

MUSIC matters

PLUG INTO ASIA



THE ASIA PACIFIC MUSIC FORUM / 2-4 JUNE 2009 HONG KONG

Music Matters?



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How we did it*

15-24 years old internet users

Online survey

Quarter 4, 2008

N=8,841



*Source: Synovate Young Asians 2008



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Where we did it*

China

Hong Kong

India

Indonesia

Japan

Malaysia

Philippines

Singapore

South Korea

Taiwan

Thailand

Vietnam



*Source: Synovate Young Asians 2008



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What matters?




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Going online and listening to music



Going online	+39%
Listening to music	+25%



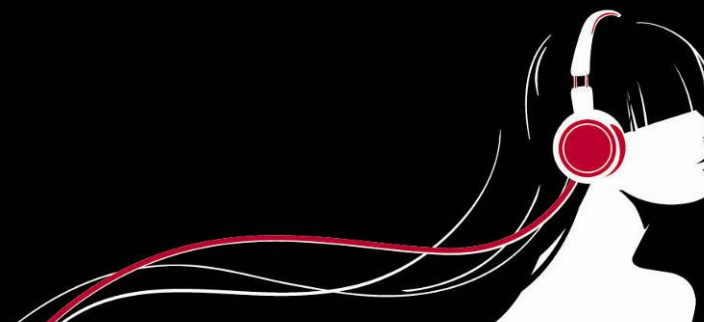
Listening to Radio	-23%
Reading Magazine	-23%
Watching TV	-18%
Reading Newspaper	-16%



Compared to 12 months ago, net change in proportion spending time on....
Base: Aged 15-24

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Spent more time listening to music

Compared to 12 months ago, net increase in proportion spending time listening to music

%



Base: Aged 15-24



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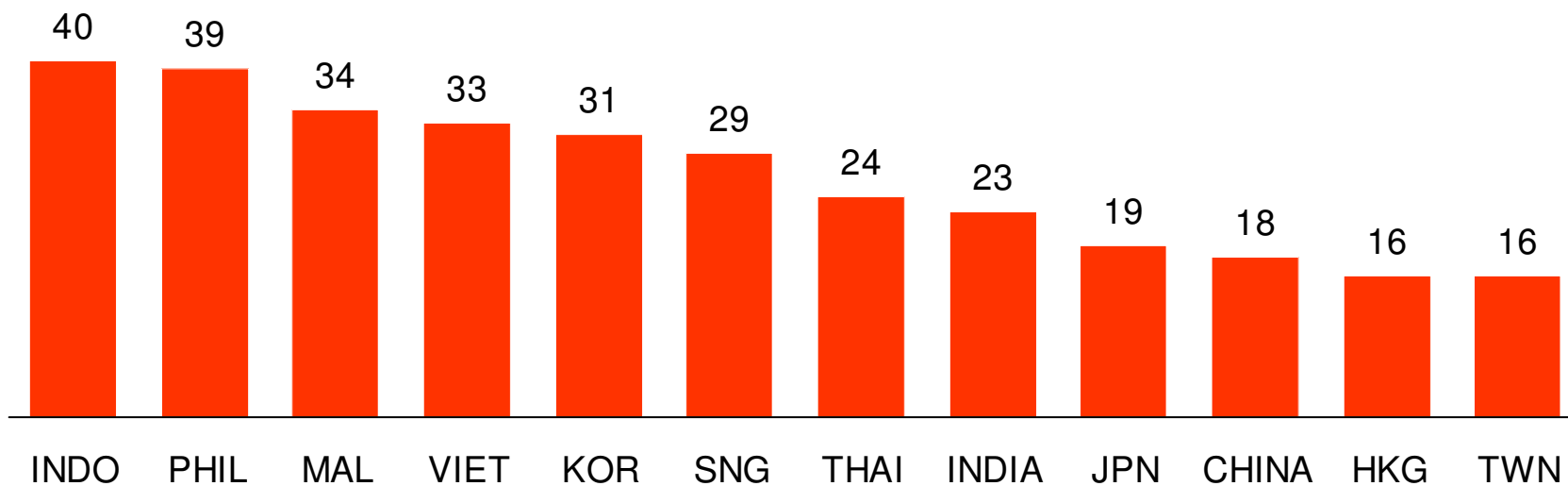


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Especially in Indonesia and the Philippines

Compared to 12 months ago, net increase in proportion spending time listening to music

%



Base: Aged 15-24



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Asian youth are passionate about music...



