



**COVID-19:**  
**CRISIS, RESILIENCE,**  
**RECOVERY**  
**CISAC GLOBAL COLLECTIONS**  
**REPORT 2020**



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Data

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## ABOUT CISAC

The International Confederation of Authors and Composers (CISAC) brings together 232 authors societies in 120 countries and five regions. These collective management organisations represent four million creators active in five major repertoires: audiovisual, dramatic, literature, music and visual arts.



# FOREWORD BY **BJÖRN ULVAEUS,** PRESIDENT OF CISAC

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## **Governments can help on COVID by making a fair environment for creators**

I am pleased to introduce the annual CISAC Global Collections Report, for the first time as President of CISAC. The Report reflects a sector in the middle of a desperate crisis. But it also highlights creators' tremendous resilience and provides insights on the way forward.

When the COVID-19 pandemic emerged in early 2020, huge swathes of the creative industries shut down. Today, uncertainty about the future is even worse than it was then. Millions of creators are losing their livelihood. We were the first industry to be impacted and we will be the last to return to health.

As the crisis continues, its specific impacts become clearer. Whole communities of small live music, film and visual arts venues might disappear forever. Concerts and cinema will be damaged for many years. Most theatres around the world are extremely ill-equipped to cope with social distancing and they are also dependent on an older, and thus more vulnerable audience. Songwriters, painters and screenwriters will lose the live performance venues, the exhibition and the film sets that are the testbeds for their careers. And the greatest harm will be to the younger, less established creators and those in less developed markets.

Amid this terrible gloom, there are positives. First, creators are innovative and resilient. They are entrepreneurs. Today these qualities are helping keep our sector afloat, for example with the blossoming opportunities in the licensed live streaming business.

The crisis is also proving that creators are desperately needed by society. It is their music, art, TV programmes and other content that has sustained people across the world during lockdowns. And this will continue in the long term. CISAC's member societies have a vital role to play here. Their mission, to fight for and protect the millions of creators they represent, has never been more important than today.

At the end of the day, however, resilience, entrepreneurship and solidarity are not enough. To build a long path out of this crisis, we have to turn to governments. This is not just for emergency funds, however welcome those have been. Policymakers also need to tackle the problems in front of them: the deep flaws that have skewed the playing field for creators for many years. We all know that democracy works at a slow pace, and that's perhaps as it should be, but I hope that COVID-19 is disruptive enough to show policymakers how vulnerable culture workers are and to speed things up before it's too late.

**The time for action,  
swift action, is now.  
Without a song or  
a dance what are we?**



## FOREWORD BY **BJÖRN ULVAEUS,** PRESIDENT OF CISAC

In today's digital world as in the old analogue one, the core, the very substance of the creative industry is the creator's work. And yet, instead of being firmly planted at the centre, this is often treated as a necessary evil in the periphery. At least regarding fair pay. This has become far more pronounced in the pandemic, as shareholders of huge companies make eye-watering profits from creators' online content.

COVID-19 did not create this skewed level playing field. But it has sure aggravated and exacerbated it. This is the time for governments to show they take creative industries seriously. It is time for policymakers to wake up and act.

First, this means staying faithful to long-planned projects to strengthen copyright and authors rights. The European Copyright Directive, adopted in 2019 and which does more than any other legislation to bring fairness for creators in the digital world, must be implemented without delay. It is highly dismaying to see the risk that this game-changing directive might be diluted far from its original objective.

Further work is also needed in the US and globally. The legal frameworks vary all over the world but the principles that need addressing are the same. The long-awaited US government report on copyright safe harbours in May summed it up in a word: there is a massive "imbalance" between the power and wealth of the giants and the rights and remuneration of the creator.

How should policymakers look to mitigate the impact of COVID-19 on creators? One commitment should be to protect and reinforce their rights, especially in the digital world.

This applies to all repertoires: for example, to audiovisual creators, screenwriters and directors, for whom the impact of COVID-19 is far greater because, in so many countries, they lack a fair right to remuneration. Governments can also help visual artists by adopting the resale right that provides crucial income to the creator when works are re-sold.

We've seen pop stars streaming their latest song live from their kitchen. Let's agree on one thing - however talented they are, it's boring. Boring! As a former pop star myself, I take the liberty to say that. It will never be a substitute for a packed stadium or a sold-out theatre performance in the West End or on Broadway. We must keep this in mind; without support, all this culture infrastructure may collapse and our societies will be poorer for it. I would go as far as to say that our societies, once rich in culture, will be grey and barren. It may sound alarmist, but I do believe that's where we are.

Unlike some other presidents around the world I humbly acknowledge the limits of my power. However global my outreach! But I will do anything within this limited power of mine to try and convince policymakers wherever I'm listened to, that the time for action, swift action, is now.

I've made it a habit to only quote myself when I'm reasonably sure it's to the point: "Without a song or a dance what are we?"



**We've seen pop stars  
streaming their latest song  
live from their kitchen.  
Let's agree on one thing -  
however talented they are,  
it's boring!**





# FOREWORD BY **MARCELO CASTELLO BRANCO,** CHAIR OF THE BOARD



© Tarso Ghelli

## **We must be a resilient global community to face challenges ahead**

This year, we have all been caught in a perfect storm. It has been an unprecedented year that has had such a profound impact on the creative community. The coronavirus pandemic has thrown into reverse our global growth, and its effects will be felt throughout 2021 and 2022. This report is about numbers, but numbers will hardly describe with reasonable accuracy what each and everyone has been going through in our sector.

What this report also shows is how our members around the world have risen to the challenge and responded proactively to their members' hardship. It shows societies' initiatives such as anticipating distributions, accessing social and cultural funds and allying with other industries partners in joint campaigns to serve and help their members, while putting in place measures to control costs and stay operational. At the same time our members have engaged governments to make sure they were aware of this unique situation and provided appropriate relief.

CISAC has been instrumental in identifying and reporting all these initiatives on a global basis. It is at the centre of a global community, sharing among its membership possible best practices and ways of dealing with the problems faced by songwriters, composers and publishers.

This troublesome period is clearly not over – but it is fair to say we are all building bridges to whatever comes next while staying positive and alert to future opportunities and challenges. The system of collective management, and its adaptability, has been strongly tested, and it has proved its value. On the positive side, digital revenue streams have proved important in helping compensate for the loss of physical and social creative activities. Digital growth, and new sources of digital revenue, will play a defining role in our future recovery.

This report reflects the deep sense of belonging to a global community. We are all dependent on each other. We are a resilient community as this report shows - and we will need our deep reserves of resilience as we face the challenges ahead.

The future of our sector has been reset by the COVID-19 crisis. We must now battle to stay in the game and be ready to support, represent and pay our right holders what they deserve and expect from all of us.

 **We are a resilient community as this report shows - and we will need our deep reserves of resilience as we face the challenges ahead** 



# FOREWORD BY **GADI ORON,** DIRECTOR GENERAL

©Philippe Zamora



## **COVID-19 has shown the unique value of collective management**

CISAC’s annual Global Collections Report always provides a unique overview of the state of creators’ royalties across the globe. In 2020, the Report continues to serve that purpose – but, in a world now turned upside down, it does so in a new and more relevant way.

The growth in creators’ collections in 2019 – up by an impressive 7.8% to more than EUR10bn – today feels almost like ancient history. In 2020, early forecasts indicate that total collections will fall between 20% and 35%. This amounts to massive losses of up to EUR3.5bn in royalties for creators.

This Report tackles the present crisis of 2020 head-on. It provides data and insight on the impact of the COVID-19 virus, broken down by sector and use, focusing both on 2020 and on the longer-term future. It also shows, through a series of case studies, the efforts taken by societies around the world to support their members through the crisis.

From the outset, societies have acted to defend their creators with all means available. They are providing emergency grants and advanced distributions, managing relations with users, lobbying hard for government support and working out new ways to licence live performances online.

So, while the current crisis is exposing the deep fragility of the collective management system, it is at the same time showing the vital importance of its work for creators.

At a global level, CISAC is also providing international support. We have engaged influential partnerships such as with UNESCO’s “ResiliArt” project, to foster global solidarity and keep creators’ needs at the top of governments’ agendas. Meanwhile, existing projects have become more important, such as the newly upgraded global music identifier (ISWC) to improve creator remuneration in the all-important digital market.

Looking ahead, this Report reflects extraordinary resilience across our sector, but not yet recovery. Things will get worse for creators before they get better, with loss of collections in 2020 translating into reduced distributions in 2021. While digital collections remain relatively immune from the pandemic, the live and public performance sectors that fuel around one third of creators’ royalties remain in a state of near shutdown.

There remains huge uncertainty going into 2021 and beyond. This Report aims to provide helpful knowledge for the whole sector as we navigate a path to recovery. I hope you find it useful and interesting.

**In 2020, early forecasts indicate that total collections will fall between 20% and 35%. This amounts to massive losses of up to EUR3.5bn in royalties for creators**

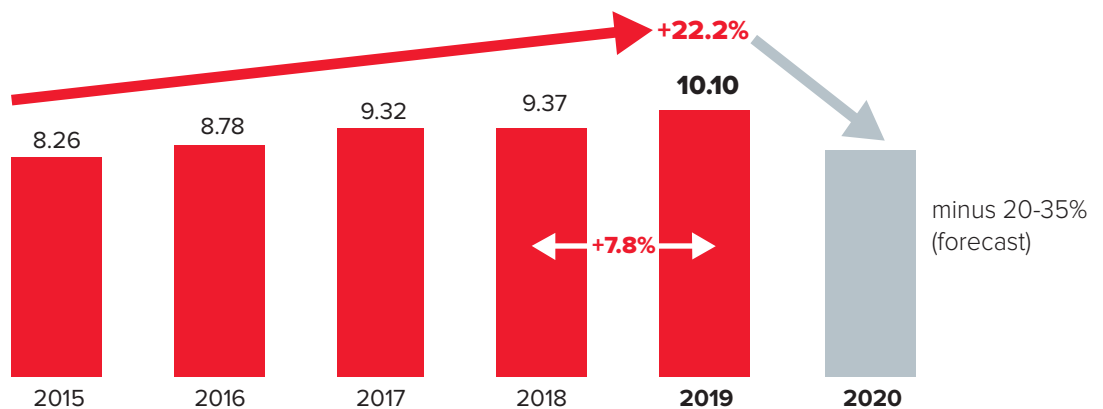
# CISAC GLOBAL COLLECTIONS REPORT: HIGHLIGHTS AT A GLANCE

## Global collections hit EUR10bn for the first time in 2019 but will slump in 2020\*

Global collections by CISAC member societies rose 7.8% in 2019. However, after five years growth, global collections for 2020 will slump due to the COVID-19 pandemic. Most societies predict falls of between 10% and 40% in 2020 and current information suggests an overall global decline in a range of 20-35%. This amounts to total 2020 losses of EUR2.0-3.5bn. Societies with lower digital collections will see larger declines.

### Collections (EUR billion) and annual growth

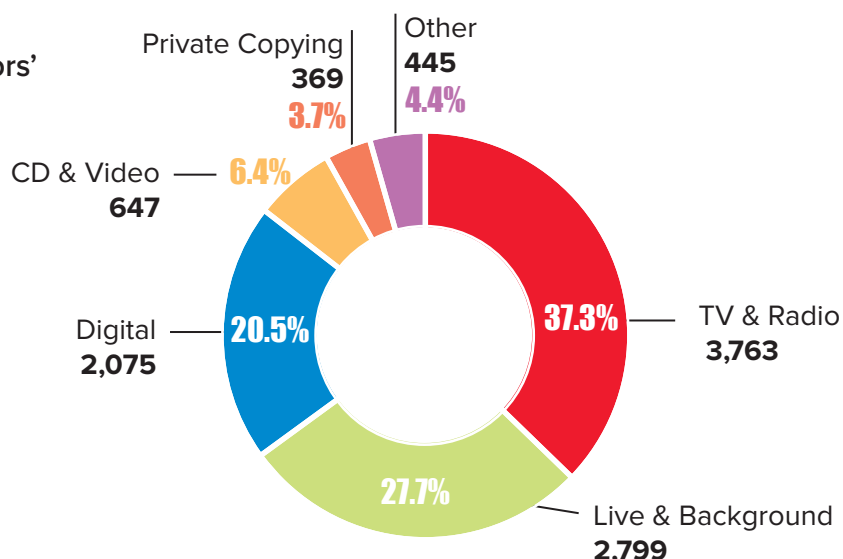
\* 2019 data excludes Spain due to the suspension of SGAE from CISAC. Previous years are restated to provide like-for-like comparison.



