

BIG & GETTING

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There's never been a better time to be in the live event business in Texas.

With four cities that could anchor most states as routing magnets, and enough distance between them to keep from cannibalizing box office, Texans get to enjoy visits from all the major tours on the road each year. Regional dynamism helps cultivate local flavors and new promoters, and the dozens of small and midsize festivals every month of the year provide great variety.

Grosses and ticket sales grew strongly in 2018, thanks to population growth all over the state, with new venues coming online to fill the few noticeable gaps in certain cities, giving hope that the growth will continue in 2019.

THE CIRCUIT

WE GET DEEP IN THE HEART OF HOW THINGS ARE GOING IN TEXAS

WAGNER NOËL PERFORMING ARTS CENTER, MIDLAND



Stephanie Rivas,
general manager

How did you do in 2018?

We had a great year. We had 191 events with a total of 107,963 tickets sold. We are a great venue for routing but knowing that our patrons will come out and support these acts makes all the difference.

Big shows

Disney Live, Jerry Seinfeld, Jo Koy,

Foreigner, Alison Krauss, Bob Dylan, Illuminate, Chad Prather, Darci Lynne Farmer. We had a lot of great shows in 2018. Our only subscription opportunity is for our Broadway in the Basin season. It had great titles this year, helping to increase our subscriber count, sitting now just under 1,000. For a venue with 1,827 seats, we are pretty proud of that.

Changes

We wanted to work on creating some new opportunities to engage with our communities and help introduce them to all that we have to offer. We held three free movie days in the summer months of June, July and August that we tagged Cinema Under the Stars. The venue has a unique star field in the ceiling that makes it feel like your sitting under the West Texas sky. Patrons were invited to get out of the summer heat, sit under our "stars" and enjoy the day watching three free movies.

What went right

For us doing it right means

keeping a consistent variety of programming. It is the best compliment when someone says, "You really have something for everyone."

What went wrong

I can't say that anything went wrong. Not every event is a win, so when we don't win we just do our best to learn from that experience

AMERICAN AIRLINES CENTER, DALLAS



Dave Brown,
chief operating officer and general manager

How did you do in 2018?

We hosted 47 concerts, besting our previous best total of 45. And with more available dates, we would have easily broken the 50 mark. In addition, we also hosted marquee sporting events like the NCAA Division I Men's Basketball Championship Round 1 and 2 and

UFC 228.

Big shows

Pink, Justin Timberlake, Bruno Mars and Elton John were some of the biggest we saw in 2018. All performing double nights, with JT and Bruno performing a total of three shows in less than a 12-month period. Michelle Obama was another big one for our market and a different format of show than we are used to seeing. It was a fast sellout and large gross.

Changes

We launched our AAC app in the fall with the move to exclusive mobile ticketing. The app has been a game changer to our guest experience, giving our guests one location to plan their whole experience.

What went right

The big shows are doing huge numbers in Dallas, not only in ticket sales but also tour merchandise. Dallas continues to be one of the fastest-growing cities in the

CONTINUED ON PAGE 30

Pink performs at American Airlines Center in Dallas.



Arena

Exhibit Hall

Fields

Midway

Pavilion

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CONTINUED FROM PAGE 28

country, which has really accelerated demand for entertainment.

What went wrong

We literally started running out of bookable dates in the fall when most tours were wrapping up. We are a two-team building, home to the Mavericks and Stars, so we start the season with 80 unavailable dates on the calendar.

SMART FINANCIAL CENTRE AT SUGAR LAND

David Skinner, general manager



How did you do in 2018?

2018 was our second year open

for business, and we definitely did not have a sophomore slump. We finished No. 9 (in Pollstar's ranking) in the world in ticket sales for venues under 10,000 seats. We

deepened our relationships with a variety of outside promoters in addition to a solid lineup of in-house bookings. Variety and diversity of our programming has been a mission for us and I think we have shown that Smart Financial Centre can be successful with a very wide range of shows that appeal to a wide range of audiences.

Big shows

We had some huge shows in 2018, from three sold-out shows with Dave Chappelle and Jon Stewart to sold-out shows with The Killers, Khalid, Erasure, Slayer, Bad Bunny and many others. Our Christian music shows also proved to be massively successful with the Mercy Me and Lauren Daigle tours.

Changes

As 2018 was just our second year, we didn't have any major changes or improvements. We learned and implemented better ways to serve our customers and how to better utilize our space not only for customers but for sponsors and

back of house.

