Music offers a multitude of opportunities for brands to engage with fans but selecting the right property, ensuring the right fit, and the right activation strategy is not a quick decision. It is a complex marketplace, full of moving parts. Opportunities for sponsors can range from a major global three-day festival, at the top level, down to a small gig in a local pub, club or arena. And that’s before you consider the many genres of music, each with its own values, culture and fan groups.

Repucom’s first global live music sponsorship report has been designed to examine the current landscape, from festivals to venues, tours to artist endorsements; this report concentrates on the young (14–34 year olds) music audience in the five major global music markets: the USA, UK, France, Germany and Japan.

Like all entertainment, the music industry is being impacted by new technologies – in fact music bore the brunt in terms of its traditional commercial model well over a decade ago but has adapted and streaming services in particular are creating new opportunities, while new media platforms and distribution methods are providing additional scope for brands to align themselves and interact with the world’s top artists. Promoters and sponsors of live music events, meanwhile, are able to amplify their message well beyond those fans who are on-site at a festival or major show. Technology is drawing promoters, brands, artists and fans closer together than ever before.

MUSIC IS ALL AROUND US

We listen to it, stream it, buy it, download it, share it, play it, consume it live and react to it in all sorts of different ways. It stirs emotions and straddles territories; young or old, and across a multitude of genres, music provides a passion point for millions of people all over the world – and presents a valuable opportunity for brands and promoters to align themselves with significant groups of concert attendees or festival-goers. In terms of interest, across the major markets of France, Germany, UK, USA and Japan, interest in music surpasses sport, watching television and film/cinema, underlining the power and potential of live music sponsorship. Furthermore, half of the 86 per cent interested in music profess to be ‘very interested’, highlighting music’s emotional pull. By way of comparison, only 41 per cent of people are ‘very interested’ in watching TV, 32 per cent ‘very interested’ in sport, and 45 per cent ‘very interested’ in films and cinema. In such a vibrant marketplace, the opportunity for brands is clear.
AUDIENCE

Whether attending a concert, travelling to a music festival or simply watching an artist perform at a club or pub, understanding the music audience is a fundamental for potential sponsors.

WHAT TYPES OF MUSIC ARE PEOPLE LISTENING TO AND INTERESTED IN?

While pop and rock music dominate the top five markets – and only in the USA do more people like rock than pop – further down the list market specific preferences become clearer. Rap and hip-hop, for example, is more popular in the United States than other markets, while 29 per cent of people in Japan, far more than any other market, like classical music. Electro and dance is most popular in France. Over two-thirds of people in the UK and USA enjoy alternative or indie music, although the definition of the genre is likely to mean different things to different people – artists and bands might initially describe themselves, or be described, as ‘alternative’ before gaining popularity and becoming more mainstream rock acts. Heavy rock and heavy metal, meanwhile, are the most polarising of the main music styles: 26 per cent globally ‘don’t like it at all’ compared to 4 per cent for pop and 7 per cent for rock.

Interest in different types of music

<table>
<thead>
<tr>
<th>Music Style</th>
<th>Pop</th>
<th>Rock</th>
<th>Rap/Hip-hop</th>
<th>RnB/Soul</th>
<th>Electro/Dance/Techno</th>
<th>Alternative/Indie</th>
<th>Hard rock/Heavy metal</th>
<th>Classical</th>
<th>Reggae</th>
<th>Folk</th>
</tr>
</thead>
<tbody>
<tr>
<td>France</td>
<td>53%</td>
<td>61%</td>
<td>48%</td>
<td>40%</td>
<td>38%</td>
<td>39%</td>
<td>38%</td>
<td>37%</td>
<td>36%</td>
<td>33%</td>
</tr>
<tr>
<td>Germany</td>
<td>61%</td>
<td>55%</td>
<td>55%</td>
<td>55%</td>
<td>40%</td>
<td>42%</td>
<td>40%</td>
<td>40%</td>
<td>36%</td>
<td>36%</td>
</tr>
<tr>
<td>UK</td>
<td>65%</td>
<td>47%</td>
<td>47%</td>
<td>41%</td>
<td>40%</td>
<td>40%</td>
<td>39%</td>
<td>37%</td>
<td>37%</td>
<td>36%</td>
</tr>
<tr>
<td>USA</td>
<td>58%</td>
<td>55%</td>
<td>55%</td>
<td>55%</td>
<td>55%</td>
<td>55%</td>
<td>55%</td>
<td>55%</td>
<td>55%</td>
<td>55%</td>
</tr>
<tr>
<td>Japan</td>
<td>51%</td>
<td>39%</td>
<td>39%</td>
<td>39%</td>
<td>39%</td>
<td>39%</td>
<td>39%</td>
<td>39%</td>
<td>39%</td>
<td>39%</td>
</tr>
</tbody>
</table>

