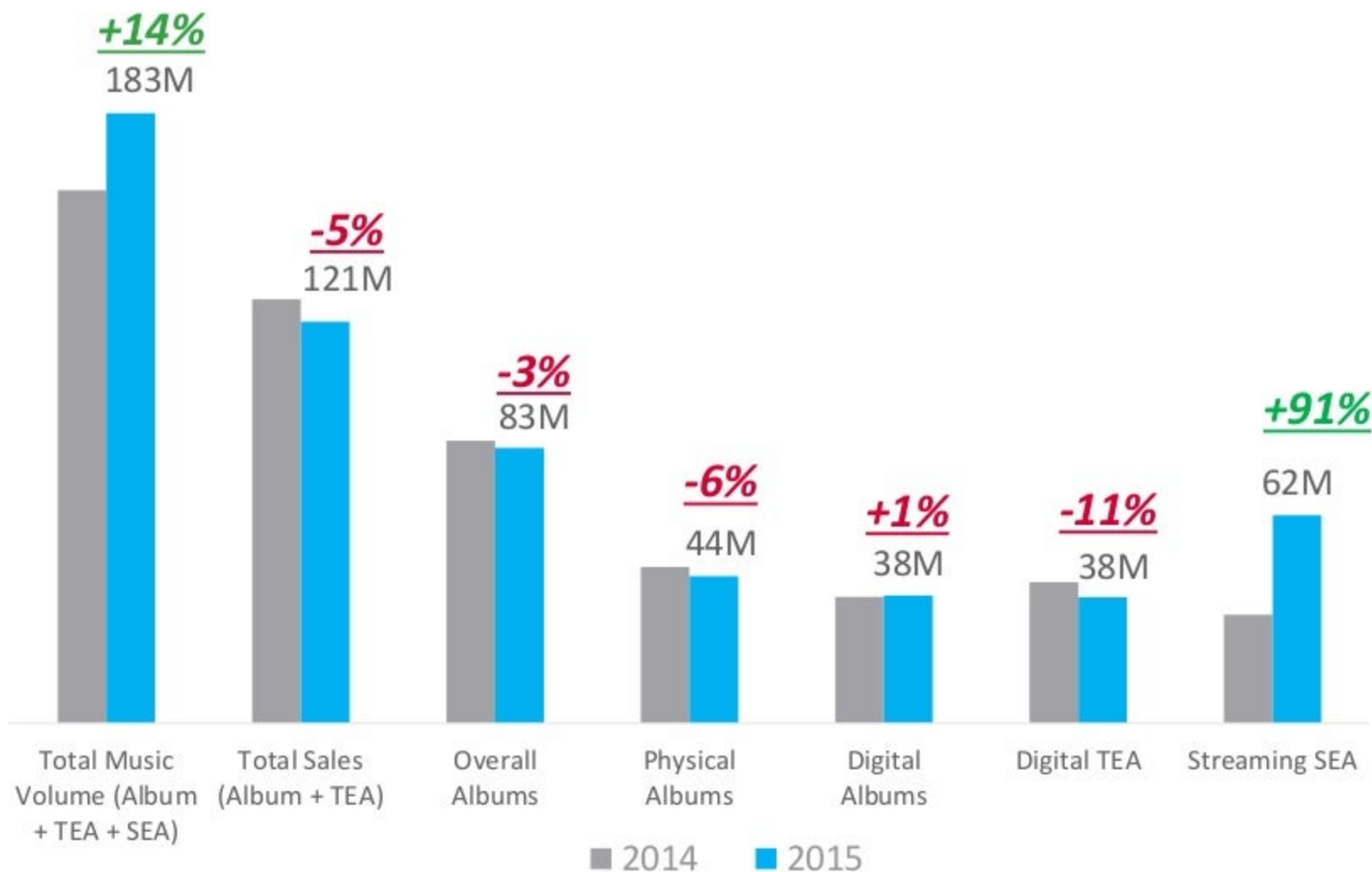
MEASUREMENT OF MUSIC ACTIVITY AND MUSIC FANS

WE ARE LISTENING TO MORE MUSIC

DRIVEN BY ACCESS AND TECHNOLOGY, LISTENING TIME IS RISING



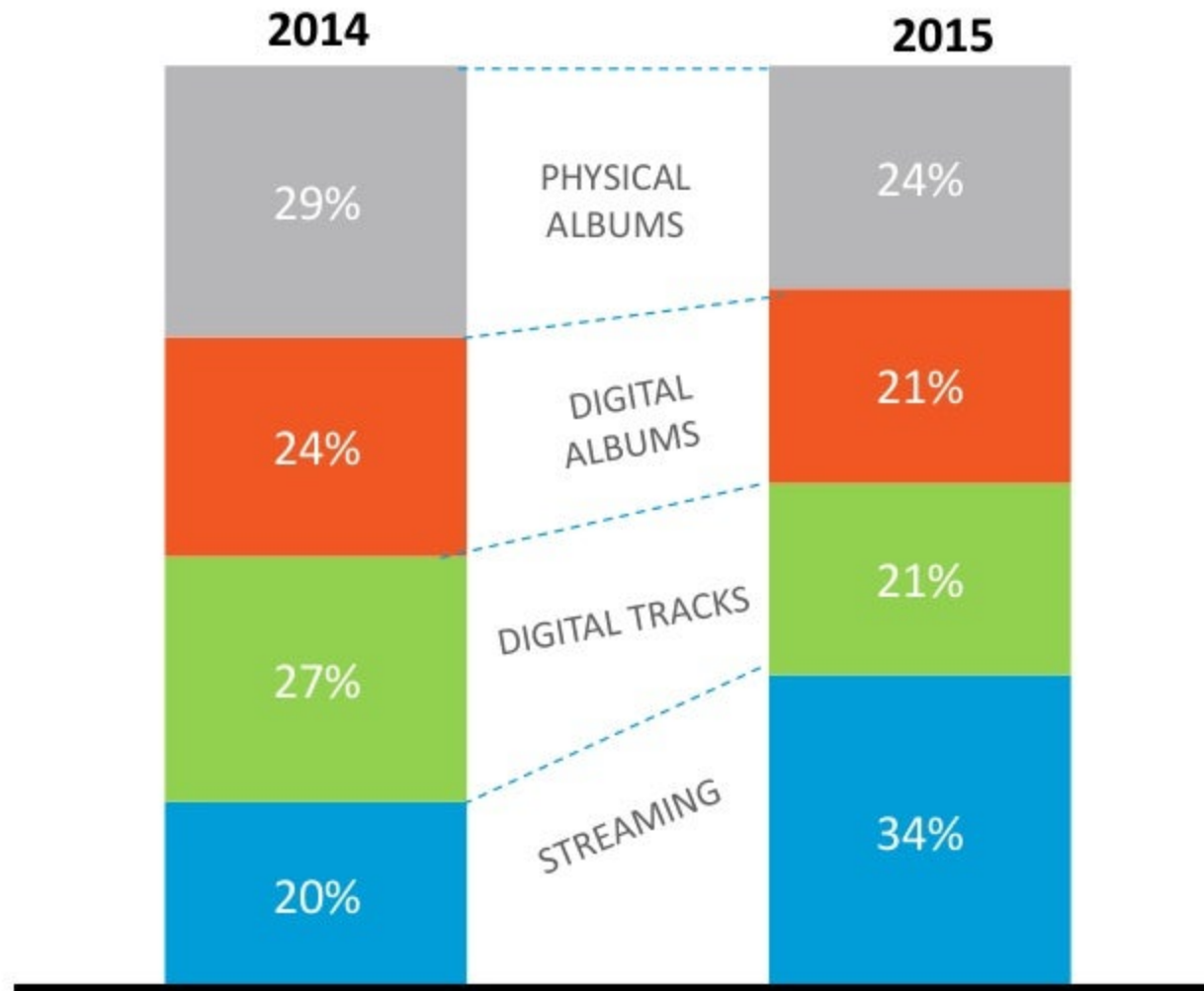
• AND MORE GOOD NEWS – OVERALL VOLUME IS UP 14% SO FAR IN 2015



