

CISAC GLOBAL COLLECTIONS REPORT FOR 2020 DATA **2021**



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

CREDIT THE CREATOR – WITH CISAC SOCIETIES LEADING THE WAY

Behind the mass of statistics in this report there is the beating heart of someone who creates. This person is not one of those big stars everyone has heard of. He, or she, is one of the many thousands whose vocation is to write songs, paint, sculpt, direct films, write books, take pictures – in short, to create culture.

These creators are where our creative industries start. Without their work, the global “creative sector”, worth trillions of dollars, would just not exist.

A creator needs to be talented, entrepreneurial, resilient and hard-working. They need to embrace and drive change. And in today’s streaming market, where 80,000 songs a day are uploaded on Spotify alone, they need to fight as never before to get noticed.

Of course, the majority of would-be professional creators will not get noticed, nor ultimately realise their dream. We in ABBA were the lucky ones. No songwriter, painter, film maker is guaranteed success. But there is something else which every creator, in every repertoire, must be guaranteed: a fair environment in which to work.

And that is where there is an enormous problem, that needs to be fixed right now.

Today, creators work in an inequitable eco-system. If we accept that the song – or the creative work of any repertoire – is the foundation of our creative industries, why do we then accept the near-invisibility of the creator in the commercial value chain?

When I took on the presidency of CISAC in May 2020, the subjugation of the creator was already a massive issue. Then COVID struck, highlighting two things. First, that streaming is fast heading towards being the most important source of creators earnings in the future. And second, that streaming revenues, however fast they grow, are currently simply not providing a fair reward when shared across millions of individual recipients.

If the pandemic leaves one single positive legacy for the creators CISAC represents, it must be to secure the place in our society that they deserve.

***Streaming revenues,
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Here are what I passionately believe is where action is needed now:

- **Better digital remuneration.** COVID has propelled the creative sector into the digital world, and that will not change. CISAC's member societies are witnessing this first hand, and to their great credit many have secured impressive increases in their digital collections. But this is just the start: to give creators the fair deal they deserve, big changes are needed to harmonise data reporting, make the identifier system work effectively and address inefficiencies that are losing creators hundreds of millions of dollars
- **Fair rights for creators.** I do not claim to have the definitive answer to what the "digital split" should be. But it is clear that subscription streaming, the holy grail that rescued us all from piracy some years ago, has now moved into a new phase. Mountainous profits are being made by producers and tech giants. There should be no blame for that, but a deep discussion is needed to make sure that those huge revenues are now fairly shared with creators.

- **Credit the creator.** If we say this enough, then this mantra can become reality: it is time to move the creator from the green room to the main stage, to be at the centre of our discussions about fair rights and remuneration. That is why I work for CISAC – for CISAC is the biggest global network representing creators, and its voice matters.

To achieve these goals, above all, needs collaboration. That is why projects that unite the different players in our industry, such as "Credits Due" which I helped launch in the last few weeks, are so important.

If you have read this far, I have a final plea. Next year, there is a chance I may get asked to write another foreword to this report. Please give me a new script for next year. Save me from being a scratched record. Let's make 2022 the year to credit the creator. But with actions, not words.



Foreword
Marcelo Castello Branco, Chair of the Board

WE MUST ADAPT TO DIGITAL AND RE-INVENT OURSELVES

For the past two years, creators – and the societies that represent them – have faced unprecedented challenges. Our world has been redefined by the pandemic and we had to innovate and be flexible to adapt to the new business environment.

CISAC's Global Collections Report 2021 is an accurate testimony of what we have been going through because it provides the figures that reflect the tough conditions we have faced. But, as I often say, the figures do not always give an accurate picture. What this report also does is to take a granular look at our individual and collective efforts to overcome these challenges and support our members.

The figures show that we have been hit by a seismic drop in revenues due to the crisis. But beyond early apocalyptic forecasts, the decline has been mitigated by our critical commitment to exploring new areas of revenue, in particular in the digital sector. As anticipated, unfortunately, we suffered a drop in revenue from live and public performance, and recovery in these fields will take longer than anticipated. There is still some uncertainty about when we will be able to return to normal, so we have to be cautious about forecasts.

More than ever, creators are entrepreneurs who deserve to be rewarded for their work. In that sense, there have never been so many opportunities for creators to self-manage and benefit from new business models. CISAC societies are, and will be, a fundamental link for creators to build self-sufficient businesses.

Societies worldwide have been supportive of their members and took proactive initiatives, from financial measures to lobbying governments.

The diversity of repertoires represented by CISAC – Music, Audiovisual, Drama, Literature and Visual Art – puts us in a unique position to understand the mutations of the sector and allows us to plan and deliver the tools necessary for creators' autonomy. This also gives us a lot of responsibilities. Our task now is to ensure that collective management organizations worldwide continue to adapt to the hyper-acceleration of digital.

We have to continue to build our network through solidarity, empathy, shared values and generosity. The network needs to be robust, with its massive datasets and the insights that come from them. We can only achieve this goal if we are innovative and forward-thinking. In a world that constantly changes, we have to re-invent ourselves permanently, like a chameleon in the jungle.

We have to continue to build our network through solidarity, empathy, shared values and generosity

We will be judged by the way we respond collectively and individually to better serve our creators in the global digital economy. This is a crucial endeavour, and I have no doubt that our members will rise to the task.



Foreword
Gadi Oron, Director General, CISAC

AMID THE LOSSES, SOCIETIES HAVE HELPED WEATHER THE COVID STORM

For the second year running, our annual Global Collections Report is dominated by the profound impact of the pandemic on creators' royalties.

It will be no surprise to see the statistics in this report reflecting the financial losses of creators since early 2020. After many years of steady growth in royalties for all repertoires across the world, COVID-19 has sent collections sliding downwards.

Live and public performance revenues were down by nearly half in 2020, and are hardly likely to recover in 2021. Both mature and developing markets that are dependent on traditional income streams such as concerts, festivals and exhibitions, suffered significant declines in 2020 collections that continue well into 2021.

The story from our report still has positives, however.

First, overall collections in 2020 fell just under 10% – a result less disastrous than was foreseen one year ago. Digital collections have managed to mitigate the fall in other income sources in many countries. Also, TV and radio, still the largest sources of income, declined less than expected due to a resilient economy.

The rise of digital collections globally is a tribute to the efforts of CISAC societies to change strategy, shift resources and step up digital licensing activity. Without a doubt, the pandemic has been a catalyst for change, accelerating a transition to digital that will not be reversed.

COVID has also illuminated the fundamental value of authors societies and the global collective management system. The 10 case studies researched for this Report demonstrate the lengths CMOs have gone to in supporting their members, with funds and crisis measures at the time they most needed it. And they have fought relentlessly for long term government measures to help ease the recovery.

When one door closes, another one opens. COVID has put societies under a stress test, but societies have adapted and responded and over the past year many of them have made a major leap in their digital licensing. Our community is transforming, but this transformation is helped by strong foundations. The values of collective

management remain as strong as they ever were – championing the rights of creators' works and strength in collective negotiation.

There is optimism but no celebration in 2021. Our sector's recovery is an uncertain and unpredictable one. The impact of the pandemic will continue to be felt, but the operations and performance of our members in 2021 gives reason for confidence in our sector's return to growth.

***Covid has illuminated
the fundamental value of authors
societies and the global
management system***

CISAC GLOBAL COLLECTIONS REPORT

HIGHLIGHTS AT A GLANCE

GLOBAL COLLECTIONS FELL 9.9% - MORE THAN EUR1 BN - TO EUR9.32BN IN 2020

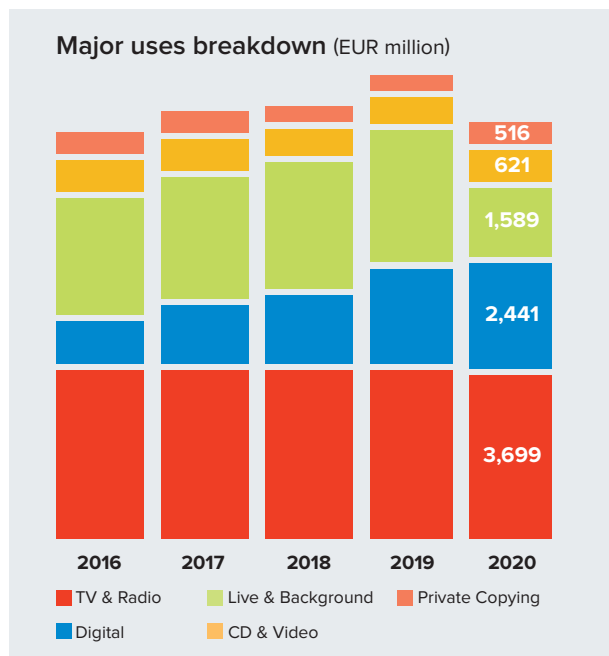
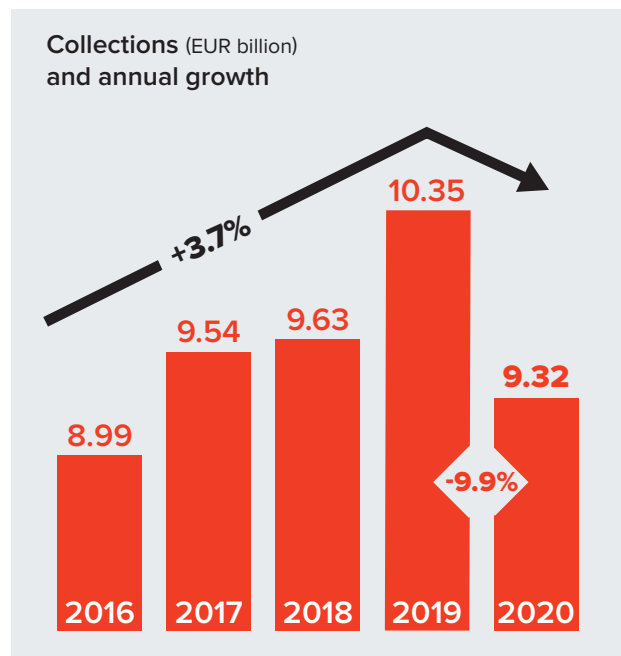
Income from live and public performance suffered most, down by nearly half as lockdown measures took effect across the world. The decline in collections was mitigated by a strong switch to digital in some markets, looser lockdowns in the second half and a more resilient than expected TV broadcast sector.

LIVE AND PUBLIC PERFORMANCE COLLECTIONS FELL 45.4%

Income slumped as lockdown measures closed businesses and shut down public gatherings. Based on data from around one-third of CISAC's member societies, live income fell by an estimated 55% while public performance income declined 35%. Losses reflect the scale of lockdown restrictions, with Canada (-70%), the UK (-62%), Italy (-58%) seeing the largest % falls.

DIGITAL COLLECTIONS INCREASED 16.6%

Lockdown measures have led to a sharply increased streaming consumption, in particular subscription video-on-demand. Strong digital licensing by some societies drove growth, especially in Asia-Pacific and North America. But digital still substantially underperforms, representing slightly more than one quarter (26.2%) of total global collections.

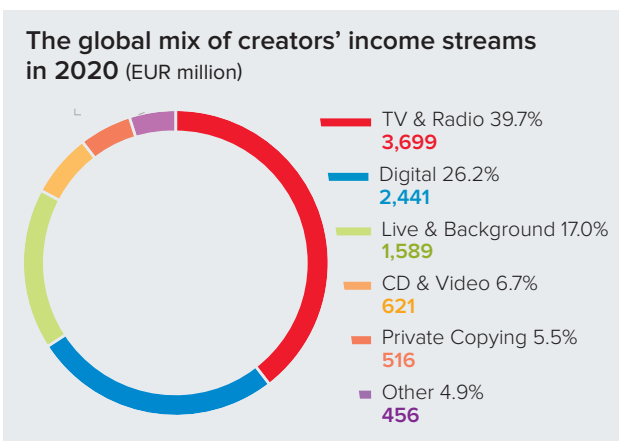


Leading digital markets by share and growth rate

Country/territory	Digital Growth 2020	Digital Market Share
INDONESIA	+52.6%	86.8%
THAILAND	+129.7%	78.2%
MEXICO	+45.2%	74.8%
VIETNAM	+44.0%	73.1%
CANADA	+12.7%	45.6%
SOUTH KOREA	+23.3%	45.3%
UNITED KINGDOM	+14.5%	39.6%
AUSTRALIA	+17.9%	38.3%

TV AND RADIO INCOME DOWN 4.3%, REMAINS THE LARGEST REVENUE SOURCE

Royalties from broadcast, substantially the largest collections source, declined less than many had expected. This was helped by resilience in the economy, limited declines in TV advertising and growth in cable and pay TV consumption.



MOST TOP-10 COUNTRIES SAW DECLINES IN 2020

Market trends in individual countries relate closely to the usage mix, with higher digital shares, such as in the US, cushioning the negative impact of COVID-19. Every other country saw decline apart from the Netherlands, impacted by a reprography back payment. Societies in Europe saw generally larger declines due to larger shares for live and public performance.

Top 10 markets (EUR million), % share and growth

Country	Collections 2020	Global Share	Growth
UNITED STATES	2,215	23.8%	+0.6%
FRANCE	1,207	12.9%	-10.9%
JAPAN	842	9.0%	-4.9%
GERMANY	834	9.0%	-3.9%
UNITED KINGDOM	674	7.2%	-18.0%
ITALY	417	4.5%	-31.2%
AUSTRALIA	325	3.5%	-5.9%
NETHERLANDS	242	2.6%	+3.9%
CANADA	236	2.5%	-8.3%
SPAIN	207	2.2%	-20.6%

MUSIC ROYALTY LOSSES EUR984M, DOWN 10.7%

Music accounts for 87.8% of the total collections by CISAC societies and led the decline in royalties, along with the drama sector. Audiovisual collections were flat, helped by growth in subscription video-on-demand. Visual arts and literature royalties benefitted from long-term contracts and back payments.

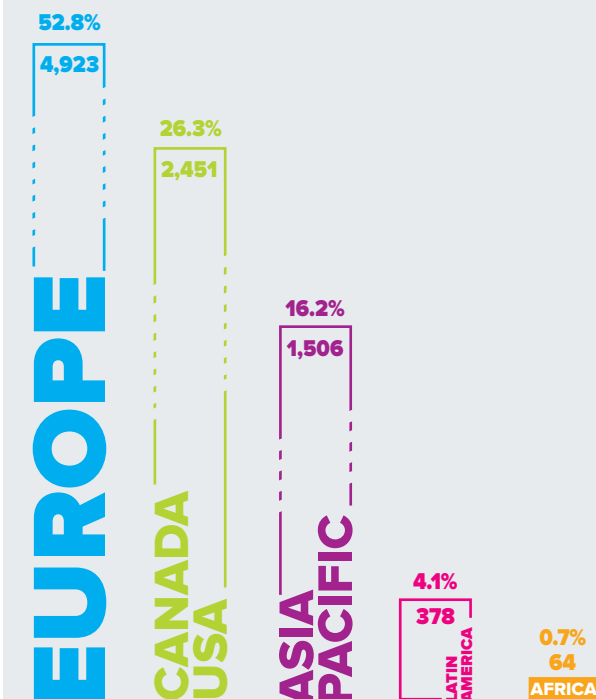
Collections by repertoire, evolution in 2020 (EUR million)

Repertoire	Collections	Annual Growth
Music	8,187	-10.7%
Audiovisual	625	-0.1%
Visual Arts	198	+19.6%
Literary	207	+5.1%
Dramatic	104	-44.4%

EUROPE REMAINS LARGEST REGION FOR ROYALTY COLLECTIONS

However, Europe and Latin America have suffered more from the pandemic due to greater dependence on live and public performance. High digital shares in Asia-Pacific helped collections growth in 2020, with several markets reporting their digital share of collection exceeding 50%.

