# CISAC GLOBAL COLLECTIONS REPORT –
HIGHLIGHTS AT A GLANCE

**Global collections by CISAC member societies grew 0.9% to EUR9.65bn** in 2018, spurred by strong digital growth across all repertoires and in all regions. The surge of digital income and resilience in the two other largest collections streams (TV and radio and live and background) continues to offset decline in income from physical media.

Collections (EUR billion) and annual growth
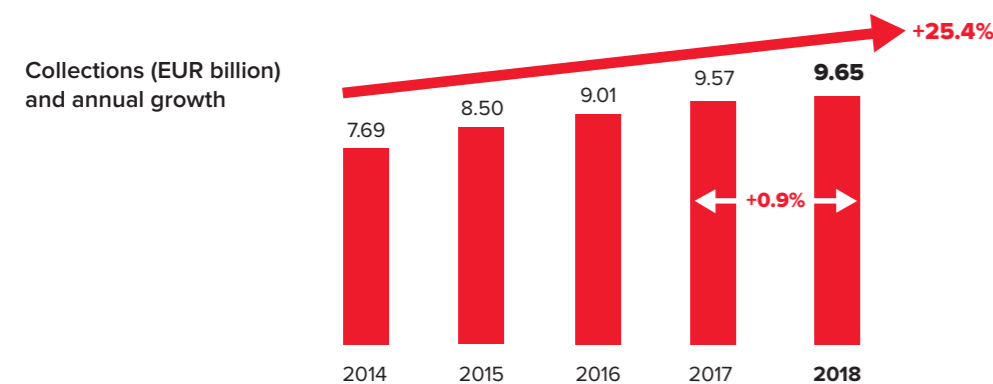
Digital is growing its share of income. In 2018, 17.0% of global collections came from digital sources, up from 7.5% in 2014, driven by rapid expansion of subscription streaming and video services. This leads to growing fragmentation of collections sources.

The changing mix of creators' income streams, 2018 vs 2014
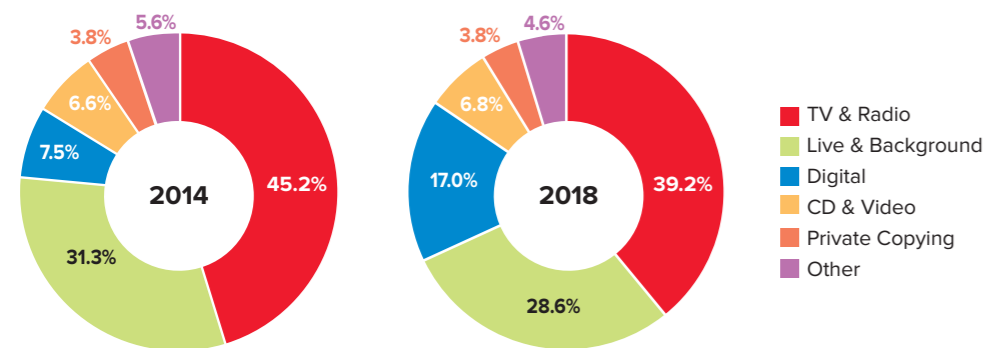
Digital up 29%, traditional income streams stay strong. Digital collections have grown by more than EUR1 billion over the last five years, from EUR580 million to EUR1.64 billion. TV and radio declined 2.4% and live and background rose 0.5% in 2018. Combined income from these traditional uses remains strong, and is EUR653 million higher in 2018 than in 2014.

Major uses see collections growth (EUR million)
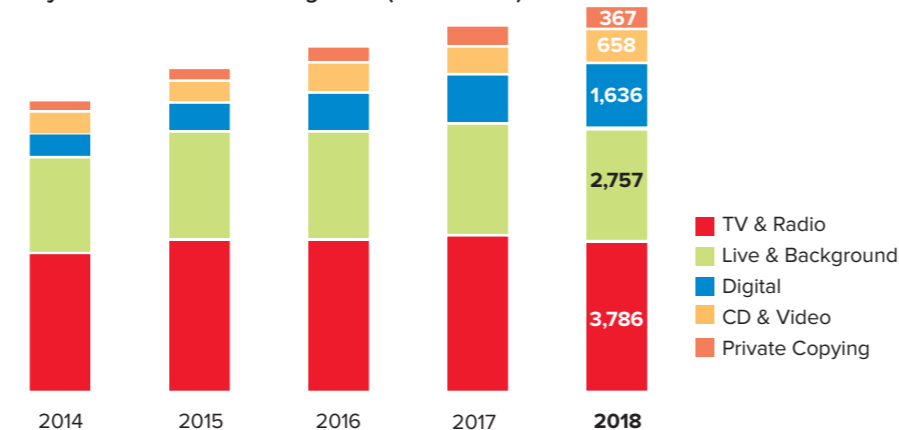
Big collectors are driving growth. A small number of major markets are helping drive the global growth of collections. Key factors were: a doubling of digital income in France; strong digital growth in the US alongside resilient traditional collections streams of TV, radio and live and background; and digital licensing deals in Japan, a relative "latecomer" to the digital market.