TEA Ratio - 10:1

SEA Ratio - 1500:1

STREAMING HAS QUICKLY BECOME THE LARGEST SHARE OF THE BUSINESS

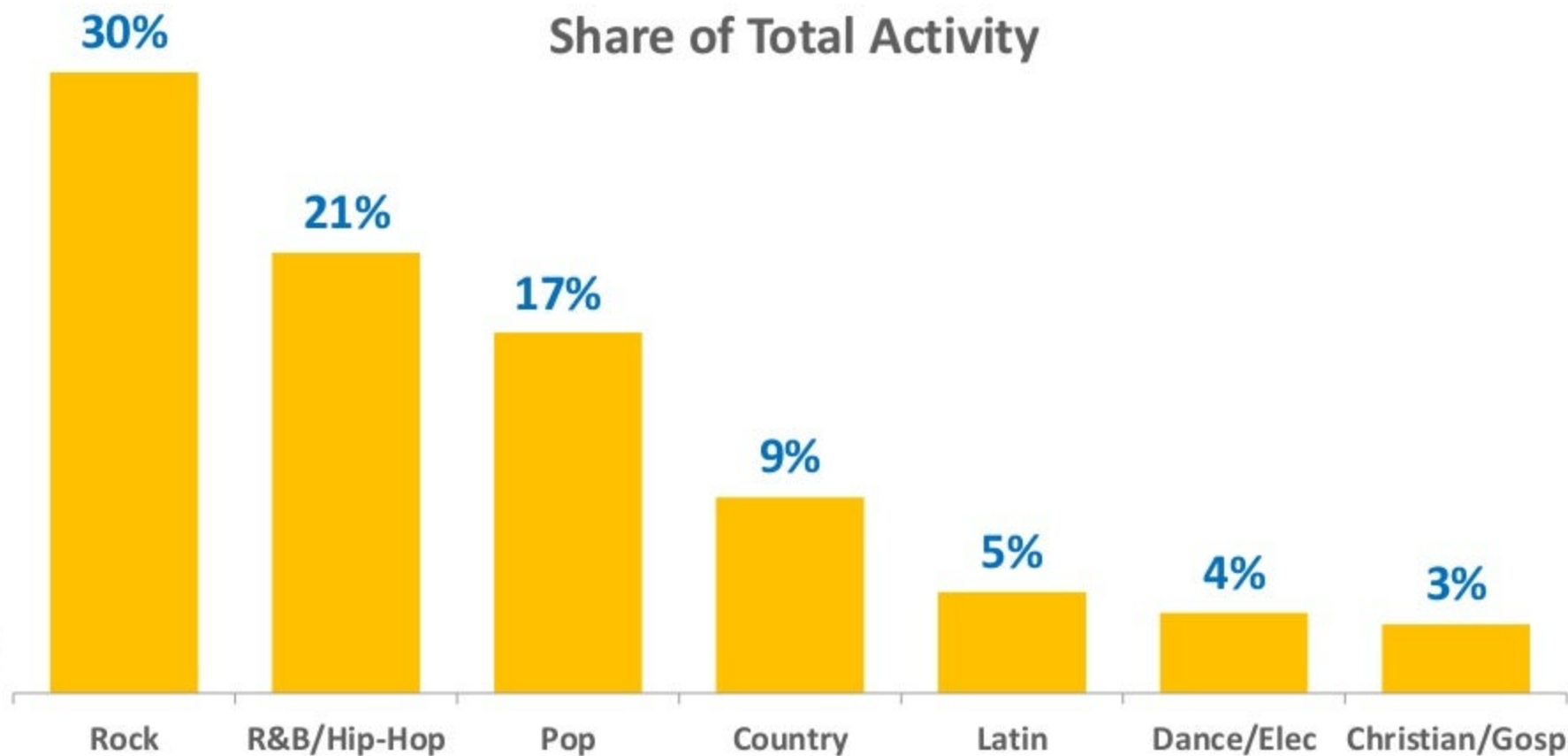


TEA Ratio - 10:1
SEA Ratio - 1500:1

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A CLOSER LOOK AT MUSIC FORMATS AND GENRES