Share of global collections by region (EUR million)



2021 AND COVID-19: IMPACT ANALYSIS

HOW HAS THE PANDEMIC IMPACTED THE COLLECTIONS OUTLOOK IN 2021/2022?

Eighteen months after it first struck, the COVID-19 crisis is by no means over for the creative sector. It is now clear that the impact of COVID-19 will be felt long into 2022, possibly even until 2023.

The anti-COVID social distancing restrictions put in place in most countries have had long-term impacts on the live sector. They have also encouraged new practices in the digital space which have spread widely and will outlast the pandemic.

This report studies the main income sources of creators, how they have continued being impacted in 2021 and when they are expected to recover from the pandemic.

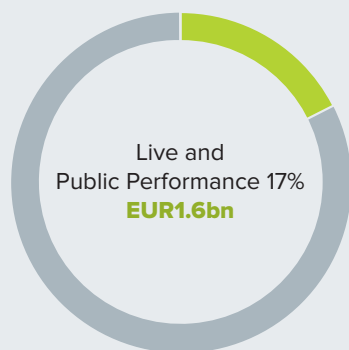
This market study is led by data and input from CISAC member societies. It cannot reflect the true impact of COVID-19 on millions of individual creators. The majority of these are low earners dependent on live and public performance income, who have suffered worse than any generalized market data will indicate.

LIVE AND PUBLIC PERFORMANCE

Live and public performance, representing 17% of all income in 2020, have felt the worst of the pandemic worldwide. These revenue streams saw their value plummet 45.4%, from EUR2.9bn to EUR1.6bn, in 2020.

Live and Public Performance

value and % of global collections
(2020)



After a year choked by lockdown, theatres and music venues have slowly started to reopen from the second quarter of 2021. But the deconfinement has often come under drastic conditions including capacity or density restrictions, track-and-trace protocols, testing regimes and COVID vaccine certification passes.

For as long as the pandemic continues, organisers will have to offer COVID-19-compliant event formats with extensive hygiene and distancing rules. This is problematic, as the model of holding limited-capacity shows is not financially viable for venues, producers and artists alike. Venues therefore depend on timely delivery of government support plans such as tax benefits, legislation and debt relief to survive.

Performers have remained severely affected by travel restrictions during 2020 and 2021. Large-scale performances, which are the main source of live music royalties for songwriters, have completely disappeared until at least the third quarter of 2021.

No quick fix for concerts and festival organisers

The hoped-for recovery in the crucial 2021 concert and festival season has largely not happened. Most big festivals were postponed for the second year running. There has been widespread ongoing uncertainty regarding the possible extension of COVID restrictions, with cancellation insurance largely unavailable for event promoters.

All aspects of cultural performance and exhibition have been affected. Most stage performances have also had to cancel rehearsals, and theatre spaces have been closed. Live-streamed events sometimes replaced them, but royalties are marginal compared to collections on live ticket sales.

Brighter prospects for live in 2022

On the positive side, surveys in 2021 indicate that the public is eager to return to live entertainment and cultural events. A surge of demand is expected in 2022, exceeding pre-pandemic levels.

A June 2021 MarketCast survey in the US reported that about half of all music fans say they are more willing to attend live music events than they were before the pandemic. The PWC Global Entertainment and Media Outlook of September 2020 forecast that the global concert industry's revenue will be USD300m higher in 2022 than in 2019.

In an address to shareholders in May 2021, the global live entertainment company Live Nation Entertainment said signs of a pent-up demand for 2022 are already visible, with shows selling out “faster than ever before”.

This worldwide catch-up of events creates its own challenges, leading to scheduling jams as artists compete to perform on the same dates in a limited supply of venues. Some tours are being planned as far as 2024.

Live streaming: consumption beats income

Live streaming of events existed before the pandemic, but addressing only a niche audience. During lockdown in 2020 and 2021, virtual events quickly replaced cancelled physical ones. Most have been home-made, with little production infrastructure, offered for free.

Many societies have supported such initiatives by providing a platform to members, or boosting distribution of royalties for live streamed acts to encourage artists. Live streaming of events is expected to continue to attract audiences even after the loosening of restrictions to physical events. New players entered the market in 2020 alongside bigger names like Twitch, Tik Tok and YouTube, as well as social media. These have opened new doors for live streaming, with many platforms offering ticketed experiences that are complementary to live events, and not replacing them.

New relationships, new audiences

Music streaming has become a regular addition to live shows. It offers a direct and personalized relationship with audiences worldwide and increases event audiences potentially without limit.

Royalties to creators from live-streamed events do not yet significantly impact on global collections by CMOs. They are in no way capable of compensating for the losses for the live sector. Live streaming tickets are usually offered at a price lower than physical live shows, and only a few major international shows have so far attracted meaningful attendances. The potential, however, is seen as substantial.

Public performance: hesitant recovery

As business premises and hospitality venues have progressively reopened through 2021, CMOs have been able to secure revenue for their members. Public performance income will only fully recover once all business premises and locations have reopened at full capacity. Tariffs are often proportional to the number of visitors or the size of the venue. The reopening with limited capacity therefore restricts full collections.

Many countries suffered a second lockdown in late 2020 and early 2021. This sudden closure of venues, after initial re-opening, brought fresh disruption to societies' invoicing and collection processes. For as long as the uncertainty over sanitary measures remains, collections from public performance will be jeopardized.

In the longer term, a more serious threat is the permanent shutdown of some businesses, and the delay before new business owners can reoccupy the venues. The impact

here is still not clear because most potential bankruptcies have so far been avoided thanks to government support. When that ends, a wave of bankruptcies is expected, with cafés and restaurants hit harder than other sectors.

Tourism decline hits hard

In many countries dependent on tourism, facilities such as hotels and restaurants represent the biggest source of public performance income. Restrictions on travel, with flight cancellations and extra border requirements, all contributed to the decline. According to a study by the European Commission¹, cultural tourism accounts for 40% of tourism in the EU.

In 2021 recovery has come slowly, but many countries were still totally or partially closed into the third quarter. International tourism is still clouded by uncertainty over potential response measures.

Cinema recovers, competes with online

During the pandemic production companies have taken widely to releasing films via OTT platforms only. Blockbuster films that traditionally attract the most viewers have seen their launch delayed to times when cinemas can be fully open again. The resulting drop in collections from cinemas could be sustained if this trend continues. Shootings and productions have managed to keep to schedule, and this resulted in an expected excess of films for release in 2021-2022. In this context, OTT platforms have ended up being a good alternative for distributors when partly or fully dormant cinemas still cannot absorb the high supply of new films. ■

¹ Special Eurobarometer 466 “Cultural Heritage”
- October 2017

BEHIND THE STATS

French singer/songwriter Barcella gives his testimony

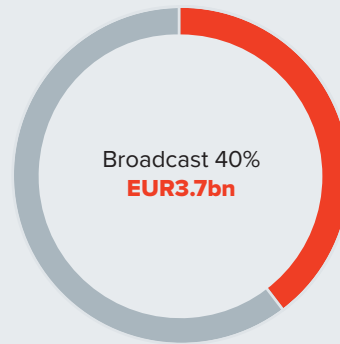


“How can you summarise the impact of this pandemic on people whose career is to create and perform for the public? COVID-19 took away our audience, cancelled our income and filled our lives with hardship and uncertainty. It struck so quickly and so completely that even the most entrepreneurial of us had to depend on support from our authors society and the government. This is not a momentary crisis – it has carried on for nearly two years, and the journey to recovery for most is not quick and easy. Venues face an uncertain future and many are unsure if they can survive. For the experienced artists, mid-career, it is bad; but for the young artist starting out, deprived of an audience, it is far, far worse.” © Charabia

BROADCAST ADAPTS TO A CHANGING LANDSCAPE

Broadcast remains the largest single source of global royalty collections, accounting for 40% of collections in 2020. Collections from TV and radio fell 4.3% from EUR3.9bn to EUR3.7bn in 2020.

Broadcast
value and % of global collections
(2020)



The pandemic has accelerated the transformation of the TV and radio sector, as broadcasters become hybrid services accessible on multiple channels (linear TV, connected TV, web, mobile app, etc).

This has stepped up the shift to digital, with broadcaster offering packages including on-demand over-the-top (OTT) content, online or in-app replay of broadcasters' content, exclusive additional content on social media, etc.

Radio hit more than TV broadcast

Radio stations have been more affected by the pandemic than TV channels. In 2020 CISAC members declared an average 7% decline in collections from radio while TV sunk only 2%. Goldman Sachs "Music in the Air 2020" report estimates that before lockdowns, 40% of music listening took place at work or in the car. But the demand for information and entertainment is robust, and advertising revenue is returning in 2021. Radio consumption has also shifted online with podcasts, filmed shows available on YouTube, and exclusive content.

Advertising more resilient than expected

Private ad-supported TV channels generate most of their revenue by the sale of advertising slots. At the start of the outbreak, there were fears of a lasting decline in advertising caused by a sustained economic crisis. In general, however, advertising has been more resilient than expected. After a 5% decline in the global TV advertising market in 2020, The Business Research Company² predicts a full recovery by 2023.

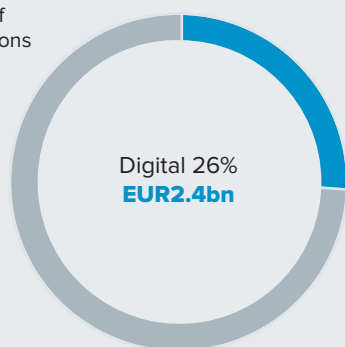
The rescheduling in 2021 of major events such as the European Football Championship, the Eurovision Song Contest, and the Olympic Games saw advertisers come back to TV. This, however, will not prevent the expected long-term year-on-year decrease in societies' collections from broadcasters. COVID-19 will likely exacerbate this existing long-term trend, while societies' digital revenues increase. ■

² The Business Research Company "TV Advertising Global Market Report 2021: COVID-19 Impact and Recovery to 2030" – May 2021

DIGITAL

2020 saw digital collections reach EUR2.4bn, rising to over a quarter of all collections. This share is likely to decrease as collections from live recover in 2022.

Digital
value and % of
global collections
(2020)



From its outbreak in early 2020, the surge in digital consumption of creative works has been one of the pandemic's biggest impacts. This has been led by video-on-demand and audio streaming.

The growth in digital does not benefit all creators equally. Societies in some markets report that digital skews in favour of international rather than local creators while, traditionally, TV and live acts feature substantial national and local content. Digital platforms, and especially the major SVOD platforms, generally feature a disproportionately high share of Anglo-American than local language repertoire. In 2019, the European Audiovisual Observatory counted an average 51% of US content on SVOD platforms in Europe, compared to 22% for national content.

Audio streaming

Music streaming is continuing its long-running upwards trend. At the end of the second quarter of 2021, Spotify reported a 20% growth of its Premium subscriber base year-on-year. But the market is approaching saturation in most developed economies. Until now, music streaming services have only focused on growing their subscriber base. In April 2021 Spotify raised its tariffs for the special plans in Europe, and other platforms are expected to follow.

Video-on-demand

Subscription video-on-demand (SVOD) services have seen exceptional growth during the pandemic. Future-source reports a 34% rise in SVOD subscriptions in 2020, but these are set to tail off to a smaller 18% growth in 2021. Growth is expected to slow down in the coming years. (See analysis, page 38)

Royalty distributions

Trends in royalty collections across all uses affect distributions in the following year.

Most societies do not expect to recover their 2019 collections level before 2022 at best. This means that creators will suffer income declines until at least 2023. To try and reduce uncertainty for creators, many CMOs have shortened the delay between collection and distribution, thus enabling more frequent distributions in a year.

The creative landscape is extraordinarily diverse, and creators are not equally exposed to the effects of the pandemic. The increased online uses of their works benefits a relatively small minority, while the majority of

creators rely on live performance and therefore have lost most of their income.

Illustrating this, French society SACEM reported that, in its July 2021 distribution, more than 50% of its members earning EUR3,000 or more saw revenues 55% below the level of one year earlier. Furthermore, digital distributions tend to decline per rightsholder as monies are distributed among an ever-growing base of rightsholders. ■

CONCLUSION

After a disastrous year for many creators in 2020, COVID-19 has continued to negatively impact incomes in 2021. Increased digital collections have partly cushioned the decline. However, within the overall trend, a disproportionately large majority of creators rely on the local uses of their works, on stage and broadcast on air. These creators have felt little or no compensation from increased digital revenues.

The reopening of cultural spaces will offer a breath of fresh air to the public and creators alike. But two years of struggle have left wounds which will take many years to heal.



VCPMC boosts digital and takes legal actions in Vietnam

Founded less than 20 years ago, VCPMC has established itself as an essential pillar of support for authors in Vietnam and has overseen consistent collections growth. Royalties rose 11% in 2020 and should grow in 2021, despite the pandemic and a flawed legal framework for live collections.



REGION
ASIA PACIFIC
VIETNAM

In 2020, Vietnam shut down public gatherings to combat COVID-19. Businesses, including concert venues, hotels, restaurants, bars and coffee shops, closed for extended periods of time. Numerous licensees went bankrupt, placing pressure on VCPMC's licensing activities. The society was still able to distribute advanced royalties to authors.

With a sharp reduction in public performances, VCPMC reallocated resources and hired third-party service providers to increase digital collections. Digital rose by 44% year-on-year in 2020, compensating for the 54.4% decline in live and public performance. Investments were also completed to improve the processing of huge amounts of usage data from DSPs (e.g., YouTube), identify ownership of works and obtain licenses from new users and platforms (e.g., Amanote, MusicMatch, Deezer, Maxbros, T-Mobile and Twitch).

The society is battling legal challenges in the live sector, with promoters exploiting a flawed legal framework to

license concerts only via the performing rights body PAB, circumventing their legal obligation to be licensed additionally from VCPMC. To protect creators, VCPMC therefore has to engage in costly, time-consuming lawsuits against promoters.

These efforts are important in protecting the interests of music creators, however. Dinh Trung Can, Director General of VCPMC, says: "We need to keep up these actions for our members, as the litigation creates a deterrent, and raises awareness among users of copyright. It also rings the alarm bells to the authorities about the level of copyright infringements we are facing and shows the need to improve the copyright system."

VCPMC is also lobbying hard for its members against a draft copyright law revision which would substantially weaken their negotiating position in licensing their works to users.

“ We need to keep up these actions for our members, as the litigation creates a deterrent, and raises awareness among users of copyright. It also rings the alarm bells to the authorities about the level of copyright infringements we are facing and shows the need to improve the copyright system ”

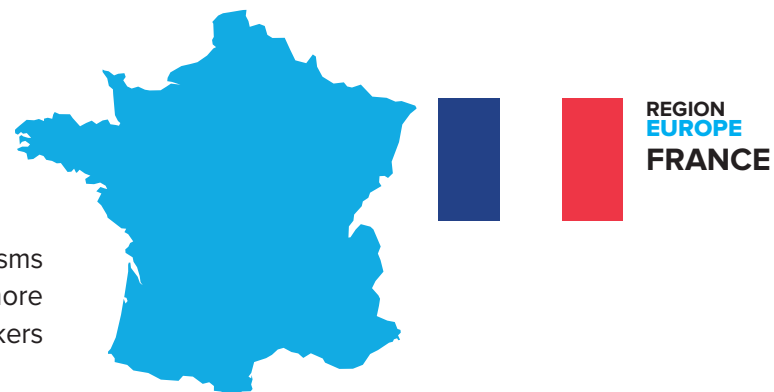
Dinh Trung Can,
Director General of VCPMC

COVID SUPPORT: SOCIETY CASE STUDIES



SACD keeps the spirit of Beaumarchais alive

From the outset of the pandemic, France's SACD made it a priority to set up help mechanisms for members who had suffered drops in revenues. Overall, the society helped directly more than 1,000 authors through its €2.6 million emergency fund. SACD also alerted policy-makers on the plight of authors who did not benefit from a social safety net.



