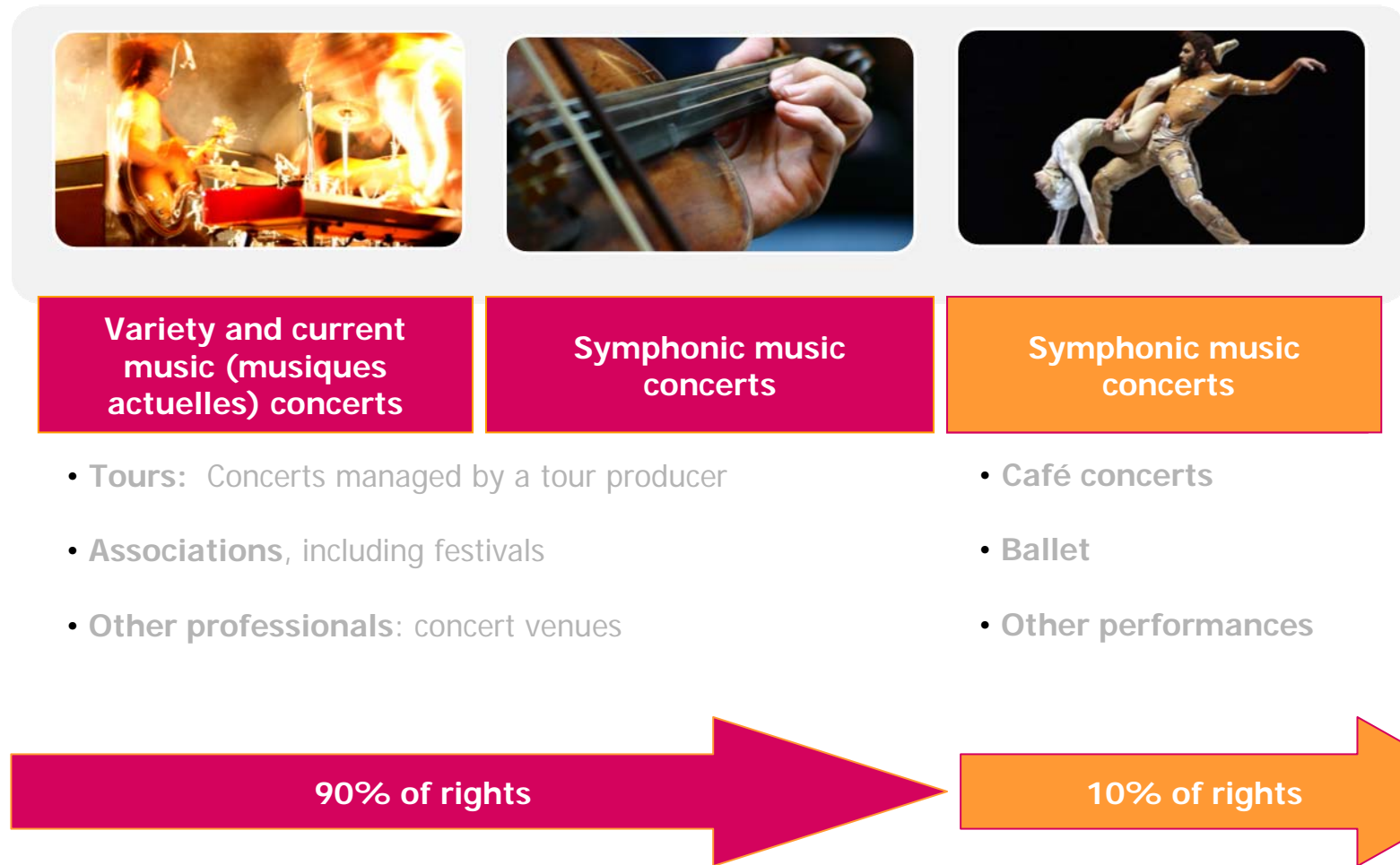




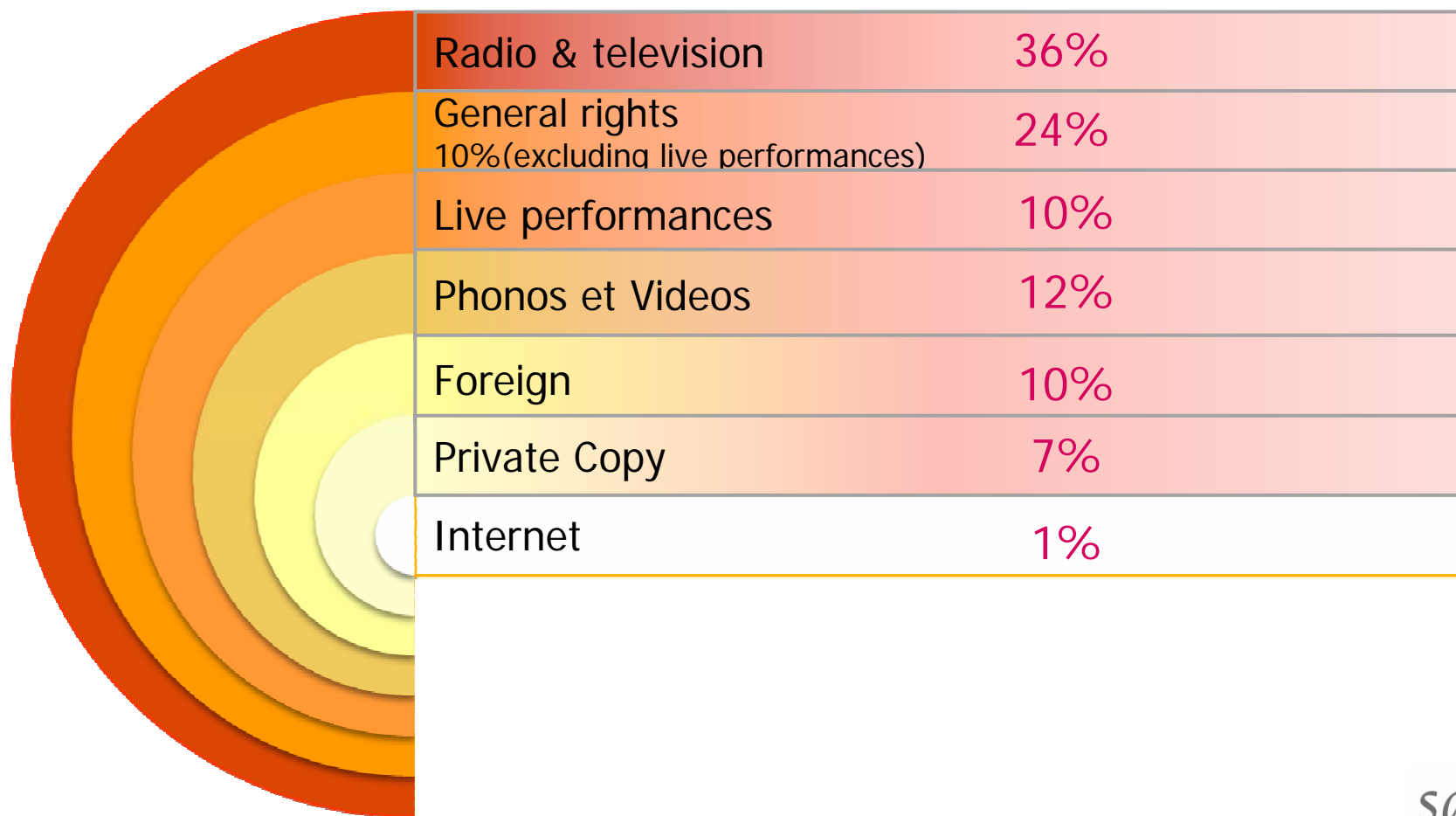
Live entertainment in France in 2009
Overview and prospects
Sacem

