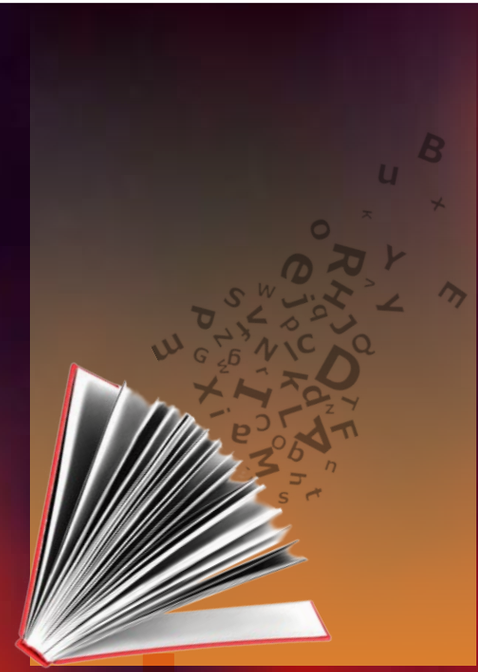
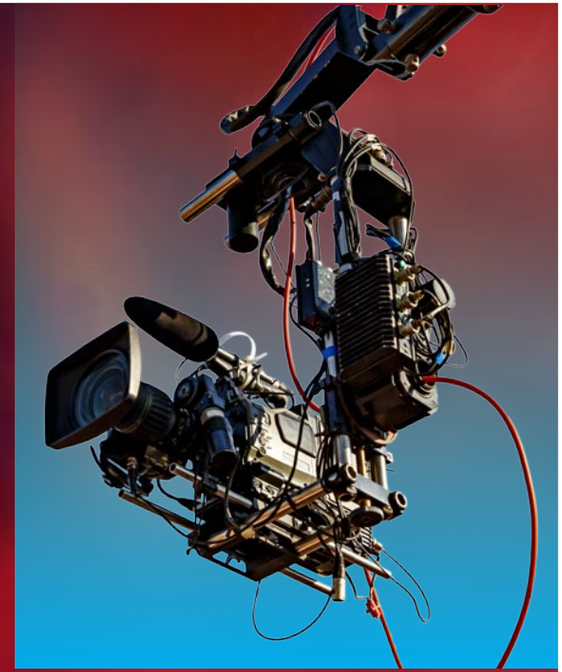
CISAC GLOBAL COLLECTIONS REPORT 2024

FOR 2023 DATA





CISAC

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 227 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.

227 COLLECTIVE MANAGEMENT ORGANISATIONS

+5M CREATORS

MUSIC

AUDIOVISUAL

DRAMA

LITERATURE

VISUAL ARTS

116 COUNTRIES/TERRITORIES

EUROPE
47 countries
110 members

CANADA/USA
2 countries
11 members

ASIA-PACIFIC
17 countries/territories
30 members

LATIN AMERICA & THE CARIBBEAN
22 countries - 46 members

AFRICA
28 countries
30 members

Foreword

BJÖRN ULVAEUS
President of CISAC

AI PROVIDERS MUST RESPECT HUMAN CREATORS: IT'S A WIN-WIN FOR US ALL

Congratulations to CISAC on the publication of another comprehensive, high-quality Global Collections Report.

There is a lot of good news in these pages. Collections by CISAC member societies are growing healthily; CMOs are serving members more efficiently, especially in the digital market; and the global collective management system, despite the many challenges it faces, is proving its enduring value to the creators it represents.

Royalty payments help sustain creators' livelihoods and careers. They are, in effect, the measure of the cultural and economic value of the CISAC network. And that value is entirely founded on authors' rights. Now, more than ever, we must remember that as we look ahead to the future.

Today, we are on the cusp of an enormous change. AI is shaking up our landscape, and, even as it does so, its impact is still unknown. Generative AI tools are producing contents that are based on, and sometimes risk replacing, the works of human creators. They are routinely and systemically feeding the training set of AI providers, and generating big revenues as a result. There is rarely transparency in this process, making it impossible for rights holders to identify the use of works and, if necessary, enforce their rights.

I am a user and a big fan of AI tools. I have always believed we can only ever embrace new technology, not try and stop it – but there is a rock-solid caveat: this must never be at the cost of compromising copyright and human rights. The recent studies estimating what this could cost to creators in lost income, from France, Germany, Australia and New Zealand, are an alarm call to us all. I believe that a badly-regulated AI environment could wipe out many artists' careers. That could be the next Paul McCartney or Taylor Swift.

The message now to AI providers is clear: play fair; collaborate with us, in a way that benefits us all. Respect the creators who are fuelling the AI revolution; implement effective transparency mechanisms; negotiate with and get licensed by rights holders; share fairly the vast potential AI revenues with creators; and take proactive steps to comply with copyright laws and transparency obligations.

Around the world, there are legislative reviews where policy makers also need to hear these

messages and implement them into law. From Hong Kong to Canada, from Brazil to Japan, the overriding mantra must be: please do nothing to weaken creators' rights. Instead, harness AI to make it work to the benefit of creators, consumers, culture and the economy. It is a win-win deal.

It's time for tech companies, creators, and policy makers to come together. Only a new level of collaboration, backed by legal instruments, will achieve a safe and fair AI environment. The rewards of our joint efforts, if they succeed, will be immense.

THE MESSAGE NOW TO AI PROVIDERS IS CLEAR: PLAY FAIR; COLLABORATE WITH US, IN A WAY THAT BENEFITS US ALL. RESPECT THE CREATORS WHO ARE FUELLING THE AI REVOLUTION.

Foreword

MARCELO CASTELLO BRANCO
Chair of the CISAC Board

BEYOND THE NUMBERS, INTELLECTUAL PROPERTY HAS NEVER BEEN MORE IMPORTANT TO US

This 2024 CISAC Global Collections Report shows a successful performance by the CISAC global network, and we should take a moment to celebrate our achievements. However, it is essential that we elevate our ambitions further. We have to firmly reject the notion that creation—whether in music, audiovisual, visual arts, literature, or drama—is merely a commodity or a tool in the attention economy.

Our market environment is full of uncertainties, and while we take pride in present growth, our priority now needs to be long-term sustainable growth to ensure the livelihoods of the creators we represent. This raises critical questions which, with CISAC's help, our societies need to address.

How can we ensure the long-term growth of creative content? How can we adapt without compromising the values we proudly uphold for the more than 5 million creators worldwide? How can we drive global growth while simultaneously fostering local cultures and cultural exchange?

How can CMOs navigate the complexities of decision-making that impact the livelihoods and sustainability of creators? With the increasing mergers and acquisitions affecting our sector, and multinational private funds with apparently limitless financial resources, how can we mentor our members with knowledge, facts, and insights, ensuring they are aware of both risks and opportunities?

One critical need for our community has to be the improvement of transparency in our markets. For example, it is clear that the pricing models of digital platforms are hard to follow and difficult to explain. The many discussions about their algorithms remain unresolved. As these platforms mature, we should demand more transparency and accountability, rather than simply waiting for scalability to solve the challenges of fair remuneration.

We also need to relentlessly look ahead to the future. As societies that handle diverse repertoires, we must not underestimate the significance of alternative sources of collection, which are currently overshadowed by digital growth. History has proven that over-reliance on a single income stream can be risky. Fostering diversification and enhancing all collection avenues—evidenced by the remarkable 22% growth in live and public

performances—is crucial for ensuring that we fully explore and cover the usage of our creators' repertoires.

Another key highlight of this report is the growth of Latin America, showcasing a remarkable growth of 114.6% over the past two years. What more can we do to make sure Asia-Pacific keeps its growth momentum, and the African region grows collections in a way that matches the richness of its culture and potential?

The revolution that AI is frenetically proposing, will demand actions and reactions that will define our future creative ecosystem in ways we cannot predict.

As we reach the end of the first quarter of this century, there will be more questions than answers. Nevertheless, what is indisputable is that intellectual property has never been more at the centre of our existence.

I urge everyone to look beyond the numbers and work collectively to better serve our members and support the flow of their creative work.

ENHANCING ALL COLLECTION AVENUES IS CRUCIAL FOR ENSURING THAT WE FULLY EXPLORE AND COVER THE USAGE OF OUR CREATORS' REPERTOIRES.

Foreword

GADI ORON
Director General of CISAC

POST-COVID RECOVERY NOW COMPLETE, BUT AI IS OUR GREATEST CHALLENGE

I am pleased to introduce our annual CISAC Global Collections Report.

This year's figures, for royalties collections by CISAC members in 2023, paint a positive picture of a healthy, stable and promising sector. Overall, collections on behalf of creators reached a new all-time high of EUR13.1bn, an impressive +7.6% increase. During the last five years, CISAC members have added over EUR3bn to the amounts they collect for authors and copyright holders. This, in itself, is a major achievement and shows the strength of the collective management system.

However, there are two other key stories behind the figures: the recovery of the live sector and growth in the digital market.

The live and public performance income stream bounced back buoyantly. For the first time, the amounts collected by CISAC societies for background music, live concerts, exhibitions and entertainment, exceeded their 2019 pre-COVID level reaching EUR3.28bn, fueled by the growing number of live concerts and tours around the world. Yet, despite this success, the sector is fragmented and in many areas, fragile. At the grassroots level, venues are closing and local events struggling. Support from governments to protect the live sector has never been more important.

Digital royalties remain the biggest driver of collections. Globally, these grew by a healthy +9.6% in 2023, to EUR4.6bn. Since 2019, CISAC societies have collected an additional EUR2.5bn in digital royalties, a five-year growth of +120%.

This impressive growth is helped by the continued popularity of streaming consumption, subscription services introducing long-overdue price rises, and the efforts of our societies to extract more value from the market.

Particularly eye-catching are some of the smaller markets, many in Asia-Pacific where digital now represents the vast majority of collections. This points to opportunities and challenges. On one hand, societies in countries like Indonesia and Vietnam report digital royalties accounting for more than 80% of their total collections. On the other hand, it is those particular market where digital income is so dominant, which are seeing a constant struggle to achieve fair value for creators, against a "free content" culture. CISAC's mission remains to support our members in maximising the value of creators' works and ensure that the digital market remains stable and continues to grow.

Foreword

GADI ORON

Director General

One thing our numbers do not show – not yet – is the impact of generative AI. Future editions in the years ahead will do so but, in the meantime, securing a safe environment for creators in the AI era is CISAC's top priority. It is critical that AI is used to enhance human creativity, not undermine or replace it. The stakes could not be higher for the creative sector, and forecasts indicate just what the damage could be if we, the tech sector and policy makers, get this wrong.

A joint study by CISAC members SACEM (France) and GEMA (Germany) on the impact of generative AI on the music sector suggests 27% of creators' revenue is at risk in the medium term. In another study by APRA AMCOS (Australasia), 82% of music creators were concerned that AI could lead to them no longer being able to make a living from their work. There is no question that decisions made by policy makers in the near future will have a huge influence on the future for creators and of our culture.

This Report gives a unique overview of the economic and cultural value of our global CISAC community. Despite the challenges we face, I am optimistic about our future. Collections are growing in every sector and across every region, underpinning the strength of our societies and the collective management system. This report highlights the positive outlook.

CISAC'S MISSION REMAINS TO SUPPORT OUR MEMBERS IN MAXIMISING THE VALUE OF CREATORS' WORKS AND ENSURE THAT THE DIGITAL MARKET REMAINS STABLE AND CONTINUES TO GROW.

2023 GLOBAL COLLECTIONS

13.09

+7.6%
GLOBAL COLLECTIONS
(EUR billion)

4.62

+9.6%
DIGITAL
(EUR billion)

3.89

-4.0%
BROADCAST
(EUR billion)

3.28

+22.0%
LIVE & BACKGROUND
(EUR billion)

CISAC GLOBAL COLLECTIONS REPORT

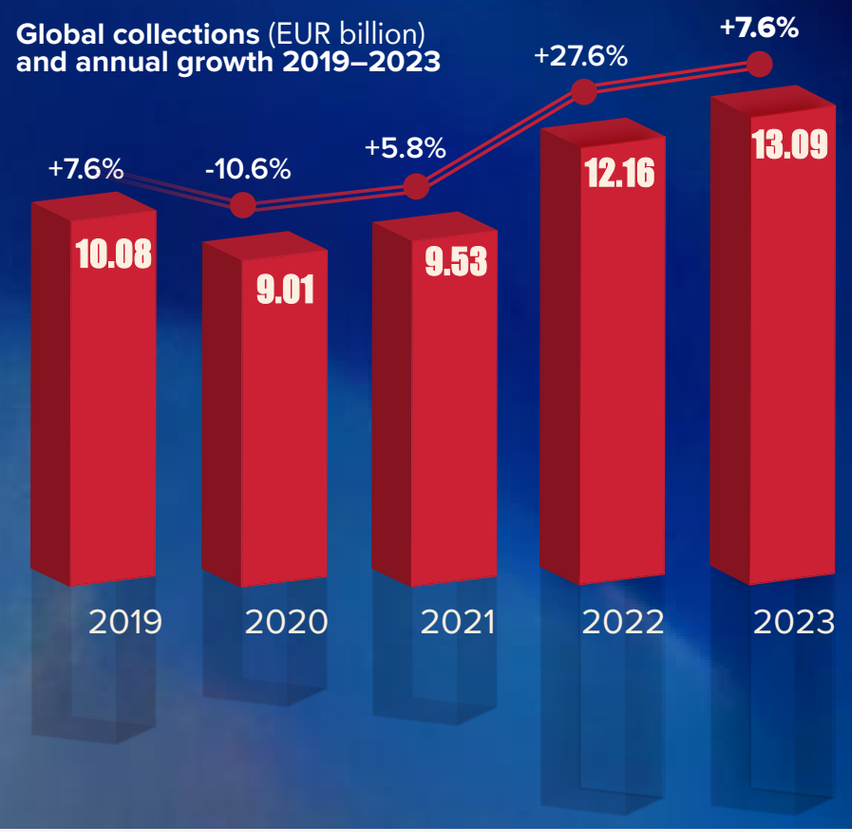
Highlights at a glance

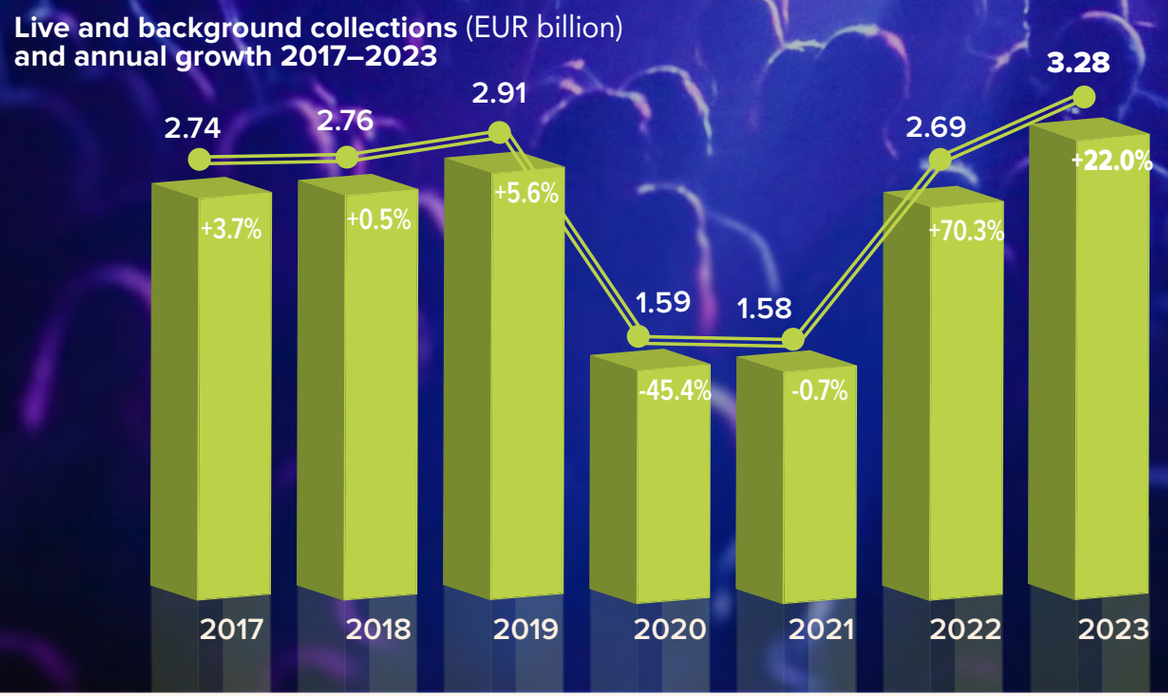
GLOBAL COLLECTIONS UP +7.6% TO ALL TIME HIGH

Global royalty collection for creators rose by +7.6% to a new record high of EUR13.09bn in 2023.

The increase was driven by continued steady growth in digital income thanks to streaming subscription, and a strong recovery in live and public performance activity after three years of disruption by the pandemic.

Global collections have now completed their rebound and in 2023 were +29.9% above their 2019 pre-pandemic level.





LIVE AND PUBLIC PERFORMANCE SEES STRONGEST GROWTH, UP +22%

Collections for live and public performance, including concerts, exhibitions and licensing of venues and businesses, continued their robust recovery across all regions.

