

October 17, 2015

The University of Southern California

# Revenue In The Evolving Music Market

1. Live Music

2. Recordings

3. Publishing

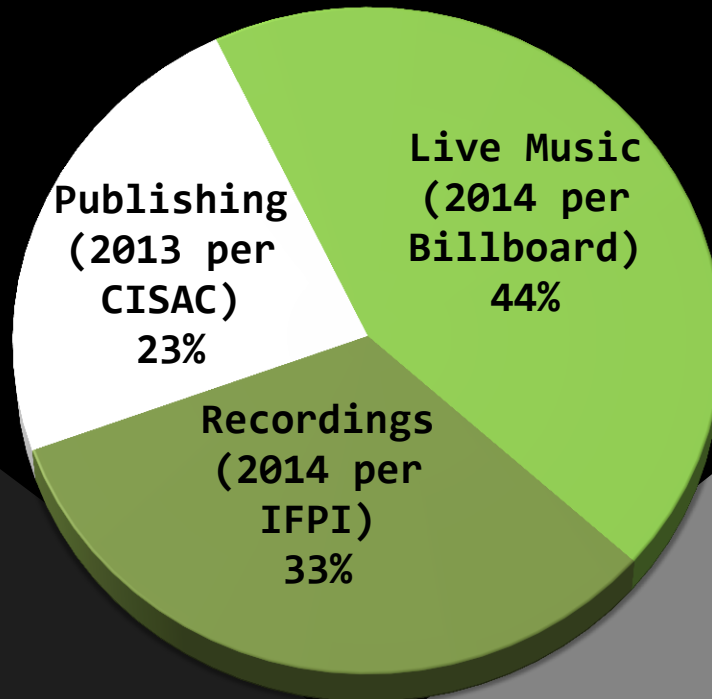


**View  
From  
The Top**

**#Revenues**



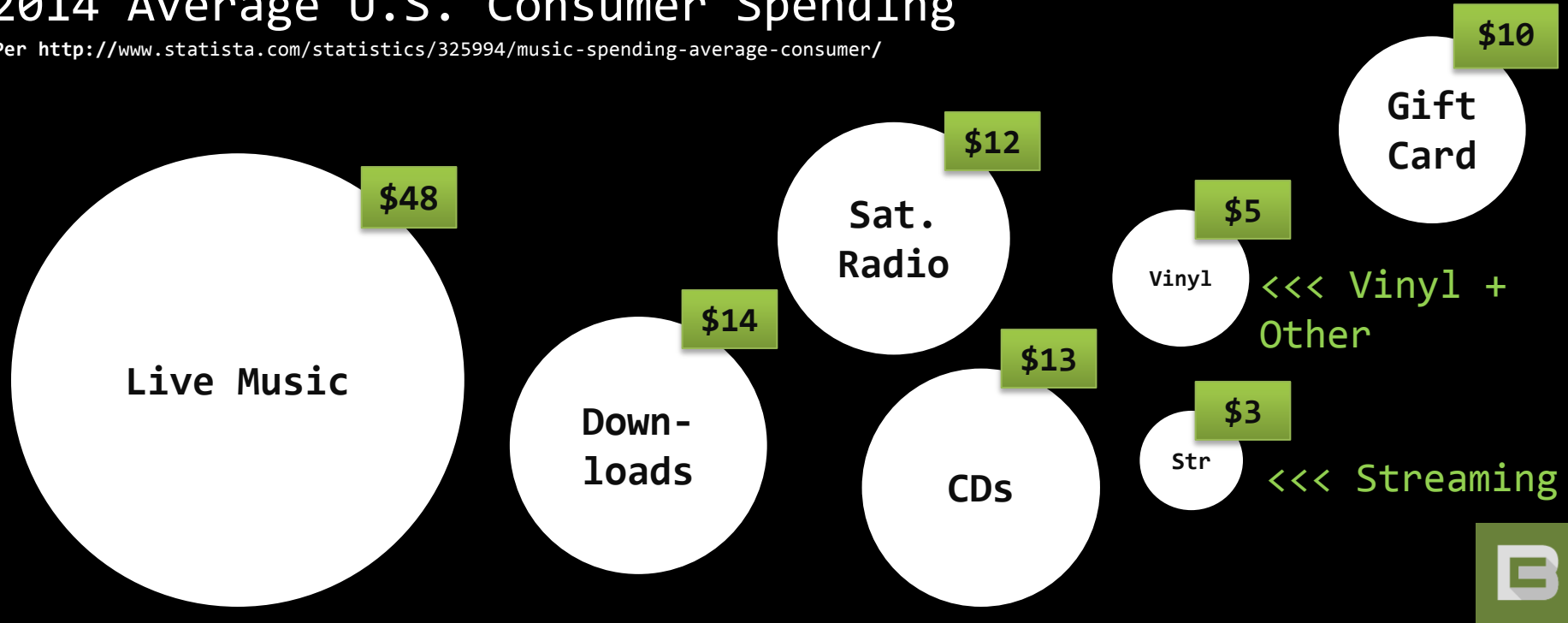
# Music Industry Revenues = \$45.66 Billion U.S.



