

TECHNOLOGY

is

Culture



About

Technology is Culture is an initiative of EDiMA, the European trade association representing online platforms and other innovative tech companies.



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Introduction

The online environment continues to offer a multitude of opportunities to the creative sectors and the online environment should be considered a cornerstone of the success of the creative industries in Europe and beyond today.

Online driving cultural diversity

A BROADER DIVERSITY OF RICH CREATIVE CONTENT IS BEING PRODUCED, DISCOVERED, AND CONSUMED NOW MORE THAN EVER BEFORE

In the end, the online subscription model will be much more remunerating for everyone

GUILLAUME LEBLANC,
HEAD OF SNEP



560,000

The number of books published in Europe grew by close to 80% between 1995 and 2011¹. More than 560,000 book titles were released in 2013, up by 45,000 compared to 2009, while the active catalogue of titles more than doubled in the same period².



1,600

The number of feature fiction movies and documentaries has also increased between 2010 and 2014 in the EU. Last year saw the release of over 1,600 feature films, up from 1,499 in 2010, and European films' market share in EU box offices reached a record high of 33.6% in that year (highest since 1996)³.

The production of music albums is increasing – rising 54.7% between 1998 and 2006 in Germany⁴; or, for French speaking albums, by 18% between 2009 and 2014⁵.



35 billion

In less than 10 years, digital music downloads on iTunes went from zero to 35 billion songs sold⁶.

Indila, a Parisian singer/songwriter who sings in French, had 66% of her listeners abroad in 2014⁷.



1,5 billion

On YouTube, when it comes to videos from France, Italy, Germany and Spain, watch time from other European countries is over 1.5 billion hours. Globally, videos from Europe account for a quarter of global watch time on YouTube (2015).



80%

In Denmark, France, Spain and the Netherlands, local artists account for 80% of the Top 10 albums, and close to 90% in Sweden and Italy⁸.

The number of releases by independent labels in the US now exceeds releases by major labels by a factor of two.



1,000

There are more artists achieving success than ever before: the number of different artists per year featuring in the Billboard Top 200 has increased from about 600 in 1999 to 1,000 artists in 2010, a 67% increase⁹.

Klangkarussell, an Austrian dance music duo, had 98% of their listeners on Spotify outside their domestic market.

ONLINE IS DRIVING THE REVIVAL

AND RE-DISCOVERY OF OUR

EUROPEAN CULTURAL HERITAGE



The Polish National Audiovisual Institute's archives consist of more than 2,000 free audio and video files of important masterpieces from Polish culture¹⁰.

The Deutsche Digitale Bibliothek, which aims to offer everyone unrestricted access to Germany's cultural and scientific heritage, holds 6,126,439 digitised media items¹¹.

The French National Audiovisual Institute makes available one million hours of TV and radio programs and had 103 million views in 2014¹². Europeana digitally references over 48 million, artefacts, books, videos and sounds from across Europe.

Online driving growth in the creative sectors

From the printing press to the phonogram, radio, TV, recorded media, and online services, technology and culture have enjoyed a long history of collaboration and success. Going forward, it is vital for the continued growth of European creative industries that the role of digital innovation is embraced.

Creative production has long benefited from technological innovation and this has served Europe's creative industries well. From the phonogram giving birth to an entire industry (Europe's successful recorded music industry) to the growth in jobs, revenue and diversity that digital is driving today.



1. Driving jobs in the creative sectors

In recent years, technology and innovation have emerged as engines for growth in the cultural sector.

In Europe, both employment and revenues have risen in the creative industries since the digital revolution. Jobs in the European creative sector have continued to grow overall despite the economic crisis (2008-2012)¹³. The online environment is driving this growth.

