

PERCEPTIONS ON THE SIGNIFICANCE OF INTERNATIONAL MUSIC SYNCHRONIZATION FOR FINNISH MUSIC COMPANIES

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<p>Abstract</p> <p>Music synchronization has been recognized as an important field in the music business after the music industry's digital revolution. The aim of this study was to elaborate the importance of music synchronization for Finnish music companies. This bachelor's thesis attempted to determine the outlook of Finnish music companies towards the possibilities of music synchronization in music export as well as the significance of music synchronization as a whole, at present and in the future. The business of music synchronization has not been researched before in Finland.</p> <p>The thesis' theoretical framework consisted of the workings of music industry, the state of the Finnish music industry and international music business as well as the benefits of music synchronization and the different medias for it. The research data consisted of interviews of eight music industry professionals representing eight different Finnish music companies. The interviewed professionals were customers of Music Finland that had expressed interest in international music synchronization. Semi-structured theme interview model was used for the study and data was analyzed through themes as well.</p> <p>The research confirmed that music synchronization offers earning potential and various promotional benefits for artists. For songwriters and publishers, music synchronization is substantial earning potential and record companies see it as a marketing and promotional tool for entering foreign markets. Finnish music export companies recognize the potential of synchronization but it remains largely unexploited. The structure of the Finnish music industry does not provide the best grounds for success in international music synchronization. However, Finnish music companies do have hope and they believe in the potential of music synchronization whereupon they continue to invest in it. The professionals in the research sample believe that synchronization will become more important in the near future as the music industry continues reshaping.</p>		
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<p>Tiivistelmä</p> <p>Musiikkiteollisuuden digitaalisen vallankumouksen myötä musiikin synkronisoinnin tärkeys on tunnustettu alan sisällä. Tässä opinnäytetyössä tutkittiin kansainvälisen musiikin synkronisoinnin merkitystä suomalaisten musiikkiyritysten näkökulmasta. Tutkimuksen tavoitteena oli selvittää, mitä mieltä suomalainen musiikkiala on musiikin synkronisoinnin mahdollisuuksista musiikkiviennissä ja sen merkityksestä koko musiikkiteollisuuden kokonaisuudessa nykypäivänä ja tulevaisuudessa. Musiikin synkronisointia ei ole aiemmin tutkittu Suomessa.</p> <p>Teoriaviitekehys muodostui musiikkiteollisuuden ansaintalogiikasta, suomalaisen musiikkiteollisuuden erityispiirteistä, kansainvälisen musiikkiteollisuuden tilasta sekä musiikin synkronisoinnin hyödyistä ja muodoista. Tutkimusaineistoksi haastateltiin kahdeksaa suomalaista musiikkialan toimijaa, jotka kaikki edustavat eri yrityksiä ja olivat Music Finlandin asiakkaina ilmaisseet kiinnostustaan kansainvälistä musiikin synkronisointia kohtaan. Haastattelumallina oli puolistrukturoitu teemahaastattelu ja niin ikään tutkimusaineisto analysoitiin teemojen kautta.</p> <p>Tutkimus vahvisti, että synkronisointi tarjoaa uutta ansaintapotentiaalia alalle ja monipuolista promootio- ja markkinointihyötyä artisteille osana musiikkiteollisuuden kokonaisuutta. Kirjoittajille ja kustantajille synkronisointi tarjoaa merkittävää ansaintapotentiaalia ja levy-yhtiöt lisäksi näkevät synkronisoinnin promootiovälineenä uusia markkina-alueita valloitettaessa. Suomalaiset musiikkivientiyritykset tunnistavat synkronisoinnin potentiaalini, mutta se jää suurelta osin hyödyntämättä. Suomalaisen musiikkiteollisuuden ominaispiirteet ja rakenne eivät luo parhaita mahdollisuuksia kansainvälisille onnistumisille synkronisoinnin saralla. Suomalaisella musiikkialalla on kuitenkin uskoa ja toivoa kansainvälisen synkronisoinnin mahdollisuuksiin, jonka myötä siihen panostetaan ja investoidaan. Musiikkivientiyritykset uskovat synkronisoinnin merkityksen kasvavan lähitulevaisuudessa, musiikkialan edelleen muotoutuessa.</p>		
Avainsanat (asiasanat) musiikin synkronisointi, synkronointi, synkka, musiikin lisensointi, musiikkivienti, Suomen musiikkiteollisuus, musiikkibisnes, kansainvälinen musiikin synkronisointi		
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KEY CONCEPTS AND TERMINOLOGY

Music synchronization	combining copyright music with pictures in an audio-visual production and the business of it abbreviation: synchronization, synch, sync
Music/synch licensing	right holders giving permission to use an existing song and recording in an audio-visual production
Copyright	rights of the author of a song
Related rights	rights in a sound recording
Placement	in the context of music synchronization, successfully coordinate/sell one's music to an audio-visual production
Clearing rights	the act of getting the permission of right holders for the use of music
Music Finland	organization dedicated to promoting Finnish music and music industry in Finland and abroad
Independent music	music owned by a music company independent from the three majors (Universal Music, Sony Music Entertainment, Warner Music Group) or an individual party abbreviation: indie music

1 INTRODUCTION

After the technological revolution in the music business and the recording industry dive in the early 2000s, new revenue sources were sought within the music industry. Music synchronization arose as one of the new income sources as new media continued to be a driving force for the society (Gammons, 2011, pp. 66-67). Todd and Jeff Brabec (2006) are convinced that success in the music business is achieved by exploiting the link of music to all the entertainment industry by utilizing music synchronization among other industry links. Globalization has made business as international as ever, and for a small music industry such as that in Finland, international markets are the direction to which music companies must expand to in order to survive, grow and fully exploit their potential. Finland has not been as quick in utilizing the financial possibilities of synchronization as other countries may have been. Finland has been more progressive in performance royalties and the sales of digital recordings than in synchronization according to the IFPI reports (Recording Industry in Numbers 2012, 2013).

Music Finland, an organization which promotes the exports and awareness of Finnish music, started working towards international music synchronization in 2011, and by now has organized an event called Sync Summit three times. Sync Summit is a music synchronization seminar held together with the A&R Worldwide and organized in affiliation with the yearly Music & Media Conference in Tampere. The event's purpose is to enhance the international synchronization possibilities of Finnish music by bringing international music synchronization experts to Finland to educate and network with the Finnish music industry. However, it seems that international synchronization in Finland is still at a primeval stage. Music Finland's Sync Summits have yet to bring significant success to Finnish music. Some isolated achievements for the benefit of Finnish music have been made but international synchronization has not yet brought any significant prosperity to the Finnish music industry. With the continuing change and reinvention of business models in the music industry, it is fair to ask how important international music synchronization is for the Finnish music industry today and in the future and if the companies will invest in it.

This thesis attempted to examine the significance of music synchronization in the export operations of Finnish music companies by considering the current rank and

potential of music synchronization and its impact on the entity of music business. According to Passman (2012, p. 453), in order to understand music in films, TV, and advertising, one needs to have a complete knowledge of the music business, as well as knowledge of the business in question, for example the film industry. Therefore, in this thesis, the role of music synchronization in the music business is first presented by explaining the music business revenue logic and the change in business models, as well as by making a deeper look into what music synchronization is. This qualitative study concentrated on Finnish music industry professional's views on international music synchronization and its future. The research data was collected by using semi-structured theme interviews. A theme-focused content analysis was used to analyze the research data.

Music synchronization has not been studied before within the Finnish music industry. The assigning party, Music Finland, needed to determine whether their efforts made and resources used for the promotion of the export of Finnish music through music synchronization were sufficient in respect to the potential and whether more or less measures should be taken towards international music synchronization.

2 THEORETICAL FRAMEWORK

2.1 Music Industry Revenue Logic

"The entire music business starts with a musical composition or song." (Winogradsky, 2013, p. 1) The song allows the existence of songwriters, composers, recording artists, publishers and record companies as well as promotion and retail companies who enable the use of music in media outlets such as television, radio and movies in addition to the use of corporate and private music users and consumers (Winogradsky, 2013, p. 1). In other words, the music business is comprised of enterprises and people between the song and its outlet: songwriters, lyricists, artists, management, publishing, record company, public relations, retail and distribution. The music industry has traditionally relied heavily on record companies and revenue from recordings (Krasilovsky, Shemel, Gross, & Feinstein, 2007, pp. 4-7).

