

CISAC

GLOBAL

COLLECTIONS

REPORT **2023**

FOR 2022 DATA



SERVING AUTHORS WORLDWIDE
AU SERVICE DES AUTEURS DANS LE MONDE
AL SERVICIO DE LOS AUTORES EN EL MUNDO



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ABOUT CISAC

The International Confederation of Societies of Authors and Composers (CISAC) brings together 225 collective management organisations in 116 countries/territories and five regions. These collective management organisations represent over five million creators active in five major repertoires: music, audiovisual, visual arts, literature and drama.



116 COUNTRIES/
TERRITORIES



225 COLLECTIVE
MANAGEMENT
ORGANISATIONS



+5M
CREATORS



MUSIC



AUDIOVISUAL



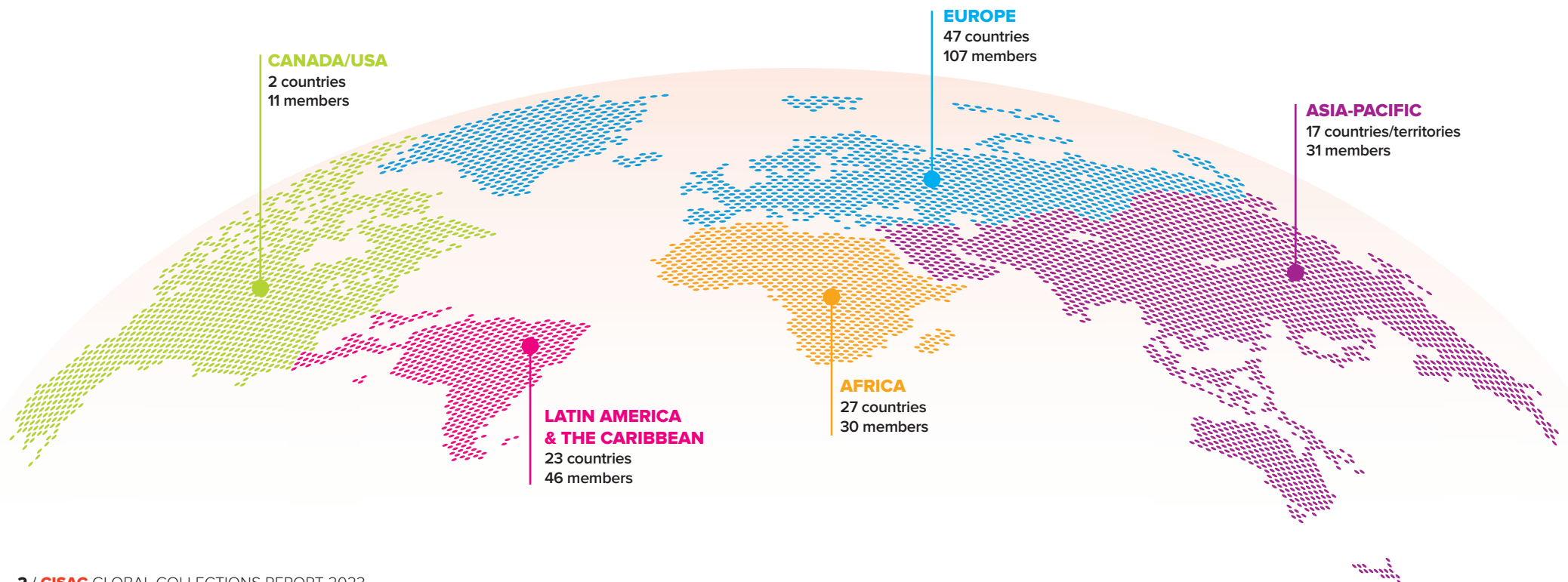
DRAMA



LITERATURE



VISUAL ARTS





Foreword **Björn Ulvaeus**,
President of CISAC

WE MUST ADDRESS AI TO SUSTAIN CREATORS' COLLECTIONS IN THE FUTURE

I'm pleased once again to introduce the CISAC Global Collections Report. It gives a valuable hawk's eye view of how creators worldwide are earning a living from their work.

One big number stands out in this report: EUR4.2bn.

That is the total sum of creators' global royalties that come from digital sources. It's important because, for the first time ever, digital is the biggest source of royalty income. In barely more than a decade, streaming has transformed life for CISAC members and the five million creators it works for.

For all creators, digital is our business. Societies have impressively grown their collections from streaming and subscription after the disaster of COVID. The live business has also surged back. The CISAC network is once again throbbing with concerts, exhibitions and festivals, and the royalties they generate to help creators make a livelihood.

This year's results show that the collective management system, despite all the enormous challenges it faces in adapting to digital, is still robust and effective. CMOs have the backs of the creators they serve and are now delivering more money to more creators than ever before.

And that is good news – because, fresh from COVID and the economic squeeze, what we now face is another very serious, existential challenge – that of Artificial Intelligence.

AI will radically change the world for creators and the creative industry. It demands international leadership and a strong united front from all parts of the creative industry.

As a creator myself and partly through the ABBA Voyage project, I have been fortunate to have been introduced to the use of AI. AI has the potential to empower human creativity in mind-blowing ways. I think of it as having the power to extend the human mind and potentially create wonderful art. But it brings dangers too, and without hard rules protecting human creators, it could also threaten their livelihoods on a huge scale.

CISAC has already taken the initiative on AI. The issue dominated discussions at our General Assembly in May. This was followed by the CISAC-led Open Letter in July, backed by an alliance of groups, and which spelled out seven principles as a key guide to policy makers.

Here are some of the key priorities I propose:

Above all, machines can only be a tool for human creativity, not a replacement of it; use of copyrighted works must be authorised by the creator; copyright must not be weakened or undermined by inappropriate exceptions; use of AI by developers must be transparent; and fair remuneration to the human creator must be fundamental.

AI is an incredibly important issue that needs urgent action. It may not affect the graph lines of creators' collections in 2023, but it will in years ahead. Right now, creators must sit at the table with the tech firms and policy makers at the highest level, starting with the UN, and get their message over.

We must act now to help create great art, and to protect the future of human creativity. ♦



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Foreword **Marcelo Castello Branco**,
Chair of the CISAC Board

WE NEED AN AMBITIOUS ROADMAP FOR THE FUTURE

The Report highlights some incredible positives: a significant growth in collections across the CISAC network, strong distributions from multiple societies, and a remarkable recovery after the unexpected three-year pandemic. At first glance, it may seem like our work as a community is almost complete, with only minor adjustments needed to maintain stable growth. However, the reality is quite the opposite.

Instead of simply celebrating our achievements, now is the time to double down and create an ambitious roadmap for the future. The numbers in this Report demonstrate that our global collective management community is experiencing an extraordinary wave of change.

While it's fantastic that collections have reached record levels, we cannot ignore the growing inequalities and imbalances between different regions, income streams, and large and small societies. We must address these issues head-on, with CISAC leading the way. This means improving systems, resolving data problems, advocating for creators' rights, and maintaining the solidarity of our community.

Although the conversation around AI is all-consuming, I will leave that issue to the insight of Björn and Gadi in this foreword. We are also faced with numerous other challenges that require our attention. We must proactively address the structural changes happening in all repertoires – music, visual arts, audiovisual, drama and literature – where CISAC plays a crucial role.

We must relentlessly work towards resolving the data issues arising from the rapid growth of digital distributions. CISAC remains at the forefront of this work, updating our tools and procedures to provide greater value to our rightsholders. We are also striving to improve our collection and distribution methods while encouraging the adoption of best practices.

At the core of our collective management system lies the voice and influence of creators. It is crucial that their input is always heard and that they are involved in the decision-making process regarding their future. We must listen and learn from the new generation of creators and adapt to their increasingly entrepreneurial spirit and independent ethos.

Our community is incredibly diverse, and although it may sometimes be fragmented by differing viewpoints and intense competition, we view diversity as our strength rather than a weakness. It enhances CISAC's authority as the global voice of creators.

As we gradually move away from the pandemic, our determination to ensure that creators' rights are respected, their works are fairly compensated, and their creative endeavours receive proper credit will remain unwavering. ♦



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Foreword **Gadi Oron**,
Director General

GROWTH THAT SHOWS THE ENDURING STRENGTH OF COLLECTIVE MANAGEMENT

Welcome to CISAC's annual Global Collections Report.



This year's publication shows a remarkable return to growth as our whole sector fully recovers from the disastrous three-year pandemic.

Collections in 2022 were up a record +26.7%. Digital income for the first time became creators' largest income source – a real milestone for our sector. Live and public performance income were almost back to pre-COVID levels. Total collections are now, for the first time, back above pre-pandemic levels by a large margin of 19%.

It can be said without any complacency that these numbers are a reflection of the business skills and resilience of our member societies. They also show the enduring strength of the collective management system, steadily and reliably growing the royalties that sustain creators and the creative economy.

The traditional collective management model is – and has always been – one which puts the creator at the epicentre of its work. Its unique features – power in collective unity; non-profit operations; full transparency; and creator control – are as relevant and as important today as they have ever been.

While all indications show that 2023 will show further growth, there are enormous challenges ahead. The optimism over the return of the live sector, especially the big international tours, is tempered by signs that local events and smaller venues are struggling due to the continuing cost of living crisis.

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Digital income is still under-delivering for the vast majority of creators. Despite the doubling of streaming income in five years, the millions of creators represented by CISAC member societies are still missing out on royalty payments. CISAC societies' collections depend critically on good metadata in the streaming market and our Confederation is at the heart of industry efforts to bring necessary improvements in this area.

We are continuing to extend the use of the ISWC music works identifier throughout the value chain, and supporting members' initiatives to bring together the ISWC and its counterpart recording identifier ISRC, before the release of the song. Success in these endeavours will be a big growth driver for future collections.

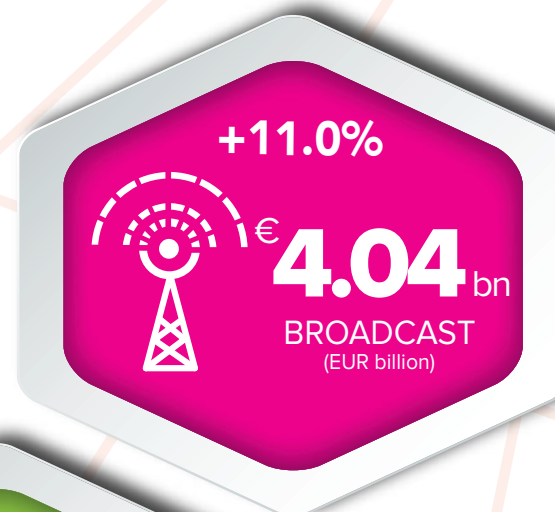
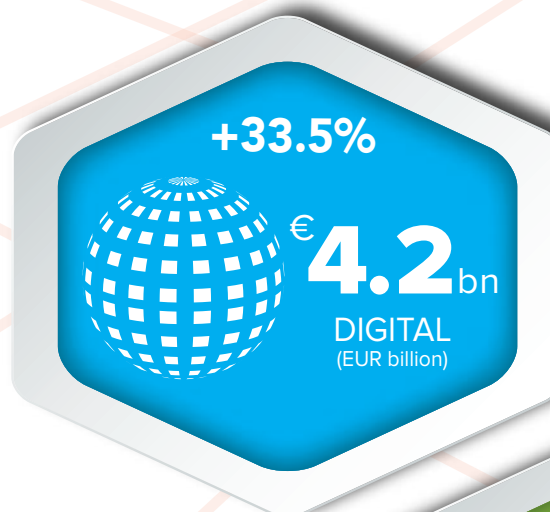
Looking beyond this year, one existential issue overshadows all others: Artificial Intelligence. AI may not affect collections numbers today, but there is no question that the way we address it now will have a huge bearing on collections in the future. Dealing with the threats to the remuneration of human creativity, posed by AI, as well as the amazing opportunities AI tools present, is a top priority for CISAC. We are committed to playing a leading role in the creative industries' efforts to ensure that AI is used to enhance human creativity, not diminish or replace it.

This Report shows a positive picture in collections trends and of the state of the collective management as it adapts to a deeply challenging and rapidly-changing landscape. I hope you will enjoy reading it. ♦

2022 GLOBAL COLLECTIONS



GLOBAL COLLECTIONS
(EUR billion)





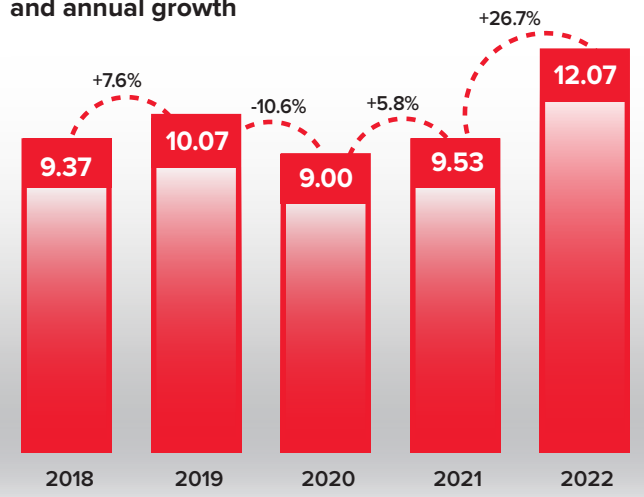
CISAC GLOBAL COLLECTIONS REPORT

HIGHLIGHTS AT A GLANCE

GLOBAL COLLECTIONS ROSE +26.7% TO EUR12.1BN IN 2022

Global collections for creators saw record growth in 2022, rising by more than one-quarter to reach EUR12.1bn.

Global collections (EUR billion) and annual growth



The sharp increase was driven by a strong global recovery in live and public performance after the pandemic, combined with continued robust growth in digital income. Global collections are now at their highest level on record and in 2022 were +19.8% above their pre-pandemic level of 2019.

LIVE AND PUBLIC PERFORMANCE ROYALTIES GROW BY TWO-THIRDS

Royalties from the live and public performance sector, including concerts, background, exhibitions and theatres, increased +69.9% in 2022 as festivals, music tours and businesses reopened.

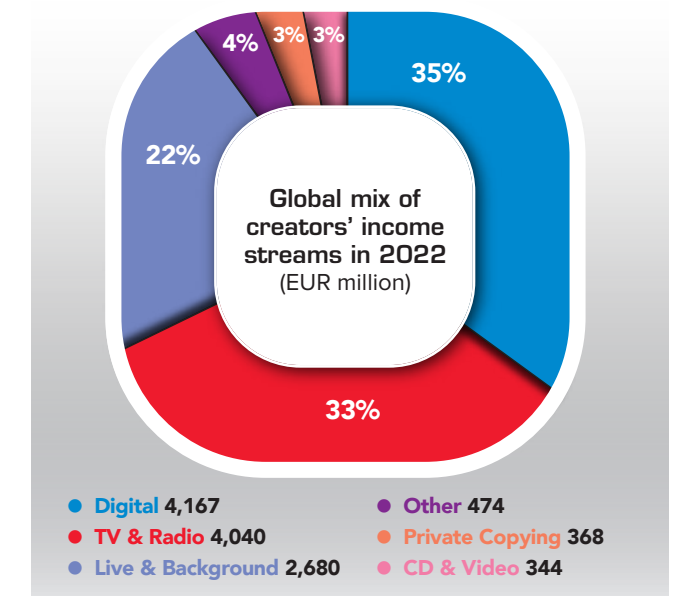
Live and background collections (EUR billion)



Despite this, the sector's return to health fell short of complete recovery, remaining -7.9% below the pre-pandemic level of 2019. The majority of the growth was in Europe, where royalties increased by more than three-quarters of a billion euros, while collections in Latin America more than tripled.

DIGITAL OVERTAKES BROADCAST AS CREATORS' TOP INCOME SOURCE

For the first time, digital became the largest source of revenue for creators, driven by continued growth of subscription streaming and renewed or new licensing deals by societies.

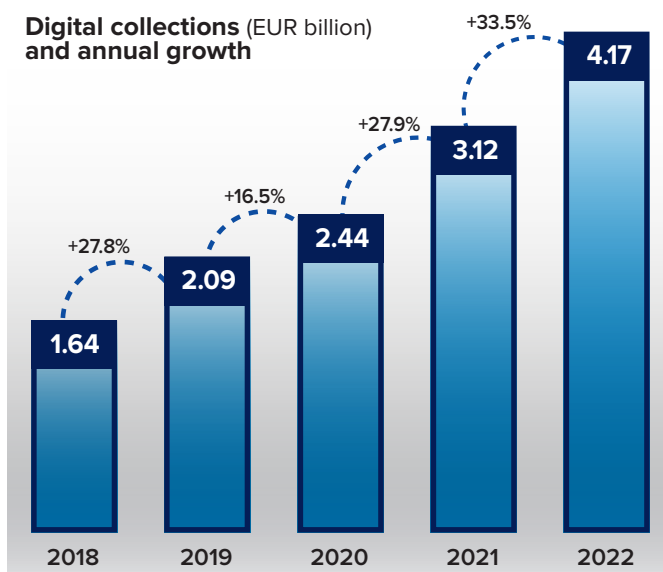


Digital income in 2022 accounted for 35% of all collections, double the share of five years earlier in 2018. Digital's rise comes alongside the continued resilience of TV and radio royalties, up +11% in 2022. Other income streams are led by private copying (EUR368m) and CD and video (EUR344m).

DIGITAL INCOME EXCEEDS EUR4BN AFTER A DECADE OF DOUBLE-DIGIT GROWTH

Collections from the digital use of creators' works increased by +33.5% in 2022 to EUR4.2bn, boosted mainly by continued growth in music streaming and subscription video on demand (SVOD).

