

THE CHANGING FACE OF CHINA'S MUSIC MARKET

MUSICDISH*CHINA, MAY 2017

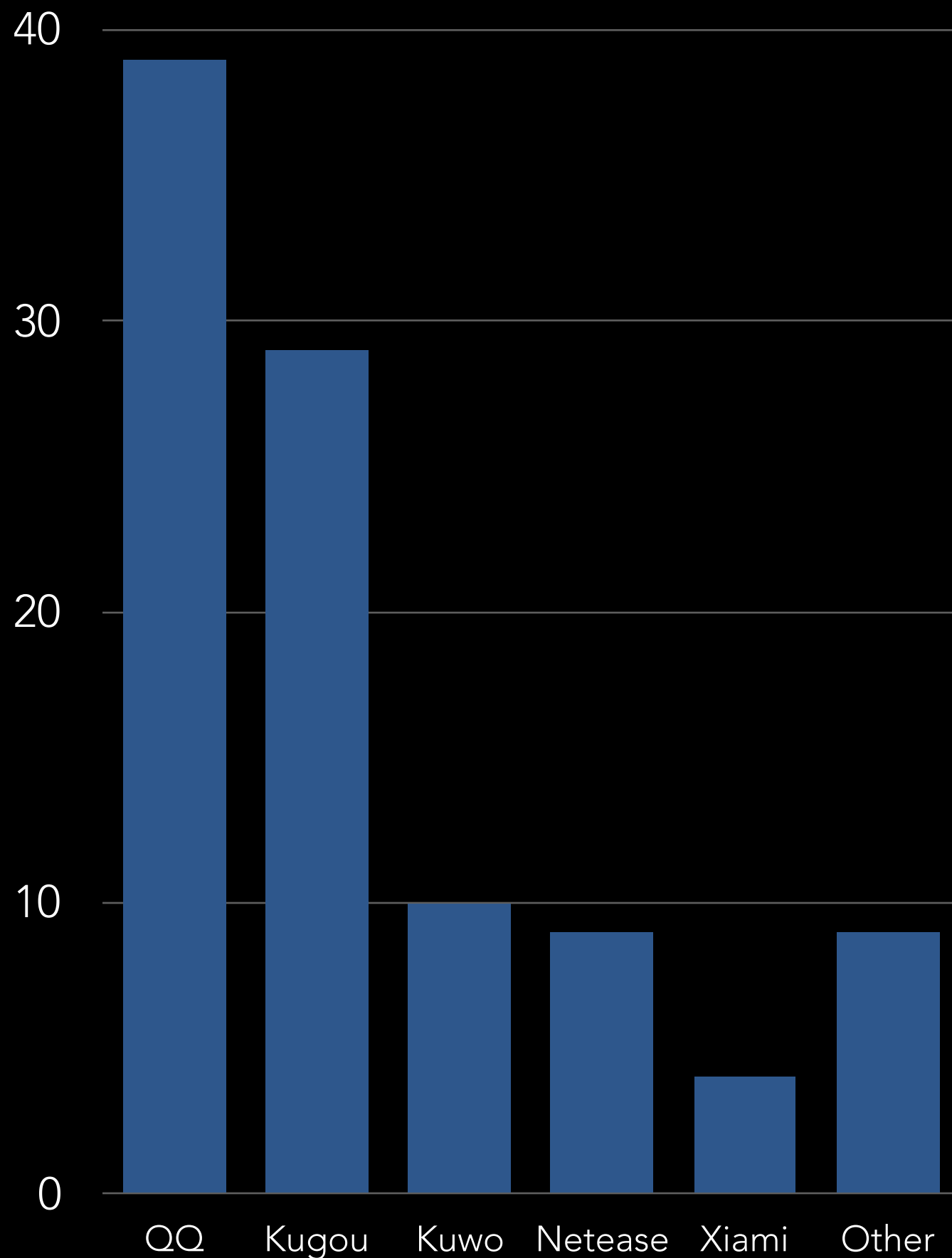


CHINA'S OLD MUSIC INDUSTRY



CHANGING LANDSCAPE

- 2013 estimated value of recorded music industry of US\$82.6 million (5.6% increase), 21st largest (IFPI)
- 2015 estimated value of recorded music industry of US\$169.7 million (63.8% increase), 14th largest (IFPI)
- 2016 value of recorded music industry grew 20.3% on 30.6% increase in streaming revenue, 12th largest (IFPI)
- Digital music industry compound annual growth rate (2011-15): +28.5% (Nielsen)
- Government policy: copyright law and enforcement
- Market consolidation & music licensing
- Shift to smartphone, lower mobile data cost, increased connectivity



Tencent: QQ +
Kugou + Kuwo ~
78%



NetEase
cloud music
Listen, good time!

