
EMEE

EUROPEAN
MUSIC
EXPORTERS
EXCHANGE

EMEE
Japan music
market study

EMEE, 2024

This report is created as one of the deliverables of the project “Developing European Music Export Capacity”. The project is co-funded by the European Commission.



Co-funded by
the European Union

Author: **Takayuki Suzuki**

Co-author (interviews and in-focus sections) **Alice Kattago**

Research project coordinator: **Virgo Sillamaa**, EMEE

Designer: **Erkin Antov**

The report was created in November to December 2023; and April - June 2024.

The author and the entire EMEE team expresses gratitude to all the professionals who were willing to share their insights: Ann Slangar (Sugar House Publishing), Duane Levi (Shalestone Music), Haruo Mita (Superboy), Iori Ono (Blue Note Japan), Jochem Tromp (Soepermarkt Music Management), John Willame (Smallfish Agency), Julio Quintas (artist manager of Marco Mezquida), Mirta Arizola (Vegas PR), Mizuki Kimura (JASRAC), Natalia Emi Chloe Hirai, Seiya Matsumiya (Black Cat White Cat Music), Shota Wakanabe (Beatink), Tetsu Ohno and Tetsuro Nishikawa (Disk Union), Yohji Takagi (Core Port), Yoshi Warashina (Fuji Pacific), Yoko Nozaki (The Music Plant), Yui Mugino.

Special thanks go also to Marine De Bruyn, Tamara Kamińska and Marta Karsz for organising the meetings during the EMEE fact finding mission to Tokyo, Japan in March 2024.

EMEE foreword

Developing European Music Export Capacity

European musical talent and entrepreneurial spirit have demonstrated global competitiveness, however, European music markets and sectors remain fragmented.¹ Thus many European artists, creators, professionals and music companies, especially from smaller countries or from less developed music ecosystems, face significant hurdles in realising their full international potential.² To address these obstacles, music export organisations (MEOs) have been set up in most European countries. These MEOs provide services and support to the sector, helping to develop their international networks, career, and business opportunities.

In 2018, the majority of European MEOs formed a network called the European Music Exporters Exchange, or EMEE for short, with the mission to learn from each other and coordinate resources and actions to increase opportunities for European talent and entrepreneurs on a global level. Today, EMEE is a non-profit association made up of 33 national and regional music export organisations from 28 countries, with its registered office based in Brussels.

In 2019, the European Music Export Strategy was outlined in a study commissioned by the European Commission,³ providing a 6-step path for developing music export capacity on a European level, and a “toolbox” of actionable proposals to implement the strategy. In subsequent years and through several projects and pilots, EMEE has developed a comprehensive and strategic approach to international market entry with consecutive steps including conducting market studies, fact-finding, prospecting, and trade missions. These activities aimed to develop a thorough understanding of the target markets and establish relevant networks.

This present study is based on desk research by Takayuki Suzuki in November-December 2023, an EMEE fact finding mission to Tokyo in March 2024 and video interviews in May and June 2024. The main text of the report reflects mostly data and information of 2022 as by the time it was concluded 2023 reports were not yet out.

About the author

Takayuki Suzuki, MusicTech
Japan, Managing Director

Takayuki is Managing Director of MusicTech Japan initiative where innovation meets across Japan and Global. From his longtime career as MusicTech consultant based in Tokyo, he has extensive knowledge, experience and network across Japan, US, EU and China. He holds various roles in the global music tech ecosystem such as advisory board of SXSW Pitch, Japanese Society for Rights of Authors, Composers and Publishers (JASRAC), and Wallifornia Music Tech. His career has included roles as Head of Mobile at MTV Japan and most recently Head of Digital Business Development for Universal Music Japan.

1 European Commission, Directorate-General for Education, Youth, Sport and Culture, Smidt, P., Sadki, C., Winkel, D. et al., Music moves Europe – A European music export strategy: final report, Publications Office, 2020, <https://data.europa.eu/doi/10.2766/40788>.

2 *Ibid.*

3 The study can be found here: <https://op.europa.eu/en/publication-detail/-/publication/d7de0905-68c5-11ea-b735-01aa75ed71a1>.

Table of Contents

Introduction – How to best work with Japan as a European music exporter	6
1. General national context	7
1.1. Social and economic context description	7
1.2. Political and administrative context	7
1.3. Geography, climate and demography	7
1.4. Internet infrastructure and use	8
1.5. Tax and legal	8
2. Music consumption	10
2.1. How people discover and engage with music	10
2.2. Participation in live events	10
2.3. Listening to recorded music	10
2.4. Other ways people engage with music	12
3. Music ecosystem – an institutional overview	13
3.1. Music industry professional events and conventions	13
3.2. Music industry trade bodies/unions	13
3.3. Collective management organisations	14
3.4. Other cultural organisations	14
4. Live music sector	15
4.1. Live music industry in figures	15
4.2. Music festivals	15
4.3. Music venues and clubs	16
4.4. Promoters and booking agents	17
4.5. Organising a tour in Japan	17
In focus: Performing and Touring in Japan as a European Artist	18

5. Recorded music sector	20
5.1. Recorded music industry in figures	20
5.2. Main actors in the recorded music industry	21
5.3. Digital distribution	21
5.4. Physical distribution	22
5.5. Collective management of neighbouring rights	22
5.6. Releasing and distributing your music in Japan	22
In focus: Releasing Music in Japan	24
6. Music publishing sector	26
6.1. Music publishing industry in figures	26
6.2. Main actors in the music publishing industry	26
6.3. Collective management of copyright	27
6.4. Distributing your catalogue and creative collaborations in Japan	27
In focus: Working With the Japanese Market as a Publisher	28
6.5. A brief overview of the synch sector	29
In Focus: Writing for Synch in Japan	30
7. Media and PR	31
7.1. Social media	31
7.2. Written media – print and online	31
7.3. Radio	32
7.4. Television	32
7.5. Developing a PR strategy for Japan	33
8. Music scene snapshots	34
In focus: European Artists in the Japanese Jazz Scene	35
9. Music technology and innovation	36
References	37

Introduction

How to best work with Japan as a European music exporter

Japan, the world's third-largest economy, is renowned for its technological innovation and strong industrial base. Despite challenges like population decline and urbanisation, it boasts gradual economic growth and a high standard of living. Major cities like Tokyo and Osaka are cultural centres, supported by efficient transportation, including the Shinkansen, and generally high safety standards, albeit with natural hazards.

The musical relationship between Europe and Japan has a long history, with many artists performing live, hitting the charts, and sometimes breaking first in Japan, a phenomenon known as "Big in Japan." This reflects Japan's interest and respect for European acts.

Japan's climate is diverse, impacting activities and events. Positioned at the forefront of advanced internet infrastructure and 5G technology, Japan facilitates digital music consumption and a wide range of online services. Despite the prevailing physical CD market, understanding Japan's creative marketing methods is crucial. Digital music consumption, especially streaming, has gained popularity post-pandemic, particularly among the youth, with market share increasing. Apple Music leads in paid services in terms of the number of paid users, but YouTube dominates the music services in terms of overall music consumption, with 64% according to [RIAJ](#), including having the highest rates of music video and live performance consumption. Similarly, TikTok has surged in popularity, especially among the youth, with dance videos becoming a key driver in music engagement.

Television remains a significant source for new music, with TV shows and commercials being crucial for European acts aiming for success in Japan. The live entertainment

market, the world's second-largest, offers numerous concerts throughout the year. Domestic players dominate this sector, though international promoters like Live Nation and AEG have a presence. Relationship building with Japanese promoters is crucial for European acts.

Ticketing is mostly online and operated by digital tickets that makes concert and music festival participation more accessible across the country. Venues in major cities like Tokyo and Osaka are popular for both domestic and international acts. Japan's high standards for efficiency of transportation and operation make it a great location for tours and the fanbase are travelling to major venues to see international artists.

However, it's important to note that the share of international/European acts in Japan's recording and live entertainment market has diminished. To break through, understanding the Japanese music market and collaborating with local artists is essential. Foreign companies face a detailed tax and legal environment, requiring adaptation to corporate and consumption taxes, strict transfer pricing regulations, and robust intellectual property protection. Visa requirements for foreign workers and artists are stringent, necessitating a thorough understanding of Japan's regulatory framework or collaboration with reliable local partners.

Language barriers are significant, with few industry professionals speaking English outside of those regularly working with European acts. While some are conservative and slow in communication as a characteristic Japanese person of business. Time zone difference is also a critical factor in doing business with Japan, where not adjusting to the time difference can often waste a day.

1. General national context

A table view:

Society			
	2022	Change	Source
Population	124 278 000	-0,53%	UN
Average age	48,7	0,006%	UN
Official language(s)	Japanese		
Other important language(s)	none		
Recommended language to communicate with local professionals	English		
Economy			
	2022	Change	Source
Currency	Japanese Yen(JPY, ¥)		
Currency exchange rate with € (past three years average)	EUR1 = 139,7755		
GDP (million current US\$ - 2021, annual %, const. 2015 prices)	5 082 466	0,7%	UN
GDP per capita(million current US\$ - 2021, annual %, const. 2015 prices)	40 063,5	1,1%	UN
Communication			
	2022	Change	Source
Smartphone in use (% of population)	92,6%	3,3%	DATAPORTAL
Internet penetration in households (% of population)	48,7	0,006%	DATAPORTAL

1.1. Social and economic context description

Japan is the third-largest economy in the world, renowned for its technological innovation and strong industrial base. Prior to the pandemic, Japan displayed a steady economic performance with moderate growth, and in 2022, it showed a positive growth trend with a 1.03% increase in GDP. While grappling with a declining population and an ageing society, Japan maintains a high standard of living with one of the world's highest life expectancies of 84.91 years in 2022 ([UN](#)). The country faces challenges such as a negative population growth rate (-0.4% in 2022) and a high rate of urbanisation (92% in 2022). Despite these challenges, Japan's economy is characterised by a low unemployment rate (2.6% in 2022, [World Bank](#)), a high level of technological integration with over [77% smartphone penetration](#) for personal use, and a significant internet usage rate ([84% in early 2022](#)). Furthermore, Japan is known for its commitment to quality and innovation, making it a key player in the global economy.

1.2. Political and administrative context

Japan, as a unitary parliamentary constitutional monarchy, has the Emperor as a ceremonial figure and the Prime Minister as the government head. The dominant Liberal Democratic Party reflects the nation's political stability. Japan's focus includes economic stability, technological innovation, and security, especially given regional dynamics. Cultural policies prioritise heritage preservation and modern cultural expressions, supported by the [Agency for Cultural Affairs](#). International cultural exchange is vital, with Embassies playing a crucial role in promoting cultural diplomacy and enhancing Japan's soft power. Despite challenges like an ageing population and regional security issues, Japan maintains active diplomacy and international cooperation. The government's commitment to cultural preservation alongside promoting modern expressions and international exchange underscores its approach to balancing tradition with global engagement.

1.3. Geography, climate and demography



Figure 1. Map of Japanese states

Source: Japanmap360.com <https://japanmap360.com/japan-region-map>

Japan's geography profoundly shapes its cultural hubs, population distribution, and transportation infrastructure, making it a unique landscape for music and events. The country's major urban centres, including Tokyo, Osaka,

and Nagoya, are not just densely populated but also serve as the primary hubs for music and culture. These cities, along with others like Sapporo and Fukuoka, host a plethora of live music venues, concert halls, and festivals, attracting both local and international acts.

Transportation in Japan is renowned for its efficiency and coverage, with the Shinkansen (bullet trains) being a symbol of speed and convenience, connecting major cities across the country. For example, the journey from Tokyo to Osaka can be completed in as little as 2.5 hours. The cost of Shinkansen tickets varies depending on distance and class; a one-way trip from Tokyo to Osaka can range from ¥14 000 (€87) to ¥20 000 (€124). Other local and regional trains, as well as buses and domestic flights, offer a range of options catering to different budgets and preferences.

Security in Japan is generally of a high standard, with low crime rates making it one of the safest countries in the world. However, travellers should be aware of natural hazards such as earthquakes and typhoons, which can occasionally disrupt travel and necessitate careful planning.

The climate in Japan varies from North to South, influencing both daily life and seasonal activities. The northern island of Hokkaido experiences cold, snowy winters, making it a popular destination for winter sports, while the southern islands like Okinawa enjoy a subtropical climate, ideal for year-round outdoor activities. The central and most populous parts of Japan have four distinct seasons, with the mild springs known for cherry blossom viewings and autumns for colourful foliage, both popular times for outdoor events and festivals. However, the rainy season in early summer and typhoon season from late summer to early autumn can impact travel and outdoor activities, making it essential for event planners and visitors to consider the timing of their activities. Despite these seasonal considerations, Japan's well-prepared infrastructure and public safety measures ensure that access and transportation remain reliable year-round.

1.4. Internet infrastructure and use

Japan boasts advanced internet infrastructure, with widespread high-speed broadband (93.26Mbps) and mobile internet (40.89Mbps), ensuring efficient access to web services, crucial for music consumption. The country is at the forefront of 5G technology, enhancing speed and connectivity. For locals, data costs are relatively high but reflect the quality of service, with various telco options offering competitive packages. International visitors can easily access these networks via short-term SIM cards or eSIM (approx ¥5,000⁴ (€31), available at airports and convenience stores, providing convenient and fast internet access. The robust telco ecosystem in Japan supports a tech-savvy population, facilitating streaming and digital music consumption, making

it an ideal environment for both residents and visitors to engage with a wide array of online content and services.⁵

1.5. Tax and legal

Foreign companies entering Japan encounter a detailed tax and legal environment. They're subject to corporate tax, generally around 30%, and a 10% consumption tax on goods and services. Income from dividends, royalties, and interest may attract withholding tax, influenced by tax treaties. Strict transfer pricing rules⁶ aim to prevent tax avoidance. Legally, companies can enter as a representative office, subsidiary, or joint venture, each with distinct implications. They must adhere to Japanese commercial, antitrust, labour, and industry-specific laws. Intellectual property protection is robust, necessitating registration and protection under local laws. Data handling must comply with the Personal Information Protection Act, particularly for those managing personal data.

