

TOTAL MARKET VALUE AND STRUCTURE OF FINNISH MUSIC EXPORTS IN 2007

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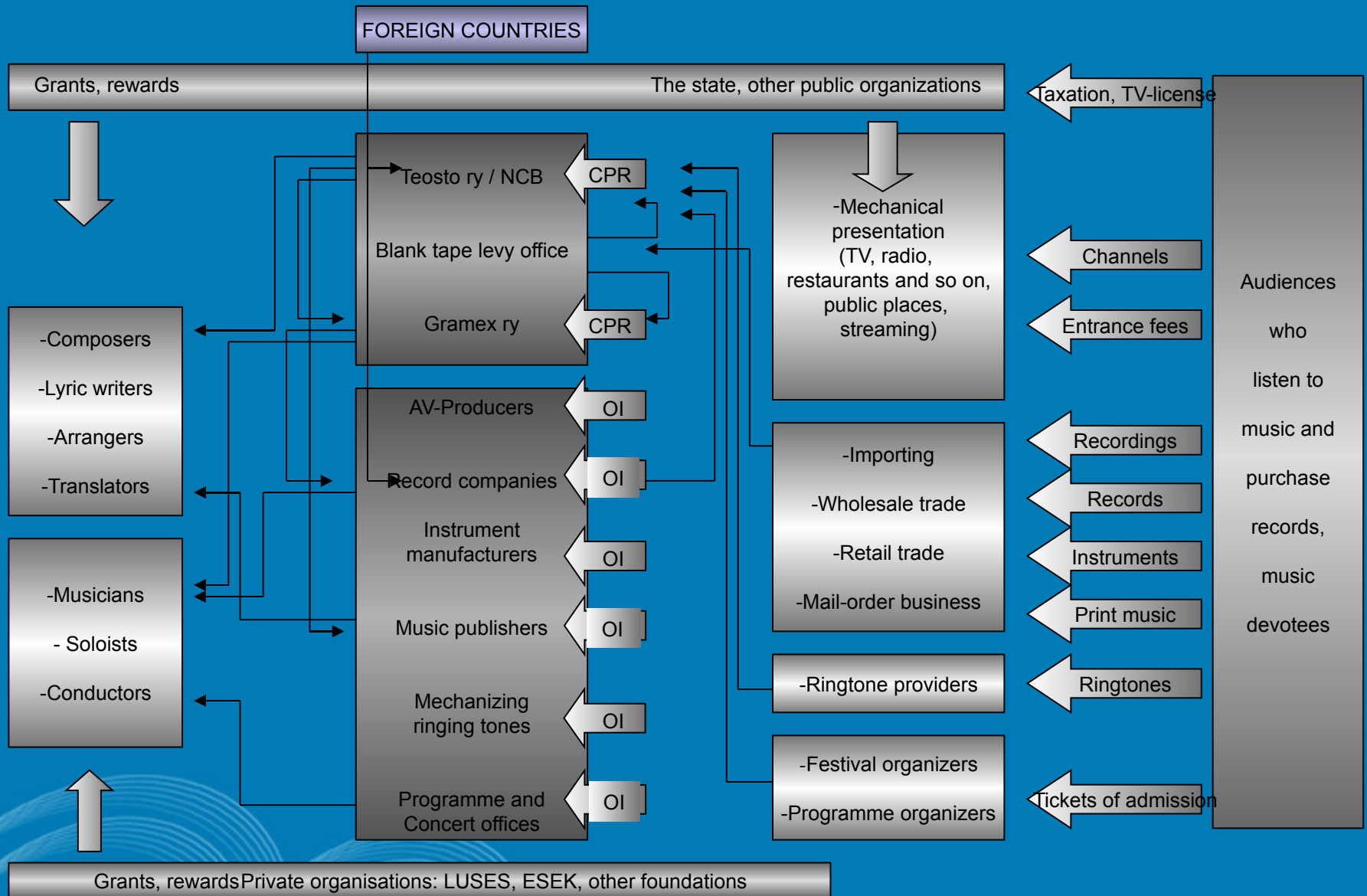
RESEARCH BACKGROUND

- Based on the research model developed by Kim Forss of Andante Consultants
 - The same research model is used in Sweden, Norway and Denmark; the figures are not, however, compatible, since, for example, the Swedish study uses data not included in this study
 - Developments in Finnish exports and their increasing socio-economic significance make it sensible to carry out research annually
 - The report provides the industry with analyses of the structure of exports and tools for further development
- Note!: Quantitative analysis does not measure overall impact
- Previous export research reports in Finland (in English):
 - *Export research 1994 – 1997 (2000)*; The Finnish National Group of IFPI
 - *Anna mulle tähtitaivas – (2003)*; Finnish Composers' Copyright Society Teosto
 - *Behind The Music – Profiting from Sound: A Systems Approach to the Dynamics of the Nordic Music Industry (03/2003)*; Nordic Industrial Fund
 - *Total Market Value and Structure of Finnish Music Exports*
 - ✓ *Year 2001- 2006 (Media Clever, 2003 - 2007)*

WHO IS BEHIND THIS STUDY?