94,000 jobs

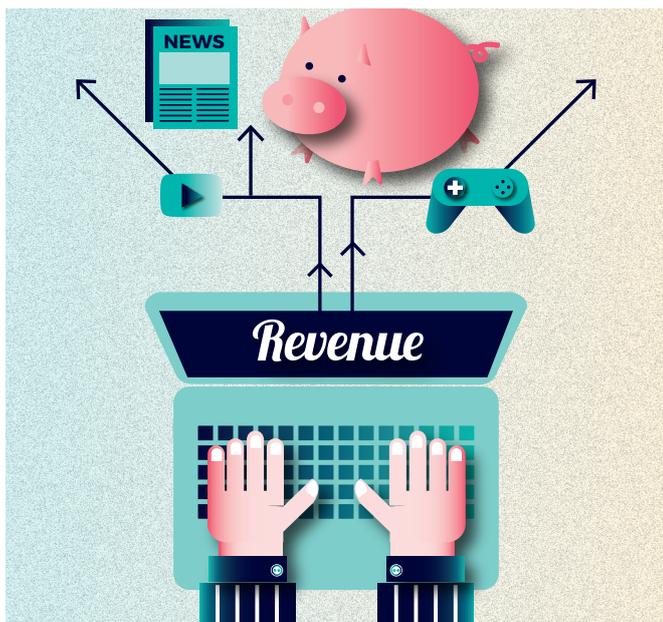
In the UK creative industries the IT sector (programming and publishing of software, gaming, etc.) was the highest net job creator, adding 94,000 jobs to the UK economy between 2011 and 2013, and the second highest growing source of employment, growing 19.4% over the same period¹⁴.

2000 jobs

In the UK alone, activity from YouTube partners supported between 1,000 and 2,000 jobs in 2014¹⁵.

+ 5 million

The EU App economy – which would not exist without mobile devices and operating systems – employed 1 million people in 2013 (creatives such as script writers and developers) and is projected to employ almost 5 million people by 2018. Online services continue to drive new areas of economic activity.



2.

Driving revenue growth for the EU creative sectors

In the past decade revenue growth in the EU creative sectors has been driven by digital media and online services. These services have allowed the content industry to reach global audiences and markets that were previously inaccessible through physical retailing, bringing licensed music services to over 200 countries¹⁶.

In less than 10 years, digital music downloads on iTunes went from zero to 35 billion songs sold¹⁷. Spotify has to-date paid over \$2 billion in royalties¹⁸ and YouTube has now paid over \$2 billion to the music industry alone. A subscriber to Spotify, Deezer or Apple Music generated 2.4 times more annual revenue (\$120 per year) for the industry than the average purchaser of physical or digital music (\$50)¹⁹.

Netflix is spending \$2 billion per year on content, with the vast majority of the money spent on licensing movies and prior-season TV shows²⁰.

€34 billion revenue increase

Between 2003 and 2013, digital accounted for a €34 billion revenue increase for the EU's creative sector, off-setting a €14 billion decrease in non-digital revenue over the same period²¹.

50% growth

In Spain, the digital content industry has grown by 50% between 2008 and 2013²².

Collecting societies continue to see overall growth and strong digital revenue growth; doubling globally between 1995 and 2010, with a further 20% growth in 2014²³.

€63 billion app revenue increase

Revenues in the European app sector make-up an estimated 35% of global app revenues²⁴ and is expected to reach revenues of €63 billion in 2018²⁵.

327% increase \$1.2 billion

For online video, total spending rose 97.1% from 2011 to 2012, and spending by European consumers on digital video subscriptions increased by 327% in 2012 alone²⁶.

In recorded music, Europe saw digital growth of 13.3%²⁷, as digital revenue in the three largest markets (UK, Germany and France) reached close to \$1.2 billion²⁸.

€10 billion video revenue

In video games, between 2005 and 2010, European spending increased from about €6.5 billion to over €10 billion between 2005 and 2010.