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68% of Asian youth say
music is a very important
part of their lives



Top 2/5 boxes
Base: Aged 15-24



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Only **10%** of Asian youth
don't agree music is a very
important part of their lives



Bottom 2/5 boxes
Base: Aged 15-24



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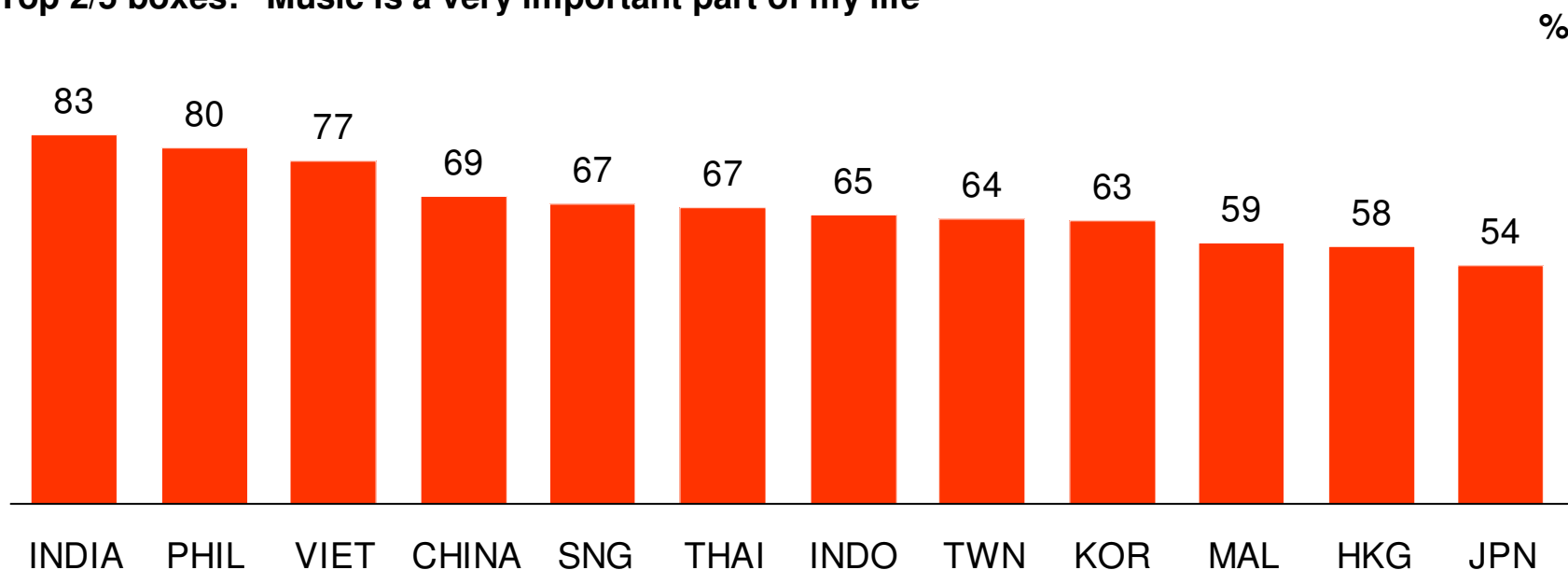
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Indians and Filipinos love music most

Top 2/5 boxes: "Music is a very important part of my life"



Base: Aged 15-24



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Who are their favourites?



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Asia's music talent rules!

Favourite singer

	FIRST	SECOND	THIRD
China	Jay Chou	Andy Lau	Jacky Cheung
Hong Kong	Eason Chan	Jay Chou	Joey Yung
India	A.R. Rahman	Sonu Nigam	Lata Mangeshkar
Indonesia	Agnes Monica	Ungu	Peter Pan
Japan	Arashi	Ayumi Hamasaki	Yui Aragaki
Korea	Big Bang	Rain	Wonder Girls
Malaysia	Jay Chou	Linkin Park	Wang Lee-Hom
Philippines	Sarah Geronimo	Avril Lavigne	Parokya ni Edgar
Singapore	Jay Chou	S.H.E.	Rihanna
Taiwan	May Day	Jay Chou	Wang Lee-Hom
Thailand	Body Slam	Da Endorphine	Potato
Vietnam	Dam Vinh Hung	Dan Truong	My Tam



Base: Aged 15-24

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How do they listen to music?



