

fimj FEDERAZIONE
INDUSTRIA
MUSICALE
ITALIANA

MILANO
DIGITAL
WEEK

YES MILANO

I numeri del mercato mondiale



GLOBAL GROWTH IN MUSIC

↗ **5.9%**

Global recorded
music market growth.

50%

Digital music share
of global revenue.



FIGURES AT A GLANCE

↗ **17.7%**

Growth in digital
revenue.

↗ **60.4%**

Growth in streaming
revenue.

↘ **7.6%**

Decline in physical
revenue.

↗ **7.0%**

Growth in performance
rights revenue.

↗ **2.8%**

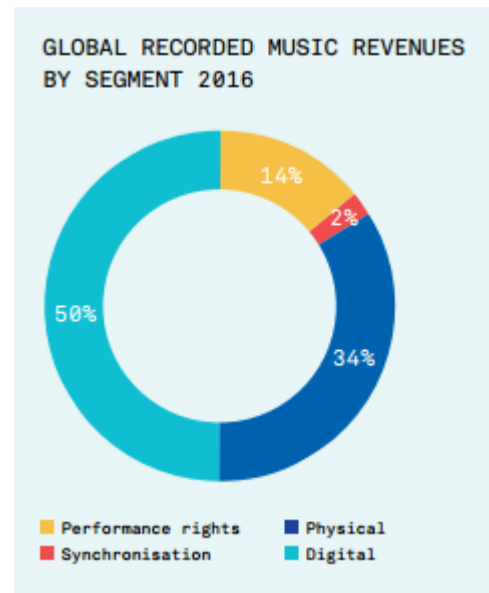
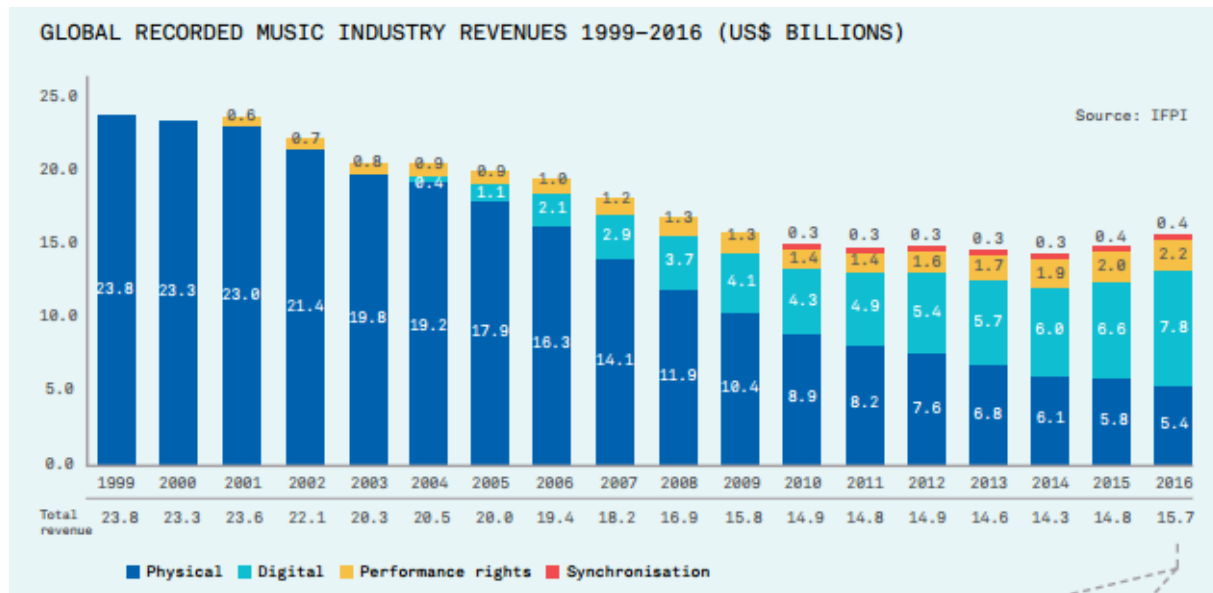
Growth in
synchronisation
revenue.

