

A Guide to Japan's Music Industry

for Global Creatives



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Editor's Note

During my three years studying music business in the UK, I became increasingly aware of a gap in academic discussions –despite Japan being the world's second-largest music market (IFPI, 2024), it remains largely overlooked in case studies, which tend to focus on Western markets, particularly the UK and US. Even at industry conferences, I noticed that insights into Japan's music industry were limited. This led me to a key question: What makes Japan's music market so unique, and why is it still underexplored? There must be distinctive characteristics and business opportunities that have yet to be fully examined by global creative professionals. This project explores the unique structure of the Japanese music industry, highlighting how it differs from other markets and offering insights into consumer behaviour and the overall ecosystem, supported by real case studies and data-driven analysis.



Osuke Matsuura

University for the Creative Arts, Music Business & Management - Year 3

Expert Perspective

To enrich this guide with a practical industry viewpoint, I reached out to a music business professional and asked:

"What do you consider to be the most defining characteristics of Japan's music market? How does it differ from other countries?"

"Established fandom businesses and cultures (e.g., fan clubs) are among the most defining characteristics. Therefore, building more direct-to-fan relationships and reducing reliance on traditional media by leveraging the latest technologies is essential. This will unlock greater freedom, particularly from excessively commoditized pricing shaped by media. Artists, who have traditionally been controlled by media or intermediaries, can take greater leadership and ownership of their businesses by leveraging direct relationships with fans and more flexible monetization models."



Takuya Yamazaki

Founder, Managing Partner at Field-R Law Office

"Field-R Law Offices is a boutique law firm that provides legal expertise in the fields of sports and entertainment law" includes music. (Field-R, 2025)

"What distinguishes the Japanese music market from other global markets is its ability to cultivate a comprehensive fan journey throughout an artist's career. Long before the global industry shifted its focus toward superfans or user-/artist-centric models, Japan had already placed fans at the core of its music ecosystem. Japan's distinctive A&R and promotional strategies exemplify a belief that music is not merely content, but an immersive experience to be lived; much like a personalized, context-driven playlist. As the industry fully embraces this mindset, I think there are significant growth opportunities that are likely to follow."



Jay Kogami

Music Ally Japan | Chartmetric

JAPAN'S MUSIC INDUSTRY: WHAT YOU NEED TO KNOW

Japan is the second-largest music market in the world, following the United States, with a recorded and digital music revenue of \$2.4 billion in 2022 (International Trade Administration, 2023).

Although Japan's population is less than half of the United States, some experts estimate that Japanese people spend nearly twice as much on music per person compared to Americans. (*Ibid.*)

This highlights its strong consumer culture and its unique market potential for global creatives and industry players.

In broader economic terms, Japan also holds the position as the fourth-largest economy in the world—behind the United States, China, and Germany—with a GDP of approximately £3.3 trillion in 2023, further underscoring the scale and stability of its consumer base. (World Bank, 2024)

TOP 5 MUSIC MARKET 2023 (IEPI, 2024)

1.	USA	
2.	JAPAN	
3.	UK	
4.	GERMANY	
5.	CHINA	

J-POP WILL BOOM

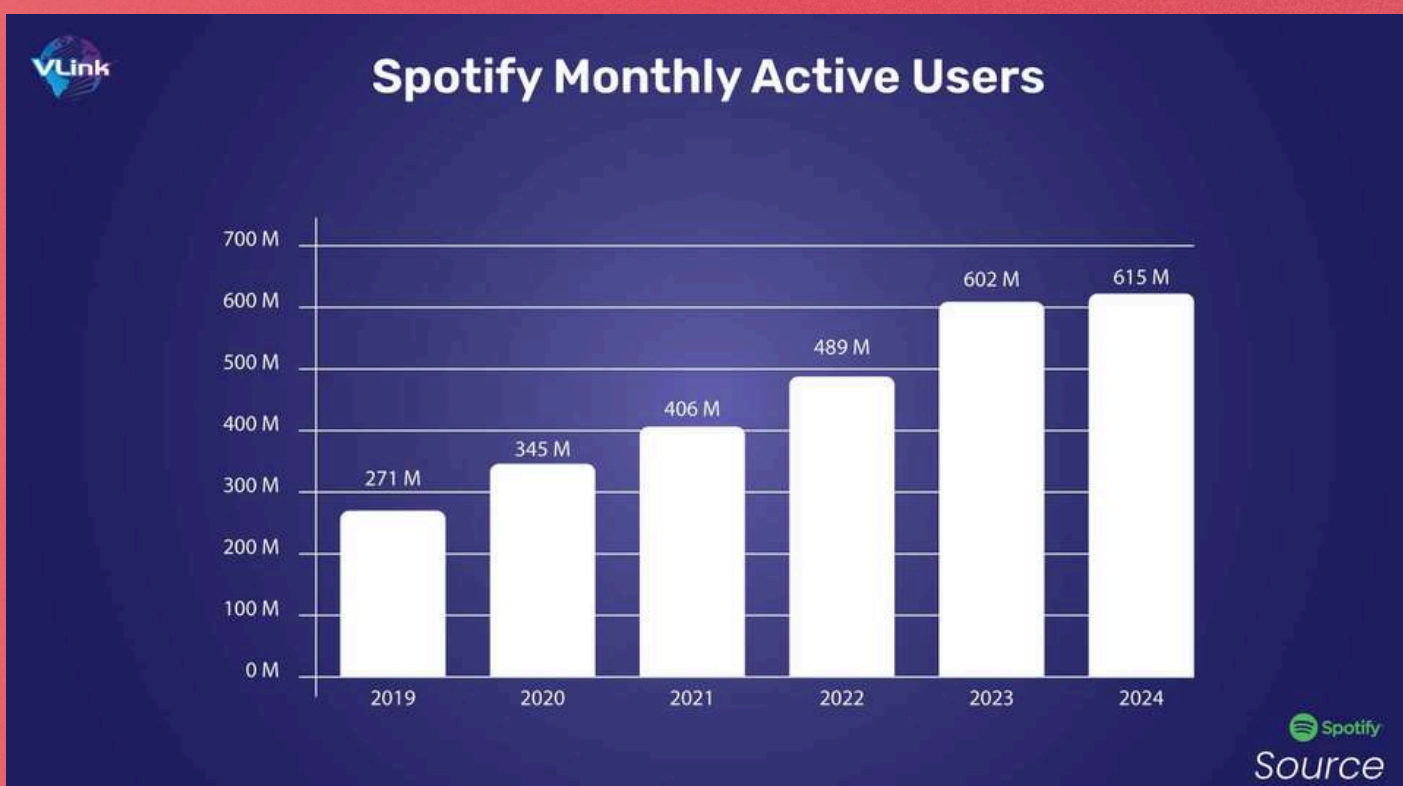
“Driven by collaborations and crossover successes that amplify its cultural presence, the vibrant J-Pop scene should become increasingly prominent within international music — inching closer to a global takeover.” (Jefferson, 2025)

Key Points:

- Japan accounts for a significant share of global music revenues, making it a crucial market for international expansion.
- Unlike many Western markets where streaming dominates, the market has a distinct balance between physical sales and digital streaming, which will be explained further on the next page.

