

# EMI Group PLC

*In this Internet age, the consumer is using music content more than ever before—whether that's playlisting, podcasting, personalizing, sharing, downloading or just simply enjoying it. The digital revolution has caused a complete change to the culture, operations, and attitude of music companies everywhere. It hasn't been easy, and we must certainly continue to fight piracy in all its forms. But there can be no doubt that with even greater commitment to innovation and a true focus on the consumer, digital distribution is becoming the best thing that ever happened to the music business and the music fan.*

—Eric Nicolli, CEO, EMI Group<sup>1</sup>

In early spring of 2007, Martin Stewart drove through the darkened streets of Kensington in West London. As chief financial officer (CFO) for global music giant EMI, Stewart already knew most of the news that would break at the company's April 18 earnings announcement. Annual underlying revenue for the company was down 16% to GBP 1.8 billion (British pounds). Earnings per share (EPS) had also dropped from 10.9 pence (p) in 2006 to -36.3p in FY2007 (fiscal year). Those disappointing numbers were roughly in line with the guidance Stewart had given investors in February. The performance reflected the global decline in music industry revenues, as well as the extraordinary cost of the restructuring program EMI was pursuing to realign its investment priorities and focus its resources to achieve the best returns in the future.

The earnings announcement would include an announcement of the dividend amount, which had not yet been determined. The board would meet soon to review EMI's annual results, and Stewart was to recommend an appropriate final dividend for the fiscal year.<sup>2</sup>

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This case was written by Elizabeth W. Shumadine (MBA '01), under the supervision of Professor Michael J. Schill, based on public information. Funding was provided by the L. White Matthews Fund for Finance case writing. Copyright © 2008 by the University of Virginia Darden School Foundation, Charlottesville, VA. All rights reserved. To order copies, send an e-mail to sales@dardenbusinesspublishing.com. No part of this publication may be reproduced, stored in a retrieval system, used in a spreadsheet, or transmitted in any form or by any means—electronic, mechanical, photocopying, recording, or otherwise—without the permission of the Darden School Foundation. Rev. 2/09.

<sup>1</sup>International Federation of Phonographic Industry (IFPI), "IFPI: 07 Digital Music Report," January 2007.

<sup>2</sup>In the United Kingdom, companies typically declared dividends twice a year, first with the midyear results and second with the full-year results. Typically, EMI paid an interim dividend of 2p per share and a final dividend of 6p per share. In addition, both EMI's interim and final dividends were paid out to shareholders in the following fiscal year. In November 2006, EMI's board committed to paying the interim dividend of 2p per share following its 2007 fiscal midyear results with actual payment to shareholders expected in April 2007. Both the 2p interim dividend and the recommended final dividend would be reflected in the 2008 financial statements.

# Emi Group Plc Case Study Analysis

**Patrick Vollmar**



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