

MUSIC TECH: CRACKING THE INNOVATION CODE

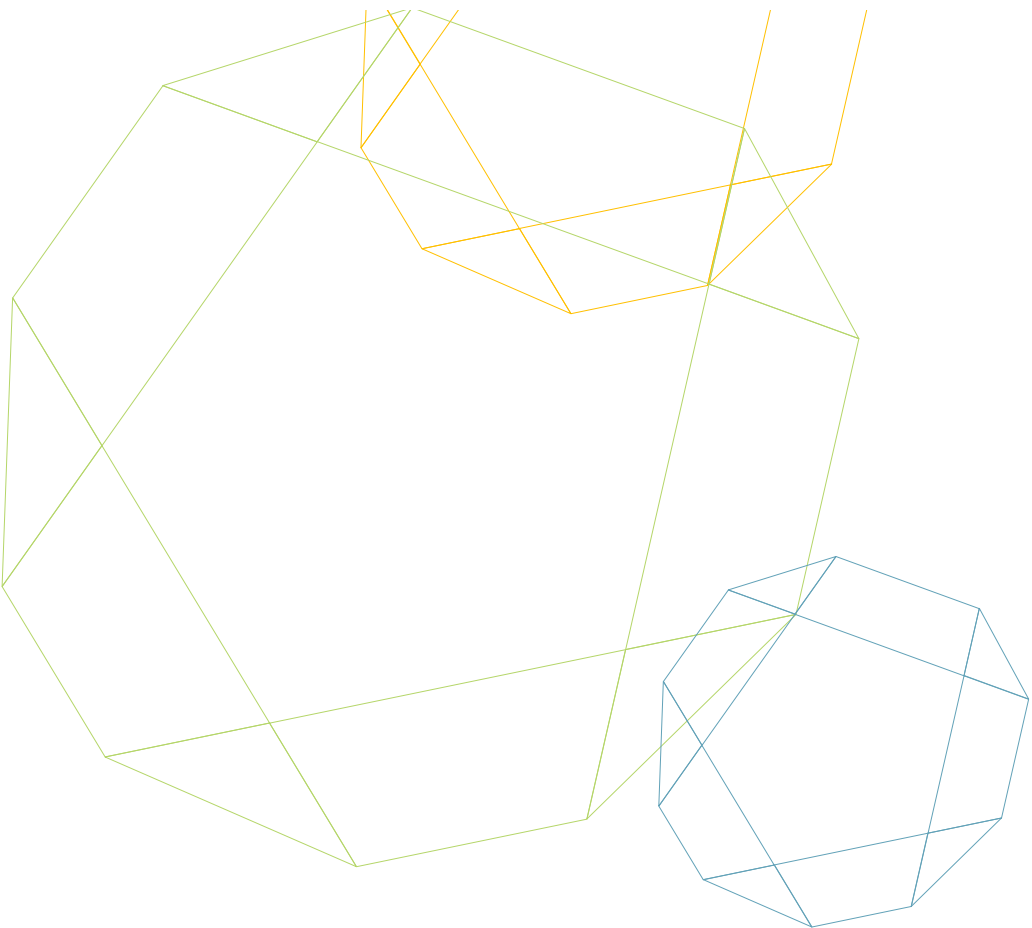


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1. INTRODUCTION

It is only about decade ago that Spotify launched. The platform and its rivals have used streaming technology to disrupt and drastically alter the way the music industry sells, distributes and delivers music to fans.

Streaming is now an established format. In addition to reporting a 5.9% growth in global music sales last year, industry trade body IFPI said streaming revenues jumped 60%-plus.

But, in terms of technology, streaming has gone mainstream and the future is already fast catching up with us. A plethora of new advance technologies are emerging. And they could dislocate the increasingly tech-centric business we work in today, if the music sector is not prepared.



1. INTRODUCTION

Artificial Intelligence (AI), blockchains, Augmented Reality (AR), Mixed Reality (MR), Virtual Reality (VR), holograms, robotics, voice-activated digital assistants and chatbots look set to permeate the way music is shared, consumed, monetised and even created.

