



THE PRACTICAL IMPACT OF NEW TECHNOLOGIES: PART ONE

PRESENTED BY:



CONTENTS

EXECUTIVE SUMMARY	04
VOICE CONTROL	07
MUSIC RECOGNITION TECHNOLOGY	12
CREATION TOOLS	19
DATA TOOLS	23
ABOUT ONE STEP AHEAD	29

THE PRACTICAL IMPACT OF NEW TECHNOLOGIES: PART ONE



IMPALA – the pan-European organisation promoting and supporting the independent music sector – has teamed up with CMU Insights to deliver One Step Ahead, a new digital intelligence facility to enable independent music companies across Europe to navigate and identify trends, developments, challenges and opportunities in the digital music market.

We are kicking off 2022 with a two part report exploring the impact of new technologies on the music industry, reviewing the latest trends and developments in relation to eight kinds of technology, and considering how they are impacting on the way music is made, performed, recorded, distributed, managed, marketed and consumed.

In Part One we consider voice control, music recognition technology, creation tools and data tools. Part Two will then put the spotlight on the blockchain, NFTs, metaverse, and augmented and virtual reality.

ONE STEP AHEAD: THE PRACTICAL IMPACT OF NEW TECHNOLOGIES - PART ONE

Researchers: Chris Cooke, Sam Taylor, Kaya Robertson | Produced by CMU Insights | Published by IMPALA in January 2022
IMPALA, Coudenberg, 70, 1000 Brussels, Belgium | +32 2 503 31 38 | info@impalamusic.org | impalamusic.org

EXECUTIVE SUMMARY



The history of the music industry is basically a story about how a sequence of new technologies respectively transformed the way music is made, performed, recorded, distributed, managed, marketed and consumed. And that story is, of course, ongoing.

There are numerous new and evolving technologies impacting on the way the music business operates today. Some of those technologies create challenges for the music industry to navigate or necessitate new approaches to doing business.

But many of the technologies also provide solutions to those challenges. And others still provide opportunities to create new products and revenue streams around recorded music.

Each new and evolving technology inevitably has its champions – not least the entrepreneurs and investors who are launching start-up businesses that are focused on them. This helps raise awareness of each technology but can also result in there being a lot of unwarranted hype.

Artists and their key business partners – in particular record labels – are right to be critical in their analysis of the long-term impact of each technology and quite what role it will actually play within the music industry. That role isn't always immediately apparent and might change, or at least become more clear, over time. These things need to be rigorously assessed before labels invest too much time and money into understanding and embracing the tech.

However, it's also important to stay on top of each of these technologies, both as they emerge and as they evolve. Where creators and consumers embrace a technology, labels may be forced to adapt accordingly. And where the technologies can help labels better manage, market or monetise their catalogues, it's important to capitalise on those opportunities.

In the next two reports from One Step Ahead we will explore eight key areas of technology. In this report we focus on voice control, music recognition technology, creation tools and data tools. In the next report we will put the spotlight on the blockchain, NFTs, metaverse, and augmented and virtual reality.

VOICE CONTROL

The rise of voice assistants like Amazon's Alexa and Apple's Siri has changed the way many people interact with digital music platforms, and how fans select and discover music on the streaming services.

For labels, this has an impact on how content and the accompanying meta-data is delivered to those services. While supplying extensive and accurate meta-data is important across the board in the streaming music domain, it is even more important once users are navigating a service via voice assistants. It's vital labels are consistent with things like artist names, that they make services aware of special characters, and that they engage with newer data categories like 'focus track'.

Increased consumer interest in voice control has also allowed the big platforms – especially those that have both proprietary voice assistants and smart speakers – to develop new voice-control-centric versions of their services. Both Amazon and Apple now have subscription tiers where voice control is central to the experience. These are sold at a lower price point because there is reduced functionality overall.

Some artists and labels have also experimented with creating their own products and experiences utilising voice assistants, especially Amazon's Alexa. Although to date these products and experiences have generally been marketing gimmicks rather than long-term fan engagement tools or revenue generators. However, that could change,

especially as the big tech companies evolve the monetisation options with their respective voice assistants.

MUSIC RECOGNITION TECHNOLOGY

Music recognition technology continues to evolve, both in terms of how it works and how it is used by the industry. Many user-upload services and social media now employ MRT – either proprietary systems, third party platforms or a combination of the two – to allow labels to manage and monetise their music when it is included in user-uploaded content.

Perhaps the best known of these MRT systems is YouTube's Content ID. Most labels use Content ID to generate extra income when their recordings appear in user-uploaded videos on YouTube. Although Content ID is only currently available to larger rights-owners and aggregators, which means many independent labels have to access the platform via their distributor or content delivery partner.

MRT is also being increasingly used by the music industry's collecting societies to monitor music that is broadcast or played in public.

The latter is particularly important for electronic music labels, with a number of societies around the world now specifically employing MRT at clubs and electronic music festivals. Societies often use different MRTs to the digital platforms, and labels need to make sure that their recordings are in those providers' databases too.

Some labels also directly make use of MRT services to monitor the use of their music – for example to track airplay around the world so to inform marketing and promotions activity. Plus the consumer-facing MRT services – especially Shazam – also have an important role to play in music discovery and provide good data to inform marketing campaigns.

CREATION TOOLS

Another set of new and evolving technologies impact on the music-making and content creation process itself. These include technologies that automate aspects of the music production process, automatically edit music, automatically create visuals and videos to accompany a track, and even compose original music according to criteria set by a user.

These technologies create some interesting debates for the independent music community. Many can be used by artists and labels to reduce costs associated with music production and the creation of marketing content – or to allow more ambitious projects to be achieved on smaller budgets. In this way these content creation tools create a big opportunity for music-makers and their business partners.

However, some of these technologies pose challenges too, potentially replacing human creators in elements of the music production and content creation process. Technologies that can compose and produce original music also provide audio-visual producers with another cost efficient option for sourcing music to synchronise into their videos, which potentially impacts on the sync market, and especially the production music market.

Where technology is actually composing and producing music it also raises a number of interesting copyright questions which are being actively discussed by law-makers in multiple countries. The independent music community should ensure it is part of those debates.

DATA TOOLS

With the shift to digital, the music industry is now dealing with ever increasing amounts of data. That includes the meta-data the music industry supplies alongside each track it releases, and data regarding the owners and beneficiaries of each song and recording

copyright. But also all the data that comes into the industry, including usage and financial data from digital music service providers, and the fan data that can be gathered from streaming platforms, social media, digital advertising and many other places.

Managing and processing all that data is a major challenge. However, there are now a number of data technologies available to help artists and labels with this all important task.

That includes platforms that help labels to process usage and financial data to account and report royalties to artists and their managers. In the streaming age, with so much usage data, this is a significant task. Plus, with many distributors – including DIY distributors – having invested into sophisticated reporting portals, the expectations of artists and managers have arguably risen in terms of this kind of reporting. Rights and royalty data tools can help labels meet those expectations.