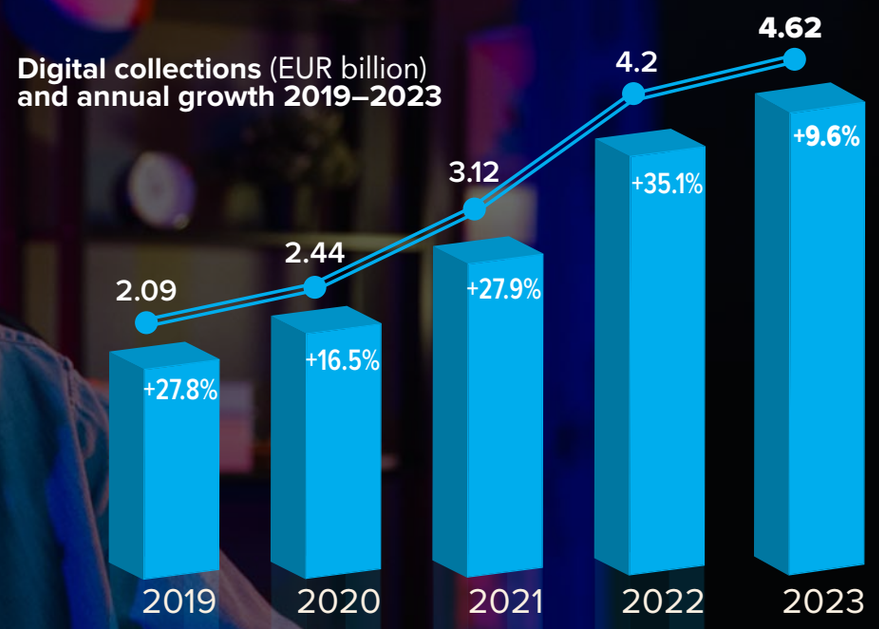
This sector has now reversed the disastrous losses from the COVID years and stands +12.6% above 2019 at an all-time high of EUR3.28bn. Latin America and Asia-Pacific, regions that were slower to return, saw the fastest recovery in activity.

DIGITAL INCOME UP +9.6% AS GROWTH RATE DECLINES

After a decade of strong annual double-digit growth, digital collections growth slowed to +9.6% as the streaming subscription market starts to mature in larger territories.

Digital growth was helped by continued rises in streaming consumption, expanding platforms and price increases by subscription services. However, despite overall streaming revenue growth, the vast majority of creators are not enjoying increased royalties from digital.

Digital collections are generally growing faster in smaller and developing markets where streaming provides a relatively large share of creators' remuneration.



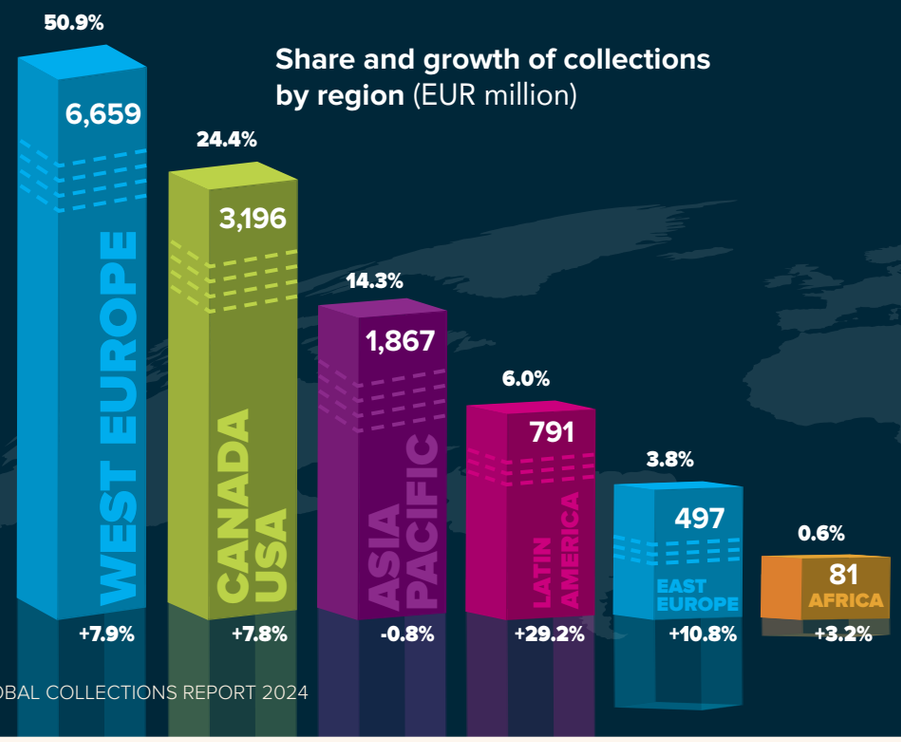
REPERTOIRES SEE GROWTH

All repertoires covered by CISAC member societies, except visual arts, saw growth in 2023. Visual arts suffered from a weaker art market. The drama sector led the growth rates for a second year running as theatre and drama performances continued to recover following the pandemic.

Collections by repertoire and growth, 2023 (EUR billion)

Repertoires	Collections	Growth
Music	11.75	+7.6%
Audiovisual	0.70	+8.3%
Dramatic	0.21	+24.9%
Literary	0.22	+2.1%
Visual Arts	0.22	- 1.4%
GRAND TOTAL	**13.09**	**+7.6%**

Share and growth of collections by region (EUR million)



LATIN AMERICA LEADS ROYALTIES GROWTH

For the second year running, Latin America and the Caribbean was the region with the strongest collections growth.

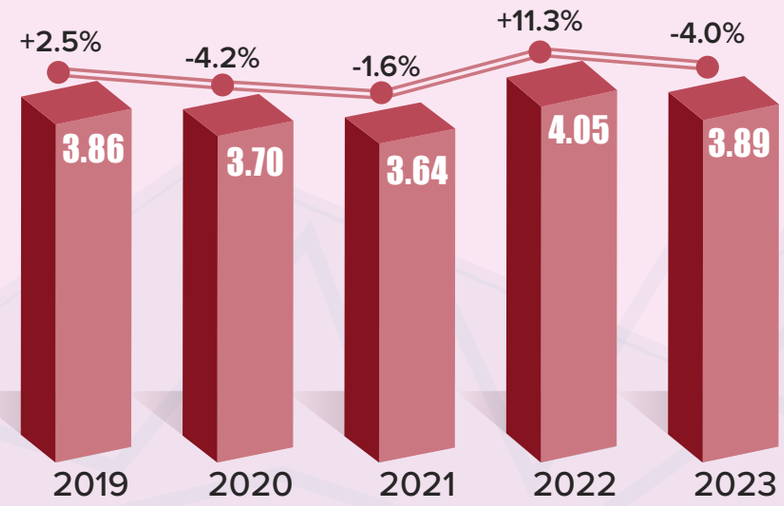
Royalties in this region were up +29.2% in 2023 due to a huge rebound (+57.9%) for live concerts and public performance, combined with new deals and increased subscription to digital platforms. Latin American collections have risen by +114.6% over the last two years, helped by strong local repertoire in major markets such as Brazil and Mexico.

Europe remains the region with the largest collections, having a 54.7% share of the global total. Asia-Pacific declined -0.8% partly because of exchange rate fluctuation in Japan without which (at a constant exchange rate) the region would have seen a +7.2% growth.

TV AND RADIO: GRADUAL INCOME DECLINE

Broadcast collections fell by -4.0% in 2023. TV and radio income was +0.7% ahead of 2019. Societies report a continued gentle plateau in collections for traditional radio and TV income. Royalties are most affected by the fall in viewer numbers and TV advertising income. Back in 2013, TV and radio made up 46% of CISAC's total collections. By 2022, it was overtaken by digital for the first time. It dropped to 30% in 2023.

TV and radio collections (EUR billion) **and annual growth 2019–2023**



TOP TEN MARKETS ADD EUR1.5BN

Most of the world's ten largest collecting countries saw growth in 2023. The growth rate across these large markets was +6.4%. This compares to total growth of +7.6% among all markets.

Collections per country (EUR million) **and growth in 2023**

Countries/ Territories	Collections	Growth 2023
UNITED STATES	2,839	+8.1%
FRANCE	1,777	+4.7%
UNITED KINGDOM	1,174	+7.4%
GERMANY	1,039	+7.8%
JAPAN	895	-3.0% (+6.8%)*
ITALY	698	+22.9%
AUSTRALASIA	427	+0.1% (+7.5%)*
CANADA	357	+5.7%
SPAIN**	330	-1.5%
NETHERLANDS	316	+7.6%
TOP 10 TOTAL	**9,852**	
GLOBAL TOTAL	**13,091**	

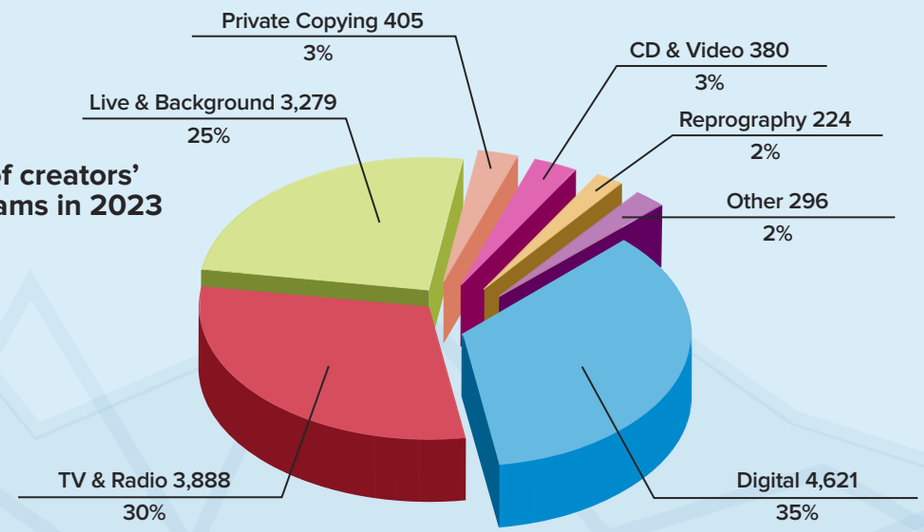
* in local currency
** impacted by back-payments in 2022, without which Spain would have shown growth in 2023

DIGITAL PULLS AWAY FROM BROADCAST AS CREATORS' TOP INCOME SOURCE

As consumption patterns change, royalties from traditional TV and radio declined -4% to EUR3.89bn in 2023.

Creators' royalties are gradually shifting to digital, which is now significantly the largest income stream with a 35% share, compared to 30% for broadcast and 25% for live and public performance. TV and radio collections have stayed resilient and are now +0.7% above their pre-pandemic level of 2019.

Global mix of creators' income streams in 2023 (EUR million)

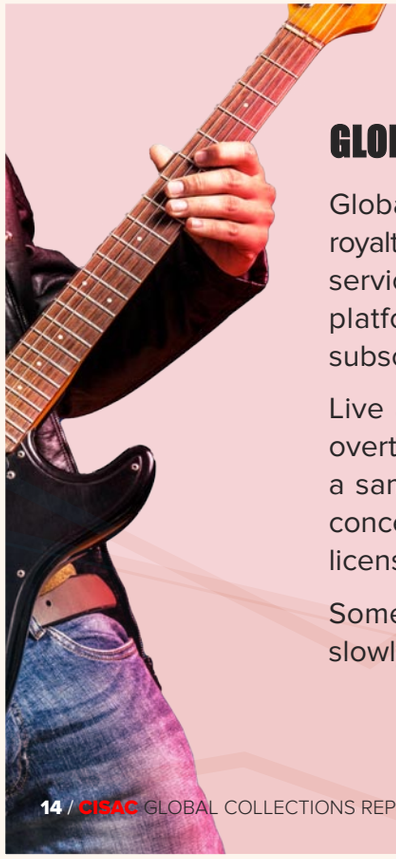


DIGITAL: A LIFELINE FOR CREATORS IN MORE MARKETS

In a rapidly growing number of smaller markets, digital is the only significant collections stream, accounting for more than two-thirds of all income. These territories are generally seeing faster growth in digital than the more established markets of Europe and North America.

Leading smaller markets by digital share (2023) and growth 2019–2023

Country/ Territory	Market Share 2023	Growth 2019–2023
VIETNAM	84.3%	+270.4%
INDONESIA	83.3%	+111.6%
PHILIPPINES	80.3%	+325.8%
INDIA	74.2%	+493.6%
HONG KONG	68.7%	+43.1%
THAILAND	66.2%	+181.0%
MEXICO	65.6%	+242.1%



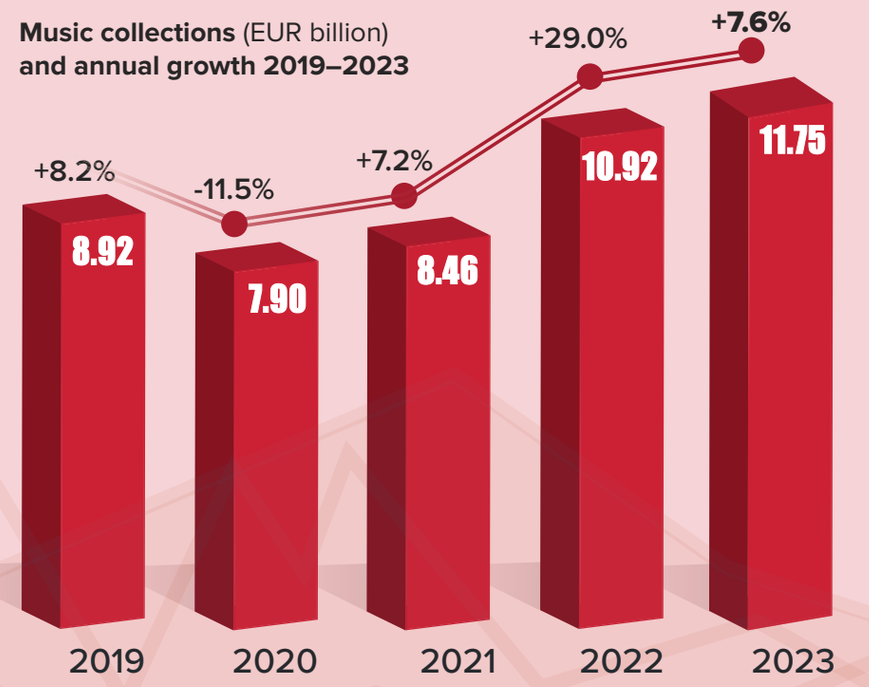
GLOBAL MUSIC COLLECTIONS RISE +7.6%

Global music royalties grew by +7.6% to EUR11.75bn. Digital royalties rose +9.6% as steadily increasing uptake of subscription services worldwide combined with price increases across all platforms. There was also especially strong growth in the subscription video sector.

Live and public performance grew strongly, up +21.8%, to overtake pre-pandemic levels for the first time. According to a sample of over 100 music societies, collections from live concerts and festivals grew +36.5%, while public performance licensing revenue rose by a smaller +10.9%.

Some live and background streams have recovered more slowly, for example, karaoke in Japan and China.

Music collections (EUR billion) **and annual growth 2019–2023**

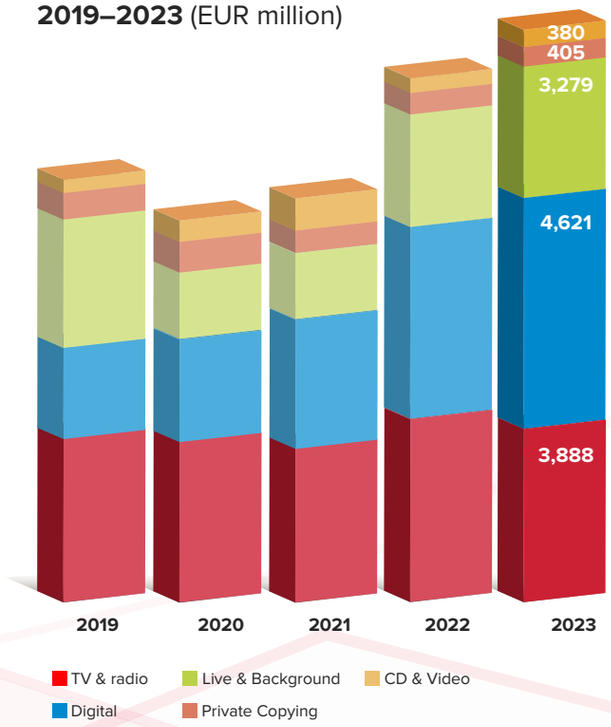


2023 market analysis

DIGITAL AND LIVE DRIVE +7.6% INCREASE IN GLOBAL ROYALTY COLLECTIONS

Global collections in 2023 increased by +7.6% to a new record high of EUR13.09bn. This was led by continued steady growth in digital income, which moved further ahead of broadcast as creators' largest royalty source on the back of streaming subscription revenue increases. There was also a strong recovery in live and public performance activity, which after three years of disruption caused by the pandemic grew by +22.0% year-on-year to finish nearly +12.6% above pre-COVID levels.

Creators' major collections sources, 2019–2023 (EUR million)



The five-year trend of creators' most important royalty sources highlights a major shift in the balance of income streams, notably the rapid growth of digital collections. Digital income has more than doubled in five years, rising by +120.7% since 2019. This has helped collections as a whole grow by +29.9% during this time.

By contrast, TV and radio income has risen only marginally during this period to drop below digital. The full recovery of the live and background sector, including concerts, exhibitions and public entertainment, is highlighted by income now +12.6% above where it was before the start of the pandemic.

As a result of all the additional royalty income generated since 2019, 84% of it comes from digital—and the vast majority of that from the spread of subscription streaming.

