2024 MUSIC IMPACT REPORT

COMMISSIONED BY TIKTOK IN PARTNERSHIP WITH LUMINATE





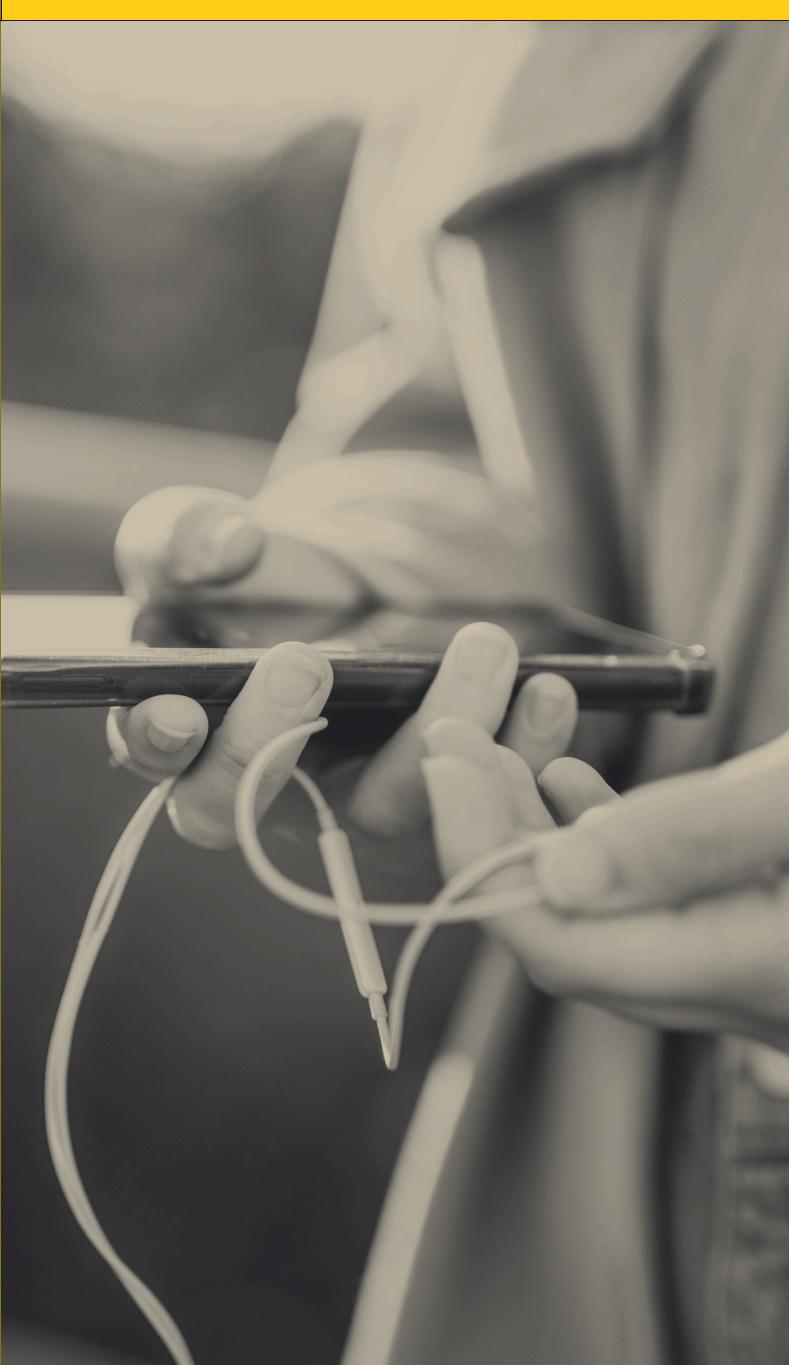




TABLE OF CONTENTS

01 TikTok Drives Music Discovery

02 TikTok Generates Value Off-Platform

03 TikTok Attracts High-Spending Music Super Fans



04 TikTok Positively Impacts Music Streams

05 TikTok Impacts Chart Success

06 **Methodology**



INTRODUCTION

TIKTOK IS A KEY DRIVER OF MUSIC DISCOVERY, **MONETIZATION AND CHART SUCCESS.**

This year's Music Impact Report demonstrates that TikTok continues to play a crucial role in the global music ecosystem. The latest analysis shows that TikTok engagement has a positive impact on an artist's music streaming activity, TikTok virality leads to global chart success and music super fans in the U.S. are highly likely to be users of TikTok.

In order to conduct this analysis, Luminate leveraged a combination of data sources (noted on the right). This report references global on-demand music streaming volumes, global *Billboard* chart placement and country-level data for the U.S. in order to identify distinctive consumer behaviors that make TikTok users uniquely valuable to the music industry.

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Consumption Data

Luminate Connect

Chart Data

Billboard Global 200

Audience Insights

Luminate Music 360 and Artist & Genre **Tracker Studies in the U.S.**

TikTok Engagement

Provided by TikTok

TikTok Virality

Provided by TikTok



KEY FINDINGS

84%

84% of songs that entered the *Billboard* Global 200 in 2024 went viral on TikTok first

74%

U.S. TikTok users are 74% more likely to discover and share new music on social and short-form video (SFV) platforms that the average user of these platforms

+11%

Artists whose TikTok engagement is highly related to their music streaming volumes experience an average of 11% weekly streaming growth compared to just 3% growth among artists whose streaming is less-related to TikTok activity

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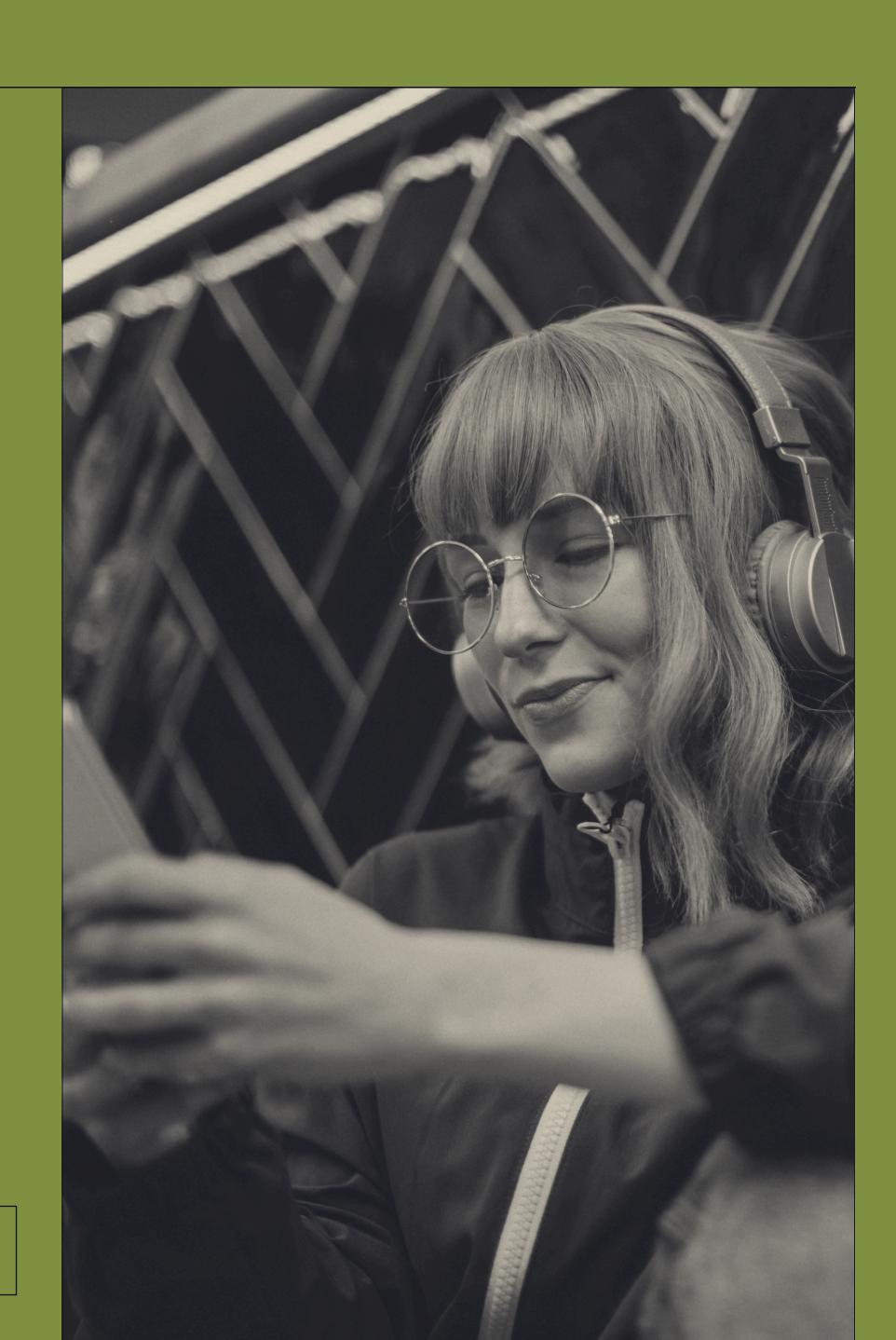
	68%	U.S. music listeners who use TikTok are 68% more likely to use a paid-for music streaming service than the U.S. general population
an	48%	U.S. TikTok users spend 48% more time streaming music audio than the average U.S. music listener
	62%	TikTok users in the U.S. spent 62% more money on artist merchandise than the average U.S. music listener
ty	2X	U.S. TikTok users are nearly twice as likely to be music super fans than the U.S. general population



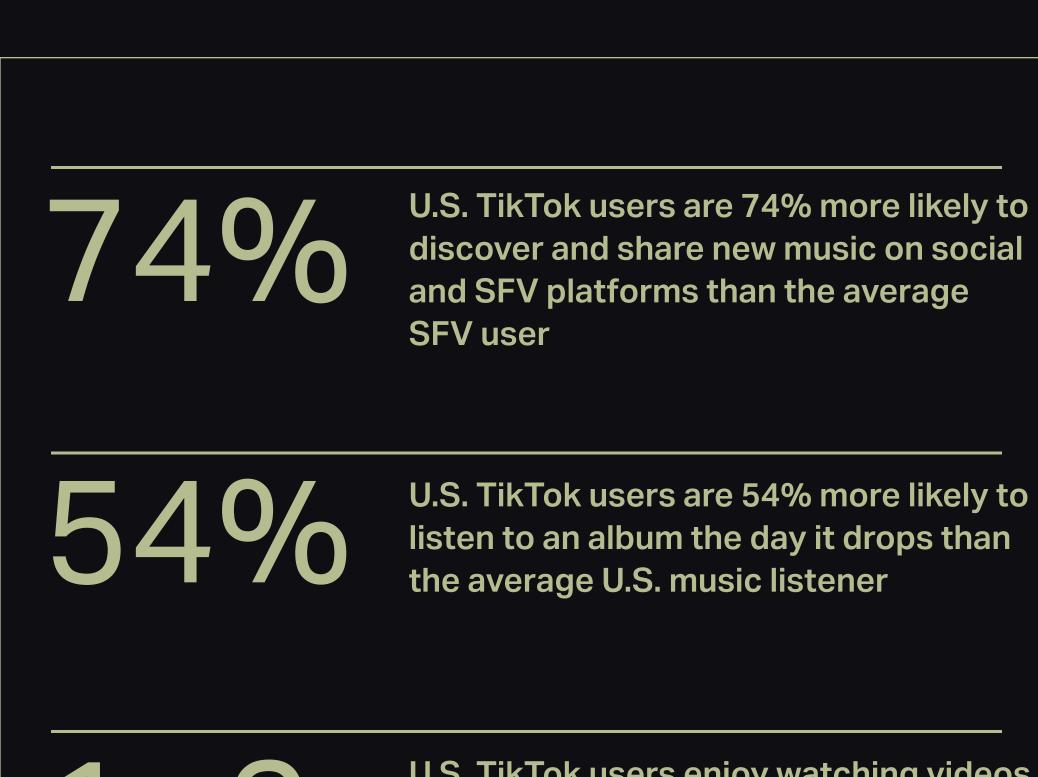
TikTok Drives Music Discovery

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SECTION 1



1 in 2

U.S. TikTok users enjoy watching videos about music artists, such as interviews and behind-the-scenes content

