

Global Collections Report: Music highlights



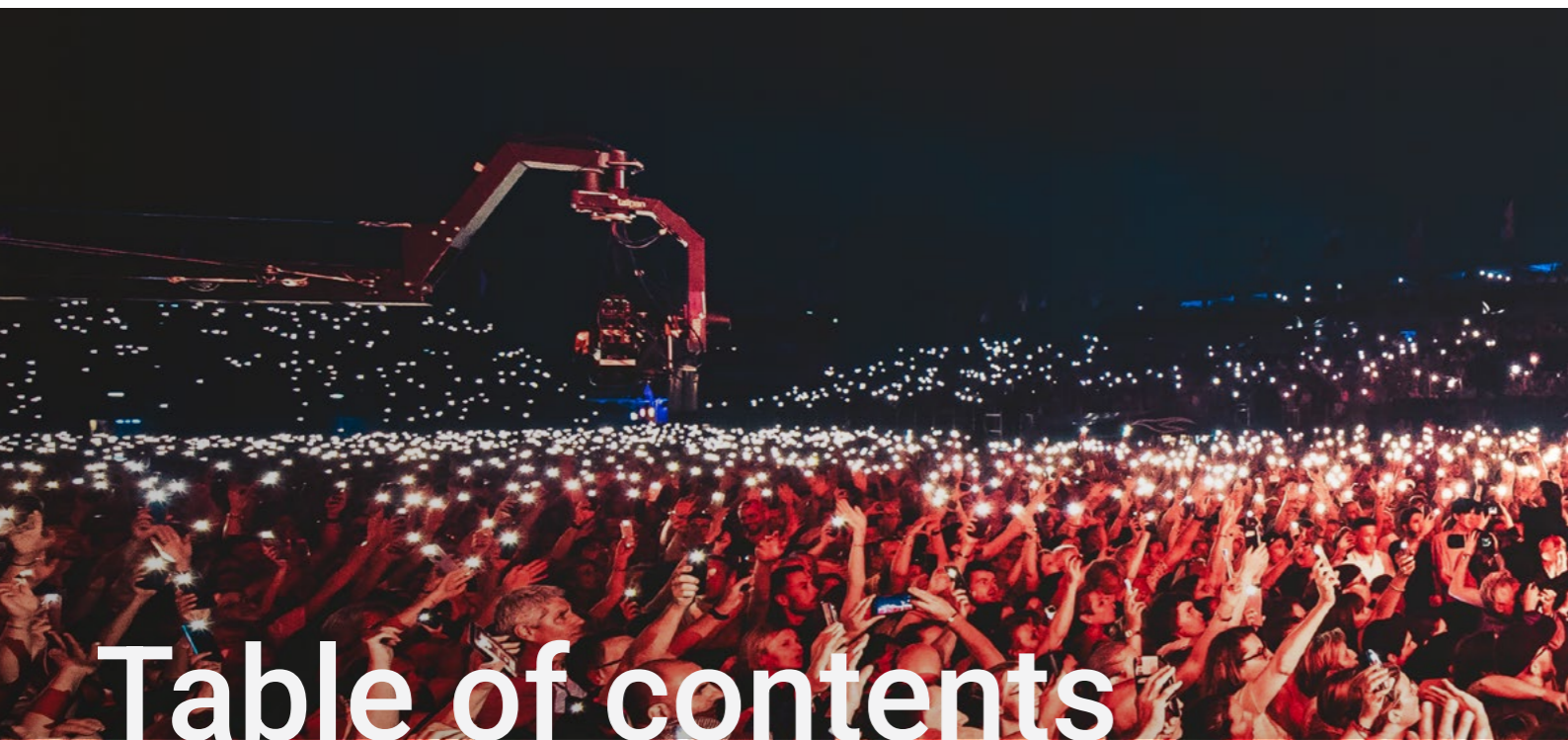


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The cover of this year's Global Collections Report visually captures the dynamic conversation that surrounds the value of creativity in the modern world. By juxtaposing Michelangelo's David—a timeless symbol of human artistic achievement—with a bold, 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.