Axel Springer revenue increase to €1,705.8 million

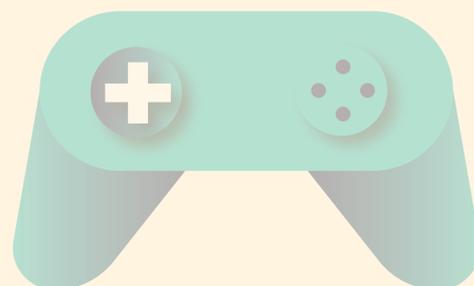
Axel Springer also saw the benefits of digitisation with pro-forma revenues from digital activities at Axel Springer rose from €1,568.6 million to €1,705.8 million²⁹.

ad revenue

In the print sector, news publishing are moving their strategy, from reaching increased audiences (Mail online and the Guardian were respectively the 1st and 2nd most viewed online newspaper in 2012 globally) to generating new revenue through advertising and payments.

ONLINE SUBSCRIPTIONS

In 2014, digital accounted for 70% of the Financial Times' total paying audience, as online subscriptions grew by 21%³⁰ and digital content revenues increased by double digits in the year to July 2015³¹.

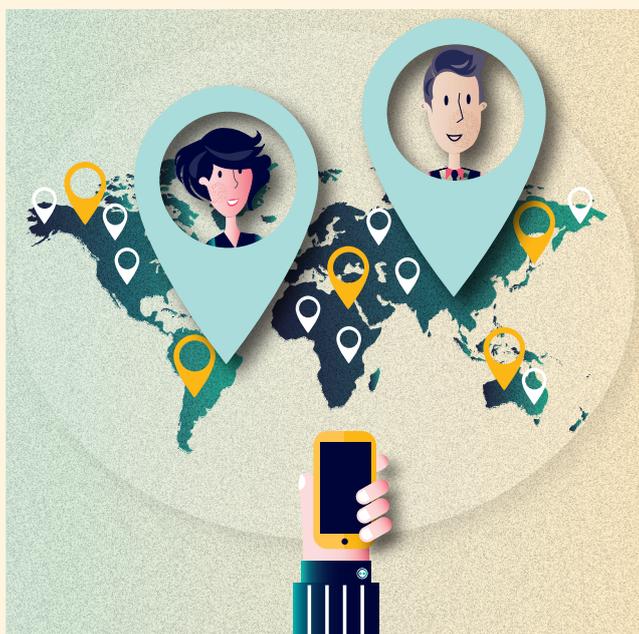


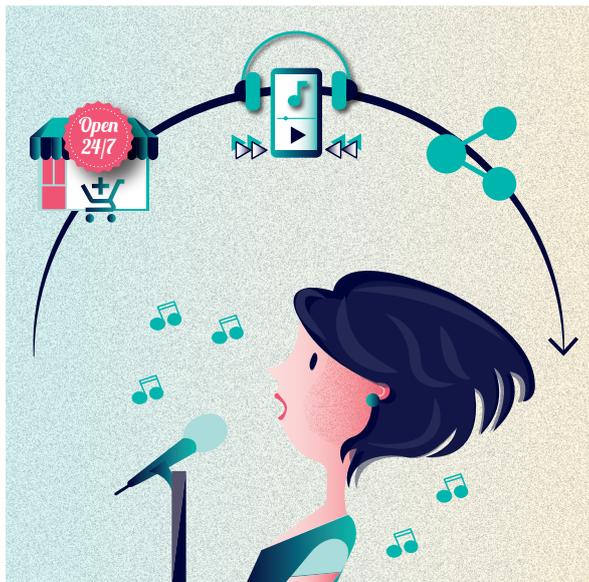
3. Lower barriers to entry

Practically anyone can use digital services to reach a global audience. Distributing content on iTunes, Play, Facebook, YouTube or on a mobile app store is incredibly easy and often involves little or no upfront cost. Many Europeans are enjoying this opportunity – e.g. there are 3 million European YouTube 'partners' using the video-sharing service to generate revenue online.

Some professional creators are also leaving established creative businesses to build an online business – without the legacy cost structure of the offline medium.