The physical-disc format, including vinyl and CDs, is more than a century old. It has just about remained intact in today's tech-centric media-and-entertainment business, which is dominated by the Internet behemoths (Google's owner) Alphabet, Amazon, Apple and Facebook. As a result, although physical still sells, it is at a declining rate.

This was followed by the raid of smartphone apps like Snapchat, Instagram and WhatsApp, which literally placed content access in consumers' hands.

Now, we're already hearing about whole albums being composed with AI, and music being experienced with AR.



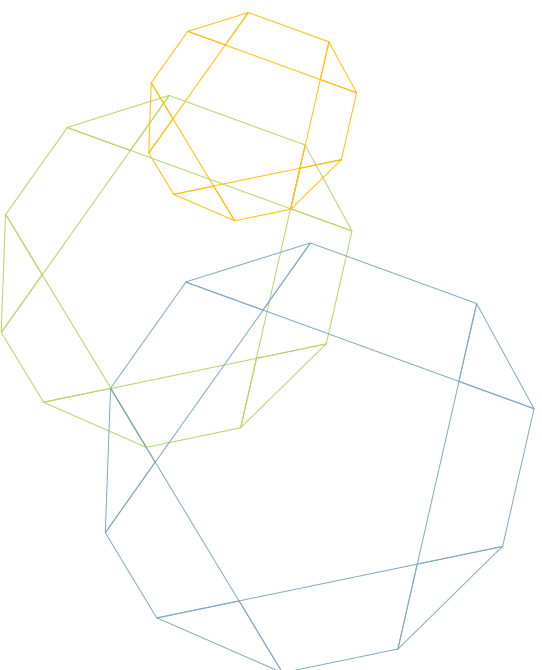
1. INTRODUCTION

Chatbots offer not only the labels, but also the artists, more streamlined ways to market their releases directly to fans. Robots just might replace songwriters. Really?

Yet, **anyone investing and working in the global music community as it is today must be prepared to pivot** (as the international tech community puts it) and manage the inevitable transition period coming.

To help artists, rights owners and executives handle the potential friction such outright innovation might throw at music enterprises, large and small, **this MediaTainment Finance White Paper for Midem analyses the new tech systems, compiles statistics and interviews experts about an industry's future that is almost here.**





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2. MUSIC TECH INNOVATION: STATS



ANALYSIS OF TECH STATISTICS: THE POTENTIAL IMPACT ON MUSIC

This section features a list of statistics that confirms the pervasive use of social media and messaging apps, plus the potential huge impact of new advance technologies.

These figures are not definitive and forecasts are never facts – just guidelines. But as viable media-and-entertainment creative, distribution and marketing tools and platforms, the tech systems are here to stay and are still growing. Moreover, the established tech giants, from Facebook to Apple, are investing in them. So, it is worth having a look.

Twitter might be lagging behind its goliath rival Facebook, in terms of the number of users. But its reach among consumers is too big to be ignored equally. Next-gen messaging apps, from Snapchat and Facebook Messenger, are also chasing after consumers.





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We've included WeChat, the messaging app from Chinese media-and-tech titan Tencent Holdings. **This is to remind us that the Anglo-American digital-media platforms and services are also facing tough competition in China,** from Tencent and its rivals such as Alibaba Group Holding and Baidu.

Additionally, Facebook, Google and their ilk are all ferociously challenging legacy media, from TV to print magazines, for a share of the world's billions of advertising dollars. This gives them the financial clout to integrate the fast-emerging next-gen technologies like AI, VR, AR, IoT and chatbots into their existing businesses.

Their influence on the way the media, entertainment and creative industries adopt the next-generation tech looks set to be even more powerful.