SACD set up several emergency funds covering all its repertoires, funded by different public institutions, and for which SACD has been the operator. Funding was secured through agreements with the National Centre for Cinematography (CNC) and the Ministry of Culture. In addition, the government allowed SACD to direct part of the royalties from private copying assigned to cultural action to fund social programmes. All these actions were extended in 2021.

The society posted revenues of EUR209.8m in 2020, down 8.2% from the previous year. SACD, which also represents drama authors, was mostly affected by a 51% drop in performance rights revenues (EUR33.9m), as a direct consequence of the closure of all theatre and venues during lockdown.

Meanwhile, revenues from audiovisual, cinema and online sector were up 10% to €175.4m year-on-year, reflecting high levels of audiovisual consumption in France. There was also stepped-up activity on the licensing front, with SACD securing in 2020 new licenses with broadcasters and video streaming platforms such as Canal+, TF1, France Televisions, Salto as well as Amazon Prime Video. SACD negotiated these deals to optimise the economic value of its members' repertoire.

SACD Secretary General Patrick Raude says: "During the health crisis, SACD has continued to ensure collections and distributions for its members, while also playing its full role as an authors' society, providing relief and support and being a strong voice to policy-makers."

“During the health crisis, SACD has continued to ensure collections and distributions for its members, while also playing its full role as an authors' society, providing relief and support and being a strong voice to policy-makers”

Patrick Raude,
Secretary General of SACD

COVID SUPPORT: SOCIETY CASE STUDIES



Digital surges as HDS ZAMP backs creators in Croatia

Initial forecasts of COVID-19's impact on collections warned of major losses for 2020. Yet many societies, such as HDS ZAMP, were agile in adopting new ways to operate in order to mitigate these worst-case scenarios. Despite a disastrous drop in income from live and public performance, the Croatian society's actions helped limit the damage to a 15% drop in collections, compared to a record-setting 2019.

To support its creators, HDS ZAMP released a first aid kit and a solidarity fund in early 2020. Throughout the year, it cut costs by reducing the salaries of staff members, let go some employees and made adjustments to everyday business activities. It later established an Anti COVID-19 Fund, which pulled funds from these cost savings, to distribute to members and create another lifeline for creators during the pandemic.

Reductions were balanced with increasing revenues through digital collections. HDS ZAMP grew digital income by a remarkable 193.4% year-on-year. This was achieved through new licensing contracts, new territories and extending digital rights to new services. The growth contributed to plugging partially the gap left by a drop in live music revenues of 57% due to lockdowns.

Similar to other societies, HDS ZAMP showed solidarity with their users in the hospitality sector. Hit hard by lockdown measures, the society applied tariff changes, adjustments, discounts, and payment waivers to support businesses. This solidarity is expected to benefit the society's relations when bars and venues reopen across the country, despite resulting in a 38% decline in "HORECA" collections.

HDS ZAMP CEO Nenad Marčec says the society has helped its member creators weather the crisis. "Despite all the challenges in 2020, HDS ZAMP successfully preserved business stability and mitigated the decline in members' incomes."



REGION
EUROPE
CROATIA

Despite all the challenges in 2020, HDS ZAMP successfully preserved business stability and mitigated the decline in members' incomes

Nenad Marčec,
CEO of HDS ZAMP



ABRAMUS provides online and humanitarian support in Brazil

As Brazil was scrambling to deal with one of the world's worst outbreaks of the pandemic, rights society ABRAMUS moved rapidly to provide financial relief and ways to help members continue working and creating. ABRAMUS, a CMO supporting more than 86,000 music, dramatic and visual authors, saw its collections fall 19.2% in 2020 compared to 2019. This translates into a sharp drop in distributions in 2021.

ABRAMUS and other Brazilian societies co-launched a financial package of R\$14 million, in the form of advances, for the benefit of some 22,000 composers, artists and musicians in vulnerable situations. "We're concentrating all efforts to support our members, reaching for solutions that can help us all go through these difficult times," says CEO, Roberto Mello.

ABRAMUS focused in particular on helping artists reach audiences online. In April 2020, the rights society launched ABRAMUS A Dois, on its dedicated YouTube channel, allowing artists and composers of different music styles and genres to perform songs they considered important for them.

The CMO also joined composer and producer Vine Show to host Resenhando, a programme engaging with composers and artists which is broadcast online on

ABRAMUS' social media channels. To support members and staff, the society created tutorial videos explaining how to register works and work remotely.

ABRAMUS also created a humanitarian and artistic campaign, raising funds to buy basic food baskets and distribute them to people in need. With an initial R\$100,000 from ABRAMUS and additional donations from well-known Brazilian artists, the funds allowed for the purchase and distribution of over 34 tons of food, meeting the basic needs of more than 2,448 families.

In 2021, ABRAMUS launched another initiative, the Solidary Percentage campaign, allowing composers or songwriters to give a percentage of the performing rights from one of their songs to a relief fund supporting workers affected by COVID-19 across the music sector.



**REGION
LATIN AMERICA &
THE CARIBBEAN
BRAZIL**

“We’re concentrating all efforts to support our members, reaching for solutions that can help us all go through these difficult times”

**Roberto Mello,
CEO of ABRAMUS**

DACS Visual arts society DACS leads UK Smart Fund campaign

UK visual arts society DACS is supporting thousands of members facing loss of income due to the pandemic.



**REGION
EUROPE
UNITED KINGDOM**

In June 2021, a coalition of UK collective management organisations, led by DACS, launched a campaign for the Smart Fund to generate significant annual investment for the creative industries and boost economic recovery post-pandemic.

Artists, writers, performers, directors and other creators have come out in support of the Smart Fund in national and international media, creating a talking point on the need for the UK to adopt this scheme.

The Smart Fund would bring the UK in line with global practices of remunerating private copying through a levy. The Smart Fund proposes placing a small, one-off charge on the sale of mobiles, laptops, PCs and other devices that are built to allow people to store and download creative content, solving the problem that creators are not recompensed for the use of their work.

The Smart Fund could raise between £250 and £300 million a year in the UK. This revenue would fairly reward creators and performers, and provide a way for tech companies to invest in the creative industries. A portion of the Smart Fund could be dedicated to social and cultural activities that support creators directly and help put left-behind parts of the UK on an equal footing.

Gilane Tawadros, Chief Executive of DACS, says: “Working with the tech industry and innovators in this sector, we want to support creators and performers, to rebuild and enable the UK’s world-leading cultural heritage, tourism, and creative industries and contribute to its soft power and international standing. The arts provide sustenance to the engine room of cultural regeneration, recovery and renewal for the whole country.”

“The arts provide sustenance to the engine room of cultural regeneration, recovery and renewal for the whole country”

Gilane Tawadros,
Chief Executive, DACS



BMI **BMI grows revenue and distributions to record levels during unprecedented year**

BMI has advocated for the value of music and protected copyright for over 80 years. Throughout the pandemic, BMI team members continued to seamlessly serve its affiliates, licensees, and sister societies around the world.

The society took several effective measures to mitigate the financial impact of the COVID-19 crisis on the creative community, while working closely with its licensees that were impacted by the pandemic. For example, BMI proactively responded to the changes in music usage by its General Licensing customers and ensured continuity of coverage during this period.

BMI closed its fiscal year 2021 achieving record revenue and royalty distributions, despite the pandemic's impact. The company distributed and administered an all-time high of US\$1.335 billion to its songwriters, composers and publishers, up US\$102 million over last year.

Additionally, BMI's total domestic licensing revenue exceeded US\$1 billion for the first time, powered by phenomenal growth in the digital sector across platforms. Internationally, the society also saw significant growth in

the popularity of the BMI repertoire in the digital category. BMI's long-term strategic focus on revenue diversification resulted in this strong performance.

BMI has ensured that its affiliates are compensated in all aspects of digital usage of their creative work, with licenses in place wherever their music is being performed. Over the past several years, it has expanded the digital category from music services to video-on-demand, social media, gaming, fitness, virtual concerts, and beyond, capturing performances on multiple new platforms. BMI has also developed opportunities for its affiliates to promote their works through marketing initiatives with the leading digital services.

Mike O'Neill, BMI President and CEO said: "We applaud BMI's creators and are truly inspired by their innovation, creativity and resilience. Throughout the year, BMI's top



**REGION
CANADA/USA
USA**

priority has been to mitigate the financial impact on our creative community. We are very pleased to not only provide this stability to our songwriters, composers and publishers, but also to grow the value of the BMI repertoire now and into the future."

“ Throughout the year, BMI's top priority has been to mitigate the financial impact on our creative community ”

Mike O'Neill,
BMI President and CEO



GEMA's "protective shield" helps members get through COVID

German music rights society GEMA maintained strong activity during the pandemic, maximising revenues and ensuring support for members. GEMA's total income fell 10.3% to EUR958.8m in 2020, due especially to the pandemic's effect on businesses using music. The regional office segment that collects royalties from music used in businesses, at events and in public licensing, saw income fall by 43%.



REGION
EUROPE
GERMANY

GEMA managed to mitigate the drop in performance income via stable revenues from online music, radio and television. It also secured a one-off payment for private copying and cut administrative costs (down 7% on 2019).

GEMA CEO Dr. Harald Heker says the society faced a "tense" situation in 2020 that would roll over into 2021. However, the crisis has highlighted the outstanding strength, solidarity and collegial cooperation between GEMA and its members.

From the pandemic's start, GEMA set aside about EUR40m for advance payments to members on future pay-outs through the "Protective shield live" programme. It also set up its EUR5m "Corona Relief Fund", allowing members in hardship to apply for transitional support of up to EUR5,000. GEMA approved 2,376 applications and distributed first payments within a month of setting up the two programmes in early March 2020.

GEMA has also ensured that its pay-out dates were maintained without delay. It quickly shifted to remote working from the start of the crisis.

For the federal government's EUR1bn NEUSTART KULTUR project, GEMA coordinated distribution of some EUR30m for music performance venues, clubs and festivals.

For this work, GEMA earned the "German Arts Sponsorship Award" from the Association of Arts and Culture of the German Economy at the Federation of German Industries. The award recognises the multi-step "Corona Emergency Relief Programme for GEMA members", highlighting the strong sense of community achieved via the measures taken.

Heker pledges to maintain GEMA's "protective shield" policy for members in 2021.

“The society faced a “tense” situation in 2020 that would roll over into 2021. However, the crisis has highlighted the outstanding strength, solidarity and collegial cooperation between GEMA and its members”

Dr. Harald Heker,
GEMA CEO

COVID SUPPORT: SOCIETY CASE STUDIES



KOMCA helps cushion collapse of live in Korea

South Korean music society KOMCA has one of the world's highest shares in digital collections (45%), and this, together with a programme of social measures to help members, helped deliver a 9.4% growth in collections despite severe falls in live and public performance revenue continuing into 2021.

COVID-19 brought widespread restrictions, closing venues, restricting public spaces and limiting concert capacities. Live and background collections fell 29.6% (EUR11.17m) in 2020, and the impact has continued through 2021. KOMCA's live collections in the first quarter of 2021 were 96% down on the same period of 2020, due to an 80% reduction in events. After a boom year in 2019 with films such as the Oscar-winning "Parasite", cinema collections fell 53% in 2020 as theatres closed and releases were cancelled.

Large events have notably suffered under lockdown rules. While socially-distanced performances in venues up to 1,500 seats were allowed, performances at a stadium were considered a "gathering" instead of concert hall, restricting entry to no more than 100 people.

In the public performance sector, major royalty streams such as karaoke and entertainment bars have seen continued declines in 2021.

KOMCA has acted to soften the blow of these declines. The society was selected for a charity project for COVID-19 relief jointly organized by Google - TIDES (foundation) - and was subsidised with funding. It also procured creator support funds by concluding MOUs with copyright platforms such as MUSICOW and Wiprex.

KOMCA Chairman Hong-jin Young says: "KOMCA has already successfully surpassed the total collection budget for 2020, due to the growth of the online video service market and platforms such as YouTube and OTT. However, as the deep harm caused by COVID-19 to musicians and the performing arts industry persists, KOMCA is actively working on in-depth measures to address the issue, such as promotion projects for performance rights."

KOMCA's digital collections have increased with the sharp growth in streaming during the crisis. In 2020 digital grew 27.2% to EUR15.46m. The trend has continued in 2021, with a marked shift from traditional broadcast to new OTT and other platforms.



REGION
ASIA PACIFIC
SOUTH KOREA

KOMCA has already successfully surpassed the total collection budget for 2020, due to the growth of the online video service market and platforms such as YouTube and OTT

Hong-jin Young,
KOMCA Chairman



SODAV's resilience plan in Senegal

SODAV – the Senegalese Copyright and Related Rights Office – played a leading role in supporting creators during the pandemic. As in the rest of the world, the cultural sector in Senegal had to face a set of administrative restrictions. “It was very hard for the cultural world,” explains Aly Bathily, Managing Director of SODAV, which suffered a 58% drop in collections in 2020.

In response to the crisis, SODAV has set up a two-step resilience plan. The first consisted of an allocation of 120 million CFA francs, from SODAV's reserves, which included a social fund for 70 million CFA francs, allocated to 2,600 beneficiaries, who received 30,000 CFA francs each and a 30% advance on the lesser of their last three distributions.

In a second phase, SODAV made an advance on distribution of 98 million CFA francs to members, with 70 million CFA francs allocated to music rights and 31 million to digital rights.

SODAV was involved in a third phase supported by the Senegalese state, which made available to SODAV 1 billion CFA francs to distribute to all its members on a basis of equal sharing. Over 8,000 SODAV members have benefited from this fund, amounting to 126,550 CFA francs per person.

SODAV was created in March 2016 to replace the Senegalese Copyright Office (BSDA). It is a multidisciplinary society that manages all copyright and neighbouring rights in Senegal, for all repertoires.

After difficult beginnings linked to the reluctance of music users to enter into licensing agreements with SODAV, the company now derives part of its revenues from the exploitation of its repertoire by broadcasters (around 23% in 2019).

SODAV is currently in the process of deploying teams all over the country to get the creators to join. “Everyone understood the social and economic role played by the collective management organisation and that it was in their best interests to join the society,” said Bathily.



REGION
AFRICA
SENEGAL

Everyone understood the social and economic role played by the collective management organisation and that it was in their interest to join the society

Aly Bathily,
Managing Director
of SODAV



Digital strength helps SACM grow collections in Mexico

Despite the pandemic, Mexico's music society SACM reported collections of 2.32 million pesos in 2020, an increase of 17% over the previous year and of 14% in real terms, discounting the impact of inflation. "In the context of the substantial declines seen by many authors societies around the world, and reported by CISAC, the achievement of our society is very significant," says SACM CEO Roberto Cantoral Zucchi.