# \$105 Per Capita

## 2014 Average U.S. Consumer Spending

Per <http://www.statista.com/statistics/325994/music-spending-average-consumer/>



# More than consumer spending

Consumer spending is only part of streaming companies' cash receipts



## Investors

Billions of dollars have been invested in companies like Pandora and Spotify



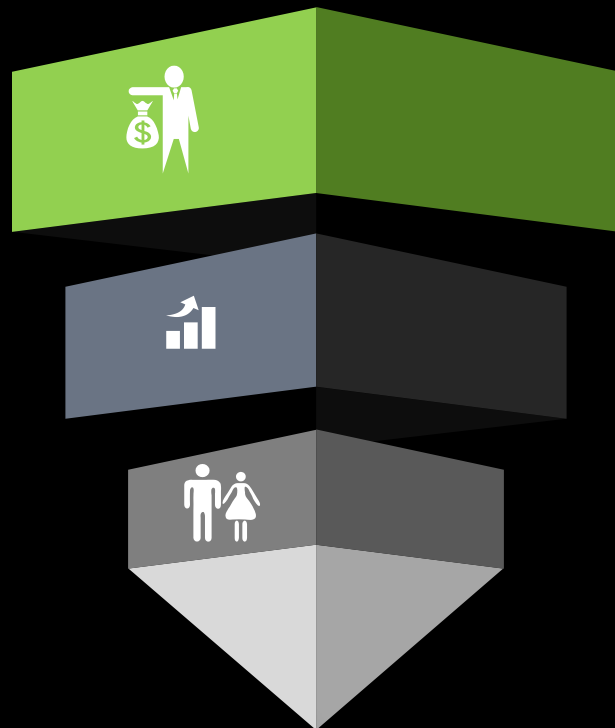
## Advertisers

Advertising is a bright spot - Spotify's Q1 ad revenue is up 53% (380% increase in mobile)



## Consumers

Spend only \$3 per year on streaming services.



