

2017 POLLSTAR YEAR END Business ANALYSIS

2017 YEAR END TOP 100 Worldwide Tours



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RECORD CRUSHING YEAR

Live music continues to demonstrate its growing popularity making 2017 a record crushing year for the concert business.

The Top 100 Worldwide Tours alone generated a record \$5.65 billion in revenues. That represents a huge, 15.8% increase over the previous year. The total tickets sold by the Top 100 was also a record at 66.79 million. That's up a remarkable 10.4% over 2016. And it was

all done with a record average ticket price of \$84.63, which is an increase of \$3.97, or nearly 5%.

U2 did the highest grossing tour worldwide at \$316 million and the band's North American segment also topped that chart at \$176.1 million.

There were 11 tours that generated more than \$100 million worldwide as compared to seven tours in 2016. The most successful artists are clearly getting better at recapturing some of the revenue that had leaked into the secondary ticket market.

TRACKING A GROWING BUSINESS

Pollstar produces two kinds of charts for tracking the concert industry. Our marquee charts are the Top 100 Worldwide Tours and the Top 200 North American Tours charts. Both charts contain estimates for any unreported shows in order to provide a more realistic indicator of an artist's relative position in the marketplace. In most cases, very little needs to be projected although there are always outliers like Garth Brooks that require more research. Pollstar has an average of 90% of the data on the Top 100 Worldwide Tours. We have complete information on 40 tours that did not require any projections.

The Pollstar 2017 box office database contains a record number of show reports totaling nearly \$10 billion in revenues, which is a huge 10.3% over 2016. Total tickets reported sold also hit a record 152.8 million or 3.6% increase.

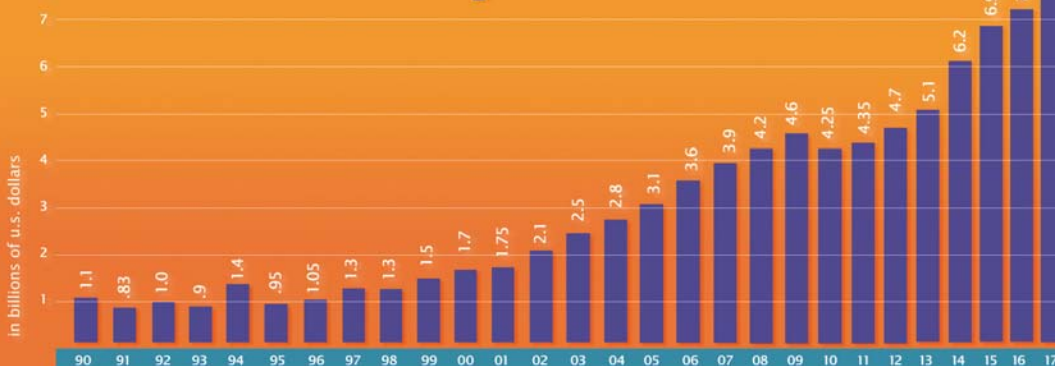
The Worldwide Ticket Sales charts found on pages 28-47 are based strictly on detailed box office reports voluntarily reported

| | | |
|------|-----------------------|-------|
| 2017 | U2 | 176.1 |
| 2016 | Beyoncé | 169.4 |
| 2015 | Taylor Swift | 199.4 |
| 2014 | One Direction | 127.2 |
| 2013 | Taylor Swift | 110.6 |
| 2012 | Madonna | 133.7 |
| 2011 | U2 | 156.0 |
| 2010 | Bon Jovi | 108.2 |
| 2009 | U2 | 123.0 |
| 2008 | Madonna | 105.3 |
| 2007 | The Police | 133.2 |
| 2006 | The Rolling Stones | 138.5 |
| 2005 | The Rolling Stones | 162.0 |
| 2004 | Prince | 87.4 |
| 2003 | Bruce Springsteen | 115.9 |
| 2002 | Paul McCartney | 103.3 |
| 2001 | U2 | 109.7 |
| 2000 | Tina Turner | 80.2 |
| 1999 | The Rolling Stones | 64.7 |
| 1998 | Elton John | 46.2 |
| 1997 | The Rolling Stones | 89.3 |
| 1996 | KISS | 43.6 |
| 1995 | Eagles | 63.3 |
| 1994 | The Rolling Stones | 121.2 |
| 1993 | Grateful Dead | 45.6 |
| 1992 | U2 | 67.0 |
| 1991 | Grateful Dead | 34.7 |
| 1990 | New Kids On The Block | 74.1 |
| 1989 | The Rolling Stones | 98.0 |
| 1988 | Pink Floyd | 27.6 |

in millions of u.s. dollars

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NORTH AMERICAN year end 2017 CONCERT Industry Ticket Sales



All figures are POLLSTAR's estimate for major concert tickets sold in North America.

