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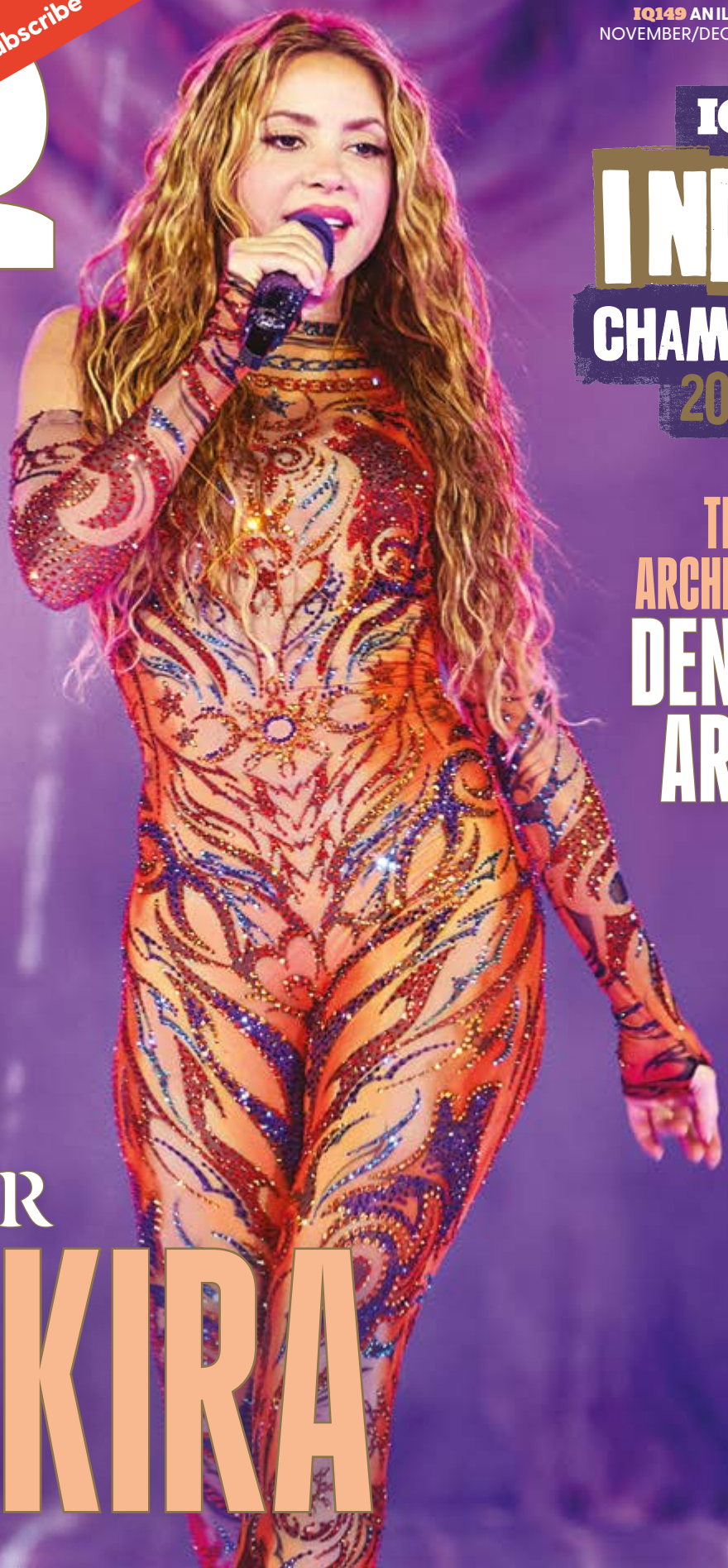

IQ INDIE CHAMPIONS 2026

MARTJE KREMERS
The incredible career of one of electronic music's best-loved agents

THE ARCHITECTS DENNIS ARFA

THE BIG IQ (P)REVIEW
Looking back at 2026 and ahead to 2027

TOUR OF THE YEAR
SHAKIRA

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IQ149 CONTENTS

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NEWS

06 **Most Read Index**
The ten most-read stories from *IQ*'s daily news coverage

08 **Analysis**
Key stories and news analysis from around the live music world

12 **New Signings & New Music**
A roundup of the latest acts that have been added to the rosters of international agencies

GLOBAL INSIGHTS

72 **Market Report: Bitterswede Symphony**
Derek Robertson discovers a live entertainment business that is sharply divided

96 **City Focus: Manila**
The Philippine capital's live music scene is seeing rising audience numbers and incredibly passionate fans. Oumar Saleh speaks to the key execs about how to avoid the pitfalls of touring here

FEATURES

18 **IQ's Big (P)review: The End-of-Year Round-up**
Key execs from across the industry look back at 2026 and forward to 2027

28 **Indie Champions**
Our annual celebration of the many independent companies making an impact on the live music industry

39 **The Architects: Dennis Arfa**
Adam Woods reports on the profound effect the live music veteran has had on the live music business we know today

60 **Tour of the Year: Shakira**
Josefina Armendariz & Florencia Mauro go behind the scenes of the record-breaking *Las Mujeres No Lloran World Tour*

80 **Bulletproof: Luger**
Derek Robertson takes an inside look at the success of one of Scandinavia's leading promoters

82 **The Nocturne: Martje Kremers**
Lisa Henderson talks to agent Martje Kremers as she clocks up 25 years in the business

90 **Spend & Deliver**
Live event spending trends courtesy of payment platforrm atVenu

92 **Stuck in the Middle**
Gordon Masson examines creative solutions to the sometimes tricky mid-tier touring sector

COMMENTS & COLUMNS

16 **Key Trends in Insurance 2026**
Tysers Live managing director Tim Thornhill looks back at the issues that shaped premiums over the last 12 months

17 **Supporting Artists on the Front Line**
In Place of War's Ruth Daniel explains how expanding the global touring map elevates new voices

100 **Q&A: Aviva Arena**
New head of programming, Dave Gaydon, on his vision for the UK's forthcoming independent arena

102 **Humble Brags 2026**
The next generation of live music industry leaders share their proudest achievements of the past 12 months



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IQ'S **BIG** (P)REVIEW

2026 WRAPPED

Words **Lisa Henderson**

If one story defined the live music business in 2026, it was its globalisation. That trend helped persuade Goldman Sachs to raise its growth forecast for the global music industry for the first time in three years. With its annual *Music in the Air* report, the US banking institution projects the industry's value will rise to nearly $200bn in the next decade, underpinned by live music's growth to $27.7bn (+5.7% CAGR). "Artists are building passionate audiences across continents, genres, and languages," surmises THE·TEAM's co-president of music, Kevin Shivers.

The most notable effect of this has been the uptick in ticket sales for non-English-speaking artists such as Bad Bunny, Rosalía, and Diljit Dosanjh. In fact, Live Nation CFO Joe Berchtold revealed in September that non-English language shows now make up 30% of Live Nation's top 50 global tours, compared to only 8% before the pandemic.