The extensive lockdown in Mexico prompted a strong increase in digital revenues. With Mexico's exceptionally high digital share of its total income, digital collections managed to compensate the fall in other areas. In 2020 digital represented two-thirds of SACM's total income.

SACM marked its 75th anniversary in 2020, facing enormous challenges from the pandemic. Priorities in 2020 have been the health and well-being of SACM's members and employees, leading to the creation of SACM's Health Emergency Solidarity Plan. This includes:

- Life and extensive medical insurance for active members and their spouses and heirs.
- Humanitarian, non-refundable financial support for members with lower incomes.
- The granting of loans to active members and extension of time to cover debts.
- No staff cuts, maintaining salaries at 100%.
- Guarantee of full compliance with reciprocity agreements signed with sister companies internationally.

At the end of 2020, Mexico lost one of its greatest musicians, Maestro Armando Manzanero. The Maestro was a former SACM President, a champion for authors rights in Mexico and internationally, and a beacon of inspiration for the SACM community through the pandemic. He said, before his tragic death: "Through its actions SACM is showing its support in difficult times to its members and sister societies. It calls on them to continue creating, even in these circumstances, because music is always hope."

SACM cites the importance of the solidarity of the CISAC community. It has welcomed Maestro Martín Urieta, unanimously elected as the society's President of the Board of Directors, who will ensure a strong future for SACM.



**REGION
LATIN AMERICA &
THE CARIBBEAN
MEXICO**

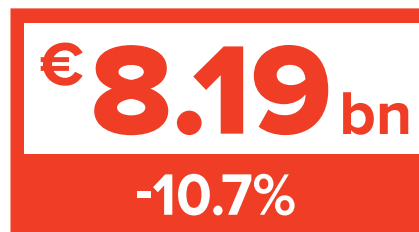
"In the context of the substantial declines seen by many authors societies around the world, and reported by CISAC, the achievement of our society is very significant"

**Roberto Cantoral Zucchi,
SACM CEO**



MUSIC

Live and public performance loses EUR1.2bn in 2020



Revenues from the use of musical works fell by 10.7% in 2020 with 80% of this near EUR1bn contraction experienced in Europe. While every region saw a decline, music collections in Asia-Pacific and North America, bolstered by higher digital shares, were able to better withstand the pandemic. Most of the largest collecting countries saw significant drops in revenue. Italy declined by one-third to wipe EUR167m from the repertoire total with another EUR274m decrease coming from the UK and France.

LIVE AND BACKGROUND SHARE THE PAIN

The largest contributor to these declines was the fall in live and background activity forced by the pandemic. Income from live and public performance nearly halved during the year. This alone equated to more than EUR1.2bn in lost revenue. While not all societies separate their data in this way, it is estimated that around 60% was accounted for by live events as concerts and tours were cancelled. The remaining 40% came from the decrease in background music use by commercial premises that were temporarily closed to ensure social distancing.

LIVE VS DIGITAL

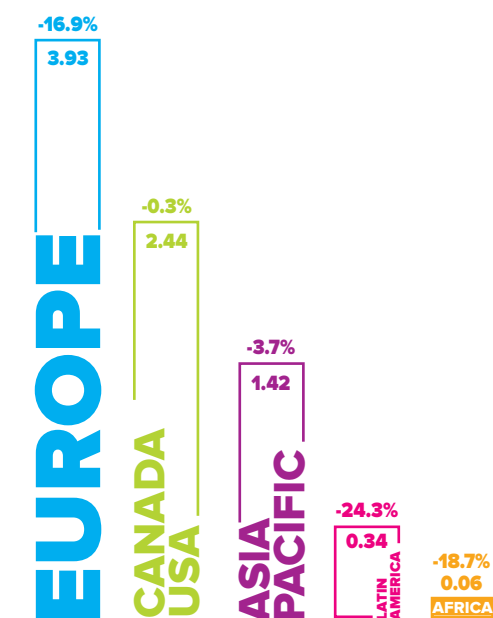
The pandemic appears to have hit local creators harder than international repertoire. Societies report that the decline in live music, in particular, has had a disproportionate negative impact on local member collections, while increased digital income has tended to boost international revenue flows.

Broadcast remains the largest source of music collections, despite falling by 4.4%. The predominantly ad-driven radio and linear TV sectors suffered worse than cable TV, where subscriber numbers rallied sharply in lockdown. The decline of CD and video revenue was extended with a 4.8% drop.

Top 10 collecting countries (EUR million)

Country	Collections	Growth
UNITED STATES	2,209	+0.7%
FRANCE	902	-12.8%
JAPAN	842	-4.8%
GERMANY	736	-9.8%
UNITED KINGDOM	611	-18.8%
ITALY	309	-35.1%
AUSTRALIA	242	-5.2%
CANADA	235	-8.3%
NETHERLANDS	184	-7.8%
SOUTH KOREA	173	+9.4%

Music collections by region (EUR billion)



SOCIETIES SWITCH FOCUS TO DIGITAL

Lockdown measures combined with the closure of physical music stores helped to drive a surge in music streaming subscriptions. Digital distributors reported that mid-week streaming behaviours had begun to mirror those traditionally seen at the weekend and Spotify announced a 24% increase in premium subscriber numbers for the year.

At the same time, live events continued to be cancelled and many societies quickly reallocated their resources into online licensing. The combined effect generated growth of 16.2% in digital music revenue and helped to reduce the impact of the collapse of live and background.

Digital collection champions

Country	Digital music share
MEXICO	75.3%
AUSTRALASIA	51.3%
SOUTH KOREA	47.2%
CANADA	45.7%
UNITED KINGDOM	43.7%

DIGITAL IS THE SECOND INCOME STREAM

As a result of these shifts and for the first time, digital became the second largest source of music creator revenue globally.

Societies in the US collected an additional EUR91m to grow digital earnings by 18.7% while France and Japan added more than EUR100m to the total. In Mexico where digital makes up more than half of all revenue, income grew by more than 45%. Smaller societies with traditionally under-represented digital revenues such as those in Malawi, Thailand and Paraguay were able to close new deals to deliver exponential growth.

Private copying income rose sharply, with a major EUR97m increase in Germany.

Breakdown of music collections (EUR million)

Use	Collections	Growth
TV & Radio	3,252	-4.4%
Digital	2,399	+16.2%
Live & Background	1,489	-45.2%
CD & Video	621	-4.8%
Private Copying	338	+46.2%
Synchronisation	26	-13.0%
Rental/Public Lending	12	-19.4%
Publication	5.7	-12.4%
Other	44	-15.4%

Share of collections by type of use (EUR million)



TV & Radio 39.7%	3,252
Digital 29.3%	2,399
Live & Background 18.2%	1,489
CD & Video 7.6%	621
Private Copying 4.1%	338
Other 1.1%	88



AUDIOVISUAL

Lockdowns and flawed legal landscape limit growth

€625_m
-0.1%

Collections on behalf of audiovisual creators – typically directors and screenwriters - decreased by 0.1% in 2020, to reach EUR625m globally. The repertoire could maintain collections thanks to back-payments for private copying in Germany. Without these, the figures would have swung to a 4.8% decrease. COVID-19 lockdown measures especially impacted live and public performance collections, this category falling 47.5%. Two-thirds of audiovisual collections were generated by broadcast TV, which grew fractionally despite EUR18.0m of cumulated losses in Italy and Argentina. In the latter, exchange effects amplified the impact when converted to Euros.

DIGITAL GROWS WHERE LAWS ALLOW

Aside from the pandemic, lack of adequate rights remains the biggest factor limiting royalty payments to audiovisual creators. Only a small number of territories have legislation granting screenwriters and directors an unwaivable remuneration right and enabling these creators to receive royalties for their work. As a result, audiovisual repertoire still makes up just 6.7% of the total global collections by CISAC member societies. Digital collections, a strong potential growth driver, account for only 5.3% of total audiovisual income.

Boosted by high streaming consumption due to lockdowns, digital collections rose 38.8% in 2020. These performed especially well in Italy and Spain where audiovisual income grew by 36.3% and 53.3% respectively. Both countries have strong legislative regimes favouring fair remuneration for audiovisual creators and supporting long-term economic growth in the sector.

Top 10 collecting countries (EUR million)

Country	Collections	Growth
FRANCE	234	+2.5%
SWITZERLAND	52	-22.7%
ITALY	51	-1.6%
GERMANY	49	+15.2%
SPAIN	39	-6.4%
ARGENTINA	28	-28.8%
POLAND	26	+11.2%
RUSSIAN FEDERATION	26	+18.7%
NETHERLANDS	17	-3.3%
FINLAND	15	-20.4%

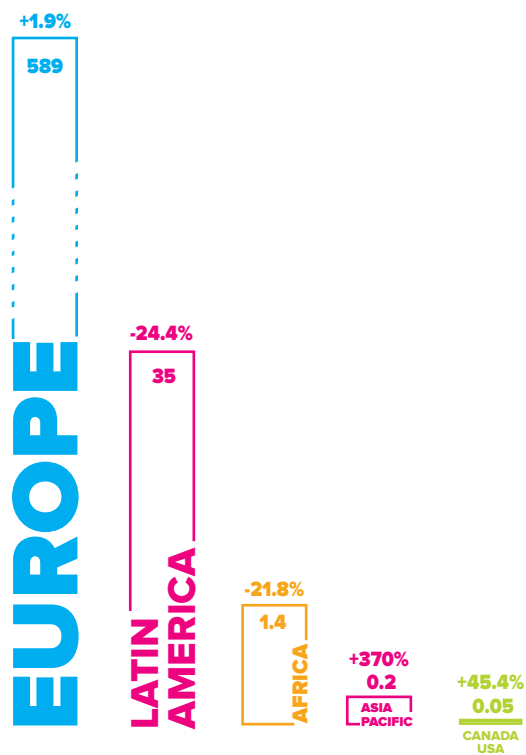
SPAIN: CASE STUDY FOR AUDIOVISUAL CREATORS' RIGHTS

Spain's legal regime, founded on the unwaivable remuneration right, dates back more than two decades to 1996. Since then, the country has almost doubled its box

office revenues and trebled its domestic TV productions. In 2006, the Spanish Intellectual Property Act extended this right to digital and online use. This has helped support growth for creators both over the longer term and through-out the pandemic. A case study on Spain, published in 2021, provides further details - available [here](#).

Introducing this right into the legislation of other countries is key to supporting and stimulating the audiovisual repertoire around the world. In Europe, CISAC has been working with the Society of Audiovisual Authors and Writers & Directors Worldwide to introduce "appropriate and proportionate remuneration" via implementation of the EU copyright directive, thereby setting a standard for the other jurisdictions internationally.

Audiovisual collections by region (EUR million)



LEGAL WINS BOOST COLLECTIONS IN LATIN AMERICA

Recent legislative advances have boosted royalty income in Latin America. Following adoption of the Pepe Sanchez law in 2019, Colombian societies REDES and DASC have signed an agreement with the country's biggest national television networks to ensure the first payments under the country's new fair remuneration law. Collections in 2020 reflected this advance, more than doubling from EUR0.7m to EUR1.5m.

Breakdown of audiovisual collections (EUR million)

Use	Collections	Growth
TV & Radio	410	-3.3%
Private Copying	141	+13.1%
Digital	33	+38.8%
Live & Background	13	-47.5%
Educational Use	5.2	+0.1%
Rental/Public Lending	1.0	-19.1%
Mechanical Reproduction	0.9	-32.9%
Reprography	0.4	+96.3%
Other	21	+0.7%

Share of collections by type of use (EUR million)



TV & Radio	65.5%	410
Private Copying	22.6%	141
Digital	5.3%	33
Live & Background	2.1%	13
Other	4.6%	29



VISUAL ARTS

Back-payments help offset exhibition and gallery closures



Collections from the visual arts repertoire grew by +19.6% in 2020, with the severe impact of the pandemic offset by the successful negotiation of back-payments in Europe. Reprography, a royalty obtained from the sale of photocopiers and printers, grew by 70.7% following payments in Germany and the Netherlands that amounted to EUR17.2m and EUR10.2m respectively.

In France, improved efficiency of private copying royalty distribution helped grow this segment by 144% to EUR11.2m.

ARTISTS RESALE RIGHT SUFFERS AS AUCTIONS ARE SUSPENDED

Excluding these one-off impacts, the visual arts sector declined by 8.4% as lockdown measures drastically reduced activity and led to the suspension of exhibitions, auctions and other income streams.

Collections from the artists resale right, the small royalty enabling artists to benefit from the resale of their works by galleries and auction houses, saw a 18.0% drop. This removed EUR8.4m from the total visual arts collections. Virtually all of this was lost from the markets that had previously provided three-quarters of resale right income with collections in the UK, France and Italy declining by 24.0%, 23.3% and 23.8% respectively. Many auction houses were able to move operations online as the year progressed.

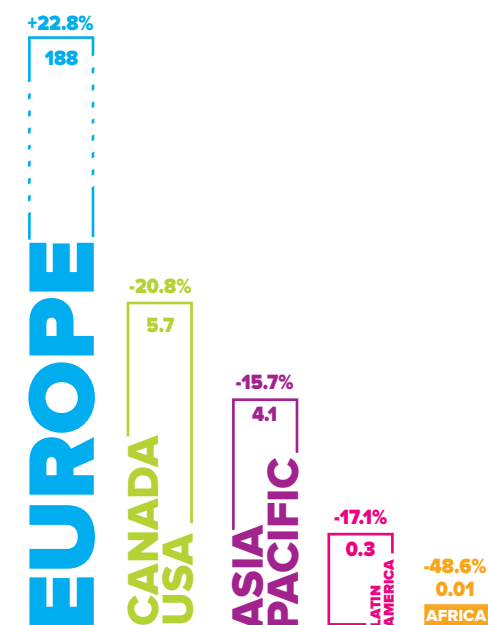
The artists resale right now exists in more than 70 countries.

The reciprocal nature of royalty payments means that its absence in some major art markets, including the USA and China, causes a loss of income for visual artists worldwide. CISAC continues to collaborate with the World Intellectual Property Organisation (WIPO) for a universal treaty implementing the resale right worldwide.

Top 10 collecting countries (EUR million)

Country	Collections	Growth
GERMANY	50	+53.5%
FRANCE	43	+27.6%
UNITED KINGDOM	19	-20.7%
NETHERLANDS	18	+116%
SWEDEN	12	+24.4%
ITALY	8.6	-11.2%
DENMARK	8.3	+3.0%
BELGIUM	6.5	+14.0%
FINLAND	6.3	+24.4%
UNITED STATES	5.4	-21.9%

Visual arts collections by region (EUR million)



NEW SOURCES OF INCOME SHOW FUTURE PROMISE

TV and Radio revenue is collected for the appearance of art works in programmes. This income stream increased by 8.8% due to a doubling of revenue in Belgium. Digital royalties from online uses of visual art, grew by 13.8% due to an extra EUR1m for digital education material in Germany. In France digital declined by 14.4%, but a new landmark agreement for the display of protected images in Google searches was negotiated by French society ADAGP. This is expected to have a positive effect and lead to other similar deals in future.

A more recently introduced right for visual artists allows a royalty to be collected from the exhibition to the public of their work. While its impact was limited by exhibition closures in lockdown, some EUR6.0m was collected in Sweden representing growth of 13.0% in the live and background category.