Digital collections (EUR billion) and annual growth

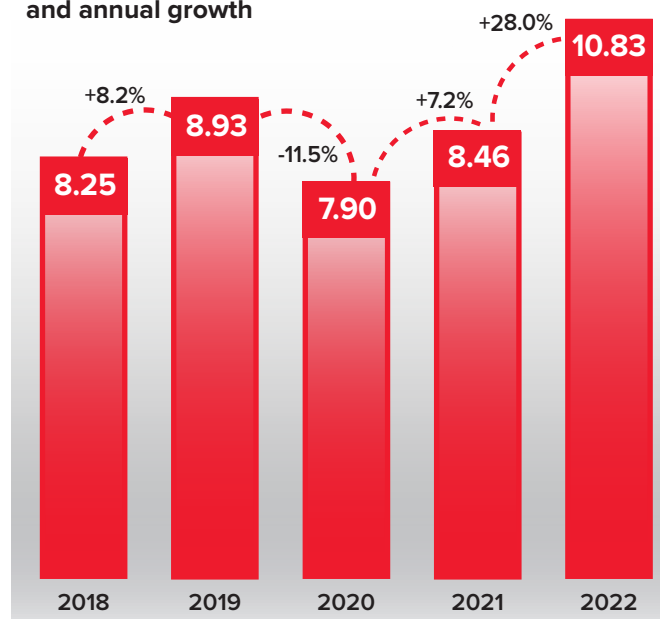


Digital collections were substantially boosted by the pandemic and are now double the pre-pandemic level of 2019. However, in the context of wider creative industries' revenues, digital is still under-performing as an income source for creators. In the music sector, digital comprises 35% of all collections, less than half the corresponding share (71%) in the recording industry.

GLOBAL MUSIC COLLECTIONS RISE +28.0%

Total collections for composers and songwriters increased by +28.0% in 2022 to exceed EUR10bn for the first time. Strong streaming subscription income helped digital collections rise by a record +33.5% to become the largest income stream for music creators.

Music collections (EUR billion) and annual growth



Total music collections growth was also boosted by the resurgence of live concerts: within the "live and background" category, royalties from live concerts rose +185.7% in 2022, according to a sample of more than 100 societies. Collections from TV and radio rose +11.4%.

DIGITAL DRIVES GROWTH IN SMALLER COLLECTING MARKETS

A growing number of territories are seeing a combination of high market shares and continuing strong growth in digital collections, in particular in the Asia-Pacific region. Smaller territories with high digital market shares have seen exponential growth during the three-year pandemic, as streaming consumption and subscription rates rise and new licensing deals are reached.

Leading digital markets by share and 3-year growth rate

Country/Territory	Market share 2022	Growth 2019–2022
INDONESIA	99.5%	+297.7%
VIETNAM	92.1%	+584.7%
THAILAND	83.0%	+269.2%
PHILIPPINES	79.3%	+168.9%
MEXICO	70.4%	+155.9%
TURKEY	67.6%	+80.9%
INDIA	67.1%	+532.7%
HONG KONG	65.9%	+36.4%
TAIWAN, CHINESE TAIPEI	64.9%	+188.2%
SWEDEN	56.2%	+72.1%

ALL THE WORLD'S LARGEST MARKETS SEE GROWTH

All of the world's ten largest collecting territories saw increased growth in 2022 with the average growth rate exceeding +25%.

Top 10 markets: 2022 and growth 2019–2022 (EUR million)

Country/ Territory	Collections	Growth 2022	Growth 2019–2022
UNITED STATES	2,624	+30.5%	+33.3%
FRANCE	1,697	+35.7%	+25.3%
UNITED KINGDOM	1,088	+23.1%	+32.4%
GERMANY	964	+17.0%	+11.0%
JAPAN	849	+3.7% (+10.1%)*	-4.1% (+8.4%*)
ITALY	568	+38.1%	-6.2%
AUSTRALASIA	426	+24.1%	+23.5%
CANADA	338	+25.7%	+31.4%
NETHERLANDS	293	+22.0%	+25.8%
SPAIN	274	+37.4%	+35.4%
TOP 10 TOTAL	9,181		
GLOBAL TOTAL	12,074		

* in local currency

GROWTH IN ALL REPERTOIRES

Drama was the fastest-growing repertoire in 2022, with royalties increasing by +89.4% after being worst affected by lockdown restrictions.

Collections by repertoire, evolution in 2022 (EUR million)

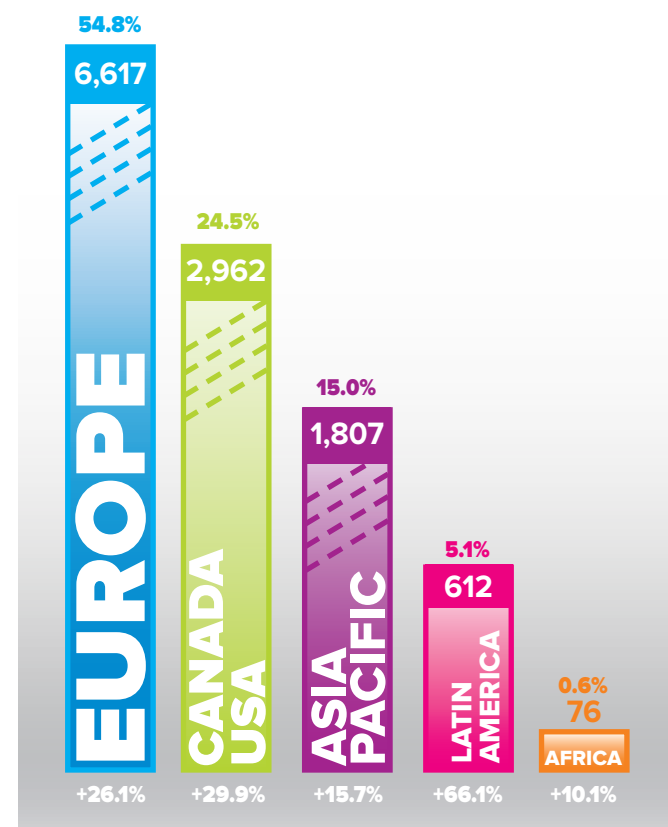
Repertoire	Collections	Growth
Audiovisual	646	+11.0%
Dramatic	169	+89.4%
Literary	207	+5.3%
Music	10,832	+28.0%
Visual Arts	220	+12.8%
GRAND TOTAL	12,074	+26.7%

Despite this, drama was the only repertoire to remain below its 2019 level. Every other sector saw growth. Music consolidated on its earlier 2021 recovery to rise by more than one-quarter.

LATIN AMERICA LEADS GROWTH TABLE AS ALL REGIONS EXPAND

Every region saw growth in 2022 with Europe remaining the largest at more than half the global total. Strong growth in North America slightly narrowed the gap to second place whilst revenues in Latin America increased by +66.1%, helped by the trebling of live and background income. ■

Share and growth of collections by region (EUR million)



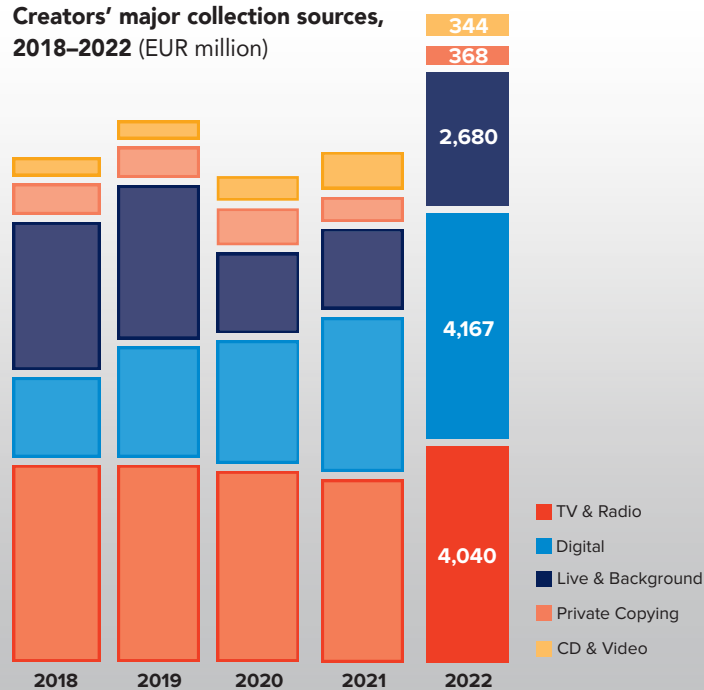


2022 MARKET ANALYSIS

GLOBAL COLLECTIONS UP +26.7% AS CREATORS' INCOME SOURCES CHANGE

Global collections in 2022 surged back with the biggest ever annual increase on record: up +26.7% to EUR12.1bn. The post-COVID recovery highlights big changes in the breakdown of the main income streams of creators. Digital in 2022 became the largest royalty source, while live and public performance remained -7.9% below its pre-COVID peak. Indications are that, after three years of disruption due to COVID, collections growth is returning to the sector's historical pattern of steady, incremental year-on-year progression.

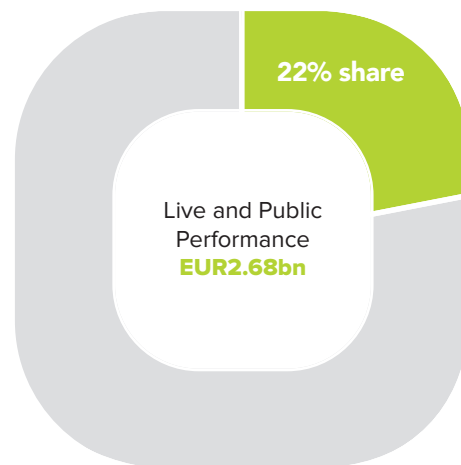
Creators' major collection sources,
2018–2022 (EUR million)



The five-year trend of creators' major royalty streams shows the dramatic reversed fortunes of live and background and digital over the last five years, with digital up +154.3% and live and background down -2.8% since 2018. Broadcast has remained largely flat during the pandemic and the resilience of TV and radio has played a key part in the spectacular return to growth of the whole sector in 2022.

LIVE AND BACKGROUND BOUNCES BACK

Live and public performance collections rose by +69.9% in 2022 and remain -7.9% below 2019. The live sector was the first to collapse from COVID and has been the last to recover. Virtually all societies in 2022 reported sharp increases in all events generating live collections, from concerts and festivals to theatre plays and exhibitions.



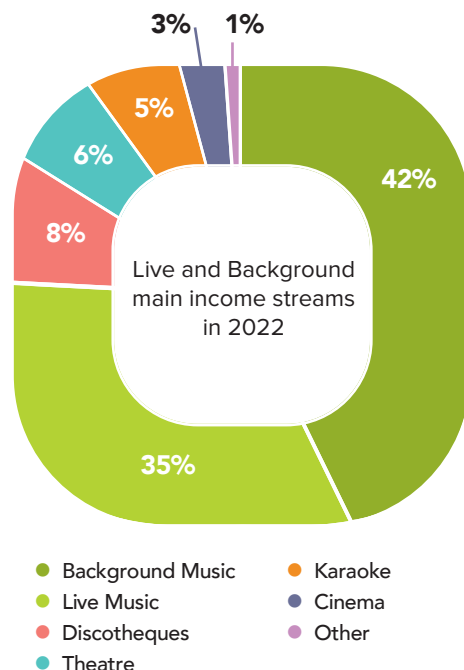
Live music royalties, slower to recover than public performance, bounced back sharply in 2022. Data from a sample of 116 CISAC member societies shows that live music royalties rose +185.7% in 2022, while background music was up only +34%.

The rate of recovery in live and background has also varied by geography. Collections in Latin America and the Caribbean rebounded very strongly in 2022. This region has the highest growth rate of +218.9% but remains -16% short of pre-pandemic levels.

Public performance revenues continued to suffer in some countries from the enduring damage caused by the pandemic. For example, AEI-Guatemala reported that 48% of all bars and restaurants have not reopened after the lifting of COVID restrictions.

Growth of Live & background collections by region

Region	Growth 2022	Growth 2019–2022
AFRICA	+25.9%	-4.3%
ASIA-PACIFIC	+31.1%	-15.4%
CANADA/USA	+41.0%	-1.1%
LATIN AMERICA	+218.9%	-16.0%
E. EUROPE	+56.2%	-19.7%
W. EUROPE	+80.6%	-6.0%
GRAND TOTAL	+69.9%	-7.9%



The royalties creators received from the live and background sector can be broken down into a more diverse range of forms of use and entertainment. The graph, based on a substantial sample of societies, shows the full range of uses categorised as live and background. Background music remains the largest income segment, followed by live music, discotheques and others.

A strong outlook in 2023

In 2023, live entertainment has continued to rebound after three years of pent-up demand. Live and background royalties appear on course for further sharp growth, recovering well beyond pre-pandemic levels for the first time.

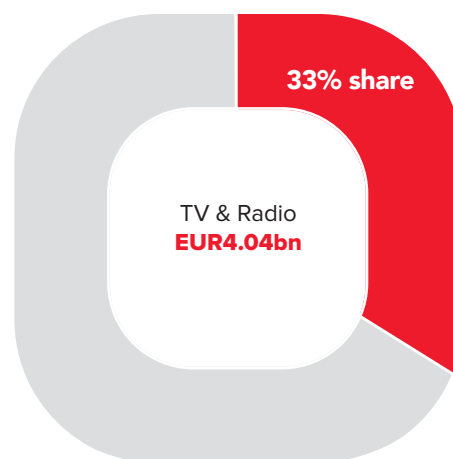
However, there are still some concerns that this bubble will burst after 2023 due to consumer spending cuts and constraints on artists' touring budgets.

Some societies already reported higher collections for the first half of 2023. For example, in Korea, large performances returned after social distancing measures were lifted in April 2022. In the first half of 2023, KOMCA reported that royalties from stage performance were already up +117% over 2022 figures and are projected to be up +227.5% by the end of 2023.

Global events company Live Nation confirmed in May 2023: "Global demand for live events continues to reach new heights — demand has been growing for a long time and is showing no signs of letting up."

TV AND RADIO: ROYALTIES HOLD FIRM

Broadcast collections rose by +11% in 2022 and stand at +4.6% above 2019. TV and radio income was overtaken for the first time by digital.



Over the past decade, shifts in consumption patterns have resulted in a steady audience decline of TV and radio, as people around the world embraced music streaming, SVOD and other means of digital consumption.

TV and radio have seen a declining trajectory overall but have, in general, been quite resilient, while traditional broadcasters have increasingly expanded their offering in the digital space.

TV usage continues to gradually decline as streaming grows. According to Nielsen, cable and TV audiences dropped below 50% for the first time in July 2023. Broadcast accounted for 20% and cable for 29.6% of the audience. Streaming services accounted for a record 38.7% of total US TV usage, with YouTube, Netflix and Hulu attracting the largest audience.

Advertising revenues are a key driver of the trend in broadcast income. These stayed relatively resilient in the pandemic years. Society reports indicated that 2022 broadcast advertising trends overall appeared broadly flat.

In the longer term, advertising revenues are forecasted to grow strongly, driven by the shift of ad spend to digital. PWC's Global Entertainment & Media Outlook projects global advertising revenue at USD806bn in 2023, rising to USD953bn in 2027.



**TV USAGE IS RESILIENT
BUT CONTINUES TO GRADUALLY
DECLINE AS STREAMING
GROWS**



Traditional non-interactive broadcast remains a key sector in many markets, particularly in very large countries with low rates of digital penetration and an enduring dependence on linear broadcasting.

Chasing fair value for creators around the world:

CISAC societies support creators by negotiating and re-negotiating multi-year licence agreements with powerful TV, radio stations and digital service providers. CMOs use the collective strength of creators to fight for fair value for their members. Below are some selected examples:

AEI-Guatemala (Guatemala) achieved a licensing deal with Netflix. The CMO filed a complaint with the Public Ministry against several radio stations for violating copyright. Other complaints are pending with the Public Prosecutor's Office against radio stations and the cable company TIGO.

ACAM (Costa Rica) signed a licensing agreement with broadcast media corporation Canartel.

AKKA-LAA (Latvia) came to agreements with several large digital platforms.

COMPASS (Singapore) settled a decade-long case against a local cable TV operator with the help of 24 CISAC members.

FILSCAP (Philippines) successfully secured public performance licences for election campaign events for major presidential candidates for the first time.

ICSC (China) obtained significant collections growth from statutory licences of textbooks.

LITA (Slovakia) closed a case in 2022, securing collections paid by a cable operator for 2022 as well as back payments.

MACP (Malaysia) increased TV collections by securing two years of licensing fees from subscription broadcaster Astro TV. MACP increased digital collections by onboarding Disney+ Hotstar and obtaining owed royalties from DSPs.

REDES (Colombia), which started distributions only in 2019, has negotiated agreements with a variety of broadcasters, cable operators and other content users. It has now distributed royalties to authors and sister organisations of more than USD1m in royalties over the last four years. In 2022, REDES and DASC signed agreements with national cable operator TIGO-UNE, one of the three largest cable operators in Colombia. This followed an agreement between REDES and the San Andrés Islas local cable operator Sol Cable Vision. These deals helped audiovisual royalties in Colombia to grow +26.1%.

SABAM (Belgium) signed a new licensing agreement with Disney+. A licensing agreement was reached with We Are One World, which organises Tomorrowland, for missing ticketing royalties and to use fingerprinting technology to monitor music played at the festival.