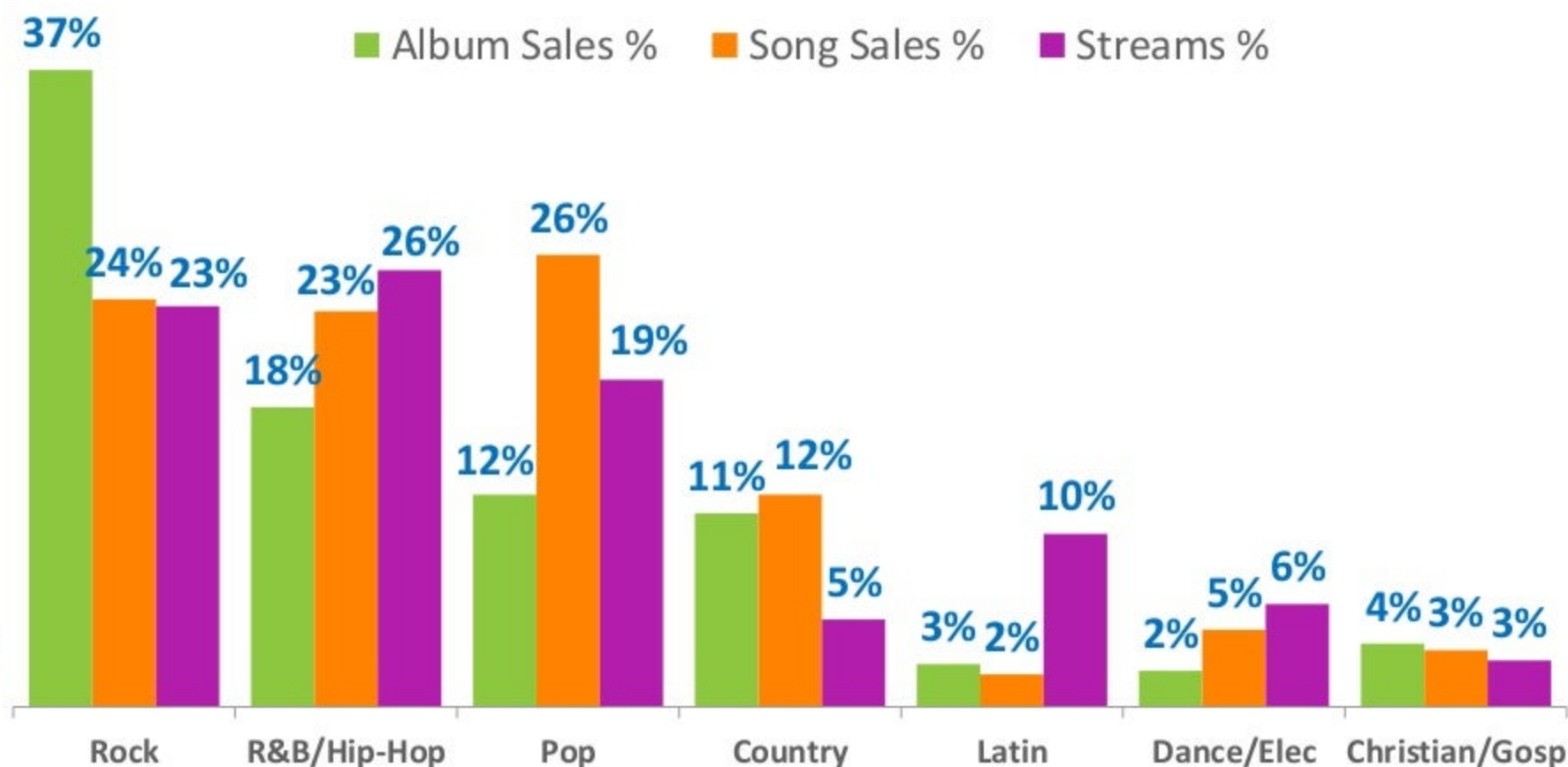
ROCK IS THE BIGGEST GENRE, BUT R&B/HIP-HOP AND POP ARE ALSO STRONG IN 2015



TEA Ratio - 10:1
SEA Ratio - 1500:1

ROCK DOMINATES ALBUMS, POP DRIVES SONG SALES AND R&B/HIP-HOP LEADS STREAMING

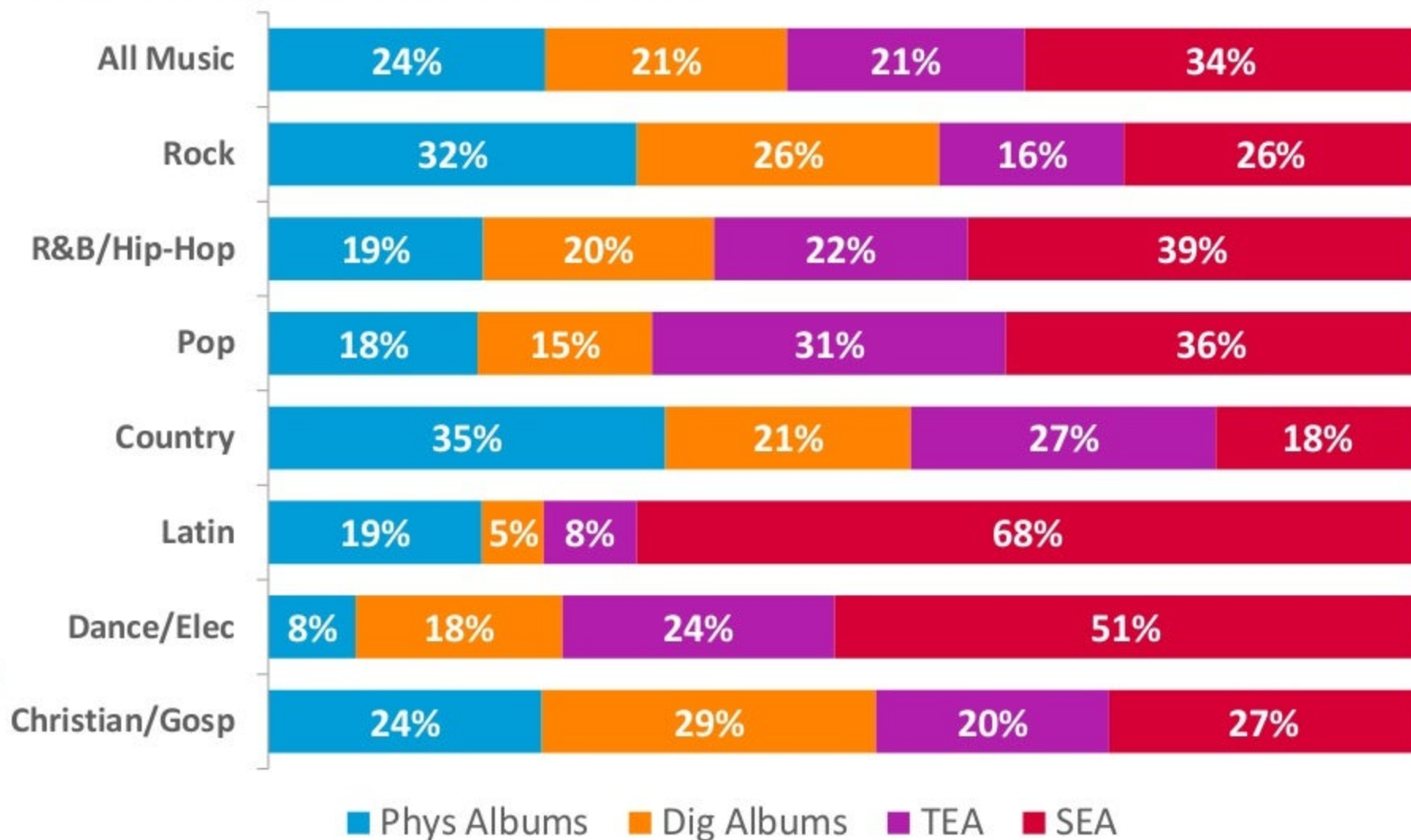
GENRE SHARE OF TOTAL



STREAMING HAS BECOME THE LEADING FORMAT

OVERALL AND IN MOST GENRES

SHARE OF TOTAL EQUIVALENTS BY FORMAT



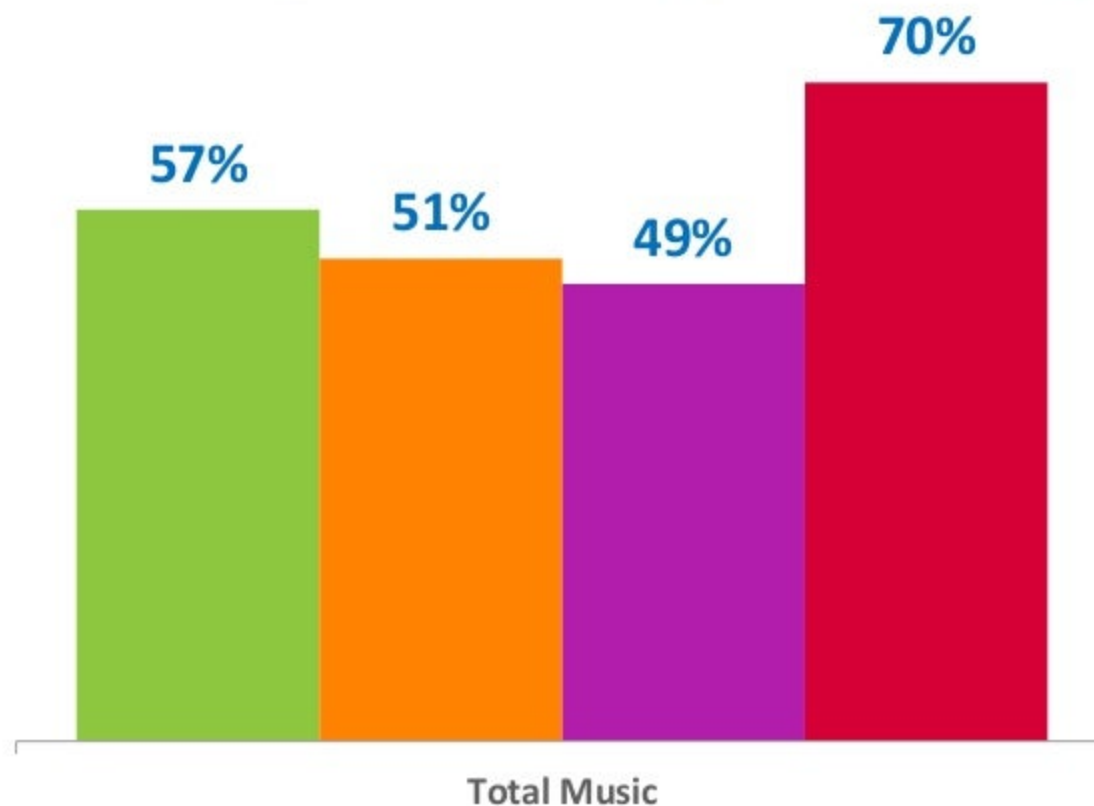
TEA Ratio - 10:1

SEA Ratio - 1500:1

WHILE SALES ARE EVENLY SPLIT BETWEEN CURRENT AND CATALOG, STREAMS ARE 70% CATALOG

Catalog Share of Format

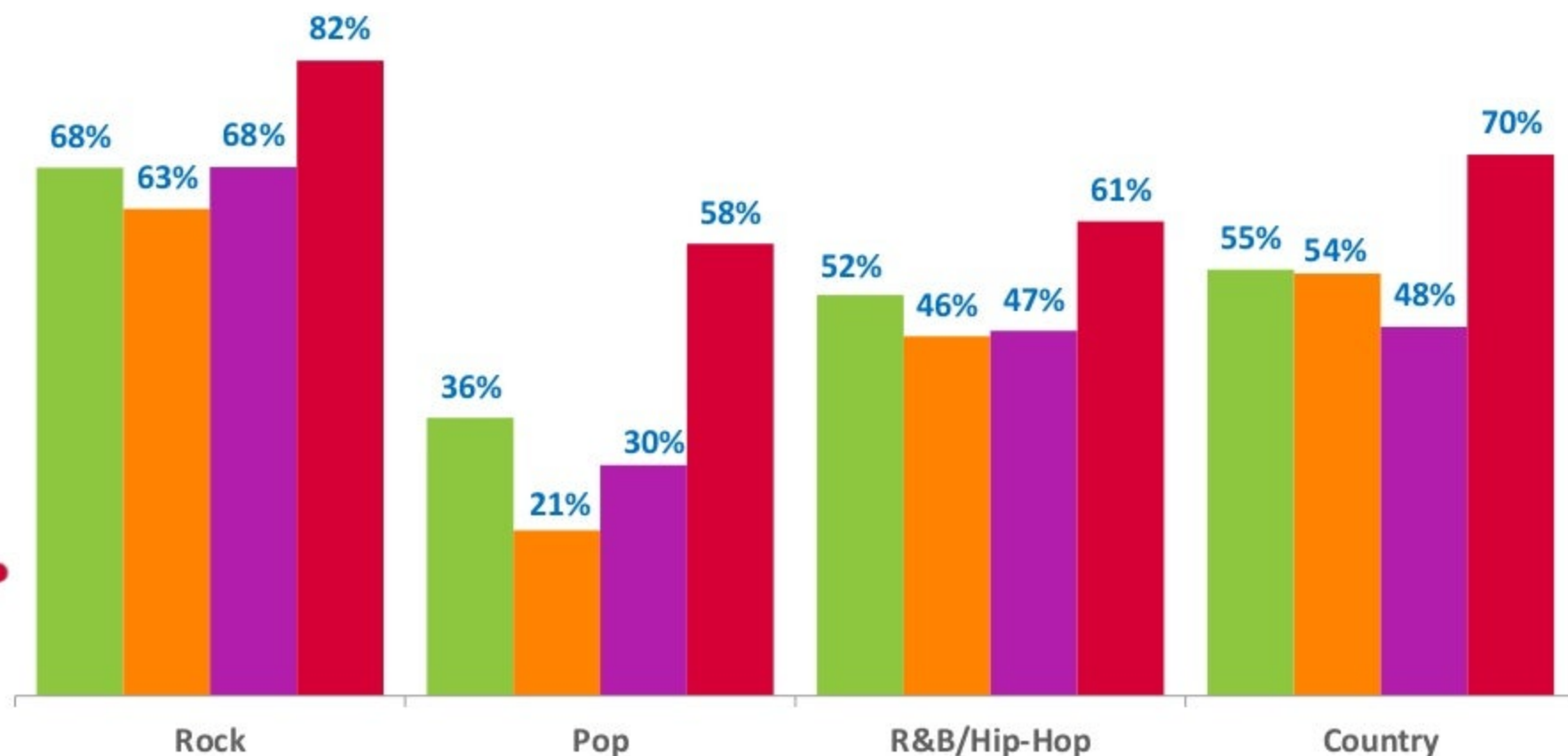
■ Total Activity ■ Album Sales % ■ Song Sales % ■ Streams %



ROCK IS DRIVEN BY CATALOG AT ALL FORMATS, WHILE POP IS MAINLY DRIVEN BY CURRENT

Catalog Share of Format

■ Total Activity ■ Album Sales % ■ Song Sales % ■ Streams %



