

The logo for LUMINATE, featuring the word in a bold, sans-serif font. The letters are white with a yellow outline. The 'L' is particularly large and stylized, with a vertical line extending from its top and bottom. The entire logo is set against a dark blue background.

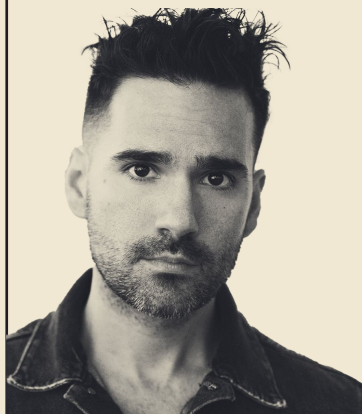
# LUMINATE

## RSD Summer Camp Physical Music Marketplace Update

August 2023

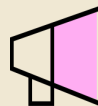


# Introduction



**Stephen  
Blackwell**  
Chief  
Commercial  
Officer  
NYC

# Agenda



- Physical Product Marketplace
- Vinyl
- CDs
- Cassettes
- Q&A

# Luminate

The trusted independent leader in Music consumption and audience intelligence now combined with Luminate Film & TV



**Consumption**



**Consumer  
Insights**



**Global  
Intelligence**

**billboard**

Luminate Data is the official data provider to Billboard for charts in the US, Canada & Global

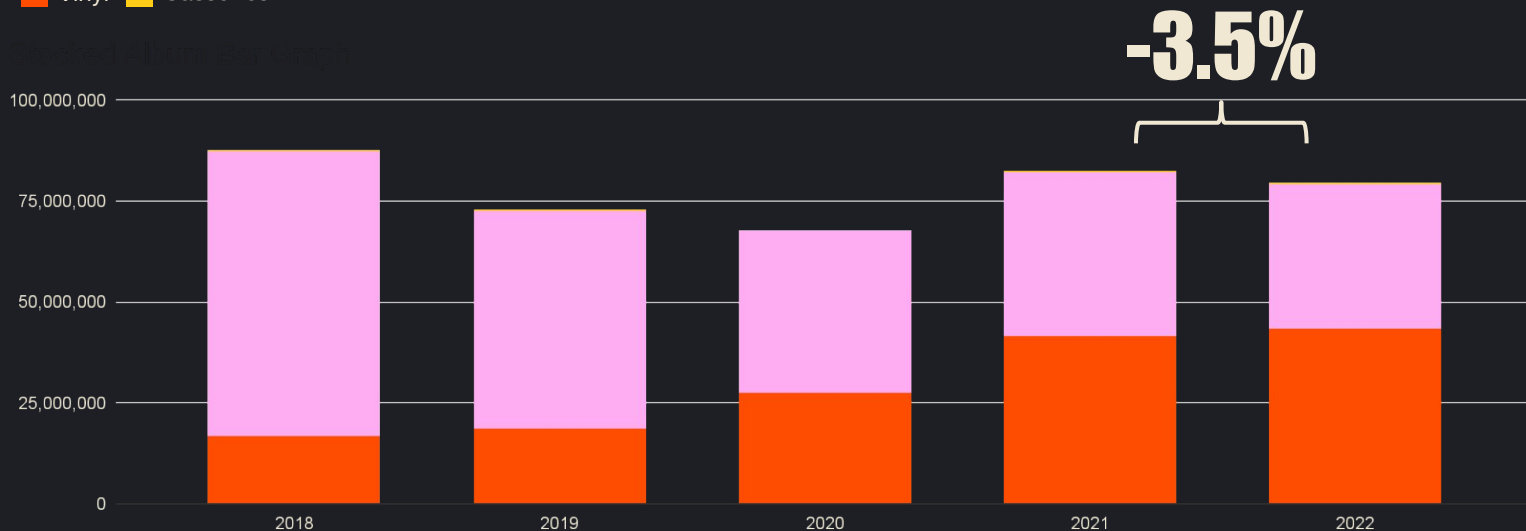
**LUMINATE**

# A Look Back: 2022 vs. 2021

At end of 2022: Overall Physical category down 3.5% as CDs fell 12% YOY; Vinyl up 4% and Cassettes up 28%