Then there are those technologies that help labels process and analyse usage and fan data to inform marketing activity, and to build marketing insight across a label's entire roster. Music marketing is increasingly digital marketing, which is a data-driven exercise. Labels have access to fantastic data across their rosters that can be utilised to build insights that deliver real value to artists. But that requires connecting and analysing many different data sources. Fan data tools can be hugely helpful in this domain.

And finally there are talent and collaborator spotting tools. These help labels crunch usage, social and fan data to identify possible creative or marketing collaborations. Although some of these technologies have been touted as A&R tools, they arguably have a bigger role to play when it comes to identifying influencers to work with as part of marketing campaigns.

01: VOICE CONTROL



In the decade since Apple first put a beta version of its Siri voice assistant onto the iPhone, voice control has had a big impact on how consumers interact with digital content and services. It has also facilitated the significant rise of the smart speaker as one of the key devices via which people access digital platforms, and especially digital audio platforms.

According to a study of trends in 25 markets by Ampere Analysis in 2021, 32% of households are now using at least one voice assistant-controlled device. In the UK, it is 52% and in the US 49%, with the rate of ownership having increased 12% in the former and 13% in the latter since the start of 2020. That growth was likely aided in part by the COVID lockdowns resulting in consumers spending more on home entertainment devices like smart speakers.

It is true that the take up of such devices does vary from country to country – for example,

France and the Netherlands are both below the international average and growth there has been slow in the last year. However, globally growth rates continue to be impressive.

With smart speakers in particular, music has been a key part of the proposition from the start, with an Adobe Analytics study in 2018 finding that the most common voice activity among smart speaker owners was asking that music be played. And the pandemic has again increased usage, with a recent Edison survey of smart speaker owners in the US finding that 52% of 18-34 year olds were listening to more music and entertainment via their devices since the start of the original COVID lockdowns.

When we talk about voice control, we are probably most concerned with the big three global voice assistants: ie those operated by Amazon (Alexa), Apple (Siri) and Google. Though in some markets – especially in Asia – there are rival technologies that are as significant or more significant than the global players, such as the voice assistants of Baidu, Alibaba and Xiaomi in China.

Amazon, Apple and Google all manufacture devices that use their voice assistants, of

course, including their own proprietary smart speakers, the Echo, HomePod and Nest respectively.

The Amazon and Google assistants have long been available to other device manufacturers as well – including the makers of smart speakers, smart TVs and in-car entertainment systems – while Apple is now also finally allowing other companies to integrate Siri into their devices.

Music streaming services ideally need to be compatible with as many devices as possible, and to be fully compatible that means being integrated with whatever voice assistants those devices utilise. To that end services like Spotify have sought to integrate with the Amazon, Apple and Google assistants.

Possibly because Amazon, Apple and Google all also operate competing streaming services, Spotify has also been developing its own voice assistance, which it began rolling out in 2021 in some markets on iOS and Android devices, and also via the company's own proprietary in-car listening device, called Car Thing, which the company has been piloting in the US.

There are three key impacts of voice control on the music industry...

- It impacts on the way consumers interact with streaming services in terms of how they navigate a platform and discover music.
- Some streaming services have developed specific products built around voice control, in many cases to appeal to a more mainstream audience.
- Artists and labels can create their own bespoke products that utilise voice assistants like Alexa and Siri.

The impact of voice control on service navigation and music discovery

The most important impact of voice control

from a music industry perspective is how it affects the way users interact with the streaming services, both in terms of how they select and discover music, and the extent to which it reduces exposure to any one app's visual interface.

In practical terms, this increases the importance of each service's algorithm and the meta-data provided by record labels and music distributors.

When people request music through voice commands they are often less precise than when they are selecting from visual menus or typing key words into a search box. This means they are more likely to be directed to tracks or playlists by a service's algorithm.

The degree to which an artist or label can influence this process depends on the service and the specific request. Certainly the lack of transparency regarding how streaming service algorithms work – an issue discussed in previous One Step Ahead reports – is an even bigger concern as more users primarily rely on voice commands to navigate a service's catalogue.

However, there are nevertheless some specific and relatively simple things artists and labels can do to influence the process. Most of this relates to meta-data. The more work a service's algorithm is doing the more important it is that clear, accurate and extensive meta-data is provided alongside each track. There are also some specific additional kinds of meta-data which are particularly important for voice commands.

The digital music industry's meta-data standards organisation DDEX continues to evolve and enhance the kinds and categories of data that labels and distributors can provide when they deliver each recording. Of particular relevance here is the organisation's MEAD – or

Media Enrichment And Description – data sets, which include things like focus tracks, lyrics, reviews and track stats.

Focus track data is especially designed to inform the process when subscribers use voice control to request a specific artist. If a user requests an artist by typing their name into a service's search box, they would obviously then see a list of all the available music, often with the most streamed tracks listed first. With voice control, this step of the process isn't available, so the service needs to know which track to prioritise. This may be an artist's most recent release, but not necessarily. With catalogue artists especially it may be the most famous or most popular track.

Or which track to prioritise may be influenced by a more strategic decision – for example if an artist has a track being used in a high profile TV series or advert, which may have prompted the user to request the artist in the first place. The logic goes that if this is the first track the user hears after requesting the artist, they are more likely to play the track in full and then listen to subsequent selections.

DDEX itself explains that focus track data is “crucial for voice-activated services – ie which sound recording or video is to be played when a consumer asks for, for example, ‘the latest George-Ezra track’ – which may well differ from Ezra's most recently released song because of advertisement campaigns or other events”.

Voice-control centric services

There has been some discussion over the years as to whether there is a space in the market for distinct streaming services where voice control is the central or exclusive interface, and the primary device is a smart speaker or a smart TV, rather than a smartphone or computer. Some have suggested that this might be an attractive proposition for more mainstream consumers who are yet to embrace music streaming.

To date such standalone services that prioritise voice control haven't really gained traction. However, both Amazon and Apple have now developed mid-price versions of their respective streaming services that are restricted to certain voice-controlled devices.

In the case of Amazon, a 3.99 version of its Music Unlimited service is available via which a subscriber can access music on a single Alexa-powered Amazon device – either an Echo smart speaker or a Fire TV device. The service is then primarily controlled by voice commands, with some functionality via the Alexa app.

The recently launched Apple Music Voice Plan is a 4.99 version of the company's streaming service that can only be accessed via the Siri voice assistant on Apple devices. Described as “a cheaper, voice-only option for music streaming”, subscribers on this voice plan do not have access to the Apple Music app.

Obviously, one ongoing debate in the music community is that the standard price point for streaming is currently too low, with the baseline price of 9.99 euros, dollars or pounds having been in place in many markets since the late 2000s. And many services have pursued subscriber growth through mobile bundles, family plans and student packages that discount from that 9.99 a month baseline.

Given the music industry ultimately has revenue share deals with the streaming services, price points directly impact on how much money artists and labels make from the streaming of their music. Therefore some people have expressed concern about the introduction of mid-price subscription tiers.