Netease 9%

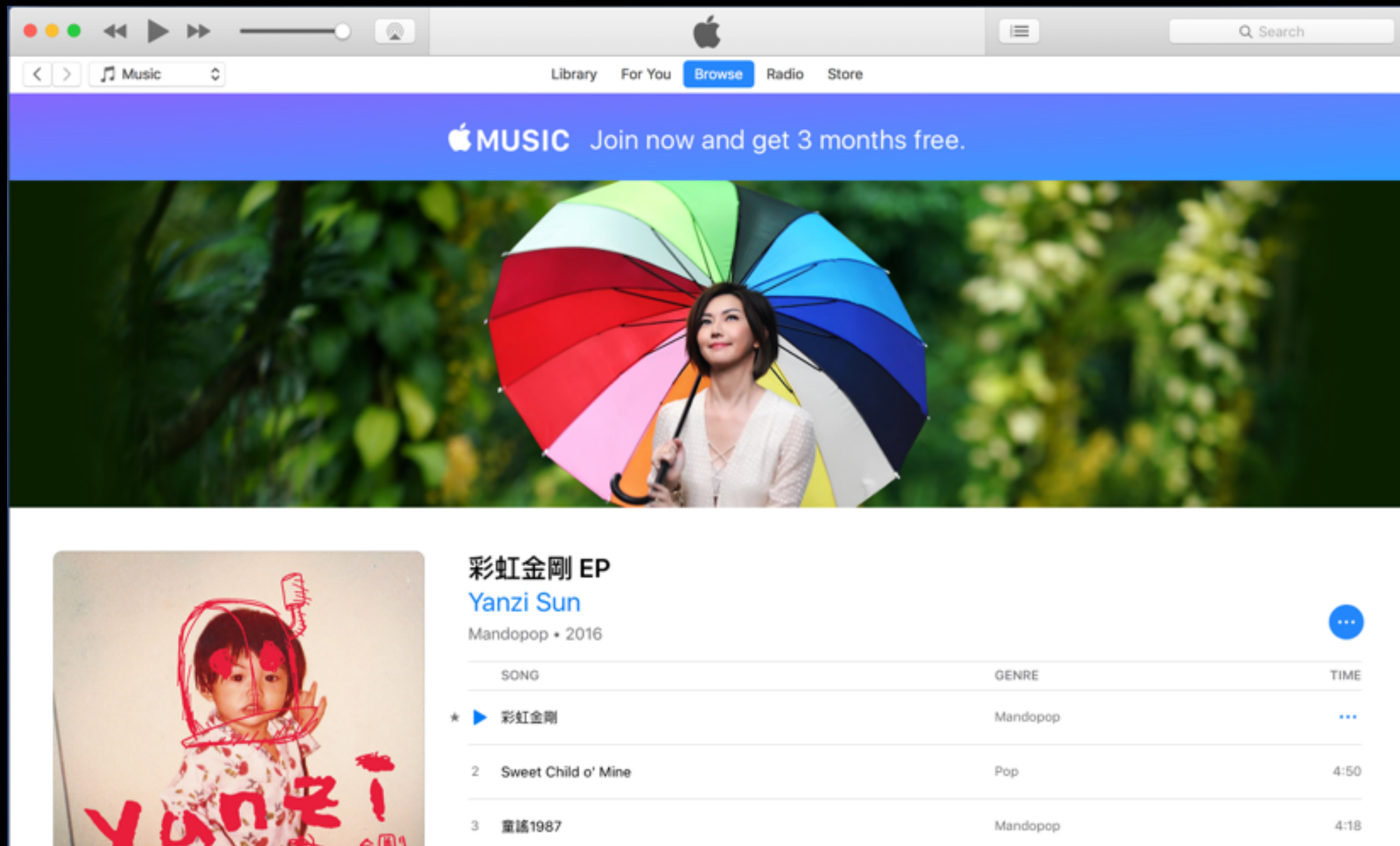


Xiami (Alibaba)
4%

Other: Baidu, Apple
Music,... 9%

STEFANIE SUN & APPLE MUSIC

- EP "RAINBOW BOT" EXCLUSIVELY ON APPLE MUSIC
- EXCLUSIVE 3 MINUTE DOCUMENTARY
- RANKED NUMBER 4 FOR "5 CAN'T-MISS APPLE MUSIC EXCLUSIVE ALBUM"



