NIELSEN ENTERTAINMENT
Unparalleled Expertise

Using our broad and deep expertise to help you succeed

MUSIC
Nielsen Entertainment is the leader in music consumer research. Our team has been a trusted name in music and entertainment for over 30 years.

BRAND PARTNERSHIP
We advise some of the biggest names in sponsorship, managing global portfolios for Fortune 500 companies across music, sports and entertainment.

GLOBAL
Our subject matter experts provide the insights and support you need to grow your business in over 30 international markets.
Nielsen Music is the leading insights provider for the music industry across:

- Record Labels
- Artist Management
- Streaming Providers
- Live Event Producers
- Talent Agencies
- Publishing Rights Organizations

And Brand Sponsors in the music marketing industry
U.S. DANCE MUSIC
CONSUMER LANDSCAPE
SNAPSHOT OF THE U.S. DANCE MUSIC LANDSCAPE

In 2016 the genre remained stable in share of overall consumption across all formats

DANCE IS STREAMING FOCUSED

On-demand audio streaming accounts for more than half of the genre’s overall consumption, considerably more (+50%) than the industry norm.

% OF CONSUMPTION OF GENRE BY FORMAT TYPE (EQUIVALENTS)

- PHYSICAL ALBUMS: 7% (INDEX: 26)
- DIGITAL ALBUMS: 14% (INDEX: 74)
- DIGITAL TRACKS: 22% (INDEX: 138)
- ON-DEMAND (AUDIO) STREAMING: 57% (INDEX: 150)

*index relative to overall industry format composition*

DANCE MUSIC - 2017 YEAR-TO-DATE

Streaming not performing as strongly as the total U.S. market

<table>
<thead>
<tr>
<th>TOTAL MARKET YTD % CHANGE</th>
<th>DANCE MUSIC GENRE YTD % CHANGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017 YTD VS 2016 YTD</td>
<td>2017 YTD VS 2016 YTD</td>
</tr>
<tr>
<td>Albums w/TEA w/SEA On-Demand</td>
<td>+10.6%</td>
</tr>
<tr>
<td>Overall Albums</td>
<td>-18.2%</td>
</tr>
<tr>
<td>Digital Tracks</td>
<td>-23.3%</td>
</tr>
<tr>
<td>ON DEMAND AUDIO STREAMING</td>
<td>+40.0%</td>
</tr>
<tr>
<td>Albums w/TEA w/SEA On-Demand</td>
<td>+9.2%</td>
</tr>
<tr>
<td>Overall Albums</td>
<td>-10.7%</td>
</tr>
<tr>
<td>Digital Tracks</td>
<td>-24.8%</td>
</tr>
<tr>
<td>ON DEMAND AUDIO STREAMING</td>
<td>+34.4%</td>
</tr>
</tbody>
</table>

Source: US Nielsen Music Connect – YTD at Sept 7 2017
How We Did It - Methodology

Engagement with Dance Music in APAC

Who Are Dance Music Listeners?

How to Reach Dance Music Listeners
NIELSEN ASIA-PACIFIC DANCE MUSIC STUDY

Methodology

DATA COLLECTION

2017 marked the inaugural Nielsen Asia-Pacific Dance Music Study: a snapshot study of consumer interaction with music in the APAC region.

Interviews were conducted online from September 1 - 7, 2017.

SAMPLE

Final sample counts for the countries included in the study were as follows:

Australia: n = 1,016
China: n = 1,101
Japan: n = 1,004
Korea: n = 1,007
Taiwan: n = 1,004
KOREANS MOST LIKELY TO LISTEN TO DANCE MUSIC…

% Respondents Who Listen to Dance Music

KOREA: 74%
CHINA: 64%
TAIWAN: 64%
AUSTRALIA: 49%
JAPAN: 35%
...AND MOST LIKELY TO BE DEDICATED LISTENERS.

