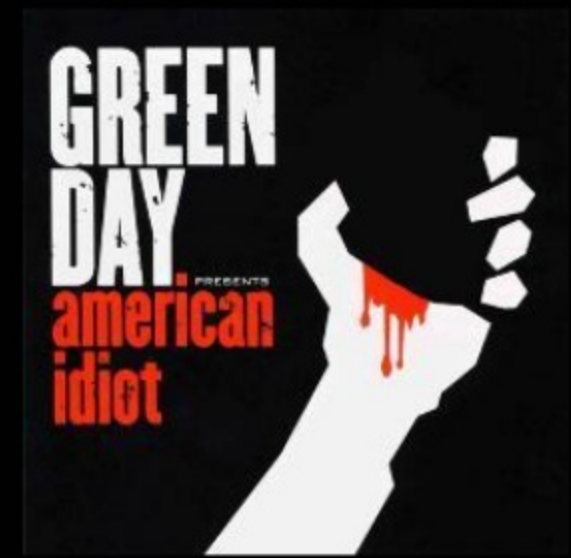
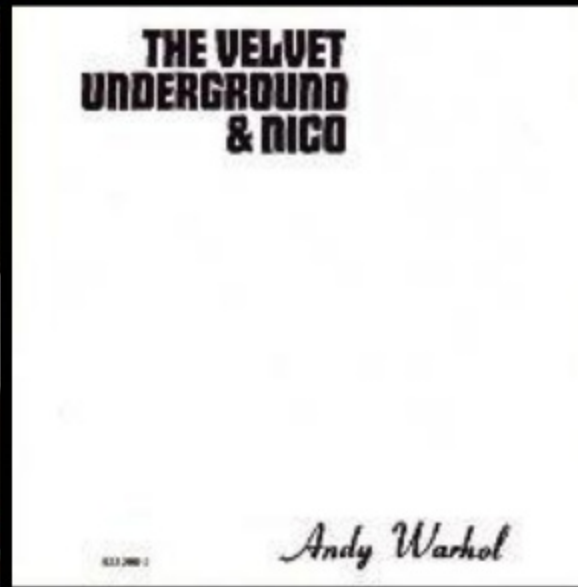
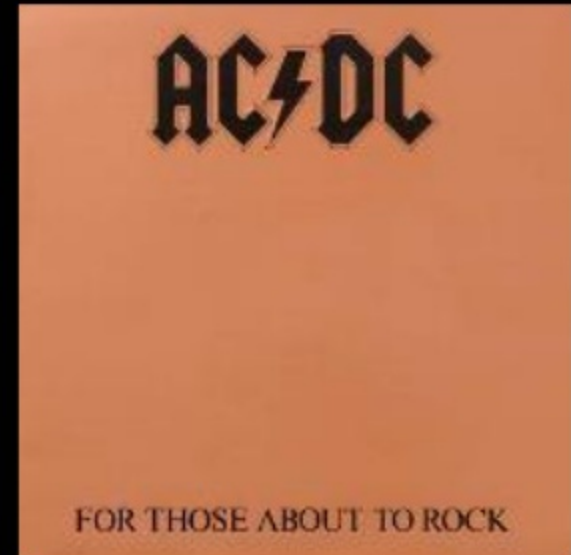




nielsen
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THE COMPLETE VIEW OF MUSIC

ARE YOU SEEING THE WHOLE PICTURE?

