

Global Collections Report





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The cover of this year’s Global Collections Report visually captures the dynamic conversation that surrounds the value of creativity in the modern world. By juxtaposing Michelangelo’s David—a timeless symbol of human artistic achievement—with a bold, technology-infused glitch, we explore the tension and harmony between classical creativity and the digital age. This fusion reflects the evolving global landscape where art, innovation, and disruption intersect.

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Foreword - Björn Ulvaeus, CISAC President

We must keep humanity at the heart of creation

What's most worrying to the creative community is that AI can absorb creative material and re-present it without human authors' control or compensation. I approach this technological revolution as someone who has used AI tools myself. I recognise their potential. For me, AI tools can be like a sounding board, offering references and unexpected directions that expand and complement the human creative process. But I also recognise that when AI companies build vast models using unlicensed works of millions of creators, the effect is very different. What began as a simple tool becomes an instrument of systematic exploitation. Unchecked and uncontrolled, AI raises deep questions about authorship and value.

The figures are stark. A study commissioned by CISAC, and similar studies prepared by CISAC members in different countries, projected that around a quarter of creators' royalties could be lost if AI use remains unlicensed and under-regulated. At the same time, the market for AI-generated content is expected to rise significantly, and reach 64 billion in just three years. This is value flowing away from the individuals who give culture its meaning.

In many of my recent public interventions, in Brussels, in the UK and elsewhere, I have urged that creators must be at the decision table, not on the outside looking in. I've also highlighted that if creators are sidelined, technology companies could capture value that rightly belongs to human expression. I've met policymakers who listened, but what we truly need now are political champions to ensure that respect for human authorship is not pushed aside in the race for innovation.

Nevertheless, there is reason for guarded hope. In Sweden, our member society STIM recently issued a pioneering AI licence that demonstrates that creators' rights and technological progress can coexist, if licensing and transparency are made central. Above all this is testament to the fact that AI companies can act responsibly, can respect human creation, and can work together with us on solutions that work for both sides.

As President of CISAC, I will continue to speak out so that the creator's voice is heard. The future of culture depends on keeping human imagination, not machines, at the heart of creation.

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What we truly need now are political champions to ensure that respect for human authorship is not pushed aside in the race for innovation.

In 2024, authors' societies delivered record royalties to creators worldwide. This achievement is a cause for celebration, reflecting the resilience of collective management and the value of creative works in a growing market. At the same time, the advent of artificial intelligence signals a profound shift for our sector — proof that progress and disruption can exist side by side, and that the future of creativity will be shaped by how we reconcile both realities.

Foreword - Dean Ormston, CISAC Chair of the Board

Collective rights management is critical in the face of unprecedented global challenges

In this era of rapid AI advancement and global digitalisation, creators face unprecedented challenges, not just in how they work, but in ensuring they're properly compensated for work that enriches our world immeasurably. The role of collective management societies and our global coalition of rightsholders have never been more critical.

Unified collective management is what ensures a song, film, book or artwork can generate income anywhere in the world. It's what ensures that creators are part of the success story in any technological advancement. It's what protects creators' rights against digital disruption, shifting consumption patterns and the existential challenge posed by AI.

Our member societies remain a steadfast, trusted partner for creators globally, evolving, innovating, negotiating and adapting to protect rights and amplify voices across borders. They provide professional licensing, distribution and rights data systems that are proven and scalable, with new innovations that emerge constantly. CIS-NET 2, for instance, will ensure creators are paid faster and more efficiently than ever before.

As I embark on my first term as CISAC Chair, my focus remains clear: championing the protection of creators as the cultural, social and economic foundation of every nation. Each country has a responsibility to nurture its cultural voices through robust copyright frameworks, and to protect creators' share in the value generated by innovations like Generative AI.

Our solidarity across societies will be decisive in ensuring creators continue to be recognised and remunerated for their essential work. This is a battle we're committed to—for the long haul.

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Unified collective management is what ensures that creators are part of the success story in any technological advancement.

Foreword - Gadi Oron, CISAC Director General

Creators' royalties hit record high, but AI threatens the future of creative value



© Gilles Daquin



Creators deserve clarity, protection, and above all, a fair share of the value their work generates.

Artificial intelligence is not simply another means of distributing creative works; it is a technology that can appropriate and replicate them. It advances at a speed far greater than current regulation, and without proper safeguards or data transparency, it risks undermining the very foundation of creative value.

CISAC was very engaged in the consultations surrounding the EU AI Act. When it was first adopted about a year ago, we, alongside many others, welcomed it as an important step in establishing responsibility and trust in the digital age. Yet, this summer, the European Commission's implementation package fell extremely short of this ambition. Together with a broad coalition of rightsholders, CISAC warned that the measures tilt the balance in favour of AI companies while leaving creators unprotected. This was not just a missed opportunity, it was a betrayal, and it underscores the urgency of ensuring that the rights of authors are upheld in practice, not just in principle.

Meanwhile, CISAC and its members continue to fulfil their mission. In 2024, royalties were collected and distributed to more than five million creators worldwide. We welcomed new members, strengthened global standards and continued to work diligently towards a groundbreaking new system for rights data exchanges throughout our society network: CIS-NET 2. This system, which is set to launch in 2027, will greatly enhance the efficiency of collective management across borders.

When CISAC was first established, its purpose was to unite authors' societies globally in defending the fundamental right of creators to earn a living from their work. In the analogue age, that meant establishing systems of representation, remuneration and respect for artistic expression. Now, in the face of a revolution defined by artificial intelligence, automation and algorithmic exploitation, our founding mission is more urgent than ever.

As we prepare to mark CISAC's centenary in 2026, we must ensure that we step into the next century with renewed strength and resolve. Creators deserve clarity, protection and above all, a fair share of the value their work generates. We call on governments, platforms and all actors in the digital value chain to meet this responsibility.

This year's Global Collections Report records another milestone: royalties for creators reached EUR13.97bn in 2024, with digital income surpassing EUR5bn for the first time. Looking with a longer lens, over the past decade, collections have grown by two-thirds, showing the adaptability of authors' societies across CISAC's global network even as consumer habits, market trends, government policies and technology evolve rapidly.

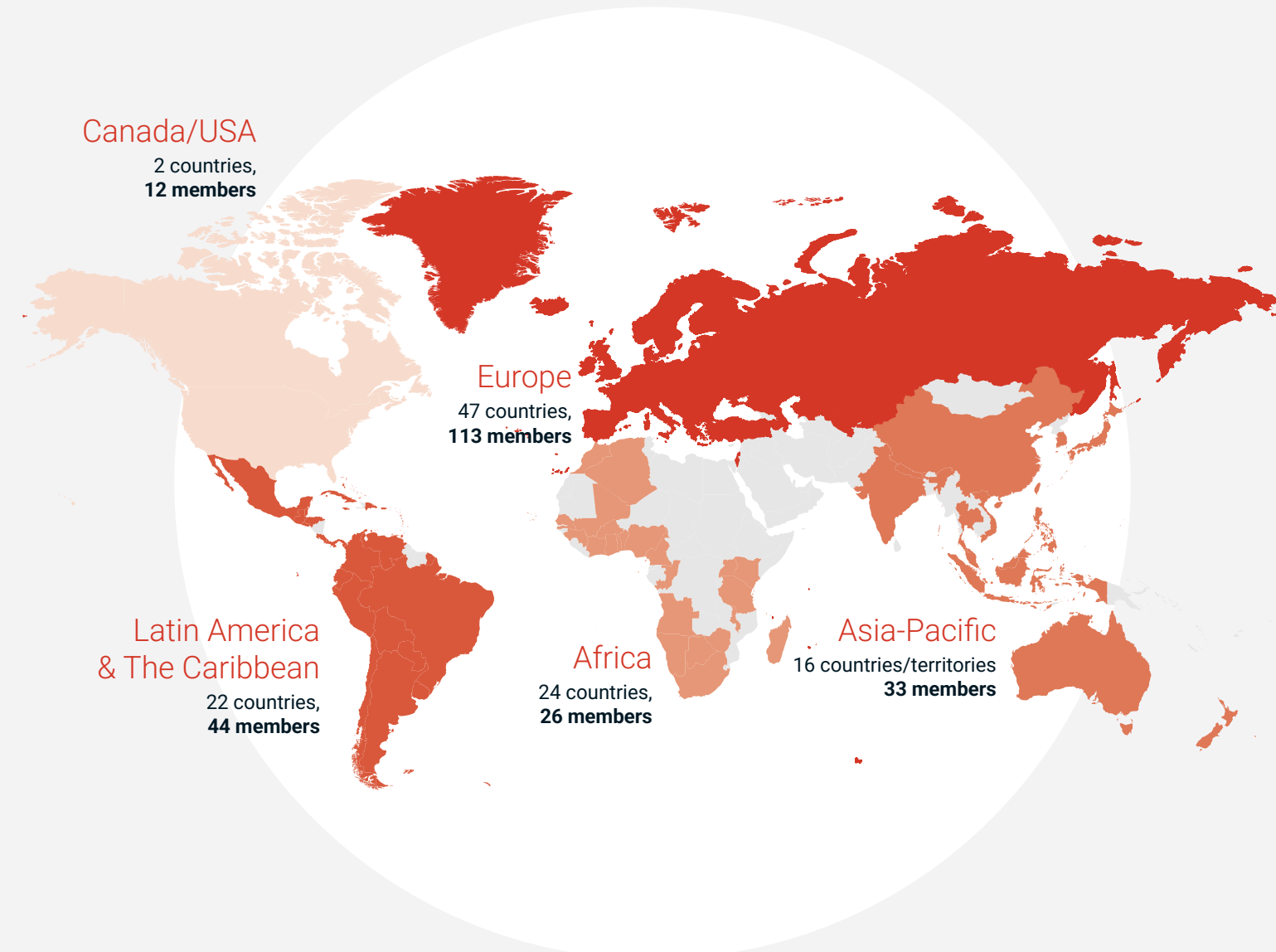
Yet, alongside this success, new challenges are emerging that will define the future of the creative sector.

About CISAC

The International Confederation of Societies of Authors and Composers (CISAC) represents a global network of 228 collective management organisations located in 111 countries and territories.

These societies represent more than five million creators across five repertoires: music, audiovisual, visual arts, literature, and drama.

Working together to protect creators' rights and strengthen copyright worldwide, CISAC sets professional and technical standards, advocates for fair legislation, and supports its membership in delivering transparent, efficient rights management in a rapidly evolving creative economy.



On artificial intelligence

The global debate

Artificial Intelligence is dominating headlines worldwide, hailed as both a technological marvel and a societal disruptor. In cultural industries, Generative AI (GenAI) promises powerful new ways to create and distribute work. Yet, like all disruptive technologies, its rapid, unregulated growth poses profound risks. The debate now centres on whether AI remains a tool that enhances human creativity or constitutes an existential threat to it.

How GenAI works and why it's a problem

GenAI systems function by ingesting vast amounts of creative works to “train” their models. These works are tokenised and fed into the machine’s decision-making process, often without permission and payment. This creates a twofold challenge:

- **On the input side:** the use of copyrighted works is typically unauthorised and unremunerated, undermining both creators’ moral and economic rights to earn a livelihood.
- **On the output side:** AI-generated content floods the market, competing directly with human-made works and eroding revenue across the creative industries.

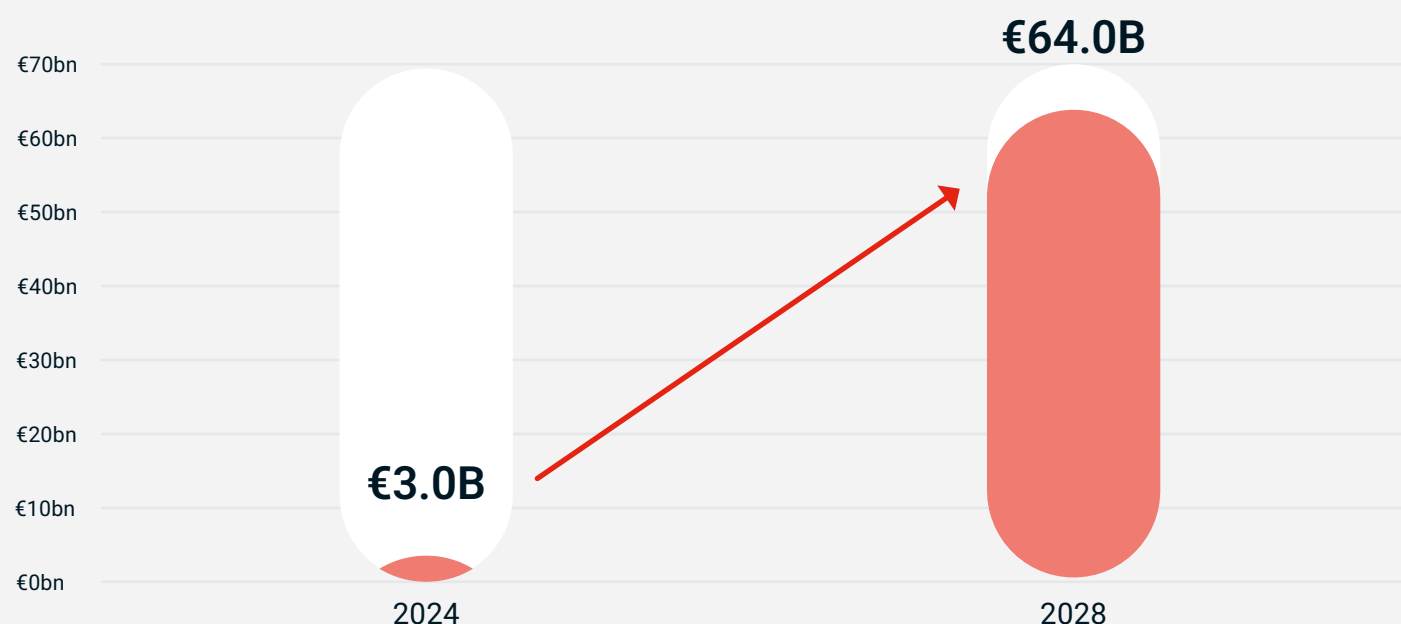
The Economic Impact: CISAC's 2024 Global Study

In December 2024, CISAC published the first global *Study on the Economic Impact of Generative AI in the Music and Audiovisual Sectors*, prepared with PMP Strategy. Drawing on more than 50 stakeholder interviews, extensive data analysis and industry benchmarking, the study delivered stark forecasts:

- **Music sector:** By 2028, GenAI-generated outputs are expected to reach EUR40 bn, slashing creator revenues by 24%. That means a EUR4bn loss in 2028 alone, with GenAI projected to represent one-fifth of streaming income and 60% of music library revenues.
- **Audiovisual sector:** GenAI revenues could soar to EUR48bn annually by 2028, driving a 21% loss for creators, equivalent to EUR4.5bn in that year alone. Translators and adaptors for dubbing and subtitling will experience the strongest impact, with 56% of their revenue at risk, while screenwriters and directors could see their revenues cannibalised by 15 to 20%.

The study projected the combined GenAI market in these sectors would grow from EUR3bn in 2024 to EUR64bn in 2028, an unprecedented transfer of value from creators to technology companies.

GenAI market in creative sectors projected to soar from €3bn in 2024 to €64bn by 2028



Policy and Lobbying

CISAC has long been at the forefront of lobbying for a fair and sustainable legislative environment. In 2023, it issued an open letter outlining seven principles for policymakers, including:

- Full recognition and protection of creators’ rights.
- Licensing mechanisms to ensure remuneration.
- Avoiding exceptions for text and data mining, particularly those that strip away creators’ ability to opt out.
- Transparency from AI operators about which copyrighted works are ingested.
- Giving credit to the original creators whose works are used.
- Legal accountability for AI operators for their use of copyrighted materials and outputs.
- A clear affirmation that AI should enhance—not replace—human creativity, embedded into international legal frameworks.

These demands shaped the debate around the EU AI Act, adopted in March 2024 after intense lobbying from CISAC and over 200 cultural organisations. While the Act introduced important standards on copyright and transparency, its subsequent attempt to implement a meaningful Code of Practice has been widely seen as a betrayal, since it fell short on transparency, licensing and accountability.

Hope Amid Disruption

Amid these tech shifts, there is also hope. CISAC member societies are ready to offer licences that will allow AI companies to train their systems lawfully while ensuring creators are compensated.

Collective licensing offers a path forward, providing transparency, fairness and trust in this digital era; an era where innovative tools can support and enhance, rather than undermine, the creative process.

The Road Ahead

The projected economic and cultural losses from unregulated GenAI use are immense. Beyond the financial toll, underrepresented voices and smaller creators risk being left further behind.

CISAC is now intensifying its lobbying efforts at the global level, through WIPO, UNESCO and national governments, to secure a future where human creativity is protected, valued and rewarded.



On fraud

Fraud in musical works and registrations is one of the most serious threats facing creators today.

Bad actors exploit weaknesses in registration systems to claim royalties for works they did not create, or to invent fake titles that divert income away from legitimate songwriters and composers. Left unchecked, this activity harms creators financially and undermines trust in the global royalty distribution system.

Fraudulent registrations can take many forms. Individuals may claim ownership of existing works or register fictitious titles in order to siphon royalties. With the rise of AI-generated content and the vast volume of registrations flowing into societies, the risk of fraudulent claims slipping through the cracks has grown.

In response, CISAC has prepared a network-wide *Know Your Customer* and *Know Your Repertoire* framework.

The initiative provides member societies with clear guidelines for verifying repertoire registrations, validating both interested parties and works, sharing intelligence across societies, and taking specific steps when anomalies are identified.

The strength of this framework lies in CISAC's global reach. With 228 member societies in 111 countries, representing more than 5 million creators, we enable the exchange of knowledge, alerts and best practices across borders. By setting common standards and coordinating intelligence, the framework strengthens the ability of societies to protect royalties and ensure they reach the rightful creators.

Fraud targeting musical works and registrations is complex, but it can be tackled with collective action, transparency and global resolve. CISAC and its member societies are leading that effort, ensuring that the value of music stays where it belongs, in the hands of creators.



By setting common standards and coordinating intelligence, the framework strengthens the ability of societies to protect royalties and ensure they reach the rightful creators.



Highlights at a glance

Digital growth powers EUR13.97bn global royalties for creators

Over the past decade, global collections have grown by two-thirds. In 2024, royalties earned by creators around the world rose by +6.6%, reaching a record EUR13.97bn. A +11.2% rise in digital revenues was the primary driver, as subscriber numbers and new contract negotiations continued to expand. The live & background sector also saw a healthy increase, narrowing the gap with TV & radio, which returned to modest growth during the year.



In 2024, royalties earned by creators around the world rose by +6.6%, reaching a record

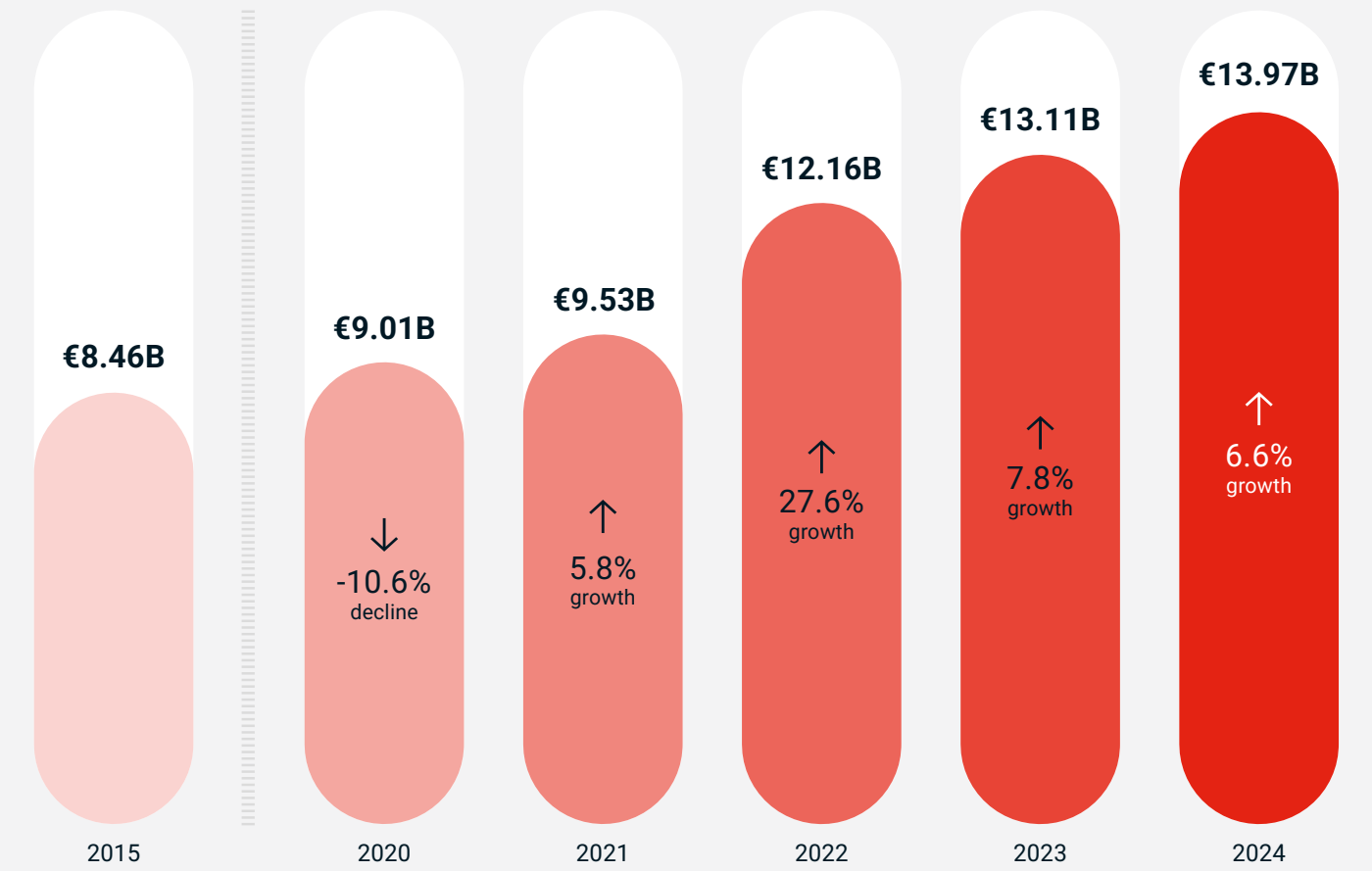
€13.97B



+11.2%

increase in digital revenues, driving most of the global growth.

Global collections (EUR billion) and annual growth 2015–2024

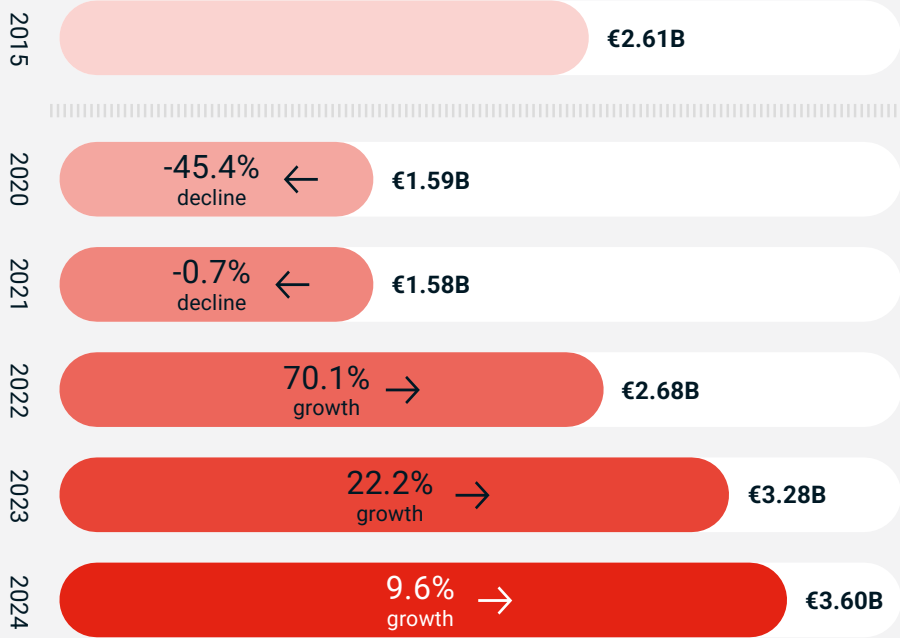


Live & background royalties surpass EUR3.5bn in third year of growth

Live & background revenues rose by +9.6% in 2024 to exceed EUR3.5bn for the first time. This income is generated through the use of creators’ works at live events, concerts and exhibitions, as well as licensing fees from hotels, restaurants and retail outlets that play music at their businesses.

The total was more than one-third above 2015 levels and nearly one-quarter higher than the pre-pandemic peak. The strongest growth came from Canada/USA and Africa, which rose by +15.7% and +13.8% respectively, while Latin America was the only region to post a slight decline.

Live & background collections (EUR billion) and annual growth 2015–2024

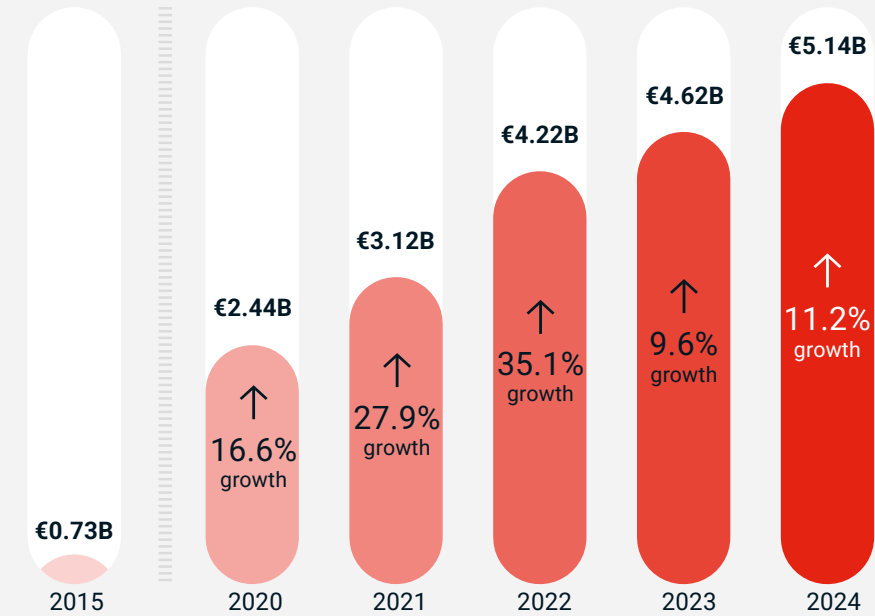


Streaming surges: Global digital collections top EUR5bn

Digital revenues from audio streaming and video-on-demand subscriptions grew by +11.2% in 2024, surpassing the EUR5bn mark for the first time and capping a seven-fold increase since 2015. As in previous years, the fastest growth came from smaller markets, where new licensing deals continued to expand digital income.

Despite this shift, the USA, France and the UK remained the top three collecting markets, together accounting for more than half of global digital revenues. Growth in these countries alone added over EUR300m to the 2024 total.