- ❑ Commissioned by Music Export Finland
- ❑ Conducted by Media Clever Oy
- ❑ In collaboration with:
 - ❑ The Finnish National Group of IFPI
 - ❑ Finnish Composers' Copyright Society Teosto
 - ❑ The Finnish Music Publishers' Association
 - ❑ Nordic Copyright Bureau (NCB)
 - ❑ Copyright Society of Performing Artists and Phonogram Producers in Finland Gramex

THE LOGIC OF INCOME IN THE MUSIC INDUSTRY



SOURCES OF EXPORT INCOME

SALES OF GOODS

Record companies

Companies that
manufacture goods
for sale

SALES OF SERVICES

Management work

Booking agencies

Marketing services

Legal services

Public sector

COPYRIGHT ROYALTIES

Finnish Composers'
Copyright Society Teosto

The Finnish Music
Publishers' Association

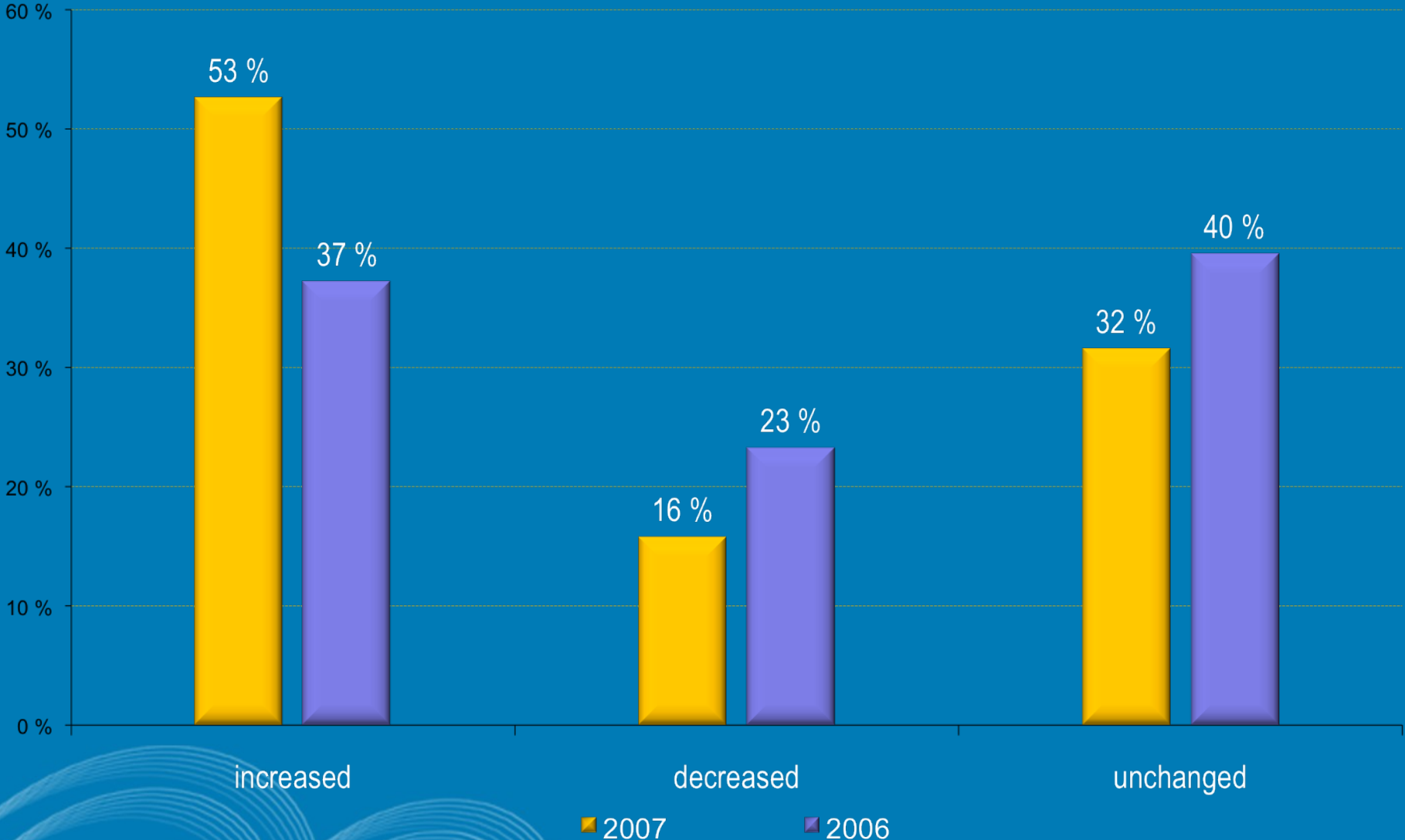
Nordic Copyright Bureau
(NCB)