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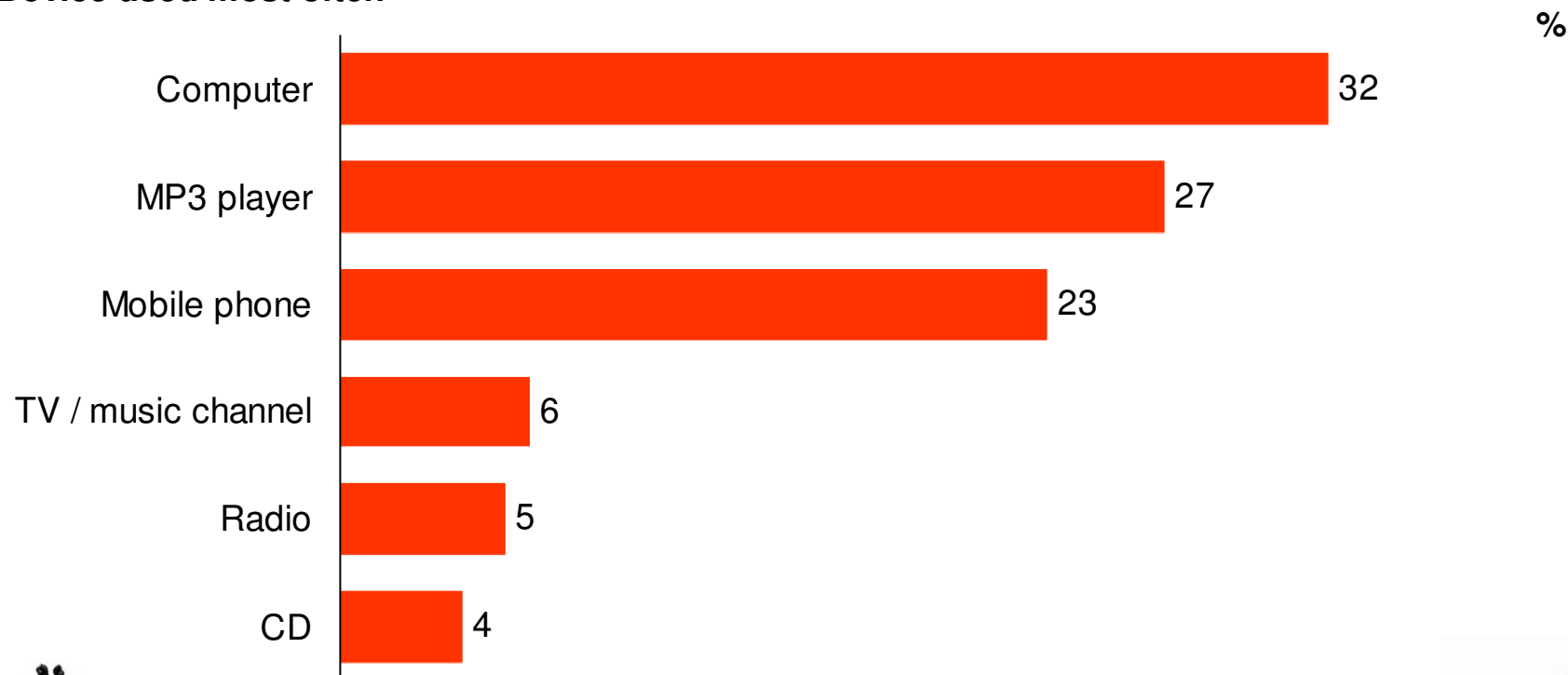
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Computer is the most popular device