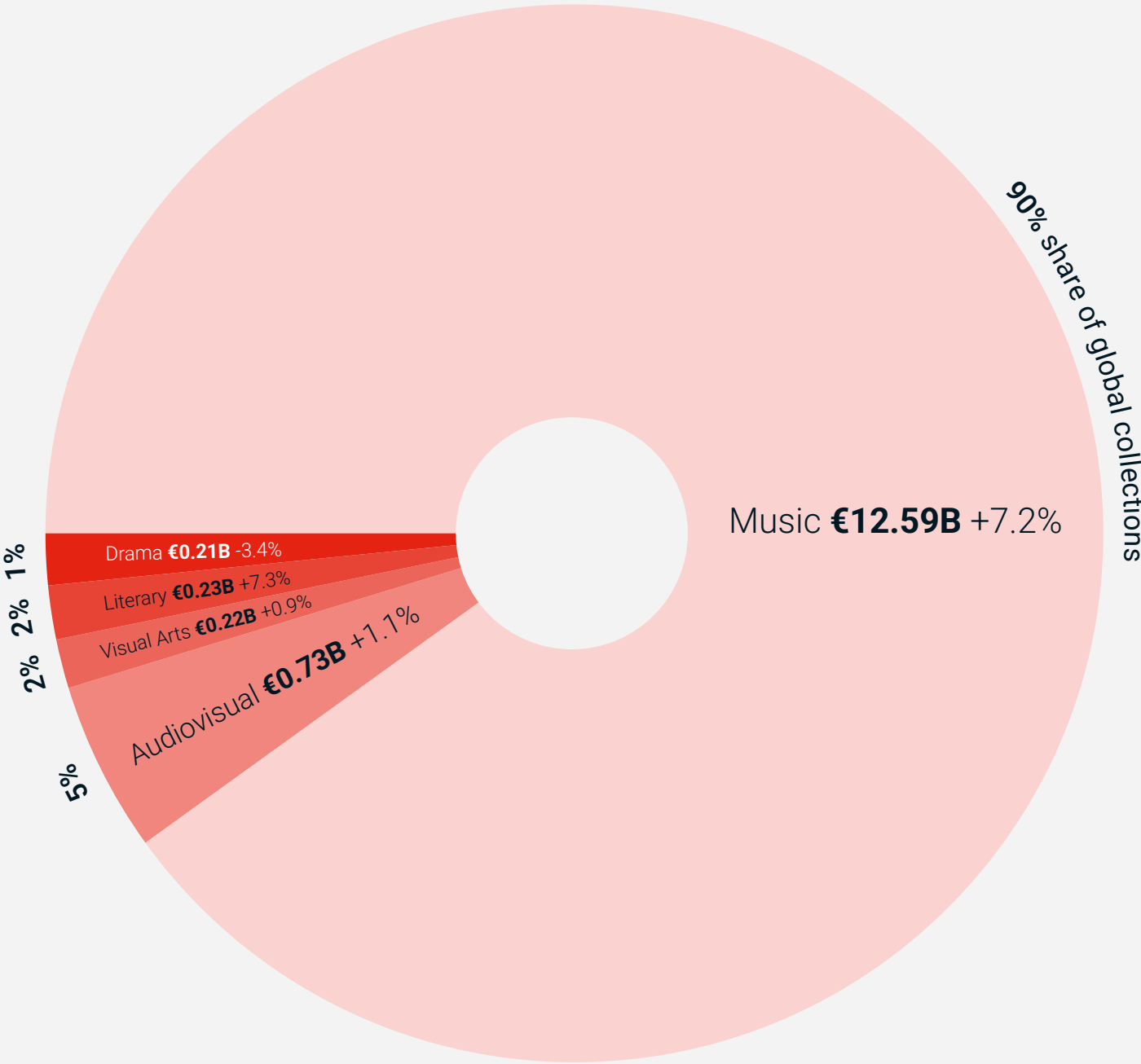
Digital collections (EUR billion) and annual growth 2015–2024



Music and literary repertoires lead creative sector growth

CISAC member societies recorded growth in four out of five repertoires in 2024. Music and literary income both rose by more than +7%, followed by strong performances in audiovisual and visual arts. Only the dramatic repertoire saw a decline, falling by -3.4% after two years of post-pandemic recovery.

Collections by repertoire (%), 2024 (EUR billion)

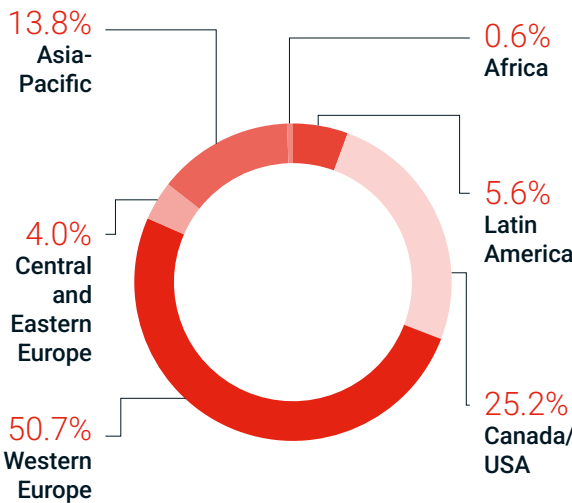


Europe dominates global collections with over 50% market share

Europe continued to anchor the global collections landscape in 2024, commanding more than half of the world’s total revenues. Western Europe alone accounted for 50.7% of global collections, driven by steady growth of +6.7% year on year. North America followed at 25.2%, with revenues in Canada and the USA doubling over the past decade to EUR3.5 billion, fuelled by a +10% annual rise in digital income. Asia-Pacific strengthened its position with 13.8% of global collections, while Latin America represented 5.6% after two years of strong post-pandemic recovery.

Africa saw collections rise by +14.2% to reach EUR90 million for the first time, driven by a +10% rise in music collections and a remarkable +90.8% surge in literary collections, following the launch of reprography collections in Morocco. Yet despite this increase, Africa’s share of global revenues has gradually declined in recent years as larger markets continue to expand at a faster pace.

Share of collections by region (EUR million)

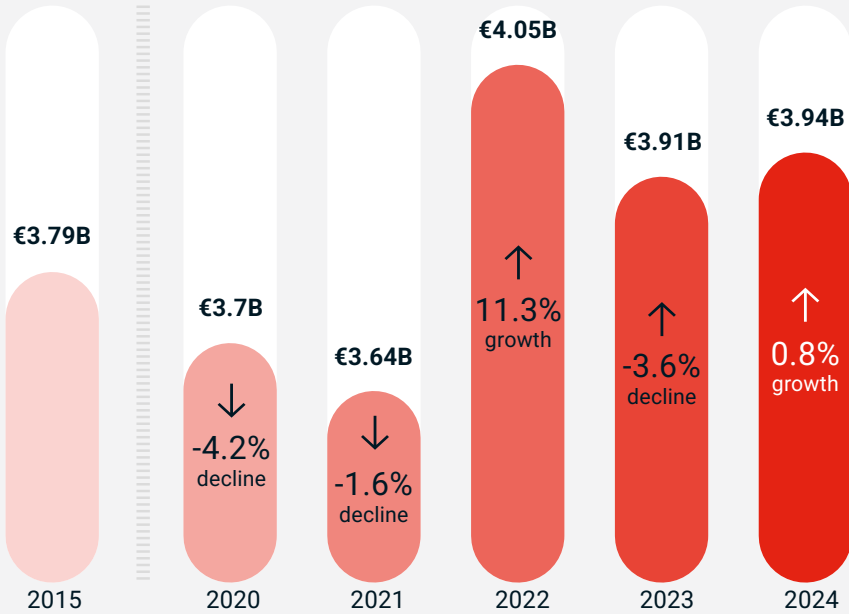


TV & radio revenues edge upward amid shifting listening habits

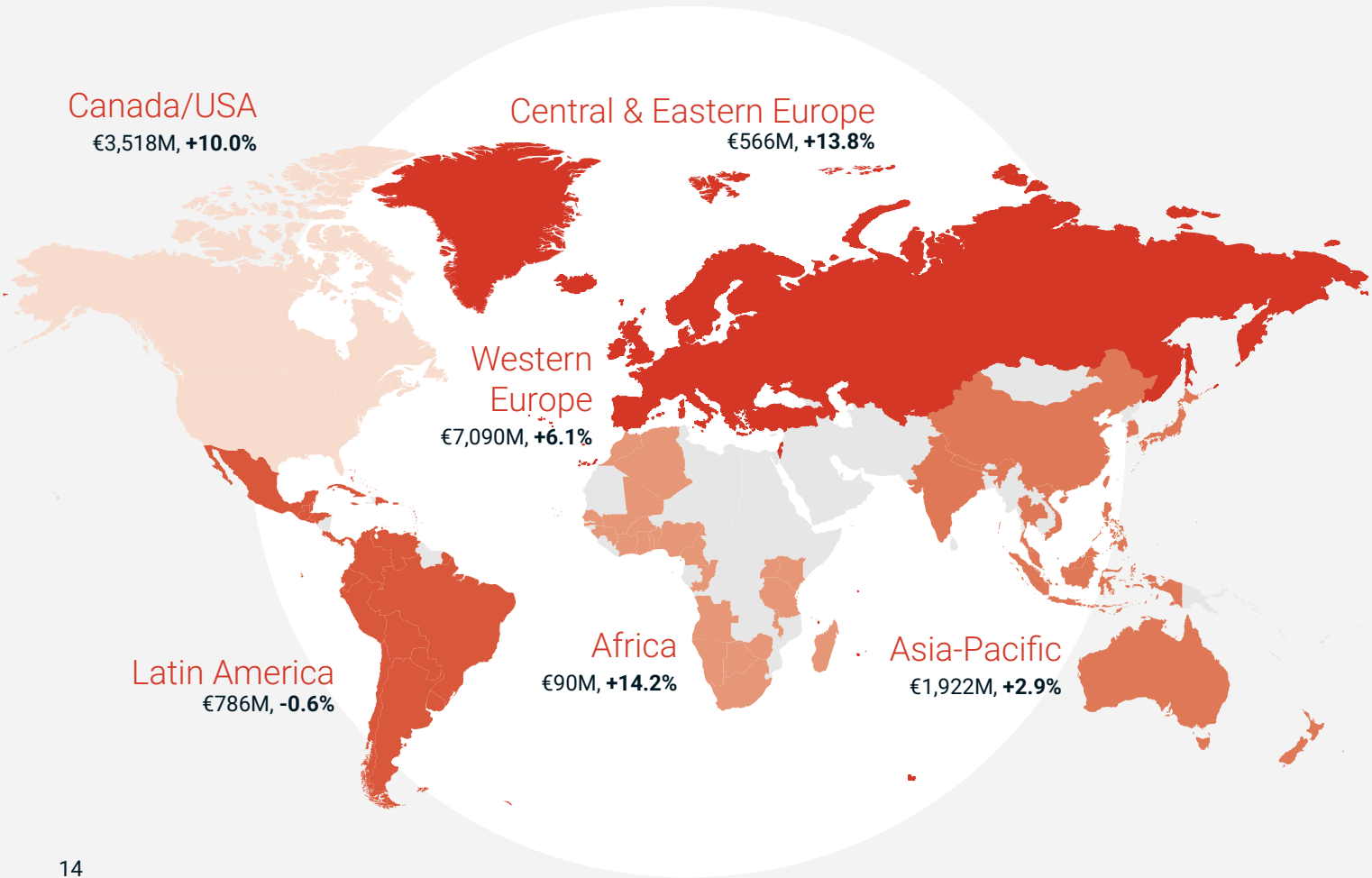
Broadcast income returned to growth in 2024, increasing by +0.8% after a -3% decline the previous year. While nearly half of all countries recorded national declines in the sector, reflecting the rising popularity of digital subscription models, this was offset by strong gains in the USA, France and Spain.

These three markets accounted for 47.2% of global TV & radio income, with growth of +3.5%, +3.9% and +20.3% respectively, contributing over EUR80m to the global total. Despite this recent rebound, overall TV & radio revenues have grown by just +3.8% since 2015.

TV & radio collections (EUR billion) and annual growth 2015–2024



Collections and growth by region (EUR million)





Global growth driven by major markets, supported by broader industry gains

All but one of the world’s largest collecting markets reported growth in 2024. Together, these markets saw a combined increase of +6.8%, outperforming the +5.7% rise recorded across all other countries. This group of ten markets also accounted for three-quarters of the global total and 78.2% of global growth, reinforcing their dominant role in the international collections landscape.

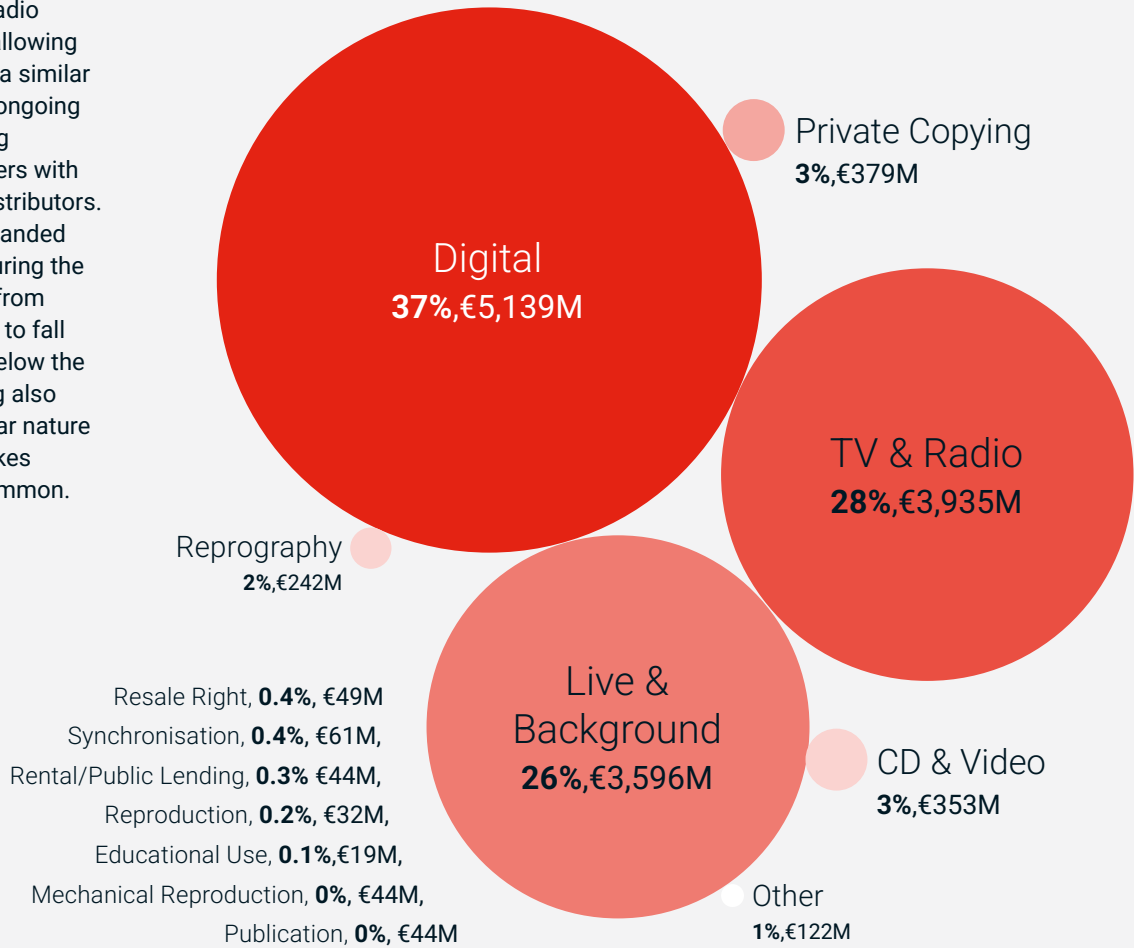
Collections per country/territory (EUR million) and growth in 2024

Country/Territory	Collections	% Growth 2024	vs 2015	vs 2020
United States	3,147	+10.8%	+103.6%	+62.0%
France	1,910	+7.5%	+75.7%	+58.3%
United Kingdom	1,261	+7.4%	+72.5%	+87.2%
Germany	1,075	+3.4%	+50.9%	+28.8%
Japan	886	-1.1%	+15.5%	+5.2%
Italy	729	+4.3%	+22.4%	+74.9%
Australasia	440	+3.0%	+64.5%	+35.3%
Canada	371	+3.2%	+71.6%	+57.4%
Spain	371	+12.3%	+65.2%	+78.8%
Netherlands	338	+7.1%	+59.2%	+39.7%
Top 10 Total	€10,527M	+6.8%	+65.6%	+52.0%

Digital extends lead despite broadcast return to growth

The market share of TV & radio declined by -1.6% in 2024, allowing digital to extend its lead by a similar amount. This reflected the ongoing consumer trend of replacing traditional linear broadcasters with on-demand subscription distributors. Live & background also expanded its share, rising by +0.7% during the year. Conversely, revenues from physical formats continued to fall with the total now -37.7% below the 2015 figure. Private copying also decreased, but the multi-year nature of these levy payments makes fluctuations much more common.

Global mix of creators’ income streams in 2024 (EUR million)



Digital extends lead in smaller markets

Digital revenue continued to account for the highest share of smaller global markets, with the top six—Mali, Nepal, Philippines, Indonesia, India and Vietnam—each surpassing 75%.

This demonstrates the importance of digital collections to creators in these countries. For comparison, the digital market shares for USA, France and UK were 27.1%, 13.9% and 11.4% respectively.

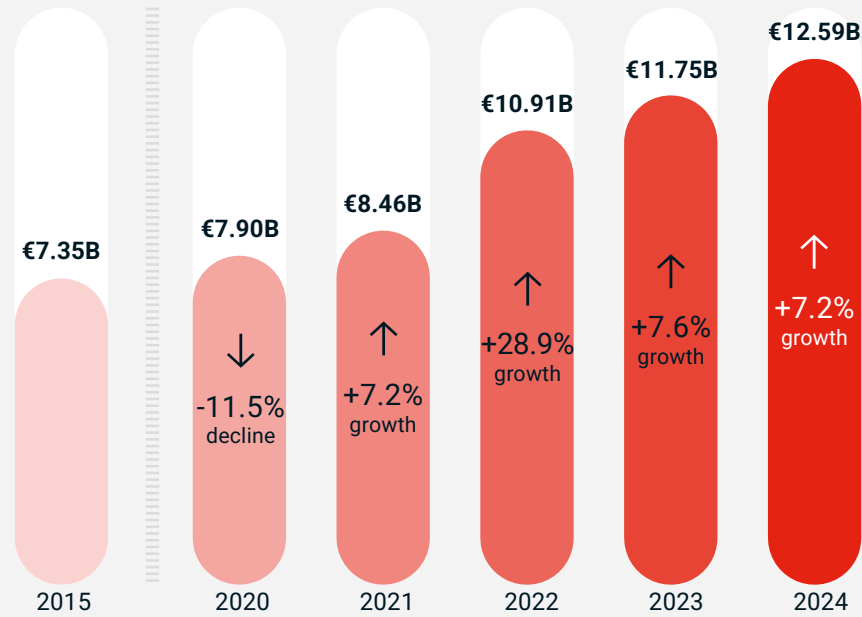
Leading smaller markets by digital share (2024) and growth 2015–2024

Country/Territory	Market share	Growth 2024	vs 2015	vs 2020
Mali	89.9%	8.2%	-	+2548.5%
Vietnam	86.6%	15.7%	+1732.5%	+197.5%
India	82.7%	56.7%	+67630.9%	+1020,2%
Indonesia	82.5%	24.7%	+2657.4%	+72.9%
Philippines	80.9%	12.3%	+2657.4%	+374.7%
Nepal	78.2%	26.7%	+9101.9%	+236.4%
Thailand	69.1%	13.6%	+21513.2%	+39.0%
Mexico	65.1%	8.4%	+5523.0%	+155.5%
Hong Kong	64.0%	1.0%	+3203.2%	+39.6%
Ukraine	63.3%	313.7%	+617.0%	+21.1%

Digital, live and background see double-digit music growth

Music royalties increased by +7.2% with the EUR12.6bn total representing a rise of two-thirds over the decade. A +10.8% increase in digital was driven by market growth in the USA, France and UK, whilst new digital contracts also helped smaller countries to thrive. Live & background income grew +10.4%, assisted by more live events and higher ticket prices. Together, these two leading revenue streams comprised three-quarters of the repertoire total. Broadcast income was bolstered by strong performance in Eastern Europe, but the +1.2% increase was not sufficient to keep pace with other revenue.

TV & radio collections (EUR billion) and annual growth 2015–2024



2024 market analysis

Digital revenue surpasses EUR5bn as global royalty collections grow +6.6%

Global royalty collections rose by +6.6% in 2024, reaching a record EUR13.9bn. Digital continued its strong growth trajectory, surpassing EUR5bn for the first time to remain the leading revenue source for creators worldwide.

Live & background income grew by +9.6%, continuing its post-pandemic rebound. Meanwhile, TV & radio returned to growth after a decline in 2023, contributing to the overall market uplift. Since 2015, total collections have increased by +65.2%. This sustained momentum highlights the importance of modern licensing frameworks and policy support in unlocking new value for rightsholders.

As creators and CMOs adapt to shifting consumption trends, the continued expansion of digital markets offers a powerful opportunity to strengthen rights management and increase revenues. Leveraging this growth, while ensuring equitable access and fair remuneration, will be key to fostering sustainable creative economies, both in mature markets and regions where collections remain nascent but full of potential.

Since 2020, digital income has soared by +110.6% to become the leading revenue source for creators. Remarkably, nearly 54% of all new income generated during this period came from digital, driven primarily by the surge in streaming subscription revenue. Over the past decade, digital has added nearly EUR4.4bn in revenue, rising from the third-largest income stream to become the dominant source of earnings for creators worldwide.

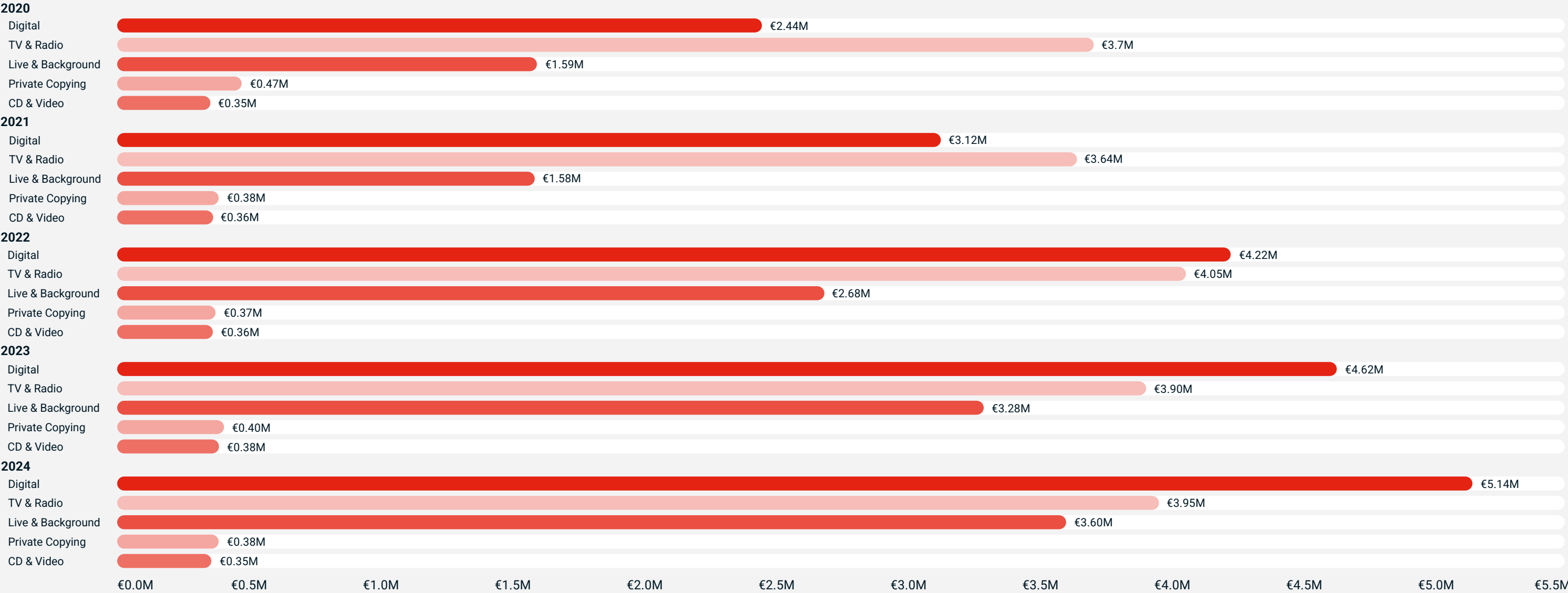
TV & radio income rose more modestly during this time, having risen by only +3.8% between 2015 and 2024. After losing its long-held status as the top income source to digital in 2022, broadcast now faces the real prospect of dropping behind live & background in the near future. Live income finished +37.9% higher in 2024 than where it stood in 2015. It generated just EUR339m less in income than TV & radio. In 2015, the income gap was around EUR1.2bn.



+110.6%

digital income growth since 2020

Creators’ major collection sources, 2020–2024 (EUR million)



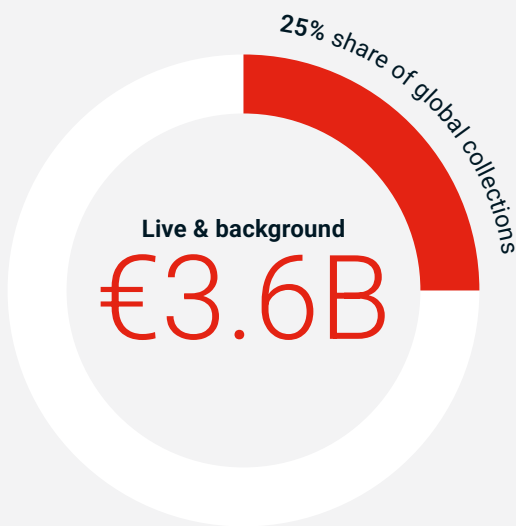
Smaller markets accelerate alongside global leaders

Revenue growth has been broadly shared across both major and emerging markets over the past ten years. While the top ten markets recorded a strong +65.6% increase between 2015 and 2024, this was more than matched by a +65.2% rise globally. Three of the top ten countries surpassed the global average, led by the United States with an impressive +103.6% increase. At the same time, smaller and developing markets such as Ukraine, Venezuela and Zimbabwe recorded even faster growth, propelled by expanding digital ecosystems and improved rights management. This widespread momentum highlights the growing strength of collective management globally, and the opportunity to scale progress by supporting innovation and infrastructure across all markets, regardless of size or maturity.

Live & background reach new record levels

Live & background royalties climbed to a new all-time high to finish above EUR3.5bn in 2024, marking a +9.6% year-on-year increase and capturing just over 25% of global collections. The sector has added more than EUR900m in annual income over the past decade, underscoring its consistent growth and value for creators.

Canada/USA led the charge with a +15.7% increase, outpacing digital growth in the region. The sector was up in all regions, except Latin America where income marginally declined. Despite the rise of digital, live & background remains a cornerstone of global royalty revenue, offering strong returns for creators and CMOs alike.



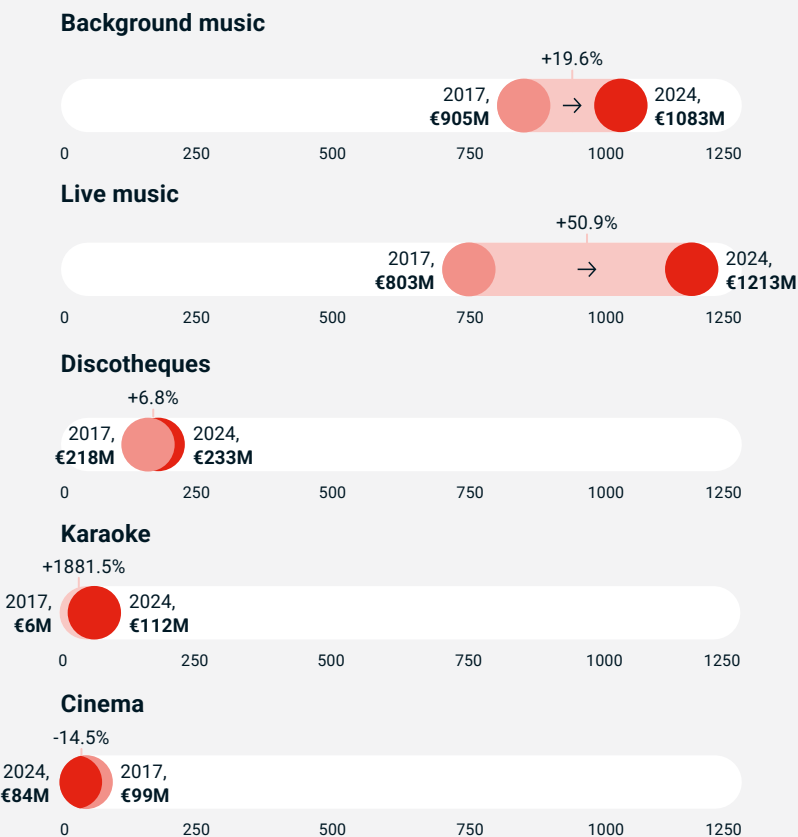
Live music races ahead as karaoke and cinema lag behind

Data collected from over 100 CISAC member societies reveals the rapid growth of live music. Since 2017, when this data was first sourced, live music income has increased by more than +50% and in 2024 increased year-on-year by +15.1%. Background music has also performed strongly in this time, with annual revenue up by +19.6% from where it was in 2017.