THE TECH STATISTICS

328
MILLION

TWITTER: monthly active users
worldwide in second quarter of 2017

173
MILLION

SNAPCHAT: daily active users
worldwide in second quarter of 2017

2
BILLION

FACEBOOK: monthly active users
worldwide in second quarter of 2017



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700
MILLION

INSTAGRAM: monthly active users
worldwide in second quarter of 2017

1
BILLION

WHATSAPP: monthly active users
worldwide in third quarter of 2017

1.3
BILLION

FACEBOOK MESSENGER: monthly active
users worldwide in third quarter of 2017

1.5
BILLION

YOUTUBE: monthly active users
worldwide in second quarter of 2017



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960
MILLION

WECHAT: monthly active users
worldwide in second quarter of 2017

7.5
BILLION

VOICE-ACTIVATED DIGITAL ASSISTANTS:
devices installed worldwide by 2021

\$74.82
BILLION

VIRTUAL REALITY: revenues generated
by 2021 from \$7.17bn expected in 2017

\$133.8
BILLION

AUGMENTED REALITY: value of global
market by 2021 from \$3.33bn in 2015



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80%

CHATBOTS: share of businesses (in the UK, France, South Africa, the Netherlands) already using or planning to use chatbots by 2020

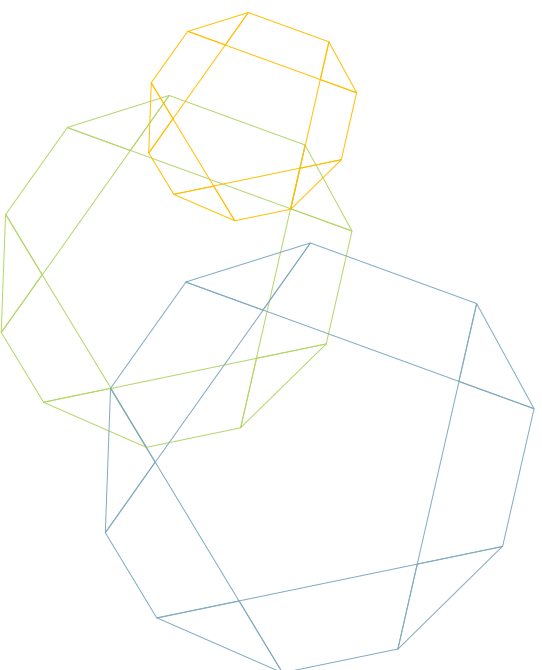
\$267 BILLION

INTERNET OF THINGS: global investment in IoT by 2020

\$15.7 TRILLION

ARTIFICIAL INTELLIGENCE: contribution to global economy by 2030

Sources: eMarketer; A to Z Research; Facebook; Twitter; Snap Inc; Ovum; PwC; Boston Consulting Group; McKinsey & Company; Oracle; Business Insider



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3.MUSIC TECH INNOVATION: CRACKING THE CODE



- **Music Tech Innovation: Cracking the Code (an analysis)**

Time Out, the UK-based iconic entertainment-and-culture listings magazine, recently predicted that music will be delivered directly into computer chips embedded in our brains by 2049.

As far-fetched as that idea might be, there is a spate of new-tech developments taking place that could radically alter even the digitally driven way music is already produced, distributed, marketed and created.

Artificial Intelligence (AI), algorithms, robotics and automation are permeating almost every industry that exists today, including the music business.

AI is also contending with blockchains, the technology associated with the bitcoin digital currency, for the music sector's attention. Add to that Virtual Reality (VR), Augmented Reality (AR), Mixed Reality (MR), holograms, chatbots and other unknown developments lurking inside some start-up's app.





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Artists, labels and rights owners need to respond proactively to their emergence, declares Paul Pacifico, Chairman/CEO of UK independent-labels organisation AIM.

“WE HAVE TO HELP SHAPE THE LANDSCAPE”

Paul Pacifico, Chairman/CEO, AIM

“The rights landscape in the physical world will be mirrored in some way in the virtual digital world. We have to help shape that landscape or be stuck with whatever is given to us,” he says.

AIM recently announced a new partnership with UK-based Digital Catapult, the government-funded innovation centre. It will introduce early-stage tech start-ups to AIM members to ensure that tech products being developed are relevant.

“This will ensure they are creating tools that are market-ready and minimise R&D (research and development) wastage,” Pacifico adds. “We shall also look to raise a small fund to help enable the pilots to work.”