Publishing is one of the first commercializing factors of music. While publishers simply provide songwriters the possibility of a profession as a songwriter, they deal with the fundamentals of music industry: the copyright (Winogradsky, 2013). Gammons (2011, p. 63) explains that publishers' income is received from their share of the copyright derived income of songwriters: performing rights, mechanical rights, synchronization and print rights. Performing rights income is generated when a song is played in public (e.g. radio, television or a club). Mechanical rights income is derived from the sales of records. New services, such as Spotify, only pay one streaming royalty to the publishers, which can be related to the traditional mechanical license fees and public performance royalties (Spotify, 2013). Synchronization income comes from licensing music for TV, film, commercials and so on. Print rights create income when song lyrics are printed, for example, on a magazine, or when sheet music is sold (Gammons, 2011, p. 9). Passman (2012, p. 244), however, labels synchronization and print rights as secondary sources of income for a publisher.

Brabec and Brabec (2006, pp. 1-2) describe music publishing as the darling of the investment community and the new gold rush of the century. Creation and ownership of songs is valuable in the entertainment industry since music is one of

the principal elements that keep entertainment programming exciting and interesting (Op. cit.)

"Copyright literally means 'the right to copy'." (Krasilovsky, Shemel, Gross, & Feinstein, 2007, p. 90) **Copyright** is the author's exclusive right to reproduce, publish, sell copies of, make other versions of, and with certain limitations, make recordings and perform the work in public (op. cit.). Tekijänoikeus.fi (2013) states that a copyright protects creative works and their creators. Copyright ascertains that creative processes can go on and that creative workers can make a living. Copyright exists at the point of creation, arising automatically. The work needs to be an independent original work. Gammons (2011, p. 13) explains that copyright exists for the following works: original music, artistic, literary and dramatic works as well as films, sound recordings, broadcasts, cable programs and typographical arrangements of published editions. These are all called intellectual property.

While the writer and publisher own the administrative rights to copyright in a song, the record company or artist owns the copyright in a sound recording (Gammons, 2011, p. 13). The rights to a recording are also called neighboring or related rights. Both copyright and related rights are in use in music synchronization.

The recording industry comprehends the artist and releasing of music. Simply put, a record company is involved in all the processes necessary for artists to bring their music to the distributors of digital and physical recordings. In addition, the record company takes care of the artist's marketing, advertising and promotion (Passman, 2012, pp. 63-66).

Record companies have nowadays secured their survival by establishing or acquiring publishing and management companies, booking agencies and other firms in order to collect money from artists' sources of income that are not limited to recordings. Today, record companies prefer to sign in their artist with so called 360 degree deals, in which the record company royalty share comes in from all sources including touring, songwriting, merchandising, sponsorship and motion picture acting. Record companies have evolved from record companies to brand-building companies. As Passman puts it: "It's true that record companies are the only ones spending substantial money to break an artist's career -" (2012, p. 97).

Passman (2012, pp. 1-60) emphasizes that picking the right people for representation is crucial for artists or songwriters who want to succeed and maximize their potential. The main players are personal managers, attorneys, business managers and agencies. For artists, personal managers are the most important group of these five. Managers help them with business decisions such as record deals, the creative process, career promotion, coordinating concerts and tours with agencies, in other words, they represent the artist overall. Agencies are responsible for booking live personal appearances. Managers and agents usually earn a percentage out of their client's income (Op. cit.).

The live music industry makes 71% of the whole value of the Finnish music economy (Tolppanen, 2013), and it is thus a significant part of the music business. It can be said that artists generally make their living out of the income from live appearances. However, touring can inflict more expenses than earnings (Wilsey & Schwartz, 2010). Merchandising is a substantial part of artist income, as well. According to Passman (2012 p. 389) there are two types of merchandising: tour and retail merchandising. Tour merchandising is the more significant moneymaker and it might often be the key to generating profit from tours.

Music has a strong presence in today's media. One of the new outlets that the technological change has brought for music is social media, which allows artists a closer contact to their audience than ever before. The 2013 IFPI Digital Music Report remarks, "9 in 10 most liked people in Facebook are artists, --, 7 in 10 most followed Twitter users are artists, --, 9 in 10 most watched videos on Youtube are music." Tolppanen (2013) determines in his research of the Finnish music industry market value that the future expectations for the growth of the music industry lie on the evolvement of subscription services and better exploitation of artists and repertoire in business co-operations.

2.2 Music Industry Change

The music industry has been in a state of transition since the latest technological discovery in music, the mp3, which drove the sales of records down. The new technology has always had a great impact on the music business. This started with

the introduction of Edison's cylinder and later continued, for example with the shellac 78rpms, CDs and digital music (Krasilovsky, Shemel, Gross, & Feinstein, 2007, p. 1). The change has forced the music industry to reinvent their business models and find revenue from other sources. Sweden is the only major market that has been able to keep the overall music revenue on a stable level since 2006 due to reinventing their business model for the music industry with music subscription services, such as Spotify as the leader (Ahrens & Kreidenweiss, 2012). Although the initial reaction by the music industry was to battle against piracy, which caused the industry's slow reaction to the change (Rogers, 2013, pp. 72-82), Searle's study (2011) indicates that enforcing intellectual property is not the driving force behind the reinvention of companies and business models. Instead, the focus is on creating engaging content. In the Nordic countries and South Korea subscription services exceed digital downloads whereas in the traditional and large music markets such as the USA, Germany and the UK, digital downloads are still the number one format for digital music. Interestingly, vinyl sales grew globally by 52% in 2012 (Recording Industry in Numbers 2012, 2013).

Helen Gammons (2011) emphasizes that change brings opportunity, and that music industry professionals and newcomers should not be concerned if there is room for them in the industry. Instead, they should think of ways to pursue the emerging income streams. According to Gammons, the publishing industry entails many of those potential revenue streams.

Licensing income has not been greatly affected by the recent industry change. On the contrary, the industry has shifted its eye towards the intellectual property as an increasing source of income. According to the IFPI report (Recording Industry in Numbers 2012, 2013) the global recording industry revenues climbed in 2012 for the first time since the 1999, because of the increase in digital sales, performance rights and sync revenues, combined with the rise of the rapidly growing emerging markets. The record companies reported growth in the music synchronization licensing revenue in addition to performance rights, video, downloads and subscription income globally during 2013 (IFPI Digital Music Report 2013: Engine of a Digital World, 2013). According to Peter M. Thall (2002, p. IX), statistics show that in the beginning of the 21st century the intellectual property enterprises (such as music,

theater, film and television companies) contributed more to the United States gross national product than the automobile or the agricultural industry.

2.3 Current State of the Finnish Music Industry

According to the IFPI report (Recording Industry in Numbers 2012, 2013), the global recorded music trade revenues, including sales of physical and digital recordings, performance rights, and synchronization was 16 418 million USD (about 12 000 million euro) and in Finland 53.2 million USD (circa 38.5 million euro). Finland is a special music market. The report shows that 90% of the national top 10 albums of 2012 were local acts, which is the highest number in the whole world. Sweden, Italy and Croatia reached almost as high with 80%.

Similarly to the United Kingdom and Sweden, research was conducted in Finland for the first time in 2012 on the overall music industry economy including live music, sales of recordings, intellectual property royalties, education and grants (Tolppanen & Tuomainen, 2012). According to the research, the overall value of Finnish music industry in 2011 was assessed to be 817.7 million euro and in 2012 837.2 million euro with a growth of 1.6%. In the United Kingdom the industry value was 4.5 billion, which is eight times the size of the comparable Finnish number from 2011. The Swedish industry was valued 738 million, which is one third bigger than the Finnish (Tolppanen, 2013). Finland was the 25th biggest music market in the world ranking for total music market value in 2012 (Recording Industry in Numbers 2012, 2013). Finland excelled in performance rights revenue, in which it was ranked number 18 but fell behind on synchronization, being ranked the 32nd. In comparison Sweden's world ranking in the total market was the 12th, performance rights 13th and synchronization 11th. UK was the 3rd biggest in the total market value, 2nd in performance rights and 3rd in synchronization. A new trend can be seen in Asia and Latin America with their ranking in synchronization being higher than the total market ranking (IFPI, 2013).

The Finnish music industry value has been reported to have had steady growth for the past few years which indicates healing from the loss of the recording industry revenue. The growth from 2011 is 1.6%. The live music sector exceeded others with

the share of 413.8 million, which comprises a very significant part of the whole value. The sector of intellectual property royalties was worth 79.6 million (Tolppanen, 2013). The overall value of businesses based on intellectual property including other arts and gaming industry was 21.7 billion euro in 2005 in Finland according to Ministry of Employment and the Economy. In 2010 there were almost 20 000 culture enterprises in Finland (Ministry of Employment and the Economy, 2012). The Finnish music industry employed 30 000 people including part-time musicians and volunteers (Tolppanen & Tuomainen, 2012).