Note: 16-34 year olds.
**EVENT ATTENDANCE**

More people across France, Germany, the UK, USA and Japan have attended a music festival than a major arena gig or pub or club show over the past 12 months. But as expected, given the costs of attending a festival or big stadium show, the majority of people attend only one major event per year. People are more likely to attend multiple concerts in a pub or club, in all likelihood because there are many more events of this type and ticket prices tend to be far cheaper. The proportion attending more than ten, though, remains small.

**SPENDING AT MUSIC EVENTS**

While the average ticket price per festival according to the five major markets is €75.5, significant differences emerge across the individual markets. Of the big five, France has the lowest average festival ticket price at €43, while the UK average is just over €112. British festival fans also spend the most on food and drink and travel and accommodation. Attendees of events such as Glastonbury and V Festival spend an average of just over €58 on food and drink whilst at a festival, and over €76 to travel to and from a venue and stay there.
New media and social platforms are allowing music fans to consume and share more content from concerts and festivals, opening up opportunities for promoters and sponsors.

The distribution power of the internet is clear when examining how music fans receive and digest information about live music events. General music websites and official event websites, where tickets can be purchased and line-ups are generally announced, are both popular sources, while over 40 per cent of fans across the five major markets also look to Facebook and friends and family for information: it is an indication that fans tend to inform themselves about an event, through websites or traditional media such as television, before sharing that information with friends, family and social communities. By market, television’s continuing significance is underlined while radio remains particularly relevant as an information source in the United States and France.

### WHERE ARE FANS FINDING INFORMATION ABOUT MUSIC EVENTS?

The chart below illustrates the top five markets for finding information about music events based on the percentage of fans across each market who use various sources.

### TOP 5 MARKETS

- **Facebook**: 43%
- **Friends/family**: 39%
- **TV**: 37%
- **General websites**: 36%
- **Official event website**: 32%

### MARKET BY MARKET

<table>
<thead>
<tr>
<th>Source</th>
<th>Japan</th>
<th>USA</th>
<th>UK</th>
<th>DEU</th>
<th>FRA</th>
</tr>
</thead>
<tbody>
<tr>
<td>TV</td>
<td>46</td>
<td>42</td>
<td>35</td>
<td>33</td>
<td>41</td>
</tr>
<tr>
<td>Radio</td>
<td>11</td>
<td>11</td>
<td>28</td>
<td>28</td>
<td>28</td>
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<tr>
<td>Daily newspapers</td>
<td>11</td>
<td>11</td>
<td>12</td>
<td>15</td>
<td>10</td>
</tr>
<tr>
<td>Specialist music magazines</td>
<td>17</td>
<td>16</td>
<td>14</td>
<td>14</td>
<td>14</td>
</tr>
<tr>
<td>Friends/family</td>
<td>11</td>
<td>11</td>
<td>8</td>
<td>52</td>
<td>45</td>
</tr>
<tr>
<td>Official event website</td>
<td>34</td>
<td>36</td>
<td>33</td>
<td>47</td>
<td>31</td>
</tr>
<tr>
<td>General websites</td>
<td>38</td>
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<td>35</td>
<td>47</td>
<td>47</td>
</tr>
<tr>
<td>Facebook</td>
<td>12</td>
<td>12</td>
<td>11</td>
<td>11</td>
<td>13</td>
</tr>
<tr>
<td>Twitter</td>
<td>28</td>
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<td>14</td>
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<tr>
<td>Instagram</td>
<td>3</td>
<td>3</td>
<td>7</td>
<td>9</td>
<td>7</td>
</tr>
<tr>
<td>YouTube</td>
<td>23</td>
<td>42</td>
<td>35</td>
<td>36</td>
<td>36</td>
</tr>
<tr>
<td>Apps (smartphone/tablet)</td>
<td>8</td>
<td>6</td>
<td>11</td>
<td>10</td>
<td>13</td>
</tr>
<tr>
<td>Email newsletter</td>
<td>8</td>
<td>8</td>
<td>12</td>
<td>11</td>
<td>7</td>
</tr>
</tbody>
</table>