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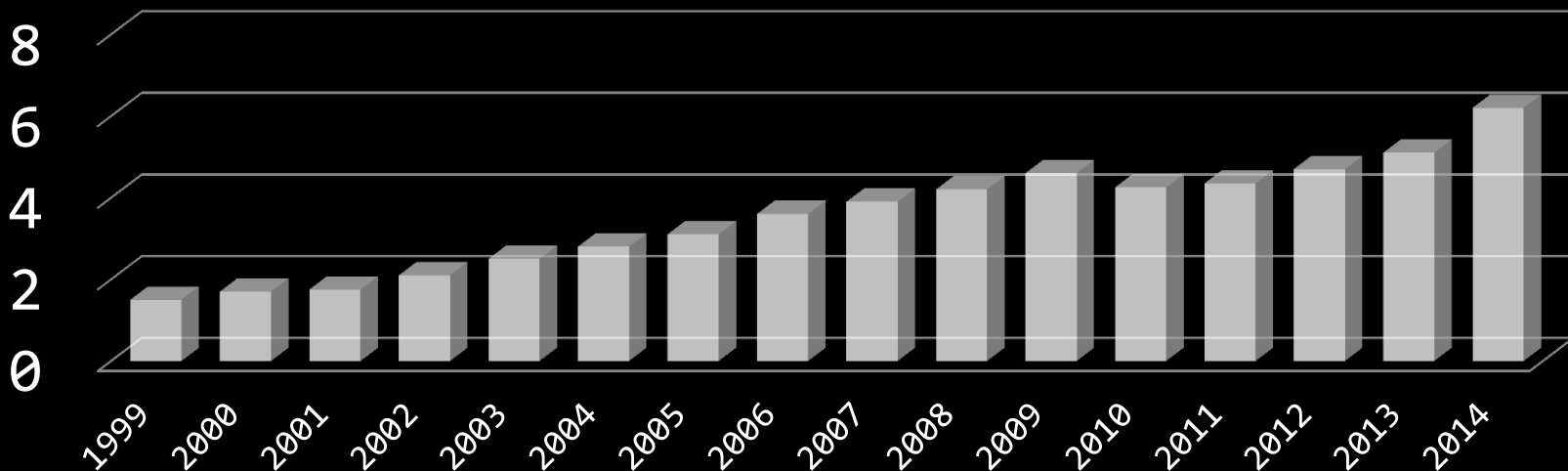
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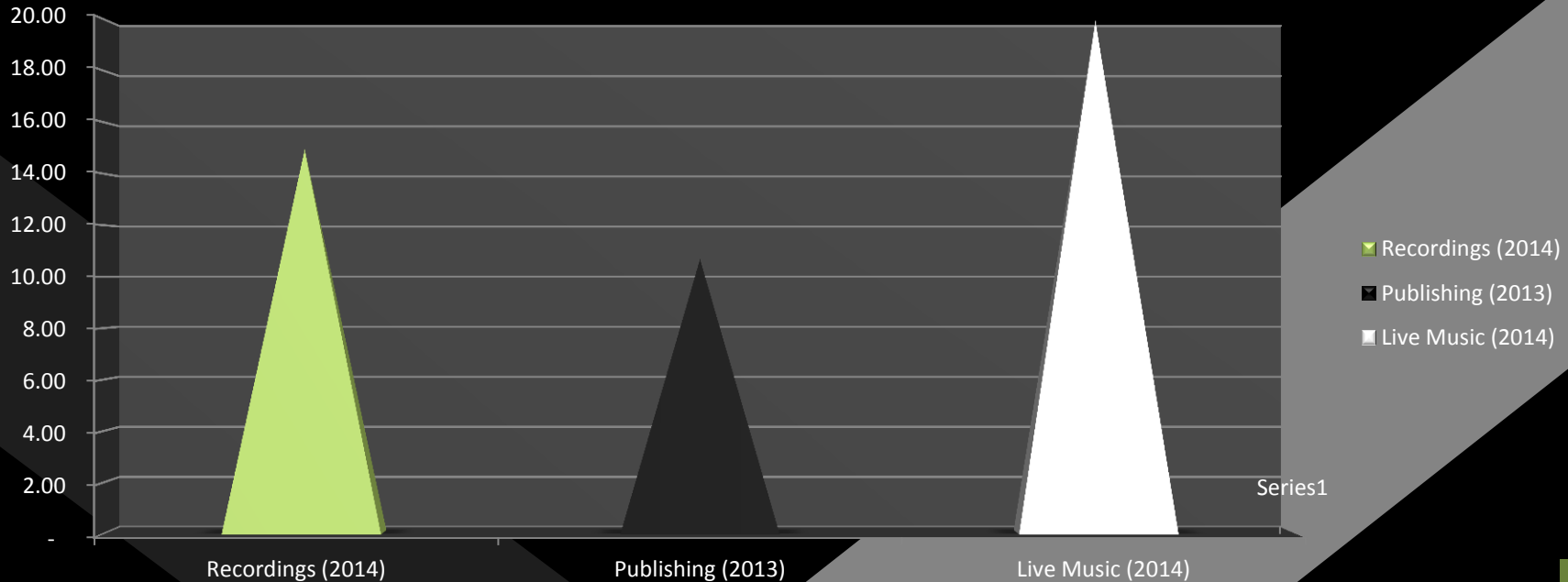