I principali mercati nel mondo

Rank	Country	Trade value	
		US\$ (M)	Local currency (M)
1	USA	5,318.21	5,318.21
2	Japan	2,745.99	298,709.32
3	UK	1,251.14	925.84
4	Germany	1,212.00	1,090.80
5	France	849.59	764.63
6	Canada	367.98	475.16
7	Australia	357.26	496.77
8	South Korea	330.17	384,523.96
9	Italy	263.77	237.39
10	Netherlands	243.36	206.86

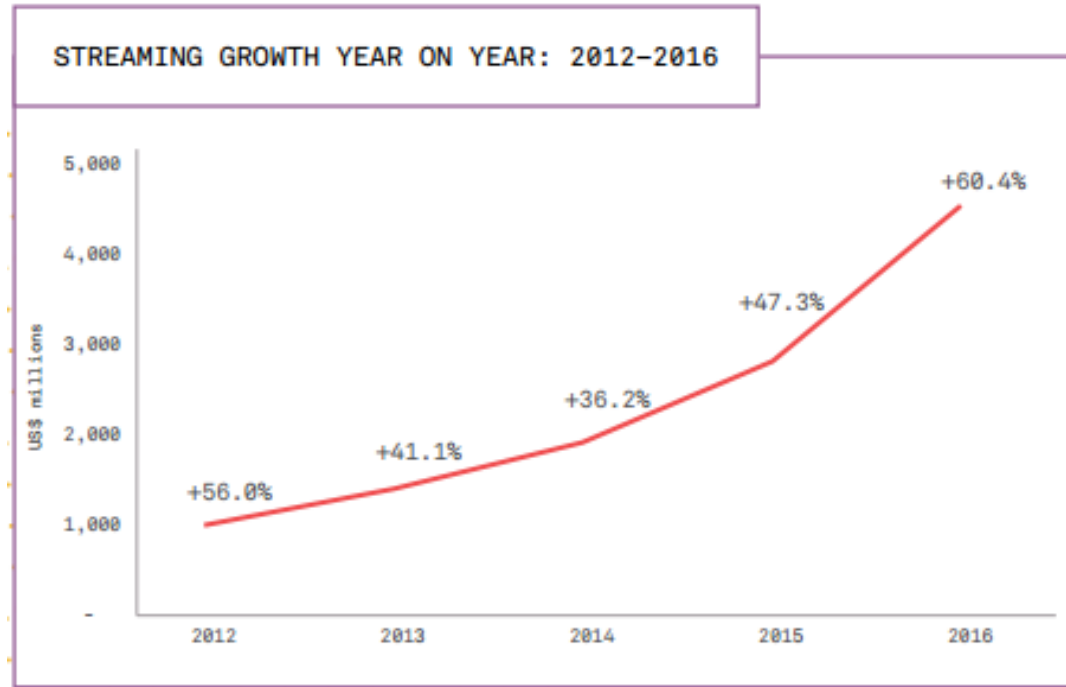
L'evoluzione del settore

Prima di tornare a crescere nel 2015, l'industria discografica globale **ha perso quasi il 40% dal 1999 al 2014.**