An abstract graphic on the left side of the slide. It features a dark blue cone-like shape composed of many thin, curved lines in various colors (blue, green, yellow, red). Several small, colored dots (yellow, green, pink, red) are placed along these lines, with thin lines connecting some of them, suggesting a path or trajectory.

DIFFERENT TYPES OF CONSUMPTION MEANS DIFFERENT PATHS TO SUCCESS

THE TOP ALBUMS ACHIEVE SUCCESS IN DIFFERENT WAYS

Rank	Artist	Title	Total Volume (000)	Album Share	Song Sales Share	On-Demand Audio Stream Share
1	TAYLOR SWIFT	1989	1,608	67%	33%	0%
2	DRAKE	IF YOU'RE READING THIS	1,250	71%	13%	16%
3	ED SHEERAN	X	1,178	52%	36%	11%
4	SAM SMITH	IN THE LONELY HOUR	1,097	61%	27%	12%
5	SOUNDTRACK	50 SHADES OF GREY	1,031	61%	31%	8%
6	MEGHAN TRAINOR	TITLE	961	63%	30%	8%
7	MAROON 5	V	762	40%	48%	12%
8	NICKI MINAJ	PINKPRINT	699	43%	38%	18%
9	KENDRICK LAMAR	TO PIMP A BUTTERFLY	660	84%	5%	11%
10	FALL OUT BOY	AMERICAN BEAUTY...	632	65%	25%	10%

SOME OTHER NOTABLE SUCCESSES IN 2015

Rank	Artist	Title	Total Volume (000)	Album Share	Song Sales Share	On-Demand Audio Stream Share
12	MARK RONSON	UPTOWN SPECIAL	523	19%	70%	11%
