IMS Business Report 2017

An in-depth review of the industry today, and a look back over the past decade in Electronic Music

A. Music Sales & Genres

B. DJs & Live Acts

C. Clubs & Festivals

D. Companies & Brands

E. IMS Ibiza 10 – A Decade In The Industry

F. Industry Value
Streaming services and Latin American market continue to drive global music industry growth

**Paid Subscribers to Music Streaming Services (2012-2016)**

<table>
<thead>
<tr>
<th>Year</th>
<th>Subscribers (m)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>20m</td>
</tr>
<tr>
<td>2013</td>
<td>28m</td>
</tr>
<tr>
<td>2014</td>
<td>41m</td>
</tr>
<tr>
<td>2015</td>
<td>68m</td>
</tr>
<tr>
<td>2016</td>
<td>112m</td>
</tr>
</tbody>
</table>

+65% growth

**Recorded Music Industry Revenue YoY Growth by Region (2015-2016)**

- **Global**: 5.9%
- **Latin America**: 12%
- **North America**: 7.9%
- **Asia & Australasia**: 5.1%
- **Europe**: 4.0%

Source: IFPI
On Spotify Mexico & Brazil are in Top 10 for total electronic streams; Higher share in Europe & Asia

<table>
<thead>
<tr>
<th>country</th>
<th>Electro streams</th>
</tr>
</thead>
<tbody>
<tr>
<td>US</td>
<td></td>
</tr>
<tr>
<td>GB</td>
<td></td>
</tr>
<tr>
<td>DE</td>
<td></td>
</tr>
<tr>
<td>MX</td>
<td></td>
</tr>
<tr>
<td>SE</td>
<td></td>
</tr>
<tr>
<td>AU</td>
<td></td>
</tr>
<tr>
<td>BR</td>
<td></td>
</tr>
<tr>
<td>NL</td>
<td></td>
</tr>
<tr>
<td>CA</td>
<td></td>
</tr>
<tr>
<td>NO</td>
<td></td>
</tr>
</tbody>
</table>

Currently 12 billion Electronic music monthly streams on Spotify

Source: Spotify
Dance increased share of all formats in the USA in 2016, rising to be the 5th most popular genre.

- Dance share of total audio consumption increased to 4% in 2016 from 3.4% in 2015.
- Genre moved above Latin to become 5th most popular overall, behind only Rock, R&B/ Hip Hop, Pop and County.
- For on-demand audio streaming, Dance is joint 4th most popular genre with a 6% share.
- 57% of total Dance ‘sales’ are from streaming – the highest of any genre in the US.

**Dance / Electronic Genre Share of Total Consumption by Format**

(USA, 2015-2016)

<table>
<thead>
<tr>
<th>Format</th>
<th>2015</th>
<th>2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Albums*</td>
<td>1.8</td>
<td>3</td>
</tr>
<tr>
<td>Tracks*</td>
<td>4.2</td>
<td>5</td>
</tr>
<tr>
<td>On-Demand Audio</td>
<td>4.7</td>
<td>6</td>
</tr>
<tr>
<td>Total</td>
<td>3.4</td>
<td>4</td>
</tr>
</tbody>
</table>

Note: * Digital Albums & Digital Tracks used for 2016
In Germany, Dance share of sales reached an all-time high in 2016, double that of three years ago

Dance Music Share of Turnover (Germany)

- Dance music share climbed to 7% in 2016, making it the fifth best-selling genre
- Share has grown in each of last three years, reaching double the level of 2013
- 58% of Dance music buyers less than 40 years old – highest proportion of any genre – next highest is Rock at 34%

Source: Bundesverband Musikindustrie (BVMI)
Latest statistics from France show Dance was the most played genre on radio in 2015

### Music Genre Share by Medium (France, 2015)

<table>
<thead>
<tr>
<th>Medium</th>
<th>Dance</th>
<th>V. francophone</th>
<th>Pop Rock</th>
<th>Rap</th>
<th>Groove</th>
</tr>
</thead>
<tbody>
<tr>
<td>Radio</td>
<td>29%</td>
<td>19%</td>
<td>14%</td>
<td>11%</td>
<td>11%</td>
</tr>
<tr>
<td>Streaming Audio</td>
<td>22%</td>
<td>10%</td>
<td>14%</td>
<td>31%</td>
<td>12%</td>
</tr>
</tbody>
</table>

- On French radio in 2015, Dance was the most-played genre with a 29% share – 10% more than any other genre.
- For streaming audio, Dance had the second highest share with 22%, only behind Rap.
- Dance also secured a 13% share of streaming video, placing it third.

