*State of Play:*

# DANCE MUSIC

## UK AND SPAIN 2015

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## UK AND SPAIN 2015


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# FOREWORD

# *FOREWORD:*
# MARK LAWRENCE

THE CEO OF THE ASSOCIATION FOR ELECTRONIC MUSIC INTRODUCES THE **'STATE OF PLAY: DANCE MUSIC'** REPORT

*Mark Lawrence is Chief Executive at AFEM, a not-for-profit trade association created to represent the common interests of those companies and individuals whose business is Electronic Dance Music*

**MARK LAWRENCE**
CEO, AFEM (ASSOCIATION FOR ELECTRONIC MUSIC)

Dance music has come a long way.

Our beloved genre is now at the forefront of the music industry. It has cemented its presence at the top of the charts, kicked open the doors of America, India and Asia and placed itself firmly on the global stage.

With over 10 million people in the UK and upwards of 15 million in Spain having attended at least one dance music event in the last three years, this State of Play report brings into sharp focus the vast audiences that dance music is capable of commanding. A 29% rise in interest in electronic music events amongst those who frequent UK mainstream festivals highlights the continuing draw of new converts to a scene that puts 'the experience' on a par with the music. With a heightened desire among fans for the togetherness, the atmosphere and the sense of escapism that makes a dance event so unique, it is no wonder dance music festivals have grown by some 500%* over the last 15 years.

There are those that cite the EDM boom as the dot.com era of dance music, an unsustainable bubble that may burst at any given moment. Dance music is bigger, broader and bolder than a single acronym. Founded on the tireless work and creativity of hardened club DJs, promoters, managers and producers the world over, dance music continues to go from strength to strength. This is actively reinforced in this report, with fan attendance set to rise again next year and with 80% planning to visit a dance gig in the UK and 70% set to flock to sun kissed beach venues in Spain.

Dance music is no longer simply the underground sound of the few; it is a global movement, one that has levelled the musical playing field, enabling the humble bedroom DJ to find an avid audience, thanks to the rise of advanced music technology and social marketing.

Dance music is a genre that is constantly pushing back the boundaries that define it, and it is this perpetual sense of momentum, a sense of never standing still, of always striving to find the next big sound, that will continue to draw audiences to the clubs, fields and beaches for years to come.

Yes, dance music has come a long way and I have a feeling that the best is still to come.

*"Thanks to Ticketmaster, the world's leading ticketing agent, we finally have a powerful study of dance music culture in the UK and Ibiza. The release of this report is a pivotal moment; providing an insight into our community and educating the wider media and music industry on the value of, and the values within, dance music culture"*

* Dr Geoff Ellis, independent researcher

# EVOLUTION OF SOUND

# *ARTICLE:* EVOLUTION OF SOUND

## FRUKT'S TRENDS & INSIGHTS EDITOR UNPACKS THE INHERENT VALUE AT THE HEART OF THE RECENT DANCE MUSIC BOOM

*Giles Fitzgerald has spent the last decade writing extensively about the evolving role of brands in music, delivering insight for some of the world's most successful companies (including Coca-Cola, MasterCard, McDonald's & Nike)*

**GILES FITZGERALD**
TRENDS & INSIGHTS EDITOR, FRUKT

Unless you've been living under a particularly heavy rock since the turn of the decade, you couldn't help but notice that dance music culture is undergoing something of a renaissance. Legions of frenzied fans are clambering over each other in a bid to acquire tickets to sought after live events and multi-day festivals. DJs dominate the airwaves and, once again, command a godlike presence at the helm of clubs, venues and festivals the world over. With EDM's estimated global value in the region of $6.9B*, to say dance music is 'booming' is something of an understatement.

But it wasn't always this way.

America, that somewhat forgotten bastion of dance music – despite giving birth to both Techno and House from the impassioned Detroit and Chicago inner city club scene – kept dance music firmly underground and out of the hearts and minds of the American music consuming masses for decades. It dabbled, certainly, but never truly committed to the evolving genres it nurtured. A side-lining effect that was directly at odds with dance music's widespread appeal, revered status and progressive traction across the UK and Europe, serving to effectively stunt its global crossover potential well into the new Millennium. While the European creative melting pot pioneered scene after scene, from Rave to Trance, in the US it simply simmered, encroaching on the charts only fleetingly.

It wasn't until the, somewhat unintentional, re-branding of multiple dance music genres as EDM – a more radio friendly, accessible, lifestyle option for a generation of experience hungry Millennials – that dance finally broke America. Subsequently, in just half a decade, this simplified re-categorisation – led by a clutch of big name DJs – took the world by storm. Love it or loathe it, dance music culture would be forever changed.

Naturally, the EDM phenomenon has both its fans and detractors, with many hardened dance fanatics eager to differentiate between the rich subcultural heritage of dance and its openly commercial counterpart. There is no doubt that EDM's success is the result of standing on the pioneering, historical shoulders of giants of the genre. However, EDM's ability to catapult dance music onto the global stage similarly cannot be denied. Nor can its ability to bolster the demographic appeal of dance internationally, subsequently leveraging interest from a steady influx of corporate sponsors (MasterCard, Smirnoff, Bud Light, T-Mobile, etc) all eager to embrace – and help finance – a scene that encapsulates the very essence of creative expression, freedom and escapism.

All of which puts dance music firmly back on the agenda.


* IMS Business Report

EDM, of course, only scratches the commercial surface of dance music, a culture that has its roots firmly in the basements, bedrooms, warehouses and underground club scene. Cut open dance music and you will find (like age-defining tree rings) the raw cultural expression of numerous preceding generations compressed into its form. It is, and always will be, the sum of its many historical parts. Attempting to hold back its evolution is somewhat futile.

Dance music has a rich and varied heritage that spans the full gamut of the early days of Disco to sell out mega festivals like Electric Daisy Carnival, and everything in between. From Techno, House and Trance, to Dubstep, Hardstyle and Trap, dance music is constantly, organically, reinventing and redefining itself as each new generation – spurred on by the proliferation of easily accessible music creation technology – stamps its unique personality on the music. The one constant that binds it all together is the passion that the scene evokes. That passion is in no clearer evidence than when at the epicentre of a live event. Whether it's the hedonism of Ibiza club culture, a Kandi coloured multi-day festival, or a one-night-only Boiler Room event, dance music at its beating heart is crafted with a shared, euphoric and deeply resonant experience in mind. This is not a genre for the sedentary, casual or solitary listener. If there is one defining value, one integral element, that unites the underground scene and the more commercialised over ground, it's that dance music has to be experienced live.

So, while some quibble over the merits of dance music's evolution and commercialisation, fans, well, they simply don't care. Whether its alternative underground clubs or loud, brash festival culture, the fans all find their niche – just as long as the beat keeps dropping and they can be immersed in the vibrant community that sits at the very core of the scene.

Dance music is inherently social and deeply passionate, and it's this focus on the raw emotion of a live moment shared that powers the engine of a scene that will – no matter how the genre evolves and reinvents itself – always be guaranteed an audience of fiercely committed fans.

*'The one constant that binds dance music genres together is the passion that the scene evokes. That passion is in no clearer evidence than when at the epicentre of a live event'*

# *INTERVIEW:* JAMES BARTON

## LIVE NATION'S PRESIDENT OF ELECTRONIC MUSIC CHARTS THE EVOLUTION OF AN UNSTOPPABLE GENRE

*Consistently name-checked as the most influential man in dance music, James Barton has been a catalyst at the epicentre of dance culture, from the founding days of Cream to the forefront of Live Nation's EDM powerhouse*

**JAMES BARTON**
PRESIDENT OF ELECTRONIC MUSIC
LIVE NATION

**Q: How do you feel the live audience has evolved since the early days of Cream?**

**JB:** I've been involved in electronic music for over 25 years now, so I've seen not just the audiences changing, I've also seen the business change. In many ways the audience has driven the business. If you take a snapshot of where we are today, the average ticket buyer for our events is a young person roughly between 18-22 years old. The scary thing is that when we started out on this adventure of electronic music a lot of those kids weren't even born. There's a huge difference between the history and the roots of electronic music to where we are today. I think that the core values in electronic music are still pretty much the same, but the experience and consumption habits have changed dramatically.

If I take you back to 1996, at the height of Cream and club culture, kids were going out every Saturday night (maybe even every Friday/Saturday night) – that's not the norm any more, that's the exception. The norm is that kids now want to invest in big experiences, big moments in their year. This generation wants to be impressed. They want big productions, they want the biggest line-ups, they want fabulous weather, they want amazing services. In that respect they are so much better served today. If I think back to when I used to go to parties, I would climb fences, cross fields and wade through rivers to hear the music because it was so underground. Now I just need to turn the radio on





and I can hear the music. A lot of people say 'oh, it's not as good as it used to be,' but it actually is! If you're 20 years of age today and you've got access to Creamfields, Electric Daisy Carnival, Hard Fest, these incredible shows – which in some cases are costing tens of millions to produce – compared to what they would have had to do 20 years ago to get access to these DJs and the music, it's on a completely different level.

Maybe the spirit is different, the underground revolution vibe of 1988 doesn't exist as much in 2015, but the actual product is so much better.

**Q: The EDM festival market has grown exponentially over the last few years. What is it that has driven such a passionate groundswell of interest over the more traditional festival route?**

**JB:** First and foremost these festivals are just much more exciting. As a young person there is just so much more on offer at a major electronic show. People talk about DJs being the new rock stars, but they've gone past that. I've seen some of these guys produce shows at a level way beyond even successful rock stars. We are living in the 'age of experience', simply serving something up isn't enough, the kids want more.

Standing in front of a stage, in the rain, listening to a rock or pop band is not enough. There has got to be more going on around that, there's got to be much more on offer to get kids excited and get them to come back to your show year-on-year. The festivals that are actually doing this are the ones that are growing.

Not every dance festival works. When something's popular you get a lot of new entrants, you get an over saturation of the market, and then you get a correction. The guys that survive are the ones who know their business inside out. They know who their consumers are,

they know how to market to them, and they know what their product should look like. The guys who are winning, who are selling the tickets, are the guys who've had their roots in the culture for many, many years. The new guys who see it as 'an opportunity' are all going to the wall very quickly. If you don't understand the culture, and you don't understand the values in the culture, or the consumer, forget it.

**Q: How crucial is it that the dance music business supports underground culture and emerging talent?**

**JB:** We're never going to convince the superstar DJs to ever go back and play in clubs for £10,000 when they are getting hundreds of thousands to play festivals. So the underground guys have to fill that void. The great thing about electronic music is that for every great super club, for every great superstar DJ, there is a kid in his bedroom today trying to knock us all off our perch. And that's what keeps it fresh.

Dance music is just so much closer to this demographic than ever before. The kids raised on pop, as they grow and leave pop behind, they're not gravitating towards Rock 'n' Roll, they're focusing on electronic music – it just fits their lifestyle more. This generation is a generation of technology – they spend their whole day on devices – and dance music is created with technology, so there is a lot of compatibility. If a great dance record can now be made on an Apple device, well every kid in the world is probably sitting on an Apple device. The cost for some young new kid to sit in his bedroom and create a new sound is now tiny compared to paying thousands per day for access to a studio. Also, access to an audience and the channels of distribution are so different to what they were all those years ago. God bless those kids who are sitting there thinking 'I hate dance music today I'm going to come out with my own version and I'm posting it onto SoundCloud, Facebook, YouTube, whatever, and I'm going to build an audience.' It's these young producers who can hopefully push the genre on to the next level.

The good news is the genre is always reinventing itself, and as long as there are kids still passionate enough to go into their home studios and come up with something new and interesting, electronic dance music will continue to grow and evolve.

*'The great thing about electronic music is that for every great super club, for every great superstar DJ, there is a kid in his bedroom today trying to knock us all off our perch'*

# EXECUTIVE SUMMARY

# EXECUTIVE SUMMARY

## 1. THE CONTEXT

For the purpose of this research we have defined a 'dance event attendee' as someone who has been to any of the below types of live events featuring dance music in the last three years:

- **A dance music festival**
- **A dance music event in a club, warehouse or similar venue**
- **A beach clubbing destination** (such as Ibiza, Mykonos, Ayia Napa or any similar destinations known for their party/ clubbing scene) – however the majority of our analysis in this report will focus on Ibiza clubbing

Our research focuses on behaviours and attitudes of dance event attendees in the UK and Spain, so where possible we have called out the differences, as well as what 'brings together' these audiences in the two markets. Beyond a deeper understanding of this audience, we also looked at individual aspects that define the three types of live dance experiences ie. festivals, club/ venue events and Ibiza clubbing.

**DEFINITION USED IN THE SURVEY**

** By DANCE EVENTS, we mean a live event featuring dance/ Electronic music, for example a festival, a gig/ party taking place in a venue (such as a club or warehouse) or a 'getaway' where you travelled specifically for clubbing (Ibiza or similar)*



EXECUTIVE SUMMARY

## 2. THE INSIGHTS

**16% of the UK population and twice as many of the Spanish population (33%) have been to at least one dance event in the past three years**

- Likelihood to attend peaks among the 16-29 year olds in the UK, who are about four times more likely to have attended a dance event, compared to the rest of the population (over 30 years old). The appeal is higher across a wider range of demographics in Spain, reaching 55% attendance in the 16-24 age group
- Whilst the majority of dance attendees are under 35 years old in both markets, with about a third aged between 25-34 years old, the over 40's make up 16% in the UK and a third in Spain
- Overall, the audience is slightly older in Spain compared to the UK, with fewer under 25 years old (18% in Spain vs. 38% in UK)

**In the last three years, dance gigs in clubs or similar venues were most popular for UK attendees (frequented by 60% of dance attendees), while the Spanish were more into beach clubbing destinations (74%)**

**Most attendees have been to more than one type of dance event, with one in seven (14%) in the UK and just over one in five (22%) in Spain having been to all three (festival, gig in a club/ other venue, Ibiza clubbing)**

**Dance attendees are more likely than the overall population to also attend all other event genres**

- In the UK, they are almost twice more likely to have been to a music concert/ gig in the last year (78% vs. 42% of the overall population) and almost three times more likely to have been to a music festival (63% vs. 23% of the overall population)
- In Spain, 81% of dance attendees went to music concerts (vs. 61% of the overall population) and 80% went to sports events (vs. 58% of the overall population)

**Lack of interest in dance music is the main barrier-to-entry for non-attendees**

- The second highest barrier for non-attendees is age (feeling too old)
- However, cost is the strongest reason preventing current UK attendees from going to dance events in the future, whilst the Spanish view travel logistics or distance to venue as a stronger barrier (followed by cost, particularly amongst festival goers)

**Attendees rely on widely spread channels, such as social media (Facebook, Twitter and Instagram in particular) and word of mouth, to find out about events that interest them**

- Ticketing websites are also a source of information for one in four across both markets

**The escapist nature of dance events and the freedom associated with attending them are strongly reflected in the way people describe their experiences and their attendance motivations**

- Attendees are driven by factors beyond the music itself, such as the highly social element (joining their friends, meeting new people, connecting with other fans) and the atmosphere
- Music is a greater pull for festivals and gig attendees in the UK, while the social element of the experience is most important for Ibiza goers
- On the other hand, Spanish festival attendees are equally motivated by the music and the experience (dancing, 'once in a lifetime' experience) whilst the atmosphere (e.g visual technology), is a stronger reason to attend for Ibiza goers

**Despite music being a strong pull, attendees' music preferences go beyond the dance genre, with most of them also listening to more 'mainstream' genres such as Pop and Rock**

- Dance events appeal, therefore, to people with a wider spectrum of music preferences
- In support of this, Ticketmaster's transactional data (UK) shows an increase in the number of more 'mainstream' festival customers in the UK (Leeds, Lovebox, Wireless, V festival) who purchased tickets to dance festivals, increasing by 29% between 2012-2014

**Preferences for specific sub-genres of dance or DJs are diverse as well, and they vary between attendees in UK and Spain**

- In the UK, there is a wide appeal for most dance sub-genres, with Urban, Drum & Bass, Electro House and EDM amongst the top preferences. Spanish attendees, however, have a stronger affinity towards Techno, Electro House and EDM
- Two in five dance fans in Spain prefer David Guetta, while in the UK preferences are more varied. Although Calvin Harris is the leading name, a wider range of DJs mentioned paints a more diverse picture of artist affinities
- In general, the 'celebrity DJ' culture looks stronger in Spain compared to the UK – billboard hits and celebrity DJs are the most important elements for the Spanish public, while in the UK a third prioritise keeping up-to-date with the latest music trends and interacting with other fans



EXECUTIVE SUMMARY

**From an industry perspective, dance is seen to be setting the agenda and influencing popular culture**

- Attendees are acknowledging this, with about a third in both markets agreeing that dance music is becoming more mainstream – but they are generally more positive than negative about it
- Consumer interpretation of 'mainstream' generally translates to positive terms such as 'more popular', 'wider reach', 'more visible', rather than inauthentic or alienating

**Access to more affordable technology makes it easier for non-professionals to also produce dance music**

- One in ten UK attendees and 5% in Spain, fall into this category

**Creating and sharing content on social media is an integral element of content consumption, as well as of event attendance in general**

- Seven in ten attendees use Facebook and other social media to post about their favourite events and artists, or to check and share music content in general

- Equally, 68% of UK attendees and slightly fewer (57%) Spanish also upload posts on social media during events they go to
- At dance festivals in particular, Facebook posts are more likely to be published before the event, whilst interaction with Twitter and Instagram is consistent before, during and after the event

**Over two in three attendees in both countries plan their dance festival activity in advance and purchase tickets at least two months before the event (but after line-ups have been announced). One in six, however, book even earlier (at least 6 months in advance)**

- Although the majority book directly from the festival website (over 80% in each market), consideration to purchase from ticketing providers in the future is on the rise (with almost two in three considering this channel)

**Ibiza goers also pre-plan their clubbing activities to some extent, with three in five of Spanish attendees and fewer (one in three) Brits who booked nightclub tickets in advance**

- In terms of likelihood to pre-book in the future, highest appeal is for day/beach parties for the UK audience, and day trips or boat parties for the Spanish

**More than half of festival attendees in the UK are paying over £50 on tickets, with just over one in ten (15%) who are going over £150**

- In Spain however, the majority of festival goers (38%) spend between €21-50, closely followed by those paying between €51-100. Only a very small minority (3%) pay above €150

**Spend on tickets is lower for dance gigs, compared to festivals. The majority of UK attendees usually pay up to £30 and Spanish attendees up to €30**

- However in both markets, almost half are willing to pay more (up to £50/€50) for an event featuring a well-known DJ

**Attendees feel generally positive about measures taken for their safety at dance events (security, medical staff, drug checking and testing etc.), with about two in five acknowledging that organisers are putting effort into making them feel safe**

**Although about one in three in the UK and fewer (one in five) in Spain admit they have taken recreational drugs at dance events, the vast majority do not find this as integral to their event experience**

- This is more likely to be occasional rather than frequent use, and does not differ to their reported behaviour outside of these types of events

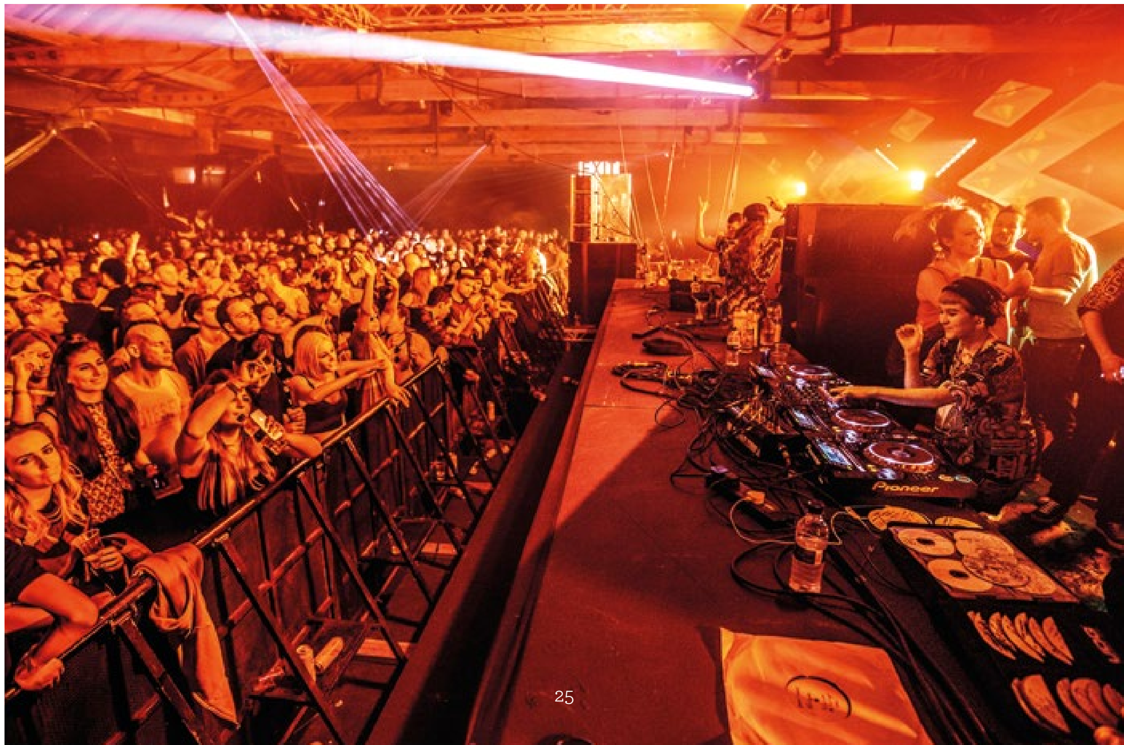




- The majority of overall attendees (40% in the UK and 50% in Spain) find drug taking at dance events off-putting

**The vast majority in both markets (57% in UK, 63% in Spain) acknowledge that sponsors have a key role in making dance events financially possible, with even more people (68% in UK, 66% in Spain) feeling happy for events to be sponsored if this keeps ticket prices down**

- Attendees in the UK feel that alcohol brands are most suitable to sponsor dance events (46%), whilst in Spain electronic hardware brands (41%) are seen as best fit



# DEMOGRAPHICS & ATTENDANCE

# DEMOGRAPHICS & ATTENDANCE

## **DANCE EVENT ATTENDEES** DEMOGRAPHIC PROFILE

*16% of the UK population, and twice as many of the Spanish population (33%), have been to at least one dance event in the last 3 years.*

However, the likelihood to attend differs considerably by age across the two markets:

- In the **UK**, the younger demographics (16-29 year olds) are around four times as likely to have been to a dance event than the rest of the population (30+ y/o), reaching 42% among the 16-19 age group
- There is a higher appeal across a wider range of demographics in **Spain**, ranging from 30% of the 45-54 year olds who went to a dance event, through to 55% in the 16 – 24 age group

### AGE

As expected, dance music event attendees are young – the majority are under 35 y/o (71% in the UK, 52% in Spain) – although the audience is slightly older in Spain compared to the UK, with fewer under 25 y/o.