COMMISSIONED BY TIKTOK IN PARTNERSHIP WITH LUMINATE SOURCE: U.S. MUSIC 360, BP1: WHICH OF THE FOLLOWING SOURCES, IF ANY, DO YOU USE TO DISCOVER NEW MUSIC AND ARTISTS? - AMONG U.S. MUSIC LISTENERS AND U.S. MUSIC LISTENERS WHO USE TIKTOK. U.S. MUSIC 360, SM2: WHICH OF THE FOLLOWING MUSIC-RELATED ACTIVITIES, IF ANY, DO YOU DO ON SOCIAL MEDIA OR SHORT FORM VIDEO SITES/APPS? AMONG U.S. SM/SFV USERS AND TIKTOK USERS ARTIST & GENRE TRACKER, ALB1: WHEN AN ARTIST YOU LIKE RELEASES A NEW ALBUM, WHEN ARE YOU MOST LIKELY TO LISTEN TO IT? - AMONG U.S. MUSIC LISTENERS AND U.S. MUSIC LISTENERS WHO USE TIKTOK

U.S. TIKTOK USERS ARE MORE LIKELY TO DISCOVER AND SHARE MUSIC ON SFV SITES THAN USERS OF COMPARABLE PLATFORMS

TikTok users not only discover music on the platform but also share the music they discover with others. In fact, TikTok users are 74% more likely to discover and share new music on social and SFV platforms compared with the average SFV user in the U.S.

U.S. TikTok users are among the first audiences to listen to a new album upon release. Four in 10 U.S. TikTok users listen to a new album on release week - a rate that is 27% higher than that of the average U.S. music listener. In fact, U.S. TikTok users are 54% more likely to listen to an album the day it drops.

User appetite for music discovery also goes beyond music itself. 50% of U.S. TikTok users say they enjoy watching videos about music artists, such as interviews and behind-the-scenes content. That's 47% higher than the average U.S. social and SFV user.





CHAPPELL ROAN

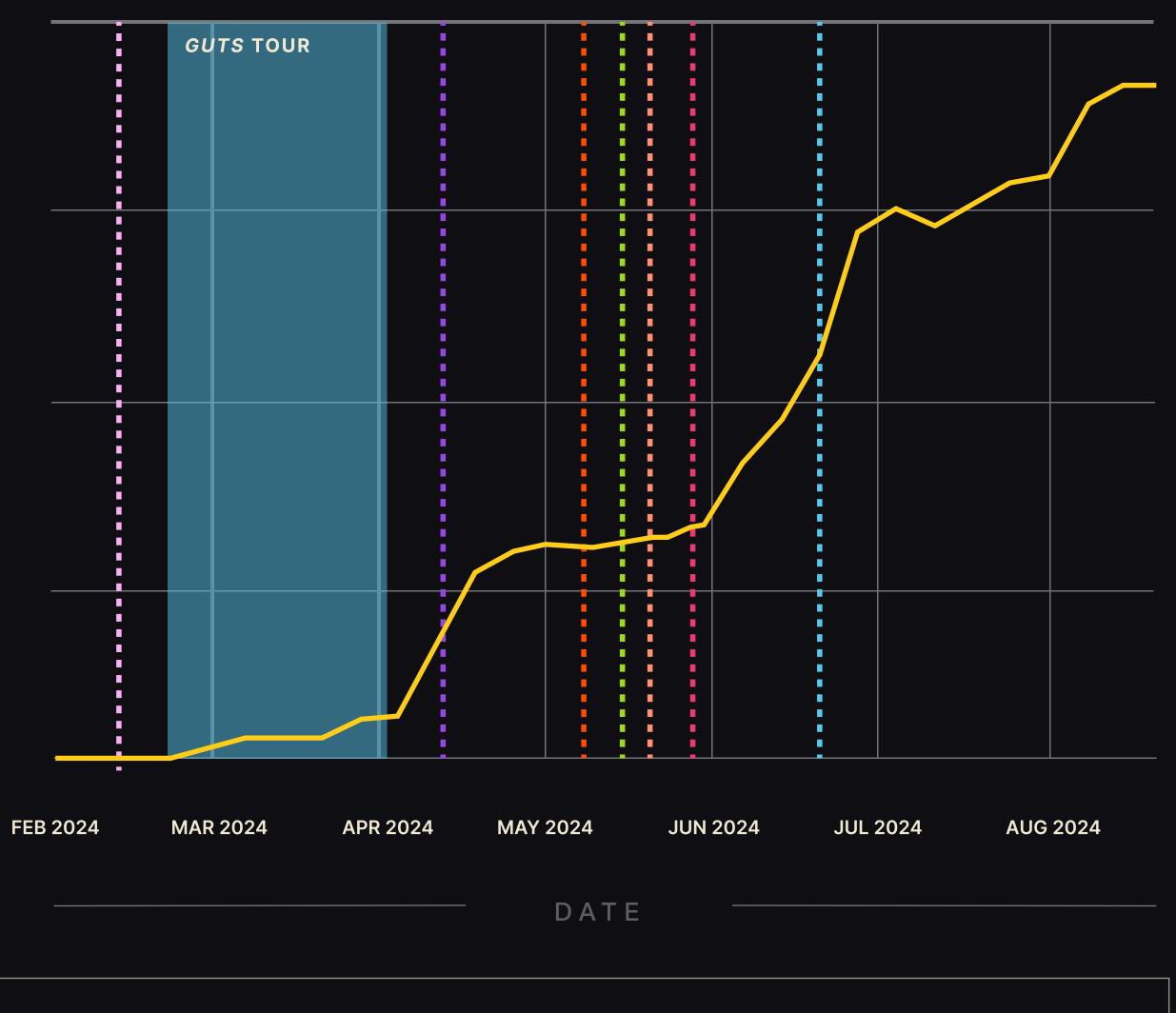
FROM NEW ARTIST TO MUSIC "FEMININOMENON"

Chappell Roan had a meteoric rise to worldwide stardom in 2024 despite having released her debut album The Rise and Fall of a Midwest Princess in 2023. Her breakthrough started in February 2024 when her song "Casual" went viral on TikTok. The now-iconic dance for her song "HOT TO GO!" then took off on the app, and other songs like "Pink Pony Club," "Red Wine Supernova" and "Good Luck, Babe!" soon appeared in millions of TikTok videos. In February 2024 Roan was the 68th moststreamed female pop artist in the U.S.; by September, she was third. Along with opening for Olivia Rodrigo on the Guts tour, performing at Coachella and appearing on shows like The Tonight Show Starring Jimmy Fallon and SNL, Chappell Roan's TikTok virality was a major driver behind her unprecedented success.



CHAPPELL ROAN WEEKLY TIKTOK VIRALITY AND ON-DEMAND STREAMS

On-Demand Streams	
IIIIII "Casual" goes TikTok-viral	
Performance at Coachella	
"Good Luck Babe!" goes TikTok-viral	
"INT TO GO!" goes TikTok-viral	
"ITT "Red Wine Supernova" goes TikTok-viral	
"IPINK Pony Club" goes TikTok-viral	
Appearance on Jimmy Fallon	





TikTok Generates Value Off-Platform

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SECTION 2



68%

U.S music listeners who use TikTok are 68% more likely to use a paid-for music streaming subscription than the U.S. general population

48%

U.S. TikTok users spend 48% more time streaming music audio than the average U.S. music listener

1B

1 billion song saves generated by TikTok's "Add to Music App" since full launch in 2024

COMMISSIONED BY TIKTOK IN PARTNERSHIP WITH LUMINATE SOURCE: TIME SPENT STREAMING MUSIC AUDIO CALCULATION: U.S. MUSIC 360, TM1. IN A TYPICAL WEEK, HOW MANY HOURS DO YOU SPEND LISTENING TO MUSIC? / TM3. IN A TYPICAL MONTH, WHAT PERCENTAGE OF YOUR TIME SPENT LISTENING TO MUSIC DO YOU LISTEN IN EACH OF THE FOLLOWING FORMATS? - AMONG U.S. MUSIC LISTENERS AND U.S. MUSIC LISTENERS WHO USE TIKTOK U.S. MUSIC 360, MS2: DO YOU CURRENTLY USE ANY OF THE FOLLOWING ONLINE MUSIC STREAMING SERVICES? AMONG U.S. MUSIC LISTENERS AND U.S. MUSIC LISTENERS WHO USE TIKTOK

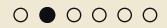
TIKTOK USERS IN THE U.S. ARE MORE LIKELY TO USE PAID-FOR STREAMING SERVICES

U.S. music listeners who use TikTok are 68% more likely to use a paid-for music streaming service than the U.S. general population. In fact, almost two-thirds of music listeners on TikTok are paying users of at least one music streaming service.

TikTok users are also highly engaged: U.S. TikTok users spend 48% more time streaming music audio than the average U.S. music listener.

TikTok's impact on off-platform music streaming is now directly evident thanks to the <u>"Add to Music App"</u> music discovery feature. The feature, which allows music fans to directly save songs discovered on TikTok to their preferred music streaming service, has generated over one billion song saves since its full launch in 2024.