Beatport has continued strong growth in 2017 and returned to profit as part of LiveStyle Inc.

Beatport Year on Year Growth
(Q1 2016 - Q1 2017)

- Beatport has delivered renewed growth and returned to being profitable in the first quarter of 2017
- Visitors, registered users and track sales have all increased compared to the same period in 2016
- Streaming service has been discontinued following restructure of parent SFX – now LiveStyle

Note: * YoY growth is Q1 Jan 2016 compared to Q1 Jan 2017
Source: Beatport, industry press
Techno remains the best selling Beatport genre, with Trance and Drum & Bass highest climbers

**Best Selling Genres on Beatport**
(Q1 2015-Q2 2017)

1. Techno
2. Tech House
3. House
4. Deep House
5. Drum & Bass
6. Trance
7. Electronica
8. Prog. House
9. Future House
10. Indie Dance / Nu Disco
11. Electro House

Techno remains #1 genre on Beatport, slightly outselling Tech House

Trance resurgent in last 12 months – up four to #6

EDM genre Future House climbed to #9

Meanwhile, Electro House fell from #5 to #13 in just nine months

Source: Beatport; Note: Techno includes Minimal / Deep Tech
House is the most played genre on Pioneer DJ KUVO; Drum & Bass is highest climber in 2017

Most Played Dance Genres* on Pioneer DJ KUVO
(Global, April 2016 – March 2017)

1. House
2. Tech House
3. Deep House
4. Techno
5. Drum & Bass
6. Electro House
7. Progressive House
8. Electronica
9. Trap
10.

1. House
2. Tech House
3. Deep House
4. Techno
5. Drum & Bass
6. Electro House
7. Progressive House
8. Electronica
9. Trap
10.

Note: * Excludes genres such as Pop, Rock, Hip-Hop
Source: Pioneer DJ

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F. Industry Value
Forbes’ estimates earnings of Top 12 DJs fell 1% in 2016 to $300m – still 12% higher than 2013

Forbes Electronic Cash Kings (2013-16)

<table>
<thead>
<tr>
<th>Year</th>
<th>Artist</th>
<th>Earnings</th>
<th>YoY%</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>Calvin Harris</td>
<td>268</td>
<td>+9%</td>
</tr>
<tr>
<td>2014</td>
<td>Calvin Harris</td>
<td>293</td>
<td>+4%</td>
</tr>
<tr>
<td>2015</td>
<td>Calvin Harris</td>
<td>304</td>
<td>-1%</td>
</tr>
<tr>
<td>2016</td>
<td>Calvin Harris</td>
<td>300</td>
<td>-1%</td>
</tr>
</tbody>
</table>

#1 Calvin Harris - $63m (YoY -5%)
#2 Calvin Harris - $38m (YoY 3%)
#3 Calvin Harris - $28m (YoY -22%)
#4-12 Artists - 4%

• Forbes estimate Calvin Harris’ earnings fell 5% YoY in 2016 to $63m
• Places him #9 on overall highest-paid musicians list
• Tiesto up to #2 (earnings +6% YoY), David Guetta down to #3 (-24% YoY)
• DJs / Artists placed #4-12 in list earned 4% more than 2015

Source: Forbes

IMS Business Report 2017 by Kevin Watson, Danceonomics.com
The most popular DJs are growing their followers 11x faster on Instagram than on Facebook

Growth in Online Fanbases of Viberate Ranked DJs
(Past 3 months, May 2017)