I. Authors' Rights from live entertainment

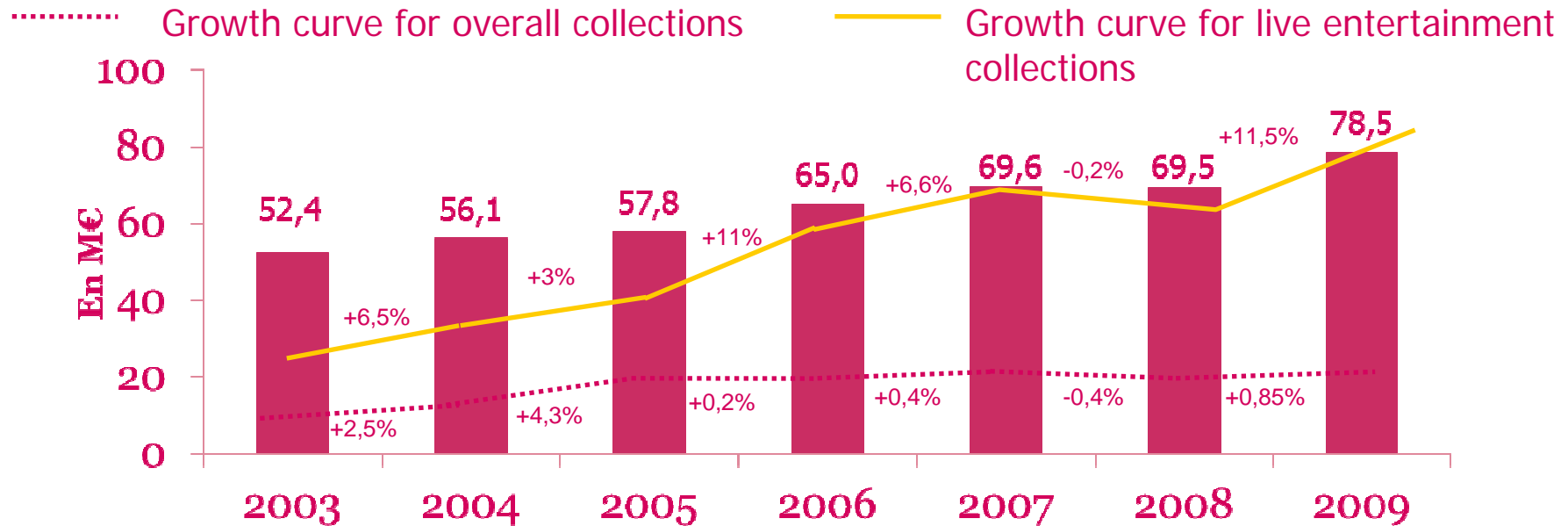
Live entertainment: definition



The place of live entertainment in SACEM's overall collections in 2009

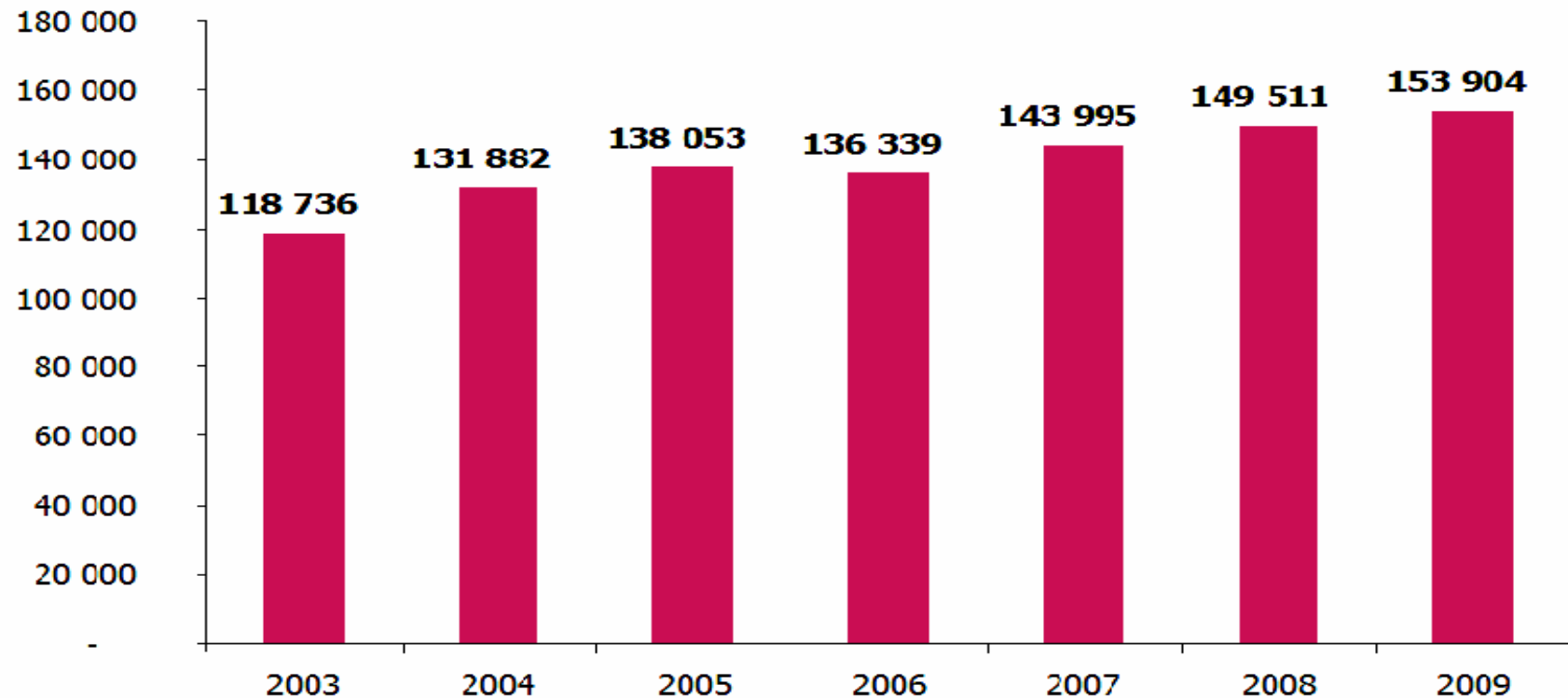


Evolution of overall collections since 2003



- Since 2003, **regular growth** in value, more rapid than overall collections
- The share of live performances in overall rights rose from 7.3% in 2003 to 10.3% in 2009