Copyright Society of
Performing Artists and
Phonogram Producers in
Finland Gramex

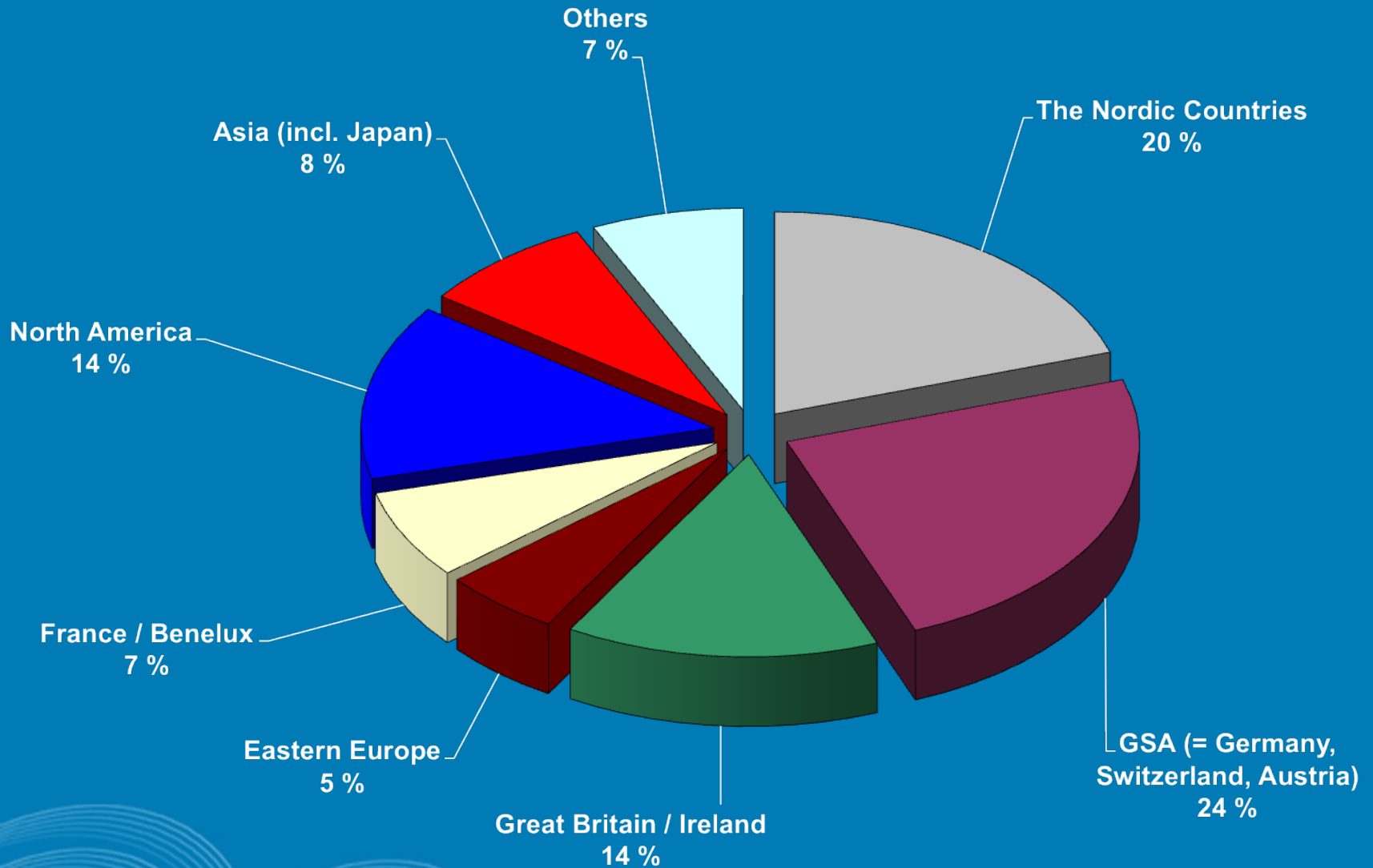
COLLECTING DATA

- ❑ Total of little over 200 question forms were sent out and 49 returned
- ❑ 8 personal interviews were conducted
- ❑ The Finnish National Group of IFPI and the Finnish Music Publishers' Association collected data from their members (IFPI 24, Music Publishers' Association 36)
- ❑ Copyright royalty data was given by the Nordic Copyright Bureau (NCB) and the Copyright Society of Performing Artists and Phonogram Producers in Finland Gramex
- ❑ The figures of the Finnish Composers' Copyright Society Teosto are from their annual report of 2007
- ❑ The research does NOT include:
 - ❑ export activities of sales divisions (wholesalers etc.)
 - ❑ e-commerce (ringtones etc.)
 - ❑ music teaching
 - ❑ music journalism
 - ❑ program sales of radio and TV productions
 - ❑ manufacturing of musical instruments