Another impact of the globalisation of live music has been cross-border music tourism. "Fans are increasingly travelling across continents and borders to see shows," notes Pernille Møller Pedersen, CEO of All Things Live. "Superfans have always travelled, but the number of tickets we have sold to fans from abroad – especially to K-pop and country – shows this year has been noticeable." In the UK, for example, music tourism swelled by more than a quarter in 2025 compared to the year before, as the country's live sector attracted a record 24.7m music tourists to concerts and festivals, a July 2026 report from UK Music found.

Naturally, residencies have played a key role in driving music tourism. The ten-date Amsterdam leg of Harry Styles' *Together, Together* world tour drew roughly 35% of attendees from abroad, while a similar percentage of ticket-buyers for Ariana Grande's ten-night residency at London's The O2 were from overseas.

While non-English language tours stole the show in 2026, the global profile of both country and electronic came on leaps and bounds. Stars such as Zach Bryan and Luke Combs brought country music to stadiums in Europe, setting records along the way. Meanwhile, electronic music stars stepped up to arena, stadium, and greenfield level. Australia, in particular, has seen notable gains. In September, Calvin Harris achieved the highest-selling electronic tour in Australian history, shifting 370,000 tickets across 11 shows, while Dom Dolla sold out a 60,000-capacity show at Melbourne's Marvel Stadium. Next year, Untitled will capitalise on this demand by launching a new electronic music festival in Perth and Brisbane called Drift.

"Electronic is hitting an all-time high on sales and moving increasingly to arena/stadium level," notes THE·TEAM's Dave Blackgrove, the agent behind Dom Dolla's homerun and Sonny Fodera's sold-out arena tour in Australia.

CHALLENGES

Rising costs were a persistent source of anxiety across the industry in 2026, with all sectors feeling the squeeze. Concert promoters, including Friendly Fire's Rense van Kessel and AEG Presents' Simon Jones, cite the tricky dichotomy of covering costs whilst keeping ticket prices reasonable and meeting fan expectations. In the festival sector, Colours of Ostrava's Pavla Slívová is attempting a similar balancing act: "The ever-increasing costs of booking artists, especially headliners, while trying to maintain a diverse and exciting programme within a sustainable festival budget." And it's no different for venues – nor fans – as Global Legends' Gary Simpson points out: "We're not immune to the impact of energy prices and the cost of running big venues, and fans are feeling the cost of living, too."

Indeed, as many promoters in the *Global Promoters Report 2026* note, fans have become increasingly selective about which concerts they spend money on. Untitled Group's Nicholas Greco points out the outsized impact on one particular area of the business. "Fans will find the money for the non-negotiable shows, but a mid-tier artist is now competing with the grocery bill," he explains. "Our challenge has been keeping that tier exciting and still growing it, with an audience that's far more careful about what it spends. It matters because that's where tomorrow's headliners come from."

Extreme weather has, and will continue to be, a serious challenge for outdoor events, particularly for those in Western Europe. Klaus-Peter Schulenberg, CEO of CTS Eventim, which had to cut short Garorock Festival in France because of storms and heat-related weather, tells *IQ*: "Alongside wind and thunderstorms, high temperatures now demand much more attention in event planning. The industry has adapted to difficult conditions before, and we will of course navigate this one, too."

BEST LIVE ACT OF 2026

ANGINE DE POITRINE
Justin Sweeting, Magnetic Asia

MADRA SALACH
Pavla Slívová, Colours of Ostrava

THE CURE
Annabella Coldrick, MMF

LIZZY MCALPINE
Simon Jones, AEG Presents

RAYE
Jana Posth, PRK DreamHaus

JAY-Z
Tony Goldring, CAA

CELINE DION
Pernille Møller Pedersen, All Things Live

SKRILLEX B2B FOUR TET
Nicholas Greco, Untitled Group

GEESE
Kevin Shivers, THE·TEAM

SELF ESTEEM
Lucy Noble, AEG Presents

LINKIN PARK
Klaus-Peter Schulenberg, CTS Eventim

THE CINEMATIC ORCHESTRA
Steve Hogan, WME

THE XX
Dave Blackgrove, THE·TEAM

CELINE DION
Kirk Sommer, WME

GORILLAZ
Rense van Kessel, Friendly Fire

RILO KILEY
Josh Javor, WME

TOM A SMITH
Mark Davyd, Music Venue Trust

INTERVIEW



ALEX MAHON

CEO, SUPERSTRUCT

How would you summarise 2026 for Superstruct?
A year of transformation. It's my first full year as CEO, and we've been building a Superstruct that gives founders and festival owners proper backing and the freedom to stay creatively independent. That is more important than ever in these times.

What was the most challenging aspect of business in 2026?
Putting on a show has never been more expensive. There is more competition for fewer available artists, and fees are rising. The easy thing is to pass every increase straight on to the ticket. We work hard not to.

What has surprised you most about the festival business in your first full year as CEO?
I came from TV, so I expected the energy. But the creativity has blown me away.

Which trend defined the festival sector in 2026?
The search for real connection. People are more connected than ever and lonelier than ever. Some 40% of our festival-goers say what defines our events is the community and atmosphere. Only around one in ten comes mainly for the headliner.

Gen Z is a clear focus for Superstruct. How will you continue to evolve the offering for them?
They're not short of content to consume; they're short of time with each other. It's about discovery, and moments you want to be in rather than film.

Where is Superstruct using AI, and where won't it?
We're not in favour of dynamic pricing. What someone pays for a ticket should be clear and transparent, not decided by an algorithm in the moment. Where AI can help is behind the scenes – things like timetables and summarising thousands of lines of data, so our teams can spend more time on what matters. It will never make the creative call. As AI floods the world with infinite, frictionless content, the specific, the original, and the unrepeatable only rise in value. That's what we do.

What's the biggest threat to festivals right now, and how are you safeguarding against it?
Cost is the slow threat. Polarisation is the fast one. Boycotts by association only empty stages and hurt crews, suppliers, and artists. Our answer is to put our principles in the open. The Artistic Code means no censorship of artists just because their views are controversial and zero tolerance fo
discrimination or anything that puts people at risk.

What are your top priorities for Superstruct in 2027?
Audiences first, backing our most creative people, and b
partner in live.

How big will 2027 be for the festival sector compar
2027 will be strong for festivals that know ex
more difficult for those that are just a lineup

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IQ INDIE CHAMPIONS 2026

THE THIRD ANNUAL COHORT OF IQ MAGAZINE'S INDIE CHAMPIONS HAS ARRIVED. ONCE AGAIN, WE'RE CELEBRATING 20 PIONEERING COMPANIES, NOMINATED BY IQ READERS, THAT ARE CARVING THEIR OWN PATH IN THE LIVE ENTERTAINMENT INDUSTRY. WITHOUT FURTHER ADO...