Visa requirements for foreign workers are stringent, with companies needing to sponsor the correct visas based on work type and duration. Beyond these formalities, understanding Japan's business culture is crucial — from communication and etiquette to negotiation styles. This nuanced landscape ensures that while Japan offers substantial opportunities, it demands careful navigation of its structured regulatory framework. Companies are advised to seek local expertise in legal and tax matters to ensure full compliance and to leverage the potential of the Japanese market effectively. With the right approach, foreign businesses can thrive in this environment, characterised by its high regard for order, precision, and respect.

More info on Japanese business culture:
[Business Culture | EU-Japan](#).

1.5.1. Artist status and business identity management, such as what kind of legal entity professionals, including freelancers, are using.

In Japan, the status and business identity management for artists, including freelancers, often involve establishing themselves as sole proprietors or, less commonly, incorporating as a company, depending on their scale and scope of activities. Sole proprietorship is the most straightforward option for individual artists and freelancers, allowing them to manage their business under their name. However, for tax purposes or when seeking more significant business opportunities, some may opt to form a Kabushiki Gaisha (corporation) or a Godo Gaisha (LLC).

⁴ For example: <https://www.mobal.com/japan-sim-card/?t=st&/>.

⁵ Kemp, S. (2022). Datareportal. DIGITAL 2022: JAPAN. <https://datareportal.com/reports/digital-2022-japan>

⁶ Transfer pricing is an accounting practice that represents the price that one division in a company charges another division for goods and services provided, which can reduce the overall tax burden of the parent company. Seth, S. (2024). Transfer Pricing: What It Is and How It Works, With Examples. Investopedia. Available online: <https://www.investopedia.com/terms/t/transfer-pricing.asp>.

1.5.2. Copyright law and collective licensing (a general overview).

Copyright law in Japan is quite robust, offering protection for artists and creators for 70 years after their death, ensuring that their works are not used without permission or proper compensation. Japan also has a system of collective licensing, where organisations like the Japanese Society for Rights of Authors, Composers, and Publishers (JASRAC) manage the rights and distribute royalties for music and other creative works. This system allows for more straightforward management and collection of royalties for artists.

1.5.3. Visa and other mobility info

As for visas and mobility, foreign artists wishing to work or perform in Japan typically need to obtain an appropriate visa. The type of visa can vary based on the length and nature of the stay, ranging from short-term entertainment visas for specific performances to longer-term cultural activities visas for those engaging in more extended artistic endeavours. Understanding and navigating the visa requirements is crucial for foreign artists and professionals planning to work in Japan's creative industry.

Which licences are granted collectively by the CMOs vs negotiated individually

Usage	Author's rights	Neighbouring Rights
Public performance	Yes	No
Broadcasting in radio and TV	Yes	Yes
Reproduction and distribution (physical)	Yes	Yes
Background music	Yes	No
Making available online	Yes	No
Licensing to film production	Yes	No
Licensing to TV production	Yes	Yes
Licensing to advertisements	Yes	No
Licensing to video games production	Yes	No
Private events	Yes	Yes

More information on copyright in Japan (in English):

[Copyright | AGENCY FOR CULTURAL AFFAIRS](#)

2. Music consumption

2.1. How people discover and engage with music

In 2022, Japan recorded 32,338 live performances with over 48 million attendees, surpassing pre-COVID-19 numbers, yet the market hasn't fully recovered, showing gradual increases in attendance at concert halls and live houses.⁷ Performances were predominantly held in halls and live houses/clubs, with a small percentage online and outdoors. The average ticket price was ¥8,246 (€48,6), primarily sold online, with key players like PIA and Lawson Entertainment heavily involved due to their convenience store affiliations.

Music consumption habits show a diverse landscape, with YouTube being the predominant platform across all age groups. TikTok's popularity surged, especially among teens and those in their 20s. While there's a noted preference for no particular music type among many, older males tend to prefer physical CDs, indicating generational differences.

Streaming services are increasingly popular, with Prime Music leading the market share, followed by Spotify and Apple Music. However, preferences among paid subscribers vary, with Apple and YouTube leading, reflecting the evolving nature of music streaming in Japan. TV programs, YouTube, and television commercials are significant sources for music and related information, with official artist websites and word-of-mouth also playing crucial roles.

Karaoke remains a popular pastime, with millions participating and significant market value. The industry is crucial for music promotion, with artists engaging in cooperative marketing with karaoke establishments.

Fan engagement is vital in Japan's music industry, particularly through fan clubs offering exclusive benefits and content. These clubs have transitioned to digital platforms, with white-label platforms enhancing their management. Large management companies sometimes develop their proprietary platforms, emphasising the importance of artists in the industry. This modern approach to fan clubs fosters a strong community and direct artist-fan connections, highlighting the enduring significance of artists in the music business.

2.2. Participation in live events

In 2022, the total number of live performances in Japan was 32 338, with a total attendance of 48 315 553 people. While this exceeded the figures from 2019 before the COVID-19 pandemic, the overall market has not fully recovered nationwide. The attendance numbers at concert halls and live houses have been increasing gradually, indicating that the impact of the pandemic is still ongoing.

When it comes to attending music events and concerts/festivals, the utilisation rates are notably high among females aged 12-19 and those in their 20s, hovering around 25%.⁸

The share of performances by venue size is as follows: 0,7% in stadiums, 6,1% in arenas, 43,7% in halls, 40% in live houses/clubs, 1% outdoors, 0,9% online, and 7,5% in other venues (see section 4.3. for more information on venue types).

The average ticket price was 8246 yen (ACPC). In terms of ticket purchase methods, 59,8% were made online, 41,3% through physical stores and convenience stores, and 7,9% via phone.⁹

Key players in ticket sales include PIA, Lawson Entertainment, e+ (eplus), and Community Network, among others.

The reason for the prevalence of physical stores and convenience stores lies in the fact that companies like PIA and Lawson Entertainment have received investments from convenience store chains or are subsidiaries of such chains. They promote in-store ticket sales and offer services like picking up tickets purchased online at convenience stores, encouraging customers to visit these locations.¹⁰

2.3. Listening to recorded music

Music consumption habits in Japan exhibit a diverse landscape across various age groups. The standout platform for music consumption is YouTube, which boasts a dominant usage rate of over 50% among all age demographics. Notably, the 12-19 age group and those in their 20s, both male and female, exhibit particularly high usage rates, nearly reaching 70%.¹¹

7 This whole chapter draws on: ACPC (2023). Live Market Research / Number of performances, attendance and market size of downloadable live performances. Annual Basic Research Report 2022. Available online: https://www.acpc.or.jp/marketing/kiso_detail.php?year=2022.

8 RIAJ (2022). Music Media User Survey 2022. Available online: <https://www.riaj.or.jp/f/report/mediauser/2022.html>.

9 MUFG (2019). Survey results regarding the use of online ticket services. Available online: https://www.caa.go.jp/policies/policy/consumer_policy/policy_coordination/internet_committee/pdf/internet_committee_190313_0003.pdf.

10 ACPC. (2023). Live Market Research.

11 All the data in this chapter is based on: RIAJ (2022). Music Media User Survey 2022; and ICT (2022). Survey on subscription music streaming service usage trends in 2022. Available online: <https://ict.co.jp/report/20221111.html/>.

Number of music streaming service users to reach 27.7 million by the end of 2022. 24.2% are paid users and 22% use free tier. The rise of “TikTok” in 2021 has been remarkable, particularly among teenagers and individuals in their 20s. This platform has gained significant traction compared to other age groups. Among females aged 12-19, the usage rate stands at an impressive 36.3%, while for females in their 20s, it remains high at 23.8%. Male teenagers aged 12-19 also exhibit a notable usage rate of 20%.

Streaming services have been on the rise, with younger age groups showing increased adoption. Paid streaming services, in particular, have gained popularity, with usage rates nearing 30% among both male and female users in their 20s.

Regarding music consumption preferences, a significant portion, 50.7% of respondents, indicated having “no particular preferences.” However, it’s noteworthy that males in their 40s and 50s exhibit a relatively stronger preference for physical CDs, indicating a generational difference in music listening habits.

The market share among DSP users in Japan reflects a dynamic landscape. Prime Music, with a substantial 12.5% share, claims the top spot. This service, available

at an affordable rate of ¥600 (€3.7) per month and ¥5 900 (€36.6) annually exclusively to Amazon Prime members, offers access to a collection of 2 million songs and simultaneous access to Prime Video services, making it a popular choice among consumers.

Following closely behind, Spotify holds a 10.9% share, while Apple Music commands 9.3%. YouTube Music and Amazon Music Unlimited secure 7.4% and 6.7% respectively. LINE MUSIC, with its 5.7% share, adds to the diversity of choices in the market.

What’s particularly striking is Amazon’s dominance, with Amazon Music Unlimited providing access to a staggering library of over 90 million songs. When combined with Prime Music, Amazon’s market share surges, eclipsing the competition. (ICT)

However, it’s essential to note that rankings based on paid subscribers paint a somewhat different picture. In this category, Apple takes the lead, followed by YouTube, LINE MUSIC, Amazon, and Spotify, suggesting that the preferences of paying subscribers may differ from those of overall users. This diversity reflects the evolving landscape of music streaming in Japan.

%	Male						Female					
	12-19	20s	30s	40s	50s	60s	12-19	20s	30s	40s	50s	60s
CD	15.3	19	20.8	27.9	27.4	29.2	30.3	24.6	25.8	24.2	26.9	24.3
Audio files ripped from CD	15.6	16.4	29.5	24.7	24.5	24.7	22.3	21.4	17.4	19.5	21.4	17
Music DVD, Blu-ray	9.3	12.1	12.5	15.9	14.9	12	20.7	21.3	16.6	12.4	14.2	11.9
DSP(Download)	7.9	12.9	15.9	11.2	9.1	5.3	8.6	17.5	11.7	7.8	5.1	8.4
DCP(Streaming)	33.7	38.4	32.7	25.5	28	22.9	36.7	46.4	28.2	16.1	20.5	14.1
DSP(Paid Streaming)	21.7	29.9	23.1	11.2	9.6	8.1	25.7	28.8	17.3	7.7	6.8	4.7
Amazon Prime Music	16.4	15.1	16.3	16	22.9	18.4	12.9	22.2	14	8.8	16	10.1
TikTok	20	10.3	7.2	3.5	5.2	2.5	36.3	23.8	6.3	2.8	3	1.2
Other Social media	8.8	2.8	4.4	3.4	0.8	-	14.7	8.4	3.7	1.9	0.9	-
YouTube	71.9	65.6	68.7	59.9	60	62.3	75.2	72.9	62.3	63.7	53.4	56.9
Other video streaming	18.1	18.6	13.8	12.3	7.4	10.8	14.3	13.2	9.6	6.2	8.7	6.8
Free streaming *Includes piracy	16.4	10.9	14.6	10.3	12.5	13.3	16.3	13.5	8.8	11.1	7.6	3.2
Video streaming	9.4	12.9	13.2	5.2	5.7	6.3	6	8.6	4.2	5	8.2	3
Radio	9.4	12.4	14.9	24.7	27.8	33.2	9.8	11.5	16.2	18.5	20.3	27.6
TV	15.5	25.3	19.9	21.6	28.3	29.2	25.8	20.3	19.5	27.7	28	37.9
Internet TV	8.7	6.9	6.7	6	2	6.8	3.4	6.7	2.4	0.5	5	2.9
Karaoke	14.9	12.4	10.4	9.1	4.2	2.4	21.7	14.7	7.2	6.6	8	3.2
Music events	5	8.9	4.8	4.3	3.7	2.3	10.8	11.6	4.7	3.5	4	2.1
Concert/Festival	13.1	14.5	11.7	12.1	10.4	7.9	28.5	24.8	21.1	14.2	17.9	17.4
Online live	7.1	7.8	7.6	9.1	4	2.5	17.6	15.2	4.3	6.1	7.1	5.7
Other	2.7	1.4	4.5	2.6	5.8	5.5	4.2	1.7	6.2	4.5	5.2	4

Table 1. The preferences by music consumption ways
Source: “Music Media User Survey 2022” by RIAJ

2.4. Other ways people engage with music

Karaoke is not only a beloved national pastime in Japan but also a crucial venue for enjoying music and discovering new artists and songs. In 2022, there were 32.4 million people who enjoyed karaoke in Japan, making it a substantial market with a size of 387.9 billion yen.

Japan boasts a total of 8,138 karaoke establishments, equipped with 111 200 singing booths. Each booth is equipped with karaoke equipment, and even bars and Japanese-style pubs often feature karaoke setups. Across Japan, more than 132 000 karaoke machines are in operation, providing ample opportunities for singing enthusiasts to enjoy themselves.¹²

The songs sung at karaoke establishments serve as a barometer for hits, making marketing strategies within the karaoke industry highly significant. Japanese music artists actively engage in cooperative marketing efforts with karaoke businesses to promote their songs.

Furthermore, there are numerous TV programs centred around karaoke, such as the long-running popular show “Karaoke Battle,” which has been airing for approximately 20 years. These programs exemplify the importance of karaoke in Japanese society and culture.

Engagement with fan bases plays a vital role in the promotion and business aspects of Japan’s music industry. What sets this engagement apart is the unique and dynamic concept of fan clubs.

Fan clubs offer an avenue for fans to connect with their favourite artists on a deeper level. By becoming a member, fans gain access to an array of exclusive benefits and services. These perks often include the privilege of securing concert tickets before the general public,

exclusive content such as behind-the-scenes footage or unreleased tracks, and eligibility to participate in fan club-exclusive events and meet-and-greets. The annual membership fees typically amount to around ¥5 000 (€31), making it an accessible option for dedicated fans.

In the past, fan clubs would regularly send physical pamphlets and newsletters to their members. However, with the widespread use of smartphones and the internet, many fan clubs have transitioned to digital platforms. These digital fan clubs are commonly operated through dedicated websites or mobile apps, providing a convenient and real-time connection between artists and their fan base.

To streamline operations and enhance efficiency, many fan clubs choose to utilise white-label platforms. These platforms, such as m-up, SKIYAKI, and fanplus, offer comprehensive solutions for managing fan clubs. They not only facilitate the distribution of exclusive content but also handle membership management, ticketing, and event coordination. This approach ensures a seamless experience for both artists and fans.

In some cases, large management companies that represent multiple artists and actors have taken it a step further by developing their proprietary fan club platforms. This strategic move underscores the pivotal role that artists play in shaping the music business landscape.

