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2017 CISAC Global Collections Report: key highlights

Stats and trends

Global collections are up 6% to just under €9.2 billion (US$10.1 billion). For music, royalties are up 7% to €8.0 billion (US$8.9 billion). Global collections have risen for three years in a row and are up 19% from 2012.

Digital collections rose 51% - driven largely by streaming subscription services but digital is still held back by poor returns in particular from video streaming services, accounting for only 10.4% of global income and only one quarter of collections from TV and radio

The biggest collections market is the US with €1.76 billion (US$1.95 billion) – with digital income up 80% year on year, helped by increased streaming income.

Live and background income is up globally, reflecting the health of live music in particular. TV and radio income is still the biggest segment globally but slightly down, reflecting pressure on rates from broadcasters. In Europe, royalties from live and background music overtook TV and radio music royalties for the first time

A major driver of the numbers globally is Germany, the third largest market, helped by substantial back payments of private copying levies. Germany added more than €100 million in royalty collections, up 12.5%.

Digital champions, leveraging the explosion of streaming, include countries with digital shares more than three times the global average: Sweden (33%), Korea (34%) and Mexico (36%).

Geographically, Europe continued to lead the way in 2016 with 56.8% of collections. In Asia-Pacific and Australasia, collections increased 10.3% to €1,351 million. Collections in Latin America & the Caribbean rose by 1.3% to €557 million. In Africa, collections rose 9.5% to €67 million, representing only 0.7% of the global total.

Highlighting untapped revenue growth potential

In **China,** a huge potential market, current royalties collections stand at €23 million and only 105 (of more than 2,000) radio and TV broadcasters pay royalties. At full capacity authors could earn tens of millions of euros more.

In **Africa**, a survey of 22 CISAC member countries indicates no more than 42% (1 126 out of 2 680) of radio stations are licensed. Royalty collections in Africa at €67 million are still less than 1% of global collections.

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In **visual arts**, a crucial revenue source is the resale right, up by 25% in the last five years to €43 million. But artists in some of the world's most important markets – including the US, Japan, Switzerland and China - still do not have this right.

In **audiovisual** repertoire, a global sector of €578 million would be significantly bigger if countries followed the lead of some governments in Europe and Latin America in granting stronger rights to directors and screenwriters.

The Report's calls for Action

Governments should address the transfer of value

CISAC Director General Gadi Oron: "Streaming is helping creative industries, led by music, storm back to growth. Authors' revenues, however, are not sharing in the digital boom in the way they should. There is a critical need for legislative reforms – starting in Europe – to correct this unacceptable market imbalance".

Legislation granting fair rights for screenwriters and director

Filmmaker, screenwriter and CISAC Vice President Marcelo Pineyro: "Directors and writers are indispensable to the success of audiovisual works and of a country's film industry. Yet in most parts of the world, writers and directors do not get remunerated when their works are re-used by broadcasters or online services. We are campaigning for an inalienable and unwaivable audiovisual remuneration right for screenwriters and directors everywhere. This proposal is gaining momentum internationally".

A universal resale right to give fair treatment for visual artists

CISAC Vice President and renowned visual artist Miquel Barcelo: "It is not enough for governments to act by themselves. Artists today work in a global world, so international rules are needed. This is why it has been so important to see this initiative gain momentum all around the world".

Fairer licencing rates are needed, especially in developing markets. Creative works are driving billions of dollars or revenues for commercial operators that use them. However, in many markets, especially in Asia and Africa, tariff rates are far too low or non-existent due to the power of large broadcasters, telecoms and digital platforms. This is why collective management organisations play such a vital role on behalf of creators.