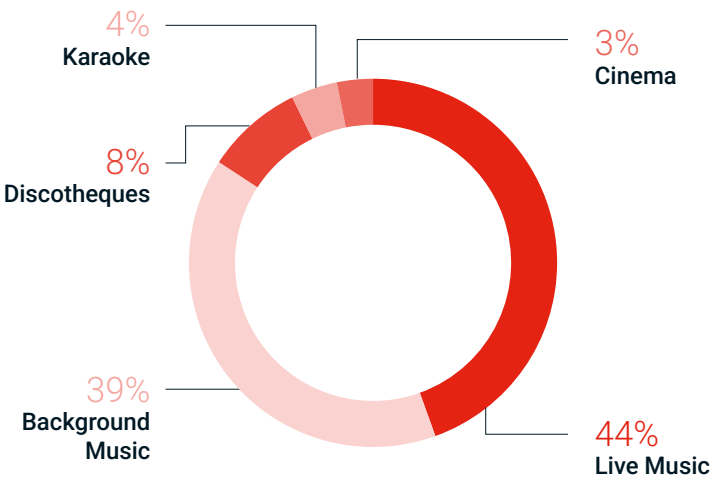
In contrast, cinema revenue has not returned to its previous peak, having dropped by -14.5% since 2017 when annual income was nearly EUR100m. Despite a 2025 report from Omdia and WIPO highlighting a record year for global film production in 2024, cinema collections have yet to benefit. Global box office revenue fell -8% year-on-year in 2024 and remained over USD11bn below 2019 levels, largely due to a -24% drop in China's box office income.

There is some cause for optimism: data from Comscore indicated an +8% rise in global box office revenue during the first half of 2025, suggesting a potential turnaround may be underway.

Live & background growth of main income streams 2017–2024 (EUR million)



Live & background main income streams in 2024

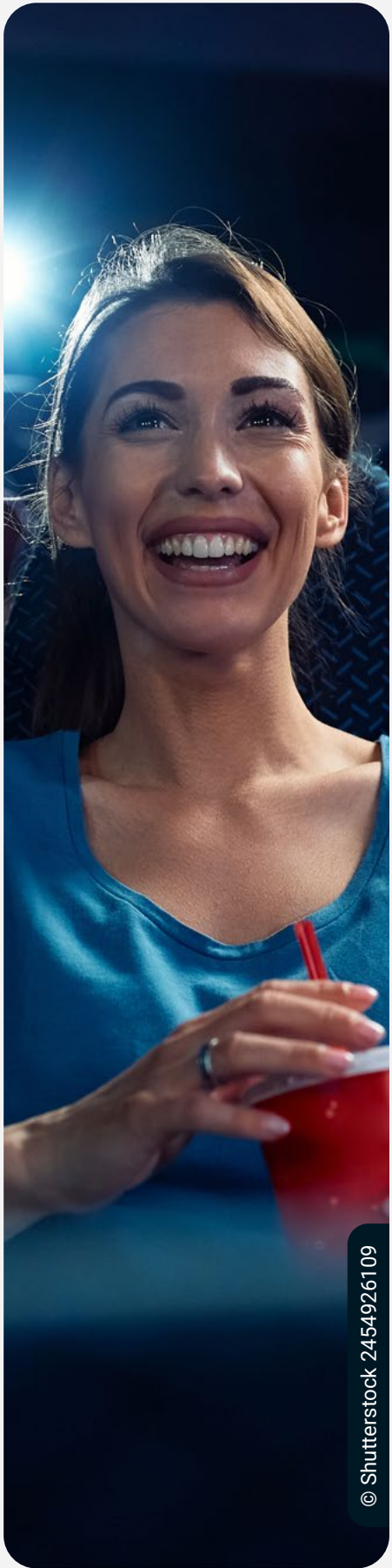


Growth of live & background collections by region

Region	2024	vs 2015
Africa	+13.8%	+8.4%
Asia-Pacific	+6.1%	+27.2%
Canada/Usa	+15.7%	+72.1%
Latin America	-1.0%	+17.3%
E. Europe	+14.3%	+34.4%
W. Europe	+9.7%	+36.5%
Grand Total	+9.6%	+37.9%

Live & background royalties surpass EUR500m in North America

In 2024, Canada and the USA recorded the fastest growth in live & background collections globally, with revenue rising by +15.7% year-on-year, surpassing even the region's digital growth rate of +14%. This brought the total to EUR537m, marking the first time the sector has exceeded the EUR500m threshold. Since 2015, live & background income in the region has increased by +72.1%. Asia-Pacific continued to build on the momentum of 2023, registering further increases in collections through strong demand for live events and background music licensing. In Latin America, despite a surge in major concert tours across Argentina, Brazil, Chile, Colombia and Mexico, income declined slightly year-on-year. Meanwhile, Central and Eastern Europe saw a healthy +14.3% annual increase, underscoring the sector's strong global trajectory.



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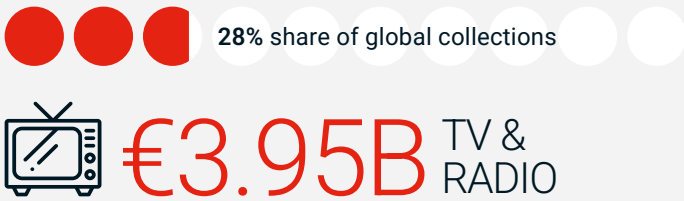
Live sector faces dual realities as momentum stabilises

The global live music industry marked another record-setting year in 2024, though momentum began to level off following the rapid surge in revenue seen during the initial post-pandemic years. Industry publication *Pollstar* described 2024 as “strong and steady”, highlighting a shift from the explosive “Golden Age of Live” that began in late 2021 to a more stable period of moderate growth. This trend was reflected in the financial results of leading promoter Live Nation, whose revenue growth slowed to just under +2% in 2024, following a +36% increase the previous year.

Despite this deceleration, the long-term trend remains striking. Since 2019, the combined revenues from the world’s top 100 tours have grown by +71%, including record-breaking runs in 2024: Taylor Swift’s tour became the highest grossing of all time, while Coldplay set a record for most tickets sold. However, this success at the top contrasts sharply with ongoing challenges at the grassroots level, where venue closures in several countries continue to limit opportunities for emerging artists.

TV & radio: on the rise again

Broadcast collections returned to growth in 2024 following a dip the previous year, reaching EUR3.95bn. While this marked one of the sector’s highest totals ever, it still lagged more than EUR1.2bn behind digital, which continues to lead global royalty collections. Over the past decade, broadcast revenues have increased by just EUR0.14bn, compared to a EUR4.4bn rise in annual digital collections.



TV & radio’s share of total global collections fell below 30% in 2024, even as the sector posted strong revenue. The growing gap between broadcast and digital reflects a continued shift in consumer behaviour, with streaming services gaining ground. In May 2025, Nielsen reported that streaming in the US surpassed the combined share of broadcast and cable viewing for the first time, making up 44.8% of total television usage. Broadcast accounted for 20.1%, and cable 24.1%. YouTube led all platforms with a 12.5% share, followed by Netflix at 7.5%, maintaining its position as the leading SVOD provider for a fourth consecutive year.

Meanwhile, global advertising reached new heights. According to the World Advertising Research Center (WARC), ad spend surpassed USD1tr in 2024 for the first time. Since 2014, ad revenues have more than doubled, growing 2.8 times faster than global economic output. WARC forecasts a further +10.7% rise in 2025, although WPP Media revised its outlook mid-year due to uncertainty surrounding US trade policy.

CISAC continues to prioritise improvements in broadcasting licensing and collections, particularly in regions like Africa. In late 2024, CISAC’s regional office conducted a compliance and enforcement survey to assess licensing gaps. This has led to coordinated legal actions in 2025, including litigation aimed at enforcing rights and improving collection outcomes.

Digital opens up EUR1.2bn lead over broadcast revenues

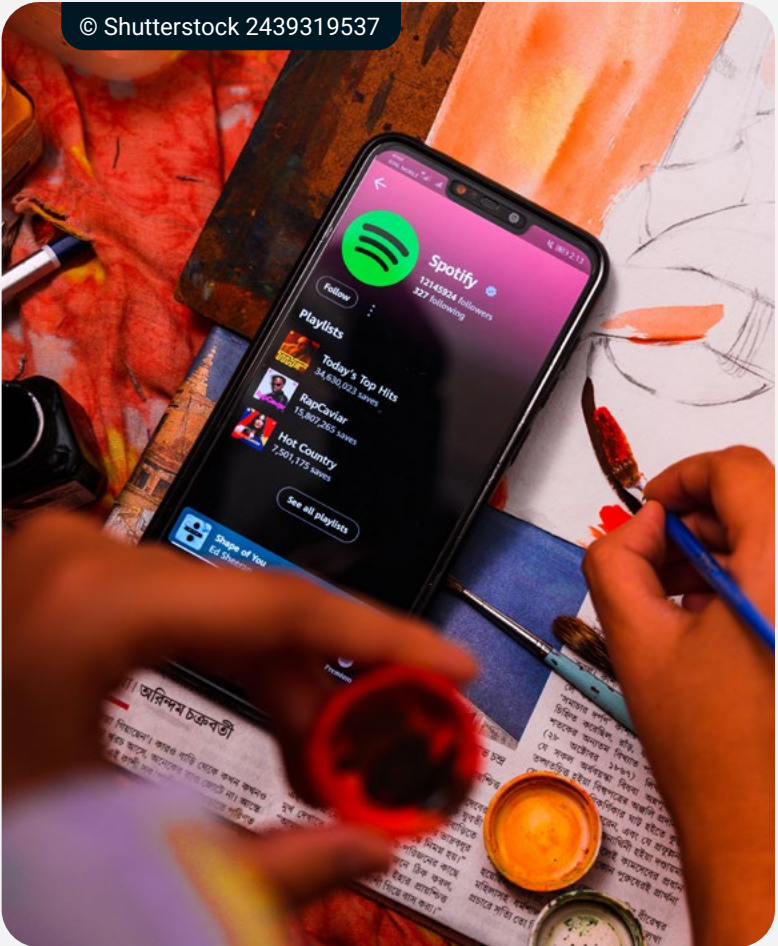
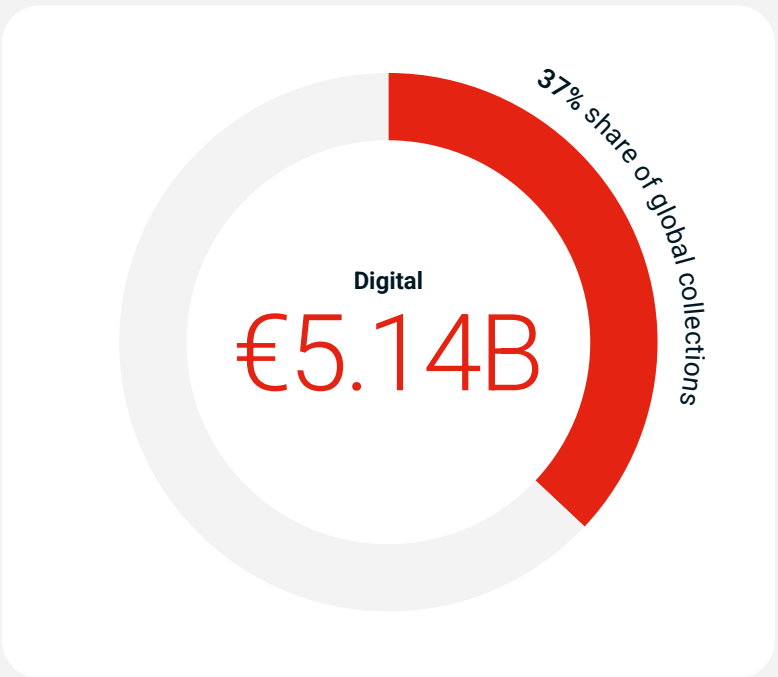
Digital collections accelerated in 2024, with annual revenue rising by +11.2% to reach EUR5.14bn. This extended its lead over TV & radio as the top income source for creators. The sector is now more than six times larger than it was in 2015 and accounts for 37% of total global collections. Compared to a EUR4.4bn rise in annual digital collections.

Driven by continued growth in global streaming subscriptions, digital collections rose again in 2024, outpacing the +9.6% increase seen in 2023. Spotify, the leading digital service provider, expanded its premium subscriber base by 11% to reach 263 million by the end of the year, with an additional 5 million subscribers added in Q1 2025. According to Midia Research, global music subscription numbers hit 818 million in 2024 and are forecast to reach 1 billion by 2027.

Price increases also contributed to revenue growth, with Spotify raising subscription fees in several markets for the first time since its launch, starting in July 2023. In January 2025, Spotify in the US won a legal challenge brought by the Mechanical Licensing Collective over its contentious decision to reclassify its premium tier as a “bundle”, a move designed to reduce the mechanical royalty rate. Estimates suggest this strategy could reduce payouts to rightsholders, songwriters and composers by USD3.1bn by 2032.

Other controversial developments in the streaming ecosystem include the introduction of “Streaming 2.0” models by several DSPs, including Spotify. These models require tracks to meet a minimum annual threshold of streams before qualifying for royalty payments. Critics argue this reinforces a two-tiered system that deprioritizes emerging creators and consolidates revenue among top performers. The debate is intensifying amid other challenges facing creators, such as platform oversaturation, streaming fraud and the proliferation of generative AI music.

CISAC’s pioneering global study on AI’s impact across the music and audiovisual sectors projects that generative AI music could account for up to 20% of streaming revenues on traditional platforms by 2028, an indicator of the urgency with which these issues must be addressed.



+71%

growth in global top-tour revenues since 2019, marking a record-breaking era for live music.

Private copying: Dips slightly but remains key income source





€379M PRIVATE COPYING

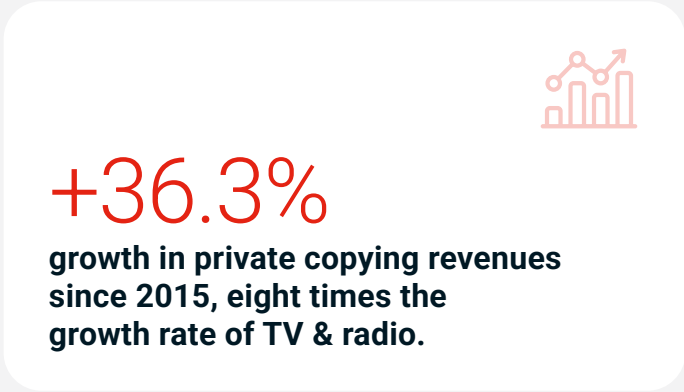
Private copying reversed its recent return to growth, with revenue declining by -6.4% year-on-year in 2024 to EUR379 million. Despite this dip, it remained the fourth largest income source for creators, behind digital, broadcast and live & background collections, and further widened its lead over income from CDs and video.

Private copying revenues are often cyclical, influenced by changing consumer habits, technology trends and policy developments. Since 2015, however, annual income has grown by +36.3%, eight times the growth rate of TV & radio. Over the same period, revenue from CD & video has declined by -37.7%. While current figures remain below the 2020 peak of EUR475m, private copying continues to play a crucial role in supporting creators and rightsholders. Levies on the sale of digital media and devices capable of copying works help fund a wide range of cultural programming and development initiatives.

On the policy front, 2024 brought notable progress. In October, the Senegalese government adopted a decree to implement the UEMOA (West African Economic and Monetary Union) private copying directive into national law. This milestone, the result of more than a decade of advocacy by CISAC and partners, marks a major step forward for creators in the region.

CISAC also supported efforts in Bulgaria, host of the 2025 General Assembly, where member society MUSICAUTOR is working to establish an effective private copying system.

However, setbacks remain. In 2024, the Finnish government halved its state-funded private copying compensation, cutting the annual amount to EUR5.5m. CISAC is actively supporting efforts to reverse this decision, which would negatively impact the country's creative sector.



A dancer performs at the KOMCA 60th anniversary dinner in Seoul during CISAC's 2024 General Assembly week.

Futuresource analysis

INTERCONNECTING BUSINESS MODELS: The ever-evolving world of music and video streaming



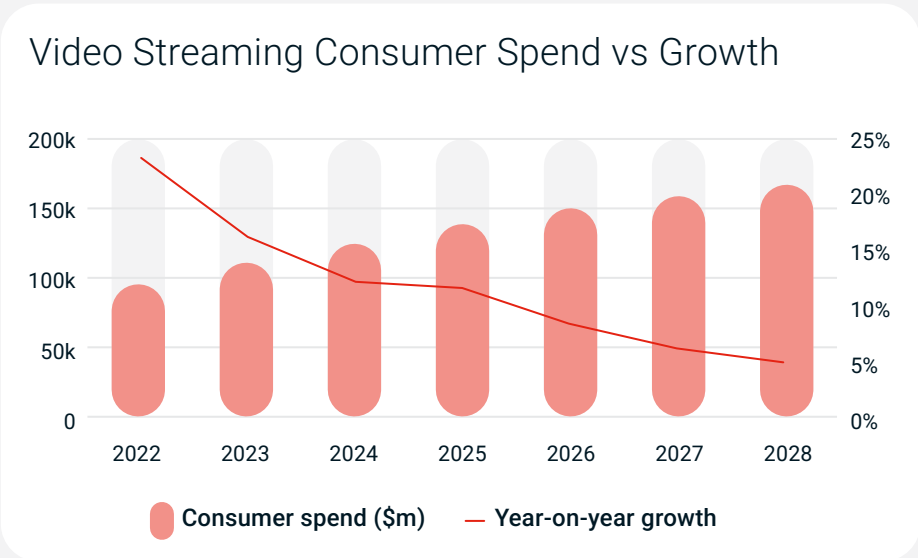
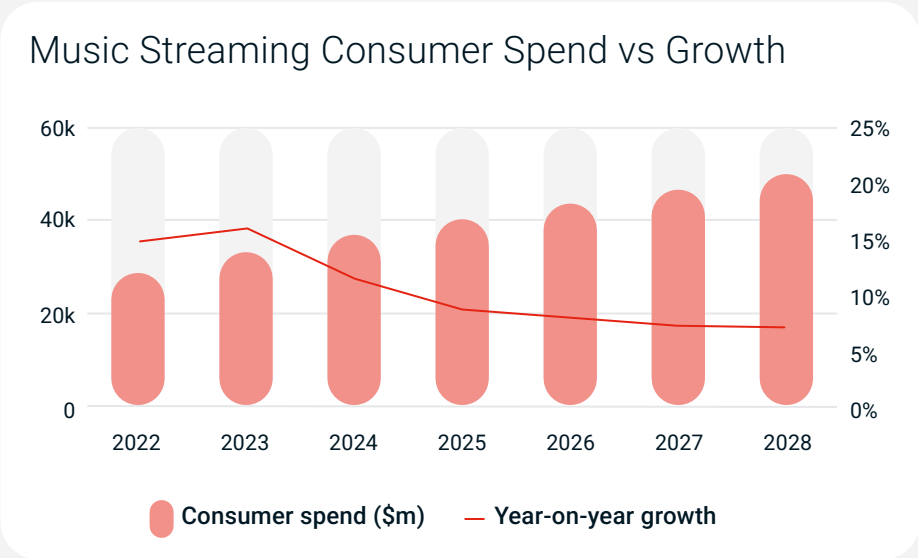
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As global coverage becomes the norm for streaming operators, competition is shifting from acquisition to retention.



James Duvall
Principal Analyst,
Futuresource Consulting

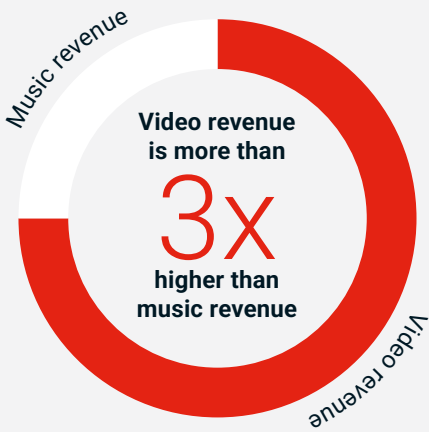
Futuresource Consulting’s James Duvall looks at the forces shaping the next chapter of music and video streaming.

Over the course of the last decade, streaming hasn’t just changed how we watch and listen. It has rewritten the rules of the entertainment business. From living rooms to commutes, streaming has become the dominant gateway to music and video, fuelling years of double-digit growth and redefining how content is created, distributed and monetised.



Between 2022 and 2025 alone, global consumer spend rose by an average of 12% in music and 13% in video, with both sectors surging together. Video still generates more than three times the revenue of music, yet their growth curves have been strikingly parallel, which is a sign that streaming’s transformation is a shared story across both industries.

Looking ahead, we’re entering a new phase. Futuresource forecasts show slower but sustained growth between 2025 and 2028, around 7% CAGR for music and 6% for video, as services shift from rapid subscriber acquisition to a focus on revenue per user and locking in loyalty. The competitive battleground is now all about broadening content portfolios, refining tier structures and keeping audiences engaged in the long run.



Expanding the content playbook

With most major services now enjoying global coverage, differentiation is increasingly about content range and delivery formats.

Sports rights are one of the most active frontiers. Traditionally the domain of Pay-TV operators, premium sports coverage is now deployed by streaming platforms to drive reach and retention. The NBA and WNBA have extended international agreements through Amazon Prime, while Warner Bros. Discovery has leveraged HBO Max in markets like France, to push live sports as a subscription driver.

Beyond sport, we’re seeing short-form, professionally produced video emerging as a lucrative segment, particularly in China and India, where micro-dramas of one to two minutes per episode are attracting billions in ad-funded revenues, micropayments and bundled subscriptions. India alone could see this category generate US\$5 to 10 billion in the next few years, while the US market is still in the early stages.

Live events are also expanding. Netflix has broadcast award ceremonies. Amazon Prime has trialled pay-per-view. Music services have evolved beyond audio into full-length music videos, video podcasts and exclusive premium features. Spotify’s video rollout now spans over 80 countries, while Apple Music is experimenting with new fan-focused tiers like “DJ with Apple.” These developments are not only keeping audiences engaged, they’re opening fresh monetisation opportunities for creators.

The rise of ad-supported tiers

One of the most significant structural shifts is the adoption of advertising-supported tiers. Across most leading services, cheaper ad plans are helping reduce churn, broaden reach and boost average subscriptions per household.

Netflix’s ad tier has grown from 16% of subscribers in mid-2023 to 35% in 2025 across the markets we’ve surveyed. Disney has seen similar momentum, rising from 17% to 25%, while Amazon Prime’s introduction of ads by default now means three-quarters of households in participating markets view ads unless they pay for an upgrade.

For collective management organisations and creators, the upside is clear: ad-funded models extend exposure to works, especially among price-sensitive audiences. Improved targeting and data-driven segmentation are also raising ROI for brands, increasing the value of ad inventory and helping platforms sustain lower-tier pricing.

Pay-TV evolves into aggregator and partner

2025 has brought bold moves from public service broadcasters and Pay-TV operators in Europe, signalling that they are not surrendering the streaming era to digital-native rivals.

In France, France.tv has made its full public service channel line-up available within Amazon Prime Video, extending reach to younger, streaming-first audiences. TF1, the country's most-watched channel, has partnered with Netflix to stream all five of its channels and on-demand content directly via the Netflix app from 2026.

In Germany, RTL Group's acquisition of Sky Deutschland will unify 11.5 million paying subscribers under a combined sports-and-entertainment portfolio, spanning both broadcast and streaming. These moves show that legacy broadcasters are repositioning as content aggregators, blending traditional strengths in local programming with new digital distribution muscle.

A question of tariffs

While market forces dominate streaming strategies, policy shifts can have just as profound an effect. In 2025, the US entertainment industry has faced uncertainty over proposed tariffs on foreign films and manufacturing inputs for media products.

An agreement on 4th September between the US and Japan established a baseline 15% tariff across all imports, which would include lacquer for vinyl production, which is higher than before, but well below feared levels. However, potential 100% tariffs on foreign-produced films remain unresolved, prompting broader debate on domestic production incentives and infrastructure investment.

For countries that have still to reach an agreement on new tariffs and where they have traditionally played a role in importing consumer electronics to the US, proposed increases across devices such as TVs and smartphones, could slow device replacement cycles, affecting how quickly audiences adopt new viewing and listening experiences.

The outlook for CMOs

The message for collective management organisations is one of opportunity through diversification. Streaming remains a growth market, but its expansion now depends on multi-pronged strategies:

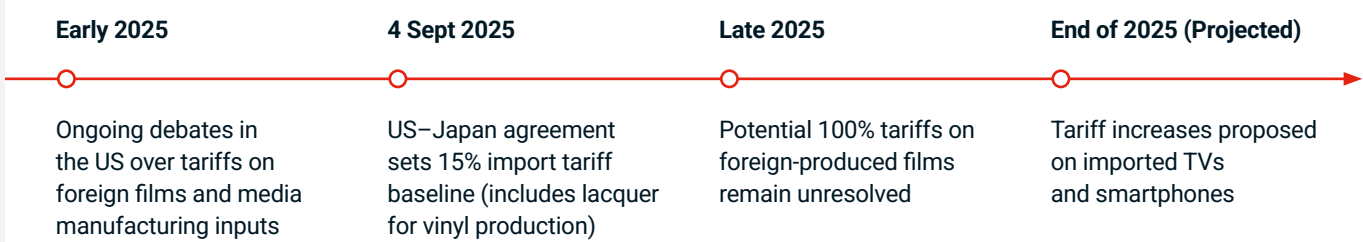
- Broader content formats that engage different audiences
- Flexible tiering that balances price sensitivity with upsell
- Partnerships between broadcasters, Pay-TV and streamers to extend local content reach
- Global sports and live event rights that draw both loyal fans and casual viewers

As audiences expand their content mix and the number of services they use, the exposure of copyright works will rise, driving potential for increased collections. Even in a slower-growth environment, the combination of new formats, wider distribution and stronger retention strategies is setting the stage for sustained value creation across both music and video sectors.

Notes and source data:

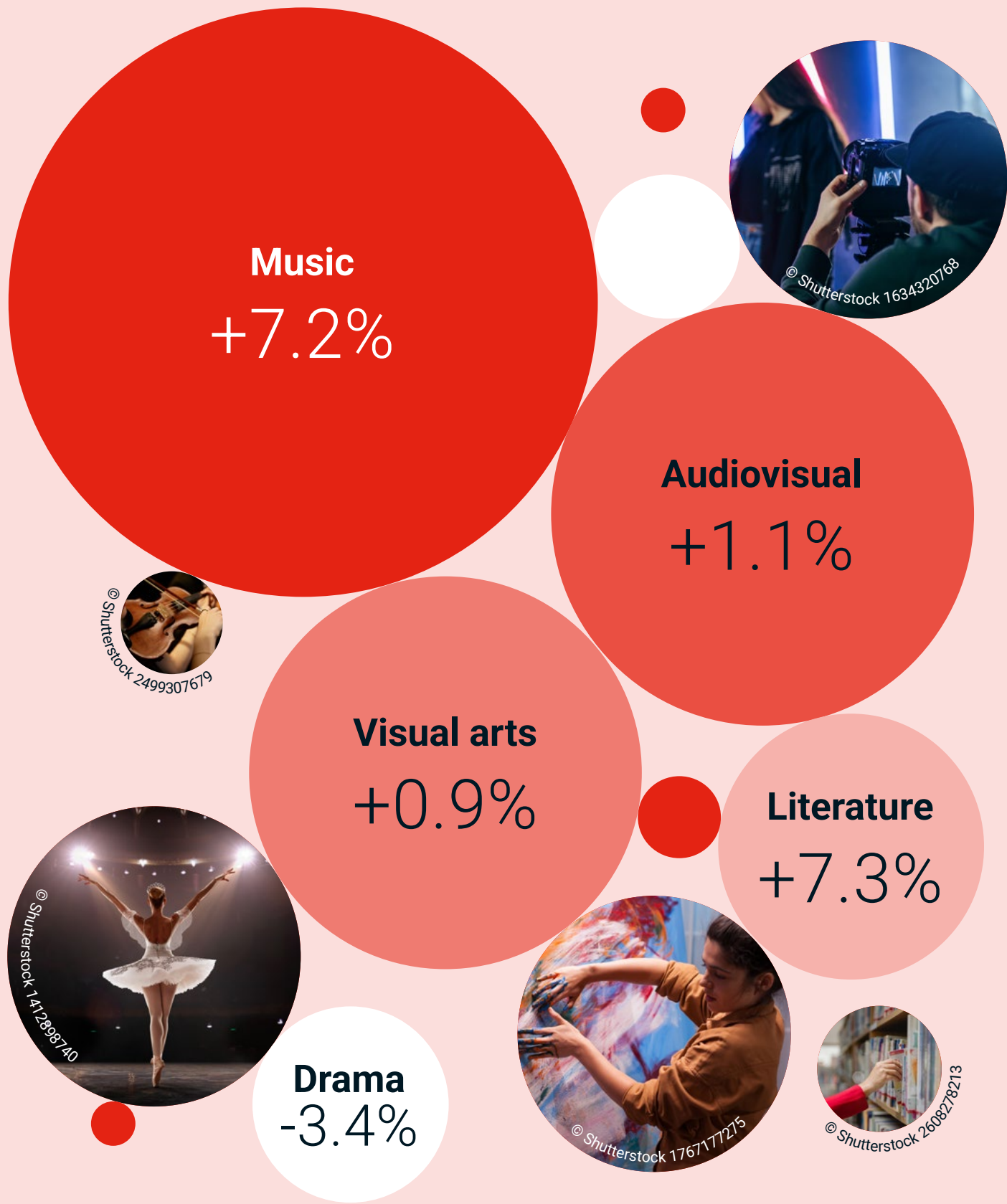
Market sizing from Futuresource tracking across video and music sectors
Consumer profile information from Futuresource surveys (Music: Audio Tech Lifestyle Aug 2025; Video: Living with Digital Aug 2025)

Policy shifts reshape global media trade in 2025



2024

Collections by repertoire



Collections by repertoire

Music

Music collections exceed EUR12bn globally for the first time

Global revenues for music creators increased by +7.2% to reach EUR12.59bn. This was primarily driven by strong performance in digital collections and by similar double-digit growth in live & background collections. Together, these two revenue streams now make up two-thirds of the total music market.