# #Tour

## North American Concert Revenues (In Billions Per Pollstar)



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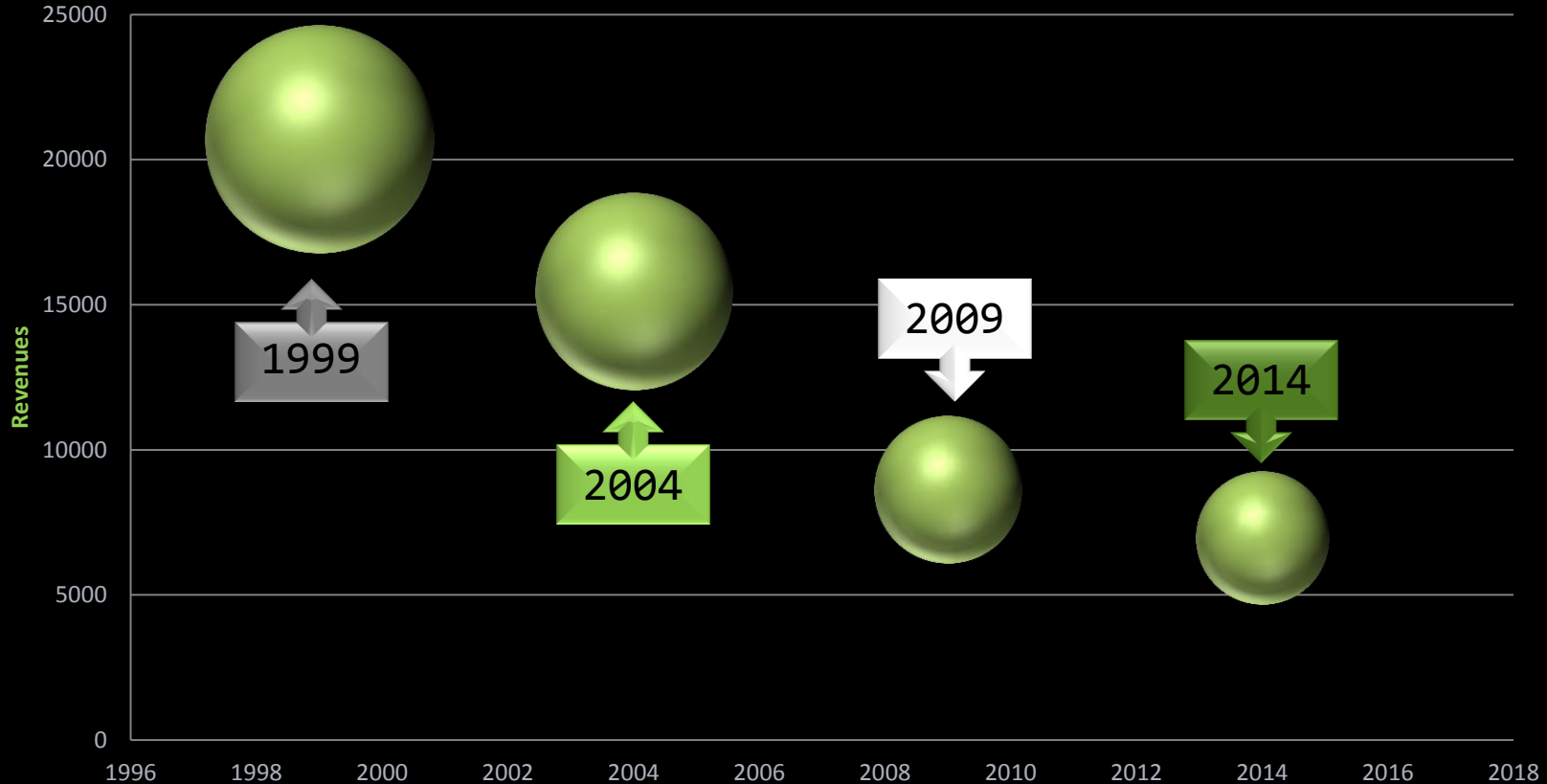
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