Whilst in both countries a third of attendees are aged between 25 and 34, over 40's still account for 16% of UK attendees and 33% in Spain.

### GENDER

Dance events on the whole are more female-oriented in the UK (44% males vs. 56% females) and male-oriented in Spain (57% males vs. 43% females) – however this varies depending on the type of dance event (festival, club/venue or Ibiza) and quite often on the festival or club in question.

In the **UK**, 16-24 year olds are the age group most likely to attend club events, with a quarter (25%) of this age bracket having been to one or more of those events. 25-29 year olds are the most likely to go to Ibiza (11%) and 20-24 to dance festivals (24%).

In **Spain**, 16-19 year olds are the age group most likely to attend club events, with two fifths (40%) of this age bracket having been to one or more of those events. 30-34 year olds are the most likely to go to Ibiza (29%) and 25-29 to dance festivals (33 %).

## AGE

UK / SPAIN

| Age | UK | Spain |
|---|---|---|
| 16-19 YRS | 8% | 2% |
| 20-24 YRS | 30% | 16% |
| 25-34 YRS | 33% | 34% |
| 35-39 YRS | 14% | 15% |
| 40-44 YRS | 5% | 10% |
| 45-54 YRS | 7% | 15% |
| 55+ YRS | 4% | 8% |

## GENDER

UK: 56% (female) | 44% (male)

Spain: 43% (female) | 57% (male)

## INCOME

MAJORITY WITH ANNUAL HOUSEHOLD INCOME OF

38% £20-40K

38% €20-40K

## MARITAL STATUS

42% / 36% SINGLE

29% / 34% MARRIED

28% / 24% IN A RELATIONSHIP OR LIVING WITH PARTNER

58%/55% DO NOT HAVE CHILDREN

## EMPLOYMENT

75% / 79% IN EMPLOYMENT

11% / 13% IN EDUCATION

## SEXUAL ORIENTATION

89% / 87% HETEROSEXUAL

8% / 12% GAY, LESBIAN, BISEXUAL





## EDUCATION

UK: 33% A-LEVELS OR EQUIVALENT; BACHELORS DEGREE 29%; 16% POSTGRADUATE QUALIFICATION

Spain: 56% UNIVERSITY DEGREE (OR VOCATIONAL QUALIFICATION); 26% POSTGRADUATE QUALIFICATION

## REGION

| | |
|---|---|
| LONDON | 24% |
| NORTH WEST | 16% |
| SOUTH EAST | 12% |
| YORKSHIRE AND HUMBER | 12% |
| EAST MIDLANDS | 8% |
| SCOTLAND | 7% |
| SOUTH WEST | 6% |
| WEST MIDLANDS | 5% |
| EAST | 4% |
| NORTH EAST | 2% |
| WALES | 2% |
| NORTHERN IRELAND | 2% |

Majority are from **LONDON** and the **SOUTH EAST**, who, when combined, make up 37% of all UK attendees (which is over-indexing on the 27% of the UK population living in these regions).

| | |
|---|---|
| SOUTH | 24% |
| NORTH EAST | 23% |
| EAST | 14% |
| MADRID METROPOLITAN | 13% |
| NORTH (NORTH CENTRE) | 12% |
| CENTRE | 10% |
| NORTH WEST | 6% |

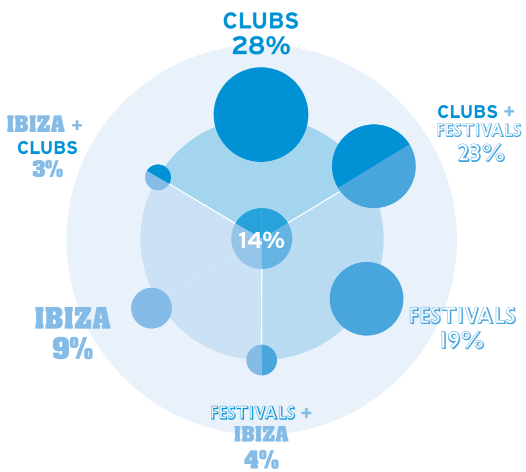
The majority of Spanish attendees are based in the **SOUTH (24%)**, closely followed by the **NORTH EAST REGION (23%)**. Individual regions with highest representation were **ANDALUCÍA (18%)**, followed by **CATALUÑA (17%)** and **MADRID (17%)** – which is in line with the Spanish population.

## ATTENDANCE OF SPECIFIC TYPES OF DANCE EVENTS

In general, people who go to dance events are highly likely to experience them in different shapes and sizes, with a large overlap in attendance between the three types of events – one in seven UK attendees and over one in five Spain attendees have been to all in the last 3 years (festival, club/ gig, Ibiza club).

However, a third of the overall attendees in the UK, and one in five in Spain, only went to events in clubs/ other venues, which makes them the least likely to attend a wider range of dance events and therefore most committed to this type of event.

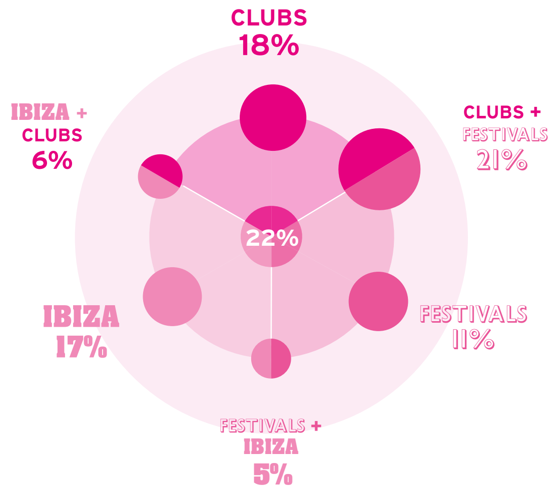
### THE OVERLAP




**14%** have been to **all three** types of dance events

**30%** have been to **two types** of dance events

**56%** have been to **one type** of dance event




**22%** have been to **all three** types of dance events

**32%** have been to **two types** of dance events

**46%** have been to **one type** of dance event

UK
SPAIN





## OVER THE LAST THREE YEARS

| UK | | Spain |
|---|---|---|
| 51% | WENT TO DANCE FESTIVALS | 48% |
| 60% | ATTENDED DANCE EVENTS IN CLUB /VENUE | 55% |
| 56% | WENT TO BEACH CLUBBING DESTINATIONS | 74% |

Significantly more Spanish attendees went to beach clubbing destinations compared to UK

### IN THE UK

Just over half of attendees went to at least one type of dance event, with the highest number of attendees at events in clubs/ other venues (60%)

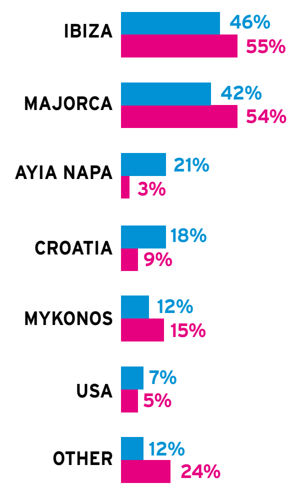
Out of the 'beach clubbers' (56%), just under half went to Ibiza

- *A third of attendees of dance festivals and events in clubs are aged 20-24*
- *Amongst Ibiza clubbers, the 20-29 y/o make up half of attendees*

### IN SPAIN

More attendees went to beach clubs than dance festivals and club events. Also, more people went to beach clubbing destinations in Spain than the UK, which is also driving the overall higher attendance of dance events in Spain.

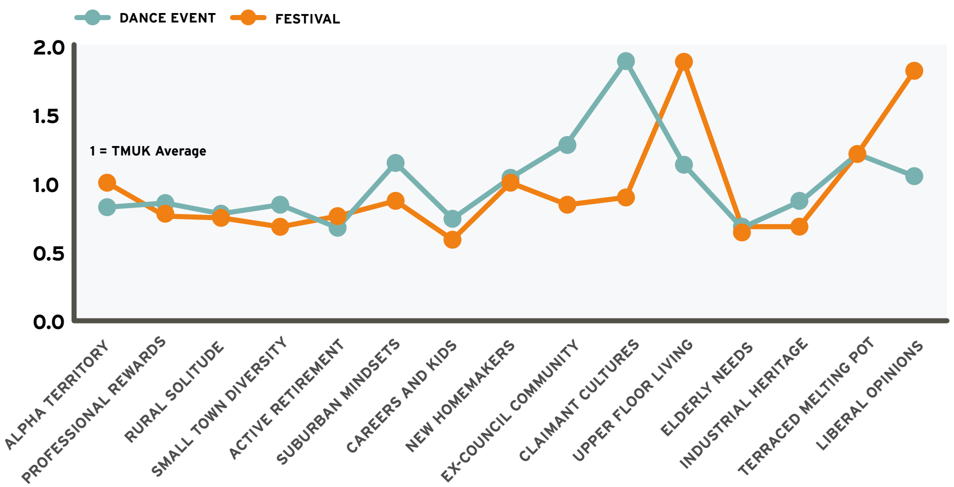
- *Close to 1 in 5 of dance gigs attendees are aged 25-29; a similar proportion of dance festival goers are 30-34, whilst 1 in 4 Ibiza attendees are 30-34*




'Other' includes Spanish beach destinations for respondents in Spain, and a range for the UK (e.g. Zante, Dubai, Turkey, Thailand)

## MOSAIC PROFILE

### YOUNG, URBAN GROUPS HAVE HIGHEST PROPENSITY TO ATTEND DANCE EVENTS/FESTIVALS




Based on Experian's Mosaic socio-demographic consumer classification applied to Ticketmaster's transactional data for the UK:

- Dance events in clubs/venues are generally frequented by young demographics living in urban areas, coming from a mix of high and low affluence (primarily Liberal Opinions and Upper Floor Living segments)
- Festival attendees are more likely to be a mix of low affluence, young and living in urban areas (Claimant Cultures, Upper Floor Living, Ex-Council Communities, Terraced Melting Pot) and high affluence, suburban families – likely to be parents purchasing for children (Suburban Mindsets)

## DANCE FESTIVAL ATTENDEE PROFILE

30% 20-24 YEARS OLD

51% | 49%

12% MIDLANDS
29% LONDON
12% SOUTH EAST

79% EMPLOYED

29% A-LEVELS OR EQUIVALENT

BACHELORS DEGREE 32%

19% POSTGRADUATE QUALIFICATION

40% SINGLE

27% MARRIED

17% IN A RELATIONSHIP OR LIVING WITH PARTNER

20% 30-34 YEARS OLD

40% | 60%

19% CATALUÑA
17% MADRID
18% ANDALUCÍA

74% EMPLOYED

UNIVERSITY DEGREE 55% (OR VOCATIONAL QUALIFICATION)

27% POSTGRADUATE QUALIFICATION

38% SINGLE

33% MARRIED

19% IN A RELATIONSHIP OR LIVING WITH PARTNER

## IBIZA ATTENDEE PROFILE

47% 20-29 YEARS OLD

53% | 47%

12% MIDLANDS
31% LONDON
10% SOUTH EAST

88% EMPLOYED

25% A-LEVELS OR EQUIVALENT

BACHELORS DEGREE 35%

21% POSTGRADUATE QUALIFICATION

35% SINGLE

32% MARRIED

19% IN A RELATIONSHIP OR LIVING WITH PARTNER

23% 30-34 YEARS OLD

41% | 59%

19% CATALUÑA
18% MADRID
20% ANDALUCÍA

83% EMPLOYED

UNIVERSITY DEGREE 58% (OR VOCATIONAL QUALIFICATION)

27% POSTGRADUATE QUALIFICATION

33% SINGLE

40% MARRIED

16% IN A RELATIONSHIP OR LIVING WITH PARTNER

## DANCE EVENT/CLUB ATTENDEE PROFILE

29% 20-24 YEARS OLD

56% | 44%

13% MIDLANDS
26% LONDON
14% SOUTH EAST

75% EMPLOYED

30% A-LEVELS OR EQUIVALENT

BACHELORS DEGREE 32%

17% POSTGRADUATE QUALIFICATION

44% SINGLE

21% MARRIED

20% IN A RELATIONSHIP OR LIVING WITH PARTNER

18% 25-29 YEARS OLD

41% | 59%

21% CATALUÑA
16% MADRID
17% ANDALUCÍA

74% EMPLOYED

UNIVERSITY DEGREE 55% (OR VOCATIONAL QUALIFICATION)

26% POSTGRADUATE QUALIFICATION

39% SINGLE

31% MARRIED

19% IN A RELATIONSHIP OR LIVING WITH PARTNER

## ATTENDANCE IN THE LAST YEAR

Two in five (39%) of dance attendees in the UK went to a dance festival in the last year, a similar proportion (42%) to a beach clubbing destination and just over half (51%) to a gig in a club/ venue.

Club event attendees are the most likely to attend more frequently (close to a third of those who attended in the last year went to 5 or more of these events).

- Next year is looking even more promising, with projected increase in attendance for all three types of events:  69% planning to go to a festival, 80% to a dance gig and 66% to a beach clubbing destination

Similarly, in Spain just over a third (36%) attended dance festivals and a similar proportion (37%) went to club events in the last year, whilst more (60%) went to beach clubbing destinations. Beach clubbing attendees are the most likely to attend more frequently (15% of last year's beach clubbers attended more than 5 times).

- Over the next 12 months, 70% of Spanish attendees are planning to go to beach clubbing destinations, a similar proportion to club / venue events and 65% to dance festivals

**What was the best thing that you remember about the experience?**

*'Favourite DJs being yards away mixing sounds as the whole crowd revel'*

Festival attendee, Female, 35-59, UK, South West



## OTHER LIVE EVENTS ATTENDED

Compared to the overall population, dance attendees are going to more live events in general, and this is true across both markets. Both the British and the Spanish are into music, arts and family attractions, and sports events are particularly popular in Spain

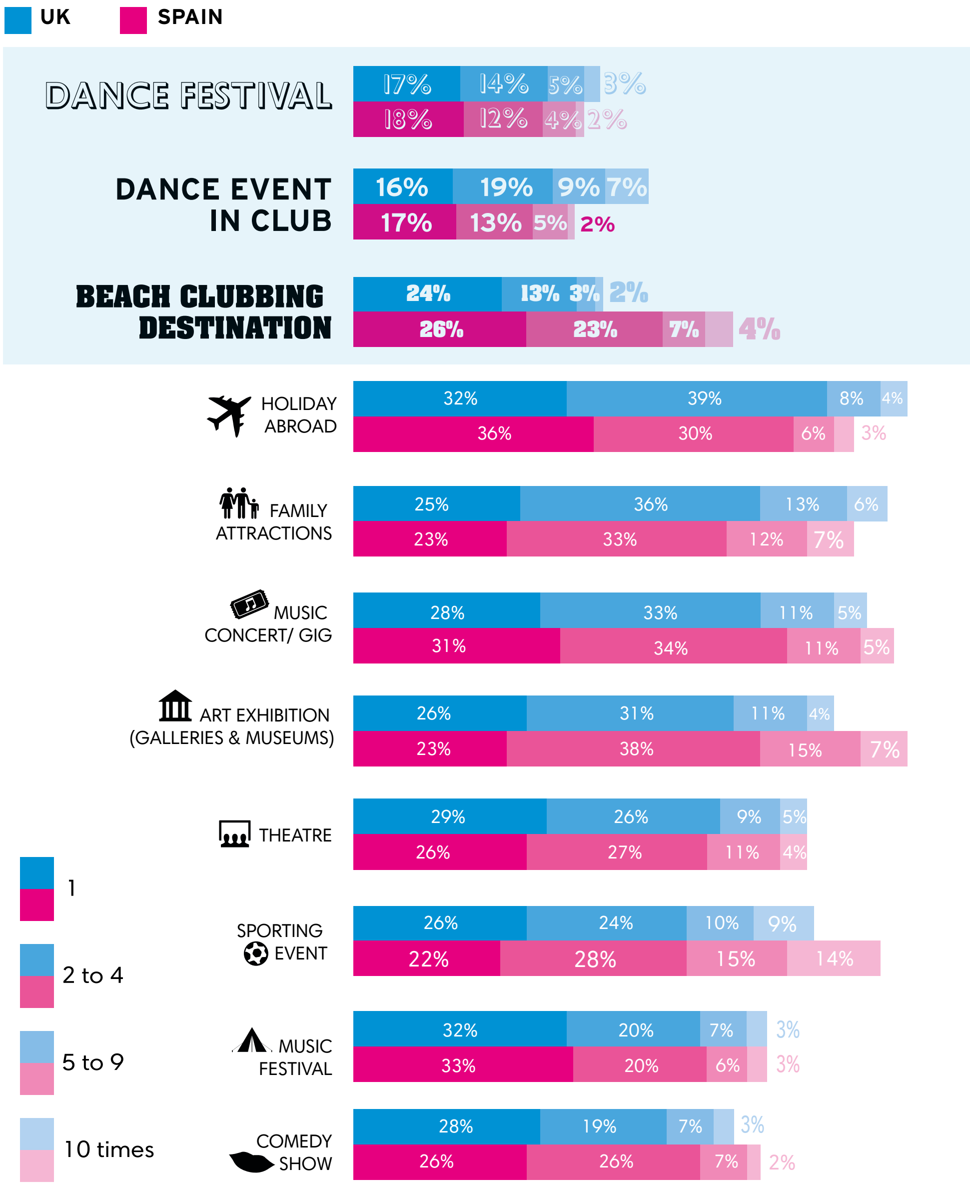
**Music events**

- UK attendees are almost twice more likely to have attended a music concert/ gig (78% vs. 42% of the overall population) and almost three times more likely to have been to a music festival (63% vs. 23% of the overall population) in the last year
- In Spain, 81% of dance attendees went to at least one music concert in the last 12 months (vs. 61% of the overall population)

**Sport events**

- In Spain, 80% of dance attendees went to at least one sport event in the last year (vs. 58% of the general population)

## OTHER LIVE EVENTS ATTENDED








Ticketmaster's transactional data for the UK shows that overall dance attendees in the UK buy more tickets than the average Ticketmaster customer, and to more varied (non-dance) events. Large proportions of dance customers (47% for festivals and 62% for club events) make non-dance purchases on Ticketmaster or TicketWeb (club event attendees have particularly higher affinity towards family events, and festival attendees towards arts).