However, both Amazon and Apple argue that their voice control centric mid-price services primarily appeal to a different kind of consumer than their full 9.99 packages, ie generally more mainstream consumers who only really want

to access on-demand music at home, not when they are on the move.

Therefore, the argument goes, the introduction of these packages expands the audience for premium streaming, and ultimately results in more subscription revenues coming in overall, which can be shared with the music industry.

Artist-centric voice assistant products and services

When voice control on the streaming services first started to gain momentum, there was some discussion about artists and labels developing their own standalone products and services that can be accessed by making specific requests of one or another voice assistant. The different platforms use different terminology to describe such products and services, such as Alexa Skills, Siri Commands and Google Actions.

A number of artists and labels have experimented in this domain, in particular with Alexa Skills. That said, to date generally this has been done as a marketing gimmick around an album release, rather than as a way of enhancing fan engagement in the long-term or generating new revenues.

However, the tech companies continue to increase what is possible in this domain. For example, Amazon added an important extra monetisation option in 2021. Previously transactions were possible within a Skill, but you couldn't charge for access. Whereas now you can charge a one off fee to access a Skill.

So although the music industry hasn't really embraced this opportunity on a large scale to date, as these technologies continue to evolve, that could as yet change.

ACTION POINTS

- The most important take-away here is that as more and more subscribers use voice control to access music services, employing best practice for delivering content and meta-data is even more important. Amazon provides a number of specific tips in relation to Amazon Music and Alexa, which are summarised on the next page.
- With voice control being a particular priority for Amazon, the company's Amazon Music For Artists portal provides specific data about voice requests on its platform. This is a useful resource for getting a better understanding of how people interact with streaming services when utilising voice assistants and might inform the kind of meta-data labels provide around an artist or release.

TALKING POINTS

- There remains a lack of transparency around precisely how the streaming service algorithms work. This is a problem across the board, but is even more significant when voice commands are being employed. Therefore the independent music community should continue to put pressure on the streaming services to be more transparent about their algorithms, and how artists and labels can influence them.
- Apple and Amazon argue that offering mid-price subscription tiers that have voice control at their heart attracts more mainstream consumers and therefore expands the reach of premium streaming. Given the ongoing debate around streaming service price-points and the need to grow the 'total digital pie', do artists and labels see mid-price tiers as a problem or a solution?

DATA AND DELIVERY TIPS TO MAXIMISE VOICE CONTROL IMPACT

Amazon provides specific guidance for how labels can ensure that they are delivering their content and meta-data in the best possible way for those subscribers accessing music via voice control. Although this advice is obviously specifically relating to Amazon Music and Alexa, it also describes best practice for all services and voice assistants.

Meta-data

■ Providing extensive and accurate meta-data is, of course, important across the board when it comes to delivering music to streaming services, though this is particularly true once voice control is being employed. Meta-data that Amazon specifically identifies as being important for voice control includes original release date, version info, genre and sub-genre information, and clean/explicit flags. And of course, focus track data is very relevant here too.

■ Consistency is also important – in that labels should always provide exactly the same data for each release at all times to all services. They should also ensure that things like artist name are always provided in the exact same way. Where artists have music released or distributed by multiple different labels, each business partner should ensure that they are using the same precise artist name on each release.

Special characters

■ Amazon notes that Alexa “can be challenged with such tasks as handling, understanding, and reading special characters – good examples of this would be artist names 6LACK, !!!, or P!nk”. Where artist names or track titles have special characters, it is advisable to approach the label relations teams at each service – either directly or via a distributor – to make them aware of these characters and to identify the best way to help a voice assistant meet the challenge.

Timelines

■ Delivering new music to streaming services as early as possible ahead of release is particularly important when it comes to voice control. Amazon states that “Alexa needs time to learn about your music – because of this, music delivered at the last minute is more likely to be problematic”. That said, providing music is delivered no later than one week before release, things should be OK.

Duplicates and re-deliveries

■ Amazon advises that having multiple versions of the same albums or songs on its platform – or re-delivering music with content or meta-data amendments – can negatively impact on a track’s performance with voice control. Where possible these things should be avoided.

■ Though multiple versions can usually be dealt with by using titles and other meta-data to clearly sign-post the different versions. And where re-deliveries ahead of release are unavoidable, trying to ensure that this doesn’t happen too last minute will reduce the negative impact.

02: MUSIC RECOGNITION



Music recognition technology isn't new, Shazam having originally launched in 2002. However, how the technology works and how it is employed by the music industry has evolved a lot over the years, and it continues to evolve, with existing players refining their tech and new players entering the market.

Different MRT systems employ different approaches in order to recognise and identify any music that is contained in the audio files, video files, broadcasts, webcasts or performances that they monitor.

A common approach is to first allow labels and distributors to upload recordings into a central database alongside some key meta-data, and to then generate a unique 'finger-print' representing the key features of each track. Then when the system is subsequently exposed to recorded content, broadcasts or performances, it will scan the audio

looking for anything that matches a finger-print in its database.

Many of the developments in MRT have been focused on making the matching process more efficient and more accurate. And also to enable matches in more challenging scenarios, such as when only a clip of a track is used; or when a track has been changed in some way, for example within a mix or during a DJ set; or when an alternative version of a track is used; or when there is background noise to deal with.

The MRT challenge is also obviously much bigger when it comes to recognising songs rather than recordings.

Whenever a recording is matched, an MRT system can seek to also identify the accompanying song based on the meta-data already attached to that recording. However, what if the system is trying to match a new, cover or live version of an existing song, meaning there is no recording of that specific version in the database?

Most MRTs are primarily focused on – or at least perform much better when – matching previously known recordings, rather than new, cover or live versions of songs. However, many of the leading MRTs are also seeking to enhance their technologies so that they are more efficient and more accurate at recognising and matching songs as well. Progress has been made, though given how many variables there can be in new, cover or live versions, there is still plenty of room for improvement.

MRT is used in a number of different ways by the music and digital sectors, including...

- To identify and match music uploaded by users to digital platforms, in order to allow copyright owners to manage and monetise their music on those platforms.
- To monitor music being played on radio or

TV networks, for both royalty distribution and marketing purposes.

- To monitor recorded music being played in public spaces – especially clubs – for royalty distribution purposes. This could also be extended to live performance in the future.
- To identify recordings included in mixes for licensing and royalty distribution purposes.
- To create consumer facing music recognition services which can aid in music discovery.

Digital Platform Content Matching

Many user-generated content, video sharing and social media platforms employ music recognition technology that checks content uploaded by their users in order to identify if it contains any music controlled by third parties. Platforms employ this technology for legal, licensing and monetisation reasons.

Legally speaking, these platforms have certain obligations to copyright owners as a result of copyright law. And in Europe, the obligations of user-generated content platforms have been reinforced since the adoption of the EU copyright directive in 2019.

Many platforms meet these obligations by employing MRT – although there are commercial as well as legal reasons for embracing such technology. Many digital services ultimately seek to form business partnerships with the music industry, and potential licensing partners will usually demand some sort of MRT is employed as part of any licensing deal.