SABRINA CARPENTER A TIKTOK VIRAL DEBUT

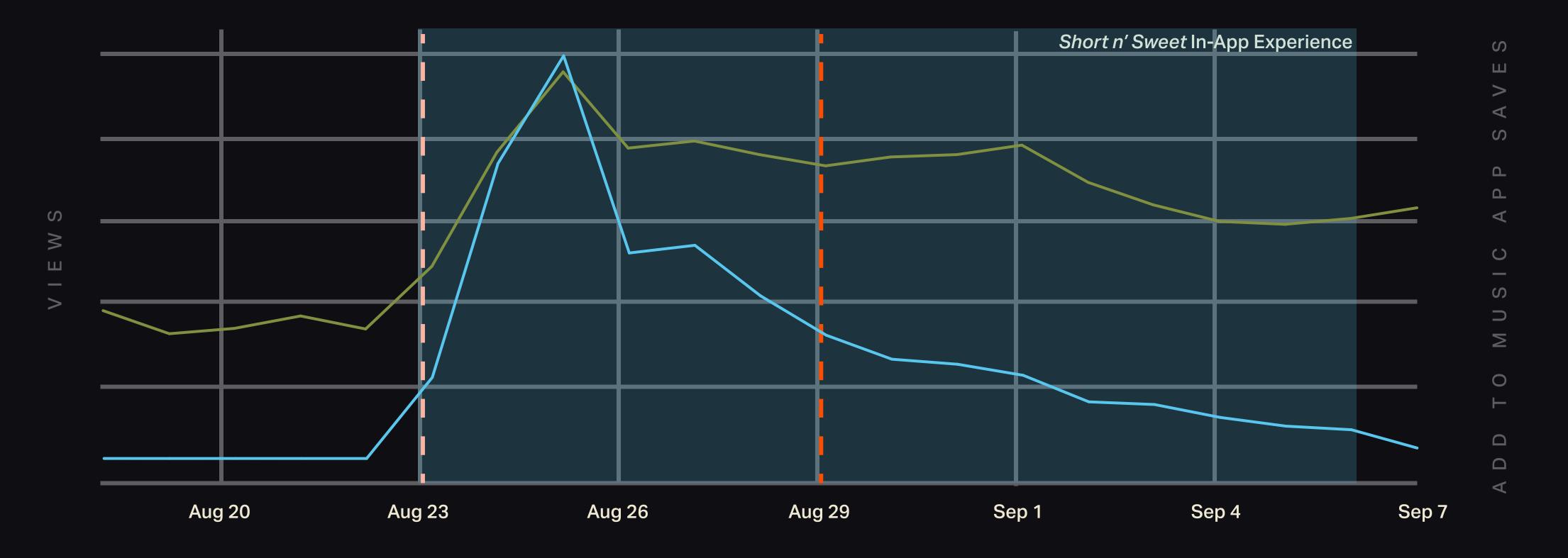
With her album *Short n' Sweet*, Sabrina Carpenter dominated 2024 thanks to perfectly crafted pop songs with irresistible hooks. Her singles "Espresso" and "Please, Please, Please" both went viral on TikTok, so when the full album was finally released in August - supported by a major TikTok partnership campaign and *Short n' Sweet* in-app experience - TikTok views and Add to Music App saves for Carpenter's new songs rapidly spiked and remained high well into the fall. Collectively, "Espresso," "Please, Please, Please" and "Taste" generated over 16 million TikTok video creations. The album debuted at No.1 on the *Billboard* 200 the same week it went viral on TikTok, and by the end of the year, Sabrina Carpenter was announced as <u>TikTok's No. 1 artist in the U.S. in 2024</u>, as ranked by TikTok views.



SABRINA CARPENTER

DAILY TIKTOK VIEWS AND ADD TO MUSIC APP SAVES

Add to Music App Saves 📰 Views E Short n' Sweet released E Short n' Sweet debuts No.1 on Billboard 200



COMMISSIONED BY TIKTOK IN PARTNERSHIP WITH LUMINATE SOURCE: LUMINATE CONNECT AND TIKTOK DATA





U.S. TIKTOK USERS SPEND MORE MONEY THAN THE AVERAGE U.S. MUSIC LISTENER

46% more on *music*

52% MORE ON LIVE MUSIC EVENTS

62% MORE ON ARTIST MERCHANDISE

COMMISSIONED BY TIKTOK IN PARTNERSHIP WITH LUMINATE SOURCE: U.S. MUSIC 360, TM4. HOW MUCH MONEY, IF ANY, DID YOU SPEND ON THE FOLLOWING ACTIVITIES IN A TYPICAL MONTH? - AMONG U.S. MUSIC LISTENERS AND U.S. MUSIC LISTENERS WHO USE TIKTOK U.S. MUSIC 360, BP3. WHICH OF THE FOLLOWING FORMS OF MUSIC, IF ANY, HAVE YOU PURCHASED IN THE PAST 12 MONTHS? - AMONG U.S. MUSIC LISTENERS AND U.S. MUSIC LISTENERS WHO USE TIKTOK U.S. MUSIC 360, BP4. WHAT IS IMPORTANT TO YOU WHEN DECIDING WHAT FORM OF MUSIC TO PURCHASE? - AMONG U.S. MUSIC LISTENERS WHO MAKE MUSIC PURCHASES AND U.S. TIKTOK USERS WHO MAKE MUSIC PURCHASE?

TIKTOK USERS IN THE U.S. SPEND MORE MONEY ON MUSIC COMPARED TO OTHER MUSIC LISTENERS

U.S. TikTok users spend 46% more money on music each month than the average U.S. music listener. In addition to paying for music streaming subscriptions, almost one-third of U.S. TikTok users have purchased music in physical formats such as CDs or vinyl in the past year. U.S. TikTok users spend 10% more money on physical music compared to the average U.S. music listener.

Fandom is a motivation for this spend: U.S. TikTok users are 40% more likely to make music purchases with the specific goal of boosting an artist's chart position compared to the average consumer who makes music purchases.

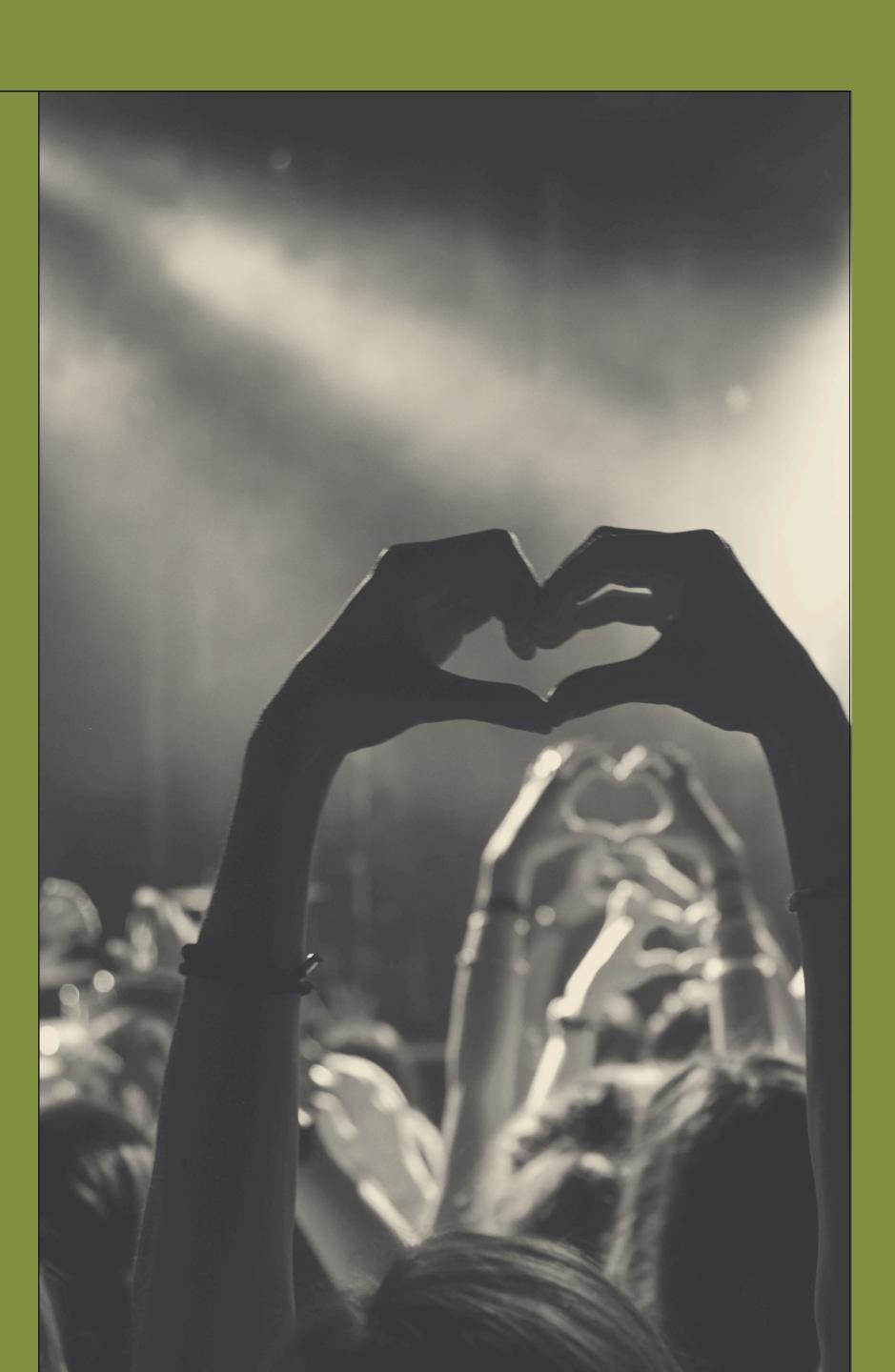
Along with streaming songs and buying albums, music fans on TikTok are highly engaged with live music. TikTok users in the U.S. outspent the average U.S. music listener on live music events by 52% this year. U.S. TikTok users also spend 62% more on artist merchandise than the average U.S. music listener.