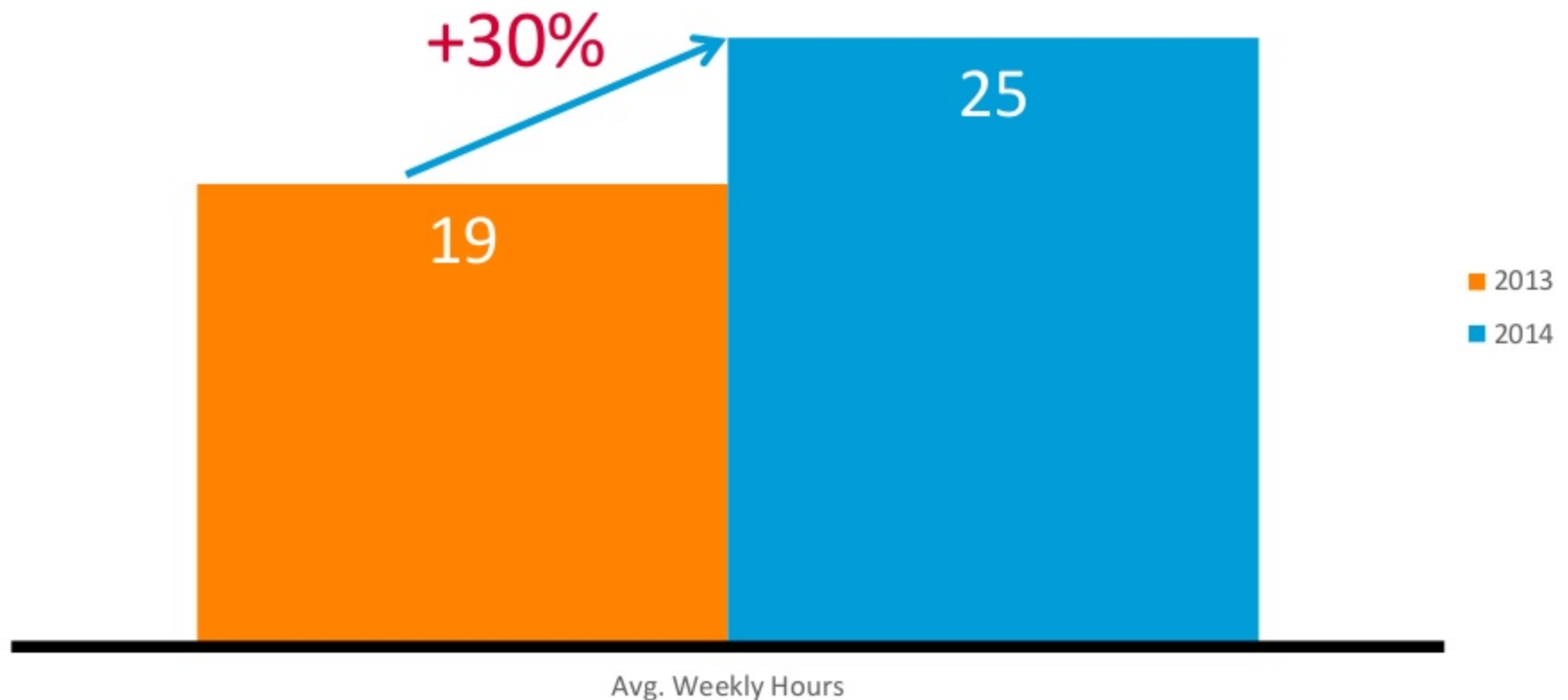




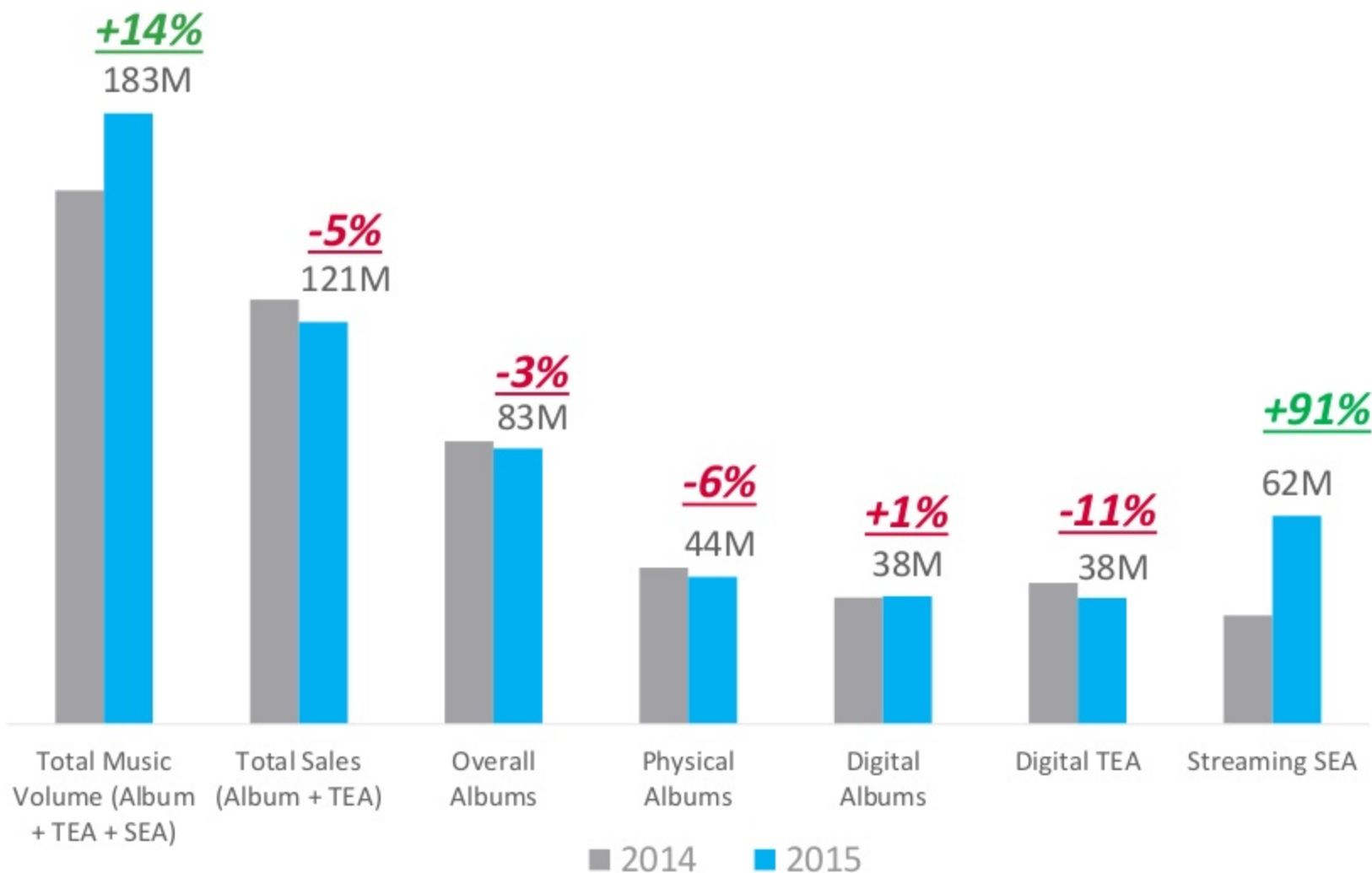
MEASUREMENT OF MUSIC ACTIVITY AND MUSIC FANS