New European players are emerging in the news space, for example the French online investigation news site "Mediapart", founded by the former editor in chief of "Le Monde" Edwy Plenel, and which made its first profit in 2011; or for Spain's El Diario, an online news site published under Creative Commons licenses.





4. Lower distribution and production costs

Regarding music, digital technologies provide creators with greater opportunities to produce their content and reach their audience more effectively, efficiently and economically³².

In the press sector, the creation of content only accounts for 24% of the cost of a print newspaper in Germany, while 52% of costs go to productions, sales, distribution³³.

In the music sector, around 66% of revenues from a digital download now go to the artist and label, compared to around 32% for CD sales³⁴. In other words, digital technologies lower costs and allow more focus on remunerating creation.

5. Online discovery and promotion

Online services harbour new opportunities to engage with audiences anywhere, at any time. Consumers and fans looking for creative content can find and access this content, at the click of a button or touchscreen, at work, at home or during their commute, on a desktop or on a mobile device.

Furthermore, social media empowers creative industries to engage actively with their audience and fans; audiences, in turn, share and interact with the creative content, in turn generating additional attention and buzz. Creative industries are well attuned to this new form of engagement as they themselves publish news stories on Facebook or link to them on Twitter, upload music videos and trailers on DailyMotion or YouTube and chose to allow fans to remix or lip-dub their works on YouTube.



TF1 600% increase

The website of French TV channel TF1 saw a 600% increase in traffic since introducing social plugins.

Newspaper increased referrals by 680%

more from fan videos

The newspaper The Independent (UK) saw referrals from Facebook grow 680% during the course of 2010. The newspaper further announced that as of March 2016 it will only publish its online newspapers (The Independent and The Independent on Sunday).

On YouTube, the recording industry now earns more from fan videos on YouTube, such as mash-ups and parodies, than from official music videos according to Francis Keeling, Universal Music's Global Head of Digital Business³⁵.

6.

Online leading in the fight against piracy



New online services are supporting the fight against piracy. The rise in legal options to access creative content has led to a significant drop in piracy.

Innovative digital technologies are also empowering right owners to control their content online and generate new economic opportunities. YouTube's so-called "content-ID" allows right holders to control, for free and at the click of a button, whether users can share and remix their content on the video-sharing service. While right holders can choose to block the content shared by users, most prefer to leave it up, generating revenue in the process.

Users previously seen as pirates are now fans, generating attention and buzz for creators, as well as revenues – content-ID has generated €1 billion for right holders from re-mixes of content by fans.

Sweden: -25% The Netherlands: - 3.2 million IP addresses

In Sweden, the availability of legitimate and remunerated online distribution services led to a 25% decrease in music piracy between 2009 and 2011³⁶.

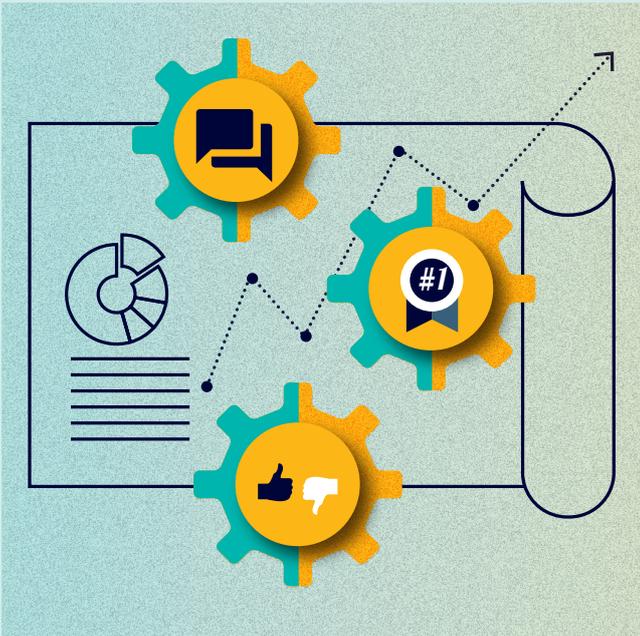
Piracy in the Netherlands has also significantly decreased, from 5.0 million IP addresses in 2008 to 1.8 in 2012.