Device used most often



Base: Aged 15-24

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Top choice in each market

Device used most often

Computer



VIET
52%



TWN
50%



MAL
47%



PHIL
34%



HKG
34%

MP3 Player



KOR
48%



JPN
44%



CHINA
36%

Mobile Phone



INDIA
41%



THAI
39%



SNG
33%



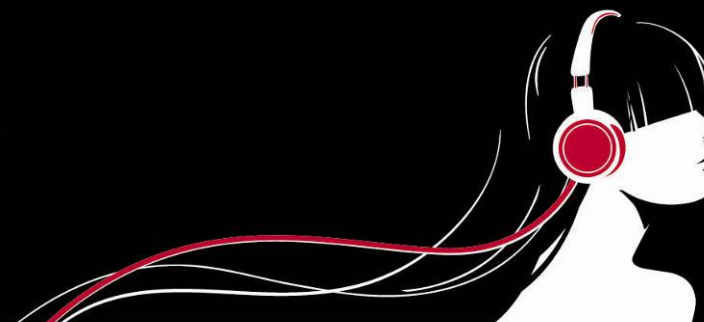
INDO
25%



Base: Aged 15-24

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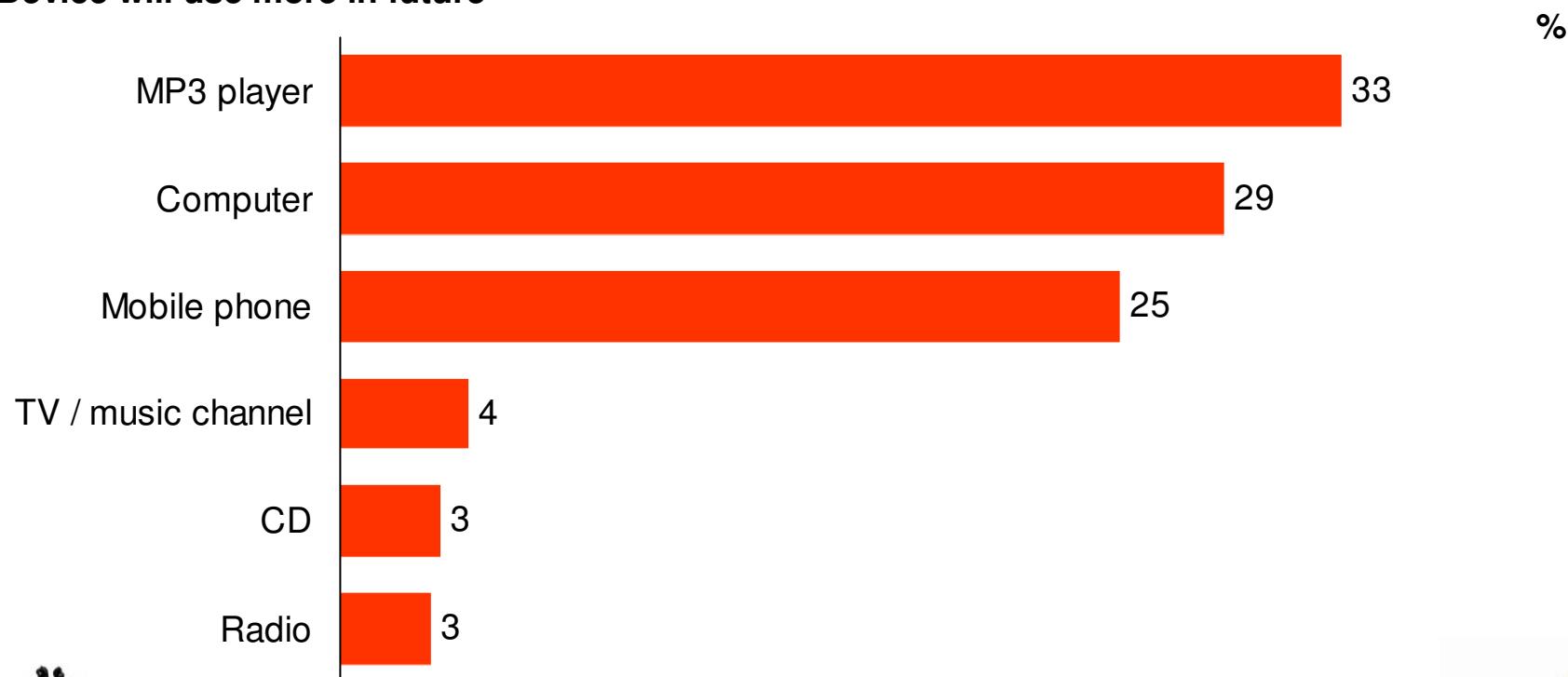
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Will use MP3 player more in future