According to Janne Silvonen (2013) the value of the Finnish music export in 2012 was 35.8 million with the sale of goods being the biggest revenue source. The sales of services reported growth of 34% from 2011. Silvonen imparts that as the Finnish music export has previously relied on a few big names, there are now many new smaller bands from several genres building their fan base internationally, which indicates better chances for breakthroughs and, thus, bigger future export revenues.

2.4 International Music Business

The Finnish Ministry of Education and Culture states in its final report on the culture export program, that several dozens of culture entrepreneurs and operators have emphasized that even though the domestic market is well operable, it does not enable commercially profitable production. Therefore growth is to be sought from export (Ministry of Education and Culture, 2011).

Foreign earnings have become a major factor in the profit-and-loss figures of the publishers in the United States. International aspects of the music business have been firmly established (Krasilovsky, Shemel, Gross, & Feinstein, 2007, p. 217).

Brabec and Brabec (2006, p. 387) explained that knowing the local markets becomes very important. This is done by the help of local personnel.

"- - each foreign country has its own rules and its own distinct way of licensing music, collecting royalties, and protecting copyrights." (Brabec & Brabec, 2006, p. 387) For example in Finland the collecting society for copyright is Teosto. Gramex collects money from the related rights. In Germany the equivalent to Teosto is GEMA (Gesellschaft für musikalische Aufführungs- und mechanische

Vervielfältigungsrechte). In the United States there are three performance rights organizations: ASCAP (The American Society of Composers, Authors and Publishers), BMI (Broadcast Music, Inc.) and SESAC (Society of European Stage Authors and Composers). The American counterpart to Gramex is SoundExchange, which however, only collects digital performance royalties. Very often they are not the equivalent organizations that take care of the same matters. Hence, in international business, the money passes through many organizations before it reaches its destination. (Winogradsky, 2013, pp. 16-17, 25, 218). In Finland Teosto administers both synchronization licenses and mechanical licenses through NCB (NCB Nordisk Copyright Bureau, 2013). On the contrary, in the United States mechanical rights are mostly administrated by the Harry Fox Agency and synchronization rights are to be acquired from the right holders themselves (Pitt, 2010, p. 22). Due to all these different organizations, international transmittal of royalties is slow, especially concerning intellectual property income (Brabec & Brabec, 2006, pp. 16, 428).

However, the European author societies have been working together to harmonize the collection of royalties through GESAC - the European Grouping of Societies of Authors and Creators, which represents the 33 main collecting societies of Europe. In February 2014 the Directive on Collective Management of Copyright and Related Rights was set by the European Parliament. It encourages copyright collecting societies to work together on a European level in negotiating deals with licensees and securing fair remuneration to creators (Authorsocieties.eu, 2014). Again, the global harmonization of copyright laws has been pursued through international treaties such as the Berne Convention, that was first accepted in Berne, Switzerland, in 1886 and that is administered by the World Intellectual Property Organization (WIPO, 2014).

2.5 Synchronization in the Music Business

"Licensing music is the future of the music business and the future is now!" (Wilsey & Schwartz, 2010, p. 1) Wilsey and Schwartz think that licensing music can often create better revenue streams than touring or record deals. The financial gain of licensing comes from more than the licensing fee. In addition, there are broadcast royalties, soundtrack album royalties, merchandise, sheet music and performance revenues.

As mentioned in "2.1.2 Copyright", synchronization licensing includes both rights to the song/composition and license to the recording. In licensing these are called master license for recording and a synchronization license for the song (Wilsey & Schwartz, 2010, p. 38). Consequently, licensing music involves and benefits both the publishing and recording businesses.

In Finland the national performance rights organization Teosto grants licenses for audio-visual productions concerning Finnish music through the NCB. They grant all the licenses needed, synchronization licenses, master right licenses and a license to copy. A person making an audio-visual production can contact the NCB that will in most cases grant fixed price synchronization licenses for TV productions, documentaries, feature films and short films in Finland and the Nordic territories. For music use in commercials and movies and any audio-visual production where the song that is used will have a very substantial role, the NCB will always have to contact the right holders for negotiating the licenses (NCB Nordisk Copyright Bureau, 2013).

For music publishing, synchronization offers obvious financial benefits. According to Gammons (2011) "Music publishers have seen a steady increase in synchronization income with the explosion of new media and how this is used and delivered to consumers." Gammons states that synchronization is one of the primary income streams for publishers in today's media-driven society. Also Bessman (2007) recognizes synchronization royalties as an essential source of music publishing income and told that the Universal Music Publishing Group has an aim to acquire a significant catalog not just for performance income but synchronization as well. For example, the UMPG celebrated an administration deal with Paul Simon as a "tremendous success on the synch side" (Bessman, 2007). According to Gammons (2011), synchronization income should rank high on the priority list of a developing publishing company because of its ability to create immediate cash flow.

On the artist and recording business side, Michael Paoletta (2007) provides an example of the Teddybears, a Swedish pop-rock trio whose album sales were insufficient to recoup the expenses. However, the band gained additional marketing dollars out of synchronization income, and the record company was able to cover its

investments. From the first few synch licenses others quickly followed, and with each new synch the band gained more popularity and built its fan base.

According to Wilsey and Schwartz (2010, p. 4), exposure is a major benefit, that can be gained out of music licensing. Meaningful national exposure can be even more important than the upfront payment because of the different income streams and career opportunities for the artist. Many unknown artists have had their career launched when music lovers have heard their song in a film, commercial, TV show or a game. The television show *Grey's Anatomy* is said to have almost single-handedly raised the band Snow Patrol to international success after featuring their song "Chasing Cars" in the emotional season 2 finale in 2006.

In addition, synchronization licensing has publicity value. Wilsey and Schwartz (2010, p. 4) say that "Bringing rights can be beneficial for marketing and getting press attention." Especially for an unknown artist synchronization adds authority to an otherwise generic press kit.

Synchronization is an especially prominent field for indie music. With the industry undergoing dramatic changes, a record deal offers musicians less potential than ever to earn a living. New media makes it easier for bands and musicians to work on their own or with the help of a small record company (Wilsey & Schwartz, 2010, p. 11). Independent/indie artists either handle their business self-reliantly or are signed to a record label that is independent from the three major record labels: Universal Music Group, Warner Music Group, Sony Music Entertainment.

Gammons (2011, p. 62-74) assesses the figures of the publishing division of the Warner Music Group and interprets that as television commissioning has gone down as a result of more replays, television companies wish to pay less for music. In addition, the film industry is willing to pay less for synchronization because of piracy and recession affecting their industry. Moreover, major film and television broadcasters are more willing to work with independents as they generally accept lower fees.

According to Passman, the recent trend in television is that music supervisors look for unknown artists with trendy material from indie labels, music blogs, Youtube and

similar sites. Indie artists often endorse these offers since it can mean immense exposure for their material even though the fees are very small and the consequent income is mostly performance fees for songwriters when the show airs (Passman, 2012, p. 455).

There is a business advantage for an independent artists compared to artists on big publishers and record labels. If artists own both their master rights of their recordings and the publishing rights for songs, they are the sole party to own the rights for the songs, which makes indie artists an appealing partner from a licensors perspective (Wilsey & Schwartz, 2010, pp. 10-12). Licensing agreements are usually nonexclusive, which means that the same song can be licensed for many different users and uses. Therefore one good song can generate many lucrative licensing deals (Wilsey & Schwartz, 2010, p. 2).

Music supervisors are important players in the business of music synchronization. Passman (2012, pp. 453-455) explains that they coordinate music for movies and television, and that they are the ones to make contracts with right holders on using their music. Music supervisors usually have a very short time to acquire all the music for films or TV due to the production schedules. Usually most of the music cannot be finalized until the cut is complete. Each piece of music may represent eight or more contracts. All the rights are to be cleared so as to ascertain that all the right holders have been consulted and the answer to the offer is positive (Op. cit).

As for any business, networking also plays an important role in music synchronization. For music professionals seeking international synchronization for their music, there are many international networking events, such as the Sync Summit, within other events like Midem and Musexpo or independently, where music owners and agents go to meet music supervisors who seek music for their projects. According to Wilsey and Schwartz (2010, p. 18), people who need music prefer to acquire it from reputable people. With an established relationship it is easier to offer music and have it screened. Music supervisors gladly turn to people with whom they have already had successful business contacts and who offer music that is pre-cleared, which means that the party offering the music has already negotiated with the right holders.

Wilsey and Schwartz (2010, pp. 98-101) instruct people who want to license their music to have an understanding of the emotion and tone of music and of the job of a music supervisor. The simplified process of how music is chosen starts from the music supervisor seeking certain kind of music and ends at someone providing exactly that (op. cit. 105-117).