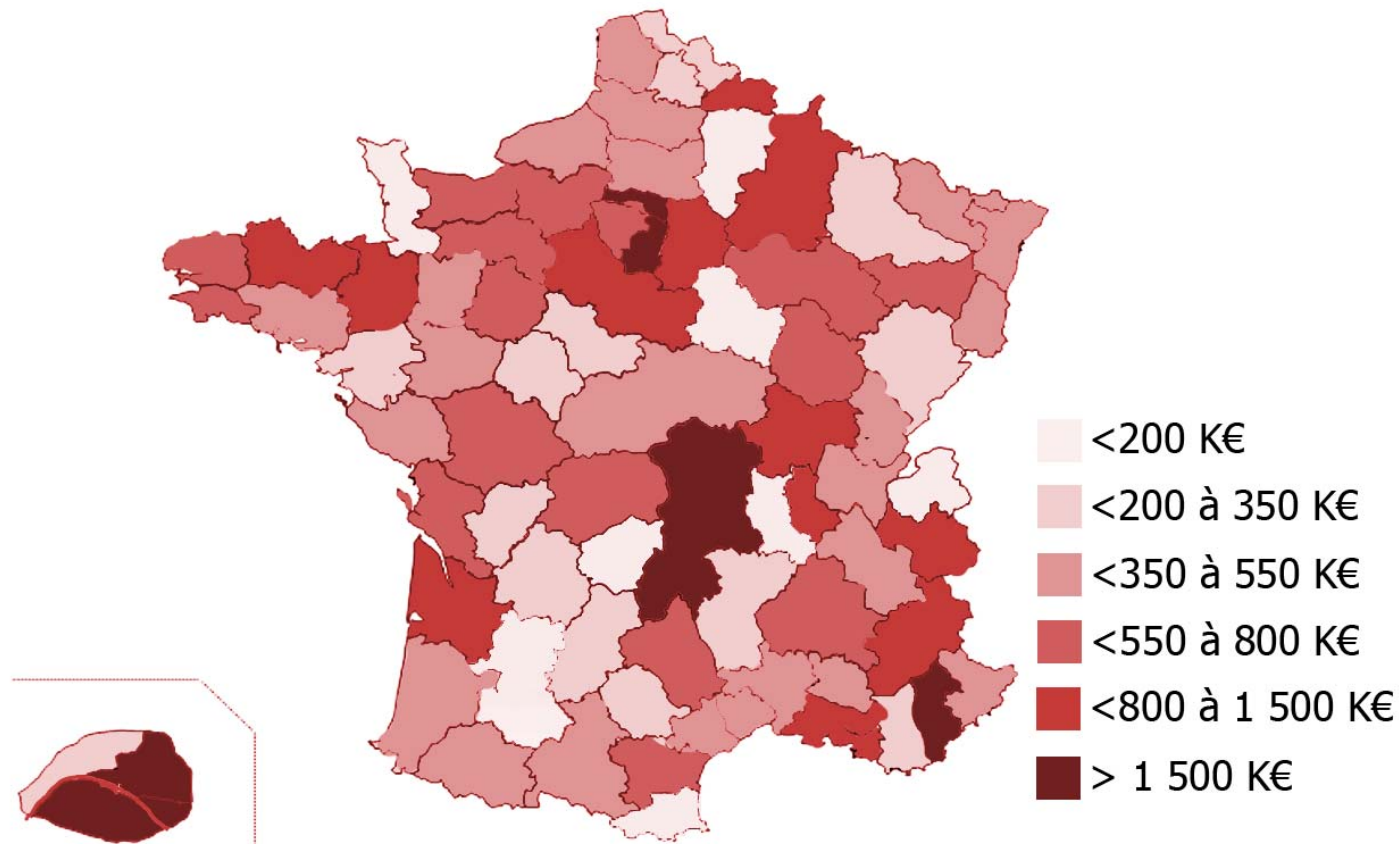
Evolution of the number of live entertainment performances



- Dynamism explained in particular by the growing number of performances: +23% from 2003 to 2009

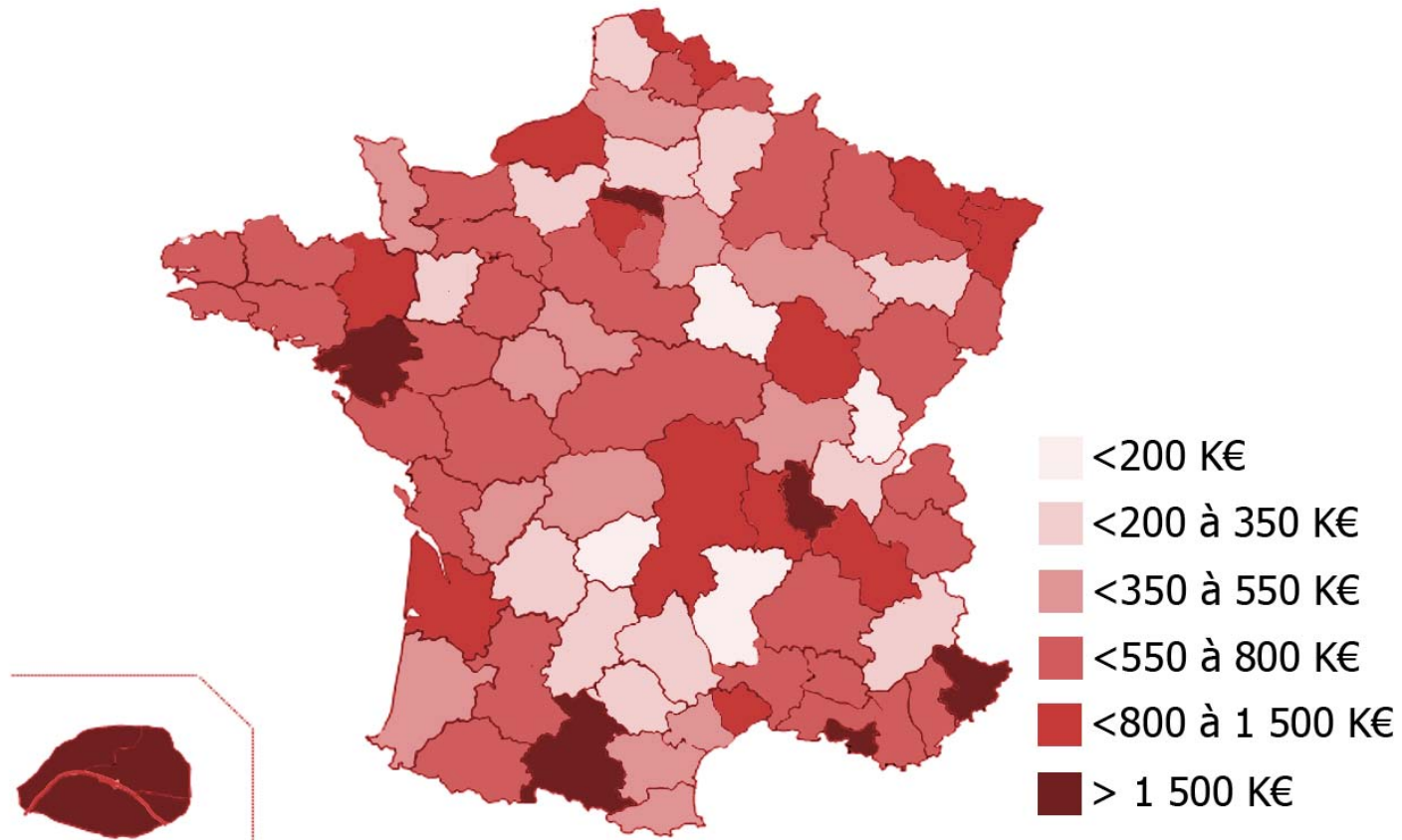
II. Authors rights from live entertainment performances : geographic distribution

Authors rights from live entertainment performances in 2006



- Strong dynamism in the Parisian, North, Normandy, Loiret, Lyon, Nice, East Regions