Global decrease

Globally, 40% of those who stopped downloading music illegally in 2012 did so as a result of the presence of legal streaming services³⁷.

legal alternatives

Similarly, Netflix and other video streaming services help countering illegal film downloads by offering legal alternatives.



7.

Online data powering creativity

Data analytics are transforming the creative and distribution processes. Easy and free access to tools measuring fan engagement on Facebook, Twitter or YouTube, allows creators to understand and connect with their audiences.

This opens up important market opportunities, for example, from where and when to tour, where to conclude specific distribution deals and what interests the public most. Kevin Spacey’s hugely successful House of Cards launched because Netflix’s data analytics gave them confidence to back a project without a classic ‘pilot’ stage³⁸.

Artists and the touring industry organise concerts by seeking fan input (Demi Lovato and Shazam) and by allowing people to attend digitally (LiveNation). Data-driven journalism is boosting journalists’ ability to analyse and investigate, as illustrated by the Guardian³⁹ or BuzzFeed and the BBC in uncovering match fixing in tennis⁴⁰.



There is no doubt that technology is improving access to culture, connecting artists with amazing audiences. As someone who is passionate about ensuring access to culture, I welcome this digital revolution.



PLACIDO DOMINGO
TENOR, CONDUCTOR AND ADMINISTRATOR

Online driving innovation in the creative sectors

DRIVING A NEW WAVE OF CREATORS,

CULTURAL ENTREPRENEURS,

AND A REVIVAL OF OUR

CULTURAL HERITAGE

I think that this is an incredible fertile time for artists, there is no cap on creativity. The technological advances have given the artist an open door to creating as much as their capacity will allow.

BRENDA WALKER
MUSIC JOURNALIST, PressPausePlay

Ubiquitous connectivity and mobile devices are driving the production of creative content by users and consumers. The distinction between consumers and professional creators is one that is increasingly losing relevance. Motivations are hard to scrutinise; monetisation is not a defining criteria, as some professionals distribute content free or under creative commons licenses; and today's Internet user may be tomorrow's aspiring creator.

One simple fact remains critical; when consumers upload and share content online, they often use the same digital services that creative industries uses. Some of these uploads may attract copyright protection issues – or in some cases re-use someone else's work or infringe copyright.

This means that online copyright policy cannot afford to give focus mainly on creative industries. Policies need to work both for creative industries and for users who share their own creative content online.

This form of engagement and creativity is only starting to be recognised and is still largely uncaptured in measurements of creativity. WIPO now includes Wikipedia edits and YouTube uploads as measures of creativity in its global innovation index, and in the UK, the National Endowment for Science, Technology and the Arts (NESTA) is leading on 'dynamic mapping of the creative industries' including 'unorganised creators', but modelisation and data are still scarce.

This form of engagement also generates and supports economic value. Various methods to value Wikipedia estimate a valuation in the tens of billions of dollars, a one-time replacement cost of \$6.6 billion with an annual updating cost of \$630 million.



WordPress users produce about 36.3 million new posts and 63.1 million new comments each month.



Over 400 hours of video are uploaded to YouTube every minute and over 1.5 billion hours of video uploaded from France, Italy, Germany and Spain are watched by viewers in other EU countries.



There are more than 77,000 active contributors to Wikipedia working on more than 22,000,000 articles in over 280 languages.

Estimated benefit of Wikipedia for consumers goes in the hundreds of billions of dollars⁴¹, as it offers access to information in over 280 languages. User generated content creates huge benefits for European consumers as measured by consumer surplus, which amounts to an average €2,100 per connected consumer⁴².