## Digital earns royalties of EUR2bn in 2019, but remains undervalued

Digital revenue continued to rise sharply in 2019, driven by increased streaming subscriptions and the strengthening of licensing agreements with digital platforms. Digital will remain resilient in 2020, helped by increased subscription streaming but remuneration of digital uses of creators' works is still undervalued, representing only one fifth of all collections globally. TV and radio remained the largest source of revenue, showing resilience despite the rise of digital. In 2019, a healthy concert and festival economy bolstered the live and background sector, but income from these sources will collapse in 2020.

### The global mix of creators' income streams in 2019 (EUR million)

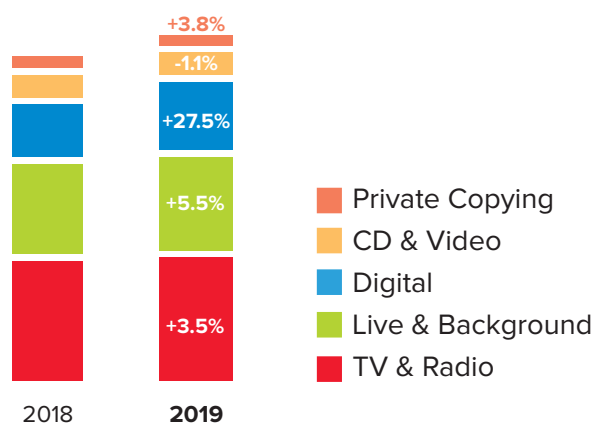




## Major income streams steady pre-pandemic but will see big falls in 2020

Broadcast and live and background are creators' largest income sources, at 65% of total collections. Remuneration from these two separate uses will see the sharpest fall in 2020. Digital has outpaced growth in other income streams, rising 27.5% in 2019 and 187% in the last five years. Earnings from physical formats have stabilised in 2019 thanks to a small but devoted niche audience.

### Major uses see collections growth



## Big collectors drive growth in 2019

A few major markets helped drive global growth in 2019, and all of those will see declines in 2020. Societies in major markets report widely varying decline forecasts, ranging from minus 11% in Canada (SOCAN) to minus 46% in Italy (SIAE). Switzerland entered the top 10 collecting territories in 2019, replacing Spain following the suspension of SGAE from CISAC membership.

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

Country	Collections 2019	Global share	Growth	Country	Collections 2019	Global share	Growth
UNITED STATES	2,201	21.8%	+13.6%	ITALY	605	6.0%	+3.8%
FRANCE	1,354	13.4%	+3.1%	AUSTRALASIA	345	3.4%	+6.1%
JAPAN	885	8.8%	+7.9%	CANADA	257	2.5%	+8.1%
GERMANY	868	8.6%	+7.7%	NETHERLANDS	233	2.3%	-1.1%
UNITED KINGDOM	821	8.1%	+11.0%	SWITZERLAND	223	2.2%	+22.1%

# CISAC GLOBAL COLLECTIONS REPORT: HIGHLIGHTS AT A GLANCE

## Music drives growth in 2019, but all sectors will fall sharply in 2020

Music was the largest and strongest collections sector in 2019. Audiovisual repertoire collections grew– in this sector, fair remuneration of creators is limited to territories granting an unwaivable remuneration right for audiovisual creators. Visual arts collections declined slightly in 2019. All repertoires will see big losses in 2020, the greatest damage being in public performance and live concerts.

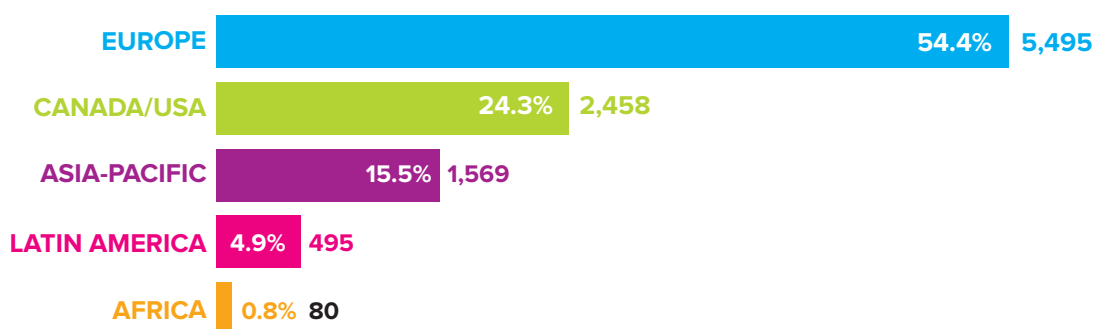
### Collections by repertoire, growth in 2019 (EUR million)

Type of Use	Collections	Annual Growth
Music	8,962	+8.4%
Audiovisual	597	+6.5%
Literary	197	-0.9%
Dramatic	175	+0.03%
Visual Arts	165	-1.9%

## Europe collects the most for creators

More than half the world's collections were generated in Europe in 2019. Strong growth in Canada/USA has increased its share while in Latin America and the Caribbean, exchange rate effects influence Euro currency growth. Africa and Asia-Pacific have a handful of large markets that lead their revenue collections.

### Share of global collections by region (EUR million)



# 2020 & COVID-19: IMPACT ANALYSIS

## How will the pandemic impact collections outlook in 2020/2021?

Coronavirus has had, and will continue to have, a dramatic impact on cultural and creative industries worldwide. It has struck at cultural, entertainment and hospitality sectors with a uniform impact globally and with long-lasting effects on royalty collections by Collective Management Organisations (CMOs).

A survey of projections by CISAC member societies indicates total worldwide collections for creators will decline by between 20-35% in 2020. This amounts to losses of EUR2.0-3.5bn with falls of up to 80% in the most affected business sector, live concerts and festivals and public performance by licensed venues and businesses. Most societies' estimated losses range from minus 10-40%. Societies with higher digital collections expect lower losses.

This study gives an overview of sectors using licensed creative works and the impact on collections. It also considers the impact on the wider creative industries, of which CMOs are an essential and heavily exposed part.

Finally, while showing the worldwide actions of CMOs to support creators, the study highlights the massive financial and political commitment needed from governments to help the global community of creators recover from the crisis.

**Most societies' estimated losses range from minus 10-40%**

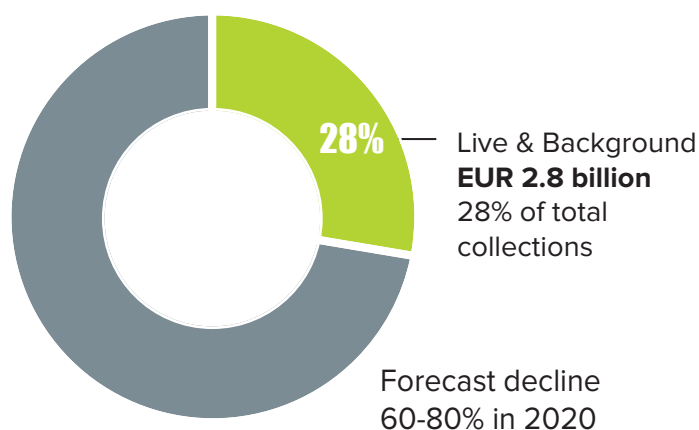
## Live and background bear the brunt

In 2019, the live and background sector represented around 28% of all collections by CMOs (approximately EUR2.8bn).

This income source – the second largest in terms of annual collections – has been the most impacted with collections down to almost zero from the start of the pandemic.

Based on 2019, a 3-month period without collections would mean almost EUR700m less revenue for creators.

2019 % and value of Live and Background



### Live events on hold

Concerts and festivals in 2020 have been at best postponed, if not cancelled. This, compounded by public's reluctance to join social gatherings in the future, has been very damaging to organisers. There is also uncertainty over the ability and willingness of artists to travel.

Theatre, dance and performance events rely on small organisations, many of which will struggle to recover from the cancellation of at least one entire season. At the other end of the scale, cancellations of major international events (e.g., Eurovision and the Olympics) have caused a negative ripple effect on collections by CMOs.

Live event organisers will see cancellations continue into 2021. Many structures and festivals are not covered by insurance, so smaller agencies in particular are threatened with bankruptcy. Artists are seeing reduced live production programmes, endangering independent creators.

Cancelled events generate zero royalties. These losses depend on the duration and scale of social distancing measures.

This situation has been partially compensated by live streaming events that do not require heavy productions, such as electronic music events that can be streamed from an empty club or studio. These are high volume in terms of audience, but generate low incomes for creators.

Live sector losses will continue in 2021 as it struggles for survival and events are scaled back to respect social distancing.



**Artists are seeing reduced live production programmes, endangering independent creators**



### Public performance to see slow return

In 2020, most governments ordered the complete or partial closing of public spaces. This includes users such as bars, restaurants, cinemas, cafés, discotheques, hotels, sports clubs and shopping centres. Collections from these users have been close to zero. The situation has been similar for museums and art fairs. Resale right royalties for visual artists paid by galleries and auction houses have ground to a halt.

In 2021, public spaces face the same uncertainty as event organisers, with some certain to close permanently. The longer the period of social distancing, the more this will reduce long-term attendance in public places where social distancing is difficult (e.g., bars, discotheques and museums). Many venues that use music are likely to reopen last, meaning a greater proportion going out of business.

Some users paying a yearly licence fee have asked for payment delays, discounted rates or full reimbursement – these have been widely accepted by CMOs. This creates a large volume of unpaid royalty bills, combined with a knock-on effect in 2021, as some users that already paid their 2020 fee will see a discount applied in 2021.

## Cinemas look to fill seats

Virtually all cinemas across the world closed for a significant period in 2020. In many European countries, lockdowns eased in the summer, a traditionally off-peak period for cinemas.

In Asia-Pacific, box office revenues dropped 91.9% for the first half of 2020, compared to the same period in 2019, according to S&P Global Market Intelligence and OPUSData. During the same period, China's box office fell 98.3% year-on-year while South Korea was down 78.5% (this decline was mitigated by drive-in cinemas). Japan declined 75.4% and Australia 73%.

Alternative approaches have been tested by US studios, such as Universal Pictures. Instead of postponing films, the company released them for rental on-demand.

Looking ahead, cinemas will not reach full capacity until after the end of social distancing. In addition, audiovisual production delays will create a supply shock that could see less films in cinemas and, in turn, smaller audiences in 2021-2022.

Lockdowns reduced royalties to close to zero for music and for audiovisual rightsholders in the few markets where CMOs collect from cinemas. A partial recovery of collections can be assured by partially filling seats through social distancing. This can avoid permanent closing of some financially fragile structures.

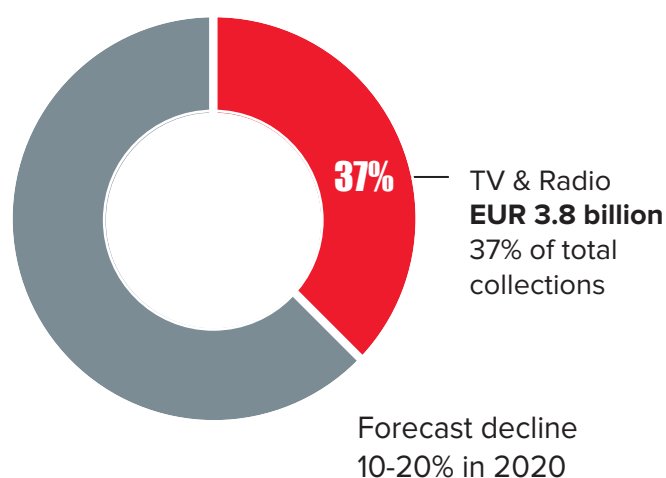
**Audiovisual production delays will create a supply shock that could see less films in cinemas**

## Broadcast sees advertising cutbacks

Broadcast, radio and cable retransmission are key collections sources, representing 37% of total worldwide collections in 2019, and worth EUR3.8bn. These sources are especially important for audiovisual creators, representing 68% of collections in 2019.

Public broadcasters are seeing varying impacts internationally. In developed economies where public finances are less dramatically threatened, public broadcasters are expected to maintain payments thanks to government support. In less developed economies, governments asked CMOs to reduce royalty amounts due by public broadcasters.

2019 % and value of TV and Radio



By contrast, commercial advertising-funded TV is strongly affected by declines in advertising revenues as budgets are cut in response to the crisis. This effect is amplified by the cancellation of sporting and music events, which attract high-value advertising slots. Ad-based TV is also threatened by a shift by consumers to VoD. The current crisis is accelerating this trend. Research firm Futuresource estimates over 12% decline in total TV advertising revenue worldwide in 2020. (see pages 20-21)

**Commercial advertising-funded TV is strongly affected by declines in advertising revenues**

Pay-TV has faced uncertainty in 2020, due in part to its heavy reliance on live sports. Entertainment channels could see slight growth in subscribers, potentially leading to higher collections. However, this is not expected to compensate for losses from other broadcasters.