La crescita dello streaming

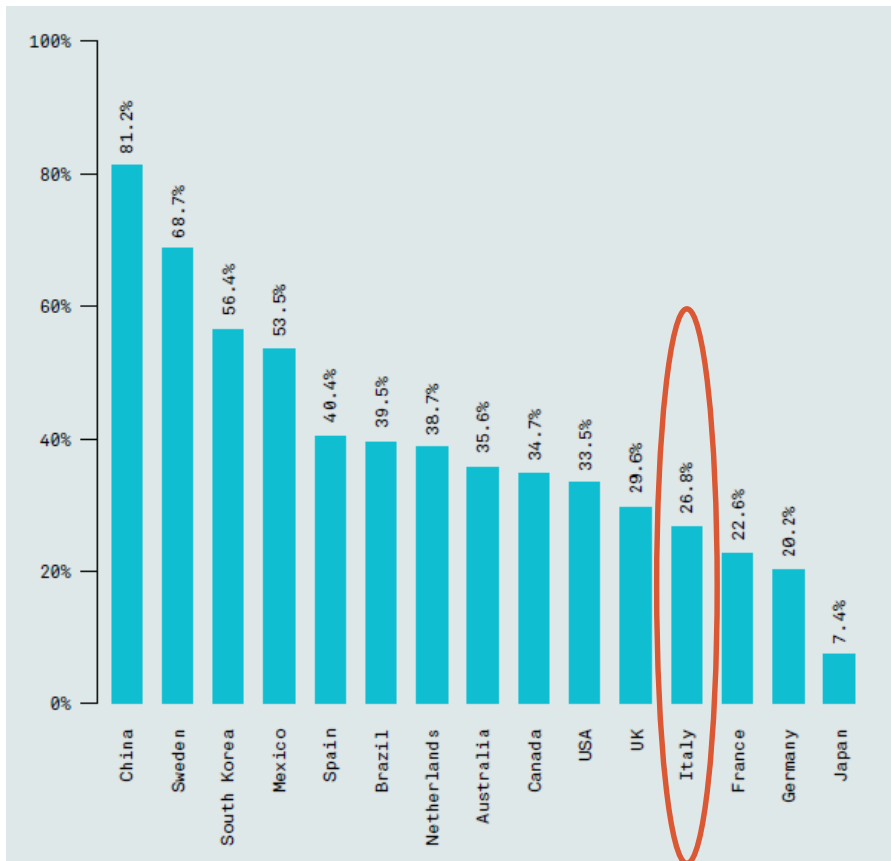
Il grafico mostra il trend di crescita globale dello streaming.



La crescita degli utenti streaming in abbonamento.

↗ **112m**
users of paid
subscription accounts.

Ricavi derivati dallo streaming



Percentuale dei ricavi generato dallo streaming nei primi 15 mercati del mondo.

Il mercato discografico Italiano

I numeri del mercato italiano

Il mercato discografico **italiano** nel 2016, ha registrato un **+0.4%** per un valore totale di **149 milioni di fatturato**.

Lo streaming musicale registra un +30% e i ricavi dagli abbonamenti quasi il **40%** di incremento rispetto al 2015.

