

UNIVERSAL MUSIC GROUP



F.I.M.I.

Federazione Industria Musicale Italiana

# Lo scenario globale nel 2011



## Global Recorded Music Trade Revenues (US\$ millions)

	2010	2011	% change
Physical	11,142	10,170	-8.7%
Digital	4,840	5,229	+8.0%
Performance rights	862	905	+4.9%
Synchronisation	324	342	+5.7%
<b>Total market</b>	<b>17,168</b>	<b>16,646</b>	<b>-3.0%</b>

Source

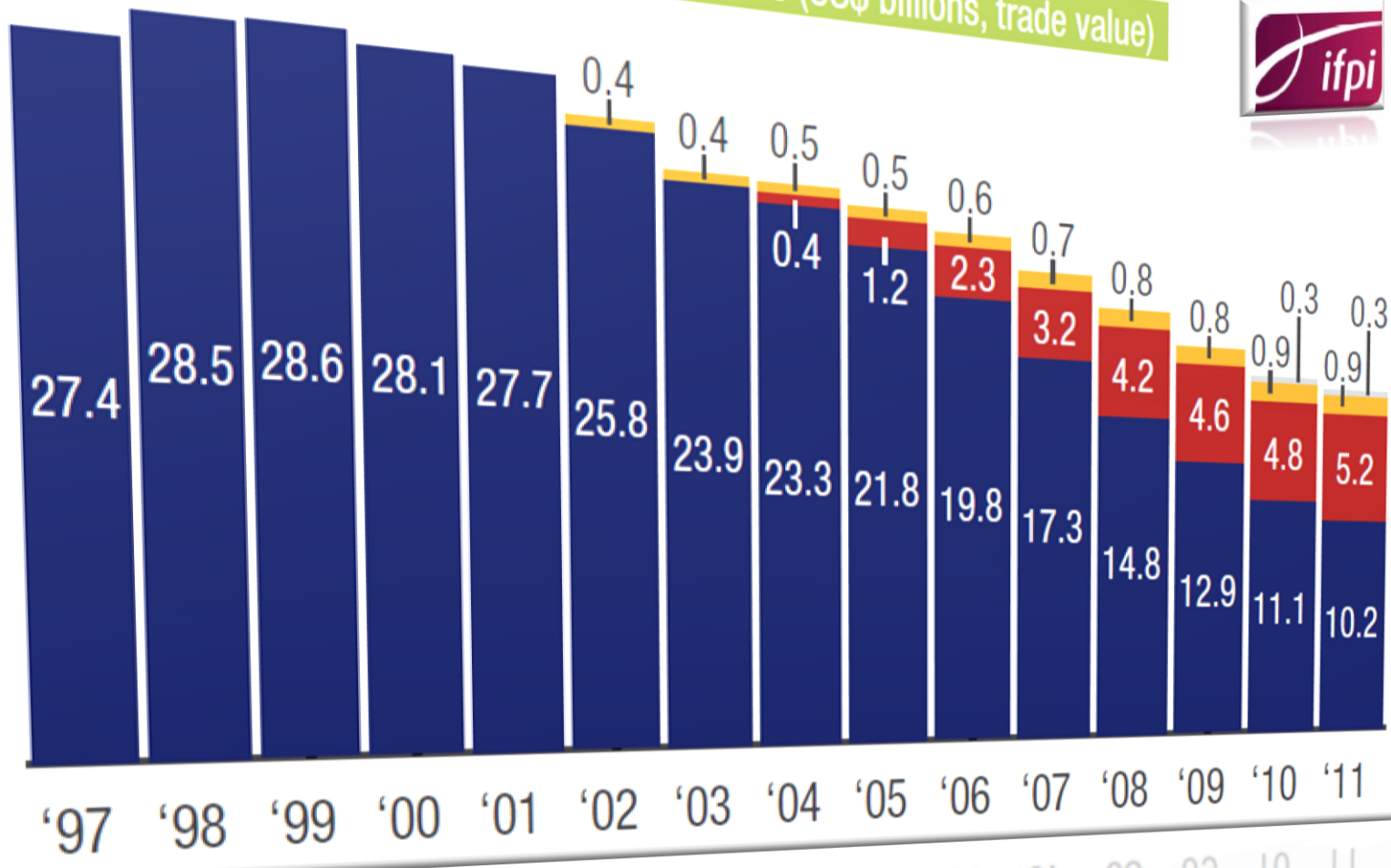


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# La sfida, invertire il trend