15	FURIOUS 7	SOUNDTRACK	442	36%	55%	9%
17	EMPIRE CAST	SEASON 1 SOUNDTRACK	433	80%	15%	5%
19	ARIANA GRANDE	MY EVERYTHING	414	28%	47%	25%
	CHRIS BROWN	X	136	36%	32%	32%
	DRAKE	NOTHING WAS THE SAME	127	29%	24%	47%

STRONG CORRELATION BETWEEN STREAMS, SALES AND RADIO AUDIENCE - *USUALLY* n

Top On-Demand Songs YTD	Total On-Demand Streams (000)	Audio Rank	Video Rank	Song Sales Rank	Radio Rank (Audience)
1. MARK RONSON FEAT. BRUNO MARS UPTOWN FUNK!	285,647	#1	#1	#1	#1
2. ED SHEERAN THINKING OUT LOUD	182,310	#2	#3	#2	#2
3. FETTY WAP TRAP QUEEN	146,598	#8	#5	#16	#61
4. MAROON 5 SUGAR	139,387	#4	#8	#3	#4
5. HOZIER TAKE ME TO CHURCH	124,625	#5	#15	#5	#7
6. TAYLOR SWIFT SHAKE IT OFF	119,401	NR	#2	#17	#24
7. WEEKND EARNED IT (FIFTY SHADES OF GREY)	117,196	#3	#22	#8	#12
8. ELLIE GOULDING LOVE ME LIKE YOU DO	112,895	#6	#21	#4	#6
9. TAYLOR SWIFT BLANK SPACE	111,181	NR	#4	#9	#3
10. MEGHAN TRAINOR ALL ABOUT THAT BASS	109,450	#38	#6	#25	#51

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THE ATTRIBUTES OF A SUCCESSFUL ARTIST