ANOTHER PLANET ENTERTAINMENT

CEO Gregg Perloff | **HQ** Berkeley, California | **Founded** 2003

Another Planet Entertainment (APE) is the largest independent promoter in the US. It promotes and produces concerts and operates an artist management arm and a private events division.

Top 2026 highlight?

This year's Outside Lands. This was our 18th edition, and I dare say it may have been the best one yet. All the performances were top-notch. It was the fastest sellout we've ever had.

What does "independent" mean to your company in practice?

It means not having to make financial projections, not answering to anyone, and being able to move quickly on ideas without a lot of red tape.

What is the biggest challenge your company has faced in recent years?

Skyrocketing costs and the massive consolidation of the touring business.

How does being independent influence the culture you create in the company?

Our company has a family feel and not a big corporate structure. The people who work for our company have an independent spirit, love working shows and being hands-on in many aspects of the business.

What advice would you give to someone starting an independent company today?

Go outside into your driveway, put $100k in cash on the ground, put lighter fluid on the pile, and set it on fire. If you don't stamp it out, then you have the mettle to start an independent promotion company.

What one thing would you change about the live music industry?

I would ask that more managers and agents respect the local markets, since for many acts a one-size-fits-all approach does not work.

BANGALORE OPEN AIR

CEO Salman U. Syed | **Core team** 3 | **HQ** Bangalore, Karnataka

Inspired by Wacken Open Air, Bangalore Open Air [BOA] brings international and Indian heavy metal bands together for a one-day festival.

What does "independent" mean to your company in practice?

Being able to back heavy metal in a market that often considers it too niche to take seriously. We still have to make the numbers work, but we can build around a community we believe in.

What is the biggest challenge your company has faced in recent years?

Making a specialist international festival financially sustainable in a price-sensitive market. Artist fees, flights, visas, and production create substantial costs, while there is a limit to what our audience can afford to pay.

What are you most proud of as an independent company?

That fans plan their travel around BOA, friends reunite there, and people get to see bands they once thought they would never see in India. I am also proud that Indian artists share the bill with international acts.

What advice would you give to someone starting an independent company today?

Understand your audience and your cash flow equally well. Loving music gives you a reason to start, but you also need to understand contracts, costs, ticket sales, and what happens when something goes wrong. Start at a scale you can deliver properly. Build trust with artists, suppliers, and audiences, and be honest about what you can afford.

What one thing would you change about the live music industry?

More international touring decisions to consider the long-term development of markets like India. There are committed audiences here, but building a regular touring market requires collaboration.

BeatHub ENTERTAINMENT

CEO Eduardo Olea | **Core team** 490 | **HQ** Bogotá | **Founded** 2026

Colombia's leading live entertainment ecosystem, connecting ticketing, venues, concert promotion, production, and F&B operations.

Top 2026 highlight?

We launched BeatHub Entertainment, Colombia's first live entertainment ecosystem; we announced Davivienda as the official naming partner of DAVIarena, our second major infrastructure investment; we acquired the remaining 50% of the operation of Movistar Arena Bogotá, giving BeatHub 100% operational control of Colombia's two leading arenas; and we opened DAVIarena.

What is the biggest challenge your company has faced in recent years, and how have you overcome it?

Evolving alongside the expectations of audiences and the demands of a rapidly changing global market. We see this as a responsibility built around professionalising the industry and creating more opportunities for local talent and businesses; elevating live experiences through investment in tech, data, and infrastructure; and building venues and moments that position Colombia as a destination for world-class entertainment.

What one thing would you change about the live music industry?

We would accelerate the professionalisation and formalisation of the industry. Live entertainment has enormous cultural and economic potential, but unlocking that potential requires stronger standards across the entire value chain. We believe the industry can innovate, measure the impact, know the audiences, and be more efficient and sustainable without losing the creativity and emotion that make live entertainment unique.

EB PRODUCCIONES

CEO Eduardo Basagaña | **Established** 2013 | **HQ** Buenos Aires

A boutique entertainment company designed around a comprehensive, 360° ecosystem model and known for bringing Latin music to markets such as Africa and Asia. EB Producciones also specialises in high-grossing niches and the international expansion of Spanish-language music.

Top 2026 highlight?

Being selected for Harvard Business School's BEMS Program; being named as an international consultant for Japanese music expansion; and being chosen by the Latin Grammys to support the growth of Latin music. And all of this has been achieved from a boutique, indie company, showing that you can have a small structure and still become global.

What's your company's unique selling point?

Our expertise in niches with high-grossing value allows us to connect artists with audiences that others may overlook.

What's the biggest challenge you faced, and how did you overcome it?

Industry consolidation by only two or three players worldwide has increased pressure on independent companies. We have responded by focusing on high-value niches where dedicated audiences create substantial commercial opportunities beyond the mainstream.

What are you most proud of?

We are proud to have contributed to the international [illegible] Spanish-language music.

What advice would you give someone starting an [illegible] company today?

Don't try to compete with major companies [illegible] derserved markets, build strong relations[illegible]