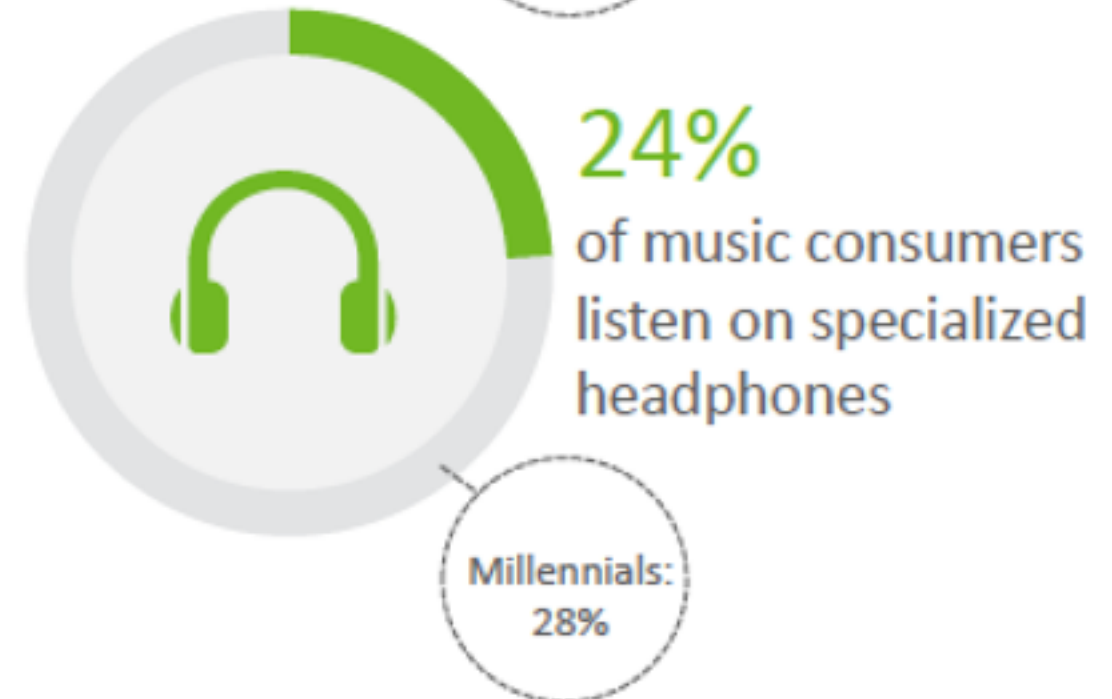
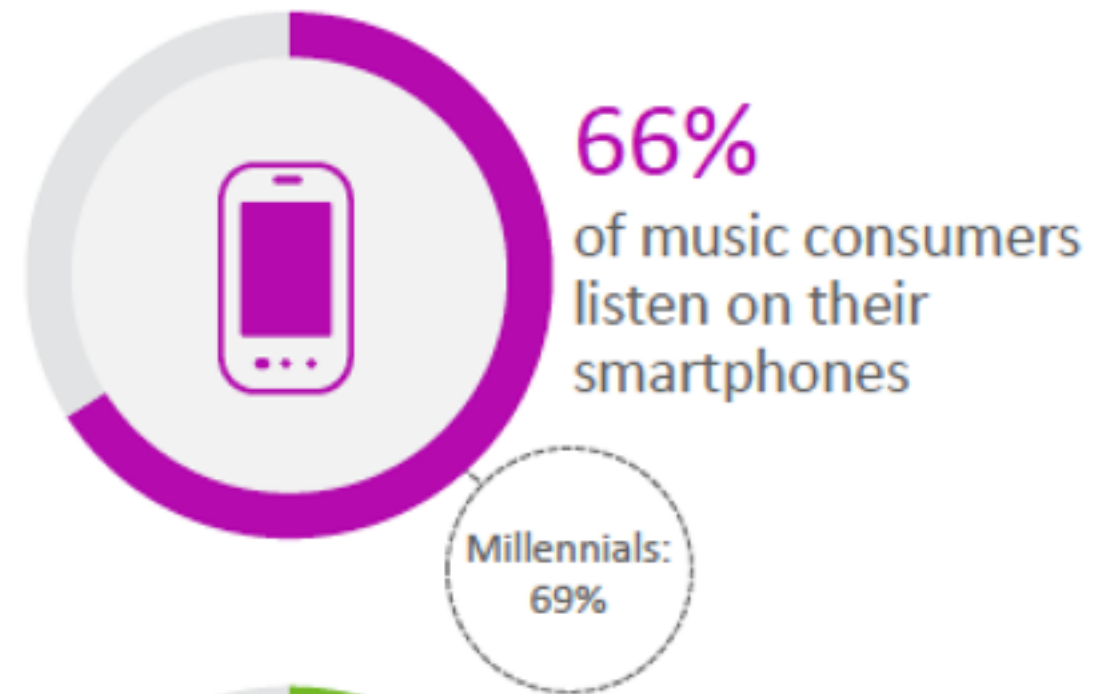
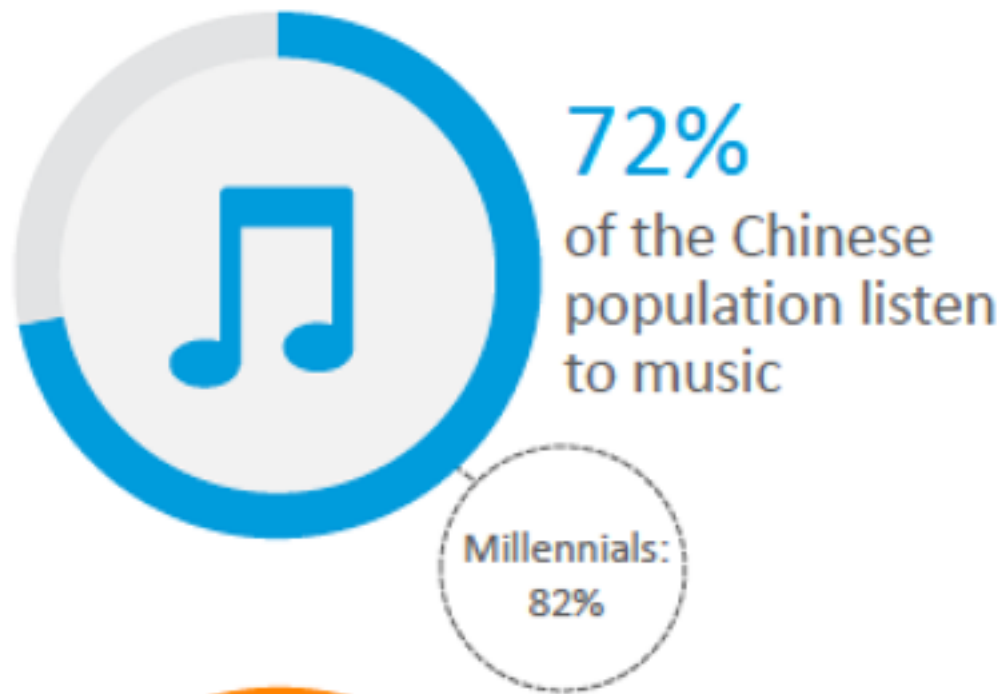
STREAMING WARS: TENCENT VS. NETEASE

