

CISAC GLOBAL COLLECTIONS REPORT 2022

FOR 2021 DATA



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



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Foreword
Björn Ulvaeus,
President of CISAC

TWO THINGS CREATORS NEED IN THE STREAMING WORLD: FAIR VALUE AND BETTER METADATA

Behind its dry veneer, CISAC's Global Collections Report tells a story I care a lot about. It's a human story of songwriters, painters, screen directors, writers, lyricists and other creators, whose work inhabits the culture around us. These are the people, across all repertoires, who make up the "royalty economy", and they are the lifeblood of our creative industries.

These are tough times to be trying to make a living as a creator. Yes, digital royalties collected by CISAC societies are growing impressively. And there are wonderful opportunities provided by the streaming world. But that same world, where tens of thousands of creative works are uploaded daily to streaming services, is still unfinished business when it comes to ensuring a fair environment to earn a living.

Life was simpler and more predictable for me when we launched Abba in the 1970s. But I am not, for one minute, nostalgic for the past—only impatient for a better future for creators, and for good decisions by those who can make that happen.

As President of CISAC, I've tried my very best to bring about positive change. And in the last year I'm pleased to see signs of progress. On the one hand, pressure is

mounting for fair value and greater transparency on creators' remuneration—something CISAC societies have long been calling for. GEMA's report on the music streaming sector in Germany is the latest study to nourish this important debate.

On the other hand, I feel hopeful that something is now happening to engineer the big leap forward that is needed on the issue of metadata. This is a massive priority, as without good metadata, we cannot have a healthy creative sector where creators get fairly paid.

Right now, too much of the data needed to identify and remunerate creators is incomplete or missing when works are ingested on streaming services. The result is a lot of money—hundreds of millions of dollars, I estimate—that is left on the table when it should be going into creators' pockets.

On the music side, CISAC has done a fantastic job upgrading the music works identifier ISWC and making it available to societies. But despite this, wider adoption of the newly-improved code is slow. It is essential that the different parties involved—societies, publishers, labels, DSPs, tech companies, managers and of course creators themselves—now work in collaboration to fix the problem.

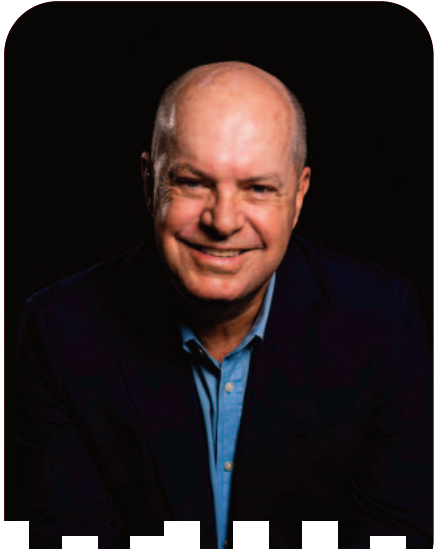
Last year I helped announce a brilliant initiative, launched by the Ivors Academy in the UK. "Credits Due" is a campaign that has asked for industry organisations to make a pledge to ensure that complete and accurate metadata is captured on recordings at the point of creation. It now has 70 supporting organisations, including CISAC.

|| The streaming world is still unfinished business when it comes to ensuring a fair environment to earn a living. ||

As part of its enquiry into the streaming market, the UK government is now dedicating attention to the issue and exploring ways forward.

These are positive developments which, in combination, signal to me that things are now moving in a serious direction—as they must.

There is still a massive amount of work and willpower needed to solve these issues of fair value and good metadata. And I have no doubt at all that CISAC, with its unique platform and its global reach, will have a crucial role in making this happen. ■



Foreword
Marcelo Castello Branco,
Chair of the CISAC Board

WE ARE BACK TO BUSINESS, BUT THERE ARE CHALLENGES AHEAD

We are back to business around the world. Our member societies have driven a return to growth by showing their finest quality—the ability to adapt and change to keep pace with the rapid shift to digital.

The COVID crisis of 2020 and 2021 has tested our ability to serve creators and ensure their remuneration, improve our service and handle the ever more complex network of business partners. And on all these fronts, we have met the challenge. But more, and possibly greater, challenges lie ahead.

This latest CISAC Global Collections Report shows that we are on our way to recovery, but that our world is not the same as it was before. 2022 has seen cause for celebration as collections, especially for live and public performance, have come flowing back. But the numbers here are never going to tell the whole story. We need to see this year not just as a return to normality, but as a bridge to the next phase—with the new opportunities and challenges it brings.

In the near term, we face the prospect of economic slowdown ahead and the risks that come with the unusual combination of inflation and recession.

There are also signs of some vulnerability in the subscription streaming world, especially in the audiovisual sector, as the economic pressures make themselves felt. In the music sector, subscription prices are already undervalued and need to be raised, with prices having barely changed since the early days of the streaming model. Fair value and fair terms are essential so as not to compromise the remuneration of rightholders.

Despite those uncertainties, streaming and subscription have become massive markets for creators, with plenty of room for long-term growth. There are promising new revenue-sharing models, and streaming platforms are generally flourishing across all repertoires represented by CISAC.

One critical area to which we need to give more attention is data management. Dealing with the trillions of transactions

of the streaming market requires unprecedented investment by societies. To serve creators as we should, we must have robust industry and multi-platform identifiers and a collective system to manage them. CISAC is deeply engaged in this effort, leveraging its tools and its global network.

Subscription prices are already undervalued and need to be raised, with prices having barely changed since the early days of the streaming model.

This isn't just about education and improving the recognition of creators online: it's about fairness in the way creators are treated in the streaming environment.

The exciting opportunity for societies today is to continue to adapt and grow income in the digital world. We need to seize this opportunity, staying relevant to creators and to the extraordinary creative sector that we are privileged to represent. ■



Foreword
Gadi Oron,
Director General

WE NEED TO BRING GREATER VALUE TO CREATIVE WORKS IN THE DIGITAL MARKET

It gives me great pleasure to introduce our new Global Collections Report. Once again our Report gives a unique overview of creators' royalty collections for all repertoires, based on exclusive data coming from CISAC's 228 member societies across the world.

The good news is that royalties collected by CISAC members are back to growth. Collections in 2021 rose 5.8% to EUR9.6bn, restoring our sector's pre-COVID upward year-by-year trend.

After the 10% fall experienced in 2020, our societies' return to growth is an impressive achievement. It is a result of quick adaptation to the new reality as many societies moved to focus and enhance their digital licensing.

The recovery is only half done, however. Even after the growth of 2021, collections remain more than 5% below their pre-pandemic level. Live and public performance income dropped dramatically in 2020 and 2021 and are only emerging now from an almost total collapse. Digital income might be powering ahead, but its share of overall collections is still too small to compensate for the losses in the live concerts and public performance sector.

One thing is clear from the analysis of this Report: the growing importance of digital within all repertoires. Creators saw digital royalties rise by a healthy 28% in 2021. There is, without a doubt, much more room for growth. Digital still represents only 33% of all collections which is, by comparison, less than half of the share accounted for by digital in the recording industry. The message is clear: we need to bring more value to creative works in the digital market, and we need a fairer ecosystem.

Growing global digital collections is today CISAC's top priority. First, we are working to constantly improve the data management that helps drive collections. That is why we push forward with improvements and new services around the music works identifier ISWC, a key part of the infrastructure of the streaming market. The next phase is to make the ISWC work more accurately and seamlessly across the value chain, including the participation of publishers and digital services.

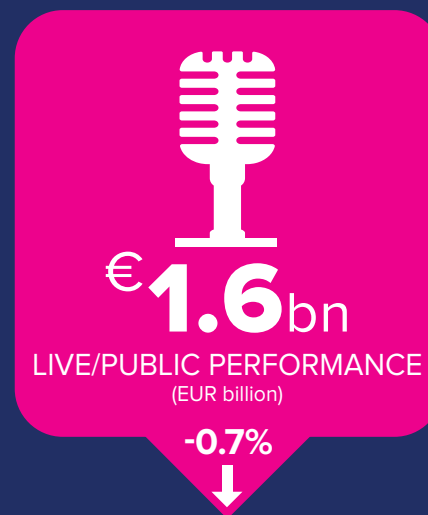
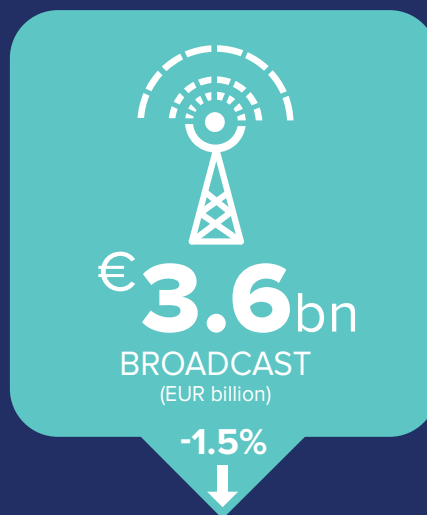
Advocacy and education have a key role too: CISAC is working with members to create a fair environment in music, audiovisual, visual arts and other repertoires.

Through lobbying, negotiation and, where needed, litigation, our societies help improve rights, fix laws, and secure better licencing terms for creators' works. The case studies in this report, from eight countries - Japan, Bulgaria, India, South Africa, Chile, France, Denmark and Canada - highlight those efforts.

|| Creators saw digital royalties rise by a healthy 28% in 2021. There is, without a doubt, much more room for growth. ||

Looking ahead, we can expect further growth in 2022, helped by the return of live concerts, theatres and exhibitions. But there is uncertainty too, with the ongoing cost of living crisis. Whatever the impact this will eventually have on royalties, I am confident that CISAC's global network will continue to lead in the fight for fair value for creators' works. ■

2021 GLOBAL COLLECTIONS



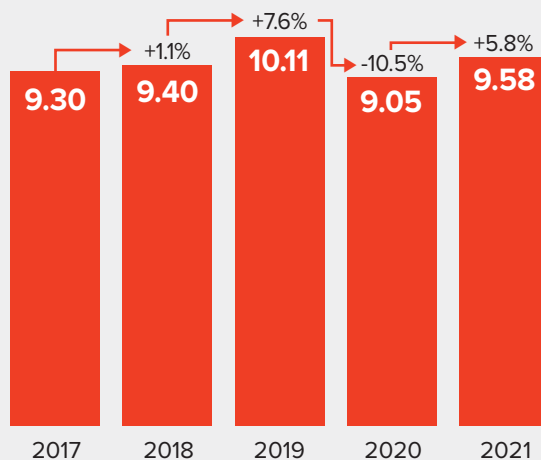
CISAC GLOBAL COLLECTIONS REPORT

HIGHLIGHTS AT A GLANCE

GLOBAL COLLECTIONS ROSE +5.8% TO EUR9.58BN IN 2021

Global collections returned to growth in 2021, increasing by +5.8% to reach EUR9.58bn. This reversed the previous year's near -10% fall, but the global total in 2021 remained -5.3% down on pre-pandemic levels as the continued slump in live and public performance limited the impact of growing digital royalties. Europe was the fastest growing region for creators' royalties, rising +7.5%.

Global collections and annual growth¹ (EUR billion)

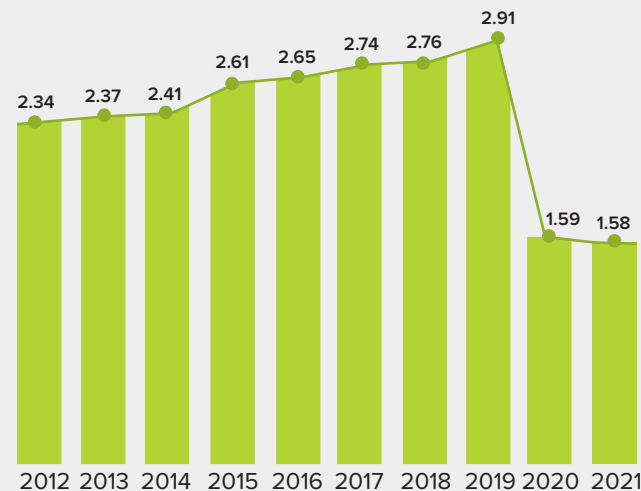


¹) CISAC 2021 data excludes US digital mechanical rights income. Past years are therefore re-stated to show like-for-like comparison.

LIVE AND PUBLIC PERFORMANCE ROYALTIES DOWN -0.7% TO EUR1.58BN IN 2021

Collections in the live and background sector collapsed for a second consecutive year due to lockdown restrictions on concerts, exhibitions and live entertainment. Collections in this sector fell -0.7%, remaining -45.8% below the pre-pandemic levels of 2019. Illustrating the scale of the losses caused by COVID-19 over the two-year period, live and background collections in 2021 were almost one-third below their 2012 total.

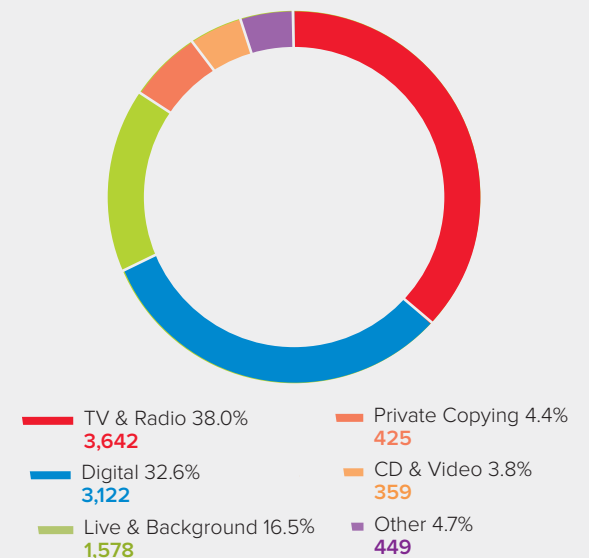
Live and background collections (EUR billion)



BROADCAST REMAINS THE TOP INCOME SOURCE AT EUR3.64BN

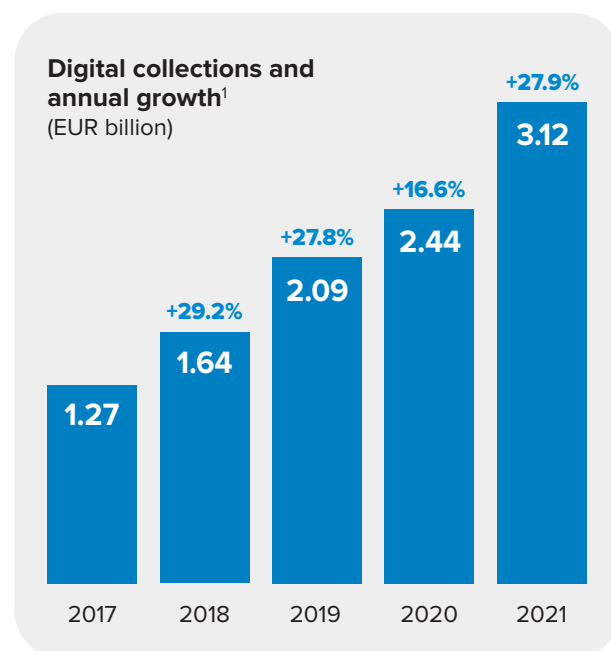
TV and radio royalties, down -1.5%, remained the largest revenue source in 2021, accounting for 38% of global collections despite a continuous slight decline over the last five years. The balance between creators' top three income streams has dramatically shifted with the global shift to digital consumption. Digital royalties' share has grown from 13.6% to 32.6% of total collections since 2017, while live and background's share fell from 29.5% to 16.5% over the same period.

Global mix of creators' income streams in 2021 (EUR million)



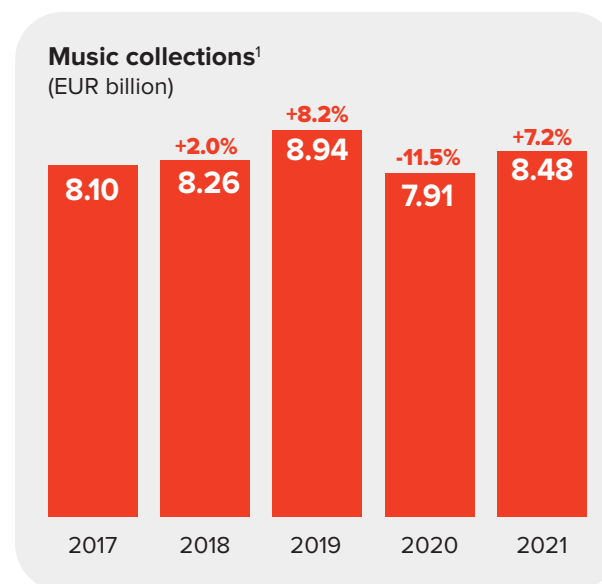
DIGITAL COLLECTIONS UP +27.9% TO EUR3.12BN

Collections from digital sources grew +27.9% to EUR3.12bn, which is +49.1% higher than the pre-pandemic revenue total of 2019. Sharp organic growth in the streaming market, rising music subscriptions, new and renewed deals with digital platforms such as YouTube and TikTok and continued strong growth of subscription video on demand (SVOD) helped drive growth. Digital uses of creators' works remain undervalued however, representing just 32.6% of creators' collections despite the revolution in streaming consumption.