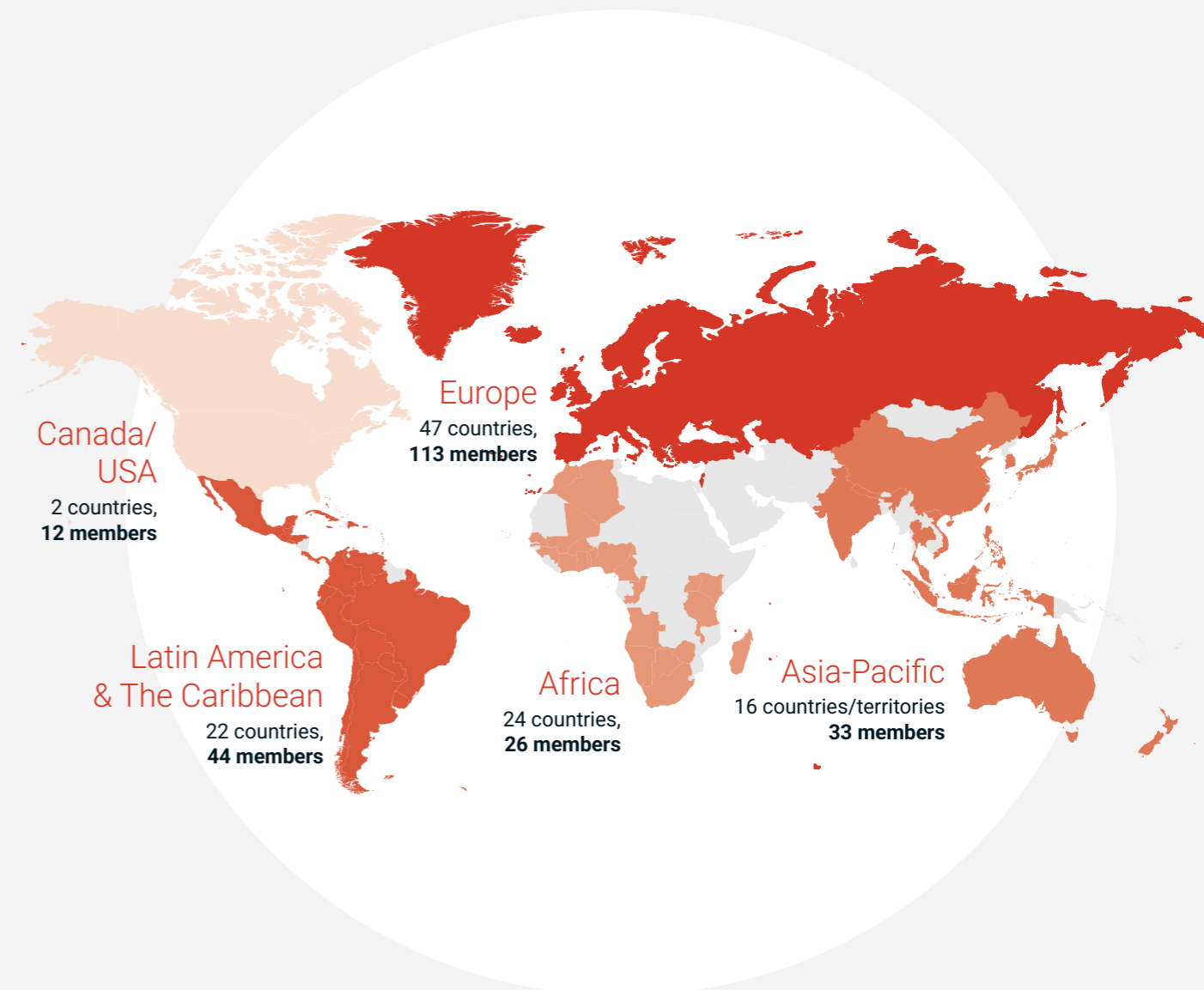
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About CISAC

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.



Music highlights at a glance

Digital growth powers EUR12.59bn global music royalties for creators

Over the past decade, global music collections have grown by more than two-thirds. In 2024, royalties earned by music creators around the world rose by +7.2%, reaching a record EUR12.59bn. A +10.8% 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. Together, digital and live & background now make up two-thirds of the total music market.