TikTok Attracts High-Spending Music Super Fans

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SECTION 3



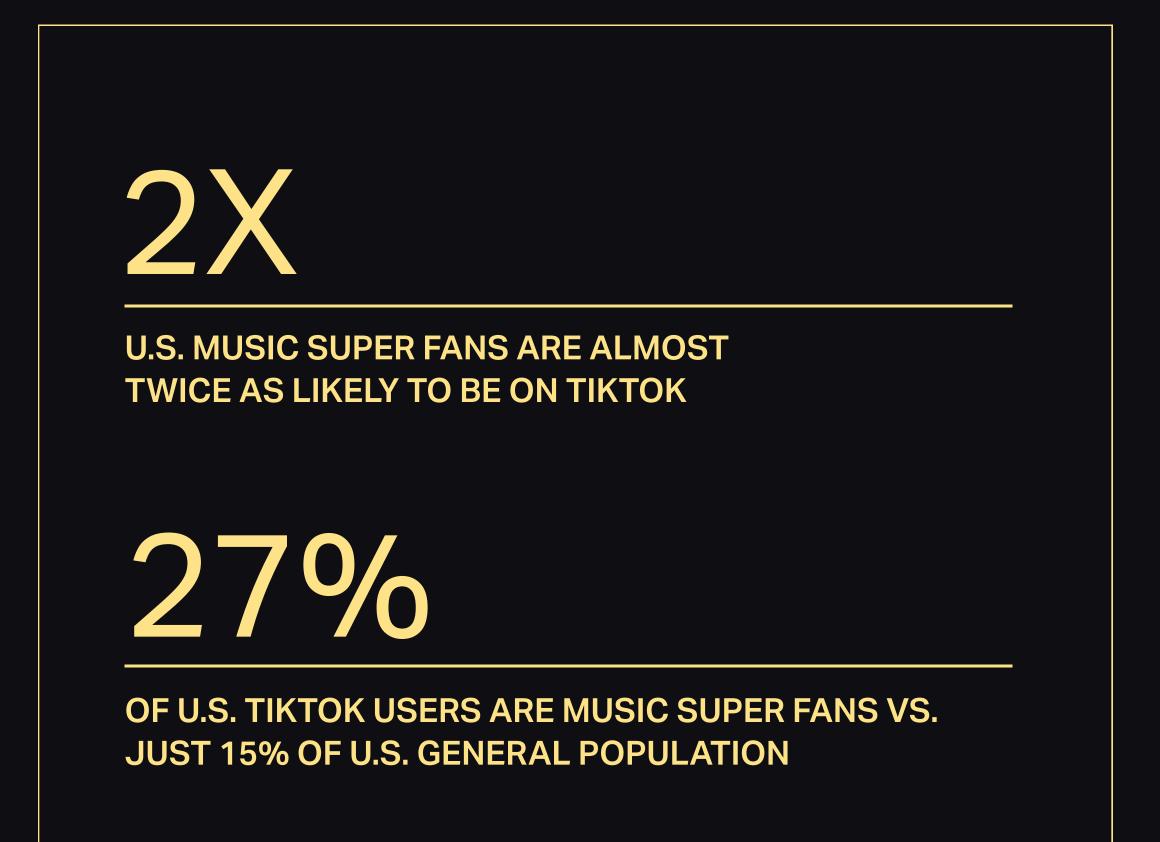
U.S. MUSIC SUPER FANS ARE ON TIKTOK

Music super fans¹ are the most passionate and engaged members of an artist's fanbase, making them a highly sought-after audience with high spending power.

Compared to average U.S. music listeners, music super fans spend more time and money each month on a wide range of music categories, including live music, physical, artist merchandise and paid-for music streaming services.

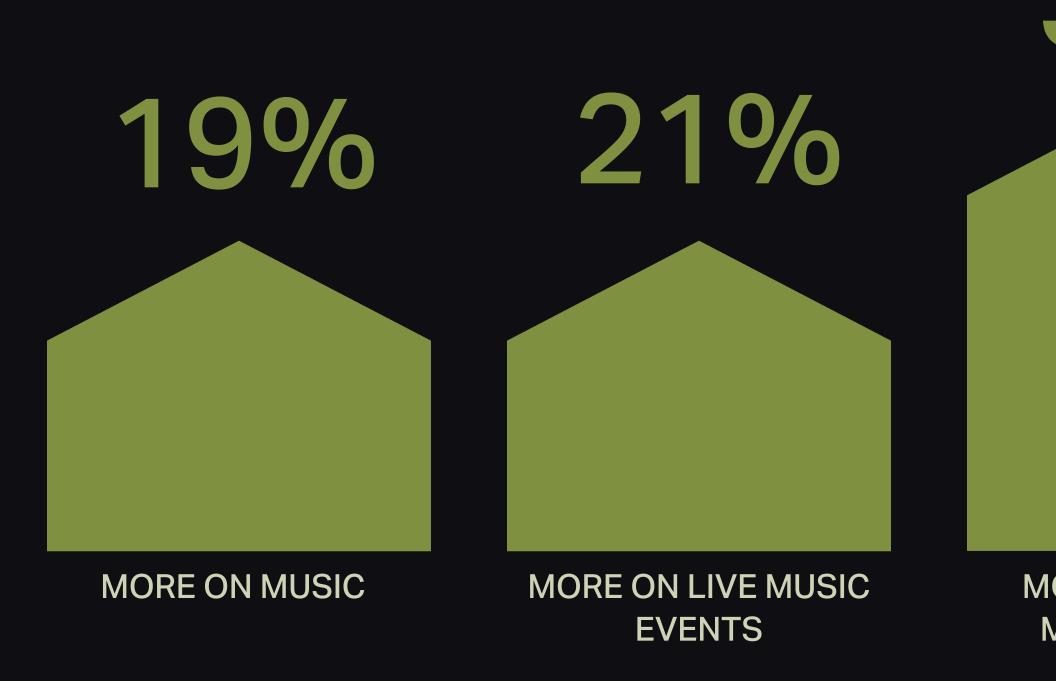
U.S. TikTok users are nearly twice as likely to be music super fans: 27% of all U.S. TikTok users are music super fans versus just 15% within the U.S. general population.

COMMISSIONED BY TIKTOK IN PARTNERSHIP WITH LUMINATE SOURCE: U.S. MUSIC 360, SUPER FANS_Q3. IN WHICH OF THE FOLLOWING WAYS, IF ANY, WOULD YOU BE WILLING TO ENGAGE WITH A MUSIC ARTIST AND THEIR CONTENT? - AMONG U.S. MUSIC LISTENERS AND U.S. MUSIC LISTENERS WHO USE TIKTOK. ¹ MUSIC SUPER FANS ARE THOSE WHO ENGAGE WITH MUSIC ARTISTS IN AT LEAST FIVE OR MORE UNIQUE WAYS





U.S. MUSIC SUPER FANS ON TIKTOK SPEND MORE MONEY THAN THE AVERAGE U.S. MUSIC SUPER FAN



READ AS: U.S. MUSIC SUPER FANS ON TIKTOK SPEND 19% MORE MONEY ON MUSIC THAN THE AVERAGE U.S. MUSIC SUPER FAN.

COMMISSIONED BY TIKTOK IN PARTNERSHIP WITH LUMINATE SOURCE: U.S. MUSIC 360, TM4. HOW MUCH MONEY, IF ANY, DID YOU SPEND ON THE FOLLOWING ACTIVITIES IN A TYPICAL MONTH? THINK ABOUT THE TOTAL COST FOR THE ACTIVITY, INCLUDING ANY MONTHLY SUBSCRIPTION COSTS. - AMONG U.S. TIKTOK MUSIC SUPER FANS AND AVERAGE U.S. MUSIC SUPER FANS. ¹ MUSIC SUPER FANS ARE THOSE WHO ENGAGE WITH MUSIC ARTISTS IN AT LEAST FIVE OR MORE UNIQUE WAYS

34%

MORE ON ARTIST MERCHANDISE

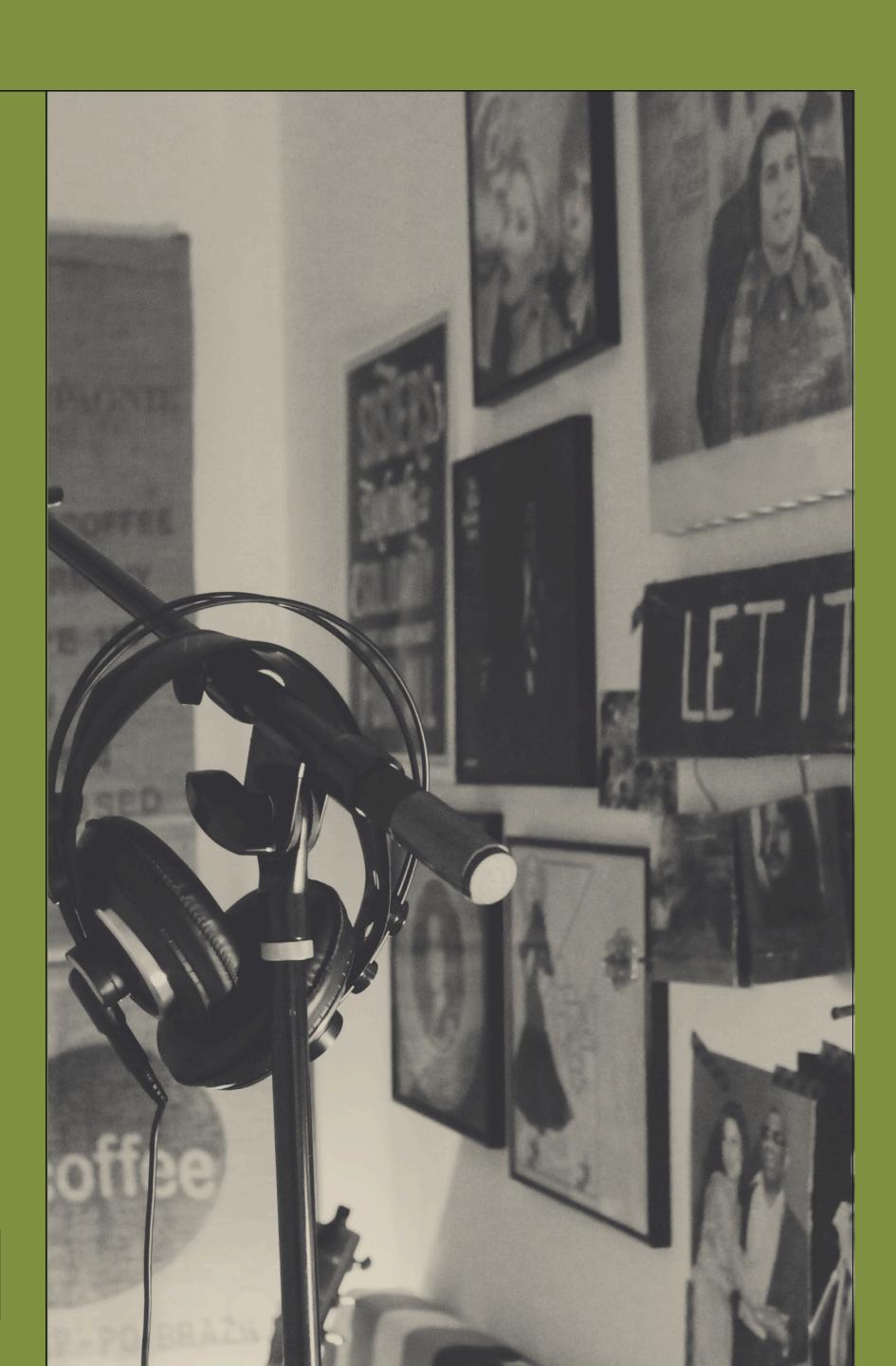
U.S. MUSIC SUPER FANS ON TIKTOK ARE ONE OF THE BIGGEST-SPENDING AUDIENCES IN MUSIC

U.S. music super fans¹ on TikTok spend more money on music than even the average U.S. music super fan. Specifically, U.S. music super fans on TikTok spend significantly more money monthly across categories such as streaming, live music events, merchandise and others.