- 10th most valued company, world's largest video game company by revenue, WeChat has 889M active users
- Tencent has 600M active monthly users and over 15M paying music subscribers
- QQ Music has 200M active monthly users
- Combined with Kuwo and Kugou (CMC acquisition), control 77% of music streaming market
- NetEase Music Cloud recently joined ranks of unicorns
- Netease has over 300M active monthly users

MOBILE MUSIC LANDSCAPE

- 2015 mobile music industry US\$945 million
- Estimated 2016 mobile music industry US\$1.4 billion
- 70% of online music listeners use smartphone (iResearch)
- 64.5% of mobile music listeners have 2 (40%) or 3 music apps (iResearch)
- 75% of digital music listeners access app at least once a month, 60% daily for 1-3 hours (eMarketer)

DIGITAL MUSIC LISTENERS (NIELSEN)



DIGITAL MUSIC LISTENERS (NIELSEN)

TIER 1	TIER 2	TIER 3
Includes Beijing, Shanghai, and Guangzhou (N=728)	Includes Shenyang, Chengdu, Nanjing, and Wuhan among others (N=814)	Includes Jinzhou, Jiangmen, Ningbo, and Foshan among others (N=489)
Average HH Income (USD): \$33.8K	Average HH Income (USD): \$19.6K	Average HH Income (USD): \$9.3K
82% music listeners	74% music listeners	53% music listeners
19 hours listening per week	17 hours listening per week	12 hours listening per week
68% listen on smartphones	67% listen on smartphones	61% listen on smartphones
29% listen on tablet	21% listen on tablet	12% listen on tablet
35% listen with specialized headphones	20% listen with specialized headphones	9% listen with specialized headphones

YAOGUN - CHINESE ROCK 'N ROLL



Serve The People! Serve The Rock!

China's Post-Cultural Revolution "Yaogun"



Exhibition, Video Screening, Speakers, Networking
location: China Institute
100 Washington St, New York, NY
Date: Tuesday, January 19
Time: 2-9 PM



Serve The People! Serve The Rock!

MUSICDISH
YAO GUN-摇滚

China's Post-Cultural Revolution "Yaogun"



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MUSICDISH*CHINA TOURS

EAGLE I STALLIAN/MONK & KEYS, MENAGE, OOBERFUSE, THE JESSICA STUART FEW



OOBERFUSE

GLOBE TROTTERS TOUR
CHINA

Beijing | Zhangjiakou | Baoding
Langfang | Nanjing | Wuxi
Ningbo | Changzhou | Shanghai

September 2016
www.ooberfuse.com



2016.10.31
加拿大传奇电音双人DJ组合
EIS·中国巡演
武汉站·万圣夜

EIS CHINA TOUR
WUHAN RAILWAY STATION NIGHT
EAGLE I STALLIAN

WARNING
时间: 2016.10.31晚
地点: 武汉市武昌区绿地金融国际商务城二号楼酒吧
早鸟票: 60元 (10月20日前)
预售票: 80元 (10月30日前)
现场票: 120元

微信: loveandpeacefest



加拿大双人摇滚乐队
MENAGE
Lost In China Tour 2016
"迷失中国"巡演

9月1日 - 大同 理想音乐节	9月11日 - 石家庄 地下丝绒
9月3日 - 张家口 天漠音乐节	9月15日 - 湖北 腾龙洞MIDI
9月4日 - 北京 Box雅痞猴子	9月16日 - 武汉 VOX汉口店
9月8日 - 天津 13Club	9月17日 - 南昌 黑铁
9月9日 - 廊坊 麒麟	9月18日 - 长沙 46
9月10日 - 保定 暗香	9月19日 - 北京 School Bar