<table>
<thead>
<tr>
<th>Top 10</th>
<th>Facebook</th>
<th>Twitter</th>
<th>Instagram</th>
<th>YouTube</th>
<th>Soundcloud</th>
</tr>
</thead>
<tbody>
<tr>
<td>Martin Garrix</td>
<td>3%</td>
<td>14%</td>
<td>17%</td>
<td>18%</td>
<td>5%</td>
</tr>
<tr>
<td>Skrillex</td>
<td>0%</td>
<td>5%</td>
<td>8%</td>
<td>3%</td>
<td>1%</td>
</tr>
<tr>
<td>Hardwell</td>
<td>1%</td>
<td>12%</td>
<td>5%</td>
<td>3%</td>
<td>1%</td>
</tr>
<tr>
<td>David Guetta</td>
<td>0%</td>
<td>1%</td>
<td>9%</td>
<td>4%</td>
<td>1%</td>
</tr>
<tr>
<td>Steve Aoki</td>
<td>2%</td>
<td>12%</td>
<td>10%</td>
<td>3%</td>
<td>0%</td>
</tr>
<tr>
<td>Calvin Harris</td>
<td>0%</td>
<td>9%</td>
<td>9%</td>
<td>6%</td>
<td>0%</td>
</tr>
<tr>
<td>The Chainsmokers</td>
<td>15%</td>
<td>40%</td>
<td>45%</td>
<td>8%</td>
<td>8%</td>
</tr>
<tr>
<td>Diplo</td>
<td>2%</td>
<td>8%</td>
<td>9%</td>
<td>7%</td>
<td>0%</td>
</tr>
<tr>
<td>Tiësto</td>
<td>0%</td>
<td>5%</td>
<td>6%</td>
<td>2%</td>
<td>1%</td>
</tr>
<tr>
<td>Flume</td>
<td>2%</td>
<td>8%</td>
<td>11%</td>
<td>8%</td>
<td>2%</td>
</tr>
<tr>
<td><strong>Average</strong></td>
<td>1%</td>
<td>7%</td>
<td>12%</td>
<td>5%</td>
<td>1%</td>
</tr>
</tbody>
</table>

**Selected Others**

<table>
<thead>
<tr>
<th></th>
<th>Facebook</th>
<th>Twitter</th>
<th>Instagram</th>
<th>YouTube</th>
<th>Soundcloud</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marshmello</td>
<td>39%</td>
<td>28%</td>
<td>44%</td>
<td>16%</td>
<td>18%</td>
</tr>
<tr>
<td>DJ Snake</td>
<td>7%</td>
<td>27%</td>
<td>20%</td>
<td>15%</td>
<td>5%</td>
</tr>
<tr>
<td>Nina Kraviz</td>
<td>5%</td>
<td>2%</td>
<td>12%</td>
<td>n/a</td>
<td>8%</td>
</tr>
</tbody>
</table>

Source: Viberate, Facebook, Twitter, Instagram, Soundcloud, YouTube, IMS Analysis
The Chainsmokers are adding 28k social media followers a day, well below David Guetta’s peak

Daily Social Media Follower Growth*

- David Guetta was adding 47k fans a day on Facebook and Twitter in 2011/12
- The Chainsmokers are currently gaining 28k per day, including Instagram
- Most viewed YouTube video for Chainsmokers (‘Closer’) has 1.5bn views, 44% more than Guetta’s most-viewed video ‘Hey Mama’ (1.1bn)
- Debut album from The Chainsmokers sold 166k copies in US in first week

Source: Facebook, Twitter, Instagram, Viberate, YouTube, Billboard, industry press, IMS Analysis
Gender diversity remains a key issue – study of 24 festivals found only 17% of artists were female

- Thump study of 24 festivals in 2016 found on average only 17% of artists were women
- Some Dance festivals had a much lower % - Beyond Wonderland had only 2 female artists out of 61 (3.2%)
- Smirnoff campaign aimed at doubling number of female headliners at major music festivals in the next three years

Source: Thump, Vice, Broadly, Smirnoff

INDICATIVE
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Millennials are 40% more likely to attend a club event in the USA, and total 2 billion globally