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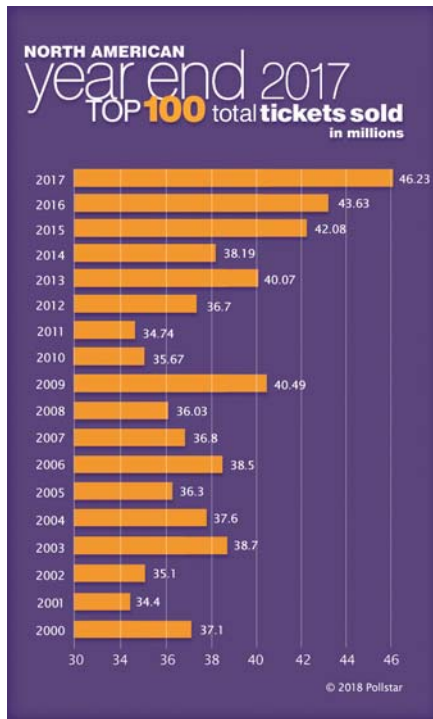
to Pollstar and provide an extra metric to compare the competitive success of various venues types.

The importance of the growing global concert market is readily evident in an examination of the top 20 venues on the Arena Ticket Sales chart. Only seven are located in the U.S. while five were from the U.K., including The O2 London at No. 1. Two are in Mexico, and there's one each in Germany, Spain, Canada, France, Netherlands, and Belgium.

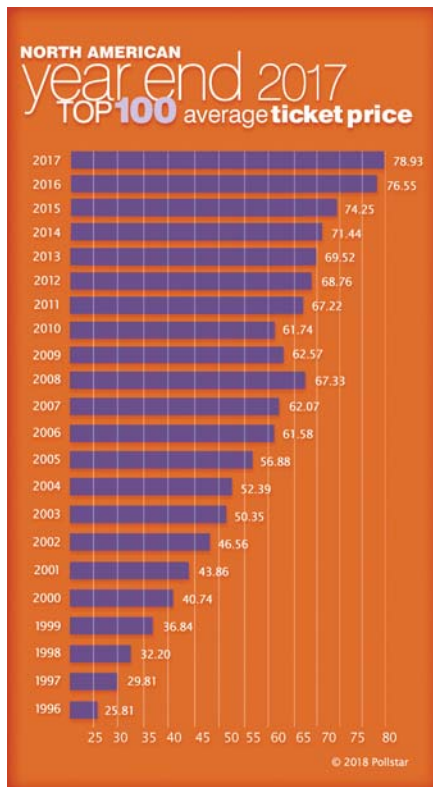
GLOBAL PROMOTERS

It's been a very great year for Live Nation Entertainment, which started the year with a

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stock price around \$26.60 per share and hit an all-time high of \$46.99 before closing the year at a little over \$42. Little surprise that CEO Michael Rapino and his team were awarded new contracts at the end of the year.



Live Nation was by far the world's largest concert promoter and reported to Pollstar a record 52.5 million tickets sold around the globe.

AEG was again a solid No. 2 among promoters reporting 14.4 million tickets sold. OCESA/CIE was No. 3 at about 4 million tickets. SJM was the top U.K. based promoter with nearly 2.4 million tickets sold.

BIG GROSSES

U2 generated the year's top concert gross with \$32.8 million from 278,718 fans over four shows in Sao Paulo,

Brazil. U2 also did the largest show in North America with \$15.8 million from its two shows at the Rose Bowl. The 13-show run by Phish at Madison Square Garden was second at \$15 million.

Huge numbers were also posted by Paul McCartney at the Tokyo Dome (\$22.4 million), Coldplay in Paris at the old Stade de France (\$19.9 million), The Rolling Stones at the new U Arena stadium outside Paris (\$18.5 million), and Guns N' Roses at London Stadium (\$17.3 million).