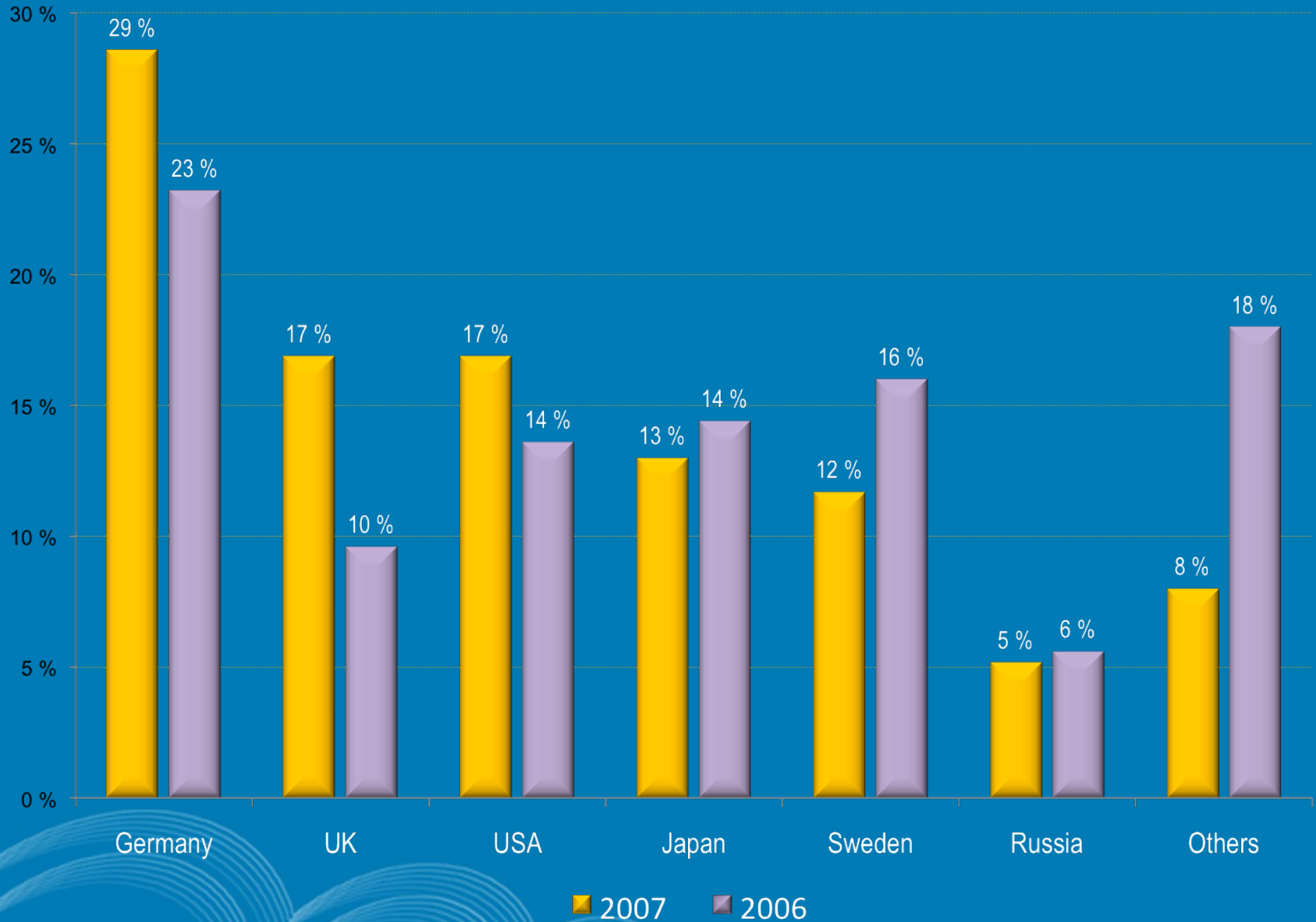
GROSS INCOME FROM MUSIC EXPORTS IN 2007 COMPARED TO 2006, BY COMPANY



EXPORT MARKETS 2007 ALTOGETHER

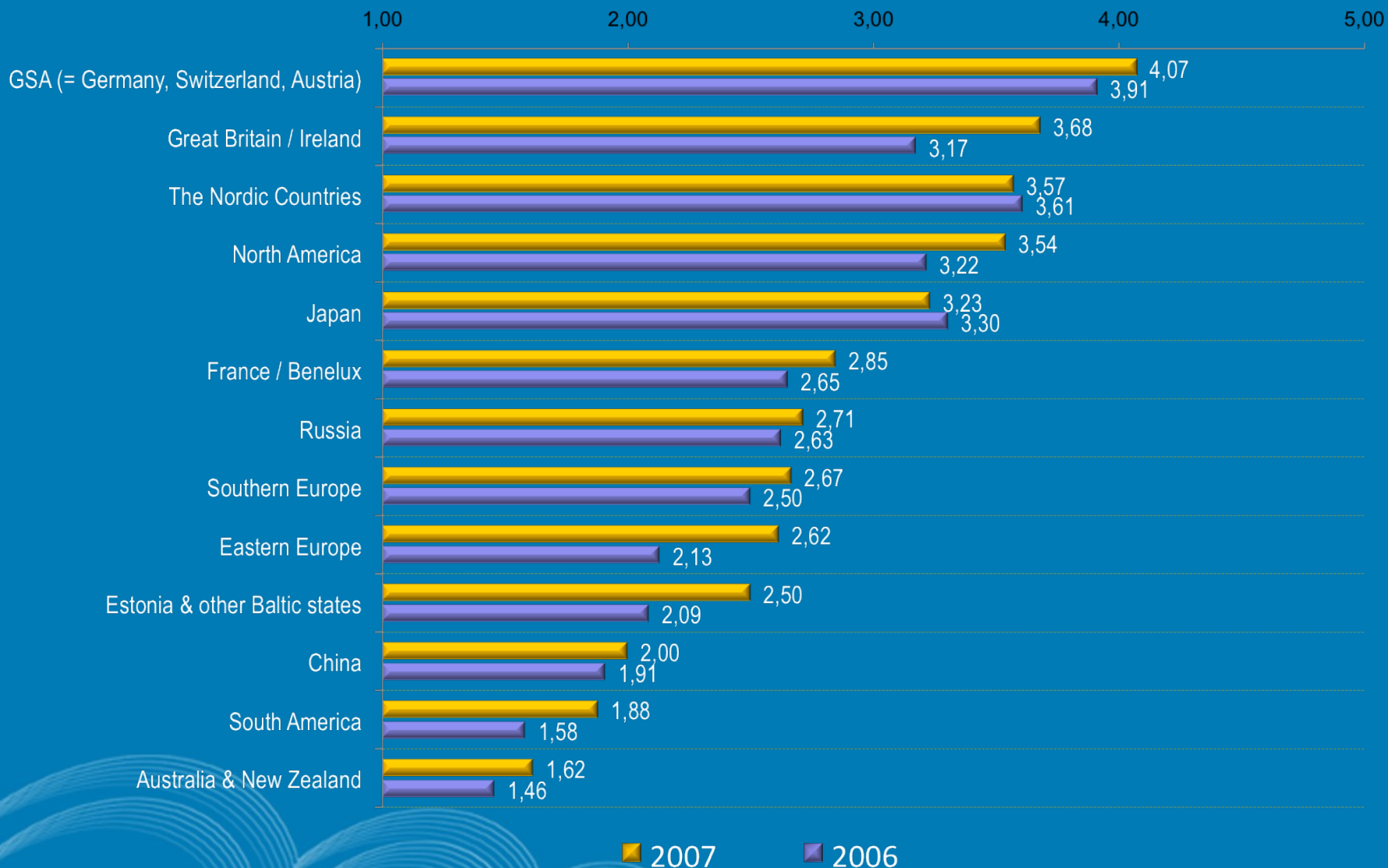


MOST IMPORTANT EXPORT COUNTRIES IN 2007-2006 ACCORDING TO COMPANIES



THE IMPORTANCE OF MUSIC EXPORT AREAS ACCORDING TO COMPANIES

(1=not important... 5=very important)