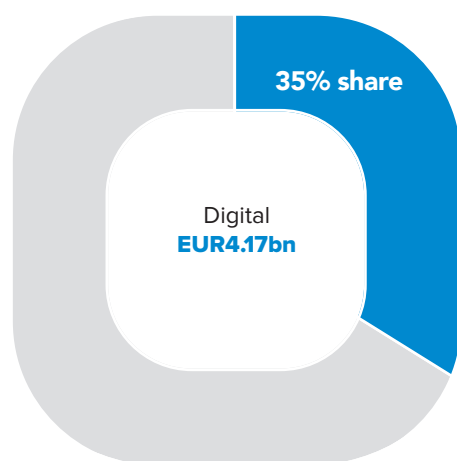
SACVEN (Venezuela) signed agreements with Simple TV (formerly DIRECTV).

SPA (Portugal) signed multi-territorial digital contracts and renewed existing ones.

VCPMC (Vietnam) settled a lawsuit with major streaming website Zing MP3, which accepted to pay past and future royalties. VCPMC is pursuing lawsuits against a large coffee chain for unauthorised public performance use of VCPMC repertoire as well as against several concert promoters to obtain correct licensing royalties.

DIGITAL: NOW CREATORS' LARGEST INCOME SOURCE

In 2022, after years of strong double-digit growth, digital became creators' largest source of global royalty collections for the first time. Digital income rose +33.5% to EUR4.17bn and now accounts for 35% of total collections, doubling since 2019.



This dramatic increase has been driven by societies' licensing activities and organic subscriber growth across all the major streaming subscription services. Spotify reported 220 million premium subscribers in the first half of 2023, up +7% on the corresponding period of 2022.

Digital growth trends have also been influenced by the cost of living and subscription price increases (see analysis by Futuresource, page 14). SVOD appears more vulnerable than music services, with consumers reducing the use of multiple services.

Music streaming is proving to be more robust and will see continued growth in 2023, according to many societies. Growth rates are seen to be generally maturing in developed markets, with fewer new entrants to the market and potentially slower organic growth. New initiatives by platforms aim to boost revenue, such as the crackdown on family plans and account sharing.

Creators' works undervalued despite digital price rises

Price increases are expected to help drive music and video streaming growth. Netflix, Deezer, Disney+, Apple Music, Apple TV+, YouTube and Spotify have announced or implemented price increases – for the first time in over a decade for most of them. For creators, this is one vital step towards unlocking more value for their work and increasing royalties collected by CMOs.

Despite this, creators remain grossly undercompensated by digital services. The 2022 Music Streaming in Germany study, commissioned by GEMA, revealed that authors typically receive EUR0.81 from a standard EUR9.99 music subscription in Germany. Midia Research highlighted that recent DSP price increases are “really only keeping pace with inflation so in real terms, there has been no movement at all”.

Digital income for creators of all genres, at 35% of total global collections, still represents less than half the equivalent digital share (71%) reported for the global recording industry. Several societies highlight that the total increase in digital collections is not translating into more income for many creators.

Music streaming also appears to favour international over local creators in some markets. SOCAN said in its 2022 report that Canadian music creators are not receiving the same visibility in digital when compared to traditional platforms (e.g. radio). Domestic royalty distributions to Canadian SOCAN creators decreased -9% over the past five years. ■

DIGITAL INCOME FOR CREATORS OF ALL GENRES, AT 35% OF TOTAL GLOBAL COLLECTIONS, STILL REPRESENTS LESS THAN HALF THE EQUIVALENT DIGITAL SHARE (71%) REPORTED FOR THE GLOBAL RECORDING INDUSTRY



James Duvall,
Principal Analyst,
Futuresource
Consulting

FROM COVID TO THE COST SQUEEZE – WHAT IS THE OUTLOOK FOR STREAMING COLLECTIONS?

As if the COVID-19 pandemic hadn't had enough impact, regional conflicts and rising inflation continue to apply pressure across the entire entertainment industry. While shoots of recovery are beginning to emerge, global economic growth is still stalling. Subscription services are adopting new strategies to boost margins and future-proof them against the slowdown. These have a direct bearing on future trends in creators' royalties collected by CISAC members.

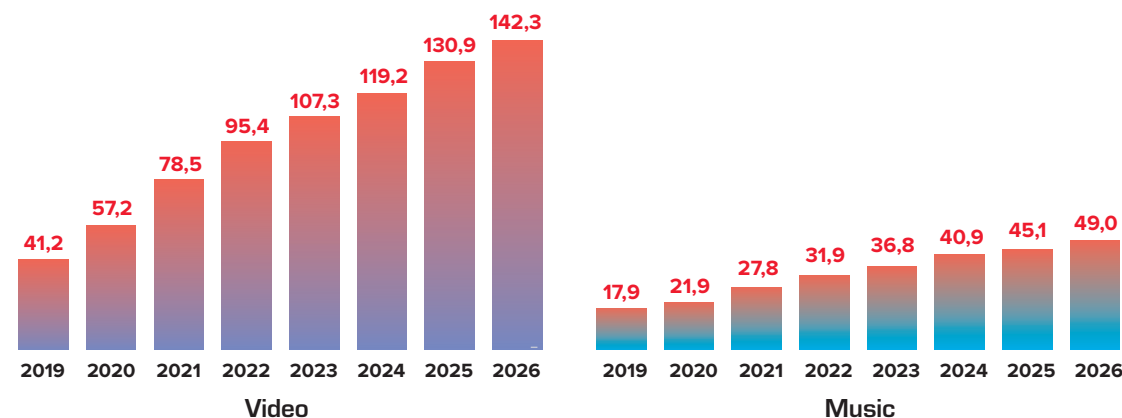
THE POST-PANDEMIC RETURN TO NORMALITY

For streaming services, life has changed radically since the explosive growth witnessed in 2020. Services are now feeling the squeeze from both inflation and the post-COVID recovery. The pre-pandemic lifestyle has gradually become the norm once more, with audiences visiting the cinema more often and attending live shows. Global spend for these activities is expected to surpass US\$30 billion in 2023 – more than 2020 and 2021 combined. As a result, spend across subscription services will take a hit.

SO, HOW HAS THIS IMPACTED VIDEO AND MUSIC STREAMING?

Despite falling short of expectations, both subscription video on demand (SVoD) and music streaming saw double-digit growth in 2022. According to Futuresource, SVoD grew 22% to US\$95.4 billion while music streaming rose 15% year-on-year to US\$31.9 billion. While this was partly caused by services hiking up prices, growth in the number of subscriptions taken out continues to climb, with music subscribers nearly doubling compared to pre-pandemic.

Global Consumer Streaming Spend
(US\$ billion)



SVOD AND MUSIC STREAMING: LOOKING AHEAD

The slowdown in growth for both video streaming and music subscriptions is expected to continue across 2023 and 2024. Global consumer spend on SVoD is estimated to grow by 12% in 2023 and 11% the following year.

For music subscription, growth during the outlook period will drop for the first time to single digits. In the short term, 2023 will see an estimated growth of 15%, and 2024 will see growth of 11%.

CHURN AND AVOD/FAST INFLUENCING VIEWING HABITS

The factors affecting these trends vary across the video and music sectors. For video, one of the key causes of the growth slowdown is consumer churn. Given the economic pressures, consumers are seeking to rebalance their uptake of core services versus those they dip in and out of across the year. We found that one in every five subscribers has cancelled at least one service in the past year, with as many as 40% of these subscribers since re-subscribing.

More developed markets will bear the brunt of this trend, with circa 33% of users in the USA and UK expected to cancel or restart a membership.

Another important factor contributing to this slowdown is the emergence of free ad-supported content by video-on-demand services. This wider content choice has driven a steady increase in audience numbers at the expense of SVoD services.

AD-SUPPORTED VIDEO GROWTH

Over 50% of US survey respondents reported using at least one free ad-supported video-on-demand service in the past month vs. ~40% two years ago. While engagement outside of the States has been slower to get off the ground (in some of the top markets it peaks at around 1/3rd of respondents), this hasn't stopped Roku, Pluto TV and Rakuten TV seeking out partnerships and ramping up the development of original content.

Smart TVs are increasing in footprint, which is bringing ad-supported video content on demand (AVoD) and free ad-supported scheduled content (FAST) channels to a multitude of devices. For example, since 2016 Samsung has pre-loaded AVoD/FAST services on all Samsung TVs and on smartphones operating Android 8.0 or higher. These services are increasing their offerings of both new and library content, resulting in more outlets where creators' content can engage with consumers.

THE RESPONSE? ADAPT TO SURVIVE

Given the challenging economic conditions and subscription slowdown, streaming services are focusing on driving revenues higher. Since 2022, monthly subscription fees have been increasing across the board, one of several strategies in place to reassure shareholders and offset the increasing costs of producing original content.

In the SVoD sector, Netflix and Disney domestically introduced ad-tiers at the end of 2022, simultaneously welcoming a new revenue stream through brand partnerships and offering consumers wider choice. Netflix rolled out its own ad-tiers to a further eleven markets, and Disney's international roll-out is expected at the end of 2023.

THE IMPROVED USER EXPERIENCE

The user journey is another area receiving a sharper focus from subscription services. Netflix has introduced password-sharing guidelines, which produced a mixed bag of results initially. Now, research has shown that 28% of Netflix account holders have paid for additional members outside of the household to have access to their account.

The rise of short-form video has also breached the shores of subscription services. Spotify introduced "discovery" feeds in 2023, while the Samsung TV+ mobile app launched a vertical video experience where the viewer can scroll through short clips of their favourite content.

ORIGINAL CONTENT DEMONSTRATES VALUE

For CMOs considering future streaming royalty trends, there is one big factor to bear in mind: with profit margins closing in on platforms, it is original creative content that is proving to be one of subscription services' most valuable assets. In a key finding from Futuresource's Living with Digital survey, 38% of respondents identified original content as the top reason that draws them to subscribe.

In a time when subscription services are fighting to retain consumers, providing original content could make all the difference.

CORE TAKEAWAYS FOR CREATORS AND CMOs

Given the economic circumstances, the picture could be far bleaker for the sector.

Growth has slowed, but the strategies being adopted by streaming services should help boost profit margins and future-proof the industry. The outlook is strong and by the end of 2026 streaming subscriptions will have surpassed \$140 billion, as services seek to expand and diversify their original content. Alongside the ad-supported services, widening royalty sources will provide creators and CMOs with new opportunities. ■

COLLECTIONS BY REPERTOIRE





MUSIC COLLECTIONS HIT RECORD GROWTH IN 2022

Royalties for songwriters and composers rose +28.0% to a record EUR10.8bn in 2022.

This is the largest rise on record and the first time that music income has exceeded ten billion euros. Collections ended the year +21.4% above 2019, indicating an overall market “reset” after three years of massive disruption by the pandemic. Digital for the first time is the largest music income segment.

The 2022 result came from sustained growth in digital revenues, a post-COVID resurgence of live and public performance income and a resilient broadcast sector.

The growth in live and background and digital added more than EUR1bn for each segment to the 2022 total. TV and radio income remain resilient, rising by +11.4%.

Top 10 collecting countries (EUR million)

Country/Territory	Collections	Growth
UNITED STATES	2,616	+30.5%
FRANCE	1,325	+39.3%
UNITED KINGDOM	1,011	+24.3%
GERMANY	903	+17.9%
JAPAN	848	+3.6%
ITALY	448	+45.6%
AUSTRALASIA	345	+30.6%
CANADA	337	+25.6%
SPAIN	274	+37.4%
KOREA, REPUBLIC OF	247	+22.9%
GRAND TOTAL	8,355	

Music collections by region (EUR billion)

Region	Collections	Growth	Share
EUROPE	5.54	+28.3%	51.1%
CANADA/USA	2.95	+29.9%	27.3%
ASIA-PACIFIC	1.72	+16.5%	15.8%
LATIN AMERICA	0.55	+64.9%	5.1%
AFRICA	0.073	+10.4%	0.7%
GRAND TOTAL	10.83	+28.0%	100.0%

DIGITAL IS NOW THE TOP MUSIC ROYALTIES SOURCE

Music collections from digital grew by +33.5% in 2022 to reach EUR4.1bn. For the first time, digital has overtaken broadcast to become the largest global income stream, taking a 37.7% share of total collections. The trend tracks steady user growth on music streaming platforms and some new and improved licensing deals with services such as Spotify, Netflix and Twitch.

The largest contributor to digital music growth was the USA, with collections up +44.7%. Elsewhere within the top ten collecting countries, France grew by more than +40% while the UK and Germany increased by one-quarter.

Subscription video on demand (SVOD) growth continues, but, by contrast with pure music streaming, is reported to be flattening as some consumers reduce subscriptions under cost of living pressures. PRS for Music in the UK still reported SVOD revenues up +16% to GBP40m, helped by new deals with Amazon and Disney +.

DIGITAL IS NOT REWARDING MUSIC CREATORS

Despite this trend, digital music royalties to creators continue to substantially underperform in the wider context. Even at a record 37.7%, digital’s share of the total market is well below the corresponding share (71%) for the recording industry. GEMA’s report on streaming royalties in 2022, for example, confirmed that only 8% of the subscription income typically goes to music creators.

Digital collection champions (EUR million)

Country/Territory	Digital collections	Total collections	Digital share
MEXICO	111	157	70.4%
INDIA	45	67	67.1%
AUSTRALASIA	223	345	64.5%
SWEDEN	103	167	61.9%
CANADA	180	337	53.4%
UNITED KINGDOM	492	1,011	48.7%
KOREA, REPUBLIC OF	117	247	47.4%
GRAND TOTAL	1,271	2,331	

CONCERTS DRIVE LIVE AND BACKGROUND RECOVERY

Income from live and background sources increased by +68.2% in 2022 but remains -7.7% below the pre-pandemic total. Almost every country saw sharp growth, with France, Italy, UK and Germany each growing collections by over EUR100m. A mass pent-up demand drove a rush of big stadium and international touring acts. In Brazil, for example, a new major festival was launched in São Paulo to run in parallel with the landmark Rock in Rio Festival.

Live music has recovered markedly stronger than public performance. A sample of more than 100 music societies shows live royalties up +185.7% in 2022, compared to a +34% rise in background music.

The sector's recovery has been more limited in smaller countries that lack larger festival revenues. While nearly all twenty-five top collecting countries for live and background saw this sector grow by more than +60% year on year, the bottom twenty-five collecting societies experienced modest deviations.

STRONG GROWTH IN BROADCAST

Royalties from TV and radio maintained the resilience seen during the pandemic, growing +11.4% in 2022. The sector ended the year +4.5% above the 2019 level. TV advertising trends vary in different countries, with some markets seeing declines as a result of weaker economies.

A rise of +20.1% in the USA and +18.9% in France generated more than two-thirds of the increase. India saw outstanding growth (up five-fold) following IPRS's new licensing deal with the broadcaster Zee Entertainment in 2022. In Spain, significant back payments from earlier years supported a +20.8% rise in collections.

Private copying remains a significant music income source for creators, totalling EUR248m, despite a decline of -8.7% in 2022.

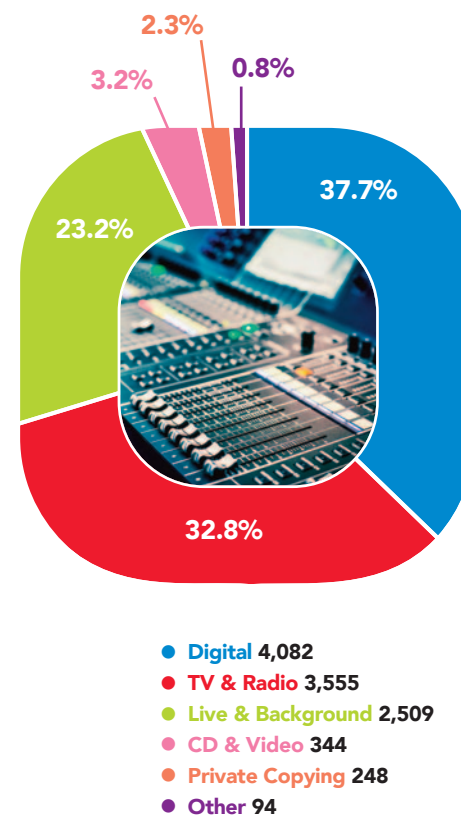
LATIN AMERICA COLLECTIONS UP +64.9%

Latin America and the Caribbean was the region with the sharpest collections growth, up +64.9% after three years of COVID-driven decline. New subscription video negotiations and platform growth helped digital income to rise by +63%. The three largest collecting countries – Brazil, Mexico, and Argentina – saw increases of +57.6%, +71.2% and +85.4% respectively. ■

Breakdown of music collections by type of use (EUR million)

Use category	Collections	Growth 2022	Growth 2019–2022
Digital	4,082	+33.5%	+97.8%
TV & Radio	3,555	+11.4%	+4.5%
Live & Background	2,509	+68.2%	-7.7%
CD & Video	344	-4.1%	-17.8%
Private Copying	248	-8.7%	+13.2%
Other	43	-6.3%	-18.0%
Synchronisation	33	+17.2%	+8.9%
Rental/Public Lending	9	-10.0%	-39.4%
Publication	5	-20.8%	-26.3%
Reprography	4	+9.4%	-
GRAND TOTAL	10,832		

Share of collections by type of use (EUR million)



REPertoire AUDIOVISUAL



AUDIOVISUAL COLLECTIONS REACH ALL-TIME HIGH

Global collections for audiovisual authors increased by +11.0% to reach an all-time high of EUR646m in 2022. Broadcast is substantially the largest source of income, comprising over two-thirds of collections and growing by +8.3% during the year.

Global income from digital sources also grew strongly, rising by +51.8% to reach more than 2.5 times their pre-pandemic level. Despite this increase, the digital sector remains small and accounts for just 10.4% of the total. Live and background uses make up only 3.0% of audiovisual revenue but returned to growth for the second consecutive year.