## Broadcast revenues set to fall

Despite growth in audiences, broadcast revenues are expected to decline in 2020. As most licensing contracts with CMOs contain a revenue share tariff (i.e., a percentage of broadcaster revenues) royalties are expected to decline in line with ad and subscriber revenues.

Audiovisual productions, commissioned by broadcasters or produced by broadcasters or film producers and vital to audiovisual creators, have been put on hold during most of 2020.

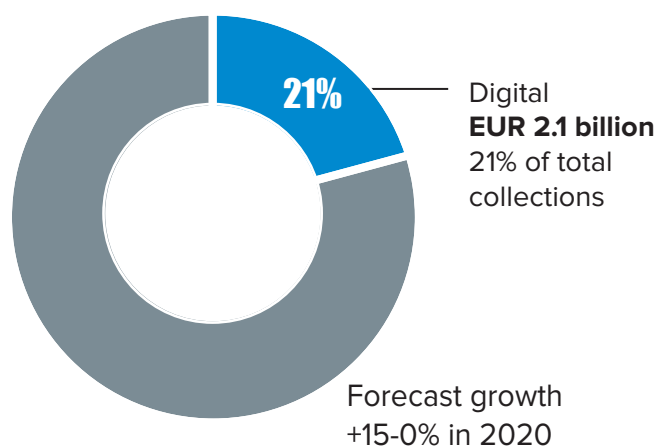
CMOs are working with broadcasters and producers to restart work on new episodes and screenplays. CMOs ensure producers respect their commitments to writing agreements and to payments due to authors.

As social distancing relaxes, producers are expected to commission new content. However, production costs will remain reduced in 2021, both to cut budgets and to make up for a shortfall of new content.

## Digital: streaming surges in lockdown

More than any other sector, online services are benefitting from social distancing but the rewards to CMOs and creators are limited. Increased subscription revenues will not offset the drop in other income sources. In 2019, only 21% or EUR2.1bn of creators' income for all repertoires comprised online sources.

2019 % and value of Digital



### Video on Demand grows

The sector most positively impacted by the crisis is Video on Demand (VoD). Netflix's subscriber base was up by nearly 26 million (+15%) at the end of June compared to the end of December 2019. Disney+ launched in new territories in end March/early April, adding over 21 million subscribers in just a few weeks.

The economic crisis will see some viewers reallocate their spending and subscribe to more limited tiers. It is inevitable that this growth will not continue at the same pace in 2021. The shift in consumption habits and the attraction of new viewers will nevertheless maintain a solid revenue base for VoD platforms over time.

### Music streaming

As lockdowns are implemented, music streaming services subscriptions have grown. Counterpoint Research expects that online music streaming subscriptions will grow more than 25% year-on-year to exceed 450 million subscriptions by the end of 2020.

As with Pay-TV and VoD, some subscriptions may be cancelled as household revenues decrease due to rising unemployment.

The extent to which creators will benefit from increased streaming of works depends largely on the bargaining position of CMOs and digital services. In many territories where royalty tariffs are either a low percentage of subscription revenue or a fixed yearly amount, it will become important for CMOs to renegotiate license contracts to account for the increased use of their members' works on VoD and music streaming platforms.

 **As lockdowns are implemented, music streaming services subscriptions have grown** 

In markets where music and video streaming are least developed, DSPs are reluctant to negotiate fairly with CMOs. In these cases, an increase in audiences does not lead to increased royalties.

In all markets, the increased consumption on online platforms leads to a more fragmented online market. This trend will continue as users discover new content sources. This highlights the need for transparent negotiations with all platforms to provide a fair share of revenues for creators.

### Licensing live streaming

CMO licensing of live streamed concerts is a notable innovation resulting from the COVID-19 crisis. While online live performances are commonly offered by artists and are free for consumers, CMOs have now moved to offer new license models for these initiatives. The focus is on the responsibility of platforms making these events available and the revenues they are liable to pay creators. Live streaming of physical events such as DJ sets, dance lessons and gym classes is becoming a new norm, and CMOs are working to raise awareness of the need for licencing and payment to creators.

### **Streaming of recorded events**

With venues closed since early 2020, concerts and events have been increasingly streamed online, including independent small-scale productions or retransmissions of past recorded events.

When public institutions or companies stream concerts and events from their catalogue, they have to license them. For example, theatrical companies make available recordings of drama performances online, often without a licence or asking for a licence without paying anything. Licences granted for live events can include a licence for live streaming, but rarely for online retransmission, which needs to include mechanical rights.


In certain cases, CMOs can apply a new lower tariff applicable during the period of the pandemic emergency to help theatres and cultural content providers make works belonging to their repertoires available online.

### **Conclusion: 2021 revenue loss**

Creators and CMOs face profound harm long into 2021 due to coronavirus. Collections in 2021 will remain below the level of 2019 due to the pandemic's lasting impact on users and to the fact that many 2020 payments were made before the crisis started. CMOs have responded with a range of support measures, including grants, loans, advanced distributions, advocacy support and new licensing initiatives. However, it will require massive programmes of government support globally to help creators, and the economic activity they underpin, recover from the COVID-19 crisis.

In 2021, the economy is expected to recover slowly with the threat of a global recession that may take months to years to recover. Businesses using creative works will either not reopen or have trouble paying, leading irrecoverable debt to rise and impacting revenues. CMOs worldwide will see collections decrease by hundreds of millions of euros.

The long-term revenue decrease for rightsholders will lead to a severe income loss and potential impoverishment of creators worldwide.



**It will require massive programmes of government support globally to help creators, and the economic activity they underpin, recover from the COVID-19 crisis**





# SOCIETIES' RESPONSE TO COVID-19: CASE STUDIES



©Bernard Gueit

## Australia and New Zealand: creators' economic value recognized

As Australia and New Zealand's governments acted to fight the virus, APRA AMCOS reacted quickly to lessen its impact on members and clients.

APRA AMCOS adopted a pragmatic approach with licensees, immediately advising that it would adjust their accounts during lockdown. When restrictions eased, it adopted a grace period before restarting licensee payments. The same approach had been taken weeks earlier when many businesses had suffered from the bushfires.

APRA AMCOS brought forward annual live performance distribution by six months, and an efficiency drive on collections, including job cuts, helped avoid significant admin fee increases. It also extended reporting for live performances to include Facebook, Instagram and YouTube.

After the New Zealand's government announced a NZD175m package to boost the creative sector in May, APRA AMCOS led a campaign to secure Australian Government support. It coordinated an open letter to the federal government signed by more than 1,000 music artists, workers and businesses which resulted in an AUD250m package for arts and entertainment, including live music, announced in June.

These packages recognise the economic importance of creative industries. The creative sector in New Zealand contributes nearly NZD11bn a year to GDP and 90,000 jobs. Live music in Australia generates AUD16bn in economic, civic and cultural benefits with every dollar spent putting three into the community, according to a University of Tasmania study.

APRA AMCOS ambassador Tina Arena says: ***“As the full impact of the COVID-19 crisis hit our industry, Australian artists came together like never before. Artists, managers, crew, songwriters, venues, publishers and labels united as one with a clear and urgent call to Government.”***



©Caroline Rokka

## Norway's “corona concerts”

When Norway's government imposed a complete ban on all physical concerts and events in mid-March because of COVID-19, TONO's members immediately looked to fill the void by moving the live music experience online.

As a series of “corona concerts” started to take place during lockdown, the Norwegian society quickly responded by establishing a new licensing model to ensure that its songwriters, composers and authors would share in the revenue from these streamed events. After an initial temporary tariff of 10% of income generated, a standard 12%

tariff was established, the normal rate for online music in Norway.

By mid-June, TONO had registered more than 750 streamed concerts, with 400 already licensed and invoiced. These generated income of more than EUR100k. While this amount does not come close to making up for the losses from the cancellation of physical concerts and festivals because of lockdown, it is a significant new source of income.

Cato Strøm, TONO's CEO, says: ***“Overall, this is important income for our members in a very, very harsh and severe time for them. They've lost their income overnight and they are struggling. We tried to facilitate both the distribution side and also generate some income revenue.”***



## “Actions speak louder than words” for PRS for Music

After a record-breaking 2019, PRS for Music has worked to safeguard members with financial support, licensing innovations and other measures. **“We are doing everything we can to maximise return and minimise risk to future distributions for all of our members through this period of significant disruption,”** says CEO Andrea C. Martin.

The UK society acted swiftly after lockdown restrictions began, with an Emergency Relief Fund making available grants of up to GBP1,000 to members suffering immediate hardship.

Over GBP2m was distributed to more than 4,500 applicants.

PRS also delivered further positive news by paying out over GBP368m in the first half of the year, 13% higher than 2019 which was a record year. Live performance royalty processing was prioritised and online revenue data processing was increased to ensure the time from stream to payment was minimised wherever possible.

Alongside sister society PPL, PRS introduced special measures to ensure that public performance licensees were not going to pay for music while they were forced to close due to the pandemic. For other licensees, it ensured that income continued to come in.

PRS played a key role in industry calls for government support, leading to an unprecedented GBP1.57bn (EUR1.73bn) package for the UK’s cultural sector.

**“We must support the songwriter and composer community during these unprecedentedly difficult times, without them the music industry will not have a future”,** says Martin. **“The pandemic has rapidly accelerated the shift to a more digital world, and we must realise these possibilities and ensure that music creators benefit from the new music landscape.”**



## Visual artists get support “in dark times”

With visual artists suffering a collapse in income in 2020, societies have given financial support and demanded government assistance.

In the US, **Artists Rights Society (ARS)** issued a call to action to the Federal Government for a USD20k financial bailout of each working visual artist in the US. The call, backed by an online petition, gathered over 3,000 signatures. "A clear majority of Americans wants to support the country’s artists in these dark times. Unfortunately, this support has not yet been reflected by Congress", the petition said.

French visual arts society, **ADAGP**, continued paying royalties and steered members to funding programs. Emergency funds of around EUR750k, were contributed to the National Centre for Fine Arts (Cnap) and the National Book Centre (CNL) in partnership with SGDL. ADAGP has lobbied for a support system for artists, increased protection for the exposition of works and stronger negotiating power with major digital service providers.

In Australia, **Copyright Agency** launched a COVID-19 emergency fund of AUD500k to support members. It also brought forward AUD1.8m in Cultural Fund grants planned for 2021 distributions, and ensured continued payment of royalties, with AUD114m paid at the end of the 2019/20 financial year. Of the AUD500k, a sum of AUD35k was made available for photographic and other visual documentation of the crisis for publication in journals and exhibition in a major gallery. Copyright Agency also worked with galleries and others to facilitate online use and grant flexible payment terms.



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## Anitta leads calls on government in Brazil

Brazilian music star Anitta has served as a powerful and persuasive voice during the crisis by highlighting the financial turmoil COVID-19 has had on many creatives.

The singer-songwriter was among the panelists in May at a ResiliArt debate, organised by UNESCO with CISAC, where she and others called on policymakers to place creators at the heart of their recovery strategies.

***“Many think that this world is composed only of rich artists and composers. What they may not know is that a huge part of this universe is made up of people who are starting out, who work behind the scenes. It is the duty of public administrators***

***to think about how to encourage creators of culture to continue doing what they have done, offering alternatives to people, without having to worry about fighting their financial needs,”*** she says.

UBC, ABRAMUS and other Brazilian societies have also played an active role in government lobbying efforts, which included sending a joint letter in April to the country’s Secretary of Culture to press for economic support for music creators.

UBC joined forces with Spotify for the launch of a fund called Juntos Pela Música (Together For Music) in which each partner contributed BRL500k (EUR84k). By June the fund had raised BRL1.6m (EUR268k) and helped 1,000 creators.

Among other measures, the Brazilian societies brought forward some distributions and worked with music publishers union UBEM on new licensing rates, which covered a series of hugely-popular concerts that were performed by Brazilian artists and live-streamed on YouTube.



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## Spain: DAMA survey shows audiovisual creators losing half income

When the crisis broke, Spanish audiovisual society DAMA published an instant survey showing how COVID-19 was going to devastate creators’ incomes. The results helped craft a package that included more than EUR500k of aid, the majority non-refundable.

The survey discovered that 51.3% of screenwriters and directors were self-employed.

62% of authors were impacted by the state of emergency in Spain. Additionally, authors expected revenues to drop by 52% as a result of the shutdown of cultural activity.