Device will use more in future



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Top choice in each market

Device will use more in future

MP3 Player



KOR
57%



JPN
50%



SNG
43%



CHINA
35%



PHIL
34%

Computer



VIET
45%



TWN
40%



MAL
32%

Mobile Phone



INDIA
39%



THAI
34%



HKG
34%



INDO
34%



Base: Aged 15-24

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Music videos



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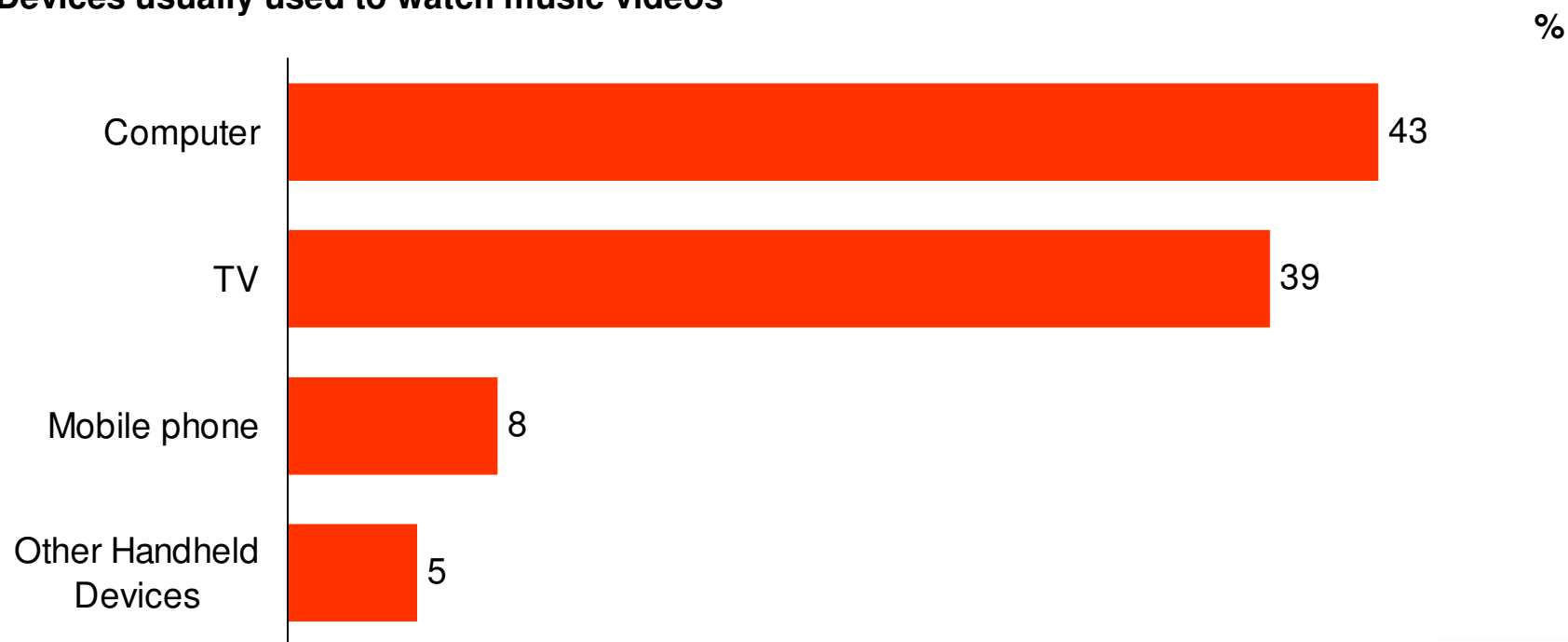
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Internet has changed video viewing

Devices usually used to watch music videos



Base: Aged 15-24



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The mobile is taking off...



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88% have their own
mobile phones



Base: Aged 15-24



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57% listened to music
via mobile phone



In past month
Base: Mobile phone owners aged 15-24



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Source of music on mobile phone

46%

Download online from computer and transfer files to phone

%

24%

Bluetooth / MMS from other mobile phones

21%

Download online to mobile phone directly

5%

Copy from CD/tape



Base: Aged 15-24 and used mobile phone to listen to music in past month



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Are they paying?



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11% paid to download
music online