J-POP WITHOUT BORDERS: THE GLOBALISATION OF JAPANESE MUSIC

In recent years, non-English songs have gained increasing global attention, driven by the rise of streaming services like Spotify and Apple Music, which allow listeners worldwide to access any music anytime. This shift has also enabled the global popularity of regional genres such as k-pop, afrobeats, and Música Mexicana, all of which have benefited from technological advancements and digital distribution platforms that transcend geographical boundaries.



According to Stassen from Music Business Worldwide (2024), Hindi and Japanese were the two languages that saw a rise in their share of the top 10,000 on-demand streaming songs globally in 2023.

“The growing market share of Japanese-language music such as J-Pop offers a unique insight into the shifting global streaming landscape, the multilingual tastes of music fans, and the growth of the streaming format in Japan itself, the world’s second-largest recorded music market.” (Ibid.)

UNDERSTANDING JAPAN'S MUSIC MARKET

Physical vs. Digital

Japan's music market stands out globally for its unique balance between physical and digital sales, maintaining a strong consumer culture that values tangible media while gradually embracing streaming.

The Japanese market differs notably from the U.S. and other countries. In 2022, streaming made up 84% of recorded music revenue in the U.S. (RIAA, 2022), while Japan continued to rely heavily on physical media. According to Believe (2023), 34% of total revenue came from digital formats, with physical formats accounting for 66%. This has led to a perception that streaming is less popular in Japan. However, the streaming sector has grown rapidly, increasing by 166% between 2018 and 2022.

Chart Analysis: How Data Reflects Market Preferences

Japan's music charts highlight the coexistence of physical and digital markets, reflecting distinct consumer behaviours and industry practices. While the Billboard JAPAN Hot 100 integrates data from physical sales, streaming, radio airplay, downloads, social media activity, and karaoke plays (Billboard Japan, 2025), the Oricon Chart puts greater emphasis on physical sales (ORICON NEWS, 2024).

Artists often release albums with exclusive bonuses like photo cards or event tickets, which drive sales and affect chart rankings. This has encouraged multi-buy strategies, where fan-driven purchases remain influential—even in the digital age.

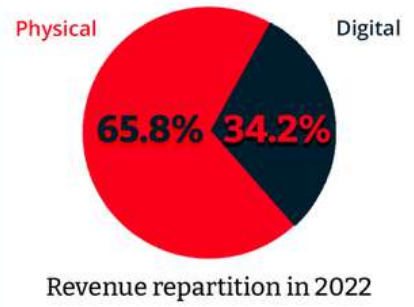
The Oricon chart is based on sales data from 17,562 stores nationwide, including CD shops, rental stores, bookshops, electronics retailers, convenience stores, speciality shops, and online retailers. It estimates sales figures for both domestic and imported albums (only albums are counted for imports) that have a JAN code (a barcode standard mainly used in Japan) and are sold domestically at a tax-inclusive price of 250 yen (£1.3) or more. Sales are tracked weekly from Monday to Sunday, with daily estimates aggregated into final weekly figures. (ibid.)

Streaming revenue growth



SOURCE: RIAJ

Physical format is still the main source of revenue



SOURCE: RIAJ



UNDERSTANDING JAPANESE MUSIC CONSUMERS

“Fans in Japan are particularly loyal to each artist, and many also have a collector’s mindset, making them partial to the physical product.”

Shunsuke Muramatsu

CEO of Sony Music Entertainment Japan (Stassen, 2023)

Japan’s music industry is heavily shaped by its unique consumer behaviours, where fandom extends beyond casual listening into deep emotional and financial investment. Unlike in many Western markets, where streaming dominates and album sales are often secondary, Japanese fans engage with music through a multi-faceted ecosystem of physical media, fan clubs, live events, and exclusive merchandise. For international artists and marketers looking to succeed in Japan, understanding these behaviours is essential.

The Culture of “Oshi-katsu”

One of the defining characteristics of Japanese music consumption is the strong presence of superfan culture. Fans don’t just passively listen to music—they actively support their favourite artists through financial contributions such as exclusive memberships, and participation in live events.

This phenomenon, known as “Oshi-katsu” (supporting your favourite), is deeply ingrained in Japanese fan culture and plays a crucial role in driving the country’s music economy.

According to Rakuten Insight (2023), "Domestic Idols" are the most popular category for Oshi-katsu, with 32.4% of participants engaging in this form of fandom. "Musicians/Bands" follow at 24.9%, while "Manga/Anime Characters" account for 18.1%. These figures highlight the diverse interests within Oshi-katsu culture and its widespread influence across different entertainment sectors.

A “Superfan” is a dedicated listener who spends more than the average fan on merchandise, music, and exclusive content, making them a highly valuable audience for artists and their teams. (Stassen, 2023)

Marketing Strategy for Superfans in Japan

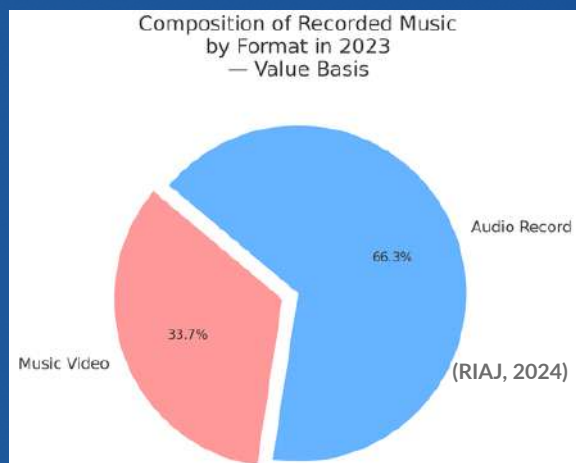
Fan Clubs

In Japan, artist engagement extends beyond social media through official fan clubs. These clubs, often requiring an annual fee, provide members with early ticket access, exclusive content, personalised messages, limited-edition merchandise, and premium concert seating. This structured approach fosters a deeper artist-fan connection.

Live Concert DVDs & Blu-rays

Despite the global shift toward digital streaming, Japan's music industry continues to see strong demand for physical concert recordings. Japanese concerts are often strictly ruled to not record the performance, making official DVD and Blu-ray releases one of the few ways for fans to see the concert experiences.

According to the Recording Industry Association of Japan (RIAJ, 2024), the sales of music video formats remain on an upward trend in 2023:



A total of 47.11 million units were sold, marking a 109% year-on-year increase.

Revenue reached approximately £39 million, growing 110% compared to the previous year.