**US Live Music Attendance by Type in 2016***

<table>
<thead>
<tr>
<th>Event Type</th>
<th>Index: % Millennials to % General Population</th>
<th>% General Population</th>
</tr>
</thead>
<tbody>
<tr>
<td>Club events (with DJs)</td>
<td>139</td>
<td>16%</td>
</tr>
<tr>
<td>Club events (to see specific DJ)</td>
<td>136</td>
<td>14%</td>
</tr>
<tr>
<td>Music festivals</td>
<td>102</td>
<td>33%</td>
</tr>
<tr>
<td>Live concerts with multiple headliners</td>
<td>100</td>
<td>40%</td>
</tr>
<tr>
<td>Live concerts with one main headliner</td>
<td>107</td>
<td>59%</td>
</tr>
<tr>
<td>Small live music sessions</td>
<td>112</td>
<td>41%</td>
</tr>
</tbody>
</table>

- Overall 16% of people in the USA attended a club event with DJs in 2016, 14% for a specific DJ
- Millennials attendance at these events was 39% higher than average
- Estimated 75m Millennials in the USA, 2 billion globally = 27% of population
- Hispanics also over-index on club events, spending 17% of their music wallet on them

Note: *Question: Which of the following have you attended in the last 12 months? Source: Nielsen Music 360 – 2016 Highlights, Pew Research Center*
Tomorrowland and Ultra have both used partner events to expand their festival brands worldwide.

**Tomorrowland Festivals & Events (2012-2017)**

- **2012**: 1 festival, 2 ‘Unite’ events
- **2017**: x10 festivals, 8 ‘Unite’ events

Locations include:
- Belgium
- Lebanon
- Dubai
- South Korea
- Germany
- Taiwan
- Israel
- Malta

**Ultra Music Festivals & Events (2012-2017)**

- **2012**: 3 festivals, 10 ‘Road to Ultra’ events
- **2017**: x7 festivals, 21 ‘Road to Ultra’ events

Locations include:
- Miami
- India
- Japan
- Taiwan
- S. Arica
- Philippines
- China
- Chile

Source: Tomorrowland, Ultra, industry press, IMS Analysis
Latin America has many high-profile Dance clubs & festivals, and huge growth in total music sales

- 2nd highest Spotify penetration in the world at 25%*
- Music revenue up 24% YoY in 2016
- Four of largest LATAM festivals in 2017: EDC Mexico (110k), BPM (70k+), Beyond Wonderland (50k), WiSH Outdoor (35k)
- La Huaka was #74 in DJ Mag Top 100 2017
- Storyland festival (2 days, 35k capacity)
- BAUM club & festivals in Bogota
- 7 Clubs in DJ Mag Top 100: Green Valley (8k), Sirena (5k), Matahari (5k), Anzu (3k), Warung (2.5k)
- Also Ultra Brasil festival (60k) in October 2017

Latin America region statistics
- Streaming revenue +57% in 2016
- Highest regional music sales growth
- 30% of population are Millennials

Note: * As estimated by GlobalWebIndex in 2015
Source: IFPI, GlobalWebIndex, DJ Mag, Datanalisis ‘Conecta tu marca con los millennials’, industry press
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Two major industry players have been acquired since August 2016, and more deals could follow

Ministry of Sound Recordings

- Acquired by Sony Music UK in August 2016 for estimated £67m
- Deal includes artists, back catalogue and compilations business
- Label was launched in 1993 and has cumulative album sales of 70m+, including 40 UK #1s


Pacha Group

- Sold to Trilantic Capital Partners for €350m in February 2017
- Group operates ten nightclubs around the world, including Ibiza venues Pacha, Destino and Lio
- First venue was opened by founder Ricardo Urgell in Sitges, Spain in 1967
Global Entertainment are expanding into festivals, including investments in three Dance events

<table>
<thead>
<tr>
<th>Event</th>
<th>Location</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>South West Four</td>
<td>London, UK</td>
<td>• Acquired from Impresario alongside other events including Field Day</td>
</tr>
<tr>
<td></td>
<td>October 2016</td>
<td>• Leading London-based electronic music festival established in 2001</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Held in August with two day capacity of 40k</td>
</tr>
<tr>
<td>Hideout</td>
<td>Croatia</td>
<td>• Acquired majority stake in March</td>
</tr>
<tr>
<td></td>
<td>March 2017</td>
<td>• Festival now in seventh year of being held at Zrce beach in Croatia</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Global is also linked to promotion of Electric Elephant festival in Croatia</td>
</tr>
<tr>
<td>Snowbombing</td>
<td>Austria &amp; Canada</td>
<td>• Global increased investment in Broadwick Live which promotes Snowbombing</td>
</tr>
<tr>
<td></td>
<td>October 2016</td>
<td>• In 2017 the first edition will be held in Canada, alongside event in Austria</td>
</tr>
</tbody>
</table>