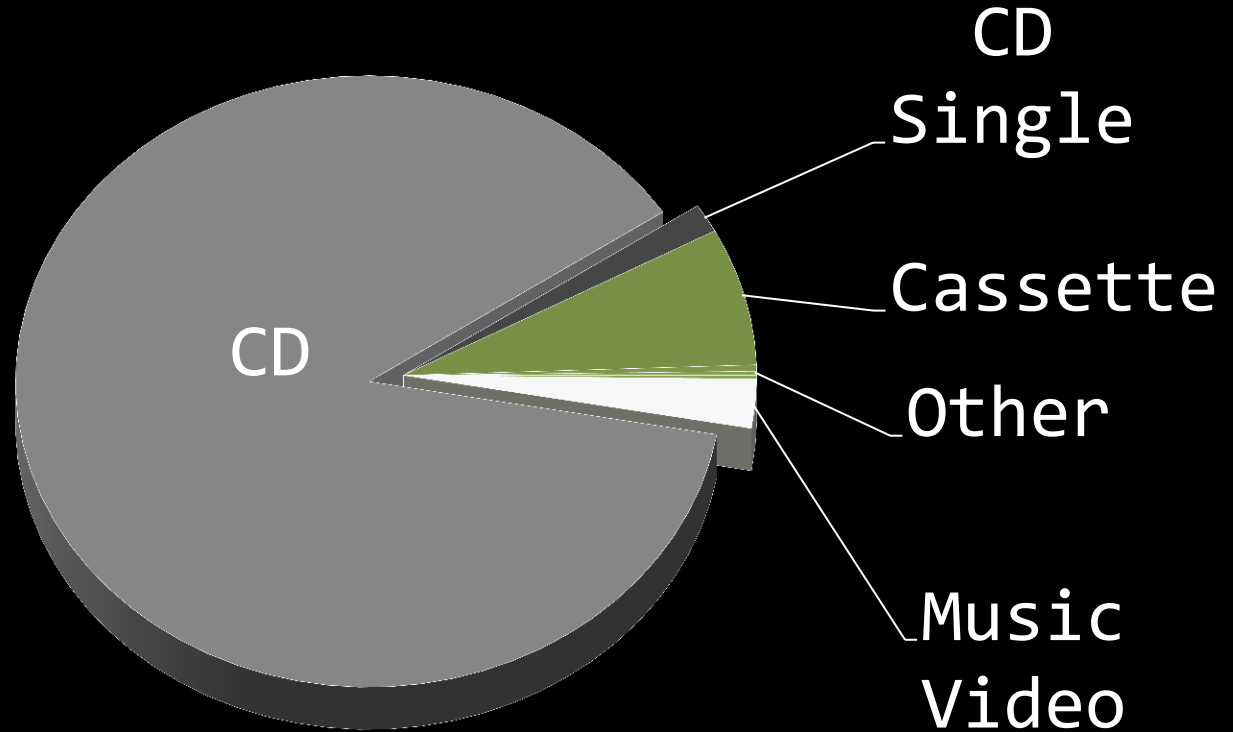
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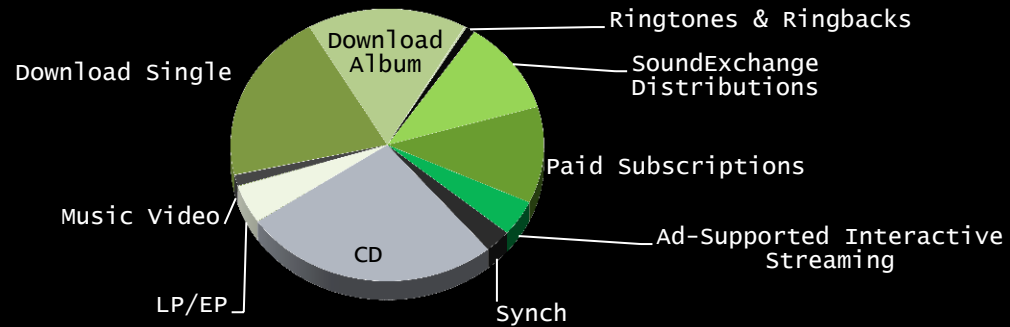
# U.S. Recorded Music Revenue Per RIAA \$20.7 to \$7 Billion