Music Video: DVDs, Blu-ray discs, tapes, and others.

Audio Record: CDs, vinyl records, cassette tapes, and others.

Meet & Greet Events

Idol groups and pop artists in Japan frequently host meet & greet events, where fans have the opportunity to interact with their favourite performers through activities such as high-fives, handshakes, or photo sessions. Access to these events is typically granted through the purchase of CDs or merchandise, making them a key driver of physical sales. This strategy effectively incentivises bulk buying, as fans often purchase multiple copies to secure additional interaction time, significantly boosting overall sales figures.

Superfan Marketing Examples

Japan's music industry has built a highly successful model around superfans, who not only consume music but actively invest in physical products, immersive experiences, and exclusive interactions. Here are three examples of how major companies and artists cater to and capitalise on this dedicated consumer base.

1. Universal Music Group's "Superstore"

In 2024, Universal Music Group (UMG) launched UNIVERSAL MUSIC STORE HARAJUKU, a four-storey concept store in Tokyo's Harajuku District, specifically designed to strengthen artist-fan connections.

Unlike traditional record shops that stock products from various labels, this store is exclusively dedicated to UMG artists, offering fan experiences, exclusive merchandise, and pop-up retail spaces. (Stassen, 2023)



2. Fender's First-Ever Flagship Store in Tokyo

In a move that highlights Japan's love for physical music culture, Fender, one of the world's most iconic guitar brands chose Tokyo's Harajuku District as the location for its first-ever flagship store (Same location as UMG's superstore). The store is designed as a one-stop destination where both musicians and music fans can experience Fender beyond just instruments, featuring:

- Live event spaces for performances, workshops, and panel discussions.
- A dedicated merchandise and apparel line, "F IS FOR FENDER," exclusive to Japan.
- A 360-degree music experience tailored to Japan's deep appreciation for tangible, immersive music culture.

The decision to open the flagship store in Tokyo over Los Angeles, New York, or London further underscores Japan's status as a key market for superfans who prioritise music as both an art form and a lifestyle. (Ibid.)

Superfan Marketing Examples

3. ZUTOMAYO's Exclusive Fan Club: A Unique Membership Model



Japanese band ZUTOMAYO offers a distinctive take on the fan club experience with their membership programme, “ZUTOMAYO PREMIUM”. Unlike traditional fan clubs, which focus on blogs or digital newsletters, this membership is structured around a physical symbol of loyalty—a custom-made medal that fans must purchase to join.

Members enjoy a one-year access period with benefits such as:

- Surprise gifts, where selected members may receive ACA-NE's personal belongings or signed items alongside their store purchases.
- Priority ticket lotteries for concerts, including premium front-row seating.
- Priority access to merchandise and the right to purchase exclusive items.
- Concert attendance perks, including special stickers and a digital tour stamp to commemorate each show attended.
- Monthly downloadable voice messages from lead vocalist ACA-NE.

This collectible-driven fan club model reinforces long-term engagement by rewarding members with physical tokens of their loyalty. It reflects Japan's deep-rooted fan culture, where tangible goods and exclusive experiences play a crucial role in sustaining long-term artist-fan relationships. (ZUTOMAYO, 2025)



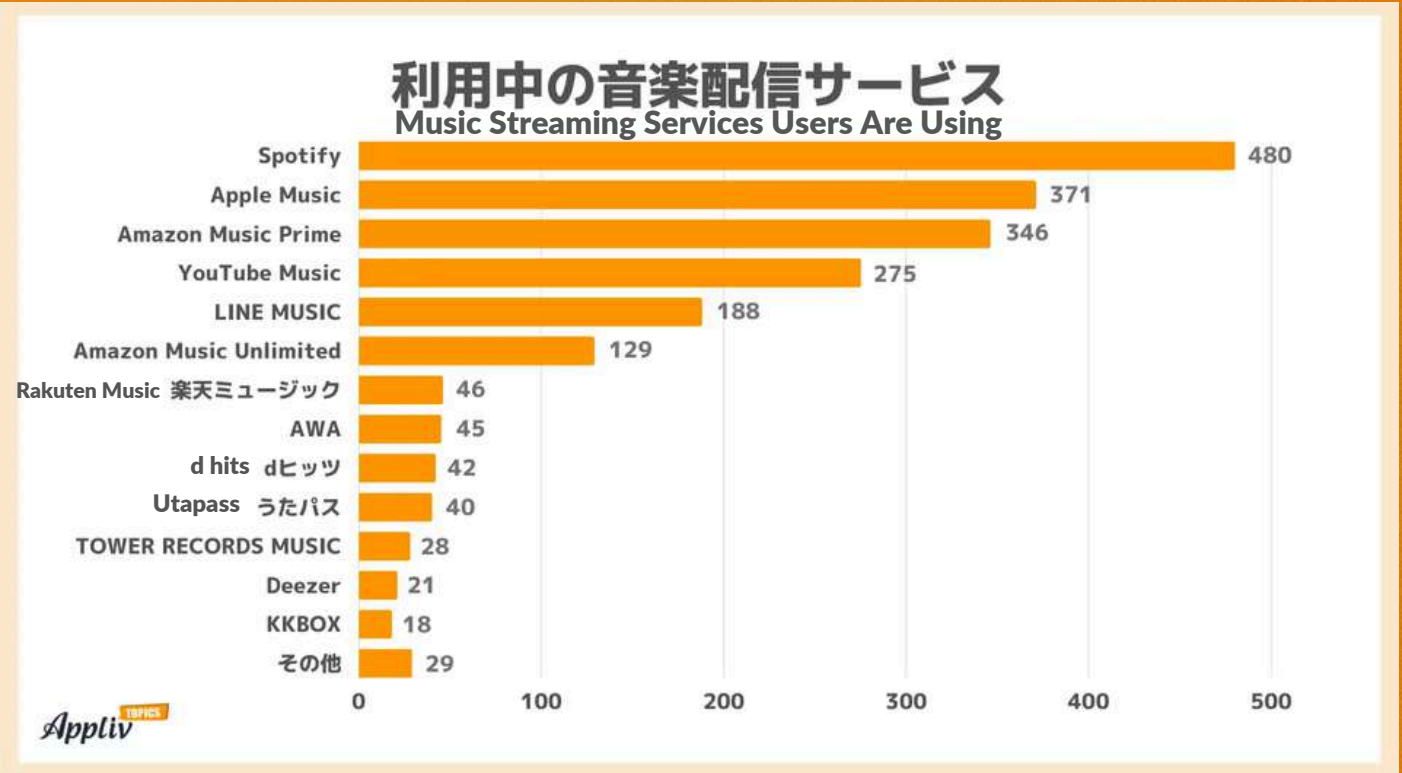
Key Takeaway:

These examples demonstrate how Japan's music industry thrives on engagement beyond streaming. Superfans drive demand for exclusive in-person experiences, collectable merchandise, and physical media, making Japan a crucial market for artists and brands. For international businesses looking to enter the market, understanding and leveraging this unique fan culture is essential for long-term success.

