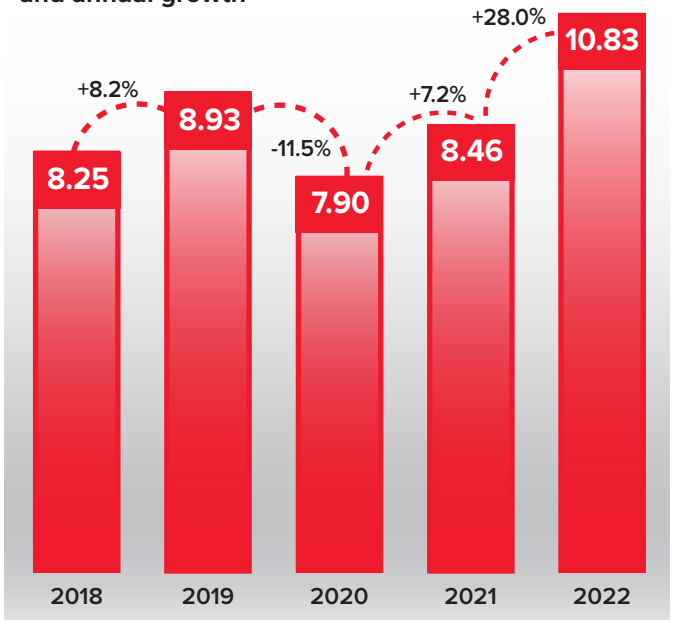
CISAC MUSIC GLOBAL COLLECTIONS 2023

HIGHLIGHTS AT A GLANCE

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.

Global music collections (EUR billion) **and annual growth**

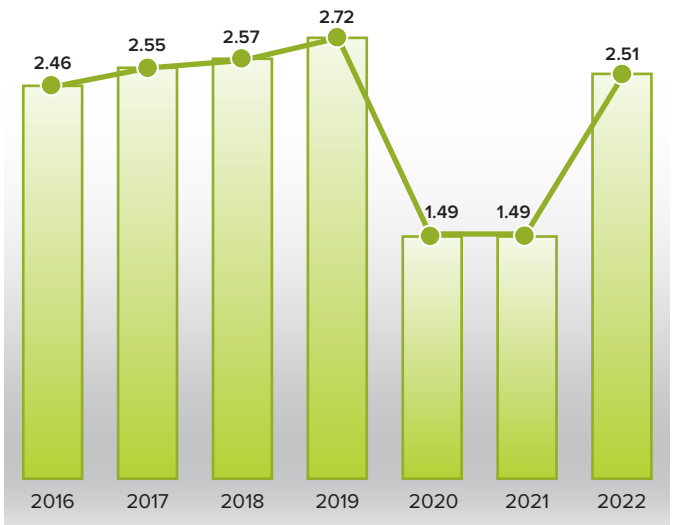


Strong streaming subscription income helped digital collections rise by a record +33.5% to become the largest income stream for music creators. Within the "live and background" category, royalties from live concerts rose +185.7% in 2022, according to a sample of more than 100 societies. Collections from TV and radio rose +11.4%. Global music collections are +21.4% above 2019.

LIVE AND PUBLIC PERFORMANCE MUSIC ROYALTIES GROW BY TWO-THIRDS

Music royalties from the live and public performance sector increased by a record +68.2% in 2022 as festivals, music tours and businesses reopened.

Music live and background collections (EUR billion)

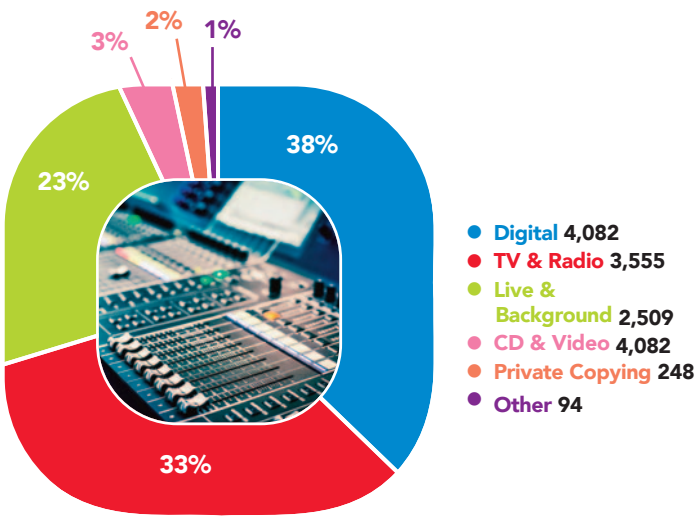


Despite exceeding EUR2.5bn, the sector total still fell short of complete recovery, remaining -7.7% below the pre-pandemic level. The majority of the growth was in Europe, which increased by almost three-quarters of a billion euros, while collections in Latin America more than tripled.