The survey has helped target support measures offered by DAMA to its members. These include monthly financial supplements, with additional support for families with three or more children. Advances of up to 80% of rights were paid.

Collections from private copying and streaming revenues from VoD platforms in Spain have been essential to weathering the crisis. DAMA has lobbied the Spanish government and the EU to keep pressure on platforms to fully honour the payments due to creators.

With many creators left out of official aid packages, DAMA has made it an urgent priority to finalise the Artist’s Statute in Spain to reinforce the fiscal, labour and social security elements for creators.

DAMA President Borja Cobeaga, says: ***“The crisis hit creators very suddenly, and our response was to act quickly. As a society, DAMA has stood by the side of authors in a critical moment developing a number of ad-hoc social support measures specially made to mitigate the effects of COVID-19”***.



Mario Mitrotti  
President DASC



Alexandra Cardona  
President CEO REDES

## New CISAC societies weather the storm in Colombia

In 2018/2019, two of CISAC's newest members, Colombian societies, DASC and REDES, celebrated their distributions to audiovisual creators. A year or two later, COVID-19 has turned the world upside down as the two societies help their new members, screenwriters and directors, survive the impact of the crisis.

DASC and REDES were born from the 2017 "Pepe Sanchez" law granting an inalienable right of remuneration to audiovisual creators.

In October 2019, the two societies signed agreements with television networks Canal RCN and Caracol Televisión. Collections from these users have proved to be essential sources of funding for creators during the crisis.

This income, combined with reciprocal agreements with DAC and SACD in Argentina and France, have helped DASC support its 186 members. Assisted by the regional audiovisual authors federation FESAAL, DASC has provided distributions and subsidies to members. **"Our greatest challenge is to continue developing our activities even in this crisis,"** says President Mario Mitrotti.

REDES has user agreements providing distributions to its 250 members and sister societies. It has granted two subsidies and enacted a social welfare programme including cover for unemployment, healthcare and studying support. Its #PagarPaga social media awareness campaign explained right payments for creators to the public.

Societies are providing much more than just collections, says REDES President Alexandra Cardona: **"It is a commitment to guarantee the well-being of creators"**.



## Swift government support provided in Morocco

The Moroccan creative sector has been hard hit by the COVID-19 pandemic. Its response at national level was supported at international level by the "ResiliArt" initiative, organised by UNESCO in partnership with CISAC.

Morocco is Africa's largest collector of private copying levies. When these and other income streams fell, CISAC's member society, the Moroccan Copyright Office (BMDA) in partnership with the supervisory ministry responded by swiftly paying out advanced royalties in March, April and June. The CISAC African Committee (representing societies in 32 countries) had also written to the Moroccan Minister of Culture, Youths and Sports, Othman El Ferdaous recommending emergency measures to support CMOs emergency actions.

The letter reaped results. A program launched by the Minister of Culture included USD3.65m (MAD35.4m) to pay all remaining distributions due for the 2020 fiscal year, for the lyrics, dramatic and literary repertoires. Distributions were made by BMDA, following guidance from CISAC and the UNESCO ResiliArt program. BMDA is actively lobbying for the reform of Morocco's copyright law to strengthen existing rights and integrate new rights.

Despite the crisis, BMDA, in close collaboration with WIPO experts, was able, for the first time, to distribute related rights through the WIPO Connect system during the first week of August.

**"BMDA has done everything it can to support its authors as they struggle to survive"**, says BMDA's Acting Director, Dalal Mhamdi Alaoui. **"BMDA is grateful to the Moroccan government, particularly to the Minister of Culture, Youth and Sports for the support to BMDA and Moroccan authors."**



## Sacem puts solidarity at the heart of its action

When France went into lockdown in March 2020, French society Sacem took immediate measures to ensure the continuity of its operations and its services to members, in particular royalty distribution even if offices were closed. From then on, Sacem's management and board multiplied emergency initiatives to provide relief to members while alerting the French government and European authorities to ensure that relief packages would include measures for creators and the wide industry.

Sacem set up a EUR43m to respond to dire situations through direct aids (EUR6m), to secure members' income over the long term through exceptional advances (EUR36m) and through an increase (EUR1m) of the existing support programme for music publishers. Due to the cancellation of concerts and the closure of public places that play music, Sacem decided to introduce a new scheme to remunerate rights holders for livestreams.

***“Like many others our members suffered a loss of revenue during the lockdown”*** warned Sacem's CEO Jean-Noël Tronc, ***“But the drop in royalties will be felt mainly in 2021. We estimate that the overall drop in royalty income will be EUR250m for 2020, 23% under our collection forecasts.”***

To cope with this dramatic situation, Sacem set up a plan to reduce its operating costs .

Externally, Sacem took special measures to support music users overcome the crisis, such as the suspension of all invoicing and licensing contracts for bars, clubs, and other businesses.

***“Solidarity is at the heart of Sacem's values,”*** said the chairman of the Board Bruno Lion. In these difficult times, the meaning of this commitment shines through.



## ASCAP fights for relief measures for members

After seeing early COVID developments in other countries and anticipating the U.S. impact in late January 2020, ASCAP began testing its remote systems capabilities and coordinating disaster recovery plans with its network of global vendors in order to ensure a smooth transition to remote functions prior to the nationwide and key offshore location lockdowns. Cloud migration and wholesale technology upgrades in prior years made the transition possible and ensured stability of both licensing and distribution functions.

In an effort to support creators in need, ASCAP immediately set up major member support initiatives through its Music Unites Us website providing vital information to help its members cope with the COVID crisis and donated to a special fund for music creators as part of the MusiCares COVID-19 Relief Fund. ASCAP was a leading music industry voice in support of legislation such as the CARES Act and the Small Business Administration's COVID-19 loan programme, urging Congress to ensure that critical benefits were extended to self-employed individuals such as songwriters and composers.

In response to social unrest, ASCAP launched its Fight For Change action agenda for racial equity, social justice and police reform, including donating to racial justice organizations and advocating for State and Federal legislation to ensure accountability and transparency in policing.

As ASCAP CEO Elizabeth Matthews has put it in messages to members: ***“ASCAP is laser-focused on navigating through COVID-19 and economic recession challenges on behalf of our members no matter how long these conditions last. Our ASCAP members are worth fighting for, and on behalf of all ASCAP employees, we promise you that we will do whatever it takes to fight for you.”***

# MIXED FORTUNES FOR TV & VIDEO IN 2020/2021

By David Sidebottom, Principal Analyst, Entertainment, Futuresource



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The television and video sector began 2020 with good reason to be confident that the momentum of the digital revolution from 2019 would continue, with new entrants joining the market and business models diversifying, increasing consumer choice. In 2019, streaming video content helped total video entertainment spend reach USD284bn worldwide, up 2% on 2018, whilst traditional broadcast continued to be challenged.

Then the global pandemic and lockdown measures hit, disrupting every aspect of the television and video sector. Lockdown in 2020 has impacted in different ways, with winners and losers among the different consumption models.

## The initial impact

First, there was an immediate impact on in-home video entertainment consumption as consumers' free-time soared. **Subscription Video on Demand (SVoD)** in particular witnessed the largest increase in consumption in key markets. However, in terms of revenue, overall streaming video fortunes were mixed; Paid-for video streaming saw a massive boost, while overall ad-funded streaming income declined. Digital rentals and purchases hit record levels, helped by early releases, but DVD and Blu-ray sales fell due to the closure of stores.

For **television broadcasters**, this period was uncharted territory. Viewing and audience figures were impressive, with some markets rising by up to 50% in April. However, advertising revenues were significantly impacted, declining by as much as 50%. Wider consumer spending and, in turn, advertising spend ground to a near standstill. The cancellation of live sports hit Pay-TV broadcasters hard, leading to lower revenues and small levels of customer attrition.

**Theatrical box office** was the hardest hit sector, with cinema closures causing revenue to plummet to zero. The sector's difficulties continue into the second half of 2020 and potentially 2021, when a boost from delayed releases will be offset by consumer apprehension, social distancing and the delayed impact of a shut down in production from 2020.

## Returning to a "new normal"

Looking at the overall prospects for 2020, these will also likely be polarised. The uptake of all digital services, whether free, subscription or transaction-based, will slow as lockdown measures ease and the boost from newly-launched services wears off.

The focus for **SVoD services** is expected to shift to retaining existing users later in 2020, with new subscriber uptake likely to be more muted. Even so, the impact of new SVoD services such as Disney+, combined with existing services, will provide a strong basis for SVoD consumer spend growth in 2020 and 2021.

**A recovery in video entertainment consumer spend is expected, with 12% total growth projected in 2021 after the 9% decline in 2020**

## MIXED FORTUNES FOR TV & VIDEO IN 2020/2021

For **digital rental and purchases**, cinema closures and a lack of content in the creative pipeline will continue to impact the availability of new release movies in the second half of 2020. Consumer fatigue for these services can also be anticipated. Many gains from the first half of 2020 could be counteracted by the lack of compelling content in the second half of the year.

The **TV broadcast sector** in 2020 is also likely to witness mixed fortunes. Prior to COVID-19, TV advertising revenues were experiencing marginal year-on-year declines, whilst Pay-TV subscriptions were steady or marginally declining in many markets. However, recovery was evident in the broadcast sector entering the second half of 2020, with TV advertising performance steadily improving.

Many Pay-TV operators are seeing a return to close to previous subscription levels in the second half of 2020 after the return of live sports. Overall, both TV advertising revenue and Pay-TV consumer spend are still expected to decline, by over 12% and 7% respectively, in 2020.

### Looking beyond 2020

Despite the anticipated global recession, a recovery in video entertainment consumer spend is expected, with 12% total growth projected in 2021 after the 9% decline in 2020. However, Futuresource's "Living with Digital" consumer survey, published in August 2020, highlights that over 40% of respondents in key markets stated they think they will be financially worse off due to COVID-19. As the pandemic gives rise to a global recession, caution should be advised in relation to future performance in the video and television sectors. In previous recessions, video entertainment has been somewhat recession proof. However, the present recession's impact on video entertainment consumer spending may also be increased by the availability of free and low-cost streaming alternatives and the ease in which consumers can cancel or switch services.

**SVoD growth** will be lower in 2021, as many consumers had already signed up in 2020, whilst also becoming increasingly savvy in managing multiple subscription services. Established SVoD consumers will seek new content and improved experiences, whilst strong growth in underdeveloped markets is likely. Futuresource has adjusted upwards its longer-term forecasts for SVoD as a result of COVID-19.

**Pay-TV** consumer spend will recover close to previous levels in 2021. However, COVID-19 has brought into focus the sector's existing challenges, as competition with online alternatives and the potential for migrating away from higher priced tiers is significant.

### Uncertainty remains

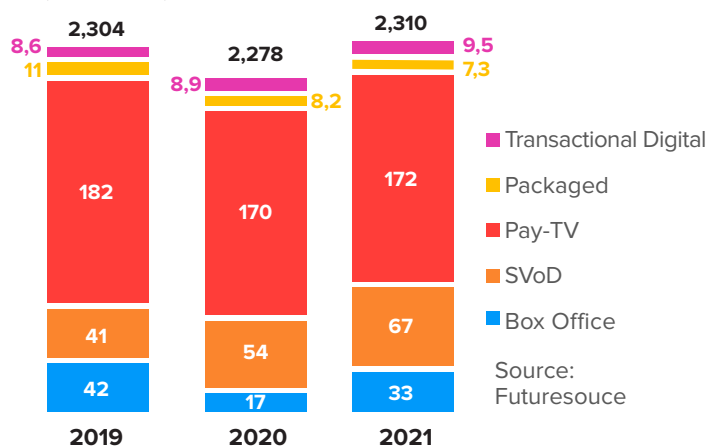
Overall, the pandemic has accelerated adoption of digital video, enhanced the diversity of the sector and helped many services expand beyond their typical audience demographic. Now, the challenge for digital video services is to maintain engagement.

In the overall online viewing mix, **emerging advertising funded VoD (AVoD)** services and **free broadcaster VoD (BVoD)** services will continue to play an increasingly important role, complementing other OTT content consumption whilst contributing to the erosion in traditionally delivered television.

Entering 2021, no forecasting can be guaranteed: additional waves of infections are already being seen in some countries. Caution will be natural for many in 2021, with the only certainty being uncertainty.

## Global Video Entertainment Spend

(US\$ Billion)



# MUSIC REPERTOIRE

## EUR8.96bn +8.4%

### Growth in 2019 but sharp falls in 2020

Global music collections increased by 8.4% to reach almost EUR9bn in 2019. This represented a 24.7% rise over the past five years – a trend certain to be sharply reversed in 2020 due to COVID-19.