**1999 RIAA Revenues  
= \$20.7 Billion**



# 2014 RIAA Revenues = \$6.9 Billion



# = \$1 Million

U.S. Recorded Music Revenue

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1.5 Million  
Apple  
Downloads



> 500 Million  
YouTube Artist  
Channel Plays




> 200 Million  
Spotify  
Plays

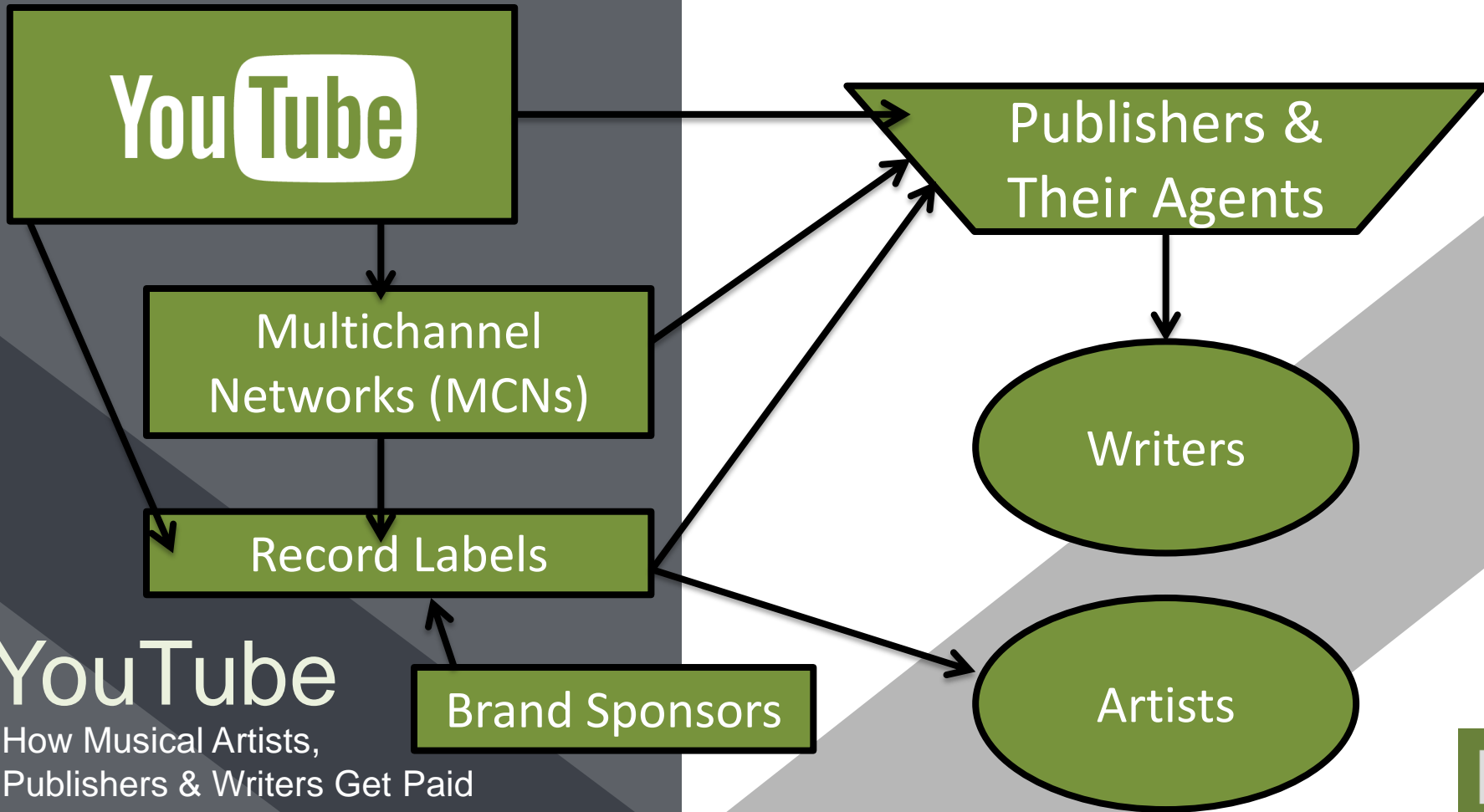


> 700 Million  
Pandora  
Plays



The background features two large, overlapping geometric shapes. On the left, a dark gray triangle points downwards towards the bottom center. On the right, a light gray triangle points upwards towards the top right corner. The text is centered in the white space between these two shapes.