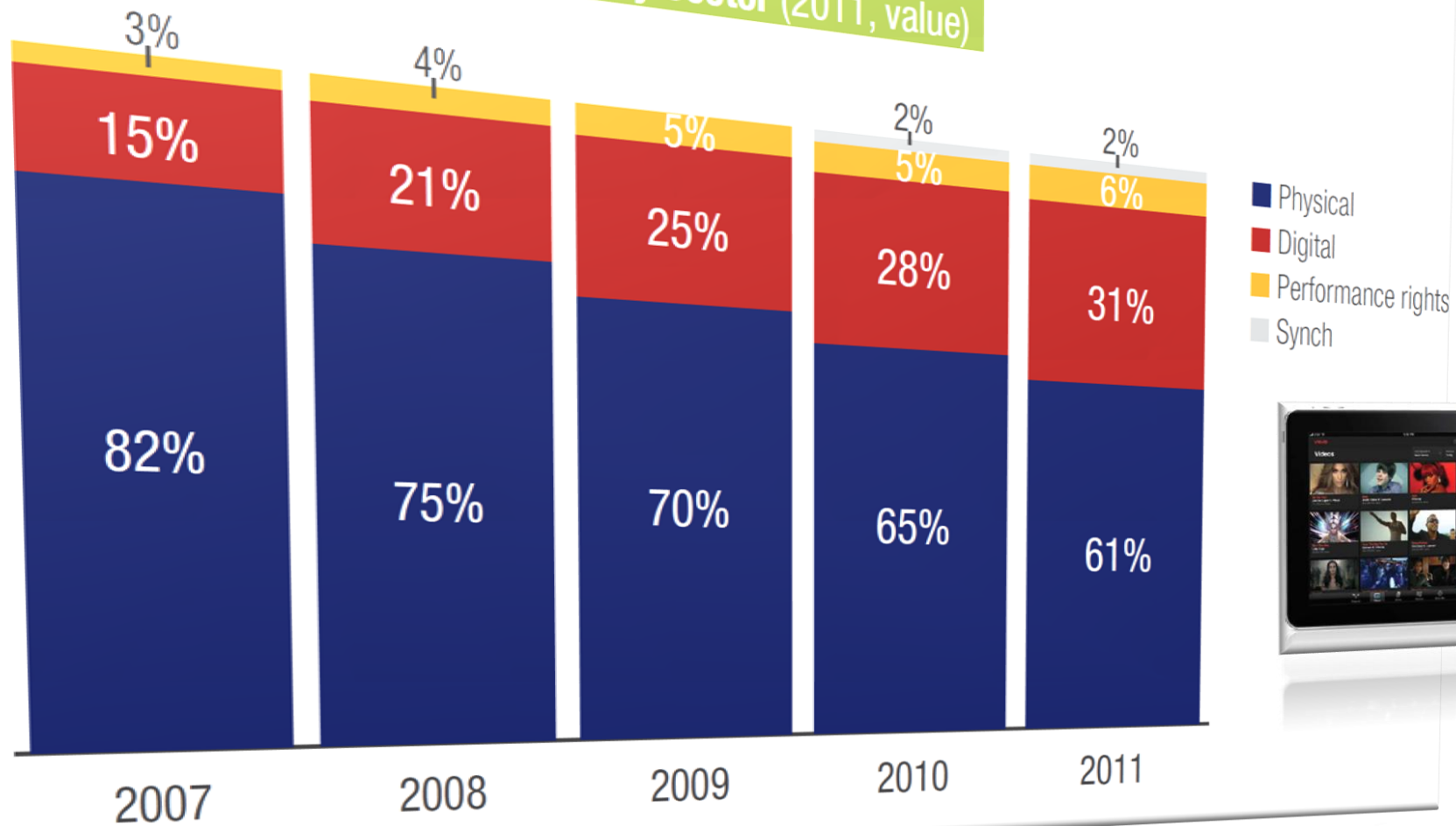
Global Recorded Music Sales 1997-2010 (US\$ billions, trade value)