Top 10 collecting countries (EUR million)

Country	Collections	Growth
FRANCE	265	+14.1%
SWITZERLAND	62	+15.4%
ITALY	49	-5.0%
SPAIN	45	+20.8%
POLAND	33	+8.1%
ARGENTINA	32	+39.6%
GERMANY	20	+14.5%
UNITED KINGDOM	19.2	+19.6%
NETHERLANDS	18.7	-17.2%
AUSTRIA	15	+6.5%
GRAND TOTAL	557	

DIGITAL SUPPORTS GROWTH IN FRANCE

France remains substantially the largest collecting country for the repertoire, generating more than 40% of the total. Collections here grew by +14.1% to exceed a quarter of a billion euros for the first time. The increase was helped by strong growth in digital revenues, which rose by +69.6% during 2022. Broadcast income grew by +7.1% due to strong performance by terrestrial TV channels, with the total exceeding the pre-pandemic level.

French society SACD highlights growth in non-linear and new media services as well as traditional broadcast, plus new negotiated licensing agreements with M6, Prime Video and META.

Switzerland, the second largest collector in the sector, saw income rise by +15.4% to reach EUR62m. Income from private copying added almost EUR5m to this total while broadcast and live revenues also increased steadily. Collections in **Spain** rose by one-fifth, driven by the strong return of cinema attendance, and helped by a back payment from broadcast operators. Collections in **Slovakia** increased by +75.8% to exceed EUR4m for the first time. Back payments from cable TV operators and a doubling in private copying revenue were the primary drivers.

RIGHTS OF REMUNERATION ARE KEY TO COLLECTIONS

Remuneration for audiovisual creators depends on the rights granted in national legislations and in this regard, countries in Europe and Latin America have led the way. Colombia, Chile, Uruguay and Panama have all recently updated their legal frameworks to introduce an unwaivable remuneration right and allow societies to collect for their members. This helps to ensure that screenwriters and directors are fairly rewarded for their work. In 2022, **Slovenia** became the latest country to introduce the unwaivable remuneration right for audiovisual creators.

At the global level, inadequate legal regimes in many countries remain a major barrier for the audiovisual sector. Because of this, royalties account for only 5.4% of total collections by CISAC members.

NEW CONTRACTS BOOST LATIN AMERICAN COLLECTIONS

After Europe, Latin America is the most significant region for audiovisual collections. Growth of +39.2% helped to reverse the decline seen in the previous three years.

The regional total reached EUR43m in 2022 but remained 8.4% below the 2019 figure. The majority of income was generated in **Argentina** where collections grew by +39.6% despite inflation and currency fluctuations. New agreements with cable operators increased broadcast revenue by +29.7% and digital collections registered a +290% increase, while cinemas' recovery from pandemic restrictions drove a five-fold rise in live and background income.

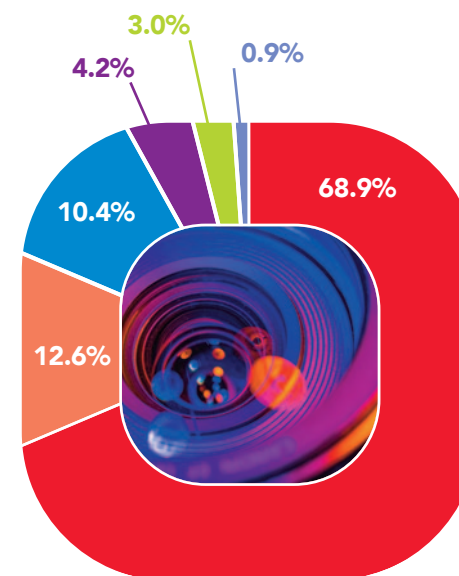
Smaller collecting countries are showing the benefits of a strong legislative landscape. In **Colombia**, new agreements with public and regional TV channels and with one of the continent's largest airlines helped to drive growth of +52.1%. This is the latest landmark in the success story of Colombia's audiovisual societies, REDES and DASC, which started distributing royalties to members in 2018/19. Payments have steadily increased since then, with REDES reporting in 2022 a +92% increase in welfare payments, a ten-fold rise in international collections and a +119% increase in payments to international sister organisations. In four years, the society has given its authors and sister societies more than USD1m.

In **Chile**, where legal challenges to the country's "Ricardo Larraín" audiovisual remuneration law were successfully defeated, collections grew four-fold. In October 2022, Chilean society ATN struck an eight-year royalty rate agreement with free-to-air broadcasters.

Breakdown of audiovisual collections by type of use (EUR million)

Use category	Collections	Growth
TV & Radio	445	+8.3%
Private Copying	82	-0.2%
Digital	67	+51.8%
Other	24.5	+15.1%
Live & Background	20	+33.9%
Educational Use	6	+0.2%
Mechanical Reproduction	1	-61.2%
Rental/Public Lending	0.5	-46.0%
GRAND TOTAL	646	

Share of collections by type of use (EUR million)



- **TV & Radio 445**
- **Private Copying 82**
- **Digital 67**
- **Other 26**
- **Live & Background 20**
- **Educational Use 6**

REPERTOIRE

VISUAL ARTS



VISUAL ARTS COLLECTIONS REACH NEW HIGH

Creators' royalties from the use of visual and graphic arts grew by +12.8% to reach a record EUR220m in 2022. This total is +33.5% above the pre-pandemic level.

Annual collections in this repertoire can be heavily affected by one-off payments. This caused the total income from reprography in 2022 to grow +14.8% following a -29.9% drop the previous year.

Reprography remains the largest royalty income source for visual artists with income obtained from the sale of photocopiers and printers. Revenues from private copying were up +39.2%.

Top 10 collecting countries (EUR million)

Country	Collections	Growth
FRANCE	50	+14.3%
GERMANY	41	+0.8%
UNITED KINGDOM	23	+4.8%
SWEDEN	17	+28.6%
NETHERLANDS	15	+6.4%
AUSTRIA	12	+153.8%
ITALY	11	+13.4%
DENMARK	8.0	-
UNITED STATES	7.8	+12.4%
BELGIUM	7.7	+17.5%
GRAND TOTAL	192	

Visual arts collections by region (EUR million)

Region	Collections	Growth
EUROPE	204	+12.8%
CANADA/USA	8	+15.0%
ASIA-PACIFIC	7	+8.8%
LATIN AMERICA	0.5	+34.0%
AFRICA	0.12	+786.1%
GRAND TOTAL	220	

RESALE RIGHT CONTINUES TO GROW

Collections from the artists resale right increased +7.2% during the year, accounting for EUR50m. This small and crucial royalty is adopted in more than 80 countries and is the second biggest visual arts income source. It is paid to the artist when their work is resold at auctions. It has recovered quickly from lockdown restrictions due to a prompt shift to online auctions. The most significant growth was in the UK and Italy with rises of +7.3% and +25.3% respectively. A study published by UK visual arts society DACS in 2023 found that over two-thirds of resale right payments were less than EUR600 and 75% of artists reinvested the sum in studio costs, material purchases and professional development.

The UK remains the largest collecting country and this right has paid around EUR140m to UK artists and their heirs since its introduction. In May 2023, the UK government confirmed its commitment to the resale right, retaining the right in UK law and excluding it from laws being repealed following the UK's leaving the EU. Mexico introduced a new resale right law in early 2023, making way for payments to visual artist after a 20-year battle by local society SOMAAP.

DIGITAL VISUAL ARTS COLLECTIONS GROW DURING PANDEMIC

Collections from the use of visual artists' work in eBooks, websites or mobile apps have grown more than two and half times since the pre-pandemic level, but still substantially underperform.

Digital collections declined by -2.2% in 2022, mainly due to the large back payment received in Germany the previous year. Correcting for this, the combined total of other countries saw a +27% increase in 2022. Behind Germany, France was the second largest contributor in this group, delivering more than EUR5m in digital collections following an increase of +17.3%.

France sees strong growth

Collections in France grew +14.3% to EUR50m, thanks to the widespread recovery in the cultural sector after the pandemic. ADAGP highlights the increasingly effective application of the right of exhibition which now covers venues supported or financed by the Ministry of Culture. ADAGP doubled collections to more than EUR300k from 130 venues and for more than 170 exhibitions.

REPROGRAPHY INCOME DOUBLES IN SWEDEN

Reprography collections in Sweden near doubled in 2022, driven by revisions to the licensing framework while broadcast income rose by +58.8% albeit from a relatively low base. This combined with strong resale right performance to help total collections rise more than three-quarters above the pre-pandemic level. Reprography also grew notably in China where a statutory license on textbooks allowed local society ICSC to collect more than one million euros for the first time.

DISPUTE RESOLUTION BOOSTS PRIVATE COPYING IN AUSTRIA

Thirteen countries collected revenues from private copying in 2022 with this small levy from the sale of electronic devices growing +39.2% to reach EUR30m. France remained the largest market, but the vast majority of growth was in Austria. Collections had been restricted by a dispute following changes to the 2016 Austrian copyright law, but with this issue resolved, a five-year back payment added more than eight million euros to the 2022 total. ■

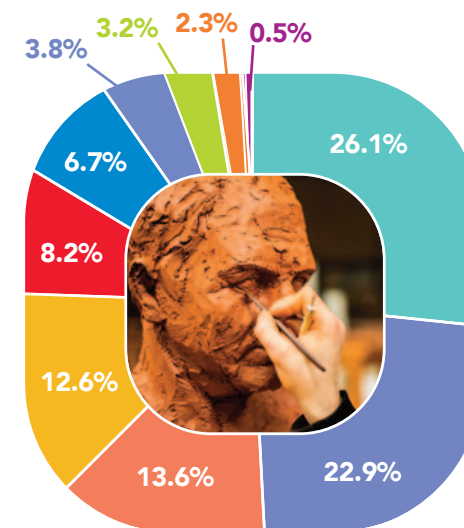
Breakdown of visual arts collections by type of use (EUR million)

Use category	Collections	Growth
Reprography	57	+14.8%
Resale Right	50	+7.2%
Private Copying	30	+39.2%
Reproduction	28	+10.7%
TV & Radio	18	+21.9%
Digital	15	-2.2%
Educational Use	8	-7.4%
Live & Background	7	+2.1%
Rental/Public Lending	5	+18.8%
Other	1	-5.1%
GRAND TOTAL	220	

Resale Right: top 10 collecting countries (EUR million)

Country	Collections	Growth
UNITED KINGDOM	15	+7.3%
FRANCE	13	+6.0%
ITALY	8	+25.3%
GERMANY	4	-23.1%
SWEDEN	2.0	+12.4%
BELGIUM	1.6	+4.4%
CZECH REPUBLIC	1.2	+44.8%
AUSTRIA	1.0	-9.4%
NETHERLANDS	0.9	+29.1%
DENMARK	0.8	-
GRAND TOTAL	47	

Share of collections by type of use (EUR million)



- Reprography 57
- Resale Right 50
- Private Copying 30
- Reproduction 28
- TV & Radio 18
- Digital 15
- Educational Use 8
- Live & Background 7
- Rental/Public Lending 5
- Other 1

REPERTOIRE

DRAMA



DRAMA IS THE FASTEST GROWING REPERTOIRE

Royalties from the use of dramatic works grew faster than any other repertoire in 2022, rising +89.4% to reach EUR169m. With the majority of income derived from public performance, the sector had been decimated by the effects of pandemic lockdowns. The return of theatre audiences rejuvenated the market, with growth in live and background revenues more than doubling during the year.

France is the largest collecting country, with collections up +144.6% in 2022, accounting for one-third of the total. Italy grew by two-fifths, while Argentina increased substantially, even accounting for high inflation.

PRE-COVID INCOME NOT YET REACHED

Despite these increases, the sector total remains almost -10% below the 2019 level. Dramatic revenues in Belgium more than doubled in 2022 following two extremely challenging years. Income is still one-third down on the pre-pandemic level however, with local society SABAM noting 14% fewer recorded events than in 2019. Spain grew at +40.7% and still remained -12.4% below a full recovery. In Latin America, most countries saw exceptional growth as live performance returned. Brazil's and Chile's income from the dramatic repertoire trebled while Colombia's grew eight-fold. Despite this, only Uruguay and Argentina managed to achieve significant increases over their pre-pandemic totals.

BROADCAST INCOME FLATTENS AS LIVE PERFORMANCE RETURNS

Revenues from TV and radio made up 11.1% of dramatic income in 2022. This was down slightly on the previous year as the reopening of stages reversed the increase in TV and radio consumption, especially in smaller collecting countries such as Poland, Latvia and Lithuania. Three-quarters of dramatic broadcast revenue is generated in Italy where the total fell by -5.2%.

PRIVATE COPYING SUPPORTS GROWTH IN SWITZERLAND

A three-fold rise in live collections as stages reopened drove a +74.2% increase in Switzerland, lifting the total +18.6% above the pre-pandemic figure. Broadcast revenues also grew, driven by a +6.8% increase in cable TV. For private copying, authors received a two-year back payment which more than doubled these collections and added EUR2.8m to the country total. ■

Top 5 collecting countries (EUR million)

Country	Collections	Growth
FRANCE	57	+144.6%
ITALY	51	+40.1%
ARGENTINA	17	+409.8%
SWITZERLAND	12	+74.2%
SPAIN	10	+40.7%
GRAND TOTAL	147	

Breakdown of drama collections by type of use (EUR million)

Use category	Collections	Growth
Live & Background	143	+124.8%
TV & Radio	19	-3.7%
Private Copying	5	+15.4%
Other	1.0	+5.8%
Rental/Public Lending	0.3	+67.8%
Digital	0.2	-30.7%
Mechanical Reproduction	0.1	+13.5%
GRAND TOTAL	169	+89.4%

LITERATURE



COLLECTIONS RETURN TO GROWTH

Creators' royalties from literature grew by +5.3% in 2022 to reach EUR207m. This reversed a similar size decrease the previous year and left the total +7% above the pre-pandemic level. Australia remains the largest collecting country but, despite growing by +2.3%, the total remains

more than -10% lower than in 2019. The UK, the next largest collector of literary income, saw an increase of +5.7%. Finland, the Netherlands and Switzerland are the other top five countries, with all but Finland registering growth during the year.

REPROGRAPHY INCOME STABILISES

More than three-quarters of royalties for literature are derived from reprography, the printing of books and magazines. This revenue source is often subject to one-off payments and in the previous two years, the total had swung from a +6.5% rise to a -5.3% drop. In 2022, reprography stabilised to a modest global increase of +2.5%. Growth of +8.9% in Switzerland and +10.6% in the Netherlands following a back payment were offset by a -7.0% drop in Finland, a three-quarter decrease in Italy and an absence of revenue in South Africa.

PUBLIC LENDING REVENUE RISES BY ONE-THIRD

Library lending has seen a big boost following the pandemic. After two relatively flat years, public lending grew by +34.1% in 2022 to make up 13.0% of the literary total. The largest increase was in Italy where a new allocation from the Italian Ministry of Culture drove a five-fold increase in this sector to achieve a record high of EUR5.9m. In the Netherlands, growth of +57.8% led to the highest sector total since 2012. The largest collecting country for literary lending was Finland and despite the total remaining largely flat in 2022, it still made up 44.4% of the market.