MUSICDISH★CHINA



加拿大民谣
12月10日晚上7:00
12月11日下午4:00
MUSICDISH★CHINA

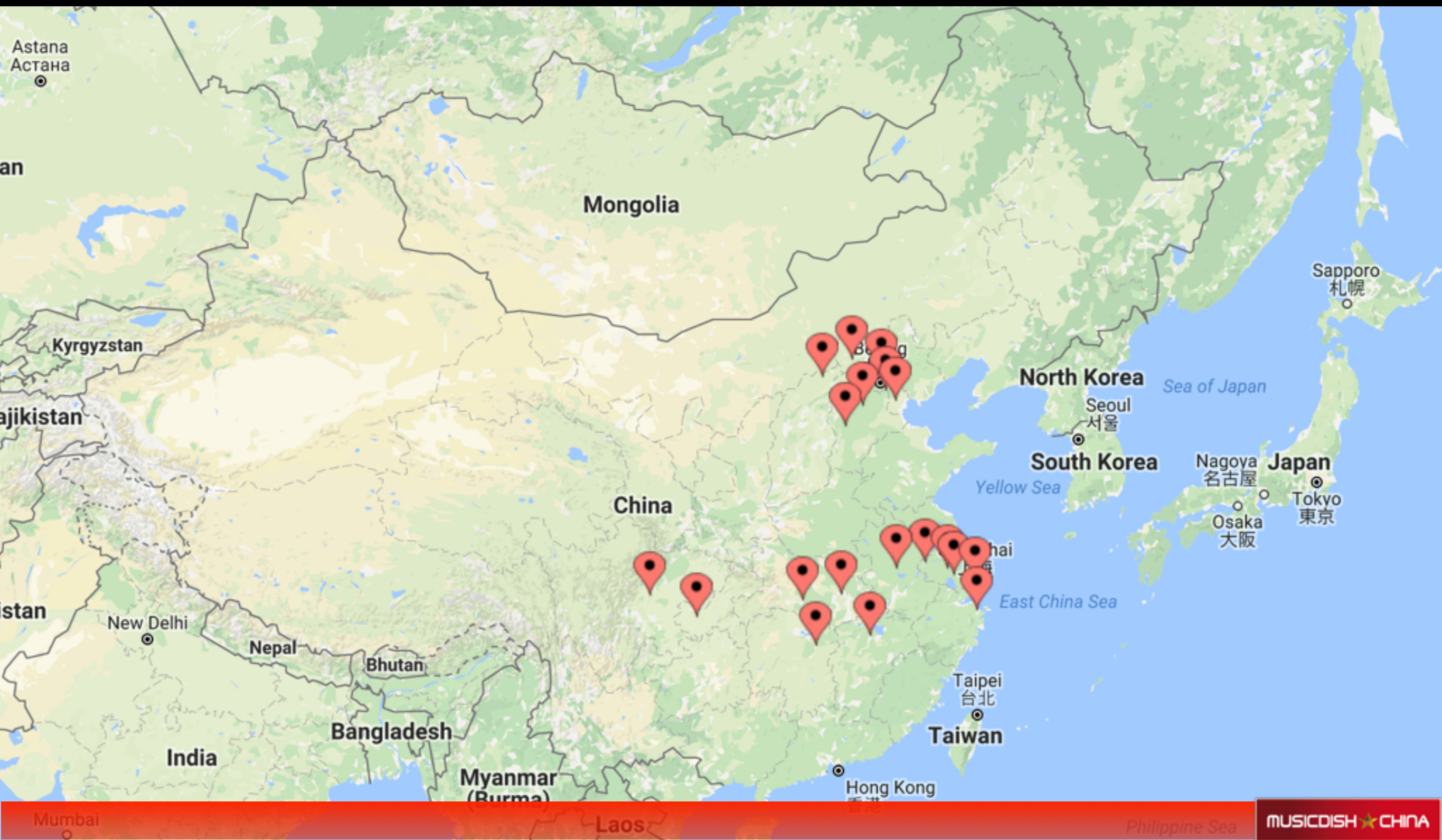
The Jessica Stuart Few

December Saturday 10th at 7pm
December Sunday 11th at 4pm

booking 卖票

44 SHOWS IN 19 CITIES

BEIJING, BAODING, CHANGSHA, CHANGZHOU, CHENGDU, CHONGQING, DATONG, HEFEI, JINGZHOU, LANGFANG, NANCHANG, NANJING, NINGBO, SHANGHAI, SHIJIAZHUANG, TIANJIN, WUHAN, WUXI, ZHANGJIAKOU



3 FESTIVALS (MTA 天漠, DREAM SONIC 理想音乐节) AND MORE

FESTIVALS & SHOWS





2016  NNDI

腾龙洞

迷笛音乐节

TENGLONG CAVE
MIDI FESTIVAL 2016

把酒邀明月
摇滚共此时

2016.9.15/16/17

13:30-22:00

湖北省利川市腾龙洞景区

咨询电话: 0718-7262455



预售单日: 150元

预售通票: 400元

现场单日: 180元

现场通票: 450元

天漠音乐节

2016 MTA FESTIVAL

9/3-4

怀来·天漠

EXAMPLE[UK] | RUDIMENTAL[UK]
ALAN WALKER[NW] | ALINA BARAZ[US]

超级市场 | 宠物同谋 | NOVA HEART

HELLO NICO[TW] | SHTUBY[IS] | GRAND WA ZOO[UK]

FLUX[TW] | 激肤[TW] | HOWIE LEE | HUZI & EDO | 蒋亮的声音系统 | CNDY | KAFE.HU

远东之狮 | MÉNAGE[CA] | OBERFUSE[UK] | BLOODZ BOI | MHP

AND MORE

音乐 · 科技 · 艺术

和你一起探索明日边界

More info: www.mta.fm Tickets: www.damai.cn 400 610 3721

2016 DATONG DREAM WORLD MUSIC ART FESTIVAL LIFE

中国大同·理想世界音乐艺术生活节



MUSICDISH CHINA

YEMA LIVE (野马现场), PANDATV, MODERN SKY NOW (正在现场)

LIVE STREAMING



HUBEI UNIVERSITY OF ECONOMICS, WUHAN INSTITUTE OF DESIGN & SCIENCES

MASTERCLASSES



ANTVR (蚁视), ONE OF THE BIGGEST VR MEDIA COMPANIES IN CHINA


VIRTUAL REALITY VIDEO

玻璃剧场 La Plantation theater


the Jessica Stuart few
加拿大民谣乐队
canadian pop fusion

12月10日晚上7:00
12月11日下午4:00

Saturday 10th of December 7.00 pm
Sunday 11th of December 4.00 pm



MUSIC CHINA



玻璃剧场
位于朝阳区麦子店乡何各庄村
北京100101
地铁15号线马泉营站出口
email: laplantationsina.com
电话: 51661201
微信: chineseliving