2.6 Types of Synchronization

Music licensing is not to be confused with a score. While music licensing benefits the artist, record company, songwriter and publisher, a score means that a songwriter composes a piece to be synchronized with a specific visual content and that the beneficiaries are only the songwriter, publisher and a possible agent. However, both are considered music synchronization. "A score is most commonly a collection of instrumental compositions used in film and television." (Wilsey & Schwartz, 2010, pp. 4-5)

Sometimes in large budget productions especially in the United States a score is written as work-for-hire in which the author submits all the publishing rights to the hiring company and receives no royalties but a hefty commission. However, usually the writers can keep their copyright. Furthermore, songs could be written by commission for synchronization purposes (op. cit. 4-8).

Music is very important to the film industry, and the film and music industries thrive from each other (Krasilovsky, Shemel, Gross, & Feinstein, 2007, p. 236). Music serves many roles in a film: there is underscore and/or songs as background music, songs to accentuate pivotal scenes and opening and closing credits. The music that features the film may in the long run become what defines the film or era, for example, in cases such as the *Bodyguard* and *Saturday Night Fever*. Music and media industries may work together with marketing strategies so that soundtrack single releases are timed with the movie release (Wilsey & Schwartz, 2010, pp. 170-173).

Motion pictures are also a prime source of music evergreens. Hits such as *Moon River* and *White Christmas* have both been movie tunes and have since had over 50 charted covers. Movies can generate much income in the long run. Movies may become a very lucrative source of income providing higher fees than television plus

tremendous exposure and publicity advantages. Additionally, income might be generated in mechanical royalties when the song is featured on a movie soundtrack album (Krasilovsky, Shemel, Gross, & Feinstein, 2007, pp. 236-240).

Compared to film, TV synchronization opportunities are much more frequent but offer smaller license fees. However, the royalties are often long-term as reruns accumulate performance income. Television is especially indie artist friendly and can assist in artist breakthroughs (Wilsey & Schwartz, 2010, p. 10).

"Whether it is a brand new network, cable or local television series, a series that has been running for years, or a series that was a hit years ago and runs forever in U.S. and foreign syndication, a single TV series can provide composers and songwriters with royalties that provide a substantial, life-long annuity." (Brabec & Brabec, 2006, p. 171)

The history of licensing music for television is not long. Not so long ago television music was mostly limited to theme songs and underscores. A theme song is very valuable and as long as the series is aired, it continues to generate performance royalties. Theme songs are usually commissioned works for hire, but, for example, the theme song of Friends has also crossed over to the charts (Wilsey & Schwartz, 2010, pp. 155-166).

The largest synchronization fees are generated from advertising. According to Brabec and Brabec (2006, p. 36), a successful commercial can pay up to a million dollars per year in the United States. The fees depend on many factors such as if the campaign is on the radio, on TV, online and for how long it is supposed to run. Regarding the aforementioned big cases, some major advertisers may request exclusivity from a publisher. This would usually mean that a certain song cannot be used in another commercial for competing or similar products but could still be used in some other synchronization (op. cit.).

Jingles were used for many years to reinforce a memorable expression or a slogan linked to a product. This was a lucrative income source for songwriters and still is for some. However, the use of jingles has prominently diminished, and they have been

replaced by licensing existing songs: old hit songs, new songs by new artists or covers of old hit songs by new artists (Wilsey & Schwartz, 2010, p. 184).

Film, TV and advertisement industries are the traditional channels of music synchronization, but as stated about the change in the music industry business models, the change from analog technology to the digital one is going on in all domains of the entertainment industry. Wilsey and Schwartz (2010, p. 213) instruct to keep eyes open for licensing opportunities in the wide range of digital media. In addition, there are many other traditional forms of music licensing such as musicals, karaoke, greeting cards, toys, lyric reprints, ringtones and many more (Brabec & Brabec, 2006, pp. 30-56).

"The gaming industry is the king of the entertainment business." (Wilsey & Schwartz, 2010, p. 218) For the game audience gaming is a lifestyle and culture. A growing part of population uses more time with games than with any other media such as TV, radio or even the internet. Licensing music for games is much like licensing for films. The game's mood and environment are big factors to what kind of music is licensed (Wilsey & Schwartz, 2010, p. 218).

Synchronizing music to games is an emerging field and especially in Finland should be a high priority as the Finnish gaming industry has shown massive growth in the recent years. The Finnish music industry numbers are needless to even compare to the value of the Finnish gaming industry. The total turnover of the Finnish gaming industry was nearly 300 million in 2012. Globally the gaming industry reached value of nearly 100 billion in 2013. (Hiltunen, Latva, & Kaleva, 2013).

Nonetheless, all these synchronization channels are not separated from each other. As nowadays major corporations own media coverage for many outlets, music synchronization opportunities are likely to appear. Marko Pohjosmäki gave an example about Nelonen Media's music synchronization. In 2009 Doom Unit was the winner of the first Radio Rock Starba -band contest on Radio Rock, a radio channel under Nelonen Media. The TV channel Nelonen was launching a new horror TV show called Harpers Island, and Doom Unit's song Killing Time was featured on the considerably frequently running TV and radio advertisements of the show. Doom

Unit reached significant exposure, the TV show was a hit and all parties benefitted. (Prinkkilä, Tolppanen, Kortelainen, Klemetti, & Pohjosmäki, 2013).

The cooperation between the creators of the game Angry Birds and rock musician Slash gives an example of music synchronization in games, the power of social media and brand entertainment. The music, the name and likeness of Slash were used in Angry Birds games after the musician expressed his interest and fandom towards the game in social media. Slash even recorded his own version of the Angry Birds tune. Both parties received immense fan and user exposure (Prinkkilä, Tolppanen, Kortelainen, Klemetti, & Pohjosmäki, 2013).

Brand entertainment is not music- or synch licensing as it is not about licensing rights of a song, but the name and likeness, the trademark of an artist. However, it is a form of licensing to be considered and worth mentioning. "The idea of brand entertainment is a bit like rolling sponsorship, licensing and advertising into one single ball." (Wilsey & Schwartz, 2010, p. 198)

An example of brand entertainment would be subtle product placement in a music video for anything from instruments to clothing and beverage. By using the celebrity's name and likeness the product gains a certain trust from the public, and adds to its credibility and marketing value. These deals can be highly lucrative and do not even require for the artist to be extremely popular, just credible (op. cit. p. 198).

3 METHODOLOGY

3.1 Research Problem and Questions

The aim of this study was to elaborate the importance of music synchronization for Finnish music companies. Moreover, the aim was to examine the extent of the effort the companies were willing to invest in it. The research findings should help Music Finland to understand the potential of music synchronization in relation to the resources invested in its promotion.

The research questions were determined based on the “Theoretical Framework” as well as the needs of the assignor. The theoretical overview of music synchronization indicates that music synchronization is a potential source of revenue for music companies on many fields within the music industry. Thus the focus of this study was on the significance of international music synchronization from the perspective of Finnish music companies and on their plans to continue to invest in it?

Research questions:

1. How significant is international music synchronization for Finnish music companies and why?
2. How significant will international music synchronization become in the near future?

3.2 Research Method

There is no existing systematic research data about international music synchronization. Therefore a qualitative research method was chosen for this study. Furthermore, the concepts of significance are a "phenomena relating to or involving quality or kind" (Dhawan, 2010). According to Dhawan (2010), qualitative research is subjective assessment of attitudes, opinions and behavior.

The chosen data collection method was interviewing. In order to discover answers to a yet undefined topic, interviews were seen the best way to collect considerable amounts of qualitative data. The interviews conducted were semi-structured theme interviews. The semi-structured interview model uses themes that are defined

beforehand as well specified questions that are related to the themes (Tuomi & Sarajärvi, 2002). The interview themes were derived from the “Theoretical Framework” and incorporated into a semi-structured theme interview. The questions were presented in a similar fashion to each professional. However, some of the interview questions were modified along the job and field of the interviewee, and additional questions were asked about topics that emerged during the interview.

Moreover, content analysis was constructed around the same themes. According to Tuomi and Sarajärvi (2002), the theme analysis method emphasizes what is said around each theme. In qualitative research, the interview data is extensive, and a thematic data analysis helps to confine the interview data to the results that respond to the research questions. The research data was examined through the analysis themes and presented in the “Results” section progressing from the broad subjects towards more specific themes concerning action and the core of the research questions.

Hardly any studies have been conducted on the significance of music synchronization anywhere even though synchronization has been a significant part of the music industry for a long while already. The role and significance of music synchronization is mostly common knowledge among music industry professionals, which is why a qualitative study in the form of interviews was deemed best for discovering how people in the Finnish music companies recognize the significance of international music synchronization.

