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Global Music & Metrics: A Data-Driven Overview of the Asian Music Industry

All That Matters
2023

Introduction



Helena Kosinski
VP, Global

LUMINATE

Agenda



- Who is Luminate?
- How big is music streaming across Asia?
- Language trends and the growth in Japanese language music
- Case Study: How Anime Helped Yoasobi's "Aidoru" Go Global

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**Who is
Luminate?**

Luminate

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



Consumption



**Consumer
Insights**



**Global
Intelligence**



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

Global, Regional & Country Level Insights

Expanded Intelligence in 2023

North America

- U.S.
- Canada

Latin America

- Argentina
- Brazil
- Bolivia
- Colombia
- Chile
- Ecuador
- Mexico
- Peru

Middle East, Turkey & Africa

- Egypt
- Saudi Arabia
- UAE
- South Africa
- Turkey

Nordics

- Denmark
- Finland
- Sweden
- Norway
- Iceland

Western Europe

- Austria
- Belgium
- France
- Germany
- Ireland
- Italy
- Luxembourg
- Netherlands
- Portugal
- Spain
- Switzerland
- U.K.

Eastern Europe

- Croatia
- Czechia
- Poland

South East Asia

- Indonesia
- Malaysia
- Philippines
- Singapore
- Thailand
- Vietnam

Australasia

- Australia
- New Zealand

East Asia

- Japan
- Republic of Korea
- Taiwan
- Hong Kong

South Asia

- India

We Answer These Types of Questions

Following Insights: Consumption and Audience Intelligence



How am I doing vs. competitor X or Y?



How are others doing (country, song, artist)?



Who is my audience/others' audience — now and what are they looking for?



Where should I invest? What is impact of my investment?



How can I tell my artist story to brands/live venues?

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What Data Are We Sharing Today?

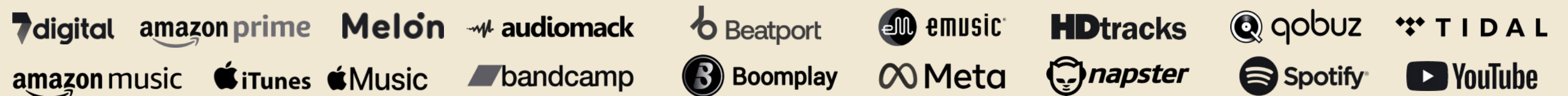
Country Level Streaming and Digital Sales

- Country Level Consumption for 47 markets, including all key Asian markets — Japan, Republic of Korea, Philippines, Indonesia, Malaysia, Thailand, Vietnam, Hong Kong, Singapore, Taiwan and India

Research Suite: More Audience Insights

- Audience Insights into 30 countries including: Japan, Republic of Korea, Philippines, Indonesia, Malaysia, Thailand, Vietnam, and Singapore

Geographies: Data Providers



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**How Big Is
Music Streaming
Across Asia?**

Global Metrics

2022+ 2023+

1H 2023 Compared To 1H 2022

Total On-Demand Song Streams (Audio + Video)



+30.8% Vol. Change

Total On-Demand Audio Song Streams



+22.9% Vol. Change

+ 12/30/22-6/29/23 (AS COMPARED TO 12/31/21-6/30/22)
* SEA (STREAM-EQUIVALENT ALBUMS): 1250 PREMIUM STREAMS = ONE ALBUM // 3750 AD-SUPPORTED STREAMS = ONE ALBUM; TEA (TRACK-EQUIVALENT ALBUMS): 10 DIGITAL TRACKS = ONE ALBUM
** CATALOG = 18 MONTHS OR OLDER AND HAVE FALLEN BELOW NO. 100 ON THE BILLBOARD 200 CHART AND DON'T HAVE A SINGLE FROM THE ALBUM THAT IS CURRENT ON ANY OF BILLBOARD'S RADIO AIRPLAY CHARTS
ON-DEMAND VIDEO SONG STREAMING INCLUDES OFFICIAL, SONG UGC AND NON-SONG UGC