WE ARE LISTENING TO MORE MUSIC

DRIVEN BY ACCESS AND TECHNOLOGY, LISTENING TIME IS RISING



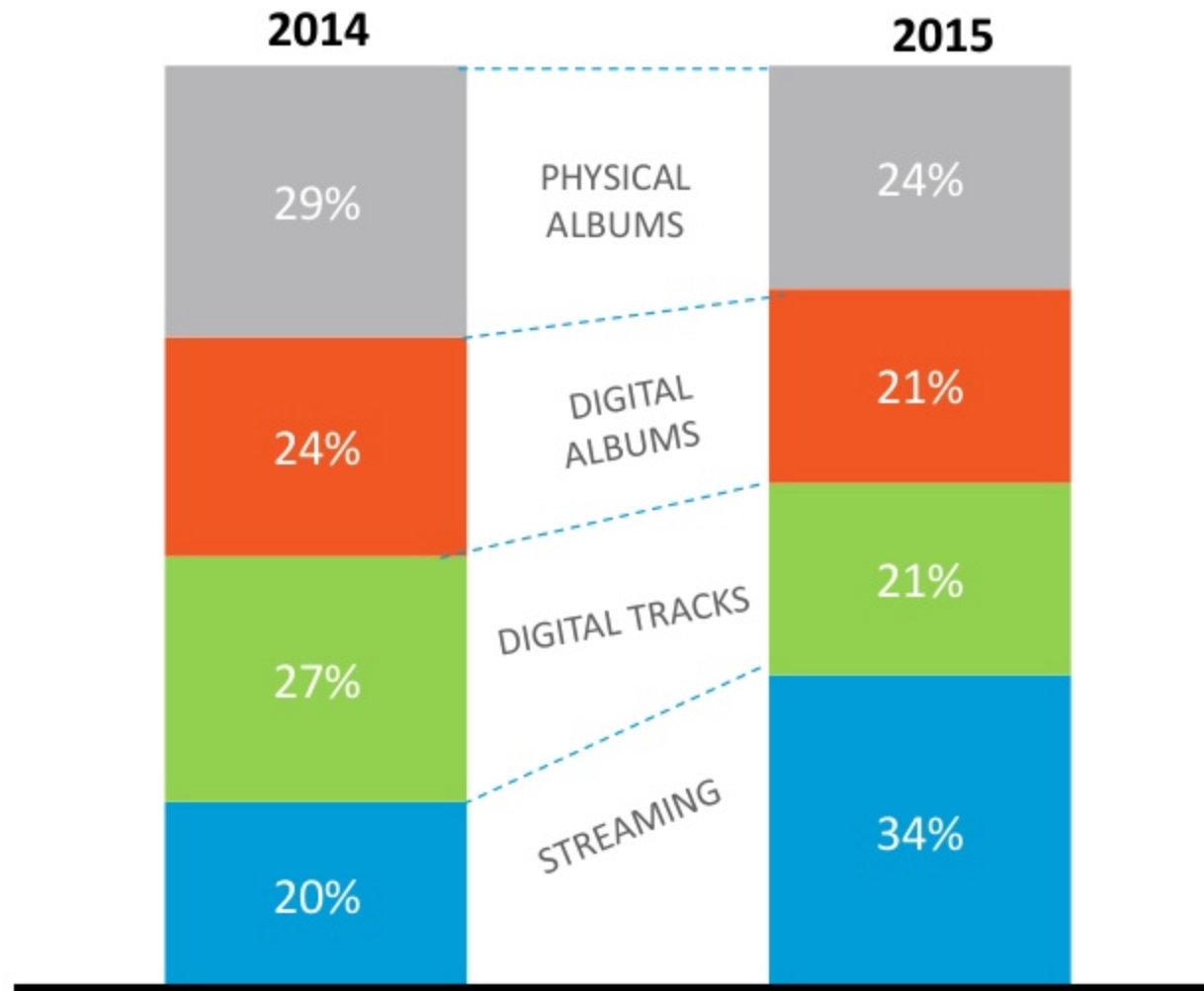
• AND MORE GOOD NEWS – OVERALL VOLUME IS UP 14% SO FAR IN 2015