3.3 Planning and Implementation of Interviews

The research sample consisted of eight Finnish music industry employees that have shown interest in international music synchronization. The Executive Director of Music Finland Tuomo Tähtinen selected the group out of the participants of Music & Media Sync Summit events of 2012 and 2013 with the help of the author. The research sample represents the author’s and Tuomo Tähtinen’s opinions of as balanced a sample as possible of the Finnish music industry companies that have expressed interest in international music synchronization. Entrepreneurs are an important client group to Music Finland, through the financiers, which is why all the

interviewees represented different music industry enterprises. The research sample consisted of all-round music professionals, representatives of publishers and record labels, artist managers and a part-time synch agent. The interviewees were Jussi Hautala, Head of Artist Management at Result Entertainment; Heta Hyttinen, Manager of i.a. Amoral and For the Imperium; Jaana Karila, CEO of Konkursi Records; Ville Kilpeläinen, Head of International of Fullsteam Records and Publishing; Marja Kortelainen, Creative Manager of Warner/Chappell Music Finland; Anna-Maria Rusi, Music Export Consultant and Synchronization Agent at Fox Force One; Jouni Tamminen, CEO and A&R at Exogenic Music Group and Eero Tolppanen, Head of A&R at Elements Music.

The chosen professionals cannot be said to represent the whole Finnish music industry, which is why this study cannot define how important music synchronization is in the export operations of all Finnish companies in general. However, it can be determined whether music synchronization is significant for a prominent group of Finnish music export companies. Moreover, it is possible to determine whether Music Finland should continue its efforts in the field of music synchronization to help Finnish music companies take their music abroad by means of music synchronization. Finally, Music Finland would like to determine what the potential of international music synchronization is in comparison to the resources used.

The interviews were constructed of themes presented in the following chapter "Interview themes", which arose from the "Theoretical Framework" as well as from the assignor's wishes. The interview model was that of a semi-structured theme interview. A list of questions was created, and they varied with the job and field of the interviewee and the topics that emerged during the interviews. In order to avoid leading the questions were as open as possible. Some interviewees struggled slightly with the broadness and vagueness of the questions, and the desired kinds of answers were not obtained for specific questions right away. However, the interview themes were eventually all addressed by additional questions. The interview questions were pre-tested by discussing with two Music Finland employees.

The participants were contacted by phone and asked whether they would like to take part in the research. In addition, the times for those meetings were agreed on. The

interview questions were sent beforehand to the interviewees, who requested it. The interviews were conducted in person in Helsinki between the 6th and 13th of February 2014, except for Kilpeläinen who was interviewed from Paris via a video-call. The interview language was Finnish, the native language of both the author and all the interviewees.

3.4 Interview Themes

To answer research question one: “How significant is international music synchronization for Finnish music companies and why?” the professionals were asked to define the starting point of the music synchronization business and the outlook of their interviewees towards it. This was how the role and state of music synchronization in the entity of the whole music business in Finland were covered. To define how significant synchronization was, the measurements of the benefits were discussed as well as the assessment of the actual significance for each company. Synchronization in export and international music business were themes that were carried through the interviews in many questions.

To define the future significance of synchronization, the companies were asked to estimate synchronization’s future significance for their companies and for the whole music business in the near future. The role of music synchronization in their export strategies and visions were also discussed, as well as their investments and future actions in international music synchronization. Additionally the professionals’ synchronization achievements were discussed.

The same themes were carried along to the research data analysis. The themes were analyzed one by one, by collecting the relevant data under each heading, finding matters that professionals agreed or disagreed upon and by presenting their other relevant opinions and ideas.

4 RESULTS

4.1 Role of Synchronization in Music Business

When asked about the role of music synchronization in the entity of music business, many of the interviewees said first that the role was or had been growing. The change could be seen in the fact that synchronization was emphasized in international music conferences, the music business media and that there were new instances operating in the field of music synchronization. Rusi had noticed IFPI (International Federation of the Phonographic Industries) reports including synchronization-related numbers from the last few years. Synchronization is now identified as its own business sector.

Music synchronization was seen as a potential revenue source and artist promotion channel. At some point of the interview all the interviewees stated that synchronization could be a marketing or promotion channel for artists.

”No se on aika laaja itseasias se rooli [musiikin synkronoinnin koko musiikkiteollisuuden kokonaisuudessa] jos sitä ajattelee ihan kaikkien toimijoiden näkökulmasta. Musiikintekijöille, joita me siis tietysti edustetaan - se on niinku lähinnä sitä musiikin kaupallistamista, elikkä siis ansaintapotentiaalia. Sitten tietysti jos puhutaan esiintyvistä artisteista ja labeleistä se voi toimia myös tietysti promokanavana. (Well it’s quite wide actually, the role [of music synchronization in the entity of music business] if you think about it from all the actor’s perspectives. For music makers, who we of course represent – it is like mostly the commercialization of music, ergo earning potential. Then of course, talking about performing artists and labels, it can also function as a promotional channel.)” Eero Tolppanen

The change in consumption habits originating from the change in technologies was recognized. Hyttinen explained that games and movies were often the sources of new music nowadays. In addition, Tamminen, Tolppanen and Karila noted that the traditional earning model, i.e. selling records, was not enough anymore, hence synchronization became one of the sources of new income. Hautala maintained that the business of music synchronization meant bringing forth new music and artists,

and that with their music choices music supervisors could have a great influence on the overall culture and music consumption of people. Hautala gave the example of the TV show OC which in part lifted indie rock music to an entirely different level.

”Ei voi väheksyä sen mahtia, että kuinka paljon sil on merkitystä et sun musa kuuluu toisessa kontekstissa, kun itse siinä albumilla. (You can’t disregard the power of how much it matters to have your music heard in another context than on the album itself.)” Heta Hyttinen

Of all the interviewees, Kilpeläinen had the least opportunist, however a positive, view towards synchronization. Interestingly, Kilpeläinen also listed the most synchronization successes. Kilpeläinen emphasized that music synchronization’s significance was growing but that it was still not the most important sector. As a sector it was significant but only for a few it was the main source of income. It was seen as something that did not bring sufficiently significant revenue to the whole industry so as to revolutionize the business.

Many of the interviewees recognized that the business of music synchronization was very challenging. Rusi, Tolppanen, Karila and Hyttinen described the business as very delicate. A good song is not enough rather the song must be suitable for a specific visual production. The productions are often works of art and require a very specific ambience and kind of music. Some music is much more suitable for synchronization than other. Specific kinds of music need their specific kinds of productions. Even if one worked very hard, there would be no guarantee for success. Tolppanen, Hautala and Rusi all noted that representing a large catalogue of music would significantly improve the chances of successful placements especially when representing existing songs. The supervisors would more often turn to people with large catalogues, and with a large catalogue of music there would more often be something to meet the supervisors’ specific wishes and the possibility to offer many options. Tamminen and Rusi both told that knowing the music supervisor, their specific tastes, and ways of working created an advantage and it was therefore useful to study the supervisors before offering them music.

4.2 Synchronization and the Finnish Music Industry

In general the interviewees felt that in Finland the music synchronization culture was not quite as developed as compared to many other music markets. However, the attitude towards it was positive. The Finnish music industry is so small that production companies deal directly with music companies or even musicians themselves. Rusi mentioned that abroad all the prominent indie music labels had their in-house synchronization departments and that there were synchronization agencies. Kortelainen mentioned that Warner/Chappell Scandinavia had people working full-time only for synchronization, as opposed to synchronization being among all the other publishing activities. A few interviewees said that music synchronization in Finland was in its infancy. According to Rusi, synchronization agents were not needed within Finland since the music industry and audio-visual industries were so small that it was easy for authors and operators to network. Tolppanen and Karila suggested that the lacking of managers and agents would result from the small size of the Finnish music market.

”Ehkä just toimintatavoissa [on eroja muihin musiikkimarkkinoihin], että ei ole niitä supervisoreita. Tää on vaan niin pieni maa et se toimii pikkasen erilailla. (Maybe just in the procedures [there are differences from the other music markets], that the supervisors do not exist. This is just such a small country that it works slightly differently.)” Marja Kortelainen

Tamminen told that there were instances within the Finnish music industry that considered synchronization such a difficult way to make business, or at least the attitude is so cynical, that they have decided not to try at all. Certainly, they do answer inquiries, but do not market their music for synchronization. Kilpeläinen thought that the music users were reluctant to use existing music. The process is often perceived too complicated, and there is much prejudice about the complexity of the business or the price. In Finland, production companies do not see the use of music as powerful as they do in the USA or Great Britain. Hyttinen said that usually the most difficult part was to identify all the right holders of music, and that IMMF (International Music Managers Forum) was working on trying to simplify the process so that the production companies would receive the information about the right holders more effortlessly. For Warner/Chappell Finland the domestic synchronization

was very significant because of their large catalogue of Finnish music. Kortelainen told that in Finland, music users often wanted to synchronize the back-catalogue of Finnish classics that stir up strong feelings amongst consumers.