MARKET VALUE OF FINNISH MUSIC EXPORTS IN 2007

19 816 952 €

DISTRIBUTION OF EXPORT INCOME BY SOURCE

SALES OF GOODS

8 755 466 €

SALES OF SERVICES

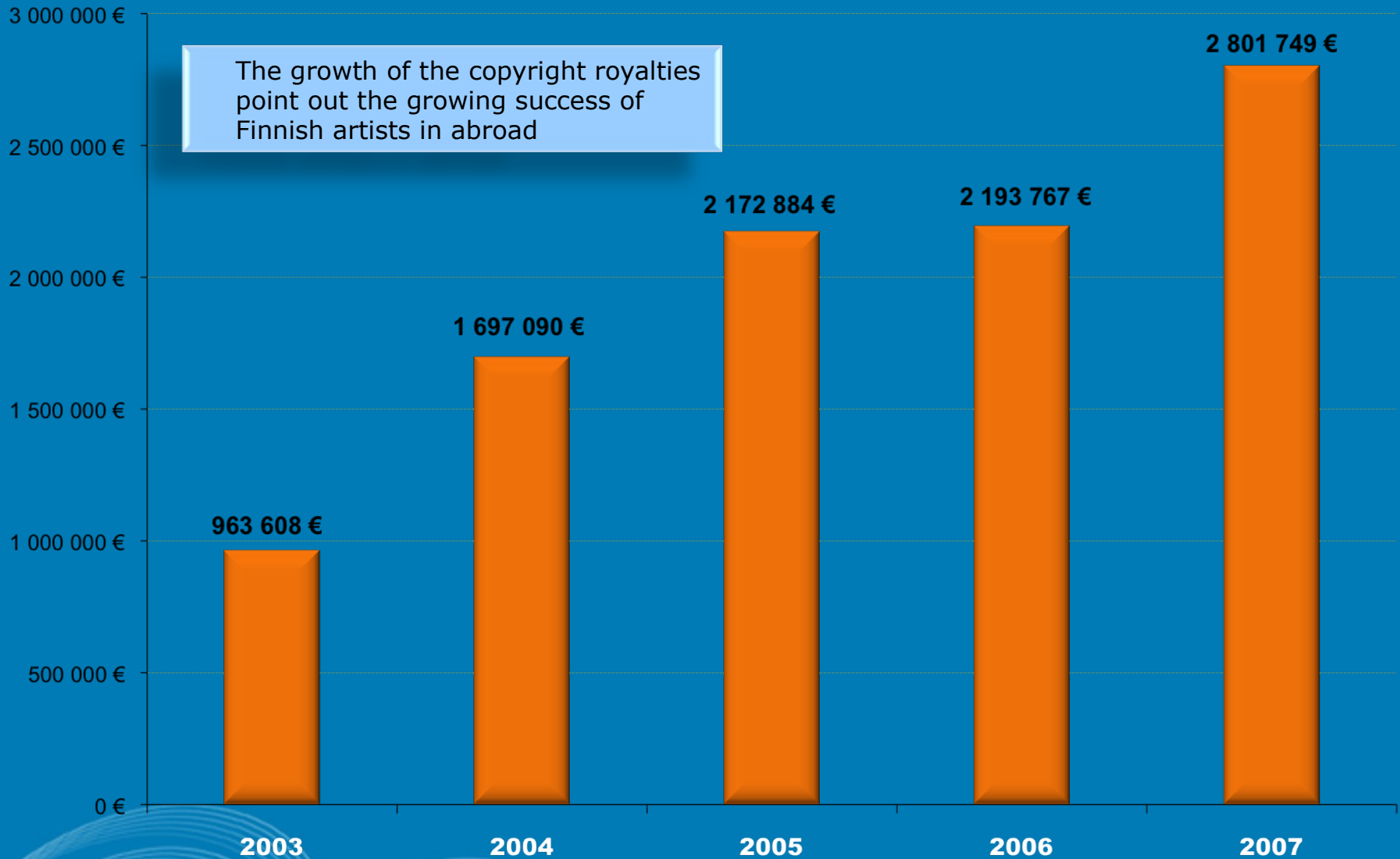
4 925 729 €

COPYRIGHT ROYALTIES