## Physical Album Sales by Format

CD Vinyl Cassettes

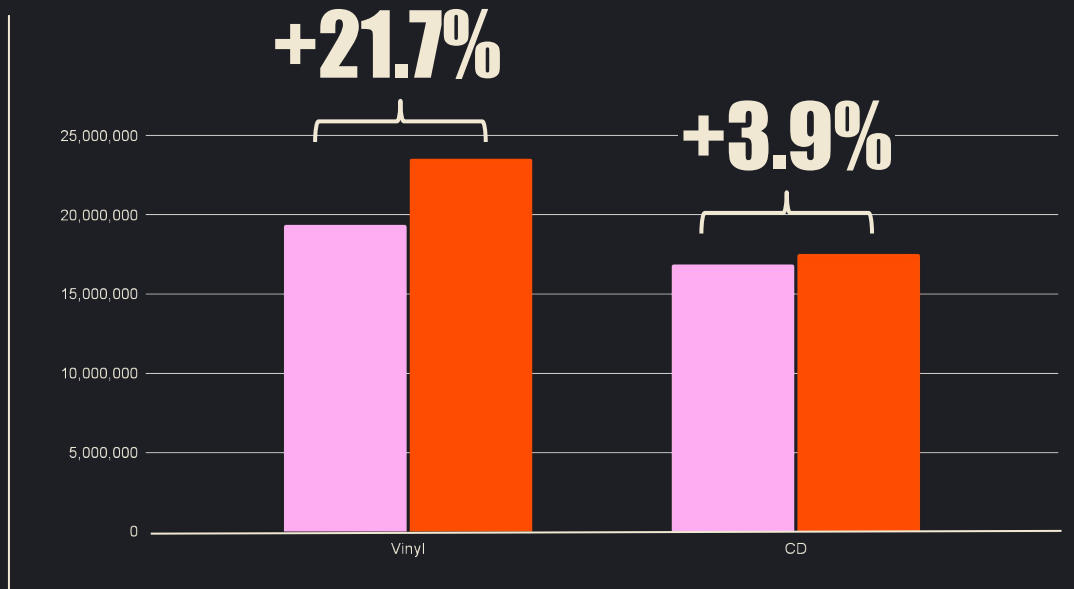


# 2023: Overall Physical Product Market Up 13%

## US Sales of Vinyl, CDs and Cassettes All Grow Through Week 26 vs TP LY

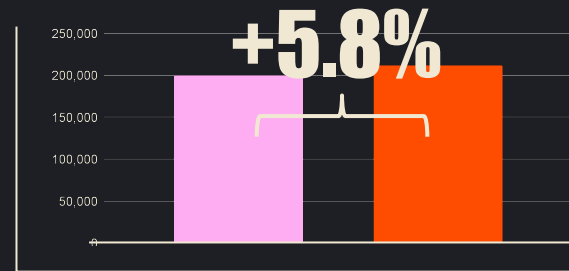
### Physical Album Sales

Thru Wk 26 2022 Thru Wk 26 2023