STREAMING ECOSYSTEM IN JAPAN

Japan's music streaming landscape is uniquely shaped by homegrown platforms that cater to local tastes and cultural nuances. While global services like Spotify and Apple Music operate in the market, domestic platforms such as LINE MUSIC and AWA, along with other niche services, retain some share. This section examines LINE MUSIC, highlighting its unique features and integration with the LINE ecosystem with real-world examples of international and domestic artists utilising LINE MUSIC for marketing and audience engagement.

Over 50% of LINE MUSIC users are young listeners. As a result, viral hits from TikTok, YouTube, and TV quickly impact its rankings. This makes LINE MUSIC "the go-to app for seeing the latest music trends in real-time," gaining attention from media and industry professionals alike. (Appliv TOPICS, 2023)



Appliv TOPICS (2023) conducted a survey on music streaming services from August 23 to August 30, 2023, targeting 2,614 men and women aged 15 to 69 in Japan through an online research service.

What's LINE?

LINE is a widely used messaging and social networking app, particularly popular in Japan, Taiwan, Thailand, and Indonesia. With over 224 million monthly active users globally, it plays a major role in digital communication. In Japan alone, where internet penetration reaches 84.9% of the population (104.4 million users as of March 2024), LINE boasts 96 million users, covering approximately 78.1% of the population. (DMFA, 2024)

LINE MUSIC is a subscription-based music streaming service that stands out for its seamless integration with the LINE messaging app. This unique feature allows users to personalise their experience by setting favourite songs as ringtones, profile background music, or chat room BGM. With a vast library spanning the latest hits and an extensive selection of Japanese music, LINE MUSIC particularly appeals to j-pop fans. The platform also offers high-quality music videos, exclusive live streams, and a karaoke mode with scoring features. (LINE MUSIC, 2025)

Use of LINE MUSIC in Music Marketing Campaign

TOMORROW X TOGETHER

In 2024, the Korean idol group TOMORROW X TOGETHER partnered with LINE MUSIC for a special promotion. Fans who streamed their new single over 700 times and created a playlist featuring the song had the chance to win an exclusive real-life meet & greet. Additionally, all participants received a limited-edition background image for the LINE messaging app. (LINE MUSIC, 2024)

ME:I

In 2024, Japanese idol group ME:I launched a LINE MUSIC campaign to celebrate the release of their digital single "Tomorrow." Fans who set the song as their LINE call ringtone, caller tune, or profile BGM and submitted proof (screenshot) through a campaign form were entered into a draw. Prizes included autographed solo polaroids from selected members for 10 winners and an exclusive group photo for all participants. (ME:I, 2024)

Taylor Swift

In 2019, Taylor Swift collaborated with LINE MUSIC to promote her album "Lover." The campaign encouraged fans to stream her song "ME!" from the album, offering exclusive fan meetings for the top 30 listeners. (Musicman, 2019)

These campaigns successfully boosted the artist's presence on the app charts, strengthened fan engagement, and helped reach a broader and more diverse audience.

TWO DECADES OF MUSIC INDUSTRY EVOLUTION: JAPAN & GLOBAL

2000 2001 2002 2003 2004 2005 2006 2007 2008 2009 2010 2011 2012



[Japan] Recochoku, launched in 2001, is a Japanese digital music distribution service that pioneered mobile music downloads. It provided a legal alternative for purchasing ringtones and full tracks, shaping Japan's mobile music market before the rise of streaming services. (Recochoku, 2021)



[Japan] Niconico, launched in 2006, became a major video-sharing platform in Japan, known for its unique real-time comment overlay feature. It played a significant role in music discovery, fan engagement, and the growth of Vocaloid culture. (Shuyapedia, 2024)



SNS Revolution

[Japan] LINE, launched in 2011, is a messaging app that quickly became Japan's dominant communication platform. (LINE, 2025)

Digitalisation Disrupts Music Industry



[Global] The launch years of major platforms in Japan: iTunes Store debuted in 2005, Twitter in 2008, Facebook in 2008 and Instagram in 2010 and became available in Japan in 2014.



[Global] Napster, an American peer-to-peer file-sharing service launched in 1999, revolutionised the music industry by allowing users to share and access music files for free, disrupting the traditional ecosystem. (Lamont, 2013)



[Global] Steve Jobs announced Apple's first iPhone on January 9, 2007. (Coulstring, 2024)



[Global] YouTube was founded in 2005 and launched its service in Japan in 2007. (HugKum. 2021)



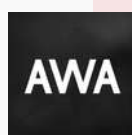
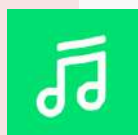
[Global] Myspace, a social networking site launched in 2003, played a key role in the music industry by allowing artists to share their music, connect with fans, and gain exposure, shaping the early era of digital music promotion. In 2006, Myspace also expanded into the Japanese market. (Smaholife. 2025)



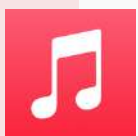
[Global] Spotify was developed in 2006 in response to the music industry's growing piracy problem. It launched its service in 2008 (BBC, 2018) and expanded into the Japanese market in 2016 (Spotify, 2021).

2013 2014 2015 2016 2017 2018 2019 2020 2021 2022 2023 2024 2025

Music Streaming Services Landed in Japan



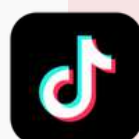
[Japan] In May 2015, the Japanese music streaming service AWA was introduced (Cyber Agent, 2024) , followed by the launch of LINE MUSIC in June of the same year (Xtech, 2015) .



[Global] Apple Music launched globally, including in Japan, in 2015. (Apple, 2015) On the other hand, as mentioned, Spotify began its service in Japan in 2016.

YouTube Music

[Global] YouTube Music, launched in 2018, is a dedicated streaming service offering music videos, playlists, and offline listening. It replaced Google Play Music and was introduced alongside YouTube Premium, which evolved from YouTube Red, providing an ad-free experience and exclusive content. (Snapes and Sweney, 2018)



[Global] TikTok was launched in 2016 by the Chinese company ByteDance. It gained global popularity after merging with Musical.ly in 2018. (BBC, 2020)

Pandemic



[Global] ChatGPT, developed by OpenAI, is an advanced AI chatbot capable of natural language understanding and generation. Launched in November 2022. (OpenAI, 2025)



AI Innovation

[Global] The generative AI music creation programme “Suno” produces realistic songs combining vocals and instrumentation. Founded by Mikey Shulman and his team, Suno became widely available in 2022 (Hiatt, 2024).