TV and radio remained the largest source of income in 2019. Despite pressure from broadcasters, this sector proved resilient and grew 4.5%, helped partly by exchange rate effects in large non-euro markets. In Norway, authors' society TONO successfully concluded its EUR9m Supreme Court case against RiksTV. In Italy, a satellite TV back payment added more than EUR15m in broadcast royalties.

Live and background income was boosted by a thriving live music scene, particularly in festivals and large concerts. Increased licencing of users helped boost public performance income in some markets. In the USA, some 16,500 new businesses were added to BMI's roster while in the UK, "TheMusicLicence", a new joint venture between PRS and PPL to collect performance and neighbouring rights royalties, became fully operational. This initiative helped to deliver more than EUR36m of growth.

Private copying remained a small but significant revenue stream with substantial growth potential. Only 74 countries currently have private copying legislation in their national laws. In 2019, creators in just 31 of these territories saw an income from this source.

#### Top 10 collecting countries\*

UNITED STATES	ITALY
FRANCE	CANADA
JAPAN	AUSTRALASIA
GERMANY	NETHERLANDS
UNITED KINGDOM	BRAZIL

\*Breakdown of values on pages 35-40

#### Europe collects 50.4% (EUR billion)

Repertoire	Collections	Share
EUROPE	4.52	50.4%
CANADA-USA	2.45	27.4%
ASIA-PACIFIC	1.47	16.4%
LATIN AMERICA	0.45	5.0%
AFRICA	0.07	0.8%

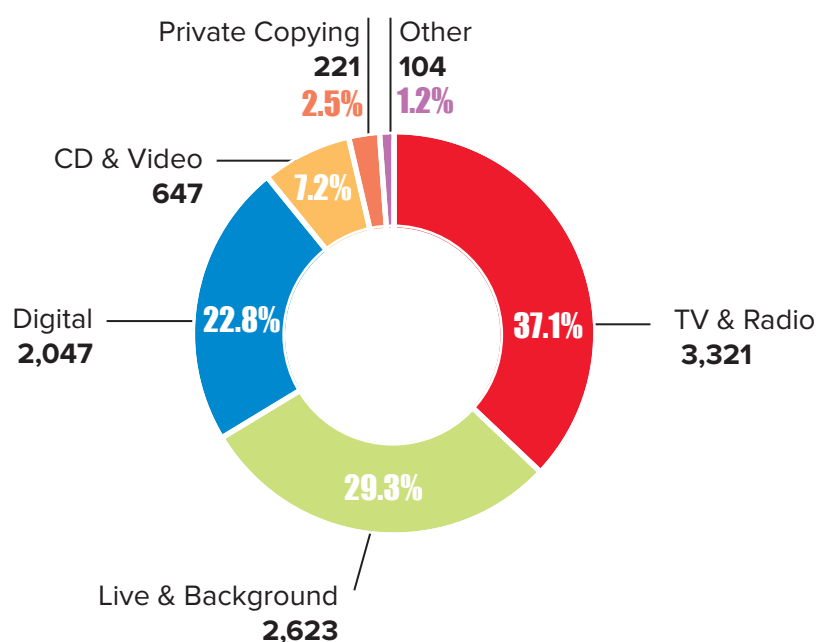


## Subscription helps digital rise

Digital music revenues rose by 27.2% in 2019 and have grown strongly over five years, driven by increased music subscription and new deals with platforms globally. A study by Counterpoint Research reported a 32% increase in music subscription. New and renewed licensing deals by societies, with YouTube, Facebook, TikTok, Amazon, Twitch and others, helped drive digital growth. However, creators' digital revenues remain a disproportionately small share of total collections at only 22.5%.

Thanks to CMOs' digital licensing drive, some 20 territories received over one-third of their income from digital sources during the year. In China, this share reached 58%.

## Share of music collections by use (EUR million)



## Digital Music Champions

Highest shares of digital collections among the top 20 markets.

MEXICO	54.0%
SWEDEN	43.6%
SOUTH KOREA	41.8%
AUSTRALASIA	41.3%
CANADA	37.2%

## Breakdown of music collections (EUR million)

Use	Collections	Growth
TV & Radio	3,321	+4.5%
Live & Background	2,623	+5.6%
Digital	2,047	+27.2%
CD & Video	647	-1.1%
Private Copying	221	-11.0%
Synchronisation	30	+15.1%
Rental/Public Lending	15	-9.3%
Publication	6.4	-0.7%
Other	52	+20.2%

# AUDIOVISUAL REPERTOIRE

## EUR597m +6.5%

### Legislative gaps hold back digital income

Global collections on behalf of audiovisual creators, such as screenwriters and directors, grew by 6.5% in 2019. TV and radio broadcasters are substantially the largest users, accounting for 67.8% of global audiovisual collections. These sectors have been badly impacted by the pandemic and 2020 collections will fall sharply. The relative weakness of the global legal environment means that collections from digital sources, though rising, remain very small at 3.7%. This puts audiovisual creators at a serious disadvantage in the 2020 COVID-19 crisis, where creators have become increasingly reliant on digital income and monetisation opportunities from services such as Amazon, Netflix, YouTube and Apple TV.

Collections for live and background grew by 38.0%. Almost half of this increase came from Spain as local society DAMA's membership expand. Private copying income rose 48.2%, supported by a large back payment in Switzerland.

#### Top 10 collecting countries\*

FRANCE	SPAIN
SWITZERLAND	RUSSIAN FED.
ITALY	GERMANY
ARGENTINA	FINLAND
POLAND	NETHERLANDS

\*Breakdown of values on pages 35-40

#### Audiovisual collections reported by region (EUR million)

Repertoire	Collections	Share
EUROPE	558	93.6%
LATIN AMERICA	37	6.1%
AFRICA	1.7	0.3%
ASIA-PACIFIC	0.04	0.01%
CANADA-USA	0.03	0.01%

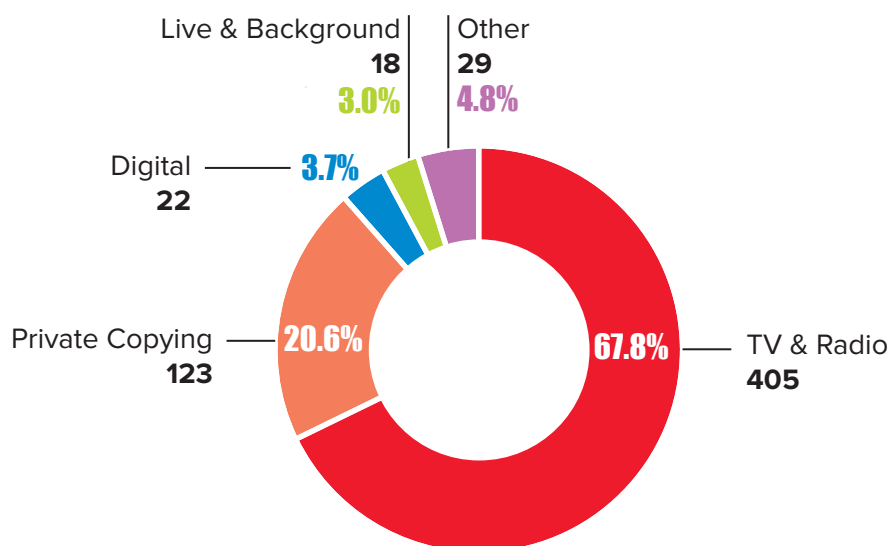
## Progress in Latin America and Europe

Ensuring a regular income flow for audiovisual creators by CMOs depends critically on adequate legislation, with income generated only in territories that grant a fair unwaivable right of remuneration. A limited number currently grant this right. There was progress in 2019, however. The Colombian courts validated the “Pepe Sanchez” law following a legal challenge and allowed audiovisual collections to begin for the first time. Uruguay became the third country in Latin America to put a remuneration right for audiovisual creators into law.

In Europe, following years of campaigning, the EU Copyright Directive was adopted in April 2019. This established the essential principle of proportionate remuneration for audiovisual creators, a landmark signal. Societies need urgent implementation of the Directive by EU Member States.

In Latin America and the Caribbean, audiovisual campaigners’ success in Colombia allowed REDES and DASC (CISAC’s two newest member societies) to begin collecting royalties that added more than EUR630k to collections. Uruguay’s, which also has a new remuneration right, saw a 31.9% national increase.

### Share of audiovisual collections by use (EUR million)



### Breakdown of audiovisual collections (EUR million)

Use	Collections	Growth
TV & Radio	405	-3.3%
Private Copying	123	+48.2%
Digital	22	+69.0%
Live & Background	18	+38.0%
Educational Use	5.2	-2.4%
Mechanical Reproduction	1.4	-37.7%
Rental/Public Lending	1.2	-16.1%
Reprography	0.2	+24.4%
Other	21	-11.2%

# VISUAL ARTS REPERTOIRE

## EUR165m -1.9%

### Resale right grows in 2019 but faces sharp fall in 2020

Royalty collections for visual artists reached EUR165m in 2019, slightly down on the previous year. Income from the artists' resale right grew by 7.4% to become the largest single source of visual arts royalties revenue for the first time. However, this income stream is likely to see substantial losses in 2020 with sharply reduced activity due to the COVID-19 crisis.

The resale right enables artists to earn a share of the proceeds when their works are resold by auction houses and galleries. In 2019, the right generated 28.2% of global visual arts collections by CISAC member societies. Most of this growth came from the two largest resale right collecting countries: France and the UK. Initiatives such as UK society DACS' #FairShareforArtists campaign helped bolster collections. In the longer term, resale right collections will grow with wider implementation of the right internationally – an objective campaigned for by CISAC in the World Intellectual Property Organisation (WIPO). Currently the resale right exists in more than 80 national markets.

Total visual arts revenue declined 1.9% in 2019, affected by a 13.8% fall in reprography without which the total would have risen by 3.0%. The global arts market value declined 5.0% in the year, as reported in a UBS and Art Basel study.

#### Top 10 collecting countries\*

FRANCE	NETHERLANDS
GERMANY	DENMARK
UNITED KINGDOM	UNITED STATES
SWEDEN	SPAIN
ITALY	BELGIUM

\*Breakdown of values on pages 35-40

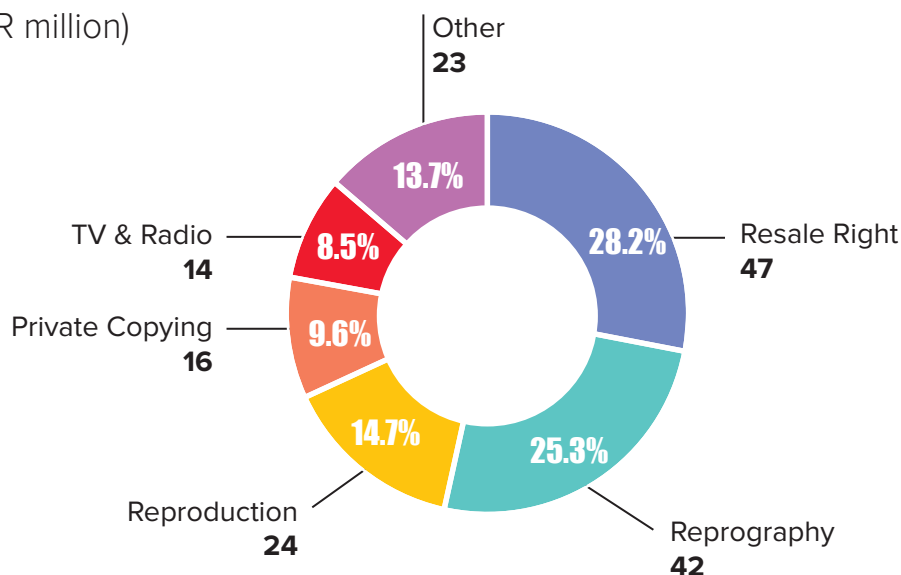
#### Visual arts collections reported by region (EUR million)

Repertoire	Collections	Share
EUROPE	153	92.4%
CANADA-USA	7.2	4.4%
ASIA-PACIFIC	4.9	2.9%
LATIN AMERICA	0.4	0.2%
AFRICA	0.08	0.05%

Visual artists are severely under-remunerated in the digital sector, disadvantaged by a weak bargaining position in negotiations with online platforms. This makes visual artists especially vulnerable to the impact of the COVID-19 crisis in 2020. Royalties generated by the use of visual works on digital platforms provide just 3.4% of total collections despite a 26.4% growth in 2019. Societies are seeking fairer rates and lobbying for stronger rights via legislation such as the European Copyright Directive. They are also improving digital tracking of artists' work with the Automated Image Recognition (AIR) tool involving CISAC, ADAGP and other societies. Four new visual arts societies joined the AIR programme in 2019.