## SOURCES OF INFORMATION

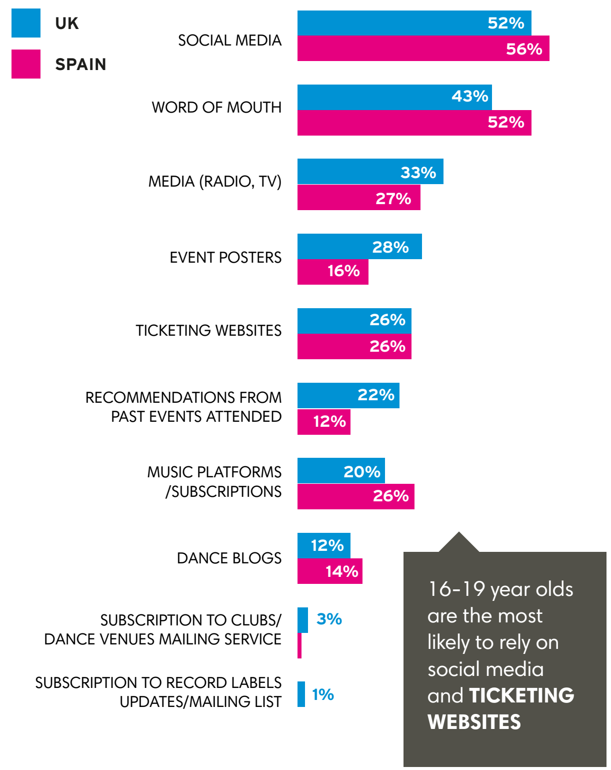
Dance attendees rely on a wide variety of sources to find out about events. It is generally the widely spread channels such as social media, word of mouth and traditional media that are predominantly used, with specialist sources such as dance blogs being used only by a minority (12% in the UK and 14% in Spain).

About half of attendees in each market rely on social media, with Facebook being the most frequently used (by 89% of these), followed by Twitter and Instagram.

And with word of mouth, it's mainly friends' recommendations or their posts on Facebook that are most likely to raise interest and awareness.

One in four attendees refer to ticketing websites as a source of information, of which the majority use the official website and about half rely on the ticketing provider's Facebook page.

### HOW DO THEY FIND OUT ABOUT EVENTS?



## BARRIERS TO ENTRY

Lack of interest in dance music is the primary reason people don't go to dance events (as stated by those who did not attend a dance event in the last three years). Although slightly fewer are being put off by this in the UK (one in four) than Spain (a third), they are the category least likely to be convinced to attend these types of events in the future.

Interestingly, age is the second highest barrier (18%); this starts being a 'deal-breaker' for the over 35 y/o and is increasing gradually for the older demographics – which comes as no surprise given the fact that most attendees fall in the under 35 age bracket.

Whilst music taste and age are things that can't be controlled by event promoters, other barriers that people mentioned could, in fact, be addressed.

Tweaks in price, promoting more 'intimate' events in smaller venues or more accessible locations could all contribute to an increase in the number of new dance attendees. Even so, only a very small minority of non-attendees (4% in the UK and 8% in Spain) are saying they are likely to attend in the next year.

On the other hand, there are things that can potentially stop current dance attendees from going as well or going more frequently. Whilst in the UK cost would be the main inhibitor across all genres of dance events, Spanish attendees view location/ the need to travel as more off-putting (whilst cost comes second, particularly stronger amongst festival goers).

Events being too busy is one of the main barriers amongst Spanish club event attendees, which doesn't come across that strongly in the UK (where not having someone to go with is more of an obstacle).

Having to book in advance is not an issue for Spanish Ibiza goers (like it is for Brits), but the destination being perceived as 'over-rated' is likely to be more of a barrier.



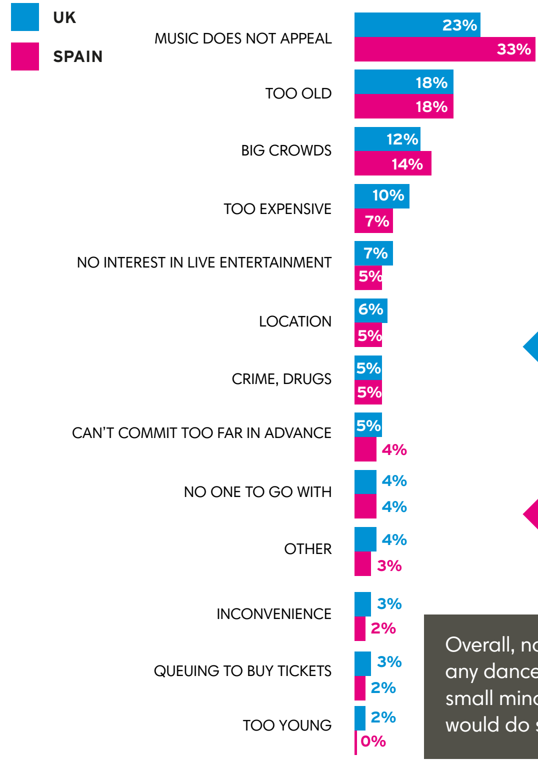
**What was the best thing that you remember about the experience?**

*'Being in a united crowd of like-minded music fans'*

Festival attendee, Female, 25-29 UK, West Midlands

### WHAT PUTS PEOPLE OFF FROM ATTENDING DANCE EVENTS?

**NON - ATTENDEES**




**COST** – likely to be the main barrier amongst attendees in UK, across all types of dance events (26% of Ibiza attendees, 30% of club attendees, 38% of festival attendees)

**LOCATION** – likely to be the main barrier amongst attendees in SPAIN, across all types of dance events

Overall, non attendees are very unlikely to attend any dance event in the future – however a very small minority (4% in the UK and 8% in Spain) would do so.

# *INTERVIEW:* ENRIQUE FERNÁNDEZ PIGEM

## THE SENIOR SALES MANAGER FOR PACHA IBIZA OFFERS INSIGHTS INTO THE EVER EXPANDING DANCE CULTURE OF THE WHITE ISLAND

*Enrique Fernández Pigem has been at Pacha Group since 2004, heading up distribution, tracking and liquidation of official tickets for both Pacha Ibiza and Destino Ibiza*

**ENRIQUE FERNÁNDEZ PIGEM**
SENIOR SALES MANAGER, PACHA IBIZA

**Q: How important is the club scene to the continued growth of the dance music business?**

**EFP:** Clubs, and especially the ones in Ibiza, have an important role in the dance music business. For five months the most important DJs in the world, of all genres, make Ibiza their home, and what becomes a trend here slowly moves to the rest of the globe. It's the same with the business side, some of the clubs in Ibiza are considered the best in the world, and many things that you see in Ibiza are adapted abroad.

It all goes together, the rise of the genre, of festivals and of clubs. I find it positive that major festivals like Tomorrowland or Ultra Music Festival stream their events, making it more accessible to a bigger audience. That audience then sees a line-up at the club and remembers 'Oh, I saw this DJ at UMF and it was amazing'. It's a way to make the genre more accessible, especially online, and that benefits the clubs.

**Q: How has the boom in EDM altered the business and culture of dance music?**

**EFP:** On the side of the business, the fees for artists have increased notably. DJs are the stars of the show and they know it, and they get paid accordingly to the expectation and sales they generate, like footballers.





As for the culture of dance music, the audience has changed in the past few years and now people seem to care less about which track the DJ is playing; just as long as it's the #1 DJ they're seeing.

**Q: Is there still a demand among fans for an underground dance culture?**

**EFP:** Yes, there is. It's true that we are in a boom of EDM parties with superstar DJs like David Guetta, Steve Aoki or Avicii working really well, but not everybody likes this type of music and there are venues that have found their niche in the market with underground nights.

For example at Pacha we have Insane on Friday nights, a night for underground lovers, with artists like John Digweed, MK or Hot Since 82. We started this residence in 2013 and it's been a huge success for us, and in the same way other clubs with an underground culture have had good seasons in Ibiza.

**Q: How do you see the dance music business evolving in Ibiza over the next few years?**

**EFP**: In Ibiza I'd expect some venues to reduce the number of weekly parties and some even closing, the same with some boat parties. In the past five years we've seen more clubs, beach clubs and boat parties emerging; there's such an unbelievable and large variety of options for clubbers and yet not enough demand to cover all these new parties. The 'cake' of tourism has slightly increased but now there are many more players in the game, there's not enough slices for everybody.

# PREFERENCES & MOTIVATIONS

# PREFERENCES & MOTIVATIONS

## MOTIVATIONS TO ATTEND

*So, what brings people together at dance events?*

Content (the music) and the social element of the experience are the strongest motivations, although they differ in terms of priority or intensity both by market, and by type of dance event. Overall, these can be grouped into four broad themes:

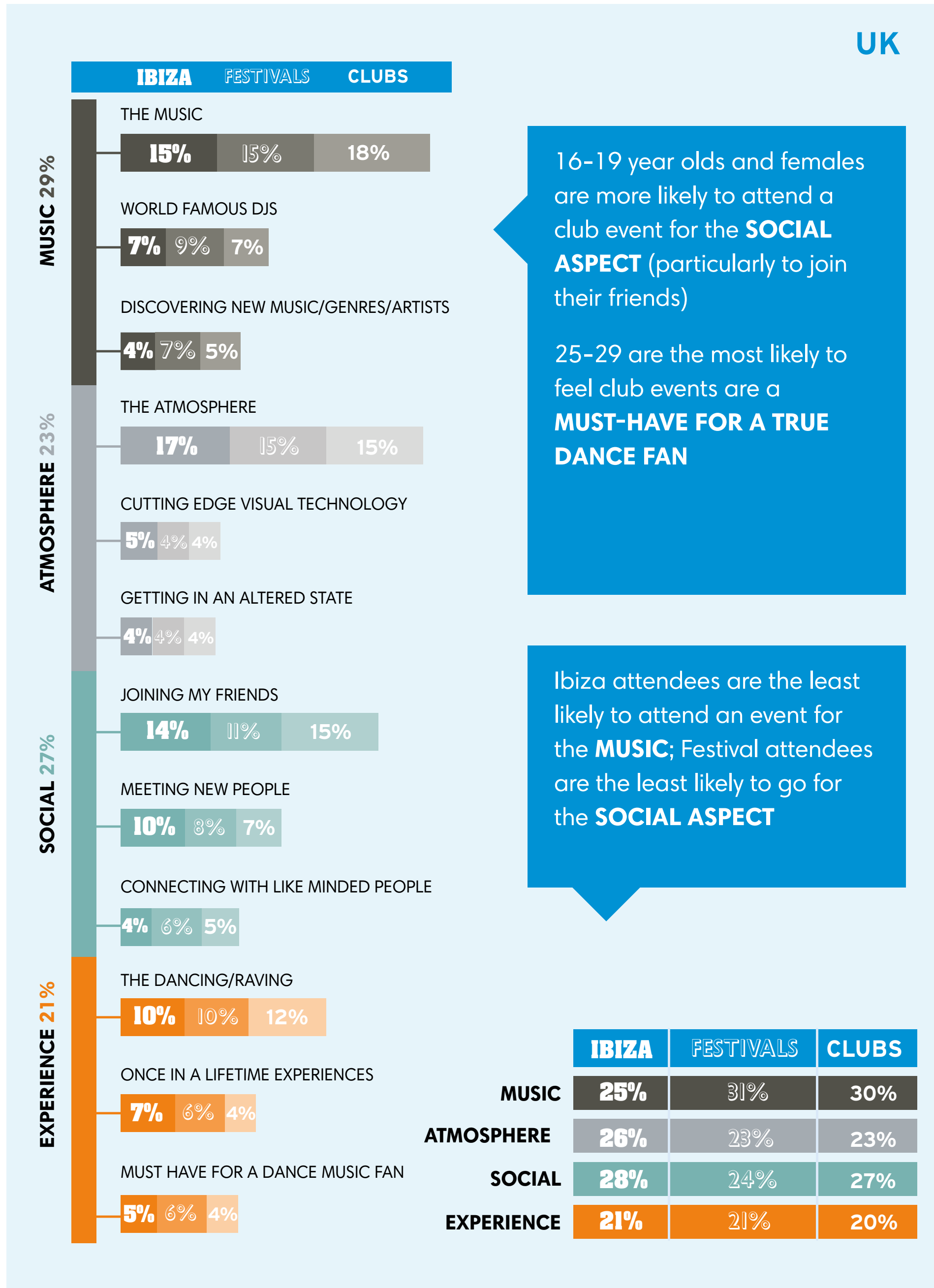
- **The music** (in general, as well as interest in discovering new artists or music genres and seeing world famous DJs)
- **The atmosphere** (in general, as well as visual technology or others, such as 'getting in an altered state')
- **The 'social' element** (the people): joining friends and, to a lesser extent, meeting new people
- **The experience** (such as the dancing/ raving, 'once in a lifetime experience', 'must have for a true dance fan')

Looking at motivations thematically, the music overall is a greater pull for festival and gig attendees in the UK, whilst the social element of the experience (going with friends, meeting new people) is most important for Ibiza goers. However for the Spanish attendees, the atmosphere is the strongest reason to attend for Ibiza goers, whilst festival goers are equally driven by the music and the experience. Club attendees in Spain prioritize elements of the experience (particularly the dancing) over anything else. Joining friends is a recurring theme; this, together with wanting to meet new people – which is also important even though to a lesser extent – shows that the social element of dance events appeals strongly, and reasons for attendance go beyond the obvious interest in the music genre or famous DJs.

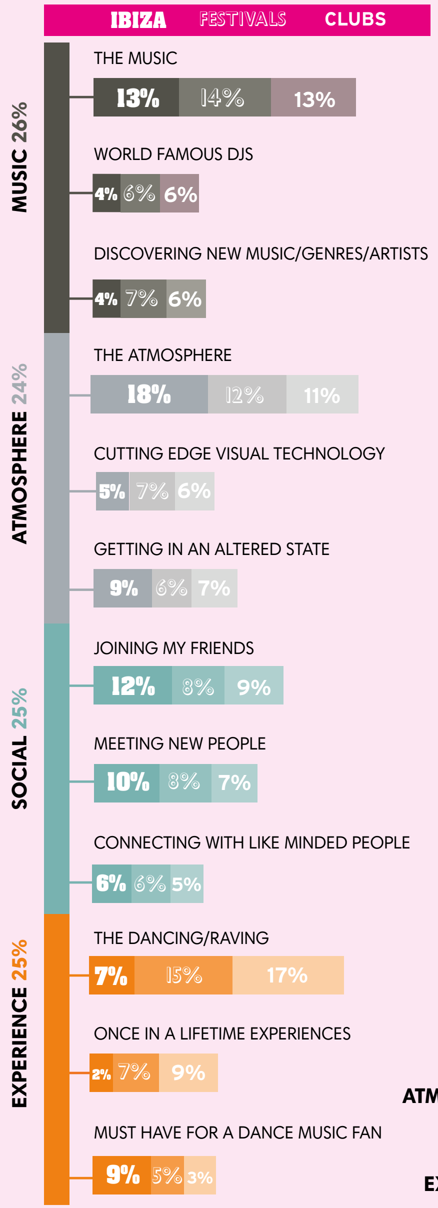
- Dance events are very much social events, being attended in groups of three to five people (over half) or even larger. One in three dance festival attendees, and slightly fewer Ibiza goers (one in four) go in groups of six or more people
- 85% have met other people at a dance festival, the majority of which stayed in contact with them (88% in UK and 86% in Spain) One in three meet between three to five people at a festival







## SPAIN




20-29 year olds are the most likely to attend a club or dance festival because it is a once in a lifetime experience

Ibiza attendees are more motivated by the **ATMOSPHERE** and **SOCIAL ASPECT** and less by the **MUSIC** and **EXPERIENCE**

| | IBIZA | FESTIVALS | CLUBS |
|---|---|---|---|
| MUSIC | 21% | 27% | 25% |
| ATMOSPHERE | 33% | 24% | 21% |
| SOCIAL | 28% | 21% | 22% |
| EXPERIENCE | 18% | 27% | 28% |





Recalling **the most memorable experience** of attending a dance event, respondents primarily refer to the escapist nature of the experience and the freedom associated with it, as well as the people they connected with. A vivid picture of the atmosphere (the music, the lasers, the artists, the 'madness' of the crowd) comes across particularly strong in relation to festivals.

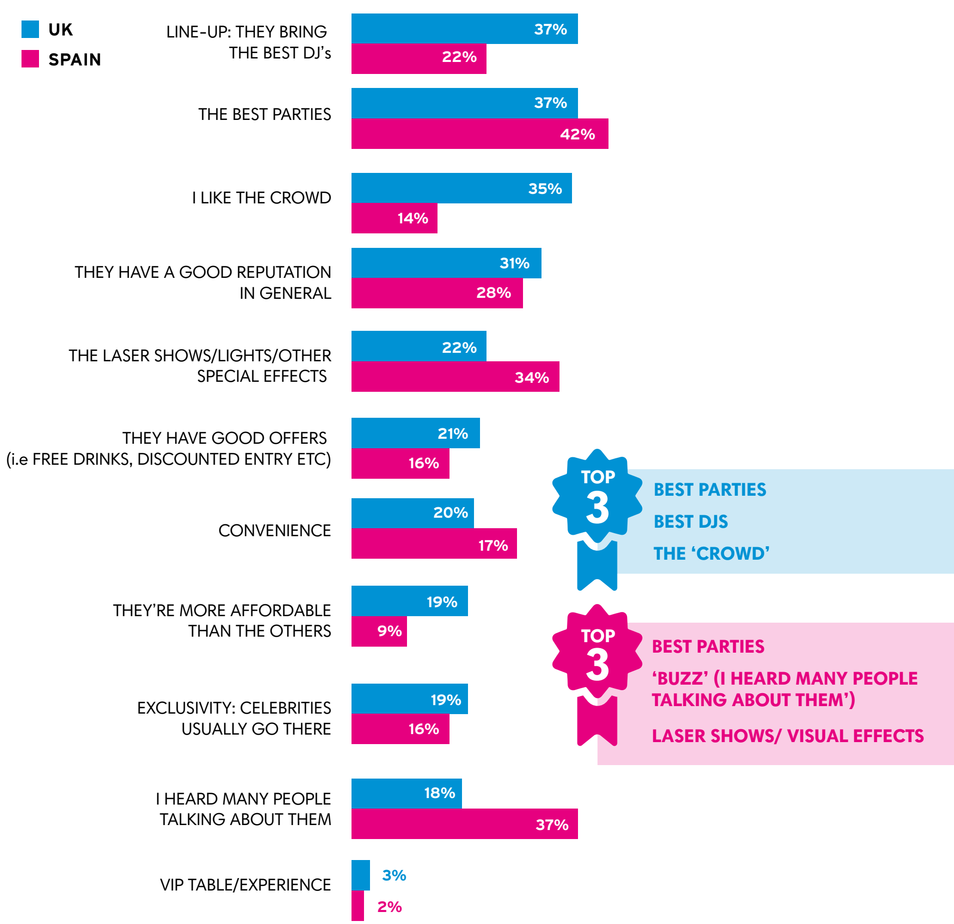
- One in five attendees of dance festivals mentioned freedom (in the UK) and escapism (in Spain)
- One in four dance gig attendees primarily associate the event with being with friends (UK), whilst losing inhibitions and freedom are the primary associations amongst Spanish attendees
- Similar to dance |festivals, attendees associate Ibiza clubbing with freedom (UK) and escapism (Spain)

| | | |
|---|---|---|
| DANCE FESTIVALS | 19% FREEDOM | 21% *Escapism* |
| DANCE EVENT IN CLUB | 25% BEING WITH FRIENDS | 17% FREEDOM |
| IBIZA CLUBBING | 23% FREEDOM | 20% *Escapism* |

With regards to **clubbing in Ibiza,** for Brits the music (line-up/ best DJs) and the quality of the parties are equally important, followed by the people or the 'crowd', when selecting which clubs to go to.