AUSTIN360 AMPHITHEATER, AUSTIN

Glynn Wedgewood, general manager

How did you do in 2018?



We'd been in the range of 22 to 25 events per season with Live Nation but last year we were up

to 33. It was the busiest and most successful season we've had so far, with 270,000 attendees.

Big shows

Foo Fighters, Eric Church (which we rescheduled for 2018 after his 2017 show was canceled because of Hurricane Harvey), Post Malone, Imagine Dragons, Logic, Queens of the Stone Age, and Slayer.

Changes

None, really. We didn't deviate too

much from our partnership with Live Nation and C3 Presents. Venue improvements are a constant for us or doing things to tweak the staffing and improving our operations.

What went right

We had a run in the middle of the season of five shows back to back, and that was part of a run of seven shows in nine days. When you think about what that takes to load in a band at 8 o'clock in the morning and then run for 20 hours so you only have a four-hour turnaround, it takes a lot to run those shows at a high standard. Getting everybody working together for five days straight on very little sleep was something I was very proud of.

What went wrong

We've had Willie Nelson's 4th of July Picnic for a number of years and last year while we were expecting some weather it wound up getting a lot heavier. It came in so hard we had to evacuate in the middle of the day, getting people out into their cars or our buildings to keep everyone safe. You have to have a

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plan for weather and sometimes it comes in worse, but you have to roll with it and do whatever it takes.

BASS CONCERT HALL, AUSTIN Will Shirey, talent buyer



How did you do in 2018?

2018 was a very strong year for us on all

fronts. We did more stand-alone commercial events and sold 15 percent more tickets than any other year on record. We worked with new partners, explored new programming opportunities with our Essential Series and had a strong year of Broadway with seven titles over seven weeks. Our in-house F&B company made great improvements to the bars and food service in the building enhancing the fan experience and, most importantly, we rolled out extensive updates to

our security policies and infrastructure to ensure the safety of everyone attending events in our building.

Big shows

Two Steve Martin and Martin Short dates, which put up the highest combined gross of any concert event in venue history, "Book of Mormon," David Byrne, Max Richter's eight-hour overnight performance of "Sleep" during South by Southwest to 200 sleeping fans on Beautyrest mattresses set out on the Bass Concert Hall stage, and the Philip Glass Ensemble performing "Koyaanisqatsi" live.

Changes

We added magnetometers and self-scanning ticket podiums at the main entrance, implemented a new clear bag policy and added or upgraded multiple bars. We also completed a major dimmer upgrade in our McCullough Theatre.

What went right

The enhanced fan experience in the building and growth in almost

Bass Concert Hall sold 15 percent more tickets than any other year on record in 2018.



every aspect of the business.

What went wrong

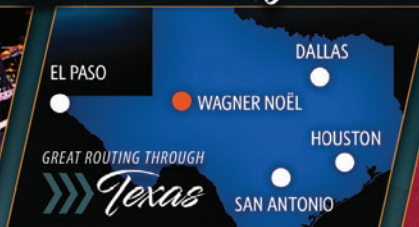
We lost one of our dear friends and beloved box office managers, Josh Bernard, in 2018. His name is now displayed on what he always thought was the best seat in the

house in Bass Concert Hall. He is sorely missed by all of our staff and patrons that he worked with over his years with Texas Performing Arts.

CONTINUED ON PAGE 33



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TOPSTOPS TEXAS

Ranked by tickets sold. Based on data from concerts and events Jan. 1-Dec. 31, 2018, as reported to Pollstar. Data updated as of Jan. 25.

RANK	VENUE	TICKETS SOLD	CAPACITY	GROSS	SHOWS
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MORE THAN 30,000 CAPACITY

1	AT&T Stadium, Arlington	291,384	100,000	\$39,161,999	6
2	NRG Stadium @ NRG Park, Houston	205,206	70,000	\$23,327,477	4
3	Minute Maid Park, Houston	80,180	41,500	\$11,694,823	2

15,001-30,000 CAPACITY

1	American Airlines Center, Dallas	749,409	20,021	\$64,442,636	71
2	The Cynthia Woods Mitchell Pavilion, The Woodlands	493,298	16,015	\$19,936,686	58
3	Toyota Center, Houston	447,291	18,000	\$43,314,078	49
4	Dos Equis Pavilion, Dallas	331,436	20,000	\$13,161,904	23
5	AT&T Center, San Antonio	261,863	18,000	\$20,834,628	23