Coachella generated the year's single biggest festival gross with an amazing \$114.6 million over its two weekends.

BREAKING BIG

In addition to the usual touring suspects, it was a breakout year for new arena headliners The Weeknd, Ariana Grande, Kendrick Lamar, and Chris Stapleton. Also taking major steps up the career ladder were Shawn Mendes, The Chainsmokers, Hans Zimmer, Future, Sam Hunt, and Chance The Rapper.

The industry's prospects for 2018 are buoyed by the growth of new talent as the baby boomer bands that have been the year-in, year-out staples slowly age their way into the background, although some, like Eagles, have managed to



return to active duty with a bolstered lineup.

Despite what the *New York Post* or frustrated ticketbrokers say, it looks like Taylor Swift is clearly the early front-runner for biggest tour of the new year.



NORTH AMERICAN year end 2017 TOP 50 grossing tours of all time

| Rank | Gross (in millions of u.s. dollars) | Artist | Year |
|------|-------------------------------------|----------------------------------|------|
| 1 | 199.4 | Taylor Swift | 2015 |
| 2 | 176.1 | U2 | 2017 |
| 3 | 169.4 | Beyoncé | 2016 |
| 4 | 162.0 | The Rolling Stones | 2005 |
| 5 | 156.0 | U2 | 2011 |
| 6 | 138.9 | U2 | 2005 |
| 7 | 138.5 | The Rolling Stones | 2006 |
| 8 | 133.7 | Madonna | 2012 |
| 9 | 133.2 | The Police | 2007 |
| 10 | 130.8 | Guns N' Roses | 2016 |
| 11 | 127.2 | One Direction | 2014 |
| 12 | 123.0 | U2 | 2009 |
| 13 | 122.4 | Bruce Springsteen & E St. Band | 2016 |
| 14 | 121.2 | The Rolling Stones | 1994 |
| 15 | 116.4 | Kenny Chesney | 2015 |
| 16 | 115.9 | Bruce Springsteen & E St. Band | 2003 |
| 17 | 114.9 | Garth Brooks | 2015 |
| 18 | 112.9 | Cirque du Soleil/Michael Jackson | 2012 |
| 19 | 112.4 | Bruno Mars | 2017 |
| 20 | 110.6 | Taylor Swift | 2013 |
| 21 | 110.3 | Metallica | 2017 |
| 22 | 109.7 | Rolling Stones | 2015 |
| 23 | 109.7 | U2 | 2001 |
| 24 | 108.2 | Bon Jovi | 2010 |
| 25 | 107.3 | Bon Jovi | 2013 |
| 26 | 105.3 | Madonna | 2008 |
| 27 | 104.7 | Bruce Springsteen & E St. Band | 2012 |
| 28 | 103.5 | Pink Floyd | 1994 |
| 29 | 103.3 | Paul McCartney | 2002 |
| 30 | 101.4 | Garth Brooks | 2017 |
| 31 | 98.0 | Guns N' Roses | 2017 |
| 32 | 98.0 | The Rolling Stones | 1989 |
| 33 | 97.7 | Taylor Swift | 2011 |
| 34 | 97.0 | Garth Brooks | 2016 |
| 35 | 96.5 | Kenny Chesney/Tim McGraw | 2012 |
| 36 | 96.0 | Beyoncé / Jay Z | 2014 |
| 37 | 95.1 | Adele | 2016 |
| 38 | 94.5 | Bruce Springsteen & E St. Band | 2009 |
| 39 | 94.3 | Katy Perry | 2014 |
| 40 | 94.0 | Celine Dion | 2008 |
| 41 | 92.5 | Barbra Streisand | 2006 |
| 42 | 92.1 | Roger Waters | 2017 |
| 43 | 90.9 | Kenny Chesney | 2013 |
| 44 | 90.2 | Roger Waters | 2012 |
| 45 | 89.6 | Justin Bieber | 2016 |
| 46 | 89.5 | Roger Waters | 2010 |
| 47 | 89.3 | The Rolling Stones | 1997 |
| 48 | 88.8 | Tim McGraw / Faith Hill | 2006 |
| 49 | 88.0 | Elton John / Billy Joel | 2009 |
| 50 | 87.9 | The Rolling Stones | 2002 |