“最平素和地比人角新。”——Don Ross, Canadian Guitar icon
“音乐之美，温暖和善，与众不同，不同凡响。”——Rocco Music Canada
“永无止境的魅力。”——The Globe & Mail

票价: ¥150 成人/¥80 (学生/孩子)
预订: ¥200 成人/¥100 (学生/孩子)
Reservation: ¥150 / ¥80 (students/children)
At the door: ¥200 / ¥100 (students/children)

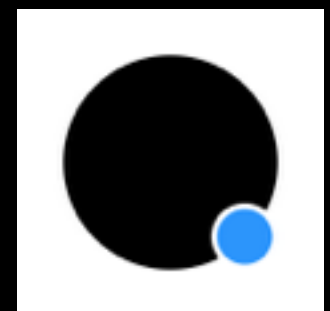
La Plantation theater
art base one in hegezhuang village
Shunbai road, Chaoyang, Beijing
Subway line 15 Maquanying station B exit
email: laplantationsina.com
Tel: 5166 1201
wechat: chineseliving



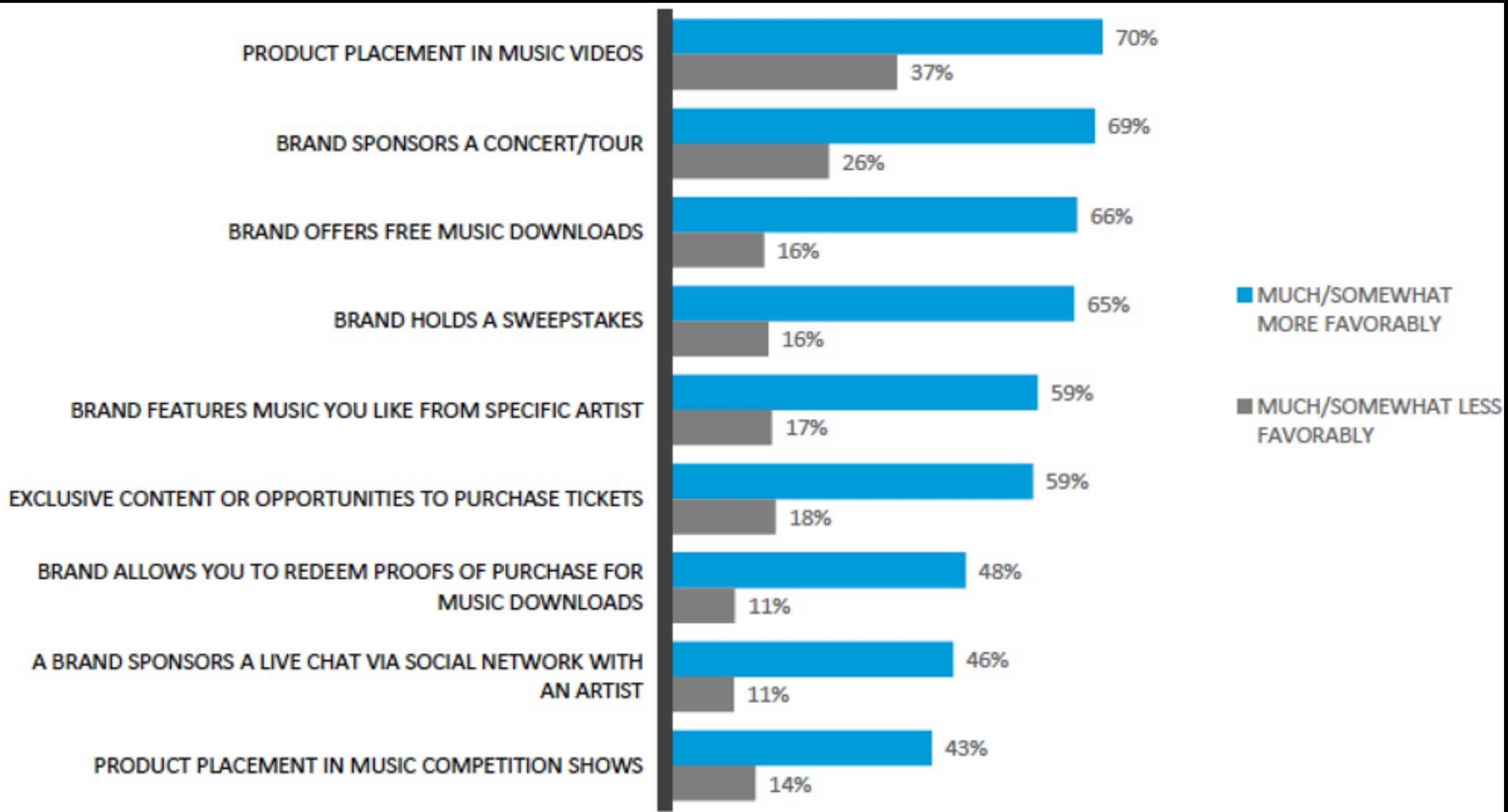
ANTVR 蚁视

MUSIC RELEASES / MEDIA / LIVE STREAMING / TICKETING / PROMOTERS

PARTNERS