[Global] DeepSeek is a Chinese AI company founded by Liang Wenfeng in July 2023. In January 2025, they released the DeepSeek-R1 chatbot, which surpassed ChatGPT as the most downloaded free app on the U.S. iOS App Store by January 27, 2025. (BBC, 2025)

Short Form Video Era

Leading the way with TikTok, various major platforms have entered the short-video market such as Instagram Reels, YouTube Shorts, and LINE BOOM.

THE SOUND OF JAPAN: EXPLORING KEY TRENDS

In today's interconnected music landscape, Japan's industry is far from isolated—it absorbs global influences while actively shaping international trends. From anime-driven hits to the rise of Virtual YouTuber (VTuber) music, its unique cultural exports are making a growing global impact.

This section highlights key trends and case studies that show how Japan's music scene is evolving within an international context. These insights are essential for marketers, artists, and professionals aiming to engage with Japan and tap into its global potential.

Key Topics in This Section

Power of Anime in Music

This part explores anime's influence on the music industry—its role in global discovery, its impact on streaming trends, and notable case study collaborations between Japanese and international artists.

Beyond Reality: The Growth of VTuber Music

This section delves into the rise of VTuber music, its market growth, successful virtual artists, and their influence on global streaming. It also looks at leading agencies, regional expansion, and VTubers' role in reshaping the industry.

The Global Influence of Gaming & Music

This section explores the strong link between gaming and music, covering the rise of immersive soundtracks, global growth in-game music, and key collaborations between Japanese developers and international artists.

The Rise of Vocaloid Music

This section traces the evolution of Vocaloid's music, from a voice synthesis tool to a global trendsetter in music. This section highlights its influence on modern j-pop, international reach, and how new AI-powered tools are creating fresh opportunities for artists.



Power of Anime in Music

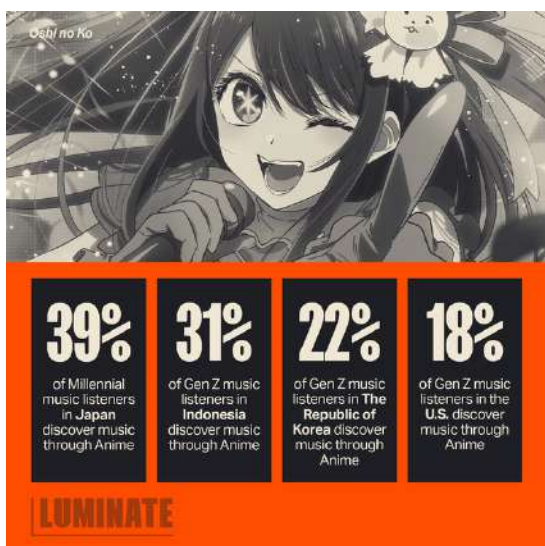
Anime is one of Japan's most influential cultural exports, with its industry generating approximately £17 billion in revenue in 2023, both domestically and internationally (Statista, 2025). As the demand for anime continues to grow, Grand View Research (2024) forecasts a 9.8% compound annual growth rate (CAGR) from 2025 to 2030.

This surge in popularity presents significant opportunities for musicians. Anime openings and endings serve as a powerful gateway for artists to reach global audiences. Recognising this potential, Warner Music Japan (WMJ) and NBCUniversal Entertainment Japan (NBCUJ) have formed a strategic partnership to capitalise on the expanding anime-music market (Tencer, 2024).

A study by Luminate (Marconette, 2023) highlights anime's role in music discovery:

- 18% of Gen Z music listeners in the U.S. find new music through anime.
- 22% in South Korea, 31% in Indonesia, and 39% in Japan also discover music via anime.

This impact is also evident in global music charts. In June 2023, YOASOBI's "Idol", the opening theme for Oshi no Ko, became the first Japanese-language song to reach No.1 on the Billboard Global Excl. U.S. Chart, surpassing international stars like Bad Bunny and Miley Cyrus (Trust, 2023). Similarly, in early 2024, Creepy Nuts' "Bling-Bang-Bang-Born", an opening song for the anime "MASHLE" debuted at No. 8 on the Global Japan Songs Excl. Japan chart, highlighting the growing reach of anime music outside Japan (Billboard Japan, 2024).



billboard GLOBAL EXCLUDING UNITED STATES	
SONG	ARTIST
1 Idol	YOASOBI
2 Cupid	Fifty Fifty
3 La Bebe	Yng Lvcas x Peso Pluma
4 Flowers	Miley Cyrus
5 Ella Baila Sola	Eslabon Armado X Peso Pluma
6 Where She Goes	Bad Bunny
7 Un X100to	Grupo Frontera & Bad Bunny
8 Calm Down	Rema & Selena Gomez
9 Die For You	The Weeknd & Ariana Grande
10 Daylight	David Kushner

chart dated June 10, 2023

Case Study: Kaiju No. 8

A notable example of leveraging the strong connection between anime and music is the collaboration seen in the opening and ending themes of Kaiju No. 8, which exemplify this trend by featuring Western artists YUNGBLUD and OneRepublic—an uncommon collaboration in the anime industry.

YUNGBLUD's *Abyss*, co-written with Imagine Dragons' Dan Reynolds, delivers a high-energy alternative rock anthem reflecting the emotional turmoil of protagonist Kafka Hibino. The song has resonated deeply with global audiences, earning praise from anime enthusiasts and music critics alike.

Meanwhile, OneRepublic's *Nobody* offers a lighter, uplifting contrast, aligning with the show's themes of resilience and camaraderie. The track has gained traction on social media, inspiring users to create videos reflecting personal moments of friendship and nostalgia.

This collaboration underscores anime's growing role in global music trends, providing a platform for mainstream artists to engage diverse audiences, foster cross-cultural connections, and expand their reach worldwide. (udiscovermusic.jp, 2024)



Beyond Reality: The Growth of VTuber Music

What Are VTubers?

The term “VTuber” was first introduced by Kizuna AI, a pioneer who debuted on YouTube in 2016 from Japan. Her highly humanlike 3D avatar connected with fans—primarily in Japanese—through livestreams and virtual vlogs. (Chandonnet, 2024)

According to Market Research Future (2025), the VTuber market is projected to grow from £2 billion in 2024 to £15.5 billion by 2035, with an estimated CAGR of 20.59% over that period.

This rapid growth has created new opportunities for artists and record labels. VTuber-generated music has risen in popularity, with many virtual artists gaining millions of streams.

On holoTune (2025), a dedicated chart showcasing music releases from a VTuber agency hololive, fans can explore the latest hits from the agency’s talents. Topping the chart is Hoshimachi Suisei’s “BIBIDEBA,” released in March 2024, which went viral thanks to its distinctive music video and UGC-driven dance trend. As of March 21, 2025, the song had surpassed 120 million views on YouTube. (Suisei Channel, 2024)

Virtual YouTubers, or VTubers, have become a significant trend in the online content creation world. With their engaging personas and digital avatars, VTubers can connect with audiences in unique ways. (Harris, 2024)



Kizuna AI



VTubers in the Global Music Market

VTubers have not only revolutionised content creation but have also become full-fledged music artists. Leading agencies like hololive have nurtured talents who release original songs, albums, and hold live concerts.