Although the parties are amongst the main criteria in club selection for the Spanish as well, the 'buzz' is almost as important (37%) and is actually twice more influential than for Ibiza goers in the UK. Laser shows and other visual effects are also more relevant for the Spanish audience.

## WHAT DRIVES THEIR PREFERENCES FOR CLUBS THEY GO TO








## WHAT KIND OF MUSIC ARE THEY INTO?

Despite music being one of the main motivations to attend, regardless of the type of dance event, not all attendees of festivals, gigs or clubbing by the beach have selected dance amongst their top music preferences. The music genre itself is on the 'favourites list' for 63% of UK attendees and fewer Spanish attendees (51%). Dance events therefore also appeal to people with a wider spectrum of music preferences, particularly the more 'mainstream' genres like Pop and Rock.

In both markets however, festival attendees are most likely to be more into dance compared to Ibiza goers or club event attendees; this difference between the groups of attendees is stronger in Spain though.

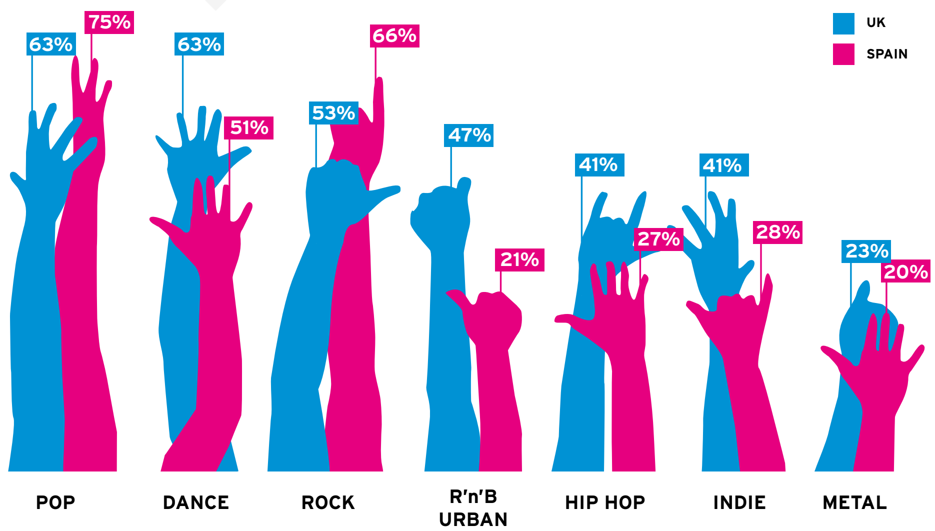
Based on Ticketmaster's transactional data for the UK, the highest overlap between customers who buy dance festival tickets and tickets to other music events is for 'lad rock' (such as Kings of Leon), '90's pop' favourites (such as Robbie Williams) and 'noughties pop' (including Rihanna) as defined by its internal genre clusterisation.

**LISTEN TO DANCE - BY TYPE OF DANCE EVENT ATTENDED**

74% DANCE FESTIVALS ATTENDEES 72%

72% DANCE CLUB ATTENDEES 62%

69% IBIZA GOERS 55%

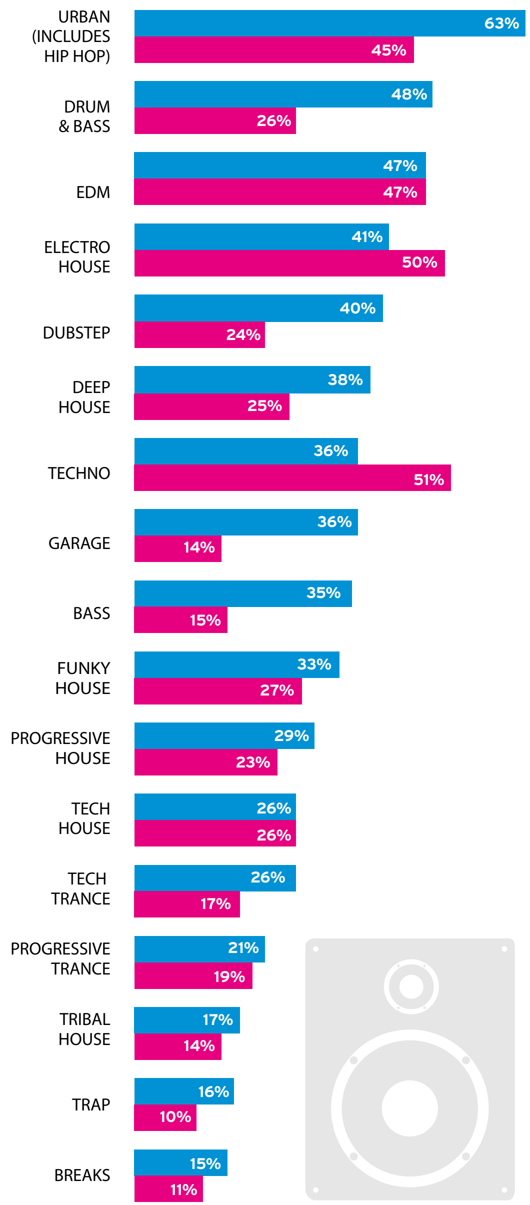


But with dance being as fragmented a genre as it is, fans' affinities are also diverse. In the UK, there is generally a wide appeal of most dance sub-genres, with little difference between the top and bottom of the preference list (with Urban genres, Drum & Bass, Electro House and EDM being amongst the top preferences, and Progressive Trance, Trap and Breaks at the bottom). However in Spain we see a much stronger affinity towards Techno, Electro House and EDM, with half of respondents selecting these as their top choices.



PREFERENCES & MOTIVATIONS

## PREFERRED DANCE SUB-GENRES




TOP

TOP PREFERENCES AMONGST
**DANCE FANS**

**URBAN (63%)**
**DRUM & BASS (48%)**
**ELECTRO HOUSE (41%)**
**DEEP HOUSE (38%)**
**EDM (47%)**

**FESTIVAL AND IBIZA** attendees are more likely to prefer:

**DRUM & BASS (56%)**

TOP

TOP PREFERENCES AMONGST
**DANCE FANS**

**TECHNO (51%)**
**ELECTRO HOUSE (50%)**
**EDM (47%)**

Compared to the UK, preference for **TECH TRANCE** and **ELECTRO HOUSE** is stronger in Spain

Little difference in preference between the 3 groups of dance event goers except for **CLUB ATTENDEES** who are less likely to prefer **TECHNO**

# FAVOURITE DJS AND VENUES AMONG DANCE FANS

Two in five dance fans* in Spain have a clear favourite DJ, David Guetta. Although there were other names mentioned (mostly Tiësto, Avicii), the 'celebrity DJ' culture is stronger in Spain than in the UK, where preferences are more fragmented/ varied. Calvin Harris is the leading name amongst UK favourites, followed by Guetta and Avicii, but a wider range of DJs paint a more diverse picture of dance preferences amongst the Brits (Tiësto, Disclosure, Martin Garrix, Armin van Buuren, Fatboy Slim, Annie Mac, deadmau5 etc).

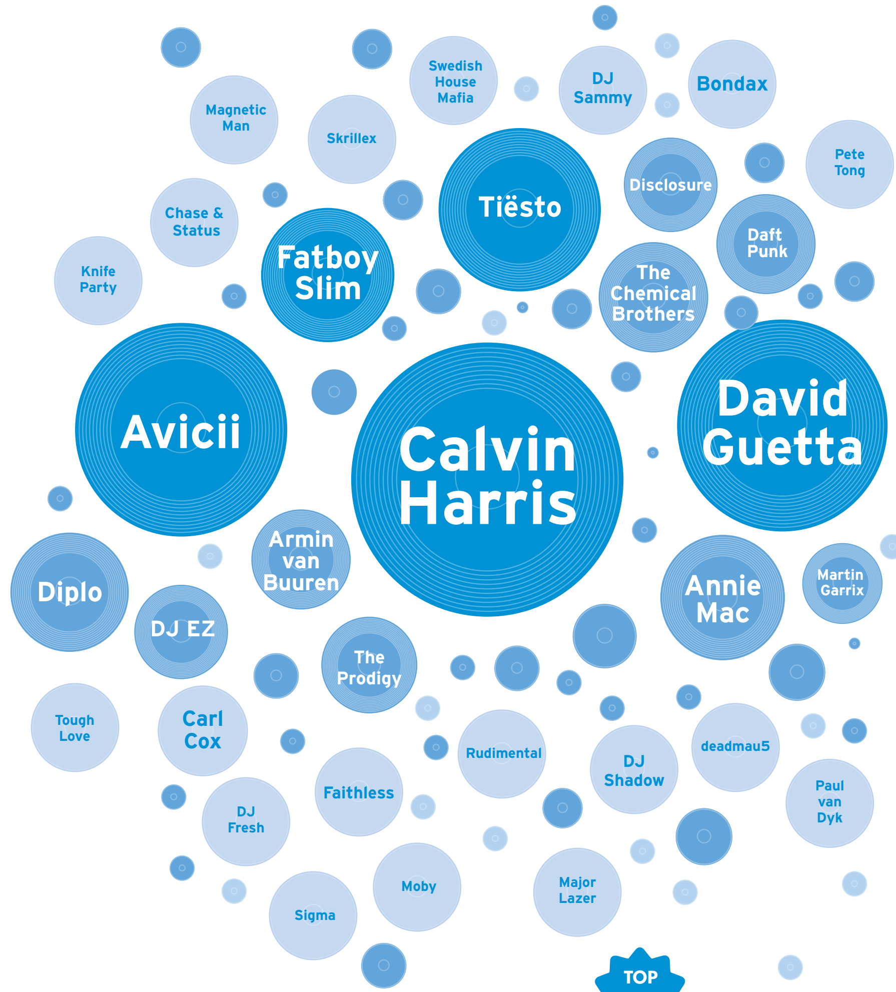
*defined as dance attendees who selected dance among their favourite music genres – 63% of UK dance attendees and 51% of Spanish





## UK

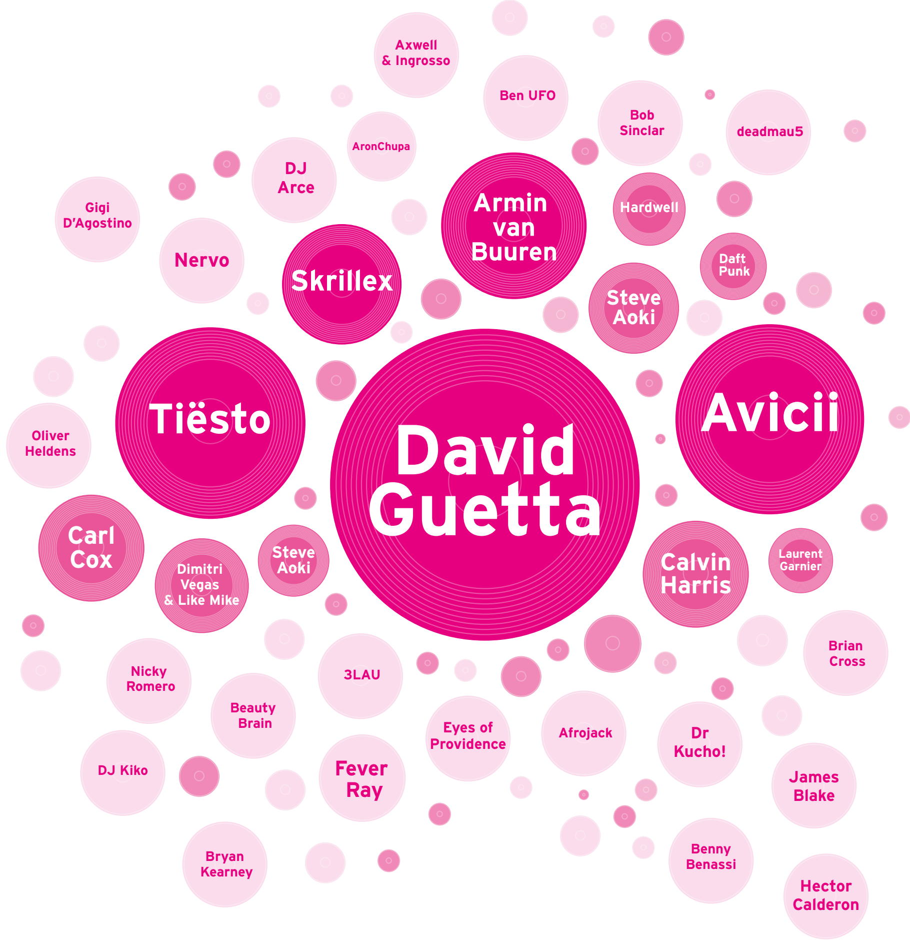
## FAVOURITE DJS - AMONG DANCE FANS




TOP 5

CALVIN HARRIS **11%**
DAVID GUETTA **8%**
AVICII **5%**
TIËSTO **4%**
FATBOY SLIM **2%**

## SPAIN
### FAVOURITE DJS - AMONG DANCE FANS




TOP 5

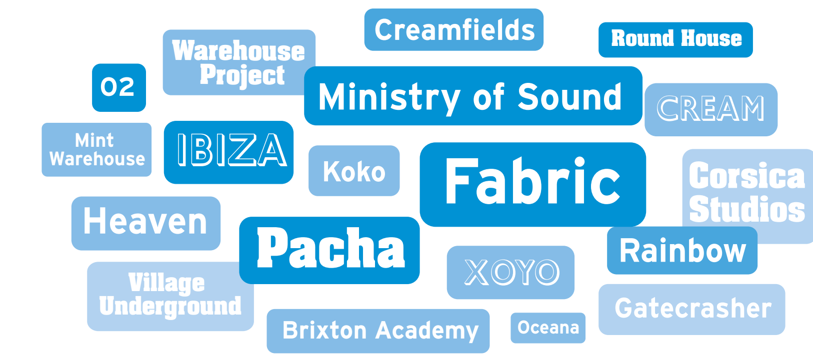
DAVID GUETTA **39%**
TIËSTO **8%**
AVICII **8%**
SKRILLEX **4%**
ARMIN VAN BUUREN **3%**





As for **favourite venues**, it's mostly the big club names in London that are the favourites for UK dance fans (Fabric, Ministry of Sound, Warehouse Project), however clubs and parties in Ibiza are also frequently mentioned (particularly Pacha and Cream), as well as Creamfields UK festival. For Spanish dance fans it's the **outdoors spaces** that are most appealing for dance events (beach, stadiums, festivals etc.), followed by Razzmatazz and Ibiza clubs.

## UK
### FAVOURITE VENUES - AMONG DANCE FANS



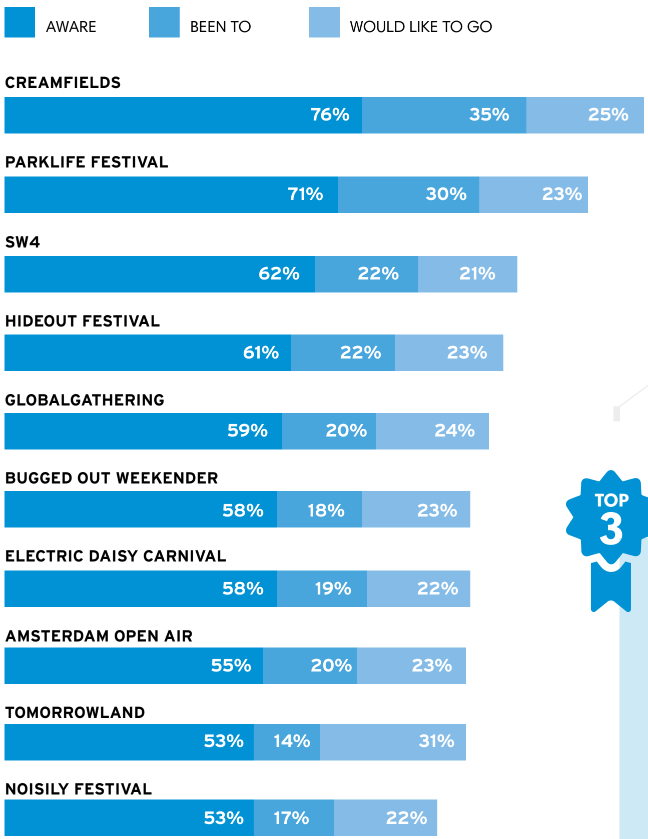

## SPAIN
### FAVOURITE VENUES - AMONG DANCE FANS

# DANCE FESTIVALS

Most festival goers in the UK have heard of the majority of the big, European festivals – awareness ranges from 44% who have heard of Sensation and Eastern Electrics, to 76% who heard of Creamfields UK.

Although actual attendance is highest for local UK festivals (with 35% having been to Creamfields and 30% to Parklife), there is a strong interest in international festivals as well, with 31% saying they would like to go to Tomorrowland. This does not come as a surprise as more than half (52%) find international festivals more appealing than local festivals.

## TOP 10 FESTIVALS FOR UK ATTENDEES (RANKED BY AWARENESS)




TOP 3

MOST WELL-KNOWN AND ATTENDED FESTIVALS ARE LOCAL

**CREAMFIELDS**
**PARKLIFE**
**SW4**

**TOMORROWLAND** had the largest proportion of respondents wanting to attend in the future (31%), with little difference in appetite for the remaining festivals

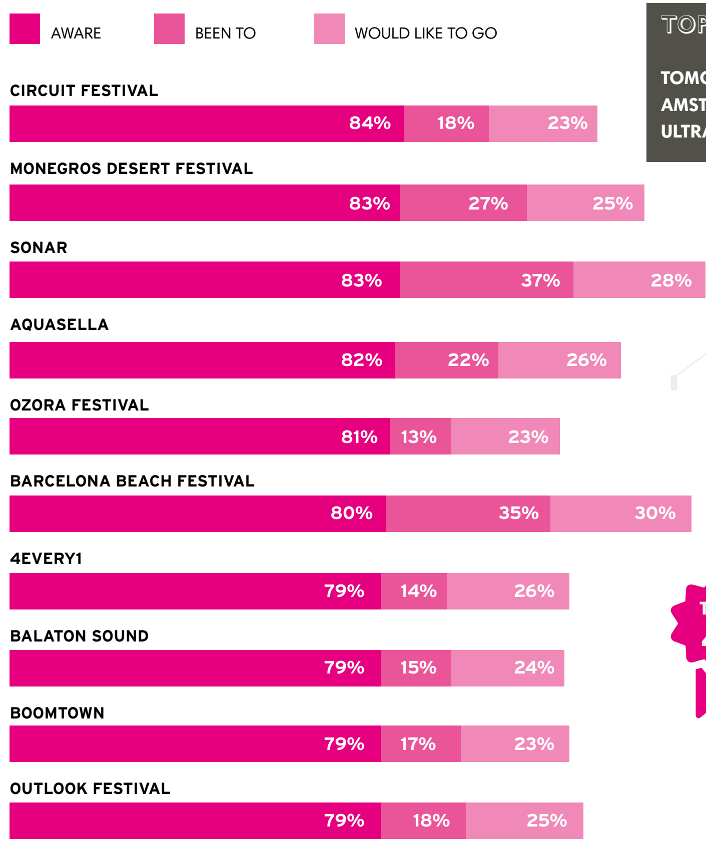




Similarly amongst Spanish festival goers, attendance levels are highest for festivals in Spain (especially Sonar, Barcelona Beach Festival and Monegros Desert), but some international ones have a strong appeal, such as Tomorrowland (46%), Amsterdam Open Air (39%) and Ultra Europe (37%). Interestingly, the Ozora festival in Hungary is just as well-known as some of the most popular local festivals, Barcelona Beach included.