Private copying remuneration accounts for nearly 10% of visual artists' royalties. This sector rose 4.9% in 2019, helped by a large back payment in Belgium. Private copying remuneration depends on legislation and enforcement by governments, a strong focus of many visual arts societies' lobbying efforts.

**Share of visual arts collections by use (EUR million)**



**Breakdown of visual arts collections (EUR million)**

Use	Collections	Growth
Resale Right	47	+7.4%
Reprography	42	-13.8%
Reproduction	24	+2.3%
Private Copying	16	+4.9%
TV & Radio	14	-4.9%
Live & Background	5.8	-3.0%
Educational Use	5.8	-11.5%
Digital	5.6	+26.4%
Rental/Public Lending	4.4	+3.7%
Other	1.0	-43.1%

# DRAMATIC REPERTOIRE

## EUR175m +0.03%

### Drama collections steady in 2019, facing severe cuts in 2020

Creators' royalties from the use of dramatic works rose marginally to EUR175m in 2019 but will have collapsed disastrously in 2020 due to social distancing and theatre closures forced by the COVID-19 crisis. Live theatre generated 85.8% of the drama collections and grew by 1.0% in 2019.

The three largest collecting countries remained as Italy, France and Russia generating 35%, 34% and 10% of the total in 2019. The gap between the top two narrowed substantially in 2019 following strong theatre attendance in France during the first half of the year.

Argentina is a significant collector in this sector. Revenue grew 12.2% in local currency in 2019 but was down in euros due to exchange rates.

TV and radio accounts for 11.0% of drama collections and showed an 8.8% fall in 2019. This was largely a correction following a 2018 satellite TV back payment in Italy. Private copying revenue grew by 8.0% with a successful negotiation in Switzerland adding 30.6% to their collections from this source.

#### Top 5 collecting countries\*

ITALY
FRANCE
RUSSIAN FED.
SWITZERLAND
ARGENTINA

\*Breakdown of values on pages 35-40

#### Breakdown of dramatic collections (EUR million)

Use	Collections	Growth
Live & Background	150	+1.0%
TV & Radio	19	-8.8%
Private Copying	3.5	+8.0%
Rental/Public Lending	1.1	+33.5%
Digital	0.1	-21.3%
Mechanical Reproduction	0.1	-8.9%
Other	0.8	-10.1%

# LITERARY REPERTOIRE

## EUR197m -0.9%

### Reprography leads royalty streams for writers

Royalties in the literary repertoire experienced a slight downturn in 2019, shrinking by 0.9% to reach EUR197m. The sector has grown 7.3% over the past five years. The largest source of revenue for literary creators was from reprography which made up 80.6% of the total and fell by EUR0.9m.

Globally, Australia remained the largest collecting territory at 44.7%, followed by the UK, Finland and Switzerland at 14.9%, 9.7% and 8.2% respectively. Half of countries saw growth in 2019 with Switzerland, Austria and Belgium performing best. Together they added EUR2.9m to the sector total with the latter generating exceptional revenue from private copying.

Rental and public lending made up 10.3% of the total and was also affected by a decrease in the Netherlands where collections fell by 16.5%. The largest growth was in educational use which increased by 10.9% but made up just 1.9% of the repertoire total.

The overall slight royalty decline was driven mainly by a fall in revenues in Australia. The remaining decrease in reprography was in the Netherlands where an agreement will see delayed collections restarting in 2020.

#### Top 5 collecting countries\*

AUSTRALIA
UNITED KINGDOM
FINLAND
SWITZERLAND
AUSTRIA

\*Breakdown of values on pages 35-40

#### Breakdown of literature collections (EUR million)

Use	Collections	Growth
Reprography	159	-0.6%
Rental/Public Lending	20	-8.1%
Private Copying	5.5	-2.8%
Educational Use	3.7	+10.9%
TV & Radio	3.6	+1.9%
Live & Background	1.8	-4.3%
Mechanical Reproduction	1.3	-10.4%
Digital	0.3	-
Other	1.7	+41.8%

## EUROPE



46 countries



105 members

**+6.5%****EUR5,495m****Sharp falls in 2020 will follow 6.5% growth in 2019**

Creators' royalty collections in Europe grew by 6.5% in 2019 to reach a total of EUR5.5bn. This figure will be sharply down in 2020 due to the pandemic. In 2019, digital growth combined with steady increases in the two largest revenue streams, TV and radio and live and background.

Broadcast collections in 2019 were resilient despite the rapid growth of digital uses, led by subscription streaming and VoD. TV and radio remain the top use in Europe with a 35.0% share and returned to growth in 2019 with an increase of 3.9%. The rise was helped by successful litigations taken by societies in Italy and Norway.

Live and background collections accounted for 34.2% share and grew 5.9%. However, revenues in this sector have since been devastated by the 2020 lockdown. The 2019 data shows a healthy income stream, with concerts and festivals helping to adding an extra EUR103m and 38 of the 45 reporting countries seeing growth. In the UK, the launch of a new PRS/PPL licence helped deliver a 16.7% increase in collections.

Digital collections grew strongly by 29.2% in 2019 led by Germany, France and the UK. However, digital revenues for creators are still disproportionately small, contributing just 16.7% of the region's total in 2019.

Collections in Central and Eastern Europe totalled EUR468m in 2019 – up 7.5% and accounting for 8.6% of Europe's total. Digital collections leaped by 48.1%, but digital remains a substantially smaller market segment than the European average, at just 3.8% of total collections. With slower uptake of subscription services, the region is more reliant on broadcast, live and background and private copying collections, although these sectors are held back by often hostile copyright conditions.

**Breakdown of regional collections**

(EUR million)

Repertoire	Collections	Growth
Music	4,519	+6.7%
Audiovisual	558	+9.6%
Dramatic	164	+2.8%
Visual Arts	153	-2.1%
Literary	101	+1.3%

**Collections in Central and Eastern Europe**

(EUR million)

Repertoire	Collections	Growth
Music	365	+11.2%
Audiovisual	72	-3.3%
Dramatic	25	-8.3%
Literary	6.8	+9.0%
Visual Arts	3.1	+12.0%



## CANADA/USA

+13.0%

EUR2,458m



### Collections rose 13% in 2019 but face declines in 2020

Rights collections in the Canada-USA region, the second largest in the world with 23.2% of global collections, reached a record EUR2.45 bn, up 13.0% year-over-year. Music accounts for 99.7% of total collections in the region. Collections grew by 39.7% over the past five years, driven mainly by digital music, but will fall sharply in 2020 due to COVID-19.

In 2019, all sources of revenues posted growth, especially digital income due to exploding digital streaming consumption, and societies' new licensing agreements with platforms such as Facebook.

Digital revenues were up 29.2% year-on-year in the region to EUR583m, and tripled in the past five years. Digital now accounts for 23.7% of the region's total collections.

Visual arts accounted for 0.4% of total collections and have experienced a 4.7% growth in the past five years, at EUR7.2m in 2019. The majority of the revenues come from the reproduction right, as the artist resale right for visual artists does not exist yet in North America.

Audiovisual collections through the collective management system are virtually non-existent as the various guilds representing audiovisual creators (Writers Guild of America and Directors Guild of America) collect residuals directly from the Hollywood film studios.

The growth in collections happened in a changing landscape due to the implementation of the Music Modernization Act, which will create a new collective, the MLC, to administer mechanical rights as of January 1, 2021. In addition, the US Department of Justice has started a review process of the consent decrees ruling US societies ASCAP and BMI.

Last, the trade agreement between USA, Canada and Mexico (USCMA) has come into force resulting in Canada adding 20 years to its term of copyright protection, now covered from the duration of the author's life plus 70 years.

### Breakdown of regional collections (EUR million)

Repertoire	Collections	Growth
Music	2,451	+13.0%
Visual Arts	7.2	+3.2%
Audiovisual	0.03	+3.0%

# ASIA-PACIFIC

**+9.6%**  
**EUR1,569m**



## Digital becomes the largest creators' income source

Collections in Asia-Pacific increased by 9.6% in 2019. Digital became the region's largest revenue stream for the first time, making up 30.2% of creators' income. The three largest digital collectors, Japan, Australasia and South Korea grew 17.6%, 24.1% and 28.0% respectively. The trend extended to smaller markets too. The Philippines saw digital rise to become the largest income source for the first time.

Sharply rising take-up of audio and video subscriptions services helped drive growth. New licensing agreements with DSPs include Netflix, YouTube and the video sharing platform Niconico in Japan, as well as Tencent in China. Similar agreements helped deliver a six-fold digital increase in India, a market assisted by music society IPRS' readmission to CISAC in 2018.

Collections from TV and radio saw moderate 2.9% growth, with declines in Australasia and Korea more than offset by strong performance in Japan, especially from its public broadcaster NHK's subscription service. India saw strong growth in broadcast income due to the finalisation of broadcaster negotiations. A major back payment saw broadcast income in China rise 53.0%.

Live and Background collections grew by 7.4% or EUR23m. but will show collapsing revenues across the region in 2020. Japan contributed more than half of the region's total with an increase in large concerts in 2019.

### Breakdown of regional collections (EUR million)

Repertoire	Collections	Growth
Music	1,471	+10.6%
Literary	92	-3.6%
Visual Arts	4.9	-4.6%
Dramatic	0.2	-39.8%
Audiovisual	0.04	+179%

# LATIN AMERICA AND THE CARIBBEAN

**-5.8%\***  
**EUR495m**



## Digital accounts for more than half of Mexico collections

Collections in Latin America and the Caribbean reached EUR495m in 2019. This was down 5.8% in 2018, but without currency impacts in Argentina, the region would have seen growth of 0.8%. Brazil and Mexico are the most influential markets for creators' collections, the first driven strongly by audiovisual streaming and broadcast, the second by rapid digital music growth. Brazil faces exceptional losses in 2020 due to COVID-19, partly due to its high dependence on TV broadcast.

Mexico has continued its rapid transition to digital over several years, making the country one of world's most developed digital markets. Digital income grew 22.9% and now makes up more than half of the country's total revenue. There is a strong campaign for legislative changes to help generate further revenues from private copying levies in Mexico. Currently, creators earn no income from private copying.

Brazil is the region's largest market, with collections accounting for more than one third (37.5%) of all collections. TV and radio made up more than half of Brazil's total collections. In the audiovisual sector, Argentina leads in collections for screenwriters and directors. There is growing support from governments in supporting collections to audiovisual creators in the region. Colombia saw the first collections in 2019. Brazil's societies DBCA and GEDAR were licensed to collect royalties for screenwriters and directors for the first time.

*\*Growth in EUR is highly impacted by local currency fluctuations, especially in Argentina*

## Breakdown of regional collections (EUR million)

Repertoire	Collections	Growth
Music	448	-2.8%
Audiovisual	37	-26.1%
Dramatic	9.9	-29.6%
Visual Arts	0.4	-2.3%

# AFRICA

**+1.1%**  
**EUR79m**



## Growth in 2019. Collections will collapse in 2020

Societies and creators in Africa are seeing some of the most dramatic losses in royalty collections resulting from COVID-19 in 2020. This follows a year of modest growth in 2019, with collections by CISAC's 37 Africa member societies rising 1.1% to reach EUR79.3m. TV and radio remained the largest area of income at 36.4% of total, but royalty income growth is limited by powerful broadcasters resisting copyright payments.

Live and background revenue made up 22.4% and grew by 2.8% in 2019. As in other regions, this sector will see royalties collapse in 2020 due to the cancellation of events and the closure of venues.

The fastest growing sector is digital, increasing by EUR1.2m to contribute 15.6% of the total. More than 80.0% of this was collected in South Africa and Algeria. Private copying income grew by 9.8% in 2019. Legislation and enforcement will dictate future revenue growth. This was illustrated in Malawi where income grew five-fold to EUR1.0m in 2019 following adoption of a new law in 2018. Eight African markets currently report private copying collections. Prospects for extension are encouraging: UEMOA, the West African Economic and Monetary Union proposed in 2020 a Directive to implement levies across the Union's eight member countries. If adopted by the UEMOA Council of Ministers, the Directive will be transposed into the national legislations of member states.

South Africa accounts for nearly half of the region's royalty collections. TV and radio accounted for 57.6% with live and background use at 21.7%. Digital increased by 37.7% to make up 10.2% of South Africa's total. Algeria accounts for around one fifth of the regional earnings with Morocco and Côte d'Ivoire accounting for 8.0% and 5.6% share respectively.