Following a -5.3% drop in 2023, the broadcast sector returned to growth and rose by +1.2% whilst physical music sales saw the opposite trend, falling by -7% after rallying the previous year.

Collections from private copying, the small levy placed upon the sale of recordable media and electronic products, are often cyclical as back payments are common. In 2024, this sector fell by -4.3% following a +11.9% rise the previous year. Income from sync licensing through collective management organisations grew for the fourth year in succession, increasing by +18.4% to reach a record EUR61.3m in revenue.

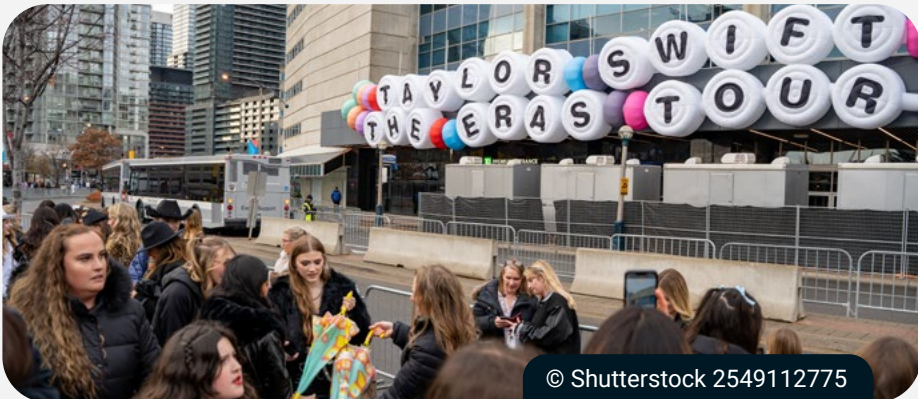


Global revenues for music creators increased by +7.2% to reach

€12.59B

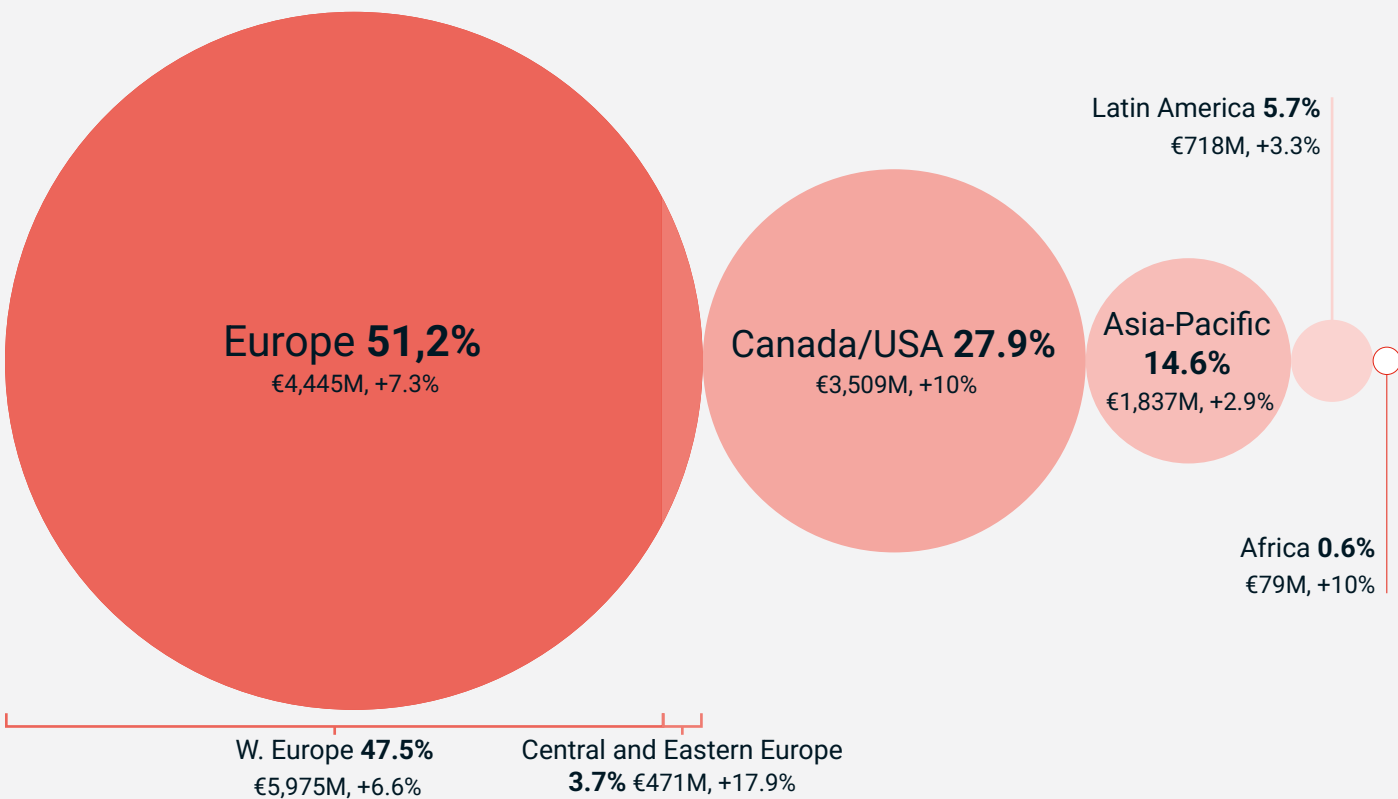
Top ten collecting countries/territories(EUR million)

Country/Territory	Collections	% Growth	vs 2015	vs 2020
 United States	3,140	+10.9%	+104.0%	+62.2%
 France	1,503	+7.9%	+92.6%	+66.6%
 United Kingdom	1,178	+8.2%	+79.5%	+92.7%
 Germany	1,019	+3.9%	+60.9%	+38.5%
 Japan	885	-1.1%	+15.6%	+5.1%
 Italy	576	+5.1%	+28.8%	+86.8%
 Canada	368	+3.2%	+70.5%	+56.3%
 Australasia	366	+3.5%	+105.3%	+50.9%
 Spain	299	+12.2%	+68.7%	+89.8%
 Netherlands	285	+8.8%	+58.8%	+54.5%
Grand Total	€12,587M	+7.2%	+71.2%	+59.4%



Taylor Swift's Eras Tour was the biggest tour of 2024, becoming the first tour to gross over \$1 billion USD in a single year.

Music collections by region (EUR million)



Digital music income breaks EUR5bn barrier

For the first time, collections from the digital use of music reached EUR5bn as growth accelerated to +10.8% in 2024. The total represents a sevenfold rise over the past decade with digital remaining comfortably the repertoire’s largest sector at 39.8% of total income.

Digital music collections saw growth in all the top ten countries, and combined, their revenue accounted for 83% of the global digital total. More than one-quarter of this total was generated in the USA, where collections grew by +16.1% to reach EUR1.4bn. Due to improved contracts and new distributor licences, Italy’s revenues grew the fastest amongst the top ten countries, rising +27.2%. .

Streaming market expansion allowed France and South Korea to realise increases above +12%, whilst in Mexico, new deals with platforms such as Crunchyroll, led to a rise of +8.4%. In the UK, PRS for Music reported +179% growth in video game revenue, whilst in Slovenia, digital income more than doubled following the 2023 decision by the Slovenian IPO to allow local society SAZAS to manage digital rights.

Digital collection champions (Music only) (EUR million)

Country/Territory	Digital Collections	Total Collections	% Share
 Mexico	161	232	69.4%
 Australasia	225	366	61.5%
 Canada	192	368	52.1%
 South Korea	138	276	49.9%
 United Kingdom	587	1,178	49.8%
 Japan	397	885	44.9%
 United States	1,394	3,140	44.4%
 France	650	1,503	43.3%
 Germany	309	1,019	30.4%

Central and Eastern Europe is the world’s fastest growing music region

For the first time, Central and Eastern Europe was the fastest growing region for music repertoire collections, rising by +17.9% to reach EUR470m. Digital income grew by +20.2% due to improved licensing conditions and cooperation with pan-European licensing bodies. However, despite an eightfold increase over the decade, digital still makes up a relatively modest 13.9% of the regional total. The broadcast sector dominated, rising by +16.3% due to strong performance in Poland, Türkiye, and a more than doubling of revenue in Slovenia due to a successful court litigation covering a past period. Broadcast totals exceeded EUR200m and made up 43.1% of the regional music total, with a lot of potential to further increase broadcast collections across Albania, Bosnia and Herzegovina, Armenia and Bulgaria in the future

Live & background also performed well, growing by more than one-fifth in Poland and Croatia as local societies continued to improve efficiency and maximise collections from the booming live concert market. Private copying revenue grew by +20.6% due to a +19.4% rise in Hungary and the start of collections in Serbia. Following CISAC’s lobbying efforts, an updated governmental decree allowed the inclusion of several digital devices for the first time.

Revenues in Uzbekistan doubled as local society SIIP gained a provisional membership of CISAC that helped to facilitate a mentorship programme from Polish society ZAiKS. Music collections in Central and Eastern Europe ended the year +55.7% above their 2015 total.

German collections exceed EUR1bn after rising +3.9%

Music revenues in Germany reached EUR1bn following a +13.7% boom in the thriving live & background sector. German music society GEMA cited an increase in major events, overall market growth and increased ticket prices as contributing factors. A new AI music monitoring device called “KIM” was successfully tested at festivals, improving processing efficiency while producing 2,600 setlists. Broadcast also grew, with income from TV & radio increasing by +1.8% in recovery from a -5% drop the year before. Conversely, private copying collections fell by -21.5% following a +27% rise in 2023. In contrast to many other countries, digital growth slowed in Germany, rising just +1.2% reflecting a slowdown in streaming market growth and the impact of accounting adjustments from previous periods.



+1.8%

increase in broadcast income from TV and radio marked a recovery from the -5% decline the previous year



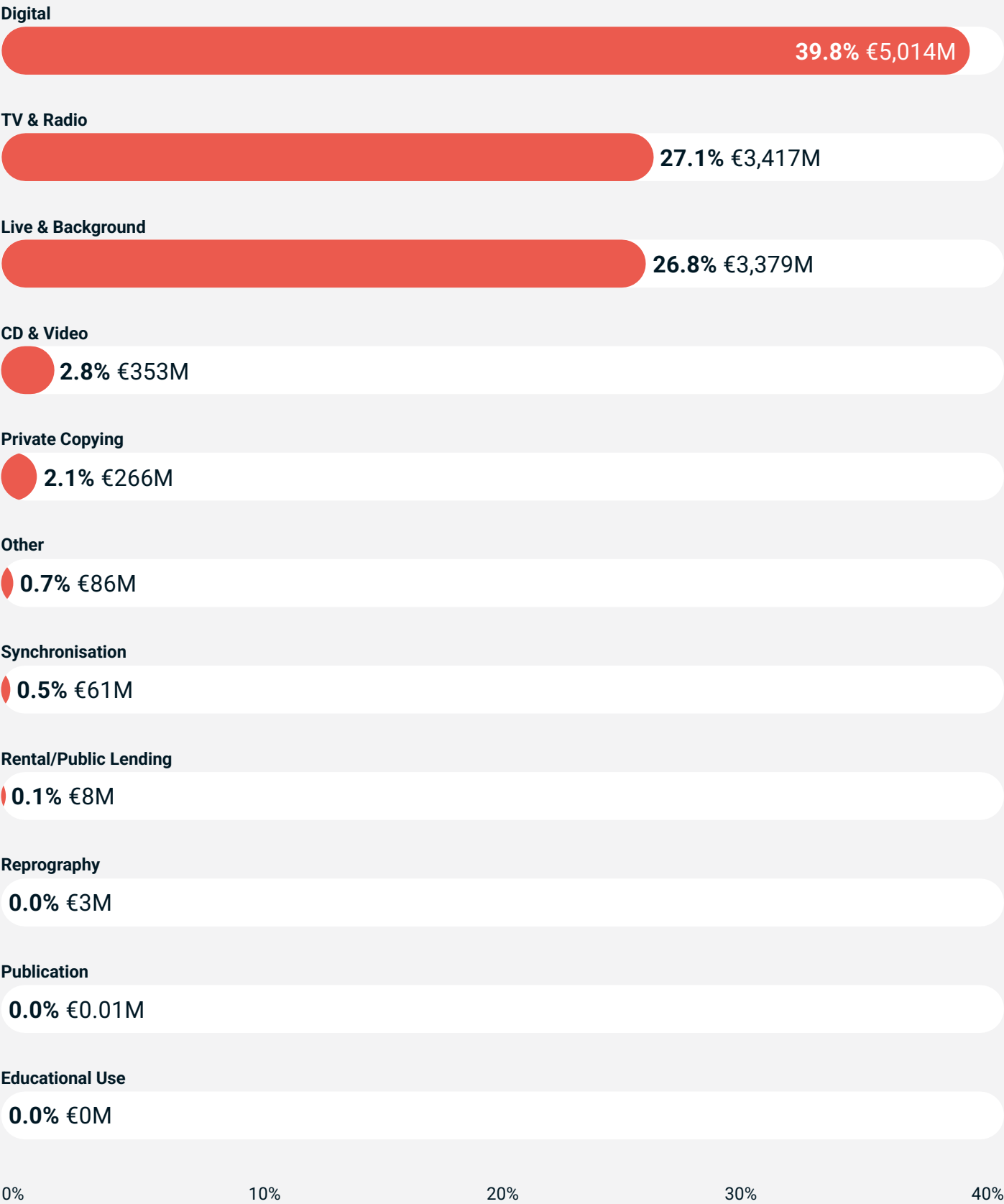
Smaller collecting territories see largest growth rates

While none of the ten fastest growing countries appeared in the top 30, many smaller revenue territories saw excellent results in 2024. In Europe, Türkiye, Slovenia, Ukraine and Uzbekistan were the top performers despite combined collections below EUR60m. In Latin America, Guatemala grew by +56.3% as collections from digital more than doubled, and in El Salvador, growth in all sectors drove a +73.6% increase. In Africa, broadcast revenues led to a +55.9% rise in Zimbabwe whilst live & background income in Kenya approached EUR1m to drive growth of +59.5%. Guinea's collections more than doubled due to a significant payment for private copying. In the Asia-Pacific region, Macau increased revenues by +51.3% due to its booming live concert collections.

Breakdown of collections by type of use (EUR million)

Use category	Collections	% Growth	vs 2015	vs 2020
TV & Radio	3,417	+1.2%	+2.3%	+5.1%
Digital	5,014	+10.8%	+596.2%	+109.0%
Live & Background	3,379	+10.4%	+39.9%	+126.9%
CD & Video	353	-7.0%	-37.7%	+1.3%
Other	86	+32.8%	+43.6%	+105.6%
Private Copying	266	-4.3%	+43.8%	-17.7%
Publication	0.01 M	0.0%	-99.9%	-99.8%
Rental/Public Lending	8	-5.8%	-72.2%	-37.1%
Reprography	3	+62.9%		+47.9%
Synchronisation	61	+18.4%	+87.7%	+131.6%
Grand Total	€12,587M	+7.2%	+71.2%	+59.4%

Share of collections by type of use (EUR million)



CISBY performs at the 2024 REMA festival in Ouagadougou, Burkina Faso.

© Hermann Doubouyou

Collections by repertoire

Audiovisual

Audiovisual normalises after +32.6% sector growth over 10 years

After two consecutive years of double-digit growth, global audiovisual revenues saw a more modest increase of +1.1% in 2024. Total collections reached EUR727m, marking a +32.6% rise over the past decade. Audiovisual's share of global collections edged down slightly to 5.2%, reflecting a small year-on-year decline.

Broadcasting remained the dominant source of audiovisual income in 2024, accounting for two-thirds of the total, despite a slight year-on-year decline. Digital revenues saw significant growth, rising to represent +14.7% of total audiovisual collections. Private copying also continued to provide a valuable source of income, contributing 11% to the total, even with a -10.3% drop compared to 2023.

Europe generated over 90% of global audiovisual revenues in 2024, with collections rising by +3.1% during the year and by more than one-third since 2015. Within the region, Western Europe led growth with a +4.4% increase, while Central and Eastern Europe saw a -7.8% decline. Globally, the fastest-growing audiovisual collections region was Asia-Pacific, up by +9.9%, followed by Africa at +2.6%. Collections in Canada and the USA remained stable, while Latin America experienced a sharp drop of -19.7%.



€727M

in global audiovisual revenues was collected in 2024, representing a +1.1% increase after two years of double-digit growth.

Top ten collecting countries (EUR million)

Country/Territory	Collections	% Growth	vs 2015	vs 2020
France	281	+6.6%	+29.1%	+20.4%
Italy	64	-0.7%	-11.3%	+24.9%
Switzerland	63	+0.2%	+29.5%	+21.4%
Spain	52	+18.6%	+52.2%	+34.0%
Belgium	37	+2.1%	+144.5%	+196.2%
Poland	36	-14.0%	+100.0%	+35.6%
Argentina	24	-46.1%	-46.8%	-15.2%
United Kingdom	22	+9.1%	+33.1%	+59.0%
Netherlands	21	+2.7%	+18.7%	+26.2%
Germany	17	-18.4%	+30.6%	-66.0%
Grand Total	€727M	+1.1%	+32.6%	+21.3%



Broadcast remains cornerstone of audiovisual sector, generating two-thirds of global revenue

In 2024, revenue from TV broadcasts of audiovisual works reached EUR476m, marking a -2.4% decline following a +9.6% rise the previous year. Despite this slowdown and the ongoing shift toward digital, TV broadcast continues to serve as the backbone of the audiovisual repertoire, accounting for two-thirds of total global income.

France maintained its global leadership in broadcast collections, generating 43.2% of the worldwide total. Revenues rose by +5.7%, following the resolution of a longstanding dispute with TV broadcasters, mediated by local society SACD. Belgium also posted a +5.3% increase, with its EUR33.5m total boosted by greater subsidies for public broadcasters.

Among the top 20 markets, Chile recorded the fastest growth, with collections more than doubling year-on-year. Significant gains were also seen in Colombia and Spain, which grew by +80.7% and +54.3% respectively, reflecting major back payments for previously used works. These increases were offset by a -17.3% decline in Poland, following the liquidation of the country's public television, radio and news agency, TVP. Italy, the world's fourth-largest audiovisual market, saw a sharp -30.5% drop due to a contracting TV sector. In Argentina, collections rose by +50% in local currency but fell by more than half in euro terms due to currency depreciation.



Legal reforms fuel positive change in Latin America despite economic headwinds

Audiovisual revenues in Latin America fell by -19.7% in 2024 to EUR51m, accounting for 7% of global audiovisual collections. Over the past decade, the region has contracted by -4.1%, with this year's decline driven largely by inflation and currency volatility, particularly in Argentina.

Argentina, the region's largest collecting market, contributed 47.3% of Latin America's total. However, when converted into euros, collections dropped by -46.1%, distorted by exchange rates and inflation adjustments applied monthly. In local currency terms, however, revenues rose by +67%, supported by new court rulings and retroactive agreements with cable broadcasters.

Mexico also delivered gains, with revenues up +9.9%, fuelled by inflation-linked contracts for TV and digital platforms and a surge in cinema royalties following several box office hits. Over the past decade, the country's audiovisual collections have nearly doubled.

The most promising growth came from countries that have adopted audiovisual remuneration rights for screenwriters and directors. In Chile, collections more than doubled under the continued implementation of the "Ricardo Larraín Law". Colombia outperformed even further, with broadcast collections rising by +80.7% and national revenues increasing 2.5 times. This growth was largely driven by a landmark agreement with the country's first over-the-top (OTT) platform to apply the audiovisual right established under Colombia's "Pepe Sánchez Law".



The most promising growth came from countries that have adopted audiovisual remuneration rights for screenwriters and directors.

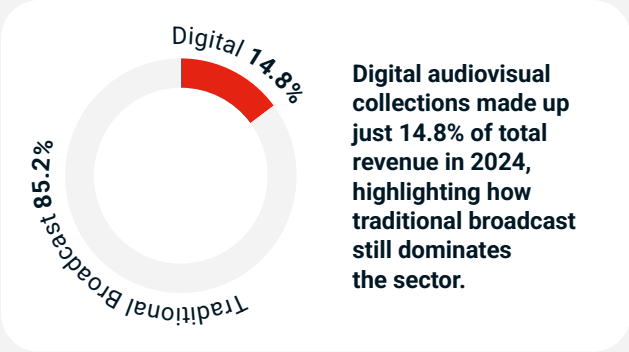
Digital audiovisual revenues rise steadily

Global digital collections for audiovisual works rose by +30.2% in 2024 to reach EUR107m. While this marks a strong upward trend, digital still accounted for just 14.8% of total audiovisual revenue.

Italy made the largest contribution to this growth, more than doubling its collections to EUR27.2m. Its share of global digital revenue climbed from 16% to 25.4%, driven by newly signed agreements with improved terms. Significant back payments were also recovered, with local society SIAE confirming that all major on-demand platforms are now under contract.

France remains the leading digital audiovisual market, accounting for 53.2% of total revenue. The French market expanded by +15.3%, supported by growing demand for Subscription Video On Demand (SVOD) and non-linear TV services, as well as renegotiated contracts that boosted collections from internet providers.

Spain and Poland were the only countries to report a decline in digital audiovisual revenues, although together they accounted for less than 10% of the global total.



Breakdown of collections by type of use (EUR million)

Use category	Collections	% Growth	vs 2015	vs 2020
TV & Radio	476	-2.4%	+15.3%	+16.2%
Digital	107	+30.2%	+1649.0%	+226.3%
Live & Background	25	+7.4%	+31.3%	+96.4%
Educational Use	2	-55.0%	-51.9%	-54.3%
Mechanical Reproduction	0.3	-21.5%	-93.9%	-66.1%
Other	31	+4.8%	+29.8%	+47.2%
Private Copying	80	-10.3%	+6.4%	-30.9%
Rental/Public Lending	3	+508.8%	+268.2%	+248.8%
Reprography	2	+146.8%	+1308.4%	+292.1%
Grand Total	€727M	+1.1%	+32.6%	+21.3%

Private copying revenue falls in all but three countries

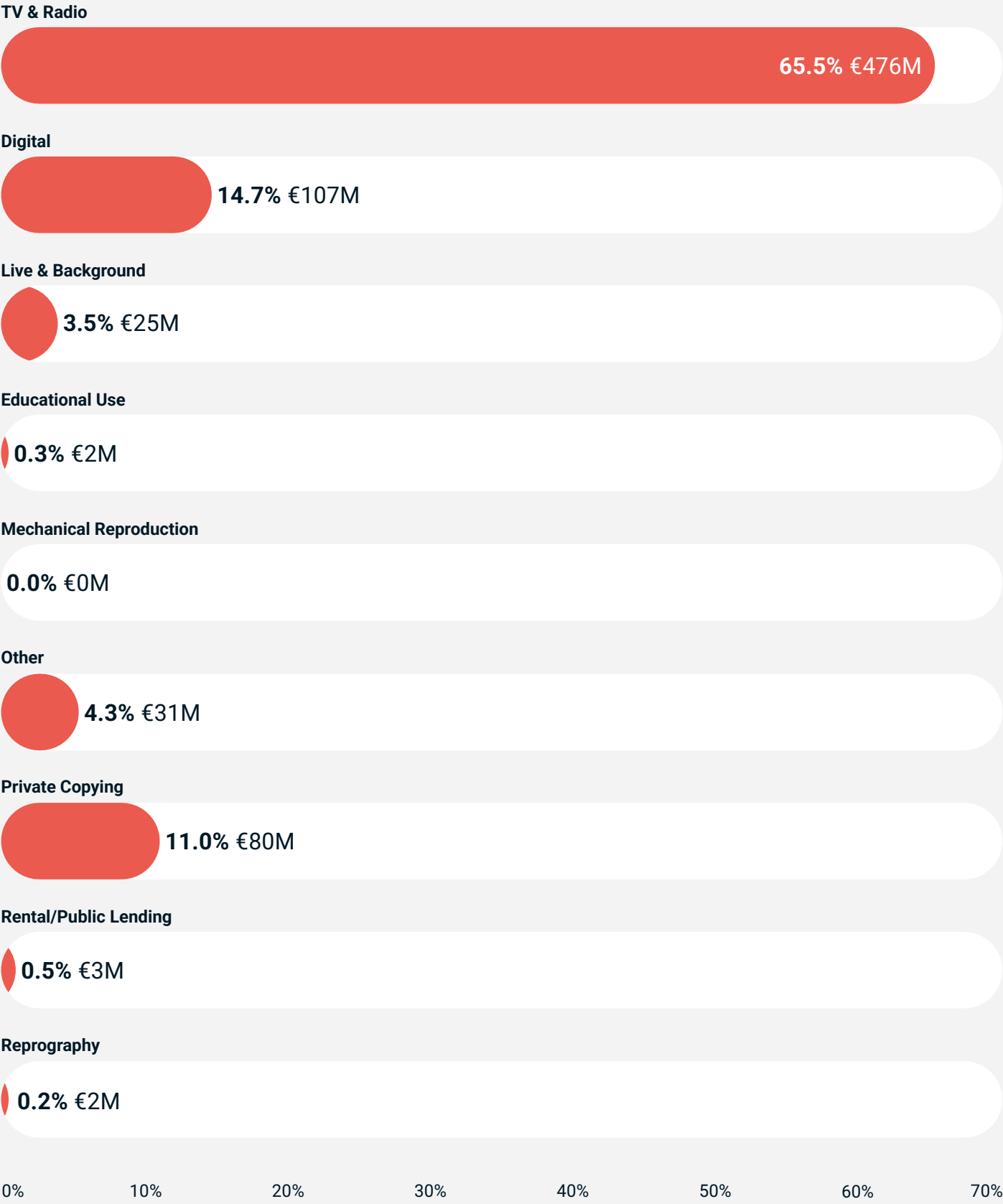
Private copying revenue declined in nearly all reporting countries in 2024, dropping by -10.3% to EUR79.6m. Germany recorded the largest absolute decline, with collections falling by -22.7%. This contributed significantly to the country's -18.4% drop in total audiovisual revenue. The decrease was largely due to a statistical correction following an exceptional +66.2% spike the previous year, driven by a one-off back payment.

Belgium posted the steepest percentage decline at -92.1%, though this was mainly due to the delayed collection of a major 2024 invoice, which was received in early 2025 and thus excluded from the year's totals.

Despite the overall downturn, a few countries recorded growth. Switzerland and Hungary saw increases of +6.7% and +30.2%, respectively. In Romania, revenue resumed after a prolonged legislative dispute stemming from amendments to the national Copyright Law (Law no. 8/1996), which expanded private copying rights to include press editors. Collections had been frozen pending legal clarification, but a 2024 court ruling allowed some royalties to be unfrozen and collected for the first time in years.

Private copying continues to provide an essential source of income for many audiovisual creators, particularly in markets with weaker licensing frameworks or less favourable copyright regimes. The volatility seen in 2024 highlights the sensitivity of this revenue stream to external factors such as legal reform, timing anomalies and retrospective adjustments.