However, Finland is by no means the most undeveloped country. Tamminen mentioned that one of the music supervisors in 2013 Sync Summit in Tampere had said that in the whole Europe there were only 20 people that could actually offer music for synchronization. Music Finland's Sync Summits have already brought valuable know-how to the Finnish industry. Rusi felt that the Finns were privileged to have their own Sync Summit. Two interviewees said that the Finnish music industry people did know how to handle international synchronization related issues when they came across them.

Kortelainen explained that since Teosto administered synchronization and acted almost like a synchronization agent, it could be the reason why synchronization agents have not emerged in Finland. In addition, Kortelainen told that since about 80% of Finnish writers were unpublished they needed this kind of service. However, the problem for a large corporation like Warner/Chappell Music with Teosto is that they would like to take care of all their synchronization activities to make a better business out of it, which is what Teosto as a non-profit organization does not do. Teosto does take a commission out of all the synchronization, even in case that the price is determined by the right owner and all contact regarding the license had happened between the right owner and licensor.

Tolppanen explained that in Finland performance monies were relatively significant in income formation for music publishers. For music synchronization the front-end fees were the most significant, and performance income came second. Additionally, two other interviewees said that abroad the most significant and apparent income was the front-end flat fees. Tolppanen explained that roughly 70% of all Finnish music was in the Finnish language and therefore the whole catalogue of Finnish music that could be offered for international synchronization was relatively small. However, Rusi noted that there was a great deal of obscure back-catalogue of artists on small indie-electro labels and that the Finnish indie-electro reputation was almost as strong as the Icelandic brand.

4.3 Music Synchronization in Export

The first interview question that was asked from all the interviewees was why they had participated in Music Finland's Sync Summits. Kilpeläinen answered: *"Synkka on selkeästi yhä tärkeämpi osa artistien tuloja ja nimenomaan vielä viennissä.*

(Synchronization is clearly more and more important share of artist's income and in export in particular.)"

Many of the interviewees said that music synchronization had a small or insignificant role in music export at the moment. However, they agreed it could be more significant. Two interviewees mentioned that funding instruments for independent synchronization-related travels were missing for Finnish music industry companies. All the interviewees indicated that they saw potential in foreign synchronization. Kilpeläinen and Tamminen said synchronization would be a significant income stream along with the other important channels.

Interviewees mentioned that synchronization was a chance to break artists to foreign markets, and that successful international synchronization could be a major issue. It is a tool to gain conspicuousness on a foreign market, and it can work as a PR tool within the industry, as well as help to achieve valuable distribution deals and agents on foreign markets. Kortelainen added that a single fortunate synchronization might bring many more, which could be a substantial kick-start for an artist's career as well as it could enable touring and other activities. Kortelainen mentioned the band NONONO whose song "Pumpin Blood" has been synchronized considerably to many different productions lately, which has raised awareness of the band and enabled them to tour internationally. Tolppanen noted that Isac Elliot's whole success started with synchronization within Finland. Kilpeläinen indicated that he did not believe that alone by synchronization, Finnish artists could make sustainable impact on foreign markets. However, music synchronization has a significant role in export.

"Jos saat todella hyvään paikkaan biisin, se on mainos mitä ei voi ostaa millään rahalla. (If you get a song in a really good place, it is an advertisement no money can get.)" Heta Hyttinen

It seems that the professionals believed especially in the power of synchronization as a marketing tool in export. Kilpeläinen explained that music synchronization

placements were important in foreign markets as a promotional tool, since it was very difficult as a foreign band to catch attention of the local media. Hyttinen noted the case of the Finnish band Poets of the Fall that was featured in a Max Payne game about a decade ago. Hyttinen said that the band could ride with the success of the game for quite a long time and they could have used it in the promotion of the album that followed.

The professionals saw the international synchronization's earning potential to be much bigger than the domestic. Tolppanen, Hautala and Tamminen said that major successes abroad in larger markets could generate much more income than accomplishments in the Finnish market. The interviewees were asked why they focus on export. The reasons told were that the earning potential was better, the Finnish music market was small and limited, personal ambition, that there was no use in making music in English in Finland if they should only perform within Finland, and that the bands themselves made music while dreaming of going international.

Kortelainen explained that synchronization could be in a major role in the export strategy of an artist. Kilpeläinen told that their company's focus in international events was nowadays more to meeting people that represent games, films or different brands rather than meeting labels, which was largely what it was before. Three interviewees told synchronization was a part of their export strategies along with trying to grow all of the other sectors of operation.

4.4 The Profits and Benefits of Synch for Finnish Music Companies

The interviewees were asked how they determined the benefits of music synchronization. The first measurement mentioned was revenue. For most companies in the research sample, synchronization had so far generated very little, none, or an insignificant amount of income. Still, even the companies that had so far no income generated over synchronization were very optimistic about the potential of synchronization as a significant revenue source. Moreover, among the independent companies, it appeared that the more experience the company had over success in synchronization the less optimistic they were about the potential as an income source. However, no one denied the importance of music synchronization

in the music business. Hyttinen described that at the moment the percentage to really succeed in synchronization and, for example, have a hit because of being part of a movie, was probably not as but nearly as low as getting hit in the head by a lightning.

Kortelainen told that for Warner/Chappell Music Finland synchronization income was already significant. The reason was the immense catalogue of Finnish music that Warner/Chappell represented including many Finnish songs that had formed classics. In addition, she told that most of the synchronization income was generated within Finland and that the income generated in foreign territories was not as significant yet. Only, she and her organization saw that international synchronization was a potentially significant income source. Tamminen said synchronization was not a primary field for their company but was beginning to have a significant share.

Three interviewees mentioned that aside from placing existing songs, the more lucrative income source would be selling composers and songwriters to write customized work for TV, commercials, or movies, in other words writing commissioned score. Rusi mentioned that her focus as a synchronization agent was mostly on representing composers and music creators who were capable to score for picture for a bespoke commission. Partially, that was because a score in many cases generated both her and the musician better income than placing existing songs. Rusi reminded that synchronization was a market of possibilities for other music creators beside artists as well. It is an important and very concrete source of income for composers.

Hautala explained that the results of a successful synchronization would show indirectly in the income streams as all the other sectors of the artist grew along with the conspicuousness of the artist. The other indicators to measure the benefits of synchronization that were mentioned by the interviewees were the success and stature of the audio-visual production in question, media coverage, the reaction of a music supervisors, as well as the publicity and marketing value.

“Kyl se on niinkun ensinnäkin A, se taloudellinen hyöty. Se on niinkun se selkein - - ja sit ehkä sen jälkeen tulee se näkyvyys tai muu markkinointiapu, mitä se yhteistyö vois tuoda siihen. Eli otetaan vaikka elokuva, että missä

kaikkialla se... missä se jaellaan, käytetäänkö sitä musiikkia sen TV-kampanjassa, sen elokuvan eli näkyvyys tai se tavoitavuus, mikä sillä saadaan. Tavoitavuus on tärkeimpiä sen jälkeen kun on määritelty, että onko se niinku ylipäätään järkevä. (Well it is like first of all, A, the financial gain. That's like the clearest - - and maybe after that comes the visibility or other marketing assistance, wherever it... that where it's distributed, is it used in the TV campaign, what's the movie's visibility or reach that is gained. The reach is among the most important after defining whether it's reasonable in the first place." Ville Kilpeläinen

With a twinkle in her eye, Hyttinen cited the saying "All publicity is good publicity". Kilpeläinen and Karila both noted that all synchronization was not automatically positive. Kilpeläinen listed the public image as a benefit for synchronization but emphasized that it should first be determined whether the synchronization was actually a positive influence for the artist brand. As an example McDonald's would not always be a positive brand association.

4.5 The Significance of Synchronization for Finnish Music Companies

Most interviewees said music synchronization was not significant for them financially. However, it was significant as a sector that could and should be developed. Most interviewees hoped and believed it would be more important in the future.

Kilpeläinen, who represented both Fullsteam Publishing and Records, said that music synchronization was more significant for a publishing company than for a record company. However for a record company, the significance of music synchronization was increasing and rising among the most important sectors. Tolppanen said that music synchronization was one of the tasks of a publishing company to create income for songwriters. However for a publishing company, that only handles publishing, synchronization is not in their charge alone, since a song needs an artist first. According to Tolppanen and Kortelainen, synchronization was a very significant income source for a publishing company.