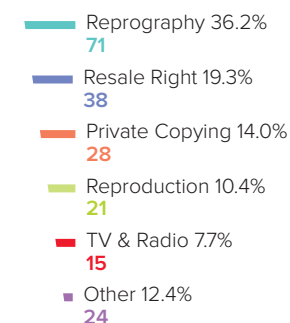
Breakdown of visual arts collections (EUR million)

Use	Collections	Growth
Reprography	71	+70.7%
Resale Right	38	-18.0%
Private Copying	28	+75.5%
Reproduction	21	-15.2%
TV & Radio	15	+8.8%
Digital	6.3	+13.8%
Live & Background	6.6	+13.0%
Educational Use	6.2	+5.9%
Rental/Public Lending	4.4	+0.6%
Other	1.0	-5.5%

Resale right: top 10 collecting countries (EUR million)

Country	Collections	Growth
UNITED KINGDOM	12	-24.0%
FRANCE	8.4	-23.3%
ITALY	5.6	-23.8%
GERMANY	3.3	-14.8%
SWEDEN	1.8	+14.3%
BELGIUM	1.3	+7.6%
DENMARK	1.2	+24.2%
CZECH REPUBLIC	0.9	+11.9%
NETHERLANDS	0.7	-3.3%
AUSTRIA	0.7	-25.6%

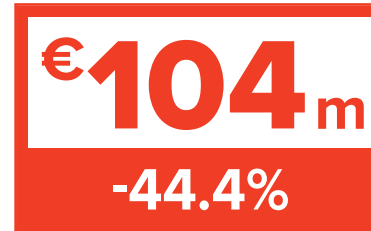
Share of collections by type of use (EUR million)





DRAMA

Collections halve as performances halt



Drama was the hardest hit of all repertoires in 2020, with revenues from the use of these works decreasing by 44.4% to reach a record low of EUR104m. There was decline in many categories of use with live and background, which made up 86.7% of collections the previous year, falling by more than half.

The three largest collecting countries for drama saw some EUR51m removed from their combined total as lockdown measures took hold. In Italy, there was a 64.8% decrease in the number of performances with admissions falling by 70.4%. Opera was particularly badly affected with an 85.4% fall in box office takings.

THEATRES SEE DECLINES WORLDWIDE

In Russia, almost all live public events were banned from March 2020 with live theatre revenues decreasing 63%. In France, authors were similarly affected but fortunately able to benefit from a share of the government compensation paid to theatres for their loss in earnings. Revenues in Latin America fell by more than 80% with Argentina posting an even higher percentage decline.

Digital collections, however, performed well, growing by 66.4%. This was helped by a sharp increase in Poland, up by more than half, and by the start of collections in Latvia and Slovakia. Another positive trend was in the private copying sector, with back payments in Italy and Switzerland leading to increases of 54.8% and 7.0% respectively for this use.

Top 5 countries (EUR million)

Country	Collections
ITALY	42
FRANCE	28
SWITZERLAND	8.8
RUSSIAN FEDERATION	6.6
SPAIN	5.8

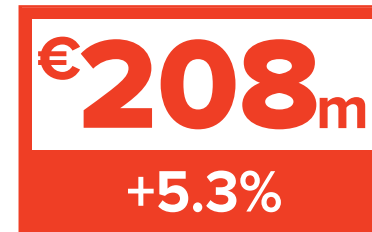
Breakdown of drama collections (EUR million)

Use	Collections	Growth
Live & Background	79	-51.0%
TV & Radio	19	-3.8%
Private Copying	4.0	+17.2%
Rental/Public Lending	0.7	-33.7%
Digital	0.2	+66.4%
Mechanical Reproduction	0.1	-12.1%
Other	0.9	+3.8%



LITERATURE

Reprography and private copying help drive growth



Revenues in the literary repertoire were lifted by back payments, which helped to slightly insulate creators in this sector in 2020. Global revenues increased by 5.3% to reach EUR208m. Despite a decline of 8.3%, Australia remained the largest collecting country for literature with 39.0% of the total. The UK and the Netherlands amounted to 14.2% and 11.3% respectively while adding Finland and Switzerland, the top five made up more than four-fifths of global collections.

Private copying revenue grew 40.5% in Italy, with additional growth in a number of smaller markets including Burkina Faso and Slovenia, which collected this income for the first time. However, substantial percentage declines in Belgium, Hungary and the Netherlands outweighed these increases.

SHARP RISE REPORTED IN THE NETHERLANDS

Reprography collections in the Netherlands grew from EUR15k to EUR15m and now make up 64.4% of the country's total for this repertoire. The increase was facilitated by a regulatory change that permits local society LIRA to collect remunerations for the authors of scientific and educational books and magazines. Globally, income from educational use also increased rising by 12.1%, while TV and radio revenue from the use of literary work in broadcast productions grew 8.3%.

Another growth area for the repertoire was digital, which more than doubled thanks to a sharp increase in the digital loan of literary works in the Netherlands. While revenues from digital and multimedia sources are still very limited, this sector added EUR1.4m to the world total in 2020.

Top 5 countries (EUR million)

Country	Collections
AUSTRALIA	81
UNITED KINGDOM	29
NETHERLANDS	23
FINLAND	20
SWITZERLAND	18

Breakdown of literary collections (EUR million)

Use	Collections	Growth
Reprography	169	+6.0%
Rental/Public Lending	20	+0.4%
Private Copying	4.8	-13.9%
Educational Use	4.2	+12.1%
TV & Radio	3.7	+8.3%
Digital	2.5	+136%
Live & Background	1.2	-34.4%
Mechanical Reproduction	1.2	-9.7%
Other	1.0	+7.5%

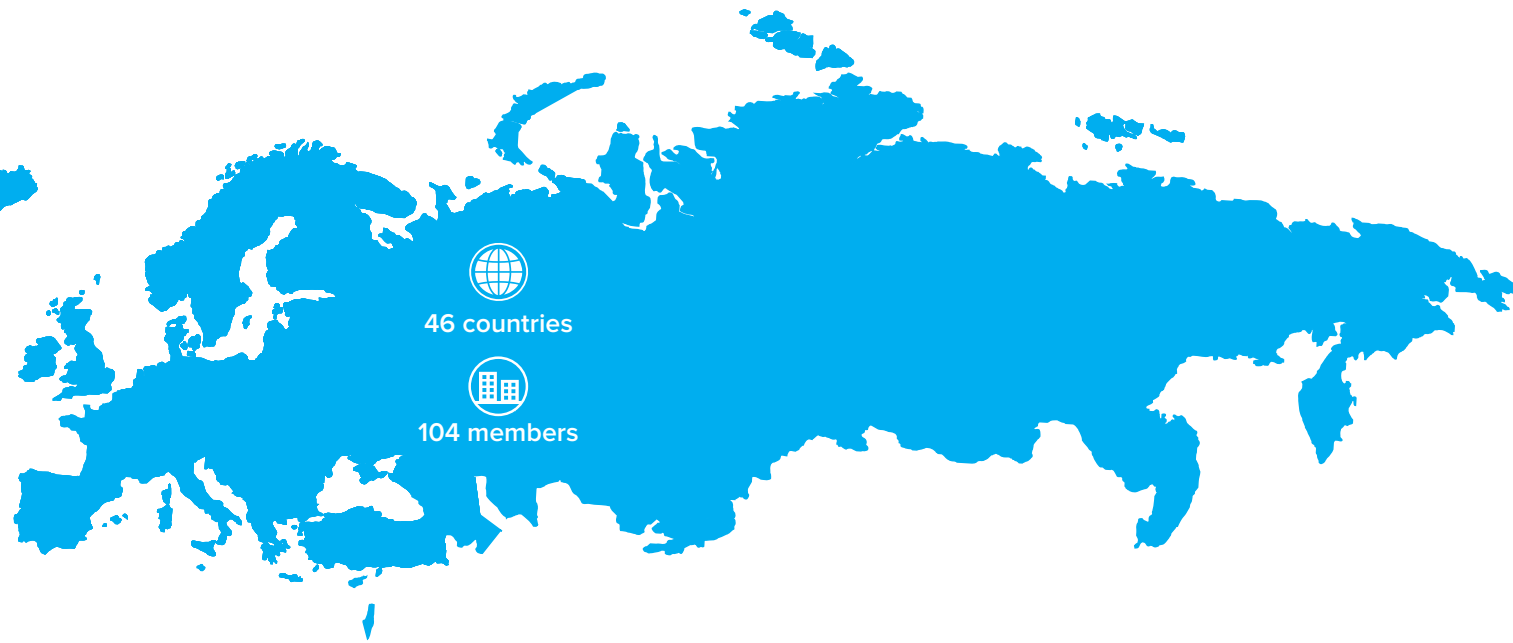
REGION

EUROPE



€4,923m

-14.1%



PANDEMIC MEASURES HALVE EUROPE'S LIVE AND BACKGROUND COLLECTIONS

Collections on behalf of creators in Europe fell by -14.1% in 2020. While this drop was less than some societies originally feared, it still amounted to a decrease of more than EUR800m and returned the region's total to 2015 levels. The decline was driven by a massive reduction in live and public performance, income streams that have grown healthily over the last five years.

The countries hit hardest by the pandemic were Italy, the UK and France, which contracted by -31.2%, -18.0% and -10.9% respectively. This removed EUR484m from the regional total. Germany would have increased this fall but for a large private copying back-payment that added EUR126m to its national collections total. In percentage terms, smaller collecting countries suffered the most with Albania, Armenia and Georgia all seeing revenues shrink by more than 40%.

Breakdown of collections by repertoire, Europe (EUR million)

Repertoire	Collections	Growth
Music	3,926	-16.9%
Audiovisual	589	+1.9%
Visual Arts	188	+22.8%
Literary	119	+17.9%
Dramatic	101	-42.1%

Breakdown of collections by repertoire, Central and Eastern Europe (EUR million)

Repertoire	Collections	Growth
Music	308	-13.8%
Audiovisual	77	-0.0%
Dramatic	11	-56.5%
Literary	6.8	-0.6%
Visual Arts	3.2	+5.1%

LOCKDOWNS HIT LIVE

The decline was mainly driven by two factors. First, the extent of lockdown measures, determining the negative impact on live events and background music use. This

effect was especially noticeable in Italy and the UK. Second, the worst hit regions featured a high ratio of live and background to digital revenue. This prevented the decreases noted above from being offset by digital growth.

Europe remains comfortably the world's largest collecting area. However, the region lost 2.5% of global share. By contrast with Asia-Pacific and North America, Europe's strong traditional revenue streams, with digital around 50% less than live and background income, made the region more vulnerable overall to the impact of COVID-19.

In total, live and background fell by 49.6% to remove more than EUR986m from Europe's revenue. Growth in cable subscription limited TV and radio collections declines to -4.6%, thereby growing this segment's relative share. In the visual arts sector, closures at auction houses led to a -18.4% fall in resale right collections. A back-payment for reprography in the Netherlands turned the country's -7.0% decrease into a 3.9% rise.

DIGITAL REVENUES EXCEED EUR1BN FOR THE FIRST TIME

Europe's digital revenues increased by 14.0% in 2020, helped by a surge in streaming consumption of all repertoires, and an increased focus on digital collections among societies. Smaller markets saw geometric growth. New licensing deals with expanding platforms in markets including Latvia, Slovakia, Croatia and Romania all supported this rise.

In audiovisual collections, increased appetite for subscription video on demand (SVOD) from services such as Netflix and Amazon drove a 38.9% digital rise, nearly compensating for strong declines in public performances. Private copying audiovisual income in Russia grew 18.7%, with higher demand for reproduction devices in the pandemic, and improved efficiencies among CMOs. Back-payments helped visual arts revenue to grow by 22.8%, the repertoire's first increase for three years.

Digital collections rise (EUR million)

Country	Digital collections	Share of country's collections
FRANCE	337	27.9%
UNITED KINGDOM	267	39.6%
GERMANY	177	21.2%
ITALY	48	11.6%
SWEDEN	48	39.2%

Collections by type of use (EUR million)

Use	Collections	Growth
TV & Radio	1,923	-4.6%
Digital	1,071	+14.0%
Live & Background	1,001	-49.6%
Private Copying	504	+37.5%
Reprography	157	+43.5%
CD & Video	123	-22.5%
Resale Right	38	-18.4%
Rental/Public Lending	31	-0.9%
Reproduction	14	-7.5%
Synchronisation	13	-8.3%
Educational Use	9.6	-1.1%
Mechanical Reproduction	2.2	-20.7%
Publication	0.01	+44.5%
Other	36	+1.2%

Share of collections by use (EUR million)



TV & Radio 39.1%	1,923
Digital 21.8%	1,071
Live & Background 20.3%	1,001
Private Copying 10.2%	504
Reprography 3.2%	157
CD & Video 2.5%	123
Other 2.9%	143

REGION

CANADA USA

€ **2,451m**
- 0.3%



DIGITAL STRENGTH OFFSETS COVID IMPACT

A strategic push to increase digital music licensing helped societies in the US achieve exceptional collections growth in 2020, despite the impact of the pandemic.

Total collections in the Canada-USA region reached EUR2.45bn in 2020, down 0.3% over 2019. The region is the world's second largest by revenues, after Europe.

Some 99.8% of all collections come from the music repertoire, with virtually no revenues from the audiovisual repertoire and EUR5.7m from the visual arts sector, down 20.8% year-on-year.

Digital collections were up 17.7% to EUR687m and now represent 28.0% of total collections in the region, against 23.7% a year before. ASCAP, BMI, and SESAC – the three largest societies in the USA – have signed multiple licensing agreements with audio and video streaming platforms in recent years and accelerated this activity to offset COVID in 2020.

In Canada, SOCAN reported a 20.4% increase in revenues from digital sources in 2020, which helped mitigate a sharp decline from performance rights, leading to an overall 4% drop in revenues for the year, including international collections.

BROADCAST AND LIVE/PUBLIC PERFORMANCE

The bulk of income in the region still comes from traditional performance rights for music played on radio and TV, accounting for EUR1.2bn in 2020. This was up 0.3% over 2019, despite a drop in advertising income at the end of the first quarter and in the second quarter of 2020. The broadcast market picked up again in the second half of the year as advertising recovered.

Performance rights from live & background uses bore the brunt of the impact linked to lockdown and the closure of businesses and concert venues. Collections in this sector were down 36.3% year-on-year at EUR243m.