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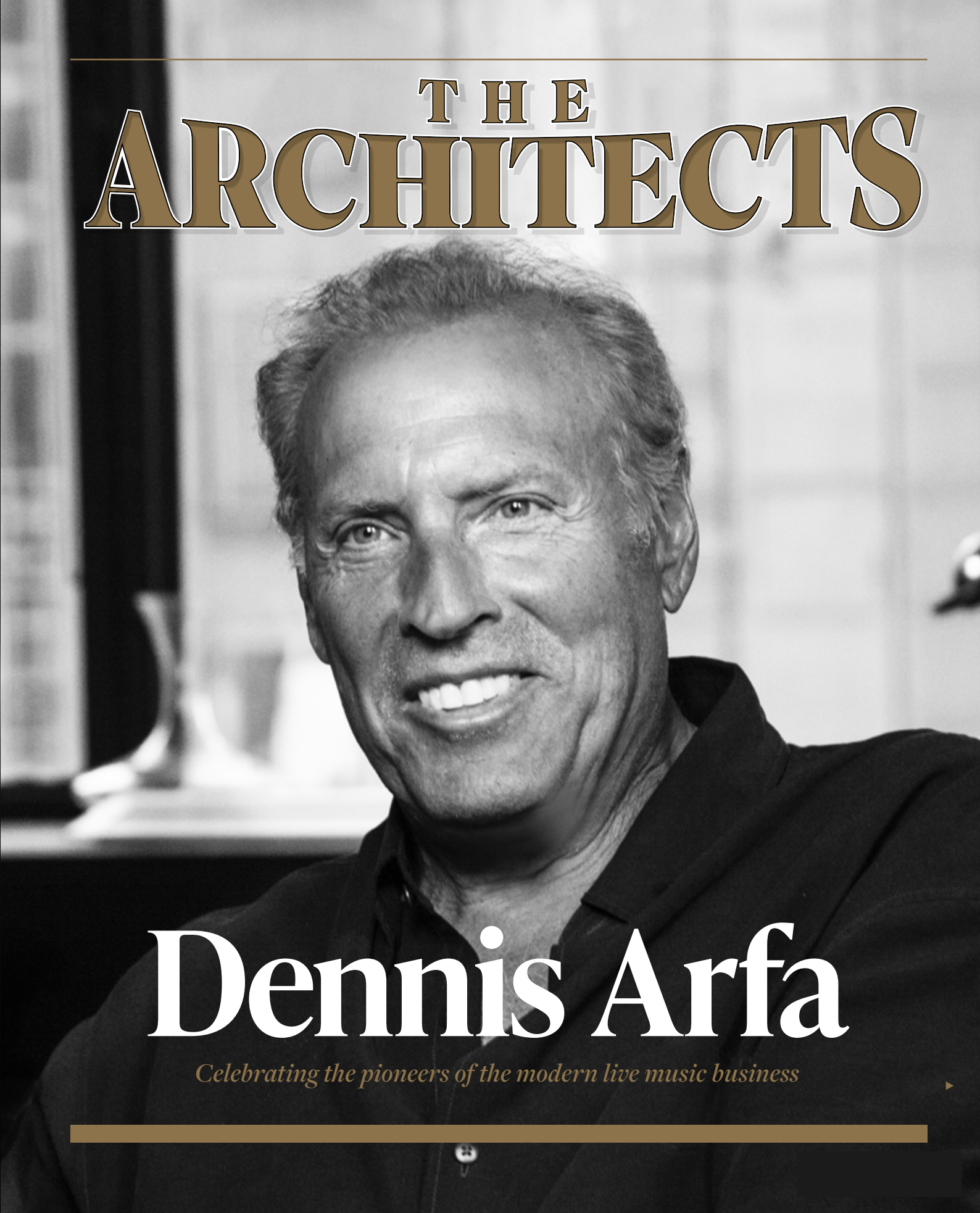

THE ARCHITECTS

Dennis Arfa

Celebrating the pioneers of the modern live music business

Dennis Arfa's Independent Artist Group represents acts from Billy Joel to Metallica, making it one of the foremost agencies in the world. But the veteran's impact on the creation of the live music business we know today goes way beyond that, as **Adam Woods** discovers.

In 1999, veteran New York agent Dennis Arfa's QBQ Entertainment became the first and only agency to be absorbed by Robert FX Sillerman's SFX Entertainment. Shortly afterwards, Sillerman wanted a bit of advice.

"I was part of an inner circle," Arfa recalls. "I wasn't the *inner* inner circle, but I was part of Bob's inner circle. He said to me that he wanted to grow international, and he needed guidance on how to do it."

Arfa's recommendation was to enter Europe through a handful of shrewd purchases. "I told Bob, 'Let's go get Leon Ramakers from Holland and Thomas Johansson from Sweden.' I said, 'They're not the biggest countries, but if you get them, everyone will come, because those guys have credibility.'"

Ramakers and Johansson, among others, were invited to Midtown Manhattan in the autumn of 1999. "We'd have breakfast at the Four Seasons, then go over and see Bob. Bob would sit there, talk to them for half an hour, and then he'd pop the question: 'I want to buy you.'

"At first, I was like, 'This is like out of a TV show.' And then I did it so often that I'd sit in the meeting and go, 'Okay, Bob, just pop the question already.' But it was amazing to be part of that. I was the conduit to bringing in a lot of the Live Nation people that exist today. It started with me."

Johansson, a close associate since the mid-70s, and now Live Nation's chairman of International and Nordics, corroborates Arfa's contribution. "He knew that ours were small but significant markets for live music, and he played an important role in pointing Sillerman in our direction," he says. "After that, doing the deal was very simple – boom boom boom."

That exposure to big-time ambition left a deep impression on Arfa. In the following decades, he has continued to build on his own terms, most recently growing the Independent Artist Group (IAG) into a major force in live music.

Today, with heavyweight backing of its own from Ron Burkle's private equity firm, The Yucaipa Companies, IAG's roster spans generations and genres – from longstanding clients such as Billy Joel, Metallica, and Rod Stewart to newer



With IAG colleagues Kyle Carter, Adam Kanter, Jarred Arfa, and Kyle Loftus

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IQ
TOUR OF THE YEAR
SHAK



Shakira's landmark Madrid residency @ Chris Cornejo

I R A

By Josefina Armendariz & Florencia Mauro

When *Las Mujeres Ya No Lloran World Tour* hit the road in February 2025, few could have predicted where it would end up. According to Live Nation, the tour sold more than 4m tickets and reported over $534m in box office revenues, making it the highest-grossing tour ever by a Spanish-speaking artist. In January 2026, Guinness World Records certified it as the highest-grossing tour of all time by a Latin artist, overtaking Luis Miguel's *2023–2024 Tour*.

Along the way, it played 32 shows in Mexico, a further 31 across eight South American countries, and 13 sold-out nights in a bespoke stadium built from scratch in Madrid. It also drew some 2m people to a free concert on Copacabana beach.

"From the beginning of the *Las Mujeres Ya No Lloran* tour, our conversations centred on doing something truly ambitious," says Colin Lewis, global tour promoter at Live Nation. "We knew the potential was enormous, but the response surpassed even our highest expectations."

Anthology

Lewis tells *IQ* that Live Nation's relationship with Shakira "goes back decades."

"Shakira is one of those rare artists who transcends language, geography, and generations. She doesn't fit into one box or mould," he says. "We saw an extraordinary opportunity to create a tour that reflected both her incredible career and catalogue and the cultural moment she was experiencing."

From the outset, the tour was approached as "a true global partnership, with one cohesive strategy across touring, marketing, production, and local execution," he adds.

Shakira's manager, Nadine Eliya, tells *IQ* that planning began in spring 2024 around the album launch. "[Shakira] knew thatshe wanted this to be her most ambitious creative proposal yet – the most robust setlist, lots of costume changes, a journey through different female archetypes an how they fit into her narrative, and new and dated choreography, while still preserv classics," she says. "We spent months i sical arrangements, sonics, and cho

The scale was clear from th when we put the first US run mand was massive – it had she had last toured. A was stadiums," says ed to meet the d as she concei

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BITTERSWEDE SYMPHONY

The Swedish market is very much a tale of two halves – at the top level, tickets are selling faster than ever, yet smaller-capacity shows are struggling. But there are many innovative solutions to this globally recognised issue. **Derek Robertson** reports.



Selling as many as 90,000 concert tickets a year ought to be good for business. Yet for some of Sweden's smaller music venues, such as Gothenburg's Pustervik, it might not be enough to keep the doors open. Despite strong demand, the celebrated 900-capacity club has been struggling to make ends meet, with rising operating costs and declining bar revenues threatening its future. Earlier this year, the city stepped in with SEK50,000 in emergency support. "So, apart from the financial results, you could say we're doing brilliantly," remarks Daniel Levin, Pustervik's managing director, wryly.