84% of collections growth since 2019 comes from digital

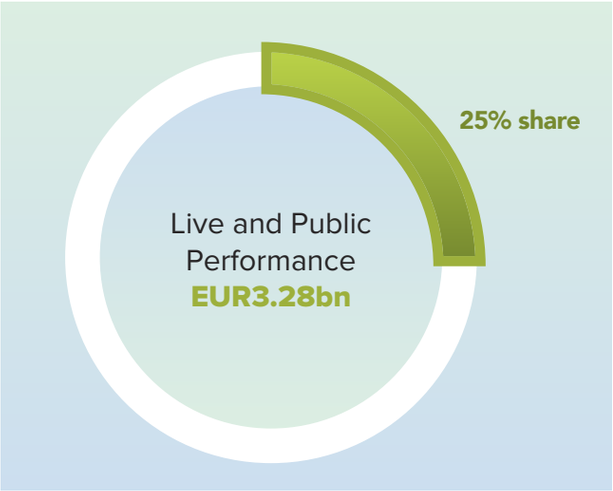
Market trends uniform for large and small markets

Analysis of global collections data over the last five years shows that, despite varied conditions in different territories, the trend over the past five years has been broadly the same for societies in large and small markets.

Ranked by size, the top ten national markets saw collections grow by +29.6% between 2019 and 2023. Markets ranked 11 to 20 and 31 to 40 grew by +35.3% and +38.1% respectively.

LIVE AND BACKGROUND MOVES ABOVE PRE-PANDEMIC LEVELS

Live and public performance collections delivered the biggest percentage growth for a second consecutive year, with income rising by +22% to an all-time high of EUR3.28bn. Having been the first sector impacted by the pandemic, in 2023 this sector became the last to return to pre-COVID levels.



Live and public performance has taken five years to match pre-pandemic levels, with income now +12.6% higher than in 2019. The trend has restored live and public performance to one-quarter of total global collections, having hit a low of 16.6% in 2021. All regions reported further strong recoveries in live and background collections in 2023, including for concerts, exhibitions and licensing venues and businesses.

Live music outpaces recovery of other sectors

Data gathered by CISAC uniquely for the music sector show an important rebalancing of income streams within the overall live and public performance section. The data, collected from more than 100 CISAC member societies, breaks down royalties creators received in a wider range of entertainment activity. It reveals, in particular, a marked difference in the trends for the two largest segments—live concerts and background music.

Live music royalties increased by +24.0% since 2019, while background rose by +6.1%. By contrast, other income channels have as yet failed to recover from the pandemic: authors' collections for karaoke total EUR118.2m, which is -23.9% lower than in 2019. In its largest market, Japan, karaoke income is expected to return to growth in 2024 but against a longer-term trend, even before COVID, of gradual decline. Similarly, cinema royalties, at EUR85m, are -17.9% down on pre-COVID levels.

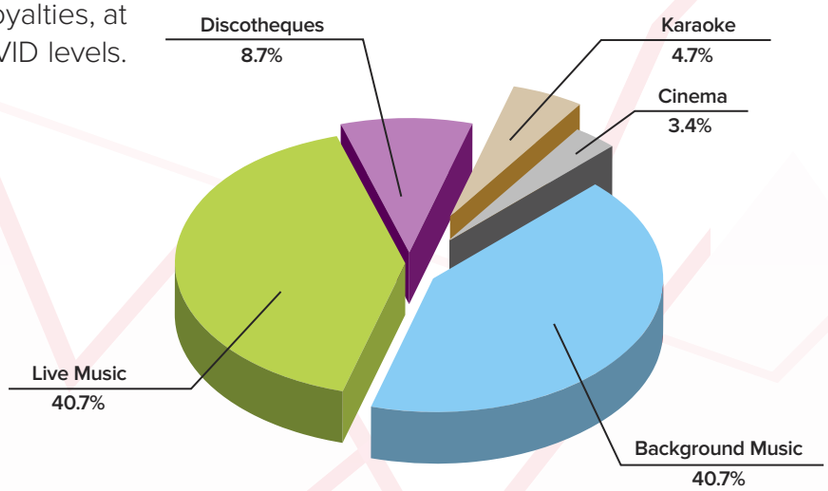
This is mirrored in other data. Although global box office revenues increased by +29.4% in 2023, WIPO and Omdia figures reveal they were still nearly USD9bn lower than in 2019.

The data confirms a mixed picture in trends of different revenue sources since COVID.

Live and Background growth of main income streams 2019–2023 (EUR million)

Use category	2019	2023	Growth 2019–2023
Background music	972	1,032	+6.1%
Live music	832	1,031	+24.0%
Discotheques	196	220	+11.9%
Karaoke	155	118	-23.9%
Cinema	104	85	-17.9%

Live and background main income streams in 2023



Latin America leads growth

Latin America and Asia-Pacific, whose live sectors were slower to return after the pandemic, are now seeing the fastest recovery. In Latin America, income grew by +57.9% year-on-year and was +32.7% ahead of 2019, with Brazil outperforming global trends. This was helped by significant renewed demand in the market for live festivals. Asia-Pacific was up +18% on the year as live concert collections increased substantially in Japan, driven by higher attendances and a rise in the number of large-scale concerts held in urban areas. However, the Asia-Pacific region has been the slowest to recover and is the only region that has yet to match pre-pandemic levels.

Growth of Live & background collections by region

Region	2023	Growth 2019–2023
AFRICA	+13.7%	+8.0%
ASIA-PACIFIC	+18.0%	+0.8%
CANADA/USA	+22.7%	+21.3%
LATIN AMERICA	+57.9%	+32.7%
E. EUROPE	+22.2%	-2.2%
W. EUROPE	+19.4%	+12.3%
GRAND TOTAL	**+22.0%**	**+12.6%**

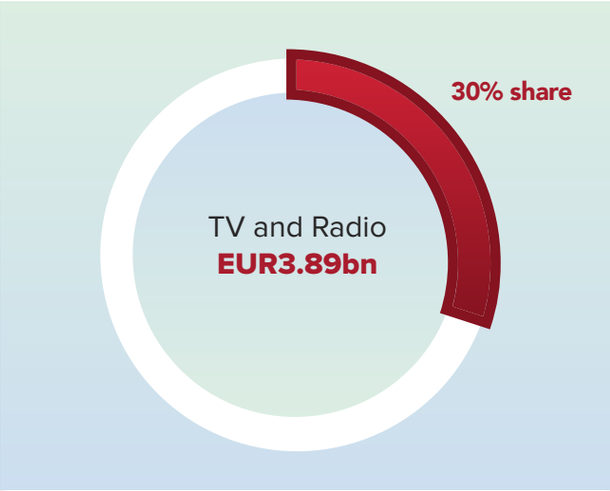
Mixed outlook for live sector, especially small venues

Live music industry publication, Pollstar, described 2023 as "a colossus, the likes of which the live industry has never before seen" as it reported that total grosses for the year's worldwide top 100 tours were up by +46% on the previous year. Buoyant festivals and tours, and pent-up demand in previous years combined with higher prices to drive this boom. This positive outlook was echoed in May 2024 by global events company Live Nation, stating that: "Global fan demand is stronger than ever. More artists are out on the road and more revenues are being added to bring them together".

However, while superstar artists such as Taylor Swift and Beyoncé are propelling record revenues at the top end of the market, it is a different story at the grassroots level, with the number of venues declining dramatically in many markets. This includes Australia, which, despite the live music industry enjoying a record year in 2023, has lost 1,300 small- and mid-sized live music venues since the start of the pandemic, according to APRA AMCOS's annual report (see Australia's "Revive Live" campaign page 42).

TV AND RADIO: INCOME DROPS MARGINALLY

Broadcast collections fell by -4.0% in 2023 as digital extended its lead as creators' biggest royalty source. TV and radio income was +0.7% ahead of 2019. Societies report a continued gentle plateau in collections for traditional radio and TV income.



Broadcast remains a significant and resilient source of income for creators, but changing consumer behaviour is driving a continual shift to digital. Traditional broadcasters are increasingly shifting to digital progamming to compete with subscription video platforms. Royalties are most affected by the fall in viewer numbers and TV advertising income.

Back in 2013, TV and radio made up 46% of CISAC's total collections and digital just 6%. By 2022, broadcast's share had fallen to 33% when it was overtaken by digital for the first time. It dropped to 30% in 2023.

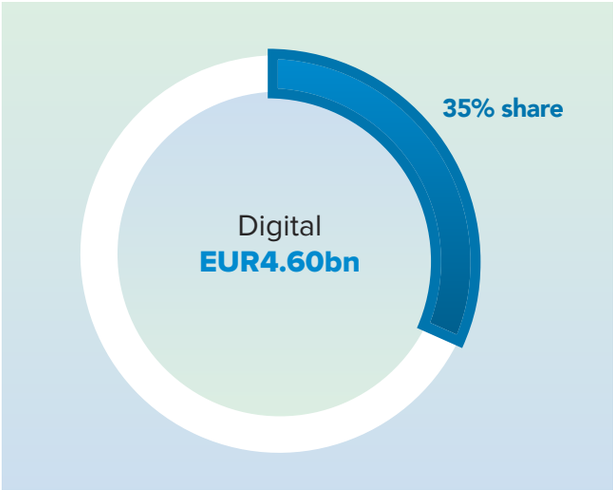
The growth of subscription video on demand services is thought to be compensating for the decline of traditional TV broadcasting in many markets. Nielsen data reveals that in May 2024, streaming claimed an all-time high of +38.8% of US TV viewing, led by YouTube, Netflix, Hulu and Prime Video. This was up 2.2 percentage points on the same month in 2023, with broadcast and cable combined taking just over 50% of the market.

Advertising revenues are helping to power this switch in broadcast income. This trend is highlighted by figures from GroupM, the world's leading media buying agency, which forecasts that global advertising revenue will grow by +7.8% in 2024 to USD898.8bn. It is then predicted to surpass USD1trn in 2025, led by digital ad growth.

CISAC's network of CMOs continues to play a key role in deriving value from creators' works used on TV and radio. This work includes many markets where linear TV and radio remain widely used, digital has a lower penetration and where there is greater engagement with traditional broadcast platforms.

DIGITAL WIDENS GAP AS CREATORS' MAIN INCOME SOURCE

Digital revenues are the most important lifeline for creators worldwide. Having overtaken broadcast to become creators' largest revenue source in 2022, digital further extended its lead in 2023 with +9.6% income growth to EUR4.60bn. This was +120.7% higher than in 2019 and accounted for 35% of total collections.



The increase reflects continued organic subscriber growth in the digital market, as well as the first price rises introduced by the main music streaming services. Spotify reported having 246 million premium subscribers in Q2 2024, up +12% year-on-year. It expected to add 5 million net new subscribers in Q3.

Spotify also rolled out its second wave of price rises in a year in 2024. However, controversially, for the US increase, it reclassified its premium tier as a "bundle", which now includes audiobooks alongside music. Under statutory rates agreed in 2022 between DSPs and publishers, bundles pay a lower mechanical royalties rate. The move was widely criticised by songwriters, publishers, their representative groups and some leading US politicians.

Streaming is not working for most creators

Despite digital now established as their biggest income source, the vast majority of creators say streaming income cannot support a career or livelihood. This is especially true for those outside the small coterie of highly successful artists, and those who cannot rely on other income streams, such as performing live, to build their career. The issue is becoming more critical as digital's share of collections grows.

CISAC members cite multiple reasons for this situation. One is the growing long tail of creators that is expanding at a far faster rate than revenue is rising, as well as more releases in the market. Research analysts Luminate says an average of 120,000 new recordings a day are now being added to streaming services.

Most societies have seen huge increases in membership over recent years, increasing the overall "pie" of royalty recipients getting paid. For example, UBC in Brazil has seen its members rise from about 9,400 in 2009 to more than 68,000 in 2024. In the UK, PRS for Music's membership grew by 10,000 in 2023, more

than in any previous year. Despite the audio streaming market in Germany having increased by almost 10% in 2023, GEMA says the revenues it delivered barely increased from the year before.

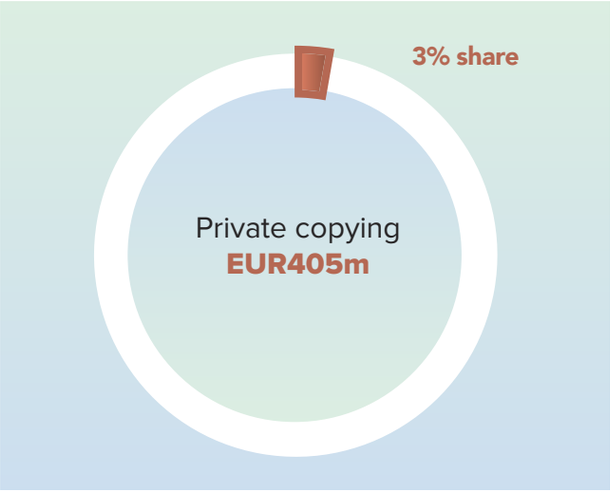
Digital value challenges

The issue is exacerbated in markets where digital is an exceptionally significant collections source, accounting for two-thirds or more of all income. This includes many markets in the Asia-Pacific region, which has a higher dependence on digital income than other regions.

An example is India, which has seen years of strong subscription streaming collections growth and is home to one of the world's fastest-growing audiences for creative works. Streaming growth has helped push India from 37 to 26 in the global collections rankings between 2019 and 2023. Despite this, local CMOs are challenged by a long-established culture of "free content" where the vast majority of music and video subscribers are on free or very limited payment deals.

Authors' societies work relentlessly to negotiate with DSPs rates that reflect the true value of creators' works. Hugely popular platforms such as TikTok pose another challenge, paying out lower levels of revenue for creative content than DSPs or other social media companies.

PRIVATE COPYING: A KEY INCOME STREAM RETURNS TO GROWTH



After two consecutive years of decline, private copying returned to growth in 2023 with income increasing by +9.7% to EUR405m. Although this is down from its peak of EUR470m achieved in 2020, it is now established as creators' fourth biggest income source behind digital, TV and radio, and live and background, but ahead of CD and video.

Private copying provides a vital source of remuneration for creators and rightsholders around the world, being paid whenever digital media and devices that can copy works are sold. In territories where such levies exist, they can help to fund investment in a range of cultural programmes and activity.

In France, SACEM invests 25% of the revenue generated by private copying in cultural and social programmes, which includes supporting the development of songwriters' careers and artistic and cultural education. In 2023, this investment totalled EUR22.5m and supported 3,657 cultural projects.

CISAC actively works with member CMOs in many countries to implement effective private copying legislation. This includes West Africa, where it worked with the eight-member-state UEMOA (West African Economic Monetary Union) on a regional Directive harmonising rules on private copying. This was unanimously adopted by UEMOA's Council of Ministers in September 2023. Prior to this, only two of UEMOA's member states—Burkina Faso and Côte d'Ivoire—had a functional private copying scheme.

James Duvall,
Principal Analyst,
Futuresource Consulting

BEYOND THE 100-BILLION-DOLLAR BARRIER – CAN THE MUSIC AND VIDEO LANDSCAPE CONTINUE TO EXPAND?

How will the future unfold, as streaming services hit saturation point in their core developed markets? Futuresource Consulting's Head of Entertainment, James Duvall, takes us through the numbers and explores the future outlook.

STREAMING GROWTH STEADY BUT SOFTENING

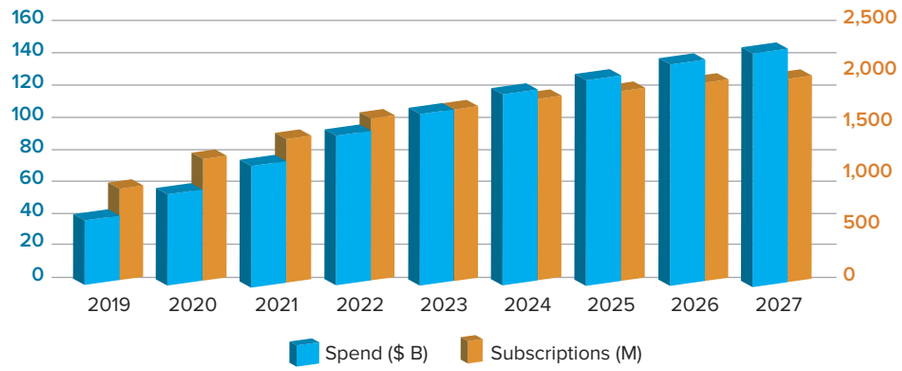
Video streaming has gone into overdrive, breaking through the US$100 billion barrier in 2023, and achieving a global value compound annual growth rate (CAGR) of 28% between 2019 and 2023. Over the same period, video on demand subscriptions (SVOD) grew by a CAGR of 17%, demonstrating that consumers have reacted favourably to price rises.

Music streaming has seen a similar trend, achieving a value CAGR of 21% over the same period, with a 24% increase in subscription uptake.

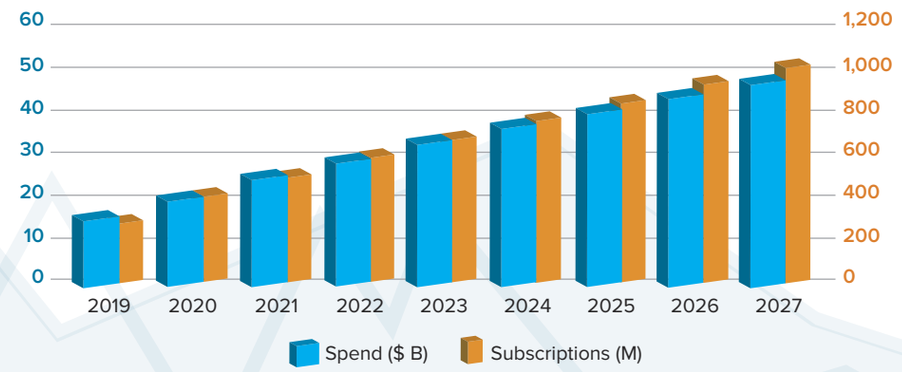
Both video and music streaming markets are set for continued growth in the years ahead, but there are challenges on the horizon. Growth will begin to soften as services start to reach saturation point within their core developed markets.

Various pressures are affecting the landscape. The cost of producing content has increased, there's a need to fill local video quotas, and competition is intensifying as more services enter the content arena. As a result, established players need to explore new revenue streams to shore up their profits. For video subscription services, that means extending beyond the paid-for model and increasingly deploying advert-funded tiers.