Synchronization and reproduction rights were down, by 32.5% and 21.8%, respectively. However, revenues from mechanical rights from physical media (CD and DVD),

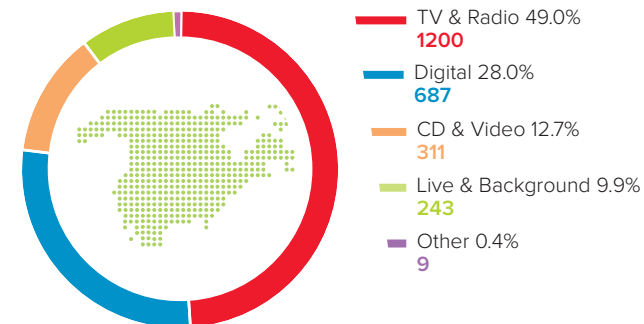
Breakdown of collections by repertoire (EUR million)

Repertoire	Collections	Growth
Music	2,445	-0.3%
Visual Arts	5.7	-20.8%
Audiovisual	0.05	+45.4%

Breakdown of regional collections (EUR million)

Use	Collections	Growth
TV & Radio	1,200	+0.3%
Digital	687	+17.7%
CD & Video	311	+9.4%
Live & Background	243	-36.3%
Reproduction	5.6	-21.8%
Synchronisation	2.8	-32.5%
Reprography	0.1	+43.4%
Other	1.0	+24.6%

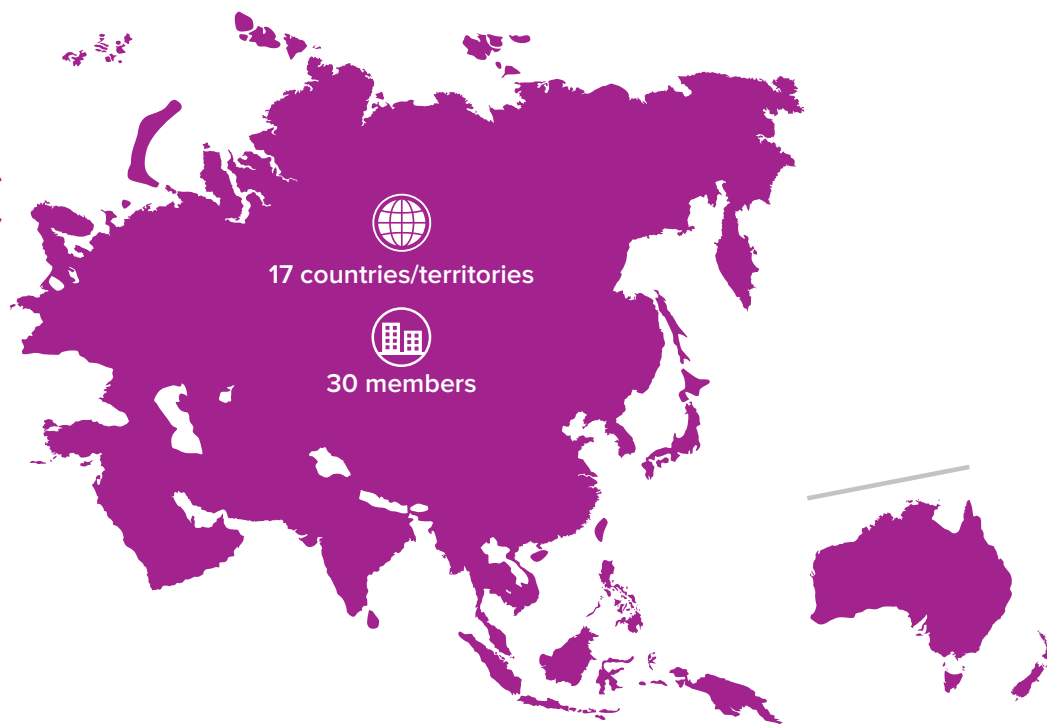
Share of collections by type of use (EUR million)



REGION

ASIA-PACIFIC

€1,506m
- 4.0%



PANDEMIC ENDS YEARS OF GROWTH DESPITE STRONG DIGITAL INCOME

Collections in Asia-Pacific fell by 4.0% in 2020, putting a halt to the consistent strong growth in the past five years. The region has felt a less negative impact from the pandemic than others, largely because of a higher digital revenue share and less dependence on live and public performance income.

Around 90% of the revenues in Asia-Pacific come from three countries. Japan and Australasia saw declines of 4.9% and 5.9% respectively, while in Korea – with a 45.3% digital market share - collections rose by 9.2%. Singapore by contrast fell sharply, with collections more than halving, partly due to delays in royalty payment under a pending copyright tribunal case by a TV broadcaster.

Top 3 territories (EUR million)

Country/territory	Collections	Growth
JAPAN	842	-4.9%
AUSTRALASIA	325	-5.9%
SOUTH KOREA	180	+9.2%

Collections by repertoire (EUR million)

Repertoire	Collections	Growth
Music	1,417	-3.7%
Literary	85	-7.4%
Visual Arts	4.1	-15.7%
Audiovisual	0.2	+370%

DIGITAL UP 18%

Digital collections grew by 18.0% to make up 37.1% of all income, the region's largest segment. In Japan, growth in interactive transmission helped deliver a 21.8% rise in digital. In Korea, digital collections rose 23.3%, with sharp growth of streaming services. Smaller markets saw especially

strong digital growth, with Thailand more than doubling its digital income and Indonesia growing by one-half.

Asia-Pacific's high ratio of digital to live and background collections meant that as restrictions under pandemic shifted demand from live events to online consumption at home, societies in the region were able to quickly refocus and increase these existing digital income streams.

Live and background collections fell 27.2%, now making up 15.9% of the region's total. This is a fall of less than half of the decline seen in Europe. In Malaysia, revenue fell by almost two-thirds after the government issued strict movement control orders and imposed international travel bans which severely hit tourism and hospitality. Only China saw growth in this segment, with collections up 34.6% as the lockdowns eased in the second half of 2020 and society MCSC secured significant back payments from karaoke outlets.

RESILIENCE IN SOME MARKETS

In Australia visual arts collections rose, helped by a relatively less severe lockdown regime and societies moving their operations online. The auction house market ended the year at a similar level to 2019 with visual arts royalties up 9.6%.

In India, collections were boosted by a 55.7% increase in TV and radio royalties due to a substantial payment received towards past settlement and for the year up to March 2020. New deals were also signed in the country with Facebook, Alt Digital and Hungama Music, the first Indian music streaming platform to be licensed by IPRS for Indian works. Mechanical royalty from the use of music in CD and video dropped 9.9% across the region but grew 40.6% in Korea, driven by the remarkable growth of the K-pop music market. Local society KOMCA reported the highest collections in its history from this segment.

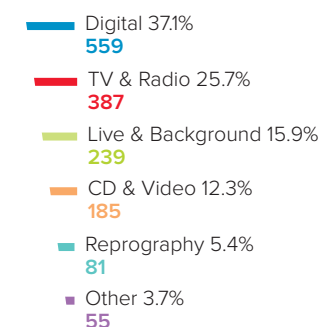
Digital collections rise (EUR million)

Country	Digital collections	Share of country's collections
JAPAN	269	32.0%
AUSTRALASIA	124	38.3%
SOUTH KOREA	82	45.3%
CHINA	27	55.8%
HONG KONG	21	64.1%

Breakdown of collections by repertoire (EUR million)

Repertoire	Collections	Growth
Digital	559	+18.0%
TV & Radio	387	-4.7%
Live & Background	239	-27.2%
CD & Video	185	-9.9%
Reprography	81	-8.3%
Rental/Public Lending	7.6	-28.7%
Educational Use	6.0	+17.9%
Publication	5.6	-12.3%
Synchronisation	4.2	+0.2%
Reproduction	1.2	-45.4%
Resale Right	0.6	+12.8%
Private Copying	0.03	-34.0%
Other	30.2	-20.3%

Share of collections by type of use (EUR million)



REGION

LATIN AMERICA & THE CARIBBEAN



€ **378** m
-25.4%

SHARP DIGITAL INCREASES FAIL TO OFFSET PANDEMIC'S IMPACT

Collections in Latin America and the Caribbean region fell 25.4% to EUR378m in 2020. Live and background and broadcast suffered severely due to confinement measures, falling by 52.8% and 25.2% respectively. Digital made up some of the losses, growing by one-third to nearly double its share in the region. Digital now accounts for 30.6% of the market, helped by new licensing deals concluded or under negotiation with Netflix, Google, Disney, YouTube and others. All repertoires saw reductions, with drama suffering the worst in percentage terms, down 82.5%.

Top 3 territories (EUR million)

Country	Collections	Growth
BRAZIL	132	-28.7%
MEXICO	89	+2.8%
ARGENTINA	84	-29.0%

Collections by repertoire (EUR million)

Repertoire	Collections	Growth
Music	341	-24.3%
Audiovisual	35	-24.4%
Dramatic	1.7	-82.5%
Visual Arts	0.3	-17.1%

LIVE INCOME COLLAPSES ACROSS THE REGION

Brazil, Argentina and Mexico make up 80% of Latin American collections. Examining individual national markets, in local currency to avoid exchange rate distortions, shows contrasting impacts from the pandemic. Mexico suffered a huge two-thirds fall in live and background revenue and a 19.3% decline in TV and radio. But with almost three-quarters of revenue generated by digital and a 65.2% increase in this sector, collections were able to grow by 16.2% with societies expecting an even larger increase in 2021. Pressure from society SACM is also

mounting for the country to adopt private copying reforms in its copyright legislation.

In Argentina, local music society SADAIC reported an 89% collapse in background music, which accounts for a large 45% of total collections. Digital income grew by 40.0% and broadcast collections by 27.4% despite a freeze in cable subscription prices. Overall collections grew 16.3%, but this small gain is undermined by annual inflation in excess of 40%.

The decline in the live sector also hit hard across the rest of the region. Colombia, Peru and Paraguay saw local currency decreases in live and background revenue of -55.8%, -73.8% and -81.8% respectively.

LATIN AMERICA & THE CARIBBEAN

BRAZIL INCREASES DIGITAL COLLECTIONS BY TWO-THIRDS

Digital income in Brazil grew by 68.5% in 2020, accounting for more than a quarter of collections. This share is expected to increase with new SVOD and social media deals already signed or underway. Despite this, national collections declined by 8.5%. Brazil’s live and background sector contracted by one-third. TV and radio, accounting for more than half of all collections, fell by 4.8% and had a significant impact.

NEW RIGHTS HELP AUDIOVISUAL IN COLOMBIA

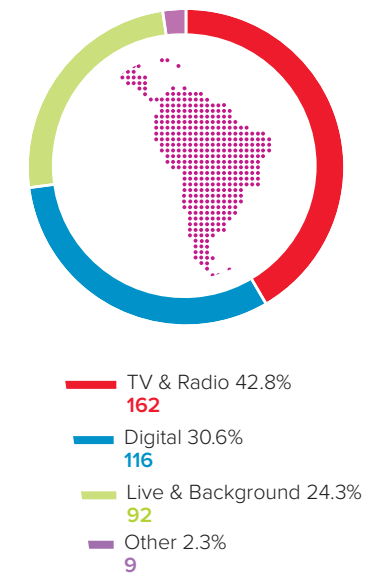
In Colombia collections declined 23.1% despite digital collections rising to more than a one-quarter share of total income. The country’s audiovisual sector also saw strong growth, driven by new TV and radio legislation, that allowed revenue in this repertoire to almost treble. In Chile, national TV and radio income declined by -24.4% and live and background by -65.2%, but digital grew by

55.9% to double its share of revenue. Digital also grew by two-thirds in Peru and more than doubled in Uruguay, but in none of these markets was it sufficient to offset declines in other sectors.

Breakdown of collections by use (EUR million)

Use	Collections	Growth
TV & Radio	162	-25.2%
Digital	116	+36.4%
Live & Background	92	-52.8%
Synchronisation	6.7	-18.2%
Private Copying	1.1	-33.8%
CD & Video	0.5	-48.9%
Reproduction	0.3	-17.2%
Resale Right	0.03	-8.9%
Publication	0.01	-57.0%
Other	0.1	-58.6%

Share of collections by type of use (EUR million)



REGION AFRICA

€ **64 m**
-20.1%



ONLINE GROWS DESPITE 20% FALL IN ROYALTIES

Royalty collections by CISAC member societies in Africa fell by 20.1% in 2020 to reach EUR63.9m with declines reported in every repertoire. The largest losses were in the live and background sector, where collections declined by 28.3%, and TV and radio which suffered a 6.3% drop.

South Africa remains the region's largest collecting country with a 57.0% regional share and Algeria, Morocco and Côte d'Ivoire providing collectively 27.7%. Algeria reported a sharp 62.4% fall in royalties.

Top 3 territories (EUR million)

Country	Collections	Growth
SOUTH AFRICA	36	-4.8%
MOROCCO	7.4	+16.9%
ALGERIA	6.1	-62.4%

Collections by repertoire (EUR million)

Repertoire	Collections	Growth
Music	59	-18.7%
Literary	2.8	-30.5%
Audiovisual	1.3	-21.8%
Dramatic	0.4	-67.7%
Visual Arts	0.01	-48.6%

DIGITAL COLLECTIONS INCREASE

Across the region, digital and multimedia collections decreased by 35.3%, due to a sharp decline in collections for ringtones in Algeria. The rest of the continent, however, grew 15.3%. In South Africa a 39.9% digital increase, combined with a 13.6% rise in broadcast royalties, boosted total collections by 10.5%, reaching a record high of ZAR 683m. Local society CAPASSO has been actively negotiating new digital mechanical licensing and reciprocal agreements with neighbouring societies such as COSBOTS in Botswana.

There were a number of other smaller digital success stories including a ten-fold increase in Malawi and a near one-quarter increases in both Kenya and Guinea.

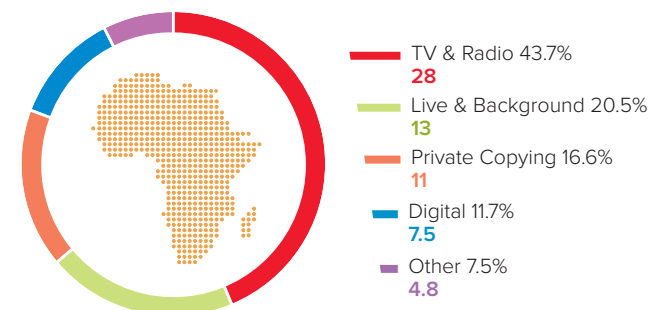
Private copying levies across the region decreased by 16.0%, mainly impacted by the decline in Algeria. Private copying is a valuable and widely untapped collections stream for creators in the region, with just nine countries having both a remuneration and distribution in place. Malawi saw collections increase by 33.1% in 2020 following the change in the legislation in 2019.

LIVE AND BACKGROUND DECLINE THREATENS SMALLER SOCIETIES

Live and public performance fell 28.3% across the region. In many of the smaller collecting countries, the pandemic's impact in this sector has left societies fighting for survival. Revenue fell by 80.0% in Madagascar and by more than 70% in Mauritius, Cameroon and Cape Verde.

Societies have stepped up efforts to support members through the pandemic. COSON in Nigeria paid out millions of Naira in relief to its registered members. Special COVID relief funds were managed by CMOs in Senegal and Burkina Faso. In Botswana, COSBOTS' social and cultural fund dispersed BWP 1m. Mauritius provided individual financial assistance to members in April and May 2020.

Share of collections by type of use (EUR million)





by **David Sidebottom**,
Principal Analyst, Entertainment, Futuresource

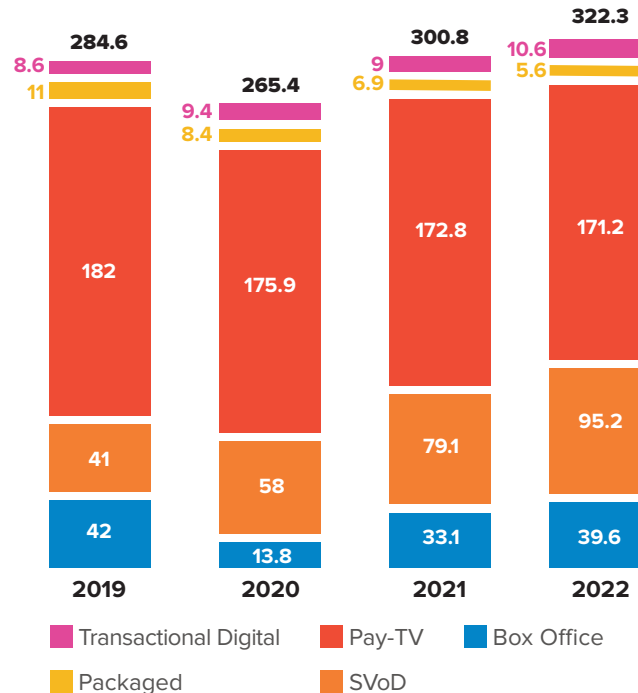
TV BROADCAST AND COVID-19: THE WINNERS AND LOSERS

2020 was perhaps the most turbulent year yet for the television and video sector, but the recovery is gaining strength in 2021 and is set to continue into 2022.