The music industry’s DNA might be artistic and creative. But AIM and other organisations recognise that the business must brace itself for these new tech advances.





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Arguably, the business is still adjusting to the disruptive impact of the evolving streaming services, mobile apps, social media and recommendation engines. And the emerging technologies mentioned above are still in their infancy. It is, however, time to consider moving beyond smartphone apps to a brave new phase.

AI, smart speakers and chatbots

Powered by AI and machine learning, robotics tech might replace factory jobs and make driverless cars possible. But can it compose and play original structured music?

Start-ups like US-based Amper Music ([see interview, Chapter 3](#)), Jukedeck and AI Music in the UK, Australia's Popgun and Aiva Technologies in Luxembourg are among several tech ventures proving machines should be able to compose music.

Sony Corporation hopes to produce AI-created recordings at its Paris-based Computer Science Laboratory. And consultancy giant Accenture has launched Symphonologie, an orchestral work created from AI-selected data.

Artists are catching on. Last year, the legendary Brian Eno promoted his new album *The Ship* with an AI-created music video. US singer/YouTube personality Taryn Southern recently brought out *I AM AI*, which is thought to be the first album totally composed with AI.





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AI could also end up influencing how recorded and live music is marketed. Voice-activated digital assistants and smart speakers like Amazon's Alexa, Microsoft's Cortana, Google Home and Apple's Siri are being used by young fans to discover music they want to listen to on streaming platforms.

And chatbots, the Q&A software used by online stores to answer customers' queries, are forecast to help music marketing departments streamline their routine services, leaving them more time to focus on the artist and fans.

Blockchains

Blockchains' supporters claim its underlying infrastructure makes it difficult for digital data gathered by humans to go wrong.

Dogged by fragmentations within the industry, the metadata collected to describe a recording (artist's name, songwriters, producer, label, recording studio, when recorded, where) has frequently failed to match the metadata that describes the original composition.

This has hurt rights owners, especially in disputes about who owns which copyrights. Open-source blockchain start-ups like JAAK, Imogen Heap's Mycelia, MusicBrainz and Dot Blockchain Music are among the specialists offering blockchain platforms the music industry could one day use to identify a recording's copyright correctly.





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This explains why three major collection societies, US-based ASCAP, PRS for Music in the UK and France's SACEM, are collaborating on a blockchain project. It aims to slash the inaccuracies that make it difficult to match a song's metadata to those on the recordings of that tune.

“WE TALK ABOUT THE DATA PROBLEM; THIS IS NOT NEW”

Paul Dilorito, Director of Operations,
PRS for Music

This explains why three major collection societies, US-based ASCAP, PRS for Music in the UK and France's SACEM, are collaborating on a blockchain project. It is designed to slash the number of inaccuracies that make it difficult to match a song's metadata to those on the various recordings of that tune.

“We talk about the ‘data problem’. But this is not a new; it has been around for 100 years,” notes Paul Dilorito at PRS for Music ([see his interview in Chapter 3](#)). “And performance rights organisations (PRO) have spent that time trying to match the works to their recordings.”

New York-based Dot Blockchain Music is among the music blockchain specialists PRS for Music has talked.





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As Dot Blockchain Music CEO Benji Rogers recently told Midem Preview magazine: “In 2017, there’s no clear information about who owns what when it comes to the world’s repertoire. With blockchain, everyone will be able to see who’s abusing the rights.”

Confusing metadata is turning music licensing into an unnecessarily burdensome activity, observes Vaughn McKenzie, CEO of London-based startup JAAK, a blockchain-tech specialist building a decentralised data network that will enable creators to offer click-through licences for the use of their content.

“In the future, as they chase the demands of consumers, content platforms will continue to innovate around the ways we interact with content, and the licensing needs to evolve to facilitate that,” McKenzie states.

“Creating a platform that makes it easier for developers and entrepreneurs to experiment with content is the best way to accelerate the renewed growth in the music industry.”

Even music fans, who find that the wrong metadata can make it difficult to discover new recordings to enjoy, are contributing to the music blockchain debate via MusicBrainz, a not-for-profit crowd-sourced operation run by Barcelona-based MetaBrainz Foundation founder Robert Kaye.