# Crescono i ricavi diversi

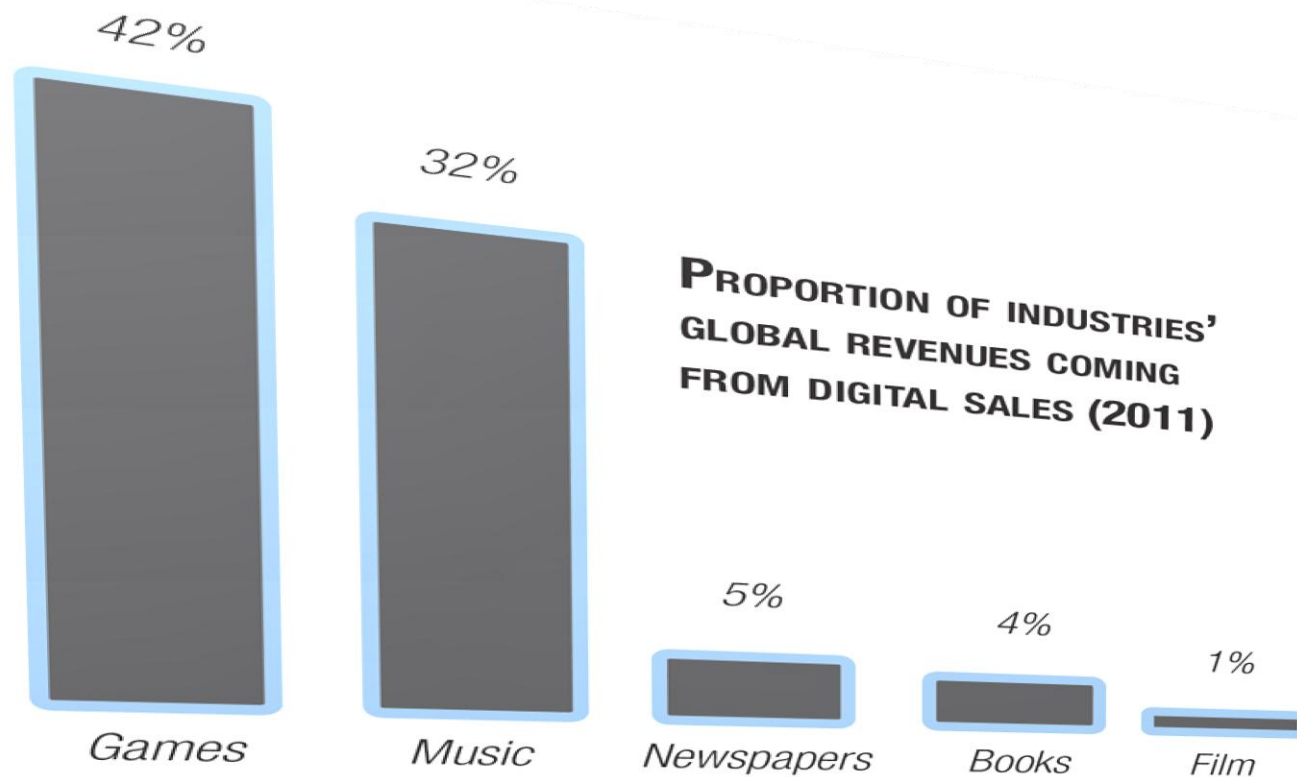


Global Recorded Music Sales by Sector (2011, value)





# L'evoluzione digitale nei media



*Sources: PWC Global Entertainment & Media Outlook and IFPI. Notes: games includes players' purchases of accessories and additional game content as well as subscriptions. Music share is based on trade revenues. Newspapers include digital advertising and subscriptions. Books excludes audio books. Film excludes online sales and rentals of physical discs.*