Dance Music Listeners by Engagement Level

Nielsen Asia-Pacific Dance Music Study 2017
Q. How often, if ever, do you listen to each of the following types of music?
Base: Total China Respondents (1101), Total Australia Respondents (1016), Total Taiwan Respondents (1004), Total Korea Respondents (1007), Total Japan Respondents (1004)
DANCE MUSIC CRACKS THE TOP FIVE EXCEPT IN JAPAN

Dance Music Ranking by Country

#2 KOREA
#5 CHINA
#5 TAIWAN
#4 AUSTRALIA
#6 JAPAN

Nielsen Asia-Pacific Dance Music Study 2017
Q. How often, if ever, do you listen to each of the following types of music?
Base: Total China Respondents (1101), Total Australia Respondents (1016), Total Taiwan Respondents (1004), Total Korea Respondents (1007), Total Japan Respondents (1004)
AUSTRALIAN DANCE MUSIC LISTENERS ARE MORE LIKELY TO BE FEMALE

Gender of Dance Music Listeners - Indexed to Average Music Listener

**Nielsen Asia-Pacific Dance Music Study 2017**

Q. Are you...

Base: Dance Music Listeners China (705), Dance Music Listeners Australia (495), Dance Music Listeners Taiwan (641), Dance Music Listeners Korea (744), Dance Music Listeners Japan (356)
AUSTRALIAN DANCE MUSIC LISTENERS MORE LIKELY TO BE MILLENNIAL

% of Dance Music Listeners who are Millennials Indexed to Average Music Listener

Nielsen Asia-Pacific Dance Music Study 2017
Q. Are you...
Base: Dance Music Listeners China (705), Dance Music Listeners Australia (495), Dance Music Listeners Taiwan (641), Dance Music Listeners Korea (744), Dance Music Listeners Japan (356)
HOW MUCH MONEY IS SPENT ON LIVE MUSIC?
### LIVE MUSIC EVENT SPEND ACROSS THE GLOBE

**Music Listeners’ Annual Live Music Spend (Share of Music Wallet)**

<table>
<thead>
<tr>
<th>Country</th>
<th>Admission To Live Music Concerts</th>
<th>Admission to DJ Event</th>
<th>Admissions To Music Festivals</th>
<th>Cover To Small Live Music Sessions</th>
</tr>
</thead>
<tbody>
<tr>
<td>China</td>
<td>65%</td>
<td>26%</td>
<td>15%</td>
<td>11%</td>
</tr>
<tr>
<td>Taiwan</td>
<td>63%</td>
<td>25%</td>
<td>14%</td>
<td>9%</td>
</tr>
<tr>
<td>Canada</td>
<td>59%</td>
<td>31%</td>
<td>8%</td>
<td>8%</td>
</tr>
<tr>
<td>US</td>
<td>58%</td>
<td>36%</td>
<td>9%</td>
<td>8%</td>
</tr>
<tr>
<td>Japan</td>
<td>56%</td>
<td>34%</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>Korea</td>
<td>55%</td>
<td>19%</td>
<td>12%</td>
<td>12%</td>
</tr>
<tr>
<td>Australia</td>
<td>40%</td>
<td>18%</td>
<td>6%</td>
<td>4%</td>
</tr>
</tbody>
</table>

**Base:**
- Music Listeners China (913), Music Listeners Australia (859), Music Listeners Taiwan (827), Music Listeners Korea (895), Music Listeners Japan (776), US Music Listeners (2221), Canada Music Listeners (1206)
MUSIC LISTENERS’ ANNUAL LIVE MUSIC SPEND
(All US$)

- China: $128
- Taiwan: $109
- Australia: $98
- US: $97
- Canada: $96
- Japan: $76
- Korea: $44

Q. Thinking about the past 12 months, about how much money did you spend on the following entertainment activities?
Base: Music Listeners China (913), Music Listeners Australia (859), Music Listeners Taiwan (827), Music Listeners Korea (895), Music Listeners Japan (776), US Music Listeners (2221), Canada Music Listeners (1206)
HOW DO PEOPLE DISCOVER NEW MUSIC?
DIGITAL OUTLETS MATTER MOST IN KOREA AND CHINA

