

Statistics on Sound Recordings

EU sound recordings market stagnating in 2000

Richard Deiss

Statistics
in focus

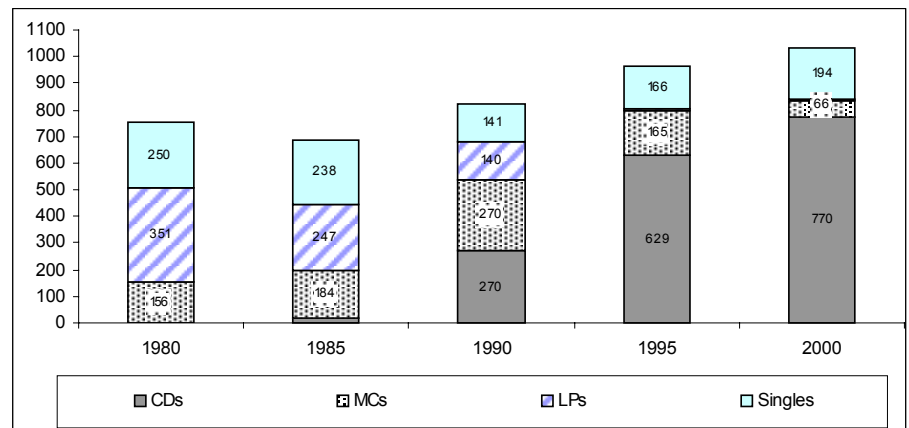
INDUSTRY, TRADE
AND SERVICES

THEME 4 – 18/2002

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Figure 1: Sound recordings by type (mio units) in EU-15



Source: Eurostat

- Sound recordings sales receipts in EU-15 increased by 300% from 1980 to 2000 and stood at 10.6 billion euro in 2000, compared to over 15 billion euro in USA and 7 billion euro in Japan. In 2000 per capita expenditure for sound recordings reached 28.3 euro in EU-15 compared to 55.9 euro in USA and 56.2 euro in Japan.
- The number of sound recordings sold in EU-15 was around 1 035 million units in 2000. In USA 1 061 million units and in Japan 415 million units of sound recordings were sold in 2000.
- According to the International Federation of the Phonographic Industry (IFPI), world sound recordings sales declined by about 1% in units in 2000 and by about 5 % in value and 6.5% in units in 2001.

Table 1: Sound recordings market in 2000

	EU-15	USA	Japan	World
Households with CD player (Mio)	101	100	26	:
- In % of all households	67%	95%	62%	:
Number of sound recordings sold (Mio units)	1035	1061	415	3707
- Sales per Inhabitant (units)	2.8	3.9	3.3	0.6
Receipts from sound recordings sales, billion Euro	10.6	15.2	7.1	40.1
- (%) Domestic	34	92	78	68
- (%) International	60	5	22	28
- (%) Classical	6	3	:	4
Expenditure per inhabitant (Euro)	28.3	55.9	56.2	6.7

Source: IFPI



Household penetration

Table 2: Evolution of household penetration 1999-2001

Number of Households (Mio)	Households with CD player (Mio)	% of households owning a CD player		% of persons having at home:				
				desktop PC	CD-ROM drive	Internet connection		
2000	2000	1999	2000	April 2000	April 2000	April 2000	Oct. 2001	
EU-15	151.7	100.9	60	67	35	25	18	38
B	4.3	2.9	69	67	42	31	20	36
DK	2.3	2.1	84	91	59	54	45	59
D	35.7	28.9	80	81	32	24	14	38
EL	3.7	0.6	15	16	15	7	6	10
E	14.8	6.7	41	45	34	21	10	25
F	23.7	19.4	80	82	29	22	13	30
IRL	1.7	1.3	64	76	28	18	18	48
I	23.0	9.4	37	41	35	23	19	34
L	:	:	:	:	45	44	27	43
NL	6.9	6.4	90	93	66	56	46	64
A	3.4	2.0	55	59	32	27	17	47
P	3.7	2.0	52	54	20	13	8	26
FIN	2.3	1.0	42	43	45	17	28	50
S	4.0	2.8	68	70	56	43	48	61
UK	22.0	15.4	67	70	36	26	24	49
USA	104.9	99.6	79	95	:	:	:	:
Japan	42.4	26.3	62	62	:	:	:	:

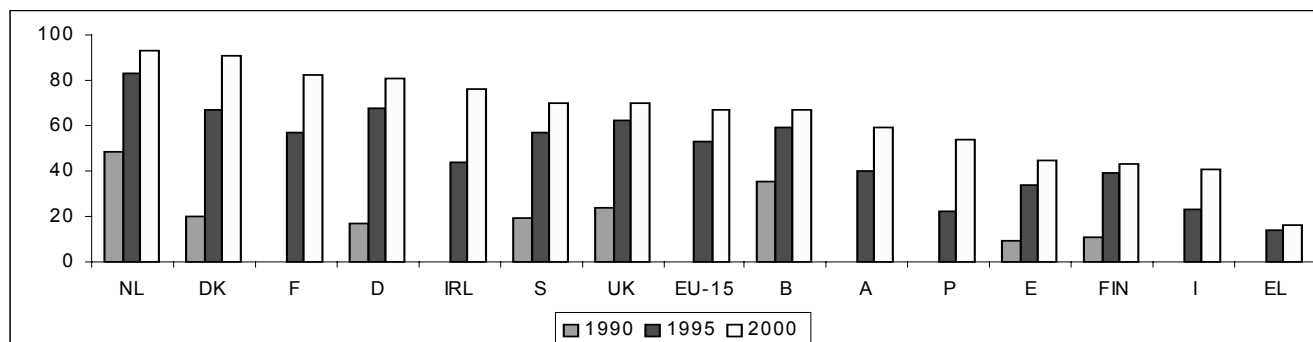
Source: EUROSTAT / AUVIS (Statistics on audiovisual services), IFPI, DG INFSO

In 2000, almost two thirds of the households in the EU had a CD player. The density in Japan was approximately on the same level as in the EU. In the USA, on the other hand, the penetration rate was much higher than in both Japan and the EU in 2000.

A desktop computer with a CD-ROM drive can be used as a CD player. In 2000, 25% of persons in the EU-15 had a PC with a CD-ROM drive at home. With an Internet connection, it is possible to download music files from file sharing organisations. In October 2001, 38% of the EU

population (>15 years) had access to the Internet at home. According to IFPI, mass-scale CD-R copying has had a strong impact on sales world wide.

Figure 2: Evolution of CD-player household penetration 1990-2000 (%)



Source: EUROSTAT / AUVIS, IFPI

Sound recordings market

Table 3: Total receipts from sound recordings by country

	Sound recordings market (CDs,MCs,LPs) (Mio ECU/EUR)						Annual average growth (%)			Exp/person (EUR)
	1980	1985	1990	1995	1999	2000	90/80	00/90	00/99	2000
EU-15	3 101	3 678	6 519	8 512	10 603	10 633	7.7	5.0	0.3	28.3
B	99	90	190	362	321	290	6.7	4.3	-9.7	28.4
DK	49	62	122	234	248	253	9.6	7.6	2.0	47.5
D	982	1 053	1 776	2 498	2 659	2 327	6.1	2.7	-12.5	28.3
EL	36	43	54	100	93	98	4.1	6.1	5.4	9.3
E	168	128	413	429	592	611	9.4	4.0	3.2	15.5
F	370	356	758	1 037	1 861	1 839	7.1	9.3	-1.2	31.1
IRL	20	25	40	60	116	131	7.2	12.6	12.9	34.9
I	212	238	460	450	570	578	8.1	2.3	1.4	10.0
L	:	:	:	:	:	:	:	:	:	:
NL	196	215	506	547	490	494	9.9	-0.2	0.8	31.2
A	56	67	132	315	303	314	9.0	9.0	3.6	38.8
P	33	39	47	107	166	154	3.6	12.6	-7.2	15.4
FIN	49	86	137	110	120	126	10.8	-0.8	5.0	24.4
S	99	147	226	297	335	350	8.6	4.5	4.5	39.5
UK	734	1 130	1 657	1 967	2 729	3 068	8.5	6.4	12.4	51.6
USA	2 774	5 738	5 922	9 251	13 372	15 230	7.9	8.8	13.9 ¹	55.9
Japan	1 033	1 717	2 396	5 883	6 043	7 088	9.9	11.5	17.3 ¹	56.2
World	:	:	:	30 365	36 122	40 091	:	:	11.0 ¹	6.7

¹ Nominal growth in US-dollar: World -4.4%, USA -1.5%, in Yen: Japan -3.9%.