TEA Ratio - 10:1

SEA Ratio - 1500:1

STREAMING HAS QUICKLY BECOME THE LARGEST SHARE OF THE BUSINESS

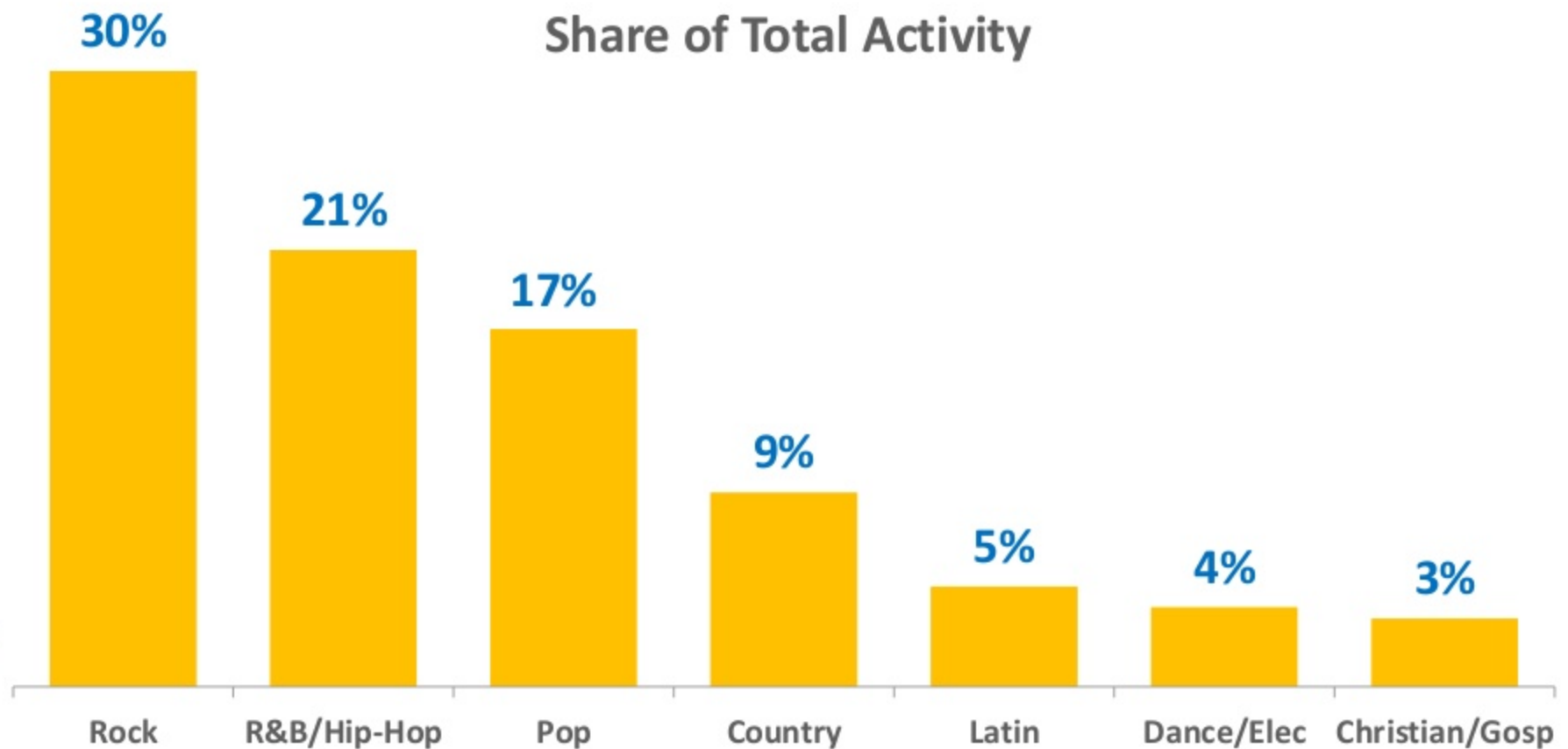


TEA Ratio - 10:1
SEA Ratio - 1500:1



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

