

# COPYRIGHT INDUSTRIES in the U.S. Economy



## The 2016 Report

By Stephen E. Siwek  
Economists Incorporated

Prepared for the  
International Intellectual Property Alliance®

*Copyright Industries in the U.S. Economy: The 2016 Report* is the sixteenth report on the U.S. copyright industries prepared for the International Intellectual Property Alliance (IIPA) since 1990.

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- Stephen E. Siwek and Harold Furchtgott-Roth, *Copyright Industries in the U.S. Economy* (released in November 1990)
- Stephen E. Siwek and Harold Furchtgott-Roth, *Copyright Industries in the U.S. Economy: 1977-1990* (released in September 1992)
- Stephen E. Siwek and Harold Furchtgott-Roth, *Copyright Industries in the U.S. Economy: 1993 Perspective* (released in October 1993)
- Stephen E. Siwek and Harold Furchtgott-Roth, *Copyright Industries in the U.S. Economy: 1977-1993* (released in January 1995)
- Stephen E. Siwek and Gale Mosteller, *Copyright Industries in the U.S. Economy: The 1996 Report* (released in October 1996)
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- Stephen E. Siwek, *Copyright Industries in the U.S. Economy: The 2003-2007 Report* (released in July 2009)
- Stephen E. Siwek, *Copyright Industries in the U.S. Economy: The 2011 Report* (released in November 2011)
- Stephen E. Siwek, *Copyright Industries in the U.S. Economy: The 2013 Report* (released in November 2013)
- Stephen E. Siwek, *Copyright Industries in the U.S. Economy: The 2014 Report* (released in December 2014).

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## AUTHOR’S ACKNOWLEDGEMENTS

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Formed in 1984, the IIPA is a private sector coalition of trade associations representing U.S. copyright-based industries in bilateral and multilateral efforts working to improve international protection and enforcement of copyrighted materials and open up foreign markets closed by piracy and other market access barriers. IIPA’s five member associations represent over 3,200 U.S. companies producing and distributing materials protected by copyright laws throughout the world—all types of computer and video games for video game consoles, personal computers, and the Internet; theatrical films, television programs, DVDs and home video and digital representations of audiovisual works; music, records, CDs, and audiocassettes; and fiction and non-fiction books, education instructional and assessment materials, and professional and scholarly journals, databases and software in all formats. Visit [www.iipawebsite.com](http://www.iipawebsite.com). Members of the IIPA include: Association of American Publishers, Entertainment Software Association, Independent Film & Television Alliance, Motion Picture Association of America, and Recording Industry Association of America.

## PREFACE

Since 1984, IIPA and its association members –producers and distributors of movies, music, videogames, and books and journals for the world – have worked in partnership with the U.S. government to improve copyright protection and provide fairer and more equitable market access in foreign markets. These efforts have resulted in significant improvements in copyright laws and enforcement around the world, and in the lowering of market access barriers that have made it more difficult for creators to compete on a level playing field in global markets. These improvements in turn have had a substantial positive impact over the years on how these industries contribute to the U.S. economy, in terms of overall contribution, employment and wages, and foreign sales and exports, thereby benefiting millions of individuals and enterprises in the United States.

To quantify the contribution of the copyright industries, IIPA commenced a series of economic studies in 1990. *Copyright Industries in the U.S. Economy: The 2016 Report*, the sixteenth such report, by Stephen E. Siwek of Economists Incorporated, covers the period 2012-2015. This *Report* shows that the copyright industries make up an increasingly large percentage of value added to GDP; create more and better-paying jobs; grow faster than the rest of the U.S. economy; and contribute substantially to U.S. foreign sales and exports, outpacing many industry sectors. The contribution of the core copyright industries to the U.S. economy now well surpasses one trillion dollars in a single year.<sup>1</sup>

As international trade has increased and globalized, foreign governments and intergovernmental organizations such as the World Intellectual Property Organization (WIPO) have become acutely aware of the significance of

copyright industries to national economies, and the linkage to their economic growth, technological innovation, and cultural diversity. In 2003, WIPO took a critical step forward by issuing a *Guide on Surveying the Economic Contribution of the Copyright-Based Industries*. The *Guide*, developed by an experts' group which included the author of this *Report*, Stephen E. Siwek, describes methodologies for measuring the role of copyright industries in domestic economies. These methodologies have now been adapted in well over 40 countries' national reports. Subsequently, in 2015, WIPO published a revised edition of the *Guide*. The revised *Guide* referenced the many national copyright industry studies that have been released since the original *Guide* was published. The revised *Guide* also included a variety of tables and charts that quantify the extent to which WIPO principles of copyright contributions to national economies have now been adopted in national studies throughout the world. These national studies provide the economic underpinnings for efforts to reform copyright law and enforcement and to lower rates of copyright piracy.<sup>2</sup>