Share of collections by type of use (EUR million)



Collections by repertoire

Visual Arts

Visual arts repertoire returns to growth

Collections for the use of visual artists' work grew by +0.9% to reverse the previous year's -1.4% drop. Revenues reached EUR219m in 2024, a total that represents growth of +20.4% over the past decade.

Visual arts collections saw encouraging gains in 2024, with more than 90% of revenues generated in Europe, where the market grew by +0.6%. Asia-Pacific and Latin America also posted strong double-digit growth, marking a significant turnaround from the previous year's declines across all regions. Collections were reported in fewer than 40 territories, reflecting the sector's reliance on strong regulatory frameworks. Notably, two-thirds of global revenue came from the top five countries, underscoring the concentration of well-established systems in key markets.

Reprography remained the largest revenue stream for visual artists in 2024, accounting for 28.4% of the sector and rising by +5% to EUR62 million.

Reprography remained the largest revenue stream for visual artists in 2024, accounting for 28.4% of the sector and rising by +5% to EUR62 million. These royalties are earned when graphic works are mechanically or digitally reproduced. Germany remained the leading contributor, generating two-fifths of the total following a +3.9% increase. The strongest growth came from Denmark, which surged by +90% to a record EUR6m, while the Netherlands and Belgium also posted gains of over +50%, helping to offset declines in Sweden and the UK. Despite these encouraging results, overall reprography revenue remains -14.3% below 2015 levels.

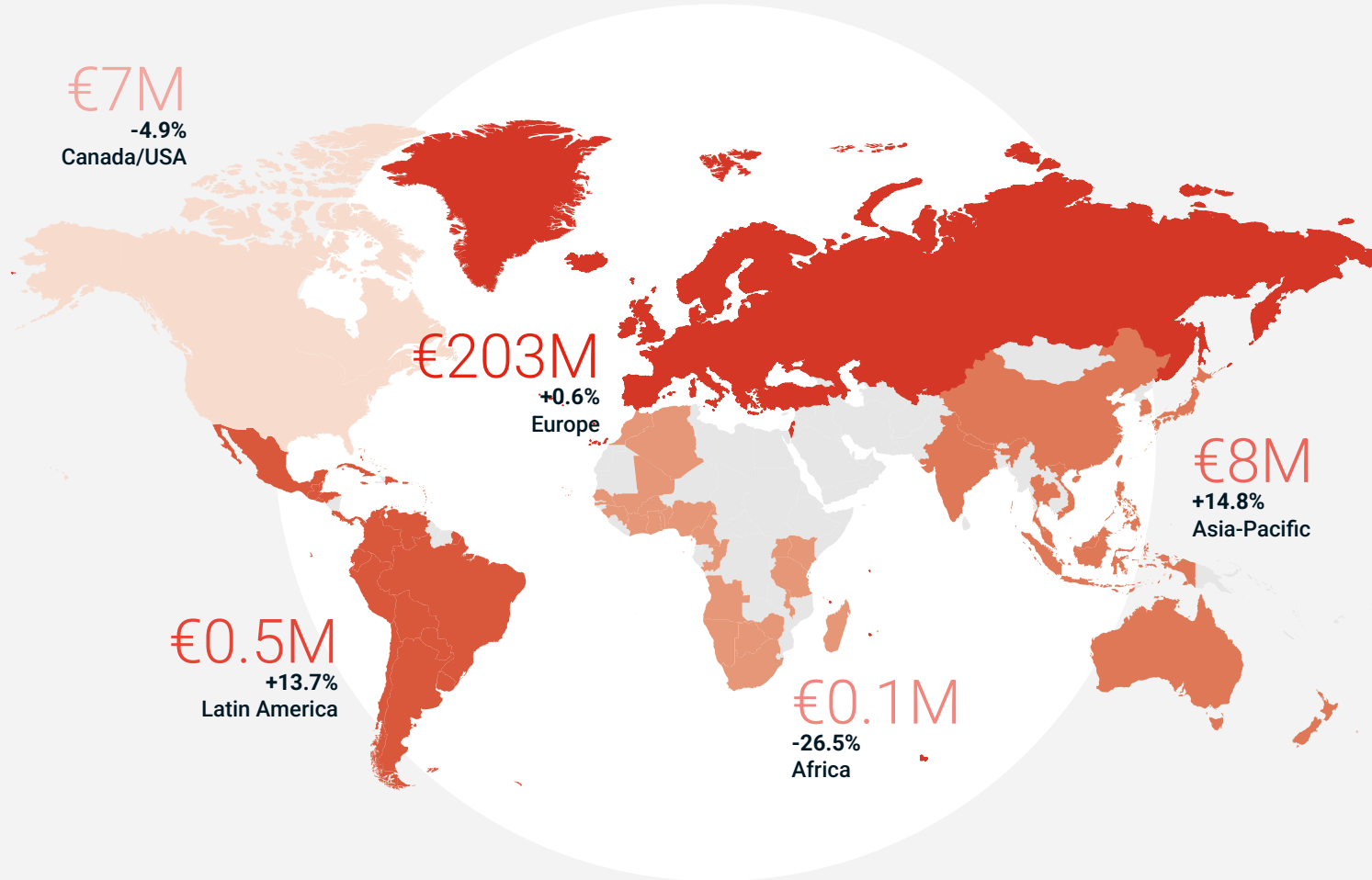
As is often the case with the visual arts repertoire, multi-year back payments can significantly affect annual comparisons and must be viewed in context. For example, private copying revenue declined by -9.2% in 2024 and by -29.2% in 2023, following a sharp increase in 2022 when collections more than doubled.



€219M

was collected for the use of visual artists' work in 2024, marking a +0.9% rise that reversed the previous year's decline.

Visual arts collections by region (EUR million)



Resale right revenues drop but remain critical for visual artists

Income from the artists resale right dropped by -7% but remained the second largest sector at 22.4% of the total. Revenues are generated via a small levy paid to the original artist when their work is resold at auction and the EUR49m collected is a vital source of income for these creators. In the past decade, collections have risen +9.2%.

Resale right royalties, calculated as a percentage of auction sale prices, are closely tied to the performance of the art market. In 2024, fine-art sales at auction fell by more than -25%, bringing the market back to its 2020 pandemic level. Analysts attributed the decline to rising interest rates, geopolitical uncertainty and China's economic slowdown. As a result, resale right collections fell in eight of the top ten countries, with only Belgium and Denmark reporting modest single-digit growth.

A further challenge for this revenue stream is that whilst the legislation to facilitate it has been adopted in more than 100 countries, collections were made in just 23 during the year. Notably, the two largest art markets of USA and China still do not have appropriate legislation. CISAC's work to lobby on behalf of artists continues, with New Zealand and South Korea being the two most recent countries to establish this right.



Even after a 7% drop, resale right royalties remain vital – accounting for 22.4% of global visual arts income.

Top ten collecting countries (EUR million)

Country/Territory	Collections	% Growth	vs 2015	vs 2020
France	49	+2.9%	+81.0%	+14.7%
Germany	39	+2.8%	-40.8%	-21.3%
United Kingdom	24	-18.2%	-13.9%	+22.0%
Sweden	16	-2.4%	+112.1%	+34.0%
Netherlands	14	+4.1%	+62.3%	-20.0%
Italy	12	-0.4%	+23.9%	+41.2%
Denmark	12	+36.3%	+50.6%	+41.8%
Belgium	8	+24.4%	+98.4%	+27.0%
Spain	7	-16.3%	+152.4%	+44.3%
Finland	7	+2.1%	+103.8%	+8.2%
Grand Total	€219M	+0.9%	+20.4%	+10.9%

Top ten collecting countries (EUR million)

Country/Territory	Collections	% Growth	vs 2015	vs 2020
 United Kingdom	14	-10.7%	-22.0%	+15.8%
 France	12	-13.2%	+39.3%	+36.6%
 Italy	8	-5.6%	+4.3%	+45.8%
 Germany	5	-1.5%	+30.1%	+43.0%
 Sweden	2	-15.0%	+43.6%	-0.1%
 Belgium	1	+2.0%	+39.8%	+12.9%
 Denmark	1	+7.8%	+17.5%	+14.3%
 Czechia	1	-11.5%	+160.8%	+41.5%
 Austria	1	-0.6%	+112.6%	+57.7%
 Australia	0.9	-5.8%	+51.4%	+52.6%
Grand Total	€49M	-7.0%	+9.2%	+28.5%

Digital revenues for visual artists grow by +30.8%

Collections for the digital use of visual artists’ work reached EUR14.9m to conclude a more than fourfold increase over the past decade. This was primarily driven by a +58.2% increase in France where more than half of all collections are made. A new licence signed by local society ADAGP with Meta allowed visual artists to receive a royalty when their work was shared on platforms such as Facebook and Instagram in France.

In Germany, digital grew by +2.6% following the initiation of arbitration proceedings against all major social media platforms where negotiations were unsuccessful or rejected. Italy also grew by +43.4% and almost ninefold over the decade.

Breakdown of collections by type of use (EUR million)

Use category	Collections	% Growth	vs 2015	vs 2020
TV & Radio	18	+0.9%	+37.4%	+15.6%
Digital	15	+30.8%	+344.7%	+138.7%
Live & Background	7	+1.5%	+61.3%	+9.5%
Educational Use	11	+7.7%	+2199.8%	+62.4%
Other	2	+19.4%	+1.3%	+312.8%
Private Copying	19	-9.2%	+40.8%	-30.5%
Rental/Public Lending	7	+0.5%	+74.1%	+48.1%
Reproduction	30	-0.9%	+22.8%	+43.2%
Reprography	62	+5.0%	-14.3%	-12.8%
Resale Right	49	-7.0%	+9.2%	+28.5%
Grand Total	€219M	+0.9%	+20.4%	+10.9%



Share of collections by type of use (EUR million)



Collections by repertoire

Drama

Drama revenue softens after two years of growth

Revenues from the dramatic repertoire fell by -3.4% in 2024 to reach EUR208m, although the category still showed a +8.6% increase over the past decade. Having been the fastest-growing repertoire for the previous two years, drama was the only one to record a decline in 2024.

As a primarily live art form centred on physical performances, 88% of collections came from the live & background sector, which declined by -2.8%.

Digital revenues increased by +23.6%, though from an extremely small base. It was the only revenue stream within the dramatic repertoire to grow during the year.

France and Italy remained the leading countries for dramatic collections, with annual growth of +3.2% and +5.9% respectively. Together with Argentina, Spain and Switzerland, these five markets accounted for 85% of the global total.

Top five collecting countries (EUR million)

Country/Territory	Collections	% Growth	vs 2015	vs 2020
 France	69	+3.2%	+14.0%	+142.9%
 Italy	68	+5.9%	+12.9%	+60.4%
 Argentina	14	-51.8%	-11.0%	+1235.4%
 Spain	12	+13.1%	+23.5%	+111.5%
 Switzerland	12	+0.3%	+33.2%	+34.8%
Grand Total	€208M	-3.4%	+8.6%	+100.9%

Drama live & background revenues led by France & Italy

France recorded strong live performance revenues, with a +3.2% increase bringing total income to EUR69m.

Dramatic collections from live & background in Italy grew by +10.8% in 2024, reaching a record high of EUR50.9m. This marked the third consecutive year of exceptional growth for Italian dramatic performance, a sector that had been especially hard hit by lockdown restrictions during the pandemic.

The fastest growth, however, came from smaller collecting markets. Lithuania grew by one-third, Luxembourg and Uzbekistan by nearly two-thirds, while Colombia rose by +86.1%. In Algeria, revenues increased nearly fourfold, reflecting renewed enthusiasm for onstage cultural performances these five markets accounted for 85% of the global total.



-3.4%
decline in 2024
brought dramatic
repertoire revenues
down to €208M.

Africa's top drama market sees regional revenues rise +18.2%

While Europe and Latin America continue to dominate the global drama market, Africa was the fastest growing region in 2024. From a very small base, regional drama revenues increased by +18.2%, with growth reported in all but two collecting markets.

Algeria rose from third place in 2023 to become Africa's largest market for drama, driven by strong gains in live and broadcast performance and a more than +50% increase in private copying revenues. These factors combined to deliver overall growth of +56%. South Africa overtook Côte d'Ivoire for second place, with increases of +24.1% and +13% respectively. In Mali, dramatic revenues doubled year-on-year.

Despite these encouraging gains, the African drama sector remains far from any kind of pandemic recovery, with regional revenues still nearly two-thirds below 2015 levels.

Italy anchors dramatic broadcast revenues amid mixed global results

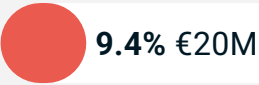
Italy, which accounted for nearly three-quarters of all dramatic broadcast revenue in 2024, saw a modest increase of +1.2% to reach EUR14.7 million. The country's steady performance helped stabilise the sector, even as total global dramatic broadcast revenues declined by -2.3% due to the reclassification of Luxembourg's drama income into the audiovisual repertoire. Elsewhere, Algeria reported a +27.5% rise in broadcast income, driven by growing demand for local dramatic works, while Latvia posted an impressive +80.1% increase.

Breakdown of collections by type of use (EUR million)

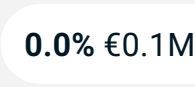
Use category	Collections	% Growth	vs 2015	vs 2020
TV & Radio	20	-2.3%	-5.5%	+5.6%
Digital	0.1	+23.6%	+168.0%	-75.6%
Live & Background	182	-2.8%	+9.4%	+131.0%
Other	1.2	-6.8%	+82.1%	+33.8%
Private Copying	4	-21.3%	+71.4%	-1.5%
Rental/Public Lending	0.5	-35.0%	+4.7%	-23.2%
Reproduction	0.0	-82.6%	-	-
Grand Total	€208M	-3.4%	+8.6%	+100.9%

Share of collections by type of use (EUR million)

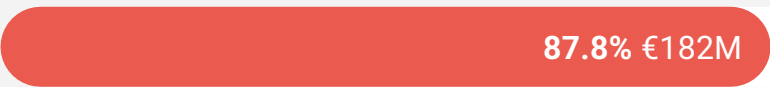
TV & Radio



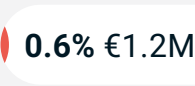
Digital



Live & Background



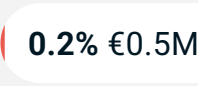
Other



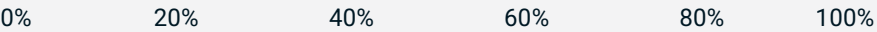
Private Copying



Rental/Public Lending



Reproduction



Literature

Literary revenue growth accelerates

Revenues in the literary repertoire grew by +7.3% to reach EUR231m, an increase of almost one-quarter over the past decade. 63.1% of this total was collected in Europe, which grew by +7.3%. Countries in Central and Eastern Europe increased three times faster than their western neighbours, rising by +21.5%. Among the eight Eastern European literary collecting countries, only Latvia saw a decline in revenue—down -5.6%, with the majority of that drop driven by a sharp fall in cable broadcast collections.

While Asia-Pacific contributed one-third of global collections, the most dramatic growth came from Africa, which recorded a +90.8% surge. However, this strong regional figure masked significant disparities. Morocco accounted for the majority of growth, with reprography collections reaching EUR4m, boosting its share of African collections from just 1.4% to nearly 50%. In contrast, other countries in the region showed far less momentum. Mali, notably, saw revenues collapse by -83.3%, impacted by rising digital consumption and persistent piracy through illegal reprography.

This uneven performance highlights the differing levels of infrastructure, enforcement and collection mechanisms across the African continent.

The top five collecting countries accounted for three-quarters of global literary repertoire revenues, with their combined total rising by +4.7% in 2024. Australia remained the largest contributor at 30.7%, but its modest +1.3% growth and a ten-year decline of -19.4% have steadily eroded its global share. In contrast, Switzerland expanded by one-third, adding EUR6m to the global total, while France grew by +26.6%, driven primarily by strong private copying performance. Belgium recorded the highest growth at +43.9%, fuelled by reprography and educational use royalties, marking a sevenfold increase since 2015. These shifting patterns highlight a growing momentum in emerging markets, offering a strong foundation for expanding the global footprint of literary repertoire collections.



€231M

in literary repertoire
revenues were
collected in 2024,
reflecting **+7.3%**
growth and nearly a
25% increase over
the past decade.

Swiss reprography collections exceed EUR20m, underscoring sector opportunity

Reprography remained the dominant source of income for literary authors in 2024, accounting for nearly three-quarters of total collections and growing by +7.9% to EUR174m, a +10.2% increase over the past decade. While Australia contributed two-fifths of global revenue with steady growth (+1.3%), the standout performer was Switzerland, which rose by +33.8%, surpassing EUR20m for the first time.

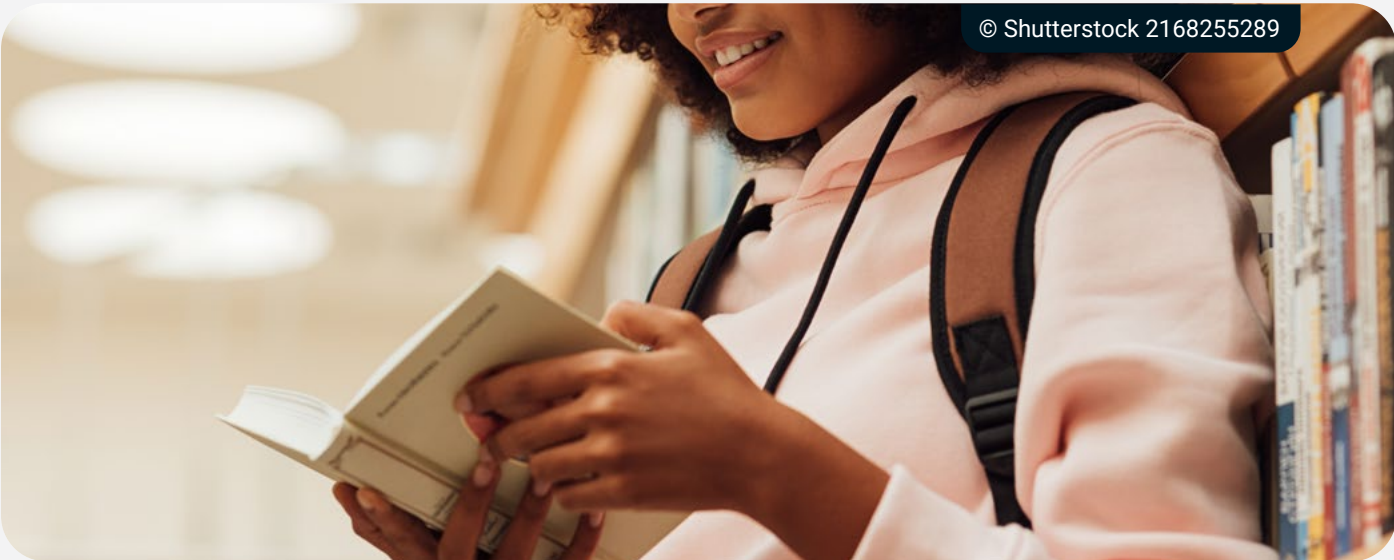
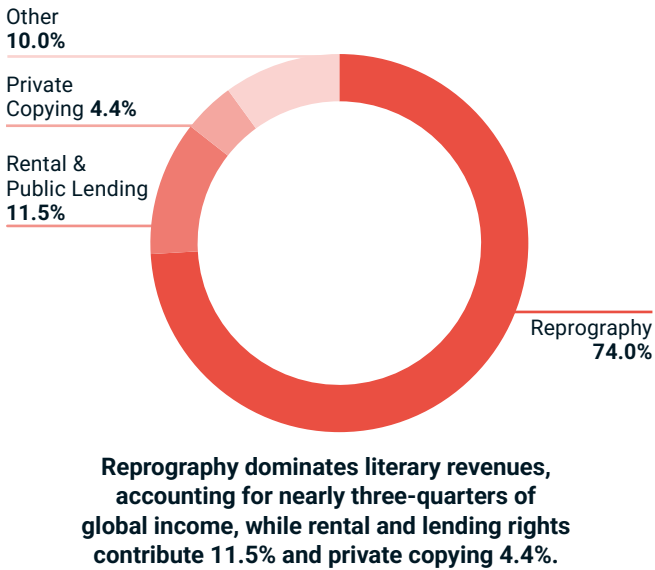
This sustained growth highlights the untapped potential in reprography, especially in markets with strong regulatory frameworks. As demand for printed educational and institutional materials remains high, expanding and reinforcing reprography systems offers a clear path to increased and more equitable remuneration for literary creators worldwide.

Rental and public lending rebounds

Revenues from rental and public lending rights rose by +7.6% in 2024, reversing the -8.8% decline seen the previous year. This category accounted for 11.5% of total literary income. Finland remained the dominant contributor, generating nearly half of all global revenue in this sector. Its collections increased by +2.4%, bringing its total to nearly double the 2015 level. The Netherlands posted modest growth of +2.4%, while Italy experienced a -5% decline. Czechia stood out by more than tripling its collections, following the introduction of a new public lending right for publishers and a renewed agreement with the national library to support digital document delivery. Together, these changes added over EUR1m to global revenues. The overall trend highlights significant untapped potential in this area, particularly when supported by legislative updates and institutional cooperation.

Private copying growth anchored by France

Private copying collections, generated from levies on devices and recordable media, accounted for 4.4% of total literary revenues. Although this represented a -14.2% drop from the previous year, the decline followed exceptional growth in 2023, when revenues nearly tripled. France led this category, contributing half of the EUR10m total and posting a +27.3% increase. However, declines were recorded in the Netherlands and Italy, both of which had benefited from exceptional one-time back payments the previous year. Despite annual fluctuations, private copying remains a vital revenue stream. Its potential is especially strong in countries where the framework is underdeveloped, offering clear opportunities for future growth through policy and enforcement improvements.



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Top five collecting countries (EUR million)

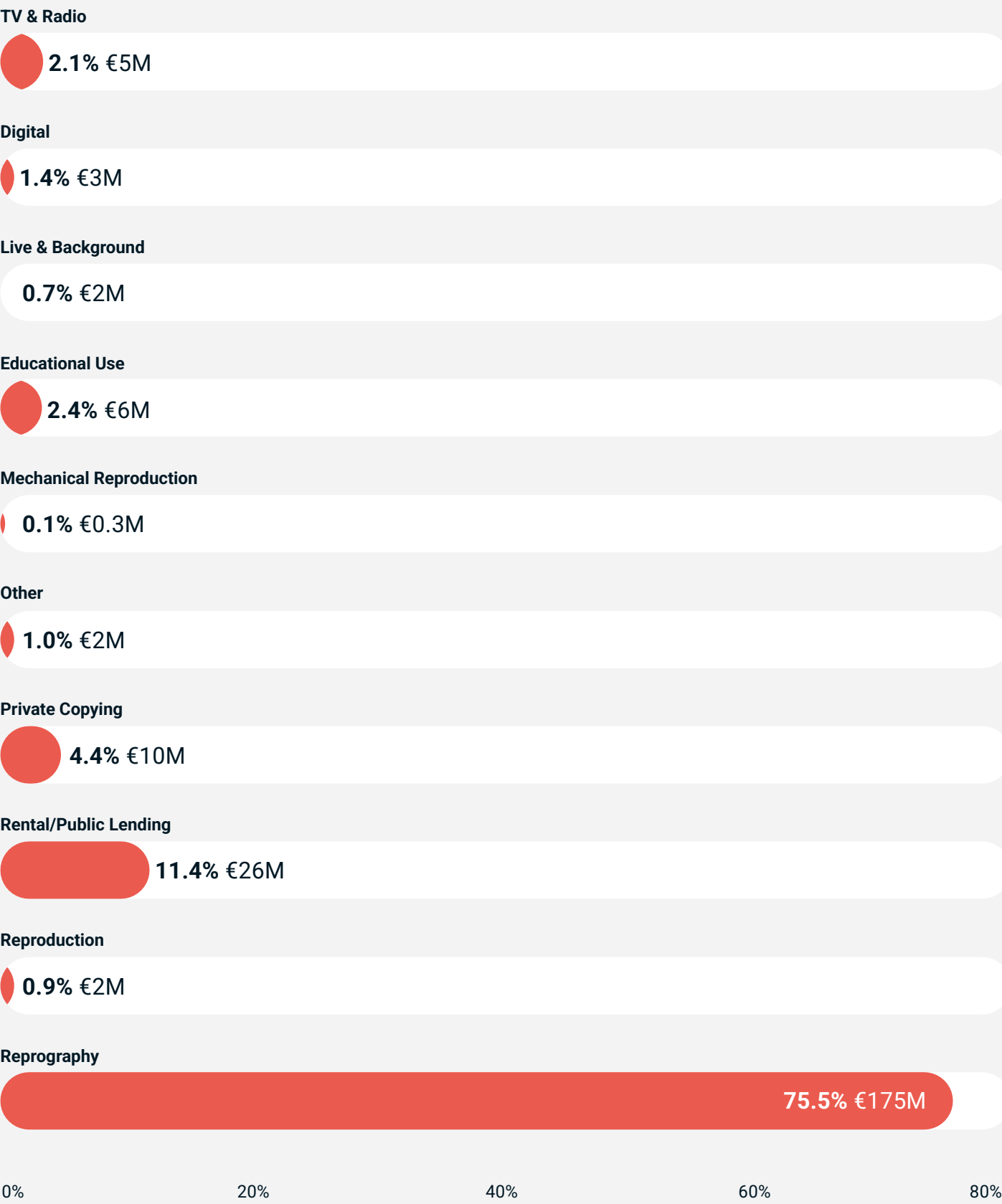
Country/Territory	Collections	% Growth	vs 2015	vs 2020
 Australia	71	+1.3%	-19.4%	-12.3%
 United Kingdom	38	+3.7%	+39.3%	+36.6%
 Switzerland	25	+33.8%	+64.9%	+41.9%
 Finland	21	+2.4%	+40.0%	+0.6%
 Netherlands	18	-8.3%	+173.1%	-21.5%
Grand Total	€231M	+7.3%	+25.6%	+11.5%

Breakdown of collections by type of use (EUR million)

Use category	Collections	% Growth	vs 2015	vs 2020
TV & Radio	5	+3.3%	+24.3%	+31.7%
Digital	3	+3.0%	+929.5%	+28.8%
Live & Background	2	+3.9%	-5.7%	+40.7%
Educational Use	6	+22.8%	-	+34.8%
Mechanical Reproduction	0.3	+604.5%	-79.2%	-74.3%
Other	2	+32.0%	+125.5%	+127.4%
Private Copying	10	-14.2%	+372.4%	+117.4%
Rental/Public Lending	26	+7.6%	+77.5%	+30.1%
Reproduction	2	+29.0%	-	-
Reprography	175	+7.9%	+10.2%	+3.6%
Grand Total	€231M	+7.3%	+25.6%	+11.5%

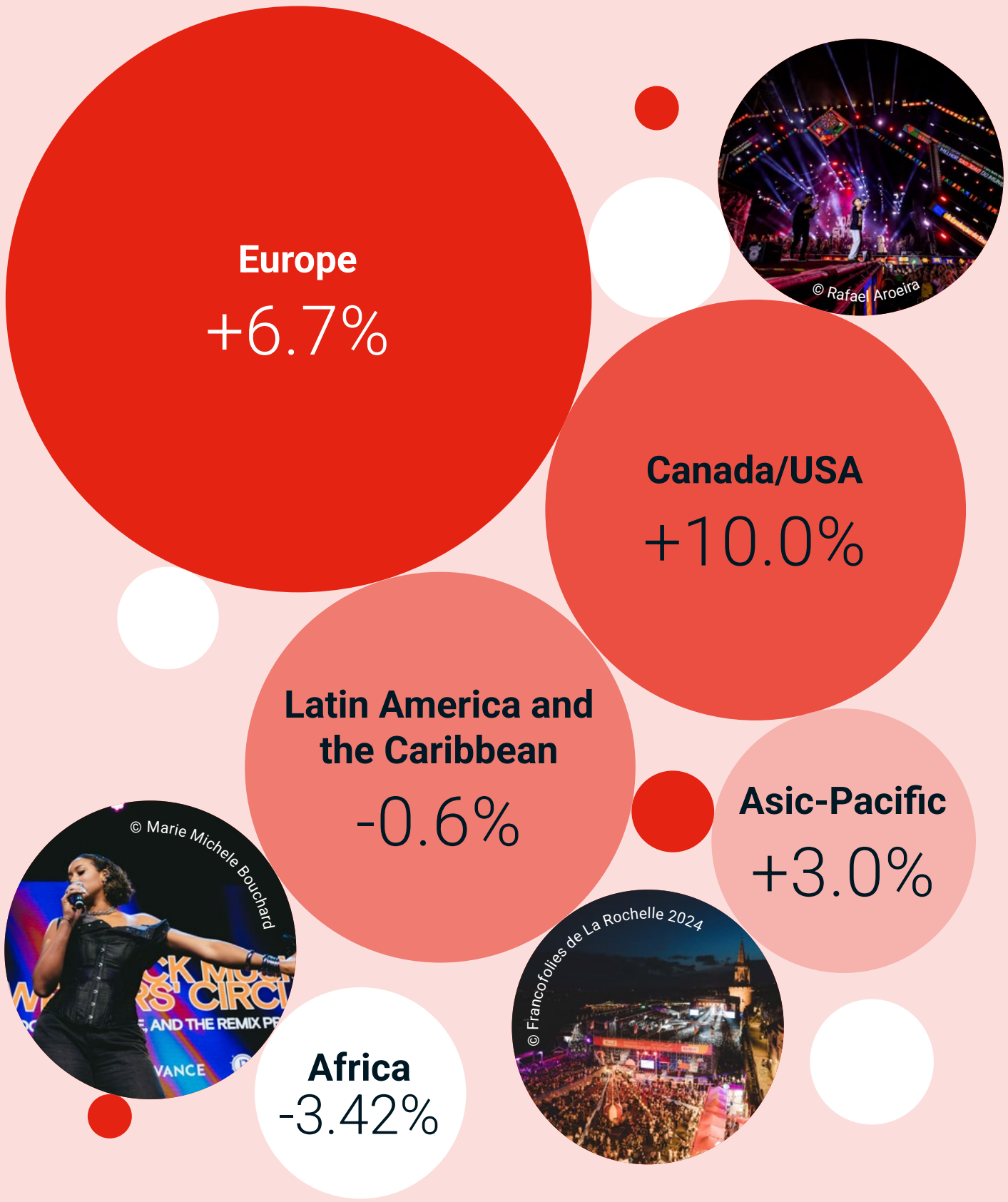


Share of collections by type of use (EUR million)



2024

Collections by region



Collections by region

Europe

Digital and Live & Background see double-digit growth

Collections on behalf of creators in Europe grew by +6.7% during the year to reach a record EUR7.7bn. Most of the growth was driven by parallel double-digit increases in digital and live & background revenues which helped stretch the region's global share to 54.8%.