+7.2% annual growth in 2024, pushing worldwide music collections to an all-time high of

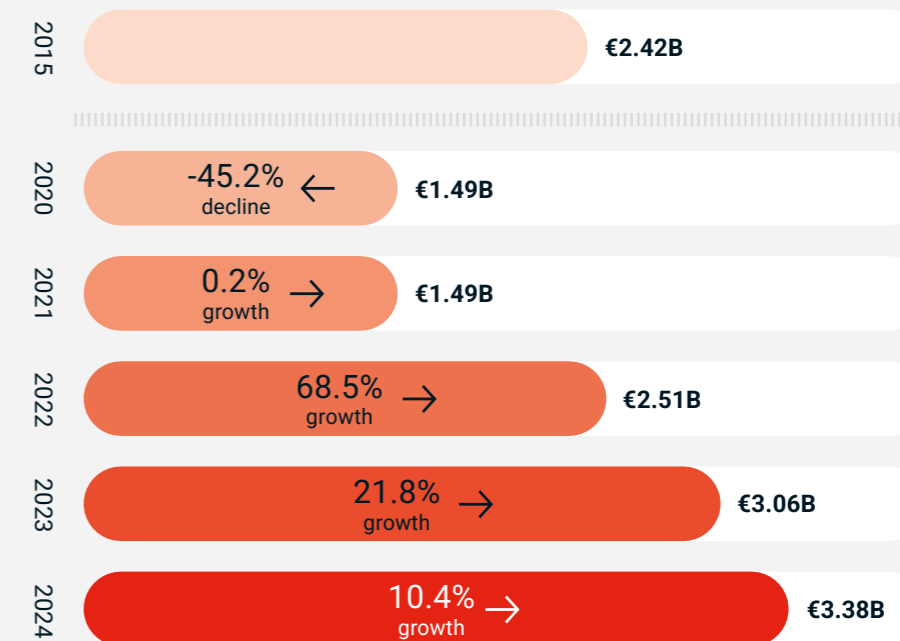
€12.59B

Live & background music royalties surpass EUR3.3bn in third year of growth

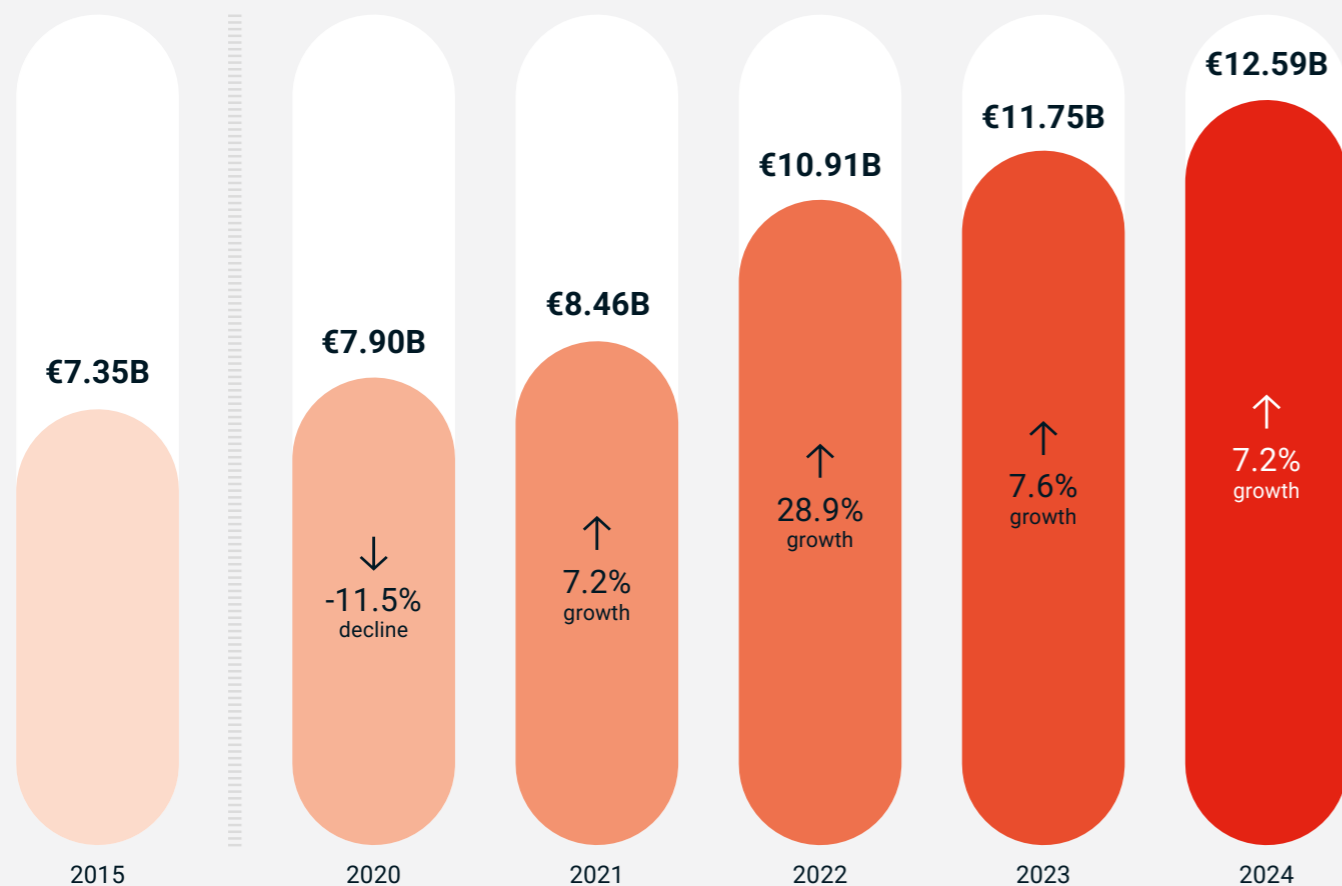
Live & background music revenues rose by +10.4% in 2024 to exceed EUR3.3bn for the first time, assisted by more live events and higher ticket prices. This income is generated through the use of creators' works at live events and concerts, as well as licensing fees from hotels, restaurants and retail outlets that play music at their businesses.