It's illustrative of just how in Sweden – as in many markets – the live music business is defined by contradiction: while the top end celebrates success after success, operators further down the ladder face a fight just to stay open. Examples of the former include Håkan Hellström shifting more than 210,000 tickets across three sold-out Ullevi concerts in 2025, and reunited rock favourites Kent drawing around 240,000 fans to six Stockholm arena shows. This summer, Bad Bunny and The Weeknd helped attract an estimated 195,000 visitors from more than 100 countries to the capital, according to Live Nation Sweden. And the appetite for such events shows little sign of waning: All Things Live reports that Swedish metal giants Sabaton have already



Sweden Rock's 2027 advance tickets sold out before any lineup announcements
© Anders Walther

sold out 16 dates of a 21-show 2027 domestic arena tour, with the remaining five expected to do the same this side of Christmas.

"The big stuff has never been bigger," says Joel Borg of independent promoter Rush Ent., which co-promoted Hellström's Ullevi run with FKP Scorpio. But the contrast with other parts of the market is stark. "Shows without a clear story in the 500–2,000 range carry most of the risk right now," he adds. All Things Live head promoter David Maloney paints much the same picture, reporting exceptional stadium and major arena business but weaker sales for club shows and smaller productions.

Yet even the industry's biggest successes aren't necessarily translating into healthy profits. Artist fees, production, staffing, and security costs have climbed sharply, and there is only so much promoters can pass on to ticket-buyers. Way Out West sold out every ticket category in 2026, drawing a record 81,500 visitors, but festival manager Kimmie Winroth admits that "the margins are basically non-existent now." It's a reminder that the financial squeeze isn't confined to smaller operators. Pelle Andersson, executive director of industry association Svensk Live, cautions against dividing the business too neatly into winners and losers: "The challenges we face are more similar than people might assume."

There are exceptions at the smaller-capacity end, too. Mejeriet in Lund expects ticket sales to rise by around 30% for 2026, helped by strong demand for rock, metal, and punk, while Luger's Daniel Bzdusek sees signs of renewed momentum among independent venues and festivals. Yet unfamiliar touring acts and weeknight shows are proving hard to sell at Gothenburg's Oceanen, while Pustervik has largely stopped presenting local bills that once drew 400 or 500 people. "There simply isn't enough interest, which makes the costs too high," says Levin.

Part of the explanation may lie in what people consider worth paying to see. Sweden Rock sold out tickets for 2027 before announcing a single band; Way Out West enjoys similar loyalty. Established artists and festivals can make an evening feel unmissable, but for promoters building an audience from scratch, the calculation is rather different. And across Sweden, the question is increasingly not whether people want live music, but which shows they'll support – and whether those shows can make money.



NATIONAL PROMOTERS

When Joel Borg and Niklas Lundell left FKP Scorpio to establish Rush Ent., in late 2024, they were giving up the backing of an established international promoter whose Swedish business spans club and arena tours, as well as festivals such as Stockholm's Broken Summer. In return, they say they now have the freedom to make decisions on their own terms. "The best part is the speed [of decision-making]: when an agent calls, we can give an answer in the same conversation," says Borg. Independence has its limitations, however, particularly when competing for larger tours. "The big [promoter] groups can offer several countries in one deal, and that's a real advantage," he admits.

For Live Nation, those international connections are helping cement Stockholm's position as a destination for concertgoers from across Europe. "For Bad Bunny and The Weeknd, Sweden hosted the majority of their Nordic shows – and in Bad Bunny's case, Sweden was the only Nordic destination," says Live Nation Sweden managing director Jon Bergsjö. A study commissioned by the promoter and its partners estimates the acts' combined five Stockholm concerts generated SEK1.18bn in direct tourism-related spending. Live Nation also reported more than 60 concerts and over 300,000 tickets sold in Stockholm during the summer.

As more artists concentrate their tours in fewer cities, often playing several nights in each, Bergsjö sees further opportunities. "We also see great potential in residencies, and our ambition is to bring more of them to Sweden," he says, citing Swedish House Mafia's four Ullevi shows scheduled for July 2027. But he acknowledges that such demand is not always replicated at other levels. "The middle of the market, with arenas and clubs, has been somewhat more uneven this year, which is to be expected when audiences have so much to choose from," he adds.

> **"Shows without a clear story in the 500–2,000 range carry most of the risk right now"**
>
> **Joel Borg | Rush Ent.**

Not everyone sees Sweden's growing prominence as a new development. As Luger's Bzdusek points out, "Sweden has been a priority market for international touring for a long time, and I wouldn't say that has changed dramatically in recent years." The problem, he suggests, is that too few tours reach cities beyond the major centres. Nor is regional demand necessarily lacking. Maloney points to Sabaton's forthcoming arena tour, which visits places that have never hosted an act of comparable scale; at some stops, he says, "we're selling more tickets than the population of the city." And Bergsjö agrees: "Stockholm is still the largest market, but the stronger Sweden becomes as a concert destination overall, the more all of our major cities benefit."

Despite this, the sums involved are becoming harder to balance. "Revenues are up, profits not so much," says Borg, citing higher crew, production, security and travel costs, international fees, and currency movements. Rush has responded by promoting fewer shows, scrutinising deals, and talking to artists about production budgets. Live Nation, meanwhile, sees higher ticket revenues as an opportunity to secure more ambitious productions. "The strong ticket sales we're seeing mainly allow us to attract even more artists and offer audiences an even broader range of shows," says Bergsjö.

Concert ticket-buying patterns are changing, too. Henrik Berndtson at AXS reports strong advance demand for major shows but shorter purchasing windows elsewhere, alongside greater appetite for premium seats and hospitality. He says this creates potential for a different kind of growth. "The biggest opportunity for our industry is not necessarily selling more tickets; it's creating more value around events and building stronger long-term relationships with audiences." Svensk Live's Andersson calls for tighter regulation of secondary ticketing and ticket resale mark-ups, which he says are increasingly impacting the live music experience.

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© Tricia Yourkevich

THE NOCTURNE

A stalwart of the electronic music scene, Martje Kremers has built a 25-year career at Primary Talent International on the back of after-hours endurance, an independent spirit, and unfaltering kindness. **Lisa Henderson** reports.

Martje Kremers' studies in social work have not gone to waste. During her 25 years as a London-based agent at Primary Talent International, representing the crème de la crème of electronic music acts, she has sometimes used those skills "too much."

"When I became an agent, especially in the first years, I was very motherly, and I ended up taking on a lot of tasks that went over and above what I should've been doing," she tells *IQ*.