However, local Spanish festivals have a greater pull for Spanish attendees (than UK festivals on UK attendees), with 65% finding these more appealing than international (35%).

## TOP 10 FESTIVALS FOR SPANISH ATTENDEES (RANKED BY AWARENESS)




TOP 3 WOULD LIKE TO GO

**TOMORROWLAND (46%),**
**AMSTERDAM OPEN AIR (39%)**
**ULTRA EUROPE (37%)**

TOP 4

SPANISH LOCAL FESTIVALS MAKE UP THE TOP 4 IN TERMS OF AWARENESS AND ATTENDANCE.

46% would like to go to **TOMORROWLAND** in the future

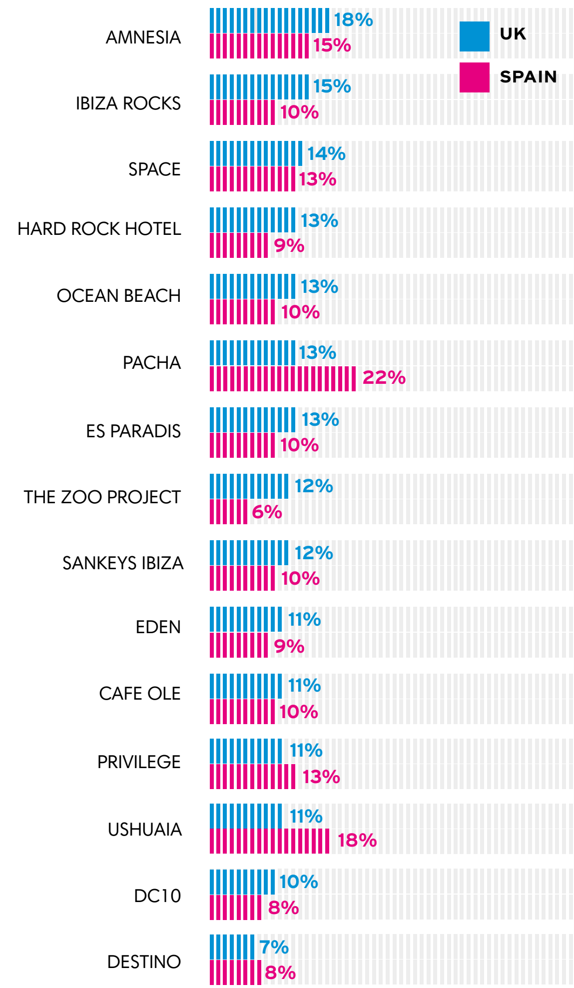
# IBIZA CLUBS

As for Ibiza, the British have different preferences to the Spanish when it comes to favourite clubs – Pacha and Ushuaïa are the clear 'leaders' amongst the Spanish clubbers, though the difference between the most and least favourite is not massive for British Ibiza goers (18% mentioning Amnesia vs. 7% referencing Destino). We see a similar trend on favourite parties, with Spanish attendees most likely to prefer SuperMartXé and Matinee, and the Brits more into private parties, Insane or Together.

In terms of actual attendance, Ibiza Rocks, Pacha and Hard Rock Hotel attract most of the British clubbers, whilst Pacha and Amnesia are more likely to be frequented by the Spanish.



## FAVOURITE CLUBS

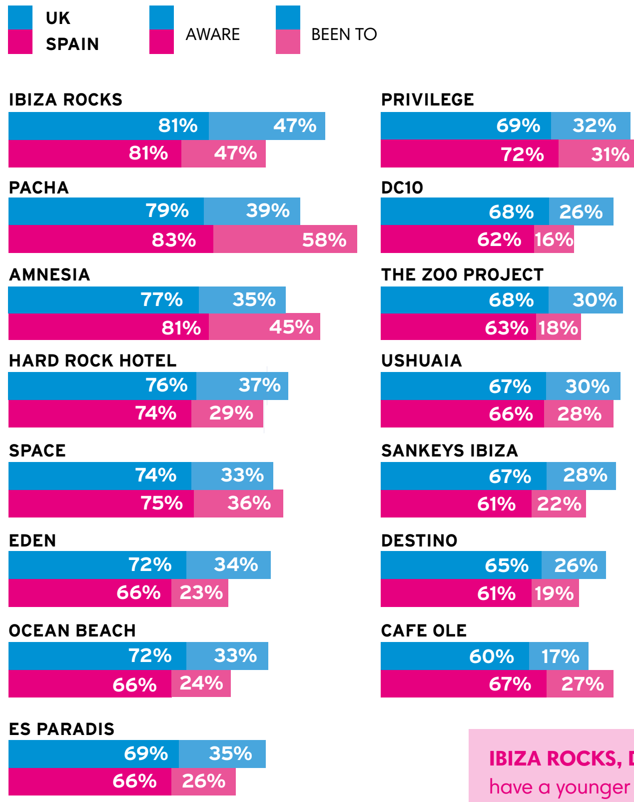



Spanish attendees tend to favour clubs in the Playa d'en Bossa/ Ibiza town area. The British do not seem to follow a pattern





## IBIZA CLUBS AWARENESS AND ATTENDANCE




**What was the best thing that you remember about the experience?**

*'Everything just went mad when the bass dropped... it was literally mad and impossible to describe, I'd totally do it all over again'*

Festival attendee, Male, 20–24 UK, North West

Over half of each club's attendees are under the age of 30; **SANKEYS** has the youngest demographics (64% under 30 y/o) whereas **SPACE** has the oldest (46%)

**PRIVILEGE** has the highest proportion of males (61%), **IBIZA ROCKS** has the lowest (49%)

**AMNESIA** attendees drink the most (61% have 5+ drinks, 25% 10+ drinks)

**PACHA, SPACE,** and **SANKEYS** have more attendees motivated to attend because they have the best parties (46%); **AMNESIA** and **HARD ROCK HOTEL** for the line-up (47%), **CAFÉ OLE** for visual effects (32%)

**IBIZA ROCKS, DESTINO,** and **THE ZOO PROJECT** have a younger crowd compared to the others (more under 30s); **ES PARADIS** and **USHUAÏA** are more likely to have 40 y/o attendees

**SANKEYS** has the highest proportion of females (43%), although males still dominate attendance for the clubs; **ZOO PROJECT** and **AMNESIA** have the highest proportion of males (64%) out of all the clubs

Biggest drinkers: **DESTINO** (39% have 5+ drinks)

**DESTINO** attracts attendees who are more likely to be motivated to go to Ibiza clubs because they are affordable (17%); **DC10** attendees go because it's convenient (44%)

**DESTINO** attendees are more likely to feel dance is a big part of their life

# *INTERVIEW:* JAMES SUTCLIFFE

## THE HEAD OF TOURS AND EVENTS AT MINISTRY OF SOUND OUTLINES THE CHANGING ROLE OF CLUB CULTURE

*James Sutcliffe runs Ministry of Sound's global touring business, overseeing 1000+ events a year in over 50 countries, in addition to helping foster the brand's partnership and experiential activities*

JAMES SUTCLIFFE
HEAD OF TOURS & EVENTS
MINISTRY OF SOUND

**Q: What in your mind has driven the recent boom in dance culture?**

**JS:** There are several contributing factors. Music moves in cycles. Right now there are fewer kids picking up guitars and starting bands. Instead they are turning to electronic music, and I would certainly say that technology and the tools that are at people's disposal, through which they can promote themselves, are far more abundant now. What this creates is a huge amount of variety and easily accessible channels of consumption. Then there is the explosion in the number of events now that cater for dance music fans in order to meet this extra demand.

Several years ago, the dance tent at a festival was an after hours affair that to the average festival goer, was a pretty intimidating experience. These days most major festivals are geared more towards dance music than any other genre.

**Q: Many fans cite 'the experience' as being a crucial component of the dance music spectacle. How are venues meeting this expectation head on?**

**JS:** Not every venue is able to diversify its offering and in fact some venues are purely geared towards the music which is just fine. Those that have the resources to do so have certainly embraced the fact that people want to come away from an event and feel like they have shared an experience with others. The visual element of a show is an important part of this experience. Venues are now installing incredible light rigs and LED screen walls, enabling laser shows and the introduction of VJs to enhance the production.

As well as the main room, venues are also embracing the explosion of VIP culture. The table service, sparkler led bottle shows and comfortable surroundings are a staple part of many venues now and this offers not only another revenue stream, but a different kind of experience for club goers.

**Q: What core elements make up a successful dance music night?**

**JS:** Successful dance music nights, when you break them down, are products. For me, the best nights pay close attention to detail across all elements of the product mix. Creatively they have a strong concept and visual identity. The marketing and promotion really taps into the consciousness of the target audience and the line up is well thought out and programmed to ensure the night has a journey. The combination of the music and the production are two massively important ingredients that create the 'experience'.

**Q: How do you see the dance music business evolving?**

**JS:** I see brands playing a big part in the evolution of the business. Dance music and its mass market appeal is a huge draw for brands wanting to get in front of this diverse, tech savvy, global audience.

# THE DANCE CULTURE

# THE DANCE CULTURE

One of the recurring themes of the research is that dance events appeal to people on various levels, starting with the music itself but going wider than that. It comes as no surprise, therefore, when keeping up-to-date with the latest music trends is the most important aspect of the dance culture for UK attendees.

However, this is closely followed by interacting with other fans (30% find this important), highlighting again the synergy between the music and the wider appeal of sharing the experience with like-minded people. Also, one in four believes that following artists and events on social media is important – this being strongest amongst Ibiza goers in the UK.

On the other hand, Spanish attendees find billboard hits and celebrity DJs as most important, whilst interacting with other fans is at the bottom of their priority list. UK attendees are actually almost twice more likely to feel interacting with other fans is important, compared to the Spanish.





## IS DANCE PERCEIVED AS 'MAINSTREAM'?

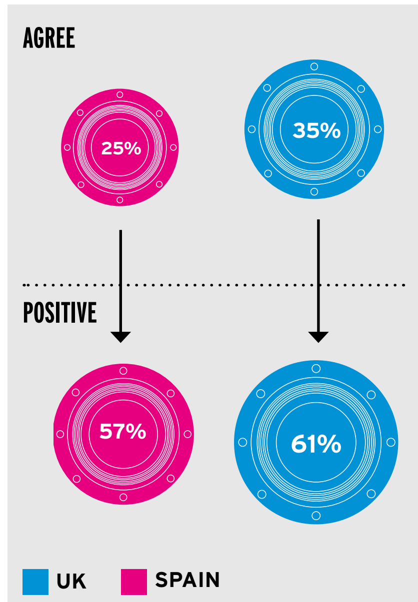
Dance has more recently and quite frequently been portrayed in the media as a genre on its way to becoming 'mainstream', and it is not uncommon for this to have a negative connotation. However, according to dance attendees themselves, though dance is becoming increasingly popular, with more exposure through radio, TV and clubs (making it appealing to a younger, wider audience), this does not necessarily make it mainstream (in a bad way).

Some dance attendees agree that the genre is becoming mainstream (35% in the UK, 25% in Spain), and three in five of them across both markets feel this is a positive thing. Furthermore, their interpretation of 'mainstream' is more likely to be translated in positive terms such as 'more popular', 'wider reach', 'more visible', rather than inauthentic or alienating. They also acknowledge that, whether mainstream or not, there is something for everyone (diverse sub-genres), and for people who don't necessarily like to be associated with mainstream dance, there's always something new to discover which is more 'underground'.

**THE POSITIVES** revolve around the fact that dance is fun to listen to, quality of gigs is increasing (as they attract popular DJ names and venues are impressive/ big stadiums) and this type of music is enjoyed in a social environment (nights out, parties with friends, big festivals).

**THE DOWNSIDES** are that some people feel that increased commercialization would impact the quality of the music (becoming less original), whilst gig prices might be going up. There is also the 'youth element' of it – with good quality festivals and dance events attracting a younger than average crowd who 'attend for the wrong reasons' (rather than to enjoy the atmosphere or the music) which usually generates 'bad press'

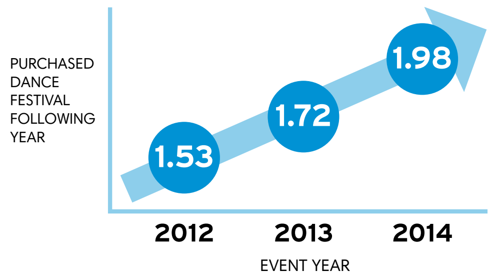
STATEMENT: **DANCE MUSIC IS BECOMING MAINSTREAM**



Dance is also seen to be setting the agenda influencing/ infiltrating popular culture (rather than the other way round).

This is also reflected in festival line-ups, where traditional mainstream/ pop or urban festivals (such as T in the Park, Lovebox, Wireless, Reading/ Leeds and V) are putting more emphasis on bigger dance stages and/ or are more likely to bring DJs as headliners. At the same time, dedicated dance festivals (EDC, Creamfields etc.) are as popular as ever, so there seems to be no cannibalisation there.

Ticketmaster's transactional data for the UK is showing a 29% increase in the number of 'mainstream' festival customers who purchased tickets to dance festivals between 2012-2014.




In 2012 0.4% of Reading and Leeds customers went on to purchase a dance festival the next year, in 2014 that had risen to 1.5%

Ticketmaster's transactional data for the UK is showing that more and more customers are going from mainstream festivals to dance festivals





## CONTENT CONSUMPTION

Generally, UK attendees are more likely to believe that dance music is reflected in their lifestyle, compared to the Spanish, with one in five saying they listen to dance outside of the events they go to, and slightly fewer (18%) agreeing that dance is a big part of their lives. Their attitudes do not differ greatly by the type of dance event attended; however, the frequency of attendance in the last year is more influential, with heavy attendees (i.e those who went to 5+ events) being more likely to agree with each of the statements.

Access to more affordable technology makes it easier for non-professionals to also produce this kind of music, which is another defining aspect of the dance music culture. This is also reflected in the research, which shows that one in ten of UK attendees (and fewer, 5%, in Spain) produce electronic music.

### MINI PROFILE: 'I PRODUCE DANCE MUSIC'


**ETHNICITY:** Fewer respondents who identify as white produce music. Higher proportion of self-identifed Asian or Asian British

### *LESS LIKELY TO HAVE CHILDREN*

'Dance is a big part of my life'

**70% of producers agree with this, vs 12% of non-producers**

*'Following artists on social media is important'*

**67% of producers agree, vs. 19% of non-producers**

*'Interacting with like-minded people is important'*

**72% of producers agree, vs. 23% of non-producers**

'Dance is becoming mainstream'

**66% of producers agree vs. 32% of non-producers**

*'Dance is mainstream – and it's a positive thing'*

**80% of producers agree vs. 53% of non-producers**

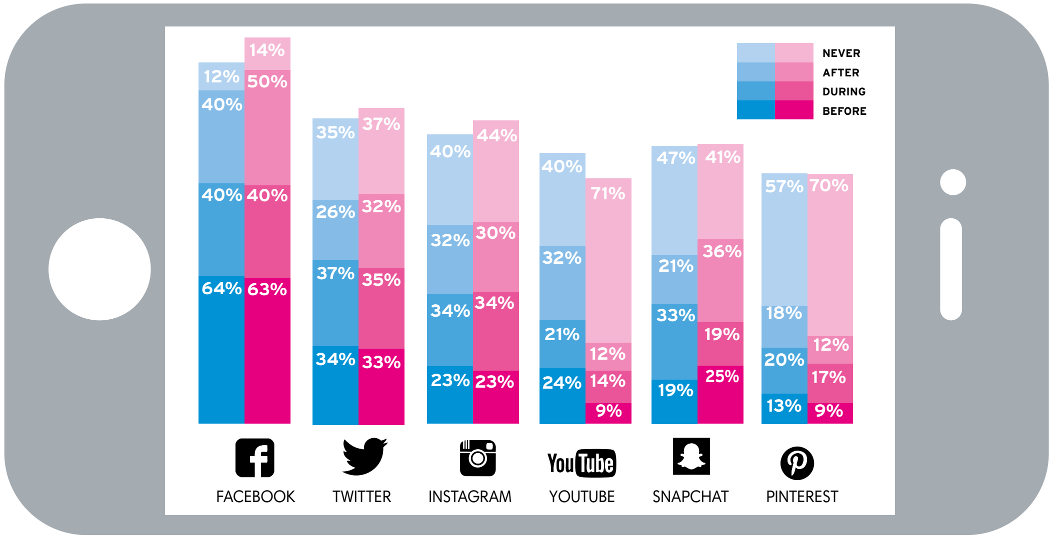
Social media is an integral part not only of the attendance experience, but also of content consumption (the music) in general. An overwhelming majority (just over 70%) use Facebook and other social networks to post about their favourite artists or events, or to check or share music content. Equally, 68% in the UK and slightly fewer (57%) in Spain also upload posts on Facebook, Twitter or Snapchat during the dance events they go to.

- UK Ibiza attendees are the most likely to create and share media content via platforms like YouTube/ Soundcloud/ Vine, and to post on Facebook/ Twitter or use Snapchat during dance music events
- Club/ venue attendees in Spain are the least involved in creating or sharing content via social media or blogs

Strictly in relation to dance festivals, Facebook posts are more likely to be published before the event, rather than as it's developing or after; however this is not the case with Twitter and Instagram, where interaction levels are pretty consistent before, during and after.

## SOCIAL MEDIA INTERACTION AT DANCE FESTIVALS

There is high social media engagement before, during, and after a festival. Only one in ten respondents (UK and Spain) do not use social media at any stage



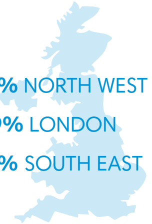





Half of attendees in both the UK and Spain contribute to dance blogs, though fewer than those who are active (create or share content) on social media.

## MINI PROFILE: 'I CONTRIBUTE TO DANCE BLOGS'

53%




MORE LIKELY TO BE EMPLOYED AND LESS LIKELY TO BE STUDENTS COMPARED TO NON-CONTRIBUTORS

**ETHNICITY:** Fewer who identify as white contributing to dance blogs – Higher proportion of Asian or Asian British

*'Dance is a big part of my life'*

**24% of contributors agree with this, vs. 13% of non-contributors**

***'Following artists on social media is important'***

**67% of contributors agree, vs. 19% of non-contributors**

***'Interacting with like-minded people is important'***

**72% of contributors agree vs. 23% of non-contributors**

## IBIZA CLUBBING

As previously noted, 56% of UK attendees and significantly more (74%) in Spain have been to a beach clubbing destination in the last three years, about half of which in both markets went to Ibiza.

### UK

- Most attendees are not exclusively committed to one destination, having been to other beach destinations for clubbing, including Majorca (55%), Ayia Napa (27%) and Croatia (26%)
- 65% of UK Ibiza goers have been to the island multiple times (with a quarter of these being 'heavy' goers who have been more than three times)
- 61% are highly likely to return (highest likelihood from 30-34 y/o), whilst slightly fewer (54%) would be open to going to another similar destination

### SPAIN

- As with UK, there is a big overlap in attendance across beach destinations, such as Majorca (67%), Mykonos (23%) and other Spanish islands such as Menorca, Tenerife and Marbella (12%)
- 73% of Spanish Ibiza goers have been to the island multiple times (with 31% being 'heavy' goers who have been more than three times)
- 70% are highly likely to return, whilst slightly fewer (67%) would be open to going to another similar destination

Whilst the majority of UK Ibiza goers think of the experience mostly by associating it with world famous DJs (63%), iconic parties (63%) and generally cool/ a 'must attend' for dance fans (60%), the Spanish primarily see it as too touristy and expensive, but equally cool.