Note: 0 – 50 per cent
THE IMPORTANCE – AND LONGEVITY – OF VOD

Unlike sport, which has traditionally benefited from major live coverage – and the attendant rights fees – major music events, especially festivals, are far more reliant on other forms of media distribution, such as VOD and social sharing to secure major audiences. Indeed VOD platforms are vital for festivals, as places where live performances can live on many weeks after an event, whereas sport tends to be more influenced by results and news and is therefore always producing new images. Across the top five markets, over 40 per cent of music fans say they sometimes watch music video clips on video sharing websites like YouTube, the same proportion as watch live broadcasts or recordings on TV. 39 per cent regularly watch live broadcasts or recordings via online streaming.

EXPOSURE, TOUCHPOINTS AND ACTIVATION

Opportunities for brand integration into a major festival can begin almost as soon as the previous year’s edition has concluded, starting with the opening ticket sales promotions and announcements of the line-up – these tend to be the first media touchpoints, resulting in coverage, discussion and sharing amongst fans. Various communications channels can be utilised in advance of the event. Often, sponsors rely on web-focused activation concepts which enable brand positioning and audience communication long before the actual event, followed later by on-site activities. Philipp Schmoll of Jägermeister confirms this, and adds: “Digital channels are by no means detached from the overall communication, but are strongly coupled with the analogue world”. A joined-up activation strategy will pay dividends.

With an average of eight hours per day of shows at a multi-day festival, sponsors have sufficient time to create exceptional brand experiences for fans. The on-site activities remain vital. As Lars-Oliver Vogt, CEO from The Sponsor People says: “High quality and direct contact with the event viewer remains the crown jewel on-site and has a special significance for music sponsors”.

THE THREE WAVES OF EXPOSURE
SPONSORSHIP

At festivals, concerts, venues or during tours sponsors are finding effective ways to activate, either on-site or by reaching a wider audience via media channels.

VENUE SPONSORSHIP

Major venues worldwide can attract anything between 500,000 and two million attendees per year, while the number of music events per year can range from 50 to 150. The flexibility built into major indoor and outdoor venues ensures they can switch from hosting a variety of sports events to a concert in a very short space of time. As well as the major indoor venues, several major open-air sports stadiums also host concerts on a semi-regular basis – prime examples are Wembley Stadium and the Emirates Stadium in London, MetLife Stadium in New Jersey and the recently-opened Levi’s Stadium in San Francisco. Major cities like London also boast parks which host major concerts, thanks to tie-ups with major promoters – AEG, for instance, has the contract for music events in London’s Hyde Park, while the Queen Elizabeth II Park, created for the London Olympics, features concerts promoted by Live Nation.

The world’s major music venues

MARKET BY MARKET

**USA**
- Philips Arena
  - Atlanta
  - Atlanta Hawks
- Radio City Music Hall
  - New York
  - no Team
- Staples Center
  - Los Angeles
  - LA Lakers, LA Clippers, LA Kings
- Barclays Center
  - Brooklyn
  - Brooklyn Nets, New York Islanders
- Madison Square Garden Arena
  - New York
  - New York Knicks, New York Rangers
- Red Rocks Amphitheatre
  - Morrison
  - no Team

**UK**
- The O2 – London
  - London
  - no Team
- Manchester Arena
  - Manchester
  - no Team
- The SSE Hydro
  - Glasgow
  - no Team
- Genting Arena
  - Birmingham
  - no Team