Yet that maternal streak has earned her a reputation among colleagues and clients, including Justice, Basement Jaxx, Boys Noize, Vitalic, and Sbtrkt, as an empathetic, patient, and considerate agent. Or, as one promoter put it: "A big agent without a big ego."

Born in 1967 and raised in Mill (a small village in the south Netherlands province of Brabant), Kremers was drawn to live music early on. Despite their quiet, countryside upbringing, she and her friends would embark on small pilgrimages to major cities twice a month to see concerts.

Bad Manners, The Selector, Echo and the Bunnymen, The Cure, and UB40 were among the beneficiaries of the group's saved-up pocket money.

"It would take the entire day to get there – and then one of our parents would come and pick us up," Kremers recalls.

At 17, she moved to Eindhoven to study social work for three years, with a focus on the "cultural side." By that time, she'd moved into her punk and new wave era – sporting back-combed hair as an homage to Robert Smith – and had fallen head over heels for music.

"So, when I had to choose a place to do my work experience in my second year, I did everything in my power to find a place that had something to do with music," she says.

Her fate was sealed when she landed a placement at De Effenaar – one of the largest pop venues in the country, which had hosted Nick Cave and the Bad Seeds, the Cocteau Twins, Psychic TV, Pixies, and Sonic Youth – where she was tasked with an artist liaison role.

"That's where I started to think I wanted to work in music, but I hadn't sussed out how or what," she says. "But I knew I needed the lights to be brighter."

London Calling

Kremers arrived in London in the late 80s, just as acid house, rave culture, and shoegaze were washing through the city. After a short-lived stint as an au pair, she added another legendary venue to her resumé: The Marquee Club on Charing Cross Road.

With three bands performing a night, the club boasted a revolving door of talent – from KISS to Cliff Richard, Faith No More to Oasis, and PJ Harvey to The Cranberries.

Though Kremers' role was similar to that of her work experience at De Effenaar, there was a crucial difference: "I was getting a salary for it," she says. "That's when I knew it was going to be impossible not to do something with music."

Her Sunday-night shifts at The Marquee would end at 3am, at which time there was only one place to go out. Turnmills, the legendary nightclub located on Clerkenwell Road, had become the first venue in the UK to be granted a 24-hour music and

Testimonials

Martje has been such a wonderful person to know and work with over the years – warm, knowledgeable, and always someone you can rely on.

Congratulations on 25 fantastic years at Primary Talent, Martje – a brilliant achievement and so thoroughly deserved!

Sandra Abrantes | Everything is New

Working with someone as passionate about artists, building talent, and championing electronic music as Martje makes our relationship an absolute joy.

I've been incredibly lucky to work with her for over 20 years, and we've shared some amazing moments along the way. What makes Martje so special is her genuine love for what she does, her belief in her artists, and her commitment to growing the scene.

Her energy, positivity and passion are infectious. Every call and email comes with knowledge, enthusiasm, and a real understanding of how to present and develop her artists. She cares deeply about getting the best for them, and that shines through in everything she does.

She's a very special person, and we really do love working with her. Here's to m
more years of making great things happen together. Huge congratulations, Ma
this fantastic milestone!

Jeff Gray | Broadwick

I started working at D! Club in 2005, and I think we started working to

She is always kind and smiling, as well as incredibly efficient
fect person/agent to work with. Congratulations on that life

Thierry Collado | D! Club

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STUCK IN THE MIDDLE

As the internatonal tour circuit continues to grow, the mid-tier of the business – not only a crucial proving ground for future superstars but a workplace for career musicians and artists – is becoming a cause for concern. **Gordon Masson** talks to professionals around the world to discover some of the secrets to success in this tricky capacity range.

While arena and stadium tours have never been so buoyant, the downward pressure on those operating in the grassroots and mid-tier sectors has conversely never been more acute. Campaigns to help support grassroots clubs appear to be making a difference, but the stepping stone of the mid-tier (those performing between grassroots and arena level) is calling out for similar assistance, with promoters bemoaning a lack of suitable venues for this key element in artist development.

Eduardo Basagaña, founder of Buenos Aires-based EB Producciones, contends that the progression from 500-cap venues to mid-tier "is the most difficult jump in the music business," while admitting, "The [mid-tier] is where I do most of my shows."

Charly Beedell-Tuck at Solo Agency agrees. "In many ways, the gap between grassroots and mid-tier has become one of the biggest hurdles for emerging artists," she says. "At grassroots level, there are still opportunities for artists to get out, play regularly, build a following, and develop their live identity. But making that next step is much harder. There are only so many rooms available, and increasingly, artists are competing for the same opportunities."

Despite the challenges, Basagaña says an important part of his job is convincing artist representatives to be more conservative when they visit Latin America. "Instead of doing an arena show, I maybe propose two theatres, because a lot of artists that jump to arenas are forced to cancel shows or cancel tours when the ticket sales don't work. It's better [to have] two or three sold-out theatres than one half-empty arena."

Navigating a path to success, Basagaña nevertheless operates in an oversaturated marketplace.



Z|ART Agency booked Fat Cat in Munich for Ben Howard's *I Forgot Where We Were* 10th anniversary tour

"Getting people through the door is not just about having good music anymore; it's about building a genuine connection with an audience and giving them a reason to come back"

Charly Beedell-Tuck | Solo Agency

"There are too many offers: everybody's touring, but [the fans] don't have enough money," he says. But concentrating on the mid-tier is reaping rewards for EB Producciones.

"Costs can be a little lower because you are doing two days in a row. Or sometimes, with some artists, you can do two shows in the same day." Citing an example, Basagaña is promoting Netflix spin-off *Go! Live Your Way*. "It's very popular in Latin America, and we are doing 3,000-cap theatres, with two performances per day. It's the same number of tickets, but we make more money in four theatres than in one arena."

Across the other side of the world, Good Taste Production director Marek Szymański has achieved similar success in Poland.

"The A-level market is not necessarily the best choice for certain acts," observes Szymański, who urges agents to consider visiting the likes of Poznań, Gdansk, Wrocław, and Krakow, rather than just the Polish capital. "Mica Miller, who is an emerging British soul singer, sold [double the number of tickets] in Poznań than she did in Warsaw by playing two shows in the same day. It's profitable for us and for her because the costs are much lower. It can be exhausting, so it's not for every artist. But they can be creative and maybe perform slightly shorter sets, so it can be a good solution."

Underplays

Another promoter enjoying mid-tier rewards is Sam Perl at Gracia Live in Belgium, who cites a number of recent tours where theatre-sized buildings provided attractive underplay shows.

"We did this with Bob Dylan in October," he says. "[He did] three nights at Bozar in Brussels, and with such an intimate capacity we were able to ask a higher ticket price. It's a good model – the artist is happy, the audience is happy, and we are happy.

"We've done similar underplays in the mid-tier with Morrissey, also at Bozar, and with Billy Corgan with two dates at Queen Elisabeth Hall in Antwerp, one date in Bozar, two dates at de Doelen in Rotterdam, and two dates at Salle Pleyel in Paris – and every date sold out."