Across Europe, 89% of countries (42 out of 47) reported royalty increases, and over the past decade over half of them recorded growth exceeding +50%. France, UK and Germany remained the largest markets in 2024, comprising 55.5% of the region's total, and, for the second year in succession, each saw collections exceed EUR1bn.

Italy, Spain, the Netherlands, Switzerland, Sweden, Belgium and Denmark contributed more than EUR410m to global growth.

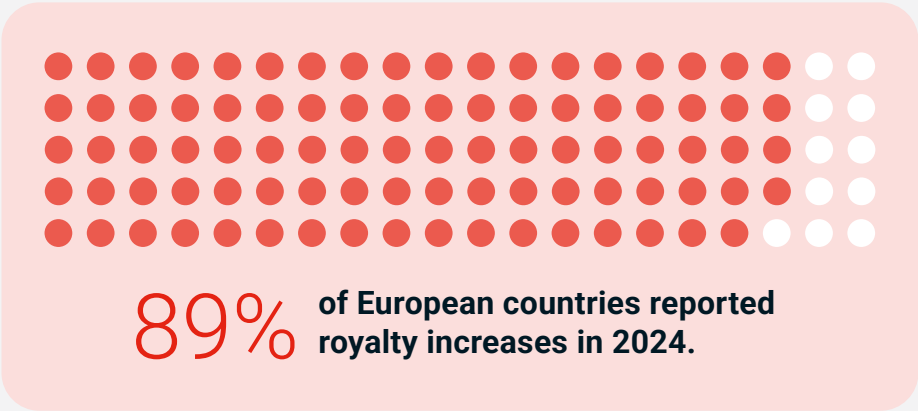
Of the three major revenue streams—live & background, digital and broadcast—the latter remained stable at +1.5%, although Eastern Europe saw a larger increase at +8%. Digital growth stayed in double digits at +10% whilst live & background collections rose by +10.1%. Together these three usages made up 88.7% of the total market in Europe.

€7.7B

was collected on behalf of creators in Europe in 2024, a +6.7% increase.

Collections by repertoire, Europe (EUR million)

Repertoire	Collections	% Growth	vs 2015	vs 2020
 Music	6,445	+7.3%	+63.9%	+64.8%
 Audiovisual	671	+3.1%	+36.1%	+19.4%
 Literary	146	+7.2%	+60.2%	+22.4%
 Drama	190	+4.5%	+11.3%	+87.6%
 Visual Arts	203	+0.6%	+18.1%	+8.4%
Grand Total	€7,656M	+6.7%	+57.5%	+56.8%





All repertoires see growth in Europe, led by music at +7.3%

Collections across every repertoire grew in 2024 in Europe, with the music sector rising fastest at +7.3%. Audiovisual also performed well with a +3.1% increase. This was driven by a near doubling of broadcast revenues in Belgium and by the resolution of a TV broadcaster dispute in France that delivered a +5.7% national rise. Literature growth slowed from an exceptional +10.4% in 2023, but remained strong with a +5.9% rise led by substantial Swiss reprography collections.

The dramatic repertoire increased by +4.5% with the live & background sector returning to more expected levels of growth following two years of exceptional performance as it recovered from pandemic lockdown restrictions. In France, a +58.2% rise in digital visual arts collections helped to reverse a -0.9% drop in 2023 and achieve a +0.6% increase across the region.

Central and Eastern European growth outpaces Western Europe

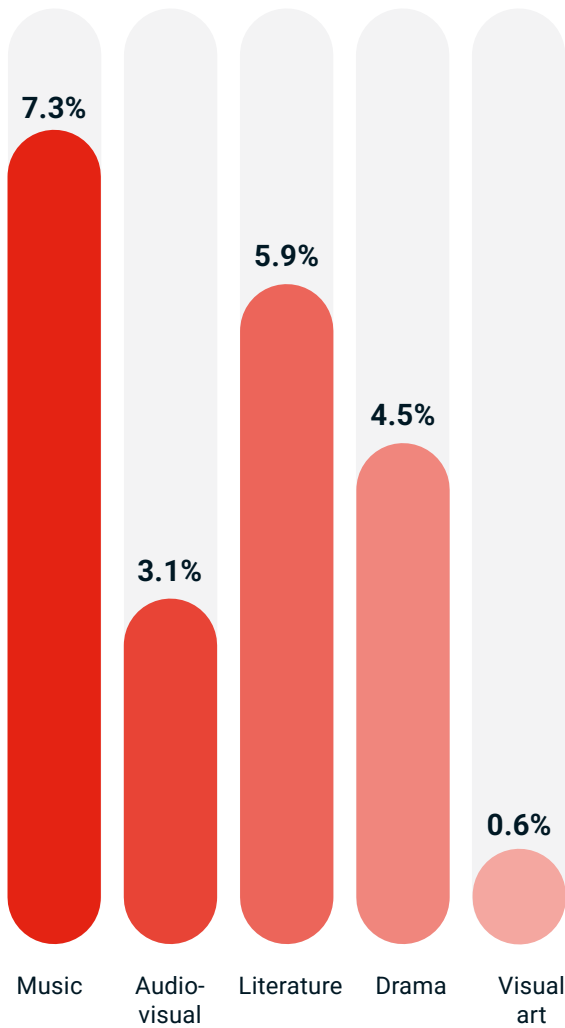
Collections in the 27 countries that comprise Central and Eastern Europe grew faster than Western Europe in 2024, rising by +12% to reach a total that was more than +50% larger than the 2015 figure. Music performed exceptionally well, growing by +17.9% with increases in 24 of the 26 countries. Literature also grew by +17%. The only repertoire to see a decline was audiovisual, which fell -7.8% following four successive years of growth. Broadcast and live & background revenues made up more than three-quarters of the region's total.

The fastest growing country in Europe (by percentage terms and starting from a very low base) was Ukraine where an active public awareness campaign, combined with new digital contracts and improved radio and live events licensing, provided a near fourfold increase in revenues.

Türkiye contributed most to regional growth with a joint licensing and distribution agreement between CISAC's two music members, MSG and MESAM, driving a fruitful +49% increase in 2024. Digital remained the country's primary source of income and has risen more than fivefold over the past decade.

Slovenia saw a rise of +52.3%, driven predominantly by the resolution of several long-standing cases against cable operators in the broadcast sector. Romania also performed well, rising +23.6%, whilst Hungary grew +16.5%. Poland constituted more than one-quarter of the region and grew +4.5% with local society ZAiKS exceeding EUR100m in royalties for the second consecutive year.

Growth by repertoire, Europe 2024



All repertoires in Europe grew in 2024, led by music at +7.3%.

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

Repertoire	Collections	% Growth	vs 2015	vs 2020
 Music	471	+17.9%	+55.7%	+60.9%
 Audiovisual	64	-7.8%	+106.8%	+25.8%
 Drama	16	+2.4%	-36.5%	+51.8%
 Literary	10	+21.5%	+81.3%	+46.1%
 Visual Arts	4	+3.4%	+152.0%	+43.6%
Grand Total	€566M	+13.8%	+54.4%	+55.3%

Digital royalties surge sevenfold over the decade

Revenues from the digital use of creators' work grew by +10% in 2024 to realise a sevenfold rise since 2015. This sector now makes up 29.7% of the European total. In France, digital grew +12.7%, adding EUR80m to the national total and was the main driver for the country's +7.5% increase. In the UK, digital rose by +7.9% with local society PRS for Music reporting 60 major new and improved licences across broadcast and digital including Apple TV, Discovery+, Pluto TV and Paramount+. Similar licence renegotiations in Italy combined with streaming market growth to deliver a digital increase of +37.7%, whilst in Spain, the sector rose by +23.3% and elevenfold over the past decade. The only major territory to challenge the rising trend was Germany, where digital flattened slightly with a +1.2% rise compared to +2.2% the previous year.

Digital royalties in Europe's top five countries (EUR million)

Country/Territory	Collections	% Growth	vs 2015	vs 2020
 France	716	+12.7%	+1471.6%	+112.4%
 United Kingdom	587	+7.9%	+510.7%	+119.9%
 Germany	313	+1.2%	+608.9%	+77.1%
 Italy	137	+37.7%	+715.2%	+184.4%
 Spain		+2.4%	+40.0%	+0.6%
 Netherlands	68	+23.3%	+1019.7%	+163.4%
Grand Total	€2,271M	+9.8%	+627.3%	+112.0%

29.7%

of Europe's total royalties now come from digital, which has risen sevenfold since 2015 and grew by +10% in 2024.





Broadcast returns to growth

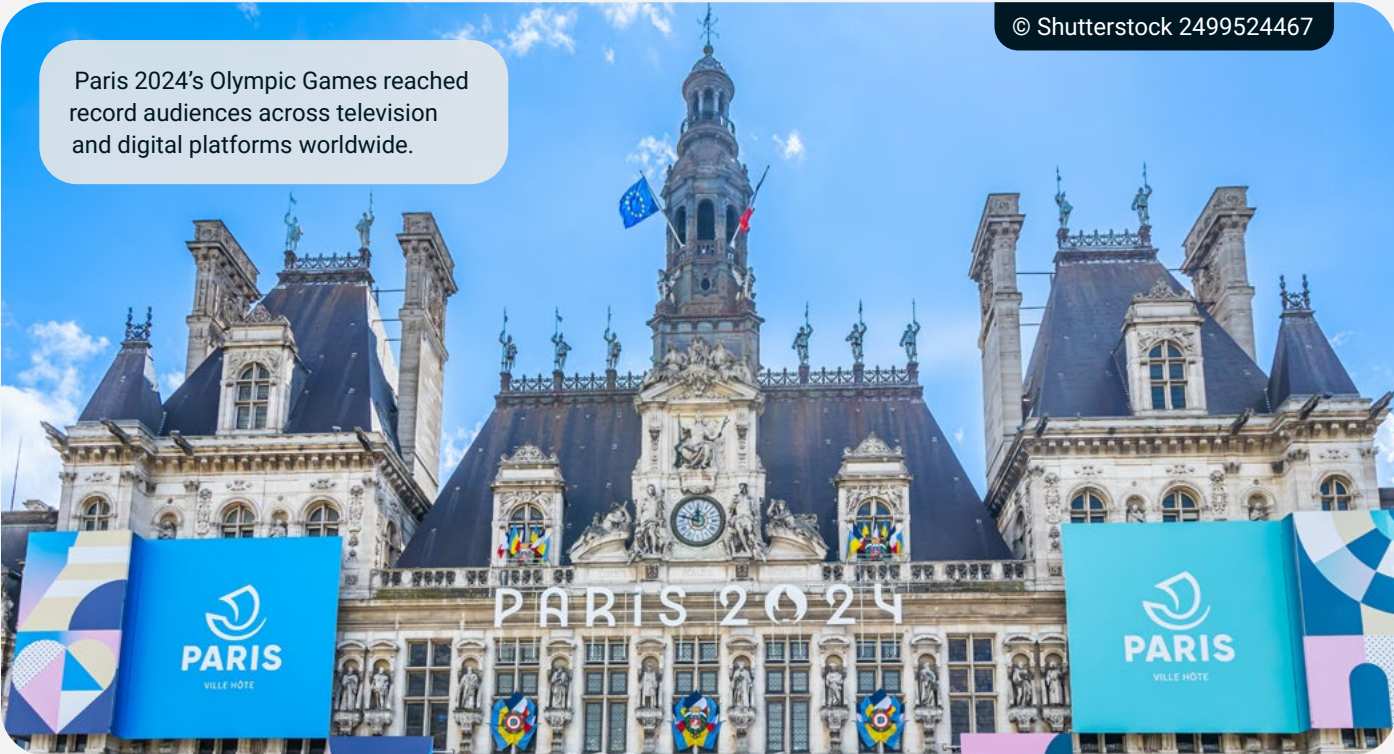
Collections from TV & radio in Europe grew by +1.5%, reversing the previous year's -3.8% decline. The largest contributor to this was Spain, where a +20.3% rise in revenues was bolstered by the collection of late payments from regional TV stations.

France remained the largest broadcast market and grew by +3.9% due to a rise in the number of radio stations on FM and local networks, growth in the catch-up TV market, and contract negotiations that helped deliver a back payment. In Belgium, a +19.4% broadcast increase was driven by higher subsidies for public broadcasters and greater use of the music repertoire. Revenues in Slovenia near doubled.

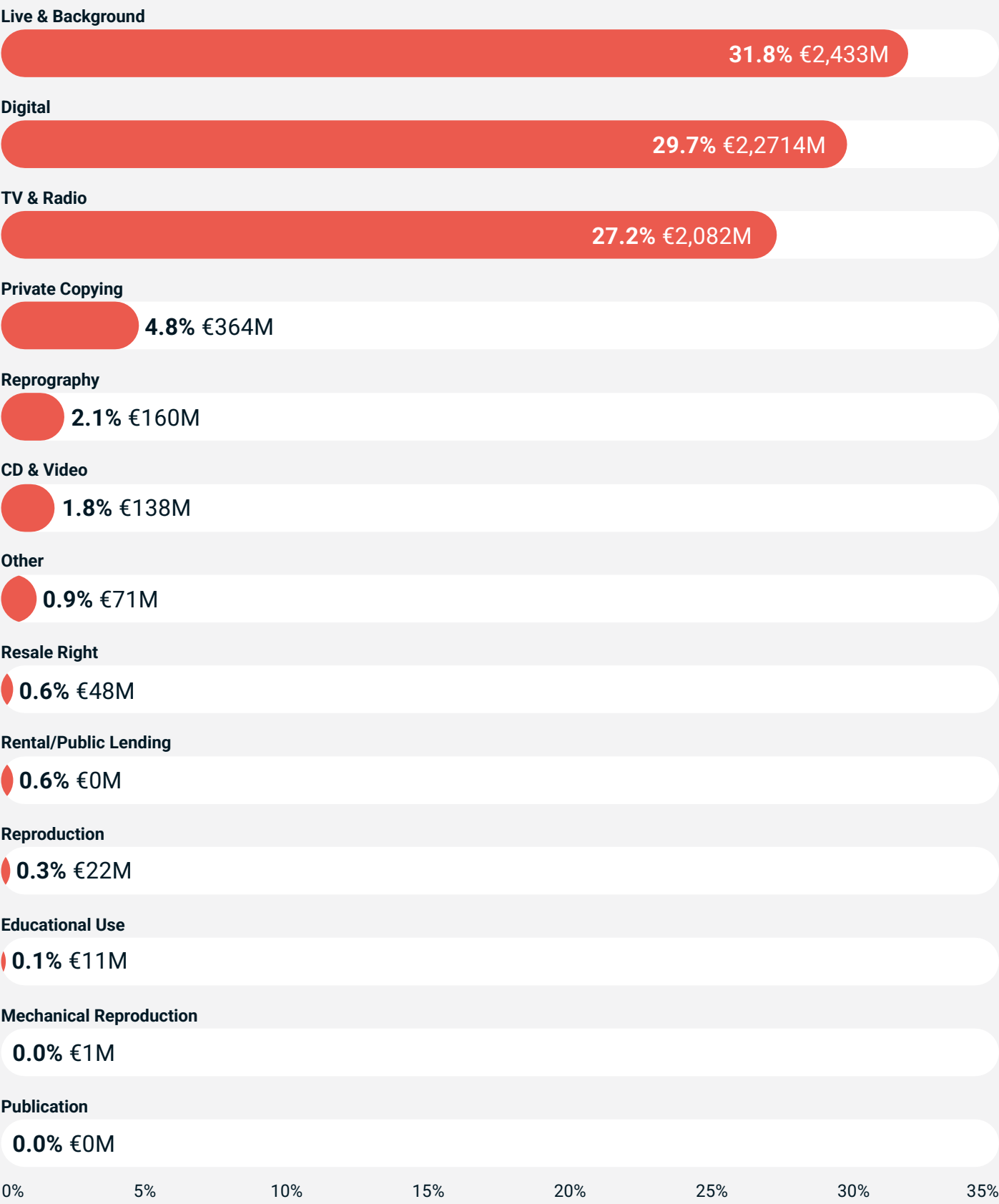
Broadcast also returned to growth in Germany, but the +1.5% rise was impacted by a new German law that prohibited landlords from passing cable TV fees onto tenants. Passed in July 2024, this caused a decline in cable coverage as tenants became free to cancel or switch their TV subscriptions to digital alternatives.

Breakdown of collections by type of use (EUR million)

Use category	Collections	% Growth	vs 2015	vs 2020
Live & Background	2,433	+10.1%	+36.3%	+143.0%
Digital	2,271	+9.8%	+627.3%	+112.0%
TV & Radio	2,082	+1.5%	+6.2%	+8.3%
Private Copying	364	-6.7%	+37.2%	-21.3%
Reprography	160	+7.9%	+14.2%	+1.8%
CD & Video	138	+13.8%	-42.7%	+12.1%
Other	71	+45.7%	+38.6%	+98.6%
Resale Right	48	-6.9%	+8.4%	+28.0%
Rental/Public Lending	43	+13.3%	+73.6%	+38.5%
Reproduction	22	+4.0%	+40.1%	+59.4%
Synchronisation	13	-18.5%	+37.4%	+1.5%
Educational Use	11	-15.0%	+106.8%	+10.9%
Mechanical Reproduction	1	+39.4%	-90.7%	-71.6%
Grand Total	€7,656M	+6.7%	+57.6%	+56.8%



Share of collections by type of use (EUR million)





Collections by region

Canada/USA

North American collections double over decade

The Canada/USA region, the second largest in the world in terms of collections, grew by 10% to post record revenue of EUR3.5bn in 2024. This total was double the 2015 level and concluded a period where income had risen in every year except 2020.

Both the US and Canada appeared in the list of top ten collecting countries with revenues of EUR3.1bn and EUR371m respectively. Combined, the region made up more than one-quarter of the global total. Music represented close to 100% of regional income with less than EUR10m generated by the audiovisual, drama and visual arts repertoires.

Digital collections drive two-thirds of region's growth

For the second year in succession, income from the digital use of creators' works was the largest revenue stream in Canada/USA, accounting for 45.1% of collections. The total rose by +14% during the year to reach a record EUR1.6bn. This represented an eight-fold increase over the previous decade and digital contributed almost two-thirds of the region's growth during the year. Additionally, collecting societies in the region have sustained their efforts to license digital platforms, particularly newcomers.

The revenue gap between digital and broadcast, the second largest source of income, has widened year on year. While only EUR123m separated the two streams of revenue in 2023, the gap increased to EUR285m in 2024.



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€3.5B

was collected in 2024 by Canada and the USA, a record total that was up +10% year-on-year and double the 2015 figure.

Broadcast income returns to growth

Collections from radio and TV broadcasting grew by +2.6% in 2024 to reach EUR1.3bn. This increase reversed the -2.7% drop recorded in 2023 and was indicative of a good year for radio advertising revenues. Whilst this income stream rose by +14.5% over the decade, its share of the overall total has continued to decrease year on year. In 2015, broadcast made up almost two-thirds of regional income, whilst in 2024, this figure had fallen to 37%.

Live and background was the third largest income stream and grew by +15.7%, thanks in part to the strong performance of the live music sector, with record-breaking concert tours fuelling the surge. The EUR537m total also represented growth in the sector's market share, from 14.5% in 2023 to 15.3% in 2024, and a total increase of +72.1% over the decade.

Revenues from synchronisation and CD & Video accounted for EUR36m and EUR35m respectively, or 1% each of the regional total. Revenue from reproduction rights fell by -4.7% to reach EUR7m but remains the main source of income for the visual arts repertoire.

Record revenues in the region

In the US, the single largest market in the world, local society ASCAP collected record revenue of EUR1.29bn domestically in 2024, up +7% compared to the previous year.

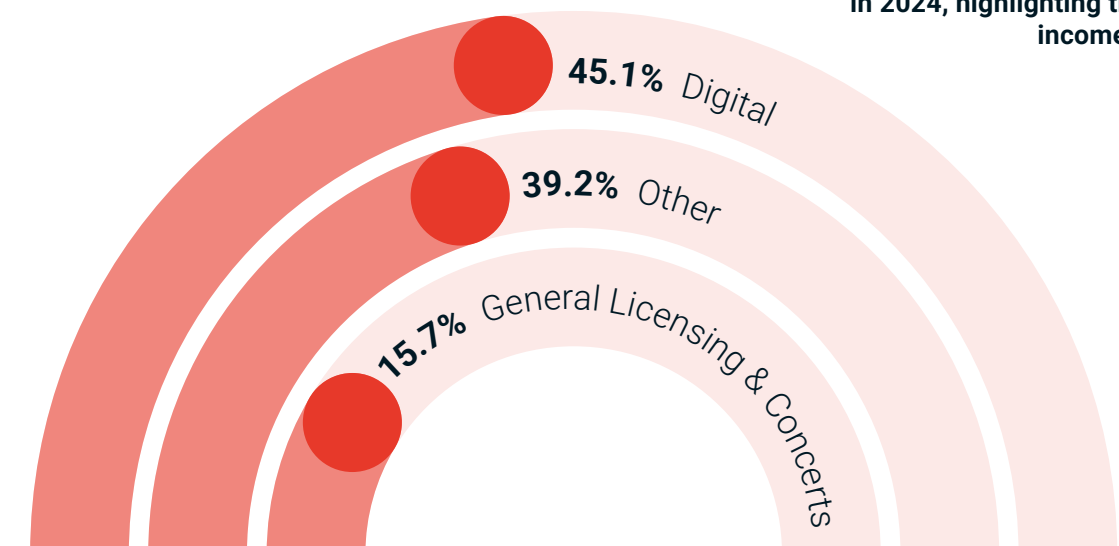
In Canada, music rights society SOCAN posted total annual revenue of EUR284.5m, up +2.8% from 2023. Digital revenue grew by +14% in 2024 and accounted for 45.1% of total collections. General licensing and concerts grew by +15.7%.

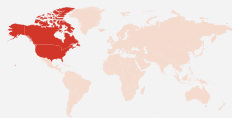
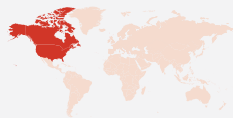
The Toronto-based society pointed out, however, that these positive results did not fully benefit Canadian songwriters, as data has indicated that less than 10% of music consumed online in Canada was written or composed by Canadians, further making the case that improved signposting in online platforms could help drive greater visibility and consumption of Canadian works.

Figures for the North American region include US PROs such as ASCAP, BMI, SESAC and AMRA, as well as visual arts organisation ARS, while Canadian data includes societies such as SOCAN and CMRRA, as well as CARCC (visual arts) and CSCS (audiovisual). Data from The Mechanical Licensing Collective (The MLC), which collects mechanical royalties in the US, are not accounted for in this report but will be included in next year's figures. The MLC was announced as a new member of CISAC in 2024.

Collections income, Canada

Digital accounted for 45% of Canada's total music collections in 2024, highlighting the shift in income sources.





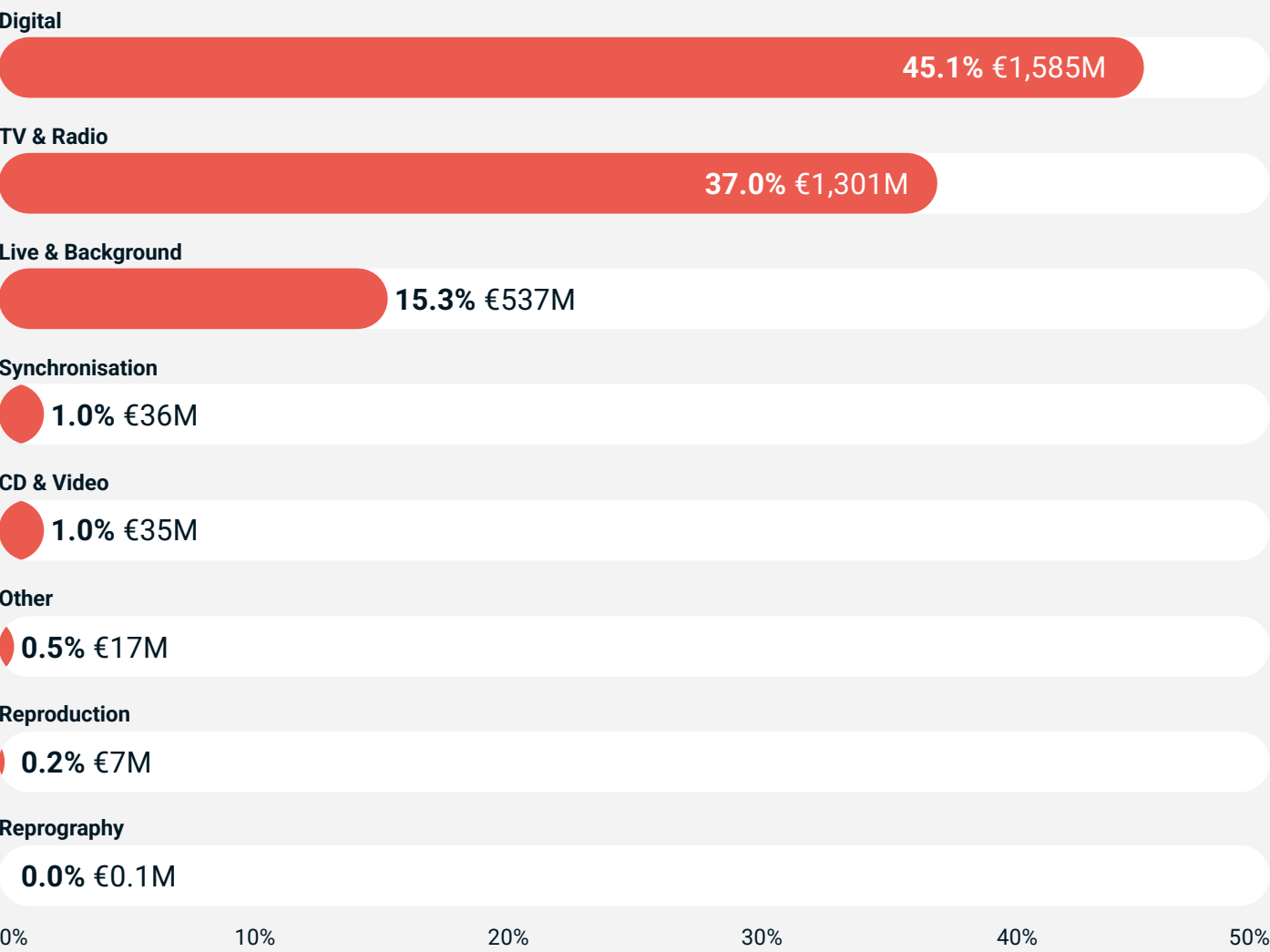
Collections by repertoire (EUR million)

Repertoire	Collections	% Growth	vs 2015	vs 2020
 Music	3,509	+10.0%	+99.9%	+64.8%
 Audiovisual	2	+0.0%	+2608.4%	+4777.0%
 Drama	0.2	-7.2%	-	-
 Visual Arts	7	-4.9%	+3.1%	+24.7%
Grand Total	€3,518M	+10.0%	+99.7%	+61.5%

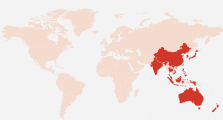
Breakdown of collections by type of use (EUR million)

Use category	Collections	% Growth	vs 2015	vs 2020
TV & Radio	1,301	+2.6%	+14.5%	+8.4%
Digital	1,585	+14.0%	+708.2%	+130.8%
Live & Background	537	+15.7%	+72.1%	+120.7%
CD & Video	35	+2.8%	-64.8%	-9.7%
Other	16.9	+15.1%	+525.8%	+1625.2%
Private Copying				
Reproduction	7	-4.7%	+7.0%	+25.0%
Reprography	0.1	-8.8%	-29.7%	-8.3%
Resale Right				
Synchronisation	36	+71.6%	+413.2%	+1211.2%
Grand Total	€3,518M	+10.0%	+99.7%	+61.5%

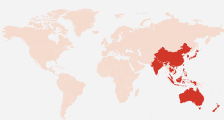
Share of collections by type of use (EUR million)



Collections by region



Asia-Pacific



Asia-Pacific leads the world in digital collections

Adjusted for currency fluctuations, collections in Asia-Pacific grew by +2.9% in 2024 to reach EUR1.9bn. This marks a +50% increase over the past decade, with the region now accounting for 13.8% of the global total.