### Breakdown of regional collections (EUR million)

Repertoire	Collections	Growth
Music	73	+1.1%
Literary	4.1	+4.8%
Audiovisual	1.2	-3.7%
Dramatic	1.3	-4.5%
Visual Arts	0.02	-38.8%

## TABLES OF COLLECTIONS

## ALL REPERTOIRES



## COLLECTIONS FOR ALL REPERTOIRES IN EUR MILLION

RANK	COUNTRY/TERRITORY	COLLECTIONS	GROWTH	GLOBAL SHARE
1	UNITED STATES	2,201	+13.6%	21.8%
2	FRANCE	1,356	+3.2%	13.4%
3	JAPAN	885	+7.9%	8.8%
4	GERMANY	868	+7.7%	8.6%
5	UNITED KINGDOM	821	+11.0%	8.1%
6	ITALY	605	+3.8%	6.0%
7	AUSTRALASIA	345	+6.1%	3.4%
8	CANADA	257	+8.1%	2.5%
9	NETHERLANDS	233	-1.1%	2.3%
10	SWITZERLAND	223	+22.1%	2.2%
11	BRAZIL	185	-4.5%	1.8%
12	SOUTH KOREA	165	+6.5%	1.6%
13	SWEDEN	148	+8.6%	1.5%
14	DENMARK	147	+3.2%	1.5%
15	BELGIUM	141	+7.4%	1.4%
16	AUSTRIA	121	-4.0%	1.2%
17	POLAND	117	+3.5%	1.2%
18	FINLAND	110	+12.0%	1.1%
19	ARGENTINA	108	-24.2%	1.1%
20	RUSSIAN FEDERATION	101	+2.0%	1.0%
21	MEXICO	86	+10.5%	0.9%
22	NORWAY	71	+9.0%	0.7%
23	PORTUGAL	54	+9.6%	0.5%
24	CZECH REPUBLIC	50	+12.5%	0.5%
25	ISRAEL	50	+16.0%	0.5%
26	CHINA	48	+26.2%	0.5%
27	HUNGARY	47	+10.7%	0.5%
28	HONG KONG	38	+42.1%	0.4%
29	SOUTH AFRICA	38	-1.3%	0.4%
30	COLOMBIA	31	+0.8%	0.3%
31	ROMANIA	30	-9.1%	0.3%
32	SPAIN	30	+52.2%	0.3%
33	IRELAND	30	-1.7%	0.3%
34	CHILE	30	-0.8%	0.3%
35	PERU	20	+13.8%	0.2%
36	TURKEY	20	+47.1%	0.2%
37	INDIA	20	+251%	0.2%
38	CROATIA	19	+1.8%	0.2%
39	SERBIA	17	+71.1%	0.2%
40	SLOVENIA	17	-4.5%	0.2%
41	SINGAPORE	17	+15.3%	0.2%
42	TAIWAN, CHINESE TAIPEI	16	-7.4%	0.2%
43	ALGERIA	16	+0.0%	0.2%
44	SLOVAKIA	15	+19.3%	0.1%
45	MALAYSIA	11	+8.4%	0.1%
46	URUGUAY	9.6	-9.7%	0.1%
47	LITHUANIA	7.7	+9.6%	0.1%
48	LATVIA	6.8	+5.3%	0.1%
49	ESTONIA	6.8	+18.4%	0.1%
50	GREECE	6.5	+13.2%	0.1%

## MUSIC

## COLLECTIONS IN EUR MILLION

RANK	COUNTRY/TERRITORY	COLLECTIONS	GROWTH	GLOBAL SHARE
1	UNITED STATES	2,194	+13.6%	24.5%
2	FRANCE	1,036	+3.0%	11.6%
3	JAPAN	884	+7.9%	9.9%
4	GERMANY	816	+7.6%	9.1%
5	UNITED KINGDOM	753	+12.3%	8.4%
6	ITALY	476	+5.7%	5.3%
7	CANADA	257	+8.1%	2.9%
8	AUSTRALASIA	256	+9.9%	2.9%
9	NETHERLANDS	200	+4.4%	2.2%
10	BRAZIL	185	-4.5%	2.1%
11	SOUTH KOREA	158	+6.5%	1.8%
12	DENMARK	139	+3.4%	1.5%
13	SWEDEN	138	+9.0%	1.5%
14	SWITZERLAND	128	+6.2%	1.4%
15	BELGIUM	114	+5.5%	1.3%
16	AUSTRIA	91	+0.9%	1.0%
17	POLAND	88	+5.4%	1.0%
18	MEXICO	80	+11.3%	0.9%
19	NORWAY	70	+9.0%	0.8%
20	ARGENTINA	70	-19.6%	0.8%
21	FINLAND	67	+4.8%	0.7%
22	RUSSIAN FEDERATION	61	+4.6%	0.7%
23	CHINA	48	+28.2%	0.5%
24	PORTUGAL	47	+10.4%	0.5%
25	HUNGARY	43	+10.5%	0.5%
26	CZECH REPUBLIC	40	+12.6%	0.4%
27	ISRAEL	40	+11.8%	0.4%
28	HONG KONG	38	+42.1%	0.4%
29	SOUTH AFRICA	35	-2.1%	0.4%
30	COLOMBIA	30	-1.2%	0.3%
31	IRELAND	30	-1.7%	0.3%
32	CHILE	29	-0.9%	0.3%
33	ROMANIA	24	+6.0%	0.3%
34	PERU	20	+14.0%	0.2%
35	TURKEY	20	+47.1%	0.2%
36	INDIA	20	+251%	0.2%
37	CROATIA	18	+2.5%	0.2%
38	SERBIA	17	+72.5%	0.2%
39	SINGAPORE	17	+15.3%	0.2%
40	TAIWAN, CHINESE TAIPEI	16	-7.4%	0.2%
41	ALGERIA	14	+0.0%	0.2%
42	SLOVENIA	12	+0.8%	0.1%
43	MALAYSIA	11	+8.4%	0.1%
44	SLOVAKIA	10	+18.8%	0.1%
45	URUGUAY	8	-7.5%	0.1%
46	MOROCCO	6	-0.7%	0.1%
47	LITHUANIA	6	+9.5%	0.1%
48	ESTONIA	6	+19.7%	0.1%
49	THAILAND	6	+82.2%	0.1%
50	LATVIA	5	+2.8%	0.1%

# AUDIOVISUAL

## COLLECTIONS IN EUR MILLION

RANK	COUNTRY/TERRITORY	COLLECTIONS	GROWTH	GLOBAL SHARE
1	FRANCE	228	+2.8%	38.2%
2	SWITZERLAND	67	+81.6%	11.2%
3	ITALY	52	-4.7%	8.7%
4	ARGENTINA	30	-31.5%	5.0%
5	POLAND	24	-2.3%	4.0%
6	SPAIN	24	+63.1%	4.0%
7	RUSSIAN FEDERATION	22	+6.5%	3.7%
8	GERMANY	19	+44.3%	3.2%
9	FINLAND	19	+118%	3.1%
10	NETHERLANDS	17	-9.4%	2.9%
11	AUSTRIA	15	-30.0%	2.6%
12	UNITED KINGDOM	14	-13.8%	2.4%
13	BELGIUM	14	-1.7%	2.4%
14	ISRAEL	9.5	+34.0%	1.6%
15	ROMANIA	6.2	-41.2%	1.0%
16	MEXICO	5.9	+1.9%	1.0%
17	CZECH REPUBLIC	5.8	+13.4%	1.0%
18	SLOVENIA	4.7	-16.1%	0.8%
19	GREECE	4.4	+21.0%	0.7%
20	SLOVAKIA	3.2	+32.6%	0.5%

# DRAMA

## COLLECTIONS IN EUR MILLION

RANK	COUNTRY/TERRITORY	COLLECTIONS	GROWTH	GLOBAL SHARE
1	ITALY	62	-1.7%	35.2%
2	FRANCE	59	+8.0%	33.6%
3	RUSSIAN FEDERATION	18	-11.0%	10.1%
4	SWITZERLAND	10	+12.7%	5.9%
5	ARGENTINA	8.2	-31.4%	4.7%
6	BELGIUM	5.6	+52.5%	3.2%
7	POLAND	5.1	+0.2%	2.9%
8	PORTUGAL	1.6	+21.2%	0.9%
9	URUGUAY	1.0	-27.9%	0.6%
10	ALGERIA	0.8	+0.0%	0.4%
11	LUXEMBOURG	0.6	+3.1%	0.3%
12	LITHUANIA	0.6	-5.8%	0.3%
13	BELARUS	0.5	+11.9%	0.3%
14	CHILE	0.4	+12.5%	0.2%
15	GREECE	0.4	+0.0%	0.2%
16	LATVIA	0.3	-6.3%	0.2%
17	SLOVAKIA	0.3	-19.8%	0.1%
18	BRAZIL	0.2	-17.1%	0.1%
19	JAPAN	0.2	-39.8%	0.1%
20	SOUTH AFRICA	0.2	+28.4%	0.1%

# VISUAL ARTS

## COLLECTIONS IN EUR MILLION

RANK	COUNTRY/TERRITORY	COLLECTIONS	GROWTH	GLOBAL SHARE
1	FRANCE	33	+9.9%	20.2%
2	GERMANY	33	-3.9%	19.7%
3	UNITED KINGDOM	24	-1.4%	14.8%
4	SWEDEN	9.7	+4.2%	5.9%
5	ITALY	9.7	+1.5%	5.8%
6	NETHERLANDS	8.3	-44.0%	5.0%
7	DENMARK	8.0	+0.2%	4.8%
8	UNITED STATES	6.9	+4.4%	4.1%
9	SPAIN	5.9	+20.0%	3.6%
10	BELGIUM	5.7	+48.6%	3.5%
11	FINLAND	5.1	-18.3%	3.1%
12	AUSTRIA	3.7	-10.5%	2.2%
13	SOUTH KOREA	2.7	+4.8%	1.6%
14	AUSTRALIA	1.4	+31.7%	0.8%
15	CZECH REPUBLIC	1.3	+16.7%	0.8%
16	NORWAY	1.3	+12.2%	0.8%
17	SWITZERLAND	1.1	+16.1%	0.7%
18	JAPAN	0.8	-10.6%	0.5%
19	PORTUGAL	0.8	-39.9%	0.5%
20	HUNGARY	0.6	-0.8%	0.4%

# LITERATURE

## COLLECTIONS IN EUR MILLION

RANK	COUNTRY/TERRITORY	COLLECTIONS	GROWTH	GLOBAL SHARE
1	AUSTRALIA	88	-4.0%	44.7%
2	UNITED KINGDOM	29	+4.4%	14.9%
3	FINLAND	19	-1.1%	9.8%
4	SWITZERLAND	16	+10.1%	8.2%
5	AUSTRIA	10	+12.8%	5.3%
6	NETHERLANDS	8.0	-25.3%	4.0%
7	ITALY	6.5	-1.1%	3.3%
8	SOUTH KOREA	3.9	+8.2%	2.0%
9	SOUTH AFRICA	3.3	+5.9%	1.7%
10	CZECH REPUBLIC	2.7	+8.0%	1.4%
11	PORTUGAL	2.3	+10.8%	1.2%
12	HUNGARY	1.5	+10.8%	0.8%
13	BELGIUM	1.5	+20.9%	0.8%
14	SLOVAKIA	1.0	+4.4%	0.5%
15	LATVIA	0.6	+28.0%	0.3%
16	ISRAEL	0.6	+88.4%	0.3%
17	SLOVENIA	0.6	-0.6%	0.3%
18	ALGERIA	0.6	+0.0%	0.3%
19	LITHUANIA	0.3	+14.4%	0.2%
20	CÔTE D'IVOIRE	0.1	+72413%	0.1%