With the attention span of the average consumer on the wane, Billy Wood, who earlier this year launched new agency, HAUS23, opines, "You've got to be creative. Ticket price point is probably more important now than ever, while communicating the purpose of a tour is also important."

Beedell-Tuck advocates that approach. "Getting people through the door is not just about having good music anymore; it's about building a genuine connection with an audience and giving them a reason to come back," she says. "It's not simply about selling out a small venue once; it's about building consistency, developing an audience in different markets, and having the foundations in place to sustain growth. [Taking acts to mid-tier level] requires patience, careful planning, and a lot of belief in the artist. There are no shortcuts to building a sustainable live career."

At Primary Talent International, partner Sally Dunstone highlights the hard work needed to treat every client tour campaign individually. "Everything varies from artist to artist," she says. "When you've got a really good artist team – manager, agent, tour manager, production manager, promoters, and, of course, the artists themselves – and everyone is singing from the same hymn sheet, it makes it a lot more harmonious at any level – grassroots, mid-tier, up to arenas and stadiums."

Homing in on the mid-tier, Dunstone notes that varying venue sizes, market to market, can complicate tour plans. "Being mindful of scaling the show is always worth thinking about," she says. "You might not necessarily be able to fit the full production into each venue on a tour, and it's important you know that before you arrive in each location."

She also likes the underplay scenario. "I'm a big fan of not pushing promoters to put artists into rooms that are too big too early, because you just don't have anywhere to go from there," she says. "I like to think in long-term strategies, working back from where your ultimate goal is in five or ten years' time."

However, in Germany, Z|ART Agency founder Max Wentzler says the underplay is not as popular as it once was. "It's great for the labels, but it sucks for the artists because they're coming back and half their fans are gone," he observes. "To get around that, we like to offer two shows instead of one. If, for instance, it's an artist that last time played around 2,000 tickets in Berlin, rather than book the 3,500-cap venue, we'll suggest playing the 1,500-cap twice. It's not something every act can afford to do, because instead of paying the crew one day, they pay them twice. But there are also savings, so it's an interesting decision-making process."

One way Gracia Live took control of that uncertainty was to build a big top venue on a beach for Flemish act Camille. "Everyone goes to the coast at the weekend, even when the weather is bad, so places like Ostend are a bit crisis-proof," says Perl. As a result, the month-long *Circus Camille* concert series at the 2,000-cap Klein Strand tented village was a smash success. "She sold close to 60,000 tickets across 30 shows. It was really well received," says Perl.

Pricing

Outside of big-name underplays, Perl contends that Belgium's mid-tier market is dependent on inner-city ticket-buyers. "They like going to shows at Ancienne Belgique or De Roma, but that means they heavily scrutinise the ticket prices, s
we definitely need to be cautious – the maxi
we can go is maybe €34 or €35," he says.

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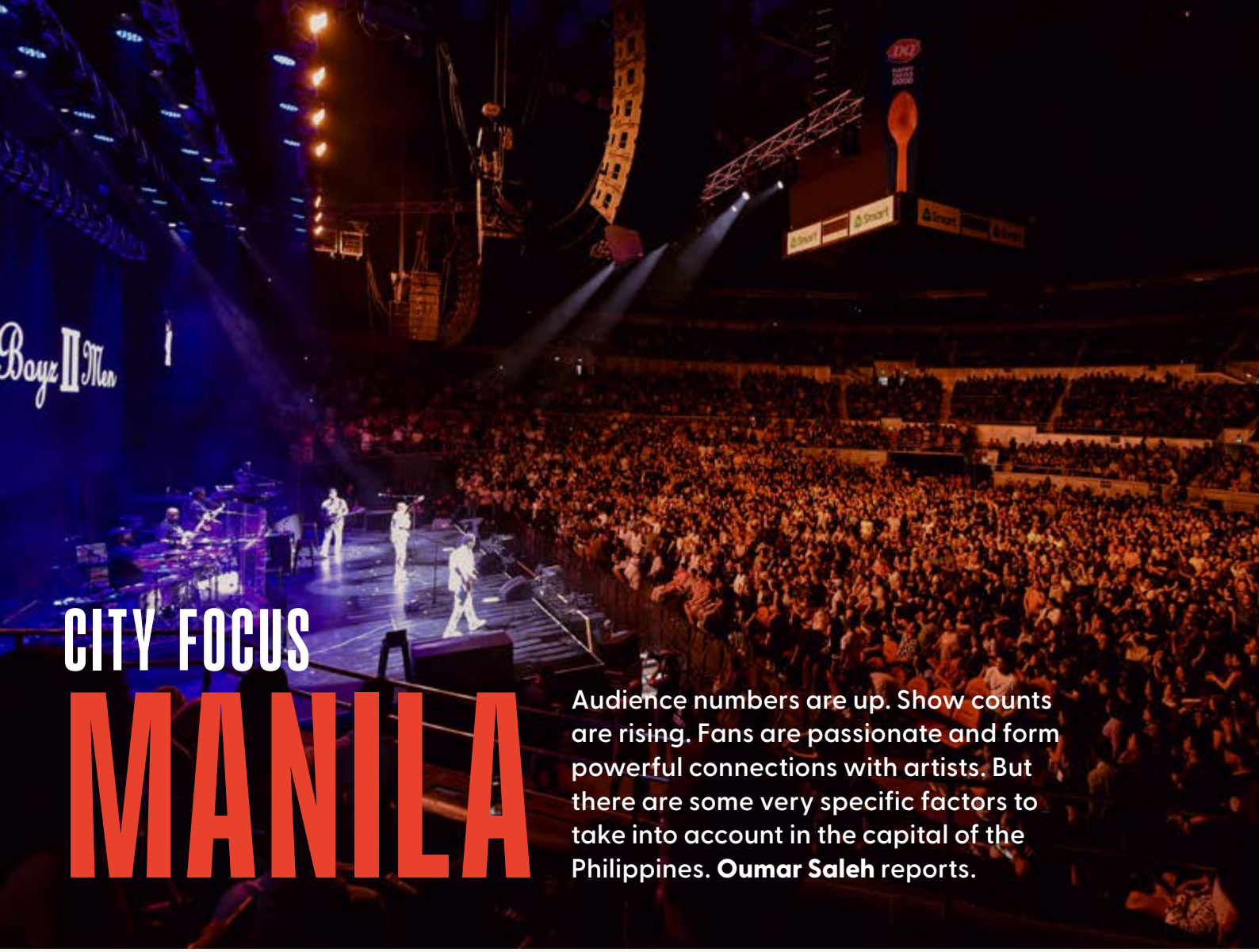

CITY FOCUS

MANILA

Audience numbers are up. Show counts are rising. Fans are passionate and form powerful connections with artists. But there are some very specific factors to take into account in the capital of the Philippines. Oumar Saleh reports.