TikTok Positively Impacts Nusic Streams

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SECTION 4

110_{0}

An artist can expect an average of 11% increase in on-demand music streaming over the course of the three days following a peak in TikTok total views

96%

TikTok total views are significantly related to streaming volumes for 96% of artists in this analysis

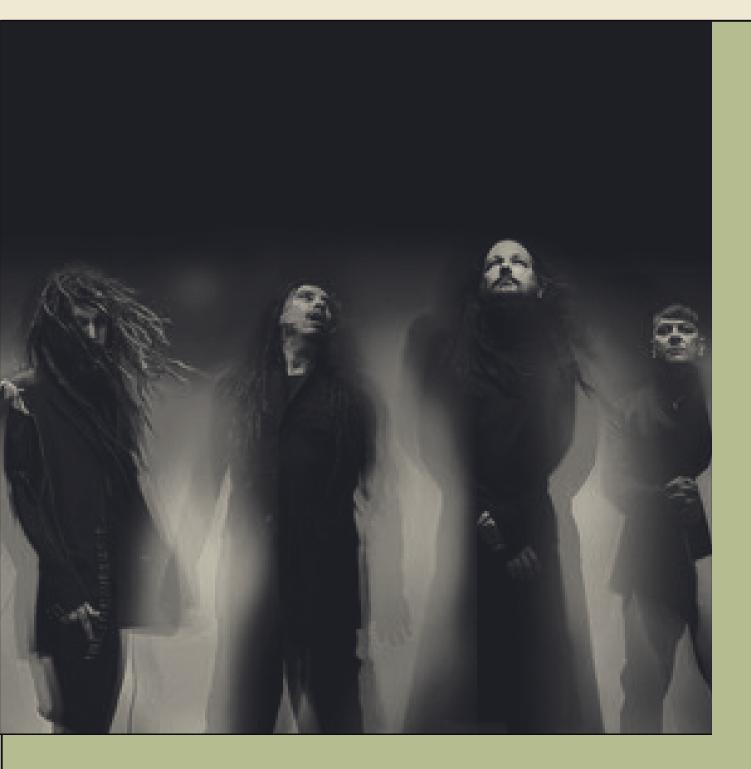
COMMISSIONED BY TIKTOK IN PARTNERSHIP WITH LUMINATE SOURCE: SOURCE: LUMINATE CONNECT AND TIKTOK DATA ¹ CROSS-VALIDATED OLS MODEL. TIKTOK METRICS CITED ABOVE HAD A SIGNIFICANT ASSOCIATION WITH MUSIC STREAMING FOR AT LEAST 50% OF ARTISTS IN THE SAMPLE.

ARTISTS EXPERIENCE SIGNIFICANT STREAMING GROWTH AFTER A PEAK IN ΤΙΚΤΟΚ ΑCTIVITY

Analysis of TikTok activity and global on-demand music streaming reveals that for a majority of sampled artists, engagement on TikTok - including total views, For You Page views, creations and likes - is significantly related to on-demand streaming performance.¹ Assessing artists across a range of different genres, countries of origin and fanbase sizes, there is a statistically significant relationship between total TikTok views and streaming volumes for 96% of artists.

There is also a significant relationship between an artist's music or content peaking on TikTok and their streaming growth in the days following. Specifically, an artist can expect an average of 11% increase in on-demand music streams over the course of the three days following a peak in total TikTok views.²





KORN

NU METAL FOR NEW AUDIENCES

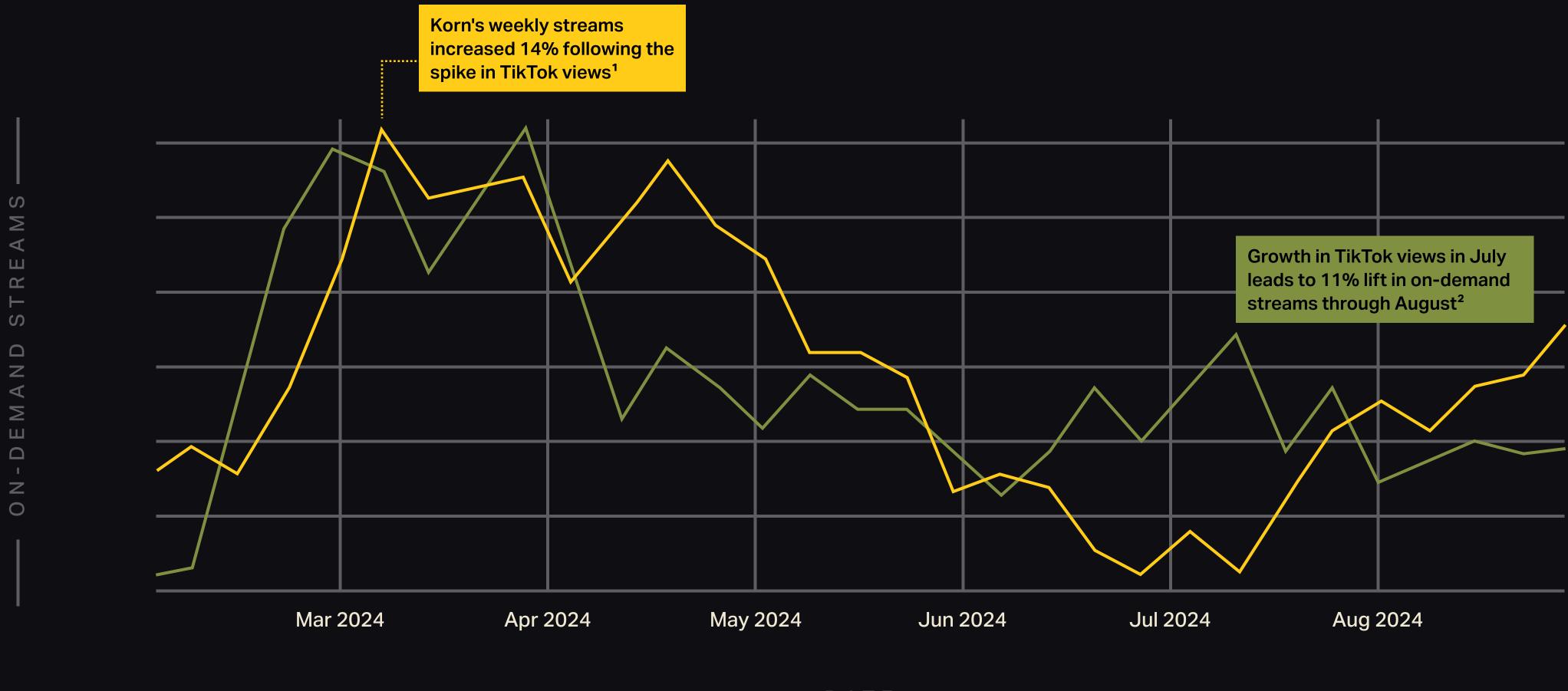
Korn, one of the most influential Nu Metal bands of the 1990s, has enjoyed steady streaming activity across their catalog for decades. This past year was different: even without releasing new music since 2022, a number of the band's catalog songs went viral on TikTok with trends like "Korn is Girlypop" and "Look it's Korn." An initial spike in TikTok views in February was followed by a 14% monthly increase in on-demand streams just a week later¹. A pattern soon emerged as the year went on — every time TikTok activity increased for Korn, a lift in streaming followed.

COMMISSIONED BY TIKTOK IN PARTNERSHIP WITH LUMINATE ¹COMPARING WEEK ENDING MARCH 7 TO WEEK ENDING FEB 15



KORN

Weekly TikTok Views and On-Demand Streams TikTok Views On-Demand Streams



COMMISSIONED BY TIKTOK IN PARTNERSHIP WITH LUMINATE SOURCE: LUMINATE CONNECT AND TIKTOK DATA ¹COMPARES THE STREAMS FROM THE WEEK ENDING FEB 15 TO THE WEEK ENDING MAR 7 ²COMPARES THE STREAMS FROM THE WEEK ENDING JUL 11 TO THE WEEK ENDING AUG 29

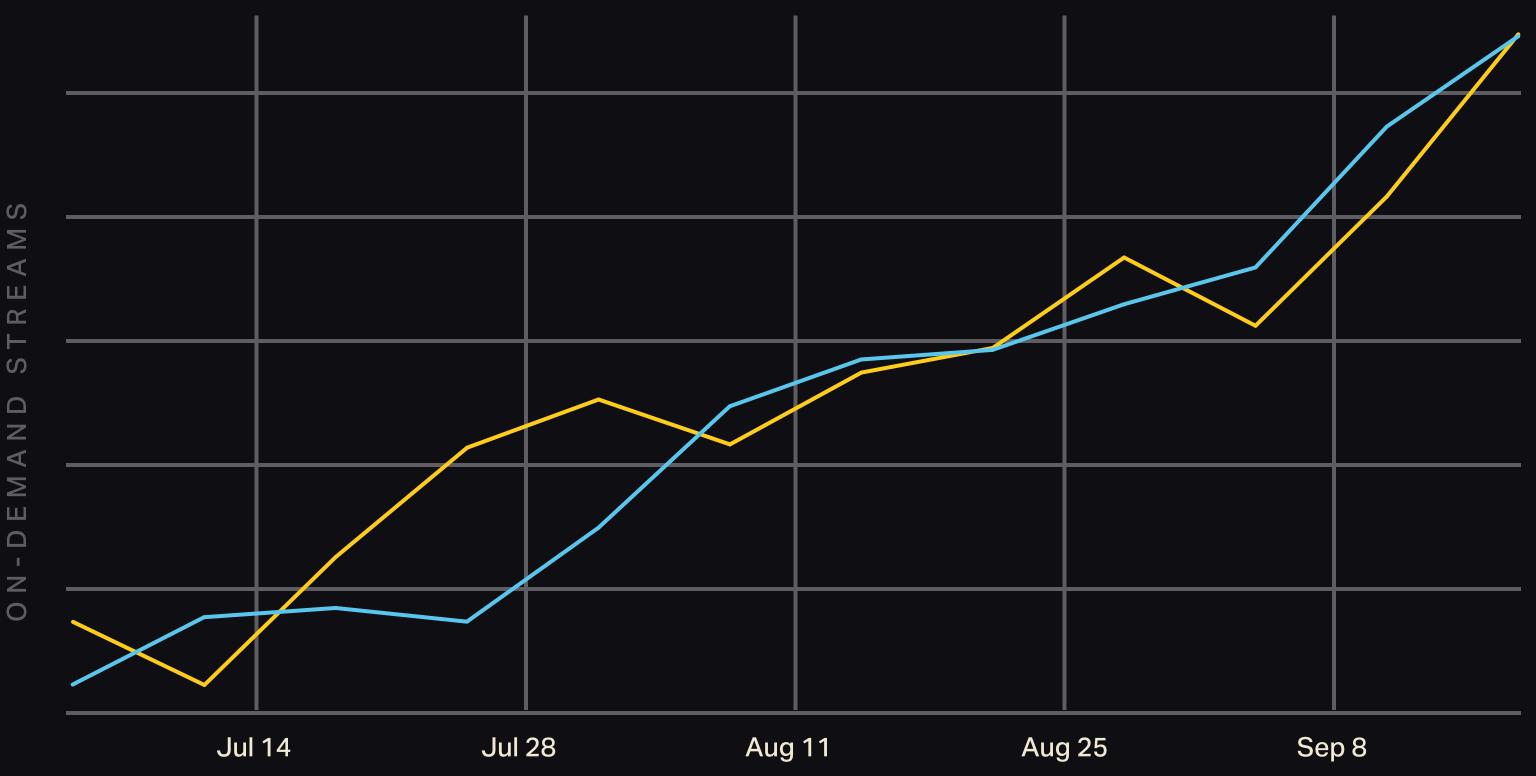
DATE



KORN

Weekly Add to Music App Saves and On-Demand Streams

Korn also saw increased streams in close correlation with Add to Music App activity. From June to September 2024, as Add to Music App saves increased, Korn's ondemand streams rose 17%.