10,001-15,000 CAPACITY

1	Austin360 Amphitheater, Austin	229,756	13,164	\$11,085,832	27
2	Freeman Coliseum, San Antonio	51,474	10,150	\$4,137,188	9
3	UTEP Don Haskins Center, El Paso	49,900	12,000	\$3,857,429	8
4	Sam Houston Race Park, Houston	17,125	15,000	\$470,267	3
5	Ford Park Pavilion, Beaumont	15,404	14,000	\$496,479	3

5,001-10,000 CAPACITY

1	Smart Financial Centre of Sugar Land	361,801	6,500	\$24,843,615	95
2	Toyota Music Factory, Irving	221,631	8,000	\$11,144,225	59
3	State Farm Arena, Hidalgo	124,500	7,500	\$9,079,855	43
4	H-E-B Center, Cedar Park	108,034	8,700	\$5,604,224	34
5	Whitewater Amphitheater, New Braunfels	81,372	5,600	\$3,073,610	19

2,001-5,000 CAPACITY

1	Bass Concert Hall, Austin	177,739	2,900	\$11,748,295	79
2	Austin City Limits Live at The Moody Theater, Austin	163,429	2,765	\$8,513,502	82
3	The Plaza Theatre, El Paso	92,288	2,044	\$6,130,685	67
4	South Side Ballroom, Dallas	65,120	3,800	\$2,097,323	21
5	Margot & Bill Winspear Opera House, Dallas	35,848	2,295	\$2,652,849	22

2,000 OR LESS CAPACITY

1	H-E-B Performance Hall At The Tobin Center, San Antonio	134,560	2,000	\$6,435,646	106
2	Wagner Noël Performing Arts Center, Midland	114,964	1,827	\$5,889,228	125
3	Emo's, Austin	87,097	1,550	\$2,329,916	86
4	McAllen Performing Arts Center, McAllen	43,009	1,828	\$2,444,779	44
5	White Oak Music Hall, Houston	39,643	1,400	\$925,142	76

Note: Capacity shown is legal capacity listed in Pollstar database. Compiled by teamboxoffice@pollstar.com

TOBIN CENTER FOR THE PERFORMING ARTS, SAN ANTONIO



Aaron Zimmerman,
vice president of
programming and
marketing

How did you do in 2018?

It was a banner year. We saw between 7 (percent) and 10 percent growth in ticket sales, and that continues a trend we've seen since 2015.

Big shows

We had David Byrne sell out twice, and that's the first time we've had the same show in the spring and the fall. Culture Club came for its third sold-out show in two years, this time with Thompson Twins, and we had the Echo and the Bunnymen and Violent Femmes co-headlining tour. We also had a reading from President Bill Clinton, and good shows from Fleet Foxes, Shinedown, Jason Isbell, Weird Al Yankovic, Jason Mraz and Billy Idol.

Changes

We hired our first digital content coordinator because we're doing less and less traditional mediums like print for marketing. Some of the higher art stuff like symphony and ballet still use that, but the majority of our plans have shifted to digital and online marketing.

What went right

We're seeing non-touring artists becoming more successful, and that's shows from different podcasts and comedians, television stars, book tours and lectures. Those aren't in the normal medium of "Let's go to a rock concert," and those performances are helping to fill the calendar and balance out the demographics of people we're reaching.

What went wrong

Some of the nostalgia acts that have traditionally toured performing arts centers aren't performing as strongly because those audiences are getting older. That's where the new digital measures we're taking to reach millennials are helping to fill gaps we're seeing from artists who have toured every year for 20 or 30 years. ▣



Tobin Center has put in new measures to reach millennials as the majority of its marketing shifts to digital platforms.

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Q&A

KRISTYN CIANI, TALENT BUYER, C3 PRESENTS



IN THE 13 years Kristyn Ciani has logged as a talent buyer with C3 Presents, she's seen the Austin-based company grow by leaps and bounds. Its festival business, which began humbly with Austin City Limits Festival in 2002, now covers the globe, and the company's traditional concert and casino business made it attractive enough that Live Nation bought a controlling stake in 2014.

Ciani's split responsibilities for the Austin and Las Vegas markets give her the perspective to dish on the Lone Star State and how it compares to others around the country. Her short answer: Texas is open for business.

How is Texas doing?

Texas remains a very steady, healthy music market. A large part of that is all the growth in our state and the top four or five cities are outweighing most other markets. We've got such tremendous growth with people moving here for new jobs and that is a big plus in the live entertainment space.