N-SCORE CELEBRITY PERCEPTION

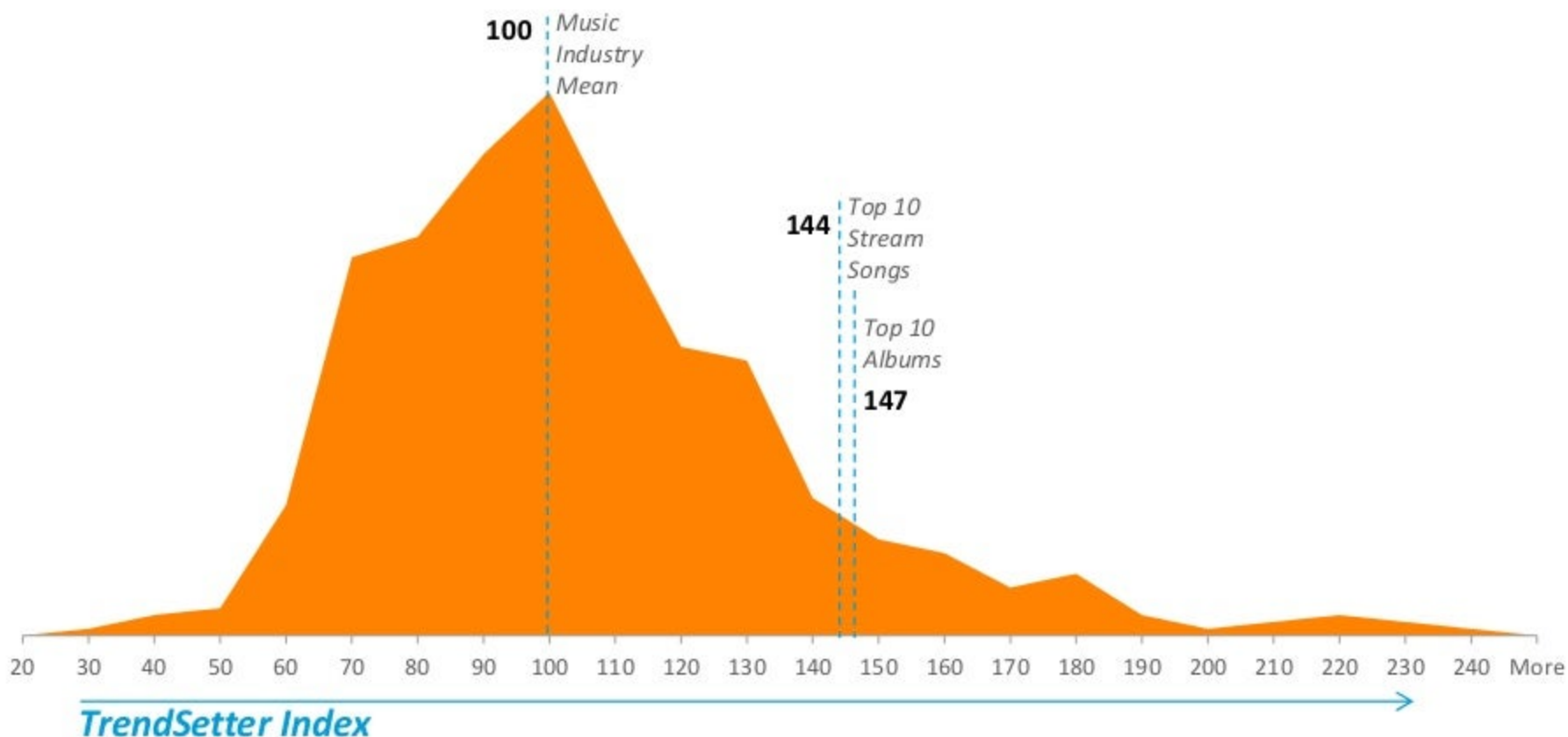
Our N-Score tool allows us to measure fan affinity and sentiment for individual celebrities – and assess their potential for brand partnerships



We can evaluate an artist or celebrity's ability to move products and enhance brand reputation.

TOP ARTISTS ARE SEEN AS TRENDSETTERS

Artists of the top 10 albums purchased and top 10 streamed songs are, above all else, seen as *Trendsetters* in the music industry



Frequency of occurrences of trendsetter score, indexed to music industry mean.

Source: Nielsen N-Score 01/01/2014 – 2/17/2015

THE MOST SUCCESSFUL COUNTRY ARTISTS ARE SEEN AS LIKEABLE, UNOFFENSIVE, DEPENDABLE AND ROLE-MODELS

	<i>Country</i>
N-Score	78
Awareness	47
Likeability	73
Dependable	27
Funny	17
Good Looking	37
Influential	32
Offensive	2
Role Model	24
Social Media Savvy	20
Stylish	28
Successful	60
Trendsetter	15

NO WONDER COUNTRY FANS HAVE SO MUCH ENERGY

WHO ARE THEY?

58% of country music fans are female.

81% of country music fans are white.

THEY ARE ACTIVE ON SOCIAL MEDIA, PARTICULARLY AROUND LIVE MUSIC EVENTS

20 – 30% more likely than the average music fan to post photos or update status about live music.

THEY STILL LOVE RADIO

Radio is both the most popular platform and the most popular listening device.

WHAT ARE THEY DRINKING?

Far more likely to drink energy drinks.

Also, favor domestic beers over imported and flavored alcoholic spirits over wine.

HIP HOP FANS ARE MORE TOLERANT OF THEIR ARTISTS BEING OFFENSIVE, BUT IT IS IMPORTANT FOR THEM TO BE INFLUENTIAL, STYLISH TREND-SETTERS

	<i>Country</i>	<i>Hip-Hop</i>
N-Score	78	70
Awareness	47	44
Likeability	73	63
Dependable	27	19
Funny	17	16
Good Looking	37	24
Influential	32	32
Offensive	2	11
Role Model	24	18
Social Media Savvy	20	24
Stylish	28	29
Successful	60	50
Trendsetter	15	22

• HIP-HOP FANS ARE AT THE FOREFRONT OF THE DIGITAL MUSIC MOVEMENT

WHO ARE THEY?

Over twice as likely to be African- American and 50% more likely to be Hispanic.

THEY ARE VERY ENGAGED WITH DIGITAL MUSIC

Far more likely to use streaming services for both consumption and discovery.

Strong social element – hip-hop consumers are more than twice as likely to connect with friends through music.

THEY ARE SPENDING MORE

Hip-hop fans spend 35% more annually on music, including twice as much on club events with live DJs and 40% more on music festivals.

WHAT MOBILE SERVICES?