Their influence now extends far beyond Japan, with the global rise of hololive English and hololive Indonesia.

“hololive production is a VTuber management group that consists of the talent groups hololive and HOLOSTARS. hololive production has over 80 affiliated talents active in Japan, Indonesia, and English-speaking countries, and has over 80 million YouTube subscribers all across the channels.” (hololive, 2025)

International VTubers like Mori Calliope and Gawr Gura have released original music that charts globally and garners millions of streams. Notably, in 2024, Mori Calliope’s album debuted at No. 9 on Billboard’s Album Sales Chart (Caulfield, 2024).

Regional Insights on the VTuber Market

According to Market Research Future (2025), the VTuber market is expanding rapidly across regions:

- North America: Valued at £580 million in 2024, projected to reach £4.6 billion by 2035, driven by high digital content consumption and strong engagement.
- Europe: Estimated at £425 million in 2024, growing to £3.5 billion by 2035, with rising interest across varied demographics.
- Asia-Pacific: The leading region, starting at £775 million in 2024 and expected to hit £6.2 billion by 2035, supported by strong demand for anime, gaming, and digital entertainment.
- South America: Though smaller, it shows promise—growing from £116 million in 2024 to £930 million by 2035 due to increasing digital engagement.
- Middle East & Africa (MEA): Still emerging, with £77 million in 2024 expected to rise to £232 million by 2035—offering future growth potential.



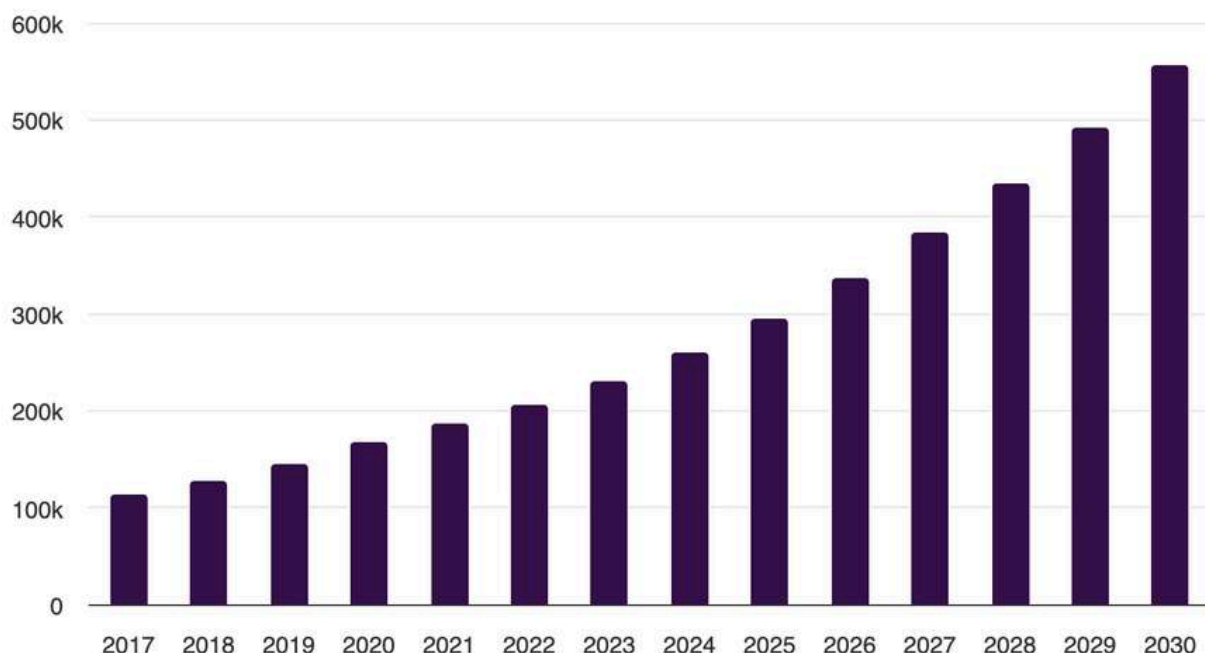
The Global Influence of Gaming & Music

The video game industry has seen significant expansion over the past decade. In 2023, its global market was valued at approximately £180 billion, with forecasts predicting growth to £430 billion by 2030, at a projected CAGR of 13.4% between 2024 and 2030 (Grand View Research, 2023).

Similarly, the video game music sector is experiencing rapid development. Business Research Insights (2025) estimated its market value at around £1.3 billion in 2023, with expectations that it will nearly double to £2.5 billion by 2033.

This growth presents substantial opportunities for composers and musicians, as demand for high-quality game soundtracks continues to rise. The increasing popularity of mobile gaming and e-sports serves as a key driver, emphasising the importance of immersive music in enhancing the overall gaming experience (Ibid.).

Global video game market, 2017-2030 (US\$M)



“Good game music has to fit in with gameplay, as well as connecting with the visuals. When the two come together, it can really contribute to a game’s overall success” (audio network, 2023)

Case Study: Death Stranding



A compelling example of the strong link between gaming and music is seen in Death Stranding.

Developed by legendary Japanese game director Hideo Kojima—also known for the Metal Gear Solid series—Death Stranding is a genre-defying open-world adventure (PlayStation, 2025). Praised for its innovative gameplay and narrative, the game was nominated for multiple awards at The Game Awards 2019, winning Best Game Direction (IMDb, 2019).

The game's cinematic atmosphere was elevated by its original soundtrack, Timefall, featuring renowned global artists such as Major Lazer, Bring Me The Horizon, CHVRCHES, Alan Walker, and Khalid (Sony Music, 2019).

Among these contributions, Bring Me The Horizon's "Ludens" stood out as a major success, with its music video surpassing 42 million views on YouTube. (Bring Me The Horizon, 2019) Following the same month the album was released, the band successfully held multiple live performances, and fan events in Japan (Sony Music, 2019)

This collaboration exemplifies how Japanese game studios effectively partner with Western artists, bridging the gap between gaming and global music. As both industries grow, such partnerships enhance user experiences and foster broader international engagement—highlighting the potential for future cross-industry innovation.



The Rise of Vocaloid Music

What is a Vocaloid?

The term Vocaloid is widely used in various contexts today. It often refers to Vocaloid music and Vocaloid music producers. However, at its core, Vocaloid is both a technology and a software system developed by Yamaha Corporation, a Japanese multinational corporation, in 2003. (Yamaha, 2023)

Vocaloid is a singing voice synthesis technology and software that allows users to create vocal tracks simply by inputting lyrics and melodies. It eliminates the need for live vocal recordings, functioning like a virtual singer inside a computer. With just a PC and the software, users can generate high-quality vocal performances.