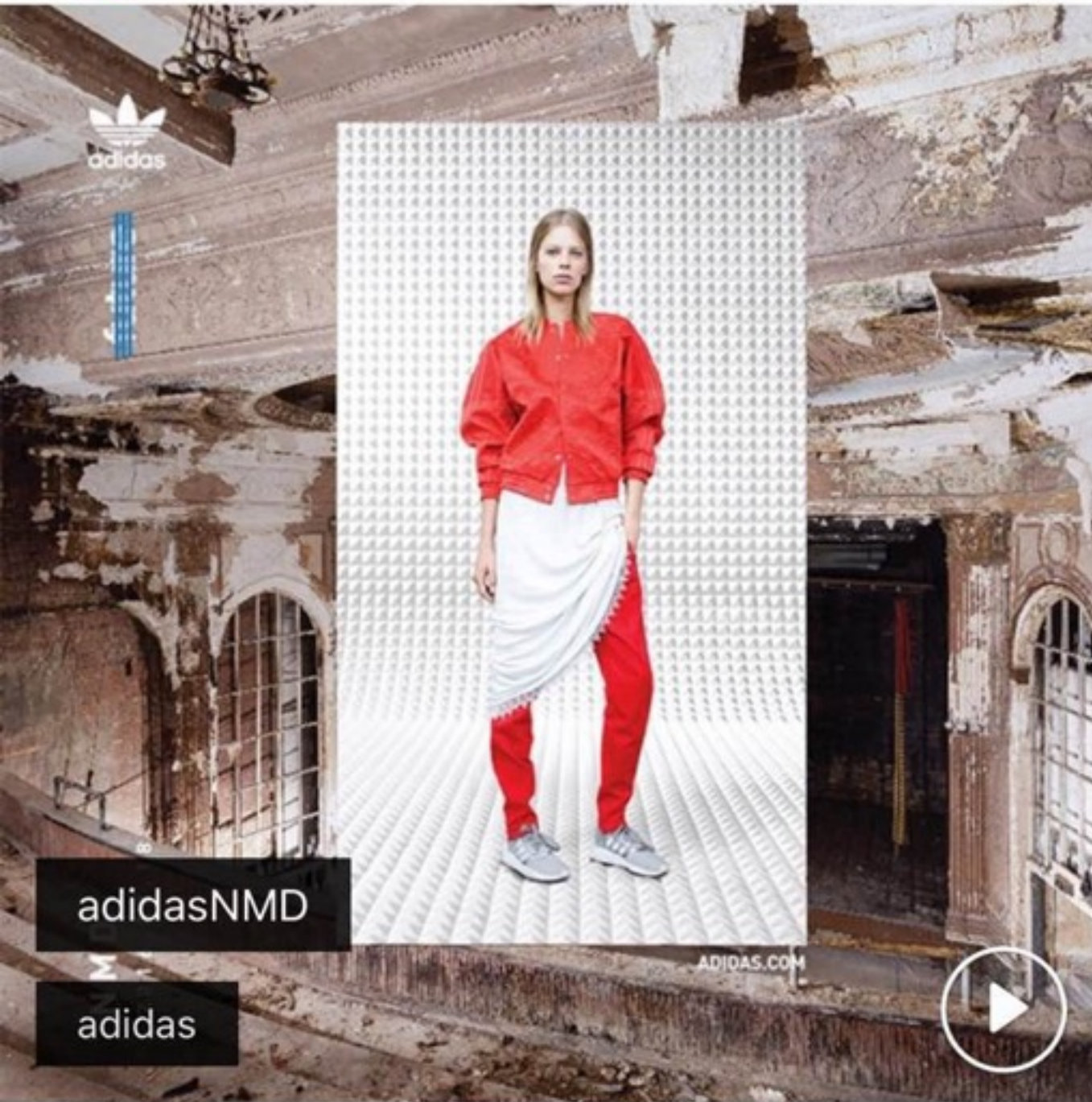
MUSIC LISTENERS & BRANDS (NIELSEN)





enjoy

🕒 12分钟前



NMD_衔接过去历史与未来创想，展开一段追溯之旅~



9



收藏



分享



老墨 (DE)、秘密行动、万重、左右、反光镜



Kelen-Sha

8分钟前

MUSICDISH CHINA

YEMA LIVE

- Online live music broadcaster + festival organizer (MTA & Zhangbei Festival)
- Original live streaming programming: "Live is Everywhere" & "Yema Indie"
- 2016: 100 shows, 5K minutes, av. 50K audience, 5M total audience (8M w/ partners)
- Audience analysis
 - 19-35, tier 1-2 cities, active net users, active social life, live music, celebrities & KOL
 - willingness to spend money and time on entertainment & alternative lifestyle choices