Subscription Video on Demand Consumer Spend & Subscriptions



Music Streaming Consumer Spend & Subscriptions



AD-SUPPORTED TIERS ARE A NEW REVENUE GENERATOR

Ad tiers have already been utilised as a new revenue generator by nearly all the global players. Rollout is taking place on a country-by-country basis, with priority given to the most saturated markets. For example, Netflix, with 270 million subscribers worldwide, has rolled out its ad-based service across 12 markets. The streaming giant is now seeing 40% of its new signups coming through ad plans. In its top markets, between 22% and 33% of subscriptions are now on this cheaper tier. This is expected to grow to between 30% and 40% over the next few years.

With all this pre-emptive activity, Futuresource expects video and music streaming growth to continue, albeit at a reduced rate of 8% and 9% CAGR respectively, out to 2027.

SATURATION DOESN'T MEAN NO MONEY

Saturation in the subscription market is a challenge but doesn't necessarily mean less money. While developed markets such as the USA, UK and Germany are nearing subscriber saturation point, growth opportunities still exist, through broadening the audience base and upselling services.

Although growth is slowing, an important factor for collective management organisations (CMOs) is the increasing level of subscriber churn. In a recent Futuresource consumer survey, between 24% and 38% of respondents expected to cancel and restart more often during the next year. The percentage is even higher for younger audiences, at 42% for the 16 to 25 age range. As a result, a wider breadth of content is being viewed by individual audience members.

In developed markets to encourage growth services reposition their various subscriber plans for consumers. This results in not just cheaper ad-based plans, but also strategic market positioning, with more of a distinction between standard and premium plans.

In the music sector, we could be about to see a restructuring of tiers from Spotify. While 2024 has seen improving financials, a modest fee for an ad-tier in saturated markets could help generate higher levels of revenue, to supplement that already seen across monthly active users (MAUs).

A refreshed proposition could help stimulate growth in more saturated markets.

PREMIUM SERVICES STILL DRIVE REVENUE

Premium streaming services are still where the greatest value is for creators, services and consumers. In the video sector, premium subscription tiers are currently two or three times the monthly price of an ad tier, which means the 20% to 30% of subscribers on these premium tiers are helping to generate between 30% and 40% of total revenues. These premium users are spending close to double the amount of time on the service when compared with other subscribers.

PRICE SENSITIVITY IS KEY

Despite the wide choice of subscription tiers that most video streaming services now offer, retention remains a challenge, with consumer price sensitivity being a key factor.

Futuresource research shows that more than 33% of users cancelled a service during the previous year due to it being too expensive and/or they weren't able to afford it.

What's more, over a third of cancelled subscribers would resubscribe if a cheaper tier was available. Promotional offerings, such as 50% off or six months for the price of three, would encourage one in five consumers to resubscribe.

THE HOME COMFORTS OF PHYSICAL MEDIA

While the digital world has provided flexibility and choice at the touch of a button, physical media still holds a unique appeal to many consumers.

Spending on vinyl has been particularly strong, with a CAGR of 26% over the five years to 2023. By 2027 we're going to see it grow annually by 8%, as vinyl heads towards a global spend of US$4.5 billion.

The significant difference in margin that an artist can make from one vinyl sale compared with streaming is also galvanising a growing number of creators and artists to experiment with release windows. They are now giving priority to their physical media, releasing it in advance of putting the album up on streaming services. This is a major departure from what used to be a race to getting as many streams as possible.

THE OUTLOOK FOR CMOS

Although Futuresource projections show single-digit growth across combined video and music streaming during the outlook period, that's only one side of the story. We are forecasting between 2023 to 2027 the absolute growth at US$55 billion, which will see a combined consumer spend that surpasses the $200 billion mark. Of this, video will represent 75%, while increasing levels of ad revenues will also be generated across services.

As the breadth of content and how this is delivered continues to grow, the opportunities for royalty collections will also expand. Despite the slowdown, it's a positive future for those operating within the music and video industry.

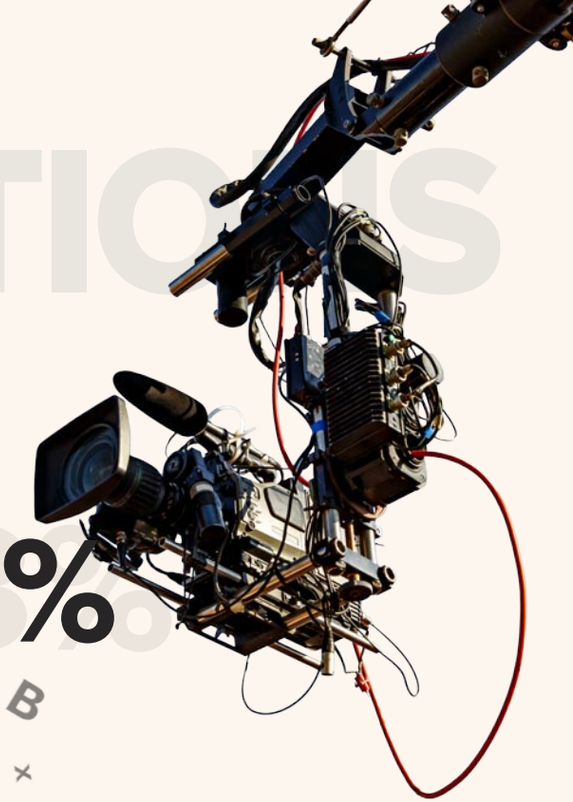
Source data: Market sizing taken from Futuresource tracking across Video and Music sectors. Consumer profile information taken from Futuresource surveys; Music = Audio Tech Lifestyle July'24, Video = Living with Digital Aug'24

GLOBAL COLLECTIONS BY REPERTOIRE

+7.6%

+24.9%

+2.1%



+8.3%

-1.4%

Repertoire MUSIC

€11.7bn

+7.6%

Music collections see steady growth

Global royalties for music creators reached EUR11.7bn, up by +7.6%, helped largely by continued digital growth and buoyant demand in the strongly recovering live sector. Total music collections have rebounded to +31.6% above their level of 2019, before the pandemic. Post-pandemic recovery is now complete across all income streams, with live and public performance increasing +21.8% in 2023 and overtaking 2019 collections for the first time. TV and radio collections continued to decline (down -5.3%) on a steady but stable downward trajectory that is offset by +9.6% digital growth.

Top ten collecting countries (EUR billion)

Country/ Territory	Collections	Growth
UNITED STATES	2.8	+8.1%
FRANCE	1.4	+5.1%
UNITED KINGDOM	1.1	+7.1%
GERMANY	1.0	+8.6%
JAPAN	0.9	-3.0% (+6.8%)*
ITALY	0.5	+22.3%
CANADA	0.4	+5.8%
AUSTRALASIA	0.4	+2.3%
KOREA, REPUBLIC OF	0.3	+9.6%
SPAIN	0.3	-3.0%
GLOBAL TOTAL	**11.7**	**+7.6%**

*in local currency

Music collections by region (EUR million)

Region	Collections	Growth	Share
EUROPE	6,006	+8.3%	51.1%
CANADA/USA	3,189	+7.9%	27.1%
ASIA-PACIFIC	1,784	-0.3%	15.2%
LATIN AMERICA	694	+26.2%	5.9%
AFRICA	74	+3.2%	0.6%
GLOBAL TOTAL	**11,748**	**+7.6%**	**100.0%**
W. EUROPE	5,607	+8.2%	47.7%
E. EUROPE	399	+10.4%	3.4%

Digital continues to drive global growth, but at a slower rate

Income from digital increased by +9.6% to exceed EUR4.53bn. The growth is largely driven by continued organic expansion of music streaming and subscription services, helped by increases in subscription prices and new and renewed deals with global streaming platforms.

Though growth has now slowed after spectacular increases of recent years, digital still accounts for 87.2% of all the growth in collections that CISAC member societies have achieved since 2019.

Digital music, as an income source for millions of creators, is still severely underperforming on a global basis. The streaming model rewards a relatively small share of songwriters and composers, benefiting mostly those with well-established revenue streams from other sources, such as live concerts. Although the total collections sum has seen healthy growth, the number of recipients is substantially growing, most of whom are not able to make a sustainable living from music.

Digital contributed 87.2% of music royalties growth 2019–2023 (EUR million)

Use category	2019	2023	Growth 2019–2023	Contribution
TV & Radio	3,403	3,375	-28%	-1.0%
Digital	2,063	4,527	+2,463%	+87.2%
Live & Background	2,717	3,063	+345%	+12.2%
CD & Video	419	380	-40%	-1.4%
Private Copying	219	278	+59%	+2.1%
Other	104	126	+22%	+0.8%

Digital growth varies by market and region

The major markets are driving digital revenue growth. As a region, USA and Canada remains the largest contributor, rising +12.6% to reach EUR1.3bn. Though flat when converted to euros, Japan saw strong digital growth (up +10.1%) in local currency, helped by streaming subscriber growth and higher rates charged by services. The UK and France rose by +10.2% and +12.9% respectively.

The fastest increasing region for digital, at +28.3%, was Latin America. Mexico contributed more than 50% of the total digital income in the region, growing by one-third. This was driven by the introduction of Disney+, agreements with DSPs such as Deezer, Claro Musica, TikTok and Meta, plus a retroactive payment negotiation with Spotify.

China saw significant digital decreases as licensing negotiations with major music digital services remained unresolved. A new licensing deal is expected by 2024.

With digital accounting for 39% of music collections, many major territories are now seeing digital market shares exceeding or fast approaching 50%.

Digital collection champions (EUR million)

Country/Territory	Digital collections	Total collections	Share
MEXICO	148	213	69.8%
SWEDEN	120	186	64.7%
AUSTRALASIA	217	353	61.4%
CANADA	190	357	53.2%
UNITED KINGDOM	544	1,089	49.9%
KOREA, REPUBLIC OF	123	270	45.4%
JAPAN	371	895	41.5%
FRANCE	581	1,393	41.7%
UNITED STATES	1,201	2,832	42.4%

Digital overtakes broadcast in Canada/USA region

Collections in Canada and USA rose by +7.9% to exceed EUR3bn. For the first time, digital revenue overtook the traditionally dominant broadcast income stream to become the largest sector. Rising by +12.6% to reach EUR1.4bn, digital now accounts for 43.6% of the market.

In both the US and Canada, the predominant driver was the expansion of music streaming platforms. TV and radio declined by -2.8% but remains +5.8% above the 2019 level.

The fastest growing sector was live and background, which rose by +22.7% due to the continued post-pandemic recovery creating higher consumer demand for travel, live concerts and eating out.

Physical media sees highest growth since 2015

Royalties from physical music media reached EUR380m in 2023, following a rise of +6.0%; the highest in eight years. By far the largest contributor to this increase was South Korea, where a near +47% growth rate added more than EUR25m to the global total.

Revenue was generated by regular releases, limited editions and live recordings on CD and vinyl. Japan was stable (but +9.3% in local currency) and remained comfortably the world's largest market at EUR137m and with more than one-third of the world's physical sales. In comparison, UK and USA revenues were each around one-quarter of the Japan figure.

Latin America increases by one-quarter to lead global growth

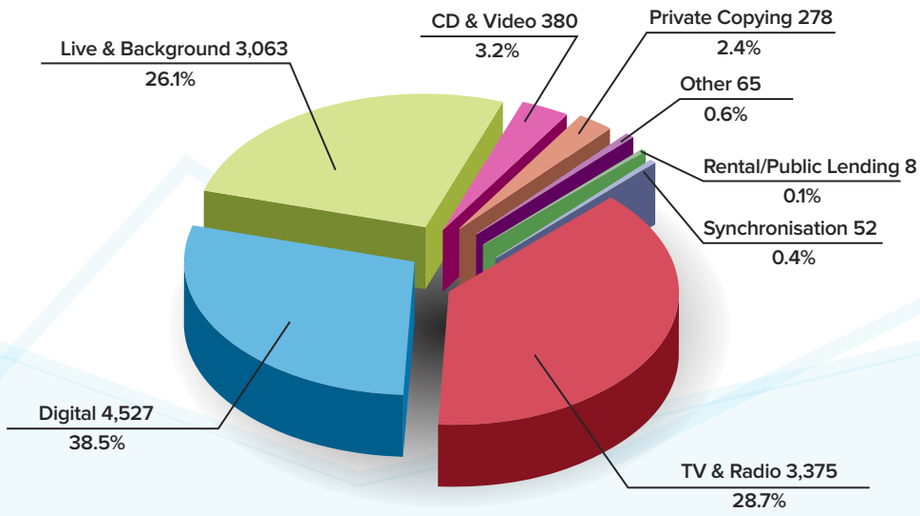
For the second year in succession, Latin America and the Caribbean was the fastest growing region, rising by +26.2% to reach EUR694m. While digital remained the largest sector with a 42.6% share, the primary growth driver was a more than +50% increase in live and background income. Mexico saw a +35.0% rise in total collections.

Pandemic recovery in Chile and Argentina also drove growth of +32.4% and +8.4% (in EUR). TV and radio fell by -0.7% and now makes up less than one-quarter of regional collections, primarily due to a decline in the largest market, Brazil.

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

Use category	Collections	Growth 2023	Growth 2019–2023
Digital	4,527	+9.6%	+119.4%
TV & Radio	3,375	-5.3%	-0.8%
Live & Background	3,063	+21.8%	+12.7%
CD & Video	380	+6.0%	-9.5%
Private Copying	278	+11.9%	+27.1%
Other	65	+50.4%	+24.3%
Synchronisation	52	+44.4%	+70.1%
Rental/Public Lending	8	-13.7%	-46.2%
Publication	0	-99.8%	-99.9%
Reprography	2	-39.9%	0.0%
GRAND TOTAL	**11,748**	**+7.6%**	**+31.6%**

Share of collections by type of use
(EUR million)



Repertoire AUDIOVISUAL

€700m

+8.3%

Collections continue to rise despite drop in broadcast income

Royalty income from the audiovisual repertoire grew by +8.3% to reach a new record high of EUR700m in 2023. Collections have solidly recovered post-pandemic and are now +15.9% above their 2019 level. However, audiovisual collections are severely limited by the small number of countries, mainly in Europe and Latin America, which grant creators an unwaivable right to remuneration.

The 2023 increase came with a +5.9% rise in the dominant broadcast sector. In Mexico, new agreements with TV broadcasters had a strong impact; combined with inflation, this helped to drive growth of more than +160%. Belgium and Italy also saw broadcast royalties rise by +48.7% and +10.3% respectively. In Spain, TV collections fell -27.7%, reflecting a large back payment the previous year.

Top ten collecting countries (EUR million)

Country	Collections	Growth
FRANCE	264	-0.3%
ITALY	64	+30.2%
SWITZERLAND	63	+1.7%
ARGENTINA	45	+40.1%
SPAIN	44	-1.1%
POLAND	42	+28.3%
NETHERLANDS	21	+9.9%
GERMANY	20	+1.3%
UNITED KINGDOM	20	+2.8%
BELGIUM	20	+59.1%
GRAND TOTAL	**700**	**+8.3%**

Growth in Europe

Europe has the lion's share of audiovisual collections, reflecting strong legal frameworks in several countries and consequently robust negotiation positions for societies and AV creators.

The region grew by +5.5% and despite a flat year, France still represents more than two-fifths of the market. In addition to new digital deals, local society SACD also renegotiated TV contracts and signed a new native podcast agreement with Radio France to help protect creators from the worst of the broadcast sector's global decline. A large payment for private copying also led to a +14.2% rise in the country. Reprography income more than doubled.

Elsewhere in Europe, Italy, Belgium and Portugal all saw rises, increasing +30.2%, +59.1% and +15.2% respectively. Following three years of growth, revenues in Eastern Europe rose by +11.5% to +38.9% above the pre-pandemic level. Slovakia fell by one-quarter following disputes with cable operators, poor public broadcaster rates and a slow pandemic recovery. In the Czech Republic, income increased by +9.3% due to improved rates, retrospective settlements and the start of collections from satellite broadcasters for the first time.

Digital royalties grow

Digital collections for audiovisual works have grown steadily from a low base in recent years. Income in this sector rose +18.9% in 2023 but represents just 11.0% of the repertoire and so added less thanEUR13m to its total.

In France, after exceptional increases during the previous two years, collections declined -2.8%.

Negotiations with digital platforms such as Apple TV+, Canal+ Séries, Netflix and ADN animation, led to successful new agreements or renewals. Progress is slower with other services, especially TikTok, which has no licensing agreement for AV works. French society SACD says this is despite the tens of thousands of French audiovisual works appearing on the platform. Digital collections in Italy more than doubled and Spain saw a rise of +41.8% due to a significant back payment.

Latin America grows despite economic challenges

Despite economic pressures, Latin America and the Caribbean saw growth of +48.5%. Audiovisual revenues in the region account for 9.1% of the global total. The region has seen many important improvements in its legislative landscape, helping some societies generate strong collections growth. Argentina, Chile, Colombia, Mexico and Uruguay currently have this right to fair remuneration in place, while in Brazil CISAC is supporting a longstanding campaign for its introduction.

All of the growth was generated in Mexico where broadcast, live and background grew to more than double the country's market share thanks to new licensing deals with TV operators. In Chile, the announcement of a new Netflix contract, facilitated by the recent introduction of the Ricardo Larraín Law for authors' remuneration, provides growth potential for the future.

Audiovisual remuneration right supports growth

The campaign to extend an unwaivable right to remuneration for screenwriters and directors also progressed during the year.