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“We were the type of people who wanted to organise our CD and vinyl collections,” he says. “But with the arrival of streaming, some of us stopped. You no longer felt compelled to tidy your collection. So our user base has a different motivation: knowledgeable information we want to share.”

The growing sophistication of MusicBrainz’s metadata has attracted major-corporation subscribers like UK public broadcaster BBC, search engine behemoth Google, concert-tickets seller Ticketmaster and UK-based 7digital, the international digital music and radio services provider.

AR (Augmented Reality)

Augmented Reality features computer-generated 3D images superimposed on into your real-life surroundings. Imaging walking into your living room to find a virtual version of your favourite artist waiting to sing for you.

The tech’s popularity soared last year after the amazing success of Pokémon GO, the free-to-play location-based mobile game. The record-breaking app has been downloaded more than 650 million times.

So with the right AR app, could artists generate similar figures in sales? Like a lot of emerging tech, AR’s use in music is still evolving.





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But some attention-grabbing projects include the exclusive AR campaign by Shazam, the music-discovery app, to promote *Scream*, the Michael Jackson compilation album that dropped in September (see [Shazam interview in Chapter 3](#)).

Point your smartphone at the album's poster and the app will trigger the first-ever AR experience linked to a Michael Jackson album.

Then, check out the live AR-stage app from Irish start-up Firststage, which aims to literally place a 3D version of a gig in the palm of your hand or on the table in front of you.

Meanwhile, singer-songwriter Beatie Wolfe released her album *Raw Space* with the world's first live 360° AR album stream earlier this year.

The ARkit software in Apple's iOS 11 operating system is among the new services expected to encourage app developers to create more AR experiences for iPhone and iPad users.

And Facebook has introduced AR Studio, which invites developers to create tech that artists and designers can use to produce AR images for its Camera Effects platform, which is in beta.





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VR, 360° and MR

Virtual Reality totally immerses users into a computer-generated world. You might not be able to see your immediate real-life surroundings, as you can with AR, but it offers the possibility of front-row seats at a virtual recording of a stadium concert.

Shared VR also offers the chance to be at the same concert with your friends, even if they are physically located in different parts of the world.

Facebook, the tech giant valued at more than US\$530bn, recently reported its best quarter earnings ever, generating US\$10bn-plus in revenues during the three months ending 31 September 2017.

That treasure trove has given the company the clout to become a staunch influencer in the VR space, especially after paying US\$2bn for the company making the Oculus Rift headset and VR tech in 2014.

Rival Google, YouTube's owner, is also an investor in VR headset and content tech. Like Facebook, YouTube offers a 360° videos, which have introduced consumers to a free VR experience before they commit to the full VR version that requires the still expensive headsets to wear.





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Artists that have experimented with melding recordings with VR include Bjork, Paul McCartney, Jack White, Queen, Coldplay, Scottish band Biffy Clyro and US singer-songwriter Dawn Richard.

The studios offering music-VR production services include US-based NextVR and the UK's MelodyVR, which is listed on the AIM stock exchange via parent company EVR Holdings.

MelodyVR has been making significant headway in acquiring the rights that could make it the biggest international player in this space. In October, it sealed a licensing deal with Jay-Z's Roc Nation label and Roc Nation Publishing.

This agreement comes after forming partnerships with the three majors labels: Universal Music Group, Sony Music Entertainment and Warner Music Group. Additionally, it has raised £15m in new funding in its bid to expand into the US.

Mixed Reality is more or less a hybrid of Virtual and Augmented Reality. This time, the virtual and real elements in your environment are fully integrated.

Microsoft's HoloLens, which remains restricted to content creators (as opposed to consumers) is said to be the most successful MR platform to date.





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Although its commitment to the music business is limited, HoloLens has been used by Israel-based Octosense to recreate a Rihanna concert for users.