“91% listen to the  
song/watch the video  
on YouTube prior to  
purchasing” per Viacom



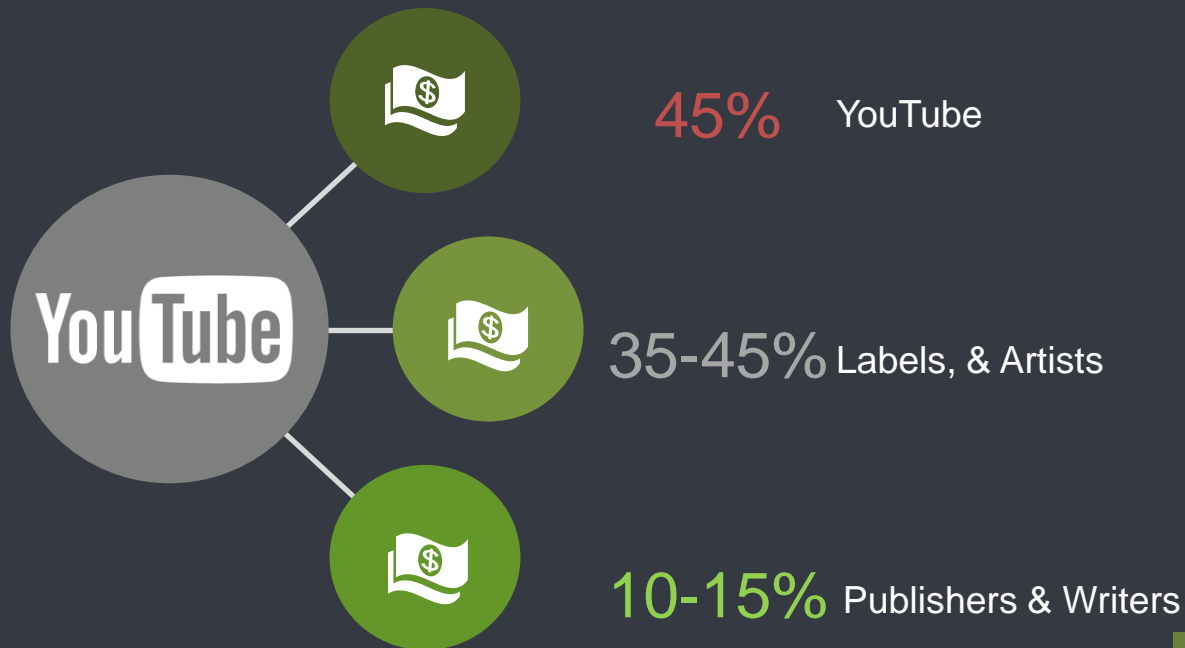
**YouTube**  
How Musical Artists,  
Publishers & Writers Get Paid



# YouTube

Below are estimated splits for user generated content on YouTube in the United States