... and in 2009

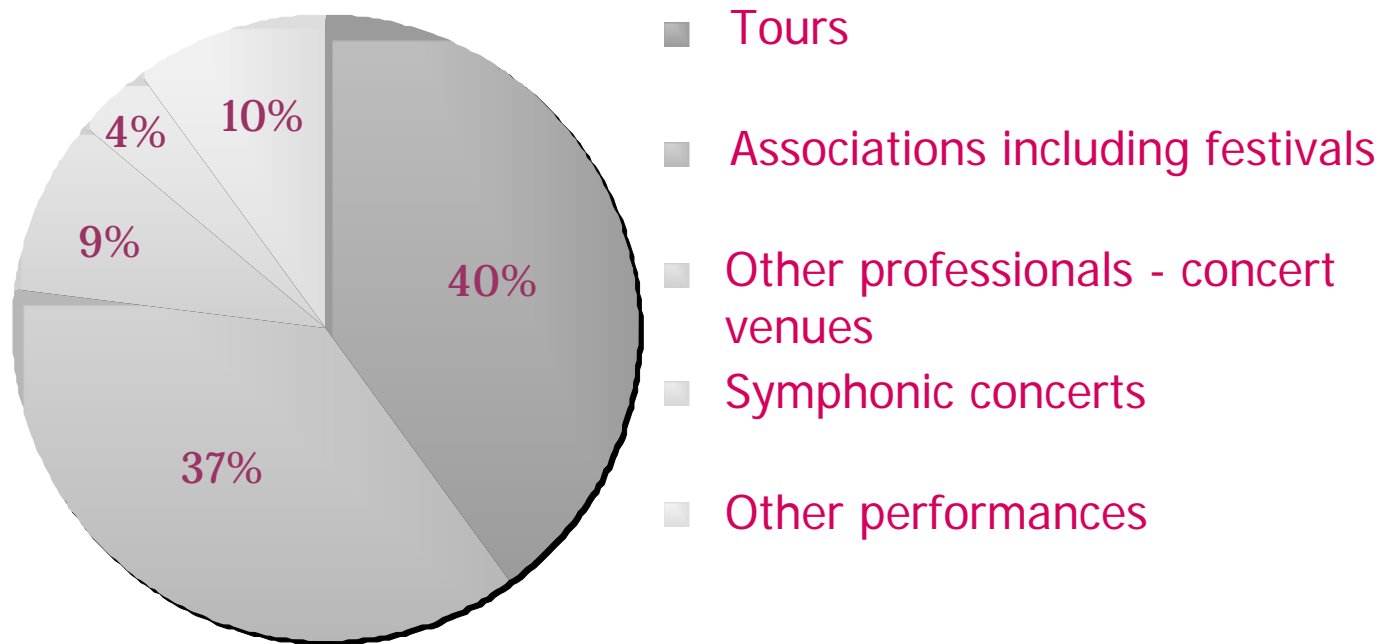


- Increasing dynamism in most territories

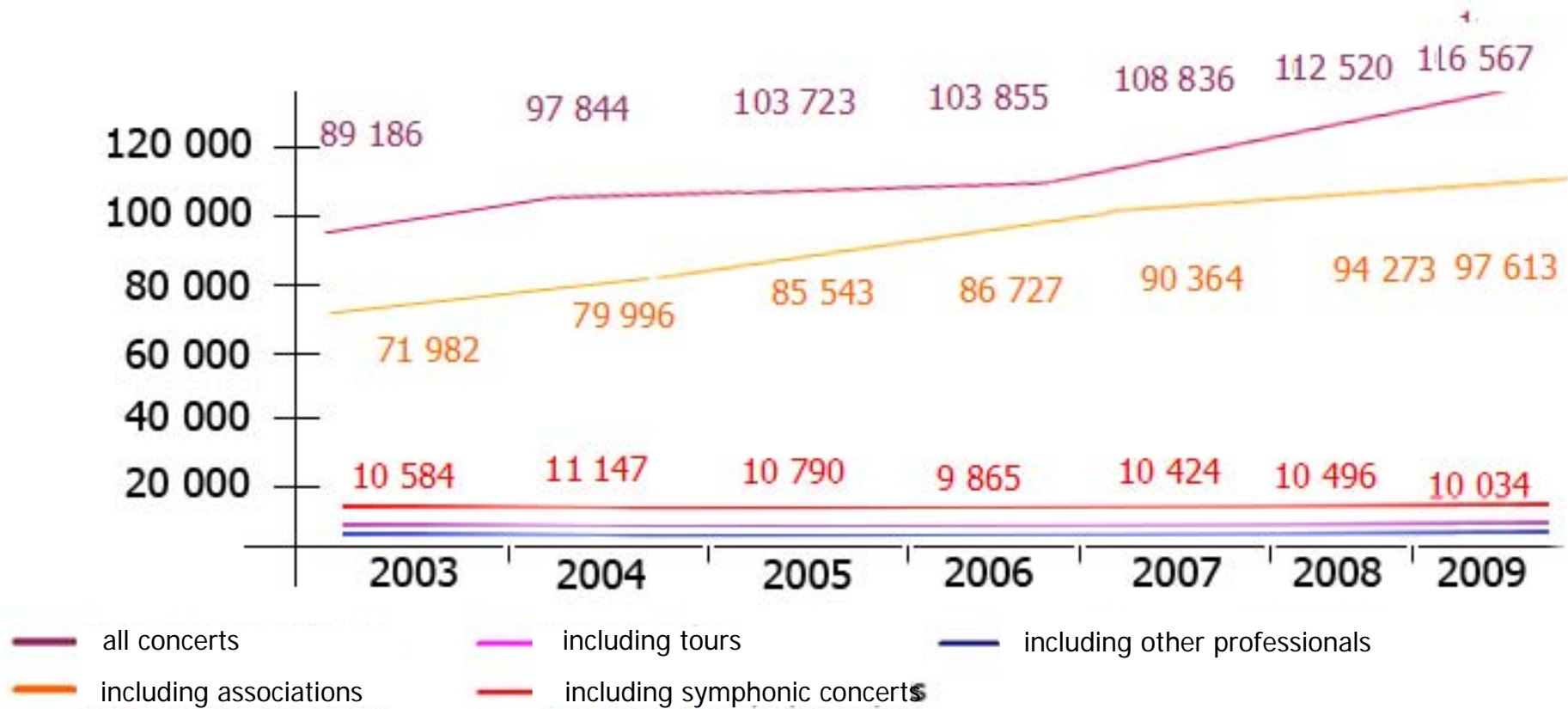
III. Focus on concerts

Concerts represent 90% of authors rights collected for live entertainment in 2009

Figures 2009

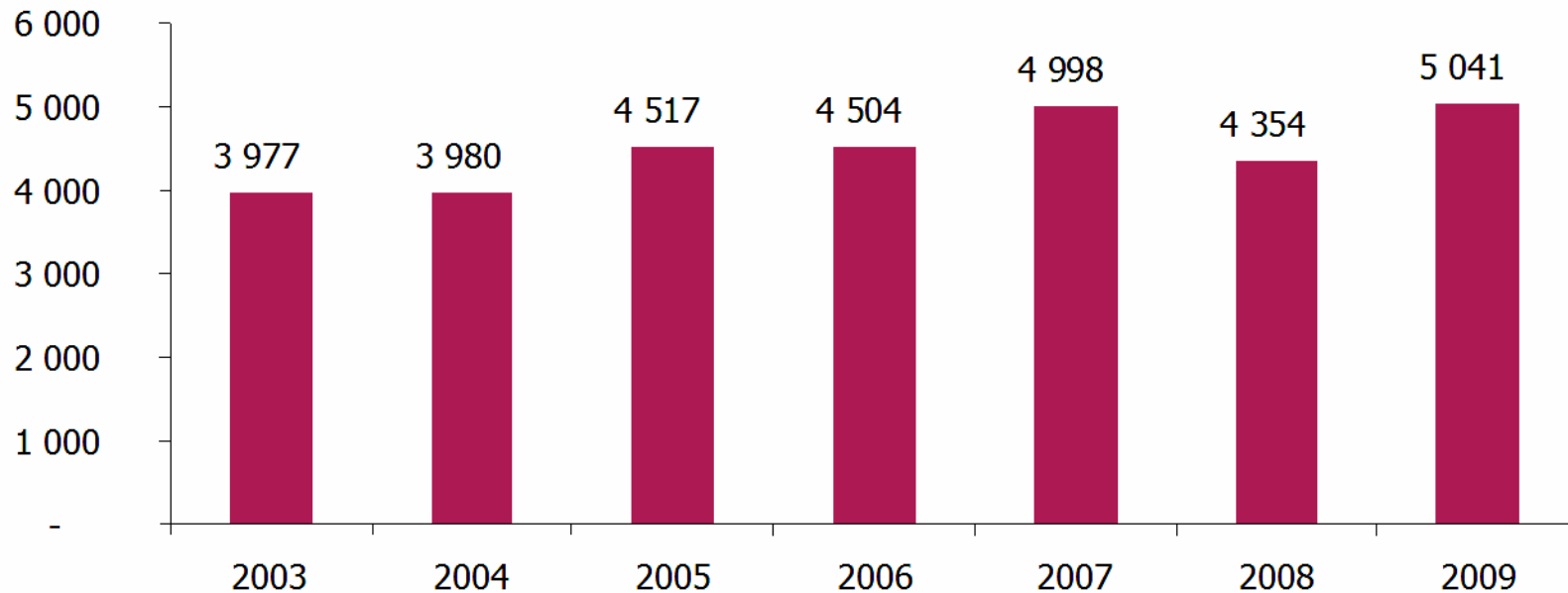


Numbers of seances



- In 2009, concerts represented 75% of live entertainment performances identified
- We can note the importance of the “associations” category, including festivals: 97,613 performances, **84% concerts** in 2009