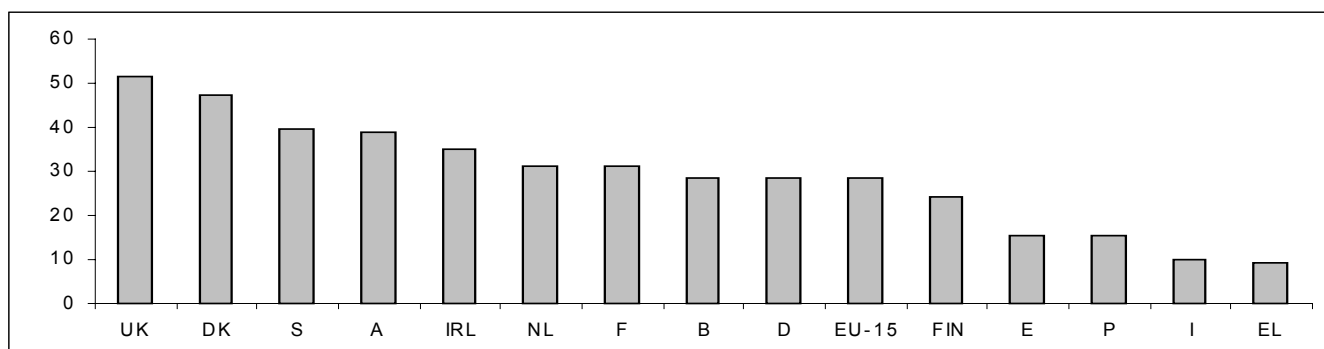
Receipts shown are at current prices and are thus affected by inflation and in some cases by fluctuations in exchange rates

Data relate to retail level value (France: wholesale level) and include taxes (USA: data do not include sales tax).

Source: EUROSTAT / AUVIS, IFPI. Estimated data in Italics

Total receipts in EU-15 grew in nominal terms on average 7.7% per year from 1980 to 1990 and 5% from 1990 to 2000. Receipts have shown a robust growth in both USA and Japan in the last two decades. In the USA the average annual nominal growth from 1980 to 1990 was 7.9% and 8.8% from 1990 to 2000. In Japan the nominal receipts grew on average 9.9% per year from 1980 to 1990 and 11.5% from 1990 to 2000. All EU-15 members had a high annual nominal growth in total receipts during the period 1980 to 1990. However, in most countries, total receipts grew at a lower rate (on average) from 1990 to 2000 except in Greece, France, Ireland, Austria and Portugal.

Figure 3: Expenditure on sound recordings per inhabitant (euro), 2000



Source: EUROSTAT / AUVIS, IFPI

Total receipts by music origin

Table 4: Estimated sales value by music origin in EU-15, 1998-2000 (%)

	1998			1999			2000		
	DOM	INT	CLA	DOM	INT	CLA	DOM	INT	CLA
EU15	35	58	7	42	51	7	34	60	6
B	20	72 *	9	17	76	7	17	78	5
DK	32	60	8	35	59	6	31	65	4
D	43	47	10	43	47	10	40	52	8
EL	59	37	4	56	40	4	54	42	4
E	42	51	7	32	61	7	39	55	6
F	44	47	10	53	39	7	51	42	7
IRL	16	79	5	13	85	2	26	72	2
I	43	51	6	43	52	5	36	59	4
NL	27	64	9	23	69	8	26	63	11
A	15	74	12	15	73	12	13	77	10
P	31	65 *	4	24	67	9	21	73	6
FIN	42	48	10	41	50	8	38	53	9
S	25	71	4	36	61	3	30	67	3
UK	48	48	4	49	46	6	51	41	8
USA	91	5	4	92	5	3	92	5	3
Japan	78	22	:	77	23	:	78	22	:
World	64	30	6	66	29	5	68	28	4

Source: IFPI. *: International and regional music together. Domestic (DOM) International (INT) Classical (CLA) music origin.