MERCATO FISICO

54% del mercato
totale
-8% rispetto 2015

STREAMING

+30%

70% del mercato
digitale

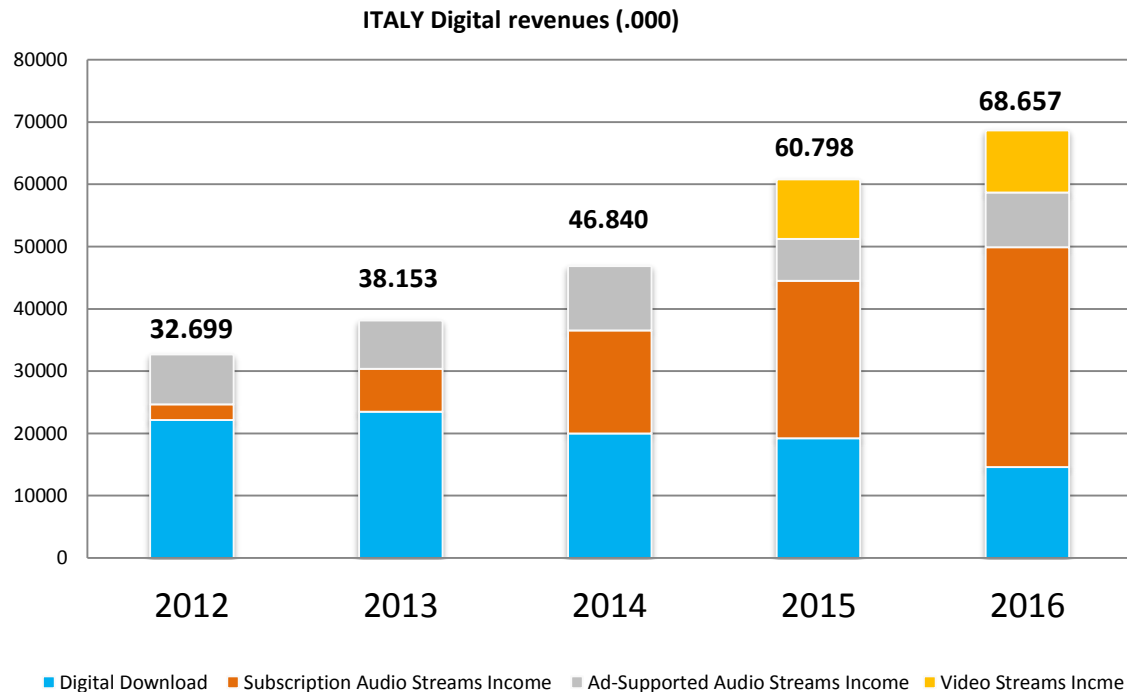
STREAMING SUBSCRIPTION

In abbonamento
è cresciuto del
39,4%

VINILE

+52%
6% del mercato

L'evoluzione del mercato

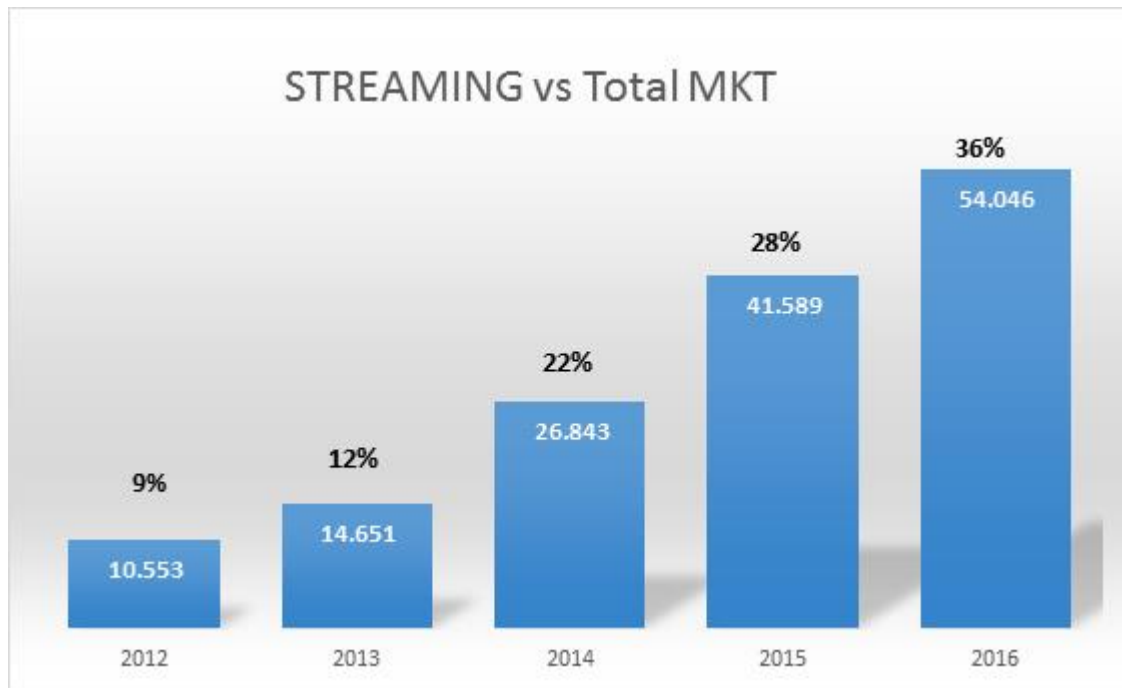


Il mercato discografico è completamente cambiato negli ultimi anni, per **composizione e struttura**.

I ricavi sono sempre più generati dal comparto digitale, nonostante una certa “resistenza” del mercato fisico in Italia.