**NETHERLANDS**
- Ziggo Dome
  - Amsterdam
  - no Team
- Amsterdam Arena
  - Amsterdam
  - AFC Ajax

**MEXICO**
- Auditorio Nacional
  - Mexico City
  - no Team
- Foro Sol
  - Mexico City
  - no Team

**GERMANY**
- Barclaycard Arena
  - Hamburg
  - HSV Hamburg, Hamburg Freezers
- Lanxess Arena
  - Cologne
  - Kölner Haie
- Mercedes-Benz Arena
  - Berlin
  - Eisbären Berlin, Eisbären Berlin

**FRANCE**
- AccorHotels Arena
  - Paris
  - no Team
- Stade de France
  - Paris
  - no Team

**CANADA**
- Air Canada Centre
  - Toronto
  - Toronto Raptors, Toronto Maple Leafs

**AUSTRALIA**
- Rod Laver Arena
  - Melbourne
  - no Team
- Allphones Arena
  - Sydney
  - no Team

Source: Repucom Market Intelligence

Venues with a strong focus on music events and without a sports team as anchor tenant are shown in purple.
THE GLOBAL FESTIVAL LINE-UP

Every music festival has its own character which develops over time, shaped by the genre, those who attend, the venue itself and the artists who perform. Some have international recognition, while many have a distinctly domestic audience. The level of media coverage can also differ significantly. In some cases festivals are twinned on the same weekend and share a bill, largely for promotional and organisational reasons. Reading and Leeds in the UK are prime examples. A shared commercial structure at these events offers brands double the opportunity for on-site activation and higher media exposure.

FRANCE — Rock en Seine is a three-day rock festival which has taken place each year in Paris since 2003. Kasabian, The Libertines and The Chemical Brothers headlined in 2015. Vieilles Charrues, in Brittany, is France’s largest festival.

GERMANY — Rock am Ring and Rock im Park take place simultaneously and share line-ups over the same weekend. Hip hop and Reggae festival Splash! is not amongst Germany’s largest festivals, but benefits from a strong media footprint.

UK — Glastonbury receives significant media coverage across BBC platforms in the UK each year, while August’s V Festival has been a fixture since 1996. Also in August, the Reading Festival is twinned with Leeds Festival, sharing a bill.

USA — Lollapalooza is currently staged in Chicago, while Coachella is the highest grossing music festival in the world. The Vans Wiped Tour is a travelling punk and alternative festival, while South by Southwest (SXSW) has grown from a music conference into a major film, music and technology showcase.

JAPAN — The Fuji Rock Festival is Japan’s largest festival and has taken place at Naeba Ski Resort in Niigata since 1990. Summer Sonic is staged simultaneously in Osaka and Chiba. Countdown Japan is a four-day festival staged in the run-up to New Year’s Eve.