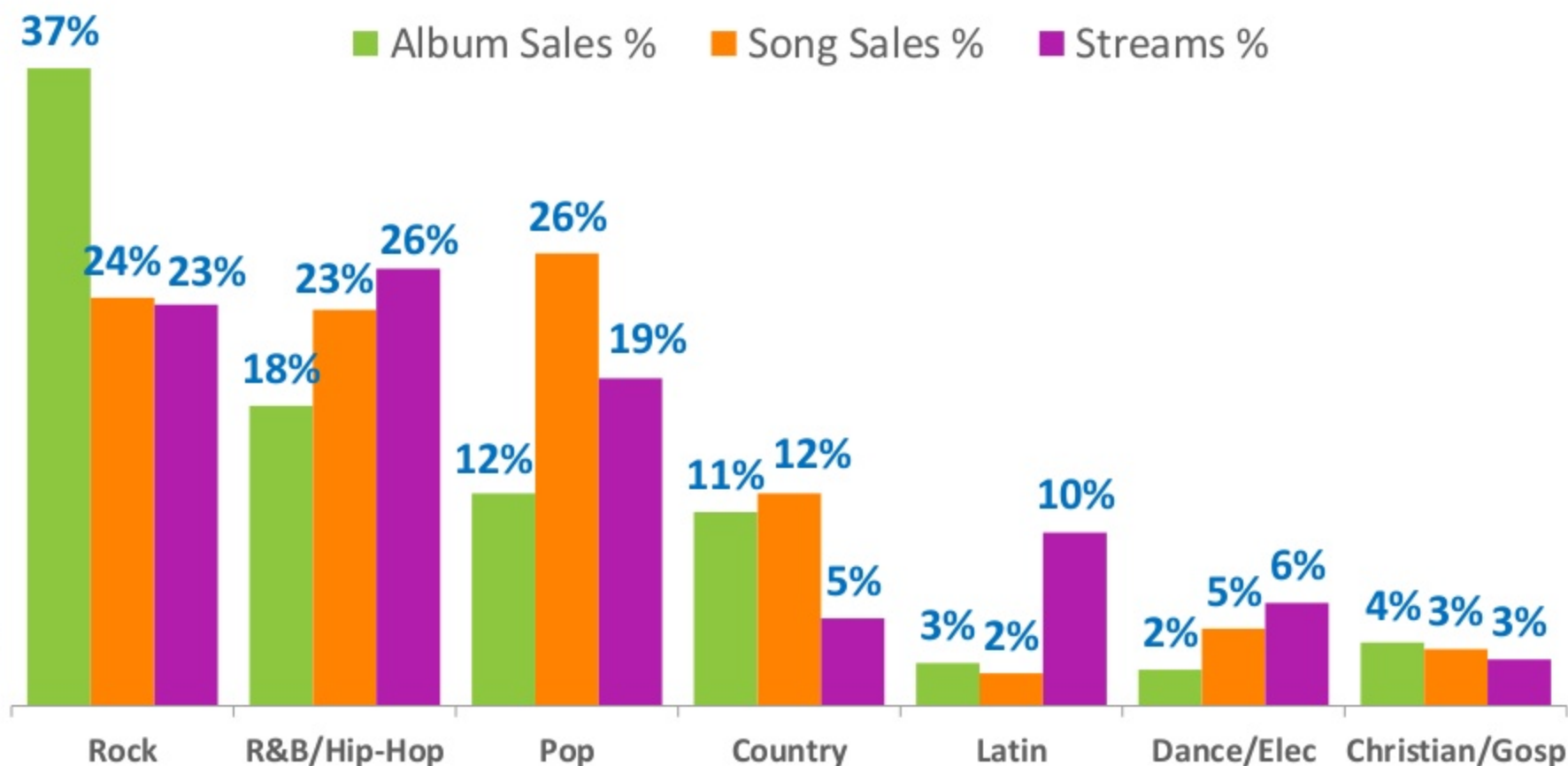


TEA Ratio - 10:1
SEA Ratio - 1500:1

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

GENRE SHARE OF TOTAL

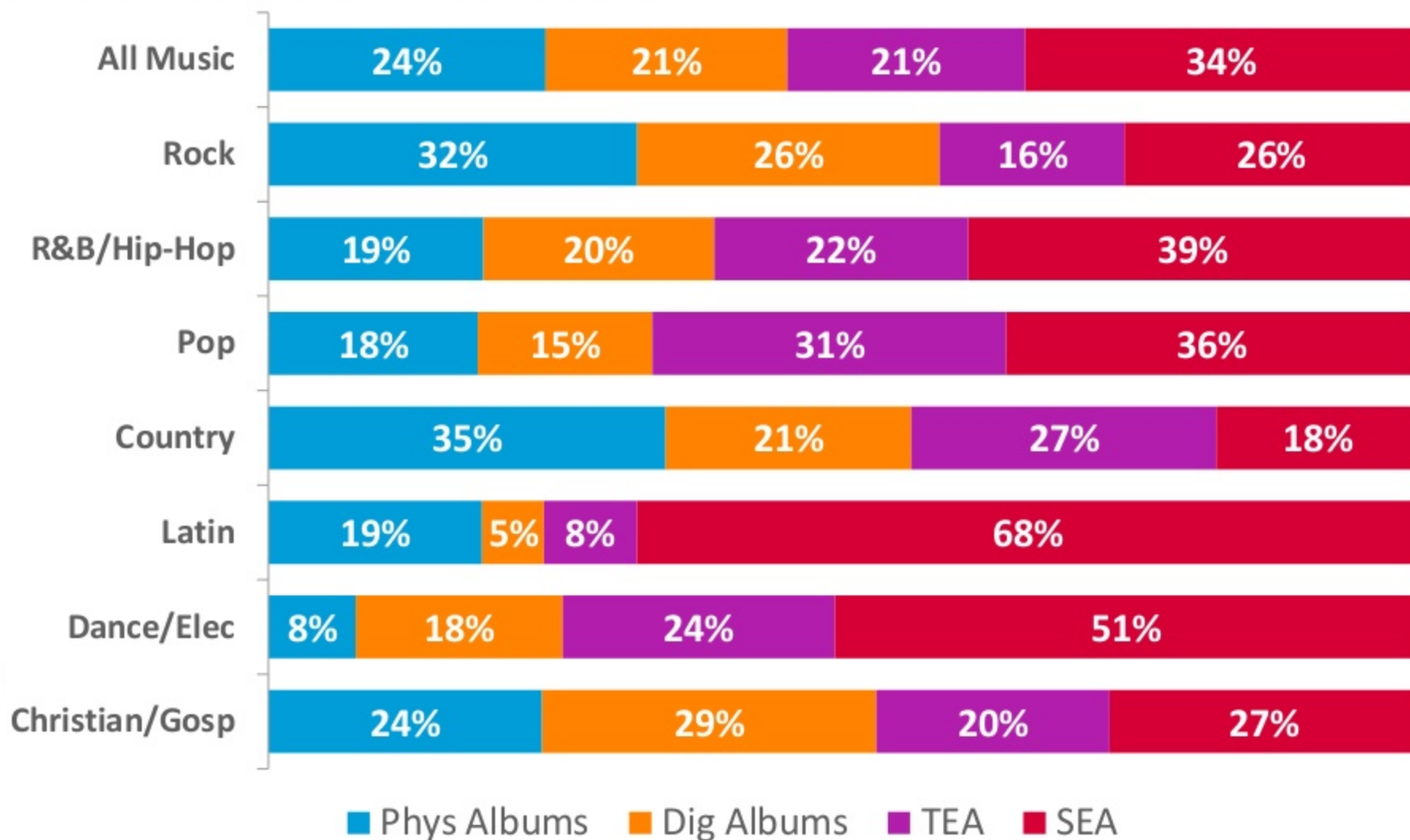
■ Album Sales % ■ Song Sales % ■ Streams %