Audio + Video Streaming - Asia

1H 2023 vs 1H 2022

400.3B

31 Dec 2021 - 30 Jun 2022
(Weeks 1-26)

830.4B

30 Dec 2022 - 29 Jun 2023
(Weeks 1-26)

+107.4%

Change Percentage

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Top 3 Countries: Year-Over-Year Growth

Total On-Demand Audio + Video Streaming

India

444.7B

1H 2023 Total OD, compared with 192.5B in 1H 2022

+131%

1H '23 vs 1H '22

Republic of Korea

26.5B

1H 2023 Total OD, compared with 12.7B in 1H 2022

+109%

1H '23 vs 1H '22

Indonesia

105B

1H 2023 Total OD, compared with 49.4B in 1H 2022

+112.5%

1H '23 vs 1H '22



Which Generations Drive Streaming?

Younger listeners are driving audio streaming adoption

88%

of **Millennial Filipino**
music listeners are
music streamers

69%

of **Millennial music**
listeners in **Singapore**
are music streamers

68%

of **Gen Z music**
listeners in **Japan** are
music streamers

#1 Source of Music Discovery

How music listeners find new content



Social
Media

74%

In the Philippines



Video/Audio
Streaming

42%

In Singapore



Television

51%

In Japan

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Language Trends &
the Growth in Japanese
Language Music

Trends in Language

Share of Japanese language content in Top 10k tracks is increasing this year across Asia while English language share is decreasing

Global

	YTD 2023 (Week 26)	Change over FY '22
English	56.40%	-5.70%
Spanish	10.60%	-1.20%
Hindi	8.70%	2.60%
Korean	3.10%	-0.10%
Portuguese	1.60%	0.00%
Japanese	1.80%	0.50%

Biggest Decline: English
Biggest Gainer: Hindi

Korea

	YTD 2023 (Week 26)	Change over FY '22
Korean	53.30%	-4.70%
English	27.90%	0.10%
Japanese	7.30%	4.20%
Spanish	0.50%	0.00%
Chinese, Mandarin	0.40%	0.20%

Biggest Decline: Korean
Biggest Gainer: Japanese

Japan

	YTD 2023 (Week 26)	Change over FY '22
Japanese	66.10%	-0.10%
English	14.90%	-0.20%
Korean	9.70%	-1.80%
Spanish	0.30%	0.10%
Chinese, Mandarin	0.20%	0.10%

Biggest Decline: Korean
Biggest Gainer: Spanish / Chinese, Mandarin

Indonesia

	YTD 2023 (Week 26)	Change over FY '22
English	39.10%	-4.80%
Indonesian	25.70%	-2.80%
Korean	6.00%	-1.40%
Japanese	1.40%	0.50%
Mandarin	0.30%	-0.30%

Biggest Decline: English
Biggest Gainer: Japanese

Philippines

	YTD 2023 (Week 26)	Change over FY '22
English	65.80%	-5.00%
Tagalog	13.40%	-0.80%
Korean	6.40%	-1.30%
Japanese	1.40%	0.80%
Italian	0.20%	-0.10%

Biggest Decline: English **Biggest Gainer:** Japanese



Engaging with Foreign Content

Percentage of Listeners Engaging with Music Content from Other Countries

95%

of **Filipino music listeners** engage with foreign content

74%

of **Singapore music listeners** engage with foreign content

57%

of **Japanese music listeners** engage with foreign content



Who is the Young Japanese Music fan?