COMMISSIONED BY TIKTOK IN PARTNERSHIP WITH LUMINATE SOURCE: LUMINATE CONNECT AND TIKTOK DATA DATA CALLOUT ABOVE COMPARES THE STREAMS FROM THE WEEK ENDING JULY 11 TO THE WEEK ENDING SEP 19

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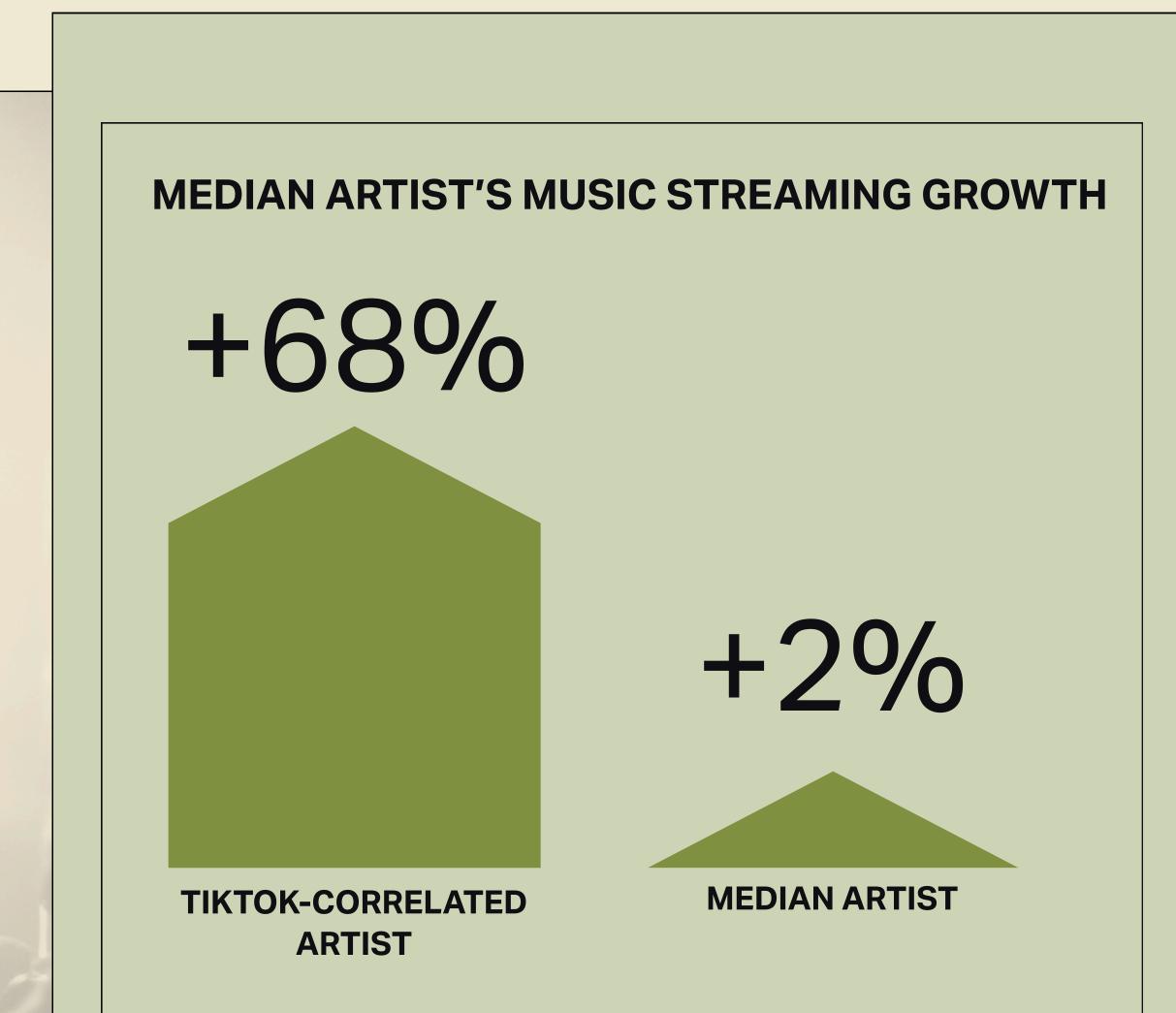
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COMMISSIONED BY TIKTOK IN PARTNERSHIP WITH LUMINATE SOURCE: LUMINATE CONNECT AND TIKTOK DATA ¹ "TIKTOK-CORRELATED ARTISTS" ARE ARTISTS WHOSE R2 EXCEEDS 0.7 USING A CROSS-VALIDATED OLS MODEL, W ANALYSIS DUE TO NOT HAVING A FULL YEARS' WORTH OF DATA TO USE IN OUR CALCULATIONS.

TIKTOK ENGAGEMENT INFLUENCES LONG-TERM STREAMING GROWTH

In general, the artists whose TikTok engagement is highly related to their music streaming volumes— referred to as "TikTok-Correlated Artists"¹ for brevity's sake — experience higher growth in their on-demand streaming over the year vs. artists whose TikTok engagement is less related to streaming volumes. On average, TikTok-Correlated Artists see an 11% week-over-week streaming growth rate compared to just 3% for the other artists. Notably, streaming growth among TikTok-Correlated Artists is true for both smaller and larger music artists.

Longer-term, this weekly growth translates into significant cumulative streaming gains for the TikTok-Correlated Artists. The median TikTok-Correlated Artist's streaming volume grows by a total of 62%, while on average the median artist's streaming volume grows by just 2% when comparing the first 12 weeks (1/26/24 - 4/18/24) to the last 12 weeks of the analysis (7/5/2024- 9/26/2024).



TikTok Impacts Chart Success

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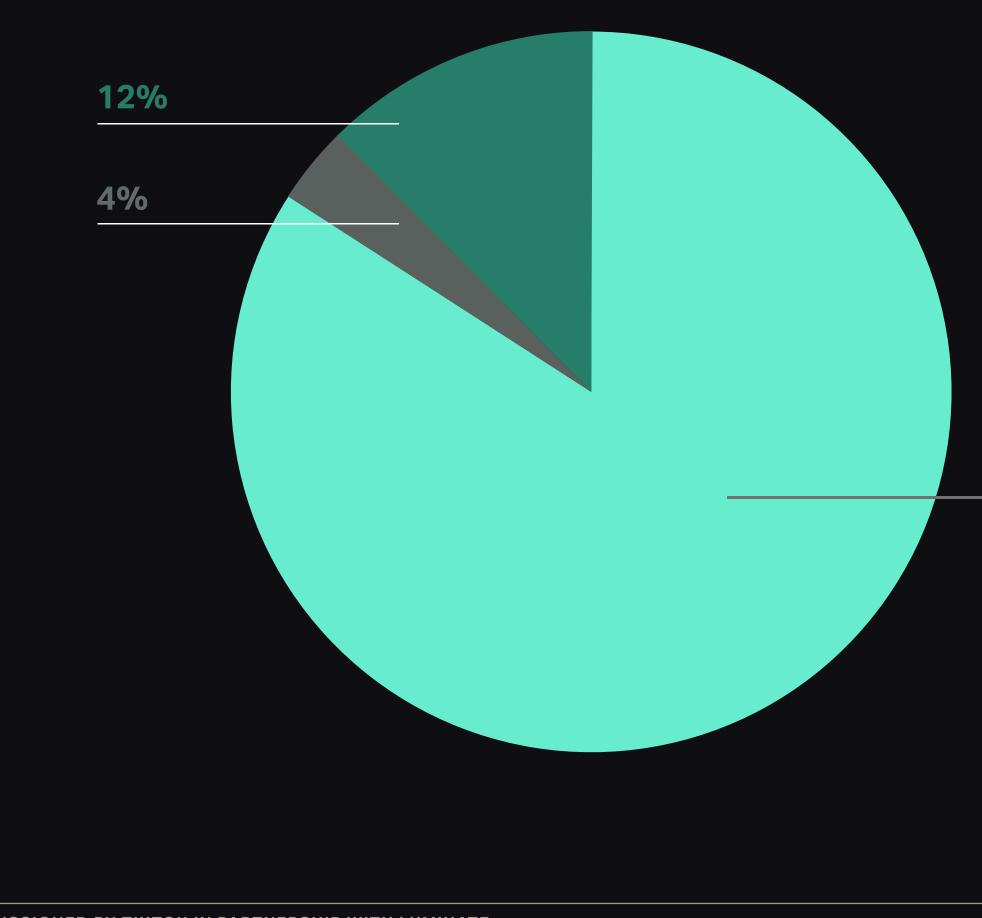






TIKTOK AND THE BILLBOARD GLOBAL 200

Viral Before Charting Viral After Charting Not Viral



COMMISSIONED BY TIKTOK IN PARTNERSHIP WITH LUMINATE SOURCE: LUMINATE CONNECT AND TIKTOK DATASOURCE: LUMINATE CONNECT AND TIKTOK DATA INCLUDES ALL SONGS THAT APPEARED ON THE BILLBOARD GLOBAL 200 BETWEEN WEEK 1 AND WEEK 39, 2024. EXCLUDES ANY SONGS THAT APPEARED ON THE BILLBOARD GLOBAL 200 IN 2023. HIGH ENGAGEMENT ON TIKTOK THRESHOLD DETERMINED BY TIKTOK