Despite the robust achievements of the copyright industries during the period covered in this *Report*, significant challenges remain. The copyright industries derive a growing percentage of their revenue from the digital marketplace. Problems such as online piracy and unlicensed uses of copyright materials, as well as market access and other discriminatory challenges, inhibit the growth of these markets in the U.S. and abroad. Economic reports such as this one underscore what is at stake. They provide a compelling argument for more effective legal, enforcement, and market access regimes to promote and foster the growth of the copyright industries throughout the world.

– Kevin M. Rosenbaum and Steven J. Metalitz,  
International Intellectual Property Alliance

<sup>1</sup> The “core” copyright industries are those industries whose primary purpose is to create, produce, distribute or exhibit copyright materials.

<sup>2</sup> The various national studies are described and compared in a WIPO document, *2014 WIPO Studies on the Economic Contribution of the Copyright Industries Overview*, available at [http://www.wipo.int/export/sites/www/copyright/en/performance/pdf/economic\\_contribution\\_analysis\\_2014.pdf](http://www.wipo.int/export/sites/www/copyright/en/performance/pdf/economic_contribution_analysis_2014.pdf). National studies conducted to date include the following 42 countries: Argentina (2013), Australia (2011), Bhutan (2011), Brunei (2011), Bulgaria (2011), Canada (2004), China (2009), Colombia (2006), Croatia (2007), Dominica (2012), Finland (2010), Grenada (2012), Hungary (2010), Indonesia (2013), Jamaica (2007), Jordan (2012), Kenya (2009), Korea (2012), Latvia (2004), Lebanon (2007), Lithuania (2012), Malawi (2013), Malaysia (2008), Mexico (2006), Netherlands (2009), Pakistan (2010), Panama (2009), Peru (2009), Philippines (2006), Romania (2008), Russia (2007), Singapore (2007), Slovenia (2010), South Africa (2011), St. Kitts/Nevis (2012), St. Lucia (2012), St Vincent (2012), Tanzania (2012), Thailand (2012), Trinidad and Tobago (2011), Ukraine (2008), and United States (2013).

## I. EXECUTIVE SUMMARY

*Copyright Industries in the U.S. Economy: The 2016 Report* demonstrates that the core copyright industries of the United States – those industries whose primary purpose is to create, produce, distribute or exhibit copyright materials – provide significant value added to GDP; an increasing number of high-paying jobs; real growth which outpaces the rest of the economy; and substantial foreign sales and exports, surpassing many industry sectors.

### **Copyright Industries Contribute Significantly to U.S. Gross Domestic Product (GDP)**

- In 2015, the value added by the core copyright industries to U.S. GDP reached more than \$1.2 trillion dollars (\$1,235.6 billion), accounting for 6.88% of the U.S. economy.
- In 2015, the value added by the total copyright industries<sup>3</sup> to U.S. GDP approached \$2.1 trillion (\$2,097.2 billion), accounting for 11.69% of the U.S. economy.

### **Copyright Industries Employ Millions of Workers Who Earn a “Compensation Premium”**

- The core copyright industries employed over 5.5 million workers in 2015, accounting for 3.87% of the entire U.S. workforce, and 4.57% of total private employment in the United States.
- The average annual 2015 compensation paid to core copyright workers – \$93,221 – far exceeds the average annual compensation paid to all U.S. workers – \$67,715 – amounting to a 38% “compensation premium” over the average U.S. annual wage.
- The total copyright industries employed nearly 11.4 million workers in 2015, accounting for 7.95% of all U.S. employment, or 9.39% of all private employment in the United States. The average annual compensation paid to employees of the total copyright industries in 2015, \$82,117, exceeds the U.S. average annual wage by about 21%.

### **Copyright Industries’ Real Growth Rates Outpace the Rest of the U.S. Economy**

- During the period 2012–2015, the core copyright industries grew at an aggregate annual rate of 4.81%. The average annual growth rate of the entire U.S. economy over the same period was only 2.11%. The core copyright industries grew at a rate more than 127% greater than the remainder of the U.S. economy.
- During the same period, the total copyright industries grew at an annual rate of 3.87%, also well surpassing the growth rate for the remainder of the U.S. economy.