E-LENDING FALLS FOLLOWING EXCEPTIONAL GROWTH DURING PANDEMIC

Digital revenues from e-lending fell by -13.1% following a more than three-fold increase during the pandemic years. This revenue is collected in three countries only and increases of +14.7% and +7.4% in the Czech Republic and Latvia were not able to offset a -21.0% decrease in the Netherlands. Private copying revenues also fell by -13.8% with decreases in every country except Latvia and Slovenia. There was growth in the educational use of literature however, with a +7.1% rise driven by strong performance in Korea, by far the largest collecting country for this sector. Live and background use of literature also grew, rising +29.3% as events and businesses reopened. ■

Top 5 collecting countries (EUR million)

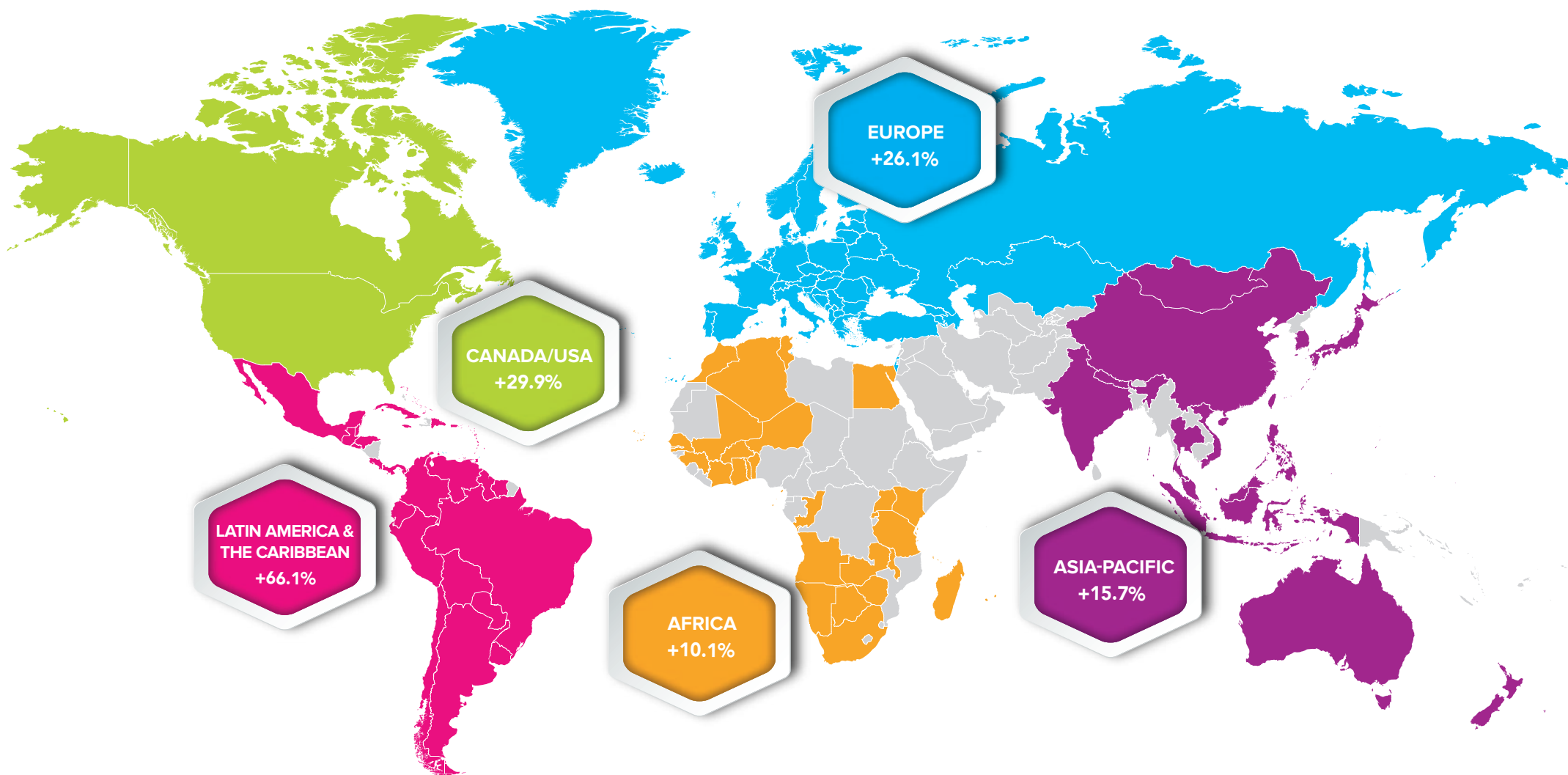
Country	Collections	Growth
AUSTRALIA	78	+2.3%
UNITED KINGDOM	34	+5.7%
NETHERLANDS	20	+15.7%
FINLAND	20	-3.0%
SWITZERLAND	18	+7.9%
GRAND TOTAL	170	

Breakdown of literary collections by type of use (EUR million)

Use category	Collections	Growth
Reprography	161	+2.5%
Rental/Public Lending	27	+34.1%
Educational Use	5	+7.1%
Private Copying	4	-13.8%
TV & Radio	3.3	+0.9%
Digital	2.9	-13.1%
Mechanical Reproduction	1.5	+9.4%
Live & Background	1.4	+29.3%
Other	1.3	-5.6%
GRAND TOTAL	207	+5.3%

COLLECTIONS BY REGION

116 COUNTRIES/TERRITORIES – 225 MEMBERS





EUROPE



RECORD GROWTH AS EUROPE RECOVERS

Collections in Europe saw a record +26.1% growth to reach EUR6.6bn in 2022. The region ended the year +16.2% above the pre-pandemic 2019 level. Europe's royalties total remains above half the world's total at 54.8%.

Growth was mostly generated by a +28.3% rise in music collections. Audiovisual and literary saw single digit increases, while visual arts registered a growth of +12.8%. The dramatic repertoire bounced back dramatically (up +76.5%) after three years under siege from the pandemic.

Three-quarters of the region's growth was generated in the six largest collecting countries. France, Europe's largest market, saw growth of +35.7%, attributed to better deals and rates with broadcast and online users. A group of "middle-sized" markets – Austria, Belgium, the Netherlands, Poland, Portugal and Sweden – grew by more than +20%.

Collections by repertoire, Europe (EUR million)

Repertoire	Collections	Growth
Music	5,539	+28.3%
Audiovisual	601	+9.4%
Visual Arts	204	+12.8%
Dramatic	150	+76.5%
Literary	123	+7.2%
GRAND TOTAL	6,617	+26.1%

Collections by repertoire, Central and Eastern Europe (EUR million)

Repertoire	Collections	Growth
Music	361	+20.1%
Audiovisual	62	+8.0%
Dramatic	14	+72.6%
Literary	7	-1.3%
Visual Arts	4	+8.8%
GRAND TOTAL	449	+18.9%

LIVE AND PUBLIC PERFORMANCE STILL BELOW 2019

The resurgence of the live and background sector is the biggest driver of Europe's recovery, growing +78.5% and adding over three-quarters of a billion euros to the regional total. The recovery was incomplete, however, with income in 2022 still -7.3% below the 2019 figure.

The live concerts and exhibitions sector differed markedly from background/public performance. Based on a comparative sample of more than 30 music societies, live concerts saw an increase of +200.5% while public performance grew just +33.7%.

The recovery was most dramatic in France and Italy, where live and public performance income doubled over 2021. Several countries report that, while large events have returned in force, smaller grassroots live performances have proved slower to

recover. German society GEMA reported 606 large-scale summer concerts (versus 539 in 2019) but more than 380,000 fewer licensed events in total.

Live and background collections in the UK grew by +67.8% to exceed the pre-pandemic level. More than 128,000 live music events were reported to PRS for Music during the year (with collections up +689%) and public performance collections rose by two-thirds. Of the top ten European markets, only Belgium, the Netherlands and Switzerland were able to achieve this same feat and surpass 2019 figures.

DIGITAL MAINTAINS STRONG GROWTH

Digital collections in Europe rose +29.4% driven mostly by subscription streaming. Digital income has increased +96.9% since 2019, while its share of the overall collections is now 28%, compared to 16.5% in 2019.

More than two-fifths of the digital growth in Europe was generated in France, which increased collections by +45.4%. Digital grew by +23.2% in the UK, helped by new agreements with Apple+ and with Amazon for its Freevee service. In Germany, an increase of +24.7% was helped by improved deals with certain platforms. Smaller collecting countries such as Latvia, Poland and Bulgaria also saw high percentage growth.

TV AND RADIO REMAIN LARGEST SOURCE

Broadcast royalties remain robust in Europe, rising by +6.8% to comprise one-third of the total. In France, the sector grew by +14.6% to reach EUR558m.

In the other top five countries, Germany remained flat, and the UK contracted by -1.6%, but this was offset by more than +20% growth in both Italy and Spain. Spanish society SGAE reported growth in all broadcast sectors, with the largest being a +78.6% increase from pay TV.

AUDIOVISUAL REPERTOIRE UP +9.4%

The European audiovisual sector was the second slowest growing repertoire in 2022 despite strong growth in France, Spain and Switzerland. Collections from digital video in France grew by +69.6%.

RECOVERY IN EASTERN EUROPE

Central and Easter Europe grew by +18.9% and collections now exceed pre-pandemic levels by +2.6%. All of the larger markets saw growth, with Poland, the largest, rising by more than a quarter. ■

Digital collections by country (EUR million)

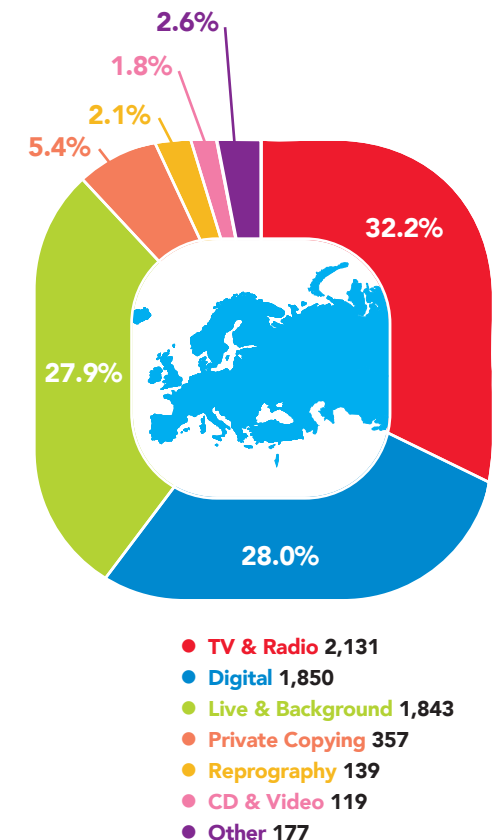
Country	Collections	Share	Growth
FRANCE	570	33.6%	+45.4%
UNITED KINGDOM	492	45.3%	+23.2%
GERMANY	303	31.4%	+24.7%
SWEDEN	103	56.2%	+32.5%
ITALY	65	11.5%	+14.0%
GRAND TOTAL	1,533		

Private copying, Europe's fourth largest revenue stream, is a significant income source for creators in the region. Revenues declined by -3.9% in 2022.

Breakdown of collections by type of use (EUR million)

Use category	Collections	Growth
TV & Radio	2,131	+6.8%
Digital	1,850	+29.4%
Live & Background	1,843	+78.5%
Private Copying	357	-3.9%
Reprography	139	+6.5%
CD & Video	119	-7.7%
Resale Right	49	+6.4%
Other	42	+7.0%
Rental/Public Lending	38	+25.4%
Reproduction	17.3	+13.1%
Synchronisation	16.7	+27.0%
Educational Use	12	+0.9%
Mechanical Reproduction	2	-26.0%
Publication	0.02	-47.0%
GRAND TOTAL	6,617	

Share of collections by type of use (EUR million)





CANADA/USA



DIGITAL POWERS COLLECTIONS TO ONE-THIRD ABOVE PRE-COVID LEVEL

The North American region – incorporating the United States and Canada – has been a major driver of global growth in 2022, with collections overtaking their 2019 total and marking a significant return to normal. All major income channels increased, with digital sustaining the sharp growth rates of the earlier pandemic years.

Total collections in the region were up +29.9% to EUR2.96bn in 2022, which is nearly one-third (33.1%) above the 2019 figures. Digital income is the main driver, with collections of EUR1.2bn, up +41.6% year-on-year, and more than double (up +111.2%) the pre-COVID level of 2019.

Collections by repertoire (EUR million)

Repertoire	Collections	Growth
Music	2,953	+29.9%
Visual Arts	8.5	+15.0%
Audiovisual	0.04	+52.6%
GRAND TOTAL	2,962	+29.9%

Music royalty collections increased by +29.9%, substantially the largest growth rate on record. Music accounts for 99% of the region's collections, with visual arts making up for the rest. Audiovisual collections reported to CISAC are insignificant since the management of residuals in the US goes through the directors' and writers' respective guilds, such as the DGA and WGA.

Visual arts collections reached EUR8.5m, up +15% year-on-year and +17.7% over 2019. The main source of revenue remains reproduction, followed by resale right royalties.

DIGITAL GROWTH ACCELERATES

Digital music consumption in North America surged during the pandemic, and the trend has continued after the end of the lockdowns. The growth is also due to a proactive strategy from collective management organisations in the region to maximise revenues from digital through the licensing of repertoire to a large variety of platforms, from music and video streaming services to SVOD, gaming and livestreaming outlets.

The bulk of collections comes from the three largest PROs in the region reporting to CISAC, which are ASCAP and BMI in the US and SOCAN in Canada (the figures in the report exclude financial data from The MLC and GMR). These societies had record years in both collections and distributions, with only the live sector, synchronisation and physical format failing to return to pre-pandemic levels.



Music collections remain led by TV and radio broadcast (44.0% of the total), but digital income is now a close second (41.6%). Live and background collections recovered sharply with the post-COVID revival of concerts and live entertainment. The income segment is the third largest revenue source and has almost recovered from its 2019 levels, with a +41.0% surge in revenue to EUR378m.

Societies in the region all announced very strong results. In 2022, ASCAP reported that it grew every major category of licensing, in particular general licensing (+40%), radio (+32%), audio streaming (+16%) and audiovisual (+7%). At BMI, which switched to become a for-profit company in December 2022, digital represented the main source of revenue and grew by +35% year-on-year (BMI's fiscal year ends 30 June).

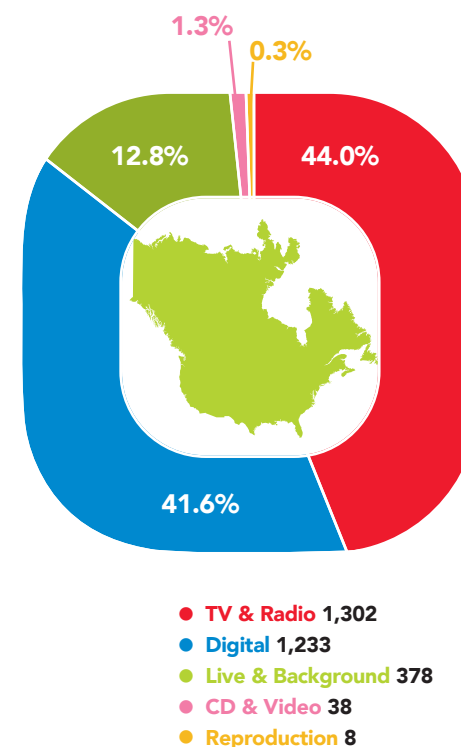
Meanwhile, at SOCAN, the growth engine was digital collections, up +24% year-over-year, nearly surpassing traditional broadcast revenue, while collections from concerts exceeded pre-pandemic levels.

Overall, CISAC members in the region have also benefited from a strong economy in the two countries surveyed, which helped bring live and background as well as radio and TV to pre-pandemic levels while digital revenues continued their upward trajectory both in the US and in Canada. With digital music collections up +41.6% in 2022, digital is on course to becoming the largest source of music revenue in the near future in the region. ■

Breakdown of collections by type of use (EUR million)

Use category	Collections	Growth
TV & Radio	1,302	+18.9%
Digital	1,233	+41.6%
Live & Background	378	+41.0%
CD & Video	38	+7.4%
Reproduction	8	+7.9%
Synchronisation	1	-50.2%
Other	1	+18.7%
Resale Right	0.5	-
Reprography	0.1	+54.3%
GRAND TOTAL	2,962	+29.9%

Share of collections by type of use (EUR million)





ASIA-PACIFIC



DIGITAL GROWTH HELPS POST-COVID RECOVERY

Collections in the Asia-Pacific region grew by +15.7% in 2022 to reach EUR1.8bn. The region's post-COVID recovery has been less dramatic than elsewhere in the world, reflecting the strong digital growth that most local societies achieved during the pandemic period. Collections in 2022 returned to +15.2% above the 2019 level and once again, digital was the primary driver. This sector increased by +25.9% to make up 46.4% of the total.

Live and background income recovered slower than in other regions, growing by +31.1% and remaining -15.4% below the pre-pandemic total. The comeback for TV and radio income, a sector where societies face pressure from powerful broadcasters, was also less marked with a +4.9% increase. Asia-Pacific remains comfortably the world's largest region for physical music revenues despite registering a -4.4% decrease in royalties from CD and video.

Top 3 countries/territories (EUR million)

Country/Territory	Collections	Growth
JAPAN	849	+3.7% (+10.1% JPY)
AUSTRALASIA	426	+24.1%
KOREA, REPUBLIC OF	255	+22.3%
GRAND TOTAL	1,530	

Collections by repertoire (EUR million)

Repertoire	Collections	Growth
Music	1,716	+16.5%
Literary	84	+2.6%
Visual Arts	7	+8.8%
Audiovisual	0.3	+78.6%
GRAND TOTAL	1,807	+15.7%

JAPAN SEES RECORD COLLECTIONS

Collections in Japan increased by +3.7% (+10.1% in JPY) to reach a record high of EUR849m. The main driver was a dramatic rise in live concerts as COVID restrictions abated and venues returned to full capacity. Revenues in this sector were -13.7% (-2.5% in JPY) below the pre-pandemic figure. Background collections also rose, reaching four-fifths of the 2019 total. Radio and TV

performed well with advertising revenue increases from the Tokyo 2020 Olympics extending into calendar year 2022. Digital income also grew with +18.3% and +22.7% increases in music and video streaming on the back of subscriber growth and improved licensing deals with platforms.

AUSTRALASIA BOOSTED BY RETURN OF LARGE MUSIC TOURING

Australasia illustrates the variable trends in the main income streams, partly related to different post-COVID recovery cycles. In Australasia, the biggest driver has been the resurgence of live and background, with live tours from Ed Sheeran, Elton John and others helping generate record live and concert royalties in 2022.

Digital collections in the region grew +45.6%, helped by continued increases in music subscription but slowed by a flattening growth in SVOD brought on by cost-of-living pressures. TV and radio broadcasting remain resilient, staying broadly flat and helped by continued strength in commercial TV advertising.

KOREA SEES STRONG GROWTH IN ALL KEY SECTORS

Collections in Korea ended 2022 more than +50% above the pre-pandemic level following a single year increase of +22.3%. The largest recovery came in live and background where a +59.3% rise was driven by the lifting of social distancing restrictions in the first quarter of the year.

Digital collections rose +15.5% primarily due to streaming growth on international platforms. Broadcast incomes also returned to healthy growth with a +22.6% rise after remaining flat the previous year.

DIGITAL DRIVES INDIAN COLLECTIONS TO DOUBLE

Collections in India near doubled in 2022, concluding a twelve-fold increase in the last five years. A dramatic recovery in TV and radio income was driven by new negotiations with domestic broadcaster Zee Entertainment and provided almost one-third of the country's growth. 2022 was also the first full year since the pandemic without lockdown restrictions, which allowed live and background revenues to treble.

More than half of the growth and two-thirds of all income came from digital sources. YouTube and Spotify lead the market but local streaming services such as Gaana and JioSaavn – both popular sources of domestic film music – also grew.

SMALLER TERRITORIES SEE SHARP GROWTH

Asia-Pacific continues to have an exceptionally strong digital share of total collections. In 2022, the Philippines, Indonesia and Singapore, all countries with strong digital growth, increased by +70.9%, +42.6% and +36.3% respectively. Vietnam led the field, with collections growing nearly four-fold as a result of a sharp recovery in live and background income and a sizeable back payment from YouTube. However, high digital shares also reflect the weakness of other income streams in many Asian markets.