Snapshot: The Gen Z Music Listener in Japan

Music Discovery

44% discover music on video and/or audio streaming services

Music Consumption

68% consume music via video streaming platforms

Music & Social Media

+138% more likely to listen to music that their friends have posted than the average Japanese social media user

Engaging with Foreign Content

-27% less likely to listen to music by artists from other countries than the average Japanese music listener

Top Japanese Songs in the Asia Region and Select Countries

Based on Total On-Demand (Audio + Video) streaming through Week 26 2023

Overall Asia

Song	Artist	YTD '23 Streams
Aidoru	Yoasobi	967.18m
Kawaikute Gomen	Honeyworks	922.64m
Kick Back	Kenshi Yonezu	615.03m
Surges	Orangestar	44.90m
Senkou	Alexandros	342.15m

Singapore

Song	Artist	YTD '23 Streams
Shinunoga E-Wa	Fujii Kaze	4.1m
Aidoru	Yoasobi	3.6m
Kick Back	Kenshi Yonezu	2.3m
Night Dancer	Imase	2.3m
Kawaikute Gomen	Honeyworks	2.1m

Japan

Song	Artist	YTD '23 Streams
Aidoru	Yoasobi	720.48m
Kawaikute Gomen	Honeyworks	545.31m
Surges	Orangestar	437.34m
Senkou	Alexandros	337.93m
Subtitle	Official HIGE DANdism	300.61m

Philippines

Song	Artist	YTD '23 Streams
Kick Back	Kenshi Yonezu	45.2m
Kawaikute Gomen	Honeyworks	33.7m
Night Dancer	Imase	20.2m
Aidoru	Yoasobi	15.8m
Mayonaka No Door/Stay With Me	Miki Matsubara	9.7m

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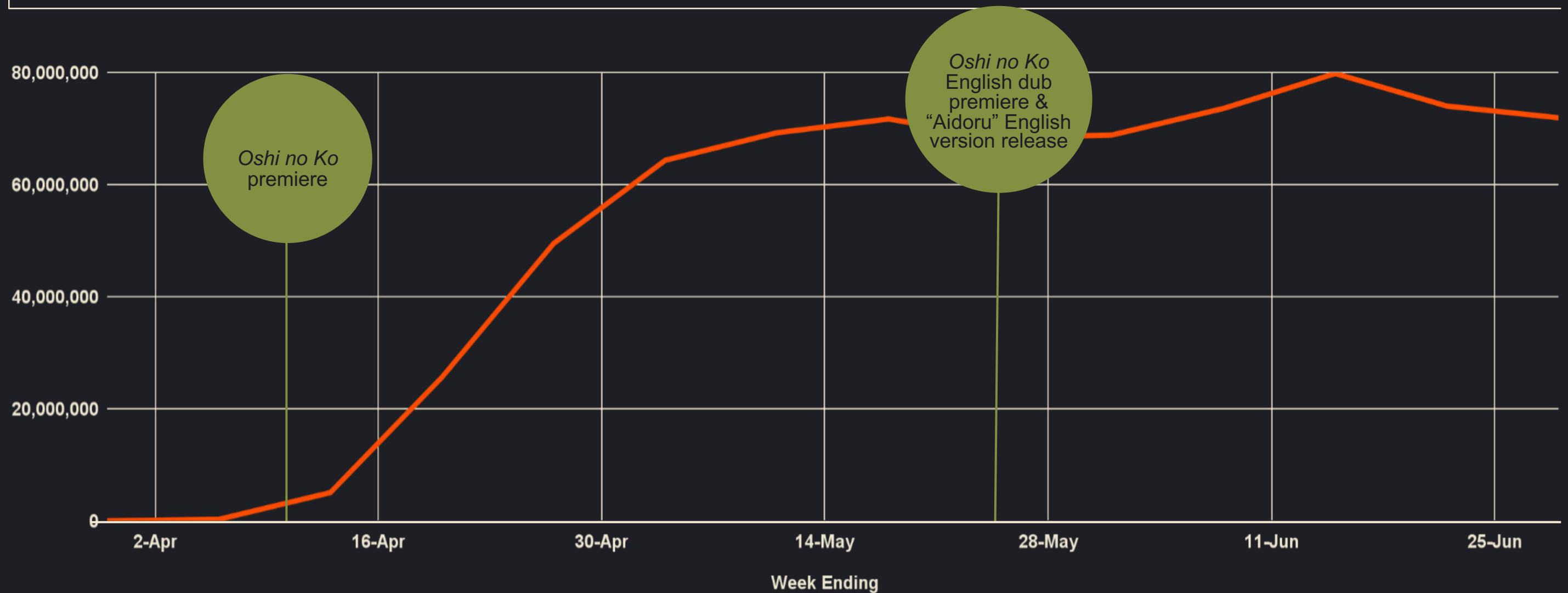