### **Copyright Industries Contribute Significantly to Foreign Sales and Exports, Outperforming Many Major U.S. Industry Sectors**

- Sales of selected U.S. copyright products in overseas markets amounted to \$177 billion in 2015, a significant increase over previous years.<sup>4</sup>
- As a comparison, the foreign sales of selected copyright industry sectors exceed foreign sales of other major U.S. industries, including chemicals (excluding pharmaceuticals and medicines) (\$135.8 billion), aerospace products and parts (\$134.6 billion), agricultural products (\$62.9 billion), and pharmaceuticals and medicines (\$58.3 billion).

<sup>3</sup>The “total” copyright industries include not only the core copyright but also the partial copyright, non-dedicated support, and interdependent industries. “Partial” copyright industries are industries in which only some aspect or portion of the products they create qualify for copyright protection. These industries range from fabric to jewelry to furniture to toys and games. “Non-dedicated support” industries include industries that distribute both copyright and non-copyright protected materials to businesses and consumers. Examples here include transportation services, telecommunications and wholesale and retail trade. As in past studies, only a portion of the total value added by these industries is considered to be part of the copyright industries. “Interdependent” industries include those that produce, manufacture, and sell equipment whose function is primarily to facilitate the creation, production, or use of works of copyrighted matter. These industries include manufacturers, wholesalers and retailers of TV sets, personal computers, and other devices, and usage dependent products including blank recording material, and certain categories of paper.

<sup>4</sup>This includes total foreign sales of the following “selected” core copyright industry sectors: recorded music; motion pictures, television, and video; software publishing; and non-software publications including newspapers, books and periodicals.

## II. INTRODUCTION

*Copyright Industries in the U.S. Economy: The 2016 Report* is the sixteenth in a series issued over the last 26 years by Economists Incorporated, updating and supplementing fifteen earlier reports prepared on behalf of the IIPA. This latest *Report* presents data on the value added contributions of the copyright sector to the U.S. economy for the years 2012-2015; the percentage contribution of the copyright sector to the overall U.S. economy; the relative growth of the copyright industries compared with the remainder of the economy; employment levels in the copyright sector; the average compensation for workers in the copyright sector in comparison to other sectors; and the contributions of selected copyright industries to exports and foreign sales. The underlying data used in this *Report* is current through 2015.<sup>5</sup>

The *Report* confirms once again that the U.S. copyright industries contribute significantly to U.S. GDP. The creative industries continue to outpace the rest of the economy in real growth. The copyright industries also continue to employ millions of workers whose average compensation levels substantially exceed the average level of compensation paid to all U.S. workers. Indicators from selected U.S. core copyright industries demonstrate growth in terms of foreign sales and exports during 2012-2015, with foreign sales and exports in those sectors outperforming many key U.S. industrial sectors.

As in previous years, this study is presented in five sections:

- The copyright industries
- Value added by the copyright industries
- Employment in the copyright industries
- U.S. copyright materials in world markets
- Conclusion

The period covered by this *Report* was one of improving economic conditions in the U.S. as a whole. By 2012, the American economy had clearly emerged from the painful recession of 2008-2009. By 2015, the growth of the U.S. economy had become even more dynamic.

This study continues to reflect the use of industry data classifications adopted under the North American Industry Classification System (“NAICS”) which has been widely implemented by U.S. statistical agencies. It also continues to follow the international standards and recommendations propounded by the World Intellectual Property Organization (“WIPO”) in 2003 regarding the development of economic and statistical standards to measure the impact of domestic copyright industries on domestic economies.<sup>6</sup>

The data in this study quantify the size and critical importance of the copyright industries to the U.S. economy, generally using the most current data available. As in past studies, the U.S. copyright industries’ contribution to the U.S. economy is measured by three economic indicators: value added to the U.S. gross domestic product (“GDP”) in current dollars; industry employment and share of national employment; and revenues generated from foreign sales and exports. In addition, this study includes two additional indicators of the importance of the copyright industries to the U.S. economy: compensation per employee, and real annual growth. As set forth in this *Report*, during the period 2012-2015, the copyright industries, both core and total, achieved real growth rates in excess of nearly 3.9% per year. This represents a 15% increase over the 3.4% annual real growth rates for the copyright industries during the period considered in the 2014 *Report* (2009-2013).<sup>7</sup>

Of course, the copyright industries were not the only beneficiaries of the improving economic climate after 2009. For example, during the years 2012-2015, real GDP for the U.S. as a whole increased at an annual rate of 2.11%. As this study documents, the U.S. copyright industries continue to make a disproportionately positive contribution to real growth in U.S. GDP.