# ***Il Q1 2012 digitale in Italia***

***Download in crescita del 44 %  
Album digitali + 37%***

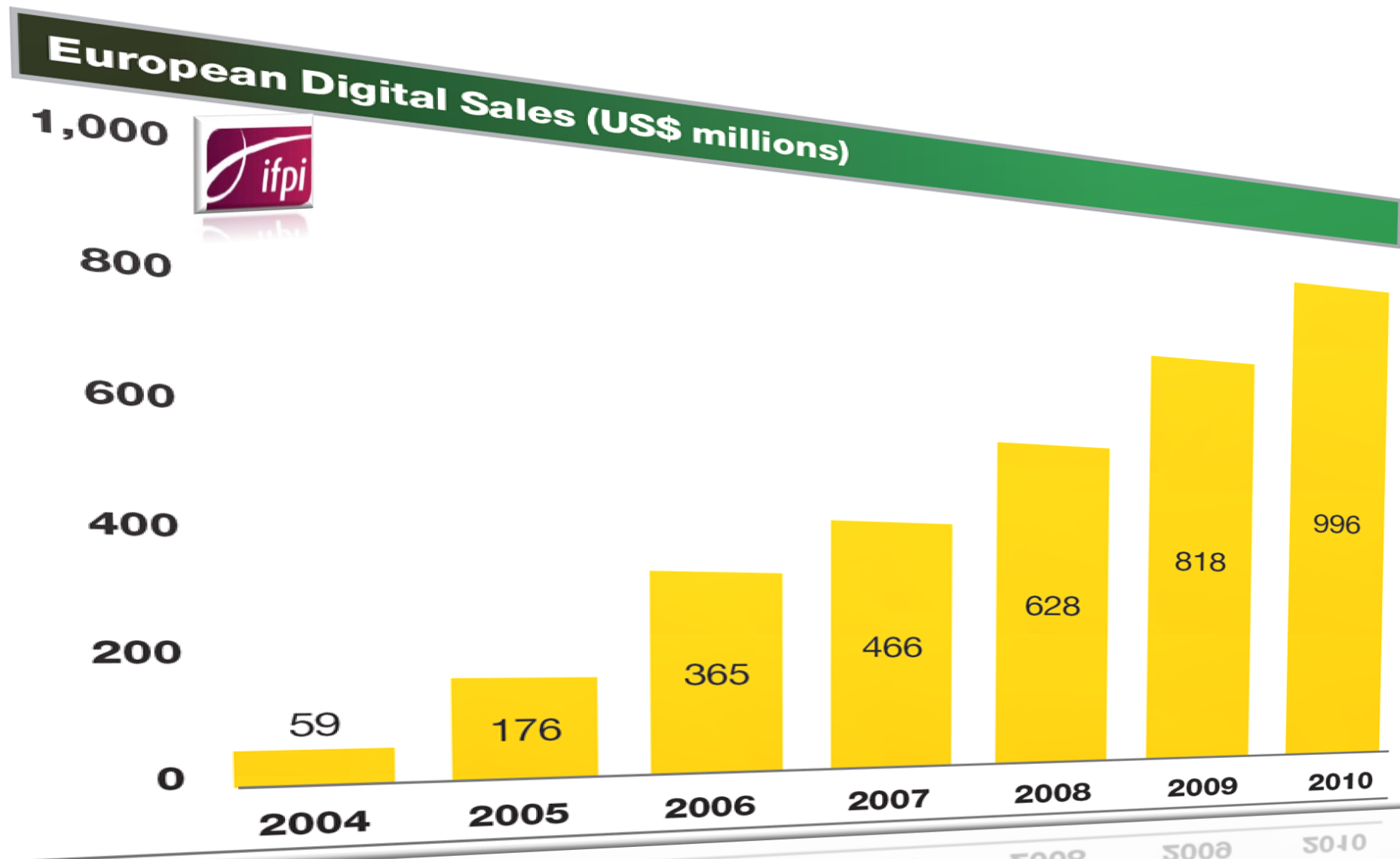
***Streaming in crescita del 117 %***

***Abbonamenti in crescita del 40 %***

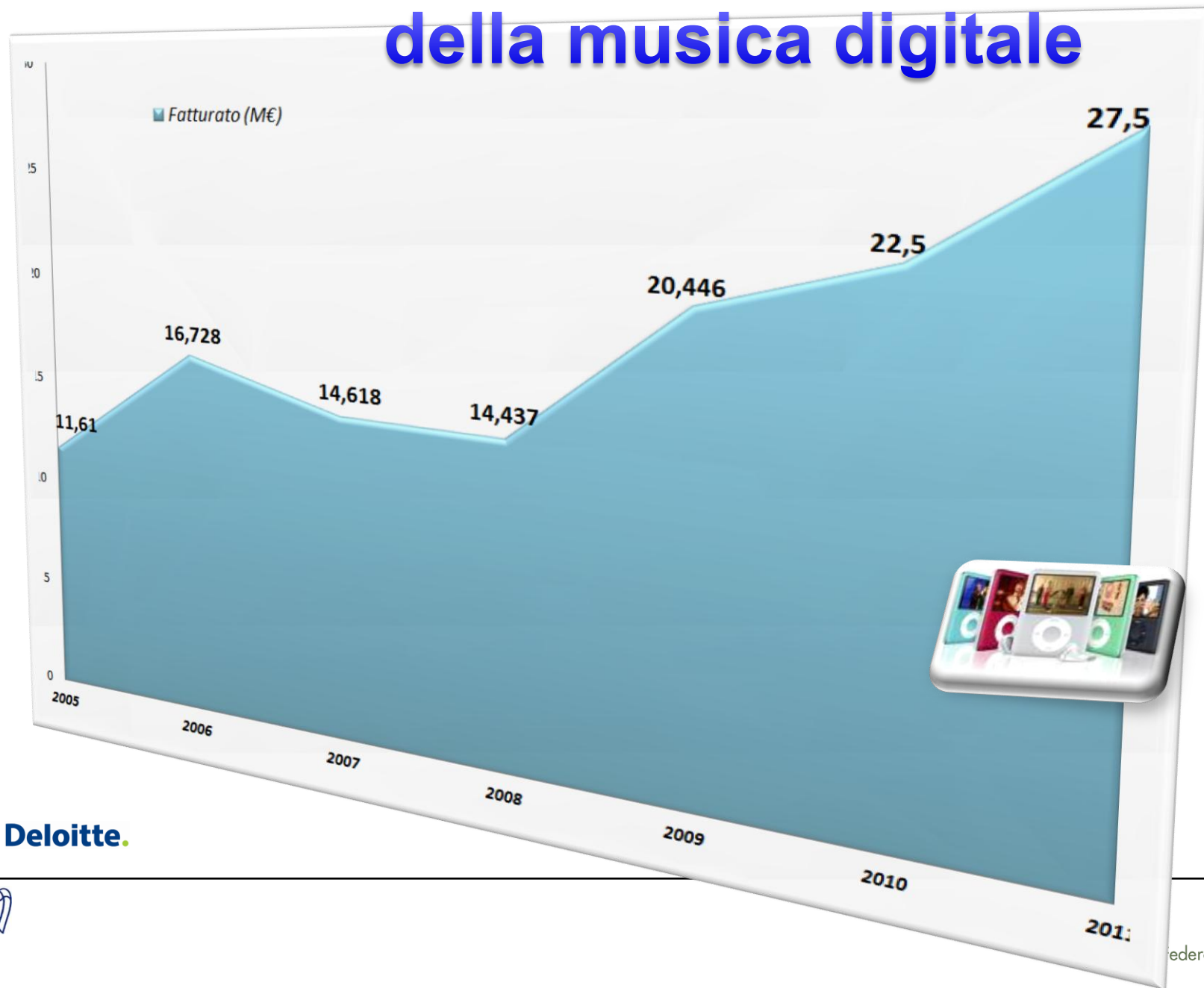
***29 % del mercato***



# Lo sviluppo dinamico del mercato europeo



# L'evoluzione del mercato italiano