Collections in China rose only by +2.0% in 2022 as strict pandemic policies persisted. Many public-facing businesses performed poorly or ceased trading, while traditional broadcasters began to shut channels leading to a -16.4% fall in TV and radio collections. Digital revenues also fell as the challenges of negotiating licenses with the country's huge distributors continued. Digital revenues also fell due to challenges of licensing large distributors such as Tencent and NetEase. ■

Digital collections by country/territory (EUR million)

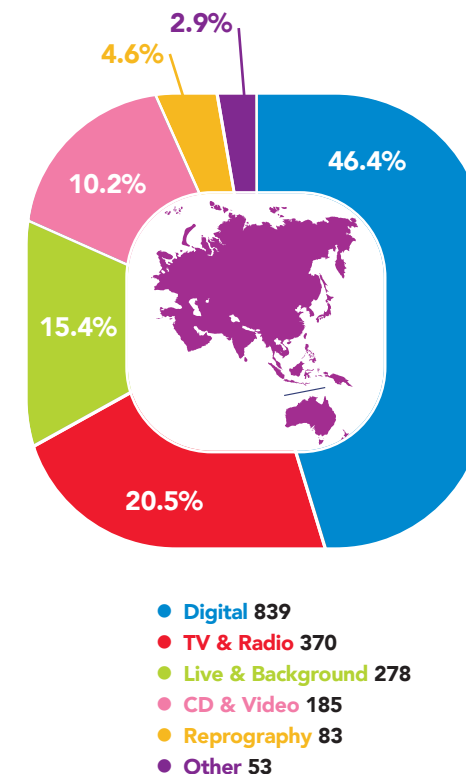
Country/Territory	Digital collections	Total collections	Digital share
JAPAN	324	849	38.2%
AUSTRALASIA	223	426	52.3%
KOREA, REPUBLIC OF	117	255	45.9%
INDIA	45	67	67.1%
HONG KONG	28	43	65.9%
CHINA	24	55	43.1%
VIETNAM	19.2	21	92.1%
TAIWAN, CHINESE TAIPEI	18.5	29	64.9%
INDONESIA	11	11	99.5%
THAILAND	9	11	83.0%
GRAND TOTAL	818.7	1,767	

Breakdown of collections by type of use (EUR million)

Use category	Collections	Growth
Digital	839	+25.9%
TV & Radio	370	+4.9%
Live & Background	278	+31.1%
CD & Video	185	-4.4%
Reprography	83	+3.8%
Other	29	-8.2%
Educational Use	8	+8.0%
Publication	5	-20.7%
Synchronisation	5	-1.7%
Rental/Public Lending	3	-28.7%
Reproduction	2	+1.3%
Resale Right	1	-8.4%
Private Copying	0.02	-41.4%
GRAND TOTAL	1,807	+15.7%



Share of collections by type of use (EUR million)





LATIN AMERICA & THE CARIBBEAN



DIGITAL OVERTAKES TV AND RADIO AS LARGEST INCOME SOURCE

Collections in Latin America rose by +66.1% in 2022 to reach EUR612m, making the region substantially the fastest growing for collections. Growth was more than double that of Canada/USA or Europe, driven by strong increases in the three largest collecting countries. This has reversed a four-year decline caused mainly by the collapse of the live sector due to the pandemic and the higher dependence of Latin America region on live music by comparison with other regions.

Royalties from live and background uses more than trebled (up +218.9%) in 2022. This provided half the regional growth but remains -16% below the pre-pandemic level. TV and radio income increased by +22.3%.

As in previous years, digital collections rose sharply, up by +64.4% to reach EUR232m. This represents a near three-fold increase since 2019 and resulted in digital overtaking broadcast as the region's largest source of income.

Top 3 countries (EUR million)

Country	Collections	Growth
BRAZIL	182	+57.6%
MEXICO	163	+67.3%
ARGENTINA	143	+85.6%
GRAND TOTAL	488	

Collections by repertoire (EUR million)

Repertoire	Collections	Growth
Music	550	+64.9%
Audiovisual	43	+39.2%
Dramatic	18	+382.7%
Visual Arts	0.5	+34.0%
GRAND TOTAL	612	+66.1%

RETURN OF LARGE CONCERTS DOUBLES BRAZILIAN LIVE REVENUE

Brazil remains the largest collecting country, growing by +57.6% in 2022. The largest sector is TV and radio where a recovery in broadcast advertising led to a +34.8% rise. Digital rose sharply by +84.3%. While Spotify and YouTube continue to dominate music streaming, SVOD has seen newer entrants such as Disney+, HBO and Amazon joining Netflix in expanding the country's subscriber base.

The return of large concert tours and festivals was a big boost for Brazil, as a regional hub attracting many international touring acts. Live collections nearly trebled in 2022 as both attendance numbers and ticket prices grew. Live festivals are growing, with the organisers of the biennial Rock in Rio event now scheduling a second parallel festival in São Paulo. The reopening of businesses drove a +58.8% rise in general music licensing and allowed the live and background sector to double during the year.

ARGENTINA GROWTH DEFIES ECONOMIC CHALLENGES

Argentina also saw strong growth, even accounting for a 20-year high in inflation which skews the numbers for all income streams. Total collections were up +126.2% in local currency, estimated at real growth of roughly +40% after inflation. Strong royalty rates for live concerts by comparison with other countries in the region helped grow collections from live and background, which rose more than five-fold during the year. This total still

remains -7.1% below the 2019 level, illustrating the impact of the pandemic.

Broadcast revenues returned to growth in 2022, partly helped by back payments. Digital income doubled during the year to conclude a five-fold rise since 2019. Local music society SADAIC saw a combination of new and improved licensing deals with digital services.



DIGITAL EXTENDS MARKET SHARE LEAD IN MEXICO

Digital has been Mexico's largest income source since 2018 with the sector's resilience helping to maintain creator revenues throughout the pandemic period. In 2022, digital collections grew again, rising +75.9% due to subscription growth at YouTube, Netflix and Spotify, and the settling of a back payment during the year. This further improved digital's market share, which now exceeds 68%.

Broadcast income fell by -4.5% following a significant payment the previous year. Live and background royalties grew more than three-fold as theatres reopened and live events returned. Unlike many other countries in the region, Mexico's relatively smaller reliance on this sector allowed revenues to recover more quickly and the total is now +43.1% above the 2019 figure.

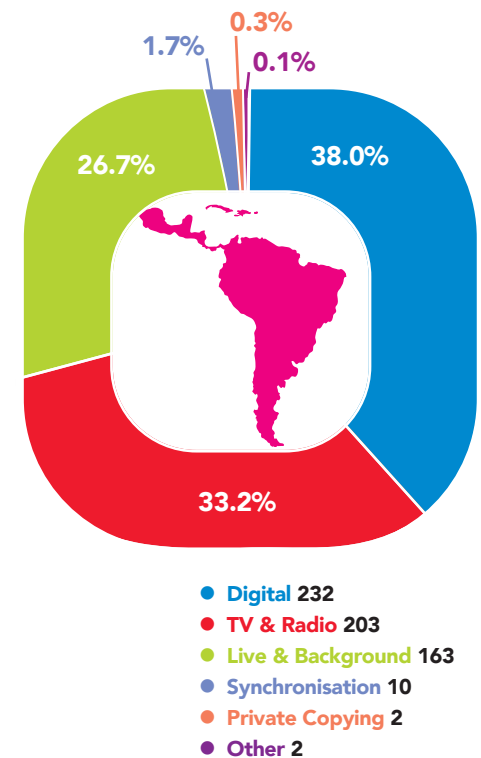
NEW AGREEMENTS DRIVE SUCCESS IN SMALLER COUNTRIES

A number of smaller collecting countries also saw growth as a result of successful negotiations in 2022. In Uruguay, new licensing agreements helped to deliver a doubling of income while in Venezuela, contracts with Simple TV and Intercable more than doubled broadcast revenues and drove a +140.9% growth in total collections. Improved tariffs for bars and restaurants increased creator revenues in El Salvador by +55.9%. In Costa Rica, a new agreement with Netflix, combined with the return of live and background nearly trebled the country's revenue. ■

Breakdown of collections by type of use (EUR million)

Use category	Collections	Growth
Digital	232	+64.4%
TV & Radio	203	+22.3%
Live & Background	163	+218.9%
Synchronisation	10	+36.6%
Private Copying	2	+24.1%
CD & Video	1	+12.6%
Reproduction	0.2	+42.5%
Educational Use	0.2	+27.2%
Other	0.1	+43.3%
Resale Right	0.04	+10.8%
Publication	0.01	-35.0%
Reprography	0.001	-3.5%
GRAND TOTAL	612	+66.1%

Share of collections by type of use (EUR million)





AFRICA



BROADCAST COLLECTIONS RALLY TO DRIVE DOUBLE DIGIT GROWTH IN AFRICA

Creators' collections in Africa grew by +10.1% in 2022, recovering to their pre-pandemic level of EUR76m. TV and radio collections remained the largest sector with 43.8% of the total and were helped by increased income in South Africa from radio advertising revenues and commercial TV.

Broadcast royalty income in the region grew +11.5% to EUR33m, two-thirds of which comes from South Africa. An eight-fold increase in Zimbabwe added almost EUR2.5m to the total. Broadcast revenue in Cameroon also grew, rising almost four-fold due to back payments by users.

LIVE AND BACKGROUND REVENUES GROW DESPITE LOCAL CHALLENGES

Income from live events and the use of music by businesses makes up 22.6% of African collections and grew by more than one-quarter in 2022. The largest contributors to this rise were Angola where revenues leaped five-fold as collections restarted, and Côte d'Ivoire where a +23.2% rise in the live and background sector drove national growth of +2.7%.

Despite this annual growth, the regional total for live and background remains -4.3% below the pre-pandemic level. In South Africa, income grew by +5.5% in 2022 but remained nearly one-fifth down on 2019 with many businesses struggling to recover post-lockdown. Whilst background music grew, local society SAMRO reported cinema and live event revenues falling by -94% and -67% respectively during the year.

Top 3 countries (EUR million)

Country	Collections	Growth
SOUTH AFRICA	40	+6.6%
CÔTE D'IVOIRE	7	+2.7%
MOROCCO	6	-8.0%
GRAND TOTAL	53	

Collections by repertoire (EUR million)

Repertoire	Collections	Growth
Music	73	+10.4%
Audiovisual	1.8	-1.7%
Literary	1	-5.6%
Dramatic	0.3	+2.1%
Visual Arts	0.1	+786.1%
GRAND TOTAL	76	+10.1%

DIGITAL GROWTH SLOWS

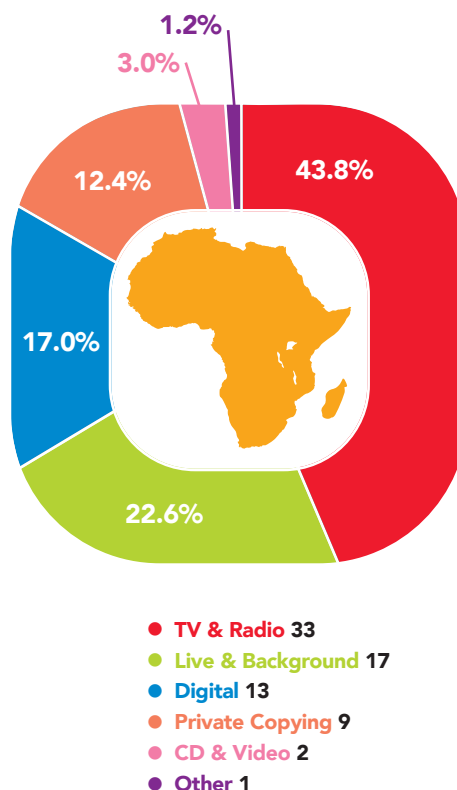
Digital income makes up 17.0% of the regional collections total but grew by just +2.4% in 2022. In South Africa, where 72.4% of these collections are made, a large five-year video on demand (VOD) back payment received the previous year slowed growth in 2022 to +2.1%. Elsewhere, Algeria and Côte d'Ivoire saw real declines in these revenues. The Africa region again has the lowest digital market share of any region.

Private copying was the fourth largest income sector but fell by -11.4% across the eight countries in which it is collected. This was driven by a -17.7% drop in Morocco where more than half of these revenues are collected, and by a three-quarter decrease in Algeria. Burkina Faso however, saw growth with private copying more than doubling and driving a +50.9% increase in the country total.

Breakdown of collections by type of use (EUR million)

Use category	Collections	Growth
TV & Radio	33	+11.5%
Live & Background	17	+25.9%
Digital	13	+2.4%
Private Copying	9	-11.4%
CD & Video	2	+52.2%
Other	1	+16.9%
Reprography	0.14	+21.6%
Rental/Public Lending	0.026	+24.2%
Synchronisation	0.001	-27.3%
GRAND TOTAL	76	+10.1%

Share of collections by type of use (EUR million)



PRIVATE COPYING: WEST AFRICAN GOVERNMENTS BACK NEW DIRECTIVE

Private copying levies in the Africa region currently total EUR9m but have a far greater potential. This income source has now received a boost in with the adoption of a new Regional Directive harmonising rules on private copying and promising increased revenues to creators and the creative industries. CISAC has played a key role advising on this legislation.

A regional directive was unanimously adopted by the eight UEMOA member states on 22nd September 2023.

The International Organisation of La Francophonie (OIF) is also a key partner. CISAC is also engaged on a similar project at Africa regional level with ARIPO.

At present, Burkina Faso and Côte d'Ivoire are the only countries within UEMOA with a functioning private copying remuneration scheme. Private copying collections declared in Burkina Faso by local society BBDA amounted to EUR2.2m and in Côte d'Ivoire, EUR70k.

Once properly implemented, the Directive is expected to have a significant impact. Based on population and GDP per capita, revenue potential by 2025 from private copying remuneration in the countries concerned would range between EUR800k and EUR4m. ■

TABLES OF COLLECTIONS

ALL REPERTOIRES



COLLECTIONS FOR ALL REPERTOIRES IN EUR MILLION

RANK	COUNTRY/TERRITORY	COLLECTIONS	GROWTH	GLOBAL SHARE
1	UNITED STATES	2,624	+30.5%	21.7%
2	FRANCE	1,697	+35.7%	14.1%
3	UNITED KINGDOM	1,088	+23.1%	9.0%
4	GERMANY	964	+17.0%	8.0%
5	JAPAN	849	+3.7%	7.0%
6	ITALY	568	+38.1%	4.7%
7	AUSTRALASIA	426	+24.1%	3.5%
8	CANADA	338	+25.7%	2.8%
9	SPAIN	334	+34.4%	2.8%
10	NETHERLANDS	293	+22.0%	2.4%
11	KOREA, REPUBLIC OF	255	+22.3%	2.1%
12	SWITZERLAND	240	+22.1%	2.0%
13	SWEDEN	183	+25.8%	1.5%
14	BRAZIL	182	+57.6%	1.5%
15	MEXICO	163	+67.3%	1.3%
16	DENMARK	155	+6.4%	1.3%
17	BELGIUM	145	+25.1%	1.2%
18	ARGENTINA	143	+85.6%	1.2%
19	AUSTRIA	126	+36.8%	1.0%
20	POLAND	121	+25.2%	1.0%
21	FINLAND	115	+4.5%	0.9%
22	NORWAY	77	+5.6%	0.6%
23	INDIA	68	+92.5%	0.6%
24	PORTUGAL	63	+39.0%	0.5%
25	ISRAEL	58.5	+32.8%	0.5%

RANK	COUNTRY/TERRITORY	COLLECTIONS	GROWTH	GLOBAL SHARE
26	CZECH REPUBLIC	58.5	+12.4%	0.5%
27	CHINA	55	+2.0%	0.5%
28	RUSSIAN FEDERATION	49	+19.6%	0.4%
29	HONG KONG	43	+29.7%	0.4%
30	HUNGARY	42	+7.6%	0.3%
31	SOUTH AFRICA	40	+6.6%	0.3%
32	ROMANIA	35	+13.9%	0.3%
33	COLOMBIA	34	+56.1%	0.3%
34	CHILE	32	+29.7%	0.3%
35	GREECE	31	+87.8%	0.3%
36	TAIWAN, CHINESE TAIPEI	29	+134.2%	0.2%
37	TURKEY	23	+7.5%	0.2%
38	CROATIA	22	+25.6%	0.2%
39	PERU	20.9	+71.9%	0.2%
40	VIETNAM	20.8	+262.9%	0.2%
41	SLOVENIA	19.1	+18.0%	0.2%
42	IRELAND	18.6	-	0.2%
43	SLOVAKIA	17.1	+28.8%	0.1%
44	MALAYSIA	15.7	+20.6%	0.1%
45	SERBIA	14.2	+4.7%	0.1%
46	URUGUAY	12.3	+111.9%	0.1%
47	THAILAND	11.3	-10.3%	0.1%
48	SINGAPORE	11.0	+36.3%	0.1%
49	INDONESIA	10.8	+42.6%	0.1%
50	PHILIPPINES	9.6	+70.9%	0.1%