GLOBAL MUSIC COLLECTIONS RISE +7.2%

Total royalties to songwriters and composers grew by +7.2% but remained -5.1% down on the pre-pandemic levels of 2019. Live and public performance income continued to be strangled by lockdown, rising only +0.2% in 2021 and remaining -45.1% down on 2019. Live performance saw a two-year collapse, suffering worse than public performance: data from two-thirds of CISAC's member music societies shows concert and festival income down -73% in 2019. Digital music collections grew +27.5% to EUR3.06bn, with digital market share more than doubling from 15.4% to 36.1% since 2017.



DIGITAL THE PRIMARY SOURCE IN 25 MARKETS

With the shift to streaming, there has been a sharp rise in markets with digital as the largest income source. The two-year period of the pandemic has transformed the share of digital income in those territories, especially in the Asia-Pacific region.

Leading digital markets by share and 2-year growth rate

Country territory	Market Share 2021	Digital growth 2019–2021
INDONESIA	98.2%	+175.4%
THAILAND	89.5%	+343.8%
INDIA	82.1%	+301.9%
VIETNAM	73.4%	+50.4%
HONG KONG	70.8%	+12.9%
PHILIPPINES	69.0%	+37.0%
MEXICO	64.8%	+45.4%
CHILE	56.9%	+113.8%
TURKEY	56.3%	+40.2%
CHINA	53.6%	+5.2%

¹) CISAC 2021 data excludes US digital mechanical rights income. Past years are therefore re-stated to show like-for-like comparison.

CISAC GLOBAL COLLECTIONS REPORT

HIGHLIGHTS AT A GLANCE

TRENDS SPLIT AMONG TOP TEN MARKETS

Despite overall growth in 2021, six of the ten largest markets saw collections remain below the pre-pandemic levels of 2019.

Top 10 markets: 2021 and growth 2019–2021
(EUR million)

Country	Collections	Growth 2021	Growth 2019–2021
UNITED STATES	2,011	+3.6%	+2.2%
FRANCE	1,250	+3.6%	-7.7%
UNITED KINGDOM	884	+31.2%	+7.6%
GERMANY	824	-1.3%	-5.1%
JAPAN	819	+3.7%*	-1.6%*
ITALY	412	-1.2%	-32.0%
AUSTRALIA	344	+5.7%	-0.5%
CANADA	269	+14.0%	+4.5%
SPAIN	249	+19.9%	-4.8%
NETHERLANDS	241	-0.7%	+3.1%
Top 10 Total	7,303		
Global Total	9,575		

*in local currency

ALL REPERTOIRES FEEL COVID IMPACT

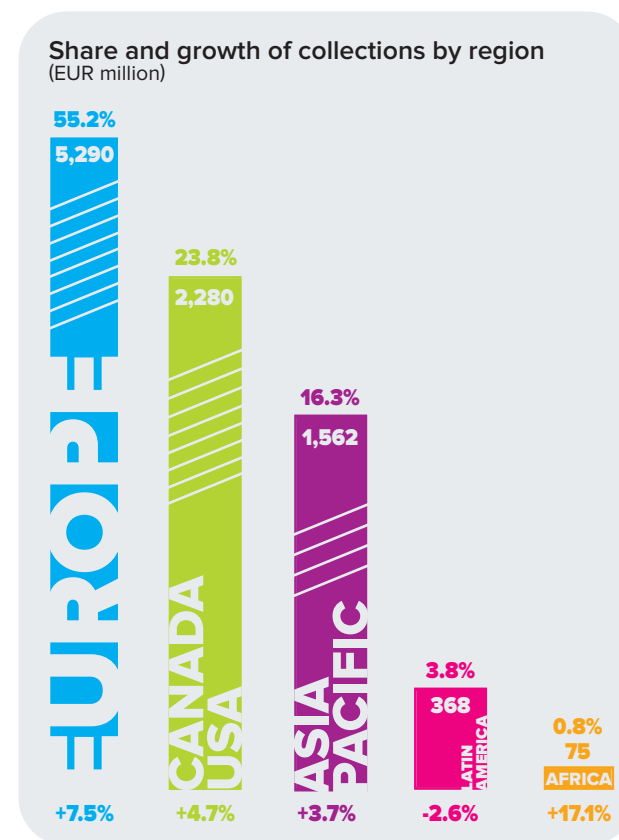
Of the five repertoires represented, only music, accounting for 88.6% of the total, saw royalties growth in 2021. Every other repertoire registered a decrease during the year. The dramatic sector suffered especially, declining -13.8% to reach less than half its pre-pandemic level.

Collections by repertoire, evolution in 2021 (EUR million)

Repertoire	Collections	Annual Growth
Music	8,483	+7.2%
Audiovisual	608	-2.8%
Literary	199	-3.9%
Visual Arts	196	-1.2%
Dramatic	89	-13.8%
Grand Total	9,575	+5.8%

LARGEST THREE REGIONS SEE GROWTH IN 2021

Canada-USA, Europe, Asia-Pacific and Africa returned to growth in 2021 having seen smaller declines during the pandemic than Latin America. Strong digital increases helped Europe to extend its global share by 1% to 55.2%.

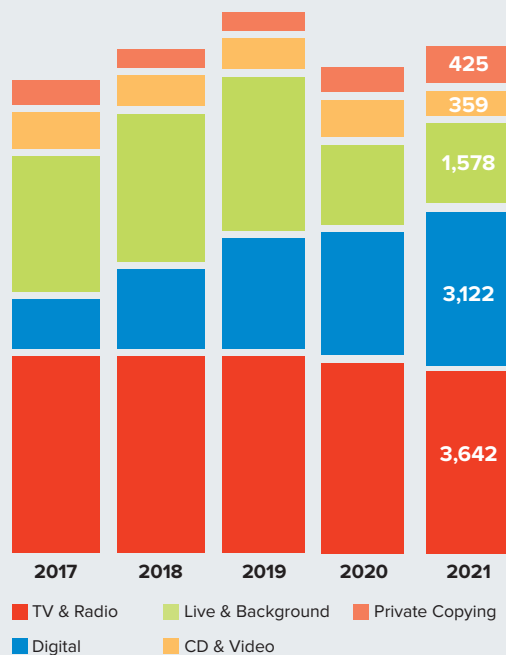


2021 MARKET ANALYSIS

COLLECTIONS GROW +5.8% BUT THE ROAD TO RECOVERY IS FAR FROM COMPLETE

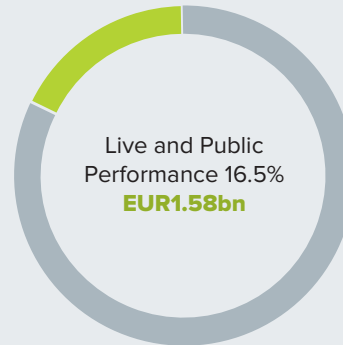
After more than two years of losses, creators' royalties are on the path to recovery to their pre-pandemic levels. The recovery is far from complete, however: while collections rose +5.8% in 2021, they remain -5.3% below the pre-pandemic result of 2019. The COVID crisis transformed the shares of two major income streams: live/public performance and digital. Although these two royalty channels are expected to see robust growth in 2022, the growth of streaming consumption continues to undervalue and deliver poor returns to creators.

Creators' major collections sources, 2017–2021
(EUR million)



LIVE SECTOR RECOVERS SLOWER THAN PUBLIC PERFORMANCE

Live and public performance, which accounted for 29.5% of all creators' royalties in 2017, has now shrunk to account for only 16.5% of global collections.



The live and public performance sector, taking in the exhibitions, cinema and public events sector, remained largely flat in 2021, with very few signs of recovery overall and collections declining by just under 1% for the year. This leaves annual royalty payments in 2021 -45.8% below 2019. The business arising from the concerts, theatres and exhibitions sector remained in a state of near-collapse through

2021 due to a combination of restrictions and reluctance to return to events, especially among an older demographic.

The two-year COVID period devastated careers for many creators. Brazil, one of the epicentres of COVID, saw live and public performance collections for 2021 down -72.4% on pre-pandemic levels. A January 2022 survey led by UBC, along with cRio and ESPM, reveals that approximately 50% of all musicians had lost 100% of their pre-pandemic income. Half of these have been forced to find another professional activity.

Data from a large sample representing around two-thirds of CISAC societies shows the live sector in 2021 -73% below 2019 levels.

CISAC member societies continued to play a key role through 2021 in supporting creators through the crisis, as the case studies in this report illustrate (see page 15).

The path back to full recovery of live and background collections is not smooth, especially for live performance and exhibitions. Data from a large sample representing around two-thirds of CISAC societies shows the live sector in 2021 -73% below 2019 levels, while background uses are only -30% below that pre-pandemic result.

COLLECTIONS GROW 5.8% BUT THE ROAD TO RECOVERY IS FAR FROM COMPLETE

Concerts and festivals surge back in 2022

The lifting of COVID restrictions in most countries from the second quarter of 2022 triggered an explosion of sold-out live events and festivals. Brazil has seen a strong recovery in 2022, driven by local events, national tours and large-scale festivals such as MITA, Rock in Rio and Lollapalooza. Societies in the UK, France, Belgium, Germany and elsewhere have seen the same pattern.

Global events company Live Nation reported a strong start to 2022, with income up +52% in the first quarter, stating that events were “back on the road and fan demand has never been stronger, a reflection that live events remain a clear priority for consumers as our social lives restart”.

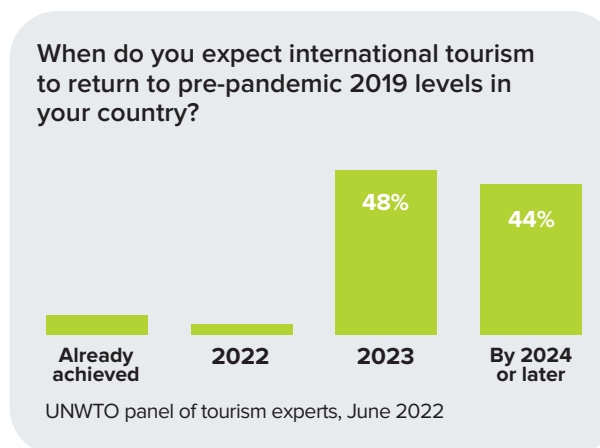
Looking ahead, it may take until 2023 or even 2024 for live royalties to recover their pre-pandemic level. Several factors underlie this slow recovery, including the permanent collapse of some businesses during the pandemic; the sluggish return of small-scale events featuring local artists in some countries; and initial delays in the return of world tours for the big stadium-filling acts. Australasian society APRA AMCOS said high costs, COVID restrictions and lengthy planning periods initially deterred promoters, although many tours are now confirmed for 2023.

Tourism eyes 2023–24 for full recovery

Tourism, an estimated US\$1.9 trillion global industry, is a driver of royalty income for creators. Following its collapse in early 2020, global tourism rose by only +4% in 2021, according to the world tourism organisation UNWTO. International arrivals at the end of 2021 were still -72% down on pre-pandemic levels.

While tourism is now strongly recovering, a return to pre-pandemic levels may only come in 2023, according to UNWTO. Its expert panel survey of June 2022 showed

expectations of recovery to 2019 levels split between 2023 (48%) and 2024 (44%). The Asia-Pacific region is the least optimistic, with only 26% expecting full recovery in 2023.



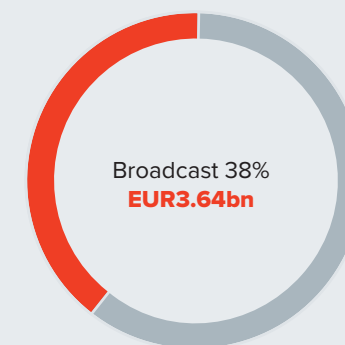
As a counterbalance, many governments are helping the recovery of domestic tourism. For example, the Japanese government has rolled out programmes that provide discounts, coupons and subsidies for domestic travel. For the creative sector, this has helped in the return of large-scale festivals like Fuji Rock and Summer Sonic as well as in the hospitality sector. ■

BROADCAST REMAINS THE MAINSTAY FOR CREATORS

Broadcast collections have maintained a long-term trajectory of slight year-on-year decline in recent years, reflecting the general shift from linear to OTT and on-demand subscription streaming.

COVID has had a smaller impact than on the other two main income streams. Broadcast royalties have proved

Broadcast remains the largest source of global royalty collections, accounting for 38% in 2021 and leading creator's income sources in most countries. Collections from TV and radio declined -1.5% to EUR3.64bn in 2021, down -5.7% from pre-pandemic levels



resilient as ad revenues fell less than expected and recovered more quickly than foreseen over the two years. According to PwC's [Global Entertainment and Media Outlook \(2022–2026\)](#), advertising leaped +22.6% in 2021 following a -7% decline in 2020. Global advertising revenues are projected at annual growth of +6.6% up to 2026. This growth, however, is fed largely by digital while a decline in non-digital advertising is predicted after 2025.

The value of CMOs in broadcast licensing

CISAC's broadcast collection statistics reflect a relentless effort by member societies to negotiate the best possible rates for creators in licensing negotiations with broadcasters. Examples from societies around the world in 2021 illustrate the vital role played by CMOs in this area:

COLLECTIONS GROW 5.8% BUT THE ROAD TO RECOVERY IS FAR FROM COMPLETE

- TONO, Norway: settlement of a major court case with national broadcaster TV2
- SACM, Mexico: new licensing deal with satellite service “SKY”
- GEMA, Germany: new cable retransmission deal with Vodafone
- KODA, Denmark: new agreements on revenue splits with other rightsholders
- JASRAC, Japan: negotiated higher payments for licensing despite a headline rate that has been unchanged in 20 years
- KOMCA, Korea: civil lawsuits regarding terrestrial broadcast management rates
- SABAM, Belgium: settlement with major cable distributor including better remuneration for composers and publishers. ■

DIGITAL NEARS ONE-THIRD OF ALL COLLECTIONS

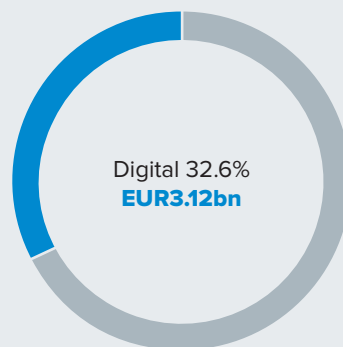
Digital’s rapid growth has continued into 2022, helped by the sustained organic growth of streaming and subscription services and the success of CMOs in getting new and renewed licensing agreements with services. Further strong music streaming growth is expected in 2022. Spotify reported a +14% increase in global music subscribers in the second quarter of 2022 combined with a +31% rise in ad revenue.

Subscription video on demand (SVOD) consumption has also boosted many societies’ digital collections, helped by new market entrants and increased competition (see Futuresource projections, page 12). SVOD is seen as vulnerable to the global cost of living crisis, more so than music streaming since most consumers or families have one music streaming service package but, by contrast,

multiple SVOD subscriptions. Consumers may therefore cut costs by reducing their number of SVOD packages.

In the music sector, a steady spread of new services globally is also helping grow streaming income. Licensing deals have been made in recent years led by platforms such as Facebook, TikTok and YouTube.

Digital collections rose +27.9% to EUR3.12bn in 2021, and now account for 32.6% of all global collections (up +49.1% from 2019).



Are creators getting fair value from streaming subscriptions?

Music subscriptions remain strongly undervalued for creators, in the opinion of many societies. The monthly EUR9.99 subscription has been unchanged for nearly two decades, despite the dramatic increase in consumption and availability of repertoire and long-term year-on-year inflation, which in 2021 has accelerated sharply.

Average monthly streams on a single user music subscription have risen from 400 to 700 in recent years, according to one large society, increasing the mismatch between the value derived by the user and the value returned to the creator. Furthermore, the freemium model continues to offer a lower-value alternative which cannibalises premium subscription. Increased use of discounted bundled offers further erodes average revenue per user.

89% of creators surveyed consider remuneration not adequate (GEMA)

These factors combined are fuelling a debate internationally on the value of streaming to creators. Among some societies, there is significant support for digital services to increase their subscription rates from the typical EUR9.99 established at the outset of music streaming subscription some 15 years ago.

A GEMA-commissioned study by Goldmedia on the streaming market in Germany in September 2022 further informed the debate. Findings include that music authors and publishers receive 15% of the net proceeds of a music subscription, less than streaming services (30%) and labels (42%).

The study found 89% of music creators assess the remuneration from music streaming as inadequate. “The figures of the study prove the urgency of this debate”. says GEMA CEO Harald Heker. ■



David Sidebottom, Principal Analyst,
Futuresource Consulting

WHAT NEXT FOR TELEVISION AND VIDEO CONSUMPTION AND CONSUMER SPENDING IN A POST-PANDEMIC WORLD?

Since the beginning of 2020, the entertainment content markets have experienced unprecedented change, creating increased opportunity and uncertainty in equal measure. The current year started with cautious optimism, but in 2022 new post-pandemic challenges have emerged, with the cost-of-living crisis in particular creating a fresh wave of market uncertainty.