Record labels, music distributors, music publishers and collecting societies will make that demand for at least two reasons. Firstly, because they want to be able to more easily manage their music on each platform.

And second, so that music usage can be monitored to inform payments. The royalties paid to the licensing partner may be directly

linked to usage, but even where a platform pays a lump sum fee per year, both platform and licensing partner will likely want to assess overall usage in order to inform future licensing negotiations.

Most digital platforms utilise third party MRT solutions, partly because building such technology from scratch is a major challenge, and second to reassure licensing partners that their monitoring and matching will be effective. MRT providers in this domain include Audible Magic, Pex and Gracenote. However, some platforms ultimately seek to build their own proprietary systems – the most significant of which is YouTube’s Content ID platform.

Media Monitoring

Some MRT solutions are predominantly focused on monitoring the use of music on broadcast media channels, whether that’s TV, radio or basic webcasting services. MRT technology may be used in this way for both royalty processing and marketing reasons.

It is often collecting societies that issue music licences to broadcasters. Some societies make use of MRT services in order to monitor the output of radio and TV stations, in order to identify what music those broadcasters have used, so that the royalties paid into the system by the broadcasters can be more efficiently and accurately paid through to a society’s membership.

Some societies and rights-holders will also employ this technology in order to audit usage in other markets where royalties are actually being collected and distributed by partner organisations.

MRT-based media monitoring services can also be used for marketing purposes, mainly to monitor radio airplay for any one track. By employing MRT in this domain, artists and labels can more efficiently and more

extensively track what stations are playing their music around the world, both to assess the success of any one radio promotions campaign, and also to identify potential champions within the radio sector.

Performance Monitoring

One area where MRT is starting to play a significant role in the music industry is in the monitoring of public performance – so when recorded music is played in public spaces like bars, cafes, gyms, shops and clubs.

Prior to the COVID-19 pandemic, the money generated from this use of recorded music was another growth revenue stream for the music industry. However, the customers of public performance licences are generally unsophisticated users of music who are unlikely to be able to provide extensive if any usage data.

This means that the collecting societies which usually administer this revenue stream often need to employ generalisations and approximations in order to distribute this income to their members, ie artists, labels, songwriters and publishers. However, such distribution policies can be controversial.

If collecting societies place small devices with MRT installed within the premises of the businesses that make use of music, much more accurate and extensive usage data can be gathered in order to calculate what royalties any one performer, writer or rights-owner is due.

That said, installing and maintaining MRT devices in the premises of the hundreds of thousands of businesses that play recorded music is a major undertaking. So, to date, those collecting societies that have been pursuing this approach have generally focused on a relatively small number of premises.

A particular priority has been club venues. This is partly because a nightclub may have a very specific music policy that is distinct from other users of music. This means that employing generalisations and approximations to distribute royalties paid into the system by clubs can be particularly unfair.

However, while the use of MRT to monitor public performance may have been limited so far, as MRT devices become ever more affordable, some anticipate this approach being employed much widely by collecting societies in the next decade, in a wider variety of premises and businesses. Indeed, some MRT companies and start-ups see this as a major opportunity.

On the songs side, the collecting societies could also employ MRT to monitor and track live performances.

Although there is generally more usage data already available when it comes to live music – not least because artists who perform their own songs at gigs and concerts often report that usage themselves – a significant portion of the royalties paid by venues and promoters is still not accurately matched to specific songs.

However, it is debatable how effective MRT currently is in this domain, given how much harder it is to identify new, cover and live versions of songs, where those versions might differ significantly from any commercially released recordings of said songs that are stored in an MRT provider's database.

That said, many MRT providers have been investing heavily in developing their technologies so that they can perform this particular task, and there are some MRT start-ups where this is the specific focus. Though, to date, MRT has been most prolifically employed at dance and electronic music events, where it is pre-existing recordings rather than true live performances that are generally being tracked.

Mix licensing

One interesting usage of MRT in the streaming domain relates to mixes and mix albums.

Some feel that there is a big potential opportunity in this domain – especially in electronic music genres – to make it easier for DJs, labels and bedroom producers to make mixes available on the streaming services in a way that would benefit both those who create the mix and the artists and labels behind any music included in said mix.

There are various challenges to be met to truly capitalise on this opportunity, but one of those challenges is easily and accurately identifying what music is contained in any one mix.

It is generally agreed that MRT has a key role to play here. Both Apple and Spotify have recently launched initiatives to expand the range of mixes on their services, and Apple in particular is using MRT – specifically Shazam – to facilitate this expansion.

Consumer Facing Services

In addition to all the business-to-business uses of MRT, there are – of course – the consumer facing services, of which Shazam, now owned by Apple, is the most significant.

According to Apple, Shazam now boasts more than 200 million monthly active users, and those users are 'tagging' – so using Shazam to identify – more than one billion tracks per month.

Services like Shazam play an important role in music discovery and also provide valuable data to monitor the reach of any one track.

To that end, it is important that artists and labels make sure their new music is delivered to the databases of consumer-facing MRT platforms as soon as possible ahead of release.

ACCESSING YOUTUBE'S CONTENT ID

One of the best known recognition technologies within the music industry is probably Content ID from Google's YouTube, which allows copyright owners – including record labels and music publishers – to track and manage the use of their content in videos uploaded to the main YouTube platform.

Once a track is logged with the Content ID system, any videos that contain that track should be automatically identified. The owners of the copyrights contained in the track – ie the recording rights and the accompanying song rights – can then choose to either block the content or to monetise the content. If the latter is chosen, then YouTube will share advertising income linked to the video with the relevant labels, publishers and collecting societies according to the terms of their licensing deals with the platform.

Having been first piloted in 2007, YouTube's Content ID is now a very sophisticated recognition technology. No MRT is 100% perfect of course, but Content ID has a very good rate of success in identifying content, especially for recordings. And for many artists and labels, monetising user-generated content is an important extra digital revenue stream, in addition to revenues from their official content on YouTube.

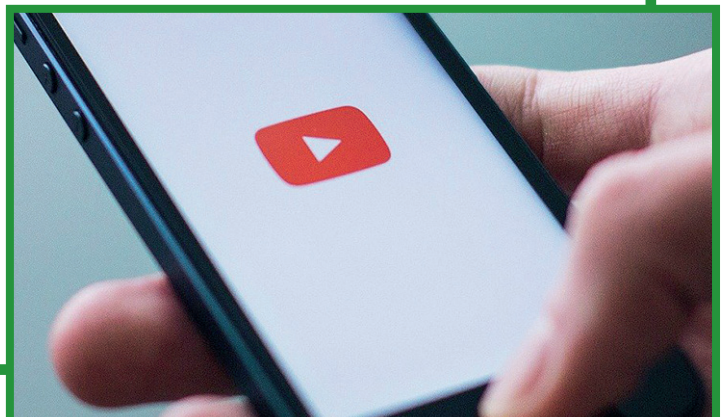
Although one issue for independent artists and labels is getting access to Content ID. YouTube has certain criteria and minima that a rights-owner must meet to qualify for access, which means smaller rights-owners may not be able to directly use the tool, instead needing to ally with a larger aggregator that already meets that criteria.