We're also seeing the I-35 corridor between Austin and San Antonio playing a big role, with those two cities eventually becoming one metroplex. Around the state each market is big enough to support its own music economy, so we can run shows for 1,000 to 2,000 capacity in each market without any conflict. That's a benefit because we can say to someone who's picked a festival in Tulsa or New Orleans, if they want to do some hard ticket dates to support that we'll get them a show in Dallas, Houston, Austin and San Antonio, or some combination of the four.

Anything else playing a role?

Culturewise, we've always been a no-brainer in the Americana and roots space, but we're slowly starting to expand what we're known for. We're not Nashville or New Orleans, where we're known for one specific world, and we've started to expand the genres where we're getting more into the urban space, the eclectic rock spaces, obviously dance music and we're trying to get more into the Latin space. There's a push to diversify the music in Texas because we're an easier state to

travel to for festivals and there's lots of places to put large events.

Do you see any gaps around the state in terms of venue stock?

In Austin there's not a 3,000- to 5,000-capacity venue at this moment, but when the Moody Amphitheater at Waterloo Park opens that will check that box. We could use more seated venues in Austin that are on the smaller side to suit more intimate shows.

How's the state's festival market?

It's very strong. You've got events happening almost every month of the year in just about every major market. That's true of even some of the smaller markets on the outskirts, and they all touch just about every music space with your dance festivals, hip-hop, ACL Fest, South by Southwest, Willie Nelson's Picnic, and then all the food and music festivals that are happening. There's even stuff happening in El Paso, which you never would have thought of as a major music market and they've got the Neon Desert festival.

Are there up-and-coming players?

The festival space is hard to get into, bottom line. You can have some small event but to grow it to a 75,000- to 100,000-capacity festival is really tough. What I think the other promoters are doing well is coming up with creative ideas to keep them small

and intimate until the market dictates otherwise. Levitation Festival was a multiday festival at Carson Creek Ranch outside of Austin and they've moved that into the music venues to create a unique kind of festival that's still built around the same concept. JMBLYA out at Austin360 Amphitheater is another big one, and they can all be different and successful without being enormous.


What makes Texas so fertile for festivals?

A big part of it is that we've got so much space here. And there's lots of land outside the major markets, which means you don't have to drive an hour away to go and put up a music festival. And it's also the case that some people like to throw a festival in the heart of a city like we do in Chicago for Lollapalooza or ACL Fest in Austin. But if you're doing something unique or more subdued like some of the folk-type festivals, then it makes sense to get a bit away from the cities to create a distinct identity with camping, great beer and bluegrass music.

How price sensitive are the different markets?

Urban, dance and pop music in the last five years have been the driving forces in what's selling tickets, and you can get by with a much higher ticket than you used to be able to, especially in the last three years. People here in Austin do put up a stink about not wanting to pay what's normal for a New York or Los Angeles, or even Dallas, but it's less so than it used to be. So I wind up pricing lower in Austin than in the other Texas markets.

Rank the four major Texas markets in terms of industry importance.

I'm biased but Austin is No. 1 because there's the biggest support system for live music, which is the most important part of a musician's career right now. Plus there's big festivals, and we do over 1,000 shows there a year. From there, probably Dallas, then Houston and San Antonio. 



ACL Fest with the Austin skyline in the background.

KATRINA BARBER; SYDNEY GAWLIK

SPOTLIGHT

Scene: Austin

IS THE HOME OF SOUTH BY SOUTHWEST STILL THE HIPPEST? AND DOES IT MATTER?

GRAHAM WILLIAMS HAS seen his hometown of Austin grow up from a sleepy college town—and an afterthought to most concert tours—to become one of the most prominent cultural and economic powerhouse

cities in America. Since he started promoting underground punk and metal shows as a high schooler in the mid-90s, he's grown into one of the city's best-known promoters, and his company Margin Walker Presents is the largest independent promoter in Texas, with regular events in Austin, Dallas and San Antonio. In the mid-2000s he co-founded Transmission Events, which promoted in most of Austin's biggest clubs and midsize venues and earned national acclaim during the 10-year run of its multi-day Fun Fun Fun Fest.

VenuesNow caught up with Williams by phone to talk over what's happening in his fast-growing and ever-changing city.