**What was the best thing that you remember about the experience?**

*'Surrounded by people just enjoying themselves – no hostility or posturing: genuinely communal experience in enjoying the music/event'*

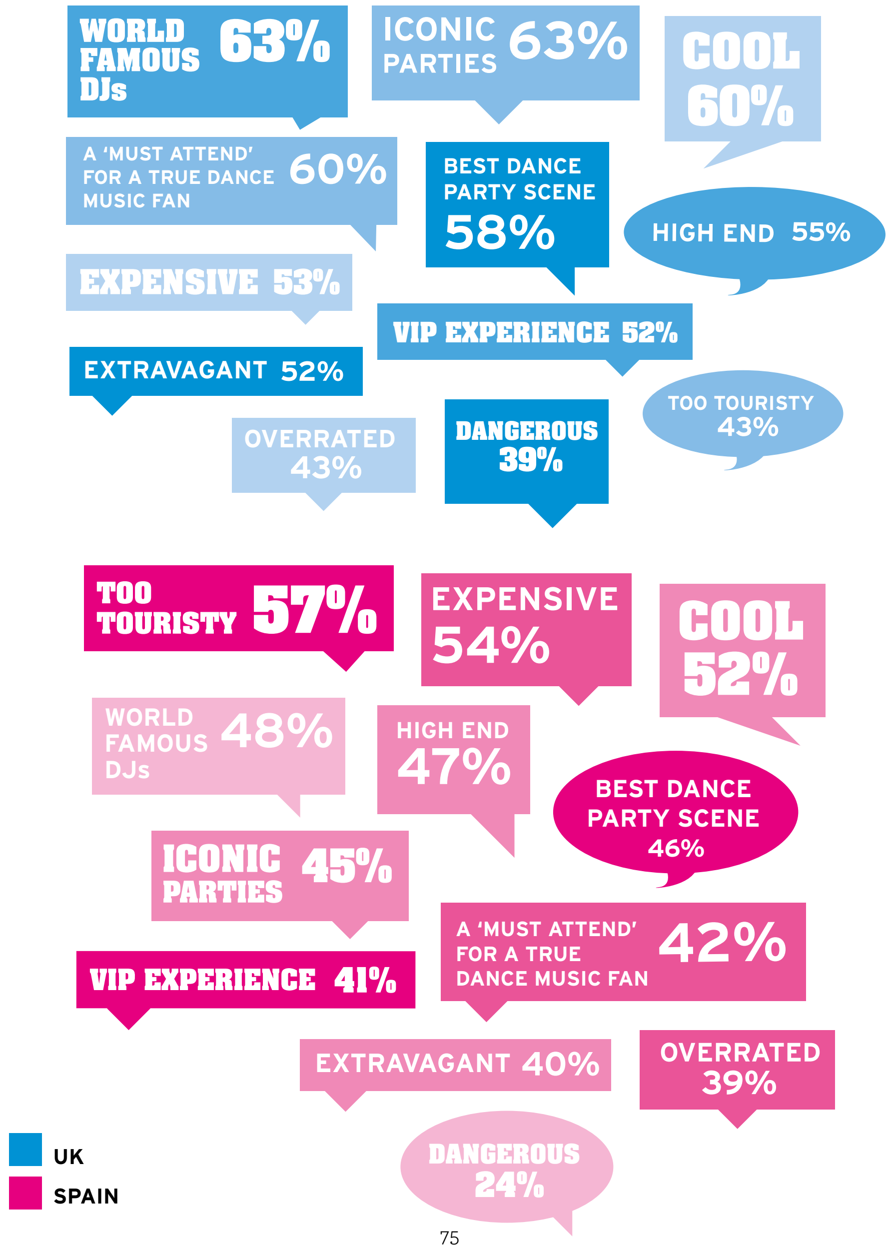
Festival attendee, Female, 40-44 UK, South East





## CLUBBING IN IBIZA

### HOW DO THEY DESCRIBE IBIZA?



# *INTERVIEW:* ANDREW GOLDSTONE

## TIËSTO'S MANAGER UNPACKS THE ROLE OF DANCE MUSIC CULTURE IN A POST EDM WORLD

*Andrew Goldstone is a true dance music industry veteran, signing Fatboy Slim back in the mid 90s to now co-managing one of the world's most successful DJs, Tiësto as part of Red Light Management*

**ANDREW GOLDSTONE**
CO-MANAGER, TIËSTO

**Q: What is it about dance music culture that evokes such a passionate response from fans?**

**AG:** I think it's partially because the experiences that people have at shows and festivals can be life changing; standing in a field with 50,000 other people listening to your favourite DJ has the power to be a very emotional experience and I think that having had that experience people want to feel that again. Going to EDC in Las Vegas and seeing 140K people from all different walks of life, united in their love of dance music is pretty amazing. That kind of community doesn't exist in other scenes. A shared love of dance music is an immediate bond between people even if they like different DJs.

**Q: How has the explosion of EDM changed the perception of dance globally?**

**AG:** Dance music is and always has been somewhat of a dark horse. Despite having some commercial success, much of the dance music world exists far outside the mainstream. Outside of David Guetta, Avicii and Calvin Harris, most people have never heard of the biggest names in dance music despite the fact that they earn more than most movie stars. That said, brands have seen how important dance music is to Millennials, but most are still trying to figure out how to activate in this space in an authentic way that fits with the culture.



**Q: Tiësto entered into a partnership with 7Up focused on helping aspiring DJ talent. How important is it to support the next generation of artists?**

**AG:** Mentoring and supporting young talent is something that Tiësto takes very seriously. He was given a helping hand by numerous people over the course of his career and he feels indebted to them and does his part to pay it forward. He gets inspiration from working with upcoming DJs and that fuels his own creativity.

**Q: Where do you anticipate the most growth coming from in dance music over the coming years?**

**AG:** I think the most growth from a territory basis will come from Asia and South America over the next few years. Musically, I think house music will continue to gain in popularity, but I think rather than one predominant global sound (as there was for a brief period with 'EDM') there will be a variety of sounds that will all be strong. Many of the people who discovered dance music because of Swedish House Mafia in 2011 have moved on to more underground sounds, while the audience for the more commercial styles only continues to grow as more young people come into the scene.

**Q: How important is it that dance retains its subcultural roots?**

**AG:** I think the underground has only grown stronger as a result of so many people becoming fans of dance music in all its different forms. The underground will never die.

# THE LOGISTICS

# THE LOGISTICS

## THE PLANNING

### FESTIVALS/CLUBS

Though dance events are seen as a social experience, with attendees for both clubs and festivals likely to go in groups, purchasing behaviour is slightly more solitary. The majority of dance tickets on Ticketmaster UK are sold as singles or pairs – 42% of club orders were sold as pairs, and more than half (52%) of dance festival orders were single tickets.

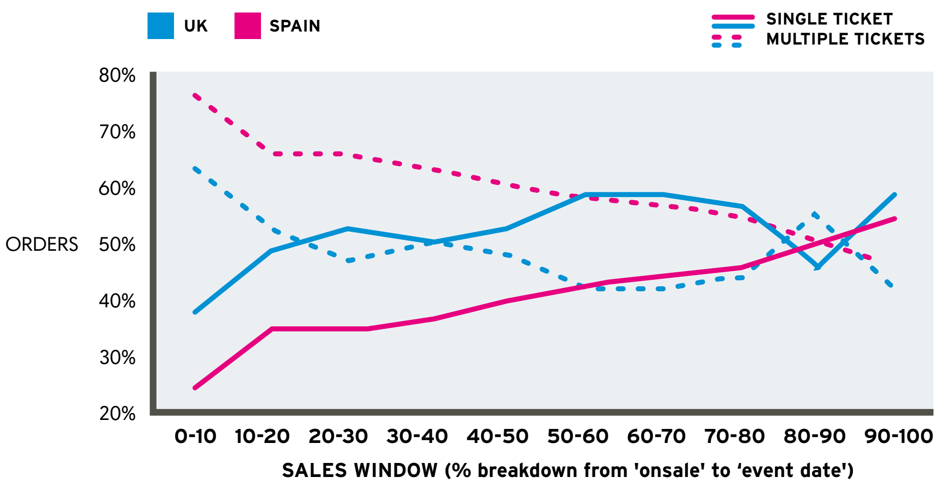
Customers usually buy more tickets in one transaction early in the sales window, and switch to buying single tickets around the time of the event. The 'switch' happens earlier for festival purchases, compared to club events. As we get closer to the day of the event, almost 60% of tickets sold are single (rather than group).

**What was the best thing that you remember about the experience?**

*'The feeling of being away from reality. When you are in this buzz, this atmosphere, it is like the world around us just stops for the night'*

Festival attendee, Female, 20–24, UK, North West

### GROUP SIZE - COMBINED








### FESTIVAL TICKETS

Most people in both countries (over two in three) plan their dance festival activity after line-ups have been announced, usually at least 2 months ahead of the event itself, and about 15% actually book before they even know the line-up (more than 6 months in advance).

However two in five leave the booking until last minute, purchasing tickets up to a week before the festival. It is important to note that these people are usually the lower spenders.

Ticketmaster's transactional data for the UK supports this trend, with less affluent groups over-represented amongst late bookers (Claimant Culture, Ex-Council Community, Terraced Melting Pot), and affluent family groups over-index among early bookers (Alpha Territory, New Homemakers, Liberal Opinions), according to Experian's Mosaic classification.

One in five UK attendees (18%) reportedly make the purchase on the actual day of the event (compared to only 9% of the Spanish festival attendees).

In terms of where they buy from, the vast majority (85% in the UK and 88% in Spain) get their tickets directly from the festival web page, with only one in ten on average buying from a ticketing website, and even fewer (2% in the UK, 1% in Spain) from a ticketing marketplace. However, 20% of UK attendees and 12% of Spanish say they purchase from people selling tickets on the day of the festival.

Although actual purchasing behaviours are less geared towards ticketing websites (both primary and marketplace websites), significantly more people would consider these channels for future purchases.

#### UK

- 12% have bought from ticketing websites, but 58% would consider buying from this channel in the future
- 64% of those who purchase through primary ticketing websites mentioned Ticketmaster
- 2% bought from a ticketing marketplace, but 29% would consider buying from this channel in the future

#### SPAIN

- 8% bought from a ticketing website, but 62% would consider buying from this channel in the future
- 33% of those who purchase through primary ticketing websites mentioned Ticketmaster
- 1% bought from a ticketing marketplace, but 11% would consider this channel in the future

The types of tickets bought vary from weekend passes, (82%), day tickets (81%) and camping (70%), and over half (58% in the UK, 53% in Spain) went for VIP tickets as well. UK attendees are equally likely to have bought them at full price or with an 'early bird' offer, however in Spain the tendency is to go for the full price.

**UK**

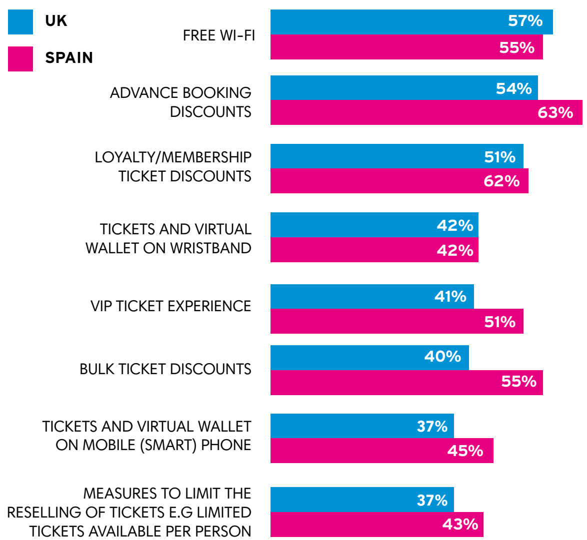
- 30–34's are most likely to purchase day tickets, out of all age groups
- 25–29 y/o are most likely to purchase weekend passes and camping tickets

**SPAIN**

- 16–19 year olds are the most likely to purchase camping tickets (likelihood to purchase decreases as age increases)
- 25–29 year olds are the most likely to purchase weekend passes

Gauging the reaction towards some value added benefits that could be introduced to enhance the experience, free Wi-Fi was the most popular in the UK (57%), and advanced booking discounts the most appealing amongst the Spanish festival goers (63%). Tickets and virtual wallets on wristbands were favoured over having these available on smartphones in the UK (42% vs. 37%), whereas the level of appeal was similar amongst Spanish festival goers (just over 40% found both options appealing).

### FESTIVALS - INTEREST IN VALUE ADDED BENEFITS




TOP

HIGHEST APPEAL:

**FREE WI-FI**
**ADVANCE BOOKING DISCOUNTS**

Especially amongst 16–19 y/o and 40–44 y/o

TOP

HIGHEST APPEAL:

**ADVANCE BOOKING DISCOUNTS**

Over 40s are the most interested in free **WI-FI** at festivals





## IBIZA CLUBBING

Ibiza goers also pre-plan their clubbing activities to some extent, with close to three in five (57%) of Spanish attendees and fewer (31%) Brits who booked nightclub tickets in advance.

In terms of interest to pre-book in the future, highest appeal is for booking day/ beach parties for UK attendees (34%) and day trips (28%) or boat parties (26%) for Spanish attendees.

### IBIZA INTEREST IN PRE-BOOKING

| | | |
|---|---|---|
| 34% | DAY/BEACH PARTY TICKETS | 22% |
| 27% | SIGHTSEEING DAY TRIPS | 28% |
| 27% | NIGHTCLUB TICKETS | 24% |
| 26% | BOAT PARTY TICKETS | 26% |
| 25% | CLUB EXTRAS | 12% |
| 16% | MERCHANDISE | 13% |

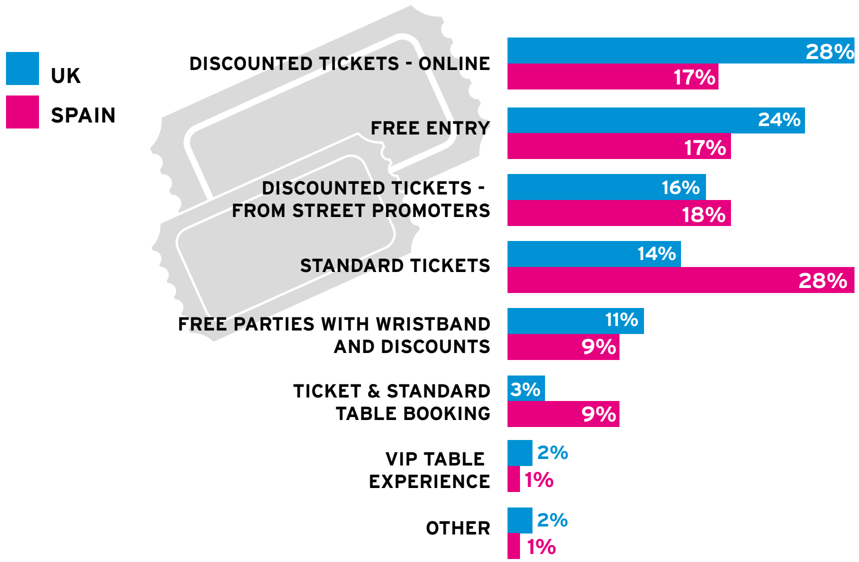
Three in five Spanish Ibiza goers have pre-booked nightclub tickets, although one in four feel likely to do so in the future

In the UK, likelihood to book in advance and actual pre-booking behaviour are aligned. 31% have pre-booked nightclub tickets, and 27% feel likely to they do so in the future

Close to half in the UK usually buy some sort of discounted ticket, although this is primarily online (28%) rather than from street promoters (16%); a third (35%) go for the free options (either free parties with wristbands or discounts, or whatever else they can get for free), 14% opt for standard tickets and a small minority (5%) book a table (either through a table + ticket booking, or a VIP ticket which includes a table booking as well).

In Spain however, close to a third (28%) usually buy standard tickets, slightly more (35%) are going for discounted tickets (equally likely to source them online or from street promoters), one in four (26%) go for free parties and one in ten (10%) also have a table included in their booking.

### WHAT KIND OF TICKETS DO THEY PURCHASE?




**TOP**

Majority of UK Ibiza attendees have purchased **DISCOUNTED TICKETS ONLINE**, and close to one in four go for **'FREE ENTRY'** offers

**TOP**

Majority of Spanish Ibiza attendees have purchased **STANDARD TICKETS**

16-19 year olds are the most likely to have purchased **DISCOUNTED TICKETS (ONLINE OR FROM STREET PROMOTERS)**





## THE SPEND

*ON TICKETS*

### FESTIVALS

More than half of festival attendees in the UK are reportedly spending £50+ on tickets, with just over one in ten (15%) who are going over £150.

Transactional data shows that the majority (60%) of dance festival tickets sold on Ticketmaster were in the £51-£100 price bracket, and 20% in the £151-£200 bracket.

In Spain however, the majority (38%) spend between €21–€50, closely followed by those paying between €51–€100. Only a very small minority (3%) pay above €150.

**In both markets, willingness to pay is aligned with actual spend.**

### CLUB/VENUE GIGS

**Most gig attendees in the UK (75%) usually spend up to £30 on tickets,** which is very much in line with Ticketmaster transactional data showing that 50% of tickets sold were priced up to £20 and a further 32% between £20 and £30.

Similarly, Spanish attendees usually pay up to €30 on tickets, with a minority of 13% going for the €50+ spend.

**Willingness to pay more is related to notoriety of the DJ**, with 49% in the UK and a similar proportion in Spain who are willing to pay between 20 and 50 (£ or €) for a celebrity DJ, and more than half not willing to pay any more than £20/€20 for a less known DJ.

### IBIZA NIGHTCLUB TICKETS

About one in five of UK Ibiza goers usually pay up to £30 on club tickets, whilst more Spanish attendees (33%) go for a similar price range (up to €30).

However over one in ten (16%) Spanish attendees and slightly fewer (9%) UK attendees usually go for free entry clubs.

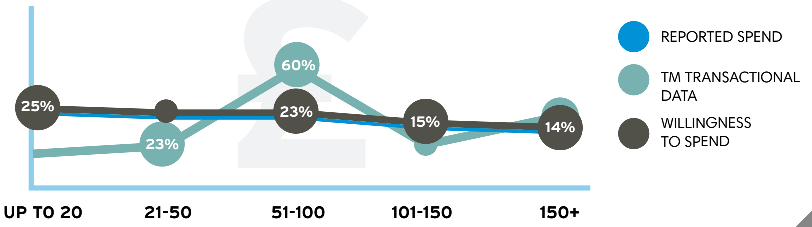
**Willingness to spend peaks in the 31–50 (£ or €) price range** across both markets, with close to one in four (23%) willing to spend this much in the UK and 27% amongst Spanish attendees.