The total was more than one-third above 2015 levels and about one-quarter higher than the pre-pandemic peak. The strongest growth came from Central & Eastern Europe and Africa, which rose by 17.9% and +10.0% respectively.

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



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

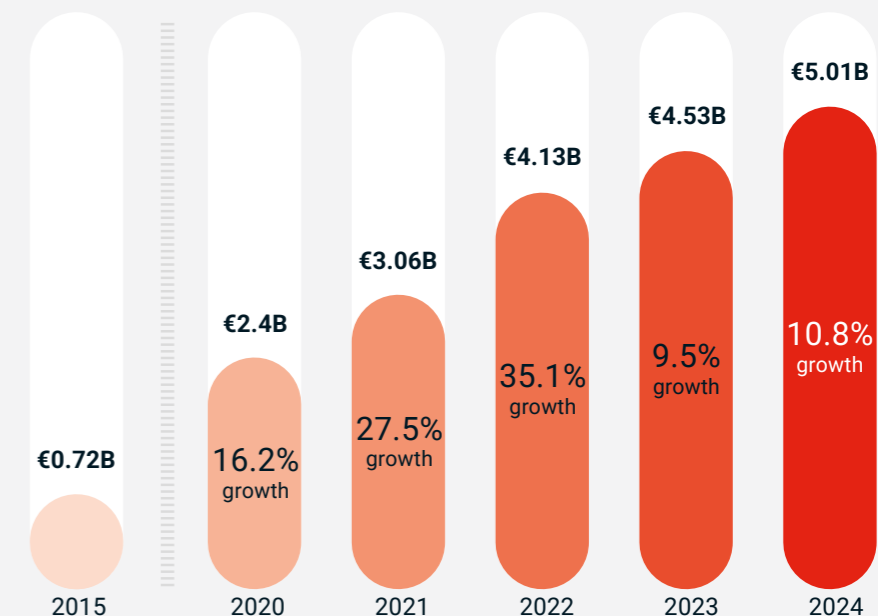


Streaming surges: Global digital music collections top EUR5bn

Digital revenues from audio streaming and subscriptions grew by +10.8% 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 music revenues. Growth in these countries alone added over EUR300m to the 2024 total.