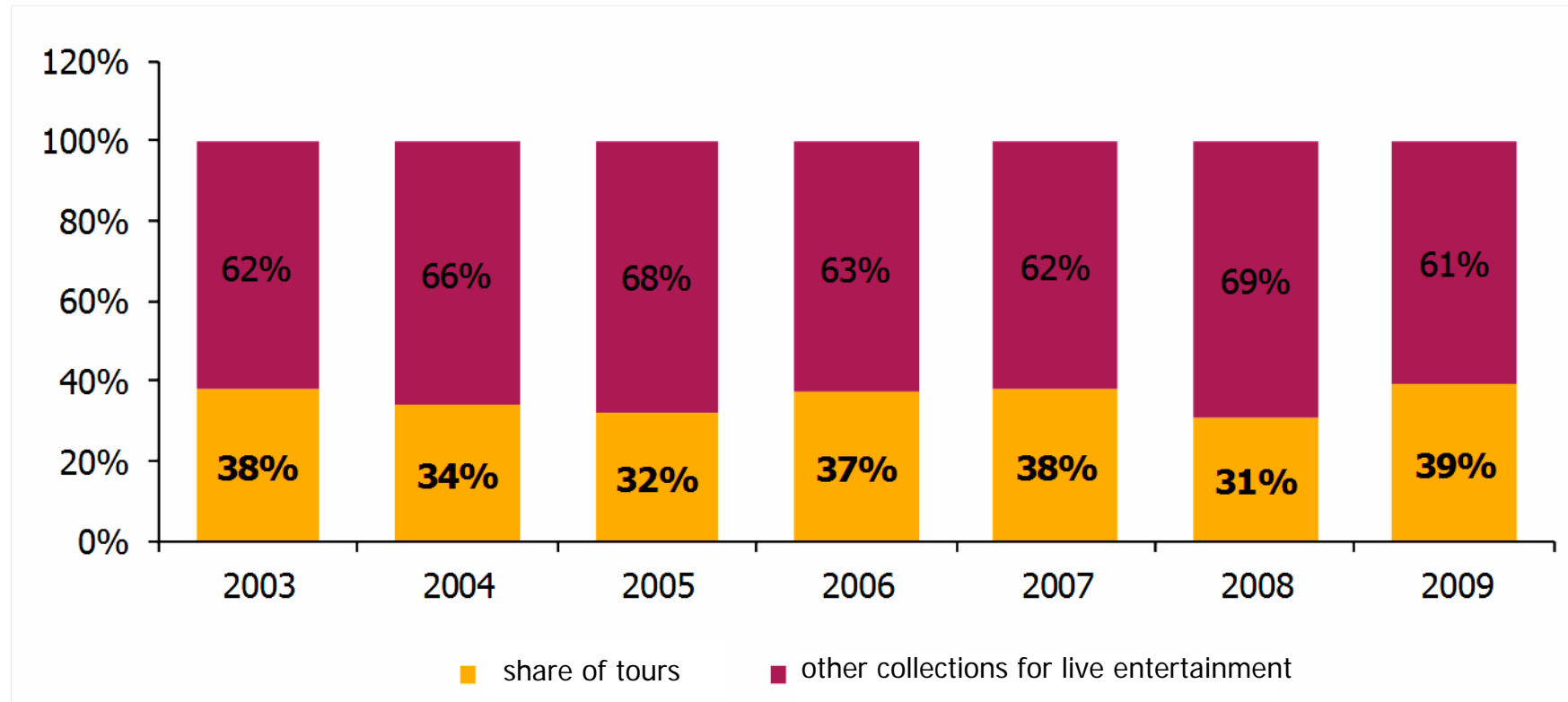
Focus on tours: few performances...



■ number of performances

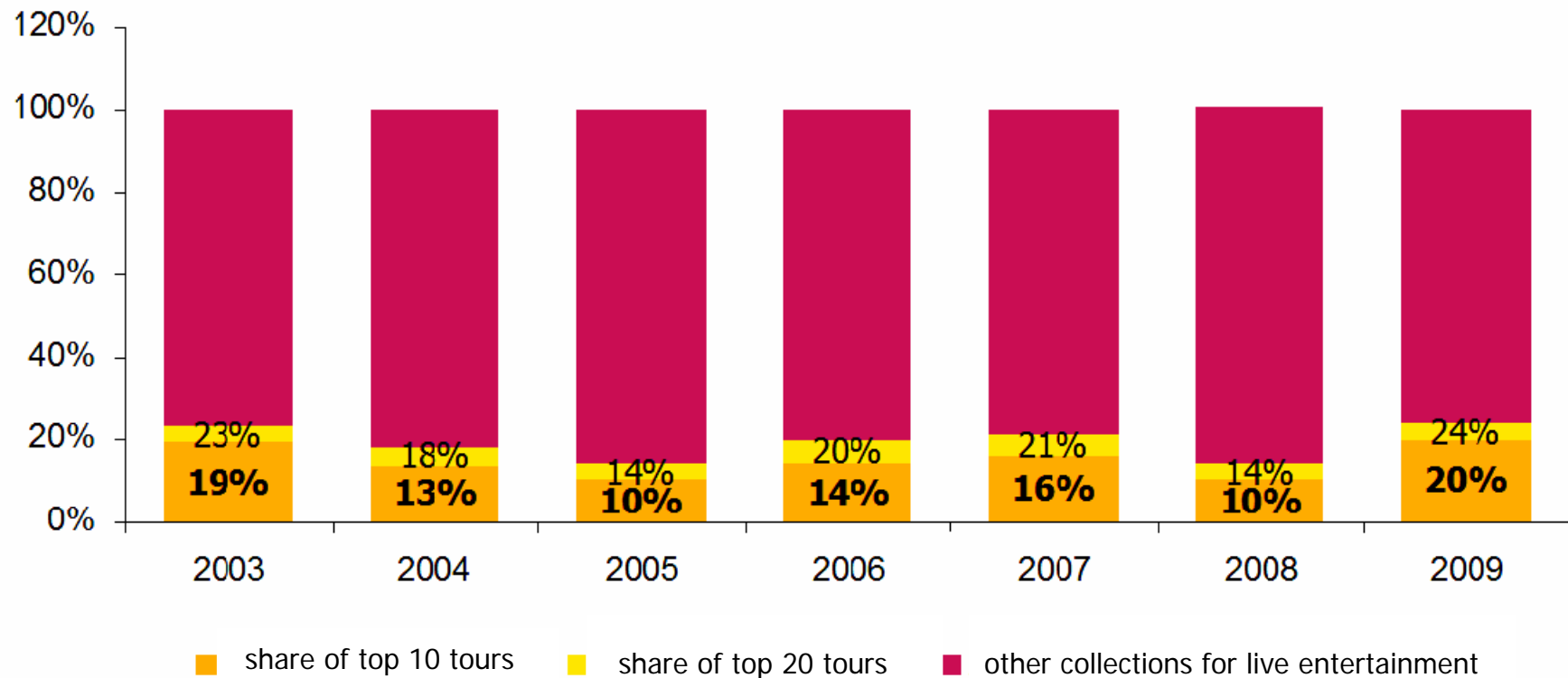
- There were few performances, especially compared to the nearly 100,000 performances in the sector of associations/festivals
- Tours represent **3% to 4% of total** live entertainment **performances** according to the year