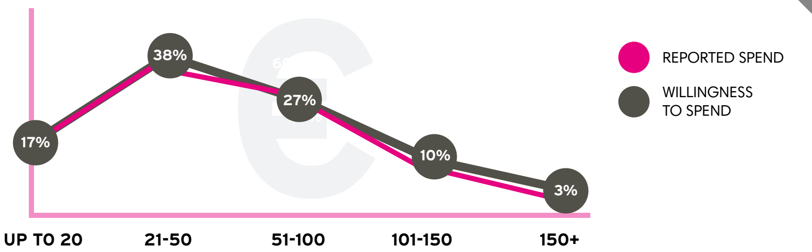
**What was the best thing that you remember about the experience?**

*'Crowds of friendly people'*

Ibiza goer, Male, 40-44, Northern Ireland

# DANCE FESTIVALS

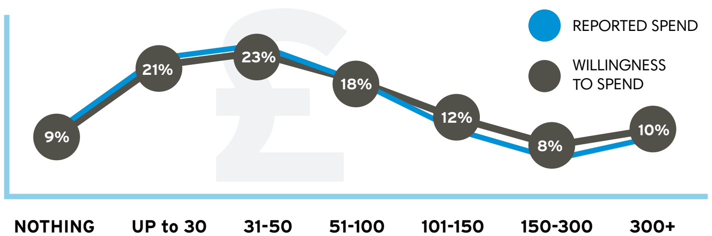


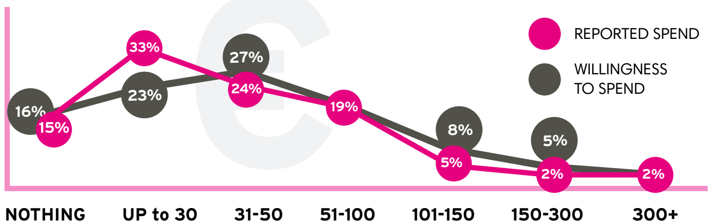




**'Heavy attendees' (i. e those who attended 5+ events in the last year) are willing to spend more on tickets than light/ moderate attendees**

# IBIZA CLUBBING

**'Heavy attendees' (i. e those who attended more than 5 times in the last year) are willing to spend more on tickets than light/ moderate attendees**

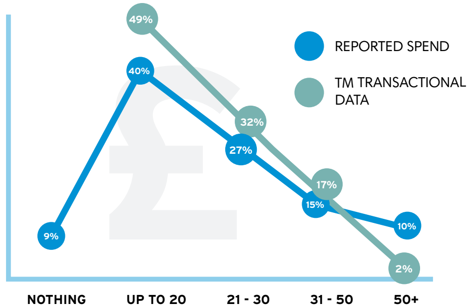


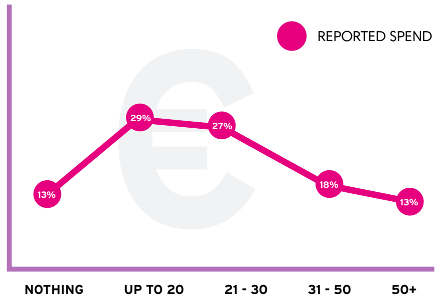








# DANCE GIGS IN CLUBS / OTHER VENUES




## ANCILLARY SPEND

The spend of attending a dance event is very often higher than only the cost of the ticket.

In the UK, festival goers tend to spend similar amounts on travel, food and drinks – with the majority (about a third) paying between £21-£50 on either, and 38% spending more than £50 on drinks. Also, 35% spend quite low (up to £20) to travel to the festival, and even more people (64%) spend a similar amount to travel to a gig in a club/ other venue.

A third of festival attendees do not pay anything on accommodation, but from those who do, more than half are spending over £50.

Ticketmaster's transactional data for the UK also suggests that going to a dance event at a club is a much more local experience than other events (or dance festivals), with close to half (45%) of purchasers for club events, living within 10 miles of the destination venue (vs. 31% for the average TM customer and 26% for festival customers).

**What was the best thing that you remember about the experience?**

*'I absolutely love how I can just let steam off and there are absolutely no restrictions. I feel free'*

Festival attendee, Female, 16–19, UK, London

Spending patterns on food and drinks at festivals are similar amongst Spanish attendees, with the average spend being in the €21-€50 bracket. Spend on travel, however, is slightly higher, with 48% paying over €50, and a quarter of attendees between €21–€50. As in the UK, those going to club/ venue attendees are less likely to travel, with a quarter (25%) not spending anything, and the majority (36%) paying up to €20 to get to their chosen gig.

Highest costs of a getaway to Ibiza are flights and accommodation, with 46% of Brits paying between £100–£300 on flights and 38% paying a similar amount for accommodation; however close to one in five spend over £300. Not surprisingly, Spanish Ibiza goers spend less on both flights and accommodations, but quite similar to the UK on day and boat parties.

**What was the best thing that you remember about the experience?**

*‘My first time in the early 90’s when clubbing was more under-ground and not mainstream. My first sunset at Cafe Mambo’*

Ibiza goer, Male, 45–54, UK, South East

**DAY AND BOAT PARTY SPEND**

UK

SPAIN

24% SPEND OVER £100

23% SPEND OVER €100

19% SPEND £51-£100

22% SPEND €51-£100





# DANCE FESTIVALS – OTHER SPEND

**TRAVEL** (£ AND €)

34% SPEND 21-50 25%

14% SPEND 100+ 25%

**CLOTHES** (£ AND €)

16% SPEND 51-100 11%

UK festival goers aged between 20 and 29 are the biggest spenders on **CLOTHES**, with one in seven spending **OVER £100**

**ACCOMMODATION** (£ AND €)

19% SPEND 100+ 18%

29% SPEND NOTHING 24%

**FOOD** (£ AND €)

34% SPEND 21-50 34%

**DRINKS** (£ AND €)

31% SPEND 21-50 36%

38% SPEND 50+ 32%

# DANCE EVENTS IN CLUBS / OTHER VENUES – OTHER SPEND

**TRAVEL** (£ AND €)

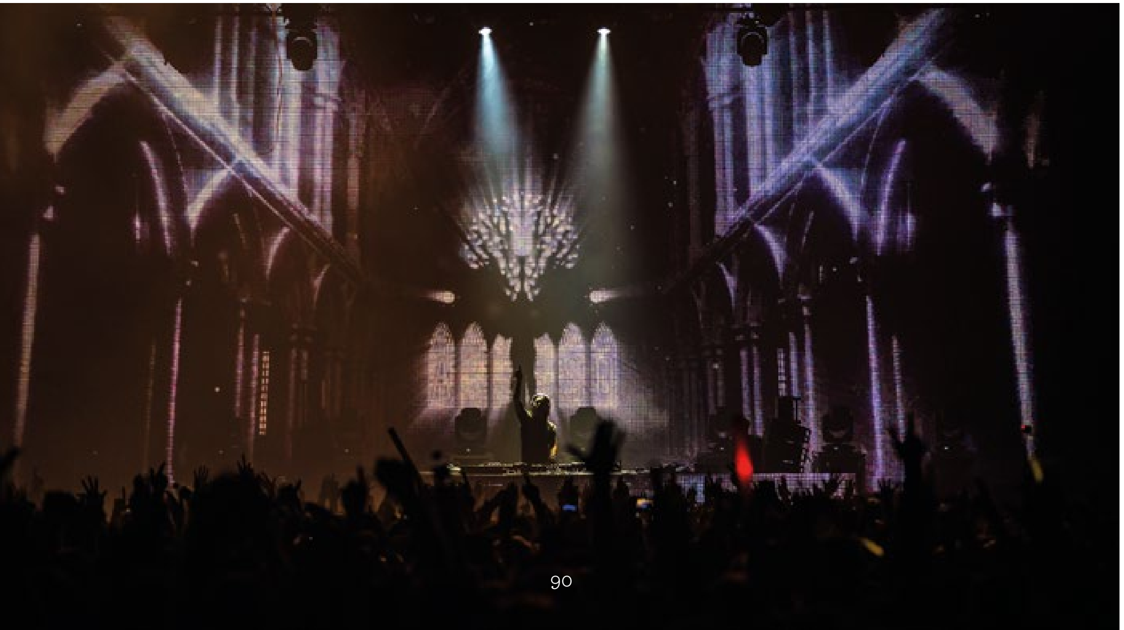
| | | |
|---|---|---|
| 51% | SPEND UP TO 20 | 36% |
| 6% | SPEND 50+ | 11% |

**CLOTHES** (£ AND €)

| | | |
|---|---|---|
| 11% | SPEND 31-50 | 8% |

**DRINKS** (£ AND €)

| | | |
|---|---|---|
| 10% | SPEND 50+ | 11% |
| 27% | SPEND 21-30 | 24% |





# IBIZA CLUBBING – OTHER SPEND

**DAY & BOAT PARTIES** (£ AND €)

| | | |
|---|---|---|
| 26% | SPEND 31-50 | 16% |
| 7% | SPEND 300+ | 5% |

**FLIGHTS** (£ AND €)

| | | |
|---|---|---|
| 46% | SPEND 100-300 | 36% |
| 16% | SPEND 300+ | 10% |

**ACCOMMODATION** (£ AND €)

| | | |
|---|---|---|
| 22% | SPEND 300+ | 16% |
| 38% | SPEND 100-300 | 31% |

# *INTERVIEW:* TIGERLILY

## THE RISING AUSTRALIAN DJ TALKS PASSIONATE FANS, GIANT UNICORNS, AND WHY LIVE IS MORE THAN JUST MUSIC

*Tigerlily is one of Australia's hottest new DJ exports. Hand picked as support for Tiësto's tour of Asia, she is now showcasing her own unique stage presence at Pacha Sydney*

TIGERLILY
DJ/ARTIST

**Q: Was there a particular live event that inspired you to take up the DJ lifestyle?**

**Tigerlily:** Yes! It was Creamfields 2010 in Sydney Australia. I remember watching deadmau5 play a closing set on the main stage and it absolutely blew me away. That was a turning point in my life that really confirmed for me that I wanted to be involved in dance music.

**Q: You've had a fairly hectic touring schedule of late. Have you noticed any major differences between fans and audiences in different countries?**

**Tigerlily:** The audiences in each city are always different and I absolutely love that. When you go to a city for the first time you never know what you're going to get. The crowds in Italy were absolutely outrageous and moshing like crazy, American crowds are really open minded to new music and sounds, Aussies love to party HARD, and Malaysian crowds are known for singing all the words even though English may not be their first language. It's pretty amazing seeing how dance music can transcend cultural boundaries.

**Q: Your 'Kiss My Tigerlily' show in conjunction with Pacha was in the works for a year, how important is it that fans get more than just music from a live DJ performance?**

**Tigerlily:** I think at this point in time, especially in regards to dance music, fans are looking for an experience which is more than just music. Every festival around the world has very quickly recognised this and puts ample time and money into organising props, visuals, lighting, dancers and effects. This is the same for my Kiss My Tigerlily show at Pacha Sydney! I wanted the fans to get a complete Tigerlily experience and I feel that we have been able to create a colourful and magical experience that is like nothing else at any club in Australia.

**Q: What is it about dance music culture that is so attractive to fans?**

**Tigerlily:** I think that dance music culture is really infectious and it has the ability to bring people together despite age, ethnicity, gender, location, and time. Dance music has traditionally been based around peace, love, unity and respect and I still think that to this day these qualities are emulated through both dance music and at many dance parties all over the world.

**Q: If you could play a show anywhere in the world, where would it be and why?**

**Tigerlily:** EDC in Las Vegas and Ultra in Miami. These two festivals are absolute monsters and playing on the main stage would be mindblowing. I'd love to put my own spin on it similarly to the way I do at Pacha. Dancers dressed up as mermaids, three metre high unicorns on the stage, rainbow lighting, bubbles, confetti…

# CODE OF CONDUCT

# CODE OF CONDUCT

As noted earlier (see the Motivations and Preferences chapter), the atmosphere is a strong driver for attending dance events of any type.

Although it only applies for a minority, 'getting in an altered state' is also part of that and is a pull for about one in ten people.

Having said that, the majority of UK attendees consume between 2 – 5 drinks at a dance event, with the under 24 year olds being the heaviest drinkers. However, 40% of UK attendees and fewer (18%) of Spanish have more than 5 drinks.

Just over a third (34%) of UK attendees and fewer, about one in five (22%) of Spanish, take drugs at dance events – more likely to be occasional rather than frequent use. A very small minority (about 5% in both markets) see drugs as an integral part of the experience. However, the research also shows that overall drug habits do not differ at dance events compared to general drug uptake outside the events.

And although people are generally aware of drug presence at dance events and have a certain amount of tolerance/ acceptance to it, the majority (about 40% in the UK and 50% in Spain) find drug taking off-putting.

People feel generally positive about measures taken for their safety, although gig/ club attendees are slightly less likely to be positive than festival and Ibiza goers. About 40% in both markets, and across all types of dance event attendees, feel strongly that organisers / club owners are putting effort into making them feel safe overall.

- 49% of Ibiza goers from the UK and slightly fewer (39%) of Spanish attendees have rarely seen violence or crime not dealt with
- 48% of UK festival goers and 44% of dance gig attendees believe there is plenty of security staff on-site
- About one in three Spanish attendees, and more UK attendees (especially festival goers) report that on-site drug checking is common at dance events





**What was the best thing that you remember about the experience?**

*'Friendly, relaxed nature of people and great club experiences'*

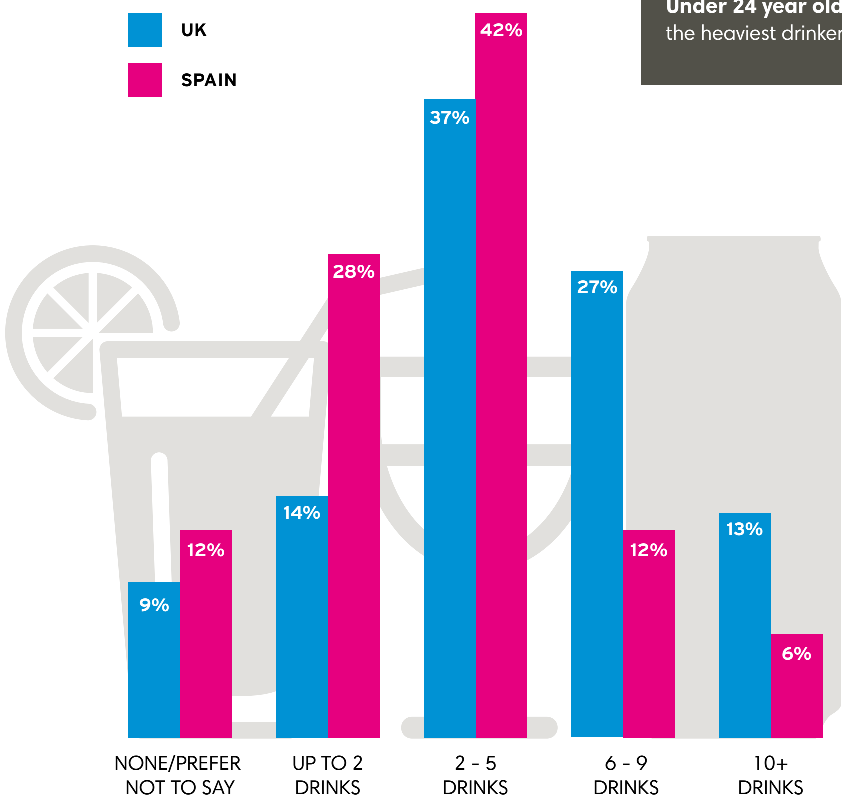
Ibiza goer, Male, 25–29, London

**ALCOHOL CONSUMPTION**

**ALCOHOLIC DRINKS CONSUMED ON A NIGHT OUT AT A DANCE EVENT**

**Males** are heavier drinkers than females

**Under 24 year olds** are the heaviest drinkers



# BRANDS & SPONSORSHIP

# BRANDS & SPONSORSHIP

Dance event attendees in both markets (57% in UK, 63% in Spain) acknowledge the fact that sponsors have a key role in making dance events financially possible, with even more people (68% in UK, 66% in Spain) feeling happy for events to be sponsored if this keeps ticket prices down.

More than half also believe sponsors should provide a service adding value to the overall experience, with priorities being:

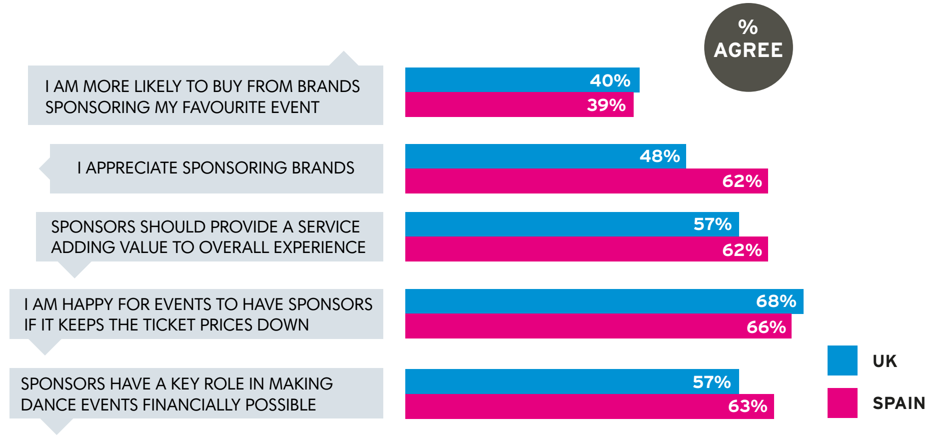
- Giveaways/ freebies (42%), followed by technology to make the event run smoothly (39%) and exclusive live music content (36%) – in the UK
- Giveaways/ freebies (40%), followed by extra stages/ venues (36%) and event-related technology (35%) – in Spain

Attendees in the UK feel that alcohol brands are most suitable to sponsor dance events (46%), whilst in Spain electronic hardware brands (41%) are seen as best fit.



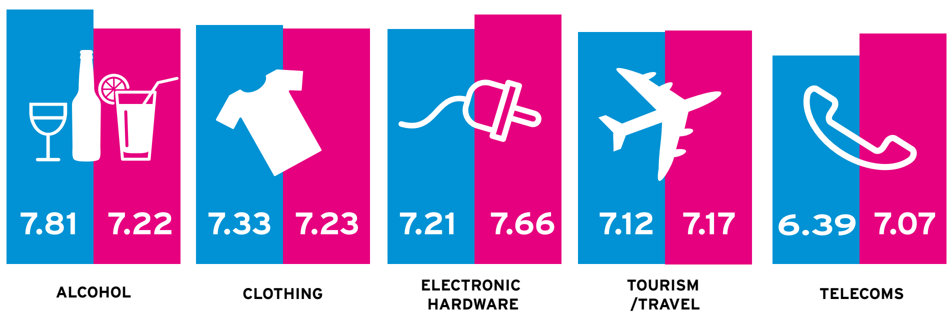



## GENERAL ATTITUDES



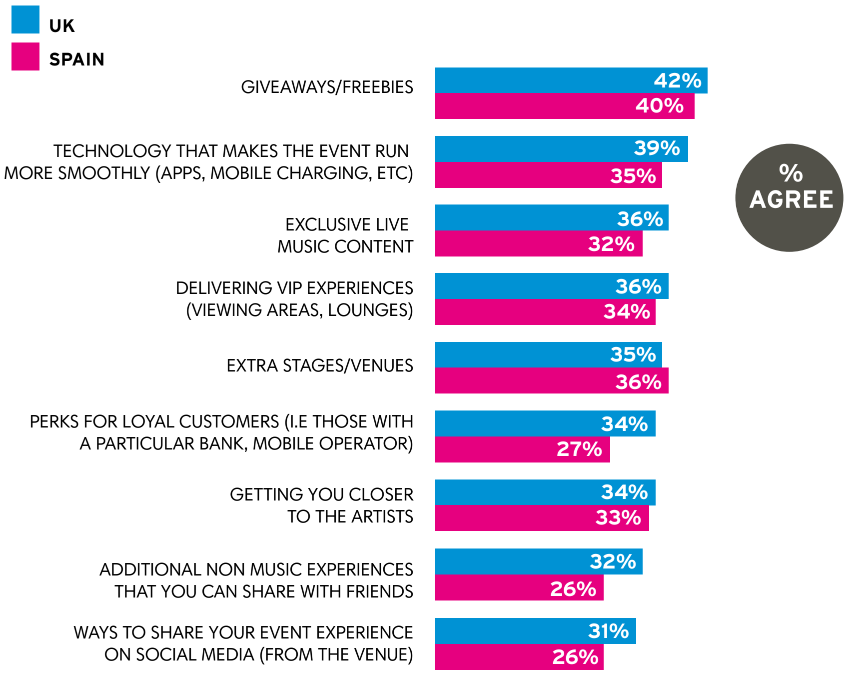

## WHICH FITS BEST? - TOP 5 INDUSTRY SECTORS CONSIDERED STRONGEST FIT TO SPONSOR DANCE EVENTS

**BASED ON AN AVERAGE SUITABILITY SCORE (OUT OF 10) - AS VOTED BY DANCE ATTENDEES**




**30-35 year olds are most likely to feel Alcohol is a suitable sponsor. UK males more likely to favour automotive sponsors**

## ENHANCING THE EXPERIENCE




**What was the best thing that you remember about the experience?**

*'Meeting new friends and everyone having a blast'*

Ibiza goer, Female, 20–24, Scotland



# *INTERVIEW:* NERVO

THE DJ DUO DISCUSS THEIR CLUBLAND ROOTS AND THE EVOLVING ROLE OF BRANDS IN DANCE

*Sisters Mim and Liv (Nervo) when not penning chart hits, or commanding a unique presence at live events across the globe, are also ambassadors for some of the world's most recognised brands*

**NERVO**
DJ/ARTIST

**Q: What inspired you to move from song writing behind-the-scenes into the dance music spotlight?**

**NERVO:** We just loved house music and went to Ibiza to party as fans. Then when we were living in London we went to The Cross and partied there on weekends. When we started working with DJs we got inspired by their sounds and that really helped when we started to produce ourselves. Luckily after 'When Love Takes Over' for David Guetta went number one it looked like dance music was going to cross over more to the pop world. At that stage we were already DJing ourselves and started releasing records as NERVO and haven't looked back since.