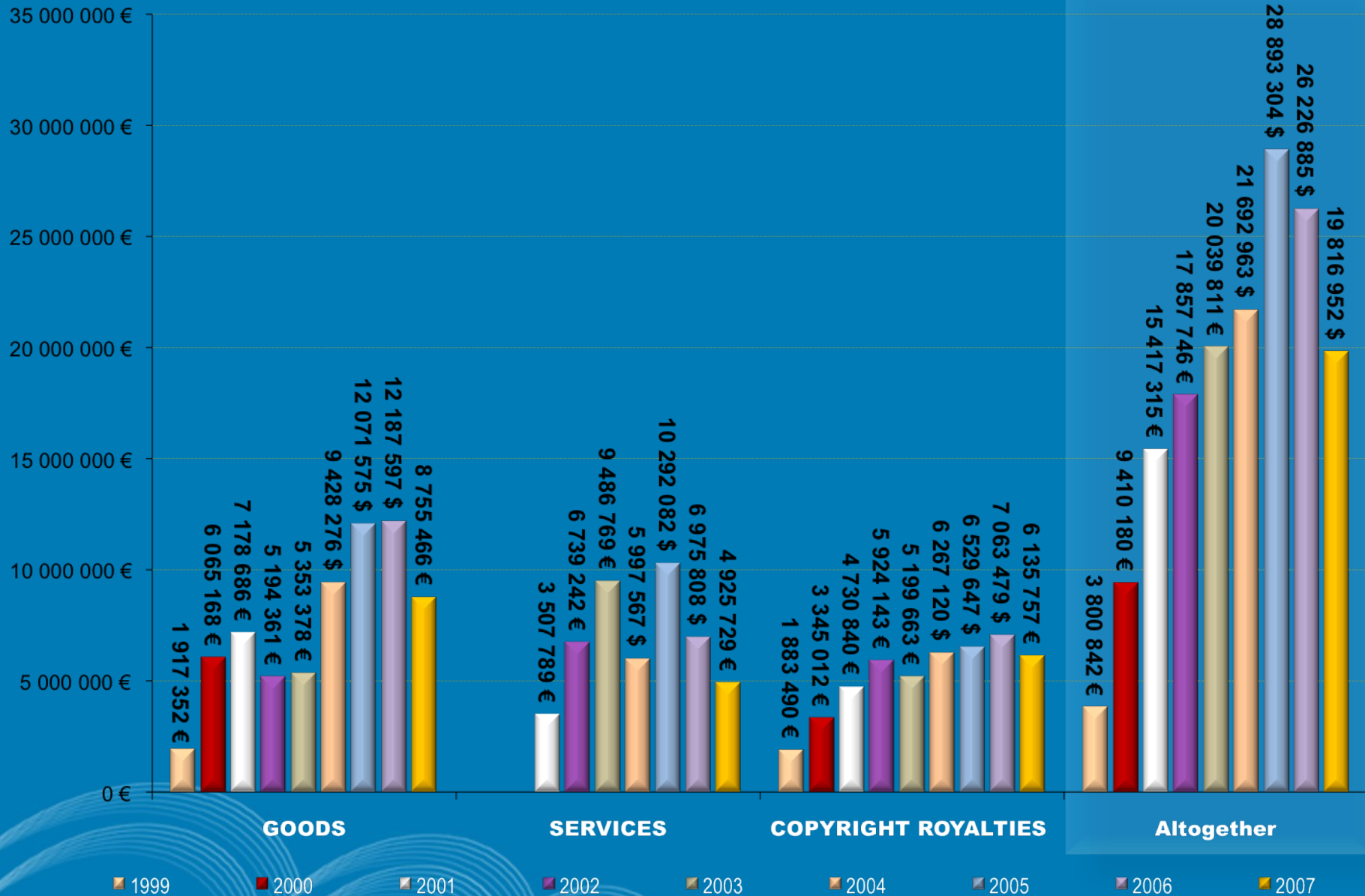
6 135 757 €

COPYRIGHT ROYALTIES 2003-2007

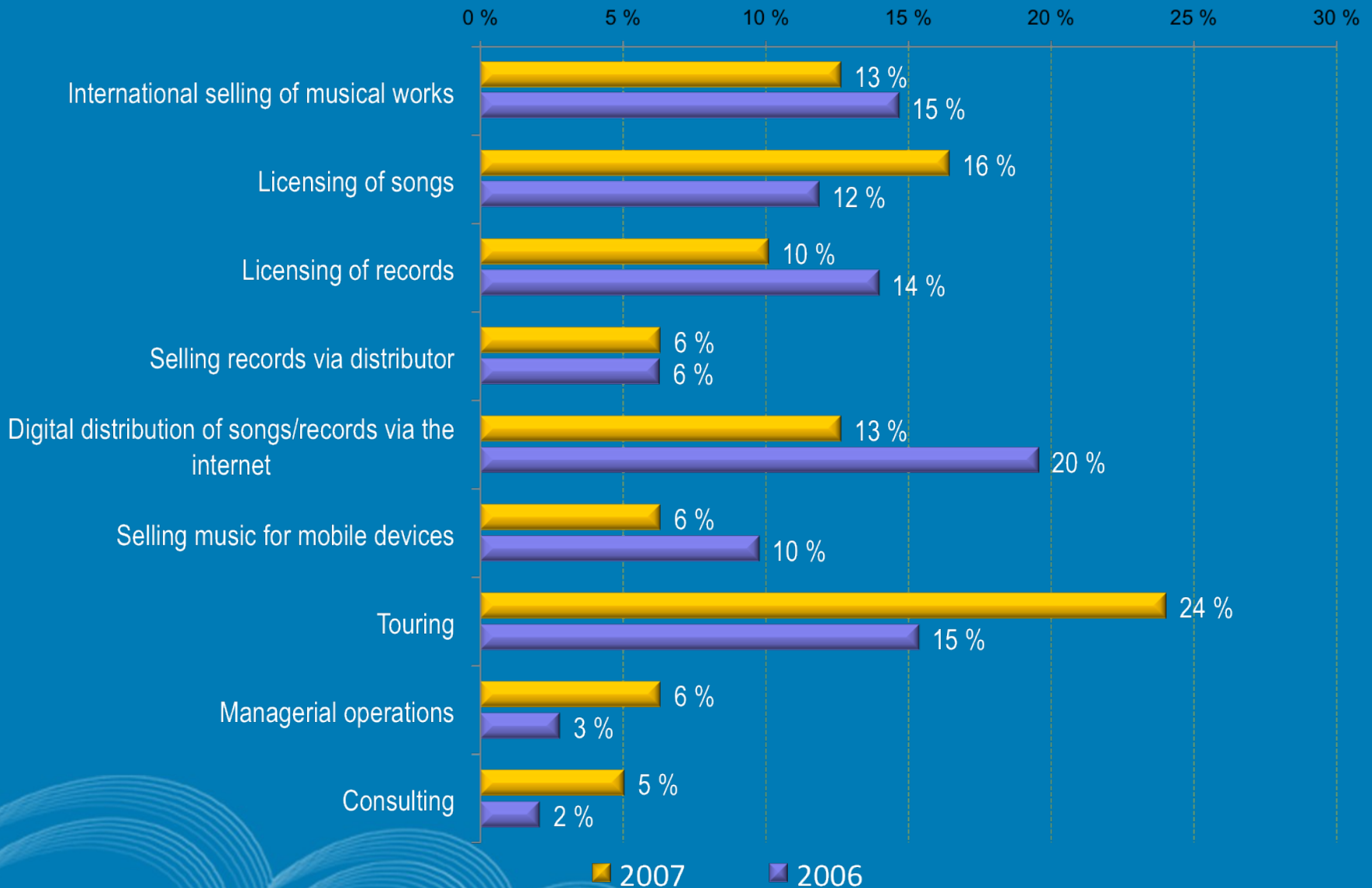
The growth of the copyright royalties point out the growing success of Finnish artists in abroad