Use Sprint and T-Mobile significantly more than the average consumer.

Also, 50% more likely to have a Samsung mobile phone than average.

WHILE EDM HAS LOWER GENERAL AWARENESS, TRAITS OF THE MOST SUCCESSFUL ARTISTS INCLUDE BEING INFLUENTIAL TREND-SETTERS AND SOCIAL MEDIA SAVVY

	<i>Country</i>	<i>Hip-Hop</i>	<i>EDM</i>
N-Score	78	70	66
Awareness	47	44	25
Likeability	73	63	67
Dependable	27	19	18
Funny	17	16	17
Good Looking	37	24	22
Influential	32	32	30
Offensive	2	11	5
Role Model	24	18	16
Social Media Savvy	20	24	26
Stylish	28	29	22
Successful	60	50	41
Trendsetter	15	22	20

EDM FANS – DIGITALLY DRIVEN CONSUMERS WHO LOVE FESTIVALS AND SUGAR

WHO ARE THEY?

Tend to be younger and skew male.

Almost twice as likely to be Hispanic than average.

TRENDSETTERS AND DIGITALLY ENGAGED

They are more likely to be seen as musical trendsetters by their peers.

They are more likely to stream music and more likely to pay for streaming.

THEY ATTEND FESTIVALS

They are more likely to attend festivals and are more likely to post live event updates and videos to social media.

THE SUGAR BUZZ AND BRAND ENGAGEMENT

50% more likely to purchase energy drinks, 19% more likely to purchase chewing gum and 18% less likely to drink diet soda.

53% view brands more favorably when they sponsor tours/concerts.

USING DATA TO DRIVE DECISION MAKING AT THE ARTIST LEVEL

IGGY AZALEA



63

49

46

9

11

32

25

13

10

25

31

50

26



N-Score

Awareness

Likeability

Dependable

Funny

Good Looking

Influential

Offensive

Role Model

Social Media Savvy

Stylish

Successful

Trendsetter



66

37

54

12

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ARIANA GRANDE



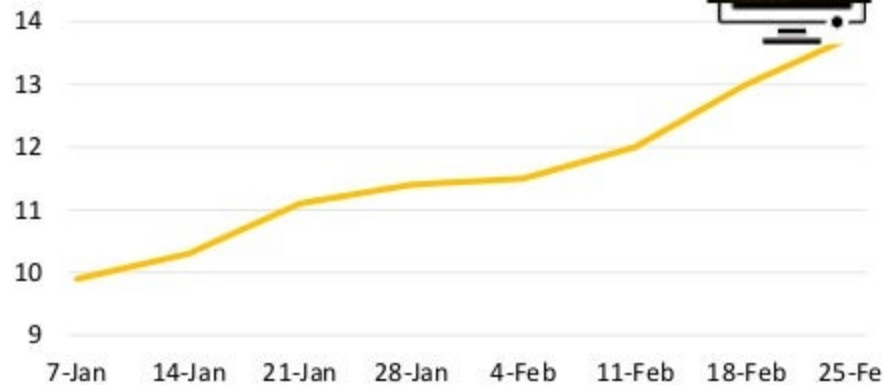


AND LET'S NOT FORGET ABOUT THE POWER
OF TELEVISION

A MUSIC STORY GROWING FROM TELEVISION

EMPIRE

VIEWERS (MILLIONS)



TELEVISION



As of Feb 25th, Empire ranked as the No.1 show on network television (18-49)



The show became the first series since 1991 to gain increased viewership for its first 5 consecutive weeks on air



Feb 25th ep. was the highest rated regular Broadcast drama in approximately 5 years

ONLINE



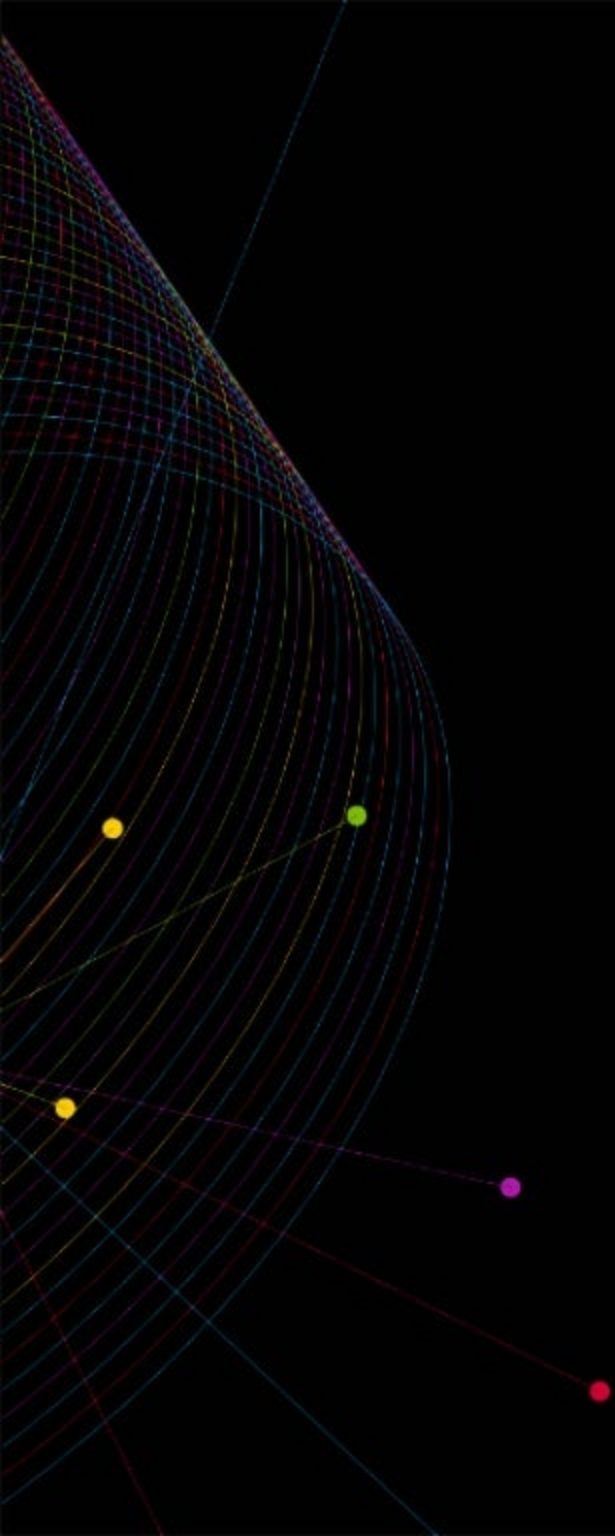
Overall, THE most tweeted about show since its premiere (Cable or Broadcast)