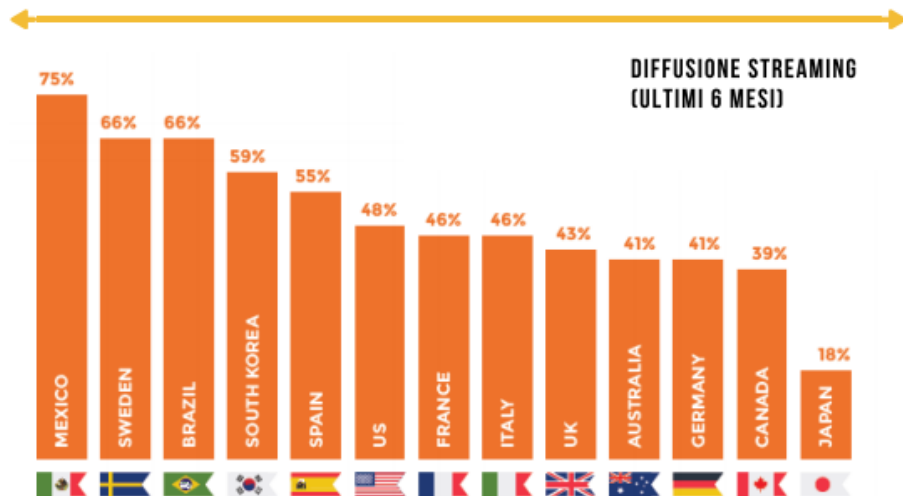
La crescita dello streaming

Il segmento dello streaming, attualmente corrisponde al **70% del mercato digitale in Italia.**



Music Insight Report IPSOS

Lo **STREAMING** è una forma di ascolto musicale sempre più diffusa in Italia.