STREAMING HAS BECOME THE LEADING FORMAT

OVERALL AND IN MOST GENRES

SHARE OF TOTAL EQUIVALENTS BY FORMAT



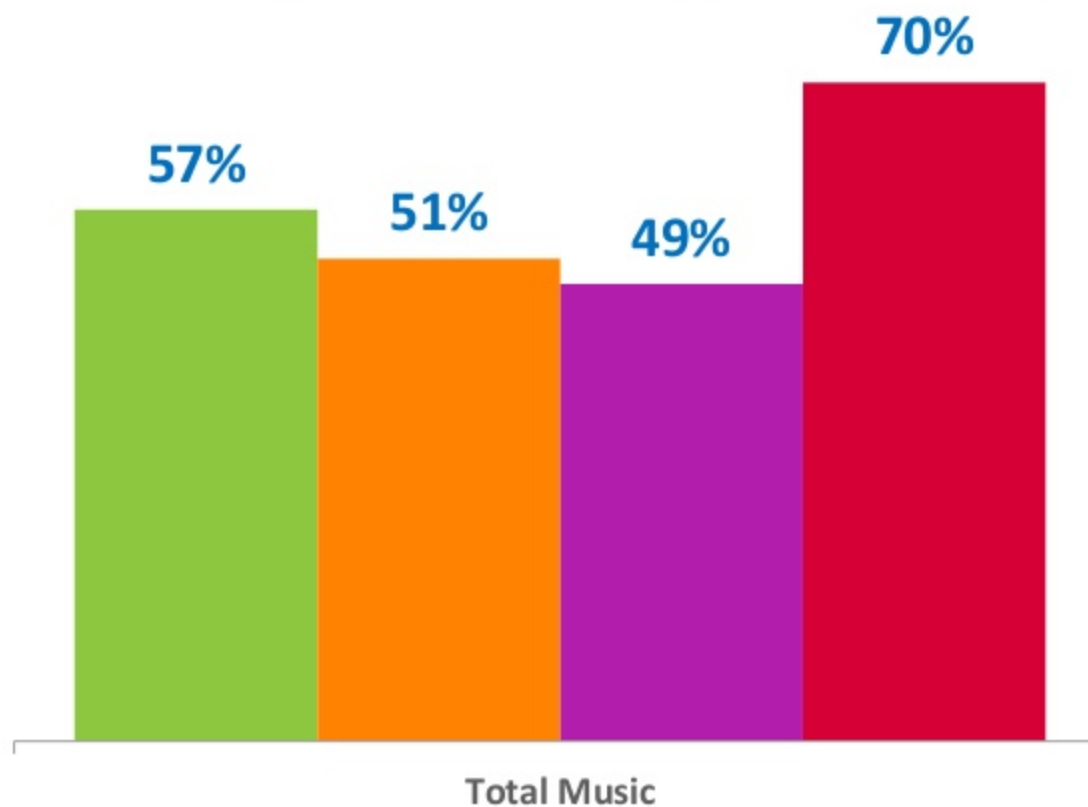
TEA Ratio - 10:1

SEA Ratio - 1500:1

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

Catalog Share of Format

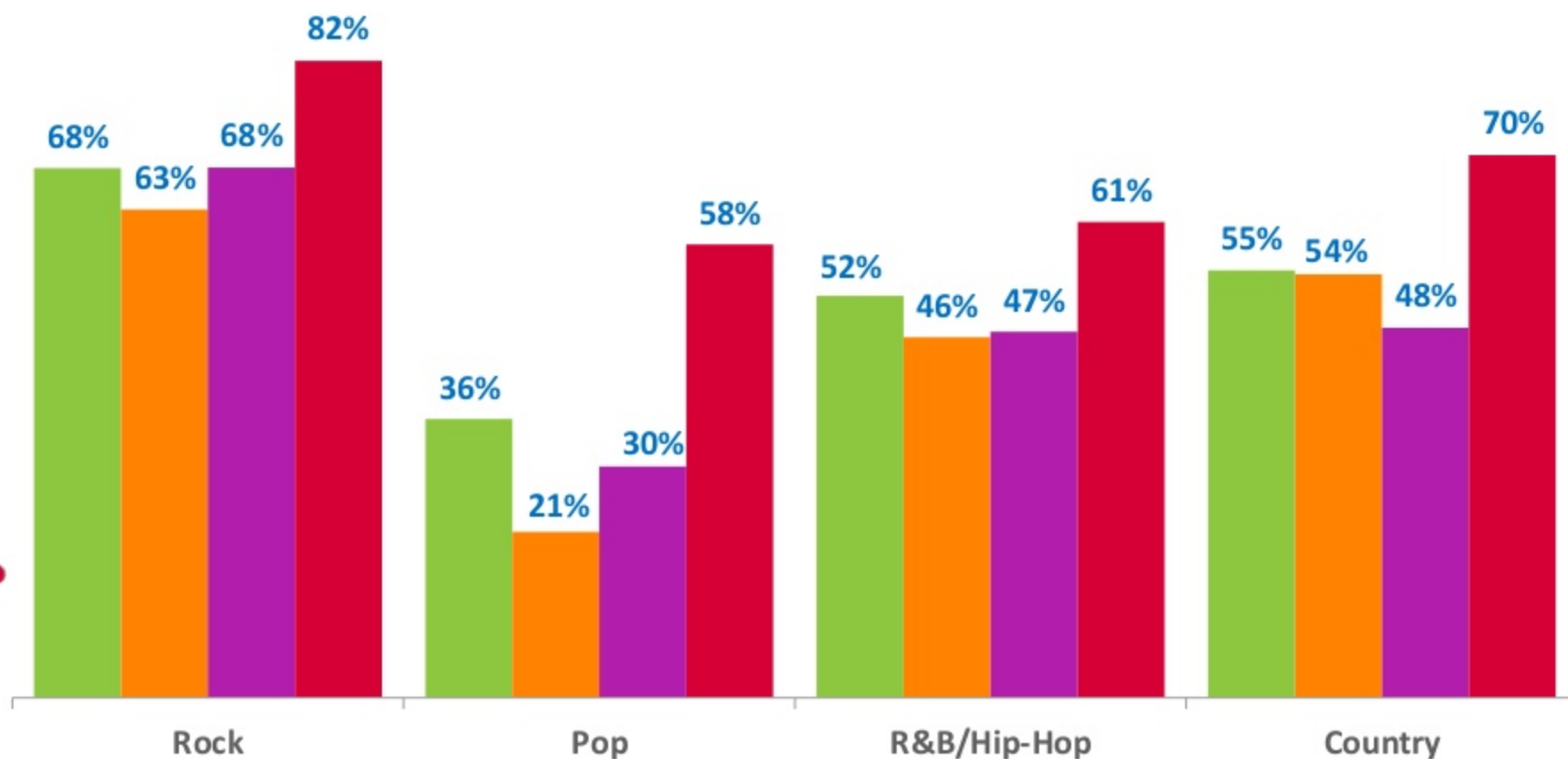
■ Total Activity ■ Album Sales % ■ Song Sales % ■ Streams %



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 cone-like shape formed by many thin, curved lines in various colors (blue, green, yellow, red, purple). 