HoloLens' biggest rival could be Magic Leap, a US start-up that has collected an estimated US\$1.8bn from investors (including Google, China's Alibaba Group and Warner Bros. Entertainment). However, the much-anticipated product is still in stealth mode, so only its creators and investors have any idea of what it is capable of.

Holograms

Adding recorded tracks to audio-visual formats like VR and AR in some way continues the trajectory of traditional music videos.

But developing tech to re-enact and enhance what fans can see and experience at a concert venue has not been easy (see [Tiger Heart interview, Chapter 3](#)).

Yet, the combination of the 19th-century technology known as Pepper's Ghost with 21st century machinery has enabled companies like US-based Digital Domain, Mursion in the UK and London innovation agency Holition to resurrect deceased superstars to perform live on stage in front of adoring crowds.





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The most famous of these projects has been the late rapper Tupac Shakur's holographic gig at the 2012 Coachella Valley Music & Arts Festival in California.

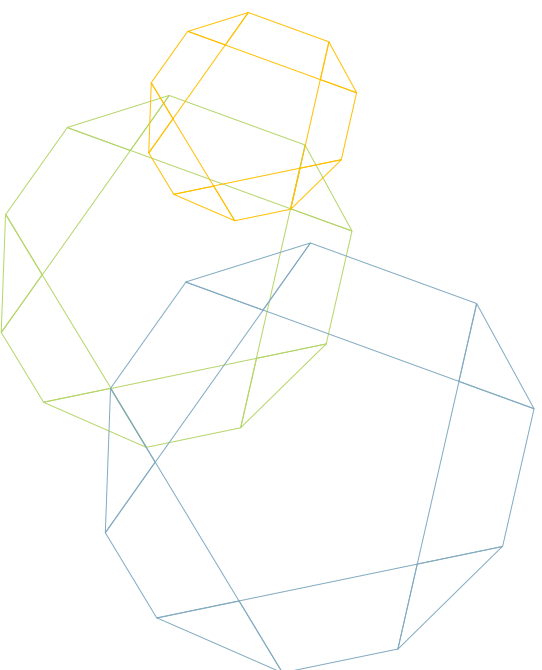
Meanwhile, Eyellussion in the US has received permission from the estate of Frank Zappa to use its own tech to produce hologram performances featuring the maverick rock star who died in 1993.

The hologram techniques involved have not caught on as some supporters had hoped. They are complex, expensive and the results are not as life-like as they should be.

Even UK singing superstar Damon Albarn recently told Wired magazine he had hoped the technology would be ready for his virtual band Gorillaz to use during its current international tour.

But technological progress, such as the rapidly growing use of **ultra high-definition 4K image resolution on TV screens**, is forecast to create holograms that will look as life-like as what the human eye can see in the real world.





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4. MUSIC TECH INNOVATION: INTERVIEWS



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**Drew Silverstein, Co-founder/CEO
Amper Music, New York City, US
Technology: Artificial Intelligence (AI)**



Amper Music, created by a team of composers and technologists (including Silverstein and his co-founders Sam Estes and Michael Hobe), has been hitting the headlines for enabling users to write original music powered with AI tech. In March 2017, the start-up company raised US\$4m led by venture capital firm Two Sigma Ventures with contributions from Advancit Capital, among others. Silverstein clarifies why AI-created music is meant to boost creativity and not replace human composers.

Q: What inspired you to include AI in the creation of your music?

Silverstein: Many film, TV and video games directors and producers would come to us wanting to commission original music but did not have the time or budget. However, we're experts in translating emotions into music and vice versa. So, we wondered if we could build AI to do so. Everyone on the team is a professional musician. At the same time, everyone is a world-beating expert in other fields, including music technology. So we built Amper Music. It truly collaborates with artists and composers to further their own creative efforts.



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Q: How does it work?

Silverstein: Amper requires three pieces of information about the music you want to create: the mood, the genre, and the length of the track. If you want to add rhythm, melody and harmony, that is also possible. Once you've created the music, Amper invites feedback and will make revisions until you get the perfect piece of music. You download it and get global royalty-free perpetual-use licence. Amper is open to the public for personal and private use.

Q: What are your long-term goals for using AI in your works?