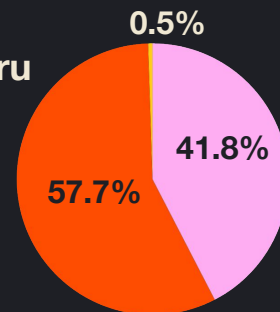
### Cassette Sales

Thru Wk 26 2022 Thru Wk 26 2023



### Album Share Thru 18 Wks

CD  
Vinyl  
Cassettes



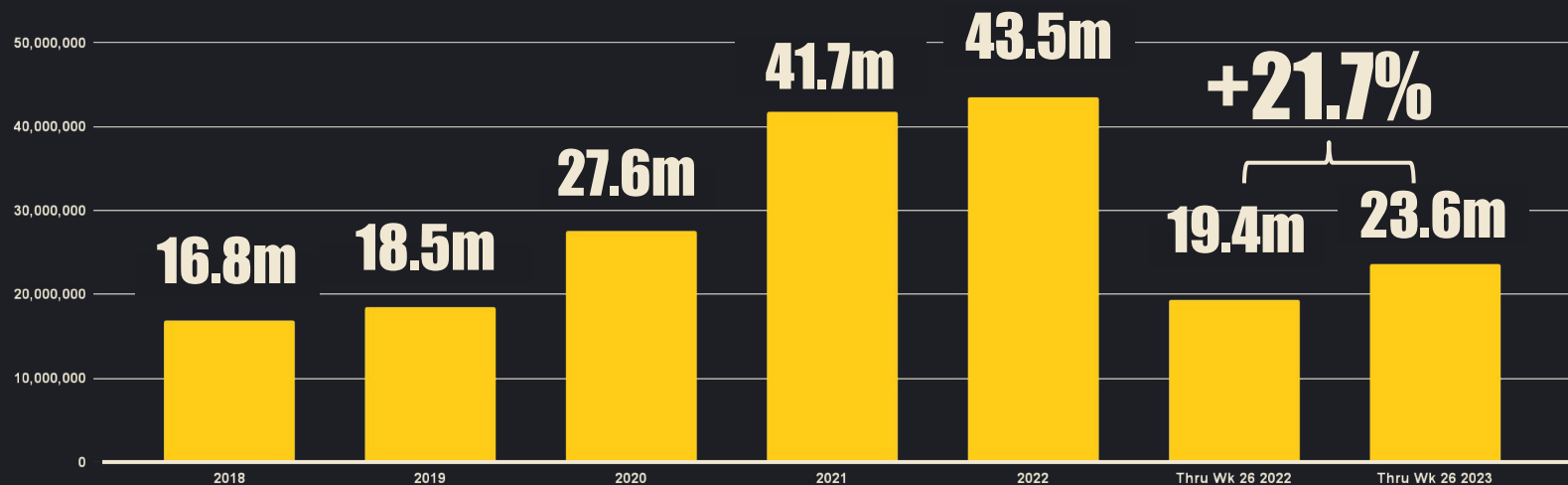
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## Let's Talk Vinyl