98% DEGLI UTENTI ATTIVI ONLINE CONSUMA MUSICA IN LICENZA

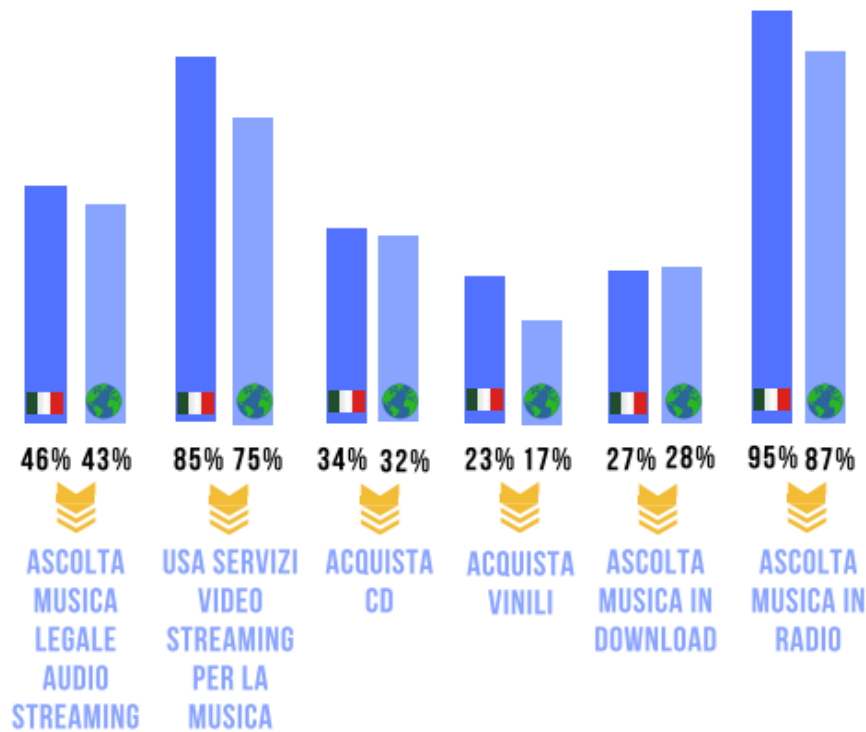


46% HA PAGATO PER LA MUSICA
NEGLI ULTIMI SEI MESI

→

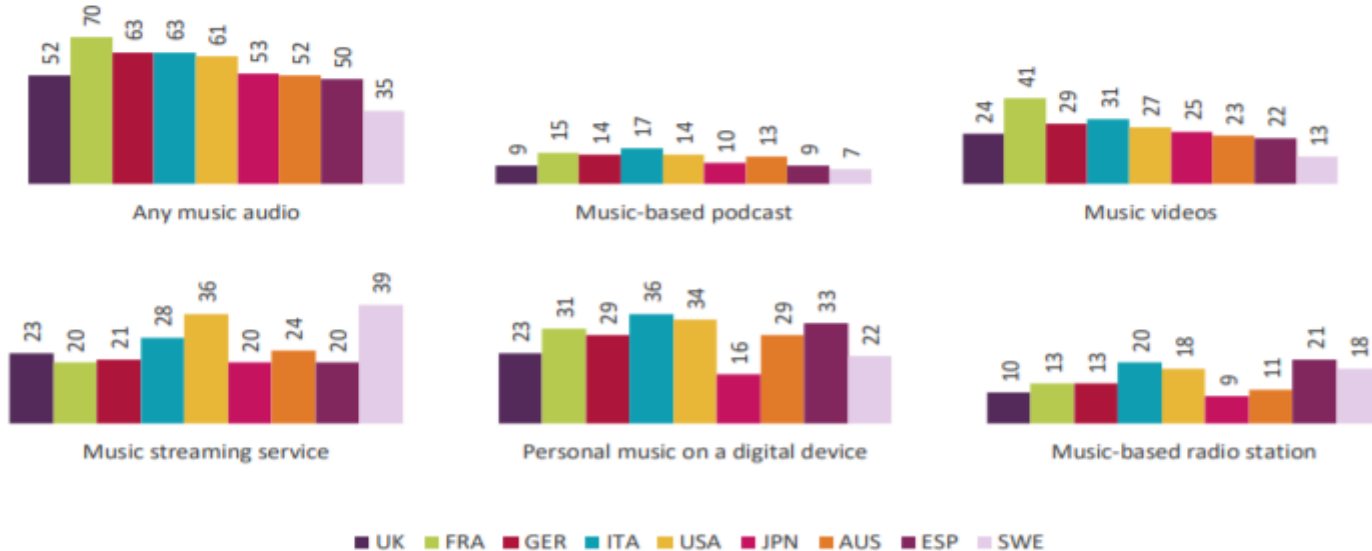
Music Insight Report IPSOS

Quali sono i modi in cui si ascolta **MUSICA** in Italia nel 2017?



Uso smartphone per l'ascolto di musica

Proportion of respondents who personally use each device (%)



Source: Ofcom research 2017

Base: All respondents who use these devices UK=828, FRA=859, GER=868, ITA=907, USA=763, JPN=764, AUS=836, ESP=908, SWE=834

Q15d. Which, if any, of the following audio activities do you use each of your devices for? Smartphone/mobile phone

La Musica sui social

Over 40% of Music Fans Following Bands/Singers on Social

Top 10 Types of Accounts Followed by Music Fans*

% of Music Fans who say they follow these types of accounts on social media



Quale di queste persone o organizzazioni preferiresti seguire sui SN?

Global Webindex Q1 2017 | Su: 45.968 Fan Musicali tra i 16 e i 64 anni.