One of the most pivotal moments in Vocaloid history occurred in 2007 when the Japanese tech company Crypton Future Media introduced Hatsune Miku. Unlike earlier Vocaloid voicebanks, Miku was not only a voice but also a fully realised character with a unique personality and visual identity. This approach propelled her to global fame, transforming her into a cultural icon. Today, she continues to be the face of Vocaloid culture, appearing in concerts, brand collaborations, and digital media worldwide. (ibid.)

According to Billboard Japan, artists such as YOASOBI, Ado, Kenshi Yonezu, Tatsuya Kitani and Yorushika—who have gained popularity both in Japan and internationally—share roots in Vocaloid culture. (Billboard Japan, 2022)

In the same article, Japanese music journalist Tomonori Shiba states:

"Nowadays, it is impossible to discuss the current trends in J-POP without acknowledging the influence of Vocaloid." (ibid.)



"The emergence of Hatsune Miku, a Japanese-developed virtual singer characterized by the artificial voice synthesis software by Crypton Future Media, has symbolized a pivotal shift in the music industry, characterized by the deconstruction of popular culture for individualism in musical expression" (Chen, 2024)

The Global Potential of Vocaloid Music

With ongoing technological advances, Vocaloid music is becoming increasingly viable worldwide, opening new doors for both Japanese and international artists.

In late 2022, Yamaha released VOCALOID6, the latest version of its renowned singing voice synthesis software. Its promotional video showcased impressively natural harmonies, with male and female voices singing fluidly in both Japanese and English. (Yamaha, 2023)

One of VOCALOID6's most notable features is its ability to handle multilingual lyrics within a single voicebank—supporting Japanese, English, and Chinese. The new VOCALOID:AI Engine has further enhanced vocal realism, making digital singers sound more expressive and lifelike than ever.

Another innovation is the “Take” function, which simplifies harmony creation, while improved editing tools allow precise control over accents, vibrato, and vocal nuances.

The most revolutionary addition is VOCALO CHANGER, which enables users to transform their own recorded vocals into a Vocaloid-style performance using AI-powered voicebanks. This feature bridges the gap between human and synthetic singing, expanding creative possibilities for musicians worldwide (ibid.).

As the technology evolves, Vocaloid's global market potential grows. These advancements reduce barriers for international creators to explore Vocaloid culture, potentially using it as a gateway into Japan's music industry.

With over 20 years of evolution, Vocaloid has now become a powerful tool not just for Japanese creators, but for global artists, producers, and marketers looking to connect with Japan's music scene and beyond.



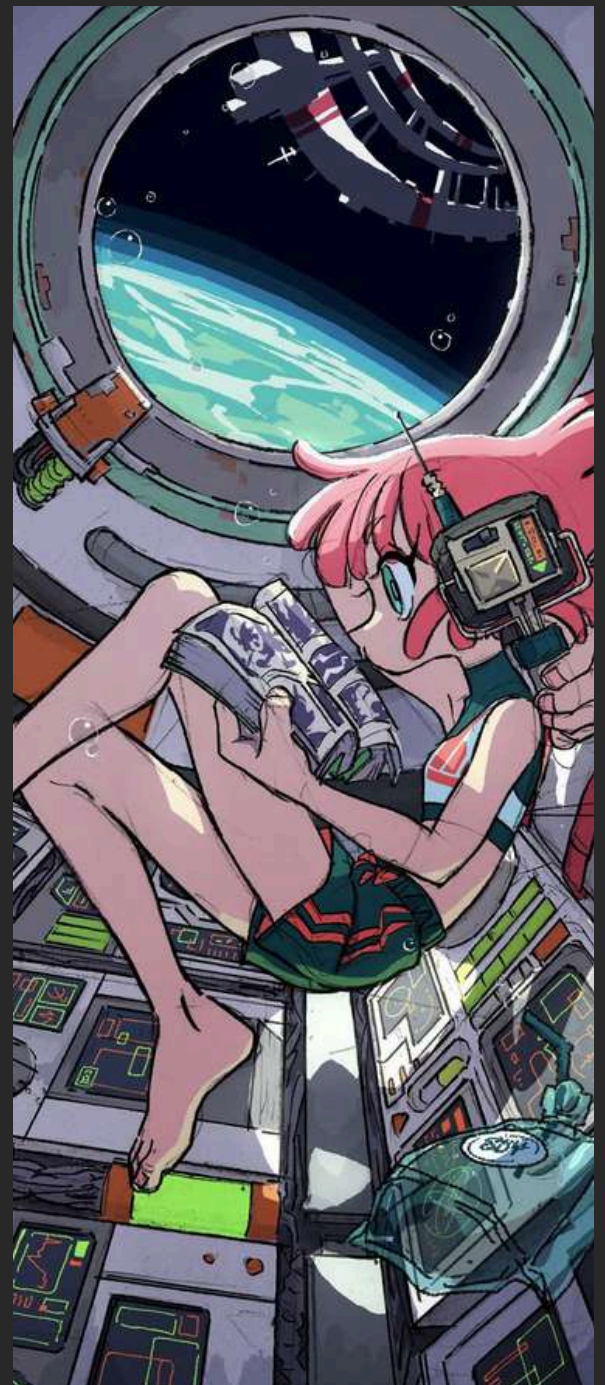
Summary

Japan's music industry stands as a unique and complex ecosystem, shaped by a blend of tradition and innovation. Despite being the world's second-largest music market, it remains distinct from its Western counterparts due to its strong physical media culture, deep-rooted fan engagement, and the influence of anime, gaming, and VTuber trends.

While streaming continues to rise, Japan's approach to music consumption prioritises exclusivity, collectability, and immersive fan experiences. This has created a market where superfans play a crucial role in driving sales through merchandise, concerts, and membership-based interactions. International artists looking to succeed in Japan must navigate these cultural nuances while adapting to local platforms and promotional strategies.

As Japan's music scene becomes increasingly interconnected with global trends, its impact on international music culture is growing. From j-pop breaking into global charts to AI-powered Vocaloid and VTuber music reshaping the industry, Japan is both an innovator and a cultural bridge between markets.

Understanding the unique characteristics of Japan's music industry is essential for those looking to engage with it—whether as artists, businesses, or researchers. With its continued evolution, Japan presents an ever-expanding landscape of opportunities for the future of global music.





RESEARCH AND DEVELOPMENT LOG

A critical analysis of my research approach and methods used

Researching the Japanese music market posed challenges, as many sources were available only in Japanese. I made a conscious effort to accurately localise this information into English while preserving the original meaning. To support my claims, I used reliable data and relevant statistics, including future forecasts.

I remained committed to the concept of my work, “a guideline of the Japanese Music industry for global creatives.” As such, I prioritised recent case studies—particularly marketing campaigns by international artists in Japan—to ensure the examples were timely and valuable for readers.