... but considerable economic importance



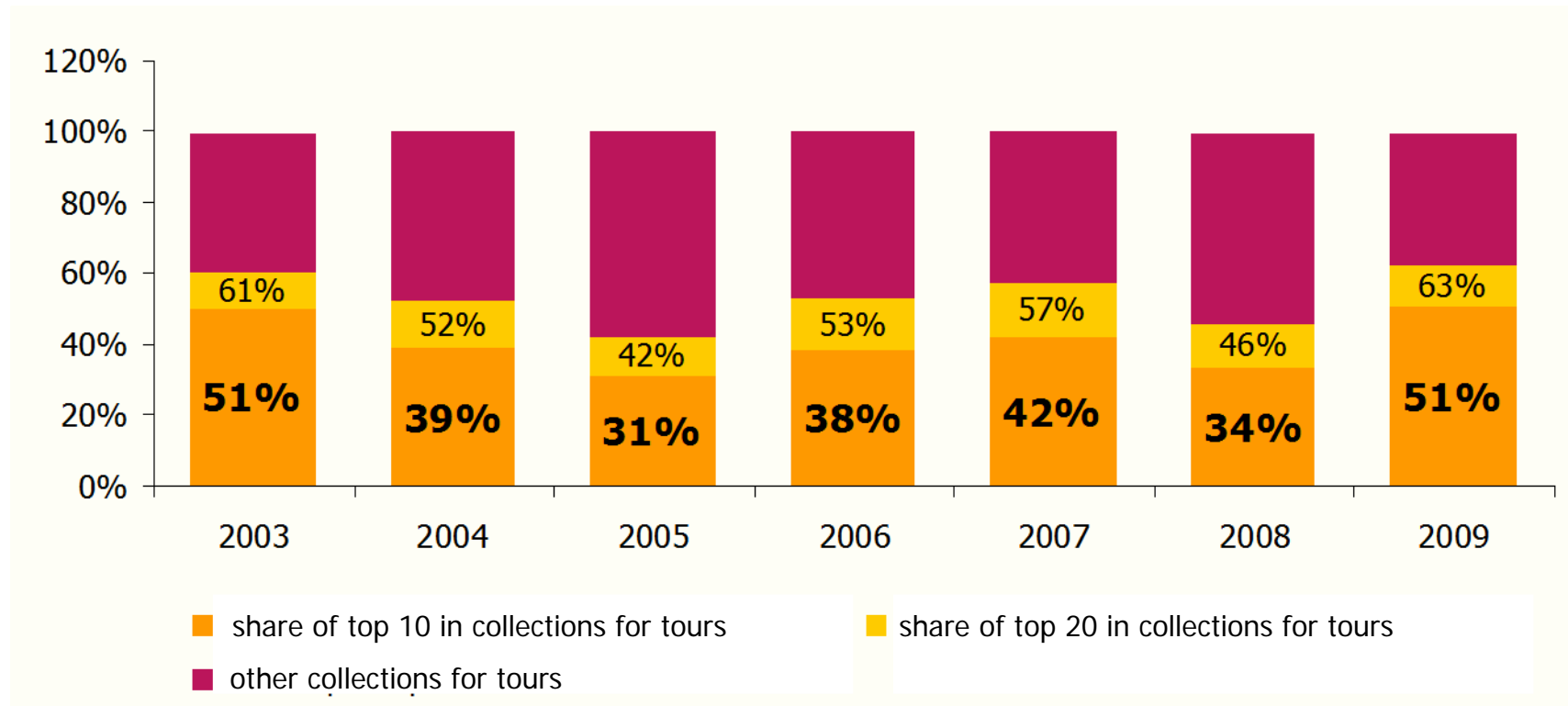
- Although they represent only 3-4% of the number of performances, tours generate from **one-third to nearly 40%** of total revenue from live entertainment

The share of the top 10 and 20 tours with respect to all live entertainment



- Notable concentration, the top 20 tours can represent **a quarter** of revenue from live entertainment

The share of the top 10 and 20 tours in the total revenue from tours



- Share of top 10 in collections for tours, share of top 20 in collections for tours, other collections for tours
- Beyond the concentration...
- ... strong fluctuations in revenue that emphasise the erratic nature of live entertainment

Evolution of the top 20 tours

2003

Johnny HALLYDAY
RENAUD
STAR ACADEMY
ROLLING STONES
Laurent GERRA
Florent PAGNY
Pascal OBISPO
Eddy MITCHELL
Ben HARPER
LORIE
Patrick BRUEL
David BOWIE
JENIFER
André RIEU
INDOCHINE
Bruce SPRINGSTEEN
PLACEBO
MUSE
Eros RAMAZOTTI
Peter GABRIEL

2005

Michel SARDOU
U2
Franck DUBOSC
CALOGERO
STAR ACADEMY
Gérald DE PALMAS
Francis CABREL
Laurent GERRA
Florent PAGNY
TRYO
Yannick NOAH
Elie SEMOUN
KYO
Mathieu CHEDID
SNOOP DOGG
André RIEU
Julio IGLESIAS
Joe COCKER
RAMMSTEIN
COLDPLAY

2007

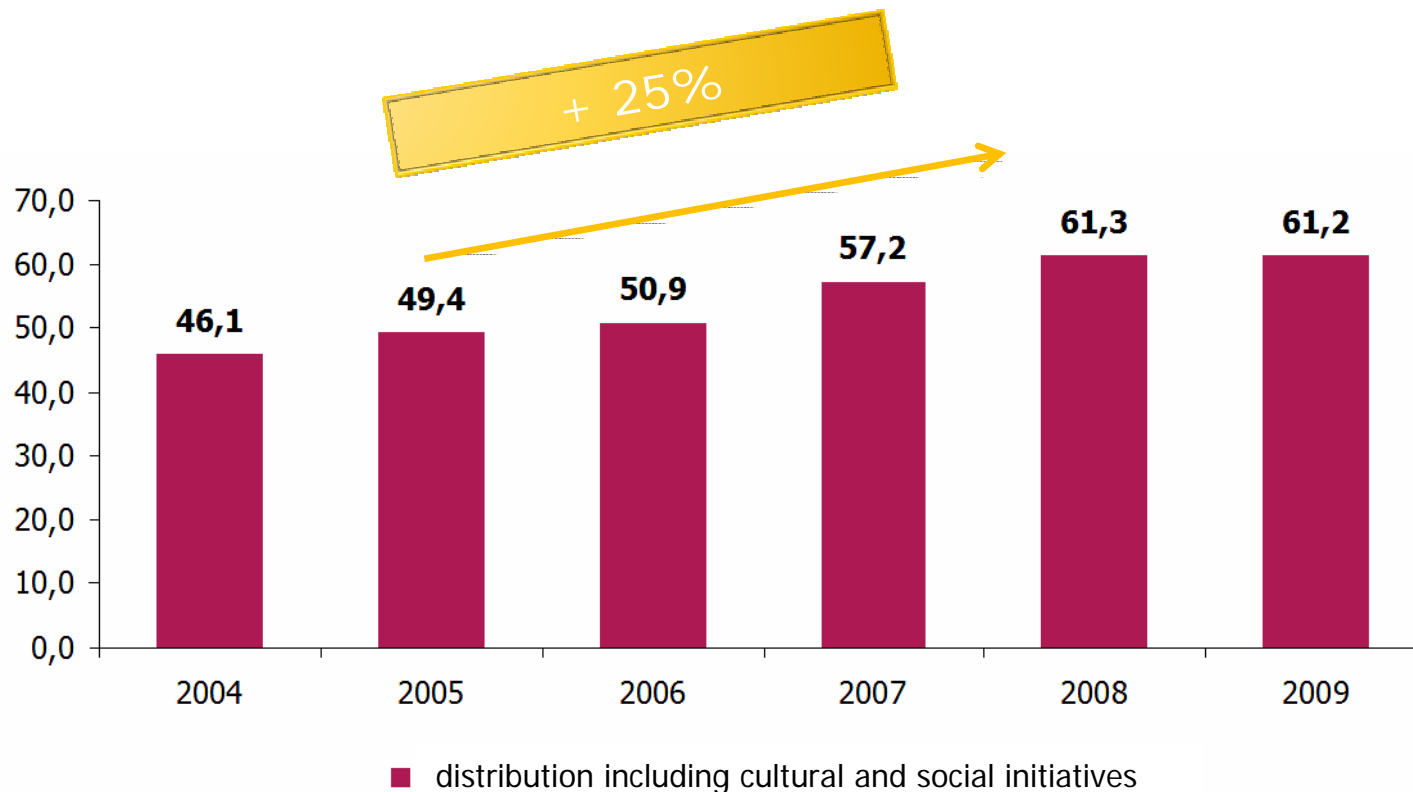
Michel POLNAREFF
LE ROI SOLEIL
Yannick NOAH
AGE TENDRE ET TETES DE BOIS
Michel SARDOU
POLICE
Johnny HALLYDAY
Charles AZNAVOUR
RENAUD
Eddy MITCHELL
Pascal OBISPO
ROLLING STONES
Patrick BRUEL
GENESIS
HOLIDAY ON ICE "MYSTERY"
Vanessa PARADIS
RFM PARTY 80
TOKIO HOTEL
MUSE
DEEP PURPLE