COST SQUEEZE PUTS SUBSCRIPTION UNDER SCRUTINY

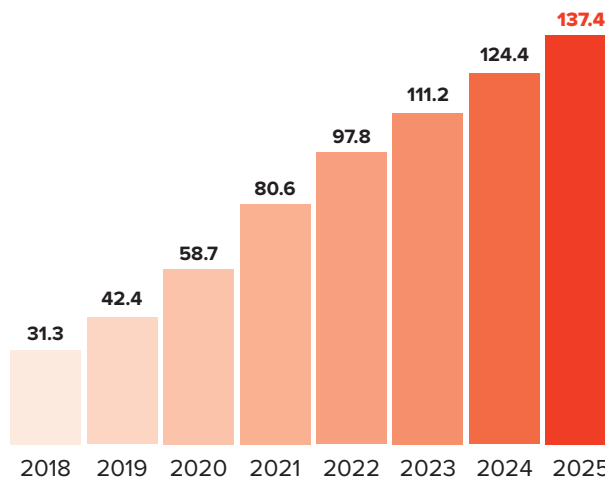
Subscription services are today under the most scrutiny, given how ingrained they have become into consumers' viewing lifestyles. Year-on-year subscription growth has been spectacular for several years: an estimated 1.4 billion subscription video on demand (SVoD) and 525 million music subscribers at the end of 2021, up from 900 million and 310 million respectively at the end of 2019. Can this growth continue, and at what rate?

In 2022 slowdown in growth is expected. This is due partly to natural market maturity as key demographics in established markets reach saturation, combined with the inevitable correction after accelerated uptake during the pandemic. But the cost-of-living crisis has also placed subscription services under pressure. This was illuminated when high-profile service Netflix reported a decline in subscriptions for the first time in the first half of 2022.

20% SVOD GROWTH EXPECTED IN 2022

Despite these pressures, in 2022 the overall SVoD market is still set to continue to grow by over 20%, taking it to an estimated US\$98 billion worldwide, more than double its size in 2019.

Subscription Video on Demand
Retail value (\$bn)



Several factors are driving this continued growth, including the continued rollout of new direct-to-consumer services internationally, such as Paramount+, HBO Max and Discovery+. Price increases on a number of services in many countries, most notably Netflix are also having an impact. As subscriber growth slows, this is an obvious strategy for services to help grow their profitability. But it also risks subscriber attrition, coming at a time when consumers are acutely aware of the squeeze in their disposable income.

Fewer new SVoD services are being launched today than pre-COVID, with 'service stacking' (i.e. consumers taking additional, multiple services) giving way to 'service surfing' (consumers switching between services). In this emerging economic reality, consumers may look to extract as much value as they can from each service they take, and potentially take fewer overall than previously. As a result, the average number of SVoD subscriptions per household – ranging in a number of developed markets from 1.5 to 3.5 (US services only) - is expected to marginally decline in 2022.

WHAT NEXT FOR TELEVISION AND VIDEO CONSUMPTION AND CONSUMER SPENDING IN A POST-PANDEMIC WORLD?

Futuresource Analysis

WILL CONSUMERS STREAMLINE SVOD SUBSCRIPTIONS?

These factors present a major challenge for all SVoD platforms, as multiple service uptake has been the key driver of market growth in recent years. In response, established services will seek to protect their customer bases through a combination of regular, strong content ‘drops’, bundling packages with telco and Pay-TV services and, in some cases, annual plans. Disney+ has used all these elements to help grow its subscriber base in 2021 and 2022 and is typically priced around half the premium Netflix plan. Amazon Prime Video competes with other benefits, such as free shipping, to help reduce consumer churn. Smaller services with a more limited content library could become more reliant on price promotions to drive subscriptions. These impact both revenue and profitability of the services, however.

ADVERTISING VOD TURNS UP THE HEAT

Adding to this mix of drivers is the marked increase in ad-supported video-on-demand. In late 2022, the changing subscriber fortunes of Netflix will see it launch an advertising-funded tier, a move it had historically ruled out. Disney+ will likely follow suit in 2023. It is anticipated that these advertising tiers will help grow the services’ overall subscriber base and reach, whilst also expanding revenue diversity. In the USA, established SVoD service,

Hulu (majority owned by Disney), has most of its subscribers taking the lower-cost ad-funded tier rather than the more expensive ad-free version.

Dedicated AVoD services and FAST Channels (Free Ad-Supported Television) are also continuing to proliferate internationally, further increasing the dynamism in the free TV and video sector. Futuresource’s “Living With Digital” survey suggests that over 1 in 5 European consumers watch AVoD programming on services such as Pluto TV, Rakuten TV or Samsung TV Plus, with awareness and uptake growing significantly since the beginning of the pandemic. In the USA, where such services are now mass market, around half of consumers already use these services on a monthly basis.

BROADCAST VIDEO-ON-DEMAND (BVoD) IN THE MIX

Competing with subscription and ad-supported services, many leading broadcasters worldwide continue to invest significantly in their BVoD and streaming strategies. Most younger viewers no longer rely on broadcast linear TV for their viewing – Futuresource’s Living With Digital survey suggests that less than 25% of video and TV viewing amongst 16-25 year-olds is via traditional linear TV in established streaming markets. This compares to well over half in the over 45s.

A number of free-to-air broadcasters worldwide are drawing larger audiences for shows on their streaming services than on their linear TV channels. This trend is set to continue, with increased premiering or exclusive releases of TV shows on BVoD platforms. Many commercial broadcasters will look to “up-sell” this free BVoD audience to paid-for ad-free offerings across the longer term, as the boundaries between SVoD, AVoD and BVoD merge.

MORE OUTLETS, MORE COMPETITION

All this amounts to increased competition for consumer viewing, with important potential implications for rights holders. With BVoD services providing familiarity, quality, and breadth, and AVoD services likely to further stimulate curiosity amongst a wider base, many consumers may look to re-assess their spending on paid-for digital services. Futuresource’s most recent Living with Digital survey from summer 2022 suggests that a sizeable proportion of consumers plan to spend less across digital video services during the remainder of the year, highlighting the current uncertain mindset amongst the video entertainment population. However, this does provide an opportunity to drive free or advertising funded streamed viewing.

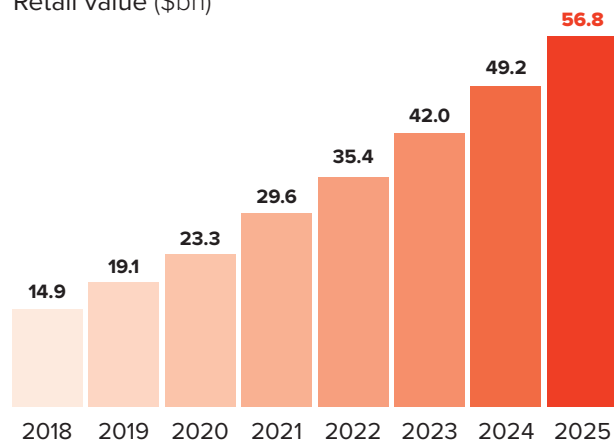
WHAT NEXT FOR TELEVISION AND VIDEO CONSUMPTION AND CONSUMER SPENDING IN A POST-PANDEMIC WORLD?

Futuresource Analysis

MUSIC SUBSCRIPTION GROWTH STILL ROBUST

The music subscription market continues to exceed expectations and withstand ongoing challenges to its growth, and the cost of living crisis is not expected to significantly dampen momentum.

Music Subscriptions
Retail value (\$bn)



Futuresource expects 1 billion global music subscriptions to be exceeded in 2026, with double digit growth each year before then, with emerging markets, including China, gaining in significance. Whilst a slow-down in growth is anticipated, due partly to saturation in some countries and demographics, music subscription has

become a commodity for many, with most music subscribers unwilling to trade down to a free, ad-funded offering.

Growth in creator royalty payments will be assisted by price increases. These will help drive a higher rate of revenue growth (compared to growth in subscriptions), meaning that the sector is on course to exceed \$60 billion by 2026 - double the level of 2021 figure.

Futuresource expects 1 billion global music subscriptions to be exceeded in 2026, with double digit growth before then.

TAKEAWAYS FOR CREATORS AND CMOs

For creators and CMOs, the good news in the evolution of video viewing and continued growth in music subscriptions, is an ever-growing number of outlets for creators to reach consumers with their content.

Despite the uncertainties, royalties from SVOD are set for continued strong growth, with the slowdown in revenue less noticeable than for overall subscriptions. Overall consumer spend on SVoD will reach close to \$140 billion by 2025 – 40% higher than the estimate for 2022.

The new advertising paradigm will see the fragmentation of royalty sources, with traditional linear broadcast set to decline slowly, but steadily.

This changing mix of royalties is not expected to happen quickly - but the change is inevitable. ■

SOCIETY CASE STUDY



Kazumasa Izawa,
JASRAC President



PROJECTS TO BUILD TOMORROW'S INFRASTRUCTURE

As revenues from digital have grown significantly in the past five years, Japanese rights society JASRAC has been active building up its infrastructure through various projects designed to deal with the increasing volume of transactions and the accuracy of data.

One of the key projects involves JASRAC and other CMOs in the Asia-Pacific region, that have joined forces to develop the Global Digital Service Data Exchange (GDSDX). The GDSDX is a common platform to share pre-matched work data of music used by digital services, with a view to have the platform used by all CISAC music societies in the future.

For JASRAC, the project is designed to respond to the growth in the “enormous” volume of musical works used through digital services, which is challenging music copyright organizations’ ability to capture and identify all the uses of music in more efficient and less labour-intensive ways. JASRAC is funding the system development costs of this project.

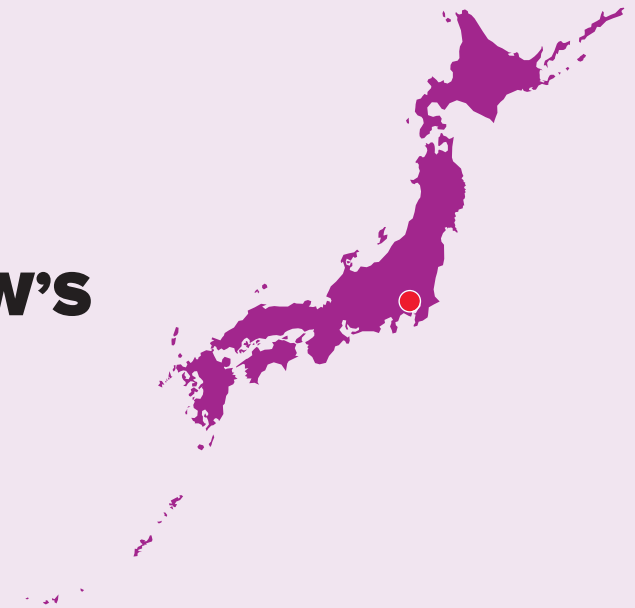
Another important project for the society is KENDRIX, a data exchange platform that will enable creators to

protect themselves from author impersonation and other abuses by certifying the existence of creators’ musical works. KENDRIX was released as a closed beta version in June 2022, with its official launch scheduled for October 2022.

At launch, KENDRIX will be equipped with an online identity verification system for creators (eKYC), allowing them to apply for JASRAC membership and to submit work registration forms. The service is available free of charge to JASRAC-affiliated and non-affiliated creators.

In addition, to improve the quality of data related to the public performance of works, JASRAC has been testing the Audoo Audio Meter technology at multiple DJ clubs in Tokyo. The system is based on a device that automatically identifies songs by using fingerprinting technology.

These projects are all aimed at the same goal: improve the quality of data through the use of the most up-to-date technologies in order to maximise the volume and accuracy of royalties distributed to members, in a cost-effective manner.



Overall, after two testing years, JASRAC royalty collections for fiscal year 2021–22 (April 2021–March 2022) amounted to JPY 116.73 billion, showing an increase of JPY 4.08 billion compared to fiscal 2020. This is the second largest level of collections in the history of JASRAC, after fiscal 2019. ■

We secured a high level of royalty distributions despite the pandemic. Incorporating the newest technologies, we aim to conduct our business in a way everybody involved in music can appreciate.

Kazumasa Izawa,
JASRAC President



Marie Anne Ferry-Fall,
Director General of ADAGP



ADAGP SIGNS “HISTORIC” LICENSING DEALS AND FIGHTS FOR CREATORS’ RIGHTS

After a year 2020 marked by ongoing support for artists in times of a major health crisis, the year 2021 brought some return to normalcy for ADAGP, with progress on the licensing front and with creators' rights.

The Paris-based society finalised an innovative partnership agreement with Google intended to support and remunerate visual arts authors in the digital ecosystem.

The two-prong deal, described as “historic” by ADAGP, consists of a licensing agreement, which will remunerate ADAGP members for the use of their works, and the creation of a support fund for the benefit of the artists represented by ADAGP. Both agreements are for a period of ten years. The first payments as part of the agreement were made in the Autumn of 2021.

Another accomplishment on behalf of ADAGP’s members is the progress towards securing recognition of a right of

exhibition by both the French government and venues where art is exhibited.

Overall, 2021 collections bear witness to these advances, with EUR49m collected in 2021 (an +8% increase compared to 2020). Income from the resale right, in particular, increased significantly in 2021, reaching EUR16.1m. This was a +40% increase on 2020, testifying to the dynamic recovery, in France and abroad, of the art market after long months of inactivity.

ADAGP also stepped up its advocacy activity in 2020–21. Since 2020, ADAGP has been an observer at the World Intellectual Property Organisation's Standing Committee on Copyright and Related Rights (SCCR), helping to develop toolkits to promote the resale right in countries wishing to implement it or enforce it more effectively. ■

|| 2021 has been a very satisfying year in many respects, with the signing of our agreements with Google and the changes with the exhibition rights, which have been implemented in a certain number of museums and art centres. But there is still a lot of work to be done.

|| **Marie Anne Ferry-Fall,**
Director General
of ADAGP

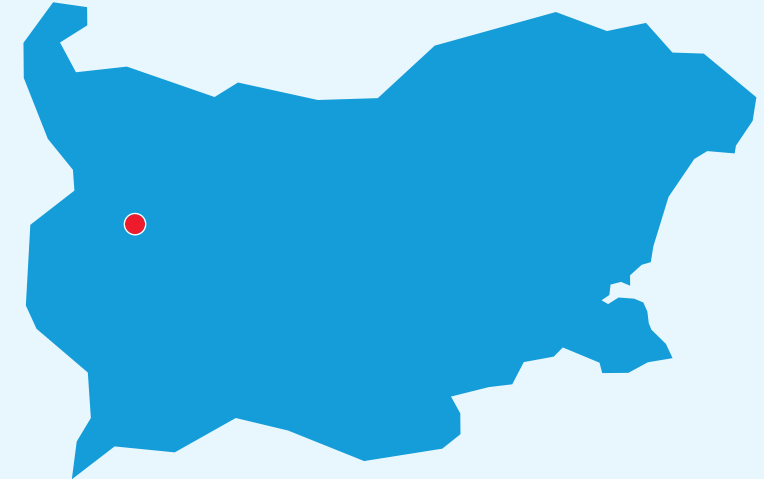
SOCIETY CASE STUDY



Victor Bozhinov,
Film director and Chairman
of the Board of Filmautor



Ivan Dimitrov,
CEO of Musicautor



SOCIETIES JOIN FORCES TO CAMPAIGN FOR CHANGE IN BULGARIA

Authors in Bulgaria suffer from one of the lowest levels of remuneration in Europe. This is due in large part to the state's inability to create an environment for the professional growth of artists. The COVID crisis only worsened the situation.

Bulgaria spends EURO.11 and EURO.06 per capita on royalties for audiovisual and music creators respectively, according to CISAC data in 2021. Despite this, CISAC's member societies achieved collections growth in 2021. Musicautor grew collections by +8%, with digital income up +222% due to licensing agreements with Tidal, Deezer, Facebook, Instagram and TikTok, and with a major domestic mobile operator for the HBO GO service. Live royalties also recovered, up +45%.

To achieve a more sustainable growth, Musicautor and Filmautor, along with Artisautor, launched in 2021 the Alliance for the Development of Creative Forces (ARTS). It aims to support the relevant institutions and contribute

to economic development while also ensuring transparency, fairness and better conditions for creators.

The campaign highlights the extremely low rates in the broadcast sector, which have not changed since 2001. It also aims to fix contradictions in the legal landscape for the collective management of authors' rights, especially the ability of users to completely circumvent authors' rights for the retransmission of works. Creators also face poor enforcement and an ineffective procedure for solving tariff disputes with users.

The government is slow to act. In 2021 the EU opened an infringement procedure against Bulgaria for not implementing the Copyright Directive and Broadcasting Directive on time. The authorities have taken no action to date.

The new campaign is backed by data. In a 2021 survey by Filmautor and Gallup International, 75% of respondents say they are unable to negotiate remuneration except for a first lump sum payment; 95% of respondents say

collective management provides them with better protection of their rights. Many prominent artists also support ARTS, calling for urgent measures from the government in a powerful video. ■

|| *We are creating music and movies in spite of the imbalances in relations between participants in the creative environment.*

|| **Victor Bozhinov,**
Film director and Chairman
of the Board of Filmautor

|| *The purpose of ARTS is the implementation of a well-focused and purpose-oriented state policy that reflects the rights and interests of all parties in the creative industry.*

|| **Ivan Dimitrov,**
CEO of Musicautor

SOCIETY CASE STUDY



Cesar Cuadra,
Director General of ATN



TRANSFORMING CHILE'S NEW REMUNERATION RIGHT INTO ROYALTIES FOR AUDIOVISUAL CREATORS

In 2016, Chilean society ATN was part of a historic legislative success, securing an unwaivable right to remuneration for audiovisual creators. Following that victory, ATN has played the leading role in ensuring this right is enforced in practice and paying royalties to its members.