As in previous years, exchange rate variations affected reported figures. For example, Japan fell by -1.1% in euro terms but recorded a +6.7% increase in local currency. Despite this, Japan remained the region's largest market, contributing 46.1% of the total. Alongside Australasia and South Korea, the top three markets accounted for over four-fifths of all regional income. While music generated the majority of collections, all repertoires recorded growth in 2024. Visual arts grew the fastest at +14.8%, driven by rapid expansion in China's reprography market.

Asia-Pacific continues to lead globally in digital collections, with digital accounting for 49% of regional income. In 2024, digital revenues rose by +10.4% to reach EUR941m, a nearly fivefold increase over the decade. Live & background income grew by +6.1%, while broadcast fell by -3.5%, causing the two revenue streams to switch places in the regional ranking. Meanwhile, physical formats continued their decline, with CD & video sales dropping by -19.6% to a historic low of EUR178m.

India's collection revenues grew by two-fifths to exceed EUR80m

Creator revenues in India rose by +40.5% in 2024 to reach a record high of EUR80.5m, up from just EUR5.4m a decade ago. Digital was the main driver of this growth, accounting for 82.7% of the total and rising by +56.7%, boosted by a significant back payment and the continued shift from free to subscription-based streaming.

Live & background income also accelerated, rising by one-fifth to exceed EUR10m for the first time and making up 14% of the market. Broadcast revenue accounted for just 2.3% and dropped by half due to a contractual delay that deferred payments to the following year.



€1.9B

was collected in the Asia-Pacific region in 2024, a +2.9% rise that cements its position as the world leader in digital collections.

Broadcast resurgence helps drive South Korean growth

Broadcast revenues across Asia-Pacific declined by -3.4% in 2024. More than half of the total was collected in Japan, which fell by -7.1%. Australasia also saw a drop of -1.1%, largely due to reduced advertising spend. South Korea, however, bucked the regional trend, recording growth of +40.7%. This pushed the country's TV and radio sector to one-third above its 2015 level. Broadcast income reached EUR37.5m, adding more than EUR10m to the national total.

In other areas of the market, digital revenue in South Korea grew by +12.2%, increasing its market share to 48.1%. Live & background income also rose by +3.6%, driven by an increase in concerts and a stronger focus on collecting overdue payments from businesses.

The only significant decline came from CD & video, which fell by -27.7% following nine consecutive years of growth. Although it remains the second-largest revenue stream with a 19.9% share, the drop in consumption translated to 23 million fewer albums sold during the year.

Australasia grows by two-thirds over the decade

Australasia made up 22.9% of regional collections and grew by +3% to cap a +64.5% rise since 2015. For the third year in succession, digital comprised more than half of the market and the +3.7% increase during 2024 accounted for over 60% of the country's total growth. A rise in video-on-demand subscriptions also contributed to the overall collections. The sector's collections doubled over the past five years.

The second largest growth driver was live & background where revenues rose by +9.2%. With average licence fees still one-quarter below pre-pandemic levels, the live music sector in this market is still in a recovery phase. There was, however, strong growth in public performance revenue with improved coverage of retail, hospitality, bars and clubs driving a +43.3% increase over the past five years.

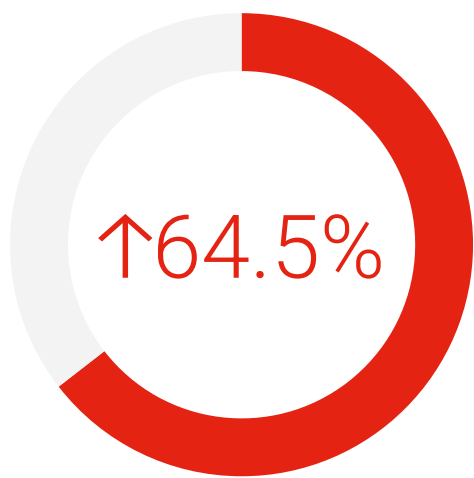
Strong growth in smaller collecting markets

Smaller markets in the Asia-Pacific region recorded a relatively higher growth rate than the top three markets. While Japan, Australasia and South Korea increased their combined revenues by +0.7% in 2024, the remaining territories rose by +18.8%, adding EUR45m to the regional total.

The fastest growth occurred in Macau, where live & background income increased by more than half, driving a +51.3% rise in overall revenue. The same sector grew even faster in Indonesia, while digital income rose by one quarter to account for 82.5% of the market. Existing contracts with TikTok, Spotify and YouTube were further strengthened by the first payment from Disney+ since it began operations in Indonesia in 2020.

In Singapore, digital revenue nearly tripled, combined with a +37.6% rise in public performance, which helped offset a sharp drop in broadcast income. The broadcast decline was due to an exceptional one-off payment in the previous year. In Malaysia, a +29.8% increase in live & background income, supported by a back payment covering three years of sync licensing, led to a +18.9% rise in total revenue.

China saw a +28.4% increase in digital revenue, despite its two largest online music platforms—Tencent Music and NetEase Cloud Music—having yet to reach agreements with local society MCSC. Combined with a back payment for broadcast royalties and gradual growth in live & background, this drove an overall revenue increase of +11.9%.



↑64.5%

growth since 2015 — Australasia's collections have risen by nearly two-thirds over the decade

Note on the Japan Exchange Rate impact

Due to significant currency fluctuations, particularly a nearly 20% decline in the JPY/EUR exchange rate from 2015 to 2025, collections from Japan expressed in euros understate the actual growth recorded in local currency. According to JASRAC, total collections between April 2024 and March 2025 reached JPY142,752m, representing a +4.1% increase year-on-year. Compared to the 2014–2015 fiscal year, this marks a +26.8% increase in collections over the decade in Japanese yen. This highlights a much stronger upward trend than is reflected in euro-converted figures.



Top three collecting countries/territories (EUR million)

Country/Territory	Collections	% Growth	vs 2015	vs 2020
 Japan	886	-1.1%	+15.5%	+5.2%
 Australasia	440	+3.0%	+64.5%	+35.3%
 South Korea	286	+2.5%	+166.7%	+58.8%
Grand Total	€1,922M	+3.0%	+55.0%	+27.6%

Collections by repertoire (EUR million)

Repertoire	Collections	% Growth	vs 2015	vs 2020
 Music	1,837	+2.9%	+59.9%	+29.6%
 Audiovisual	0.2	+9.9%	-	+24.5%
 Literary	77	+2.6%	-12.3%	-9.5%
 Drama	-	-	-	-
 Visual Arts	8	+14.8%	+227.4%	+96.0%
Grand Total	€1,922M	+3.0%	+55.0%	+27.6%



Digital: top 10 countries/territories (EUR million)

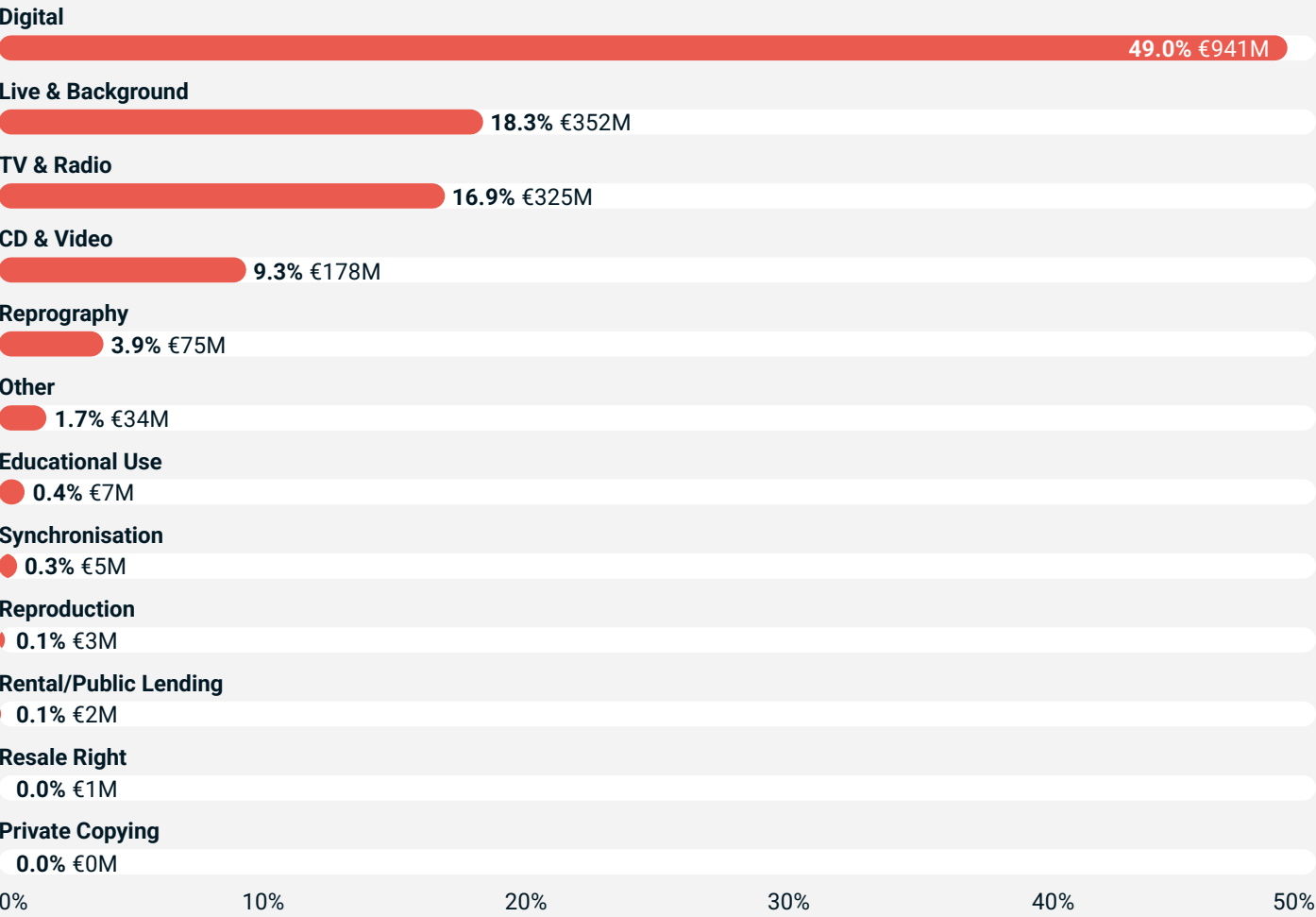
Country/Territory	Collections	% Growth	Digital Weight
 Japan	397	+7.1%	44.9%
 Australasia	225	+3.7%	51.2%
 South Korea	138	+12.2%	48.1%
 India	67	+56.7%	82.7%
 Hong Kong	30	+1.0%	64.0%
 China	19	+28.4%	32.6%
 Philippines	14	+12.3%	80.9%
 Vietnam	12	+15.7%	86.6%
 Taiwan, Chinese Taipei	11	+2.5%	45.7%
 Thailand	8	+13.6%	69.1%
Grand Total	€941M	+10.4%	



Breakdown of collections by type of use (EUR million)

Use category	Collections	% Growth	vs 2015	vs 2020
TV & Radio	325	-3.5%	-16.5%	-16.0%
Digital	941	+10.4%	+373.0%	+68.3%
Live & Background	352	+6.1%	+27.2%	+47.0%
CD & Video	178	-19.6%	-19.8%	-3.5%
Educational Use	7	+13.1%		+24.5%
Other	34	+0.5%	+8.2%	+19.4%
Private Copying	0	-20.1%	-95.9%	-66.2%
Rental/Public Lending	2	-30.3%	-91.8%	-75.7%
Reproduction	3	-9.1%	+57.5%	+133.3%
Reprography	75	+3.5%	-15.1%	-10.1%
Resale Right	1	-5.8%	+51.4%	+52.6%
Synchronisation	5	-15.6%	+127.2%	+18.4%
Grand Total	€3,518M	+10.0%	+99.7%	+61.5%

Share of collections by type of use (EUR million)





Collections by region

Latin America & the Caribbean

Latin American collections flatten following two years of exceptional growth

Collections in Latin America and the Caribbean fell by -0.6% in 2024 from the exceptional +29.2% and +66.1% recorded in the previous two years. The total collections reached EUR786m with the decrease driven predominantly by a significant fall in broadcast revenues. Live & background also contracted slightly whilst digital saw solid growth. Almost all the region's collections were made in these three primary sectors and the Latin American total has increased by nearly one half over the preceding decade.

Music remains by far the largest repertoire and grew by +3.3% to reach EUR718m. Literary income doubled, and visual arts revenue rose by +13.7%. Collections in the drama repertoire halved and audiovisual fell by -19.7% despite the improving legislative landscape in some countries.

Top three collecting countries (EUR million)

Country/Territory	Collections	% Growth	vs 2015	vs 2020
 Mexico	247	+9.2%	+353.5%	+178.5%
 Brazil	236	+5.0%	+37.2%	+77.9%
 Argentina	113	-36.2%	-37.7%	+34.8%
Grand Total	€786M	-0.6 %	+48.6%	+107.9%

Collections by repertoire (EUR million)

Repertoire	Collections	% Growth	vs 2015	vs 2020
 Music	718	+3.3%	+57.1%	+110.6%
 Audiovisual	51	-19.7%	-4.1%	+44.6%
 Literary	0.003	+98.7%	-82.0%	+493.2%
 Drama	17	-48.0%	-9.0%	+884.3%
 Visual Arts	0.5	+13.7%	+10.6%	+56.7%
Grand Total	€786M	-0.6%	+48.6%	+107.9%



€786M

was collected in Latin America and the Caribbean in 2024, marking a **-0.6% dip** after two years of exceptional growth.

Digital collections made up two-fifths of Latin America's total

Income from Latin America's digital sector rose +9% to reach EUR327m. With exponential increases in all the largest collecting countries across the decade, digital accounted for 41.6% of the regional total in 2024.

Mexico made up almost half of these revenues and, following market expansion and new contract negotiation, growth of +8.4% allowed the country's digital sector total to reach a record EUR161m. Digital was also the primary driver of growth in Brazil where local society UBC reported audio and audiovisual streaming increases of +17% and +22% respectively, leading to a combined +20.1% rise in digital collections.

In Colombia, digital grew by two-thirds due to improved income from distributors and an increase in the licensing of online and multimedia content. Peru's digital revenues grew +37.3%, with a drop in Subscription Video on Demand (SVOD) uptake being more than offset by a rise in new digital licences and increased use of music across digital platforms. Similar trends were observed in Ecuador (+41%), Uruguay (+52.2%), El Salvador (+30.5%) and Venezuela (+51.8%), whilst in Guatemala, digital revenues more than doubled.

Live & background falls despite strong performance in the majority of countries

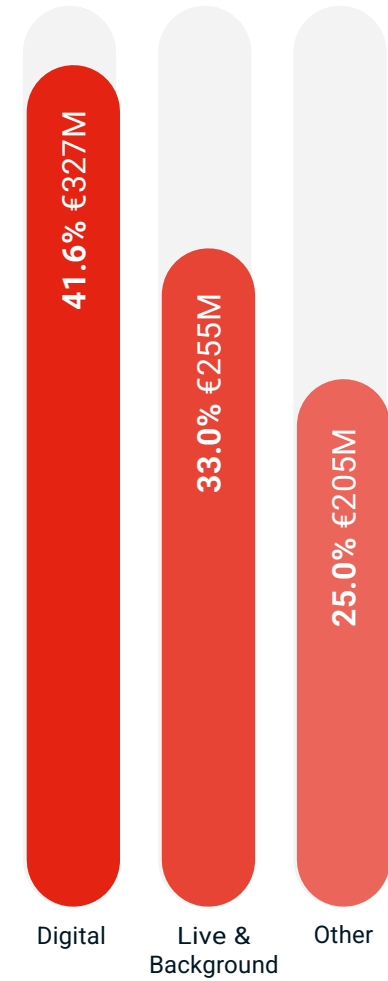
Revenues from the use of music in businesses and at live events fell by -1% to reach EUR255m. Making up one-third of the regional total in 2024, this sector saw strong performance in the majority of countries but a significant decline in Argentina reversed the trend.

In Brazil, UBC reported a +33% increase in live concerts compared to 2023, which combined with the important Carnaval and Festa Junina festivals to drive a +5.7% rise in this sector. In Mexico, SACM saw music concert growth of +19.2%, which together with improved efficiency in background music collections produced a national live & background increase of +21.7%.

In Peru, more than half of all revenue came from this sector with market growth driving a rise of +20.4%. This was illustrated by increases in the number of licences that local society APDAYC issued to permanent premises (+17%), dance events (+35%) and entertainment concerts (+23%). In Panama, +20.4% sector rise was attributed to increased revenues from the hotel and cruise ship industries.

Argentina had made up one quarter of regional live & background revenues in 2023, but a drop of -40.7% created a EUR27m negative swing in the total. With Argentina's results removed, the rest of Latin America saw a combined rise of +12.8% in this sector.

Latin America's Music Collections



Digital dominates Latin America's collections at 41.6% of total revenues, followed by live & background at one-third.



Mexico extends regional lead whilst Argentina faces challenges ahead

Revenues from Latin America’s largest collecting country, Mexico, grew by +9.2% to reach EUR247m. For the first time, the country made over 30% of the regional total with the ten-year increase being more than fourfold. Digital remained the largest sector here and accounted for nearly two-thirds of all Mexican collections. Brazil grew revenues by +5%, with local society UBC registering a record 2.8 million works, 1.4 million sound recordings and nearly 22,000 audiovisual works during the year.

Collections in Argentina were hampered by economic effects total reaching EUR113m following a -36.2% decrease. Revenue distortions due to monthly changes in price indices made comparisons with previous years difficult. In addition, there may be further challenges ahead as sweeping executive decrees begin to abolish the legal monopoly on collective management and open the market to potential competition and direct licensing. CISAC and its members are calling on the Argentine government to ensure that these reforms do not destabilise existing CMOs and weaken creators’ protections.

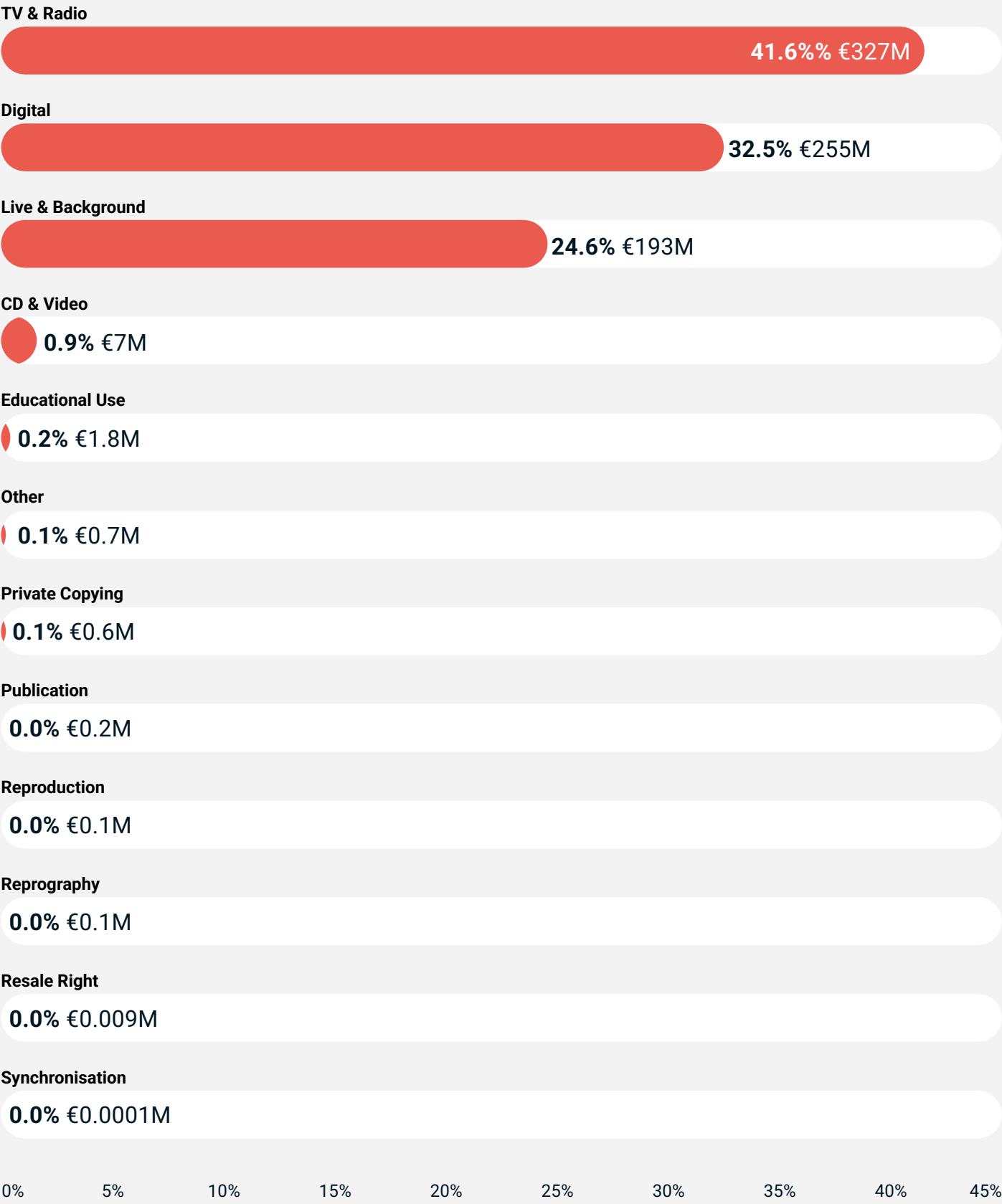
Breakdown of collections by type of use (EUR million)

Use category	Collections	% Growth	vs 2015	vs 2020
TV & Radio	193	-12.2%	-30.7%	+19.3%
Digital	327	+9.0%	+2602.1%	+182.4%
Live & Background	255	-1.0%	+17.3%	+178.3%
CD & Video	0.6	+15.0%	-84.8%	+19.0%
Educational Use	0.1	+26.0%	-	-
Other	0.7	-20.4%	-64.4%	+1090.8%
Private Copying	1.8	-21.5%	+715.8%	+57.9%
Publication	0.009	0.0%	-	-19.4%
Reproduction	0.2	-15.6%	-37.9%	-27.0%
Reprography	0.0001	-88.0%	-	-
Resale Right	0.1	+51.2%	-	+167.2%
Synchronisation	7	-19.3%	-48.7%	+6.6%
Grand Total	€786M	-0.6%	48.6%	+107.9%



Brazilian singer Anitta performing at the 2024 Rock The Mountain festival Rio de Janeiro, Brazil.

Share of collections by type of use (EUR million)



Collections by region

Africa

Broadcast income contributes largely to African collections

Collections in Africa rose by +14.2% in 2024 to reach EUR90m, a total that increased by +29.8% over the decade. While it remains the world’s smallest collecting region, the rate of growth in 2024 was more than four percentage points higher than any other market globally.

Music revenues increased by +10%, reaching nearly EUR80m and concluding a +30% rise over the decade. Audiovisual income grew by +2.6%, drama by +18.2% and literature by an exceptional +90.8%, driven by the start of new collections for reprography (the licensed photocopying or reproduction of printed works, such as books and articles, in educational and institutional settings) in Morocco. Visual arts was the only sector to decrease, falling by -26.5% from an already small base.

Broadcast was the largest source of income, making up 38% of the region and rising by +14.5% to contribute more than one-third of all African growth. Live & background revenue grew by +13.8%, with strong increases in South Africa, Morocco and Kenya. Digital rose by +14.6% to reach EUR14.9m, but in stark contrast to other global regions where totals have multiplied over the decade, African digital collections remained just two-fifths above the 2015 level.

Top three collecting countries/territory (EUR million)

Country/Territory	Collections	% Growth	vs 2015	vs 2020
 South Africa	48	+12.4%	+44.4%	+30.3%
 Morocco	12	+46.8%	+1262.5%	+59.7%
 Côte d'Ivoire	7	-10.8%	+160.4%	+56.0%
Grand Total	€90M	+14.2%	+29.8%	+42.6%

Three countries continue to dominate regional African collections

Following double-digit growth, South Africa remained the dominant contributor to the African region’s collections, accounting for more than half of the total. Morocco grew even faster at +46.8%, while Côte d’Ivoire posted a solid increase of +21.6%. Together, these top three markets represented 73% of the regional total. In 2015, their combined share was closer to 50%, but a decade of growth, totalling +81.6%, has seen them pull significantly ahead of the rest of the region.

In 2024, however, the fastest-growing individual country in Africa was ninth-placed Guinea, where income more than doubled, driven by rapid growth in broadcast revenues and a five-fold rise in private copying during its second year of collections. Zimbabwe also saw strong growth, increasing by +55.9% to complete a four-fold rise over the decade. Meanwhile, the return of the live & background sector in Kenya contributed to an increase of +59.5%.

South Africa sees growth in its top three revenue streams

Collections in South Africa accounted for 52.6% of the region and increased by +12.4% in 2024 to reach EUR47.5m. Nearly half of total revenues came from the broadcast sector, which rose by +11.5% following a TV licence renegotiation that enabled creators to share in the growth of a major national broadcaster. A strong rise in radio revenue was also recorded, supported by increased advertising income.

Digital revenues also grew, rising by +16.6% to account for one-quarter of the South African market. Audio streaming and subscription video performed well, supported by a joint licence agreement between local societies CAPASSO and SAMRO, which bolstered digital income. The fastest-growing segment was live & background, where a rise in concert activity more than doubled income from live music and drove a +23.1% increase in the sector’s total revenue. This revenue stream now represents nearly one-fifth of South Africa’s total collections but has risen just +1.1% over the past decade.

New reprography collections drive growth in Morocco

Collections in Morocco rose by +46.8% in 2024 to reach EUR11.8m, making up 13% of the regional total. This represents a thirteen-fold increase in national revenue since 2015.