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



Western Europe holds half the market; Central & Eastern Europe posts fastest growth

Western Europe was the largest music collection region globally, pulling in EUR6bn while growing by +6.6%, accounting for nearly half of the global market at 47.5%. Nearby, Central & Eastern Europe delivered the highest growth rate of all regions, climbing +17.9% to EUR471m and representing 3.7% of the overall total. This was driven by robust digital growth (+20.2%), supported by improved licensing conditions and closer cooperation with pan-European licensing bodies.

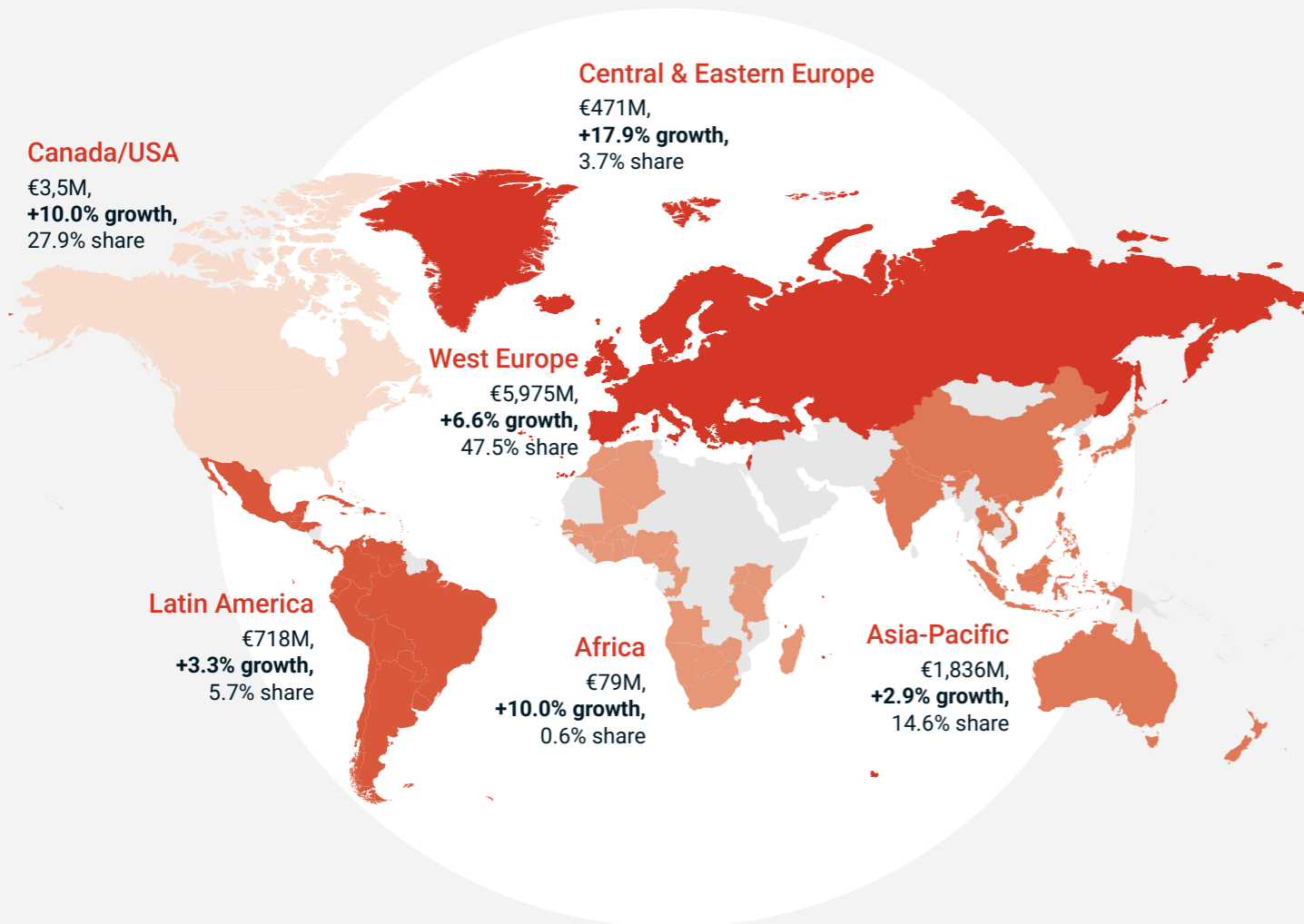
Music collections in Canada and the USA reached EUR3.5bn, a +10.0% increase that now represents 27.9% of the global total. Asia-Pacific reported steady progress with EUR1,836m in collections, up +2.9% and making up 14.6% of the market. Latin America advanced by +3.3% to EUR718m, contributing 5.7% of the global share. Africa, while it is currently the smallest collecting region at EUR79m (0.6% share), matched North America's growth pace with a +10.0% rise, underlining its emerging potential.