As a result of the society's work, ATN reported collections for the first time in 2021, totalling EUR670k for its member audiovisual creators.

Chile's famous Ricardo Larraín Law (No. 20.959) was signed into law in 2016, establishing a non-transferable and inalienable right to remuneration for audiovisual directors and screenwriters.

Securing the law was one thing, but enforcing it was another, and ATN had to take a series of actions to ensure the new right is respected and complied with.

The first step was to develop a modern and objective tariff system. This was commissioned to the University of

Chile's Faculty of Economics and Business. Using the parameters of intensity of use and breadth of repertoire, the tariff system enables fair and adequate rates for users required to pay.

Based on these tariffs, an intense negotiation took place between ATN and user organisations, also taking into account the spirit of Chilean intellectual property legislation, which encourages compromise between the two sides. Eventually on 11 October 2019 a tariff agreement with the pay TV guild (Acceso TV) was reached that effectively translated the Ricardo Larraín Law into commercial reality.

This agreement was not the end of the story, however. ATN then faced several legal challenges from free-to-air TV operators, promoted by employee unions. These were overcome with resounding success, and favourable resolutions were obtained both in the Tribunal de Defensa de la Libre Competencia—endorsed by the Supreme Court of Justice—and before the Constitutional Court.

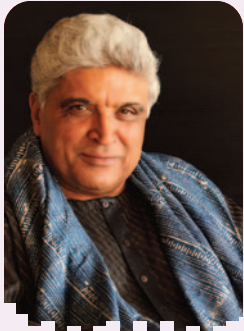


These judicial successes reinforce the legitimacy of the tariff system in the face of continuing resistance from the main free-to-air TV channels in Chile. The system is now the basis for other civil lawsuits initiated by ATN against those channels. ■

It is extremely satisfying that ATN has played such a key role in enabling audiovisual authors to share in the success of their works through its collective management. This is what motivates ATN in building respect for this new right for which we fought for so many years.

Cesar Cuadra,
Director General
of ATN

SOCIETY CASE STUDY



Javed Akhtar,
Chairman of IPRS



INDIA: IPRS DELIVERS BIG INCREASE IN ROYALTIES AND COVID HELP



Indian music society IPRS played a vital role in supporting members through a COVID crisis that brought a sudden end to live shows, concerts, filming and on-ground events.

Thankfully, new income-generating opportunities emerged as digital music consumption went up, helping IPRS grow revenues by +82% to INR3,000 million (US\$40 million) in 2021. Introducing a monthly royalty payment cycle against the earlier quarterly, the IPRS recorded its highest single-year royalty payout amounting to Rs.2,100 million (US\$28 million), up +15% in 2020.

Additional emergency relief funds were released to members. Through its Member Welfare Initiative, IPRS paid out Rs.97 million (US\$1.3 million) in multiple tranches from April 2020 to March 2022, and also provided funding for the medical needs of ailing members.

Undertaking multiple beneficial initiatives for its members, IPRS conducted pan-India workshops, online training, webinars and empowerment programmes on the latest

technology/trends shaping careers. Awareness-building initiatives for membership enrolment led to a 30% jump in new member registrations in 2021–2022.

On the technology front, the IPRS launched its new members portal, powered by BackOffice, thus empowering members to check their data and work and share related queries from a one-point source, thereby increasing transparency.

Despite strong collections growth, IPRS continues to face licensing challenges, with many major users, including homegrown OTT players, major broadcasters and radio stations, refusing to pay for the use of music. Inefficiencies get triggered due to insufficient data provided by the Indian broadcast industry hampering the collection and distribution of royalties.

Javed Akhtar, Chairman of IPRS, comments, “*The IPRS, apart from supporting its 3,900 members with emergency relief funds, also contributed to the upkeep of many from the creator community who weren’t our members then. Many*

of our well-heeled members emerged to wholeheartedly absorb the financial botheration of financially-hit creators. It was the moment we transcended the horizon and became a resplendent example of humanity and brotherhood for the world to emulate. After all, at the root of all creation are the indelible marks of compassion and solidarity.” ■

|| *As IPRS, we’ve not only managed to absorb the hard knocks of the pandemic but have also provided financial succour to many of our beleaguered members with a jump of 82% in revenue. It was possible due to our ability to do the needful in the time of a calamity, and our team led by CEO Mr. Rakesh Nigam at IPRS deserves special mention for this.*

Javed Akhtar,
Chairman of
IPRS

SOCIETY CASE STUDY



Jotam Matariro,
CEO of CAPASSO



CAPASSO DEVELOPS ITS REGIONAL LICENSING HUB AND IMPROVES SERVICES



CAPASSO is a South Africa-based Digital Rights Licensing Agency that collects and distributes royalties for members and has been at the forefront of educating direct and indirect members, publishers and 25 African partner CMOs.

The society has made great strides over the last six years, growing its membership to 9,143 in total, comprising 7,540 authors and composers and 1,603 publishers. CAPASSO represents directly and indirectly over 7 million works for its members.

CAPASSO operates a regional Licensing Hub that has signed and obtained licensing agreements with major global DSPs including Apple, Spotify, YouTube, TikTok, Deezer, Boomplay and Tidal. It is also setting up one of the first regional video on demand licensing hubs.

Efficient and transparent distributions are key to CAPASSO's mission. Despite the challenges posed by the COVID-19 outbreak, the CMO continued to run four distributions

annually. During lockdown, a R2 million CAPASSO Relief Fund was set up to help members seeking financial aid.

On the systems front, in September 2021 CAPASSO launched an online portal which increases the speed and efficiency of works notification, a process that was previously done manually. The upgrade also improves member registration and other services.

CAPASSO provided virtual and physical training in the use of its portal to sister CMOs COSOTA and NASCAM, increasing works submissions and, in turn, the remuneration of creators.

CAPASSO works to educate members about creators' rights and the value of society membership. A recent collaboration on a free workshop with one of the country's biggest DJs and producers, Shimza, drew 300 attendees. ■

|| *We pride ourselves in what we do, from obtaining licences to maximising member royalties, to educating creatives. When Covid-19 broke out, creators were one of the first sectors that were hard hit and the last to be opened as they make a living from performing for supporters. However, the rise of streaming proved to be positive as this also increased our collection of royalties. Knowledge is power and we live by this saying.*

|| **Jotam Matariro,**
CEO of CAPASSO

SOCIETY CASE STUDY



Gorm Arildsen,
CEO of Koda



KODA'S AMBITIONS AND RESPONSIBILITY FOR THE WORLD AROUND US



Even though the COVID pandemic continued to cause significant financial losses for Koda, the organisation achieved an excellent financial result for 2021 with a turnover of EUR138m, which is on a par with 2020.

Koda aims to be among the world's best collective rights management societies five and ten years from now. It has an excellent starting point—Koda's management practices was judged "best in class" according to CISAC's compliance review of Koda in 2019. To build on this success, the society is now focused on resolving key challenges concerning metadata, new business models, new technologies and, not least, sustainability.

In 2021, Koda for the first time started to integrate sustainability into its core business. This started with an assessment of how the society could respond to challenges to sustainable development described by the UN Sustainable Development Goals (SDGs).

The aim is to engage in sustainable business development that aligns with the SDGs' economic, social and environmental aspects. This includes both the internal and external aspects: how Koda as a business can be sustainable on all parameters; and how the music industry in Denmark and globally can fulfil its role in implementing the SDGs.

Koda's membership grew by 1,547 to 48,799 in 2021, comprising creators and publishers. The society conducted a major qualitative membership survey during the year, the objective being to better understand the needs of members now and in the future. The survey showed general satisfaction with Koda, and the results serve as input for Koda's upcoming business strategy.

On the advocacy front, faced with a new draft bill which seeks to impose VAT on Koda activities, the society has lobbied hard on behalf of its members to remain exempt from VAT and for the exemption to extend to CMOs and similar organisations that manage collective rights. ■

We see partnerships and data as key enablers to ensure impact for Koda and the industry. Cross-sector partnerships and collaborations are crucial to tackling some of the industry's systemic challenges of sustainable growth and gender diversity.

Gorm Arildsen,
CEO of Koda

SOCIETY CASE STUDY



Jennifer Brown,
CEO of SOCAN

SOCAN

music. people. **connected.**
musique. monde. **connectés.**

A SHARPENED FOCUS ON DELIVERING TO MEMBERS



In 2021, SOCAN continued to realize new records in collections and distributions, including CAD\$416 million in total collections (a +6% increase over 2020), total distributions to members and clients of CAD\$353 million, and digital collections increasing +30% to CAD\$135 million.

To build on this success, SOCAN used the last two years to sharpen its focus on its core business of serving our members. The company divested its ownership in for-profit companies and going forward will be guided by four strategic pillars:

- **Member-centric:** All actions by SOCAN must be to the benefit of its 180,000+ member/client songwriters, composers, and music publishers.
- **Maximise royalties:** finding, collecting, matching, and distributing more royalties faster and more accurately, and ensuring that effective technology tools and people are in place to support this.
- **Revolutionise service:** SOCAN aims to provide the best quality of service to its members and stakeholders.

- **People and partners:** providing SOCAN's nearly 280 employees with the workplace, tools, information, and training to excel. SOCAN is also working to optimise more partnerships and collaboration within the Canadian music industry.

Concrete reforms are delivering on these guiding tenets. A distinct strategic team of reproduction rights experts was created early in 2021 to bring dedicated expertise to all levels of the company. Among many achievements, the team expedited first payments from the newly-formed MLC (Mechanical Licensing Collective) in the United States.

SOCAN's royalty collections area executed new agreements with a variety of digital service platforms in the fields of fitness, audiovisual (onscreen) productions and online concerts, to benefit members. Royalty collections was also part of a re-organisation effort, bringing greater member-oriented focus to roles and employees, and working as a complete, united group on royalty collections, services and operations.

With members continuing to shift their performances online in 2021, SOCAN maintained its *Encore!* program, which quickly distributed approximately CAD\$200,000 each quarter to eligible online concerts with royalties of CAD\$150 per concert. ■

|| Today, more than ever before, SOCAN is a member-centric organisation, committed to service excellence, working in partnership with our staff and stakeholders to maximise rights and royalties, and striving to exceed expectations at every turn. A year of strategic development and sharpened focus on our core business has put our members at the heart of every decision, large and small.

|| Jennifer Brown,
CEO of SOCAN



REPertoire MUSIC

€8,483m
+7.2%

GLOBAL MUSIC COLLECTIONS UP +7.2% IN 2021

Royalties earned by music creators grew by +7.2% to EUR8.48bn in 2021, reversing the previous year's -11.5% decline. By far the largest source of growth was from digital which for the first time exceeded EUR3bn globally.

Overall, music collections in 2021 remained -5.1% below the pre-COVID levels of 2019.

Digital income growth of +27.5% was almost double the previous year, with digital collections rising +48.2% above the pre-pandemic level. Digital now makes up more than one-third of all global music revenue at 36.1% of the total – a fast-rising share but still reflecting a low level of return to creators on digital networks.

Top 10 collecting countries¹ (EUR million)

Country	Collections	Growth
UNITED STATES	2,004	+3.5%
FRANCE	951	+5.4%
JAPAN	818	-2.8% (+3.6% JPY)
UNITED KINGDOM	813	+33.1%
GERMANY	766	+4.0%
ITALY	308	-0.2%
CANADA	268	+14.0%
AUSTRALIA	264	+9.1%
SOUTH KOREA	201	+16.0%
SPAIN	199	+26.6%

¹) CISAC 2021 data excludes US digital mechanical rights income. 2020 is therefore re-stated to show like-for-like comparison.

Music collections by region (EUR billion)

Region	Collections	Share	Growth
EUROPE	4.33	51.1%	+10.4%
CANADA-USA	2.27	26.8%	+4.6%
ASIA-PACIFIC	1.47	17.4%	+4.0%
LATIN AMERICA	0.33	3.9%	-2.1%
AFRICA	0.07	0.8%	+17.5%

STREAMING GROWTH DRIVES DIGITAL

The continuing surge in subscription and ad-funded streaming, especially video on demand, has driven this exceptional digital growth.

Digital is now the primary source of music creators' income in more than 29 countries, helped by a subscriber growth, a widening choice of platforms and new licensing deals and new formats. Among these, TikTok was particularly impactful with proliferating demand for its shortform video format. Asia-Pacific markets are driving high rates of digital collections, especially in many smaller markets such as Vietnam, Indonesia, Hong Kong, Thailand and the Philippines.

Digital collection champions (EUR million)

Country	Collections	Digital	Share
MEXICO	92	63	68.5%
SWEDEN	133	78	58.7%
AUSTRALIA	264	153	57.9%
CHINA	54	29	54.3%
CANADA	268	143	53.4%
SOUTH KOREA	201	101	50.5%
UNITED KINGDOM	813	400	49.1%

BROADCAST INCOME DECLINES DESPITE SUCCESSFUL DEALS

Earnings from TV and radio remain the largest income source although its share difference over digital, in second place, has narrowed from 10.8% in 2020 to just 1.6% in 2021. Global broadcast collections fell by -1.8%, with weaker advertising rates in some markets translating into lower revenues. Digital is also substituting for broadcast income, although there was notable growth in some countries. In Mexico, broadcast collections rose +47.8% with the conclusion of a judicial process that generated a significant royalty back-payment from the satellite broadcaster, SKY.

In Spain, broadcast income rose +47.6% following agreements signed by SGAE with the main private TV networks. The country's advertising revenues were also up in 2021 but still well below the pre-pandemic level.

TWO-YEAR PANDEMIC CUT LIVE INCOME BY -73%

Total live and public performance royalties were flat (+0.2%) at EUR1.49bn in 2021, following a -45.2% decline the previous year. The two-year slump reversed more than a decade of sustained strong growth in the live, theatre, exhibition and general licensing sector. For historical context, the sector’s collections in 2021 were substantially below the EUR1.9bn recorded 15 years ago in 2007. Strong growth is expected for 2022 in many markets though some societies still believe a full recovery won’t be possible before 2023.

A breakdown of the numbers shows the marked disparity in live income compared to public performance. Data from around two-thirds of CISAC members shows that while background music recovered +17% in 2021 on top of a -39.9% fall in 2020, live music royalties remained in freefall. Live income shrank by -29.4% in 2021 following a -61.1% fall the previous year. This left income from concerts and festivals in 2021 -73% down on the 2019 level.

The path back to pre-pandemic levels has varied across the world, affected by variations in government measures. In Brazil and Poland, income continued to decline in 2021 and ended the year down by more than two-thirds versus 2019. Australia, which like other markets saw more generous government support in 2020 than in 2021,

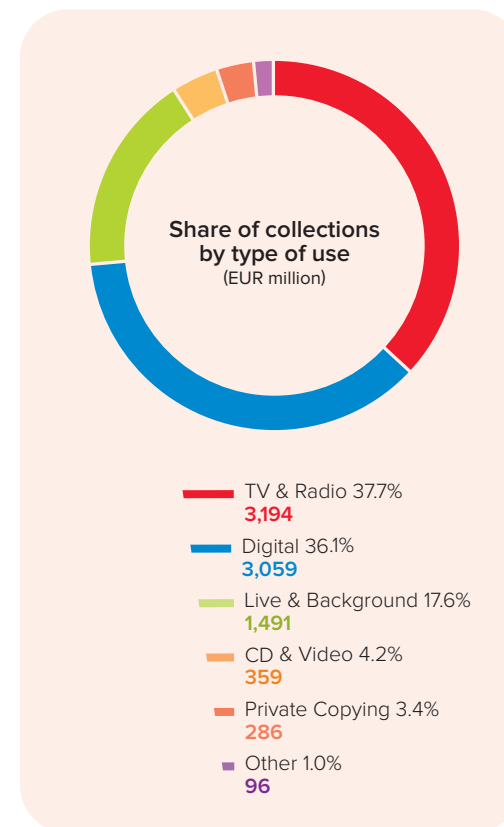
remained at half its pre-pandemic level. By contrast, the UK and USA saw significant growth in 2021 and added almost EUR90m to the sector as public performance income benefitted from reopening businesses.

OTHER INCOME SOURCES DECLINE

Private copying income collected from the levy placed on the purchase of recordable media and devices with storage capacity, is an important source of remuneration for creators. Private copying proceeds fell by -15.3%, largely due to the significant back-payments received the previous year. The 2021 total remains more than one-fifth higher than before the pandemic. Revenues from CD and video grew a mere +3.1%.