For a record company, synchronization was chiefly a part of the potential income among other sectors. Tamminen would like to see success as the entirety of release, live and synchronization all in one on a foreign market. All of the sectors support each other:

“Ja mä haluan nähdä sen niinku kokonaispakettina, että on julkaisutoimintaa muualla, on keikkatoimintaa ja on synkronisointia, että ne kaikki tulevat ikään kuin samassa - tai se olisi ideaalitalanne. Tietenkään ei olla sitä vastaan, että tulee niitä onnistumisia vaikka ei olisi sitä julkaisutoimintaa. Senkin näkee, että kaikki kuitenkin tukee toisiaan vahvasti. (And I want to see it as a whole package, that there all the operations: release, live, and synchronization, that they would come all in one – or that would be the ideal situation. Of course we’re not against the successes although we wouldn’t have the release. You can see that all, however, support each other firmly.)” Jouni Tamminen

Hyttinen emphasized that foreign synchronization was not always global and there was no reason to focus on only international campaigns. Tamminen agreed that synchronization placements should be attempted together with other activities on the target market. Again, foreign market synchronization could act as an unparalleled marketing and promotion tool for artists and could assist in international breakthroughs, according to Hyttinen.

For music managers, synchronization was a way to actively search for new income and marketing channels for their artists. Hyttinen told that the Finnish branch of IMMF has begun active cooperation with sports’ and arts’ managers to find ways to exploit the combined know-how to benefit all parties. Hyttinen wishes synchronization would be more and more important for her and her artists. For Rusi, who is a part-time synchronization agent, synchronization has naturally played an important part for her livelihood.

Kilpeläinen and Rusi indicated that for many Finnish composers and songwriters, music synchronization was the major income source because they wrote score for various audio-visual productions. Rusi would like to encourage other writers take up audio-visual productions as well. Rusi explained that writing TV score could even be artistically more rewarding than writing songs for a specific artist brand. Kortelainen

explained that potential synchronization success was a factor that was looked at when signing new bands and songwriters. The promise of trying to sell a great deal of synchronization was one of the factors the record company or publisher could offer the artist.

Kilpeläinen listed many accomplishments they had already achieved in the field of international music synchronization. The significant ones were always results of active labor and had brought financial benefit and/or substantial visibility.

4.6 The Future of Music Synchronization

The whole research sample was in the most unison with the fact that the significance of music synchronization would grow in the near future. The reasons reckoned were that mundane marketing was not as effective as it used to be, new kind of interesting content would be created, on-demand consumption, the switch from print to online, and further increase of digital audio-visual content on the internet. Tamminen said the significance would surely grow in export. However, he was not sure if it would in the entity of music business.

”Merkitys varmaan kasvaa, pyydetään varmaan enemmän hintaa, koska jostain niitä tuloja on saatava, niin sitten ala voi kasvaa. Siitä tulee tärkeätä, koska kulutustapa menee koko ajan enemmän on demand. (Probably the significance will grow, more money will be asked, since you need to get the income somewhere, and then the business can grow. It will become important because the consumption will be more on demand.)” Jussi Hautala

Kortelainen estimated that games would continue growing as an important synchronization platform, and when new platforms emerge the music industry needs to be aware and aboard:

”Mä uskon, että koska se on edelleen tärkeätä, se on viiden vuoden kuluttua vielä tärkeämpää. Mä uskon, että viiden vuoden sisällä maailma tulee muuttumaan. On toi pelimaailma, ja voi tulla vaikka mitä uusia platformeja... (I believe that because it is still important, in five years, it will be even more

important. I believe that in five years the world will change. There's the world of gaming, and all kinds of platforms could emerge.)" Marja Kortelainen

The amount of music uses and the overall synchronization income for the whole industry were evaluated to grow. At the same time Hyttinen estimated single compensations to become smaller since production companies had less money to spend. Most of the interviewees hoped and believed music synchronization would be more important for them in the future.

4.7 Investing in Music Synchronization

Six interviewees mentioned that acquiring new contacts and maintaining ongoing relationships was the primary investment for music synchronization. To be conceived as partner that was competent and easy to operate with was important for the interviewees. All of the interviewees answered they thought investing in synchronization was important and that they planned to do so. Four interviewees, however, questioned if they would have the time and resources for all the efforts that would be needed to achieve the wanted goals.

"Järkevään se [panostaminen musiikin synkronisointiin] olisi... - ...mutta eri asia on pystyykö sitä tehdä, saako muut vakuutettua ja riittääks siihen rahkeet... (It would make sense [to invest in synchronization]... - ...but it's another matter if I can do it, convince others and if I've got what it takes...)"
Jussi Hautala

Karila and Tamminen mentioned to continue to muster synchronization-related know-how and many interviewees planned to attend Music Finland's Sync Summit and other networking events around the world.

"Tavallaan investointi on verkostojen ylläpitämistä. Musiikkibisnes on niin ihmisbisnestä, että panostus on se että mennään kansainvälisiin tapahtumiin ja pyritään tapaamaan näitä ihmisiä. (In a way the investment is keeping up networks. The music business is such a people business that the investment is that we go to international events and try to meet these people.)" Ville Kilpeläinen

Kortelainen told that Warner/Chappell had incremented Nordic cooperation to increase music synchronization between the Nordic territories and above. Moreover, there was organizational pressure to increase the potentially significant share of international synchronization income. Rusi was already working as a part-time synchronization agent and it seemed that other parties planned to develop their synchronization-related actions and that new agency-level synchronization activity would be forming within the Finnish music industry.

5 DISCUSSION

5.1 Summary of the Results

It can be concluded on the basis of the research results that for the interviewed music export companies, the field of music synchronization is more significant at large as a field of operation than alone as an income stream. Based on the interviews, it seems that international music synchronization has had little or no significant effect on the income streams of Finnish music export companies. Still, international synchronization is viewed as a potential channel for future earnings. The research sample professionals believe in the potential of music synchronization although so far it has shown to have little financial effect. However, it appears that the benefits of music synchronization are not to be measured only in terms of primary income: license fees and performance income, but also in terms of secondary and indirect benefits: publicity value and exposure.

The interviewed professionals predict that a major synchronization success will increase the income streams through other sectors such as sales of live shows, physical and digital recordings, as well as streaming, and merchandise. In other words, they have a positive impact on the overall success of the artist. However, some interviewees thought that one should consider that not all effects of synchronization were always positive. Placing a song in association with a wrong brand can be negative exposure and publicity to the artist brand. For the publishing side synchronization is seen as earning potential to the songwriters, and the record company side looks more at the possible promotional gains and marketing help. One interviewed record company representative told that their company had recognized the significance of synchronization for the growth in the income streams as well.

In music export, music synchronization is firmly perceived as a possible channel to aid an artist's breakthrough to foreign markets. Synchronization is a way to promote an artist in a foreign market as it is otherwise difficult to attract the attention of the local media. For songwriters and publishers synchronization is chiefly earning potential. For the Finnish record companies, international synchronization should go

hand in hand with other operations such as live shows and the release of recordings of an artist in order to achieve a significant effect within a specific foreign market.

It can be concluded that the significance of music synchronization will grow in the near future and the importance of synchronization as both an income and promotional channel will be emphasized. The efforts and investments towards synchronization have been growing among the Finnish music export companies for the past few years and will continue to grow according to the research sample.

A prominent group of Finnish music companies do certainly consider investing in international music synchronization to be important for the future success of their companies as well as their writers and/or artists. Acquiring and maintaining ongoing relationships with the synchronization-related contact network is perceived as the most important investment. This requires especially personal contact: bringing the music supervisors and other synchronization-related contacts to the Finnish music industry and/or providing the opportunity for Finnish music industry representatives to travel to meet them.

A challenge concerning international music synchronization and the Finnish music industry came up in the interviews: the size and structure of the Finnish music industry and absence of agencies and managers. The reason behind the problem appears to be the small size of the Finnish music industry and market as well as the missing culture of management companies and agencies for Finnish music.

Moreover, the Finnish music market's requisite in terms of catalogue is not the best possible for foreign markets. However, at present the agency-level for music synchronization appears to be forming within the Finnish music industry, as well.

5.2 Limitations

The fact that the interviewees knew that the present study had been commissioned by Music Finland, is to be recognized as one that may have affected the emphasis of the answers. The author infers that attitudes towards synchronization were shown in a slightly more positive light than what would be the reality. In many interviews it could be detected that the positivity of attitude towards synchronization grew over the course of the interview, which affected especially the answers to the questions

concerning investments in music synchronization. It can be concluded that the actual investments to be made by the interviewees in synchronization would not entirely match the answers in this interview. Moreover, the visions and hopes of some of the interviewees towards music synchronization seemed unrealistic compared to the planned investments, which might indicate that the hopes and beliefs in the potential of international music synchronization for Finnish music companies might be unrealistic.