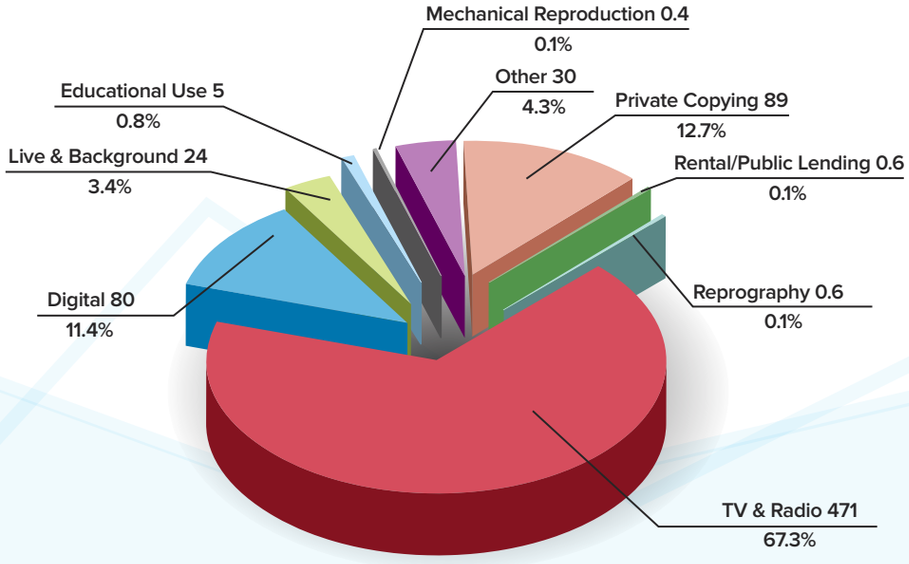
In Korea, following a strong local campaign, a new bill was tabled to amend the national copyright act and recognise the economic right of audiovisual creators for the first time. The bill was subsequently suspended but strong lobbying continues.

In Poland, CISAC is supporting the campaign for the audiovisual right to be extended to on-demand uses of creators' works. At the international level, WIPO delegates have called for in-depth study into audiovisual creators' remuneration. This formal request was scheduled for discussion in future copyright committee sessions.

Breakdown of collections by type of use (EUR million)

Use category	Collections	Growth
TV & Radio	471	+5.9%
Digital	80	+18.9%
Live & Background	24	+21.0%
Educational Use	5	-4.1%
Mechanical Reproduction	0.4	-28.7%
Other	30	+13.5%
Private Copying	89	+8.9%
Rental/Public Lending	0.6	+18.3%
Reprography	0.6	+125.7%
GRAND TOTAL	**700**	**+8.3%**

Share of collections by type of use (EUR million)



Repertoire VISUAL ARTS

€217m

-1.4%

Resale right income grows despite art market pressures

Collections for the visual and graphic arts repertoire declined by -1.4% in 2023 to reach EUR217m. Past and future back payments can distort year-on-year comparisons, but the trend reflects a general decline in the art market in 2023, with reduced sales due to economic and cost-of-living pressures in many countries. Nonetheless, visual arts collections are more than one-quarter higher than the pre-pandemic level of 2019.

The largest income source for visual arts collections is reprography, which makes up more than one-quarter of collections. This revenue derives from the reproduction of graphic works through mechanical or electrical means and is usually paid by the device providers. Reprography income rose by +3.3% in 2023 and is more than one-third higher than in 2019.

Most visual arts income is generated in Europe, but every region saw declines during the year. Austria saw a near halving of revenues due to an exceptional five-year back payment made for private copying the previous year. France, the largest collecting country, registered a -5.2% decline for domestic collections. Despite strong collections in resale right and digital, private copying income fell in line with lower sales of mobile devices. The UK's sharp 2023 rise is due to adjusted timing of contracts.

Top ten collecting countries
(EUR million)

Country	Collections	Growth
FRANCE	47	-5.2%
GERMANY	38	-6.5%
UNITED KINGDOM	29	+23.5%
SWEDEN	17	-3.2%
NETHERLANDS	14	-5.1%
ITALY	12	+11.5%
SPAIN	9	+45.5%
DENMARK	9	+6.8%
UNITED STATES	7	-7.2%
FINLAND	7	+21.9%
GRAND TOTAL	**217**	**-1.4%**

Visual arts collections by region
(EUR million)

Region	Collections	Growth
EUROPE	202	-0.9%
CANADA/USA	7	-11.8%
ASIA-PACIFIC	7	-3.6%
LATIN AMERICA	0.4	-8.2%
AFRICA	0.1	+20.1%
GRAND TOTAL	**217**	**-1.4%**

Resale right collections up +4.9%

The artists resale right provides a small percentage payment to the original artist when their work is resold at auction. Resale right collections increased by +4.9% in 2023. The right has been adopted into law in more than 90 countries and is a vital source of income for artists, providing one-quarter of visual

arts collections. Total global collections from the resale right have risen +13.3% since 2019.

The largest collecting country for the resale right is the UK, where income grew +4.9% to reach EUR16m. The right has enabled local society DACS to distribute more than GBP125m to over 6,000 artists and estates over the last two decades. In 2023, 228 UK artists received their first ever resale right payment from this source. France and Italy increased resale right income by +4.2% and +8.5% respectively. Germany also grew by +25.9%.

CISAC is guiding many governments looking to introduce the resale right, with Korea and New Zealand joining the list of adopting countries in 2023.

Asia-Pacific declines -3.6%

Visual arts collections in Asia-Pacific fell by -3.6% despite strong performance in Australia, where collections increased by +43.3% to exceed EUR3m for the first time. Two-thirds of the Australian total came from reproduction, which grew by more than half.

Korea also increased by +4.0% due to a number of large government educational projects that increased the use of visual artists' work in school books and lecture materials from kindergartens to universities. In China, however, digital income and reprography revenue fell sharply to impact the new regional total.

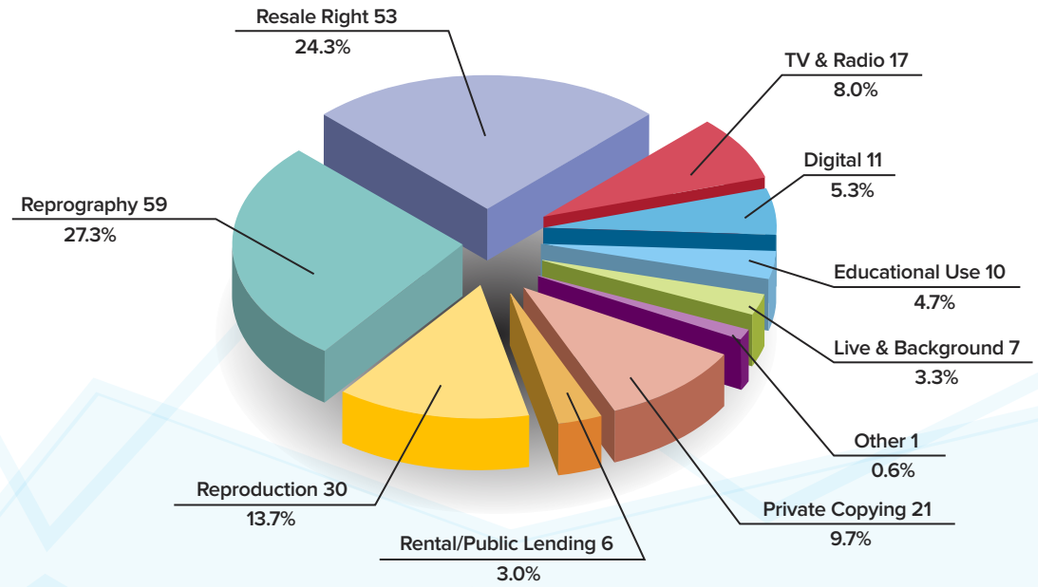
Breakdown of collections by type of use
(EUR million)

Use category	Collections	Growth
TV & Radio	17	-4.2%
Digital	11	-23.1%
Live & Background	7	-1.0%
Educational Use	10	+22.0%
Other	1	+18.0%
Private Copying	21	-29.2%
Rental/Public Lending	6	+27.4%
Reproduction	30	+7.2%
Reprography	59	+3.3%
Resale Right	53	+4.9%
GRAND TOTAL	**217**	**-1.4%**

Resale Right: top ten collecting countries
(EUR million)

Country	Collections	Growth	Share
UNITED KINGDOM	16	+4.9%	30.3%
FRANCE	13	+4.2%	25.1%
ITALY	9	+8.5%	16.3%
GERMANY	5	+25.9%	9.1%
SWEDEN	2	+2.8%	3.9%
BELGIUM	1	-7.8%	2.8%
CZECH REPUBLIC	1	+16.1%	2.7%
DENMARK	1	+50.1%	2.4%
AUSTRIA	1	+14.8%	2.2%
AUSTRALIA	1	+27.9%	1.9%
GRAND TOTAL	**53**	**+4.9%**	

Share of collections by type of use
(EUR million)



Repertoire DRAMA €210m

+24.9%

Drama is the fastest growing repertoire

For the second year in succession, income from the use of dramatic works grew faster than any other repertoire, increasing +24.9% to reach EUR210m. The sector has rebounded to +13.4% above the pre-pandemic level. Live and background collections make up 87.1% of all dramatic income and grew by +28.1%.

Italy fully recovers from the pandemic

Dramatic collections in Italy make up one-third of the repertoire total and in 2023, grew by +26.6%. The largest increase was in the live and background sector, which increased by one-third with local society SIAE reporting the highest theatre income on record. More than 90,000 shows during the year brought Italian audiences of 15 million people back to these events.

Elsewhere in the country, a significant back payment for private copying increased this revenue stream by +64.0%, while income from rental and lending near doubled. Italy had faced some of the most severe lockdown restrictions with theatre performances especially affected. 2023 marked the country's full recovery with the total now +4.2% above the pre-pandemic level.

Broadcast collections return to growth

Following a -2.1% decrease in 2022, dramatic revenues from TV and radio recovered to grow +5.9% and reach EUR19.9m. In Switzerland, back payments from public broadcasters RTS and RSI increased the EUR3.5m national total by +2.3%. Broadcast revenues in Italy saw a +4.2% upturn. Smaller collecting countries such as Luxemburg, Poland and Uruguay also saw increases of +9.1%, +8.9% and +15.7% respectively.

France sees record collections

France makes up 31.7% of global collections and revenue increased by +17.2% during the year. The 2023 total reached EUR66.8m, the highest level on record, with growth evident both in Paris (+19.1%) and in the provinces (+16.3%). Local society SACD also observed a +9.0% rise in live performance with more than 200,000 events across the country.

Top five collecting countries
(EUR million)

Country	Collections	Growth
FRANCE	67	+17.2%
ITALY	64	+26.6%
ARGENTINA	30	+78.6%
SWITZERLAND	12	-3.1%
SPAIN	11	+10.0%
GRAND TOTAL	**210**	**+24.9%**

Breakdown of collections by type of use
(EUR million)

Use category	Collections	Growth
TV & Radio	20	+5.9%
Digital	0.05	-73.2%
Live & Background	184	+28.1%
Other	1	+28.2%
Private Copying	5	+2.4%
Rental/Public Lending	1	+135.8%
Reproduction	0.1	-
GRAND TOTAL	**210**	**+24.9%**

Repertoire LITERATURE

€215m

+2.1%

Literary sector continues to grow

Literary collections rose +2.1% to a record high of EUR215m during 2023. This total was the highest on record and +9.3% above the 2019 level. The top five collecting countries are Australia, UK, Finland, the Netherlands and Switzerland. Together they accounted for three-quarters of the repertoire's total.

The UK saw the highest growth in this sector, rising +8.2% to reach EUR36.5m. The increase was supported by the "AuthorSHARE" initiative, a voluntary scheme in which retailers in the fast-growing second-hand book market provide a resale royalty to authors.

Reprography leads income sources

Reprography still makes up three-quarters of royalties for the literary repertoire. Rental and public lending contributed an additional +11.4% of the total. Following a +34.1% rise the previous year, income from rental and public lending fell by -8.8% in 2023 to reach EUR24.6m. The largest fall was in Italy, where royalties fell by -40.0% after a five-fold increase in 2022.

Digital income from e-lending rose by +6.5% to reach EUR3m. Only the Czech Republic, Latvia and the Netherlands are making collections from this source.

Live and background collections remain below COVID level

Authors' income from the public performance of literary works grew by +17.7% but remains below the pre-pandemic level. Most of these collections are generated in Italy and an increase of almost one-quarter helped bring the global total to EUR1.6m.

Australia remains the largest collecting country despite challenges

Australia saw a -10.7% decline, exacerbated by currency conversion, but remains comfortably the largest territory for the literary repertoire. Collections in Australia come exclusively from reprography and this sector received a significant back payment in 2022 following a copyright tribunal agreement with universities that covered a seven-year period.

Smaller revenue sources increase

Literary revenues from private copying increased nearly threefold in 2023 to register the largest rise since 2016 (primarily due to a change in reporting from France). The majority of collections were generated in France, the Netherlands and

Italy, which together made up 85% of the EUR11.8m global collection total.

Revenues from the use of literature in TV and radio increased by +41.9% to reach a record high of EUR4.6m. Slovenia grew the fastest, following a back payment from national broadcaster RTV. Other Central European countries such as Hungary, Slovakia and the Czech Republic also saw growth, rising by +7.9%, +11.4% and +9.5% respectively.

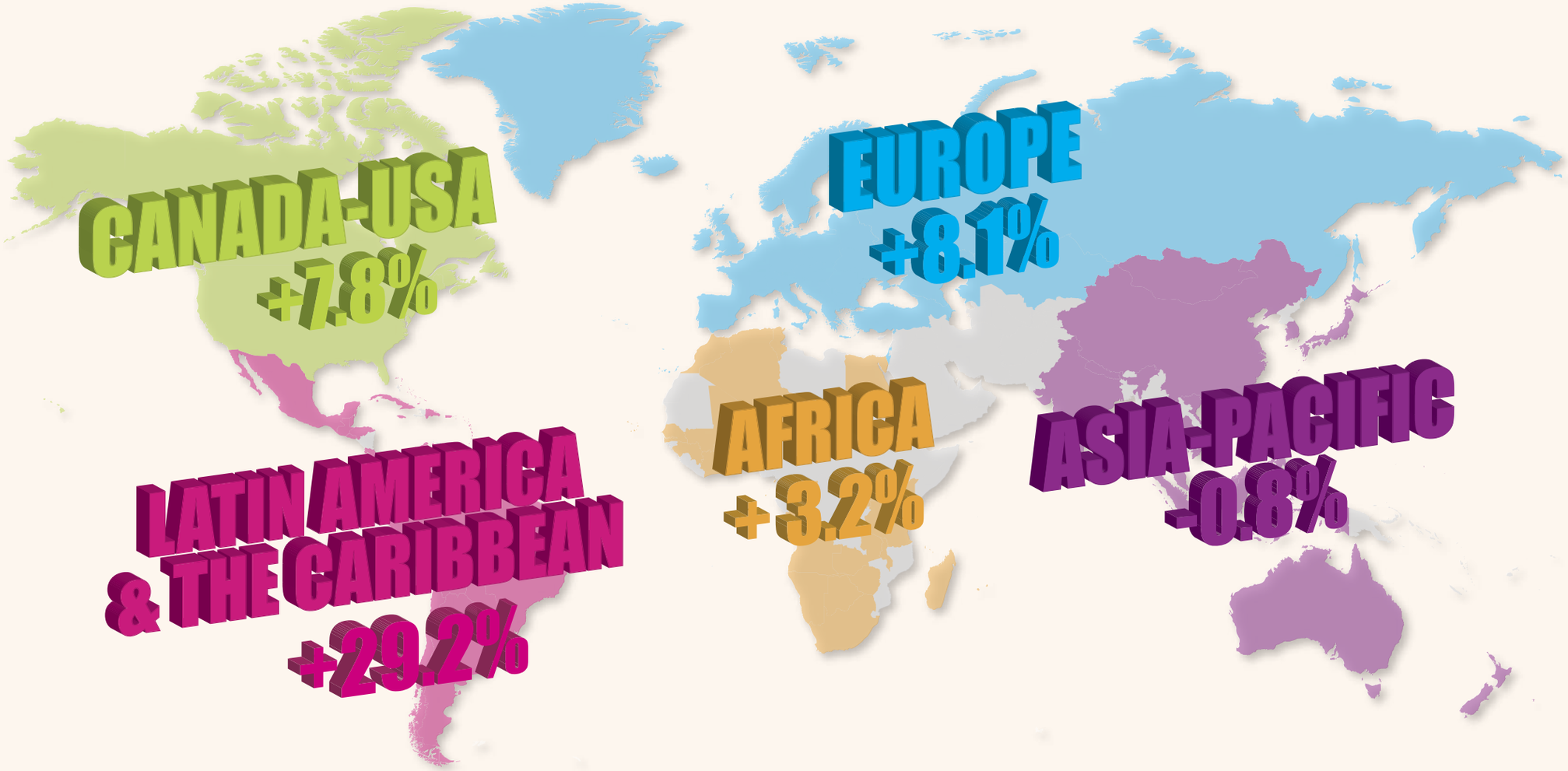
Top five collecting countries
(EUR million)

Country	Collections	Growth
AUSTRALIA	70	-10.7%
UNITED KINGDOM	36	+8.2%
FINLAND	20	+0.7%
NETHERLANDS	20	+0.5%
SWITZERLAND	19	+4.0%
GRAND TOTAL	**215**	**+2.1%**

Breakdown of collections by type of use
(EUR million)

Use category	Collections	Growth
TV & Radio	5	+41.9%
Digital	3	+6.5%
Live & Background	2	+17.7%
Educational Use	4	-5.0%
Mechanical Reproduction	0.043	-97.1%
Other	2	+36.3%
Private Copying	12	+183.4%
Rental/Public Lending	24	-8.8%
Reproduction	1	-
Reprography	162	-1.8%
GRAND TOTAL	**215**	**+2.1%**

COLLECTIONS BY REGION



Region EUROPE

€7.2 bn

+8.1%

Live and public performance rise sharply to complete recovery

Creators' royalty collections in Europe increased by +8.1% in 2023 to reach EUR7.2bn. Building upon the previous year's exceptional pandemic recovery growth rate, collections in the region are now +25.6% above the 2019 level. Europe contributed 54.7% of the global total. The most important drivers of growth were the buoyant live sector and steady digital growth.