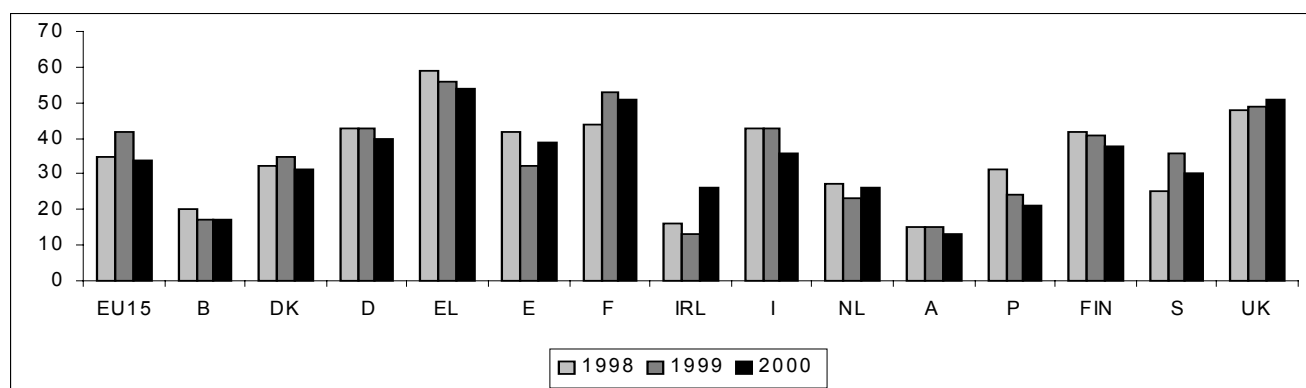
According to IFPI, domestic repertory (recordings by domestic artists and acts signed to local music labels) shares increased by approximately 5% in Europe during the last decade. However, the share of local repertory in total sales value in EU-15 decreased from 42% in

1999 to 34% in 2000. Domestic music had the highest market shares in Greece, France and UK, while Belgium and Austria had the lowest share of domestic music. Non classical music from other countries accounted for 51% of the market in 1999 and 60% in 2000.

Classical music had a market share of about 6% in the EU-15.

Multi-artist products are excluded in the IFPI figures on the percentage of sales by music origin. Results therefore should be interpreted with care.

Figure 4: Share of domestic music by country



Source: IFPI

Sales by type of sound recordings

Table 5: Number of sound recordings sold (mio units)

	Total Sound recordings sold (Mio units)							Growth (%)	Sales per inhabitant (units)		Share of CDs % CD albums only	
	1980	1990	1995	1997	1998	1999	2000		00/99	1999	2000	2000
EU-15	754	821	966	1 046	1 055	1 030	1 035	0.5	2.7	2.8	74.4	93.1
Of which:												
MCs	156	270	165	123	110	83	66	- 20.9	0.2	0.2	-	-
LPs	351	140	6	4	4	4	5	31.6	0.0	0.0	-	-
CDs	-	270	629	705	732	732	770	5.2	2.0	2.0	-	-
Singles	247	141	166	214	210	211	194	- 8.0	0.6	0.5	-	-
Minidisc	-	-	-	-	-	1	1	-	0.0	0.0	-	-
B	25	21	24	27	31	31	29	- 5.5	3.0	2.9	71.2	99.5
DK	9	10	16	19	19	19	20	6.8	3.6	3.8	91.6	99.0
D	198	222	284	294	291	290	282	- 2.9	3.5	3.4	72.8	92.3
EL	9	9	8	8	10	8	9	8.3	0.8	0.9	82.3	95.5
E	51	51	53	59	65	65	71	9.8	1.6	1.8	85.0	87.6
F	140	132	150	164	165	158	158	- 0.1	2.7	2.7	70.0	94.1
IRL	:	:	7	8	9	10	11	16.0	2.6	2.9	72.5	92.5
I	60	57	45	60	53	54	48	- 10.7	0.9	0.8	73.1	81.4
L	:	:	:	:	:	:	:	:	:	:	:	:
NL	46	47	44	46	41	39	40	1.3	2.5	2.5	85.4	98.9
A	12	14	22	24	23	22	23	4.3	2.8	2.9	81.6	97.4
P	9	6	12	15	20	17	17	0.0	1.7	1.7	72.6	77.4
FIN	10	16	10	11	12	11	12	3.2	2.2	2.3	90.6	95.6
S	15	27	27	26	28	29	32	11.2	3.2	3.6	81.3	98.9
UK	171	210	267	285	290	278	283	1.6	4.7	4.7	71.3	94.7
USA	684	857	1 120	1 045	1 096	1 135	1 061	- 6.5	4.2	3.9	88.9	92.6
Japan	220	237	427	462	454	408	415	1.7	3.2	3.3	67.0	97.0
World	:	:	3 648	3 833	3 768	3 751	3 707	- 1.2	0.6	0.6	67.7	78.0