At 382,000 each airing, the show garners the highest average tweets per episode during live airings of any Broadcast drama this season

SOCIAL TRAFFIC



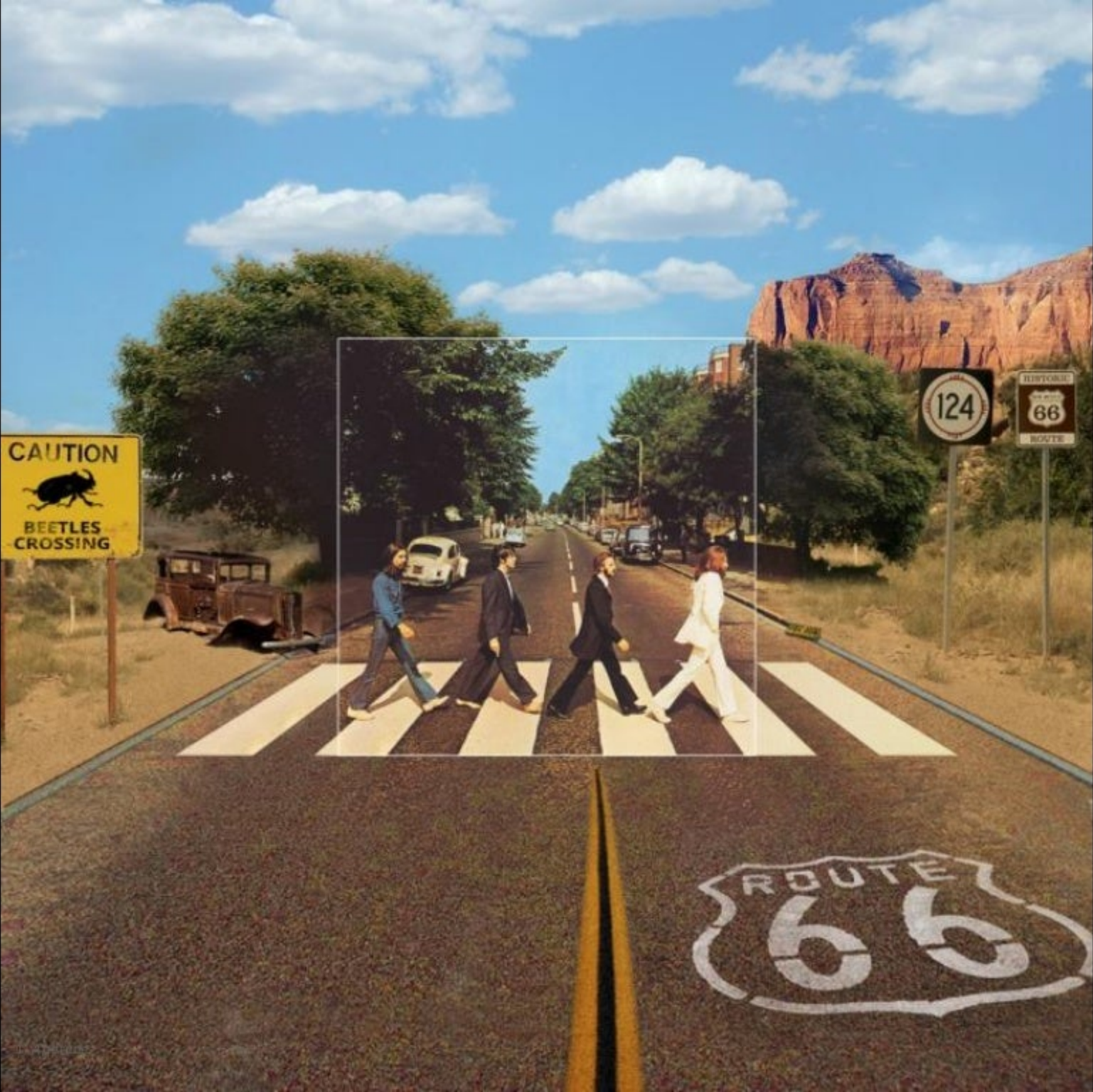
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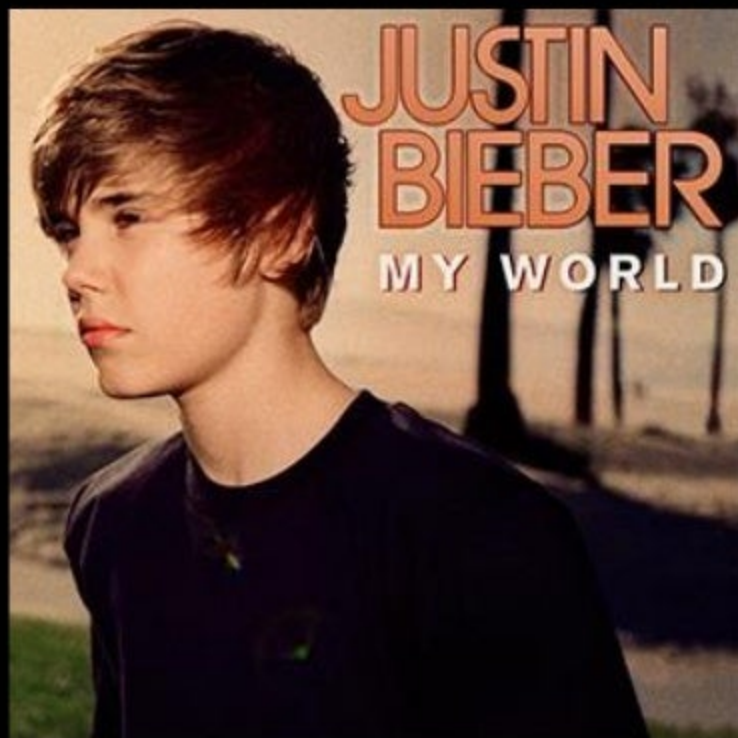
SEE THE WHOLE PICTURE















THANK YOU!