New European businesses are emerging at the heart of the European creative sector. Talent discovery and promotion is moving online, offering new opportunities for entrepreneurs to support creators with their knowledge of digital services and their use of data.



There are 41,000 posts a second on Facebook, 5,700 Tweets a second on Twitter, and 758 million photos were uploaded and shared online each day in 2013⁴⁶.



Over 80 million new posts appear on Tumblr blogs every day. In the EU-28, according to Eurostat, close to 23 million Europeans engaged in creating a website or blog in 2012, including 14% of EU citizens aged between 16 and 24 years old, and over 83 million Europeans uploaded self-created content to a website, including 47% of 16 to 24 year olds.

For example, Jamal Edwards, one of Britain's most successful entrepreneurs, built "SBTV" into a major talent discovery and development platform, using online services such as YouTube to grow his business⁴³. Overall YouTube generates revenue directly for over 3 million European creators and entrepreneurs⁴⁴.

Multi-Channel networks are emerging as the new alternatives to traditional talent discovery structures such as labels. They combine the use of online platforms and services to support creators on funding, monetisation and audience development for creators. Believe Digital, established in Paris, has quickly risen to the status of one of the world's leading service provider for artists and labels, representing over 8 million tracks and employing a workforce of over 250.

Thanks to technological innovation, the app economy, which did not exist a decade ago, is now a booming outlet for creative and entrepreneurial talent, fuelling growth and jobs in the EU. Europe's app sector has been growing significantly with 1.8 million people employed in the industry by 2014⁴⁵.



Flickr has more than 92 million unique global users and houses more than 106 billion photos.

533,000 subscribers

Dutch online newspaper service Blendle allows users to access newspaper and magazine articles on a pay-per-read basis, remunerating publishers for every article read. Two years after its creation, it has 533,000 subscribers, 2/3 of which are younger than 35⁴⁹, and has recently launched in Germany with over a hundred outlets⁵⁰.

New talent is discovered online

Jack & Jack, American pop-rap duo, rose to fame and became professional musicians by promoting their self-produced work via social media (Vine, Twitter).

Their single “Calibraska” became number 1 on the iTunes charts and they have now sold over a million songs from their 11 previous releases, receiving 100% of their iTunes royalties⁴⁷.

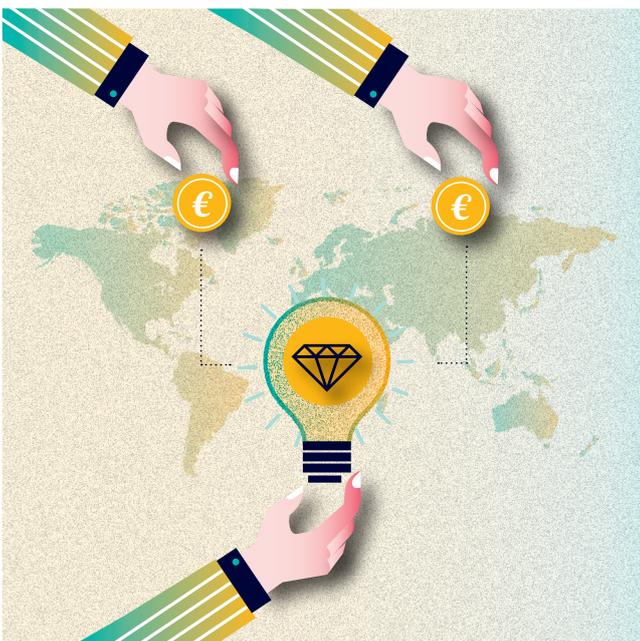
Canadian pop star Justin Bieber built up a large dedicated fan base on YouTube by uploading self-recorded videos for a number of years, which helped him land a record deal. He was the first minor to have made a breakthrough in music in the US solely because of his online videos⁴⁸.

40 million

Over 70 publications have signed up to Apple’s news publishing service, which soon after its introduction in 2015 had over 40 million users.