TUBORG BEER

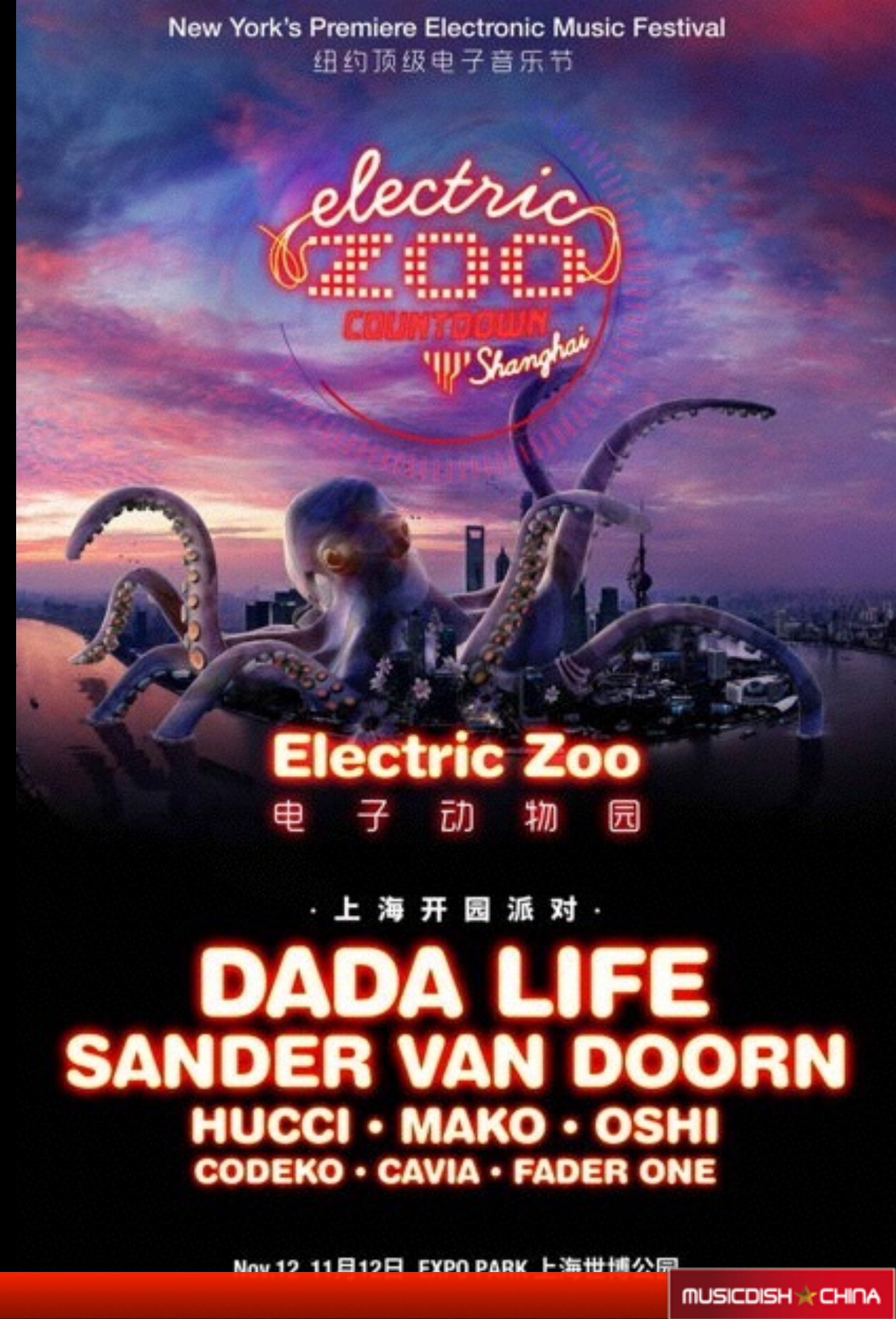
- 2012 - Brand launch in China
- 2013 - Tuborg Music Truck Tour w/ Chinese promoter Splatter
- 2013 - GreenFest 乐堡绿放音乐节
 - festivals w/ Modern Sky in 2nd/3rd tier cities with environmental focus
 - introduced "Silent Disco" and tents to China's music festivals
- 2014 - 5-year strategic partnership with Modern Sky
- 2016 - Tuborg Electronic Stage at Strawberry Festival in Yunnan

BUDWEISER STORM FESTIVAL

- Budweiser title sponsor for A2LiVE's STORM electronic festival
- 2015 - 75,000 in Shanghai and Shenzhen
- 2016 - expand 5 cities (Beijing, Shanghai, Guangzhou, Shenzhen, and Chengdu)
- 2017 - plan to expand 11 cities across China + Sydney and Taipei
- Storm Records, in partnership with Amsterdam-based Spinnin' Records
- Budweiser investing in EDM marketing
- Online reality bootcamp show for rookie DJs
- Innovative gamification as part of ticketing strategy

ELECTRIC ZOO SHANGHAI

- Made Event select Kanjian as exclusive China partner
- Highlights from New York's Electric Zoo: Wild Island
- Merch: HEDONE Nail Stickers, I-TATTOO Stickers
- 2017 - 2-day 3-stage Shanghai festival (40 DJs)
- Expanding Electric Zoo to other major cities such as Beijing, Chengdu, Guangzhou and Shenzhen





ERIC DE FONTENAY MUSICDISH*CHINA

- In 2010, Eric de Fontenay launched MusicDish*China to bridge Greater China's music sector with the world. He has coordinated Taiwan cultural missions to France, Canada and the U.S., and now represents mainland Chinese rock bands such as Second Hand Rose, Gemini and Namu. He has also been developing and touring overseas music acts in China. He has organized talks and exhibition for NYCxDDesign and China Institute, been featured in a variety of media such as China Daily and CCTV America, and was selected for Mandarin Leader's 2016 Honoree List.



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MUSICDISH*CHINA

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