17.9%

growth in Central & Eastern Europe – the fastest-rising region globally.

Share and growth of music collections by region (EUR million)



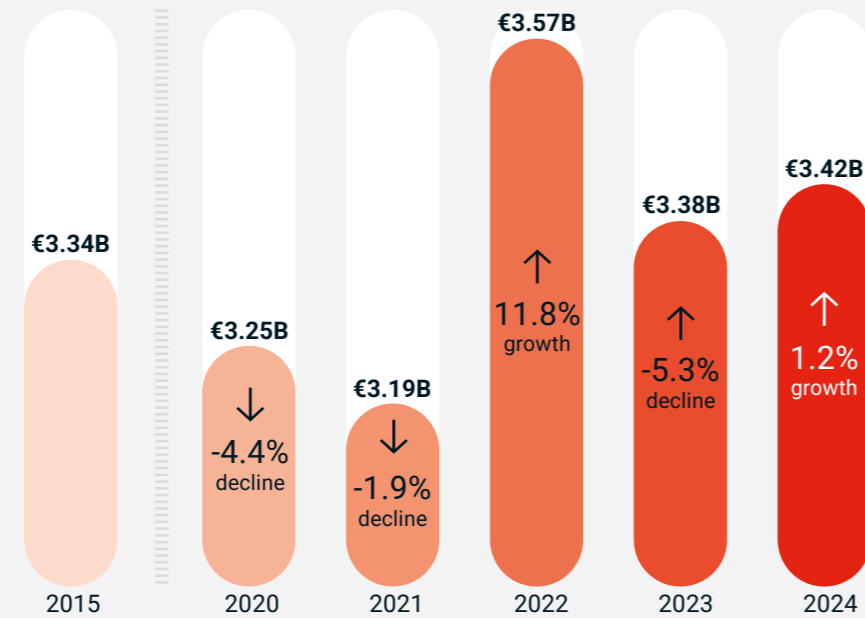
The International Mieczysław Karłowicz Composers' Competition took place in Szczecin, Poland in November 2024

TV & radio music revenues edge upward amid shifting listening habits

Broadcast income returned to growth in 2024, increasing by +1.2% after a -5.3% 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%, +2.6% and +13.7% respectively, contributing over EUR60m to the global total. Despite this recent rebound, overall TV & radio music revenues have grown by just +2.3% since 2015.

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



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

All of the world's largest collecting markets reported growth in 2024. Together, these markets saw a combined increase of +7.2%. This group of ten markets also accounted for slightly more than three-quarters of the global music collections total and 76.4% of global music collections growth, reinforcing their dominant role in the international collections landscape.