This has proven controversial. So much so, in the US there has been legal action led by independent musician Maria Schneider seeking to force Google to extend access to Content ID to a wider range of creators and rights-owners. In that legal battle, Google has argued that Content ID is a very powerful tool – in that it allows copyright owners to block and monetise other people's videos – and therefore it needs to be careful who it grants access to. For various reasons that legal battle has become rather complex and it is still working its way through the courts.

YouTube does also offer another service called the Copyright Match Tool. This is more widely available and will also identify videos that contain another creator or rights-owner's content. That creator or rights-owner is alerted to any matches identified by the tool and they can then request the matched video be removed or send a message to the person who uploaded it.

In summer 2021, YouTube announced it was extended access of this tool to more creators and rights-owners. However, as most labels prefer to monetise videos containing their music – rather than requesting they be removed – the Copyright Match Tool is generally not so useful for the independent music community.

Therefore those independent labels unable to get direct access to Content ID will usually seek to get access to the platform via a business partner. Most music distributors provide YouTube monetisation via Content ID for their clients – as do most of those companies who provide standalone content delivery services for labels that utilise direct or Merlin deals with the platforms.



MRT SERVICES OVERVIEW

Although some digital platforms have developed their own music recognition technology, many rely on third parties to facilitate some or all of the matching process. Companies providing services of this kind include **Audible Magic**, **Pex** and **Gracenote**.

Some platforms simply want to comply with their legal obligations under copyright law and therefore utilise the third party MRT to block unlicensed content. Though many ultimately want to license and monetise music on their platforms in one way or another, and may well look to their MRT provider to help with the monetisation process, both technically and sometimes in terms of licensing as well.

Although some of these MRT providers also sell various services to music companies, for many labels the main priority is ensuring that their recordings are in the databases operated by these providers. This may involve the label having a direct relationship with the MRT company – or they may deliver their content via a distributor.



Audible Magic – whose clients currently include Facebook, Instagram, Soundcloud, Dailymotion, Twitch and Roblox – says in its pitch to rights-owners: “Audible Magic is the leader in protecting and managing your digital content across social media and user generated content platforms. Social media and UGC platforms integrate Audible Magic services at point of ingestion. Audible Magic notifies the platform of matches to your copyrighted content”.

Many collecting societies now also work with MRT providers to monitor music being used by broadcasters or in public spaces.

When it comes to monitoring the public performance of recorded music, electronic music labels have been particularly vocal about the need for this technology to be employed in clubs and at relevant festivals, so to ensure more accurate reporting and royalty distribution. Many of these labels believe that the royalty distribution policies employed by collecting societies in the absence of accurate usage data are prone to skew against them.

To that end, the Association For Electronic Music has been lobbying for MRT to be more widely used by collecting societies since 2014 – at clubs and festivals, as well as with livestreamed DJ sets – via its Get Played Get Paid campaign.

It states: “Clubs, festivals and digital services all over the world pay music rights licence fees to [collecting societies] for the music played at events or streamed online, but attaining accurate DJ setlist information about what is being played has, historically, proved a challenge for these organisations”.

“However”, it goes on, “in the years since our Get Played Get Paid campaign began we have seen the number of territories in which [societies] now utilise [MRT] at DJ events, to enable identification of the tracks played and more accurate royalty payments, grow from three to seventeen territories globally”. AFEM has relationships with four specific MRT providers in this domain: **BMAT**, **KUVO**, **YACAST** and **DJ Monitor**.



UK collecting societies PPL and PRS are among those that work with DJ Monitor to track music being played in larger club venues. Explaining how it works, the societies say: “A discrete monitoring device is installed at a suitable location in

a venue. The device listens to the music a DJ plays and analyses it against a database of millions of individual sound recordings, creating highly accurate setlist information”.

DJ Monitor is also one of the MRT providers that has recently put a focus on monitoring livestreamed DJ sets, spotting an opportunity as the popularity of livestreamed events boomed during the COVID pandemic. Explaining that service, DJ Monitor says: “Since 2020, we can facilitate the livestreaming of your physical event, integrating the online and offline experience, and make sure the monitoring, online transactions, international licensing, and live streaming to your audience is arranged”.

Some MRT providers primarily sell services to music companies, and that includes WARM, which monitors music being played on radio stations across the world. Designed for independent artists and labels, most clients use WARM to inform marketing and promotions activity, although it can also be used for auditing the royalties received from collecting societies for airplay.

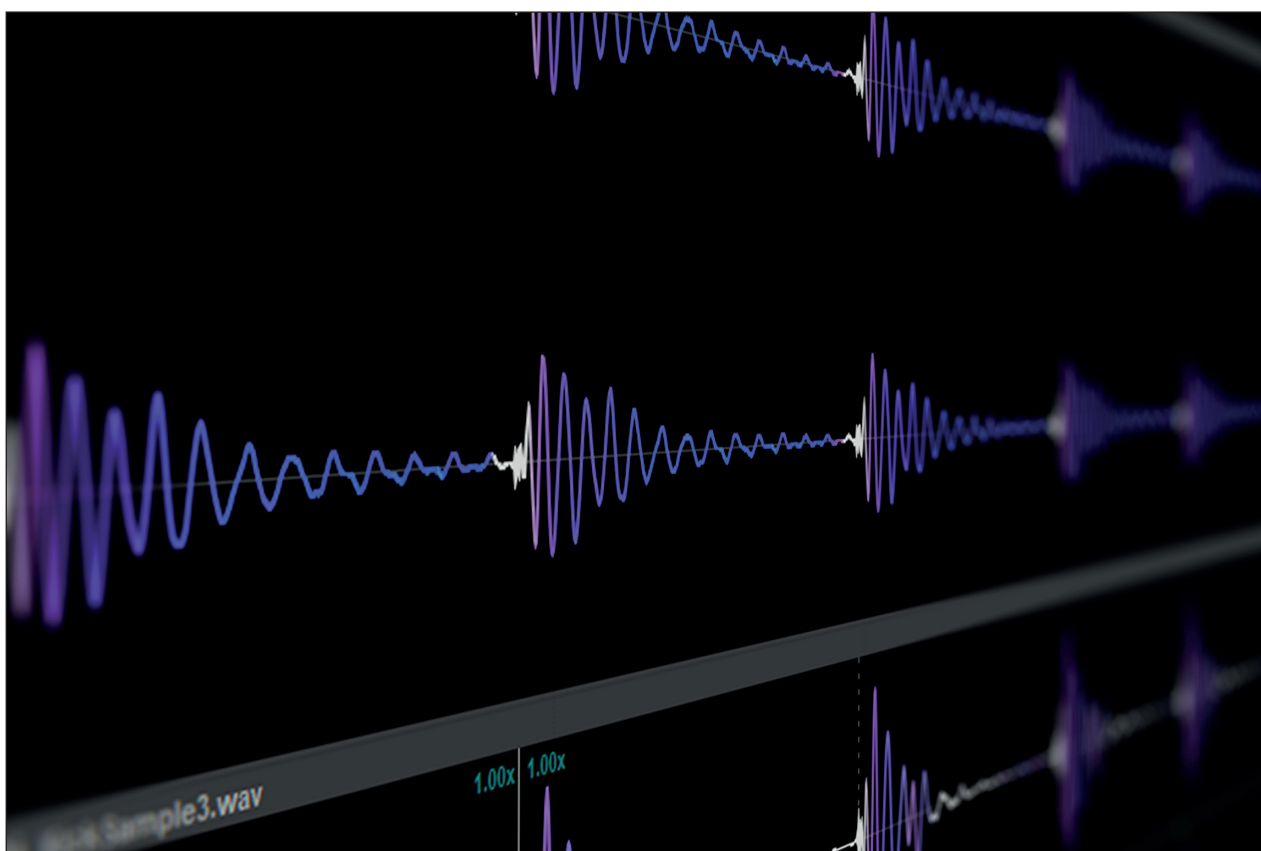
Pitching its service to labels, the company says: “By monitoring radio stations worldwide, WARM provides you with detailed reports allowing you to discover where and when specific songs are getting radio airplay. You'll find the potential of our data to be top-notch to design strategic marketing campaigns that will solidify your business growth”.