YouTube  
Ad Revenue  
> Est. \$4  
Billion/Year





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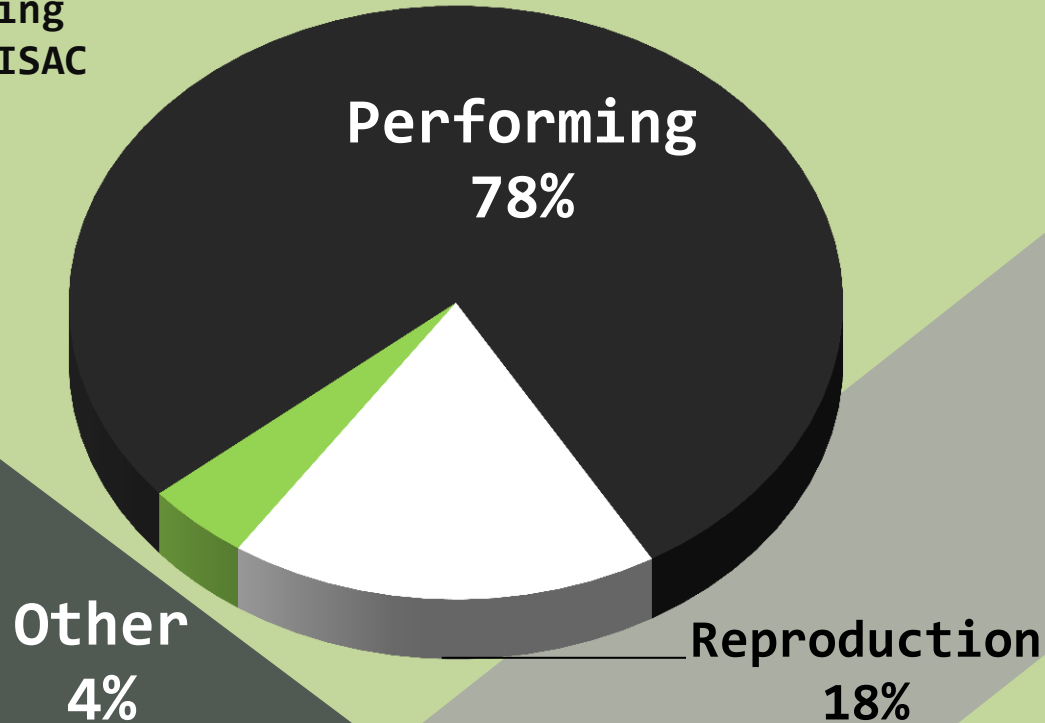
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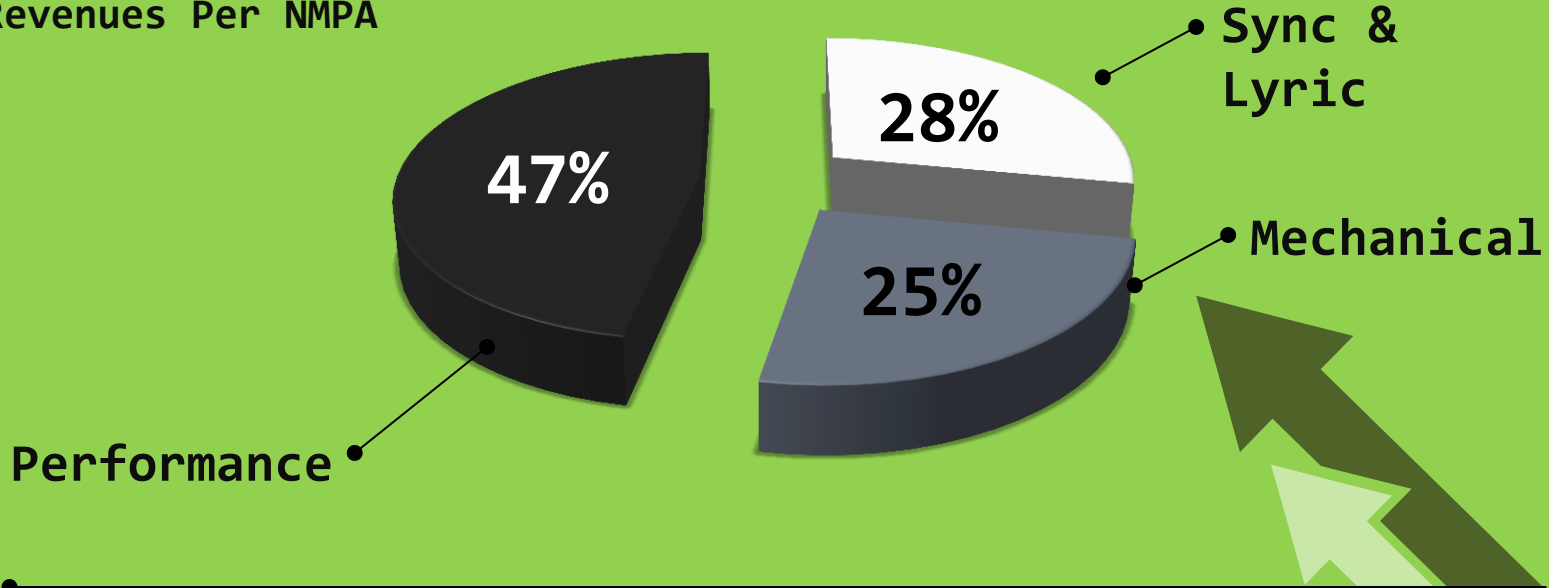
# 2013 Global Music Publishing

Est. \$10 Billion 2013  
Global Publishing  
Revenues Per CISAC



# 2013 U.S. Music Publishing

Est. \$2.88 Billion =  
2013 U.S. Publishing  
Revenues Per NMPA



# Music Industry Revenues

## = \$45.66 Billion U.S.





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