The short-term impact of COVID-19 on industry revenues has varied widely – some sectors such as transactional digital video and subscription video on demand (SVoD) saw a huge boost in 2020, whilst others, such as TV advertising and Box Office, saw substantial declines.

For the sector overall, while the pandemic still provides an undertone of uncertainty in 2021, behaviours and industry practices have normalised and recovery is well under way. Total consumer spend on video entertainment content is set to grow by 13% in 2021 to exceed \$300 billion, following a 7% decline in 2020. This is a better performance than was initially feared. An additional 7% growth in overall consumer spend on video entertainment is expected in 2022, reaching record levels.

Global Video Entertainment Consumer Spend
(US\$ billion)



Source: Futuresource Consulting, TV & Video Insights Service.

Accelerating existing trends

The pandemic has also reinforced existing longer-term structural and technological innovations in the industry, such as shortened movie release windows, new distribution models and increased implementation of targeted, personalised advertising solutions, all of which have become more widespread in 2021. These innovations will be key in driving the diversity of society revenue streams, in particular accelerating the shift away from traditional sources, to digital.

Despite these more positive trends, lockdowns have caused much disruption in 2021. Movie release slates have been delayed with cinemas remaining closed in many countries for the majority of the first half of 2021 – this rhythm of new release movies theatrically is not set to normalise until Q4 2021. In addition, the suspension of content production at the height of the pandemic in 2020 has impacted the availability of both new movies and TV shows during 2021, with the knock-on effect likely to be felt even in 2022.

Streaming is the big winner

The pandemic has both reinforced existing streaming behaviour and helped introduce it to a broader audience. Whilst momentum across many different types of streaming content was strong before the pandemic struck - whether that was in SVoD, AVoD (advertising video on demand), premium movies or user generated content (UGC) - stay at home measures drove streaming consumption and revenues to altogether new levels.

2020 was easily the record year for new net subscriber additions to SVoD services, with a mix of new services such as Disney+ and established industry leading services such as Netflix and Amazon Prime Video, driving growth. Total global SVoD subscriptions reached 1.2 billion at the end of 2020, 300 million higher than the end 2019 figure.

SVOD growth to slow

SVoD market slowdown is inevitable in 2021, as many new SVoD customers in 2020 effectively brought forward their sign-up decision. But whilst there will be over 80 million fewer net subscriber additions in 2021, consumer spend on SVoD is set to grow strongly once more, by 36%, to \$79 billion for the year.

Analysis shows that traditional media use and new streaming models can happily co-exist; firstly, Futuresource's *Living With Digital* survey from end 2020 suggested that in some countries, around half of all video viewing was now

streamed or downloaded, yet in many markets, watching DVDs grew in significance in H2 2020, albeit from a small base. This highlights the continued trend of video viewing fragmentation across different platforms, business models and services.

“Consumer spend on music subscriptions continues its surge ... although a slowdown to 19% is expected in 2022”

Consumer spend on music subscriptions continues its surge, with 24% growth anticipated in 2021, reaching \$27.5 billion. This follows similar growth in 2020, although a slowdown to 19% is expected in 2022.

TV advertising wobble heralds new era

At the start of the pandemic, advertising was heavily impacted. TV advertising in particular was hit hard, but it is set to recover to grow approximately 10% across 2021 and 2022 combined. This recovery reflects a new strategic focus by advertisers and broadcasters on targetable and personalised advertising, known as addressable TV. Investment in addressable TV will help stabilise overall TV advertising revenues going forward, ensuring its long-term significance.

Advertising Video on Demand (AVoD)

AVoD services have also gained further traction during 2020 and 2021. TikTok has firmly established itself alongside YouTube as a leading platform for user generated content (UGC). With an estimated 1 billion users, Futuresource's *Living With Digital* study from July 2021 suggests that up to 30% of adult online consumers are monthly active users of TikTok in Europe and North America. Yet YouTube also continues to perform exceptionally, despite the increased competition. Global YouTube advertising revenues grew by over 30% in 2020 to reach nearly \$20 billion, with this momentum continuing into 2021 and beyond.

The new wave of AVoD, incorporating 'FAST' (Free Ad-Supported Television) streaming services such as PlutoTV, Xumo, Tubi and The Roku Channel has also continued to emerge during this pandemic, particularly in the USA, providing further competition for viewers' time.

Opportunities abound as the dust settles

As the “new normal” evolves, the biggest winners are the consumers. Choice of content and ways to access this content has never been greater. Widening distribution channels for content have provided content creators and rightholders with opportunities to reach their audience and monetise their work in a diverse array of ways. The underlying outlook for the sector is positive, with consumers still expected to spend more on creative content over the coming years. ■

TABLES OF COLLECTIONS

ALL REPERTOIRES



COLLECTIONS FOR ALL REPERTOIRES IN EUR MILLION

RANK	COUNTRY/TERRITORY	COLLECTIONS	GROWTH	GLOBAL SHARE
1	UNITED STATES	2,215	+0.6%	23.8%
2	FRANCE	1,207	-10.9%	12.9%
3	JAPAN	842	-4.9%	9.0%
4	GERMANY	834	-3.9%	9.0%
5	UNITED KINGDOM	674	-18.0%	7.2%
6	ITALY	417	-31.2%	4.5%
7	AUSTRALIA	325	-5.9%	3.5%
8	NETHERLANDS	242	+3.9%	2.6%
9	CANADA	236	-8.3%	2.5%
10	SPAIN	207	-20.6%	2.2%
11	SWITZERLAND	198	-11.2%	2.1%
12	SOUTH KOREA	180	+9.2%	1.9%
13	DENMARK	133	-9.2%	1.4%
14	BRAZIL	132	-28.7%	1.4%
15	SWEDEN	121	-17.7%	1.3%
16	POLAND	116	-0.8%	1.2%
17	BELGIUM	106	-24.5%	1.1%
18	FINLAND	105	-4.5%	1.1%
19	AUSTRIA	98	-19.7%	1.1%
20	MEXICO	89	+2.8%	1.0%
21	ARGENTINA	84	-29.0%	0.9%
22	RUSSIAN FEDERATION	77	-23.5%	0.8%
23	NORWAY	55	-23.3%	0.6%
24	CHINA	48	-0.1%	0.5%
25	CZECH REPUBLIC	43	-13.8%	0.5%

RANK	COUNTRY/TERRITORY	COLLECTIONS	GROWTH	GLOBAL SHARE
26	ISRAEL	42	-15.8%	0.5%
27	PORTUGAL	41	-23.6%	0.4%
28	SOUTH AFRICA	36	-4.8%	0.4%
29	HUNGARY	35	-26.7%	0.4%
30	HONG KONG	34	-12.7%	0.4%
31	ROMANIA	28	-7.0%	0.3%
32	COLOMBIA	21	-33.1%	0.2%
33	INDIA	20	+2.2%	0.2%
34	CHILE	20	-33.6%	0.2%
35	IRELAND	17	-42.6%	0.2%
36	CROATIA	16	-16.6%	0.2%
37	TURKEY	16	-21.5%	0.2%
38	SLOVENIA	15	-12.1%	0.2%
39	TAIWAN, CHINESE TAIPEI	14	-12.2%	0.2%
40	SLOVAKIA	13	-13.6%	0.1%
41	SERBIA	13	-26.8%	0.1%
42	PERU	12	-41.1%	0.1%
43	GREECE	11	-2.3%	0.1%
44	MALAYSIA	9.9	-10.8%	0.1%
45	SINGAPORE	7.6	-54.7%	0.1%
46	THAILAND	7.5	+34.7%	0.1%
47	MOROCCO	7.4	+16.9%	0.1%
48	LATVIA	7.0	+3.0%	0.1%
49	LITHUANIA	6.4	-16.4%	0.1%
50	ALGERIA	6.1	-62.4%	0.1%



TABLES OF COLLECTIONS MUSIC

COLLECTIONS IN EUR MILLION

RANK	COUNTRY/TERRITORY	COLLECTIONS	GROWTH	GLOBAL SHARE
1	UNITED STATES	2,209	+0.7%	27.0%
2	FRANCE	902	-12.8%	11.0%
3	JAPAN	842	-4.8%	10.3%
4	GERMANY	736	-9.8%	9.0%
5	UNITED KINGDOM	611	-18.8%	7.5%
6	ITALY	309	-35.1%	3.8%
7	AUSTRALIA	242	-5.2%	3.0%
8	CANADA	235	-8.3%	2.9%
9	NETHERLANDS	184	-7.8%	2.2%
10	SOUTH KOREA	173	+9.4%	2.1%
11	SPAIN	157	-22.2%	1.9%
12	BRAZIL	132	-28.6%	1.6%
13	DENMARK	125	-9.9%	1.5%
14	SWITZERLAND	119	-7.7%	1.4%
15	SWEDEN	109	-20.6%	1.3%
16	POLAND	86	-1.9%	1.1%
17	MEXICO	84	+4.1%	1.0%
18	BELGIUM	82	-27.8%	1.0%
19	AUSTRIA	69	-24.8%	0.8%
20	FINLAND	63	-5.3%	0.8%
21	ARGENTINA	54	-22.5%	0.7%
22	NORWAY	53	-24.1%	0.6%
23	CHINA	48	-0.1%	0.6%
24	RUSSIAN FEDERATION	44	-27.3%	0.5%
25	PORTUGAL	34	-26.6%	0.4%

RANK	COUNTRY/TERRITORY	COLLECTIONS	GROWTH	GLOBAL SHARE
26	CZECH REPUBLIC	34	-15.0%	0.4%
27	ISRAEL	34	-15.3%	0.4%
28	SOUTH AFRICA	34	-2.8%	0.4%
29	HONG KONG	34	-12.7%	0.4%
30	HUNGARY	31	-28.4%	0.4%
31	ROMANIA	22	-8.9%	0.3%
32	INDIA	20	+2.2%	0.2%
33	CHILE	19	-33.0%	0.2%
34	COLOMBIA	19	-36.8%	0.2%
35	IRELAND	17	-42.6%	0.2%
36	TURKEY	16	-21.5%	0.2%
37	CROATIA	15	-17.5%	0.2%
38	TAIWAN, CHINESE TAIPEI	14	-12.2%	0.2%
39	SERBIA	12	-27.5%	0.2%
40	PERU	12	-41.0%	0.1%
41	MALAYSIA	9.9	-10.8%	0.1%
42	SLOVAKIA	9.2	-5.7%	0.1%
43	SLOVENIA	9.1	-20.9%	0.1%
44	SINGAPORE	7.6	-54.7%	0.1%
45	THAILAND	7.5	+34.7%	0.1%
46	MOROCCO	7.3	+16.8%	0.1%
47	GREECE	6.6	-5.9%	0.1%
48	ALGERIA	6.1	-59.6%	0.1%
49	VIETNAM	5.5	+8.8%	0.1%
50	LITHUANIA	5.2	-15.3%	0.1%



TABLES OF COLLECTIONS AUDIOVISUAL

COLLECTIONS IN EUR MILLION

RANK	COUNTRY/TERRITORY	COLLECTIONS	GROWTH	GLOBAL SHARE
1	FRANCE	234	+2.5%	37.3%
2	SWITZERLAND	52	-22.7%	8.3%
3	ITALY	51	-1.6%	8.1%
4	GERMANY	49	+152%	7.8%
5	SPAIN	39	-6.4%	6.2%
6	ARGENTINA	28	-28.8%	4.6%
7	POLAND	26	+11.2%	4.2%
8	RUSSIAN FEDERATION	26	+18.7%	4.2%
9	NETHERLANDS	17	-3.3%	2.7%
10	FINLAND	15	-20.4%	2.4%
11	AUSTRIA	14	-16.8%	2.2%
12	UNITED KINGDOM	14	-4.5%	2.2%
13	BELGIUM	13	-10.8%	2.0%
14	ISRAEL	8.0	-15.8%	1.3%
15	ROMANIA	6.2	+0.2%	1.0%
16	MEXICO	5.1	-13.4%	0.8%
17	SLOVENIA	5.1	+9.2%	0.8%
18	GREECE	4.6	+6.8%	0.7%
19	CZECH REPUBLIC	4.4	-23.6%	0.7%
20	PORTUGAL	2.7	+26.6%	0.4%



TABLES OF COLLECTIONS DRAMA

COLLECTIONS IN EUR MILLION

RANK	COUNTRY/TERRITORY	COLLECTIONS	GROWTH	GLOBAL SHARE
1	ITALY	42	-31.2%	41.0%
2	FRANCE	28	-51.8%	27.4%
3	SWITZERLAND	8.8	-14.6%	8.5%
4	RUSSIAN FEDERATION	6.6	-62.8%	6.3%
5	SPAIN	5.8	-48.5%	5.6%
6	BELGIUM	3.4	-38.6%	3.3%
7	POLAND	3.1	-38.7%	3.0%
8	ARGENTINA	1.1	-86.4%	1.0%
9	PORTUGAL	1.0	-40.6%	0.9%
10	LUXEMBOURG	0.6	+3.3%	0.6%
11	URUGUAY	0.4	-55.4%	0.4%
12	LITHUANIA	0.3	-39.1%	0.3%
13	BELARUS	0.2	-55.5%	0.2%
14	GREECE	0.2	-42.0%	0.2%
15	LATVIA	0.2	-37.5%	0.2%
16	SOUTH AFRICA	0.1	-45.7%	0.1%
17	BURKINA FASO	0.1	-4.5%	0.1%
18	ESTONIA	0.1	-30.9%	0.1%
19	CHILE	0.1	-73.3%	0.1%
20	SLOVAKIA	0.1	-65.2%	0.1%



TABLES OF COLLECTIONS VISUAL ARTS

COLLECTIONS IN EUR MILLION

RANK	COUNTRY/TERRITORY	COLLECTIONS	GROWTH	GLOBAL SHARE
1	GERMANY	50	+53.5%	25.3%
2	FRANCE	43	+27.6%	21.5%
3	UNITED KINGDOM	19	-20.7%	9.8%
4	NETHERLANDS	18	+116%	9.1%
5	SWEDEN	12	+24.4%	6.1%
6	ITALY	8.6	-11.2%	4.3%
7	DENMARK	8.3	+3.0%	4.2%
8	BELGIUM	6.5	+14.0%	3.3%
9	FINLAND	6.3	+24.4%	3.2%
10	UNITED STATES	5.4	-21.9%	2.7%
11	SPAIN	5.1	-14.2%	2.6%
12	AUSTRIA	4.4	+19.2%	2.2%
13	SOUTH KOREA	2.6	-2.6%	1.3%
14	NORWAY	1.5	+15.0%	0.8%
15	AUSTRALIA	1.5	+9.6%	0.8%
16	CZECH REPUBLIC	1.5	+13.9%	0.8%
17	SWITZERLAND	1.0	-12.8%	0.5%
18	PORTUGAL	0.8	-5.9%	0.4%
19	HUNGARY	0.6	-5.2%	0.3%
20	CANADA	0.4	+2.0%	0.2%