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

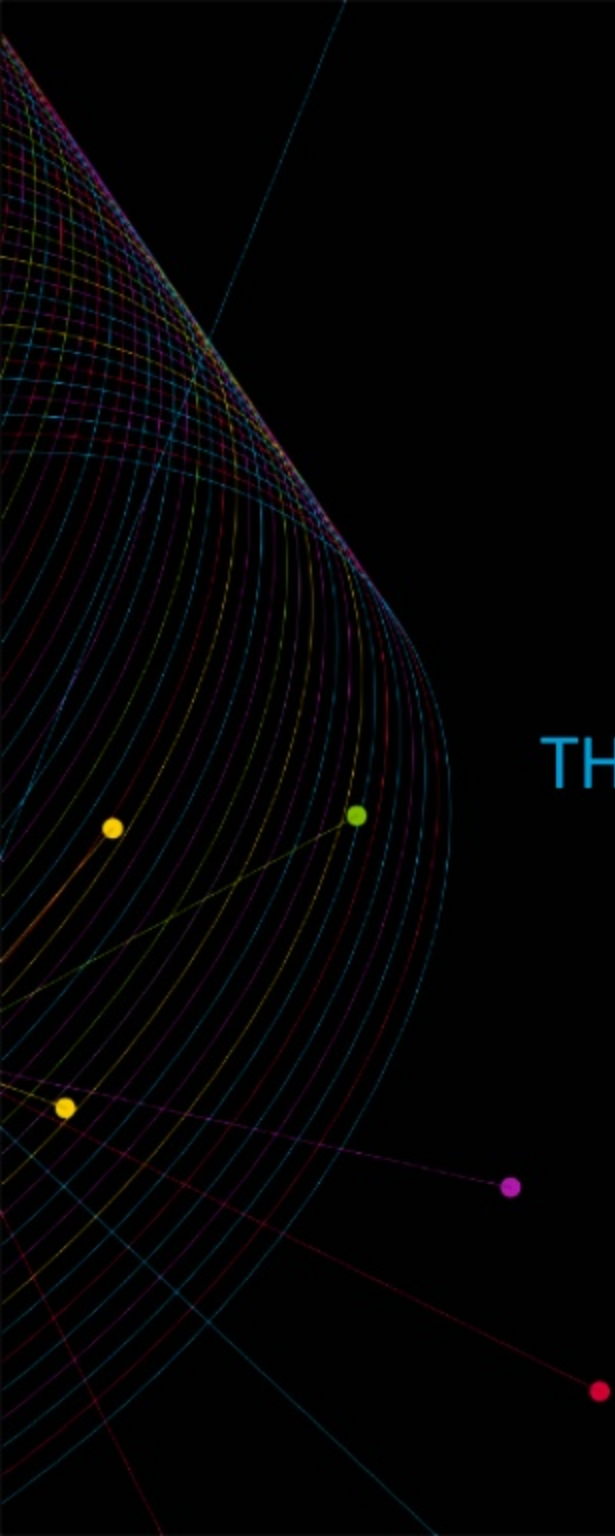
Rank	Artist	Title	Total Volume (000)	Album Share	Song Sales Share	On-Demand Audio Stream Share
1	TAYLOR SWIFT	1989	1,608	67%	33%	0%
2	DRAKE	IF YOU'RE READING THIS	1,250	71%	13%	16%
3	ED SHEERAN	X	1,178	52%	36%	11%
4	SAM SMITH	IN THE LONELY HOUR	1,097	61%	27%	12%
5	SOUNDTRACK	50 SHADES OF GREY	1,031	61%	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