TABLES OF COLLECTIONS MUSIC

COLLECTIONS IN EUR MILLION

RANK	COUNTRY/TERRITORY	COLLECTIONS	GROWTH	GLOBAL SHARE
1	UNITED STATES	2,616	+30.5%	24.2%
2	FRANCE	1,325	+39.3%	12.2%
3	UNITED KINGDOM	1,011	+24.3%	9.3%
4	GERMANY	903	+17.9%	8.3%
5	JAPAN	848	+3.6%	7.8%
6	ITALY	448	+45.6%	4.1%
7	AUSTRALASIA	345	+30.6%	3.2%
8	CANADA	337	+25.6%	3.1%
9	SPAIN	274	+37.4%	2.5%
10	KOREA, REPUBLIC OF	247	+22.9%	2.3%
11	NETHERLANDS	240	+28.4%	2.2%
12	BRAZIL	181	+57.6%	1.7%
13	SWEDEN	167	+25.5%	1.5%
14	MEXICO	157	+71.2%	1.5%
15	DENMARK	147.0	+6.7%	1.4%
16	SWITZERLAND	146.9	+23.9%	1.4%
17	BELGIUM	120	+30.0%	1.1%
18	ARGENTINA	94	+85.4%	0.9%
19	AUSTRIA	89	+40.8%	0.8%
20	POLAND	85	+30.5%	0.8%
21	FINLAND	76	+9.2%	0.7%
22	NORWAY	75	+5.2%	0.7%
23	INDIA	68	+92.5%	0.6%
24	CHINA	54.2	+1.3%	0.5%
25	PORTUGAL	53.5	+44.0%	0.5%

RANK	COUNTRY/TERRITORY	COLLECTIONS	GROWTH	GLOBAL SHARE
26	ISRAEL	50	+40.5%	0.5%
27	CZECH REPUBLIC	46.5	+14.2%	0.4%
28	HONG KONG	43	+29.7%	0.4%
29	RUSSIAN FEDERATION	41	+15.9%	0.4%
30	SOUTH AFRICA	40	+6.6%	0.4%
31	HUNGARY	38	+10.3%	0.4%
32	COLOMBIA	32	+56.4%	0.3%
33	CHILE	29.4	+21.7%	0.3%
34	ROMANIA	28.8	+16.9%	0.3%
35	TAIWAN, CHINESE TAIPEI	28.5	+134.2%	0.3%
36	GREECE	24.3	+152.8%	0.2%
37	TURKEY	23.3	+7.5%	0.2%
38	PERU	20.9	+72.0%	0.2%
39	VIETNAM	20.8	+262.9%	0.2%
40	CROATIA	20.1	+27.8%	0.2%
41	IRELAND	18.5	-	0.2%
42	MALAYSIA	15.7	+20.6%	0.1%
43	SERBIA	13.9	+5.3%	0.1%
44	SLOVENIA	13.1	+26.0%	0.1%
45	THAILAND	11.3	-10.3%	0.1%
46	SLOVAKIA	11.3	+20.1%	0.1%
47	SINGAPORE	11.0	+36.3%	0.1%
48	INDONESIA	10.8	+42.6%	0.1%
49	URUGUAY	10.7	+107.3%	0.1%
50	PHILIPPINES	9.6	+70.9%	0.1%



TABLES OF COLLECTIONS AUDIOVISUAL

COLLECTIONS IN EUR MILLION

RANK	COUNTRY/TERRITORY	COLLECTIONS	GROWTH	GLOBAL SHARE
1	FRANCE	265	+14.1%	40.9%
2	SWITZERLAND	62	+15.4%	9.6%
3	ITALY	49	-5.0%	7.6%
4	SPAIN	45	+20.8%	6.9%
5	POLAND	33	+8.1%	5.0%
6	ARGENTINA	32	+39.6%	4.9%
7	GERMANY	20	+14.5%	3.1%
8	UNITED KINGDOM	19	+19.6%	3.0%
9	NETHERLANDS	18.7	-17.2%	2.9%
10	AUSTRIA	14.7	+6.5%	2.3%
11	FINLAND	13.7	-2.5%	2.1%
12	BELGIUM	12.3	-13.7%	1.9%
13	ISRAEL	8.1	-	1.3%
14	CZECH REPUBLIC	7.3	+6.2%	1.1%
15	GREECE	7.1	-	1.1%
16	ROMANIA	6.0	+1.5%	0.9%
17	SLOVENIA	5.4	+3.4%	0.8%
18	MEXICO	5.3	+1.0%	0.8%
19	SLOVAKIA	4.0	+75.8%	0.6%
20	PORTUGAL	3.8	+20.9%	0.6%



TABLES OF COLLECTIONS VISUAL ARTS

COLLECTIONS IN EUR MILLION

RANK	COUNTRY/TERRITORY	COLLECTIONS	GROWTH	GLOBAL SHARE
1	FRANCE	50	+14.3%	22.7%
2	GERMANY	41	+0.8%	18.6%
3	UNITED KINGDOM	23	+4.8%	10.6%
4	SWEDEN	17	+28.6%	7.8%
5	NETHERLANDS	15	+6.4%	6.6%
6	AUSTRIA	12	+153.8%	5.4%
7	ITALY	11	+13.4%	4.9%
8	DENMARK	8.0	-	3.6%
9	UNITED STATES	7.8	+12.4%	3.6%
10	BELGIUM	7.7	+17.5%	3.5%
11	SPAIN	6.0	+9.9%	2.7%
12	FINLAND	5.5	-8.0%	2.5%
13	KOREA, REPUBLIC OF	3.1	+3.0%	1.4%
14	AUSTRALIA	2	-1.5%	1.0%
15	NORWAY	1.9	+22.8%	0.9%
16	CZECH REPUBLIC	1.6	+19.2%	0.7%
17	SWITZERLAND	1.3	+47.9%	0.6%
18	CHINA	1.2	+53.0%	0.5%
19	JAPAN	0.8	+18.6%	0.4%
20	PORTUGAL	0.8	-6.0%	0.4%



TABLES OF COLLECTIONS DRAMA

COLLECTIONS IN EUR MILLION

RANK	COUNTRY/TERRITORY	COLLECTIONS	GROWTH	GLOBAL SHARE
1	FRANCE	57	+144.6%	33.8%
2	ITALY	51	+40.1%	30.2%
3	ARGENTINA	17	+409.8%	10.0%
4	SWITZERLAND	12	+74.2%	7.2%
5	SPAIN	10	+40.7%	5.9%
6	RUSSIAN FEDERATION	8	+44.4%	4.5%
7	POLAND	3.9	+127.9%	2.3%
8	BELGIUM	3.7	+134.2%	2.2%
9	PORTUGAL	1.6	+61.7%	1.0%
10	URUGUAY	1.3	+234.7%	0.8%
11	LITHUANIA	.6	+100.7%	0.4%
12	LUXEMBOURG	.6	+6.2%	0.3%
13	LATVIA	.4	+272.9%	0.3%
14	BELARUS	.4	+70.3%	0.2%
15	SLOVAKIA	.3	+174.1%	0.2%
16	ARMENIA	.2	+79.6%	0.1%
17	KAZAKHSTAN	.2	+214.6%	0.1%
18	CHILE	.2	+234.1%	0.1%
19	BRAZIL	0.1	+193.4%	0.1%
20	ESTONIA	0.1	+42.5%	0.1%



TABLES OF COLLECTIONS LITERATURE

COLLECTIONS IN EUR MILLION

RANK	COUNTRY/TERRITORY	COLLECTIONS	GROWTH	GLOBAL SHARE
1	AUSTRALIA	78	+2.3%	37.8%
2	UNITED KINGDOM	34	+5.7%	16.2%
3	NETHERLANDS	19.9	+15.7%	9.6%
4	FINLAND	19.9	-3.0%	9.6%
5	SWITZERLAND	18.2	+7.9%	8.8%
6	AUSTRIA	9.9	-1.1%	4.8%
7	ITALY	8.8	+50.2%	4.3%
8	KOREA, REPUBLIC OF	5.2	+8.1%	2.5%
9	PORTUGAL	3.5	+5.4%	1.7%
10	CZECH REPUBLIC	3.1	+0.3%	1.5%
11	BELGIUM	1.6	+7.5%	0.8%
12	SLOVAKIA	1.1	-1.8%	0.5%
13	HUNGARY	1.0	-3.3%	0.5%
14	LITHUANIA	0.7	-20.8%	0.3%
15	LATVIA	0.7	+13.4%	0.3%
16	SLOVENIA	0.6	+7.5%	0.3%
17	ISRAEL	0.4	+5.9%	0.2%
18	ALGERIA	0.3	-13.6%	0.1%
19	BURKINA FASO	0.1	+4.0%	0.1%
20	MOROCCO	0.1	+72.5%	0.04%

TABLES OF COLLECTIONS

COLLECTIONS PER CAPITA BY COUNTRY/TERRITORY (EUR)

WORLD AVERAGE: 1.52

RANK	COUNTRY/TERRITORY	COLLECTIONS PER CAPITA	REGION
1	SWITZERLAND	27.40	EUROPE
2	DENMARK	26.27	EUROPE
3	FRANCE	24.97	EUROPE
4	FINLAND	20.62	EUROPE
5	SWEDEN	17.54	EUROPE
6	NETHERLANDS	16.57	EUROPE
7	AUSTRALIA	16.41	ASIA-PACIFIC
8	UNITED KINGDOM	16.24	EUROPE
9	ICELAND	14.25	EUROPE
10	NORWAY	14.05	EUROPE
11	AUSTRIA	13.91	EUROPE
12	BELGIUM	12.45	EUROPE
13	GERMANY	11.46	EUROPE
14	ITALY	9.65	EUROPE
15	LUXEMBOURG	9.17	EUROPE
16	SLOVENIA	9.04	EUROPE
17	CANADA	8.68	CANADA/USA
18	UNITED STATES	7.87	CANADA/USA
19	ESTONIA	7.07	EUROPE
20	SPAIN	7.02	EUROPE
21	NEW CALEDONIA (FRANCE)	6.93	ASIA-PACIFIC
22	JAPAN	6.78	ASIA-PACIFIC
23	ISRAEL	6.12	EUROPE
24	PORTUGAL	6.10	EUROPE
25	HONG KONG	5.84	ASIA-PACIFIC

RANK	COUNTRY/TERRITORY	COLLECTIONS PER CAPITA	REGION
26	ANDORRA	5.73	EUROPE
27	CROATIA	5.68	EUROPE
28	CZECH REPUBLIC	5.55	EUROPE
29	KOREA, REPUBLIC OF	4.94	ASIA-PACIFIC
30	LATVIA	4.43	EUROPE
31	HUNGARY	4.35	EUROPE
32	IRELAND	3.66	EUROPE
33	URUGUAY	3.59	LATIN AMERICA AND THE CARIBBEAN
34	LITHUANIA	3.29	EUROPE
35	POLAND	3.22	EUROPE
36	SLOVAKIA	3.15	EUROPE
37	ARGENTINA	3.09	LATIN AMERICA AND THE CARIBBEAN
38	GREECE	2.99	EUROPE
39	SAINT LUCIA	2.62	LATIN AMERICA AND THE CARIBBEAN
40	MONTENEGRO	2.41	EUROPE
41	SERBIA	2.11	EUROPE
42	SINGAPORE	1.95	ASIA-PACIFIC
43	ROMANIA	1.84	EUROPE
44	CHILE	1.65	LATIN AMERICA AND THE CARIBBEAN
45	BARBADOS	1.46	LATIN AMERICA AND THE CARIBBEAN
46	MEXICO	1.28	LATIN AMERICA AND THE CARIBBEAN
47	BOSNIA AND HERZEGOVINA	1.11	EUROPE
48	BULGARIA	1.08	EUROPE
49	NORTH MACEDONIA	1.00	EUROPE
50	BRAZIL	0.84	LATIN AMERICA AND THE CARIBBEAN

TABLES OF COLLECTIONS

COLLECTIONS AS % OF GDP BY COUNTRY/TERRITORY

WORLD AVERAGE: 0.011%

RANK	COUNTRY/TERRITORY	COLLECTIONS AS % OF GDP	REGION
1	FRANCE	0.064%	EUROPE
2	FINLAND	0.043%	EUROPE
3	DENMARK	0.041%	EUROPE
4	UNITED KINGDOM	0.037%	EUROPE
5	SWEDEN	0.033%	EUROPE
6	CROATIA	0.032%	EUROPE
7	SLOVENIA	0.032%	EUROPE
8	SWITZERLAND	0.031%	EUROPE
9	NETHERLANDS	0.031%	EUROPE
10	ITALY	0.030%	EUROPE
11	AUSTRIA	0.028%	EUROPE
12	AUSTRALIA	0.028%	ASIA-PACIFIC
13	PORTUGAL	0.026%	EUROPE
14	BELGIUM	0.026%	EUROPE
15	ESTONIA	0.026%	EUROPE
16	MONTENEGRO	0.026%	EUROPE
17	SPAIN	0.025%	EUROPE
18	GERMANY	0.025%	EUROPE
19	HUNGARY	0.025%	EUROPE
20	SAINT LUCIA	0.024%	LATIN AMERICA AND THE CARIBBEAN
21	ARGENTINA	0.024%	LATIN AMERICA AND THE CARIBBEAN
22	SERBIA	0.024%	EUROPE
23	LATVIA	0.021%	EUROPE
24	CZECH REPUBLIC	0.021%	EUROPE
25	JAPAN	0.021%	ASIA-PACIFIC

RANK	COUNTRY/TERRITORY	COLLECTIONS AS % OF GDP	REGION
26	ICELAND	0.021%	EUROPE
27	POLAND	0.018%	EUROPE
28	URUGUAY	0.018%	LATIN AMERICA AND THE CARIBBEAN
29	BURKINA FASO	0.017%	AFRICA
30	CANADA	0.017%	CANADA/USA
31	KOREA, REPUBLIC OF	0.016%	ASIA-PACIFIC
32	NORTH MACEDONIA	0.016%	EUROPE
33	SLOVAKIA	0.016%	EUROPE
34	BOSNIA AND HERZEGOVINA	0.015%	EUROPE
35	GREECE	0.015%	EUROPE
36	ANDORRA	0.014%	EUROPE
37	LITHUANIA	0.014%	EUROPE
38	NORWAY	0.014%	EUROPE
39	MALAWI	0.013%	AFRICA
40	HONG KONG	0.013%	ASIA-PACIFIC
41	MEXICO	0.012%	LATIN AMERICA AND THE CARIBBEAN
42	ISRAEL	0.012%	EUROPE
43	CHILE	0.011%	LATIN AMERICA AND THE CARIBBEAN
44	UNITED STATES	0.011%	CANADA/USA
45	ZIMBABWE	0.011%	AFRICA
46	ROMANIA	0.010%	EUROPE
47	COLOMBIA	0.010%	LATIN AMERICA AND THE CARIBBEAN
48	SOUTH AFRICA	0.010%	AFRICA
49	COTE D'IVOIRE	0.010%	AFRICA
50	BRAZIL	0.010%	LATIN AMERICA AND THE CARIBBEAN

MEMBERSHIP BY REGION

116 COUNTRIES/TERRITORIES - 225 MEMBERS

Note on categories of membership: CISAC full members classify as Collective Management Organisations and are required to meet CISAC's professional rules and resolutions. Provisional members are on a two-year probationary period prior to full membership. In addition, CISAC accepts Clients, which are entities that are not members but manage rights on behalf of rightsholders.



EUROPE

47 countries
107 members

SOCIETY	STATUS	REPERTOIRE	COUNTRY/TERRITORY
AAS	P	M, AV, D, AGP	AZERBAIJAN
ACS	M	AGP	UNITED KINGDOM
ACUM	M	M, L	ISRAEL
ADAGP	M	AGP	FRANCE
AIPA	P	AV	SLOVENIA
AKKA-LAA	M	M, AV, D, L, AGP	LATVIA
AKM	M	M	AUSTRIA
ALBAUTOR	P	M, AV	ALBANIA
ALCS	M	AV, L, AGP	UNITED KINGDOM
AMUS	M	M	BOSNIA AND HERZEGOVINA
ANCO	P	M	MOLDOVA, REPUBLIC OF
ARMAUTHOR NGO	M	D, M	ARMENIA
ARTISJUS	M	M, L	HUNGARY
ATHINA-SADA	P	AV	GREECE
AUTODIA	M	M	GREECE
AVTE	P	AV	FRANCE
AZDG	P	AV	AZERBAIJAN
BILDRECHT	M	AGP	AUSTRIA
BILDUPPHOVSRÄTT	M	AGP	SWEDEN
BONO	M	AGP	NORWAY
BUMA	M	M	NETHERLANDS
COPYSWEDE	P	AV	SWEDEN
CRSEA	A	NR	RUSSIAN FEDERATION
DACIN SARA	P	AV	ROMANIA
DACS	M	AGP	UNITED KINGDOM
DAMA	M	AV	SPAIN
DHFR	M	AV	CROATIA
DILIA	M	AV, L	CZECH REPUBLIC
DIRECTORS UK	M	AV	UNITED KINGDOM
EAD	M	M, AV, D, AGP	ESTONIA
EDEM	P	M	GREECE
EKKI	P	M	SPAIN
EVA	A	AGP	BELGIUM
FILMAUTOR	M	AV	BULGARIA
FILMJUS	M	AV	HUNGARY
GCA	M	M, D, L	GEORGIA