Top 5 by Markets

<table>
<thead>
<tr>
<th>Country</th>
<th>Festival</th>
<th>Visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>France</td>
<td>Rock en Seine</td>
<td>68,000</td>
</tr>
<tr>
<td>France</td>
<td>Vieilles Charrues Festival</td>
<td>72,000</td>
</tr>
<tr>
<td>France</td>
<td>Eurockéennes de Belfort</td>
<td>75,000</td>
</tr>
<tr>
<td>France</td>
<td>Hellfest Summer Open Air</td>
<td>59,000</td>
</tr>
<tr>
<td>France</td>
<td>La Route du Rock</td>
<td>55,000</td>
</tr>
<tr>
<td>Germany</td>
<td>Rock am Ring</td>
<td>59,000</td>
</tr>
<tr>
<td>Germany</td>
<td>Wacken Open Air</td>
<td>63,000</td>
</tr>
<tr>
<td>Germany</td>
<td>Rock im Park</td>
<td>76,000</td>
</tr>
<tr>
<td>Germany</td>
<td>Hurricane Festival</td>
<td>75,000</td>
</tr>
<tr>
<td>Germany</td>
<td>Splash! Festival</td>
<td>76,000</td>
</tr>
<tr>
<td>UK</td>
<td>Glastonbury</td>
<td>85,000</td>
</tr>
<tr>
<td>UK</td>
<td>V Festival</td>
<td>85,000</td>
</tr>
<tr>
<td>UK</td>
<td>T in the Park</td>
<td>85,000</td>
</tr>
<tr>
<td>UK</td>
<td>Reading Festival</td>
<td>69,000</td>
</tr>
<tr>
<td>UK</td>
<td>Isle of Wight Festival</td>
<td>75,000</td>
</tr>
<tr>
<td>USA</td>
<td>Lollapalooza</td>
<td>74,000</td>
</tr>
<tr>
<td>USA</td>
<td>Coachella Valley Music and Arts Festival</td>
<td>74,000</td>
</tr>
<tr>
<td>USA</td>
<td>Summerfest</td>
<td>76,000</td>
</tr>
<tr>
<td>USA</td>
<td>Vans Wipped Tour</td>
<td>77,000</td>
</tr>
<tr>
<td>USA</td>
<td>South by Southwest</td>
<td>77,000</td>
</tr>
<tr>
<td>Japan</td>
<td>Fuji Rock Festival</td>
<td>66,000</td>
</tr>
<tr>
<td>Japan</td>
<td>Summer Sonic</td>
<td>68,000</td>
</tr>
<tr>
<td>Japan</td>
<td>Countdown Japan</td>
<td>68,000</td>
</tr>
<tr>
<td>Japan</td>
<td>Rock in Japan</td>
<td>68,000</td>
</tr>
<tr>
<td>Japan</td>
<td>Rising Sun Rock Festival</td>
<td>68,000</td>
</tr>
</tbody>
</table>

Base: 18-34 year olds.
THE MOST RECOGNISABLE MUSIC BRANDS AND HOW FANS REACT TO LIVE MUSIC SPONSORSHIP

Coca-Cola is the most recognised music sponsor in the world. Over the years its portfolio has included venues, festivals, tours, artists, broadcast sponsorship of music entertainment shows like American Idol and a tie-up with Apple’s iTunes service. Like rival Pepsi, it is a longstanding investor in sponsorship of music entertainment shows like American Idol and a tie-up

CASE STUDY

LIDL’S ROCKSHOP

At this year’s Rock Am Ring festival, held at the former air force base in Mendig after many years at the Nurburgring, supermarket chain Lidl was present and activating through its Lidl RockShop. The RockShop is a pop-up supermarket, covering around 2,000m², and selling over 160 food, drink and hygiene products to festival-goers.

The size of the temporary facility means it has the potential to cater for the 90,000 festival attendees, with employees working in three shifts and products re-stocked throughout a festival weekend. In short, the RockShop means festival-goers no longer need to carry food and drink with them as they travel to a festival site.

A joint collaboration between Lidl and The Sponsor People, the activation seems to have struck a chord. The announcement of the Lidl RockShop at Rock Am Ring resulted in over 5,000 Facebook ‘likes’, while post-event research showed that that nearly 60 per cent of attendees shopped in the facility. 96 per cent of attendees, meanwhile, said they loved the concept, with nearly 86 per cent stating they would be doing their whole shop at the Lidl RockShop at the following year’s event.

What are music fans interested in? (%)

SMARTPHONES

TRAVELLING

CARD/ONLINE SERVICES

CONSUMER ELECTRONICS (TV, CAMERAS, HI-FI)

MUSIC STREAMING SERVICES

BEER

INSURANCE/FINANCIAL SERVICES

TOBACCO

What do music fans notice sponsors? (%)

Following a festival/concert on-site

Following a festival/concert in the media

Following a festival/concert on radio

Following a festival/concert in the media

Following an artist/brand in the media

I can’t remember

Awareness of sponsors

TOP 5 MARKETS COMBINED

1. COCA-COLA
2. RED BULL
3. PEPSI
4. OZ
5. HEINEKEN

CASE STUDY

BECK’S: HENNER HÖPER, MARKETING DIRECTOR, ANHEUSER-BUSCH INBEV GERMANY

“The key element of all our communications is for consumers to get a live experience of our brand. A festival is the best possible place to experience this. Sponsorship is an integral component of our communications strategy and we are proud that we have partnerships in many different genres. In terms of awareness, Beck’s is one of the leading companies in the field of music sponsorship.