The logo for WARM, featuring the word "warm" in a stylized, lowercase, orange font.

ACTION POINTS

- Labels need to be aware of all the different MRT services being employed by the digital platforms they have licensing deals with and the collecting societies which are licensing their rights for broadcast and public performance. It's crucial that labels are delivering their music to the databases of all of these MRT platforms, plus consumer-facing services like Shazam.
- Where a label is working with a distribution partner, that distributor is likely already delivering content to the MRT databases used by any of the digital services it has licensed. They will also often be delivering tracks to the consumer-facing services like Shazam.
- A distribution partner may not be delivering music to the MRT services utilised by the record industry's collecting societies. Where that is the case, the society should be able to advise the best way to deliver music to the relevant MRT platform. As a starting point, labels should ask any collecting societies they are direct members of what MRT services, if any, they are making use of. Some MRT platforms will only accept music from approved partners, in which case an intermediary may be required. Again, each society should be able to advise on the best way to get recordings into the relevant databases.
- Labels should ensure that new music is delivered to all and any relevant MRT services as soon as possible as part of the release planning process, so that music is being tracked as soon as it is first broadcast, played or utilised – which, of course, could be before the release has been officially made available on the streaming services.
- Labels may want to investigate whether any MRT solutions can help them in their business, for example providing more extensive media monitoring, either to help audit royalty payments or to inform marketing activity.

03: CREATION TOOLS



Another set of new and evolving technologies impact on the music-making process itself. There are a wide variety of tools in this domain, some aimed at professional musicians and producers, others at music-marketeers and DIY music-makers, and others still offering alternative solutions to users of music, in particular producers of audio-visual content.

These include technologies that...

- Automate aspects of the music production process, including mastering.

- Automatically edit music, for example in order to fit with video content.
- Automatically create visuals and videos to accompany a track.
- Compose and produce original music according to criteria set by a user.

Needless to say, opinion is divided regarding the extent to which these technologies can replicate what human performers, producers, sound engineers, editors, composers, graphic designers and video makers can achieve.

There has also been some debate over whether these technologies simply provide tools for those human creators, or whether they could ultimately replace some or all of the people involved in the music-making process.

Which is to say, to what extent are they valuable

tools for music-makers and other creators within the music industry, and to what extent do they pose challenges?

Use of creation tools within the music community

For independent music-makers and their labels, some of these technologies can help reduce the cost of producing music and creating marketing content to accompany releases – or allow more ambitious projects to be achieved on smaller budgets – and in that respect they definitely create an opportunity for those artists and their business partners.

Although, at the same time, they could be seen as a challenge to some creators within the music community – for example producers, sound engineers and session musicians – whose services they may sometimes replace.

Obviously significantly more music is being produced overall today – especially when the DIY artist community is taken into account – and significantly more marketing content is required alongside each release.

Creation tools like those described above help to facilitate this increase in the overall amount of content being produced, by making some of that output more cost efficient.

However, arguably – with the industry's key recordings and release campaigns – these tools are not really replacing human creators. However, as such tools are more widely employed across the industry – and as the technologies themselves evolve and become more sophisticated – that could change.

Of course, even if that happens, where artists and labels are employing creation tools, there are both winners and losers within the music industry. So the tools are an opportunity for one set of creators even as they are a challenge to another set of creators.

Use of creation tools by audio-visual producers

However, some of these creation tools could pose a challenge for the wider music industry, in that the beneficiaries of any cost savings are mainly outside of the sector itself. That's particularly true with those technologies that automatically compose, produce and record original music according to specifications set or video files uploaded by a user.

This provides another option for audio-visual producers seeking music to synchronise into their productions, and therefore potentially is a competitor to the sync side of the music industry – both the traditional sync business and also within the ever-expanding online creator domain.

To date, music composition technologies of this kind are mainly a competitor to production music libraries. In that they are best suited for creating relatively simple instrumental soundtracks for basic audio-visual productions.

The USP of such technology is that it can provide simpler and cheaper options for music to soundtrack a video, just like production music. However, unlike production music, where tracks are often licensed to many customers, with music composition technology the customer gets something unique.

Although such technologies still seem pretty niche today, they are getting more sophisticated all the time, and seem likely to play an ever more important role in music-making in the future. To what extent music made by these technologies – for audio-visual productions and beyond – will ultimately become a competitor for the wider music industry remains to be seen.

Copyright questions when technology composes and produces music

Those technologies able to automatically

produce and compose new music with minimal human involvement also pose some interesting copyright questions that are being increasingly debated within the legal community.

Copyright law has traditionally assumed that human beings are involved in the creation of protected works like songs and recordings. Once machines do all – or at least the vast majority – of the work involved in composing and producing music, does copyright protection still apply?

Some would argue that songs and recordings created by such technologies should enjoy all the same protections as songs and recordings created by human beings.

But others disagree, with some even suggesting that copyright law could be used to protect human creators from the new competition created by creation technologies of this kind, by providing machine created works with restricted protection, or maybe no protection at all.

Even where people agree machine created works should enjoy copyright protection, there are still a number of debates to be had. For example, who is the default or presumed first owner of works created in this way? Is it whoever created and/or owns the music creation tool? Or is it whoever uses and instructs the music creation tool?

Now, on one level the default ownership rules in copyright law might be irrelevant here, because the terms of service put in place by the provider of the music creation tool might dictate ownership of the rights in any music that is created.

However, with musical compositions the copyright term – ie how long protection is provided for – is linked to the original creator's lifetime. Whose lifetime is the machine-created composition linked to? Or, as with recordings, would the copyright term in this scenario be a set number of years after release?