**Q: With dance music festivals cropping up each year, is there still room for growth in the localised club scene?**

**NERVO:** We hope so! We love playing clubs. We started our careers playing in clubs. There is an intimacy playing in clubs that is hard to achieve at a festival. It's a great place for an upcoming DJ to practice his or her skills.

**Q: Brands are increasingly playing a pivotal role in dance music culture. What is the key attraction in this genre?**

**NERVO:** Brands are drawn to dance music because it has become very popular, so they have a greater potential to reach more people – especially the younger fans.



Since we perform in front of thousands of people each week, we are also in a great spot to see what trends are popping up all over the world. Any brand aligning with dance artists or festivals should share the same ethos, the same spirit and be true to dance music culture – which is to let go, enjoy, be who you are, embrace the music and the good vibes around the music.

**Q: You've partnered with CoverGirl, TAG Heuer, Ballentine's and Franklin & Marshall. How important is it that DJs leverage their own personal brand?**

**NERVO:** Every brand we collaborate with is an extension of what we do and where we are today. Each brand has helped us to reach more people with our music, so for us it's a win/win. The fashion collaborations in particular have been a lot of fun as they have helped us explore further into our own personal fashion tastes.

**Q: What are the three key ingredients that make the perfect dance music experience?**

**NERVO:** A track you love playing on a great sound system, your friends close by sharing the experience and no work the following day so you can enjoy for as long as you like!

**Q: How do you see the genre evolving?**

**NERVO:** Dance music will be forever growing, forever evolving. It's an open playing field with so many different genres and the tools to make music more and more accessible. We think it's a great time for music!

# BRAND SPONSORSHIP CASE STUDIES

*Dance music now commands the attention of a host of big name brands, each actively seeking to engage with passionate audiences the world over. Here we outline some of the recent stand out collaborations.*

## RAY-BAN X BOILER ROOM

Now well into its third year, the partnership between the iconic eyewear company and Boiler Room, the leading streaming platform for underground live music, is a truly global accomplishment. With intimate gigs spanning 10 cities, from LA to Milan, under its belt and over 3 million live broadcast streams, the platform has evolved dramatically since its initial inception. Bringing Ray-Ban's 'Never Hide' mantra to the fore, the campaign, which started life as a series of intimate RSVP-only live shows has developed into a fully fledged event and editorial platform, expertly curated by the world's most visionary artists. The integrated platform harnesses the desire amongst the dance community for not just credible live experiences, but also rich, multi-format content, from exclusive mixes to mini-documentaries and white label video, elevating the concept of a club event whilst simultaneously breaking down the barriers between artist and fan.







## SAMSUNG/VODAFONE CREAMFIELDS

Vodafone and Samsung partnered up with the UK's most sought after dance festival of the summer in order to promote the new line of Samsung Galaxy S6 and S6 Edge handsets. Fans that located the Samsung Galaxy S6 double decker bus on-site could recharge their depleted devices, embrace the music during a silent disco, relax in a chill out area and take the now ubiquitous festival selfie courtesy of a quirky trampoline photo booth. To top it all off, the two brands teamed up with dance industry stalwart Fatboy Slim's Smile High Club and 2,000 devoted dance music fans in a momentous and spontaneous photo opportunity, creating the UK's largest human smiley face.

## **RED BULL** REVOLUTIONS IN SOUND


Red Bull has been at the forefront of underground dance culture for over 17 years, kick starting its much-revered Red Bull Music Academy program way back in 1998, with a singular vision to unearth and mentor new creative music talent.

Since its inception the brand has consistently delivered some of the most authentic live music experiences, carving out a credible and respected, niche at the epicentre of dance culture. Stand out RMBA collaborations include Revolutions in Sound, bringing together 30 of the most legendary UK club nights of past and present for one landmark event, effectively turning the iconic London Eye into a revolving nightclub.

More recently, Red Bull staged 'R1ng 2 Rav3' tapping into the 90s underground rave renaissance, whereby guests were drip fed info about the event and talent line up via RBMA radio and a dedicated phone line over the course of the week, culminating in a major live music experience.





## **BUD LIGHT** HOUSE OF WHATEVER/ FESTIVAL CANS

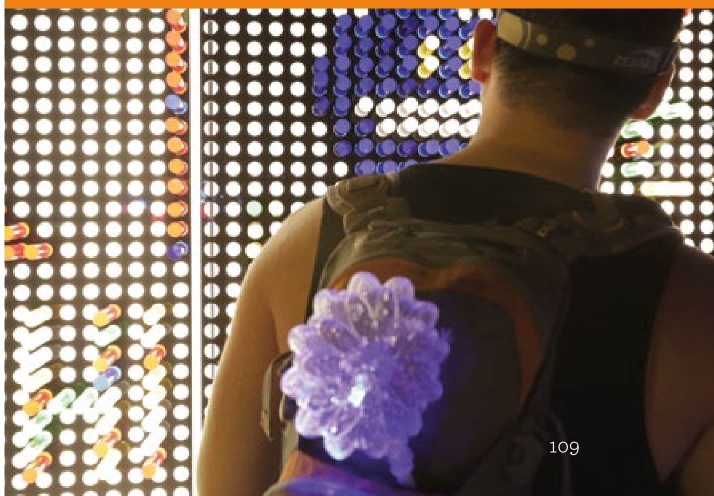
The beer brand had a dedicated footprint on site at the EDM behemoth that is Electric Daisy Carnival in 2015, with a view to tapping into the passionate Millennial audiences that flock to an event that has become a dance music rite of passage.

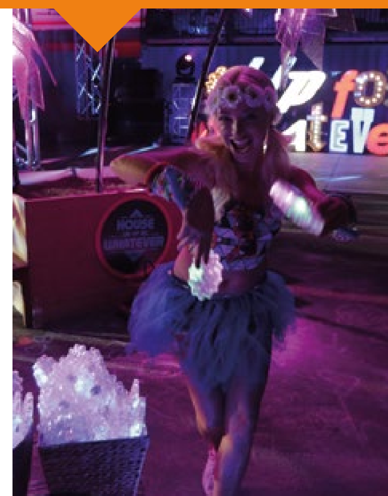
The 'Bud Light House of Whatever' activation, part of a wider marketing initiative to serve up spontaneous moments for fans, featured larger-than-life visuals and a mix of interactive activities. On site immersive experiences included a life-sized 'lite brite' digital graffiti wall, where guests could express their own creativity, and the ability to receive glow-in-the-dark tattoos and LED flower wand giveaways.

The brand also engaged in an innovative partnership with Diplo's Mad Decent Block Party, celebrating the music, culture and artistry of the event with 200,000 uniquely designed and customisable Bud Light Festival Cans. The limited edition artist-designed cans were made available exclusively in each of the touring festival's key markets.

*'Year after year, the season's hottest artists attract festival goers to the biggest venues and concerts across the country, and we are always looking for ways to elevate our fans' experiences at their favorite events. The four Mad Decent custom labels and 27 artist-designed labels were inspired by the spontaneous and unexpected experiences that music lovers enjoy all summer long. These bright, graphic Bud Light Festival Cans are like nothing you've ever seen from Bud Light – or any brand in the U.S. – and no two cans are alike'*

**Alexander Lambrecht, Vice President, Bud Light**





## **SMIRNOFF** SMIRNOFF HOUSE


*'Smirnoff is a brand that is open to everybody and has been supporting dance events for years. A partnership with Live Nation was a brilliant fit allowing us to provide amazing tasting drinks and bring DJs closer to the crowds at festivals across Europe'*

**Jamie Young, Brand Manager, Smirnoff**

The vodka brand's all-American house party concept touched down at two of Europe's most revered dance events over the summer, Sonne Mond Sterne in Germany and Creamfields in the UK, as part of a major festival partnership in conjunction with Live Nation. Designed to bring artists and fans into greater proximity, the Smirnoff House was held in a familiar lounge, bedroom and kitchen style setting, complete with kitsch décor, offering up the ultimate house party experience.

The Mixmag LAB, a collaboration with the essential dance music publication, acted as the focal point of the House, where a host of big name DJs, including Steve Aoki, Ben Pearce and Kolsch, played intimate and inclusive sets to a packed crowd of passionate fans. Furthering the inclusive feel of Smirnoff's on site activation, those not present at the festival could also tune in via a Mixmag live stream, putting them at the beating heart of the action.

# CONCLUSION

# CONCLUSION

*In a nutshell, the research shows that dance music events, in all shapes and sizes, appeal to a wide and diverse audience that transcends cultural boundaries.*

We also see that what brings people together is not only the music itself, but the euphoria, escapism and freedom most associated to experiencing it live. Whether this happens in a local club or in Ibiza, or at a multi-day festival, there is a strong cross-over between event types and venues.

Consumers worldwide are acknowledging that dance music is becoming increasingly popular and widely accessible, though its increased commercialization is far from making it less appealing.

Dance is seen to be influencing popular culture – something which is viewed quite positively by attendees themselves; they also recognize that quality of dance gigs is improving, both from a line-up and a production perspective. This is also reflected in Ticketmaster's transactional data, showing that previous attendees of more 'mainstream' UK festivals (like Wireless or V Festival) are gradually 'shifting' towards purchasing tickets for dance festivals (there has been a 29% increase in the number of these customers between 2012 and 2014).

On the other hand, the industry is also acknowledging that, over the years, *'the audience has driven the business', (1)* and is responding to this. Event promoters, venue owners, ticketing providers, corporate sponsors and DJs/ producers, are all coming together to meet the demands of this tech-savvy, diverse audience.



## THE EXPERIENCE

*'Although a lot has changed since 20 years ago, the core values in electronic music are still pretty much the same […] In 2015, the product is so much better.'(2)*

Even if the draw of celebrity DJs is undeniable and widely recognized by both fans and the industry, the actual productions in this *'age of experience' (3)* are now just as important.

*'The combination of the music and the production are two massively important ingredients that create the experience.' (4)*

Dance festivals offer impressive visual effects, but clubs and venues are equally focusing on engaging their audiences with LED screen walls, laser shows and other elements carefully crafted to *'enhance the production.' (5)*

## 'UNDERGROUND WILL NEVER DIE' (6)

Furthermore, with dance music *'continuously re-inventing itself' (7)* and new sounds emerging, club nights are also evolving to cater for the diverse music tastes.

*'There are venues that have found their niche in the market with underground nights' (8)*

*'Many of the people who discovered dance music because of Swedish House Mafia in 2011 have moved on to more underground sounds, while the audience for the more commercial styles only continues to grow as more young people come into the scene.' (9)*

## EMERGING TALENT AND A 'VARIETY OF SOUNDS'

Something else that defines the dance music culture is *'a generation of technology' (10)* – non-professionals are inspired by events they attend and now have access to tools, which allow them not only to produce dance music, but to promote themselves and share content. Indeed, the research shows that one in ten attendees of UK dance events also produce electronic music. Even more of them are contributing to dance blogs, and for the vast majority, social media is essential not only to share their experiences at live events, but also to share content and find out about events they might be interested in.

Established DJs themselves are recognising the potential of mentoring and supporting emerging talent, whilst rising DJs like Australian Tigerlily recall how a festival experience inspired them to embrace a career in dance music:

*'It was Creamfields 2010 in Sydney Australia. I remember watching deadmau5 play a closing set on the main stage and it absolutely blew me away. That was a turning point in my life that really confirmed for me that I wanted to be involved in dance music.' (11)*

## SPONSORSHIP

But these impressive productions also require an equally impressive financial commitment, and attendees themselves are aware of this as well (more than half agree that 'sponsors have a key role in making dance events financially possible). To this end, favourability of sponsorship actually increases if this helps keep tickets prices down.

With its ability to gather so many people and such diverse audiences, corporate brands are also keen to be associated with dance.

*'I see brands playing a big part in the evolution of the business. Dance music and its mass market appeal is a huge draw for brands wanting to get in front of this diverse, tech savvy, global audience.' (12)*

On the other hand, sponsors and consumers alike have understood that whilst a financial contribution is necessary, it takes more than that to engage such audiences.

Engaging activations are therefore very important, leading to creative and inspiring use of sponsorship and adding further value by creating unique connections between dance music and its fans (Ray-Ban x Boiler Room, Smirnoff), enhancing festival experiences and content sharing (Samsung/ Vodafone, Bud Light) or mentoring emerging talent (Red Bull Music Academy).

## WHO WINS IN THIS BUSINESS?

So, just as dance music itself is constantly re-inventing itself, the industry that is responsible for promoting the genre also needs to keep up in order to meet the increasing demands of an even more increasing audience. This is what brings together DJs and their agents, event promoters, venue owners, ticketing providers and corporate sponsors: a shared goal to enable the creation and sharing of unforgettable experiences, which will continue to drive the industry to the next level.

QUOTE REFERENCES

1. James Barton
2. James Barton
3. James Barton
4. James Sutcliffe
5. James Sutcliffe
6. Andrew Goldstone
7. James Barton
8. Enrique Fernandez Pigem
9. Andrew Goldstone
10. James Barton
11. Tigerlily
12. James Sutcliffe

# METHODOLOGY

# METHODOLOGY

## 1. RESEARCH

A couple of sources were used interchangeably to provide a holistic picture of consumers, as well as the wider trends within the dance events industry.

### PRIMARY RESEARCH

**Stage 1 – Nationally representative sampling (used to identify the demographic profile of dance attendees)**

Ticketmaster partnered with Research Now to get a representative sample of the UK and Spanish populations (1000 respondents in each market), through an online survey (designed, set-up and analysed in-house), which was fielded between July 21st and August 8th 2015 in the UK and August 10th and September 7th in Spain.

This initial stage of the research allowed us to identify the proportion of the general population who attended dance events in the last three years (16% in the UK and 33% in Spain), as well as the demographic profile of dance attendees.

**Stage 2 – The 'boost' stage**

Based on the demographics profile of dance attendees (as identified in the nationally representative sampling), we targeted additional respondents accordingly, until we reached a robust enough sample of about 1,000 people (in each market) who went to dance events in the last three years.

Following a thorough cleansing and weighting* process, a total of 4934 responses in the UK and 2932 in Spain qualified as complete responses. Out of these, 1017 in the UK and 998 in Spain passed our screener (having attended at least one dance event in the past three years) and were defined as dance event attendees therefore informing the majority of the report.

*Nationally representative quotas were set on age, gender and regional breakdown. Weighting was required on respondents' age for the data in Spain, to ensure that the demographic characteristics of dance attendees overall matched the profile identified in the representative sample.







### TRANSACTIONAL DATA

Transactional data based on Ticketmaster's Live Insight data warehouse, which incorporates events from Ticketmaster and TicketWeb.

- Festival data is from the top 4 selling dance festivals and top 6 selling mainstream festivals since 2013
- Dance event data is from 2,110 dance events taking place between 2013 and 2015

## 2. OTHER INSIGHTS

We also partnered with FRUKT, thought leadership specialists in the music and entertainment industry, to provide us with a wider context of the industry as a whole.

Interviews with industry experts (event promoters, dance venue owners, DJs and agents etc.) allowed us to get this deeper understanding of the dance industry trends.

TOP

**TOP 4 SELLING DANCE FESTIVALS**

CREAMFIELDS
ELECTRIC DAISY CARNIVAL
PARKLIFE
SOUTH WEST FOUR

**TOP 6 SELLING MAINSTREAM FESTIVALS**

WIRELESS FESTIVAL
V FESTIVAL
LOVEBOX FESTIVAL
T IN THE PARK
READING FESTIVAL
LEEDS FESTIVAL

# ABOUT US

## ABOUT LIVEANALYTICS

LiveAnalytics, a division of Ticketmaster International, is a provider of consumer insight and business intelligence on events, entertainment and ticketing.

We deliver sophisticated data products and services that help to improve customer retention, maximise ticket sales, increase upsells.

These range from dedicated research resource to access to our International customer database, Live Insight (with more than 60 million individual customer records across 12 markets), with which we produce unique customer insight.

In the UK, LiveAnalytics leverages data from Ticketmaster's massive database of 14m plus fans. Overlaid with in-house and licensed demographic data, LiveAnalytics offers information on fan preferences, and ticketing trends to give artists, venues and teams unrivalled insight into how, where and to whom they can sell tickets – and, afterwards, measure the effectiveness of marketing campaigns while events are still on sale, to optimize results and ROI.

State of Play: Dance Music events is the fourth in a series of reports published under the LiveAnalytics banner by the Insight team at Ticketmaster International, as part of our drive to better understand the live entertainment sector and its audiences. The first 'State of play' report was published in 2012 on festivals, followed by theatre in 2013 and Comedy in 2014.

**For more information about our services, please contact: sales@ticketmaster.co.uk**







## ABOUT ticketmaster®

We've been ticketing for thousands of clubs and festivals across the world since 1975, so you could say we're experts in the field and in packing out dance floors. We have more audience data, distribution channels and marketing reach than anyone else. With access to over 2 million dance music fans, wherever your event is happening, we make the world small enough to find the fans who'll be dancing until dawn.

We are the world leaders in ticketing, and the number one destination for tickets selling on behalf of hundreds of events across www.ticketmaster.co.uk and www.TicketWeb.co.uk in the UK and www.ticketmaster.es in Spain.

Truly international – dedicatedly local. Ticketmaster International operates in 21 different countries with local eCommerce sites, servicing over 230+ million customers per year. We have 30 international offices with 1,500 local experts that engage with one million fans across social media platforms every day, and those who wish to pop in, we serve them through 4000+ outlets. Our 400+ customer service professionals in 12+ call centres have already spoken to 1.6 million fans this year.

We are constantly investing in technology innovation and are committed to delivering world-class products and services across the entertainment-ticketing sector. We provide a safe, secure and stable environment for fans to purchase tickets.

**For more information please contact:**

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## ABOUT LIVE NATION ENTERTAINMENT

Live Nation Entertainment (NYSE: LYV) is the world's leading live entertainment company comprised of global market leaders: Ticketmaster, Live Nation Concerts, Live Nation Media & Sponsorship and Artist Nation Management.

**For additional information, visit www.livenationentertainment.com**

# ABOUT FRUKT

FRUKT is a global marketing agency with offices in London, LA, New York, Rio, Milan and Sydney. Our role is simple. We help brands entertain people and make them happy.

We've worked alongside some of the world's boldest brands – including Coca-Cola, MasterCard, Sprint, O2, McDonald's, Bank of America, Jagermeister and Budweiser – to leverage the universal passion that surrounds entertainment, creating award winning platforms, campaigns and experiences across 150 countries.

Entertainment has the power to heighten emotions, bring people together, and convey stories that resonate across the globe. FRUKT believes that every brand has the ability to harness a distinctive and valuable role within entertainment. We help define that role, developing integrated marketing solutions with credibility, longevity and commercial return at their heart.

From smart brand strategy and innovative creative thinking to considered talent procurement and rock solid activation delivery, FRUKT can help your brand become the catalyst for unforgettable entertainment moments, spreading a little more happiness along the way.

**For more information please contact:**

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GREEN