“Sponsorship isn’t only defined by the transfer of goods and financial support in exchange for advertising space. We link our sponsorships to our current communications every time. If we are to support an event we should understand who the key target group is and accordingly shape our imaging. We load up the brand with values like freedom and internationality – and it also stands for discovering new things. We also try to offer interaction. As a general rule concerts offer interaction, but we are also searching for additional value – for example, by organising a special ‘meet and greet’ with an artist.

On a festival weekend we achieve some two million direct contacts, but it isn’t enough to hang up banner advertising on a stage. We organise activations like the Beck’s Truck, a beer pre-order service and other accompanying activations. That gives us presence and additional value; a TV spot is unlikely to provide this intensity (of exposure). To cut a long story short, you can watch a TV spot a hundred times but it will not accompany activations. That gives us presence and additional value; a TV spot is unlikely to provide this intensity (of exposure). To cut a long story short, you can watch a TV spot a hundred times but it will not
ARTISTS

As the business model underpinning the music industry evolves, the world’s major artists are exploring new ways to connect with fans and generate revenues.

PLAYING TO THE CROWDS

Successful music acts come and go – popularity is generally measured in sales, number of downloads and tour revenues, but credibility can be harder to gain and quantify – virtually by the month, but for a select few breakout chart success can turn into a lucrative and lengthy career; indeed, there are world-renowned performers – amongst them Sir Elton John, Stevie Wonder, U2 and the Rolling Stones – who continue to sell out shows around the world many years after their last number one chart hit. For the major global acts of 2015, tour sponsorships and brand endorsements are not uncommon – artist reluctance to partner with corporate brands seems to be waning, with the changing dynamics of the music industry prompting a search for new revenue streams and ways to connect with a fan base. Partnerships with the right brands can be a valuable way to achieve both. Several of the world’s major artists are now effectively the CEOs of their own corporations, with their own product ranges. As Adele, who eschews brand endorsements, proved in late 2015, though, there is more than one way for an artist to be successful.

<table>
<thead>
<tr>
<th>Artist</th>
<th>Shows</th>
<th>EST. Ticket Sales</th>
</tr>
</thead>
<tbody>
<tr>
<td>ONE DIRECTION</td>
<td>80</td>
<td>2.34 M</td>
</tr>
<tr>
<td>FLEETWOOD MAC</td>
<td>44</td>
<td>591 K</td>
</tr>
<tr>
<td>TAYLOR SWIFT</td>
<td>71</td>
<td>1.98 M</td>
</tr>
<tr>
<td>KENNY CHESNEY</td>
<td>67</td>
<td>1.34 M</td>
</tr>
<tr>
<td>LUKE BRYAN</td>
<td>55</td>
<td>1.01 M EST. Ticket Sales</td>
</tr>
<tr>
<td>SHANIA TWAIN</td>
<td>68</td>
<td>687 K EST. Ticket Sales</td>
</tr>
<tr>
<td>MAROON 5</td>
<td>62</td>
<td>890 K EST. Ticket Sales</td>
</tr>
<tr>
<td>BILLY JOEL</td>
<td>29</td>
<td>625 K EST. Ticket Sales</td>
</tr>
<tr>
<td>THE ROLLING STONES</td>
<td>18</td>
<td>710 K EST. Ticket Sales</td>
</tr>
<tr>
<td>U2</td>
<td>64</td>
<td>1.13 M EST. Ticket Sales</td>
</tr>
<tr>
<td>MAROON 5</td>
<td>62</td>
<td>890 K EST. Ticket Sales</td>
</tr>
</tbody>
</table>

Source: Billboard/Boxscore (Nov 2014 – Nov 2015)
The world’s major international music acts are global brands in their own right, using a variety of platforms and touchpoints to connect with fans and ultimately generate revenue – everything from tours to merchandise to major brand collaborations. The age of Twitter, Facebook and Instagram has allowed for the most astute artists to generate a closer, more personal, authentic and interactive relationship with fans. Celebrity Davie Brown Index (DBI) is a tool which can measure the public’s perceptions of over 8,000 personalities across 15 markets around the world, representing the views of over 1.5 billion people. It can look at specific demographics – in this case, the most marketable solo artists of 2015 amongst Americans aged between 13 and 24 – to give a clear identification of how audiences consider a personality and, how personalities compare to one another. Here, then, are the most marketable artists of 2015.