Breakdown of music collections (EUR million)

Use	Collections	Growth
TV & Radio	3,194	-1.8%
Digital	3,059	+27.5%
Live & Background	1,491	+0.1%
CD & Video	359	+3.1%
Private Copying	286	-15.3%
Synchronisation	28	+6.9%
Rental/Public Lending	10	-16.4%
Publication	6	+6.2%
Reprography	3	+38.0%
Other	46	+9.1%





REPertoire

AUDIOVISUAL

€ **608** m
-2.8%

DIGITAL INCOME LEAPS WHERE CREATORS HAVE THE RIGHTS

Global collections for audiovisual creators fell by -2.8% to reach EUR608m in 2021. The decline followed an exceptional back payment the previous year (2020) for private copying, which, if discounted, would have led to overall collections growth in 2021 of +3.4%. Collections are well below pre-pandemic levels (-2.8% vs 2019) but growth is expected in 2022.

Broadcast royalties are substantially the largest source of income received by audiovisual creators, with EUR411m collected representing 67.5% of total collections. Earnings from live and background use recovered slightly from the disastrous impact of the pandemic in 2020, growing by +12.8% in 2021 after near halving the previous year.

Digital revenues were once again the fastest-growing income source, increasing by one-third (+34.5%) in 2021 and showing growth of +86.7% over the two-year pandemic period. Despite this, royalties from digital sources remain a small share (7.3%) of the income of audiovisual creators, largely because of the very limited number of countries providing the necessary legal regime to require royalty payments.

Audiovisual creators – typically screenwriters and directors – receive royalties only in countries such as Spain, Poland, France and Italy where they are typically granted in law an unwaivable right of remuneration. The right has been recently introduced in Colombia, Chile, Uruguay and Panama, countries which are now collecting income for members.

Top 10 collecting countries (EUR million)

Country	Collections	Growth
FRANCE	232	-0.7%
SWITZERLAND	53	+3.3%
ITALY	52	+1.8%
SPAIN	37	-5.4%
POLAND	30	+13.8%
ARGENTINA	23	-19.6%
NETHERLANDS	23	+35.1%
GERMANY	17	-64.0%
UNITED KINGDOM	16	+18.6%
BELGIUM	14	+13.5%

Case studies on the impact of the remuneration right in four markets (Italy, Spain, Poland, Latin America), published by CISAC with sister bodies SAA and W&DW in 2021–22, have demonstrated its positive contribution to the economic and cultural success of the national audiovisual industry.

Chilean society ATN achieved its first year of collections (EUR671k) in 2021 after successfully defending legal challenges to the new unwaivable right introduced by the 2016 Ricardo Larraín Law (see details page 18).

Audiovisual creators elsewhere in Latin America saw an increase in local currency royalties during 2021. In the five countries where an audiovisual remuneration right exists, the highest percentage growth was in Uruguay. Argentina remained by far the largest market with three-quarters of the regional total.

AUDIOVISUAL

DIGITAL INCREASES SHARPLY IN FRANCE, SPAIN

Digital income rose in Spain during the pandemic, divided between two societies, DAMA and SGAE. DAMA reported royalties from TV operators at EUR12.9m, more than half its total collections of EUR22m. Revenues from SVOD services jumped +43% while cinema royalties collapsed by -44.8% due to lockdown restrictions. Recovery is expected in 2022, however.

Audiovisual collections in France, the largest collecting country, fell slightly due to a -5.5% decline in broadcast revenues. This was largely offset by strong growth in digital, which grew +41.9% during the year and ended at nearly double the pre-pandemic level. Digital income was boosted by a new retro-active agreement with Disney+. French society SACD also reported the signing of a further deal with YouTube that will begin to generate income in 2022.

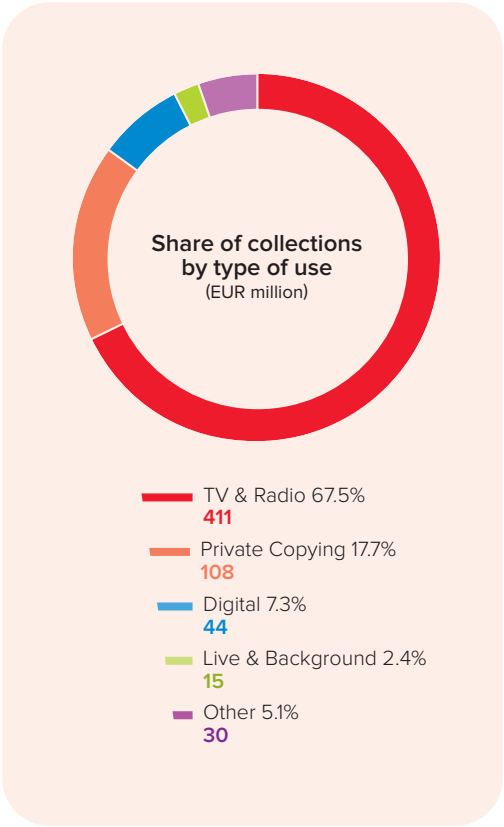
STRONG GROWTH IN POLAND

Audiovisual collections in Poland increased by +13.8%, contributing EUR30m to the global total in 2021. Local society ZAPA was able to operate without any restrictions in the second year of the pandemic and recorded the highest revenues in the organisation’s history. Public performance revenues rose by +82.7%, helped by the successful receipt of arrears from multi-screen cinemas.

Broadcast and digital uses also saw growth. For the first time, revenues were collected for local creators from the use of their work on foreign VOD services, boosting the sector total.

Breakdown of audiovisual collections (EUR million)

Use	Collections	Growth
TV & Radio	411	+0.3%
Private Copying	108	-23.7%
Digital	44	+34.5%
Live & Background	15	+12.8%
Educational Use	5	+5.6%
Mechanical Reproduction	1	+56.1%
Rental/Public Lending	0.9	-8.9%
Reprography	0.3	-32.3%
Other	23	+7.6%





REPERTOIRE

VISUAL ARTS

€196 m
-1.2%

RESALE RIGHT AND DIGITAL HELP DRIVE RECOVERY

Collections in the visual arts repertoire declined by -1.2% in 2021 to EUR196m, but the total still remained +18.3% above the pre-pandemic level. This sector is typically affected by back payments and the annual decrease is largely explained by an exceptional retroactive payment of EUR71m in reprography in 2020.

Reprography is the largest collectively-managed royalty source for visual artists, generating income from the sale of photocopiers and printers. It accounts for 25.6% of total collections. Excluding this type of use from the total, visual arts income increased by +15.1% during the year, reflecting less severe lockdown restrictions and a recovery in the art market.

France, Germany and the UK remain the top collecting nations, with the latter growing fastest at +15.2%. There was also strong growth in the US (+30.2%), Sweden (+10.4%) and Italy (+12.2%).

Top 10 collecting countries (EUR million)

Country	Collections	Growth
FRANCE	44	+3.0%
GERMANY	41	-18.8%
UNITED KINGDOM	22	+15.2%
NETHERLANDS	14	-23.9%
SWEDEN	13	+10.4%
ITALY	10	+12.2%
DENMARK	8	-2.6%
UNITED STATES	7	+30.2%
BELGIUM	6.6	+0.5%
FINLAND	6	-5.4%

Visual arts collections by region (EUR million)

Region	Collections	Growth
EUROPE	181	-3.5%
CANADA-USA	7.4	+29.2%
ASIA-PACIFIC	6.7	+62.8%
LATIN AMERICA	0.3	+12.0%
AFRICA	0.02	+17.4%

RESALE RIGHT RECOVERS TO PRE-PANDEMIC LEVEL

Income from the artists resale right grew by +23% in 2021, to more than reverse the decline seen the previous year. The resale right is a small royalty paid to the artist when their work is resold at auction. In 2020, resale right income fell by -18% as a result of the temporary closure of galleries and auction houses.

Some auctions during the pandemic were moved online to mitigate its impact, and this combined with the easing of restrictions in many of the largest art markets to help restore resale right revenues to slightly above the pre-pandemic level. The UK and France remained the primary contributors at 30.3% and 25.5% of the global total respectively but eight of the top ten collecting countries saw resale right growth. DACS in the UK said the resale right market had improved in 2021 with “art market professionals finding ways to operate under less restrictive lockdown conditions”.

CISAC continues to work with governments and WIPO to encourage a universal adoption of the resale right, which currently exists in the legislation of around 80 countries, granting artists a fair and lifelong association with their works and benefitting artists of all signatory countries via reciprocal agreements.

DIGITAL COLLECTIONS MORE THAN DOUBLE

Digital revenues for visual arts are generated when artists' work is used online in e-Books, websites or mobile apps.

In 2021, collections from this source more than doubled to reach EUR15.2m. Overall, digital collections for visual arts are now more than two and a half times the pre-pandemic level. The largest increase in 2021 came in Germany which tripled due to a one-off payment (including for past years) related to the use from intranet in universities and schools. Digital collections in France, a major contributor, more than doubled, attributed by French society ADAGP to new agreements with digital platforms.

PRIVATE COPYING AND REPRODUCTION FEES

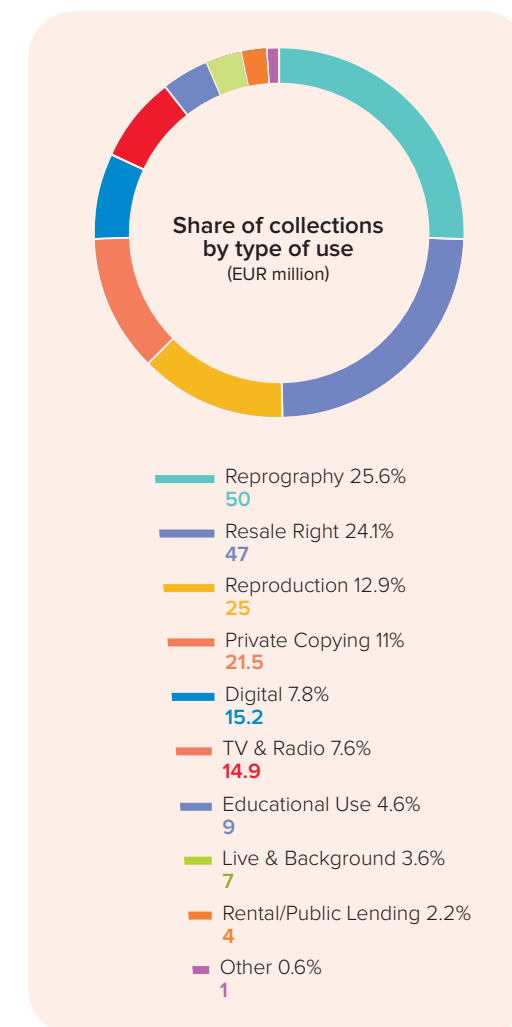
Private copy collections, the fourth ranked income stream for visual arts, were -22.3% lower than the previous year following a +75.5% increase in 2020. Reproduction fees from the use of visual art in books and magazines rose +21.8%.

Breakdown of visual arts collections (EUR million)

Use	Collections	Growth
Reprography	50	-29.9%
Resale Right	47	+23.0%
Reproduction	25	+21.8%
Private Copying	21.5	-22.3%
Digital	15.2	+140.2%
TV & Radio	14.9	-2.1%
Educational Use	9	+33.5%
Live & Background	7	+6.8%
Rental/Public Lending	4	-2.7%
Other	1	+208.5%

Resale right: top 10 collecting countries (EUR million)

Country	Collections	Growth
UNITED KINGDOM	14	+15.2%
FRANCE	12	+42.6%
ITALY	6	+13.6%
GERMANY	5	+49.7%
SWEDEN	1.8	+1.8%
BELGIUM	1.5	+14.9%
AUSTRIA	1.1	+52.4%
AUSTRALIA	0.9	+38.3%
CZECH REPUBLIC	0.8	-4.9%
DENMARK	0.8	-29.4%





REPERTOIRE

DRAMA

€ **89** m
-13.8%

REVENUE DECLINE SLOWS AS LOCKDOWNS LIFT

The drop in dramatic repertoire collections slowed in 2021, but income still fell by -13.8% to reach EUR89m. As the shutdown of theatres and public events ran well into a second year, following a -44.4% decline in 2020, revenue from the use of dramatic works ended 2021 below half its pre-pandemic level.

More than 70% of dramatic royalty income derives from public performance, making the repertoire highly vulnerable to lockdown restrictions. Collections here fell between three and four times more than any other repertoire during the two years of the pandemic.

Among the top five collecting countries, only Spain and Argentina saw growth (+20.8% and +204.4%, respectively), following -48.5% and -86.5% drops in 2020. This was attributed by SGAE and Argentores to the progressive lifting of restrictions and the increase in permitted capacities for shows.

BROADCAST REVENUES RECOVERING

Broadcast royalties only slightly compensated for the losses. Following an increase of +5.4% during the year, the share of income from TV and radio grew from 17.9%

to 21.8% of the sector total. There was +6.2% growth in Italy, helping limit the overall decline. Some of the smaller collecting countries also performed well with a +40.1% rise in Portugal, +65.9% in Lithuania and a doubling of collections in Latvia.

FALLS IN MAJOR MARKETS

Almost two-thirds of drama royalty income is generated in Italy and France with those countries showing declines of -14.6% and -17.9% respectively. These drops were gentler, however, than the previous year's slide of -31.2% and -51.8%. In Belgium and Poland, there were sharp falls, with collections in each decreasing by around one half.

Top 5 collecting countries (EUR million)

Country	Collections	Growth
ITALY	36	-14.6%
FRANCE	23	-17.9%
SPAIN	71	+20.8%
SWITZERLAND	7	-20.3%
ARGENTINA	3	+204.4%

Breakdown of drama collections (EUR million)

Use	Collections	Growth
Live & Background	64	-19.1%
TV & Radio	19.5	+5.4%
Private Copying	4	+5.9%
Digital	0.3	+6.4%
Rental/Public Lending	0.2	-67.6%
Mechanical Reproduction	0.1	-11.5%
Other	0.9	+6.2%



REPertoire

LITERATURE

€ **199** m
-3.9%

REVENUES END 2021 ABOVE PRE-PANDEMIC LEVEL

Collections on behalf of literary authors fell by -3.9% in 2021 and, as usual, were heavily affected by irregular multi-year payments. Because of this, and despite the annual fall, royalties for the repertoire total ended at +1.1% above their 2019 level.

More than 80% of literary earnings come from reprography and are derived from the use of literary work in printed publications. In 2020, significant back payments increased revenues in this sector by +5.9%, which in turn led to a -5.2% decrease the following year.

Income from private copying rose +2.1%, boosted by the addition of Lithuania, where authors received income from this levy for the first time. This followed a -15.9% decline the previous year.

GROWTH IN SMALLER COLLECTING COUNTRIES

Australia and the UK remain the largest collectors for literature, with 38.5% and 16.0% of the global total respectively. Income in Australia decreased -5.2%, while UK revenues grew +8.3%. Finland regained its third place, and the Netherlands dropped by -26.4% following a near-trebling of collections the previous year. Of the

smaller collecting countries, Slovakia and Portugal grew by +22.7% and +49.7% while Lithuania's total more than doubled.

DIGITAL GROWTH OUTPERFORMS OTHER SECTORS IN THE NETHERLANDS

Digital royalties are collected only in the Netherlands, Czech Republic and Latvia and so make up just 1.7% of the literary total. In 2021 however, this figure grew by +35.1% and has more than trebled since 2019. Digital now makes up almost 15% of the Netherlands' collections with the majority coming from E-Lending of literary works.

Income from more regular forms of rental and public lending decreased by -1% but still comprised 10.1% of the global literary repertoire total.

Top 5 collecting countries (EUR million)

Country	Collections	Growth
AUSTRALIA	77	-5.2%
UNITED KINGDOM	32	+8.3%
FINLAND	21	+0.6%
NETHERLANDS	17.2	-26.4%
SWITZERLAND	16.8	-5.5%

Breakdown of literary collections (EUR million)

Use	Collections	Growth
Reprography	160	-5.2%
Rental/Public Lending	20	-1.1%
Private Copying	4.7	+2.1%
Educational Use	4.5	+8.0%
Digital	3.3	+35.1%
TV & Radio	3	-17.9%
Mechanical Reproduction	1.4	+15.9%
Live & Background	1.1	-11.1%
Other	1.4	+34.0%

REGION EUROPE

€5,290m
+7.5%



PANDEMIC LIMITS COLLECTIONS RECOVERY

Collections on behalf of creators in Europe recovered by **+7.5% in 2021** but remained -7.7% below the pre-pandemic level of 2019. The ongoing effects of lockdown continued to restrict live and public performance but digital income helped offset the decline.

Total revenues in Italy and Poland continued to fall while Spain, Sweden and the UK saw growth helped by continued strong increases in digital income. Germany declined -1.3% due to a correction in private copying, which cut audiovisual and visual arts collections. In visual arts, the resale right grew due to strong performance in the UK (+15.2%) and France (+42.6%).

Europe remains the largest region for collections overall, with an unchanged 55.2% share of global collections.

Collections by repertoire, Europe (EUR million)

Repertoire	Collections	Growth
Music	4,334	+10.4%
Audiovisual	575	-2.2%
Visual Arts	181	-3.5%
Literary	115	-3.6%
Dramatic	85	-16.2%
Grand Total	5,290	+7.5%

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

Repertoire	Collections	Growth
Music	316	+2.8%
Audiovisual	84	+8.8%
Dramatic	8	-25.1%
Literary	7	+9.0%
Visual Arts	4	+9.6%
Grand Total	419	+3.4%

DIGITAL GROWTH RATE DOUBLES FROM 2020

Digital income generated almost all the growth in Europe, rising **+33.5% in 2021**, double the +14% increase of 2020. However, digital still represents barely more than one

quarter (27%) of all European collections, a reflection of the general undervaluation and poor returns for creators in the streaming environment.