THE VAST MAJORITY OF SONGS ENTERING THE **BILLBOARD GLOBAL 200 CHART HAVE A TIKTOK VIRAL MOMENT FIRST**

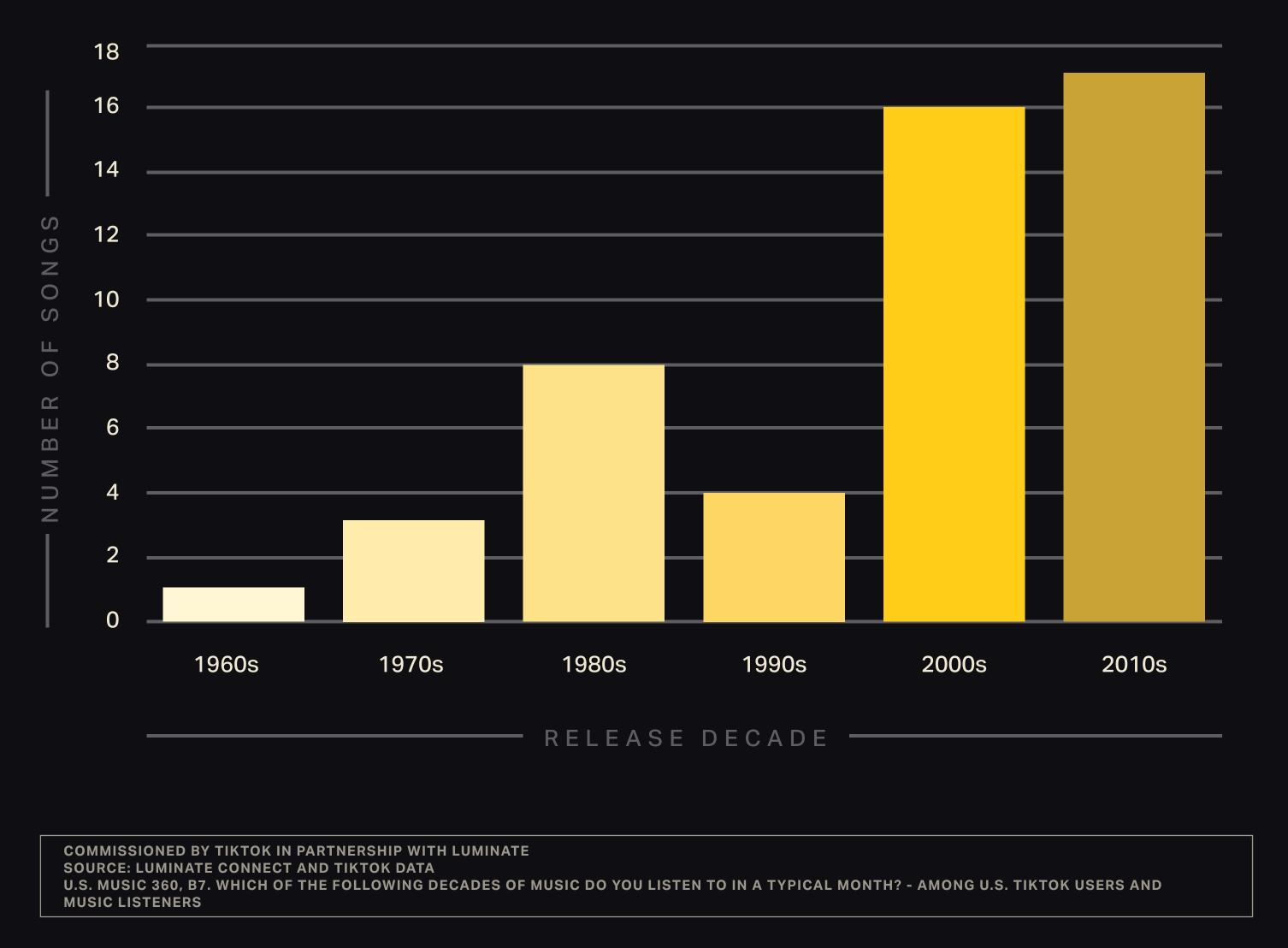
84% of all songs that entered the *Billboard* Global 200 this year "went viral" (i.e., had a period of high engagement) on TikTok beforehand. In addition, 12% went viral at the same time or after landing on the chart, while only 4% didn't have a viral moment.

84%



REDISCOVERING THE CLASSICS

Catalog songs that went viral on TikTok before appearing on the *Billboard* Global 200

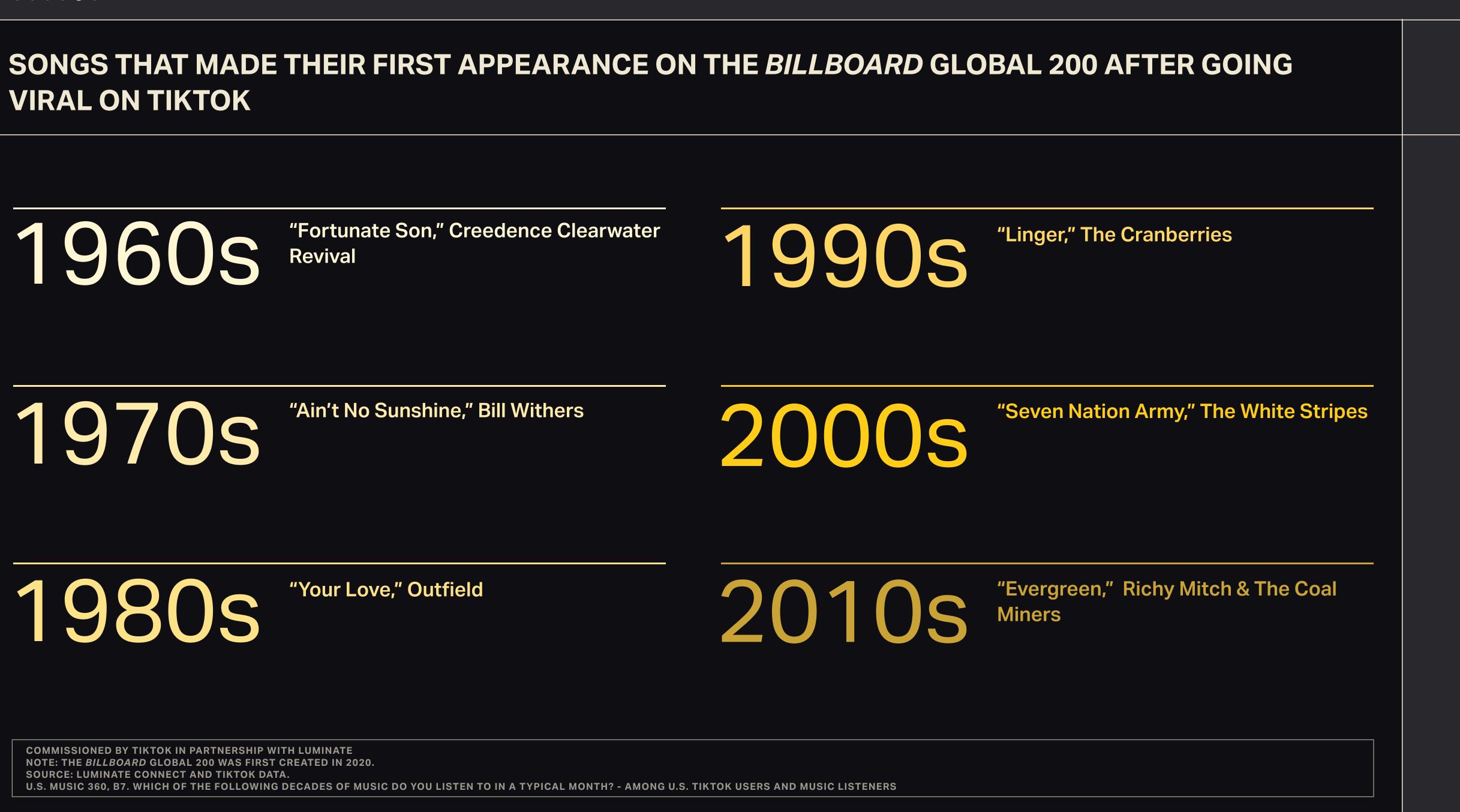


TIKTOK DRIVES RE-DISCOVERY OF CATALOG HITS

As well as being an important source of new music discovery, TikTok frequently drives rediscovery of catalog music across a wide array of genres. In 2024, over 50 different catalog songs entered the *Billboard* Global 200 after going viral on TikTok.

Considering that nine out of 10 TikTok users say they enjoy listening to music from past decades, catalog music seems just as likely as recently released music to find new audiences on TikTok.





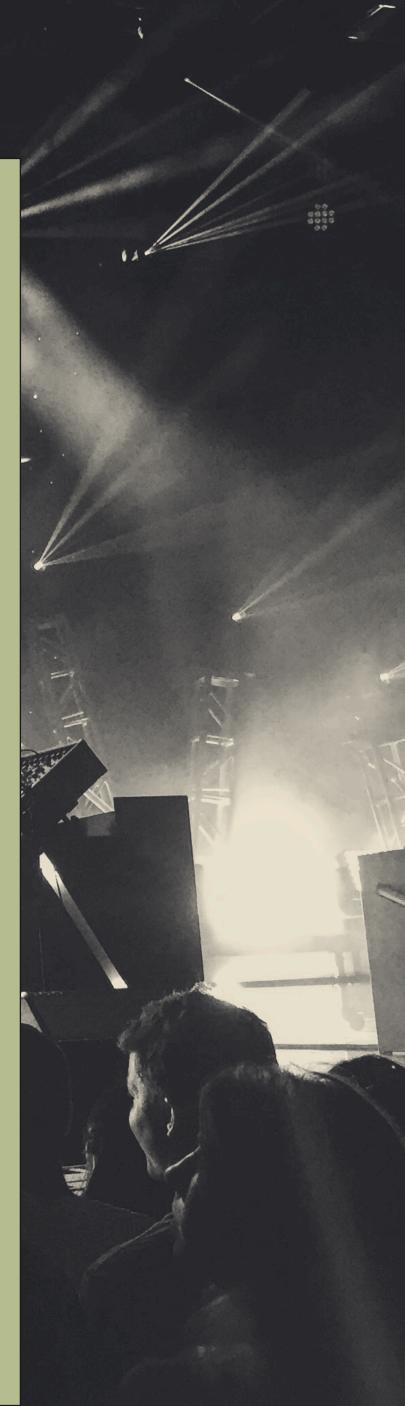


ALPHAVILLE

ALPHAVILLE: "FOREVER YOUNG" REACHES A NEW GENERATION

Four decades after its initial release in 1984, Alphaville's classic ballad "Forever Young" suddenly gained popularity on TikTok over the summer of 2024 as the nostalgic soundtrack to compilations of summer memories and throwbacks to younger, carefree years.