Some copyright systems, such as the UK, already have some provisions in place that anticipate these questions, but many copyright systems do not. And even where there are some pre-existing provisions, as these technologies become more sophisticated and more widely used, it feels like further debate is required involving creators and copyright owners, those developing these technologies, and law-makers, to decide how copyright law should deal with these innovations

Indeed, that very debate is now underway in many countries around the world – and on a global basis too via the World Intellectual Property Organisation – and the independent music community has an important role to play in those ongoing conversations.

TALKING POINTS

- To what extent can music creation tools be employed by professional musicians and their business partners, like labels, to reduce the costs of the music-making process? Do they particularly help music-makers working on tighter budgets? Can they help labels meet the challenge of having to create ever more marketing content around releases?
- Which music creation tools create an opportunity for the music industry, and which pose a challenge? Can copyright law – which essentially exists to protect human creativity – be employed to combat the challenges? Which is to say, should machine created music enjoy the same copyright protection as human created music?

CREATION TOOLS OVERVIEW

One notable creation tool that helps with the music-making process is **LANDR**'s automated mastering service. First launched in 2014, this technology was built and developed by analysing the workflows of professional mastering engineers and a large library of mastered tracks.



In its official pitch, LANDR notes that mastering "lets you share your music the way it's meant to be heard with consistent, professional sound across different devices and streaming platforms", adding that with its technology "that process is always fast, easy and affordable with instant, professional results every time".

In 2021 the company launched an upgrade to its technology called Synapse, saying at the time: "With years of research, 19 million mastered tracks and over 1 million hours of music, Synapse is the most sophisticated AI-powered mastering engine yet".

Of course, we can debate the extent to which automated mastering really compares to the work undertaken by a professional mastering engineers, but tools like those provided by LANDR provide an affordable option especially to the DIY artist community. Indeed, while LANDR began exclusively focused on its automated mastering service, it has since launched various other services aimed at DIY musicians.

Another interesting company in the creation tools space is **AI Music**. It first came to attention with a technology that can automatically remix and adapt a track so to change its genre or tempo. However, since its launch it has also created a number of other related products mainly providing services to brands and app makers.



ventureSONIC

Its most recent new product aimed at brands, called **VentureSonic**, combines both human and machine created elements. The company explains that:

"VentureSonic AI works by using thousands of elements created by artists and producers to intelligently produce customised tracks. The first generation of the product allows any user to have control over mood, genre, instrumentation, tempo and duration without the need for specialist production or technical knowledge".

Its official pitch then states: "This allows for seamless customisation for use with any kind of video or audio media asset, making it easier to contextualise music across the myriad use cases modern brands need. Marketers will have a powerful tool that gives them branded music tracks across styles and genres at the touch of the button".

Another creation tool start-up that seeks to combine human and machine creation is **Algoriffix**. In this case the customer of the tool is the music-maker, in that the technology doesn't replace the human creator but seeks instead to support and help them with the music-making process. The company says its mission statement is "to boost your musical creativeness with digital signal processing, machine learning and artificial intelligence".



Further addressing the music-maker, Algoriffix adds: "Simply upload your unaccompanied solo or stem and let our algorithms recognise notes and recommend the meter and harmony that fit best your performance or suggest alternatives. Fast, reliable, and versatile – Algoriffix will unlock your hidden potential and help you innovate within seconds!"

A creation tool that seeks to support artists and labels in the creation of the visual content required to support releases is **Rotor**. Its platform specifically helps in the creation of music videos and lyric videos, as well as visual content for posting to YouTube and Spotify, ie ArtTracks and Canvas.



In its pitch to labels, Rotor says: "Fans now consume 47% of music through on-demand video and music videos account for 93% of YouTube's most-watched videos. If you're not regularly publishing video to feed that demand, you're giving up market share. With Rotor Studio, you could be publishing 30 plus new music videos to your social channels each month with zero effort".

04: DATA TOOLS



With the shift to digital, the music industry is now dealing with ever increasing amounts of data. That includes the meta-data the music industry supplies alongside each track it releases, and data regarding the owners and beneficiaries of each song and recording copyright.

But also all the data that comes into the music industry, including usage and financial data from digital music service providers, and the fan data that can be gathered from streaming platforms, social media, digital advertising and many other places.

The music industry is increasingly a data-led business, and labels need to be fully on top of all this data in order to properly manage their catalogues, market their releases, and identify opportunities. This requires finding ways to access, store, compare, analyse and share the numerous sources of data that are now available to each music company. A number of data technologies are now available to help with this process.

These data technologies include...

- Those which help labels process usage and financial data to account and report royalties to artists and their managers.
- Those which help labels process and analyse usage and fan data to inform marketing activity, and to build marketing insight across a label's entire roster.
- Those which help labels crunch usage, social and fan data to identify possible creative or marketing collaborations.

Rights & Royalty Data Tools

As the record industry has shifted from a sales-based business to a consumption-based business, managing rights and processing royalties has become a much bigger task for everyone in the business.

Every digital platform provides extensive usage reports on a monthly basis with countless lines of data, which can often relate to relatively small sums of money. For labels, processing all that data, calculating what royalties need to be paid to artists, and then reporting all that information to artists and their managers, is a major task.

Meanwhile, the artist community is becoming more demanding regarding the way labels process and report revenues. This is partly because many distributors – including the DIY distributors – have invested heavily in building portals to provide this information in a very timely and accessible way. Because most artists

start working with distributors before signing to labels, expectations have been raised.

A number of start-ups have entered the market providing off-the-shelf data platforms that can automate royalty processing and reporting for labels, helping them meet these rising expectations within the artist community.

These platforms are designed to take reports from the streaming services – either uploaded by their clients or directly pulled from the services – and then process the data in those reports, and allocate data and monies to individual recordings and artists. Labels can then often input royalty and contract information relating to each artist, so the system can calculate and even report in real time what royalties any one artist is due.

Fan Data Tools

As explained in the One Step Ahead report 'Marketing Power Through Data And Networks', artists and labels now have access to a large variety of fan data. This data allows those artists and labels to profile the fanbase, assess the success of marketing activity, target messaging, and even profile the individual fan.

As a result, a key aspect of music marketing today is processing all the fan data that comes in, putting that data side by side, and using it to gain insight into what kind of marketing activity works for different artists, and what platforms, content, messaging and networks should be employed around any one release.

When done effectively, this greatly increases the value a label can bring to any one artist's marketing campaigns.

Partly because, through doing this work day-to-day, labels become experts in utilising fan data to inform marketing activity. But also because a label can access data and gain insight from across their wider roster, meaning every artist

they work with benefits from insights gained from every other artist's past marketing campaigns.

However, aggregating and analysing this fan data can be a challenge. Fan data platforms exist to help with this process, pulling in data from multiple sources, and presenting it in a way that makes it much easier to identify insights. Some distributors also provide portals that can help labels in this domain to an extent, especially when it comes to streaming data. Although, the more kinds of data a portal can pull in the better, which can make third party platforms more attractive.