Silverstein: Human composers are not going anywhere. Functional music, the kind of music played in a hotel's elevator, is valued for its usage, not the creativity. Artistic music is valued for the creation that went into making it, for the weeks and months people spent working on something very artistic. People will always value that. For functional music, Amper will be an end-to-end service. And for artistic music, it will be part of the musical tool kit. It enables more people to join the creative class.

Q: As AI, Virtual Reality, Augmented Reality and other use of data influence the future of the music business, is there a danger of emerging tech confusing the direction of a business that is already complicated in terms of copyright, revenue streams?

Silverstein: Some might argue that the music business has been confused for the past 20 years. There has been a constant state of evolution and that still exists. Amper's call is to enable content artists to create and be part of the conversation.



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**Paul Dilorito, Director of Operations
PRS for Music, London, UK
Technology: Blockchain**



PRS for Music, the UK performance rights organisation (PRO), has joined forces with its French counterpart SACEM and US-based ASCAP to work on a royalties-collection blockchain project. The mission is to ensure rights owners receive all the royalties they are entitled to for the use of their music worldwide. Collaborating with computer giant IBM and the open-source tech organisation the Linux Foundation, they are using blockchain to confirm that the metadata details describing a song matches the information on the song's recordings, while correcting any errors discovered. Dilorito explains why blockchain might curtail the never-ending disputes over copyright ownership.

Q: The joint PRS, ASCAP and SACEM blockchain project; what stage has it?

Dilorito: The three societies brought together 7 million compositions and the associated recordings. This is based on works featured in distributions during 2016. Basically, we're matching the metadata for recorded music's International Standard Recording Codes (ISRC) and those for musical works' International Standard Work Codes (ISWC). The good news is that more than 90% of the ISWC metadata do match the ones for the ISRC. The idea of three societies sharing data is to eliminate duplication via an authoritative source. If something doesn't look right, the copyright owners can say so and correct it.



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Q: Why does the international music industry need this type of tech now?

Dilorito: Blockchain is a hot topic now because the world is moving from blanket-licensing business models to transactional models that can be invoiced within short timelines. You, therefore, have a very short window to identify the rights you're licensing. And because the transactional volume on streaming platforms is large, you have a lot of music consumption at a low cost. For that, you need smarter, cheaper and reliable ways to identify music in that long tail across borders for each PRO. We want to sell music. When you look at the metadata as it has been, you start seeing ISRC information that is not complete, or made up, or duplicated. So, the current blockchain project has been useful in exposing them. Once we agree on what we've achieved, we can think of other metadata to add and which parties to work with, such as other PROs and neighbouring-rights organisations.

Q: Was the move to launch the project also influenced by the late lamented Global Repertoire Database (GRD)?

Dilorito: The GRD concept was a good idea: a centralised place of data to trade with. But the GRD involved many players, all of whom had good intentions. For such a complex project, you need to bring in people gradually otherwise it can get bureaucratic. Some of the original GRD concepts around data hierarchy were robust and we've leveraged some of that thinking. Unlike the GRD, this blockchain project is a more open-sourced and collaborative way to exchange data with more authoritative rules that the industry can buy into.



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**Greg Glenday, Chief Revenue Officer
Shazam, New York City, US**
Technology: Augmented Reality



In March 2017, Shazam, the popular app used to identify and discover creative content like songs, movies or TV commercials by holding up your smartphone to the audio or visuals, also introduced its own AR platform. Ideal for marketing campaigns, you use the smartphone's camera to scan an object participating in a campaign, like a newly released CD. This triggers the AR app to offer unique experiences like related 3D animations and 360° videos. With the original Shazam being used 20 million times daily to discover music, Glenday discusses how Shazam AR could transform music marketing further.

Q: What made this year the right time to launch Shazam's AR tech?

Glenday: Since launching visual-recognition functionality in 2015, Shazam has partnered with brands like Bombay Sapphire gin, Maltesers and Fanta plus artists like Harry Styles, The Chainsmokers and Lorde to seamlessly connect its users to innovative custom content. For us, AR marked the next huge—yet natural—step forward. It has become a cornerstone to engage users in immersive experiences and allow brands to reach audiences through a compelling, interactive new medium.