Audio streaming fared well in 2021 as consumers returned to mobile listening (for example while commuting), and there was continued strong growth in video streaming, boosted by lockdown.

Countries with a high digital share of income, such as those in Scandinavia, were again able to better weather the continued pandemic effects. The largest digital growth was in the UK, where SVOD revenues almost doubled from 2019 due to new and renewed licences for services such as Disney+, Apple TV and Netflix.

Digital collections rise (EUR million)

Country	Digital	Digital Share	Growth
UNITED KINGDOM	400	45.2%	+49.8%
FRANCE	392	31.4%	+16.4%
GERMANY	243	29.5%	+37.3%
SWEDEN	78	53.4%	+64.0%
ITALY	57	14.0%	+19.2%

BROADCAST MAINLY RESILIENT

TV and radio broadcast remains the largest revenue source in Europe. Income from broadcast uses in 2021 rose +3.8% compared to a -4.6% fall in 2020, and accounted for a 37.7% share of total collections. The result was helped by generally resilient advertising spending and by a contract signed with Vodafone in Germany that released back payments from previous years. The largest decrease came in France which declined by -3.5% in 2021 after a similar fall in 2020.

LIVE AND PUBLIC PERFORMANCE SLOW TO RECOVER

Income from live and background uses rose +3.2% in 2021, barely recovering from the disastrous -49.6% fall in Europe the previous year. The continuation of lockdown restrictions left collections below half of pre-pandemic levels at just over EUR1bn.

The UK was by far the fastest growing country in this sector with collections recovering +65.2% but remaining one-third below the pre-pandemic total. PRS for Music reported an optimistic outlook for 2022 with over 240 major tours already planned throughout the UK and beyond. Israel, Belgium and Spain also saw growth.

AUDIOVISUAL COLLECTIONS DECLINE

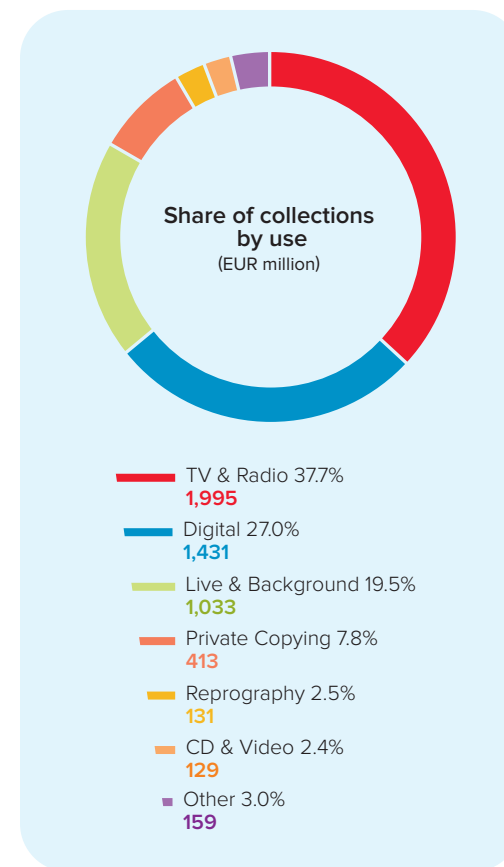
European collections from the audiovisual repertoire fell -2.2%, largely reflecting a large back payment in Germany the previous year. In France, collections were virtually flat but the country still contributed more than a third of the European total. Strong increases came in the Netherlands, Czech Republic and Greece.

SLOWER RECOVERY IN EASTERN EUROPE

Collections in Eastern Europe recovered by +3.4% in 2021. The largest challenge remained the live and background sector which fell a further -6.7% and is now nearly half its 2019 level. TV & radio, which had grown by +3.2% in 2020, grew only +1.5% as the region continued to be plagued by poor rates and resistance from broadcasters. Only digital grew significantly at +52.2%, but from a low base, driven mainly by Turkey, Hungary, Poland and Czech Republic.

Breakdown of collections by type of use (EUR million)

Use	Collections	Growth
TV & Radio	1,995	+3.7%
Digital	1,431	+33.5%
Live & Background	1,033	+3.2%
Private Copying	413	-18.1%
Reprography	131	-16.7%
CD & Video	129	+4.9%
Resale Right	46	+22.7%
Rental/Public Lending	31	-0.6%
Reproduction	15	+12.2%
Synchronisation	13	+3.1%
Educational Use	12	+16.6%
Mechanical Reproduction	3	+32.1%
Publication	0.03	+120.4%
Other	39	+9.6%



REGION

CANADA USA

€ **2,280**m
+4.7%

DIGITAL GROWTH LEADS COLLECTIONS RECOVERY

2021 has marked a semblance of return to normal business for North American CMOs after two years dominated by the impact of the COVID crisis. Collections rose +4.7% to EUR2.28bn. This calculation includes an adjustment of the 2020 total to account for the transfer of digital mechanical rights income in 2021 to the newly-created US Music Licensing Collective (MLC), which is not a CISAC member and therefore excluded from this Report.

Music accounted for the bulk of collections, with the remainder coming from visual arts at EUR7.4m, up +29.2%. The three main CISAC members in the region — ASCAP, BMI and SOCAN — all posted increased collections in 2021, and all three reported revenues at historic high levels. In Canada, SOCAN also posted a +36.1% year-on-year growth for the use of music on digital platforms, offsetting drops in live and public performance, which were still far from returning to pre-pandemic levels.



STRONG DIGITAL GROWTH

Some pressure in the public performance sector, due to the slow return of live events, was offset by continuing strong growth in digital revenues. **Digital revenues grew +26.8% to EUR871m in 2021, following +29.2% and +17.7% growth in 2019 and 2020 respectively.**

ASCAP said increases in collections from the audio streaming and audiovisual sectors helped grow domestic revenues to new records. BMI highlighted the “phenomenal growth in the digital sector”, with a total of 1.98 trillion performances processed during the year, up +13% from the previous year, of which 1.95 trillion were digital plays.

THE RISE OF OTT SERVICES

Revenues from the use of music on TV shows and films played on major ‘over-the-top’ (OTT) streaming services — such as Netflix, Hulu, Amazon, Apple TV+, Disney+ and HBO Max, among others — contributed to the good performance in the region.

Societies have consolidated and expanded licensing agreements with music users, from fitness brands to major streaming and OTT services. All societies reported a healthy level of licensing activity, reflecting the regular addition of new platforms.

BROADCAST INCOME UNDER PRESSURE

TV & radio remained the leading source of revenues in the region in 2021, at EUR1.10bn, but collections were down -8.7% year-on-year. Cable and satellite revenues were stable but those from broadcast radio and television are still short of pre-COVID levels.

Income from live and background uses rose +10.1% year-on-year to EUR268m, reflecting some recovery after the pandemic. However, live and public performance remain -29.9% below their 2019 levels.

DIGITAL MECHANICAL ROYALTIES

Mechanical collections changed in the US with the launch of the MLC on 1 January 2021 as the collective in charge of licensing and administering mechanical rights on digital platforms. Figures are not included in this report.

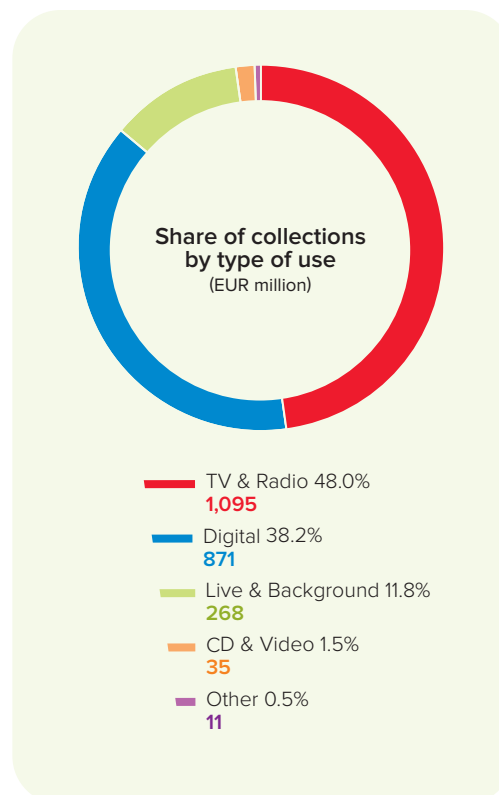
Mechanical revenues will benefit from the final decision from the Copyright Royalty Board to uphold the rates negotiated in 2018 that called for a 40% increase in mechanical rates for the period 2018–2022. The increase will now have to be paid retroactively by the DSPs, and will be accrued in the coming years.

Collections by repertoire (EUR million)

Repertoire	Collections	Growth
Music	2,273	+4.6%
Visual Arts	7.4	+29.2%
Audiovisual	0.03	-41.9%

Breakdown of collections by type of use (EUR million)

Use	Collections	Growth
TV & Radio	1,095	-8.7%
Digital	871	+26.8%
Live & Background	268	+10.1%
CD & Video	35	-9.0%
Reproduction	7	+30.9%
Synchronisation	3	-4.0%
Reprography	0.08	-21.6%
Other	0.8	-22.0%



REGION

ASIA-PACIFIC

€ **1,562** m
+3.7%



DIGITAL HELPS POWER RETURN TO GROWTH

Collections in the Asia-Pacific region grew by +3.7% in 2021, nearly reversing the -4% drop the previous year. Digital income was responsible for most of the growth, increasing by +19.2% to end the year +40.6% up on the 2019 pre-pandemic level.

Digital collections now account for 42.6% of the region's royalties, making Asia-Pacific the only region with digital as the largest royalty source. By contrast, TV and radio and live and background royalties, still under the influence of the COVID pandemic, declined -8.8% and -11.3% respectively. TV and radio revenues come under strong pressure due to powerful broadcasters seeking low rates.

Many of the region's smaller collecting countries performed exceptionally in 2021 due to high digital shares. In Thailand, for example, income grew by +68.8% and digital accounts for 89.5% of total collections.

Top 3 territories (EUR million)

Country/territory	Collections	Growth
JAPAN	819	-2.7% (+3.7% JPY)
AUSTRALIA	344	+5.7%
SOUTH KOREA	209	+15.8%

Collections by repertoire (EUR million)

Repertoire	Collections	Growth
Music	1,473	+4.0%
Literary	82	-4.4%
Visual Arts	7	+62.8%
Audiovisual	0.2	-17.6%

DIGITAL COLLECTIONS UP IN JAPAN

Japan is substantially the largest collecting country in the region at 52.4% of the total. Collections in 2021 grew +3.7% in local currency, but declined -2.7% when converted to euros.

For the first time, digital collections exceed one-third of the Japan total after increasing +7.3% in 2021. Music society JASRAC reported income growth of more than +20% from music subscriptions and SVOD, while revenue from video streaming on YouTube, Facebook and online concerts grew almost +15%.

Broadcast, however, suffered worse in 2021 than the first year of the pandemic as subscriptions to NHK, the local public broadcaster, decreased and advertising revenue continued to shift from terrestrial to digital services.

Income from live events and background music increased slightly in local currency. Concert performances recovered, but severe pandemic restrictions at the rescheduled Tokyo Olympics led to significant lost income.

REVENUES RESILIENT IN KOREA

Collections in Korea continued to buck global trends and rose +15.8% in 2021. Revenues are now more than one-quarter higher than in 2019 with digital up +53.2% over the two-year period. In addition to growth in video subscription driven by lockdown restrictions, a change in KOMCA's digital collection rules led to increased promotion of music subscriptions by the major music platforms.

Broadcast revenues remained nearly flat. Live and background collections declined -20.1% to end at nearly half the pre-pandemic level. The entertainment, club and karaoke sectors were designated high-risk facilities under government social distancing regulations and had to accommodate forced closures and shorter business hours. Cinema attendance levels in 2021 were reported as being at their lowest levels since 2004.

ASIA-PACIFIC

AUSTRALASIA: SLOW RETURN FOR LIVE

In Australia and New Zealand, income from live and public performance fell by -33% in both 2020 and 2021, and is now at less than half the 2019 level. A strict second lockdown in 2021 restricted the hospitality, fitness and night-club sectors, and forced the cancellation of concerts and theatrical events. Additionally, the largest live shows often feature foreign acts and due to the complexity of tour planning, most chose to postpone their tour plans. These are returning in 2022, but slowly.

Broadcast income grew by +3.6% with increase in advertising income. Digital collections continued to rise, +23% in 2021, helped by SVOD income growth and increased advertising revenues on some music services.

VISUAL ARTS COLLECTION RISE

Australasia is the region's only collector of the visual arts resale right, the levy placed on works of art when they are resold at auction. This saw a +38.3% increase in 2021. The Australian Copyright Agency reported that in the 11 years the scheme had been in place, around 2,200 local artists had benefitted from the resale right with 65% of them being of Aboriginal and Torres Strait Islander origin.

DIGITAL DRIVES SHARP GROWTH IN SMALL MARKETS

High digital shares have insulated some territories from losses through the pandemic. Collections in Indonesia are virtually all digital and grew +59.4%, +111% over 2019 levels.

More increases are expected as local society WAMI continues negotiations to collect for OTT video transmitted via the Internet. Collections in Malaysia grew by +31.3%.

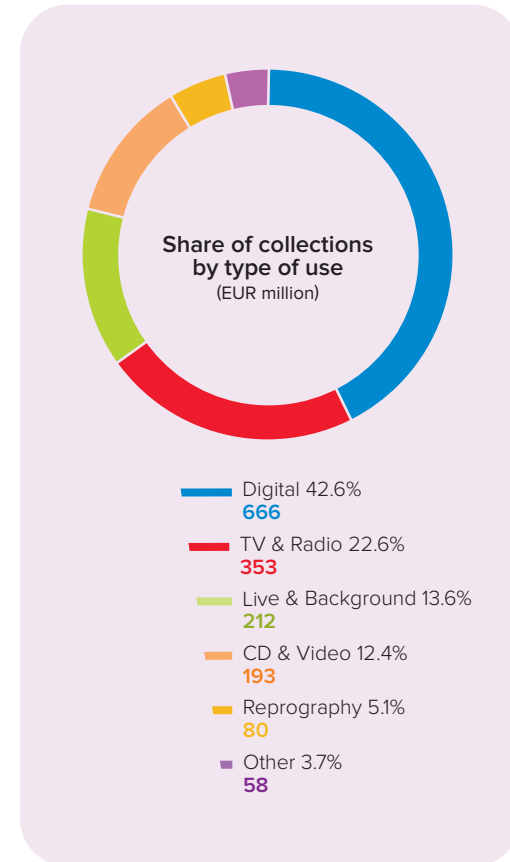
India's IPRS reported income up +77.6% over 2 years driven by a rapid growth of streaming.

Digital collections rise (EUR million)

Country/territory	Digital	Digital Share
JAPAN	289	35.2%
AUSTRALIA	153	44.6%
SOUTH KOREA	101	48.6%
CHINA	29.1	53.6%
INDIA	28.8	82.1%
HONG KONG	23	70.8%
THAILAND	11	89.5%
INDONESIA	7.5	98.2%
MALAYSIA	6.5	49.3%
TAIWAN, CHINESE TAIPEI	5	39.6%

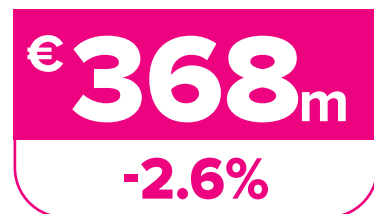
Breakdown of collections by type of use (EUR million)

Use	Collections	Growth
Digital	666	+19.1%
TV & Radio	353	-8.8%
Live & Background	212	-11.3%
CD & Video	193	+4.5%
Reprography	80	-3.9%
Educational Use	7	+17.9%
Publication	6	+5.9%
Synchronisation	5	+19.5%
Rental/Public Lending	4.9	-35.3%
Reproduction	2	+105.3%
Resale Right	0.9	+38.3%
Private Copying	0.03	-6.2%
Other	31	+11.9%



REGION

LATIN AMERICA & THE CARIBBEAN



DIGITAL COLLECTIONS UP +22% BUT PANDEMIC IMPEDES RECOVERY

Collections in Latin America and the Caribbean fell by EUR9.6m in 2021, a drop of -2.6% despite strong digital collections led by Brazil, Argentina and Mexico. At EUR368m, the regional total was around one-quarter (-27.3%) below its pre-pandemic level of 2019. This was the only region to record a decrease in collections in 2021. Fluctuating currency exchange rates had a big impact, especially in two major markets, Brazil and Argentina.

The largest decrease was in live and background income, down by -44.2% in 2021 and down almost three-quarters on the 2019 total. Live and public performance, traditionally a strong royalties sector in the region, has slumped dramatically as a share of total collections, decreasing from 38.3% to 13.9% between 2019 and 2021. A strong recovery is expected in 2022, however, with concerts, festivals, theatres and exhibitions sold out across the region.



TV and radio saw a small +2.7% increase in 2021 while digital revenues rose +22.2% during the year, helped by substantial increases in most markets, led outstandingly by Argentina.