Three-quarters of the region's collections were generated in the six largest countries, with France growing +4.7% to contribute EUR1.8bn alone. The UK saw the strongest post-pandemic recovery with collections now +42.9% above their 2019 level. In Germany, a +7.8% increase allowed the country to exceed EUR1bn for the first time. Central and Eastern Europe increased strongly by +10.8%, thanks in particular to recovery in live and background (up +22.2%) and broadcast royalties (up +5.5%).

Music remains the largest repertoire, growing +8.3% to reach a total of more than one-quarter above 2019. Royalties for dramatic works grew the fastest, however, rising +18.8%. This sector has been the slowest to recover over recent years.

Collections by repertoire, Europe (EUR million)

Repertoire	Collections	Growth
Music	6,006	+8.3%
Audiovisual	634	+5.5%
Literary	136	+10.4%
Drama	178	+18.8%
Visual Arts	202	-0.9%
GRAND TOTAL	**7,156**	**+8.1%**

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

Repertoire	Collections	Growth
Music	399	+10.4%
Audiovisual	70	+11.5%
Literary	8	+11.8%
Drama	16	+14.8%
Visual Arts	4	+17.2%
GRAND TOTAL	**497**	**+10.8%**

Live and background back to pre-pandemic levels in 2023

With a resurgence in particular of live concerts and festivals, live and background collections were the largest single source of revenue for creators in Europe. Growing +19.6% to reach EUR2.2bn, the total is +11.0% above its 2019 level and represents 30.8% of the market. The five largest countries contributed four-fifths of this growth, but the majority also saw increases.

The live sector is leading growth, with local festivals especially returning to full activity. Germany saw local festivals and large stadium gigs increase concert revenues by around +27.8%. In Switzerland, the rescheduling of tours that were postponed in 2021 and 2022 helped lift revenues by one-quarter. Italy and the Netherlands finally saw a full recovery from the pandemic, with musical shows and large concerts driving increases of +29.9% and +23.5% respectively.

In Turkey, local society MESAM, now in partnership with MSG, saw a +49% rise in live and background collections, helped by economic recovery and the restructuring of joint-licensing efforts with regional authorities. Similar trends in Latvia combined with the return of a national song and dance festival to generate a +47.4% rise.

Digital now double the pre-pandemic level

Collections from digital in Europe grew by +11.5% in 2023 to EUR2.1bn—this is more than twice the 2019 level of digital collections. Across the region, long-sought price increases by digital platforms helped lift total royalties, combined with steady but slower growth in subscriber numbers.

Portugal and Italy both saw growth of more than +50%. New agreements in Spain with Disney, Meta and Amazon Digital drove growth of +6.5%, while collections in Slovakia rose one-fifth following a literary digitisation project with the Slovak national library. Sweden again had an exceptionally high digital market share at 59.4%.

Despite continued increases, societies in Europe continue to highlight the disconnect between the picture of overall digital growth and the negligible returns from streaming royalties for the vast majority of their member creators.

Digital takes a growing share of royalties
(EUR million)

Country	Total Collections	Digital Collections	Digital Share
FRANCE	1,777	636	35.8%
UNITED KINGDOM	1,174	544	46.3%
GERMANY	1,039	310	29.8%
ITALY	698	100	14.3%
SPAIN	330	55	16.7%
GRAND TOTAL	**7,156**	**2,065**	**28.9%**

Broadcast revenues resilient in decline

TV and radio collections have traditionally been the mainstay of collections in Europe, but in 2023 these were overtaken as Europe's largest sector for the first time, following a decrease of -4.5%. Broadcast made up 28.5% of the market but is now below both digital and live and background at EUR2.1bn and EUR2.2bn respectively. Factors driving the trend include changing consumption patterns and declines in TV advertising budgets.

The largest effect was felt in France, which fell by -7.0%, and Spain, which dropped by -29.9%. Germany, Italy and the UK all saw decreases with these top five collecting countries alone removing EUR119m from the regional total.

Private copying remains an important income stream for creators in Europe, rising +9.1% in 2023 to EUR390m.

Growth in all repertoires except visual arts

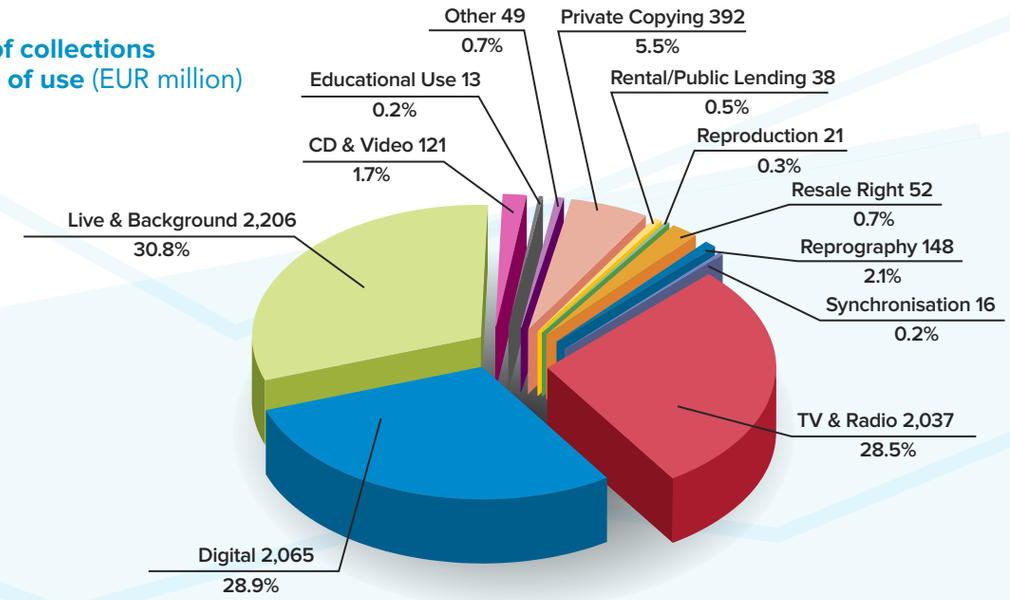
Collections for visual artists fell -0.9% and were the only repertoire sector not to increase in 2023 (but +17.2% in Eastern Europe). The main driver for this were the exceptional back payments made in many countries the previous year. This led to decreases of collections in Germany, France and Belgium. Only Spain saw meaningful growth, where a +45.5% increase was driven by strong recovery in reproduction and reprography plus a back payment for private copying.

Europe's dramatic repertoire was particularly strong with double-digit increases in almost every country as pandemic recovery was finally achieved. The year's total is +18.8% ahead of the previous period. Audiovisual collections rose +5.5% to EUR634m.

Breakdown of collections by type of use (EUR million)

Use category	Collections	Growth
TV & Radio	2,037	-4.5%
Digital	2,065	+11.5%
Live & Background	2,206	+19.6%
CD & Video	121	+1.5%
Educational Use	13	+10.3%
Mechanical Reproduction	0	-79.2%
Other	49	+16.3%
Private Copying	392	+10.0%
Rental/Public Lending	38	-1.9%
Reproduction	21	+20.9%
Reprography	148	+6.3%
Resale Right	52	+5.4%
Synchronisation	16	-5.0%
GRAND TOTAL	**7,156**	**+8.1%**

Share of collections by type of use (EUR million)



Region CANADA/USA

€3.2bn

+7.8%

Digital collections growth accelerates post-pandemic

The North American region, consisting of Canada and the USA, saw collections grow +7.8% to EUR3.2bn in 2023. Royalties are up +44% on 2019, confirming the region as one of the world's most dynamic rights markets.

Growth in the region was driven by a number of factors: the continued progress of digital collections, up +12.6% year-on-year to EUR1.39bn; the strong post-pandemic recovery of live & public performance, up +22.7% over 2022 to EUR463.9m; and the relative resilience of TV & radio broadcast due to a strong advertising market, with collections down -2.8% year-on-year to EUR1.26bn.

Collections by repertoire
(EUR million)

Repertoires	Collections	Growth
Music	3,189	+7.9%
Audiovisual	0.04	-6.1%
Visual Arts	7.5	-11.8%
GRAND TOTAL	**3,196**	**+7.8%**

Digital powers growth

Digital collections are by a small margin the largest source of revenue in North America, ahead of TV and radio. These have grown by +138% since 2019, with an acceleration during the years 2020–2022, when digital collections doubled and passed the one billion euros mark for the first time. Digital growth has been driven largely by the boom in streaming and subscription, as in other regions.

The transition has also been driven by the work of performance rights societies in the United States and Canada to license a wider range of new digital outlets, from subscription video on demand services to gaming platforms and music apps.

US society ASCAP, which had a record year in collections in 2023, experienced a +21% rise in audio streaming revenue. Similarly, Canada's SOCAN achieved record collections in 2023 with a +13% rise in revenue from digital sources.

In the region, music repertoire accounts for 99.76% of total collections, with the remainder coming from visual arts. US collections made up 88.8% of the total, with 11.2% coming from Canada.

At EUR357.1m, collections in Canada were up +6% in 2023 and now stand 39% higher than before the pandemic in 2019. Digital has predominantly powered this growth, rising +5% to EUR189.6m in 2023 to nearly double (+99%) the level of 2019. Digital has been the largest income stream for creators in Canada since 2021.

Visual arts declines -11%

Visual arts collection reached EUR7.47m in 2023, down -11.8% compared to the year prior, but up +3.8% from 2019. Visual arts revenues come mainly from the reproduction right. Over 97% of the rights were generated in the United States. Canada's visual arts royalties are very small.

Neither the US nor Canada collects audiovisual rights through the collective management organisations' network, as residuals from the use of AV content are paid directly by the studios to writers' and directors' unions—WGA and DGA, respectively.

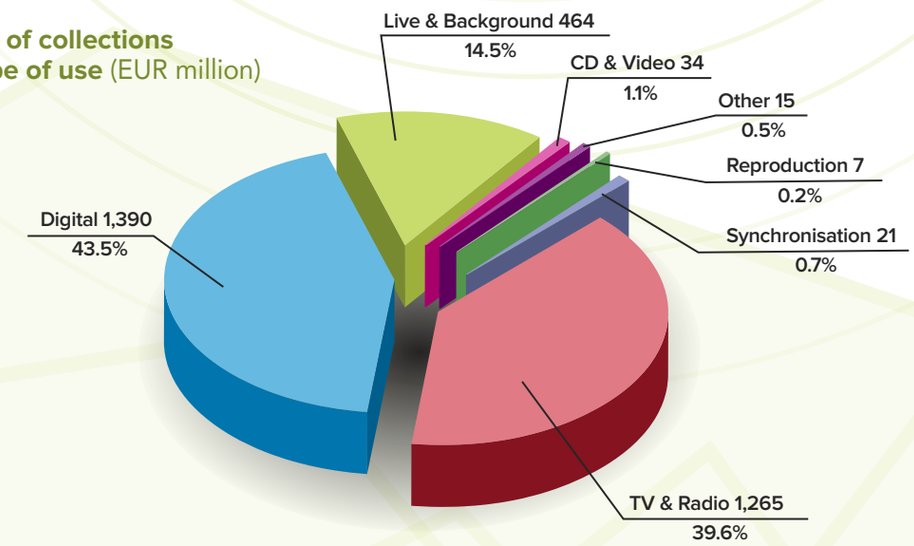
This report is based on data supplied by the main PROs in the US and Canada. It does include figures from BMI, which turned to a for-profit company in 2023 and went under new ownership by investment firm New Mountain Capital in 2024. BMI's status moved from CISAC member to Client RME.

This analysis does not include data from the MLC—established in 2020 to administer the blanket licence on mechanical rights for digital services created by the Music Modernization Act—and which is not a member of CISAC. In 2023, the MLC processed USD980m and distributed roughly USD778m to its members.

Breakdown of collections by type of use
(EUR million)

Use category	Collections	Growth
TV & Radio	1,265	-2.8%
Digital	1,390	+12.6%
Live & Background	464	+22.7%
CD & Video	34	-10.1%
Other	15	+1520.0%
Reproduction	7	-7.1%
Reprography	0.1	-16.9%
Resale Right	0.1	-86.7%
Synchronisation	21	+675.5%
GRAND TOTAL	**3,196**	**+7.8%**

Share of collections by type of use (EUR million)



Region ASIA-PACIFIC

€1.9bn

-0.8%

Live and physical media help provide stability

Collections in Asia-Pacific decreased slightly by -0.8% in 2023 to EUR1.9bn. The fall is heavily impacted by exchange rate fluctuation in the leading markets. Discarding this in Japan alone, the region's collections would have increased +7.2% in local currency.

Collections in the Asia-Pacific region are now +19.0% above the 2019 level. Live and background has recovered from the pandemic more slowly in Asia-Pacific than in other regions, but in 2023 rebounded strongly, up by +18.0%, to offset declines in other royalty streams.

There was also an exceptional surge in demand for physical media, led by the buoyant K-pop business in Korea. Asia-Pacific still has the highest share of digital royalties, while societies in the region face challenges to obtain fair value for creators from TV and radio broadcasters. The Asia-Pacific region has seen important progress in the visual arts repertoire, with Korea and New Zealand both adopting the resale right in 2023, potentially boosting future collections.

Top three collecting countries/territories
(EUR million)

Country/ Territory	Collections	Growth
JAPAN	895	-3.0% (+ 6.8%)*
AUSTRALASIA	427	+0.1% (+7.5%)*
KOREA, REPUBLIC OF	279	+9.3% (+11.7%)*

*in local currency

Collections by repertoire
(EUR million)

Repertoire	Collections	Growth
Music	1,784	-0.3%
Audiovisual	0.2	-23.1%
Literary	75	-10.1%
Drama	-	-
Visual Arts	7	-3.6%
GRAND TOTAL	**1,867**	**-0.8%**

Digital collections powered by Japan and Korea

Digital remains comfortably the largest income source in Asia-Pacific (45.7% of total collections), with the Philippines and Korea seeing growth at +58.4% and +4.8% respectively. All other countries saw a drop in the sector, reflecting licensing and growth barriers in some markets including China and India, and flattening growth of streaming subscriptions in some markets. Total digital collections across the region fell by -3.8% in 2023, the decline affected by exchange rate fluctuations.

Creators in Asia-Pacific's markets are highly dependent on digital as an income source. In some smaller territories such as Indonesia, Vietnam and the Philippines, digital accounts for more than 80% of total collections. The Philippines' exceptional growth was driven by new subscriptions, especially under a new licensing deal with market leader Netflix.

Value challenge in India

Despite years of strong streaming growth, several Asia-Pacific markets such as **India**, are hampered by a low percentage of internet users taking up premium streaming subscriptions. India's streaming subscription growth has been impressive, with Spotify at 70 million users and video subscription channels, led by Disney, Netflix and Amazon, rapidly expanding. However, after several years of strong growth, digital collections in 2023 were flat in local currency and declined by -6.2% in euros. One key factor is that the vast majority of the country's huge internet population are using free or low-value advertising-supported platforms which deliver low returns to creators. Several of India's digital services are focused on transitioning to a paid model.

Japan, the region's largest collecting country, saw digital royalties remain flat in euros but up +10.1% in national currency, with rising subscriber numbers in both music and video.

Collections in **China** declined -8.1% in 2023 (flat in constant rate), with a sharp fall in digital caused by the continued refusal of two major platforms, Tencent and NetEase, to agree on licensing terms.

Creators' digital lifeline in Asia-Pacific
(EUR million)

Country/ Territory	Digital	Digital Share
JAPAN	371	41.4%
AUSTRALASIA	217	50.8%
KOREA, REPUBLIC OF	123	44.0%
INDIA	42	74.2%
HONG KONG	30	68.7%
CHINA	14	28.4%
PHILIPPINES	12	80.3%
TAIWAN, CHINESE TAIPEI	11	48.7%
VIETNAM	10	84.3%
THAILAND	7	66.2%

Live concerts boost Australasia

Revenues in **Australasia** were flat in 2023 but remain +23.7% above the 2019 total. More than half of the market is digital, which declined by -2.6% (+4.6% in constant rate) due largely to slower organic subscription streaming growth and cost of living pressures. Broadcast collections declined -9.6%, due primarily to lower TV advertising revenues.

Collections from live and background sources increased sharply, rising by +61.5% to exceed EUR50m and compensate for decreases elsewhere. There was strong growth in retail, hotels, restaurants and fitness centres, in addition to the positive impact of large tours by major artists such as Pink and Taylor Swift.

Promoting the future of crisis-hit live music

Despite the growth of big-stadium activity, at the grassroots level, Australia is currently experiencing the biggest live music crisis in a generation. In the four years since the pandemic, there has been a loss of 1,300 live music venues across the country—a decrease of 25% of all licensed venues.

Crowds at nightclubs have almost halved. APRA AMCOS is calling for tax benefits to support the growth of live music. Based on research by Oxford Economics, a combined tax offset for existing live music venues and those not currently hosting live music, would boost the incomes of musicians and artists by AUD205m per year with an additional 203,200 gigs, supporting the creation of 7,400 direct and indirect jobs across entertainment, hospitality and tourism.

The Australian government has announced AUD8.6m in 2024–25 for Revive Live, which aims to bolster Australian live music venues and festivals showcasing local talent, while also enhancing accessibility and inclusion at live music performances.