How Anime Helped Yoasobi's “Aidoru” Go Global



Case Study: Yoasobi “Aidoru”

Japan Total On-Demand Audio + Video streaming

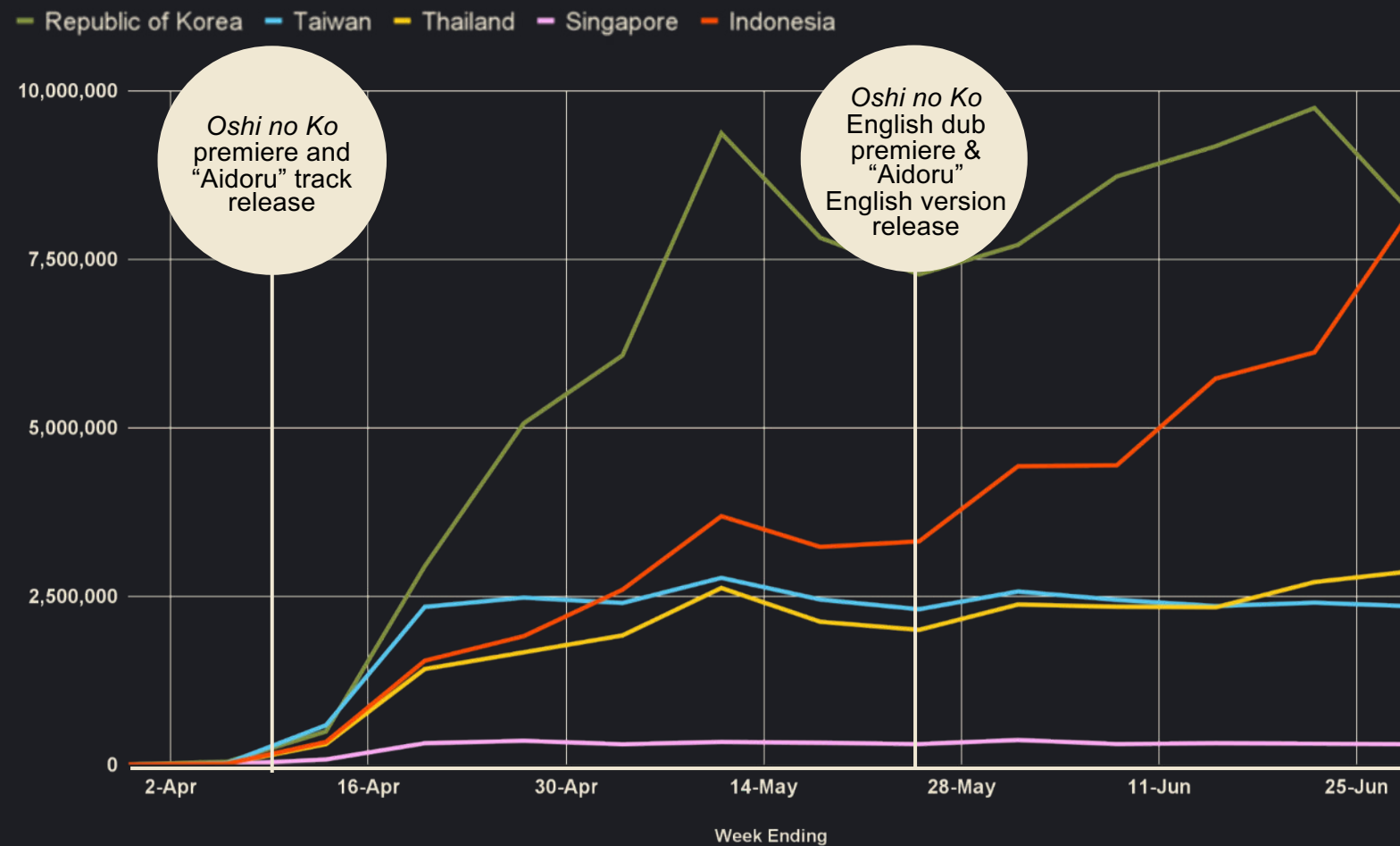




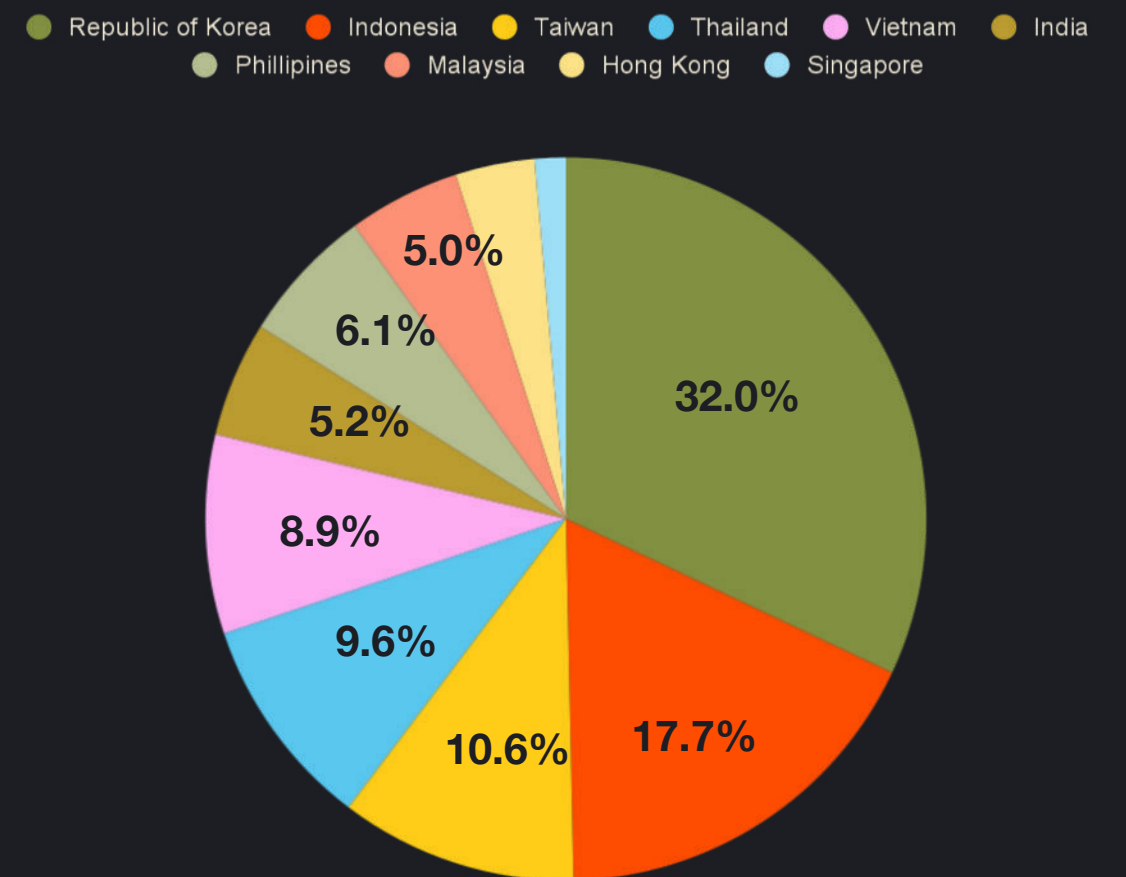
Case Study: Yoasobi “Aidoru”

Outside of Japan, the first listeners were in Japan’s neighboring countries (Republic of Korea and Taiwan) before the track starting gaining velocity in Indonesia and launching to other key territories.