<sup>5</sup> In this study the values presented for 2012 have been updated from the 2012 results presented in *Copyright Industries in the U.S. Economy: The 2014 Report*. The updates result from data revisions published by the U.S. Bureau of Economic Analysis (“BEA”) and by other government agencies since the last *Report* was completed.

<sup>6</sup> The author of this *Report*, Stephen E. Siwek, participated as an expert at the meeting of the “Working Group of Experts of the Preparation of a WIPO Handbook on Survey Guidelines for Assessing the Economic Impact of Copyright and Related Rights” which was co-sponsored by WIPO and held in Helsinki, Finland, in July 2002. That meeting launched the process which resulted in WIPO’s 2003 publication of its *Guide on Surveying the Economic Contribution of the Copyright-Based Industries* which describes many of the recommendations and standards used in this *Report*.

<sup>7</sup> *Copyright Industries in the U.S. Economy: The 2014 Report*, Tables A.1, A.2.



### III. THE COPYRIGHT INDUSTRIES

In nine of our fifteen prior economic reports, we divided the copyright industries into four groups: core, partial, distribution, and copyright related; these are the sectors we developed and defined in our first report issued in 1990. Beginning with the 2004 report, we still used four categories, but in order to conform to the international standard, we relied upon the four copyright categories defined by WIPO: core, partial, non-dedicated support, and interdependent.

**Core** industries include those industries whose primary purpose is to create, produce, distribute or exhibit copyright materials. These industries include books, newspapers and periodicals, motion pictures, TV production, recorded music, radio and television broadcasting, and software in all formats, including video games.

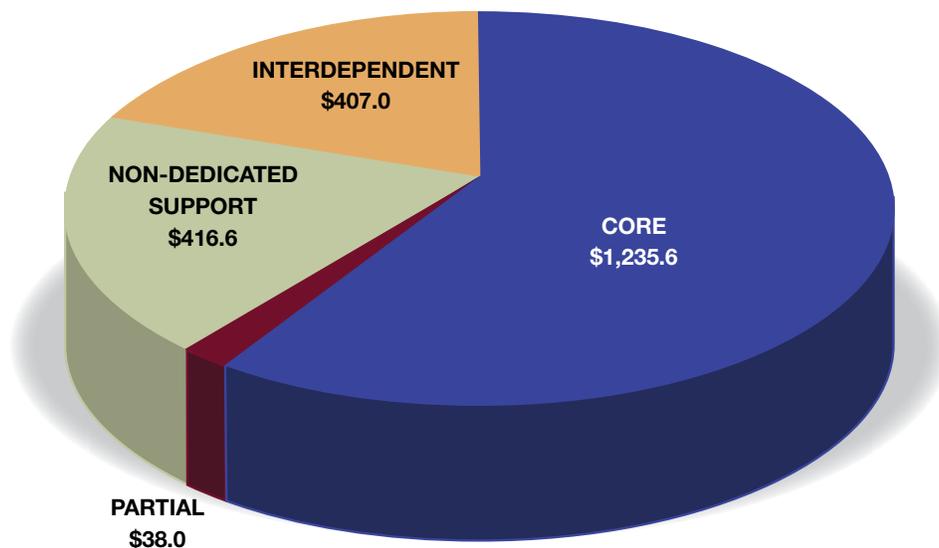
**Partial** copyright industries include industries in which only some aspect or portion of the products they create qualify for copyright protection. These industries range from fabric to jewelry to furniture to toys and games.

**Non-dedicated support** industries include those that distribute both copyright and non-copyright protected materials to businesses and consumers. Examples here include transportation services, telecommunications and wholesale and retail trade. As in past studies, only a portion of the total value added by these industries is considered to be part of the copyright industries.

**Interdependent** industries include those that produce, manufacture, and sell equipment whose function is primarily to facilitate the creation, production, or use of works of copyrighted matter. These industries include manufacturers, wholesalers and retailers of CD players, TV sets, VCRs, personal computers and usage dependent products including blank recording material and certain categories of paper.

We refer to the four groups together – core, partial, non-dedicated support, and interdependent – as the “**total**” copyright industries.

#### COPYRIGHT INDUSTRIES IN THE U.S. ECONOMY (VALUE ADDED IN BILLIONS OF DOLLARS) 2015



**2015 TOTAL: \$2,097.2 BILLION OR NEARLY \$2.1 TRILLION**

## IV. VALUE ADDED BY THE COPYRIGHT INDUSTRIES

The most appropriate way to measure an industry's contribution to the national economy is to measure the industry's value added. Value added reflects the economic contribution of labor and capital of a particular industry. The sum of the value added of all industries in the United States is equal to gross domestic product ("GDP"), a standard measure of the size of the U.S. economy. For this reason, value added calculations can be used to draw comparisons of the relative size and growth rates of different industries in a way that is consistent with the federal government's national income and product accounting data.