Korea sees both digital and physical media growth

Collections in **Korea** grew by +9.3% to reach EUR279m, more than two-thirds above the 2019 level. The continued growth of video streaming services and improved contract terms with major operators helped to drive a +4.8% rise in digital, whilst strong performance in concert tours and cinema grew the live and background sector by +18.1%.

By far, the largest growth in Korea was generated by the sale of physical media, up +47.1%. This was driven by the K-Pop "Idol" phenomena, with fans hunting out limited edition releases and concert albums. Collections from physical media are now larger than the broadcast, live and background sectors combined.

Strong live and background recovery in smaller territories

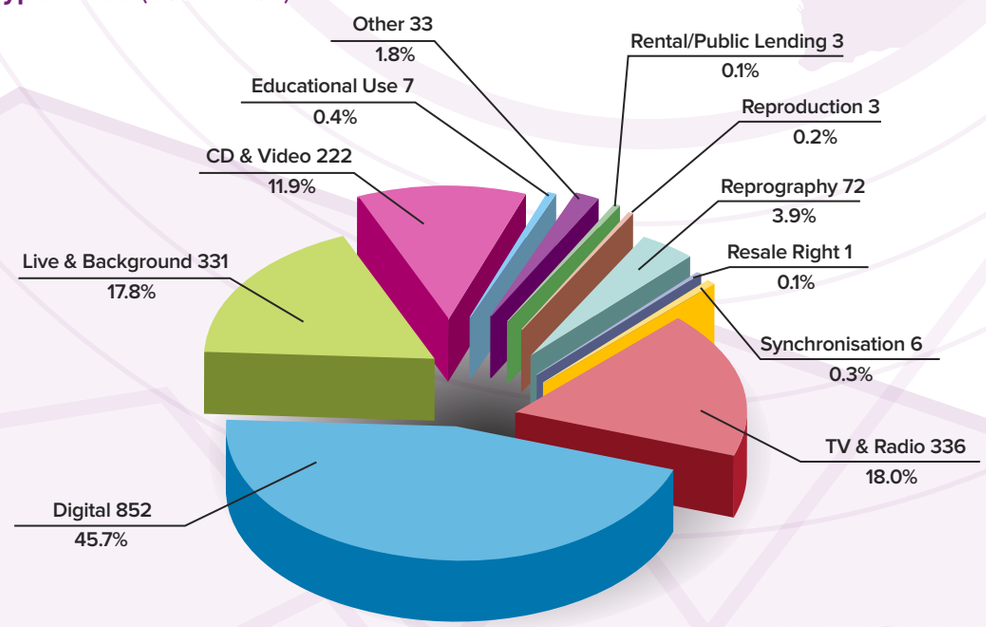
Income from the use of music in live and background applications grew by 18.0%, with every country experiencing growth. Collections in this category are +0.8% above pre-pandemic levels.

The **Philippines** grew by 62.1%, assisted by local society FILSCAP's successful litigation against a major national restaurant chain. Revenues in **Thailand** more than doubled as the country's entertainment centres reopened fully and in **China**, the reintroduction of large concert events drove a +30.5% increase in live performance revenue.

Breakdown of collections by type of use
(EUR million)

Use category	Collections	Growth
TV & Radio	336	-11.3%
Digital	852	-3.8%
Live & Background	331	+18.0%
CD & Video	222	+12.1%
Educational Use	7	-13.6%
Other	33	+14.3%
Private Copying	0	-26.6%
Rental/Public Lending	3	-29.7%
Reproduction	3	+23.5%
Reprography	72	-12.9%
Resale Right	1	+27.9%
Synchronisation	6	-5.6%
GRAND TOTAL	**1,867**	**-0.8%**

Share of collections by type of use (EUR million)



Region

LATIN AMERICA & THE CARIBBEAN

€791m

+29.2%

Latin America is the world's fastest growing region

For the second year running, Latin America and the Caribbean saw the world's highest growth rate in collections at +29.2%. The region has seen the fastest cumulative growth over five years and royalties are now almost +55% above the pre-COVID level at EUR791m.

Growth was driven by strong increases in live and public performance, coupled with resilient TV and radio collections (up +8.2%). Broadcast's market share in the region, almost at 60% a decade ago, has steadily declined over the years and now stands at 27.8%.

There was steady growth in the audiovisual repertoire where, despite an exceptional near +40% rise in 2022, collections' growth remained positive in 2023 at +48.5%. Audiovisual royalties are supported by the strong legislative environment in several countries in the region.

Top three collecting countries (EUR million)

Country	Collections	Growth
MEXICO	226	+39.0%
BRAZIL	224	+23.4%
ARGENTINA	177	+23.8%

Collections by repertoire (EUR million)

Repertoire	Collections	Growth
Music	694	+26.2%
Audiovisual	64	+48.5%
Literary	0.002	+198.5%
Drama	32	+75.1%
Visual Arts	0.4	-8.2%
GRAND TOTAL	**791**	**+29.2%**

Digital collections up +29%

Collections from the digital use of creators' works reached EUR299m in 2023, up by +29%. This was more than double the growth rates seen in Europe or Canada/USA and triple the combined rest-of-world figure. Digital revenues in Latin America are now 3.5 times the pre-pandemic 2019 regional total.

More than half of the region's digital collections came from **Mexico**, which grew by one-third in 2023. In addition to the inflationary effect on subscription prices, local society SACM also signed a new contract with Disney+, finalised a renegotiation with Spotify that includes a retroactive payment, and strengthened relationships with other DSPs such as Deezer, Claro Musica, TikTok and Meta.

In **Brazil**, increased prices and subscription rates helped drive a +25.0% rise in digital revenues to more than EUR55m. Chile, Costa Rica and the Dominican Republic all grew by more than +50% whilst Panama, Paraguay and Trinidad and Tobago more than doubled.

Live and background recovery now complete

Collections from live and background use across the region finally recovered from the pandemic and are up +32.7% on the pre-COVID level of 2019. The EUR257m total now represents 32.6% of the regional total.

Of the larger markets, Brazil grew the most (up +77%), driven by the return of carnivals and large concerts. Due to the cost of staging these events, many bands took the opportunity to extend their tours into neighbouring countries, bolstering collections there. Argentina and Peru increased live and background revenues by around one-third. Colombia grew by one-fifth and Venezuela more than doubled. Panama also saw the large-scale return of hotel and ocean cruise business that led to the country's live and background sector growing three-fold.

Broadcast royalties hold its ground

Revenues from TV and radio rose +8.2% thanks mainly to a large +46% increase in Mexico, which compensated for declines in most other markets. Broadcast growth in Mexico is driven by the renewal of contracts and granting of new licences to television channels, including TELEVISA, one of the largest in the country.

Most of the broadcast royalties growth comes from the audiovisual sector in Mexico. Brazil and Argentina saw +0.7% and +8.3% increases respectively. As in other territories, the decline of TV advertising, combined with a gradual shift to subscription video on demand (SVOD), continues to drive an overall gently declining trend in the traditional broadcast sector.

Smaller sources of income grow

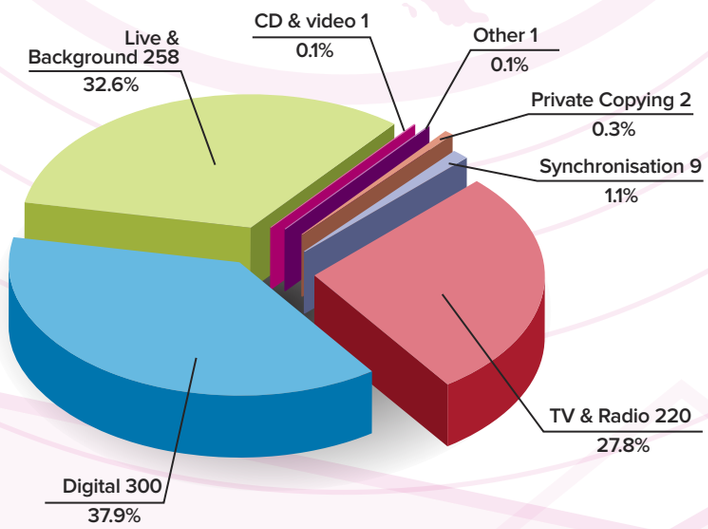
Many smaller countries also saw strong growth across the region. In **Costa Rica**, a historic number of concerts during the year and strong digital performance negated the weakening exchange rate to deliver +63.0% growth. **Jamaica** held its first full carnival since the pandemic, which began a trend for live events. This, and improved negotiated rates with hotels, led to a +33.0% rise in revenues.

Smaller sources of income increased, including private copying by +43.6% in **Paraguay**, adding EUR2.3m to the regional total. Paraguay remains the only country to collect for private copying in Latin America. For the third successive year, the artists resale right also grew in **Uruguay**, rising by +27.2% to exceed EUR50k.

Breakdown of collections by type of use (EUR million)

Use category	Collections	Growth
TV & Radio	220	+8.2%
Digital	300	+29.0%
Live & Background	258	+57.9%
CD & Video	1	-15.8%
Educational Use	0	-28.7%
Other	1	+560.2%
Private Copying	2	+43.5%
Reproduction	0	-3.3%
Resale Right	0	+27.2%
Synchronisation	9	-12.5%
GRAND TOTAL	**791**	**+29.2%**

Share of collections by type of use (EUR million)



Region AFRICA

€81m

+3.2%

African collections grow +3.2% as live and background rebounds strongly

Collections for creators in Africa increased +3.2% to reach EUR81m in 2023. In South Africa, which makes up more than half of the region, income fell by -2.5% in euros, but the country saw a +15.5% increase in local currency. Morocco and Côte d'Ivoire saw increases of +24.1% and +12.2% to make up one-fifth of the region. Of the larger countries, Malawi rose the fastest, with collections growing by two-thirds to reach EUR2.9m.

Broadcast royalties challenging

More than one-third of revenues in the region come from TV and radio, despite this sector falling by -11.0%. In South Africa, a decline of -12.2% was driven by reduced viewer numbers, whilst Zimbabwe and Algeria saw declines in broadcast income of -21.8% and -7.9%. Outside South Africa, royalties from broadcasters are lower than those from live and public performance, a reflection of the difficulties in collecting TV and radio income in the region.

Live and background income now one-quarter above pre-pandemic level

Live and background collections make up 23.9% of African revenues and grew by +13.6% during the year to reach EUR19.4m. This was driven by the strong return of post-pandemic live events and an increased focus on licensing.

In South Africa, the number of live events was bolstered by the local trade organisation's increased enforcement of music licences that drove a seven-fold increase in revenue from this sector. Background use of music also grew as bars and restaurants returned. Together, live and background made up 18% of the country total. Collections in Malawi grew by +61.8% while Mauritius and Namibia rose by +88.7% and +29.5% respectively. A new contract with MAJESTIC movie theatres in Côte d'Ivoire helped drive collections from this sector to a EUR4.7m record high.

Digital growth supported by cooperative agreements

Digital revenues increased for the third year in succession, growing +5.0% across the region to reach EUR13.5m. Three-quarters of collections were made in South Africa, where a rise of +10.2% drove the total above EUR10m for the first time.

This was supported by the joint licensing agreement between SAMRO and CAPASSO.

In many countries, digital revenues decreased slightly, but Côte d'Ivoire grew by +6.2%, adding EUR715k to the regional total. The fastest growth came in Botswana, Namibia and Malawi, although from a relatively small base.

Private copying growth shows earning potential for creators

Private copying is a key source of income for creators, and this was illustrated in the Africa region in 2023 as income from private copying grew +28.5% to EUR12m. The largest driver was a +24.5% rise in Morocco, where half of the year's collections was made. Income in Malawi increased by +79.2%. Côte d'Ivoire revenues grew more than three-fold while Guinea made collections for the first time.

The private copying data illustrates the importance of the new Regional Directive harmonising rules on private copying. This Directive was adopted by the eight-member-state UEMOA (West African Economic Monetary Union) in September 2023.

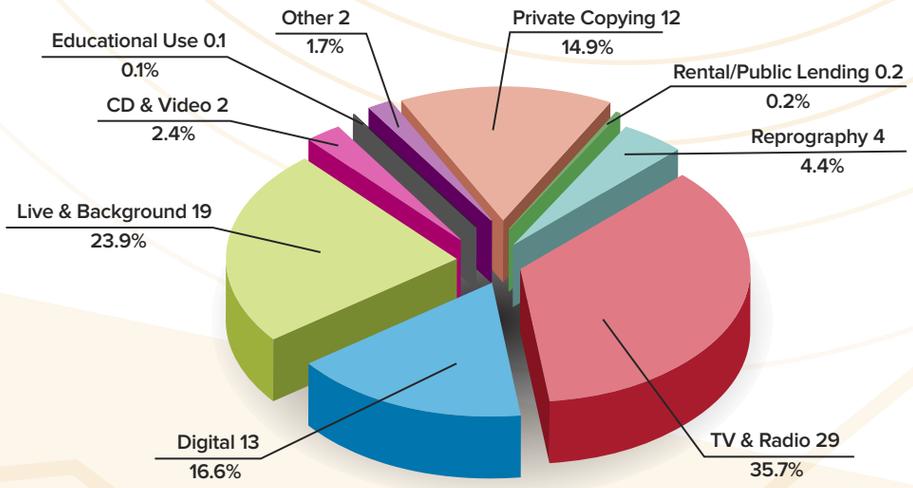
Top three collecting countries (EUR million)

Country	Collections	Growth
SOUTH AFRICA	42	-2.5%
MOROCCO	8	+24.1%
CÔTE D'IVOIRE	7	+12.2%
Grand Total	**81**	**+3.2%**

Breakdown of collections by type of use (EUR million)

Use category	Collections	Growth
TV & Radio	29	-11.0%
Digital	13	+4.9%
Live & Background	19	+13.5%
CD & Video	2	-13.9%
Educational Use	0.1	-
Other	2	+102.6%
Private Copying	12	+28.5%
Rental/Public Lending	0.2	+1441.1%
Reproduction	0.02	+634.5%
Reprography	4	-4.4%
GRAND TOTAL	**81**	**+3.2%**

Share of collections by type of use (EUR million)



Tables of collections

ALL REPERTOIRES

COLLECTIONS FOR ALL REPERTOIRES IN EUR MILLION

RANK	COUNTRY/TERRITORY	COLLECTIONS	GROWTH	GLOBAL SHARE
1	UNITED STATES	2,839	+8.1%	21.7%
2	FRANCE	1,777	+4.7%	13.6%
3	UNITED KINGDOM	1,174	+7.4%	9.0%
4	GERMANY	1,039	+7.8%	7.9%
5	JAPAN	895	-3.0%	6.8%
6	ITALY	698	+22.9%	5.3%
7	AUSTRALASIA	427	+0.1%	3.3%
8	CANADA	357	+5.7%	2.7%
9	SPAIN	330	-1.5%	2.5%
10	NETHERLANDS	316	+7.6%	2.4%
11	KOREA, REPUBLIC OF	279	+9.3%	2.1%
12	SWITZERLAND	261	+8.6%	2.0%
13	MEXICO	226	+39.0%	1.7%
14	BRAZIL	224	+23.4%	1.7%
15	SWEDEN	203	+10.1%	1.5%
16	ARGENTINA	177	+23.8%	1.3%
17	DENMARK	166	+7.0%	1.3%
18	BELGIUM	155	+6.6%	1.2%
19	POLAND	149	+23.2%	1.1%
20	AUSTRIA	124	-1.6%	0.9%
21	FINLAND	118	+2.6%	0.9%
22	NORWAY	80	+4.4%	0.6%
23	PORTUGAL	72	+13.2%	0.5%
24	CZECH REPUBLIC	69	+17.3%	0.5%
25	ISRAEL	60	+1.7%	0.5%
26	INDIA	57	-15.1%	0.4%
27	CHINA	51	-8.1%	0.4%
28	RUSSIAN FEDERATION	44	-9.2%	0.3%
29	HUNGARY	43	+3.0%	0.3%
30	HONG KONG	43	+0.8%	0.3%
31	SOUTH AFRICA	42	-2.5%	0.3%
32	CHILE	42	+29.8%	0.3%
33	GREECE	40	+28.6%	0.3%
34	COLOMBIA	40	+16.9%	0.3%
35	ROMANIA	36	+4.0%	0.3%
36	IRELAND	36	+90.6%	0.3%
37	SINGAPORE	29	+163.6%	0.2%
38	PERU	25	+21.2%	0.2%
39	CROATIA	25	+13.2%	0.2%
40	TURKEY	25	+5.4%	0.2%
41	TAIWAN, CHINESE TAIPEI	23	-21.0%	0.2%
42	SLOVENIA	18	-7.9%	0.1%
43	SLOVAKIA	18	+2.6%	0.1%
44	SERBIA	17	+17.0%	0.1%
45	PHILIPPINES	15	+56.4%	0.1%
46	MALAYSIA	14	-10.2%	0.1%
47	URUGUAY	14	+11.2%	0.1%
48	VIETNAM	12	-40.9%	0.1%
49	THAILAND	11	-4.5%	0.1%
50	LITHUANIA	10	+11.7%	0.1%