Top 3 territories (EUR million)

Country	Collections	Growth	Growth (Local)
BRAZIL	115	-12.9%	-1.8%
MEXICO	97	+9.6%	+7.4%
ARGENTINA	77	-8.1%	+27.7%

Collections by repertoire (EUR million)

Repertoire	Collections	Growth
Music	334	-2.1%
Audiovisual	31	-12.9%
Dramatic	4	+123.9%
Visual Arts	0.3	+11.9%

MEXICO COLLECTIONS EXCEED ONE-QUARTER OF REGION

Collections in Mexico grew by +9.6% in 2021 and, for the first time, contributed more than one-quarter of the regional total. Following a +45.2% increase in digital in 2020, growth in this sector remained flat. Mexico's digital royalties still made up almost two-thirds of the national total.

In the broadcast sector, a significant back payment with satellite broadcaster SKY led to a +36.2% rise in TV and radio income. The country also saw growth in public performance as concerts, clubs and businesses reopened, leading to a +23.5% rise in revenue.

LATIN AMERICA & THE CARIBBEAN

BRAZIL DECLINES BUT RECOVERY SEEN IN 2022

Brazil's live and background collections were heavily impacted in 2021 for the second year running, falling by -52.3% after a -42.1% drop in 2020. The sector's royalties ended 2021 at less than a third of their pre-pandemic level. A member survey by music society UBC found that half the country's musicians had lost all of their income due to lockdown restrictions. Half of those were forced to find another professional activity.

A strong recovery is expected in 2022, however. Numerous national tours and large festivals such as Rock in Rio and Lollapalooza have been booked for 2022 with events selling out.

Brazil's digital collections grew by +12.4% and the predominant broadcast sector reversed the previous year's decline to rise by +1.1%.

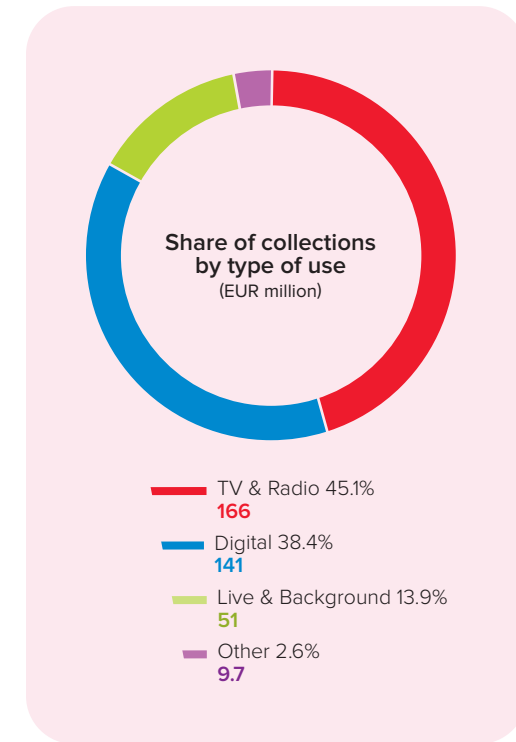
DIGITAL COLLECTIONS MORE THAN DOUBLE IN ARGENTINA

Revenues in Argentina grew by +27.7% in local currency, driven by new subscription video licence agreements including back payments, increased tariffs for some DSPs, organic growth in streaming subscriptions and income from live streaming of concerts.

By contrast, royalties from live and background accelerated their decline in 2021. The combined effect was to decrease the share of public performance income from 26.9% to just 8.5%. The share of broadcast collections remained consistent at a little over one-half of the national total.

Breakdown of collections by type of use (EUR million)

Use	Collections	Growth
TV & Radio	166	+2.7%
Digital	141	+22.2%
Live & Background	51	-44.2%
Synchronisation	7	+10.6%
Private Copying	1	+12.9%
CD & Video	0.6	+9.2%
Reproduction	0.2	-37.2%
Educational Use	0.1	0.0%
Resale Right	0.04	+25.3%
Publication	0.01	+24.0%
Other	0.1	+64.3%



REGION AFRICA

€ **75** m
+17.1%

AFRICA COLLECTIONS UP +17.1%, HELPED BY DIGITAL

Collections in the Africa region grew by +17.1% in 2021 to reach EUR75m, with growth in all repertoires. The total remains -6.4% below the pre-pandemic figure of 2019.

LIVE AND BACKGROUND INCOME STILL FACING CHALLENGES WITH SLOW RECOVERY

Live and public performance income grew by +3.1% in 2021 but remains more than one-quarter below the 2019 total. Lockdown regulations began to be slowly relaxed but continued to have an effect on the sector. Societies also reported a reluctance to attend live events amongst the public, even after restrictions eased. Kenya collections decreased by -43.9%. In Côte d'Ivoire, the local society BURIDA partnered with town halls, national institutions and larger umbrella users such as health centres and hotels to dramatically increase collections by +58.9%.

BROADCAST UP +19.1% AND LEADS COLLECTIONS

Royalties from broadcast TV and radio in Africa grew by +19.1%, making up more than 44% of the regional total. South Africa is substantially the largest collecting country, but a continued slowing of radio advertising cause a small drop in its income. TV and radio collections in Nigeria



however, grew more than four-fold following a licensing agreement between society MCSN and broadcaster Multichoice. Senegal also saw an increase due to a satellite settlement with Canal.

GROWTH IN DIGITAL

Digital collections increased by +68.9% to reach a four-year high of EUR12.7m. The largest contributor was South Africa, which saw digital revenue nearly doubling thanks to a joint CAPASSO/SAMRO licensing agreement facilitating the retrospective invoicing of Netflix, Facebook and Deezer. Elsewhere in the region, digital remains poorly represented and comprised just 16.9% of African collections. A few countries contributed modest digital income, led by Côte d'Ivoire and Mali.

Top 3 territories (EUR million)

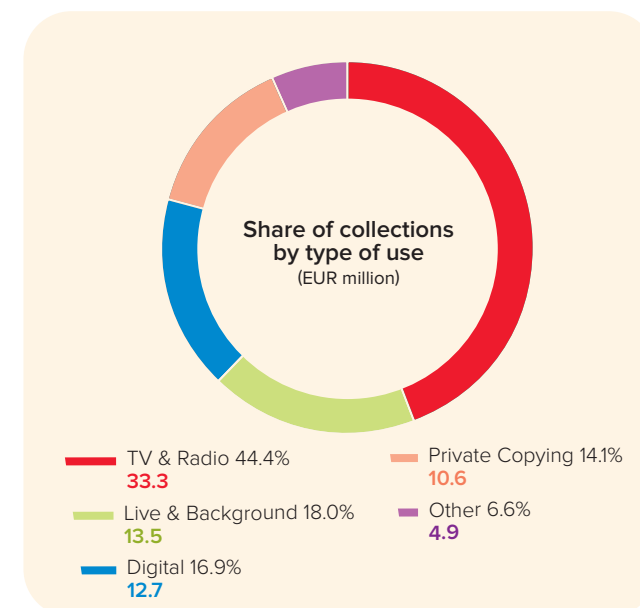
Country	Collections	Growth
SOUTH AFRICA	40	+9.4%
MOROCCO	7	-4.7%
CÔTE D'IVOIRE	6.5	+51.8%

Collections by repertoire (EUR million)

Repertoire	Collections	Growth
Music	69.7	+17.5%
Literary	3	+2.2%
Audiovisual	1.8	+28.2%
Dramatic	0.4	+15.6%
Visual Arts	0.02	+17.4%
Grand Total	75	

Breakdown of collections by type of use (EUR million)

Use	Collections	Growth
TV & Radio	33.3	+44.4%
Live & Background	13.5	+18.0%
Digital	12.7	+16.9%
Private Copying	10.6	+6.6%
Other	4.9	+1.7%



TABLES OF COLLECTIONS

ALL REPERTOIRES



COLLECTIONS FOR ALL REPERTOIRES IN EUR MILLION

RANK	COUNTRY/TERRITORY	COLLECTIONS	GROWTH	GLOBAL SHARE
1	UNITED STATES	2,011	+3.6%	21.0%
2	FRANCE	1,250	+3.6%	13.1%
3	UNITED KINGDOM	884	+31.2%	9.2%
4	GERMANY	824	-1.3%	8.6%
5	JAPAN	819	-2.7%	8.6%
6	ITALY	412	-1.2%	4.3%
7	AUSTRALIA	344	+5.7%	3.6%
8	CANADA	269	+14.0%	2.8%
9	SPAIN	249	+19.9%	2.6%
10	NETHERLANDS	241	-0.7%	2.5%
11	SOUTH KOREA	209	+15.8%	2.2%
12	SWITZERLAND	197	-0.7%	2.1%
13	SWEDEN	146.2	+20.4%	1.5%
14	DENMARK	145.8	+9.4%	1.5%
15	BELGIUM	116.2	+9.5%	1.2%
16	BRAZIL	115.3	-12.9%	1.2%
17	FINLAND	109.7	+4.8%	1.1%
18	MEXICO	97.4	+9.6%	1.0%
19	POLAND	96.7	-16.3%	1.0%
20	AUSTRIA	91.9	-6.4%	1.0%
21	ARGENTINA	76.9	-8.1%	0.8%
22	NORWAY	72.6	+32.7%	0.8%
23	CHINA	54.3	+13.9%	0.6%
24	CZECH REPUBLIC	52.0	+20.4%	0.5%
25	PORTUGAL	45.5	+11.3%	0.5%

RANK	COUNTRY/TERRITORY	COLLECTIONS	GROWTH	GLOBAL SHARE
26	ISRAEL	44.0	+4.6%	0.5%
27	SOUTH AFRICA	39.9	+9.4%	0.4%
28	HUNGARY	39.2	+13.2%	0.4%
29	INDIA	35.1	+73.8%	0.4%
30	HONG KONG	33.1	-1.3%	0.3%
31	ROMANIA	30.6	+9.4%	0.3%
32	CHILE	24.9	+26.9%	0.3%
33	COLOMBIA	21.9	+6.4%	0.2%
34	TURKEY	21.7	+37.1%	0.2%
35	IRELAND	18.6	+9.9%	0.2%
36	CROATIA	17.4	+8.5%	0.2%
37	GREECE	16.9	+47.9%	0.2%
38	SLOVENIA	16.1	+9.6%	0.2%
39	SERBIA	13.6	+8.3%	0.1%
40	SLOVAKIA	13.3	+4.8%	0.1%
41	MALAYSIA	13.0	+31.3%	0.1%
42	THAILAND	12.6	+68.8%	0.1%
43	TAIWAN, CHINESE TAIPEI	12.2	-14.1%	0.1%
44	PERU	12.1	+1.4%	0.1%
45	SINGAPORE	8.1	+5.9%	0.1%
46	INDONESIA	7.6	+59.4%	0.1%
47	LITHUANIA	7.5	+17.1%	0.1%
48	MOROCCO	7.0	-4.7%	0.1%
49	ESTONIA	6.6	+9.6%	0.1%
50	CÔTE D'IVOIRE	6.5	+51.8%	0.1%



TABLES OF COLLECTIONS MUSIC

COLLECTIONS IN EUR MILLION

RANK	COUNTRY/TERRITORY	COLLECTIONS	GROWTH	GLOBAL SHARE
1	UNITED STATES	2,004	+3.5%	23.6%
2	FRANCE	951	+5.4%	11.2%
3	JAPAN	818	-2.8%	9.6%
4	UNITED KINGDOM	813	+33.1%	9.6%
5	GERMANY	766	+4.0%	9.0%
6	ITALY	308	-0.2%	3.6%
7	CANADA	268	+14.0%	3.2%
8	AUSTRALIA	264	+9.1%	3.1%
9	SOUTH KOREA	201	+16.0%	2.4%
10	SPAIN	199	+26.6%	2.3%
11	NETHERLANDS	187	+1.6%	2.2%
12	DENMARK	138	+10.2%	1.6%
13	SWEDEN	133	+21.5%	1.6%
14	SWITZERLAND	119	-0.1%	1.4%
15	BRAZIL	115	-13.0%	1.4%
16	BELGIUM	92	+12.5%	1.1%
17	MEXICO	92	+10.0%	1.1%
18	NORWAY	71	+33.5%	0.8%
19	FINLAND	69	+9.4%	0.8%
20	POLAND	65	-24.6%	0.8%
21	AUSTRIA	63	-7.9%	0.7%
22	CHINA	54	+12.3%	0.6%
23	ARGENTINA	51	-6.4%	0.6%
24	CZECH REPUBLIC	40.7	+19.1%	0.5%
25	PORTUGAL	37.2	+8.5%	0.4%

RANK	COUNTRY/TERRITORY	COLLECTIONS	GROWTH	GLOBAL SHARE
26	SOUTH AFRICA	37.2	+10.1%	0.4%
27	ISRAEL	35.6	+5.5%	0.4%
28	INDIA	35.1	+73.8%	0.4%
29	HUNGARY	34.7	+13.4%	0.4%
30	HONG KONG	33.1	-1.3%	0.4%
31	ROMANIA	24.6	+13.6%	0.3%
32	CHILE	24.1	+23.8%	0.3%
33	TURKEY	21.7	+37.1%	0.3%
34	COLOMBIA	20.2	+6.2%	0.2%
35	IRELAND	18.5	+9.1%	0.2%
36	CROATIA	15.7	+7.4%	0.2%
37	SERBIA	13.2	+7.1%	0.2%
38	MALAYSIA	13.0	+31.3%	0.2%
39	THAILAND	12.6	+68.8%	0.1%
40	TAIWAN, CHINESE TAIPEI	12.2	-14.1%	0.1%
41	PERU	12.1	+1.4%	0.1%
42	SLOVENIA	10.4	+13.8%	0.1%
43	GREECE	9.6	+46.0%	0.1%
44	SLOVAKIA	9.4	+1.9%	0.1%
45	SINGAPORE	8.1	+5.9%	0.1%
46	INDONESIA	7.6	+59.4%	0.1%
47	MOROCCO	7.0	-4.5%	0.1%
48	ALGERIA	6.1	+0.0%	0.1%
49	VIETNAM	5.7	+3.9%	0.1%
50	PHILIPPINES	5.6	+13.4%	0.1%



TABLES OF COLLECTIONS AUDIOVISUAL

COLLECTIONS IN EUR MILLION

RANK	COUNTRY/TERRITORY	COLLECTIONS	GROWTH	GLOBAL SHARE
1	FRANCE	232	-0.7%	38.1%
2	SWITZERLAND	53	+3.3%	8.8%
3	ITALY	51.8	+1.8%	8.5%
4	SPAIN	37.0	-5.4%	6.1%
5	POLAND	30.1	+13.8%	4.9%
6	ARGENTINA	22.9	-19.6%	3.8%
7	NETHERLANDS	22.6	+35.1%	3.7%
8	GERMANY	17.5	-64.0%	2.9%
9	UNITED KINGDOM	16.1	+18.6%	2.6%
10	BELGIUM	14.2	+13.5%	2.3%
11	FINLAND	14.0	-4.6%	2.3%
12	AUSTRIA	13.8	-0.1%	2.3%
13	ISRAEL	8.1	+0.9%	1.3%
14	GREECE	7.1	+52.8%	1.2%
15	CZECH REPUBLIC	6.9	+54.5%	1.1%
16	ROMANIA	5.9	-5.2%	1.0%
17	MEXICO	5.3	+3.5%	0.9%
18	SLOVENIA	5.2	+2.1%	0.9%
19	PORTUGAL	3.2	+16.5%	0.5%
20	HUNGARY	2.9	+19.3%	0.5%



TABLES OF COLLECTIONS VISUAL ARTS

COLLECTIONS IN EUR MILLION

RANK	COUNTRY/TERRITORY	COLLECTIONS	GROWTH	GLOBAL SHARE
1	FRANCE	44	+3.0%	22.4%
2	GERMANY	41	-18.8%	20.7%
3	UNITED KINGDOM	22	+15.2%	11.4%
4	NETHERLANDS	13.7	-23.9%	7.0%
5	SWEDEN	13.3	+10.4%	6.8%
6	ITALY	9.6	+12.2%	4.9%
7	DENMARK	8.0	-2.6%	4.1%
8	UNITED STATES	7.0	+30.2%	3.6%
9	BELGIUM	6.6	+0.5%	3.4%
10	FINLAND	6.0	-5.4%	3.1%
11	SPAIN	5.5	+7.8%	2.8%
12	AUSTRIA	4.7	+6.9%	2.4%
13	SOUTH KOREA	3.0	+14.7%	1.5%
14	AUSTRALIA	2.3	+50.3%	1.2%
15	NORWAY	1.6	+2.2%	0.8%
16	CZECH REPUBLIC	1.3	-12.1%	0.7%
17	SWITZERLAND	0.9	-12.5%	0.4%
18	PORTUGAL	0.8	+12.3%	0.4%
19	CHINA	0.8	-	0.4%
20	JAPAN	0.7	-	0.3%