In essence, fan clubs and their innovative engagement strategies have become integral components of Japan’s music industry. They foster a sense of community among fans and provide artists with a direct channel to connect with their most dedicated followers. The adoption of white-label platforms has modernised the fan club experience, making it more accessible, efficient, and interactive, while also highlighting the enduring significance of artists in the music business.

¹² All-Japan Karaoke Industrialist Association. Website. Available online: <https://www.karaoke.or.jp/05hakusyo/2023/p5.php>.

3. Music ecosystem – an institutional overview

3.1. Music industry professional events and conventions

In Japan, the music business conference landscape has historically been relatively limited, with Tokyo International Music Market (TIMM) being the sole conference of note before the onset of the COVID-19 pandemic. However, the evolving digital transformation of music consumption and marketing in Japan, accelerated by the pandemic, has created a growing demand for knowledge and insights into digital distribution and promotion strategies.

As a response to this changing landscape, there has been a rapid increase in the number of conferences and online seminars organised by entities like **MusicAlly** and the **International Music Coalition Japan** (IMCJ). These conferences and seminars have become valuable platforms for learning about digital distribution, promotional techniques, and case studies relevant to the modern music industry.

Tokyo International Music Market (TIMM) by Japan Music Culture Export, is Japan's premier music event designed to promote Japanese music on a global scale and facilitate international exchange within the ever-evolving music industry hosted in Oct. At the heart of TIMM are three main components: the Marketplace/Business Matching, where international music industry professionals gather to discuss business and foster collaborations; Business Seminars, covering the latest industry topics and trends; and the Live Music Showcase, offering Japanese artists a platform to display their talents to both international music industry professionals and global music enthusiasts. Additionally, TIMM features a Kick-off Party exclusively for international buyers and exhibitors, providing a casual setting for networking and relationship building over drinks and meals.

www.timmjp.com/en

MusicAlly Digital Summit 2023 was the inaugural IRL conference by MusicAlly Japan in Tokyo Apr, a well-known music industry-focused publication and consultancy firm, focusing on “Beyond Subscription Strategies,” a crucial topic for the success of Japan's music industry. The summit featured sessions and panel discussions with executives focusing on strategic planning, organisational transformation, and talent development, as well as practitioners in the fields of artist business and music marketing.

MusicAlly hosts various conferences and seminars in Japan.

<https://maj-summit2023.peatix.com/?lang=ja>

Asia Pacific Music Summit 2023 hosted by IMCJ, aims to gather music business leaders, entrepreneurs, and change-makers from all corners of the region to engage in meaningful and practical discussions on the main challenges facing the rapidly changing regional music ecosystem, as well as innovative and equitable solutions that could forge unprecedented cross-border cooperation hosted in Tokyo Oct.

<https://imcj.or.jp/news/1046/>

3.2. Music industry trade bodies/unions

Japan's music industry ecosystem is well-developed, with organisations representing key stakeholders working together with the government and among other organisations to contribute to the further development and growth of creators and the music industry.

RIAJ, the Recording Industry Association of Japan, was founded in 1942 to represent the Japanese music recording industry. It plays a significant role in the development and expansion of Japanese music culture. RIAJ's activities include promoting recordings and new demand, enhancing copyright and neighbouring rights protection, ensuring proper use of recordings, conducting surveys, and publishing materials about the recording industry. As a designated society of the Agency for Cultural Affairs, RIAJ is responsible for collecting and distributing secondary use fees of commercial recordings from broadcasters, and remuneration from CD rental shops.

MPAJ, the Music Publishers Association of Japan, formally known as Nihon Ongaku Shuppansha Kyokai, was established in September 1973 with the goal of promoting the sound development and harmonious coordination of music publishing businesses, both domestically and internationally, thereby contributing to the proliferation and development of musical works. Recognized as a corporate entity by the Ministry of Education, Culture, Sports, Science and Technology in 1980, MPA transitioned to a general incorporated association in October 2010. It is the sole representative organisation for the music publishing industry in Japan, encompassing about 350 music publishing companies, many of which are also record producers.

ACPC, the All Japan Concert & Live Entertainment Promoters Conference, is a general incorporated association of promoters primarily involved in live music and entertainment across Japan. Established in 1990 as the “Corporation National Concert Tour Business Association”, ACPC was founded to establish an industrial base for concert

promoters and contribute to the healthy development of the music industry. The organisation, which transitioned to its current form in 2011, focuses on various public projects to further advance the live entertainment industry.

FMPJ, the Federation of Music Producers Japan, is an industry association composed of Japanese entertainment agencies. Founded in 1986, it consists of 229 music production companies as of June 2019. FMPJ's main activities include protecting and promoting the rights of music producers and performers. This includes the distribution of royalties for lending commercial records, secondary use fees for commercial records broadcasting, private recording and video compensation, as well as advocating for publicity rights. In 2010, it transitioned to a general incorporated association and changed its name from Ongaku Seisakusha Renmei to Nihon Ongaku Seisakusha Renmei (FMPJ), focusing on resolving issues related to neighbouring rights and enhancing the status of music production.

JAME, the Japan Association of Music Enterprises, formed in 1963, is the largest industry association in Japan's entertainment and music sectors, comprising various Japanese talent agencies. It was established with the primary objectives of preventing inter-agency disputes due to talent poaching, establishing rights such as copyright and publicity rights, and improving the employment environment for talents. JAME's activities include conducting research and studies on music businesses and related industries, holding training sessions and seminars, and other related activities. The first chairman of JAME was Yasuhiro Nakasone, a member of the Liberal Democratic Party and a member of the House of Representatives at the time.

IMCJ, the Independent Music Coalition Japan, is a non-profit organisation formed by a collaboration of independent record business entities, including the Independent Records and Musicians Association (IRMA), Independent Label Council Japan (ILCJ), and Japan Net Creators Association (JNCA), as well as other associated organisations and businesses. Established to address the challenges and opportunities of the evolving music business environment, especially in the global market, IMCJ focuses on service infrastructure development to enhance Japan's music content distribution globally.

3.3. Collective management organisations

JASRAC, short for the Japanese Society for Rights of Authors, Composers, and Publishers, was established in 1939. It operates as the sole authorised collective management organisation in Japan for managing copyright in music. JASRAC administers the rights of authors, composers, arrangers, and publishers, primarily focusing on performance rights and mechanical rights in music. It plays a crucial role in collecting and distributing royalties for the public use of music, ensuring that rights holders are compensated for their work. JASRAC's activities are essential for the protection and management of music copyrights in Japan.

NexTone Inc., established in 2000 and re-established in 2016 as a joint venture between e-License Inc. and Japan Rights Clearance Inc., is dedicated to providing solutions for rights holders in the realm of copyright management and licensing. It focuses on flexible and transparent operations, ensuring equitable royalty distribution. NexTone emphasises fair and competitive rates to accommodate the evolving needs of rights holders in the digital age, along with offering increased promotional opportunities.

CPRA, the Center for Performers' Rights Administration, was established in 1993 with the primary objective of collectively managing performers' neighbouring rights in Japan. In 2012, this became the core focus of the operations of Geidankyo, the overarching organisation. CPRA, through its Executive Committee and Rights Holder Members Committee, ensures a fair and efficient operating structure. As authorised by the Commissioner of the Agency for Cultural Affairs, CPRA is responsible for collecting fees for secondary use and rental remuneration of commercial phonograms on behalf of performers. It also plays a key role in authorising the exploitation of performances, including the secondary use of broadcasting programs, and handles the collection and distribution of payments, as well as the distribution of performers' compensation for private recordings.

3.4. Other cultural organisations

For cultural organisations/institutions, the British Council, Goethe Institute are active in Japan as well. Depends on year by year but music export missions have been active by countries such as the UK, France, Canada, Netherlands, Sweden and South Korea.

South Korea's **Korea Creative Content Agency (KOCCA)** is a multifaceted South Korean government agency, playing a vital role in the nation's cultural sector. Affiliated with the Ministry of Culture, Sports, and Tourism, KOCCA is charged with overseeing and coordinating the promotion of the Korean content industry, encompassing a wide array of responsibilities and support mechanisms. They host various music/culture export programs and events in Japan such as KOREA SPOTLIGHT showcase in Oct. 2023.

Centre National de la Musique (CNM) in France conducted a collaboration project with FMPJ in 2023. This project involves matching artists selected by CNM with artists affiliated with FMPJ to collaboratively create music releases. The mission of this project is to serve as a gateway for French artists to enter the Japanese market by leveraging mutual recognition among their respective fan bases.

4. Live music sector

4.1. Live music industry in figures

In 2022, the total number of live performances in Japan was 32 338, with a total attendance of 48 315 553 people. While this exceeded the figures from 2019 before the COVID-19 pandemic, the overall market has not fully recovered nationwide. The attendance numbers at concert halls and live houses have been increasing gradually, indicating that the impact of the pandemic is still ongoing.

	2019	2021	2022	2023 1st Half
Live performances	31 889	26 383	32 338	16 375
Revenue (EUR)	2 349 388 397	981 196 967	2 554 055 705	1 468 278 706
Numbers of participants	49 545 050	22 841 143	48 315 553	27 352 563

Table 2. Live music industry figures 2019-2023 1st half. Source: ACPC.

On the other hand, though the market is dominated by domestic artists, we see a recovery of international artists in the 1st half of 2023, accounting for 8,03% (2022) to 16,6%

(2023 1st half) of the total number of participants and 0,38% (2022) to 2,11% (2023 1st half) for European artists based on better situation visa, transportation restriction, etc. By genre, Rock/Pop accounted for 77,8% of the performances by overseas artists, while Jazz/Fusion (Crossover) 0,6% and Classic accounted for 0,5%. Performing Arts, which includes musicals, ballet, opera, etc., accounted for 12,3%.¹³

4.2. Music festivals

In Japan, there are “suburban” festivals held in mountainous areas and “urban” festivals held in multi-purpose facilities like convention centres and arenas. In 2023, 486 small to medium-sized festivals featuring multiple artists were held in halls.¹⁴ Large-scale festivals include the internationally renowned “urban” festival SUMMER SONIC and the “suburban” Fuji Rock Festival, both featuring international artists. Other large festivals like Rock In Japan Festival primarily feature domestic artists. Festivals with many foreign artists often specialise in genres and remain popular, with those featuring Metal or Electronic Music having a strong following.

Name	Location	Capacity	Notable European Acts	Website
Fuji Rock Festival	Niigata Prefecture	Up to 100 000	Radiohead (UK), Sigur Rós (Iceland), Muse (UK), Björk (Iceland), Slowdive (UK), FKJ (FR), ROMY (UK), ASGEIR (Iceland)	www.fujirockfestival.com
SUMMER SONIC	Tokyo & Osaka	Around 200 000	The 1975 (UK), MÅNESKIN (Italy), Arctic Monkeys (UK), Zedd (Germany), Pale Waves(UK), FKJ (FR)	www.summersonic.com
SONICMANIA	Tokyo	Around 20 000	James Blake (UK), Mura Masa (UK), Autechre (UK), Shygirl (UK), Dorisburg (Sweden), Dorian Concept (Austria)	www.summersonic.com
Ultra Japan	Tokyo	Up to 40 000	David Guetta (France), Martin Garrix (NL), Carl Cox (UK), Hardwell (NL), Boyz Noize (DE)	ultrajapan.com/ja
Greenroom Festival	Yokohama	Around 15 000	Sigrid (Norway), Mamas Gun (UK), Tom Misch (UK)	greenroom.jp
Asagiri Jam	Shizuoka	Around 20 000	Kitty, Daisy & Lewis (UK), Alfie Templeman (UK), Bohemian Betyars (Hungary), The Inspector Cluzo (FR), Sigur Rós (Iceland), Mogwai (Scotland), Hothouse Flowers (Ireland)	asagirijam.jp
Loud Park	Tokyo	Around 30 000	Kreator (DE), Nightwish (Finland), Stratovarius (Finland), Carcass (UK), Amaranthe (Sweden)	www.loudpark.com
NEX FEST	Tokyo	Around 15 000	Curated by Bring Me The Horizon (UK), Yungblud (UK)	nxfestjapan.com
Metamorphose	Shizuoka	Around 20 000	Darren Emerson (UK), Dorian Concept (Austria), JAZZANOVA (DE), Mano Le Tough (Ireland)	www.metamo.info
Rainbow Disco Club	Shizuoka	Around 5 000	Alex Kassian (DE), Ben UFO (UK), Lars Bartkuhn (DE), San Proper (NL), Antal (NL)	www.rainbowdiscoclub.com

Table 2. Notable festivals featuring international artists.

¹³ ACPC (2023). Live Market Research / Number of performances, attendance and market size of downloadable live performances. List of Annual Basic Survey Reports. Available online: <https://www.acpc.or.jp/marketing/kiso.php>.

¹⁴ Festival Life. Website: <https://www.festival-life.com/festival>.

4.3. Music venues and clubs

Venues in Japan are distinguished by various names based on their scale. “Live house” are primarily standing venues with a capacity of up to about 900 people. “Hall” refers to venues with a capacity of 2 000 to 5 000 people, often with seating but sometimes all-standing. “Arena” are multipurpose venues used for sports and other events, accommodating 10 000 to 20 000 people. “Dome”, with a capacity of 30 000

to 50 000, is used for baseball and other large-scale events. Additionally, clubs hosting electronic and dance music events are well-established, particularly in urban areas.

There are 9690 music and related venues. The breakdown by capacity is as follows: 3745 venues with a capacity of 1-200, 1477 venues with a capacity of 201-400, 1577 venues with a capacity of 401-1 000, and 1058 venues with a capacity of 1001 or more.

Below is a list of venues relevant to international/European acts in Japan.