You operate in Austin, Dallas and San Antonio. How is Austin different from other cities? San Antonio does about half as

many people for the same show in Austin generally, though some artists do get the same crowd. In general if 1,000 people show up in Austin, then 500 will show up in San Antonio. Austin has a whole district along Red River Street, which helps things a lot since there's lots of venues and nightlife in one place so you can get dinner, see a show and then be able to pop into another place in the same night. You're constantly around music here.

How has Austin changed in the 20-plus years you've been promoting?

It's bigger and more diverse in terms of the kinds of bands. When I was a kid Austin had a sound, with the blues-rock thing in the '80s along with the space cowboy thing with Stevie Ray Vaughans

GRAHAM WILLIAMS
Founder,
independent
promoter Margin
Walker Presents

and Willie Nelsons all over the city. In the underground scene there was the weird druggy stuff like Butthole Surfers with all the noise-punk stuff and some funk

as well. So for a while you kind of knew what bands from here sounded like. Now there's so much going on with so many different big and small genres. Overall everything is just bigger since we've been America's fastest-growing city and the population here has doubled since I was in high school.

Are there any gaps in the kinds of venues in Austin?

There's no shortage as far as number of clubs and there's tons of small venues with caps below 1,000. But then things jump all the way up to 2,200 and above at Stubb's, ACL Live and Bass Concert Hall, and the only venue in between is Emo's, and that's not

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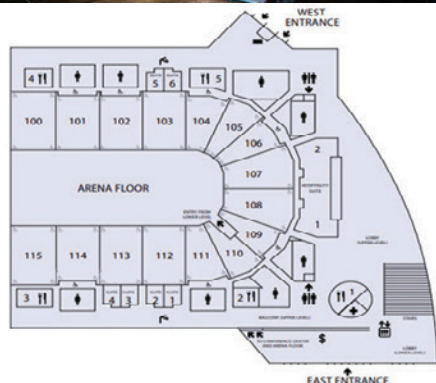
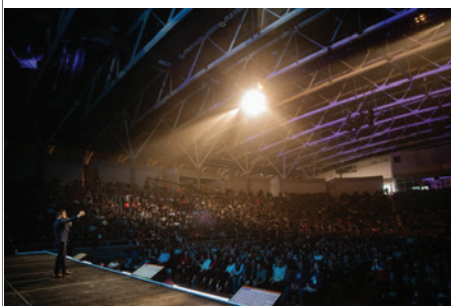
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CONTINUED FROM PAGE 35

downtown. So you can either play a small room and turn away 500 or 600 fans or play a big room and know the back third or half is going to be empty and feel weird. There's an even bigger gap between those 2,500-cap rooms and what comes next, which is 14,000 at Frank Erwin Center or Austin360 Amphitheater. Those places can get creative and cut their venues in half or not use the lawn outside but that's still an 8,000-person setup. If you're a band that can sell 4,000 or 5,000 tickets, and there are a lot of artists at that size, you either have to play two nights at Stubb's or ACL Live or play one show at a very empty giant room. And then you get into not being able to pay the artist what they're worth because of the room cost.

What's the price sensitivity in Austin?

Dallas and Austin are pretty similar. San Antonio is definitely the most price sensitive, in part because there music hasn't been such a big focus as in other cities. But Austin is still much cheaper than your big cities like L.A. and New York. Here a handling fee might be five bucks whereas in those other places it gets a little insane with \$10 or \$15 in fees on a \$25 ticket. We can't push it too much more than what it is.

Is South By Southwest still as vital for venues as it was 10 or 15 years ago?

It's definitely dropped off some but I've watched that thing roller coaster up and down through the years. We're at a point where the music part of the festival is smaller while the tech, education and interactive side is bigger than it's ever been. I tend to handle non-South By shows so I can't speak for the venues where it all depends on bar sales. But because overall live music is doing better than the rest of the industry, venues are able to see more growth throughout the rest of the year to make up for however things have dropped off a bit in mid-March. ... There's less of the mega acts like the year when there was Prince and A Tribe Called Quest in a tiny club, but that stuff was never what South By was supposed to be about and as a promoter I don't care about that. I want to see Soccer Mommy or Anderson .Paak or whoever the new big artists are in a given year.

Is Austin no longer a secret?

In movies and TV shows people are constantly referencing Austin as the cool place a band member or someone else needs to get to. It's just like saying Brooklyn or anything that's thought of as a cool or hip city. We're definitely one of if not the place for that in the entire country. There are people who don't like it now that we're not a secret or a private, hip little spot. I always laugh at the "Stop moving here" mentality, because none of the people saying that are from here originally. 📍

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