Concerning the implementation of this study, Finnish research on the business of synchronization is inadequate hence American and British literature had to be adapted to the theoretical basis. Moreover, the interview language was Finnish and the report was written in English. This might have caused interpretation issues in translation. Eight interviews produced a great deal of research data what was not simple to analyze. However, the thematic data analysis method was a practical way to elicit the kind of data that would answer the research questions. The author's inexperience of prior academic research complicated the process. Additionally, the author is an employee of the assigning party, and bias could have affected the selection of the research sample by both the author and Tähtinen.

The choice of the research sample naturally greatly affects the end result. It would have been interesting to also interview musicians on their perspectives and foreign music industry and visual industries representatives as experts of the subject. However, the author chose to confine the research sample to Finnish music industry enterprises in order to obtain a clear result from one perspective, the perspective of enterprises, the customers of Music Finland. If the group had been selected from random music industry companies, the results might have been significantly different, since the research sample was chosen from enterprises that had already shown interest in music synchronization. However, professionals who were acquainted with synchronization were chosen in order to gain more reliable qualitative data.

Qualitative research cannot simply answer the question "how significant" and this study did not concentrate on the measurable significance, rather the focus of the study was to examine what made synchronization significant and if it is for the

interviewed professionals and their companies. According to Tuomi and Sarajärvi (2002, p. 133), the reliability and neutrality of observations should be analyzed considering the objectivity of the study. In qualitative research it is admitted that the author's expectations and prior experience inevitably affect the results of the study.

6 CONCLUSION AND FUTURE SUGGESTIONS

The study shows that music synchronization is a significant part of the entity of music business. For Finnish music export companies, it is more significant at large as a field of operation than alone as an income stream. Finnish music professionals recognize the potential in music synchronization and are keen to invest in it.

The significance of international music synchronization will grow as the music industry reshapes. It is a way for music companies to bring artists to the foreign markets, but in most cases not alone. Other fields of activities such as record releases, live shows and other promotion operations are needed simultaneously for a sustainable financial impact.

Synchronization has an especially great potential in music export. It can have a substantial role in penetrating new markets and should be included in a market strategy of exporting bands and artists. Synchronization has so many multiplicative effects that it should be considered an important business sector for music industry companies. There are many examples of today's artists who have launched their international careers with the help of synchronization and there is no reason why we could not witness a similar success story in Finland in the near future.

Comparing the foreign literature with the research findings, the Finnish music industry is very much a beginner in international music synchronization and the recognized potential is chiefly yet to be exploited. Music synchronization provides a tool for a possibility of a major breakthrough on a foreign market. However, not all fortunate placements in international music synchronization automatically bring significant results. It requires continuous efforts and a vast contact network that is utilized effectively.

Surprising was synchronization's currently low financial rank for most of the interviewed companies compared with the possibilities presented by literature. However, the companies do recognize the potential and seem to be working towards achieving the possibly significant income streams. Moreover, they hope and believe synchronization will grow in significance.

Music synchronization is often perceived to be a difficult operation sector for its coincidental nature: even years of work might not bring many results, and even when successful placements are accomplished, they might not bring significant results. However, there is always the possibility for a major breakthrough. Finnish music companies are so small that they do not have much time or resources to concentrate on music synchronization, which requires plenty of time but promises no guaranteed results. In fact, the chances of getting a specific song for a specific production are very narrow. Audio-visual productions are often delicate works of art. Moreover, not all music is suitable for synchronization.

Some foreign synchronization agencies seem to be managing and making a decent business even today. The author would like to see professional synchronization agencies in Finland that would represent a large catalogue of music and the independent labels and operators that do not have time or resources to handle international synchronization fortunately themselves. If the professionals' predictions would come true and synchronization became a more and more important sector in the music industry, the agencies could achieve remarkable success. Existence and prosperity of Finnish synchronization agencies would benefit the success of Finnish music altogether.

The structure of the Finnish music industry does not provide the best possibilities for prosperity in international music synchronization. Thorough promotion of international music synchronization would require assisting the overall prosperity of the industry in Finland and the evolution of professional operations of managers and agents and, moreover, providing the industry know-how, valuable contact network and an opportunity for financial aid for synchronization-related activities.

As to evaluate the validity of this thesis, the author sees that the study answers the question of how significant international music synchronization is for Finnish music companies by defining why synchronization is significant for the music business and the companies. Moreover, the factors that contribute to music synchronization's significance were discussed. The study communicates Finnish music industry professionals' perceptions on the importance of music synchronization in the future compared with the present day. The author considers the research reliable within all

the factors and limitations determined in the study. For Music Finland the study will serve as an instrument to assist in decisions regarding their music synchronization-related activities.

Altogether, the author is happy about the choice of thesis topic. Music synchronization is a topic that combines music industry and the other entertainment industries, and therefore qualifies appropriately for a for Music and Media Management student's thesis. In future studies, synchronization could be researched thoroughly from the two very different viewpoints of synchronizing existing music and commissioned score. In the business of music synchronization, there are many interesting angles to study. For example, the aspect of synchronization in music export could be studied thoroughly and compared with such of other music markets. The views of music supervisors and foreign music industry representatives could be examined to construe a broad view of the role synchronization plays in exporting bands and artists. Then, the practices of the synchronization business on a specific market could be scrutinized to help foreign artists and music companies enter the territory. Moreover, it would be interesting, yet difficult, to explicitly determine how music synchronization appears in the revenue of music companies through the indirect benefits. Further, the concept of music synchronization could be extended to brand entertainment and study what synchronization music and artist brand's users might gain for their own brands by exploiting the music and brand image of an artist.

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8 APPENDICES

8.1 Appendix – Interview questions body

Alustavat kysymykset

1. Osallistuit Music Finlandin Sync Summitiin 2012/2013. Kerro miksi?
2. Ketä artisteja/kirjoittajia edustat / olet edustanut synkronisointiin liittyen?
3. Miksi teet musiikkivientiä? / *suuntaat ulkomaille?*
4. Teetkö tai aiotko tehdä töitä kansainväliseen musiikin synkronisointiin liittyen ja miksi?

Synkronisointi tällä hetkellä

5. Miten kuvailisit musiikin synkronisoinnin roolia koko musiikkiteollisuuden kokonaisuudessa?
6. Miten kuvailisit musiikin synkronisoinnin roolia kustannusyhtiön/levy-yhtiön/artistin/kirjoittajan menestykselle?
7. Miten kuvailisit musiikin synkronisointikulttuuria Suomessa? *Miten Suomessa tehdään ja suhtaudutaan musiikin synkronisointiin?*
8. Oletko huomannut eroja suomalaisessa synkronisointikulttuurissa verraten muihin musiikkimarkkinoihin? Mitä?
9. Mikä on mielestäsi synkronisoinnin rooli suomalaisen musiikin viennissä? *Mitä se on tällä hetkellä ja mitä se voisi olla?*
10. Millaisina tuloina musiikin synkronisointi näkyy yrityksellesi / edustamillesi artisteille?
11. Miten mittaat musiikin synkronisoinnin hyötyjä yrityksellesi?
12. Kuinka tärkeää musiikin synkronisointi on yrityksellesi yleensä (Suomessa & ulkomailla)?
13. Kuinka tärkeää musiikin synkronisointi on yrityksellesi viennin kannalta? Miksi nimenomaan viennissä?

Synkronisointi tulevaisuudessa

14. Kuinka tärkeää arvioit musiikin synkronisoinnin olevan yrityksellesi viennin kannalta viiden vuoden kuluttua ja miksi?
15. Miten arvioit musiikin synkronisoinnin merkityksen kehittyvän koko musiikkiteollisuuden kokonaisuudessa lähitulevaisuudessa?
16. Mikä on tulevaisuuden visiosi kansainvälistymisestä (yrityksen & artistiesi) ja miten synkronisointi liittyy siihen?
17. Miten musiikin synkronisointi näkyy yrityksenne vientistrategiassa?

18. Koetko tärkeänä panostaa ja investoida musiikin synkronisointiin ja aiotko?

19. Mitä suunnittelet tehdä lähitulevaisuudessa kansainvälisen musiikin synkronisoinnin saralla?

+ extra

20. Mikä/mitkä mediat (tv, elokuva, pelit, mainokset ym.) ovat sinulle merkittävimpiä synkronisoinnin kannalta ja miksi?

21. Onko työ kansainvälisen synkronisoinnin parissa jo tuottanut tulosta? Mitä? *Ovatko tulokset olleet aktiivisen työn tuloksia, ovatko ne olleet merkittäviä yritykselle/artistille?*

22. Muuta mainittavaa aiheeseen liittyen?