della musica digitale





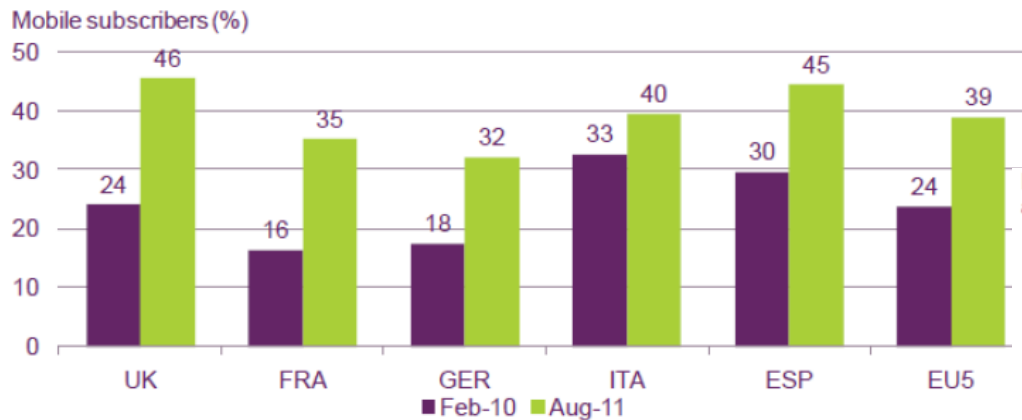
# Download, stream, socialize !



# ...dal possesso all'accesso

## ...mobile e social

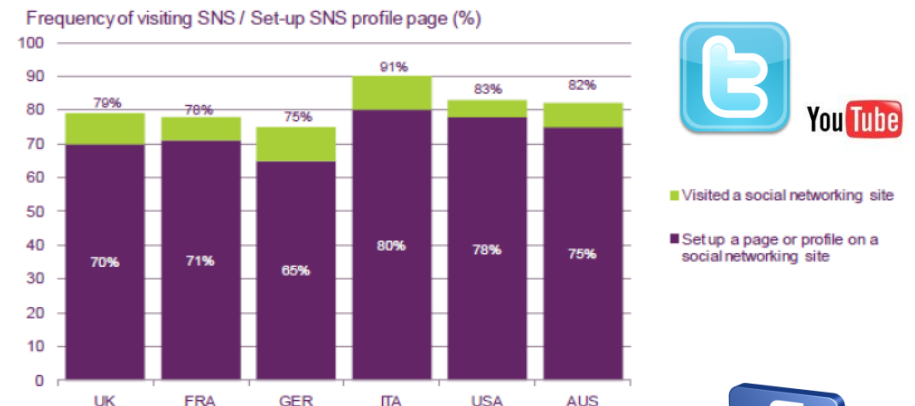
Figure 5.5 Proportion of mobile subscribers with smartphones in Europe



Source: comScore MobiLens, three-month averages ending February 2010 and August 2011, mobile