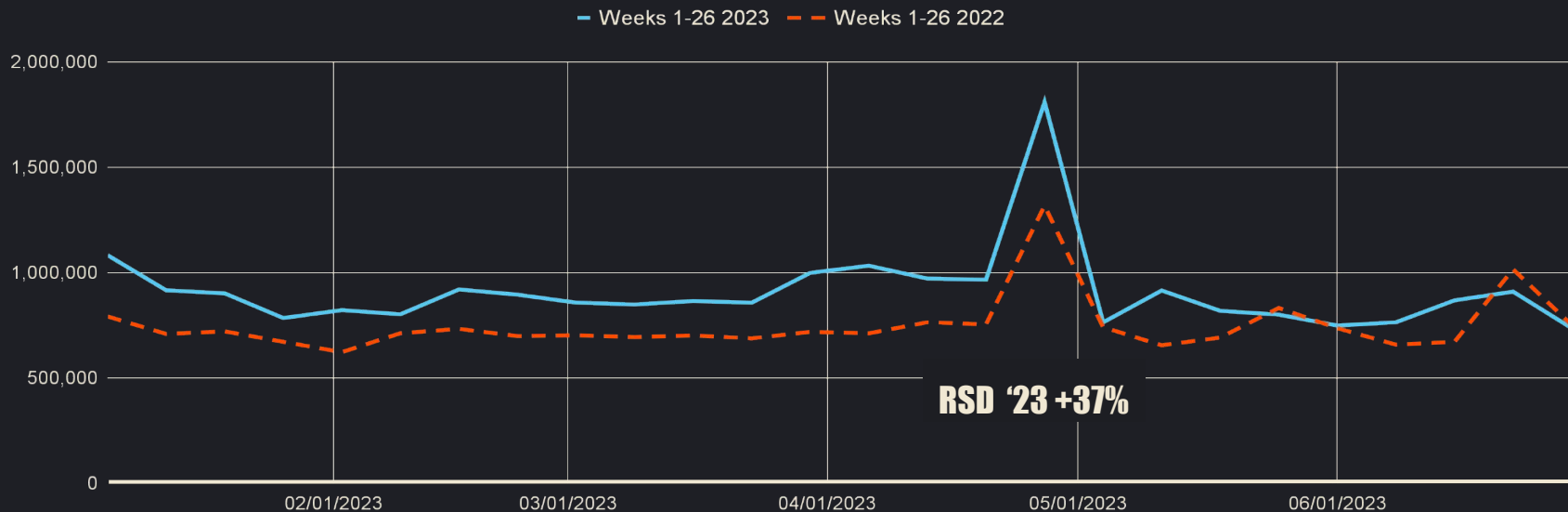
# US Vinyl Sales +21.7% Thru Wk 26 2023

## Vinyl Album Sales Since 2018



# LP Sales Average 161k Per Week More in 2023 vs 2022 Thru 26 Weeks

## LP Sales Through 26 Weeks in 2023 and 2022



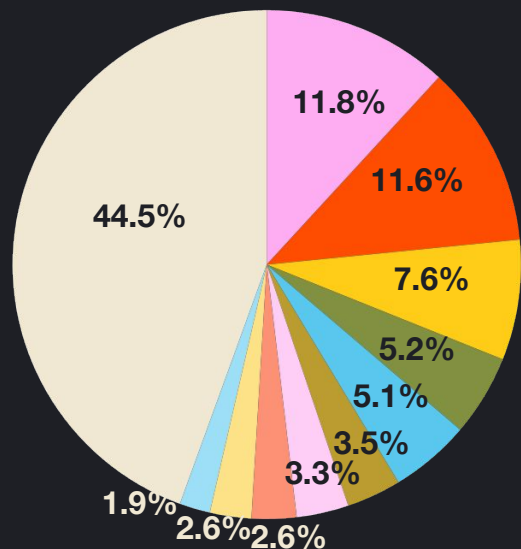


# Record Store Day 2023

1.67m Indie Sales Counted on April 22, 2023 for Biggest RSD ever;  
1.81m LPs sold week ending 4/27/23 (week 17)

## Top RSD 2023 DMAs

- Los Angeles, CA
- Boston, MA
- New York, NY
- Phoenix, AZ
- Chicago, IL
- Portland, OR
- Charlotte, NC
- Nashville, TN
- Philadelphia, PA
- Dallas-Ft. Worth, TX
- Others



## Top 5 Record Store Day Titles (LP/ Indie-only)

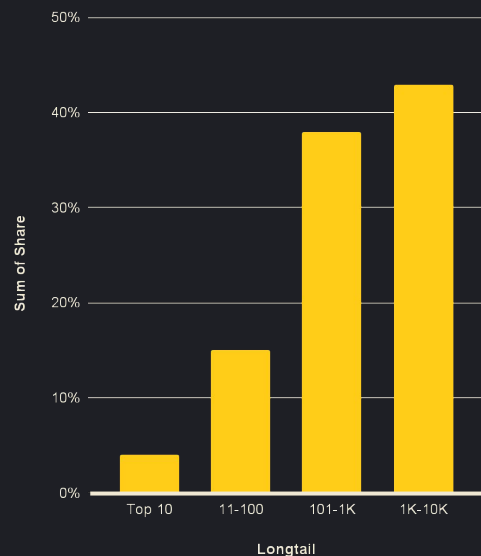
RANK	ARTIST	TITLE	SALES	BB 200 RANK (WK 17)
1	Taylor Swift	<i>folklore: the long pond studio sessions</i>	75k	3
2	Pearl Jam	<i>Give Way</i>	13.8k	26
3	The Cure	<i>Show (2023 Remaster)</i>	9.9k	77
4	Stevie Nicks	<i>Bella Donna Live 1981</i>	9.8k	127
5	Rolling Stones	<i>Beggars Banquet</i>	9.1k	118 (incl. std. version)