TABLES OF COLLECTIONS **DRAMA**

COLLECTIONS IN EUR MILLION

RANK	COUNTRY/TERRITORY	COLLECTIONS	GROWTH	GLOBAL SHARE
1	ITALY	36	-14.6%	40.6%
2	FRANCE	23	-17.9%	26.1%
3	SPAIN	7.1	+20.8%	7.9%
4	SWITZERLAND	7.0	-20.3%	7.8%
5	ARGENTINA	3.3	+204.4%	3.7%
6	POLAND	1.7	-45.3%	1.9%
7	BELGIUM	1.6	-54.1%	1.8%
8	PORTUGAL	1.0	+5.5%	1.1%
9	LUXEMBOURG	0.6	-11.6%	0.6%
10	URUGUAY	0.4	-13.5%	0.4%
11	LITHUANIA	0.3	-7.3%	0.4%
12	BELARUS	0.2	+2.5%	0.3%
13	GREECE	0.2	+0.0%	0.2%
14	COTE D'IVOIRE	0.1	+133.7%	0.2%
15	SOUTH AFRICA	0.1	+0.0%	0.1%
16	LATVIA	0.1	-29.8%	0.1%
17	ARMENIA	0.1	+87.5%	0.1%
18	BURKINA FASO	0.1	+0.0%	0.1%
19	SLOVAKIA	0.1	+22.0%	0.1%
20	ESTONIA	0.1	-12.8%	0.1%



TABLES OF COLLECTIONS **LITERATURE**

COLLECTIONS IN EUR MILLION

RANK	COUNTRY/TERRITORY	COLLECTIONS	GROWTH	GLOBAL SHARE
1	AUSTRALIA	77	-5.2%	38.5%
2	UNITED KINGDOM	32	+8.3%	16.0%
3	FINLAND	20.5	+0.6%	10.3%
4	NETHERLANDS	17.2	-26.4%	8.6%
5	SWITZERLAND	16.8	-5.5%	8.5%
6	AUSTRIA	10.0	-10.5%	5.0%
7	ITALY	5.9	-3.0%	2.9%
8	SOUTH KOREA	4.8	+9.1%	2.4%
9	PORTUGAL	3.4	+49.7%	1.7%
10	CZECH REPUBLIC	3.1	+1.3%	1.5%
11	SOUTH AFRICA	2.6	+0.0%	1.3%
12	BELGIUM	1.5	-3.6%	0.7%
13	SLOVAKIA	1.1	+22.7%	0.6%
14	HUNGARY	1.1	+0.0%	0.5%
15	LITHUANIA	0.9	+147.7%	0.5%
16	LATVIA	0.6	-27.0%	0.3%
17	SLOVENIA	0.6	+8.1%	0.3%
18	ISRAEL	0.3	+10.0%	0.2%
19	BURKINA FASO	0.1	+0.0%	0.1%
20	CÔTE D'IVOIRE	0.1	+136.0%	0.0%

TABLES OF COLLECTIONS

COLLECTIONS PER CAPITA BY COUNTRY/TERRITORY (EUR)

WORLD AVERAGE: 1.49

RANK	COUNTRY/TERRITORY	COLLECTIONS PER CAPITA	REGION	RANK	COUNTRY/TERRITORY	COLLECTIONS PER CAPITA	REGION
1	DENMARK	24.89	EUROPE	26	CROATIA	4.47	EUROPE
2	SWITZERLAND	22.62	EUROPE	27	HONG KONG	4.46	ASIA-PACIFIC
3	FINLAND	19.80	EUROPE	28	PORTUGAL	4.42	EUROPE
4	FRANCE	18.52	EUROPE	29	ANDORRA	4.17	EUROPE
5	SWEDEN	14.04	EUROPE	30	HUNGARY	4.03	EUROPE
6	NETHERLANDS	13.72	EUROPE	31	IRELAND	3.71	EUROPE
7	NORWAY	13.42	EUROPE	32	LATVIA	3.06	EUROPE
8	AUSTRALIA	13.35	ASIA-PACIFIC	33	LITHUANIA	2.70	EUROPE
9	UNITED KINGDOM	13.12	EUROPE	34	POLAND	2.56	EUROPE
10	ICELAND	10.38	EUROPE	35	SLOVAKIA	2.44	EUROPE
11	AUSTRIA	10.26	EUROPE	36	MONTENEGRO	2.25	EUROPE
12	BELGIUM	10.02	EUROPE	37	SERBIA	1.99	EUROPE
13	GERMANY	9.91	EUROPE	38	ARGENTINA	1.68	LATIN AMERICA AND THE CARIBBEAN
14	SOUTH KOREA	8.06	ASIA-PACIFIC	39	URUGUAY	1.66	LATIN AMERICA AND THE CARIBBEAN
15	SLOVENIA	7.66	EUROPE	40	ROMANIA	1.60	EUROPE
16	LUXEMBOURG	7.22	EUROPE	41	GREECE	1.58	EUROPE
17	CANADA	7.03	CANADA-USA	42	MACAU	1.54	ASIA-PACIFIC
18	ITALY	6.97	EUROPE	43	SAINT LUCIA	1.49	LATIN AMERICA AND THE CARIBBEAN
19	JAPAN	6.52	ASIA-PACIFIC	44	SINGAPORE	1.48	ASIA-PACIFIC
20	NEW CALEDONIA (FRANCE)	6.50	ASIA-PACIFIC	45	CHILE	1.29	LATIN AMERICA AND THE CARIBBEAN
21	UNITED STATES	6.06	CANADA-USA	46	NORTH MACEDONIA	0.86	EUROPE
22	SPAIN	5.26	EUROPE	47	BOSNIA AND HERZEGOVINA	0.83	EUROPE
23	ESTONIA	4.99	EUROPE	48	BULGARIA	0.79	EUROPE
24	CZECH REPUBLIC	4.86	EUROPE	49	BARBADOS	0.79	LATIN AMERICA AND THE CARIBBEAN
25	ISRAEL	4.70	EUROPE	50	MEXICO	0.75	LATIN AMERICA AND THE CARIBBEAN

TABLES OF COLLECTIONS

COLLECTIONS AS % OF GDP BY COUNTRY/TERRITORY

WORLD AVERAGE: 0.015%

RANK	COUNTRY/TERRITORY	COLLECTIONS AS % OF GDP	REGION
1	FRANCE	0.054%	EUROPE
2	FINLAND	0.047%	EUROPE
3	DENMARK	0.047%	EUROPE
4	UNITED KINGDOM	0.037%	EUROPE
5	MONTENEGRO	0.036%	EUROPE
6	SLOVENIA	0.034%	EUROPE
7	HUNGARY	0.033%	EUROPE
8	CROATIA	0.033%	EUROPE
9	SWEDEN	0.031%	EUROPE
10	NETHERLANDS	0.031%	EUROPE
11	SERBIA	0.030%	EUROPE
12	SWITZERLAND	0.029%	EUROPE
13	AUSTRALIA	0.027%	ASIA-PACIFIC
14	BELGIUM	0.026%	EUROPE
15	GERMANY	0.026%	EUROPE
16	ESTONIA	0.026%	EUROPE
17	CZECH REPUBLIC	0.026%	EUROPE
18	AUSTRIA	0.025%	EUROPE
19	ITALY	0.025%	EUROPE
20	PORTUGAL	0.024%	EUROPE
21	NORTH MACEDONIA	0.024%	EUROPE
22	SPAIN	0.022%	EUROPE
23	NORWAY	0.022%	EUROPE
24	ICELAND	0.022%	EUROPE
25	MALAWI	0.021%	AFRICA

RANK	COUNTRY/TERRITORY	COLLECTIONS AS % OF GDP	REGION
26	LATVIA	0.021%	EUROPE
27	POLAND	0.020%	EUROPE
28	JAPAN	0.020%	ASIA-PACIFIC
29	SAINT LUCIA	0.019%	LATIN AMERICA
30	CANADA	0.019%	CANADA-USA
31	ARGENTINA	0.018%	LATIN AMERICA
32	BRAZIL	0.018%	LATIN AMERICA
33	URUGUAY	0.017%	LATIN AMERICA
34	LITHUANIA	0.017%	EUROPE
35	BOSNIA AND HERZEGOVINA	0.016%	EUROPE
36	SOUTH AFRICA	0.016%	AFRICA
37	SLOVAKIA	0.015%	EUROPE
38	SOUTH KOREA	0.014%	ASIA-PACIFIC
39	GUINEA	0.015%	AFRICA
40	BURKINA FASO	0.014%	AFRICA
41	MEXICO	0.013%	LATIN AMERICA
42	ANDORRA	0.012%	EUROPE
43	UNITED STATES	0.012%	CANADA-USA
44	MOLDOVA	0.012%	EUROPE
45	ISRAEL	0.012%	EUROPE
46	TURKEY	0.011%	EUROPE
47	CHILE	0.011%	LATIN AMERICA
48	COTE D'IVOIRE	0.011%	AFRICA
49	HONG KONG	0.011%	ASIA-PACIFIC
50	COLOMBIA	0.011%	LATIN AMERICA

MEMBERSHIP BY REGION

119 COUNTRIES/TERRITORIES - 228 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
46 countries
106 members

SOCIETY	STATUS	REPERTOIRE	COUNTRY/TERRITORY
AAS	P	M, AV, D, AGP	AZERBAIJAN
ABYROY	P	M	KAZAKHSTAN
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
ARMAUTOR NGO	M	D, M	ARMENIA
ARTISJUS	M	M, L	HUNGARY
ATHINA-SADA	P	AV	GREECE
AUPO CINEMA	P	AV	UKRAINE
AUTODIA	M	M	GREECE
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

SOCIETY	STATUS	REPERTOIRE	COUNTRY/TERRITORY
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
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	M	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
PR5 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

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

Members reclassified to Provisionals

AAS (Azerbaijan), APSAV (Peru), BCDA (Congo), BGDA (Guinea), BSCAP (Belize), BUBEDRA (Benin), BUMDA (Mali), BUTODRA (Togo), CMC (Cameroon), COSOTA (Tanzania), CREAMIMAGEN (Chile), ECCO (Saint Lucia), IVARO (Ireland), KazAK (Kazakhstan), OMDA (Madagascar), OTDAV (Tunisia), SACERAU (Egypt), SACS (Seychelles), SACVEN (Venezuela), SASUR (Suriname), SAVA (Argentina), SOCILADRA (Cameroon), SOGEM (Mexico), UPRS (Uganda), ZAMCOPS (Zambia)

Provisionals upgraded to Members

OAZA (Czech Republic, AV)



CANADA/USA
2 countries
12 members

SOCIETY	STATUS	REPERTOIRE	COUNTRY/TERRITORY
AMRA	M	M	UNITED STATES
ARS	M	AGP	UNITED STATES
ASCAP	M	M	UNITED STATES
ASRL	P	AGP	UNITED STATES
BMI	M	M	UNITED STATES
CARCC	M	AGP	CANADA

SOCIETY	STATUS	REPERTOIRE	COUNTRY/TERRITORY
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

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

119 COUNTRIES/TERRITORIES - 228 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



LATIN AMERICA & THE CARIBBEAN

24 countries

47 members

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



AFRICA

30 countries

33 members

SOCIETY	STATUS	REPERTOIRE	COUNTRY/TERRITORY
BBDAM	M	M, AV, D, L, AGP	BURKINA FASO
BCDA	P	M, AV, D, L	CONGO
BGDGA	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
CMC	P	M	CAMEROON
COSBOTS	P	M, AV, D, L	BOTSWANA

STATUS WITHIN CISAC

M = Member
A = Associate
P = Provisional

New CISAC members as of June 2022:

SOCIETY	STATUS	REPERTOIRE	COUNTRY/TERRITORY	REGION
COPYSWEDE	P	AV	SWEDEN	EUROPE
EDEM	P	M	GREECE	EUROPE
EKKI	P	M, AV, D, L, AGP	SPAIN	EUROPE
MYNDSTEF	P	AGP	ICELAND	EUROPE

SOCIETY	STATUS	REPERTOIRE	COUNTRY/TERRITORY
DGK	P	AV	SOUTH KOREA
FILSCAP	M	M	PHILIPPINES
ICSC	P	AGP	CHINA
IPRS	M	M	INDIA
JASPAR	P	AGP	JAPAN
JASRAC	M	M	JAPAN
KOLAA	P	L, AGP	SOUTH KOREA
KOMCA	M	M	SOUTH KOREA
KOSCAP	P	M	SOUTH KOREA
MACA	M	M	MACAU

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

SOCIETY	STATUS	REPERTOIRE	COUNTRY/TERRITORY
COSOMA	M	M, L	MALAWI
COSOTA	P	M	TANZANIA, UNITED REPUBLIC OF
COSOZA	P	M	TANZANIA, UNITED REPUBLIC OF
GHAMRO	P	M	GHANA
MASA	P	M	MAURITIUS
MCSK	P	M	KENYA
MCSN	P	M	NIGERIA
NASCAM	M	M	NAMIBIA
OMDA	P	M, AV, D, L	MADAGASCAR
ONDA	M	M, AV, D, L	ALGERIA
OTDAV	P	M, D, L	TUNISIA

Societies no longer CISAC members as of June 2022:

COSON (Nigeria, M), ODDA (Djibouti, M), RUR (Russian Federation, AV, M), SOMAS (Mozambique, M), UPRAVIS (Russian Federation, AGP), WGAW (United States, AV, D)

Societies readmitted as Members:

MESAM (Turkey, MU), MSG (Turkey, MU)

SOCIETY	STATUS	REPERTOIRE	COUNTRY/TERRITORY
MACP	M	M	MALAYSIA
MCSC	M	M	CHINA
MCT	M	M	THAILAND
MOSCAP	P	M, AV	MONGOLIA
MRCNSN	P	M	NEPAL
MÜST	M	M	TAIWAN, CHINESE TAIPEI
SACENC	M	M	NEW CALEDONIA (FRANCE)
SACK	M	AGP	SOUTH KOREA
VCPMC	M	M	VIETNAM
WAMI	M	M	INDONESIA

SOCIETY	STATUS	REPERTOIRE	COUNTRY/TERRITORY
SADAIC	M	M	ARGENTINA
SASUR	P	M	SURINAME
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

SOCIETY	STATUS	REPERTOIRE	COUNTRY/TERRITORY
RSAU	P	M	RWANDA
SACERAU	P	M, AV	EGYPT
SACS	P	M	SEYCHELLES
SAMRO	M	M	SOUTH AFRICA
SCM-COOPERATIVA	P	M	CABO VERDE
SOCILADRA	P	D, L	CAMEROON
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

CISAC Client RMEs:

ALLTrack (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), ORFIUM (Greece, M), SESAC (United States, M), Soundreef (United Kingdom, M), UNISON (Spain, M).

ABOUT THE REPORT

DEFINITIONS

The International Confederation of Societies of Authors and Composers (CISAC) is the world's leading network of authors' societies. Every year, royalty income data is compiled from its 228 collective management organisation (CMO) members in 119 countries to generate this comprehensive global collection report. This 2022 report features figures based on the gross domestic collections of CISAC members in their respective countries. To avoid double-counting, only final royalties collected for the use of creative works are compiled. International exchanges among CMOs, which are based on reciprocal agreements, are excluded. Collections are presented globally, on a regional basis with focused data as well as split into the five CISAC repertoires that member societies represent: music, audiovisual, drama, literature and visual arts.

TYPES OF RIGHTS

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

Performing Rights

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

Reproduction Rights

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

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

Other Rights

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

TYPES OF USE

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

TV and Radio

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

Live and Background

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

ABOUT THE REPORT

DEFINITIONS

Digital and Multimedia

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

Compact Discs (CDs)

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

Video

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

Mechanical Reproduction

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

Reprography

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

Private Copying

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

Resale Right

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

Rental and Public Lending

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

Synchronisation Right

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

Exposition Right

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

Educational

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

CISAC GLOBAL COLLECTIONS REPORT: METHODOLOGY

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

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

The euro is the currency chosen for the report for consistency and comparison with previous years. 35% of collections declared to CISAC come from the eurozone while 23% are expressed in US dollar, 9% in pound sterling and 8% in yen. Over 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 2021. Previous year figures are converted into euro using the average rate of the corresponding year. Year-by-year comparisons are impacted by currency changes which may vary considering political and economic situations. Changes play a role when dealing with global or aggregated data. It has no effect on regional or national comparison expressed in the same local currency.

Collection figures have been rounded up to the nearest million or thousands, except when figures are too small to be significant or for rankings. In these cases, one decimal has been added. Percentages are calculated using the actual unrounded figures.

In this 2022 Report, US digital rights income is excluded as it has been transferred to the newly formed Music Licensing Collective which is not a CISAC member. Past year numbers have been re-stated to show like-for-like comparison.

Collections trends have also been impacted by a change in the number of CISAC members. When societies join CISAC and declare their income, this automatically increases revenues in their country. On the contrary, when societies stop being CISAC members, collections from their country appear to decrease compared to previous reports. ■

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Fact-based insights, data, forecasts and strategic intelligence for the global media, entertainment & technology sectors.

TV & Video



- Subscription Streaming
- Video on Demand
- Pay-TV
- Free-to-Air Broadcast

Music



- Streaming Subscriptions
- Advertising Funded Streaming
- CD
- Vinyl

Hardware



- Smartphones
- Tablets
- Smart Speakers
- Connected TV Devices
- Storage Media

Continuous Sector Insights | Bespoke Strategic Studies | Country Level Data | Competitive Landscaping

CISAC

International Confederation of Societies of Authors and Composers
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