Name	Location	Capacity	Notable Features	Notable European Acts	Website
Blue Note Tokyo	Tokyo, Minato	280	Premier jazz club, international and local jazz artists	Nubya Garcia (UK), Gabi Hartmann (FR), Domi & JD Beck (FR), Yussef Dayes (UK)	www.bluenote.co.jp/jp
Club Metro	Kyoto	300	Dance and electronic music, unique atmosphere	Moritz von Oswald (DE), Squid (UK), Stefan Goldmann (DE)	www.metro.ne.jp
Billboard Live Tokyo	Tokyo	300	Intimate setting, hosts a range of international artists	Shabaka And The Ancestors (UK), Éric Serra (FR), Swing Out Sister (UK)	www.billboard-live.com/pg/shop/index.php?mode=top&shop=1
Billboard Live Osaka	Osaka	320	Intimate live music space, jazz, soul, and R&B	Nick Lowe (UK), Shakatak (UK), Howard Jones (UK)	www.billboard-live.com/pg/shop/index.php?mode=top&shop=2
Space ODD	Tokyo	350	Live house/Club in Daikanyama near Shibuya	Midnite City (UK), Miles Kane (UK), The Lounge Society (UK)	spaceodd.jp
UNIT	Tokyo, Daikanyama	500	Electronic and experimental music, underground vibe	NAPALM DEATH (UK), Margaret Dygas (DE), exlovers (UK)	www.unit-tokyo.com
Nagoya CLUB QUATTRO	Nagoya	550	Part of the Club Quattro chain, various music acts	Rage (DE), Primal Fear (DE), Gogo Penguin (UK)	www.club-quattro.com/nagoya/
Umeda Club Quattro	Osaka	650	Sister venue to Tokyo's Club Quattro, diverse music genres	Holly Humbertson (UK), The Japanese House (UK), Domi & JD Beck (FR)	www.club-quattro.com/umeda/
Shibuya CLUB QUATTRO	Tokyo, Shibuya	750	Iconic spot in Tokyo's vibrant Shibuya district, indie and rock acts	Katatonia (Sweden), Amorphis (Finland), Dizzy Mizz Lizzy (Denmark)	www.club-quattro.com/shibuya/
Ebisu Garden Hall	Tokyo	1 500	Music venue in Ebisu, foodie and cultural area next to Shibuya	Holly Humbertson (UK), Romy (from The XX, UK), Teenage Fanclub (UK)	gardenplace.jp/culture/hall.php
Suntory Hall	Tokyo	2 006	Acoustically renowned, classical music and symphonies	Víkingur Ólafsson (Iceland), Krystian Zimerman (Poland)	www.suntory.co.jp/suntoryhall/
Festival Hall	Osaka	2 700	Modern and elegant, a prominent classical music venue	NOEL GALLAGHER'S HIGH FLYING BIRDS (UK), José Plácido Domingo Embil KBE (Spain)	www.festivalhall.jp
TOYOSU PIT	Tokyo	3 100	Large, versatile space, often used for live concerts and events	Morrissey (UK), Bullet For My Valentine (UK), YUNGBLUD (UK)	toyosu.pia-pit.jp
Tokyo Garden Theater	Tokyo	8 000	New, modern venue for large-scale concerts and events	The Chemical Brothers (UK), Arctic Monkeys (UK), Måneskin (Italy)	www.shopping-sumitomo-rd.com/tokyo_garden_theater/

Table 3. A list of venues relevant to international/European acts in Japan.

4.4. Promoters and booking agents

There are 74 concert promoters in Japan that are members of the ACPC, an industry organisation. Other small and medium-sized concert promoters organise concerts and invite overseas artists on a daily basis.

Thirteen ACPC promoters who organise concerts and festivals for foreign artists in Japan have established the **International Promoters Alliance Japan (IPAJ)**, to help the country recover from the corona disaster by providing compensation for losses and establishing uniform guidelines to ensure the safety of events and concerts for overseas artists from the perspective of thorough quarantine.

UDO and Kyodo Tokyo have been inviting foreign artists to Japan since the 1960s, and made performances happen in Japan by big artists such as The Beatles and Bob Dylan.

In the 1990s, the next generation of promoters such as Smash and Creativeman were active, bringing artists of various genres to Japan and launching major festivals such as Fuji Rock and SUMMER SONIC.

In the 2010s, as part of its globalisation efforts, Live Nation became active in Japan, initially seeking to acquire Japanese concert promoters, but this was not an easy task due to the unique market conditions and the characteristics of a market with strong Japanese music. AEG Presents also announced a partnership with Avex to jointly manage their Japanese operations in 2021.

It means that it is very important for the Japanese live industry to work with domestic specialists, which is coupled with a culture that emphasises mutual trust.

4.5. Organising a tour in Japan

When an international artist conducts a tour in Japan, partnerships with promoters mentioned above are indispensable due to the language barrier with local venues and businesses, taxation, and contracts. It starts with pitching to them, but information from the booking agents they work with is also crucial, so you need to ask the booking agents you work with to pitch to promoters in Japan. Booking a venue or a concert hall is very competitive and in many cases bookings need to be done even up to a year or more in advance. If you contract with a promoter, they will handle budget management, schedule coordination, venue selection, artist approval, staff arrangements, and promotional publicity for the tour. The expenses will include venue costs, stage, sound, lighting, promotion, management, instrument rental, transportation, staff, etc. For travel, there are various patterns, such as moving with equipment by chartered service depending on the distance or artists travelling by domestic flights or bullet trains and arranging separate equipment vehicles. In any pattern, travel in Japan by public transport or car is very stable compared to other countries, and time prediction is relatively easy.

Name	Description	Notable artists work with	Website
Kyodo Tokyo	Originator of Japanese concert promoter who work with international act	Incubus (US), Caroline Polachek (US), BebeRexha (US)	www.kyodotokyo.com
UDO	The first concert promoter in Japan focused on the Rock genre.	Billy Joel (US), Boz Scaggs (US), Diana Krall (Canada)	udo.jp
Smash	Promoter of Fuji Rock Festival, Asagiri Jam and many international acts	Fairground Attraction (UK), MARCIN (Poland), INCOGNITO (UK)	www.smash-jpn.com
Creativeman	Promoter of SUMMER SONIC, LOUD PARK and many international acts	QUEEN (UK), DOMi & JD BECK (FR), HOLLY HUMBERSTONE (UK)	www.creativeman.co.jp
Office Ohsawa	Promoter who has own tastes curates Jazz/Crossover	Peter Hammill (UK), Wolfert Brederode (NL), Björn Meyer (Sweden)	bigstream.main.jp
THE MUSIC PLANT	Promote European traditional music and introduced over 300 CD titles and produced more than 100 tours in Japan.	Sväng (Finland), Flook (UK), Lúnasa (Ireland)	www.mplant.com/index.html

Table 4. Notable Japanese promoters who work with international artists.

In focus: Performing and Touring in Japan as a European Artist

This section is based on an interview with **John Willame**, owner of the creative music agency, Smallfish

[Smallfish Agency](#) is a creative agency based in the Netherlands, specialising in artist management. Their goal is to help artists develop long-term careers in alignment with their vision and philosophy. They operate in Europe and Asia, offering comprehensive management services from strategic planning to securing international gigs.

Background

John William has worked with six artists who have performed in Japan and collaborated with Warner Asia and various European artists, providing services such as finding gigs. Over the years, he's brought a few artists to Japan.

According to John, the Japanese market is the most challenging to enter in Asia. Success often requires local introductions, and there are specific protocols to meet locals and follow up with artists. The process is complicated and costly, and without international recognition, it's difficult for artists to succeed in Japan and to play in front of packed mid-sized venues, not just to a handful of people.

Experience with I Wear* Experiment

"When I started working with I Wear* Experiment, an Estonian electro-pop band with a female lead singer," John states, "I thought they had potential for Japan. I contacted many promoters in Tokyo and other parts of Japan and got direct contact with one venue. This venue gave us a chance to book a show and invited bookers and music influencers." The band performed, and a booker became interested, leading to an invitation to play 4-5 shows in different cities.

The rest of the tour involved small venues with minimal audiences, with the band bearing all costs, earning little per show. A later attempt with another promoter yielded similar results. Outside Tokyo, securing a support act is crucial, and promoters need to bring in the audience.

Challenges and Recommendations

Entering the Japanese market requires persistent promotion, substantial investment, and reliable local partners. "My recommendation is to go to Japan without high expectations and focus on building

Entering the Japanese market requires persistent promotion, substantial investment, and reliable local partners. "My recommendation is to go to Japan without high expectations and focus on building marketing

material" emphasises John. "I did this with one or two artists, creating content they could use back home." Artists should promote their music six months to a year before a tour and maintain a regular presence in Japan, meeting local creators and seeking partnerships with local acts.

The ideal entry point is through festivals, but competition is fierce. Showcases like TIMM, which also include the film and manga industries, can be a way in. Another indie-focused showcase run by an American can also be helpful. Other noteworthy showcases include [Music Lane Festival](#) (In Okinawa) and [Music Bridge Tokyo](#).

Content Creation and Local Partnerships

Content creation with local creators and collaborations with local acts can be effective strategies. For instance, John states "I brought I Wear* Experiment to Singapore for a showcase, where we met established Japanese bands." This led to cooperation, introducing the artists to a broader audience.

Local partners are essential, but finding the right ones can be challenging. It's best to secure agreements with well-established booking agencies (for example Fuji Rock), which are accustomed to working with foreigners. When working with PR companies, artists should stay in Japan for extended periods for promotional activities, including radio appearances, interviews, and media pushes.

Funding and Support

Securing funding is crucial due to the high costs incurred by performing in Japan. Many of the European artists John has worked with received funding from their governments in order to tour in Japan.

Touring and Performing Tips

John advises European artists seeking to enter and tour the Japanese market to first consider working with other Asian markets instead, such as South Korea, China, Indonesia, India, and more. These markets are typically more receptive with promoters, bookers, venues and festivals being eager to book European artists. The audiences attracted to shows in these countries can be large and also help artists boost their streaming and social media profiles. Once an artist has a solid base established in other Asian markets, then it's likely that Japanese bookers, festivals and venues will be more open to the artist performing there. John brings an example of an Italian DJ, who contacted him two years ago asking for help breaking into the Japanese market. John advised the artist to start working with other Asian markets instead, before tackling Japan. She toured

extensively in many Asian countries collaborating with artists from Indonesia, China, and Korea. “We prioritised other Asian markets before attempting Japan, ensuring she would play to full venues,” John emphasises.

Regular visits and sustained promotional efforts are necessary to maintain visibility and build a fanbase in all Asian markets, particularly in Japan.

Main Challenges

- Efficiently touring in Japan with an audience
- Building an audience before reaching Japan
- Finding reliable partners and PR companies
- Maintaining visibility with regular visits

Conclusion

Navigating the Japanese music market is complex and demands a significant investment of time and resources. Success relies heavily on strategic partnerships, consistent promotion, and leveraging broader Asian market opportunities. Artists must be prepared for the long haul, with realistic expectations and a robust support network to succeed in Japan.

Artists are advised to first work in other Asian markets such as South Korea, China or Indonesia, establishing an audience there. Bookers, venues and promoters in these countries are more open to European artists and the audiences are extremely receptive. Once an artist has toured in other Asian countries and established a solid audience there, then the artist will be more likely to be invited to perform at festivals and venues in Japan.

5. Recorded music sector

Physical CDs remain the primary medium for music consumption in Japan, not merely as a music medium but also because of the incentives that come with them. These incentives include meet-and-greets with artists, handshake events, and concert tickets. Furthermore, for boy bands and girl groups, the purchase motivation is often boosted by offering different jacket photos for each member, prompting fans to buy multiple CDs. Competing in sales rankings has become a goal for the fan base in some cases.

DVDs and Blu-rays also account for a significant portion of sales, with concert recordings selling for around 30-50 EUR each. These products are highly popular and constitute about 22% of total sales.¹⁵ Vinyl is a growing segment in Japan much as it is in other territories. Between 2021 to 2022, vinyl sales in Japan grew 12% and the share of international artists is higher than it is on CD, namely 34%.¹⁶

Streaming has been rapidly growing as well, with a 24.7% increase in 2022. Notably, streaming video surged by 59.9% from the previous year, and streaming subscriptions grew by 18.5%.

This is primarily due to the growth in subscribers to music streaming, with Apple Music as a market leader. The reasons for this include the increased prominence of streaming in music consumption during the COVID-19 pandemic, the continued release of catalogues from famous domestic artists, and the breakthrough of many digital-native artists, which has led to the widespread adoption of streaming for listening to music. YouTube has also become an indispensable platform for consuming music and artist-related content, and according to surveys by the Recording Industry Association of Japan (RIAJ), it is the most common method for listening to music.

A critical point to consider is the pricing. While domestic artist CDs are sold for about 20 EUR, the monthly fee for a streaming subscription is approximately ¥1 000 (€6,5). This pricing disparity is significant when compared to Western markets, where the cost of a single CD is closer to the monthly streaming fee. This difference is an essential factor to consider when analysing future market trends. As physical sales continue to hold significant value in Japan, understanding these dynamics is crucial for predicting the direction of the music industry.

When international artists distribute CDs in Japan, there are two types: the Japanese Edition and Import. The Japanese Edition CDs are produced and distributed with additional bonus tracks and Japanese commentary.

Although they are less common than before, they are still released for prominent artists, those with a fan base in Japan, or songs tied to commercials, as part of a strategy to appeal to a broad Japanese audience.

However, the market share of recording music by international artists in Japan has been continually declining. In 2013, Japanese music (domestic) accounted for 86% while international artists made up 14%. By 2022, the share for international acts had dropped to just 9%.

5.1. Recorded music industry in figures

In 2022, the total production of physical music products (audio records + music videos) amounted to 1465,3 million units, a decrease of 3% compared to the previous year in terms of quantity. However, in terms of value, it reached 1,287 billion EUR, which was a 4% increase compared to the previous year and marked the first time surpassing €1,27 billion EUR (¥200 billion) since 2019.

Music streaming revenue continued its growth trend, reaching €6,68 billion, a 17% increase compared to the previous year, and achieving its highest ever amount for the ninth consecutive year. As a result, the total production value of physical music products and the revenue from music streaming amounted to €307,4 billion, a 9% increase compared to the previous year, marking the first time exceeding €300 billion since 2018.