Top 3 Over-Indexes

1.48 | Singers, musicians or bands **1.29** | Comedians **1.28** | Actors

*Music Fans are defined as internet users aged 16-64 who say they have a strong interest in music

#1

Justin Bieber

281,833,989

f 78.5M i 97.8M t 105.6M

#2

Taylor Swift

265,916,120

f 73.6M i 106.7M t 85.6M

#3

Rihanna

258,481,401

f 81.1M i 90.9M t 86.5M

#4

Selena Gomez

252,514,267

f 61.8M i 134.6M t 56.2M

#5

Katy Perry

246,552,963

Curation, playlist e social media



74%

OF THOSE WHO
STREAM MUSIC
ONLINE PLAYLIST



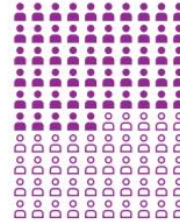
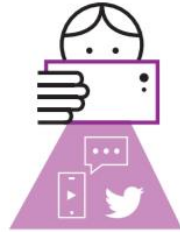
58%

OF LISTENERS CREATE
THEIR OWN PLAYLIST
(57% IN 2016)



32%

SHARE PLAYLISTS
WITH OTHERS
(24% IN 2016)



55%

OF ALL MUSIC LISTENERS USE
SOCIAL MEDIA TO FOLLOW
OR STAY INFORMED ABOUT
MUSICIANS THEY LIKE.

TYPE OF SOCIAL MEDIA CONTENT MUSIC FANS ARE LOOKING FOR (SELECTED)

1



UPCOMING
ALBUM NEWS

54%

2



UPCOMING
TOUR NEWS/DATES

50%

3

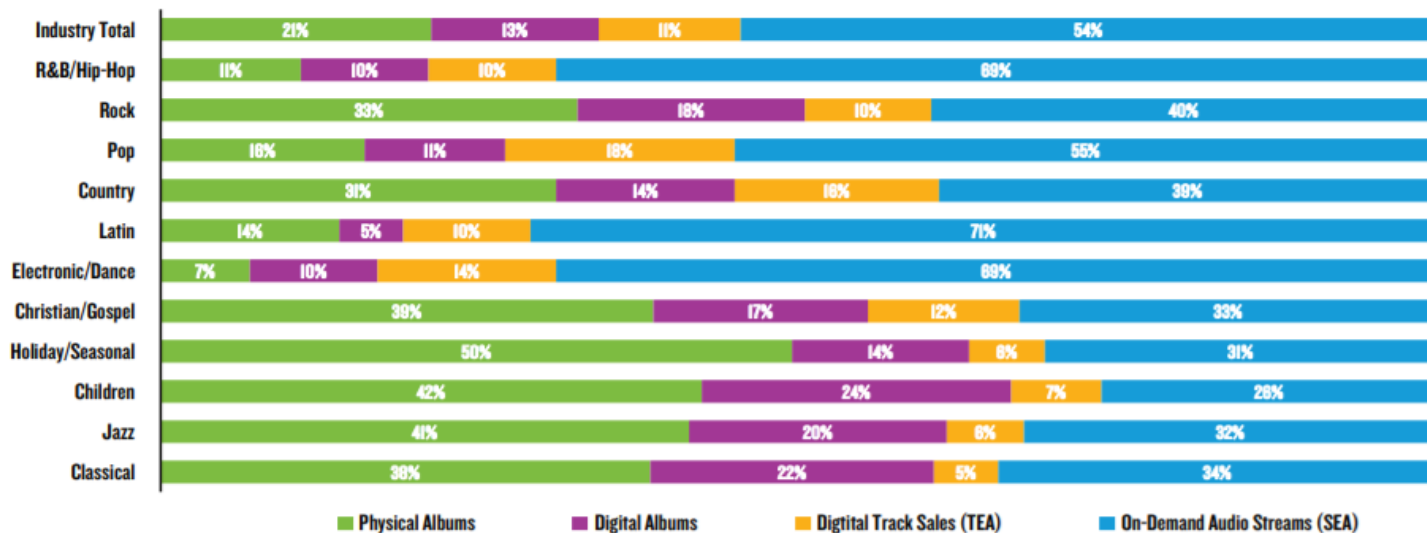


BEHIND THE SCENES
OF AN ARTIST'S LIFE

48%

L'evoluzione creativa e lo streaming

SHARE OF TOTAL AUDIO CONSUMPTION BY FORMAT



Read as: 33% of Rock consumption comes from Physical Album sales

L'innovazione

- Smart speaker
- VR
- Artificial intelligence
- Blockchain