Source: Global, Industry Press
Elrow received investment in February 2017 and is now set for it’s biggest Summer of events ever

Elrow Ibiza  
Residency at Amnesia,  
June-September 2017

Elrow Friends & Family  
New one-day festival in  
Barcelona, July 2017

Elrow Town London  
Biggest ever UK event,  
August 2017

Elrow Barcelona  
Regular events continue,  
May & June 2017

Source: Elrow, Industry Press
Dance is at the forefront of global technology trends, including VR, AI and live streaming

Virtual Reality
- Boiler Room & Google created first ever VR dancefloor experience ‘Techno in Berlin’
- The Chainsmokers & Sony created a VR music festival ‘Lost In Music’

Live Streaming
- Facebook Live recently used by Avicii (studio) and EDC (line-up announcement)
- Hardwell’s 2017 Ultra Music Festival set was live-streamed in 360 degrees on YouTube

OTT Video
- Two DJ-themed Netflix originals launched in August 2016 – Steve Aoki documentary ‘I’ll Sleep When I’m Dead’, and film ‘XOXO’
- Now over 100m Netflix members worldwide

Chat-bots & AI
- Hardwell launched a fan-focused Facebook Messenger bot in 2016 – has had 500k users
- Pacemaker DJ app uses AI to turn a Spotify or Apple Music playlist into a mix

Source: Industry Press
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Record sales: USA Dance share now reported, Germany share 3x higher than 2007, UK +1.5%

<table>
<thead>
<tr>
<th></th>
<th>2007</th>
<th>2016</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>USA</strong></td>
<td>?</td>
<td>5%</td>
</tr>
<tr>
<td><strong>Dance share</strong>&lt;br&gt;of track sales</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Germany</strong></td>
<td>2.2%</td>
<td>7.0%</td>
</tr>
<tr>
<td><strong>Dance share</strong>&lt;br&gt;of revenue</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>UK</strong></td>
<td>15.5%</td>
<td>17.0%</td>
</tr>
<tr>
<td><strong>Dance share</strong>&lt;br&gt;of single sales</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Beatport</strong></td>
<td></td>
<td>25x</td>
</tr>
<tr>
<td><strong>Tracks for sale</strong></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Nielsen US music report in 2007 did not report on Dance as a specific genre
- Dance share reached an all-time high in 2016, over 3x share achieved in 2007
- UK Dance share is now back above 2007 level after a dip in the late 2000s
- There are now 25x more tracks available on Beatport than 10 years ago

**Note:** * increase in Beatport tracks shown as Jan 2017 compared to Jan 2008

**Source:** Nielsen / RIAA, BVMI, Official Charts Company / BPI, Beatport
**DJs: average age of DJ Mag Top 10 is lower by 3 years than in 2007 with half now younger than 30**

<table>
<thead>
<tr>
<th></th>
<th>2007</th>
<th></th>
<th>2016</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>Most popular genre</strong></td>
<td><strong>Average Age</strong></td>
<td><strong>Leading country</strong></td>
<td><strong># &lt; 30 years old</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Trance</strong></td>
<td><strong>EDM</strong></td>
<td><strong>UK</strong></td>
<td><strong>NL</strong></td>
</tr>
<tr>
<td>1.</td>
<td>Armin van Buuren</td>
<td>36</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>2.</td>
<td>Tiesto</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.</td>
<td>John Digweed</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4.</td>
<td>Paul van Dyk</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5.</td>
<td>Sasha</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6.</td>
<td>Above &amp; Beyond</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7.</td>
<td>Carl Cox</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8.</td>
<td>Ferry Corsten</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9.</td>
<td>Infected Mushroom</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10.</td>
<td>David Guetta</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Source:** DJ Mag Top 100 DJs
Clubs: three venues are still in DJ Mag Top 10, but all have undergone significant change in 2017