TABLES OF COLLECTIONS LITERATURE

COLLECTIONS IN EUR MILLION

RANK	COUNTRY/TERRITORY	COLLECTIONS	GROWTH	GLOBAL SHARE
1	AUSTRALIA	81	-8.3%	39.0%
2	UNITED KINGDOM	29	-0.1%	14.2%
3	NETHERLANDS	23	+193.0%	11.3%
4	FINLAND	20	+5.8%	9.8%
5	SWITZERLAND	18	+10.1%	8.6%
6	AUSTRIA	11.2	+7.0%	5.4%
7	ITALY	6.1	-6.2%	2.9%
8	SOUTH KOREA	4.4	+12.7%	2.1%
9	CZECH REPUBLIC	3.0	+12.3%	1.5%
10	SOUTH AFRICA	2.6	-22.7%	1.2%
11	PORTUGAL	2.2	-2.1%	1.1%
12	BELGIUM	1.5	+0.8%	0.7%
13	HUNGARY	1.1	-31.8%	0.5%
14	SLOVAKIA	0.9	-6.5%	0.5%
15	LATVIA	0.8	+33.6%	0.4%
16	SLOVENIA	0.6	+3.1%	0.3%
17	LITHUANIA	0.5	-5.9%	0.3%
18	ISRAEL	0.4	-45.7%	0.2%
19	BURKINA FASO	0.1	+271.1%	0.1%
20	MOROCCO	0.0	+65%	0.0%

TABLES OF COLLECTIONS

COLLECTIONS PER CAPITA BY COUNTRY/TERRITORY (EUR)

WORLD AVERAGE: 1.48

RANK	COUNTRY/TERRITORY	COLLECTIONS PER CAPITA	REGION	RANK	COUNTRY/TERRITORY	COLLECTIONS PER CAPITA	REGION
1	SWITZERLAND	22.93	EUROPE	26	CZECH REPUBLIC	4.04	EUROPE
2	DENMARK	22.85	EUROPE	27	CROATIA	3.97	EUROPE
3	FRANCE	20.10	EUROPE	28	PORTUGAL	3.97	EUROPE
4	FINLAND	18.93	EUROPE	29	LATVIA	3.69	EUROPE
5	NETHERLANDS	13.89	EUROPE	30	HUNGARY	3.55	EUROPE
6	AUSTRALIA	12.65	ASIA-PACIFIC	31	SOUTH KOREA	3.48	ASIA-PACIFIC
7	SWEDEN	11.73	EUROPE	32	IRELAND	3.40	EUROPE
8	AUSTRIA	11.02	EUROPE	33	POLAND	3.04	EUROPE
9	NORWAY	10.17	EUROPE	34	SLOVAKIA	2.32	EUROPE
10	GERMANY	10.02	EUROPE	35	LITHUANIA	2.31	EUROPE
11	UNITED KINGDOM	10.02	EUROPE	36	MONTENEGRO	1.86	EUROPE
12	ICELAND	9.38	EUROPE	37	ARGENTINA	1.84	LATIN AMERICA AND THE CARIBBEAN
13	BELGIUM	9.18	EUROPE	38	SERBIA	1.82	EUROPE
14	LUXEMBOURG	7.63	EUROPE	39	MACAU	1.71	ASIA-PACIFIC
15	NEW CALEDONIA (FRANCE)	7.39	ASIA-PACIFIC	40	URUGUAY	1.64	LATIN AMERICA AND THE CARIBBEAN
16	SLOVENIA	7.02	EUROPE	41	BARBADOS	1.47	LATIN AMERICA AND THE CARIBBEAN
17	ITALY	7.00	EUROPE	42	ROMANIA	1.45	EUROPE
18	UNITED STATES	6.72	CANADA/USA	43	SINGAPORE	1.34	ASIA-PACIFIC
19	JAPAN	6.69	ASIA-PACIFIC	44	SAINT LUCIA	1.18	LATIN AMERICA AND THE CARIBBEAN
20	CANADA	6.21	CANADA/USA	45	GREECE	1.07	EUROPE
21	ISRAEL	4.57	EUROPE	46	CHILE	1.03	LATIN AMERICA AND THE CARIBBEAN
22	ESTONIA	4.54	EUROPE	47	TRINIDAD AND TOBAGO	0.96	LATIN AMERICA AND THE CARIBBEAN
23	HONG KONG	4.48	ASIA-PACIFIC	48	NORTH MACEDONIA	0.91	EUROPE
24	SPAIN	4.38	EUROPE	49	BOSNIA AND HERZEGOVINA	0.75	EUROPE
25	ANDORRA	4.18	EUROPE	50	BULGARIA	0.71	EUROPE

TABLES OF COLLECTIONS

COLLECTIONS AS % OF GDP BY COUNTRY/TERRITORY

WORLD AVERAGE: **0.013%**

RANK	COUNTRY/TERRITORY	COLLECTIONS AS % OF GDP	REGION
1	FRANCE	0.053%	EUROPE
2	FINLAND	0.044%	EUROPE
3	DENMARK	0.043%	EUROPE
4	CROATIA	0.033%	EUROPE
5	SLOVENIA	0.032%	EUROPE
6	NETHERLANDS	0.030%	EUROPE
7	SWITZERLAND	0.030%	EUROPE
8	UNITED KINGDOM	0.028%	EUROPE
9	AUSTRALIA	0.028%	ASIA-PACIFIC
10	MONTENEGRO	0.028%	EUROPE
11	SERBIA	0.027%	EUROPE
12	AUSTRIA	0.026%	EUROPE
13	SWEDEN	0.026%	EUROPE
14	HUNGARY	0.025%	EUROPE
15	ITALY	0.025%	EUROPE
16	GERMANY	0.025%	EUROPE
17	ARGENTINA	0.025%	LATIN AMERICA AND THE CARIBBEAN
18	LATVIA	0.024%	EUROPE
19	BELGIUM	0.023%	EUROPE
20	ESTONIA	0.022%	EUROPE
21	POLAND	0.022%	EUROPE
22	CZECH REPUBLIC	0.020%	EUROPE
23	PORTUGAL	0.020%	EUROPE
24	JAPAN	0.019%	ASIA-PACIFIC
25	SPAIN	0.018%	EUROPE

RANK	COUNTRY/TERRITORY	COLLECTIONS AS % OF GDP	REGION
26	ICELAND	0.018%	EUROPE
27	NORTH MACEDONIA	0.018%	EUROPE
28	NORWAY	0.017%	EUROPE
29	CANADA	0.016%	CANADA/USA
30	MALAWI	0.015%	AFRICA
31	SAINT LUCIA	0.015%	LATIN AMERICA AND THE CARIBBEAN
32	BOSNIA AND HERZEGOVINA	0.014%	EUROPE
33	SLOVAKIA	0.014%	EUROPE
34	SOUTH AFRICA	0.014%	AFRICA
35	BURKINA FASO	0.014%	AFRICA
36	LITHUANIA	0.013%	EUROPE
37	ROMANIA	0.013%	EUROPE
38	SOUTH KOREA	0.013%	ASIA-PACIFIC
39	URUGUAY	0.012%	LATIN AMERICA AND THE CARIBBEAN
40	UNITED STATES	0.012%	CANADA/USA
41	ISRAEL	0.012%	EUROPE
42	ANDORRA	0.012%	EUROPE
43	BARBADOS	0.011%	LATIN AMERICA AND THE CARIBBEAN
44	HONG KONG	0.011%	ASIA-PACIFIC
45	BRAZIL	0.010%	LATIN AMERICA AND THE CARIBBEAN
46	MEXICO	0.009%	LATIN AMERICA AND THE CARIBBEAN
47	CHILE	0.009%	LATIN AMERICA AND THE CARIBBEAN
48	COLOMBIA	0.009%	LATIN AMERICA AND THE CARIBBEAN
49	PARAGUAY	0.009%	LATIN AMERICA AND THE CARIBBEAN
50	BULGARIA	0.008%	EUROPE

MEMBERSHIP BY REGION

123 COUNTRIES/TERRITORIES - 232 MEMBERS



EUROPE

46 countries
104 members

SOCIETY	STATUS	REPERTOIRE	COUNTRY/TERRITORY
AAS	M	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
ARMAUTHOR 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
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
EVA	A	AGP	BELGIUM
FILMAUTOR	M	AV	BULGARIA
FILMJUS	M	AV	HUNGARY
GCA	M	M, D, L	GEORGIA
GEMA	M	M	GERMANY

SOCIETY	STATUS	REPERTOIRE	COUNTRY/TERRITORY
GESAC	A	M, AV, D, L, AGP	BELGIUM
GESTOR	M	AGP	CZECH REPUBLIC
HDS-ZAMP	M	M	CROATIA
HUNGART	M	AGP	HUNGARY
IMPF	A	M	BELGIUM
IMRO	M	M	IRELAND
IVARO	M	AGP	IRELAND
KAZAK	M	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
MCPS	M	M, AV	UNITED KINGDOM
MESAM	M	M	TURKEY
MSG	M	M	TURKEY
MUSICAUTOR	M	M	BULGARIA
NCB	M	M	DENMARK
NCIP	M	M, D	BELARUS
NGO-UACRR	P	M, D	UKRAINE
OAZA	P	AV	CZECH REPUBLIC
OFA	P	AGP	SERBIA
OOA-S	P	AV, AGP	CZECH REPUBLIC
OSA	M	M	CZECH REPUBLIC
PAM CG	M	M	MONTENEGRO
PICTORIGHT	M	AGP	NETHERLANDS
PROLITTERIS	M	L, AGP	SWITZERLAND
PRS	M	M	UNITED KINGDOM
RAO	M	M, D, AGP	RUSSIAN FEDERATION
RUR	P	AV, M	RUSSIAN FEDERATION
SAA	A	AV	BELGIUM
SABAM	M	M, AV, D, L, AGP	BELGIUM
SACD	M	AV, D	FRANCE

SOCIETY	STATUS	REPERTOIRE	COUNTRY/TERRITORY
SACEM	M	M	FRANCE
SACEMLUXEMBOURG	M	M	LUXEMBOURG
SAIF	M	AGP	FRANCE
SANASTO	M	L	FINLAND
SAZAS	M	M	SLOVENIA
SCAM	M	AV, L	FRANCE
SDADV	P	AV, M	ANDORRA
SIAE	M	M, AV, D, L, AGP	ITALY
SOFAM	M	AGP	BELGIUM
SOKOJ	M	M	SERBIA
SOPE	M	D	GREECE
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
UPRAVIS	P	AGP	RUSSIAN FEDERATION
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, L	POLAND
ZAMP MACEDONIA	M	M	NORTH MACEDONIA
ZAMP SLOVENIA	M	L	SLOVENIA
ZAPA	M	AV	POLAND

Society readmitted as of March 2021:

SGAE was readmitted as Member.



CANADA/USA

2 countries
14 members

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

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

STATUS WITHIN CISAC

M = Member
A = Associate
P = Provisional

REPERTOIRE

M = Music

AV = Audiovisual

AGP = Visual Arts

L = Literature

D = Drama

NR = No Repertoire

MEMBERSHIP BY REGION

123 COUNTRIES/TERRITORIES - 232 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	M	AGP	PERU
ARGENTORES	M	AV, D	ARGENTINA
ARTEGESTION	P	AGP	ECUADOR
ASSIM	M	M	BRAZIL
ATN	M	AV, D	CHILE



AFRICA

32 countries
37 members

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

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
MACA	M	M	MACAU
MACP	M	M	MALAYSIA

SOCIETY	STATUS	REPERTOIRE	COUNTRY/TERRITORY
AUTVIS	M	AGP	BRAZIL
BSCAP	M	M	BELIZE
COSCAP	M	M	BARBADOS
COTT	M	M	TRINIDAD AND TOBAGO
CREAIMAGEN	M	AGP	CHILE
DAC	M	AV	ARGENTINA
DASC	M	AV	COLOMBIA
DBCA	P	AV	BRAZIL
DIRECTORES	M	AV	MEXICO
ECCO	M	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	M	M, D	VENEZUELA

SOCIETY	STATUS	REPERTOIRE	COUNTRY/TERRITORY
COSOTA	M	M	TANZANIA, UNITED REPUBLIC OF
COSOZA	P	M	TANZANIA, UNITED REPUBLIC OF
DALRO	M	D, L, AGP	SOUTH AFRICA
GHAMRO	P	M	GHANA
MASA	P	M	MAURITIUS
MCSK	P	M	KENYA
MCSN	P	M	NIGERIA
NASCAM	M	M	NAMIBIA
ODDA	P	M	DJIBOUTI
OMDA	M	M, AV, D, L	MADAGASCAR
ONDA	M	M, AV, D, L	ALGERIA
OTDAV	M	M, D, L	TUNISIA
RSAU	P	M	RWANDA

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

SOCIETY	STATUS	REPERTOIRE	COUNTRY/TERRITORY
SADAIC	M	M	ARGENTINA
SASUR	M	M	SURINAME
SAVA	M	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	M	AV, D, L	MEXICO
SOMAAP	M	AGP	MEXICO
SPAC	M	M	PANAMA
UBC	M	M	BRAZIL

SOCIETY	STATUS	REPERTOIRE	COUNTRY/TERRITORY
SACERAU	M	M, AV	EGYPT
SACS	M	M	SEYCHELLES
SAMRO	M	M	SOUTH AFRICA
SCM-COOPERATIVA	P	M	CABO VERDE
SOCILADRA	M	D, L	CAMEROON
SODAV	P	M, AV, D, L, AGP	SENEGAL
SOMAS	P	M	MOZAMBIQUE
UNAC-SA	P	M	ANGOLA
UPRS	M	M	UGANDA
ZAMCOPS	M	M	ZAMBIA
ZIMURA	M	M	ZIMBABWE

New CISAC members as of June 2021:

SOCIETY	STATUS	REPERTOIRE	COUNTRY/TERRITORY	REGION
ASCR	P	AGP	USA	CANADA-USA
ISOGRATIS	P	AV	GREECE	EUROPE
KOSCAP	P	M	SOUTH KOREA	ASIA-PACIFIC

Societies having changed status between May 2020 and June 2021:

CAPASSO and OOA-S are now members.
CMRRA, DALRO, MCPS and SESAC are now CISAC Client RMEs.

Societies no longer CISAC members as of June 2021:

MESAM (Turkey, MU), MSG (Turkey, MU), SINGCAPS (Singapore, MU), SOPE (Greece, D).

REPERTOIRE

M = Music

AV = Audiovisual

AGP = Visual Arts

L = Literature

D = Drama

NR = No Repertoire

STATUS WITHIN CISAC: M = Member A = Associate P = Provisional

ABOUT THE REPORT

DEFINITIONS

The International Confederation of Societies of Authors and Composers (CISAC) is the world's leading network of authors' societies. Every year, royalty income data is compiled from its members in 123 countries to generate this comprehensive global collection report.

This 2021 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. 36% of collections declared to CISAC come from the Eurozone while 24% are expressed in US dollar and 9% in yen. Over two-thirds of the global remuneration of creators for the use of their works are expressed in these three currencies.

For the current year, collections are expressed or converted in Euro at an average rate for 2020. Previous year figures are converted into Euro using the average rate of the corresponding year. Year-by-year comparisons are impacted by currency variations, which may vary considering political and economical 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. In these cases, one decimal has been added. Percentages are calculated using the actual unrounded figures.

In the 2021 Global Collections Report, 2016 to 2020 collections data may differ partially from previous reports due to certain declared collections being recategorized to more precisely describe the society's collection activities.

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. By contrast, when societies stop being CISAC members, collections from their country appear to decrease compared to previous reports.

Collections by Spanish society SGAE (re-admitted to CISAC in March 2021) are included within total 2020 collections.

CREDITS

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