In past month
Base: Aged 15-24



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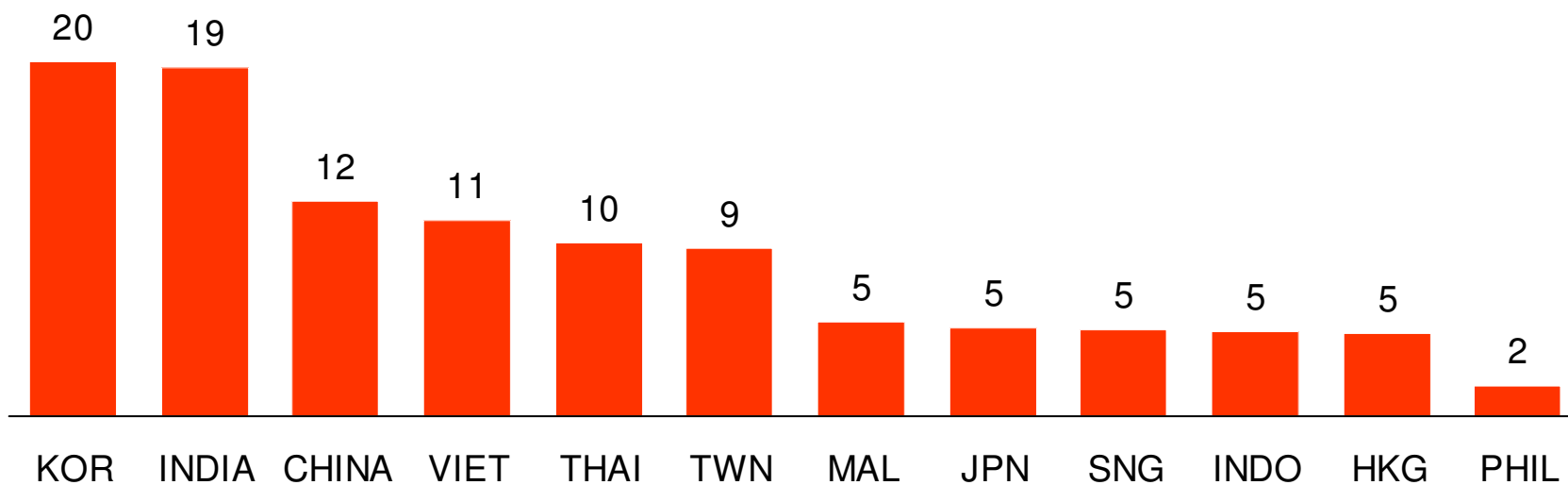


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Paid to download music

% past month

%



Base: Aged 15-24



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THE ASIA PACIFIC MUSIC FORUM / 2-4 JUNE 2009 HONG KONG

41% downloaded **free**
music online



In past month
Base: Aged 15-24



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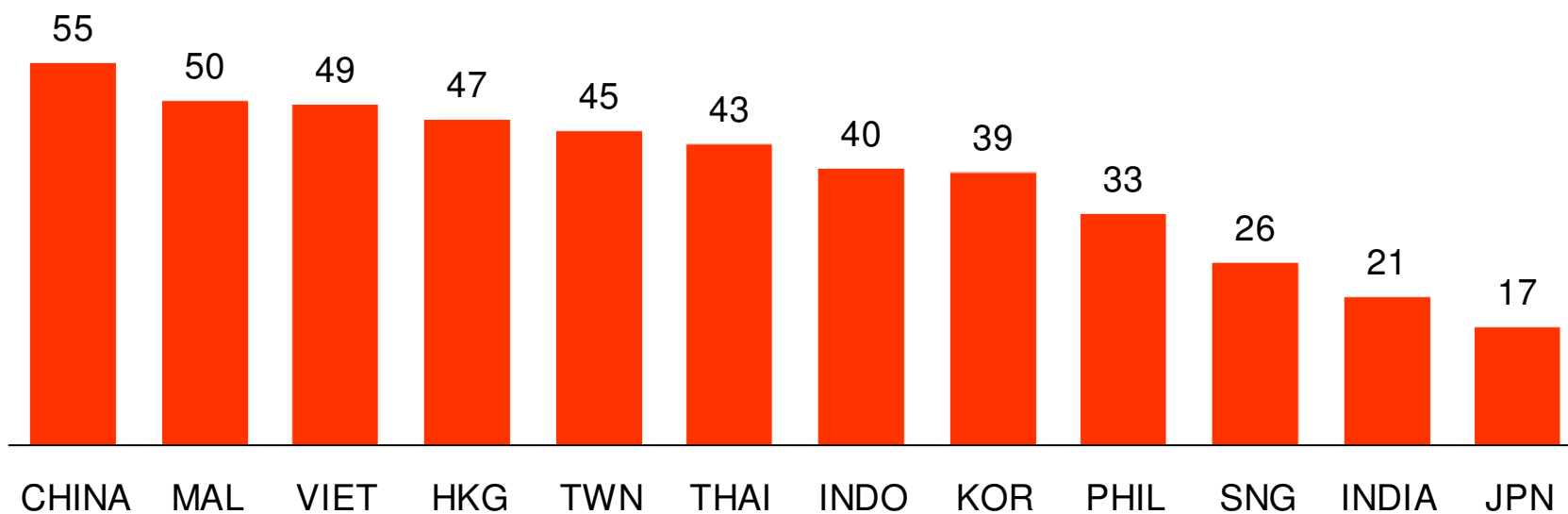


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Unpaid download

% past month

%



Base: Aged 15-24



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Music does matter!

Thank You!