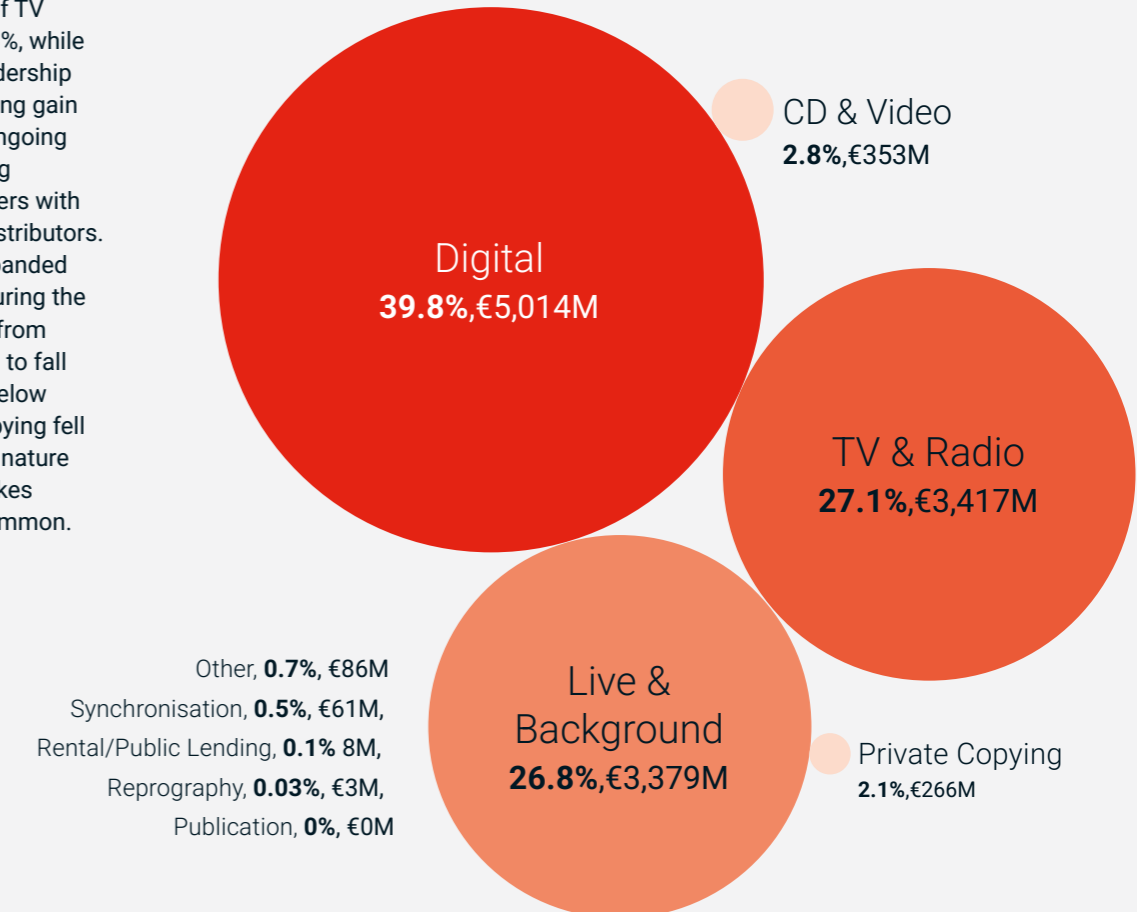
Music collections per country/territory (EUR million) and growth in 2024

Country/Territory	Collections	% Growth 2024	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%
Top 10 Total	€9,619M	+7.2%	+72.6%	+56.3%
Global Total	€12,587M	+7.2%	+71.2%	+59.4%

Digital extends lead despite broadcast return to growth

In 2024, the market share of TV and radio contracted by 1.6%, while digital strengthened its leadership position with a corresponding gain of 1.3%. This reflected the ongoing consumer trend of replacing traditional linear broadcasters with on-demand subscription distributors. Live & background also expanded its share, rising by +0.8% during the year. Conversely, revenues from physical formats continued to fall with the total now -37.7% below the 2015 figure. Private copying fell by -4.3%, 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 music revenue continued to account for the highest share of smaller global markets, with the top six—Mali, Vietnam, India, Indonesia, Philippines and Nepal—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 44.4%, 43.3% and 49.8% respectively.

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

Country/Territory	Market share 2024	Growth 2024	vs 2015	vs 2020
Mali	91.5%	+8.0%	-	+2477.6%
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%	+9101.9%	+374.7%
Nepal	78.2%	+26.7%	+21513.2%	+236.4%
Mexico	69.4%	+8.4%	+3201.0%	+155.6%
Thailand	69.1%	+13.6%	+5523.0%	+39.0%

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.





CISAC

International Confederation
of Societies of Authors
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