Yoasobi “Aidoru” Streaming in Asian Countries Excl. Japan
Total On-Demand Streaming (Audio + Video)



Asian Country Share Excl. Japan
Total On-Demand Streaming (Audio + Video)



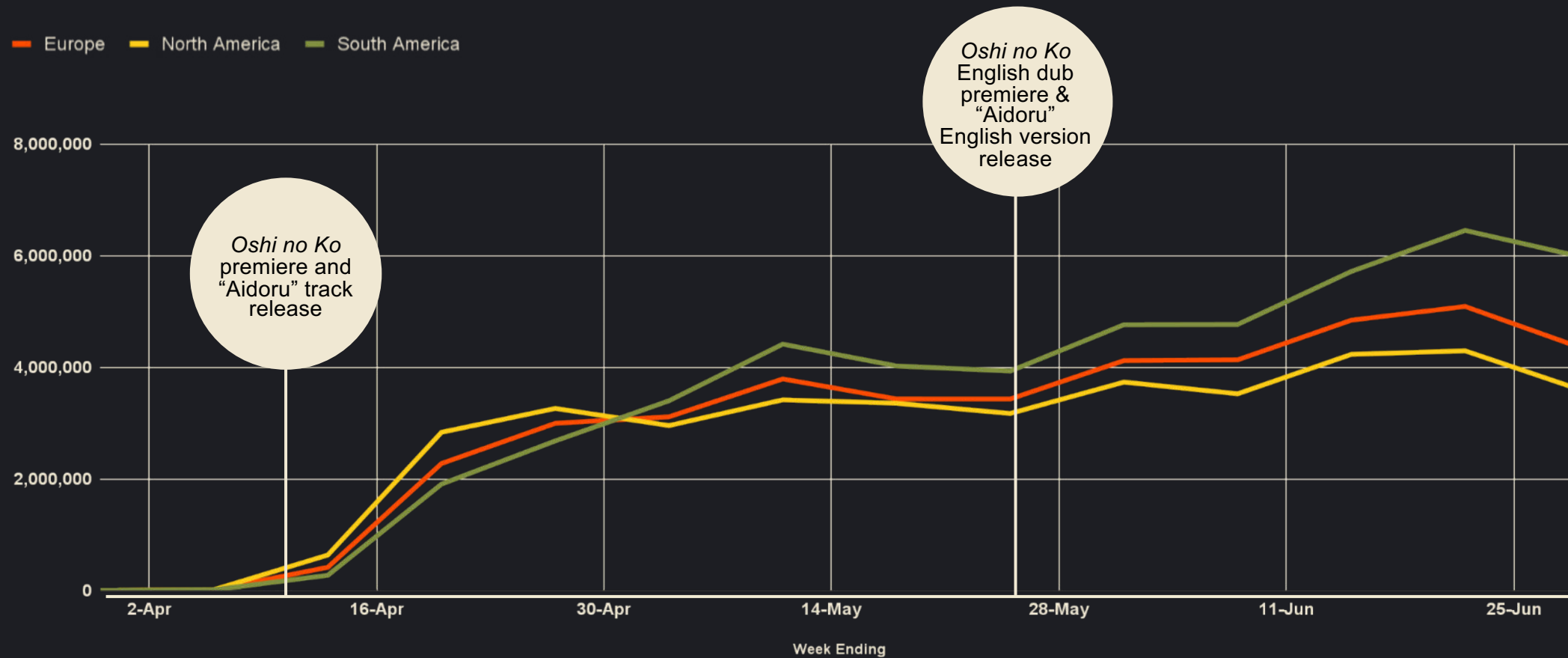


Case Study: Yoasobi “Aidoru”

The track gained significant traction in North America, Europe and South America with noticeable increases the weeks ending April 20, April 27, May 11, June 1 and June 15.