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

Country	Collections 2018	Global share	Growth	Country	Collections 2018	Global share	Growth
UNITED STATES	1,938	20.1%	+2.6%	ITALY	583	6.0%	-1.3%
FRANCE	1,314	13.6%	+9.2%	AUSTRALASIA	325	3.4%	+0.9%
JAPAN	821	8.5%	+2.6%	SPAIN	285	3.0%	+27.1%
GERMANY	806	8.4%	-12.9%	CANADA	238	2.5%	-0.5%
UNITED KINGDOM	740	7.7%	-0.4%	NETHERLANDS	236	2.4%	+0.4%

Asia-Pacific is leading in digital. The migration to digital is happening at markedly different rates per country and region, with Asia claiming the largest digital share. Japan, China, Korea and Australasia are seeing rapid growth, taking Asia-Pacific's digital share (26.3%) to twice that of Europe. Europe, with well-established broadcast, live and other income streams, has the lowest digital share, at 13.3%.

Digital shares per region
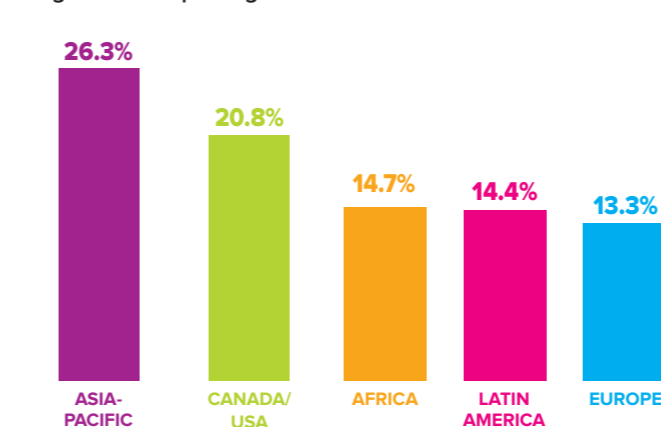
Digital champions lead the way. Of the 20 top markets for collections, five countries lead the way in terms of their digital share, collecting more than a quarter of income from digital sources. Many other markets outside the world top 20, such as China, Indonesia and Mexico, have significantly higher digital shares.

Major markets with the highest digital shares

Country	Digital share	5-Year Growth
SWEDEN	39.8%	+83.1%
SOUTH KOREA	33.4%	+102%
CANADA	30.8%	+139%
DENMARK	27.0%	+192%
UNITED KINGDOM	26.1%	+146%

Music repertoire drives growth. Music accounts for 88.0% of total collections and grew 1.8% in 2018. All other repertoires except drama have seen strong 5-year growth. Back payments made in 2017 led to downward adjustments in 2018.

Collections by repertoire, annual growth and five-year growth (EUR million)

Type of Use	Collections	Annual Growth	5-Year Growth
Music	8,490	+1.8%	+26.8%
Audiovisual	605	-2.4%	+22.0%
Literary	199	-3.1%	+17.7%
Dramatic	186	-5.1%	-3.3%
Visual Arts	168	-18.4%	+19.9%

Europe leads the regions. Europe remains the largest region for collections, followed by Canada/USA and Asia-Pacific. All regions saw growth in 2018 except Latin America, impacted by declines in Brazil and Argentina.

Share of global collections by region (EUR million)
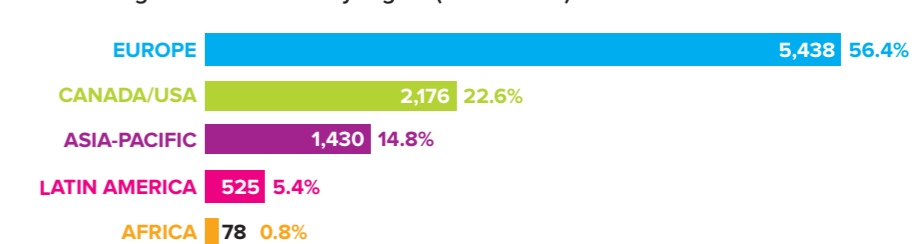
Strong euro in 2018 impacts growth. CISAC publishes collections in euros at current currency levels (i.e. taking into account the impact of annual currency fluctuations). This has reduced the growth significantly in 2018. In constant currency terms, (i.e. stripping out the impact of the strengthening euro), global collections growth would have been 4.4% in 2018.