# TABLES OF COLLECTIONS

## COLLECTIONS PER CAPITA BY COUNTRY/TERRITORY (EUR)

**WORLD AVERAGE: 1.58**

RANK	COUNTRY/TERRITORY	COLLECTIONS PER CAPITA	REGION
1	SWITZERLAND	26.02	EUROPE
2	DENMARK	25.23	EUROPE
3	FRANCE	20.19	EUROPE
4	FINLAND	19.86	EUROPE
5	SWEDEN	14.34	EUROPE
6	AUSTRIA	13.64	EUROPE
7	AUSTRALASIA	13.61	ASIA-PACIFIC
8	NETHERLANDS	13.45	EUROPE
9	NORWAY	13.35	EUROPE
10	ICELAND	12.90	EUROPE
11	UNITED KINGDOM	12.29	EUROPE
12	BELGIUM	12.24	EUROPE
13	GERMANY	10.44	EUROPE
14	ITALY	10.04	EUROPE
15	LUXEMBOURG	9.31	EUROPE
16	SLOVENIA	8.08	EUROPE
17	NEW CALEDONIA (FRANCE)	7.81	ASIA-PACIFIC
18	JAPAN	7.01	ASIA-PACIFIC
19	CANADA	6.84	CANADA/USA
20	UNITED STATES	6.71	CANADA/USA
21	IRELAND	5.98	EUROPE
22	ANDORRA	5.73	EUROPE
23	ISRAEL	5.52	EUROPE
24	PORTUGAL	5.21	EUROPE
25	ESTONIA	5.14	EUROPE
26	HONG KONG	5.12	ASIA-PACIFIC
27	HUNGARY	4.83	EUROPE
28	CROATIA	4.74	EUROPE
29	CZECH REPUBLIC	4.69	EUROPE
30	LATVIA	3.57	EUROPE
31	SOUTH KOREA	3.19	ASIA-PACIFIC
32	SAINT LUCIA	3.11	LATIN AMERICA AND THE CARIBBEAN
33	POLAND	3.07	EUROPE
34	SINGAPORE	2.95	ASIA-PACIFIC
35	LITHUANIA	2.77	EUROPE
36	URUGUAY	2.76	LATIN AMERICA AND THE CARIBBEAN
37	SLOVAKIA	2.69	EUROPE
38	MACAU	2.51	ASIA-PACIFIC
39	SERBIA	2.47	EUROPE
40	ARGENTINA	2.40	LATIN AMERICA AND THE CARIBBEAN
41	MONTENEGRO	2.37	EUROPE
42	BARBADOS	1.64	LATIN AMERICA AND THE CARIBBEAN
43	CHILE	1.56	LATIN AMERICA AND THE CARIBBEAN
44	ROMANIA	1.55	EUROPE
45	TRINIDAD AND TOBAGO	1.16	LATIN AMERICA AND THE CARIBBEAN
46	NORTH MACEDONIA	1.03	EUROPE
47	BOSNIA AND HERZEGOVINA	0.94	EUROPE
48	BRAZIL	0.88	LATIN AMERICA AND THE CARIBBEAN
49	RUSSIAN FEDERATION	0.70	EUROPE
50	TAIWAN, CHINESE TAIPEI	0.68	ASIA-PACIFIC

# TABLES OF COLLECTIONS

## COLLECTIONS AS % OF GDP BY COUNTRY/TERRITORY

**WORLD AVERAGE: 0.014%**

RANK	COUNTRY/TERRITORY	COLLECTIONS AS % OF GDP	REGION
1	FRANCE	0.056%	EUROPE
2	DENMARK	0.047%	EUROPE
3	FINLAND	0.046%	EUROPE
4	SERBIA	0.037%	EUROPE
5	CROATIA	0.036%	EUROPE
6	SWITZERLAND	0.036%	EUROPE
7	SLOVENIA	0.035%	EUROPE
8	ITALY	0.034%	EUROPE
9	HUNGARY	0.033%	EUROPE
10	UNITED KINGDOM	0.033%	EUROPE
11	SWEDEN	0.031%	EUROPE
12	AUSTRIA	0.030%	EUROPE
13	MONTENEGRO	0.030%	EUROPE
14	SAINT LUCIA	0.030%	LATIN AMERICA AND THE CARIBBEAN
15	BELGIUM	0.030%	EUROPE
16	NETHERLANDS	0.029%	EUROPE
17	AUSTRALASIA	0.028%	ASIA-PACIFIC
18	ARGENTINA	0.027%	LATIN AMERICA AND THE CARIBBEAN
19	GERMANY	0.025%	EUROPE
20	PORTUGAL	0.025%	EUROPE
21	ESTONIA	0.024%	EUROPE
22	CZECH REPUBLIC	0.023%	EUROPE
23	LATVIA	0.022%	EUROPE
24	POLAND	0.022%	EUROPE
25	ICELAND	0.022%	EUROPE
26	BURKINA FASO	0.021%	AFRICA
27	NORWAY	0.020%	EUROPE
28	JAPAN	0.020%	ASIA-PACIFIC
29	MALAWI	0.019%	AFRICA
30	URUGUAY	0.019%	LATIN AMERICA AND THE CARIBBEAN
31	NORTH MACEDONIA	0.019%	EUROPE
32	BOSNIA AND HERZEGOVINA	0.017%	EUROPE
33	CANADA	0.017%	CANADA/USA
34	LITHUANIA	0.016%	EUROPE
35	ANDORRA	0.016%	EUROPE
36	SLOVAKIA	0.016%	EUROPE
37	ISRAEL	0.014%	EUROPE
38	ROMANIA	0.013%	EUROPE
39	PARAGUAY	0.013%	LATIN AMERICA AND THE CARIBBEAN
40	SOUTH AFRICA	0.012%	AFRICA
41	HONG KONG	0.012%	ASIA-PACIFIC
42	CHILE	0.012%	LATIN AMERICA AND THE CARIBBEAN
43	UNITED STATES	0.012%	CANADA/USA
44	BRAZIL	0.011%	LATIN AMERICA AND THE CARIBBEAN
45	SOUTH KOREA	0.011%	ASIA-PACIFIC
46	COLOMBIA	0.011%	LATIN AMERICA AND THE CARIBBEAN
47	ALGERIA	0.011%	AFRICA
48	BARBADOS	0.010%	LATIN AMERICA AND THE CARIBBEAN
49	PERU	0.010%	LATIN AMERICA AND THE CARIBBEAN
50	DJIBOUTI	0.010%	AFRICA



# MEMBERSHIP BY REGION

120 countries/territories - 232 members

## EUROPE

46 countries - 105 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
ARMAUTOR NGO	M	D, M	ARMENIA
ARTISJUS	M	M, L	HUNGARY
ATHINA-SADA	P	AV	GREECE
AUPO CINEMA	P	AV	UKRAINE
AUTODIA	M	M	GREECE
AZDG	P	AV	AZERBAIJAN
BILDRECHT	M	AGP	AUSTRIA
BILDUPPHOVSRAATT	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
GESAC	A	NR	BELGIUM
GESTOR	M	AGP	CZECH REPUBLIC
HDS-ZAMP	M	M	CROATIA
HUNGART	M	AGP	HUNGARY
IMPF	A	M	BELGIUM
IMRO	M	M	IRELAND
IVARO	M	AGP	IRELAND
KAZAK	M	M, D, L	KAZAKHSTAN
KODA	M	M	DENMARK
KOPIOSTO	M	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	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-5	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
SACEM	M	M	FRANCE
SACEMLUXEMBOURG	M	M	LUXEMBOURG
SAIF	M	AGP	FRANCE

SOCIETY	STATUS	REPERTOIRE	COUNTRY/TERRITORY
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	HOLY SEE (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
ZAIS	M	M, D, L	POLAND
ZAMP MACEDONIA	M	M	NORTH MACEDONIA
ZAMP SLOVENIA	M	L	SLOVENIA
ZAPA	M	AV	POLAND
ZPAP	P	AGP	POLAND

## CANADA/USA

2 countries - 13 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
DGA	A	AV	UNITED STATES
DRCC	M	AV	CANADA
SARTEC	A	AV	CANADA
SESAC	M	M	UNITED STATES
SOCAN	M	M, AGP	CANADA
WGAW	A	AV, D	UNITED STATES

## STATUS WITHIN CISAC

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

## REPERTOIRE



**M** = Music



**L** = Literature



**AV** = Audiovisual



**D** = Drama



**AGP** = Visual Arts

**NR** = No Repertoire



# MEMBERSHIP BY REGION

120 countries/territories - 232 members

## ASIA-PACIFIC

17 countries/territories - 29 members

SOCIETY	STATUS	REPERTOIRE	COUNTRY/TERRITORY
AMCOS	A	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
FILSCAP	M	M	PHILIPPINES
ICSC	P	AGP	CHINA
IPRS	M	M	INDIA
JASPAR	P	AGP	JAPAN
JASRAC	M	M	JAPAN
KOMCA	M	M	SOUTH KOREA
KORRA	P	L, AGP	SOUTH KOREA
KOSA	M	L, AGP	SOUTH KOREA
MACA	M	M	MACAU
MACP	M	M	MALAYSIA
MCSC	M	M	CHINA
MCT	M	M	THAILAND
MOSCAP	P	M, AV	MONGOLIA
MRCSN	P	M	NEPAL
MÜST	M	M	TAIWAN, CHINESE TAIPEI
SACENC	M	M	NEW CALEDONIA (FRANCE)
SACK	M	AGP	SOUTH KOREA
SINGCAPS	P	M	SINGAPORE
VCPMC	M	M	VIETNAM
WAMI	M	M	INDONESIA

## AFRICA

32 countries - 37 members

SOCIETY	STATUS	REPERTOIRE	COUNTRY/TERRITORY
BBDA	M	M, AV, D, L, AGP	BURKINA FASO
BCDA	M	M	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
CNRCMSE	P	M, AV, D, L, AGP	ETHIOPIA
COSOMA	M	M, L	MALAWI
COSON	M	M	NIGERIA
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	M	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
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	M	M	MOZAMBIQUE
UNAC-SA	P	M	ANGOLA
UPRS	M	M	UGANDA
ZAMCOPS	M	M	ZAMBIA
ZIMURA	M	M	ZIMBABWE

## LATIN AMERICA & THE CARIBBEAN

24 countries - 48 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
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	P	AV	COLOMBIA
DBCA	P	AV	BRAZIL
DIRECTORES	M	AV	MEXICO
ECCO	M	M	SAINT LUCIA
GEDAR	P	AV	BRAZIL
JACAP	M	M	JAMAICA
REDES	P	AV	COLOMBIA
SACIM, EGC	M	M	EL SALVADOR
SACM	M	M	MEXICO
SACVEN	M	M, D	VENEZUELA
SADAIC	M	M	ARGENTINA
SAGCRYT	P	AV	MEXICO
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

### New CISAC members as of May 2020

SOCIETY	STATUS	REPERTOIRE	COUNTRY/TERRITORY	REGION
COSBOTS	P	M, AV, D, L	BOTSWANA	AFRICA
DGK	P	AV	SOUTH KOREA	ASIA-PACIFIC
DEGNZ	A	AV	NEW ZEALAND	ASIA-PACIFIC
SPACQ	A	M	CANADA	CANADA-USA

### Societies having changed membership status as of May 2020:

DASC and REDES are now Members, COSON, MCSN and SOMAS are now Provisional members.

### Societies no longer CISAC members as of May 2020:

CNRCMSE (ETHIOPIA, D, AGP, L, AV, M), SAGCRYT (MEXICO, AV), ZPAP (POLAND, AGP), KOSA (SOUTH KOREA, L, AGP)

### STATUS WITHIN CISAC

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### REPERTOIRE

**M** = Music   
 **AGP** = Visual Arts   
 **D** = Drama  
**AV** = Audiovisual   
 **L** = Literature   
 **NR** = No Repertoire

# 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 232 collective management organisation (CMO) members in 120 countries to generate this comprehensive global collection report.

This 2020 report features figures based on the gross domestic collections of CISAC members in their respective countries. To avoid double-counting, only final royalties collected for the use of creative works are compiled. International exchanges among CMOs, which are based on reciprocal agreements, are excluded.

Collections are presented globally, on a regional basis with focused data as well as split into the five CISAC repertoires that member societies represent: music, audiovisual, drama, literature and visual arts.

## TYPES OF RIGHTS

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

### Performing Rights

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

### Reproduction Rights

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

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

### Other Rights

In this report, references to "other rights" include all that do not fall under "performing rights" or "reproduction

rights". These include royalties collected from private copying levy schemes, rental or public lending, educational use, synchronisation, exhibition as well as collections from auction houses and galleries for visual artists' resale right.

## TYPES OF USE

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

### TV and Radio

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

### Live and Background

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

### **Digital and Multimedia**

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

### **Compact Discs (CDs)**

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

### **Video**

Collections from licensing musical works within audio-visual 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. Almost 40% of collections declared to CISAC come from the Eurozone while about 20% are expressed in US dollar and almost 10% in Yen. Almost two third 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 2019. Previous year figures are converted into Euro using the average rate of the corresponding year. Year-by-year comparisons are impacted by exchange rates variations, which may vary with political and economic situations. Changes at national level affect global or aggregated data. They have 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 2020 Global Collections Report, 2015 to 2019 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 changes in the number of CISAC members. When societies join CISAC and declare their income, this automatically increases revenues in their country/territory. Conversely, when societies stop being CISAC members, collections from their market are reduced compared to previous reports. The previous years' collections are therefore re-stated in order to show a like-for-like comparison.

# future**source**

CONSULTING

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