# Indie Retail Has More LP Sales Activity Down Longtail

## Mass Merchant Vinyl Sales More Top Heavy; IMO in the Middle

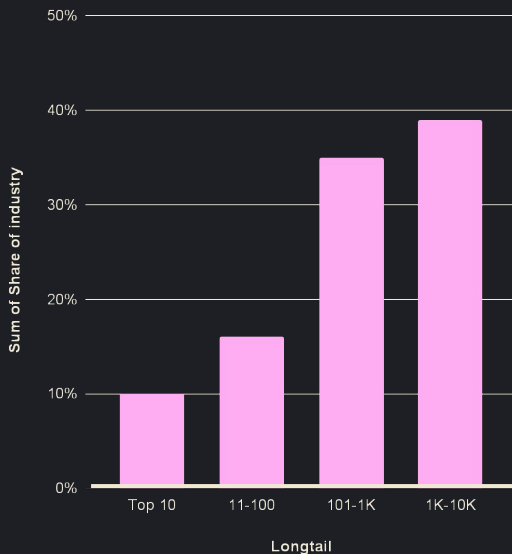
**Indie Retail Sum of Share vs. Longtail**

Indie Retail Sum of Share vs. Longtail



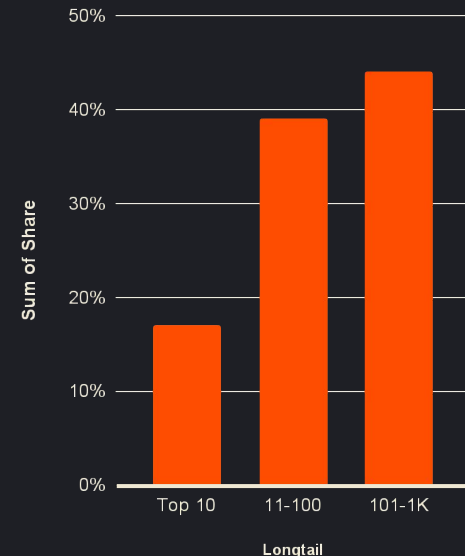
**Internet Mail Order Sum of Share vs. Longtail**

Internet Mail Order Sum of Share vs. Longtail



**Mass Merchant Sum of Share vs. Longtail**

Mass Merchant Sum of Share vs. Longtail



# Vinyl Buyers Who Don't Own a Record Player



# 42%

Of vinyl buyers **do not** own a record player, compared with 82% of consumers



# 57%

Gen Z Vinyl buyers who **do not** own a record player



# 52%

Millennial Vinyl buyers who **do not**



# 35%

Gen X Vinyl buyers who **do not**



# 16%

Boomer Vinyl buyers who **do not**

(INDEX TO GEN POP)

# Vinyl Buyers Are Younger & More Invested

Vinyl Buyer Behaviors & Preferences (Among Vinyl Buyers)

**+24%**



Vinyl buyers are more likely to be Gen Z

(INDEX TO GEN POP)

**+135%**



Vinyl buyers spend more money on music monthly

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# Vinyl Buyers Are More Likely to Agree That ...

Vinyl Buyer Behaviors & Preferences (Among Vinyl Buyers)

**+69%**



I AM THE FIRST AMONG MY FRIENDS TO DISCOVER NEW MUSIC AND ARTISTS

**+60%**



MY FRIENDS TURN TO ME FOR RECOMMENDATIONS ON NEW PRODUCTS, MUSIC, ETC.