Dance Music Listeners Modes of Music Discovery

KOREA
- Playlists on Music Streaming Services (50%)
- TV Show (not music competition show) (44%)

CHINA
- Online Audio or Video Music Websites / Apps (56%)

TAIWAN
- Movies / Movie Soundtracks (57%)
- TV Show (not music competition show) (53%)

AUSTRALIA
- Listening to AM/FM Radio ‘Over the Air’ (64%)
- Friends / Relatives (50%)

JAPAN
- TV Show (not music competition show) (44%)
- Listening to AM/FM Radio ‘Over the Air’ (37%)

Q. Which of the following ways do you discover new music?
Base: Dance Music Listeners China (705), Dance Music Listeners Australia (495), Dance Music Listeners Taiwan (641), Dance Music Listeners Korea (744), Dance Music Listeners Japan (356)
TOP SERVICES WITH DANCE MUSIC LISTENERS

Dance Music Listeners Use Of Online Music Services

<table>
<thead>
<tr>
<th>Country</th>
<th>Service</th>
<th>Usage Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Korea</td>
<td>YouTube</td>
<td>78%</td>
</tr>
<tr>
<td></td>
<td>Apple Music</td>
<td>69%</td>
</tr>
<tr>
<td>China</td>
<td>YouTube</td>
<td>80%</td>
</tr>
<tr>
<td></td>
<td>Kfndle Music</td>
<td>77%</td>
</tr>
<tr>
<td>Taiwan</td>
<td>YouTube</td>
<td>94%</td>
</tr>
<tr>
<td></td>
<td>Kfndle Music</td>
<td>53%</td>
</tr>
<tr>
<td>Australia</td>
<td>YouTube</td>
<td>67%</td>
</tr>
<tr>
<td></td>
<td>Spotify</td>
<td>43%</td>
</tr>
<tr>
<td>Japan</td>
<td>YouTube</td>
<td>87%</td>
</tr>
<tr>
<td></td>
<td>Spotify</td>
<td>40%</td>
</tr>
</tbody>
</table>

Nielsen Asia-Pacific Dance Music Study 2017
Q. Which of the following online music services, if any, have you used in the past 12 months?
Base: Dance Music Listeners China (705), Dance Music Listeners Australia (495), Dance Music Listeners Taiwan (641), Dance Music Listeners Korea (744), Dance Music Listeners Japan (356)
CONSUMER PROFILES
MEET ZHANG WEI FROM CHINA

WHO IS HE?
• 40 years old
• ~188k 元 in HH Income

HOW DOES HE INTERACT WITH MUSIC?
• He discovers new music via TV shows and Music Competition shows
• QQ Music and Kugou are his top services but he also uses China Mobile and China Telecom
• And he is paying for a subscription to Kugou

HOW DOES HE FEEL ABOUT BRAND INTERACTIONS?
• He is most receptive to a brand offering free access to music (such as a free month’s subscription or CD giveaways) or sponsoring the tour of an artist / band that he likes
MEET OLIVIA ROBINSON FROM AUSTRALIA

WHO IS SHE?
• 34 years old
• ~77k Australian Dollars in HH Income

HOW DOES SHE INTERACT WITH MUSIC?
• She discovers music via online audio or video music websites/apps and via the playlists on music streaming services
• YouTube is her top service but also uses Spotify, Apple Music, and iHeartRadio.
• But she only pays for one subscription and that is for Spotify

HOW DOES SHE FEEL ABOUT BRAND INTERACTIONS?
• She likes when a brand offers free giveaways and free access to music.
• She also likes it if a brand organizes a music festival or sponsors a tour of a band that she likes.
Get access to the first ever

NIELSEN ASIA-PACIFIC DANCE MUSIC REPORT

commissioned by A2LiVE

Covering the hottest topics, music trends and target consumers in the dance music market

ON SALE WORLDWIDE NOVEMBER 1

Please contact llopez@a2live.cn for purchasing details
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