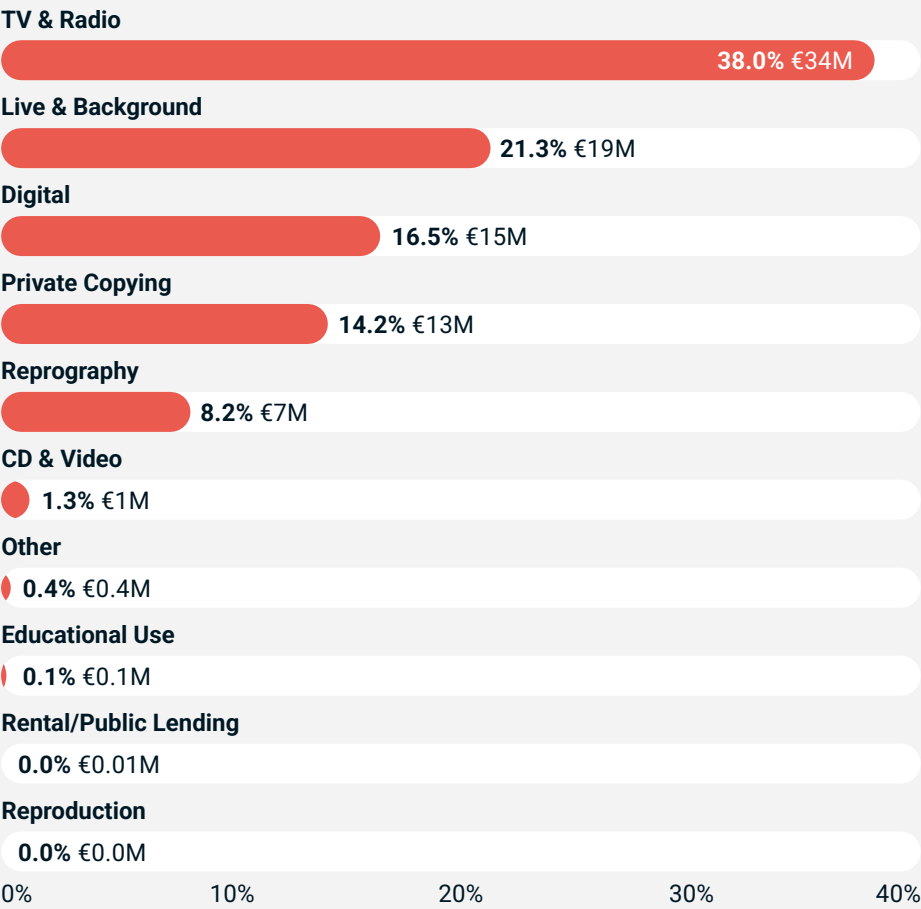
The main driver of growth was an amendment to Morocco’s legislation that introduced a reprographic right, allowing for royalty payments from the duplication of creators’ works. This law came into effect in November 2023, and in its first year, reprography collections generated EUR3.8m—accounting for nearly one-third of the country’s total collections.

Broadcast and live & background collections also grew significantly, rising by +57.3% and +39.9% respectively. Both sectors ended the year with totals more than three times higher than in 2015. Private copying remained Morocco’s largest revenue source. Despite a drop of -14.4%, income from this source still exceeded EUR5m. As in many African countries, it continues to provide a vital lifeline for creators.

Breakdown of collections by type of use (EUR million)

Use category	Collections	% Growth	vs 2015	vs 2020
TV & Radio	34	+14.5%	+25.1%	+24.1%
Digital	15	+14.6%	+41.2%	+102.1%
Live & Background	19	+13.8%	+8.4%	+47.8%
CD & Video	1	-40.1%	+30.9%	-22.2%
Educational Use	0.1	0.0%	-	-
Other	0.4	-70.6%	-5.2%	-19.9%
Private Copying	13	+6.4%	+43.7%	+20.6%
Rental/Public Lending	0.01	-93.1%	-88.9%	+73.2%
Reproduction	0.00	-97.4%	-97.3%	-82.4%
Reprography	7	+107.0%	+125.8%	+176.9%
Grand Total	€90M	+14.2%	+29.8%	+42.6%

Share of collections by type of use (EUR million)





€90M

was collected in Africa in 2024, a +14.2% rise.

Table of collections

All repertoires



Collections in
EUR Million

Rank		Country/Territory	Collections	Growth	Global share
1		United States	3,147	+10.8%	22.5%
2		France	1,910	+7.5%	13.7%
3		United Kingdom	1,261	+7.4%	9.0%
4		Germany	1,075	+3.4%	7.7%
5		Japan	886	-1.1%	6.3%
6		Italy	729	+4.3%	5.2%
7		Australasia	440	+3.0%	3.1%
8		Canada	371	+3.2%	2.7%
9		Spain	371	+12.3%	2.7%
10		Netherlands	338	+7.1%	2.4%
11		South Korea	286	+2.5%	2.0%
12		Switzerland	270	+3.6%	1.9%
13		Mexico	247	+9.2%	1.8%
14		Brazil	236	+5.0%	1.7%
15		Sweden	217	+7.1%	1.6%
16		Belgium	188	+7.3%	1.3%
17		Denmark	171	+3.1%	1.2%
18		Poland	156	+4.5%	1.1%
19		Austria	127	+2.2%	0.9%
20		Finland	122	+4.0%	0.9%
21		Argentina	113	-36.2%	0.8%
22		India	80	+40.5%	0.6%
23		Norway	78	-2.8%	0.6%
24		Portugal	75	+4.9%	0.5%
25		Czechia	73	+5.8%	0.5%
26		China	57	+11.9%	0.4%
27		Israel	55	-6.9%	0.4%
28		Colombia	52	+30.5%	0.4%
29		Russia	51	+16.1%	0.4%
30		Hungary	51	+16.5%	0.4%
31		South Africa	47	+12.4%	0.3%
32		Greece	47	+17.0%	0.3%
33		Hong Kong	47	+8.4%	0.3%
34		Romania	45	+23.6%	0.3%
35		Chile	44	+4.9%	0.3%
36		Ireland	42	+18.1%	0.3%
37		Turkiye	37	+49.0%	0.3%
38		Peru	30	+19.5%	0.2%
39		Singapore	29	+1.3%	0.2%
40		Croatia	29	+17.8%	0.2%
41		Slovenia	27	+52.3%	0.2%
42		Taiwan, Chinese Taipei	25	+9.3%	0.2%
43		Slovakia	20	+14.2%	0.1%
44		Serbia	18	+9.2%	0.1%
45		Philippines	17	+11.4%	0.1%
46		Malaysia	17	+18.9%	0.1%
47		Uruguay	15	+12.3%	0.1%
48		Viet Nam	14	+12.7%	0.1%
49		Lithuania	12	+15.0%	0.1%
50		Morocco	12	+46.8%	0.1%

Music



Collections in
EUR Million

Rank		Country/Territory	Collections	Growth	Global share
1		United States	3,140	+10.9%	24.9%
2		France	1,503	+7.9%	11.9%
3		United Kingdom	1,178	+8.2%	9.4%
4		Germany	1,019	+3.9%	8.1%
5		Japan	885	-1.1%	7.0%
6		Italy	576	+5.1%	4.6%
7		Canada	368	+3.2%	2.9%
8		Australasia	366	+3.5%	2.9%
9		Spain	299	+12.2%	2.4%
10		Netherlands	285	+8.8%	2.3%
11		South Korea	276	+2.0%	2.2%
12		Brazil	235	+5.0%	1.9%
13		Mexico	232	+9.2%	1.8%
14		Sweden	201	+7.9%	1.6%
15		Switzerland	170	+2.0%	1.3%
16		Denmark	159	+1.3%	1.3%
17		Belgium	130	+7.3%	1.0%
18		Poland	113	+11.9%	0.9%
19		Austria	94	+2.2%	0.7%
20		Finland	82	+5.2%	0.6%
21		India	80	+40.5%	0.6%
22		Norway	75	-3.7%	0.6%
23		Argentina	74	-27.2%	0.6%
24		Portugal	66	+7.0%	0.5%
25		Czechia	58	+4.9%	0.5%
26		China	56	+10.3%	0.4%
27		Israel	47	-6.0%	0.4%
28		Hong Kong	47	+8.4%	0.4%
29		Colombia	46	+23.3%	0.4%
30		Hungary	46	+16.8%	0.4%
31		Russia	46	+20.7%	0.4%
32		South Africa	44	+13.6%	0.3%
33		Ireland	42	+18.2%	0.3%
34		Romania	39	+25.3%	0.3%
35		Greece	39	+16.0%	0.3%
36		Chile	38	-3.0%	0.3%
37		Turkiye	37	+49.0%	0.3%
38		Peru	30	+19.4%	0.2%
39		Singapore	29	+1.3%	0.2%
40		Croatia	27	+18.4%	0.2%
41		Taiwan, Chinese Taipei	25	+9.3%	0.2%
42		Slovenia	22	+78.3%	0.2%
43		Serbia	18	+9.0%	0.1%
44		Philippines	17	+11.4%	0.1%
45		Malaysia	17	+18.9%	0.1%
46		Slovakia	14	+17.8%	0.1%
47		Viet Nam	14	+12.7%	0.1%
48		Uruguay	13	+13.0%	0.1%
49		Thailand	12	+8.8%	0.1%
50		Ecuador	9	+24.5%	0.1%

Audiovisual

Collections in
EUR Million

Rank		Country/Territory	Collections	Growth	Global share
1		France	281	+6.6%	38.7%
2		Italy	64	-0.7%	8.7%
3		Switzerland	63	+0.2%	8.6%
4		Spain	52	+18.6%	7.2%
5		Belgium	37	+2.1%	5.1%
6		Poland	36	-14.0%	4.9%
7		Argentina	24	-46.1%	3.3%
8		United Kingdom	22	+9.1%	3.0%
9		Netherlands	21	+2.7%	2.9%
10		Germany	17	-18.4%	2.3%
11		Austria	16	+2.9%	2.2%
12		Mexico	15	+9.9%	2.1%
13		Finland	13	0.0%	1.8%
14		Greece	9	+21.9%	1.2%
15		Israel	8	-11.2%	1.1%
16		Czechia	8	-1.9%	1.1%
17		Chile	6	+126.8%	0.8%
18		Romania	6	+13.8%	0.8%
19		Colombia	6	+148.9%	0.8%
20		Portugal	4	-15.9%	0.5%

Drama

Collections in
EUR Million

Rank		Country/Territory	Collections	Growth	Global share
1		France	69	+3.2%	33.2%
2		Italy	68	+5.9%	32.8%
3		Argentina	14	-51.8%	7.0%
4		Spain	12	+13.1%	6.0%
5		Switzerland	12	+0.3%	5.7%
6		Belgium	10	+5.7%	4.7%
7		Poland	7	+9.3%	3.2%
8		Russia	6	-11.4%	2.7%
9		Portugal	2	+17.5%	1.1%
10		Uruguay	2	+3.6%	0.7%
11		Lithuania	1	+31.4%	0.6%
12		Latvia	1	+15.4%	0.4%
13		Belarus	1	+10.4%	0.3%
14		Slovakia	1	+15.6%	0.3%
15		Mexico	0	+24.6%	0.2%
16		Estonia	0	-13.0%	0.1%
17		Luxembourg	0	-63.6%	0.1%
18		Armenia	0	+2.2%	0.1%
19		Brazil	0	+14.3%	0.1%
20		Chile	0	-31.3%	0.1%

Visual Arts

Collections in
EUR Million

Rank		Country/Territory	Collections	Growth	Global share
1		France	49	+2.9%	22.3%
2		Germany	39	+2.8%	17.9%
3		United Kingdom	24	-18.2%	10.8%
4		Sweden	16	-2.4%	7.4%
5		Netherlands	14	+4.1%	6.6%
6		Italy	12	-0.4%	5.5%
7		Denmark	12	+36.3%	5.3%
8		Belgium	8	+24.4%	3.8%
9		Spain	7	-16.3%	3.4%
10		Finland	7	+2.1%	3.1%
11		United States	7	-8.7%	3.0%
12		Austria	6	-5.0%	2.7%
13		South Korea	4	+16.2%	1.7%
14		Australia	3	-10.5%	1.3%
15		Norway	3	+31.5%	1.2%
16		Czechia	2	+6.8%	1.0%
17		China	1	+967.9%	0.4%
18		Switzerland	1	-23.1%	0.4%
19		Portugal	1	+60.7%	0.3%
20		Japan	1	+3.1%	0.2%

Literature

Collections in
EUR Million

Rank		Country/Territory	Collections	Growth	Global share
1		Australia	71	+1.3%	30.7%
2		United Kingdom	38	+3.7%	16.3%
3		Switzerland	25	+33.8%	10.9%
4		Finland	21	+2.4%	8.9%
5		Netherlands	18	-8.3%	7.9%
6		Austria	11	+5.8%	4.7%
7		Italy	8	-10.3%	3.6%
8		France	8	+26.6%	3.5%
9		South Korea	6	+20.1%	2.7%
10		Czechia	5	+36.4%	2.0%
11		Morocco	4	+6336.8%	1.6%
12		Belgium	3	+43.9%	1.5%
13		South Africa	3	-1.6%	1.4%
14		Portugal	3	-19.7%	1.3%
15		Slovakia	1	+8.9%	0.6%
16		Hungary	1	+16.8%	0.5%
17		Slovenia	1	+27.6%	0.4%
18		Lithuania	1	+3.2%	0.3%
19		Latvia	1	-5.6%	0.3%
20		Algeria	0	+42.8%	0.2%

Membership by region

Status key

M

Member

A

Associate

P

Provisional

Repertoire key

M

Music

AV

Audiovisual

AGP

Visual Arts

L

Literature

D

Drama

NP

No Repertoire

Europe

47 countries - 113 members

Society	Status	Repertoire	Country/ Territory
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, D, L, AGP	Albania
ALCS	M	AV, L, AGP	United Kingdom
AMUS	P	M	Bosnia And Herzegovina
ANCO	P	M	Moldova, Republic Of
ARMAUTHOR NGO	M	D, M	Armenia
ARMCINEMAAUTHOR	P	AV	Armenia
ARTISJUS	M	M, L	Hungary
ASOCIJACIJA AUTORA	P	AGP	Serbia
ATHINA-SADA	P	AV	Greece
AUTODIA	M	M	Greece
AVTE	A	AV	France
AZDG	P	AV	Azerbaijan
BILDRECHT	M	AGP	Austria
BILDUPPHOVSRÄTT	M	AGP	Sweden
BONO	M	AGP	Norway
BUMA	M	M	Netherlands
COPYSWEDE	P	AV	Sweden
CRSEA	A	NR	Russian Federation
DACIN SARA	M	AV	Romania
DACS	M	AGP	United Kingdom
DAMA	M	AV	Spain
DHFR	M	AV	Croatia
DILIA	M	AV, L	Czech Republic
DIRECTORS UK	M	AV	United Kingdom
EAU	M	M, AV, D, AGP	Estonia
EDEM	P	M	Greece
EKKI	P	M, D, AV, L, AGP	Spain
EVA	A	AGP	Belgium
FILMAUTOR	M	AV	Bulgaria
FILMJUS	M	AV	Hungary

Society	Status	Repertoire	Country/ Territory
GEMA	M	M	Germany
GESAC	A	NR	Belgium
GESTOR	M	AGP	Czech Republic
HDS-ZAMP	M	M	Croatia
HUNGART	M	AGP	Hungary
IAF	A	AV	United Kingdom
IMPF	A	M	Belgium
IMRO	M	M	Ireland
ISOCRATIS	P	AV	Greece
KAZAK	P	M, D, L	Kazakhstan
KODA	M	M	Denmark
KOPIOSTO	M	AV, L, AGP	Finland
KUVASTO	M	AGP	Finland
LATGA	M	M, AV, D, L, AGP	Lithuania
LIRA	M	L, AV	Netherlands
LITA	M	AV, D, L, AGP	Slovakia
LITERAR-MECHANA	M	L, AV	Austria
MESAM	M	M	Turkey
MRIGHTS	P	AV, D	Italy
MSG	M	M	Turkey
MUSICAUTOR	M	M	Bulgaria
MYNDSTEF	P	AGP	Iceland
NCB	M	M	Denmark
NCIP	P	M, D	Belarus
NGO-UACRR	P	M, D	Ukraine
OAZA	M	AV	Czech Republic
OFA	P	AGP	Serbia
OOA-S	M	AV, AGP	Czech Republic
OSA	M	M	Czech Republic
OSDEETE	P	AGP	Greece
PAM CG	M	M	Montenegro
PICTORIGHT	M	AGP	Netherlands
PROLITTERIS	M	L, AGP	Switzerland
PRS FOR MUSIC	M	M	United Kingdom
RAO	M	M, D, AGP	Russian Federation
SAA	A	AV	Belgium
SABAM	M	M, AV, D, L, AGP	Belgium
SACD	M	AV, D, L	France
SACEM	M	M	France

Society	Status	Repertoire	Country/ Territory
SACEMPLUXEMBOURG	M	M	Luxembourg
SAIF	M	AGP	France
SANASTO	M	L	Finland
SAZAS	M	M	Slovenia
SCAM	M	AV, L, AGP	France
SDADV	P	M, AV, D, L, AGP	Andorra
SEDA	P	M	Spain
SEF	P	AV	Turkey
SGAE	M	M, AV, D	Spain
SIAE	M	M, AV, D, L, AGP	Italy
SIIP	P	M, AV, D, L, AGP	Uzbekistan
SOFAM	M	AGP	Belgium
SOKOJ	M	M	Serbia
SOZA	M	M	Slovakia
SPA	M	M, AV, D, L, AGP	Portugal
SSA	M	AV, D	Switzerland
STEF	M	M	Iceland
STEMRA	M	M	Netherlands
STIM	M	M	Sweden
SUISA	M	M	Switzerland
SUISSIMAGE	M	AV	Switzerland
TALI	M	AV	Israel
TEOSTO	M	M	Finland
TONO	M	M	Norway
UCMR-ADA	M	M	Romania
UFFICIO GIURIDICO	A	NR	Vatican City State
VAPIK	P	AV	Kosovo
VDFS	M	AV	Austria
VEGAP	M	AGP	Spain
VEVAM	M	AV	Netherlands
VG BILD-KUNST	M	AGP, AV	Germany
VG WORT	P	AV, L	Germany
VISARTA	P	AGP	Romania
VISDA	M	AGP	Denmark
ZAIKS	M	M, D	Poland
ZAMP MACEDONIA	M	M	North Macedonia
ZAMP SLOVENIA	M	L	Slovenia
ZAPA	M	ADP	Polan

Status key

M

Member

A

Associate

P

Provisional

Repertoire key

M

Music

AV

Audiovisual

AGP

Visual Arts

L

Literature

D

Drama

NP

No Repertoire

Canada/USA2 countries - 12 members

Asia-Pacific16 countries/territories - 33 members

Latin America and the Caribbean22 countries/territories - 44 members

Society	Status	Repertoire	Country/ Territory
AMRA	M	M	United States
ARS	M	AGP	United States
ASCAP	M	M	United States
ASCRL	P	AGP	United States
CARCC	M	AGP	Canada
CSCS	M	AV	Canada
DGA	A	AV	United States
DRCC	M	AV	Canada
THE MLC	P	M	United States
SARTEC	A	AV	Canada
SOCAN	M	M, AGP	Canada
SPACQ	A	M	Canada



Sebastian Gaskin performs at the 2024 SOCAN awards.

Society	Status	Repertoire	Country/ Territory
AMCOS	M	M	Australasia
APG-JAPAN	A	AGP	Japan
APRA	M	M	Australasia
ASDACS	M	AV	Australia
AWGACS	M	AV	Australia
CASH	M	M	Hong Kong
COMPASS	M	M	Singapore
COPYRIGHT AGENCY	M	L, AGP	Australia
CPSN	A	M	Nepal
DEGNZ	A	AV	New Zealand
DGJ	A	AV	Japan
DGK	P	AV	South Korea
FILSCAP	M	M	Philippines
IPRS	M	M	India
JASPAR	M	AGP	Japan
JASRAC	M	M	Japan
KOLAA	M	L, AGP	South Korea
KOMCA	M	M	South Korea
KOSCAP	P	M	South Korea
KTRWA	P	AV	South Korea
MACA	M	M	Macau
MACP	M	M	Malaysia
MCSC	M	M	China
MCT	M	M	Thailand
MRCSN	P	M	Nepal
MÜST	M	M	Taiwan, Chinese Taipei
RRA	P	AGP	Australasia
SACENC	M	M	New Caledonia (France)
SACK	M	AGP	South Korea
SRAI	P	AV	India
VCPMC	M	M	Vietnam
WAMI	M	M	Indonesia
WGJ	P	AV	Japan

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, AV, D, AGP	Cuba
ADDAF	M	M	Brazil
AEI-GUATEMALA	M	M	Guatemala
AGADU	M	M, AV, D, AGP	Uruguay
AMAR SOMBRÁS	M	M	Brazil
APA	M	M	Paraguay
APDAYC	M	M, D	Peru
APSAV	P	AGP	Peru
ARGENTORES	M	AV, D	Argentina
ASSIM	M	M	Brazil
ATN	M	AV, D	Chile
AUTVIS	M	AGP	Brazil
COSCAP	P	M	Barbados
COTT	M	M	Trinidad And Tobago
CREAIMAGEN	P	AGP	Chile
DAC	M	AV	Argentina
DASC	M	AV	Colombia
DBCA	P	AV	Brazil

Society	Status	Repertoire	Country/ Territory
DIRECTORES	P	AV	Mexico
DYGA	P	AV	Chile
ECCO	P	M	Chile
GEDAR	P	AV	Brazil
JACAP	M	M	Jamaica
REDES	M	AV	Colombia
SACIM, EGC	P	M	El Salvador
SACM	M	M	Mexico
SACVEN	P	M, D	Venezuela
SADAIC	M	M	Argentina
SAYCE	M	M	Ecuador
SAYCO	M	M, D	Colombia
SBACEM	M	M	Brazil
SCD	M	M	Chile
SGACEDOM	M	M	Dominican Republic
SICAM	M	M	Brazil
SOBODAYCOM	M	M	Bolivia
SOCINPRO	M	M	Brazil
SOGEM	P	AV, D, L	Mexico
SOMAAP	M	AGP	Mexico
SPAC	M	M	Panama
UBC	M	M	Brazil



Brazilian singer João Gomes performing at the 2024 São João de Caruaru festival, Brazil.

Status key

M

Member

A

Associate

P

Provisional

Repertoire key

M

Music

AV

Audiovisual

AGP

Visual Arts

L

Literature

D

Drama

NP

No Repertoire

Africa

24 countries/territories - 26 members

Society	Status	Repertoire	Country/Territory
AVRS	P	AV	Nigeria
BBDA	P	M, AV, D, L, AGP	Burkina Faso
BCDA	P	M, AV, D, AGP	Congo
BGDA	P	M, AV, D	Guinea
BMDAV	M	M, AV, D, L	Morocco
BUBEDRA	P	M, D, L, AGP	Benin
BUMDA	P	M, AV, D, L, AGP	Mali
BURIDA	P	M, AV, D, L, AGP	Côte D’ivoire
CAPASSO	M	M	South Africa
COSBOTS	P	M, L, AGP	Botswana
COSOMA	P	M, L	Malawi
COSOTA	P	M	Tanzania, United Republic Of
GHAMRO	P	M	Ghana
LESCOSAA	P	M, AV, D, L, AGP	Lesotho
MALI MALIKI INSTITUTE	A	M, AV, D, L, AGP	Ghana
MASA	P	M	Mauritius
MCSK	P	M	Kenya
NASCAM	P	M	Namibia
OMDA	P	M, AV, D, L	Madagascar
ONDA	M	M, AV, D, L	Algeria
SAMRO	M	M	South Africa
SCM-COOPERATIVA	M	M	Cabo Verde
SODAV	M	M, AV, D, L, AGP	Senegal
UNAC-SA	P	M	Angola
UPRS	P	M	Uganda
ZIMURA	M	M	Zimbabwe



CISAC’s Samuel Sangwa and Yvonne Chaka Chaka gather with members of UEMOA for a private copying seminar in February 2024.

New CISAC Members

as of May 2025

Society	Status	Repertoire	Country/Territory	Region
ARMCINEMAAUTHOR	P	AV	Armenia	Europe
ASOCIJACIJA AUTORA	P	AGP	Serbia	Europe
THE MLC	P	MU	United States	Canada/Usa
MRIGHTS	P	AV, D	Italy	Europe
KTRWA	P	AV	South Korea	Asia-Pacific
OSDEETE	P	AGP	Greece	Europe
RRA	P	AGP	New Zealand	Asia-Pacific
SRAI	P	AV	India	Asia-Pacific
VAPIK	P	AV	Kosovo	Europe
VG WORT	P	AV, L	Germany	Europe
WG	P	AGP	Japan	Asia-Pacific

Societies who are no longer CISAC members (as of May 2025)

Society	Repertoire	Country/Territory
ARTEGESTION	AGP	Ecuador
GCA	MU, D, L	Georgia
ICSC	AGP	China
IVARO	AGP	Ireland
MOSCAP	MU, AV	Mongolia
OTDAV	MU, D, L	Tunisia
RSAU	D, AGP, L, AV, MU	Rwanda
SACERAU	MU, AV	Egypt
SAVA	AGP	Argentina
ZAMCOPS	MU	Zambia

CISAC Client Rights Management Entities (RME)

Society	Repertoire	Country/Territory
ALLTRACK	M	United States
BMI	M	United States
BRIDGER	M	Luxembourg
CMRRA	M	Canada
DALRO	L, D, AGP	South Africa
ESMAA	M	United Arab Emirates
HEXACORP LTD	M	United States
MCPS	M	United Kingdom
NEX TONE	M	Japan
SESAC	M	United States
SOUNDREEF	M	United Kingdom
UNISON	M	Spain

About the report

Royalty income data is compiled from its collective management organisation (CMO) members to generate this comprehensive annual global collection report.

This report features figures up based on the gross domestic collections of 227 CISAC members in 116 countries as of 2024.

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, and via the five CISAC repertoires that member societies represent: music, audiovisual, drama, literature and visual arts. slipping through the cracks has grown.

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 such as 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 like CDs, vinyl or a digital download. Mechanical rights 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 may copy works from one device to another through a private copying exception in certain national laws. Creators can be compensated for this exemption through a private copying remuneration, typically in the form of a levy on blank digital media or electronic devices with data-storage capability.

Other Rights

Other rights include all that do not fall under performing or reproduction rights such as royalties from private copying levy schemes, rental or public lending, educational use, synchronisation, exhibition, and the resale right (for visual artists, collected from auction houses and galleries.)

Types of use

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

Performing Rights

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

Live & Background

Collections for the performance of works in front of a live audience (e.g., playing, reciting, singing in public) and from recorded works played in public places such as hotels, restaurants, clubs, or karaoke bars.

Digital and Multimedia

Collections from licensing digital services (e.g., downloads, streaming platforms) or use of works on recordable digital media (e.g., USB keys).

Compact Discs (CDs)

Collections from licensing the mechanical reproduction of musical works on CDs, vinyl records, or cassettes.

Video

Collections from licensing musical works within audiovisual productions reproduced on DVDs or Blu-ray.

Mechanical Reproduction

Collections from reproduction of works such as books, newspapers, and brochures in drama, literature, and visual arts repertoires (excluding music).

Reprography

Collections from photocopying or printing graphic works, usually gathered from manufacturers or importers of such devices.

Private Copying

Levies collected from manufacturers or distributors of blank media and devices with storage capacity (e.g., smartphones, computers), compensating rightsholders for personal use copying.

Resale Right

A small percentage of the resale price paid to visual artists when their works are re-sold through auction houses or galleries.

Rental and Public Lending

Collections from the rental or lending of original or copied creative works to the public.

Synchronisation Right

Collections from incorporating a musical work into a soundtrack accompanying visual images (e.g., films, commercials, games).

Exposition Right

Collections from the public exhibition or display of artworks (e.g., museums).

Educational

Collections from educational institutions for the use of works in teaching, including classroom performance or display.

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. 37% of collections declared to CISAC come from the Eurozone while 23% are expressed in US dollar, 9% in pound sterling and 6% in yen. Three-quarters of the global remuneration of creators for the use of their works are expressed in these four currencies.

For the current year, collections are expressed or converted in Euro at an average rate for 2024. Previous year figures are converted into Euro using the average rate of the corresponding year. Year-by-year comparisons are impacted by currency variations. These play a role when dealing with global or aggregated data in Euros.

This may also affect national comparisons, except when it is noted that local currencies have been used.

Collection figures have been rounded up or down to the nearest million or thousands. Some totals may be affected and don't add up exactly to the sum of data because of the rounding effect. Percentages are calculated using the actual unrounded figures.

In this 2025 report, country data from previous years may occasionally be corrected or re-stated in order to establish accurate like-for-like comparisons or to deal with the impact caused by changes in CISAC membership. When societies join CISAC and declare their income, this automatically increases revenues in their country. When societies stop being CISAC members, collections from their country appear to decrease compared to previous reports. US digital rights income flowing via the Mechanical Licensing Collective (MLC) are not included in this report as the MLC became a CISAC member in 2025.

Credit

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