**+30%**



I AM INTERESTED IN DISCOVERING NEW/EMERGING ARTISTS AND MUSIC

(INDEX TO MUSIC LISTENERS)

# Top Ten Vinyl Albums Thru Week 26 2023



1	Taylor Swift	Midnights	251k
2	Lana Del Rey	Did You Know That There's A Tunnel Under Ocean Blvd	132k
3	Taylor Swift	folklore	107k
4	Tyler, The Creator	IGOR	104k
5	Fleetwood Mac	Rumours	103k
6	boygenius	The Record	100k
7	Melanie Martinez	Portals	93k
8	Michael Jackson	Thriller	85k
9	Pink Floyd	Dark Side of the Moon	85k
10	Lana Del Rey	Born To Die	84k

# Top Vinyl Artists Thru Week 26 2023



Tyler, The  
Creator

1	Taylor Swift	808k
2	Lana Del Rey	335k
3	Tyler, The Creator	263k
4	Metallica	227k
5	Kendrick Lamar	214k
6	Pink Floyd	188k
7	Beatles	178k
8	Fleetwood Mac	171k
9	Melanie Martinez	166k
10	Harry Styles	157k

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## Let's Talk CDs



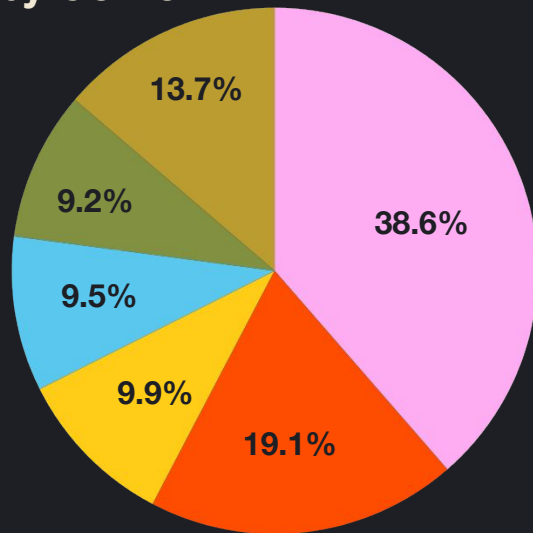


# K-pop Powering 2023 CD Sales to +3.9% Over 2022 (Wk 26 2023 vs TP LY)

World Music is 9 of Top 10 CDs and continues to Gain Share on Strength of 3.2m in 2023

## CD Sales by Genre

- Rock
- World Music
- Pop
- R&B/Hip-Hop
- Country
- Others



**#1** Tomorrow X Together  
*The Name Chapter: TEMPTATION*  
395k

**#2** Stray Kids  
*5-Star*  
322k

**#3** Twice  
*Ready To Be*  
258k

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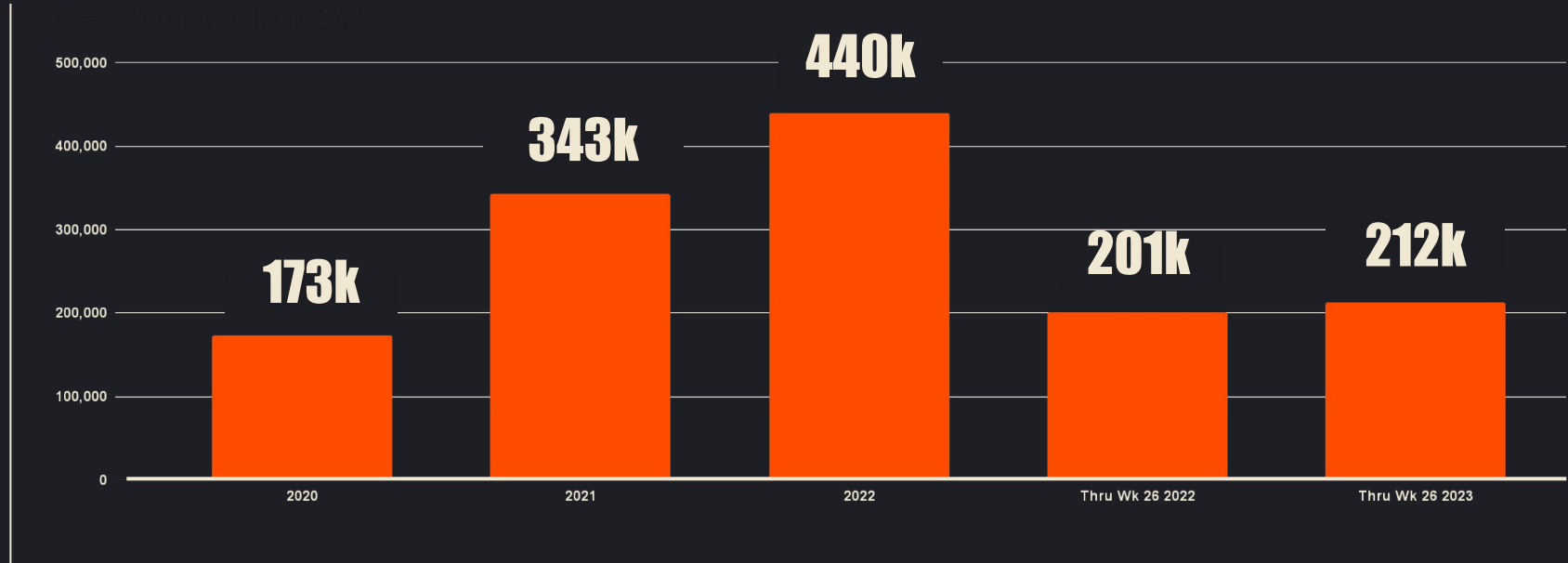
**Let's Talk Cassettes**