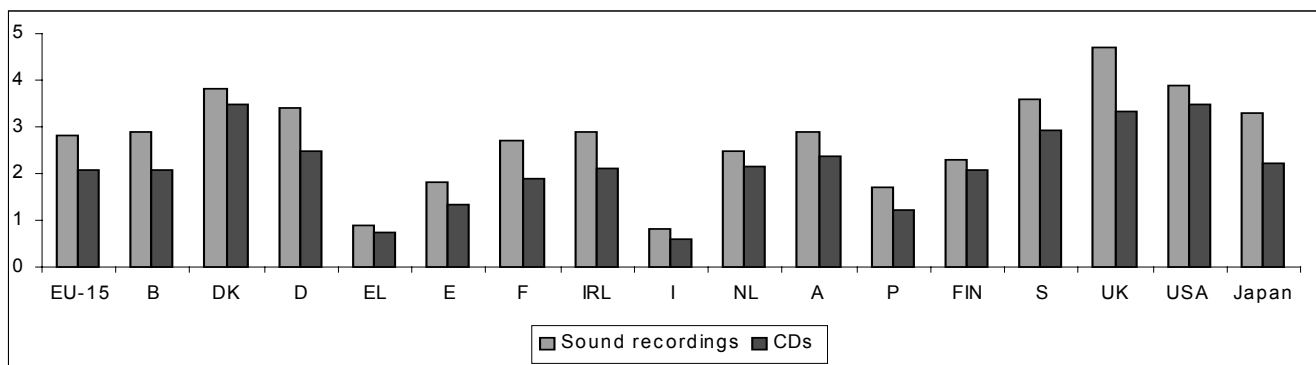
Source: EUROSTAT / AUVIS, IFPI. Singles represent vinyl, CDs and MCs

In 2000 over 1 billion sound recordings were sold in EU of which 74% were CD albums and 19% CD singles. The UK was the country with the highest sales per capita, while Italy and Greece had the lowest sales per person. The

number of sound recordings sold grew from 1980 to 1990 by 8.8% in EU-15, 25.3% in USA and 7.8 in Japan. From 1990 to 2000, the increase was 26% in EU-15, 23.8% in USA and 75.1% in Japan. However, in 2000 the EU-15 market

stagnated. Among the EU members, Ireland and Sweden had the highest growth in 2000, while in Belgium, Germany, France and Italy fewer units of sound recordings were sold in 2000 compared to 1999.

Figure 5: Number of sound recordings and CDs sold per inhabitant, 2000



Source: IFPI

Candidate countries

Table 6: Sound recordings market in candidate countries (CC), 1999-2000

	Total receipts (Mio EUR)		Expenditure per inhabitant (EUR)	% sales by type of music			Total sales (Mio units)		% sales by format		Sales per in- habitant (units)
	1999	2000		2000			1999	2000	2000		
				DOM	INT	CLA			MCs	CDs	
CC Total	510.5	508.9	3.0	52	45	3	115.9	112.5	52	48	0.7
Bulgaria	3.6	5.0	0.6	72	28	:	1.6	2.0	84	16	0.2
Cyprus	19.0	18.2	22.8	61	39	:	1.0	1.0	10	90	1.3
Czech Republic	54.5	43.8	4.3	43	48	9	7.1	6.9	30	70	0.7
Estonia	6.9	7.3	5.2	23	77	:	0.7	0.8	50	50	0.6
Hungary	62.5	61.7	6.2	65	28	7	7.3	7.5	45	55	0.8
Latvia	4.5	6.7	2.8	48	52	:	1.3	0.8	62	38	0.3
Lithuania	3.1	4.0	1.1	57	43	:	0.7	1.3	42	58	0.3
Malta	:	:	:	:	:	:	:	:	:	:	:
Poland	165.1	169.4	4.4	27	63	9	39.7	34.4	41	59	0.9
Romania	12.7	32.0	1.4	73	27	:	4.2	15.8	99	1	0.7
Slovakia	13.5	10.5	1.9	31	65	5	1.9	1.6	37	63	0.3
Slovenia	22.7	19.5	9.8	:	:	:	1.5	1.7	35	65	0.9
Turkey	142.4	130.8	2.0	77	23	:	48.9	38.7	87	13	0.6
EU-15	10603	10633	28.3	34	60	6	1030	1035	6	74	2.8

Source: IFPI ; 2000 EUR exchange rate

The development of the sound recordings market in the candidate countries was very heterogeneous in 2000 (as a consequence of exchange rate fluctuation, results in value terms have to be interpreted with caution). In total receipts, Poland and Turkey were the largest markets of the Candidate Countries in 2000, while Bulgaria and Lithuania were the smallest.

highest expenditure per inhabitant in 2000, while Bulgaria and Lithuania show the lowest. The CC average in 2000 was 3.0 euro per inhabitant.