<table>
<thead>
<tr>
<th>2008</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Fabric</td>
<td>1. Space Ibiza</td>
</tr>
<tr>
<td>2. Space Ibiza</td>
<td>2. Fabric</td>
</tr>
<tr>
<td>3. Amnesia</td>
<td>3. Green Valley</td>
</tr>
<tr>
<td>4. The End</td>
<td>4. Zouk</td>
</tr>
<tr>
<td>5. Womb</td>
<td>5. Octagon</td>
</tr>
<tr>
<td>6. Panorama Bar</td>
<td>6. Ushuaia</td>
</tr>
<tr>
<td>7. Pacha Ibiza</td>
<td>7. Pacha Ibiza</td>
</tr>
<tr>
<td>8. Guvernment</td>
<td>8. Echostage</td>
</tr>
<tr>
<td>10. Watergate</td>
<td>10. BCM</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Geography</th>
<th>2008</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spain</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>UK</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>Brazil</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>North America</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Asia</td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>Europe</td>
<td></td>
<td>2</td>
</tr>
</tbody>
</table>

Geographic make-up of Top 10 has remained largely unchanged: **Spain** leads the way (3 in 2008, 4 in 2017), followed by **UK** (2, now 1), 1 in **Brazil**, 1 in **North America**, remainder in **Asia** and **Europe**

Source: DJ Mag Top 100 Clubs
### Festivals: three largest Dance Music events have quintupled their capacity since 2008

<table>
<thead>
<tr>
<th>Event</th>
<th>Main Event Capacity (k)</th>
<th>2008</th>
<th>2017</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tomorrowland, Boom, Belgium</td>
<td>50</td>
<td>360</td>
<td></td>
<td>5.2</td>
</tr>
<tr>
<td>Electric Daisy Carnival, LA / Las Vegas, USA</td>
<td>65</td>
<td>400</td>
<td></td>
<td>5.77</td>
</tr>
<tr>
<td>Ultra Music Festival, Miami, USA</td>
<td>70</td>
<td>165</td>
<td></td>
<td>2.36</td>
</tr>
<tr>
<td><strong>Total of ‘Big 3’ Events</strong></td>
<td>185</td>
<td>925</td>
<td></td>
<td>4.96</td>
</tr>
</tbody>
</table>

- **Tomorrowland**: 4th edition in 2008 attracted 50k, 360k capacity over 2 weekends in 2017, plus 8 ‘Unite’ events.
- **Electric Daisy Carnival**: Vegas event now attracts 6x more people than in 2008 in LA, EDC events now worldwide.
- **Ultra Music Festival**: 70k at 10th anniversary in 2008, now 165k in Miami and 1m Ultra event attendees globally.
- **Total of ‘Big 3’ Events**: Capacity of 3 largest festivals increased by 5x since 2008, main events now attract 925k.

**Source:** Tomorrowland, EDC, Ultra Music Festival, industry press, IMS Analysis

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**INDICATIVE**
Equipment: since 2007 DJ Gear sales have grown at twice the rate of guitar sales in the USA


- DJ Gear sales increased by 25% from 2007 to 2014 (latest available data)
- During this time, sales of ‘fretted products’ (electric & acoustic guitars and accessories) grew by 12%
- Within DJ Gear, Digital DJ controllers account for a third of sales, followed by DJ Mixers and CD Players

Source: NAMM Global Report
IMS Business Report 2017

A. Music Sales & Genres
B. DJs & Live Acts
C. Clubs & Festivals
D. Companies & Brands
E. IMS Ibiza 10 – A Decade In The Industry
F. Industry Value
Global Electronic Music industry value up 3% YoY to $7.4 billion as positive trends continue

- Tracking industry growth over past year, driven by positive trends in all key segments

- **Music** revenue and Dance share growing
  - Streaming subs +60%; Dance over-indexes
  - Mexico & Brazil in Spotify Electronic Top 10
  - Dance share increasing in USA & Germany

- **Festival & Clubs** expanding internationally
  - Ultra & Tomorrowland partner events
  - Millennials 40% more likely to attend clubs

- **DJ & Artists** growing earnings and fanbases
  - Forbes #4 to #12 earned 4% more YoY
  - Double-digit Instagram growth for Top 10


IMS Business Report 2017 by Kevin Watson, Danceconomics.com
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