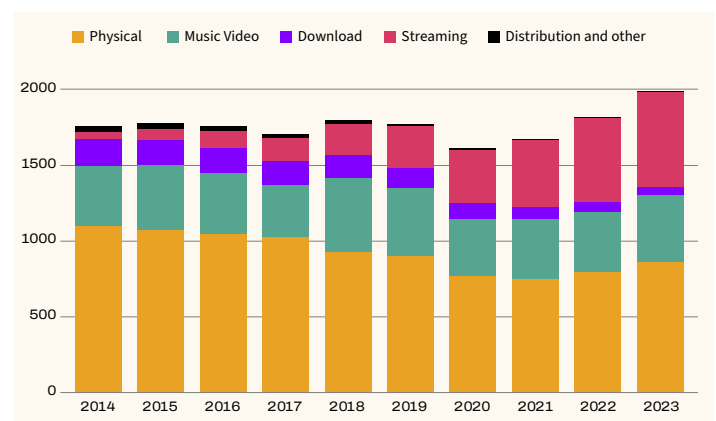


Figure 2. Revenue from recorded music (mln €), breakdown by format, 2014-2023. (RIAJ).¹⁷

15 RIAJ (2022). Trend of Recorded Music Production & Digital Music Sales (Value). Available online: https://www.riaj.or.jp/ff/e/data/annual/total_m.html.

16 RIAJ (2022). Audio: Vinyls. Available online: https://www.riaj.or.jp/ff/e/data/annual/ar_anlg.html.

17 RIAJ (2023). Production results and music distribution sales results for the past 10 years. Available online: https://www.riaj.or.jp/ff/data/annual/msdg_all.html.

	Physical		Music Video		Download		Streaming		Distribution and other		TOTAL
	Mln €	Share	Mln €	Share	Mln €	Share	Mln €	Share	Mln €	Share	Mln €
2014	1,100	62.59%	400	22.74%	175	9.97%	46	2.64%	36	2.07%	1,757
2015	1,077	60.55%	424	23.84%	170	9.55%	73	4.11%	35	1.95%	1,779
2016	1,048	59.52%	401	22.76%	162	9.20%	118	6.70%	32	1.82%	1,761
2017	1,026	60.09%	343	20.11%	160	9.36%	155	9.09%	23	1.35%	1,707
2018	930	51.71%	488	27.14%	151	8.41%	206	11.44%	23	1.30%	1,798
2019	901	50.97%	451	25.47%	132	7.49%	275	15.52%	10	0.55%	1,769
2020	766	47.63%	381	23.67%	106	6.57%	348	21.61%	8	0.52%	1,609
2021	755	45.20%	387	23.18%	83	4.99%	439	26.27%	6	0.37%	1,671
2022	796	43.88%	398	21.95%	68	3.72%	548	30.19%	5	0.25%	1,813
2023	863	43.37%	439	22.08%	60	3.03%	623	31.32%	4	0.20%	1,990

Table 5. Revenue from recorded music (mln €), breakdown by format, 2014-2023. (RIAJ).

5.2. Main actors in the recorded music industry

Japan's major record companies often originated as subsidiaries of electronics manufacturers, with companies like Toshiba, Sony, and Victor emerging from this trend. In Japan, "major" refers to the 18 companies that are members of the Recording Industry Association of Japan (RIAJ). However, the classification has evolved recently, distinguishing "Domestic Major Label" from "Global Major" for clarity in the international context, where the term "independent" is commonly used.

While there is no public information regarding each company's market share, the top contenders for the highest share each year typically include Sony Music Entertainment Japan (SMEJ), Universal Music Japan (UMJ), and Avex.

5.3. Digital distribution

For digital distribution in music consumption, Apple takes the lead, followed by YouTube, LINE MUSIC, Amazon, and Spotify, suggesting the preferences of paying subscribers.

The iPhone adoption rate in Japan is very high at 69,2%, which is contrary to global trends and has contributed to Apple Music's market share. Spotify, on the other hand, started its service in Japan after Apple Music because their Free Tier was avoided by Japanese music listeners. Additionally, Amazon has become a popular streaming service in Japan, partly due to its position as the number one player in terms of market share.

[LINE MUSIC](#) is a music streaming service of LINE, a Japanese messaging service like WhatsApp. They are popular at a young age because of aggressive discounts for students. Out of the global distributors, Believe and TuneCore distribute also to LINE MUSIC, but for example, Distrokid doesn't.

Name	Description	Artist released as Japan Edition recently	Website
Sony Music Japan	Music business arm in Sony Group who handle not only Recording music biz but also Anime, Media, talent management etc.	Bring Me The Horizon (UK), Måneskin (Italy), Declan McKenna (UK)	www.sonymusic.co.jp
Universal Music Japan	As a subsidiary of UMG, its main revenue comes from Japanese domestic artists. It also engages in management and retail business.	MIKA (UK, Lebanon), The Killers (US), Taylor Swift (US)	www.universal-music.co.jp
Avex Entertainment	Japanese entertainment conglomerate that specialises in music, film, television, and talent management. Founded in 1988,	Armin van Buuren (NL), ABOVE & BEYOND (UK), Marshmello (US)	avex.com/jp/en
Victor Entertainment	Victor is a part of JVC Kenwood specialising in music business in the group companies.	DragonForce (UK), Xavier Boyer (FR), SHAKATAK (UK)	www.jvcmusic.co.jp/pc
Warner Music Japan	As a subsidiary of WMG, its main revenue comes from Japanese domestic artists.	Prince (US), Whitesnake (UK), Green Day (US)	wmg.jp
Beatink	Independent label and promoter specialised for electronic music and other.	Partner with Warp, Brainfeeder, Ninja Tune and others.	www.beatink.com
Traffic	Independent label and distributor specialised for alternative music	CAN(DE), Telex(BE), JakoJako(DE) and other roster of MUTE(DE)	trafficjpn.com

Table 6. Main actors in the recorded music industry.

Among UGC services related to music in Japan, YouTube boasts the highest popularity with 71,2 million monthly active users (MAU). Instagram follows with 33 million users, Facebook with 26 million users, and TikTok with 9,5 million users. X (Twitter) is also quite popular in Japan, with 45 million users, but it has not yet entered into copyright licensing agreements.¹⁸

5.4. Physical distribution

In Japan, the significant sales of CDs, DVDs, and Blu-rays, compared to overseas, indicate the prevalence of physical retailers attracting a wide variety of customers. In recent years, there has been a rise in stores specialising in the merchandise and marketing of popular artists such as idols, girl groups, and boy bands, rather than those offering a broad range of genres.

Despite the decline or absence of certain brands like Tower Records and HMV in other countries, these continue to operate in Japan under Japanese companies, successfully adapting legacy brands to the changing market. However, the rise of e-commerce and the decreasing population of young people in Japan are trends that are hard to counter. The peak in 1992 saw 3 200 record stores across Japan, but by 2010, this number had dwindled to around 700, and though there's no recent public figure, it is believed to have decreased significantly since then.

To counter these trends, there are stores that specialise in vinyl, often incorporating cafes and event spaces, or opening smaller outlets in suburban shopping malls. Urban areas also have specialised genre-specific retailers, like Disk Union, which operates multiple stores each specialising in different genres, covering niche artists and works. Additionally, there are various retailers focusing on specific genres or tastes. However, it must be kept in mind that it is difficult for Japanese retailers like Disk Union to buy small quantities of physical albums from many small European labels. A distribution solution that would facilitate that could be helpful. For niche genres and artists from elsewhere, selling a thousand units can already be considered a bestseller, it's normal to sell 200-300 units of a release.

Tower Records has a flagship store with nine floors in the heart of Shibuya, Tokyo, featuring J-POP, K-POP, Anime, Idol, and Vinyl, in addition to operating 73 stores nationwide.

<https://tower.jp/>

HMV operates as a subsidiary of the Lawson convenience store chain, with 52 stores across the country. Recently, HMV has been focusing on hybrid stores that combine music and books.

<https://www.hmv.co.jp/>

In terms of domestic retailers, **TSUTAYA** and **Shinseido** are well-known. TSUTAYA operates CD rental and sales stores, with around 1,000 stores nationwide. **Shinseido** was famous as a national chain of CD sales but now operates 43 stores across the country due to market changes.

<https://tsutaya.tsite.jp/>

<http://shinseido.co.jp/>

disk union operates genre-specific stores in urban areas, featuring various genres like Jazz, Soul/Dance Music, Progressive, Metal, Punk, and others. They also sell used CDs and records in their stores.

<https://diskunion.net/>

Amazon is widely used in Japan for purchasing music products, along with **Rakuten**, a Japan-originated online mall. Additionally, the previously mentioned CD chains also operate their own e-commerce websites.

<https://www.amazon.co.jp/>

<https://www.rakuten.co.jp/>

5.5. Collective management of neighbouring rights

Neighbouring rights are safeguarded within the framework of copyright law. This encompasses exclusive rights to reproduction, distribution, transmission, and lending, as well as the right to collect fees for secondary use (such as broadcasting fees for records) and remuneration for renting records (rights subsequent to the one-year rental period). Additionally, there is the right to receive compensation for private audio and video recordings. These rights are uniformly granted to record producers from countries that are signatories to international conventions pertaining to record rights.

RIAJ represents the collection of sound recording royalties from uses such as TV programs on digital networks, webcasting, CD rentals, bridal events, and educational events. For the performance part, the **CPRA** collects royalties. Since 1998, as a full member of the Societies' Council for the Collective Management of Performers' Rights (SCAPR), they have been actively engaging in agreements with overseas performers' rights management organisations and working on the international protection of performers' rights.

5.6. Releasing and distributing your music in Japan

The simplest way to distribute music in Japan is to use TUNECORE Japan for digital distribution. They have distributed a wide range of music from bedroom artists

¹⁸ Gaiax (2024). April 2024 edition! Number of SNS users by gender and age (13 media including X (Twitter), Instagram, TikTok, etc.). Available online: <https://gaiax-socialmedialab.jp/socialmedia/435>.

to DIY artists and management companies conducting large tours, returning 12,6 billion yen to artists in 2022. Their service includes distribution to global DSPs as well as domestic ones in Japan, QQ Music in China, JOOX in Asia, and others, offering distribution to over 55 platforms in 185 countries within as little as two days. They also collaborate with JASRAC to provide comprehensive services including copyright management, distribution of unique Japanese karaoke booths, and monetization on YouTube.

For management/independent labels with a significant catalogue, distribution through a Japanese distributor is also possible. International distributors like The Orchard, Believe, and FUGA (Spaceshower FUGA as JV) have established local offices. If you already have a contract with such distributors, it's crucial to request distribution to Japanese DSPs, at least to LINE MUSIC, through your partner.

If you're satisfied with your current partner for digital distribution, you might be interested in the distribution of physical products in Japan. Often, international artists release Japanese editions through licensing and other agreements with local partners. Communication with the aforementioned labels and others would be the starting point.

Additionally, there are companies like JET SET and Double Connect that offer DIY manufacturing and distribution of vinyl and CD in Japan. Toyo Kasei, renowned for vinyl manufacturing, also provides manufacturing and distribution services.

According to **Shoka Watanabe** from Beatink, press releases and interviews often require careful translation and localisation for the Japanese market. While promotional strategies focus on securing feature stories and interviews, budgets remain a common inquiry from journalists. Release dates in Japan typically fall on Wednesdays, with some retailers offering sales starting on Tuesdays. However, Friday releases can be challenging due to weekend restocking limitations.

The Japanese market heavily favours physical sales, primarily CDs, accounting for over 60% of the market share. Approaches focusing on purely digital and streaming often fall short. Touring and radio promotion play a crucial role in driving both physical sales and streaming figures. However, a single or even an EP is not enough to drive these campaigns, an album release is needed. Apple Music holds prominence as the leading platform, Spotify's impact remains less significant.

The global popularity of "OBI strips,"¹⁹ the traditional Japanese CD packaging elements, presents a unique challenge. Artists now seek greater control over OBI design, deviating from past practices. Notably, brokers often prioritise artist recognition over in-depth musical knowledge when making selections.

Haruo Mita from Superboy notes that interest in European music has been in decline since the 1970s as the appeal of music from the US and UK has grown. However, jazz and other niche scenes remain vibrant as well as European classical music.

Promotion plays a crucial role in artist recognition and the artist image is extremely important. It is useful to keep an eye on trends as some genres might have a local "boom" of sorts and artists active in that scene might develop an audience in Japan.

For European artists aspiring to break into the Japanese market, building recognition among the audiences and industry is crucially important as. Creating a buzz before embarking on tours and crafting a compelling image that resonates with local audiences can signal to local promoters that there are enough potential ticket buyers and promoting a tour or a show is perhaps worth the risk. Leveraging social media platforms as well as collaborating with Japanese artists can also open doors to new opportunities.

In a few curious cases, crowdfunding has proven to be a viable option for funding projects and gauging audience interest. In a case with a Polish artist performing in Japan the album project raised enough crowdfunding directly from the audience during a concert in the form of a pre-order, signalling significant trust.

In general, there are two situations: either the concert organiser tries to organise something before the album is released, taking risks; or the album is already out, performing well, and the organiser wants to organise a concert.

19 An OBI strip is a paper band or a folded paper flap as an addition to your Vinyl Sleeve. The OBI strips are best known from the Japanese import releases where they usually contain the release info in Japanese ([Deeppgrooves](#)). See more on *obi* on [Wikipedia](#).

In focus: Releasing Music in Japan

The Case of Benny Sings

The section is based on an interview with Benny Sings' manager **Jochem Tomp**, founder of Soepermarkt Music Management.

[Soepermarkt Music Management](#) is a Dutch-based group of music companies offering services to artists ranging from artist management, music publishing and label services. Soepermarkt started the publishing side of their company in 2017 and today, they represent eight artists, the most well-known of whom is [Benny Sings](#).



Photo by Yaz Dinaully

Benny Sings in Japan

Benny Sings has achieved worldwide recognition, including in Japan, where he has been performing since 2008. His first opportunity arose when another artist, already gaining momentum in Japan, invited Benny to join him as a featured artist. This collaboration helped Benny make valuable contacts. During that time, Benny was more (active) of a producer and featured artist for other Dutch artists rather than a solo act.

In addition to performing, Benny's music also got licensed to a Japanese label (JVC Kenwood Victor Entertainment) through a German label in 2006/2007 (Sonar Kollektiv). After releasing the first album with the Japanese label, Benny also started to get more invitations to perform at shows in Japan. Throughout the years he's been invited numerous times to Japan to perform in Tokyo and Osaka and Okinawa.

Benny's activities in Japan extend beyond performing and touring. He and his manager, Jochem have taken a comprehensive approach to the market, with Benny collaborating with local artists, releasing music locally and creating bespoke music for Japanese commercials.

Benny Sings has been able to find a nice niche for himself with his music having kawaii "cute" appeal. According to Jochem, connecting with a particular scene and carving a niche there can be a good way to establish an audience in Japan.