An abstract graphic on the left side of the slide. It features a series of concentric, curved lines in various colors (blue, green, yellow, orange, red) that form a partial sphere or cone shape. Several small, colored dots (yellow, green, purple, red) are placed along these lines, with thin lines connecting some of them, suggesting a path or a network.

THE ATTRIBUTES OF A SUCCESSFUL ARTIST

N-SCORE CELEBRITY PERCEPTION

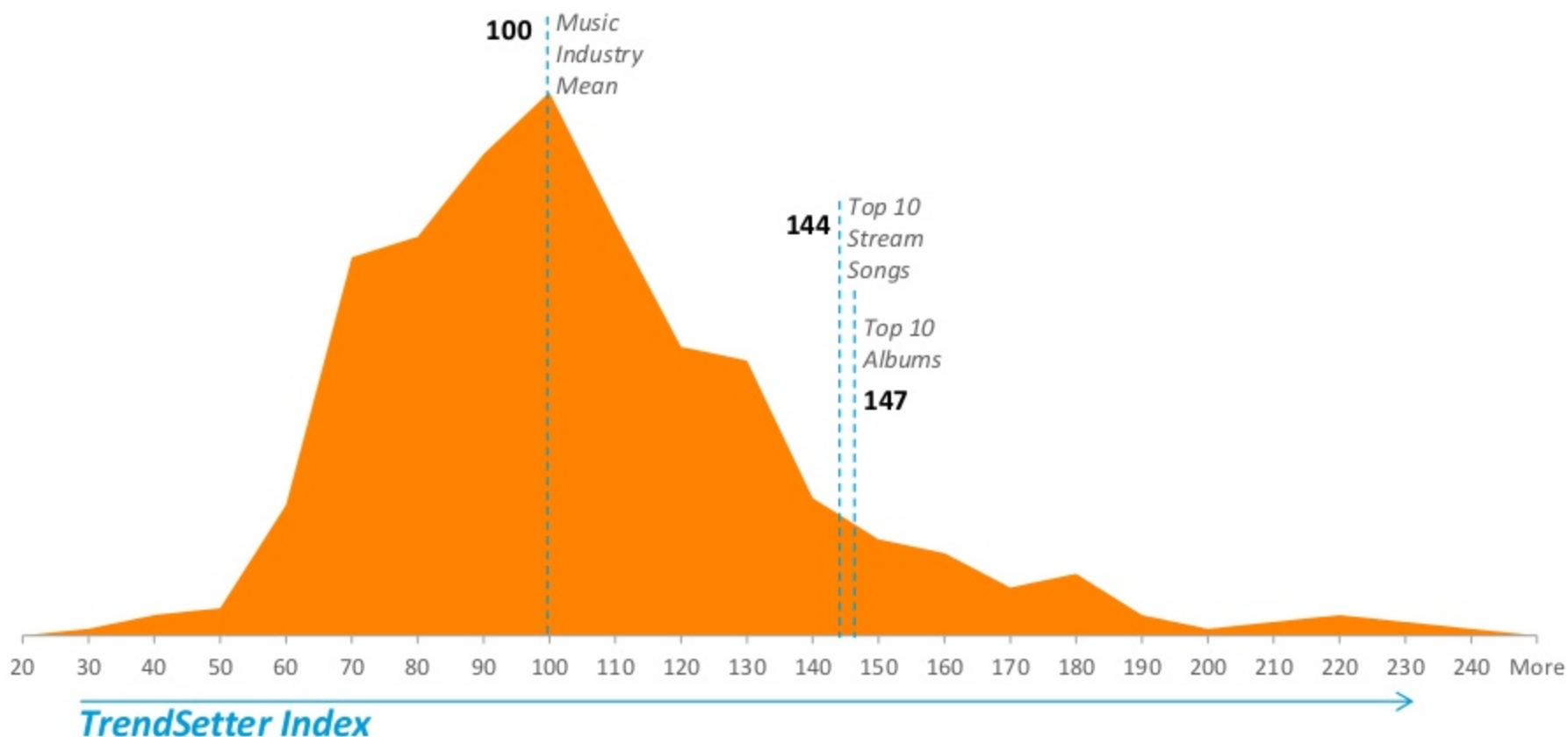
Our N-Score tool allows us to measure fan affinity and sentiment for individual celebrities – and assess their potential for brand partnerships



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