### The Most Marketable Artists

#### The Top Ten Countdown

<table>
<thead>
<tr>
<th>Rank</th>
<th>DBI</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>88.5</td>
<td>Taylor Swift</td>
</tr>
<tr>
<td>2</td>
<td>86.4</td>
<td>Justin Timberlake</td>
</tr>
<tr>
<td>3</td>
<td>85.1</td>
<td>Lady Gaga</td>
</tr>
<tr>
<td>4</td>
<td>85.1</td>
<td>Katy Perry</td>
</tr>
<tr>
<td>5</td>
<td>84.6</td>
<td>Beyoncé Knowles</td>
</tr>
<tr>
<td>6</td>
<td>82.9</td>
<td>Snoop Dogg</td>
</tr>
<tr>
<td>7</td>
<td>82.1</td>
<td>Nick Jonas</td>
</tr>
<tr>
<td>8</td>
<td>81.8</td>
<td>Britney Spears</td>
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<tr>
<td>9</td>
<td>81.8</td>
<td>Nicki Minaj</td>
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<tr>
<td>10</td>
<td>81.6</td>
<td>Bruno Mars</td>
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Controversial but undoubtedly a major breakout star, Snoop Dogg has released 13 studio albums and a further eight collaborations since his debut, Doggystyle, in 1993, in addition to his work as an actor in film and television. He has also developed a diverse business and commercial portfolio, appearing as an ambassador for a long list of brands as his gangster image has softened. In an extension of the traditional brand ambassador role, Adidas named him as Director of Football Development midway through 2015, launching an accompanying range of Snoop-branded cleats.

One half of music’s premier power couple, Beyoncé has become a major global brand in her own right since Destiny’s Child disbanded in 2001. Multi-million dollar revenues from tours and albums have followed, as have a string of major endorsement deals: her 2012 brand ambassador partnership with Pepsi is worth a reputed $50 million. Her other partners over the past decade have included American Express and L’Oréal. More recently she has embarked on a joint venture with Topshop and become a co-owner, alongside husband Jay-Z, of music streaming service Tidal.

Katy Perry’s breakthrough hit, I Kissed A Girl, was released in 2008, propelling her to global stardom which has been nurtured through a series of record-breaking album releases and a documentary movie, Katy Perry: Part Of Me. Her mass-market appeal was underlined by the diverse sponsor roster for the North American leg of six global legs of her AEG Live-promoted Prismatic World Tour in 2014: partner brands included Citi, as official credit card, cosmetics firm Covergirl and presenting partner Staples, the office supplies retailer.

### Case Study

**Evan Greene – Chief Marketing Officer, The Recording Academy**

“We are a not-for-profit trade organisation designed to improve the cultural condition of music and its makers. We serve the music industry in various ways and we have become globally famous based on the single television event we produce once a year, the GRAMMY Awards.

“The dynamics of the music industry as a whole is changing radically. I think what you’re seeing is in a lot of ways the revenue model is different today than it’s been before, and artists realise that in order to get paid they’re generally a lot more amenable to marketing partnerships, whereas in the past it was a little bit taboo. You have brands that have become a lot more innovative. I believe you have artists that have become a lot more open to working with brands, and there’s so much money that’s been put on the line by promoters that they need a way to recoup a lot of that. Partnership marketing has become a really good revenue line item...”

“Brands can really take advantage of that. There’s new ways to distribute music, there’s new ways to engage and interact with fans. The smarter brands have become more sophisticated and authentic in the way they try to reach fans and it’s not just about getting a cheque, it’s about even those who can help bring incremental visibility and who can help provide greater exposure. Brands have become an interesting way to do that. Music has a different type of connection with people. I think brands that do it right really are able to create a deeper connection with fans. That’s something that I think lasts.