Local Partners In Japan

Having local partners in Japan is essential. In addition to their local Japanese label partner, JVC Kenwood Victor Entertainment, Jochem and Benny have been working with the well-known US label Stones Throw Records since 2017, which has a strong profile in Japan. Being under a US label helped boost Benny's credibility in Japan and opened up numerous promotion opportunities. Jochem notes that Japanese audiences look up to artists from the US and UK and this helped Benny since audiences there viewed him as a US artist rather than a Dutch artist.

In addition to having a label with strong ties in Japan, Benny also has a local sub-publisher. He also works with a local advertising agency through which he does bespoke music for commercials and TV series. Regarding booking, Benny and Jochem managed it themselves in the early years, but since 2018, they have been working with a local booking agent. This collaboration has also opened up opportunities to perform at more venues.

Building A Network of Partners in Japan

Firstly, Jochem notes that it's important to find out if the artist even has an audience in Japan. Nowadays, it's easy to do this by checking Spotify data and social media metrics. These metrics can then be presented to potential Japanese partners to help convince them to work with the artist.

According to Jochem, finding a label partner should be the initial priority since they can act as a base for the artist in Japan. However, it's important to find the right label for the artist's niche. There are thousands of labels in Japan and it's a matter of finding the one right for that particular artist. Having a local label is also important because any booker, live agent, etc. will always look at the existing partners and it helps if those partners are well-known within their network.

Jochem mentions the examples of two R&B/Neo-Soul/Jazz artists Joya Mooi and Bnnyhunna that he works with who have signed deals with niche labels in Japan for their type of music. These labels are dedicated to their niche and have a great reputation in the R&B/Neo-Soul/Jazz scenes in Japan.

Advice for Artists Seeking to Pursue Opportunities in Japan

Jochem also emphasises the importance of the artist having a long-term plan for Japan. This is particularly relevant since Japan is a far-away market and going there typically requires a substantial investment. “It’s not something you can do with one album or EP,” Jochem notes.

Another piece of advice from Jochem is to work with local artists. “In my experience, especially in Japan, working for local ad agencies, brands or artists (big or small) can help an artist get out there and stay active in the country. It’s one of the best things to do if you want to cross over into new territory. Because the local artists usually have the whole set-up (label, publisher, booking agency etc).”

Jochem brings out the example of another artist (GOSTO, Roel Vermeer) he works with, with whom they got funding from the Dutch government to pursue the Japanese market. They worked with the media, performed at showcase festivals and played many smaller shows. Two years later, GOSTO came out with their second record and did a small Japanese tour where they played shows to approximately 50-100 people. This artist also collaborated with Japanese artists and did a local commercial. In the end, the whole venture cost quite a bit of money but because of the artist collaborations and advertisements, some of the money did come back. All of this was made possible by GOSTO having a

record deal with a local Japanese label, Sign-Pole Records.

All in all, pursuing a new market will always be a high-risk investment.

Challenges of Working with the Japanese Market

The language barrier and culture of hierarchy can still pose a challenge for European artists and music professionals aiming to work with the market. There are numerous unwritten social rules on how to do business, and how to communicate that might be hard to adhere to without knowing the culture well. Business relationships take time to build and things can move slowly.

Likewise, Europeans can experience some difficulties with promotion since it differs from how it’s done in Europe. For example, in the Netherlands it’s customary for the artist or their manager to reach out to the media, playlist editors on Spotify, radio DJs, etc. However, in Japan that is not done, everything must go through the label. They have a concrete system and way of doing things. If you have a label, they will handle all aspects of promotion and it is crucial to avoid circumventing or undermining their authority, as this is perceived as disrespectful.

6. Music publishing sector

In Japan's thriving music publishing sector, JASRAC and NexTone stand out, with JASRAC's 2022 fiscal year collections reaching €801 366 137, up 10.5%, and NexTone marking a 20% increase. This growth reflects an industry that has evolved from its sheet music roots to a diverse landscape managed by 360 members of the Music Publishers Association of Japan (MPAJ). Key players like Fujipacific Music and Nichion, Inc. significantly support artists, manage vast catalogues, and contribute to the industry's dynamism. Global giants such as Sony, Universal, and Warner Music also play a crucial role in managing a wide range of artists and songs.

Royalty collection in Japan often involves partnerships with entities like JASRAC or NexTone, which have expanded their scope to meet the industry's digital demands. Engaging with Japan's audience requires collaboration with sub-publishers and marketing departments, particularly for syncing music to media, often necessitating the creation of new, tailored songs. Localisation efforts, including adapting international tracks for Japanese commercials, help overcome language barriers and resonate with local audiences. Events like the "TOKA Songwriting Camp 2023" illustrate the industry's commitment to fostering international collaboration, reflecting its continuous evolution and dedication to maximising the potential and reach of music.

6.1. Music publishing industry in figures

For the fiscal year 2022, JASRAC's collection amounted to €801 366 137, representing a +10,5% increase from the previous year. This growth was partly due to an 18,9% increase in Interactive, which includes thriving music streaming services, video streaming, and UGC services. Additionally, performances saw a significant boost of +12,6%, aided by the relaxation of various restrictions (as part of COVID-19 countermeasures), resulting in the highest collection amount ever recorded for the organisation.²⁰

Another key player, NexTone, reported a collection amount of €63 540 373 for the period from April 2022 to March 2023, marking a substantial increase of +20% compared to the previous year.²¹

When adding the figures from both companies, the music publishing market size amounts to €865 541 901. The share of each segment is as follows: Interactive (Digital download, Streaming and video streaming) at 41,2%, Performance at 40,2%, and Recording at 14,6%.

	JASRAC+NexTone EUR
Public performance (Live performance, Broadcast and cable music broadcasting and public spaces)	€347 923 441
Recording (Physical audio products and Videogram)	€126 047 832
Publishing (Sheet music, printed media)	€4 339 801
Game/Advertising	€26 453 919
Rental CD	€3 537 764
Interactive	€356 454 925
Other	€784 217
Total	€865 541 901

Figure 3. Revenue from music publishing (in €), breakdown by format, 2022.

6.2. Main actors in the music publishing industry

In Japan, when music publishers were first established, they were literally sheet music publishers. However, over time, there has been an increase in entities from industries that frequently use music, such as record companies, movie studios, and broadcasting stations, entering the copyright business.

Currently, there are 360 members in the Music Publishers Association of Japan (MPAJ), which can be broadly classified into three categories. 1) Music publishers that are part of media corporations; these publishers work with songs for tie-in with "TV dramas and news programs" theme music and manage a portion of those music publications to generate revenue. 2) Music publishers by management companies. These are companies that manage talent or singer-songwriters and oversee their music publishing. 3) Record company-affiliated publishers aiming to maximise efficiency and profits by managing their own catalogue and artists' music publications. Additionally, various other industries such as cable broadcasting, video games, theatre companies, karaoke, advertising agencies, and book publishers have also entered the music publishing business.

Fujipacific Music, with a 55-year legacy, has significantly contributed to Japan's music scene by supporting artists and creating hits, involving over 1,000 songs that have topped the Oricon charts. As a sub-publisher for numerous global music entities, its repertoire spans genres from pop to EDM, deeply involved in making these songs resonate within the Japanese market. Fujipacific Music Inc. is part of Fujisankei Communications Group, Japan's largest media-conglomerate.

20 JASRAC (2023). Fiscal Year 2022 Activities. Available online: https://www.jasrac.or.jp/information/release/pdf/230524_business_in_2022.pdf.

21 NexTone (2023). Financial Results Briefing for the Fiscal Year Ending March 2023. Available online: <https://contents.xj-storage.jp/xcontents/AS06583/f72f1594/a770/4fe4/bd7c/323bde555820/140120230511566914.pdf>.

Nichion, Inc., established in 1963 as a subsidiary of Tokyo Broadcasting System (TBS), is one of Japan's largest music publishing companies. It manages a vast catalogue of nearly 40 000 domestic titles and over one million international songs, representing over 300 international catalogues including peermusic, Bourne, and Wixen Music Publishing. Nichion is deeply involved in all facets of music publishing, including copyright acquisition, administration, song pitching for various media, and new artist and songwriter development.

Shinko Music Entertainment, established in Tokyo, is primarily recognised for music publishing. They are notable for publishing music books, magazines, and scores. Their publications often include guitar and piano scores of popular songs, as well as magazines.

Sony Music Publishing, Universal Music Publishing, and Warner Music each have subsidiaries in Japan that manage the music publishing of various artists, both domestic and international.

6.3. Collective management of copyright

In Japan, to collect copyright royalties, one needs to have a contract with either JASRAC or NexTone. Composers, Authors and music publishers need to be [members of JASRAC](#).

NexTone, which started as a company specialising in digital collections, has some areas it initially couldn't cover but has been catching up over the years. Composers, Authors and music publishers need to [have an agreement](#) with NexTone.

Additionally, as a member of CISAC, JASRAC has mutual representation agreements with other countries' CMOs. NexTone is also bolstering its collection of international copyright fees through partnerships with entities like SACEM, SDRM, and IMPEL.

6.4. Distributing your catalogue and creative collaborations in Japan

To broadly engage with audiences in Japan, television's role is vital. In this case, forming a sub-publishing contract with Japanese music publishers is crucial, leveraging their network, trust, and marketing skills to pitch to TV stations and producers. Music publishers with a track record as sub-publishers are introduced in section 6.2. Conventions like TIMM also provide good opportunities to connect with other music publishers. The landscape for international conferences has diversified over time, with MIDEM being a historical example.

TV commercials also hold significant marketing power and are best approached through sub-publishers. In this context, there may be a gap between the song or artist's context and the narrative that resonates with Japanese audiences, requiring creative adaptation and flexibility, essential for breaking into the Japanese market.

Music publishers, including the companies mentioned above, are increasingly hosting Co-writing Camps. To seize such opportunities, regular communication with Japanese music publishers is necessary. In Co-writing Camps with Japanese songwriters, Japanese often becomes the primary language, though English speakers may be present, and music can transcend language barriers in creative settings. However, contracts might be in Japanese, necessitating preparedness for this.

For instance, in the "TOKA Songwriting Camp 2023" organised by TOKA Inc. and Fuji Pacific Music in 2023, international artists like Edbl (UK), AILI (BE), and The Beamish Brothers (Australia) participated.

In focus: Working With the Japanese Market as a Publisher

The Case of Sugar House Publishing

This section is based on an interview with **Ann Slangar**, the CEO of Sugar House Publishing

[Sugar House Publishing](#) is an internationally working music publishing company based in Finland with a strong presence in the Asian market. They focus primarily on songwriting for J-pop, K-pop, and C-pop and their writers have been awarded several GOLD and MULTI PLATINUM awards.

Getting into the Japanese Market

Sugar House Publishing started as a management and label back in 1998 and they started working as a publisher in 2004. They met their Japanese partner [Soundgraphics](#) at the Midem Music Exhibition in France in 2008, and soon after they came over to Finland to work on some co-writes. These co-writes resulted in three songs, one of which became Sugar House's first Japanese No. 1 hit two and a half years later. Their cooperation with Soundgraphics continued and in the following years, they had six Number 1 hits in Japan in a row, working with some of the biggest Japanese artists. Today, Sugar House has had a total of 70-80 No. 1 releases in Japan.

Other Markets Sugar House Works With

Apart from Japan, Sugar House also works with South Korea, China, Hong Kong, Singapore, Taiwan, and Malaysia. The company's focus is on Asian markets - this is where they invest the most time and resources. Their producers do occasionally have releases in Nordic markets or the US, but this is not something Sugar House actively focuses on.

In a way, Ann notes, Japan was their gateway to Asia. Much of the communication with China and Korea flows through Sugar House's Japanese partner, although they do have local partners in those markets independent from their Japanese partner. Their Japanese partner, Soundgraphics also has a strong network in the Nordic countries and the UK and it's not uncommon for them to be working on a song with producers/topliners from Sweden, for example, mediated by Soundgraphics in Japan.

Main Japanese Partner

In Japan, it's customary to only work with one publishing company. The company Sugar House works with is [Soundgraphics](#) - one of the biggest publishers and song-plugging companies in Japan. They have a large network of writers and producers that they work with in Asia and Europe. They are also very professional and internationally oriented and have a large number of staff.

Soundgraphics sub-publish Sugar House's catalogue in Japan and they have been working together for 15 years on creative collaborations. Typically, Sugar House will receive a brief for a song from Soundgraphics and then the writers and producers will work on it, usually together with other

writers and producers commissioned by Soundgraphics. Most, if not all of the work, happens virtually with writers and producers working on briefs primarily individually.

The workflow can vary per song - sometimes a song is worked on individually at Sugar House and then sent to their Japanese partner, and sometimes the process is more collaborative. Occasionally Soundgraphics will ask for a specific producer or topliner for a song. One common theme includes tight deadlines though so musicians need to be able to work well under pressure as well as be open to receiving feedback and making changes within a short timeframe.

Writers and Producers at Sugar House

Because they invest a significant amount of time and resources into mentorship and guidance, Sugar House mostly works with their writers on an exclusive basis. This guarantees a steady long-term relationship. They do occasionally work with some writers or producers on a song-by-song basis but the focus is on developing exclusive long-term relationships.

Physical and DVDs

Part of the reason for Sugar House to focus on Japan was due to Japan's emphasis on physical releases. The Japanese music market is the second biggest after the US, and physical releases (CDs, vinyls) as well as merch are still very popular amongst Japanese audiences. The physical music market has decreased a bit in the last few years due to the introduction of streaming platforms like Spotify, however, it still remains a lucrative market for physical releases.

Differences Between Writing for Japan vs Europe

Writing music for a European or Western audience is significantly different from writing for a Japanese audience, Ann explains. When it comes to Japan "more is more". Melodies are more intricate and there is less repetition and more emphasis on variety within a song. Songs need to be built in a completely different way. After working with Japanese music, Western music can sound a bit bland and repetitive in comparison, Ann notes.

To work successfully in the Japanese market, particularly in J-pop, one must be a skilled and knowledgeable musician, have versatile skills and have the ability to mix genres.

Ann also mentions that there has been more collaboration happening recently between J-pop and K-pop, with songs being released that are a mixture of both. Usually, there will be both a J-pop and K-pop label behind these songs. Both K-pop and J-pop are starting to open up a bit more to Western influences, which could lead to more opportunities for European producers and songwriters.

