

China's Innovative Business Models



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Talking Points

Transforming the Music Industry with Next-Gen Services to Unlock New Monetization Avenues

- ★ **China's Growth Momentum**
- ★ **Connected Devices (IoT)**
- ★ **Micro-sync**
- ★ **IP Protection**
- ★ **AI-training**



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China's Growth Momentum

Embracing the Transformative Growth and Diversification of the Chinese Music Industry

- ★ **\$21.76bn Market Size, 16.8% YoY**
- ★ **800k musicians, 30 or under**
- ★ **850m online listeners, 80% of netizen population**
- ★ **Advancements in IP Protection**



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Connected Devices (IoT)

Chinese Technology's Escalating Global Presence and Its Importance for Rightsholders

- ★ **Smart Speakers**
- ★ **Smart TVs**
- ★ **Connected Cars**
- ★ **+ more**



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Connected Devices (IoT)

Chinese Technology's Escalating Global Presence and Its Importance for Rightsholders

	China's Top Players	Est. Market Size by 2030	China's % of Global Market
Smart Speakers	Baidu, Alibaba, Xiaomi	\$50 bn	30%
Smart TVs	TCL, HiSense, Xiaomi, Realme, Skyworth	\$489 bn	28%
Connected Cars	BYD, Geely, Dongfeng, Chang'an, Chery, Nio	\$1,579 bn	60%



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Micro-sync Distribution

Insights from TME's Revenue from Streaming Hitting More Than 50% for the First Time

- ★ **Video Editing**
- ★ **Stock Media**
- ★ **Niche Services**
- ★ **+ more**



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Micro-sync Distribution

Exploring the Dynamic Landscape of a Wide Range of Channels for Micro-sync Distribution

	China's Top Players	64 DSPs
Video Editing	VivaVideo, StoryCut, Duitang, VideoShow, Ying Yin, Tong Hua, CapCut, Wondershare, Filmora, FilmoraGo, Filmstock	17
Stock Media	Visual China, 58pic, 588ku, CoolVox, Ooopic, Gaopin Images, Gaoding Design, ISHEJI, ZCOOL HelloRF, New Studios	17
Niche Services	Le Fit, YESOUL, Daily Yoga, Keep, SUPERMONKEY, Duo Deer, Hidooro, New Oriental Kids +, Baby tree, Nanjing Haibang	11
Productivity/Cloud	Kingsoft WPS, Ding Talk, WinAll, Rabbit Show, Alibaba Cloud, Agora, ZegoCloud	7
Other	KilaKila, XIRON, Taewah, LinknLink, Qi E Hao, Dian Yin, Baizhishan Technology, Air China, Aobai	12



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Micro-sync Distribution

A Success Story of Embracing a Monetization Strategy Beyond Streaming

- ★ **EDM record label, operations in China**
- ★ **\$1m in streaming, \$413k in non-streaming (41%)**
 - \$290,000 Pico/Douyin
 - \$84,000 Keep
 - \$14,000 Supermonkey
 - \$25,000 ClearView*



IP Protection

Navigating Legal Complexities through Comprehensive Music Identification in Video and Enforcement

- ★ **'Content ID'-like System**
- ★ **Online Shows and Programs**
- ★ **Wide Range of DSPs**



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IP Protection

Navigating Legal Complexities through Comprehensive Music Identification in Video and Enforcement

- ★ Start/End Time
- ★ YouTube URL
- ★ Metadata
- ★ + more



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AI-training

China Recognizes AI-generated Content as Subject to Copyright Protection

★ Li vs Liu, Beijing, November 2023

- Intellectual Investment Recognition
- Far-Reaching Implications for AI Industry
- Contrast with International Stance
- Supportive Regulations for AI



AI-training

China Recognizes AI-generated Content as Subject to Copyright Protection

- ★ **Strategic Legal Positioning**
- ★ **Monetizing Data Usage**
- ★ **Enhanced Music Discovery**
- ★ **Cultivating Artistic Diversity in AI**



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Thank You!

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