Tables of collections MUSIC

COLLECTIONS IN EUR MILLION

RANK	COUNTRY/TERRITORY	COLLECTIONS	GROWTH	GLOBAL SHARE
1	UNITED STATES	2,832	+8.1%	24.1%
2	FRANCE	1,393	+5.1%	11.9%
3	UNITED KINGDOM	1,089	+7.1%	9.3%
4	GERMANY	981	+8.6%	8.3%
5	JAPAN	895	-3.0%	7.6%
6	ITALY	548	+22.3%	4.7%
7	CANADA	357	+5.8%	3.0%
8	AUSTRALASIA	353	+2.3%	3.0%
9	KOREA, REPUBLIC OF	270	+9.6%	2.3%
10	SPAIN	266	-3.0%	2.3%
11	NETHERLANDS	261	+8.8%	2.2%
12	BRAZIL	224	+23.5%	1.9%
13	MEXICO	213	+35.0%	1.8%
14	SWEDEN	186	+11.5%	1.6%
15	SWITZERLAND	166	+13.2%	1.4%
16	DENMARK	157	+7.0%	1.3%
17	BELGIUM	121	+0.7%	1.0%
18	ARGENTINA	102	+8.4%	0.9%
19	POLAND	101	+19.7%	0.9%
20	AUSTRIA	92	+3.0%	0.8%
21	NORWAY	78	+4.4%	0.7%
22	FINLAND	78	+2.8%	0.7%
23	PORTUGAL	61	+14.4%	0.5%
24	INDIA	57	-15.1%	0.5%
25	CZECH REPUBLIC	55	+18.4%	0.5%
26	CHINA	51	-6.3%	0.4%
27	ISRAEL	50	+0.5%	0.4%
28	HONG KONG	43	+0.8%	0.4%
29	HUNGARY	39	+2.8%	0.3%
30	CHILE	39	+32.4%	0.3%
31	SOUTH AFRICA	39	-2.3%	0.3%
32	RUSSIAN FEDERATION	38	-7.8%	0.3%
33	COLOMBIA	38	+19.1%	0.3%
34	IRELAND	35	+91.3%	0.3%
35	GREECE	33	+36.9%	0.3%
36	ROMANIA	31	+7.7%	0.3%
37	SINGAPORE	29	+163.6%	0.2%
38	PERU	25	+21.2%	0.2%
39	TURKEY	25	+5.4%	0.2%
40	CROATIA	23	+13.6%	0.2%
41	TAIWAN, CHINESE TAIPEI	23	-21.0%	0.2%
42	SERBIA	16	+17.2%	0.1%
43	PHILIPPINES	15	+56.4%	0.1%
44	MALAYSIA	14	-10.2%	0.1%
45	SLOVENIA	13	-3.5%	0.1%
46	VIETNAM	12	-40.9%	0.1%
47	SLOVAKIA	12	+8.2%	0.1%
48	URUGUAY	12	+10.7%	0.1%
49	THAILAND	11	-4.5%	0.1%
50	ESTONIA	9	+6.4%	0.1%

Tables of collections AUDIOVISUAL

COLLECTIONS IN EUR MILLION

RANK	COUNTRY/TERRITORY	COLLECTIONS	GROWTH	GLOBAL SHARE
1	FRANCE	264	-0.3%	37.7%
2	ITALY	64	+30.2%	9.2%
3	SWITZERLAND	63	+1.7%	9.0%
4	ARGENTINA	45	+40.1%	6.4%
5	SPAIN	44	-1.1%	6.3%
6	POLAND	42	+28.3%	6.0%
7	NETHERLANDS	21	+9.9%	2.9%
8	GERMANY	20	+1.3%	2.9%
9	UNITED KINGDOM	20	+2.8%	2.8%
10	BELGIUM	20	+59.1%	2.8%
11	AUSTRIA	15	+4.4%	2.2%
12	MEXICO	14	+154.7%	1.9%
13	FINLAND	13	-3.6%	1.9%
14	ISRAEL	9	+8.9%	1.3%
15	CZECH REPUBLIC	8	+9.3%	1.1%
16	GREECE	7	0.0%	1.0%
17	ROMANIA	5	-13.8%	0.7%
18	PORTUGAL	4	+15.2%	0.6%
19	SLOVENIA	4	-21.7%	0.6%
20	SLOVAKIA	3	-25.8%	0.4%

Tables of collections VISUAL ARTS

COLLECTIONS IN EUR MILLION

RANK	COUNTRY/TERRITORY	COLLECTIONS	GROWTH	GLOBAL SHARE
1	FRANCE	47	-5.2%	21.8%
2	GERMANY	38	-6.5%	17.6%
3	UNITED KINGDOM	29	+23.5%	13.3%
4	SWEDEN	17	-3.2%	7.6%
5	NETHERLANDS	14	-5.1%	6.4%
6	ITALY	12	+11.5%	5.6%
7	SPAIN	9	+45.5%	4.0%
8	DENMARK	9	+6.8%	4.0%
9	UNITED STATES	7	-7.2%	3.3%
10	FINLAND	7	+21.9%	3.1%
11	BELGIUM	7	-13.6%	3.1%
12	AUSTRIA	6	-47.8%	2.9%
13	AUSTRALIA	3	+43.3%	1.5%
14	KOREA, REPUBLIC OF	3	+4.0%	1.5%
15	CZECH REPUBLIC	2	+30.4%	1.0%
16	NORWAY	2	+1.8%	0.9%
17	SWITZERLAND	1	-11.7%	0.5%
18	HUNGARY	1	0.0%	0.3%
19	JAPAN	1	-33.6%	0.2%
20	SLOVAKIA	0	+32.5%	0.2%

Tables of collections DRAMA

COLLECTIONS IN EUR MILLION

RANK	COUNTRY/TERRITORY	COLLECTIONS	GROWTH	GLOBAL SHARE
1	FRANCE	67	+17.2%	31.7%
2	ITALY	64	+26.6%	30.5%
3	ARGENTINA	30	+78.6%	14.2%
4	SWITZERLAND	12	-3.1%	5.6%
5	SPAIN	11	+10.0%	5.2%
6	RUSSIAN FEDERATION	6	-16.8%	3.0%
7	POLAND	6	+56.3%	2.9%
8	BELGIUM	5	+47.6%	2.6%
9	PORTUGAL	2	+15.0%	0.9%
10	URUGUAY	1	+17.3%	0.7%
11	LITHUANIA	1	+45.4%	0.4%
12	LUXEMBOURG	1	+25.3%	0.3%
13	LATVIA	1	+52.2%	0.3%
14	BELARUS	1	+49.2%	0.3%
15	SLOVAKIA	0	+63.1%	0.2%
16	ESTONIA	0	+159.9%	0.2%
17	CHILE	0	+75.4%	0.1%
18	MEXICO	0	+692.5%	0.1%
19	ARMENIA	0	+20.7%	0.1%
20	BRAZIL	0	+44.7%	0.1%

Tables of collections LITERATURE

COLLECTIONS IN EUR MILLION

RANK	COUNTRY/TERRITORY	COLLECTIONS	GROWTH	GLOBAL SHARE
1	AUSTRALIA	70	-10.7%	32.5%
2	UNITED KINGDOM	36	+8.2%	16.9%
3	FINLAND	20	+0.7%	9.3%
4	NETHERLANDS	20	+0.5%	9.3%
5	SWITZERLAND	19	+4.0%	8.8%
6	AUSTRIA	10	+3.9%	4.8%
7	ITALY	9	+5.9%	4.3%
8	FRANCE	6	-	2.9%
9	KOREA, REPUBLIC OF	5	0.0%	2.4%
10	PORTUGAL	4	+3.9%	1.7%
11	CZECH REPUBLIC	3	+12.6%	1.6%
12	SOUTH AFRICA	3	-6.6%	1.6%
13	BELGIUM	2	+49.8%	1.1%
14	SLOVAKIA	1	+21.6%	0.6%
15	HUNGARY	1	+5.0%	0.5%
16	SLOVENIA	1	+20.2%	0.4%
17	LITHUANIA	1	+4.4%	0.3%
18	LATVIA	1	+2.9%	0.3%
19	ISRAEL	0	+12.6%	0.2%
20	ALGERIA	0	+6.3%	0.1%

TABLES OF COLLECTIONS

COLLECTIONS PER CAPITA BY COUNTRY/TERRITORY (EUR)

WORLD AVERAGE: 1.86

RANK	COUNTRY/TERRITORY	COLLECTIONS PER CAPITA	REGION
1	SWITZERLAND	29.48	EUROPE
2	DENMARK	27.90	EUROPE
3	FRANCE	26.07	EUROPE
4	FINLAND	21.05	EUROPE
5	SWEDEN	19.22	EUROPE
6	NETHERLANDS	17.66	EUROPE
7	UNITED KINGDOM	17.17	EUROPE
8	AUSTRALIA	16.03	ASIA-PACIFIC
9	NORWAY	14.49	EUROPE
10	ICELAND	14.46	EUROPE
11	AUSTRIA	13.56	EUROPE
12	BELGIUM	13.10	EUROPE
13	GERMANY	12.30	EUROPE
14	ITALY	11.88	EUROPE
15	LUXEMBOURG	9.82	EUROPE
16	CANADA	8.90	CANADA-USA
17	UNITED STATES	8.48	CANADA-USA
18	SLOVENIA	8.28	EUROPE
19	ESTONIA	7.56	EUROPE
20	JAPAN	7.19	ASIA-PACIFIC
21	SPAIN	6.82	EUROPE
22	PORTUGAL	6.81	EUROPE
23	CROATIA	6.43	EUROPE
24	CZECH REPUBLIC	6.31	EUROPE
25	ISRAEL	6.10	EUROPE
26	HONG KONG	5.74	ASIA-PACIFIC
27	KOREA, REPUBLIC OF	5.39	ASIA-PACIFIC
28	LATVIA	5.11	EUROPE
29	SINGAPORE	4.89	ASIA-PACIFIC
30	ANDORRA	4.56	EUROPE
31	HUNGARY	4.52	EUROPE
32	POLAND	4.06	EUROPE
33	URUGUAY	4.00	LATIN AMERICA AND THE CARIBBEAN
34	GREECE	3.89	EUROPE
35	MONTENEGRO	3.86	EUROPE
36	ARGENTINA	3.79	LATIN AMERICA AND THE CARIBBEAN
37	LITHUANIA	3.62	EUROPE
38	SLOVAKIA	3.23	EUROPE
39	SERBIA	2.52	EUROPE
40	CHILE	2.13	LATIN AMERICA AND THE CARIBBEAN
41	ROMANIA	1.90	EUROPE
42	MEXICO	1.76	LATIN AMERICA AND THE CARIBBEAN
43	BARBADOS	1.48	LATIN AMERICA AND THE CARIBBEAN
44	COSTA RICA	1.33	LATIN AMERICA AND THE CARIBBEAN
45	BULGARIA	1.32	EUROPE
46	BOSNIA AND HERZEGOVINA	1.25	EUROPE
47	BRAZIL	1.04	LATIN AMERICA AND THE CARIBBEAN
48	TRINIDAD AND TOBAGO	1.03	LATIN AMERICA AND THE CARIBBEAN
49	COLOMBIA	0.77	LATIN AMERICA AND THE CARIBBEAN
50	PANAMA	0.76	LATIN AMERICA AND THE CARIBBEAN

TABLES OF COLLECTIONS

COLLECTIONS AS % OF GDP BY COUNTRY/TERRITORY

WORLD AVERAGE: 0.012%

RANK	COUNTRY/TERRITORY	COLLECTIONS AS % OF GDP	REGION
1	FRANCE	0.063%	EUROPE
2	DENMARK	0.044%	EUROPE
3	FINLAND	0.042%	EUROPE
4	UNITED KINGDOM	0.038%	EUROPE
5	SWEDEN	0.036%	EUROPE
6	MONTENEGRO	0.035%	EUROPE
7	ITALY	0.033%	EUROPE
8	CROATIA	0.032%	EUROPE
9	SWITZERLAND	0.032%	EUROPE
10	NETHERLANDS	0.031%	EUROPE
11	ARGENTINA	0.030%	LATIN AMERICA AND THE CARIBBEAN
12	SAINT LUCIA	0.029%	LATIN AMERICA AND THE CARIBBEAN
13	SLOVENIA	0.028%	EUROPE
14	ESTONIA	0.027%	EUROPE
15	AUSTRALIA	0.027%	ASIA-PACIFIC
16	PORTUGAL	0.027%	EUROPE
17	BELGIUM	0.026%	EUROPE
18	AUSTRIA	0.026%	EUROPE
19	GERMANY	0.025%	EUROPE
20	SERBIA	0.024%	EUROPE
21	LATVIA	0.024%	EUROPE
22	JAPAN	0.023%	ASIA-PACIFIC
23	SPAIN	0.023%	EUROPE
24	CZECH REPUBLIC	0.022%	EUROPE
25	HUNGARY	0.022%	EUROPE
26	MALAWI	0.022%	AFRICA
27	ICELAND	0.020%	EUROPE
28	URUGUAY	0.019%	LATIN AMERICA AND THE CARIBBEAN
29	POLAND	0.019%	EUROPE
30	GREECE	0.018%	EUROPE
31	CANADA	0.018%	CANADA-USA
32	NORWAY	0.018%	EUROPE
33	KOREA, REPUBLIC OF	0.017%	ASIA-PACIFIC
34	BURKINA FASO	0.017%	AFRICA
35	BOSNIA AND HERZEGOVINA	0.016%	EUROPE
36	LITHUANIA	0.014%	EUROPE
37	SLOVAKIA	0.014%	EUROPE
38	NORTH MACEDONIA	0.014%	EUROPE
39	MEXICO	0.014%	LATIN AMERICA AND THE CARIBBEAN
40	CHILE	0.013%	LATIN AMERICA AND THE CARIBBEAN
41	CABO VERDE	0.013%	AFRICA
42	ISRAEL	0.012%	EUROPE
43	SOUTH AFRICA	0.012%	AFRICA
44	HONG KONG	0.012%	ASIA-PACIFIC
45	UNITED STATES	0.011%	CANADA-USA
46	COLOMBIA	0.011%	LATIN AMERICA AND THE CARIBBEAN
47	BRAZIL	0.011%	LATIN AMERICA AND THE CARIBBEAN
48	ANDORRA	0.011%	EUROPE
49	CÔTE D'IVOIRE	0.010%	AFRICA
50	PERU	0.010%	LATIN AMERICA AND THE CARIBBEAN

MEMBERSHIP *by region*

116 COUNTRIES/TERRITORIES - 227 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 - 110 members

SOCIETY	STATUS	REPERTOIRE	COUNTRY/TERRITORY
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
EAU	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
GEMA	M	M	GERMANY
GESAC	A	NR	BELGIUM
GESTOR	M	AGP	CZECH REPUBLIC
HDS-ZAMP	M	M	CROATIA
HUNGART	M	AGP	HUNGARY
IAF	A	AV	UNITED KINGDOM
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
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
SEF	P	AV	TURKEY
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
VISARTA	P	AGP	ROMANIA
VISDA	M	AGP	DENMARK
ZAIKS	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
DGA	A	AV	UNITED STATES
DRCC	M	AV	CANADA
SARTEC	A	AV	CANADA
SOCAN	M	M, AGP	CANADA
SPACQ	A	M	CANADA

Members reclassified to Provisionals
COSCAP (Barbados, M), DIRECTORES (Mexico, AV), NASCAM (Namibia, MU)

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 - 227 MEMBERS

ASIA-PACIFIC
17 countries/territories - 30 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
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
MACA	M	M	MACAU
MACP	M	M	MALAYSIA
MCSC	M	M	CHINA
MCT	M	M	THAILAND
MOSCAP	P	M, AV	MONGOLIA
MRCSN	P	M	NEPAL
MÜST	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

New CISAC members as of May 2024:

SOCIETY	STATUS	REPERTOIRE	COUNTRY/TERRITORY	REGION
AVRS	P	AV	NIGERIA	AFRICA
DYGA	P	AV	CHILE	LATIN AMERICA
IAF	A	AV	UNITED KINGDOM	EUROPE
LESCOSSA	P	M, AV, D, AGP	LESOTHO	AFRICA
SEF	P	AV	TURKEY	EUROPE
VISARTA	P	AGP	ROMANIA	EUROPE

LATIN AMERICA & THE CARIBBEAN
22 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
AUTVIS	M	AGP	BRAZIL
COSCAP	P	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	P	AV	MEXICO
DYGA	P	AV	CHILE
ECCO	P	M	CHILE
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
SADAIC	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
SOGEM	P	AV, D, L	MEXICO
SOMAAP	M	AGP	MEXICO
SPAC	M	M	PANAMA
UBC	M	M	BRAZIL

AFRICA
28 countries - 30 members

SOCIETY	STATUS	REPERTOIRE	COUNTRY/TERRITORY
AVRS	P	AV	NIGERIA
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
COSOMA	P	M, L	MALAWI
COSOTA	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	P	M	NAMIBIA
OMDA	P	M, AV, D, L	MADAGASCAR
ONDA	M	M, AV, D, L	ALGERIA
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

Societies no longer CISAC members as of May 2024:

AAS (Azerbaijan, M, AV, D, AGP), COSOZA (United Republic of Tanzania, M), BSCAP (Belize, M)

CISAC Client RMEs:

ALLTRACK (United States, M), BMI (United States, M), CMRRA (Canada, M), DALRO (South Africa, L, D, AGP), ESMAA (United Arab Emirates, M), Hexacorp Ltd (United States, M), MCPS (United Kingdom, M), NexTone (Japan, M), SESAC (United States, M), Soundreef (United Kingdom, M), UNISON (Spain, M)

STATUS WITHIN CISAC

M = Member **A** = Associate **P** = Provisional

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 227 collective management organisation (CMO) members in 116 countries to generate this comprehensive global collection report. This 2024 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.

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., photo-copiers 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. 37% of collections declared to CISAC come from the Eurozone while 22% are expressed in US dollar, 9% in pound sterling and 7% 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 2023. 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. This may also affect national comparisons, except when it is noted that local currencies have been used.

Collection figures have been rounded up or down to the nearest million or thousands. Some totals may be affected and don't add up exactly to the sum of data because of the rounding effect. Percentages are calculated using the actual unrounded figures. In this 2024 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 CISAC membership. 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 flowing via the Mechanical Licensing Collective (MLC) is not included in this report as the MLC is not a CISAC member. ■

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