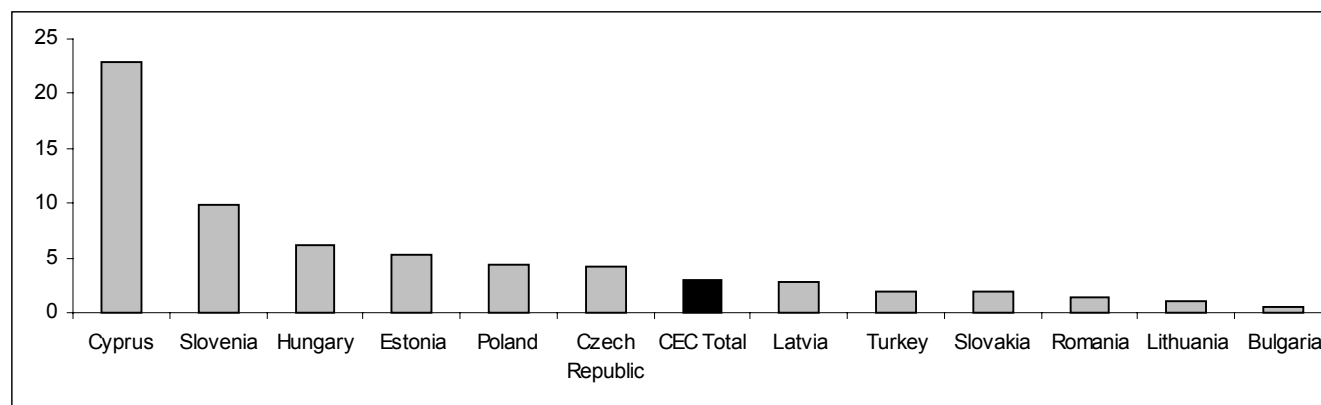
In 2000, domestic music had the highest market share in Turkey and Romania, while in Slovakia it had the lowest. Classical music is not shown separately in most of the countries.

nearly half of sound recordings sales in Candidate countries (by value 62%). The market share of CDs was highest in Cyprus, while Romania and Turkey led in terms of the market share of MCs in 2000.

Cyprus, Slovenia and Poland showed the highest number of sound recordings sold per inhabitant in 2000 among Candidate Countries (no data available for Malta).

Cyprus and Slovenia show the In units CDs represented in 2000

Figure 6: Expenditure per inhabitant (euro), 2000



Source: IFPI, 2000 EUR exchange rate

➤ ESSENTIAL INFORMATION – METHODOLOGICAL NOTES

Total receipts from sound recordings sales: of equipment

Total receipts from selling sound recordings to the general public. Includes total receipts from singles, vinyl records (LPs), audiocassettes (MCs) and digitally encoded laser disc (CDs)

Total number of sound recordings sold: Total number of sound recording units of whatever format sold to the general public.

Household penetration: % of household owning a certain type

Number of singles sold: Total number of “short play” sound recordings (singles) in whatever format sold to the general public. It includes all kinds of singles: vinyl records singles, cassette singles, and Compact Disc singles.

Number of LPs sold: Number of sound recording albums on “Long Play” vinyl records (LPs) sold to the general public.

Number of MCs sold: Number of sound recording albums on audiocassette (MCs) sold to the general public. For recent years, may include digital compact cassettes (DCCs).

Number of CDs sold: Number of sound recording albums on digital encoded laser disc (CDs) sold to the general public. For recent years, may include mini discs (MDs). Excludes CD singles.

Abbreviations:

: Data not available

Mio Million

LPs Albums on “Long Play” vinyl records

CDs Albums on compact discs

MCs Albums on audiocassette records

Singles “Short play” sound recordings in whatever format.

DOM Domestic (National) music

INT International music (non classical music from other countries).

CLA Classical music

Sources:

AUVIS Eurostat enquiry and database on audio-visual services. The AUVIS questionnaire is sent out each year to national statistical institutions to collect existing structural and functional data on the audio-visual sector.

DG INFSO Directorate General Information Society of the European Commission
http://europa.eu.int/information_society/eeurope/benchmarking
Eurobarometer survey 103 of June 2001 and 112 of December 2001 for Internet connection data
Eurobarometer survey 53 of April 2000 for computer penetration data

IFPI International Federation of the Phonographic Industry
IFPI provides statistical data and articles about the music industry.
Address: 54 Regent Street. London W1B 5RE United Kingdom.
<http://www.ifpi.org>

Further information:

➤ Reference publications

Title Statistics on Audiovisual Services - Data 1980-1999
 Catalogue No KS-40-01-351-EN-C Price EUR 17.50

➤ Databases

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