# Cassette Sales +5.8% Thru Wk 26 2023

Growth slowing after 2022 showed +28% YOY

## Cassette Album Sales Since 2020





Billie  
Eilish



The  
Weeknd

## Who's Buying Cassettes?

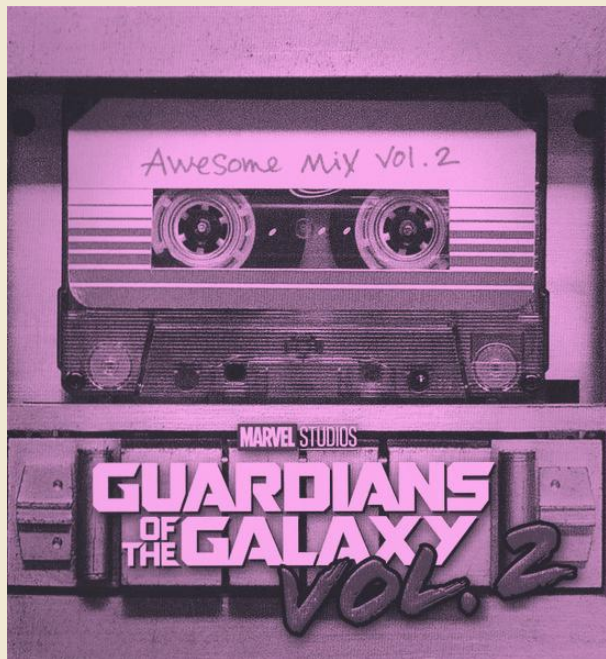
**1/3**

Of cassette  
consumers  
are Gen Z

**+129%**

Cassette buyers  
spend +129%  
more money across  
music categories  
than the average  
music listener

# Top Ten US Cassette Albums of 1H 2023



1	Soundtrack	<i>Vol. 2 Guardians Of The Galaxy</i>	8.5K
2	Soundtrack	<i>Guardians Of The Galaxy: Awesome Mix Vol 1</i>	7K
3	Metallica	<i>72 Seasons</i>	6.5K
4	Nirvana	<i>Bleach</i>	4.8K
5	De La Soul	<i>3 Feet High &amp; Rising</i>	3.3K
6	Phoebe Bridgers	<i>Punisher</i>	3.2K
7	Ghost	<i>Phantomime</i>	2.9K
8	Lana Del Rey	<i>Did You Know That There's A Tunnel Under Ocean Blvd</i>	2.9K
9	Taylor Swift	<i>Midnights</i>	2.6K
10	Paramore	<i>This is Why</i>	2.4K

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Questions? Please reach out to: [jmarconette@luminatedata.com](mailto:jmarconette@luminatedata.com)