6.5. A brief overview of the synch sector

In Japan, the sync process involves not only sub-publishers but also the marketing departments within record companies playing a significant role. It's crucial to get them actively involved. In addition to syncing existing songs, it's common in Japan to commission new songs frequently. These new creations often need to reflect the image or theme of the product being featured in TV programs or commercials. Due to the high demand for syncs, famous artists receive numerous requests, which can shorten the cycle of creating and releasing new songs. New song syncs are primarily aimed at maximising the song's hit potential, and licences are often granted for free.

In Japan's movie and net drama industry, roles akin to music supervisors are rare. For a song to be featured in anime or films, it's crucial to be "in the same boat" by participating in production committees from the start or even investing in the project.

For international songs to be used in Japanese TV commercials, localisation in terms of language for biography and other storytelling materials might be necessary. To overcome the language barrier among the majority of domestic audiences, techniques like adding Japanese lyrics or covers by local artists are often employed.

In Focus: Writing for Synch in Japan

The Case of Black Cat White Cat Agency and Sander Mölder

This section is based on an interview with **Seiya Matsumiya**, music supervisor and CEO/co-founder of Black Cat White Cat Music.

[Black Cat White Cat Music](#) is a full-service agency providing music supervision services for all types of visual media. Their primary focus is on the Japanese market, where they have carved out a niche by working with international composers and bringing global music to the Japanese market. They work with over 20 composers worldwide on a consistent basis and are always open to finding new talent.

The Japanese Synch Market in General

Seiya, the agency's CEO, notes that while there are many domestic music houses in Japan, there are only a few companies that work with international artists and operate in this niche. There are also a few sync agents representing the catalogue for sync, however, this has been changing in recent years.

The sync market in Japan differs greatly from that of Europe or the US. For instance, in Japan, broadcast royalties are paid by the brands themselves, not the broadcasters. This adds an additional cost for brands. Consequently, brands often prefer commissioning custom-made songs over licensing existing ones unless they strongly favour a specific track.

A song can be used in any media for up to a year from its release without paying royalties, after which royalties must be paid for any sync usage. Sometimes, brands will work with an unknown artist for a reduced fee in exchange for exposure.

Seiya emphasises the importance of working with a local partner or sub-publisher in Japan, particularly to facilitate royalty collection. For example, Black Cat White Cat's sub-publishing department manages collections for artists and composers without a Japanese publisher. Without a local sub-publisher, collecting royalties can be challenging.

Finding a Local Partner

International artists seeking to enter the synch market in Japan would benefit greatly from working with a local partner who understands both the Japanese and international markets.

Examples include agencies like Black Cat White Cat as well as larger labels with dedicated international sync departments (e.g., Universal, Warner). It's important though that the local partner would also speak good English and have a grasp of the international market.

There are also fewer sync agents representing catalogues in Japan than in Europe or the US, for example. However, there is potential growth and hopefully, in a few years there will be more people taking on international catalogues - for now, it's just Black Cat White Cat and a few others.

Examples of European Composers // Sander Mölder

Seiya has been collaborating with Estonian composer [Sander Mölder](#) since 2017, whom he met through the music export organisations of Estonia and Finland. Initially, he received an invitation from Music Finland to go to Tampere and that's where he met Thea Zaitsev, Sander Mölder's manager. Thea then invited Seiya to Estonia, where she introduced him to Sander. Shortly after that trip, Seiya received a project that suited Sander, and their collaboration began.

Together they have worked on numerous Japanese advertisements for brands like Uniqlo, Shiseido, DHC, and more. These have all been successful, winning awards like the CICLOPE Asia award and getting positive feedback. Last year, Sander also worked on an ad for Shiseido which featured Anne Hathaway.

Black Cat White Cat also work with numerous other European composers, many of them from Germany. Each composer has their own niche but is versatile enough to really do anything. The agency prefers to form long-term partnerships with composers and work with them on many projects over the years. Hence, many composers have worked on hundreds of projects.

The workflow typically involves the agency receiving a brief for a project and then assembling a small team of composers who might fit the brief, asking them to submit a demo and then working on the project with the composer who fits best.

By focusing on international collaborations and maintaining strong local partnerships, Black Cat White Cat Agency have successfully introduced global music to Japan. Their work with composers like Sander Mölder showcases the opportunities and potential that Japan can offer to international artists. For those aiming to enter this market, it's crucial to partner with local experts, understand market specifics, and focus on long-term collaboration

7. Media and PR

7.1. Social media

As global platforms increasingly refrain from disclosing their user numbers in Japan, below are based on publicly available data and information from the Ministry of Internal Affairs and Communications.

Platform	Most-used *Aged 16 to 64	MAU in Japan	as of
LINE	79,6%	96 000 000	Sep. 2023
X (Twitter)	58,2%	45 000 000	Oct. 2017
Instagram	47,7%	33 000 000	Jun. 2019
Facebook	30,8%	26 000 000	Mar. 2019
TikTok	15,5%	9 500 000	Feb. 2019

Table 6. Most used social media platforms in Japan.²²

In Japan, social media has deep penetration, with 102 million users representing 81,1% of the population, showing a growth of +8,7% from the previous year. The average daily usage time remains at 51 minutes. The demographic most active on social media is women aged 25-44, followed by women aged 18-24, with men in the same age brackets also being significant users.

The most popular platform is LINE, a Japanese messaging service that has evolved into a Super App encompassing video media, official business accounts, payment functions, food delivery, and music services. LINE surged in popularity as a communication tool during the 2011 East Japan earthquake and currently boasts 96 million users.

The second largest platform in MAU is X (Twitter). While there's been no disclosure of user numbers in Japan since 2017, the platform's vitality is evident from the discussions generated by artists, celebrities, and media. Twitter sees high usage rates among those in their 20s at 78,8%. Facebook's usage has decreased by 3% across all age groups, while Instagram's has increased by 1,6%, making it the second most used platform after LINE.

In recent years, TikTok's presence in Japan has significantly grown, giving rise to the term "TikTok Ure" (TikTok Sell), where not just music but books, beverages, and cosmetics see explosive sales through posts and ads on the platform. Japanese artists are leveraging TikTok and YouTube Shorts to generate hits, creating dance-featured songs, music videos, and short clips to encourage user-generated content on TikTok.

SEKAI NO OWARI, a Japanese artist active since 2007, released

"Habit" in 2022. The song's distinctive dance became popular, with numerous dance videos on TikTok under #habit reaching 3 billion views and earning the Japan Record Award. This illustrates how artists are successfully integrating their work with social media to amplify their reach and impact.²³

7.2. Written media – print and online

In the overall Japanese media landscape, printed magazines hold a position as a source of information with 12,9% of respondents in a survey indicating they consider magazines "important." *e.g. Internet 77,8% and TV 82,3%.

While there used to be numerous magazines featuring international artists, several continue to be published today. These include "**rockin'on**" with a circulation of 200 000 copies, "**INROCK**" with 125 000 copies, and "**BURRN!**" with 100 000 copies. Additionally, there are specialised magazines like "**Jaz.in**" for jazz enthusiasts.

Furthermore, **Rittor Music** publishes specialised instrument magazines like **Guitar Magazine**, **Sound & Recording**, **Bass Magazine** and more, which can also effectively serve as promotional platforms for international artists.

Music-specialised web media is very important for sharing artist releases and tour information.

There are many web media featuring international artists such as, **BARKS** (2,5M UU), **Rolling Stone Japan**, **NME Japan**, **rockin'on.com**, **Mikki, skream!**, **Geki Rock!**, **Spincoaster**, **Frontrow**, **amass**, etc.

- www.inrock.co.jp
- nme-jp.com
- burrn.online
- rockinon.com
- jazin.net
- mikiiki.tokyo.jp
- www.rittor-music.co.jp
- skream.jp
- guitarmagazine.jp
- gekirock.com
- www.snrec.jp
- spincoaster.com
- bassmagazine.jp
- front-row.jp
- www.barks.jp
- amass.jp
- rollingstonejapan.com

²² Japan Ministry of Internal Affairs and Communication (2023). Survey Report on Usage Time and Information Behavior for Information and Communication Media in 2022. Available online: https://www.soumu.go.jp/iicp/research/results/media_usage-time.html.

²³ Ibid.

7.3. Radio

In Japan, radio stations consist of key stations and local stations, each with its AM and FM broadcasts. Key stations are larger and characterised by their nationwide program distribution. Historically, AM broadcasts were talk-centric while FM focused on music, but this distinction has been diminishing recently.

To prevent signal interference, key and local stations form networks within specific areas to distribute radio programs. Key stations, typically based in Tokyo, hold a central role in these networks, often producing programs and selling them to local stations across the country. They also handle the advertising revenue from these programs, distributing a portion to the local stations.

AM broadcasts usually cater to domestic audiences, whereas FM stations are more relevant to international artists.

In Japan's major cities, many radio stations have distinct programming and music lineups, with some mixing domestic and international music and others specialising in international music.

Promotion to these radio stations is generally managed by record companies and promoters, making it common to approach them through Japanese partners. The introduction of Radiko in 2013, a service that simultaneously streams radio broadcasts on the internet, has popularised radio among the youth via the Internet and smartphones. As of 2022, Radiko boasts 9 million monthly active users (MAU) and offers premium subscribers the ability to listen to radio programs on demand.

If we pick the most relevant station to international artists, InterFM is the one and J-WAVE would follow.

Nama	City	Website
J-WAVE	Tokyo	www.j-wave.co.jp
InterFM	Tokyo	www.interfm.co.jp
Tokyo fm	Tokyo	tfm.co.jp
NHK FM	Nationwide	hwww.nhk.or.jp/radio
Fm yokohama	Yokohama	www.fmyokohama.co.jp
BAYFM	Yokohama	www.bayfm.co.jp
NACK5	Saitama	www.nack5.co.jp
ZIP-FM	Nagoya	zip-fm.co.jp
FM802	Osaka	funky802.com
FM COCOLO	Osaka	cocolo.jp
FM Osaka	Osaka	www.fmosaka.net

Table 7. Main relevant station to international artists in Japan.

7.4. Television

Japanese television consists of public broadcaster **NHK**, five terrestrial commercial key stations, quasi-key stations, local stations, independent stations, BS (Broadcasting Satellite) and CS (Communication Satellite) satellite broadcasts, and cable television. In Japan, the Tokyo-based stations predominantly serve as key stations, often referred to as “Zai-kyo” key stations.

Beyond these, the Osaka and Nagoya stations follow in prominence, sending out many programs and are thus known as quasi-key stations. The key stations include **Nippon TV, TV Asahi, TBS, Fuji TV, and TV Tokyo**, alongside NHK, which offers nationwide broadcasting and airs over 50 music-related programs. However, these music shows are predominantly focused on domestic (Japanese) music, with international music featured more frequently on BS stations, including “Best Hit USA” (BS Asahi) and “Ito Seisoku’s Rock TV” (BS Fuji).

Promotion of music typically focuses on these key and BS stations. While not many terrestrial programs feature international artists, “Music Station” features internationally successful artists in Japan. NHK’s “Kohaku Utagassen,” aired annually on December 31st, is mostly domestic artists, but in 2023, QUEEN + ADAM LAMBERT appeared.

Breaking into the wider Japanese audience also involves being featured in morning information programs like “Sukkiri,” which, although primarily a news and trends show, has robust music and entertainment sections and frequently features international artists. In February 2023, artists such as Wetleg (UK) and AURORA (Norway) appeared, with their Grammy win and soundtrack contribution to “Frozen II” serving as relatable topics for the Japanese audience. However, it’s announced that “Sukkiri” will conclude in March 2023.

→ www.tv-asahi.co.jp/music

→ www.bsfuji.tv/itourocktv/pub/index.html

→ www.nhk.or.jp/kouhaku

→ www.bs-asahi.co.jp/usa

→ www.ntv.co.jp/sukkiri

7.5. Developing a PR strategy for Japan

Typically, PR related to the release of songs and the announcement of performances in Japan is handled by the promotion department of Japanese partners. This requires compiling as much relevant information as possible to pique media interest. For more effective PR in Japan, it's crucial to create news and information relevant to the Japanese audience. Japanese media favour narratives like topping rankings or winning awards, so it's essential to prepare such related information, regardless of the news's scale. Recently, acts like Måneskin have found success in Japan with angles like winning the Eurovision Song Contest, coupled with their music style and performance resonating with the audience.

The importance of social media is the same here, where activities related to Japan posted in Japanese can enhance audience engagement and potentially garner media

attention. Another strategy is collaboration. Partnering with compatible Japanese artists or engaging with beloved Japanese culture, like anime, can expand the audience and provide new angles for media coverage. Direct communication through social media and messaging apps to facilitate collaborations has become commonplace.

With the emergence of PR firms like [Vegas PR Group](#), which have an international background, it's crucial to plan according to the music style and vision of the activities. These firms can provide tailored strategies and support to effectively navigate the unique Japanese media and audience landscape. PR services are expensive in Japan, for example the price range for a PR service featuring two curated pieces and some coverage might cost approximately \$3500. However, investing in developing an audience in Japan can be a smart investment as Japanese fans are very loyal and can remain with an artist for their entire career.

8. Music scene snapshots

J-POP

J-POP, short for Japanese Pop, became a widespread term for Japanese pop music after its initial use by a radio station in 1988. The distinction between pre and post-J-POP lies in the BPM speed and the influence of Western music, evident in the melodies, chord progressions, and rhythms. Compared to the Showa era of traditional Japanese music, J-POP saw an increase in songs with deconstructed lyrical structures replaced by more refined grooves. J-POP doesn't refer to a specific genre but rather encompasses most pop music by Japanese artists after its inception.

As J-POP evolved, it became the focal point of CD sales and live entertainment, with its relatable lyrics and absence of language barriers leading to a significant increase in the scale of artists. Japanese boy bands often collaborate with Nordic songwriters, reflecting a long history of active collaboration. In the 90s and 2000s, J-POP frequently incorporated influences from foreign music genres and sought remixes from European and US DJs.

From the 2010s onwards, Japanese artists have actively collaborated with international counterparts. Influenced by the then-mainstream R&B and Soul, artists like AI collaborated with The Jacksons, and Nissy with Nick Carter. These collaborations occur both when Japanese artists seek partnerships and when international artists aim to tap into the Japanese market.