Talent & Collaborator Spotting Tools

One final group of data technologies being employed in the music industry relates to

talent scouting and the matching of artists with possible collaborators, especially online influencers and brand partners.

These are platforms that pull in generally publicly available data from an assortment of platforms – especially social media – and which seek to identify which artists and creators are gaining particular traction in specific areas or markets, and also to spot trends that make potential collaborations more attractive.

Although some in the industry use these tools for A&R purposes, arguably they are becoming more powerful as marketing tools, particularly as influencer partnerships and collaborations on platforms like TikTok and Instagram become a key part of many music marketing campaigns.

ACTION POINTS

- Labels should consider how they are currently managing rights and royalty data – aware that the expectations of artists and managers are increasing in terms of how their label partners report financial and royalty information. Where labels are still using manual systems it may be worth investigating to what extent data tools on the market could be used to make this process more efficient and to meet the rising expectations of artists and managers. These tools may also allow for easier management of assets, and copyright data and contractual information.
- Labels should also consider how they are currently gather, analyse and utilise fan data – including data from streaming services, social media and other digital channels. The effective use of this data – for each release and across the roster – is now a key way in which labels deliver real value to artists in terms of marketing, and the use of fan data tools might increase effectiveness.
- Labels considering influencer marketing campaigns but on tight budgets might want to investigate tools that facilitate finding and connecting with appropriate influencers. This almost certainly requires experimentation on the label's part, to assess the potential return on investment, both in terms of using these tools and any monies spent with the influencers themselves.

TALKING POINTS

- With the need for more transparency part of the ongoing debate around the digital music market, what could labels do to increase transparency around royalties and fan data, and how can third party platforms help deliver that transparency? As many distributors raise expectations among artists in this domain, do labels need to invest to stay competitive within the talent marketplace?

DATA TOOLS OVERVIEW

Curve

Companies providing tools for managing rights and royalties include **Curve**, which describes its platform as being "built from the ground up by music royalty experts to provide a powerful but easy to use solution for processing royalties related to masters and publishing rights".

The platform is designed to take reports from streaming services, collecting societies and other business partners, and to then help labels and publishers organise and process that data. Labels and publishers can then enter information from their artist and songwriter contracts, so that the platform can create royalty reports for artists, songwriters and their managers.

The company explains: "As part of the ingestion process, the values from each format will be mapped to it's corresponding field in the database and the data will be normalised – mapping values from one value to a client defined list of values".

So, for example, "this means once the data is in the system, 'ad-funded streams' are all mapped to the same value, making royalty reporting and analysis much easier. Royalties are then reported from this data, through the contract terms, which are fully flexible to fit any of the values in the data, calculating the royalty due to artists, and generating royalty statements".

Revelator™

Another company creating tools to help labels better manage royalty and financial data – as well as other streaming, usage and copyright data and assets – is **Revelator**. In its pitch to labels and distributors, it says that: "Revelator provides a single data platform for distribution, copyright management, business intelligence, financial reporting, royalty and payment distribution needs".

The Revelator platform can be used in various different ways, allowing clients to store assets and rights information, to pull in usage and financial data directly from digital music services, and to then crunch that data for the purposes of reporting, analytics and insights. When those are all combined, the company says, it offers "an end-to-end solution" that "addresses the challenges of aggregating, processing, reporting and analysing large volumes of data, and solves the problems of transparency in royalty distributions to copyright owners and creators across IP verticals".

When it comes to fan data tools, its important to note that for many independent artists and labels the tools provided by the streaming services themselves – via things like Spotify For Artists, Apple Music For Artists, Amazon Music For Artists and so on – have an important role to play. However, getting maximum value from fan data requires putting together data from many sources – so all the digital music platforms, but also social media and elsewhere – and assessing the impact of campaigns while also identifying patterns and monitoring trends.

Ei

This is where companies that providing integrated fan data tools come into play, including the likes of **Chartmetric**, **Soundcharts** and **Entertainment Intelligence**. These companies pull in data from multiple sources and platforms, and then provide various tools to organise and understand that data. They can also be used to access information about wider trends across the music market.

In its official pitch to labels, Entertainment Intelligence explains what it is doing to the data it pulls in, and how that helps labels make better use of said data. It says "we clean and refine

your data before ingesting, allowing you to rest easy knowing what you are being shown is a true representation of your catalogue's performance".

It also stresses how fan data becomes more valuable once different categories of data are combined. For example, it says, it can pull data from multiple social and user-upload platforms, and "when this information is overlaid with sales and geographic data you can for the first time gain previously unobtainable insights, informing every level of your campaign".

An interesting start-up seeking to facilitate the connection of artists and online influencers is **Zebr**, which has developed an app that aims to make it easier for artists and labels to identify and then connect with and formally engage influencers on platforms like TikTok, Instagram and Twitch.



Tools like this are arguably making influencer marketing campaigns more realistic and achievable for artists and labels operating on smaller budgets, while also providing opportunities for a much wider network of influencers.

In terms of what it does with data, one interesting element of Zebr is how it pulls data from the social media platforms in order to assess and rank each influencer. This process seeks to measure to what extent audiences are engaging with an influencer, so to more accurately assess the value that influencer can offer to artists and labels that engage their services.

OWN
YOUR
FUTURE

We Proudly Support
IMPALA's One Step Ahead

MERLIN

Find out more at merlinnetwork.org



ABOUT ONE STEP AHEAD

One Step Ahead is a digital intelligence facility from IMPALA to enable independent music companies across Europe to navigate and identify trends, developments, challenges and opportunities in the digital music market. Delivered in partnership with music business consultancy CMU Insights and with support from Merlin, One Step Ahead provides reports, tools and training to help independent music businesses of all sizes to get the most out of today's digital opportunities in Europe.



ABOUT IMPALA

IMPALA was established in 2000 and now represents over 5000 independent music companies. 99% of Europe's music companies are small, micro and medium businesses and self-releasing artists. Known as the independents, they are world leaders in terms of innovation and discovering new music and artists – they produce more than 80% of all new releases and account for 80% of the sector's jobs. IMPALA's mission is to grow the independent music sector sustainably, return more value to artists, promote diversity and entrepreneurship, improve political access, inspire change, and increase access to finance. Read more about IMPALA's story in 20 milestones on our website. impalamusic.org



ABOUT CMU INSIGHTS

CMU helps people navigate and understand the music business through media, education, research and events. CMU Insights is the company's business intelligence unit. It supports the music industry – both music companies and companies working with music – through training, consulting, research reports and conference sessions. cmuinsights.com



ABOUT MERLIN

Merlin provides independents the means to own their future. Members work directly with key digital partners, but benefit from Merlin's premium deals with over thirty digital music services around the world. Merlin's membership consists of independent labels, distributors, and other rights-holders, representing tens of thousands of labels and hundreds of thousands of artists from every country in the world, representing 15% of the global market share. As a member-led, artist-focused organisation, Merlin's mission is to deliver best in class services and work collaboratively with its digital partners to drive incremental benefits to members, while delivering value back to digital music services. merlinnetwork.org



impalamusic.org