SOCIETY	STATUS	REPERTOIRE	COUNTRY/TERRITORY
GEMA	M	M	GERMANY
GESAC	A	NR	BELGIUM
GESTOR	M	AGP	CZECH REPUBLIC
HDS-ZAMP	M	M	CROATIA
HUNGART	M	AGP	HUNGARY
IMPF	A	M	BELGIUM
IMRO	M	M	IRELAND
ISOCRATIS	P	AV	GREECE
IVARO	P	AGP	IRELAND
KAZAK	P	M, D, L	KAZAKHSTAN
KODA	M	M	DENMARK
KOPIOSTO	M	AV, L, AGP	FINLAND
KUVASTO	M	AGP	FINLAND
LATGA	M	M, AV, D, L, AGP	LITHUANIA
LIRA	M	L, AV	NETHERLANDS
LITA	M	AV, D, L, AGP	SLOVAKIA
LITERAR-MECHANA	M	L, AV	AUSTRIA
MESAM	M	M	TURKEY
MSG	M	M	TURKEY
MUSICAUTOR	M	M	BULGARIA
MYNDSTEF	P	AGP	ICELAND
NCB	M	M	DENMARK
NCIP	P	M, D	BELARUS
NGO-UACRR	P	M, D	UKRAINE
OAZA	M	AV	CZECH REPUBLIC
OFA	P	AGP	SERBIA
OOA-S	M	AV, AGP	CZECH REPUBLIC
OSA	M	M	CZECH REPUBLIC
PAM CG	M	M	MONTENEGRO
PICTORIGHT	M	AGP	NETHERLANDS
PROLITTERIS	M	L, AGP	SWITZERLAND
PRS FOR MUSIC	M	M	UNITED KINGDOM
RAO	M	M, D, AGP	RUSSIAN FEDERATION
SAA	P	AV	BELGIUM
SABAM	A	M, AV, D, L, AGP	BELGIUM
SACD	M	AV, D	FRANCE

SOCIETY	STATUS	REPERTOIRE	COUNTRY/TERRITORY
SACEM	M	M	FRANCE
SACEMLUXEMBOURG	M	M	LUXEMBOURG
SAIF	M	AGP	FRANCE
SANASTO	M	L	FINLAND
SAZAS	M	M	SLOVENIA
SCAM	M	AV, L	FRANCE
SDADV	P	AV, M	ANDORRA
SEDA	P	M	SPAIN
SGAE	M	M, AV, D	SPAIN
SIAE	M	M, AV, D, L, AGP	ITALY
SIIP	P	M, AV, D, L, AGP	UZBEKISTAN
SOFAM	M	AGP	BELGIUM
SOKOJ	M	M	SERBIA
SOZA	M	M	SLOVAKIA
SPA	M	M, AV, D, L, AGP	PORTUGAL
SSA	M	AV, D	SWITZERLAND
STEF	M	M	ICELAND
STEMRA	M	M	NETHERLANDS
STIM	M	M	SWEDEN
SUISA	M	M	SWITZERLAND
SUISSIMAGE	M	AV	SWITZERLAND
TALI	M	AV	ISRAEL
TEOSTO	M	M	FINLAND
TONO	M	M	NORWAY
UCMR-ADA	M	M	ROMANIA
UFFICIO GIURIDICO	A	NR	VATICAN CITY STATE
VDFS	M	AV	AUSTRIA
VEGAP	M	AGP	SPAIN
VEVAM	M	AV	NETHERLANDS
VG BILD-KUNST	M	AGP, AV	GERMANY
VISDA	M	AGP	DENMARK
ZAIS	M	M, D	POLAND
ZAMP MACEDONIA	M	M	NORTH MACEDONIA
ZAMP SLOVENIA	M	L	SLOVENIA
ZAPA	M	AV	POLAND



CANADA/USA

2 countries
11 members

SOCIETY	STATUS	REPERTOIRE	COUNTRY/TERRITORY
AMRA	M	M	UNITED STATES
ARS	M	AGP	UNITED STATES
ASCAP	M	M	UNITED STATES
ASCRL	P	AGP	UNITED STATES
CARCC	M	AGP	CANADA
CSCS	M	AV	CANADA

SOCIETY	STATUS	REPERTOIRE	COUNTRY/TERRITORY
DGA	A	AV	UNITED STATES
DRCC	M	AV	CANADA
SARTEC	A	AV	CANADA
SOCAN	M	M, AGP	CANADA
SPACQ	A	M	CANADA

Provisionals upgraded to Members

JASPAR (Japan), KOLAA (Korea, Republic Of), SCM Cooperativa (Cabo Verde)

Members reclassified to Provisionals

BBDA (Burkina Faso), COSOMA (Malawi), NCIP (Belarus), SACIM (El Salvador)

Former CISAC members now CISAC Client RMEs:

BMI (United States)

STATUS WITHIN CISAC

M = Member
A = Associate
P = Provisional

REPERTOIRE

M = Music

AV = Audiovisual

AGP = Visual Arts

L = Literature

D = Drama

NR = No Repertoire

MEMBERSHIP BY REGION

116 COUNTRIES/TERRITORIES - 225 MEMBERS



ASIA-PACIFIC

17 countries/territories
31 members

SOCIETY	STATUS	REPERTOIRE	COUNTRY/TERRITORY
AMCOS	M	M	AUSTRALASIA
APG-JAPAN	A	AGP	JAPAN
APRA	M	M	AUSTRALASIA
ASDACS	M	AV	AUSTRALIA
AWGACS	M	AV	AUSTRALIA
CASH	M	M	HONG KONG
COMPASS	M	M	SINGAPORE
COPYRIGHT AGENCY	M	L, AGP	AUSTRALIA
CPSN	A	M	NEPAL
DEGNZ	A	AV	NEW ZEALAND



LATIN AMERICA & THE CARIBBEAN

23 countries
46 members

SOCIETY	STATUS	REPERTOIRE	COUNTRY/TERRITORY
AACIMH	M	M	HONDURAS
ABRAMUS	M	M, D	BRAZIL
ACAM	M	M	COSTA RICA
ACCS	A	M	TRINIDAD AND TOBAGO
ACDAM	M	M	CUBA
ADDAF	M	M	BRAZIL
AEI-GUATEMALA	M	M	GUATEMALA
AGADU	M	M, AV, D, AGP	URUGUAY
AMAR SOMBRÁS	M	M	BRAZIL
APA	M	M	PARAGUAY
APDAYC	M	M, D	PERU
APSAV	P	AGP	PERU
ARGENTORES	M	AV, D	ARGENTINA
ARTEGESTION	P	AGP	ECUADOR
ASSIM	M	M	BRAZIL
ATN	M	AV, D	CHILE



AFRICA

27 countries
30 members

SOCIETY	STATUS	REPERTOIRE	COUNTRY/TERRITORY
BBDA	P	M, AV, D, L, AGP	BURKINA FASO
BCDA	P	M, AV, D, L	CONGO
BGDA	P	M, AV, D, L, AGP	GUINEA
BMDA	M	M, D, L	MOROCCO
BUBEDRA	P	M, AV, D, L, AGP	BENIN
BUMDA	P	M, AV, D, L, AGP	MALI
BURIDA	M	M, AV, D, L, AGP	CÔTE D'IVOIRE
BUTODRA	P	M, AV, D, L, AGP	TOGO
CAPASSO	M	M	SOUTH AFRICA
COSBOTS	P	M, AV, D, L	BOTSWANA

SOCIETY	STATUS	REPERTOIRE	COUNTRY/TERRITORY
DGJ	A	AV	JAPAN
DGK	P	AV	KOREA, REPUBLIC OF
FILSCAP	M	M	PHILIPPINES
ICSC	P	AGP	CHINA
IPRS	M	M	INDIA
JASPAR	M	AGP	JAPAN
JASRAC	M	M	JAPAN
KOLAA	M	L, AGP	KOREA, REPUBLIC OF
KOMCA	M	M	KOREA, REPUBLIC OF
KOSCAP	P	M	KOREA, REPUBLIC OF

SOCIETY	STATUS	REPERTOIRE	COUNTRY/TERRITORY
AUTVIS	M	AGP	BRAZIL
BSCAP	P	M	BELIZE
COSCAP	M	M	BARBADOS
COTT	M	M	TRINIDAD AND TOBAGO
CREAIMAGEN	P	AGP	CHILE
DAC	M	AV	ARGENTINA
DASC	M	AV	COLOMBIA
DBCA	P	AV	BRAZIL
DIRECTORES	M	AV	MEXICO
ECCO	P	M	SAINT LUCIA
GEDAR	P	AV	BRAZIL
JACAP	M	M	JAMAICA
REDES	M	AV	COLOMBIA
SACIM, EGC	P	M	EL SALVADOR
SACM	M	M	MEXICO
SACVEN	P	M, D	VENEZUELA

SOCIETY	STATUS	REPERTOIRE	COUNTRY/TERRITORY
COSOMA	P	M, L	MALAWI
COSOTA	P	M	TANZANIA, UNITED REPUBLIC OF
COSOZA	P	M	TANZANIA, UNITED REPUBLIC OF
GHAMRO	P	M	GHANA
MASA	P	M	MAURITIUS
MALI MALIKI INSTITUTE	A	M, AV, D, L, AGP	GHANA
MCSK	P	M	KENYA
NASCAM	M	M	NAMIBIA
OMDA	P	M, AV, D, L	MADAGASCAR
ONDA	M	M, AV, D, L	ALGERIA

SOCIETY	STATUS	REPERTOIRE	COUNTRY/TERRITORY
MACA	M	M	MACAU
MACP	M	M	MALAYSIA
MCSC	M	M	CHINA
MCT	M	M	THAILAND
MOSCAP	P	M, AV	MONGOLIA
MRCNS	P	M	NEPAL
MUST	M	M	TAIWAN, CHINESE TAIPEI
SACENC	M	M	NEW CALEDONIA (FRANCE)
SACK	M	AGP	KOREA, REPUBLIC OF
VCPMC	M	M	VIETNAM
WAMI	M	M	INDONESIA

SOCIETY	STATUS	REPERTOIRE	COUNTRY/TERRITORY
SADALC	M	M	ARGENTINA
SAVA	P	AGP	ARGENTINA
SAYCE	M	M	ECUADOR
SAYCO	M	M, D	COLOMBIA
SBACEM	M	M	BRAZIL
SCD	M	M	CHILE
SGACEDOM	M	M	DOMINICAN REPUBLIC
SICAM	M	M	BRAZIL
SOBODAYCOM	M	M	BOLIVIA
SOCINPRO	M	M	BRAZIL
SOSEM	P	AV, D, L	MEXICO
SOMAAP	M	AGP	MEXICO
SPAC	M	M	PANAMA
UBC	M	M	BRAZIL

SOCIETY	STATUS	REPERTOIRE	COUNTRY/TERRITORY
OTDAV	P	M, D, L	TUNISIA
RSAU	P	M	RWANDA
SACERAU	P	M, AV	EGYPT
SAMRO	M	M	SOUTH AFRICA
SCM-COOPERATIVA	M	M	CABO VERDE
SODAV	P	M, AV, D, L, AGP	SENEGAL
UNAC-SA	P	M	ANGOLA
UPRS	P	M	UGANDA
ZAMCOPS	P	M	ZAMBIA
ZIMURA	M	M	ZIMBABWE

STATUS WITHIN CISAC

M = Member
A = Associate
P = Provisional

New CISAC members as of June 2023:

SOCIETY	STATUS	REPERTOIRE	COUNTRY/TERRITORY	REGION
AVTE	A	AV	FRANCE	EUROPE
DGJ	A	AV	JAPAN	ASIA PACIFIC
MALI MALIKI INSTITUTE	A	M, AV, D, L, AGP	GHANA	AFRICA
SEDA	P	M	SPAIN	EUROPE
SIIP	P	M, AV, D, L, AGP	UZBEKISTAN	EUROPE

Societies no longer CISAC members as of
June 2023:

ABYROY (Kazakhstan, M), AUPO CINEMA (Ukraine, AV),
CMC (Cameroon, M), SACS (Seychelles, M),
SASUR (Suriname, M), SOCILADRA (Cameroon, D, L)

CISAC Client RMEs:

ALLTrack (United States, M), BMI (United States, M), CMRRA (Canada, M),
DALRO (South Africa, L, D, AGP), ESMMA (United Arab Emirates, M),
Hexacorp Ltd (United States, M), MCPS (United Kingdom, M), NexTone
(Japan, M), ORFIUM (Greece, M), SESAC (United States, M), Soundreef
(United Kingdom, M), UNISON (Spain, M).

ABOUT THE REPORT

DEFINITIONS

The International Confederation of Societies of Authors and Composers (CISAC) is the world's leading network of authors' societies. Every year, royalty income data is compiled from its 225 collective management organisation (CMO) members in 116 countries to generate this comprehensive global collection report. This 2023 report features figures based on the gross domestic collections of CISAC members in their respective countries. To avoid double-counting, only final royalties collected for the use of creative works are compiled. International exchanges among CMOs, which are based on reciprocal agreements, are excluded. Collections are presented globally, on a regional basis with focused data as well as split into the five CISAC repertoires that member societies represent: music, audiovisual, drama, literature and visual arts.

TYPES OF RIGHTS

CISAC member societies manage two main types of rights on behalf of their affiliated authors and publishers

Performing Rights

Performing rights let creators be remunerated when their works are performed in public, either through live performance or when a recording is played. These rights also apply when works are communicated to the public by radio, TV broadcast or by digital platforms (e.g., streaming services).

Reproduction Rights

Reproduction rights allow creators to be remunerated every time a copy of their creative work is made in any format, including physical copies (e.g., CDs) or a digital download. "Mechanical rights" is the term used to describe the right obtained by record producers to make a sound recording of a musical work. The term "reprography" pertains to copying literature and printed works.

Consumers are allowed to copy works from one device to another through a "private copying exception" to reproduction right, which exists in the laws of certain countries. Creators can be compensated for this exemption through a "private copying remuneration" in the form of a tax on blank digital media and electronic products with ability to store data.

Other Rights

In this report, references to "other rights" include all that do not fall under "performing rights" or "reproduction rights". These include royalties collected from private copying levy schemes, rental or public lending, educational use, synchronisation, exhibition as well as collections from auction houses and galleries for visual artists' resale right.

TYPES OF USE

Collection data is split by types of use. These include the following:

TV and Radio

Collections from the use of creative works when transmitted to the public by TV or radio broadcasters and from satellite or cable operators, and certain broadcast-related online services (e.g., catch-up TV). This use may involve exploitation of both performing and reproduction rights because a copy of the work is often made by the broadcaster before actual transmission occurs.

Live and Background

Collections for the performance of creative works in front of a live audience (e.g., playing, reciting or singing in public). This also includes collections from the use of works performed by other sources (e.g., recorded media, TV or radio broadcasts) played in public places. Background in hotel lobbies or restaurants, or as the main focus of a live audience at discotheques, clubs or karaoke bars fall under this category.

ABOUT THE REPORT

DEFINITIONS

Digital and Multimedia

Collections from licensing digital services (e.g., download and streaming platforms) as well as the use of creative works on digital recordable devices such as photographic images on USB keys. The exploitation of creative works covered under digital and multimedia may involve both performing and reproduction rights.

Compact Discs (CDs)

Collections from licensing mechanical reproduction of musical works primarily on compact discs as well as other types of sound carriers (e.g., vinyl records or cassettes).

Video

Collections from licensing musical works within audiovisual productions that are reproduced on DVDs or Blu-Ray.

Mechanical Reproduction

Collections from mechanical reproduction of works such as books, newspapers and brochures in drama, literature, and visual arts repertoires. In this report, the category excludes the reproduction of music on CDs or by other means since these have their own individual categories.

Reprography

Collections from reproduction of graphic works through mechanical or electrical means (e.g., photocopiers and printers). These are typically collected from manufacturers, importers or operators of devices that allow works to be reproduced.

Private Copying

Collections from manufacturers or distributors of blank media (e.g., recordable CDs or electronic devices) that have data storage capabilities such as audio and video recorders, smartphones and personal computers. Private copying levies compensate rightsholders for acts of copying carried out by individuals for their own personal use.

Resale Right

A small percentage of the sale price payment made to visual artists when their works are re-sold by an auction house or gallery. This right applies to paintings, sculptures, drawings, photographs and other visual works.

Rental and Public Lending

Collections from rental or lending an original or copy of a creative work to the public.

Synchronisation Right

Collections from incorporating a musical work within a soundtrack that is timed to accompany visual images. The work can be used either in full or in part. The right typically refers to audiovisual works (e.g., films, commercials and video games).

Exposition Right

Collections from the exhibition or showing of a work of art to a public, such as in museums.

Educational

Collections from educational establishments for the use of creative works in teaching. This may include the performance or display of a work by instructors as part of a course in a classroom.

CISAC GLOBAL COLLECTIONS REPORT: METHODOLOGY

The CISAC Global Collections Report is based on domestic collections reported to CISAC by its member societies. These are revenues collected by each society for the use of the repertoires it represents within its own country, or on a multi-territorial basis in certain cases (e.g., digital licensing in Europe).

The figures in this report exclude revenues received from sister societies to avoid duplication. Collections are gross collections before deductions for administrative, cultural or social purposes.

The Euro is the currency chosen for the report for consistency and comparison with previous years. 38% of collections declared to CISAC come from the Eurozone while 19% are expressed in US dollar, 8% in pound sterling and 9% in yen. Three-quarters of the global remuneration of creators for the use of their works are expressed in these four currencies.

For the current year, collections are expressed or converted in Euro at an average rate for 2022. Previous year figures are converted into Euro using the average rate of the corresponding year. Year-by-year comparisons are impacted by currency variations. These play a role when dealing with global or aggregated data in Euros. They have no effect on regional or national comparison expressed in the same local currency.

Collection figures have been rounded up to the nearest million or thousands, except for ranking purposes. In these cases, one decimal has been added. Percentages are calculated using the actual unrounded figures. In this 2023 report, country data from previous years may occasionally be corrected or re-stated in order to establish accurate like-for-like comparisons or to deal with the impact caused by changes in the number of CISAC members. When societies join CISAC and declare their income, this automatically increases revenues in their country. When societies stop being CISAC members, collections from their country appear to decrease compared to previous reports.

US digital rights income is excluded from this report as it was transferred in 2021 to the Music Licensing Collective (MLC) which is not a CISAC member. ■

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