The current characteristics of J-POP itself can be described as having a melody line with intense ups and downs, and songs that include a variety of musical tastes. Spotify has named this feature "Gacha Pop" and is trying to promote current J-POP overseas through playlists. The definition of "Gacha Pop" is described as "Japanese pop inspired by colourful capsule toys (gacha-gacha), expressing a pop and miscellaneous fun like turning over a toy box, where you don't know what will come out."²⁴

Additionally, collaborations between contemporaries, such as the J-POP band SEKAI NO OWARI with Owl City, or cultural crossovers like Steve Aoki remixing Kyary Pamyu Pamyu's songs and her performance at Porter Robinson's festival, highlight the vibrant, interconnected nature of the global music scene. These instances provide insight into the collaborative spirit that defines the evolving J-POP landscape.

JAZZ

Japan is often recognized as one of the countries where jazz is most prevalent worldwide. It's a genre that's become a familiar presence in chain cafes, pubs, and even buildings in train stations, symbolising sophistication, tranquillity, and maturity. In the 70s and 80s, artists like Sadao Watanabe and Terumasa Hino were even featured in TV commercials, indicating jazz's significant cultural impact.

Despite the scene's ups and downs, Japan boasts enduring and established jazz venues such as Shinjuku Pit Inn, open since 1965, Blue Note Tokyo since 1988, and newer establishments like JZ Brat, Billboard Live Tokyo, and Cotton Club. These venues, offering everything from energetic to refined performances, have cemented Japan's status as a jazz hub with a rich array of domestic and international players.

The scene has been further revitalised with the shift towards non-smoking environments. Since around 2010, artists like Robert Glasper have made jazz more accessible to hip-hop listeners. This trend is evident in Japan, where young musicians effortlessly blend jazz with their musical backgrounds, like drummer Shun Ishiwaka and trumpeter-pianist Mao Sone, both born in the 1990s.

Critics like Mitsutaka Nagira also play a significant role in Japan's jazz scene. His 2014 publication "Jazz The New Chapter" compiled the after 21st-century jazz scene, updating perceptions of jazz and featuring numerous contemporary jazz artists from Europe and other countries, highlighting the ever-evolving and global nature of jazz in Japan.²⁵

²⁴ Natalie.mu. Gacha Pop. Available online: <https://natalie.mu/music/column/528774>.

²⁵ See https://twitter.com/Elis_ragiNa.

In focus: European Artists in the Japanese Jazz Scene

The Case of Marco Mezquida and Andrea Motis

This section is based on an interview with **Julio Quintas**, booking agent and manager of the artists.

Julio Quintas is the manager/booking agent of the Spanish artist [Marco Mezquida](#) and former manager/booking agent of the Spanish jazz artist [Andrea Motis](#). Both artists have performed in Japan for several years, including at the Tokyo Jazz Festival and [Blue Note Jazz Tokyo](#). A vital part of establishing their Japanese connection came through their manager/booking agent who had already established a network in Japan.

Julio first stepped into the Japanese market in 2002, when he worked with two of the members of Buena Vista Social Club, Omara Portuondo and Roberto Fonseca, and booked their performance at the Tokyo Jazz Festival together with their US agency, IMN. Having a network of contacts, helped him secure gigs later on for his two artists.

Marco Mezquida is a versatile pianist, composer, and improviser who is considered one of the most dynamic figures in the Spanish jazz scene. He has recorded 95 albums in total and his musical style ranges from jazz, free improvisation, classical, baroque, or contemporary music, with rock, folklore to flamenco.

Andrea Motis is a jazz singer and trumpeter who has gained a worldwide reputation in the international jazz scene.

Local Partner - Blue Note Jazz and Tokyo Jazz Festival

Having a local partner in Japan is vital. One local partner that Julio has worked with steadily over the years is the international jazz club, [Blue Note Jazz](#). Blue Note has spaces in major cities like New York, Milano, Tokyo, Shanghai and Brazil. The venue hosts jazz concerts as well as dinners and other events. Both of Julio's artists have performed at Tokyo's Blue Note for many years. The organisers there have also subsequently taken them to perform in other venues around Japan.

Releasing Music in Japan

When it comes to releasing music in Japan, Julio and his artists made the strategic decision of not being under a major label. This is due to the fact that labels will often want worldwide representation, even if they do not have a strong department in every country. Not being under a major label allowed Julio and his artists to find local distributors in Japan who could release and promote their albums there both digitally and physically.

Julio explains that physical releases are still important in Japan with there being a large number of music stores selling CDs and vinyl. In most cases, artists will also need a bonus track or a special Japanese edition of an album. This is expected by Japanese listeners and distributors alike.

Space and Demand for European Jazz artists

According to Julio, there is always space for good music. He advises artists to be themselves, showcase their roots and do something unique as there is no barrier to that. In the case of Marco Mezquida, for example, it was his unique style that drew listeners in. Marco is part of a trio with a Cuban double bass player, percussionist and expert with Iberian music. This trio has been around the world. Marco also performed at Tokyo Jazz with his project with Flamenco guitar player Juan Gómez "Chicuelo".

"I think there is a place in Japan, and everywhere if you have something unique," Julio states.

Building an Audience as a European Jazz Artist

The challenge for European artists is becoming visible in Japan. If an artist is good and can attract that visibility, then they can attract listeners. Julio states: "No one at Blue Note, for example, cares that Andrea is Spanish. They book her because she is good and sells tickets" - in other words, because it works for them.

The question is how to get that visibility and how to build an audience. How does one get to the press? How to increase an artist's social media following in Japan? Which social media channels to use at all? It's important to note that the social media channels we use in Europe are not the same as the ones used in Japan. Social media metrics are crucial though and some things that bookers, venues, promoters and festivals will look at.

According to Julio, it's "better not to take for granted that what works for us on our own market, or a given market we are familiar with, will automatically be effective in others, whether it is Japan, China, Argentina or Iceland. In this sense, "local eyes and brains" (namely bookers, distributors, PRs, etc, if they are good) have a great value, since they can explain to us the local habits, changes throughout time, etc." Hence, it's best to have someone who knows the local market tell you which channels are worth investing in and how much. What has helped Julio with his artists Marco Mezquida and Andrea Motis, was working with a local distributor who was willing to invest in artist promotion across multiple channels.

ROCK

Like in other countries, ROCK was accepted as a mainstream genre in Japan amidst societal changes in the 60s and 70s. The 1970s saw a rise in rock bands influenced by Led Zeppelin, hard rock, folk rock, and artists influenced by Jeff Beck. There was a significant debate in the media about whether Japanese rock should be sung in English or Japanese, indicating the intriguing dynamics between Western influence and the formation of a uniquely Japanese style.

Today, when referring to Japanese rock, encompasses artists influenced by the rock of the '60s and '70s, those under the sway of '90s alternative music, and bands influenced by the '80s goth and new wave that have created their own narrative as "Visual kei."

Between 2022 and 2023, the band Måneskin made a significant breakthrough in Japan. Their rock narrative likely appealed to Japanese audiences and those in the music and media industries, reflecting the continuous evolution and global interconnectedness of the rock genre in Japan.

Metal

In Japan, metal evolved from the rock of the 60s and the hard rock of the 70s to become a favoured genre among audiences. As globalisation progressed, the term "Metal" became more common, though it was often referred to as "Heavy Metal" or "Heavy Metal" previously.

Numerous Japanese metal artists emerged, especially in the 80s. Loudness performed at Madison Square Garden, Bow Wow appeared in overseas festivals, and Flatbacker signed with Geffen, marking a period of active international expansion. In the 80s and 90s, bands like S.O.B., which influenced and was covered by Napalm Death, and G.I.S.M, recognized as an originator of "Death Growl," made significant impacts, influencing many bands even before the internet era. Their legacy is now being reevaluated and invited to international festivals.

In the 2000s, Melodic Speed Metal gained popularity among Japanese youth who saw musical commonalities with Anison (anime songs). Bands like Sonata Arctica (Finland) and DragonForce (UK) continue to enjoy strong support in Japan.

More recently, BABYMETAL broke through with their unique style, featuring three women performing songs and dances backed by a band. Other bands like Lovebites, Nemophilia, and Hanabie have also gained international popularity, actively touring abroad. Collaborations with similar artists might prove fruitful given their global appeal and innovative approach to metal music.

Electronic Music

Japan, known for its electronic giants like SONY and TOSHIBA and gaming powerhouses such as Nintendo and Namco, has naturally been an early and vibrant hub for Electronic Music. Pioneers like YMO (Yellow Magic Orchestra), influenced by Kraftwerk, and Ken Ishii, who felt the pulse of Detroit Techno, exemplify this. Ken Ishii's track "EXTRA," with its music video by Koji Morimoto, continues to represent Tokyo and Japanese culture stereotypically.

The scene grew with widely recognized artists like Denki Groove, with member Ishino Takkyu participating in the Love Parade and organising techno festivals in Japan. The internet era saw the rise of artists like DJ Nobu, crossing between Japan and the global stage,

In the 90s and 2000s, companies like Sony Music Entertainment Japan and Avex actively introduced Electronic Music, featuring Japanese artists and collaborating with international ones. J-POP artists often sought remixes from overseas Electronic Music artists and DJs, like Aphex Twin, merging with the global electronic scene.

Electronica and its subgenres share a significant relationship with media arts. MUTEK Japan launched in 2016, is a testament to the genre's cultural depth, gathering audiences in such innovative spaces.

EDM has also seen substantial growth in Japan, with festivals like Ultra Japan starting in 2014 and clubs like SEL OCTAGON TOKYO, RAISE, and WARP Shinjuku hosting genre DJs and artists.

Collaboration with Japanese pop culture is common; ZEDD collaborated with virtual artist pioneer Hatsune Miku on "Spectrum," and W&W released a collaboration track with the originator VTuber Kizuna AI, expanding their mutual audiences. This synergy reflects the dynamic and interactive nature of Japan's Electronic Music scene, blending technology, culture, and innovation.

9. Music technology and innovation

VTuber

VTuber (Virtual YouTuber) are online entertainers using computer-generated avatars and often real-time motion capture technology. Originating in Japan in the mid-2010s and popularised globally in the 2020s, they use platforms like YouTube, Niconico, Twitch, and Bilibili. The trend, sparked by Kizuna AI in 2016, has led to over 10,000 active VTubers and the formation of agencies like Hololive Production. VTubers often represent characters designed by artists, embodying Japanese pop culture and allowing a broad range of expressions, particularly benefiting marginalised communities.

The COVID-19 pandemic in 2020 significantly boosted VTubers' popularity, making them a mainstream phenomenon with increased viewership and earnings. They accounted for 38% of YouTube's most profitable channels. Despite facing issues like online harassment, the community has continued to grow, with platforms like Twitch acknowledging them through specialised tags. Influential figures like Kizuna AI and Hololive's Gawr Gura have gained international recognition, and the content on Twitch grew by 467% in 2021. This rapid expansion, coupled with recognition from entities like Forbes Japan, underscores VTubing's evolving influence and widespread acceptance.

Metaverse

In Japan, attention to the metaverse is high. According to a 2023 survey, the recognition rate of the term "metaverse" increased more than 400% from 2021 (18.6%) to over 80% (82.1%). The experience rate of using metaverse platforms is 18.0%, with about 40% (39.9%) among Generation Z. The average daily usage time for current users of metaverse platforms is 68.8 minutes.

The platforms commonly used in Japan are domestic ones like **cluster** and **REALITY**, which host live performances for various music artists and develop brand experiences with Japanese companies in the metaverse. Recently, **KDDI**, the country's second-largest telecommunication company, has been developing its metaverse platform.

Globally used platforms include **Fortnite** and **VRChat**. Fortnite is popular for anime and brand company gaming experiences, while VRChat has formed a strong community of Japanese users. Other platforms such as **Roblox** and **Zepeto** are also in use.²⁶

26 Dentsu (2023). Dentsu Conducts "Metaverse Awareness Survey 2023. Available online: <https://www.dentsu.co.jp/news/release/2023/1211-010670.html>.

References

ACPC (2023). Live Market Research / Number of performances, attendance and market size of downloadable live performances. List of Annual Basic Survey Reports. Available online: <https://www.acpc.or.jp/marketing/kiso.php>.

All-Japan Karaoke Industrialist Association. Website. Available online: <https://www.karaoke.or.jp/05hakusyo/2023/p5.php>.

Dentsu (2023). Dentsu Conducts “Metaverse Awareness Survey 2023. Available online: <https://www.dentsu.co.jp/news/release/2023/1211-010670.html>.

Festival Life. Website: https://www.festival-life.com/festival_

ICT (2022). Survey on subscription music streaming service usage trends in 2022. Available online: <https://ictr.co.jp/report/20221111.html/>.

Japan Ministry of Internal Affairs and Communication (2023). Survey Report on Usage Time and Information Behavior for Information and Communication Media in 2022. Available online: https://www.soumu.go.jp/iicp/research/results/media_usage-time.html.

JASRAC (2023). Fiscal Year 2022 Activities. Available online: https://www.jasrac.or.jp/information/release/pdf/230524_business_in_2022.pdf.

Kemp, S. (2022). Datareportal. DIGITAL 2022: JAPAN. <https://datareportal.com/reports/digital-2022-japan>.

MUFG (2019). Survey results regarding the use of online ticket services. Available online: https://www.caa.go.jp/policies/policy/consumer_policy/policy_coordination/internet_committee/pdf/internet_committee_190313_0003.pdf.

Natalie.mu. Gacha Pop. Available online: <https://natalie.mu/music/column/528774>.

RIAJ (2022). Music Media User Survey 2022. Available online: <https://www.riaj.or.jp/f/report/mediauser/2022.html>.

RIAJ (2022). Trend of Recorded Music Production & Digital Music Sales (Value). Available online: https://www.riaj.or.jp/f/e/data/annual/total_m.html.

RIAJ (2022). Audio: Vinyls. Available online: https://www.riaj.or.jp/f/e/data/annual/ar_anlg.html.

RIAJ (2023). Production results and music distribution sales results for the past 10 years. Available online: https://www.riaj.or.jp/f/data/annual/msdg_all.html.

Seth, S. (2024). Transfer Pricing: What It Is and How It Works, With Examples. Investopedia. Available online: <https://www.investopedia.com/terms/t/transfer-pricing.asp>.