For primary research, I interviewed a co-worker from Music Ally, where I have worked since my internship in Year 2. He is a lawyer and business advisor at the company, specialising in the Japanese market, and has spoken at multiple international music business conferences. His insights provided a practical perspective and strengthened the guide’s credibility. I also asked him to review the final deliverables and offer feedback.

One limitation I faced was the timing of the latest IFPI Global Music Report, released in mid-March. While I regularly relied on the previous year’s edition due to its reliability and comprehensive scope, most of my research was completed before the new data was available. Fortunately, key insights—such as Japan’s position in the top three global music markets—remained consistent, allowing me to retain most of my findings without major revision.

Key insights that led to my solution, and how I developed it

Despite Japan being the world’s second-largest music market (IFPI, 2024), it is rarely featured in global industry discussions, conferences, or even on platforms like Music Ally or Music Business Worldwide. This shows how domestically focused and self-contained the Japanese music ecosystem remains—but also reveals untapped potential, especially for international artists and professionals seeking new markets.

As I developed the guide, I saw how underexplored and uniquely structured the Japanese industry is. The more I researched, the more I recognised its richness and the opportunities it holds for global creatives. This became central to my project’s direction. Through the guide, I aim to offer not only a clearer understanding of Japan’s music ecosystem but also highlight the business potential for those engaging with it on its own terms.

Alternative ideas and prototypes I explored

During the early stages of development, I drafted a full page focused on the international demand for Japanese music. However, upon revisiting the key concept of my project,” a guideline of the Japanese music industry for global creatives,” I realised that this direction did not align closely with the core objective. As a result, I decided to remove the page entirely.

J-POP GOING GLOBAL **BREAKING BARRIERS: FROM METAL TO POP SENSATIONS**

Japanese artists from various genres have successfully crossed borders, proving the global appeal of Japan's diverse music scene. One of the leaders in this movement was the metal idol group BABYMETAL, who in 2016 became the first Japanese act to headline a solo concert at London's iconic Wembley Arena. (Billboard Japan, 2016) Their fusion of heavy metal and J-pop aesthetics created a global fanbase that shattered cultural expectations.

Wembley has since welcomed other major Japanese acts such as X JAPAN and ONE OK ROCK. In 2025, J-Pop continues its global expansion with the pop duo YOASOBI announcing their first-ever solo concert in Europe, scheduled for June. The initial show sold out almost instantly, prompting the addition of a second date the very next day to meet soaring demand. (NiEW, 2025) YOASOBI was the most-streamed Japanese artist outside Japan on Spotify since 2023. (NiEW, 2024)



The O2 Arena in London, one of Europe's largest venues, is becoming a major hub for Japanese artists in 2025. In May, BABYMETAL is set to return (The O2, 2025). Following closely in June, Ado—known for her powerful vocals and anime collaborations—will take the stage (The O2, 2025). Despite never revealing her face publicly, Ado has built a massive global following, becoming the second most-streamed Japanese artist internationally, right behind YOASOBI. (NiEW, 2023&2024)



Why This Matters: Opportunities for Global Marketers

The growing international success of Japanese artists is more than just a trend—it signals a shift in the global music landscape. For international marketers and industry creatives, this represents a significant opportunity:

Diverse Fanbases: Japanese artists often attract multi-genre audiences, from metalheads to anime fans to mainstream pop listeners.

Cross-Media Potential: With many artists tied to anime, gaming, and VTuber culture, there are natural synergies for brand partnerships and cross-industry campaigns.

High Engagement: Japanese fan culture is known for its deep loyalty and strong merchandise sales, offering high-value markets for global tours, exclusive releases, and collaborations. This will be explored in more detail in the upcoming "Understanding Japanese Music Consumers" section.

I also considered exploring two additional topics. First, the international resurgence of interest in 80s-inspired Japanese content, particularly through YouTube and Spotify, such as the influence of city-pop. Second, merchandising and marketing content strategies within the Japanese domestic market. They were ultimately set aside due to word count limitations in the main deliverable.

CRITICAL SELF-REFLECTION ON PERSONAL & PROFESSIONAL DEVELOPMENT

Creating this project was a significant milestone in my academic journey at UCA, and I was able to provide a meaningful way to consolidate the skills I've developed throughout my degree. I applied both secondary and primary research methods with confidence, drawing on previous coursework and industry experience. Scheduling the development plan timeline also played a key role in managing the project.

Feb

6th: I created a cover page, Editor's Note section. I was also getting Inspiration for the whole design concept.

19th: I came up with the outline and concept of the project

20th: I created the page "Japan's Music Industry: What You Need to Know"

22nd: I created the page "j-pop going global Breaking Barriers: From Metal to Pop Sensations" (Later I decided to delete the section)

24th: I created the page "Understanding Japan's Music Market"

25th: I created the page "Streaming ecosystem in Japan"

Mar

6th: I created the page "Understanding Japanese Music Consumers"

12th: I had my first tutorial with a supervisor after my previous one left UCA.

14th to 17th: I created the section "Two Decades of Music Industry Evolution: Japan & Global"

18th: I created the page "The Sound of Japan: Exploring Key Trends"

19th: I created the page "Power of Anime in Music"

21st: I created the page "Beyond Reality: The Growth of VTuber Music"

24th: I created the page "The Global Influence of Gaming & Music"

25th: I created the page "The Rise of Vocaloid Music"

26th: I double checked the word count, contents and its structure. I created the page "Summary" and came up with questions for the p@rimary research (interview)

Apr

1st: I had my second tutorial with a supervisor.

4th: I revised and reviewed my own work and had minor adjustments. I sent out my interview questions to industry professionals. (primary research)

10th & 11th: I finalised the design. I adjusted the word count. I revised the grammar. I created the pages "Expert Perspective" and "Table of Contents"

15th: I finished referencing all the sources.

This allowed me to track progress and maintain motivation. On the design side, the visual layout went through multiple iterations before reaching the final version. I aimed to ensure that the report was not only informative but also visually engaging and easy to navigate. I incorporated charts and imagery to support the reader's understanding.

Fortunately, I did not face any major issues, however, one minor challenge was the broadness of my topic, "A Guideline for the Japanese Music Industry." Narrowing it down and selecting which case studies or topics to include was time-consuming, especially within the word count limits. Some researched ideas had to be cut. I also needed to critically assess whether the case studies I featured would feel relevant and actionable to international readers. This evaluative process helped sharpen the final concept and build a more focused guide.

This project has deepened my understanding of Japan's music industry and will directly inform my career development. From July, I will start my full-time work in the Japanese music industry, and the insights I gained through this project have already enhanced my ability to view the industry from a broader, globalised perspective. For the future, I hope to contribute to the Japanese music industry's global outreach by applying the knowledge and cultural insight I've gained through this project.

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