2009

Johnny HALLYDAY
Mylène FARMER
CLEOPATRE
U2
AGE TENDRE & TETES DE BOIS
MOZART L'OPERA ROCK
AC/DC
Franck DUBOSC
BENABAR
TRYO
INDOCHINE
DEPECHE MODE
Lenny KRAVITZ
RESTOS DU CŒUR
Julien CLERC
CALOGERO
RFM PARTY 80
André RIEU
BHARATI
Tina TURNER

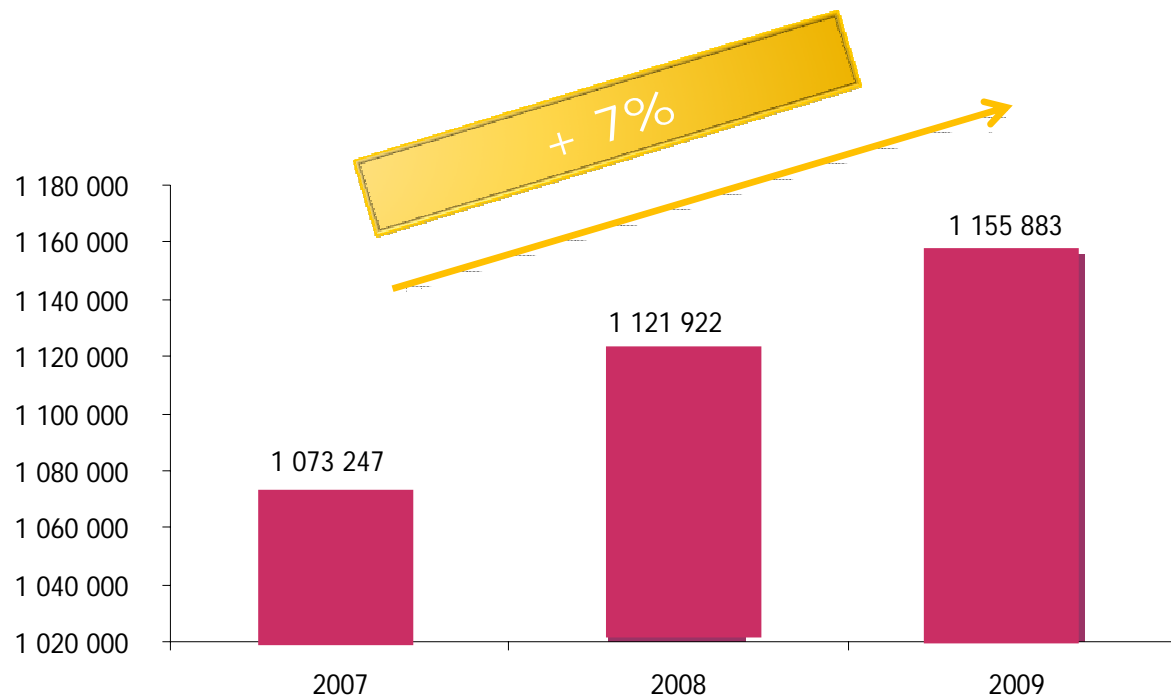
IV. Focus on distribution

Evolution of distribution



- The sums distributed increase at the same rate as collections for the same period: +25%
- Distributions are conducted in year N + 1: consolidation of distributions for 2004 concern performances in 2003

How to approach distribution for live entertainment



Step 1: Concert programmes are integrated in the IT system

The amount of processing increases regularly: **over 1.5 million** entries (one entry = one work performed in concert) were processed for distribution in 2009

Une méthodologie de la précision

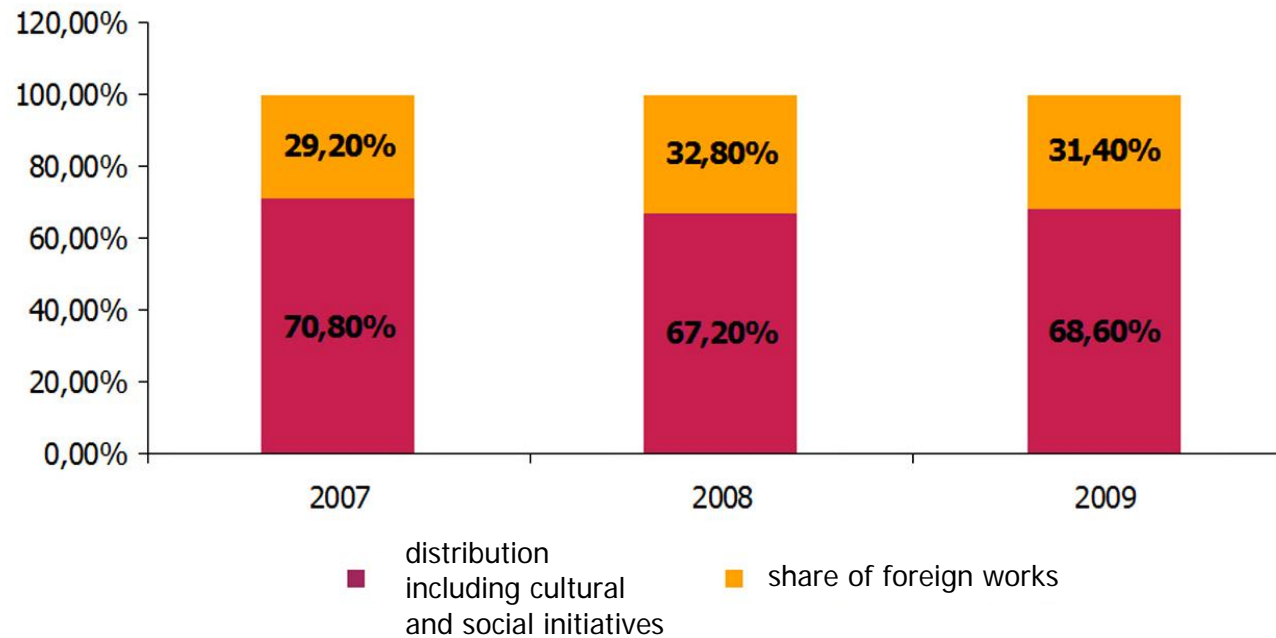
Step 2: Identification of works

Step 3: Assignment of sums for each work performed

Step 4: For each work, sharing of rights among author(s), composer(s) and publishers