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Q: A view on how AR can contribute to music's storytelling to fans.

Glenday: Shazam AR can bring any marketing material to life—products, packaging, advertising, events and more—just by utilising the app to scan unique “Shazam Codes.” The codes are capable of delivering AR experiences including 3D animations, product visualisations, mini-games and 360° videos. Possibilities for artists and brands to engage and give more content to fans are simply infinite. One recent example was Michael Jackson’s album *Scream*, for which we developed an immersive AR experience for consumers who Shazamed codes inside the CD and vinyl packaging.

Q: And like all new tech developments, what realistic challenges does the AR tech still need to overcome?

Glenday: One of the things missing from the AR technology has been the device that people have to buy to use it and a frictionless way to deliver these experiences at scale. Because Shazam has such a massive install base, and consumers are already accustomed to using the app for discovery, we feel strongly that we have now solved that problem.



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**Sanj Surati, Founder/Digital Atelier
Tiger Heart, London, UK
Technology: Hologram**



Some of the most exciting tech-centric entertainment has been the creation of holographic images that 'bring back to life' dead music superstars like Michael Jackson and Tupac Shakur to perform live on stage. The move could open up new avenues in the concerts business. Surati, whose specialist skills included creating immersive experiences for brand owners at London-based innovative companies Musion and Holition, worked on Tupac's 'resurrection' at the Coachella Festival in 2012. He comments on the potential and pitfalls of using holographic imagery in live entertainment plus the new developments that could make them a more realistic feature in live music.

Q: Examples of the deceased artists revived to perform live while you were working at Musion. And which ones have you heard off since you left?

Surati: I worked on Frank Sinatra, Rodney Dangerfield and 2Pac. I also worked on Renato Russo in Brasilia when I was at Holition. There was a Michael Jackson and Whitney Houston hologram when I left. However, they did not really capture the essence of the famous artists. It is not easy to recreate someone who is no longer with us.



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Q: The tech is based on the traditional Pepper's ghost concept; what modern day technology has been added to make the performances life-like?

Surati: The Pepper's-ghost format is starting to be delivered in (ultra high-definition) 4K format, which makes the image look much more real. Things like beads of sweat and dust really add to the realism of the final activation. There are so many companies claiming to be able to deliver the Star Wars R2D2 concept, but none of them actually work at this stage.

Q: What challenges does any concert promoter seeking to adopt these holographic images need to be prepared for?

Surati: Usually, the majority of concert promoters are usually very risk-averse and more focused on making money then investing in innovative concepts that can benefit the industry. Fortunately, not all of them are like that. However, I have been working in live music for 22 years and have learned to never hold my breath when speaking to them. The more open-minded creative ideas usually come from the music artists first and the set designers.

Q: Is there room for more of these holographic live performances - at concerts and festivals? Or they likely to become gimmicks that fade away?

Surati: There is always room for innovation. The key is to ensure that the delivery adds value to the concert-goer. Hologram for hologram sake is boring, just like any new emerging technology. Find the right narrative and then find the right technology to help you deliver what you want to say.

ABOUT THE AUTHOR

Juliana Koranteng is the founder/editor-in-chief of **MediaTainment Finance (MTF)**, the business journal that covers investments in the international media, entertainment and creative sectors. As an international correspondent or editor, Koranteng's works have appeared in Billboard magazine, TIME magazine, the Hollywood Reporter, Advertising Age, the Washington Post, The Economist, UK and US national newspapers and the daily magazines published by Boutique Editions at the annual MIPTV, MIPCOM and Cannes Lions events in Cannes. She's also the author of several books and reports. She conceived, developed and sold New Media Age, the UK's leading digital-marketing publication, to Centaur Media, and has given speeches at international events and been interviewed by Forbes, the BBC, CNN and Bloomberg. MediaTainment Finance and sister title TechMutiny are published by JayKay Media Inc, the London-based media group that also includes a media consultancy and photography-design among its activities.

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