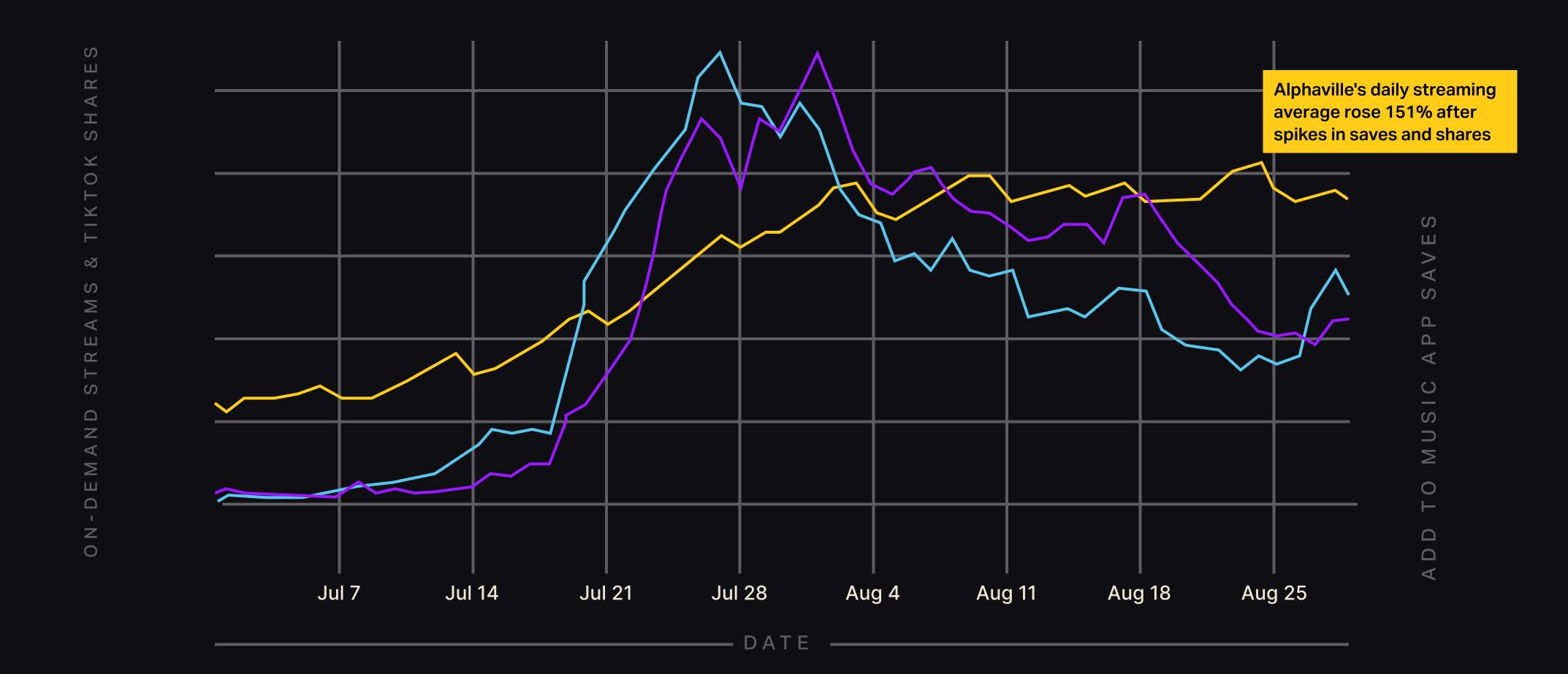
As a result, the song spiked in TikTok Add to Music App saves around mid-July, followed by a surge in TikTok shares and then, finally, "Forever Young" saw an increase of on-demand streams that continued to grow after the TikTok activity peaked. As a result of its TikTok popularity, "Forever Young" charted on the *Billboard* Global 200 chart for nine weeks over the summer, reaching a peak of No. 105.





ALPHAVILLE

Daily TikTok Activity and On-Demand Streams



COMMISSIONED BY TIKTOK IN PARTNERSHIP WITH LUMINATE SOURCE: LUMINATE CONNECT AND TIKTOK DATA NOTE: CALLOUT ON GRAPH IS COMPARING AVERAGE STREAMS FROM JUL 1 - JUL 18 TO AVERAGE STREAMS FROM AUG 1 - AUG 18





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Methodology

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SECTION 6

ARTIST SAMPLING AND REGRESSION ANALYSIS

- **Sample procedure:** Random sample of all artists in the market, given the following parameters:
 - Artists had over 5M global on-demand streams in Q3 2024, to ensure that artists in the middle and top tiers of the market could be represented, as well as artists who started the year with zero activity
 - Country of streams: Global, excluding India, North Korea, China, Cuba, Syria
 - Artists whose primary genre is not one of the following, as these are not a main focus for TikTok:
 - Film, Religious, Soundtrack, Spoken & Audio, Stage Musicals
 - Artists with some internet or social media presence, allowing for the ability to research information about each artist
 - band
 - Artists whose music was available on TikTok for the full duration of the sample period
 - Artists who do not have suspected fraudulent activity
- Sample size: 677 artists
- Luminate metrics: On-demand total streams (audio + video grouped together)
 - Country of streams: Global, excluding India, North Korea, China, Cuba, Syria
- TikTok metrics: Creations, Views, Shares, Likes, Comments, Finished Views, Views from For You Page, Add to Music App Saves
- Period: Jan 26 2024 Sep 26 2024 (Week 5 39)
- **Cadence:** Daily-level activity
- Applied Models: OLS, ARIMA, Cross-correlation

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• Bollywood, Children, Christian, Classical, Gospel, Jazz, NEARS (Noise, Nature, Effects, Ambient, Relaxation, Sound), New Age, Original TV/

• Artists who are not intercorrelated with each other, such as artists performing on the same song, or independent members of the same

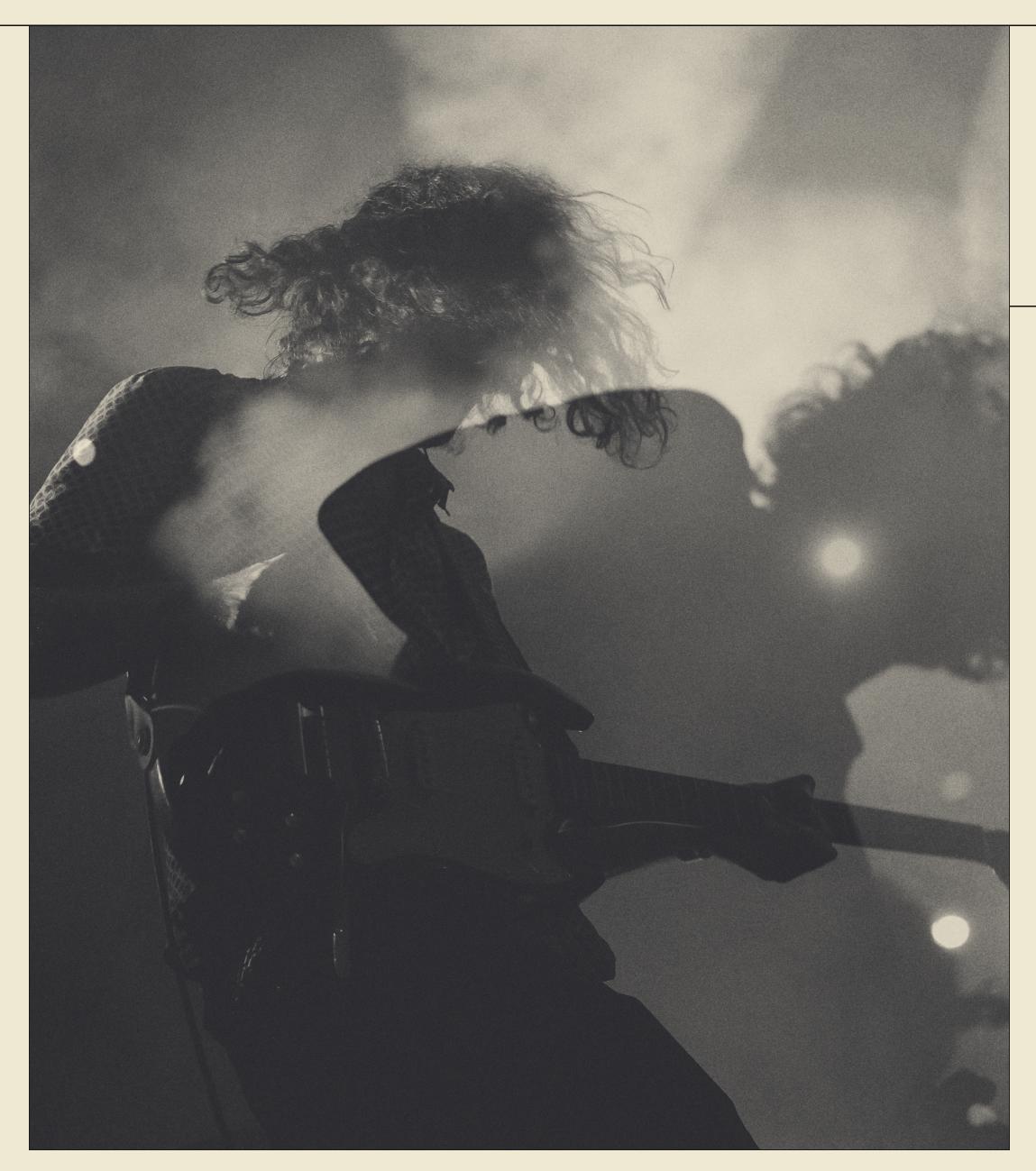


CHART ANALYSIS

Compared the performance of songs on the *Billboard* **Global 200 with their virality on TikTok**

PERIOD Week 1 - 39, 2024 (Dec 29 2023 - Sep 26 2024)	METRICS Chart position, song sales, song on-demand streams, TikTok virality (Week attained earliest virality score, ranging from highest (1) to lowest virality (8).)
SIZE 547 total songs	SAMPLE PARAMETERS Analyzed only the songs that were new to the chart in 2024 or had not been on the chart for at least a full year

Additional *Billboard* and Luminate charts also reviewed and incorporated for individual case studies

U.S. MUSIC 360 AND U.S. ARTIST & GENRE TRACKER

TOTAL SAMPLE SIZES

U.S. Music 360 n= 4016 U.S. Artist & Genre Tracker n= 4008

DATA COLLECTION

Online surveys using third-party panels were used to collect responses in the United States. Each study was available in both English and Spanish. Interviews were conducted among internet-using consumers ages 13 and above. The data is representative across the population's age, gender and geography based on the U.S. Census Information. Audience definitions and sample sizes are noted.

AUDIENCE DEFINITIONS

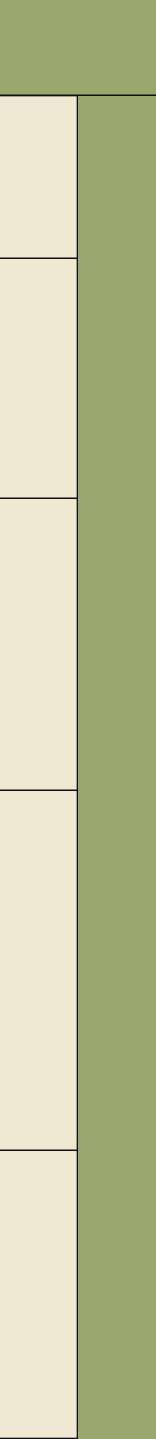
U.S. General Population: general population ages 13 and above in the United States
Music Listeners: Those who have listened to music as an entertainment activity in the past 12 months
Short-Form Video or Social Media Users: Those who have either used a short-form video or a social media platform in the past 12 months
TikTok Users: Those who use TikTok as a social media/short-form video platform in a typical month
Music Super Fans: Those who indicate five or more ways they engage with music artists from a battery of music behaviors

INDEXING

Throughout the report, there are references to indices - often noted by "X% more likely" statements. These indices reference a key comparison group, such as the U.S. general population or music listeners. Indices are calculated as X% of the sample group / % of the comparison group. As an example, an index of +20% means that an audience group is 20% more likely than the U.S. general population to behave in a certain way.

FIELD DATES

U.S. Music 360 Aug 12 - Aug 30, 2024 U.S. Artist & Genre Tracker Aug 2 - Aug 23, 2024



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