“There’s always been a real intersection between music and technology, I believe that’s absolute, and I see that continuing. I see artists continuously using technology in new ways to create music, and technology allowing new ways for fans to consume music. I think technology empowers artists, and will continue to bring fans and artists closer together. Brands can really take advantage of that. There’s new ways to distribute music, there’s new ways to engage and interact with fans. The smarter brands have become more sophisticated and authentic in the way they try to reach fans and it’s not just about getting a cheque, it’s about even those who can help bring incremental visibility and who can help provide greater exposure. Brands have become an interesting way to do that. Music has a different type of connection with people. I think brands that do it right really are able to create a deeper connection with fans. That’s something that I think lasts.”

Since 2009, Swift has had endorsement and collaboration deals in place with the likes of Elizabeth Arden, Diet Coke, CoverGirl, Sony, Levi jeans and Keds, but her popularity and appeal has taken another leap in more recent times as she has moved from her country music roots to a fully-fledged pop artist – according to Forbes, she made some $80 million between June 2014 and June 2015, as her album 1989 was released. She also demonstrated her industry-influence in 2015 by refusing Apple permission to stream the album, prompting a change of policy by the company – it reversed a decision not to pay artists for music streamed during a three-month trial period. She remains signed to Tennessee-based Big Machine Records, which specialises in country music artists. As of mid-November 2015, her official Twitter handle was followed by no fewer than 66.2 million people.
WHAT NEXT IN LIVE MUSIC SPONSORSHIP?

While technological advances have opened up a raft of exciting possibilities, in terms of connections with fans and distribution of content, on-site activation remains at the heart of many sponsors’ commitment to music, and is often driven by passion and innovation.

Before that, however, there are a multitude of touchpoints in anticipation of the event, where promoters and brands can help to stoke interest and discussion. “As we talk with potential partners, we attach great importance to the understanding that advertising services should be activated long before the actual event,” notes Folkert Koopmans, Managing Director of FKP Scorpio, currently the promoter of 16 festivals. “We connect with our visitors for the whole year and at the different peak times that can be accompanied by communications from our partners.”

Especially at multi-day festivals, activations including visitor amenities, such as clean showers, charging stations for smartphones and parking, are looked upon particularly favourably. “For newcomers especially, it is recommended to make the subject of the activation the basic needs of event visitors, to ensure that an on-site activation doesn’t lack clarity or sense,” confirms Philipp Schmoll, the Director of Marketing at Jägermeister.

As many visitors to music events indicate that the most important reason for their visit is to spend a day or weekend with friends, sponsors should look to provide unique opportunities and shared experiences: a secret backstage concert can, for example, provide an unforgettable moment.

Further enhancements to smartphone battery life, or more charging stations at venues, plus better Wi-Fi connectivity across festival sites will have significant implications for festival-goers, event organisers and sponsors. “Understanding the basic needs of music fans is key to a successful activation,” says Lars-Oliver Vogt, CEO at The Sponsor People. “Music sponsorship has never only been about billboards and business seats; we have always tried to ensure that our sponsors provide additional value to fans. Originally, bringing brands into rock’n’roll felt like a commercial sell-out, but in recent years we have learnt that our platforms – i.e. music festivals – provide truly unique opportunities for brands to reach out to millennials first hand. A good campaign might reach millions, but a great story at the right moment might change a fan’s perception of a brand forever.”

Delivering effective live music sponsorship campaigns

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FOLKERT KOOPMANS, FKP SCORPIO

IT IS THE POSTS OF STARS THAT WILL ALWAYS BE REGARDED WITH ENVY BACK HOME.

LARS-OlIVER VOGT, THE SPONSOR PEOPLE

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BRAND-FIT, ORIGINALITY, ENTERTAINMENT VALUE

INTERACTIVITY, UNIQUE OPPORTUNITIES, GROUP EXPERIENCES

BASIC NEED, FOR SELF-EXPRESSION

BATTERY, WIFI
As the trusted partner in sports and entertainment intelligence, we offer a single source of industry leading research, monitoring, analysis and consultancy. With over 30 years’ experience our global network and connected solutions support you in maximising your revenues. Let’s get connected.

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WE WATCH
WE LISTEN
WE ADVISE

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