Yoasobi Continent View Excl. Asia Total On-Demand Streaming (Audio + Video)

— Europe — North America — South America



Top Ex-Asian Countries Through 29/6/23	Total On-Demand Streams (Audio + Video)
United States	33.3m
Mexico	13.1m
Brazil	12.4m
France	6.7m
Argentina	6.0m

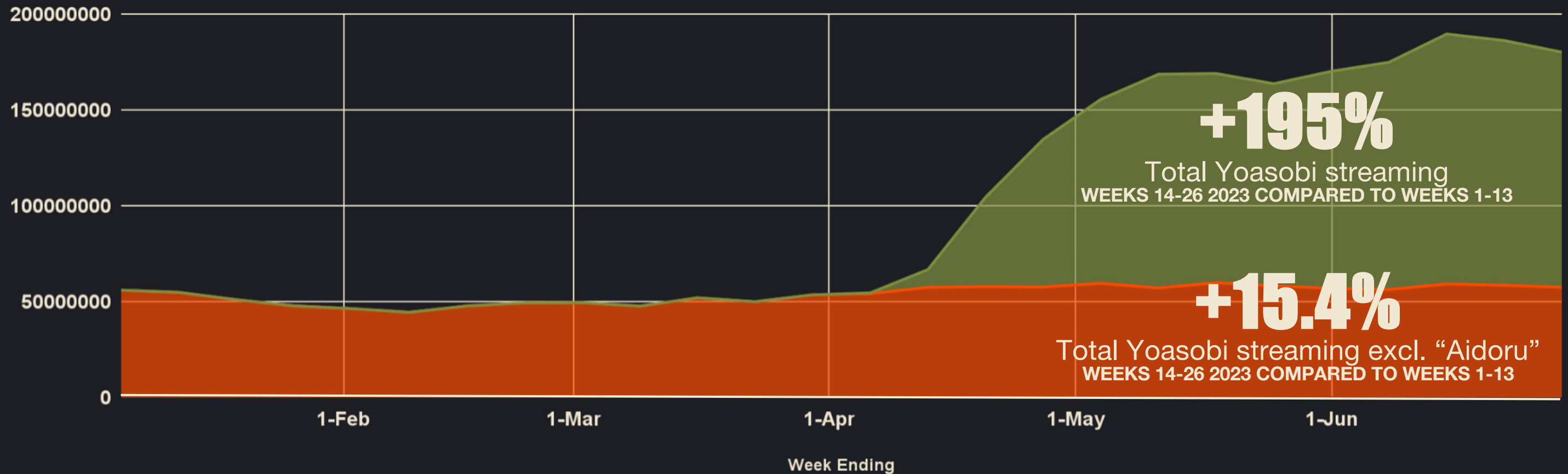


Case Study: Yoasobi “Aidoru”

Total On-Demand Audio and Video Streams
30 December 2022 - 29 June 2023

Yoasobi Total Global On-Demand Streaming (Audio + Video) 1H 2023

Aidoru Global TOD Yoasobi Global excl. Aidoru TOD





Music Discovery through Anime in Key Countries

Generations that discover music through Anime are also most likely to be high streamers of music

39%

Of Millennial music listeners in **Japan** discover music through Anime

31%

Of Gen Z music listeners in **Indonesia** discover music through Anime

22%

Of Gen Z music listeners in **The Republic of Korea** discover music through Anime

18%

Of Gen Z music listeners in the **U.S.** discover music through Anime

Three Things to Remember

Total streaming in the Asian region more than doubled year-on-year

Younger listeners are driving streaming growth

Songs in Japanese are gaining streaming share

English language share has dropped as part of a larger recent Global trend

Entertainment partnerships can help power songs to Global listenership

Music discovery via synch can help songs cross borders and reach new listeners

Q&A



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Want to learn more about streaming and audience in Asia, U.S., Europe or elsewhere? Contact us:

hkosinski@luminatedata.com

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