DRIVING NEW SOURCES

OF FUNDING



Online services directly provide revenue through a combination of ad-funded and paid content models. These fit into a much broader range of funding opportunities.

Based on the wide-variety of media and content, no creator today finds themselves solely reliant on one medium or service provider for compensation, rather creators continue to engage with a number of services and approaches both online and offline. These include revenue streams for online “distribution” service or platforms, directing consumers to their paid content, merchandising, live performances or appearances, book publishing deals, VIP events, etc. PWC for instance reports that live music revenues in the UK quadrupled from €600 million in 2000 to over €2.4 billion in both 2010 and 2011.

Fan funding is also emerging as a new source of revenue. Swedish filmmaker David Sandberg’s “Kung Fury” was crowd-funded, raising €200,000 in 24 hours and €630,000 in total. Premiered at the Cannes Film Festival before reaching over 25 million views on YouTube. On KissBankBank, Europe’s leading crowdfunding website focused on creativity, over €44 million were collected for over 18,000 creative projects since its foundation in March 2010⁵¹.

Online driving more consumption of European cultural content

ONLINE DATA

POWERING CREATIVITY

European consumers are spending more than ever before on creative content. Consumer spending in the creative sector was up 25% in 2011 from 2001, and revenue per usage hour in the EU-27 countries have increased by more than 130% for Internet related products and services over the same time period⁵². Online revenues for creative sectors more than doubled between 2003 and 2013⁵³.

In the music sector, annual individual music purchases have increased since 2006⁵⁴, with another record mark of 1.65 billion music purchases in 2012, up 3.1% compared to 2011⁵⁵. There are now an estimated 41 million paid music subscribers globally, up from 28 million in 2013. In Sweden, 50% of Internet users have a paid subscription service.

In the video sector, European consumer spending through digital platforms and services also rose by 42.8% in 2013, to a total of €1.97 billion⁵⁶. Over the course of last year alone (2014-2015), the share of Europeans who paid for streamed TV and film content online increased by 400%⁵⁷.

Online consumers have a broader choice than ever before. There are now an unprecedented 37 million songs available on leading digital music services and 400 hours of video uploaded every minute on YouTube, further driving the increase in the diversity of creative content accessed⁵⁸.

Online is a driving force for more pluralism, with European online news users accessing significantly more news brands than offline users. Europeans are using a healthily mix of online services to reach news content, including Facebook, YouTube, Twitter, WhatsApp, etc⁵⁹.

Users of social media, mobile apps aggregating news and search tools read more diverse news sources - roughly three-quarters of these users also access news sources they do not normally access⁶⁰.

Conclusion: Need to recognise a dynamic, evolving creative landscape

At a time when the sector is so dynamic, evolving, and continuously growing, getting the facts right is a challenge for evidence-based policy-making.

The key to future-proof policy making lies in understanding of the relationship between technology and cultural industries: how digital is providing new opportunities, and how creative industries are already capitalising on these opportunities. To understand the opportunity at work is to understand that creative industries and technological innovation go hand in hand. Policies that seek to privilege one over the other will harm both, and jeopardise the future of Europe's creative economy.

Without a proper understanding of the changing landscape, the risk of policies negatively impacting the development of the cultural sector during this phase of change and adaptation to the digital environment is real.

Give people what they want, when they want it, in the form they want it in, at a reasonable price, and they'll more likely pay for it rather than steal it. [...]

And the audience has spoken. They want stories. They're dying for them. They're rooting for us to give the right thing. And they will talk about it, binge on it, carry it with them on the bus and to the hairdresser, force it on their friends, tweet, blog, Facebook, make fan pages, silly GIFs, and god knows what else about it.

Engage with it with a passion and an intimacy that a blockbuster movie could only dream of. And all we have to do is give it to them⁶¹.

KEVIN SPACEY
ACTOR, FILM DIRECTOR, PRODUCER,
SINGER AND COMEDIAN

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