DIGITAL OVERTAKES BROADCAST AS MUSIC CREATORS' TOP INCOME SOURCE

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

Global mix of creator's income streams in 2022 (EUR million)

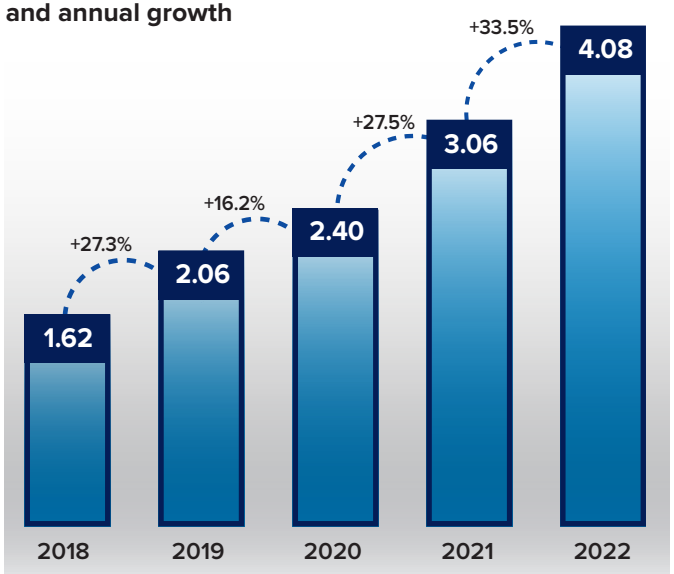


Digital income in 2022 accounted for 37.5% of all collections, dramatically up from just 19.6% in 2018. Digital's rise to become the largest income stream comes despite the continued resilience of TV and radio royalties, up +11.4% in 2022. The biggest minor income streams are CD and video at EUR344m and private copying at EUR248m.

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

Collections from the digital use of music creators' works increased by +33.5% in 2022 to reach EUR4.1bn. This follows more than a decade of growth, mainly of streaming income.

Digital music collections (EUR billion) **and annual growth**



Digital collections were substantially boosted by the pandemic and are now almost double the 2019 level. In the context of wider creative industry revenues, digital is still under-performing as an income source for most music creators served by CISAC members. Revenues here comprised 37.7% of all music collections, almost half the corresponding share (71%) in the recording industry.

DIGITAL DRIVES GROWTH IN SMALLER COLLECTING

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

Leading digital markets by share and 3-year growth rate

Country/Territory	Market share	Digital 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%
AUSTRALASIA	64.5%	+111.1%

GROWTH IN ALL OF THE WORLD'S LARGEST MUSIC MARKETS

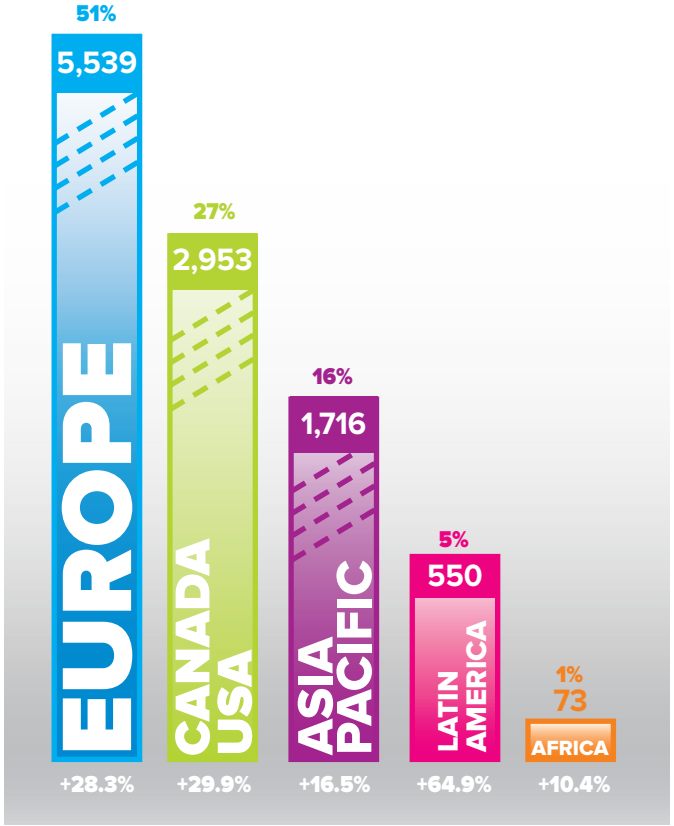
Every one of the world's ten largest music markets increased in 2022 with the average growth rate exceeding +25%. Just Italy and Japan remained below their pre-pandemic levels at -5.8% and -4.1% espectively.

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

Country/Territory	Collections	Growth 2022	Growth 2019-2022
UNITED STATES	2,616	+30.5%	+33.4%
FRANCE	1,325	+39.3%	+28.1%
UNITED KINGDOM	1,011	+24.3%	+34.3%
GERMANY	903	+17.9%	+10.6%
JAPAN	848	+3.6% (+10.1%*)	-4.1% (+8.4%*)
ITALY	448	+45.6%	-5.8%
AUSTRALASIA	345	+30.6%	+35.2%
CANADA	338	+25.7%	+31.3%
SPAIN	274	+37.4%	+35.4%
KOREA, REPUBLIC OF	247	+22.9%	+56.0%
TOP 10 TOTAL	8,355		
GLOBAL TOTAL	10,832		

* in local currency

LATIN AMERICA LEADS MUSIC GROWTH TABLE AS ALL REGIONS EXPAND

Every region saw growth in 2022 with Europe remaining the largest at more than half the global music total. Strong growth in North America slightly narrowed the gap to second place whilst revenues in Latin America increased by +64.9%, helped by the trebling of live and background music income.

Share and growth of collections by region
(EUR million)