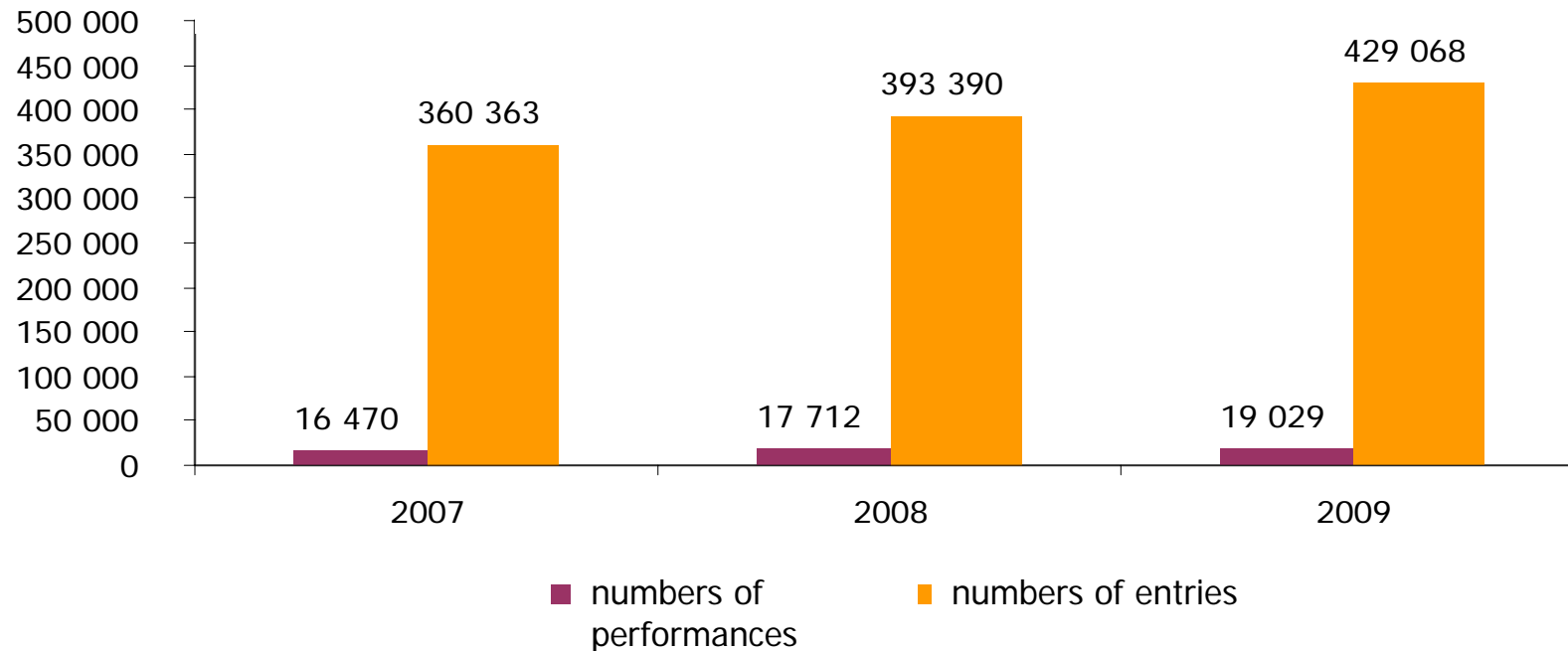
For variety and *musiques actuelles* concerts
268,000 different titles gave rise to
distribution every year
on average from 2007 to 2009

The French repertoire remains dynamic



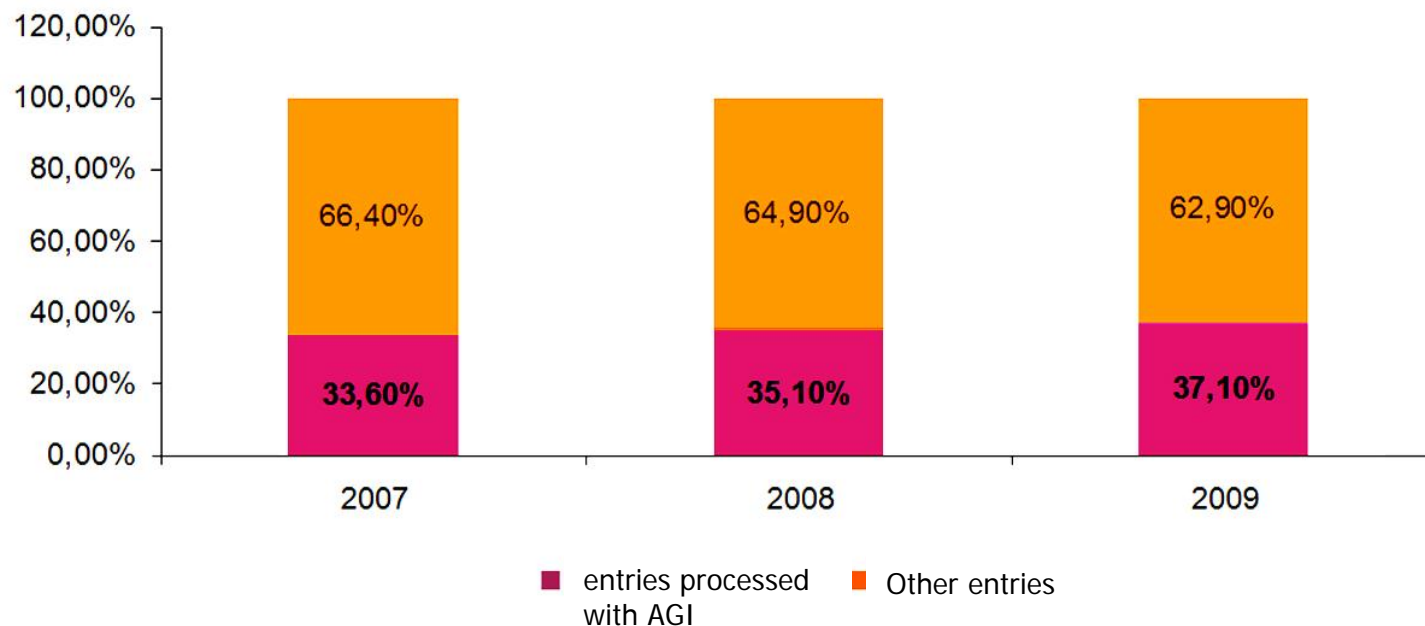
- The share of works from the French and foreign repertoires in distribution (variety and *musiques actuelles*)

Focus on authors-composers-performing artists



- On 1 January 2010 > **9,102 members** declared as authors-composers-performers (ACP):
7% of SACEM **creative membership**
- In live entertainment, this category is **constantly growing, both for the** number of performances declared (+14%) and for the lines [entries] to be processed (+16%)

An increasingly significant share in live entertainment



- In the area of variety and *musiques actuelles*, programmes processed using the ACP format there is an increase in their share of total distribution
- In 2009, the amounts distributed to ACPs represented 14% of the total sums for live entertainment, **exceeding €8m**

Broadcasting a 3 minutes song

- How much receive rights holders, when 100 listeners ?

Broadcasting on TV, prime time



Les Années bonheur- audience
5 M

**€ 0.4 when 1000
teviewerer**



La Nouvelle Star – audience 4 M
**€ 0.15 when 1000
teviewerer**

Broadcasting on radio



**€ 0.005
When 1000 listeners**



**€ 0.006 when 1000
listeners**



**€ 0.02 when 1000
listeners**

Broadcasting on concert

U2, Stade de France
First category > 299 €
€1600 when 1000 spectators

Bercy, Lady Gaga
First category > 149 €
€800 when 1000 spectators

Olympia, Lynda Lemay
First category > 55 €
€300 when 1000 spectators

Coopérative de Mai, B.Biolay €28
€150 when 1000 spectators

Conclusion



Live entertainment accounts for 10% of total Sacem collections.

This sector is very representative of our core business, with a network collecting rights over the entire territory.

For the entire sector in 2009: over 150,000 performances giving rise to collections, 8,500 subscribers, 1.5 million entries processed and nearly 274,000 different titles benefiting from distribution.



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Thank you

sacem 

Studies

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