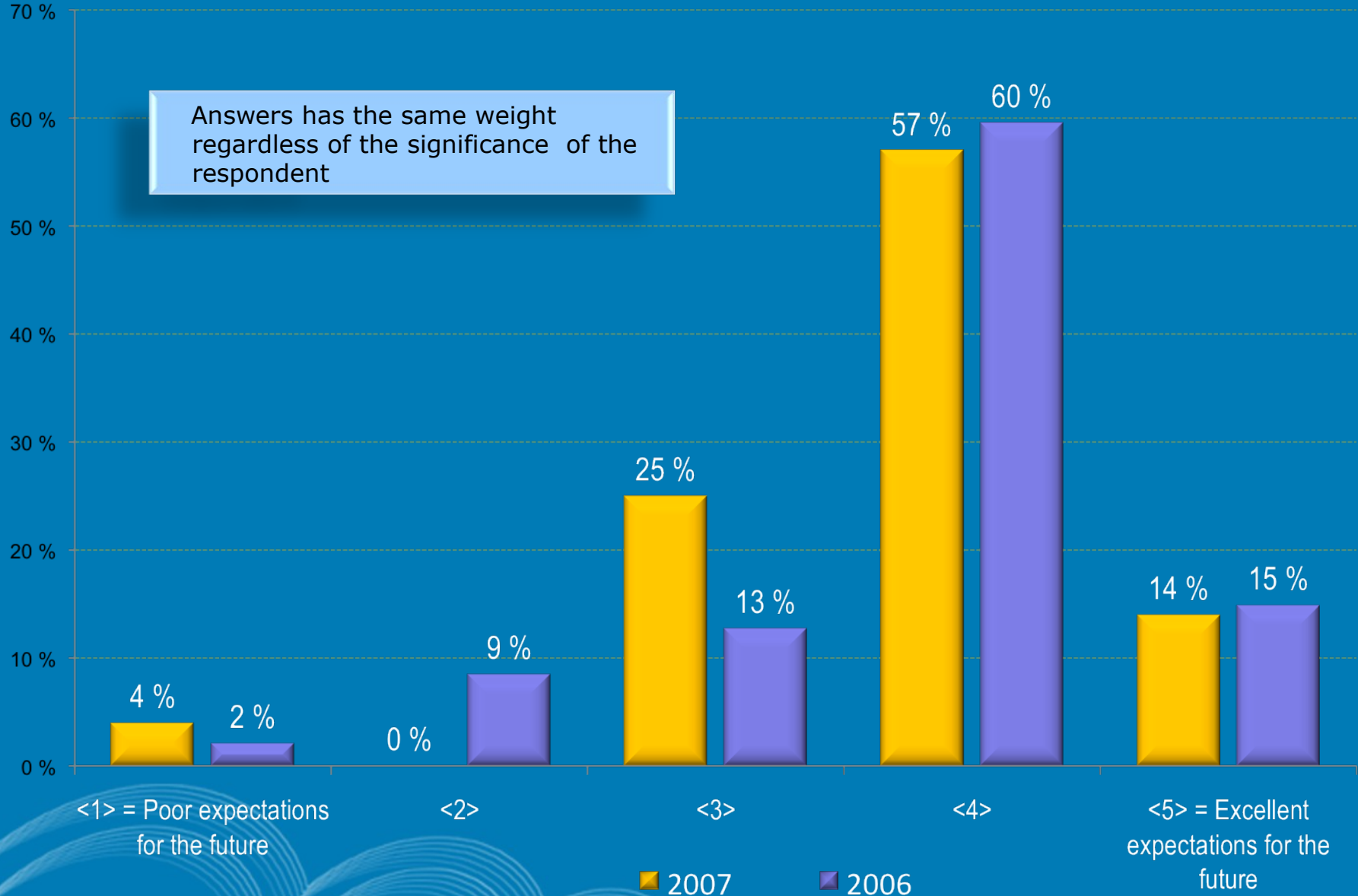
TOTAL MARKET VALUE 1999-2007



WHICH ACTIONS ARE BELIEVED TO BE THE MOST PROFITABLE IN THE FUTURE



FUTURE EXPECTATIONS ACCORDING TO COMPANIES



THE IMPORTANCE OF MUSIC EXPORT IN THE FUTURE