Manila's live music market has one of the most valuable assets in the business: an audience that makes artists feel like superstars. Filipino fans sing every word, mobilise online, and build remarkably personal relationships with the performers they love. The challenge is turning that enthusiasm into a sustainable business, as promoters contend with price-sensitive consumers, rising touring costs, and an industry still developing the infrastructure to nurture its homegrown talent.

There are grounds for optimism. SM Mall of Asia (MoA) Arena welcomed more than 1.1m attendees across 200+ events in 2025 – a 10% increase on the previous year. Between January and August 2026, the venue staged more than 110 shows, with activity reportedly up by as much as 20% compared with the same period in 2025. Nationally, the Philippine Statistics Authority recorded gross value added of PHP87.4bn for arts, entertainment, and recreation in the first quarter of 2026, up from PHP81bn a year earlier. The latter figure covers the country as a whole and includes activities beyond live music, but it demonstrates the room to grow here.

For Manila's concert business, however, rising demand does not automatically mean rising margins. The Philippines has a substantial audience for international tours, a growing domestic music scene, and a highly digital culture. Making those ingredients work together commercially is the challenge.

LARGE VENUES

There's no shortage of space for productions at all scales in Metro Manila. The 15,000-seat SM MoA Arena is a key stop for international tours, while Smart Araneta Coliseum, with a capacity of around 20,000 depending on configuration, is another important destination for major concerts and domestic headliners. At the very top end, the Philippine Arena can accommodate approximately 51,000 people, while the SMDC Festival Grounds – located in Parañaque as part of the wider Metro Manila region – can host crowds of up to 70,000.

These spaces give promoters options, but capacity alone does not determine where an event belongs. Arnel Gonzales, general manager of SM MoA Arena, says venue selection increasingly involves weighing demand against the practical requirements of delivering a show.

"Venue selection today extends beyond seat count," he says. "Promoters evaluate expected ticket demand, production design readiness, budget considerations, audience accessibility, logistical requirements, and the overall event journey."

The distinction matters in a mar-

ASIA LIVE COMING TO ILMC IN 2027



Boyz II Men at Araneta Coliseum, promoted by Wilbros Live

ket where a large audience does not necessarily have the spending power to fill a venue at any price. The production, transport, and staffing requirements of a major show must be balanced against ticket prices that fans can realistically afford.

Gonzales also sees venues as part of a wider entertainment destination, rather than simply places to watch a performance. Dining, retail, transport, and surrounding amenities all contribute to the experience and to the commercial activity generated by an event.

"Fans may spend three or four hours inside the arena, but they spend the entire day experiencing the destination," he adds. "A world-class event ultimately requires a world-class journey."

Working together is an important factor for success, Gonzales says: "The most successful live entertainment destinations around the world are not built by any one organisation. They are built through partnerships."

AUDIENCES & DEMAND

For international promoters, the Filipino audience is both a major attraction and a commercial calculation. Fans are famously vocal and highly engaged, but the country's lower purchasing power relative to markets such as Singapore and Hong Kong puts limits on ticket prices here.

Glenn Llamas, chief operating officer of Wilbros Live, sees an audience that remains deeply committed to concerts but is becoming more selective as the touring calendar grows busier. "The Philippines remains one of the most passionate live music markets in the world," he says. "The biggest advantage today belongs to artists who have a genuine emotional connection with their fans, regardless of genre."

That connection can help a show cut through competition, but even devoted fans have finite budgets. And with more and more tours stopping here, the gap between enthusiasm and affordability is particularly visible in the distinction between international and domestic acts, says Andrea Hosking, business development manager at Midas Promotions.

"People who have money tend to watch more Western artists," she explains. "The ones who will go to a Daniel Caesar concert, for example, are the higher spenders. But a lot of the fans of Filipino music have less money to spend. International music is a bit of a luxury for some people, and they might never be able to watch those artists in concert."

Hosking says tickets for major international concerts can reach PHP10,000 to PHP15,000 at the premium end, while local shows are often more accessible, with starting prices around PHP500 to PHP1,000. General admission for international concerts, she says, would rarely fall below PHP1,500 to PHP2,000.

The appetite for overseas artists remains substantial, but Hosking argues that Manila offers something beyond immediate ticket revenue: visibility. The country's highly active social media audience can help turn a tour into a wider cultural moment, with fans sharing performances and content well beyond the venue.

"Western artists coming to the region won't necessarily make a lot of money compared with those other places," she adds. "But what you will get is virality and a very unique experience once you're touring in the market, because everyone's able to sing your songs back to you."

For Llamas, the answer is not simply to chase the biggest names. Promoters must balance artist fees, often charged in US dollars or British pounds, against Peso-denominated ticket revenue, currency fluctuations, costs, taxes, and permits.

"Our goal is not simply to bring in the biggest names, but to produce commercially sustainable shows that deliver great experiences for the Filipino fans," he says. "The Philippines has the audience, the passion, and the demand. The challenge is creating an operating environment that allows promoters to deliver more shows at sustainable costs and affordable ticket prices."

DOMESTIC MARKET

The strength of the domestic scene is central to Manila's identity as a live music market. Original Pilipino Music (OPM) continues to attract broad audiences, while P-pop, alternative rock, and international pop coexist within a listening culture increasingly shaped by streaming and social media.

Hosking believes Filipino artists can travel internationally without abandoning the musical and lyrical characteristics that make them distinctive. She points to Cup of Joe, whose Tagalog-language song *Multo* has found listeners in Japan and Indonesia, as an example of language not necessarily being a barrier to overseas discovery.

The pop rock band's rapid growth at home showcases the potential for growth that acts have here. After playing three shows at Smart Araneta Coliseum in November 2025, each reportedly drawing around 15,000 people, Cup of Joe moved to a stadium-scale performance approximately six months later.

"They're appealing to the masses by having Tagalog lyrics but also sounding a bit Western," Hosking says. "Maybe that's an example of language being less of a barrier. I'm interested in finding out whether singing in English actually appeals to more people, or whether it's the melody and the sound that matter more."

She is wary, however, of artists losing their local identity in pursuit of international crossover.

"So long as you keep the essence of Filipino music and Filipino roots, I think it definitely has the chance to go abroad. There is so much talent in the country. It's now time for us, as people in the industry, to bring that out."

In her view, the missing piece is a stronger pipeline connecting domestic success to opportunities elsewhere in Southeast Asia and beyond. Midas's regional network could help Filipino artists secure collaborations and support slots in other markets, but that requires deliberate investment in their development.

FROM GRASSROOTS VENUES TO ARENAS

For all the attention paid to Manila's biggest rooms, Hosking argues that the foundations of a sustainable music industry are built in much smaller spaces.

"People think there aren't many opportunities, but Manila is wonderful for artist development," she says. "There are so many cafés with i
house music systems set up. A F
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