subscribers ages 13+, EU5 is UK, FRA, GER, ITA and ESP



Figure 1.14 Consumers who have ever visited a social networking website and have a social network profile page



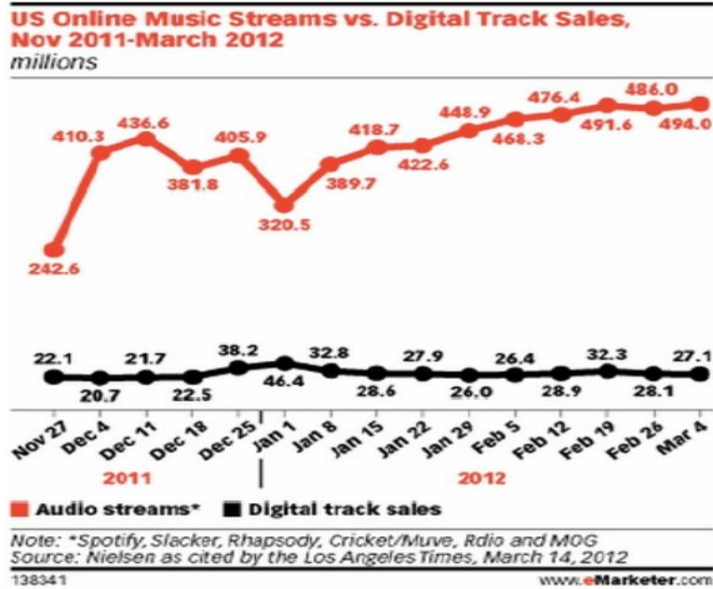


# Mobile in Italia

48 milioni di utenti con 95 milioni di sim

## Conversione verso smartphone

## Streaming 4G





# ...the future of music