In our past reports, we noted that timely estimates of the value added by individual industries were not generally available from government sources for many of the industries considered in these studies. As a result, our prior estimates of copyright industry value added were derived by applying historical input-output factors to more current data on industry sales from both government and non-government sources. By contrast, in the most recent studies, we make direct use of the industry specific value added estimates produced by the U.S. Bureau of Economic Analysis ("BEA") to derive the contributions made by the core and total copyright industries to the U.S. economy. An additional benefit of using these data is that the BEA calculates both current dollar and constant dollar value added for the industry classifications that it analyzes. In this *Report*, the constant dollar value added figures are used to derive estimates of the real growth rates achieved by the core and total copyright industries on a year-by-year basis. These data are also used to measure the contribution made by the copyright industries to the real annual growth achieved by the U.S. economy as a whole.

As noted, the economy in 2015 continued to grow, and most U.S. industries experienced increasing sales and profits during those years. Within this context, the copyright industries remained a particularly important contributor to U.S. GDP. As shown in Table 1 below, the current dollar value added to U.S. GDP by the core copyright industries reached \$1,235.6 billion in 2015. In the same year, U.S. GDP reached \$17.947 trillion. Thus, in 2015, the core copyright industries achieved a 6.88% share of nominal U.S. GDP. The value added by the total copyright industries in the same period are also shown. As reported in Table 1, the value added to U.S. GDP by the total copyright industries in 2015 was \$2.097 trillion, or 11.69% of U.S. GDP. Both the core and total share of U.S. GDP increased each year during the period.

**TABLE 1:**

### COPYRIGHT INDUSTRIES' VALUE ADDED (BILLIONS OF U.S. DOLLARS), 2012-2015

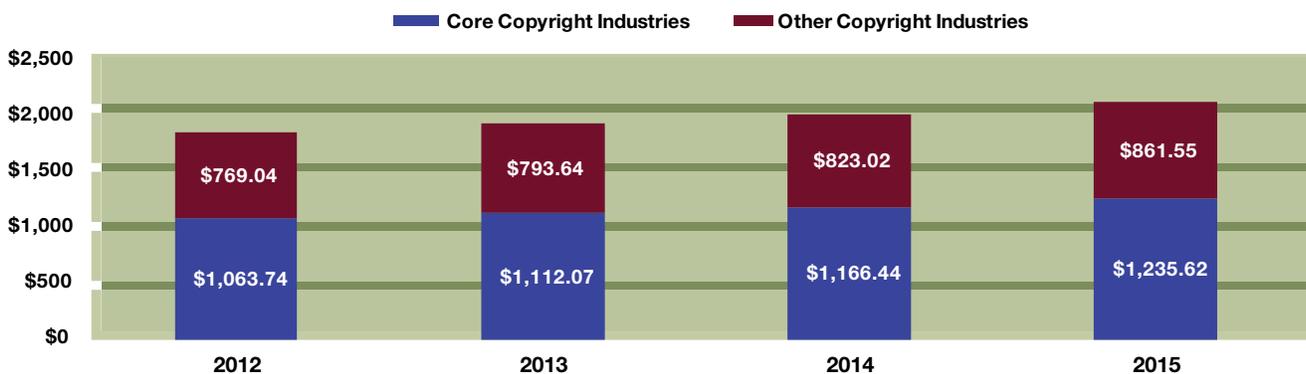
	2012	2013	2014	2015
<b>Core Copyright Industries</b>	\$1,063.7	\$1,112.1	\$1,166.4	\$1,235.6
<b>Total U.S. GDP</b>	\$16,155.3	\$16,663.2	\$17,348.1	\$17,947.0
<b>Core Share of U.S. GDP</b>	6.58%	6.67%	6.72%	6.88%
	2012	2013	2014	2015
<b>Total Copyright Industries</b>	\$1,832.8	\$1,905.7	\$1,989.5	\$2,097.2
<b>Total U.S. GDP</b>	\$16,155.3	\$16,663.2	\$17,348.1	\$17,947.0
<b>Total Share of U.S. GDP</b>	11.34%	11.44%	11.47%	11.69%



As shown in Chart 1 below, our current estimates of the value added for the core copyright industries increased from \$1,063.74 billion in 2012 to \$1,235.62 billion in 2015. The estimated value added for the other (non-core) copyright industries rose from \$769.04 billion in 2012 to \$861.55 billion in 2015.

**CHART 1:**

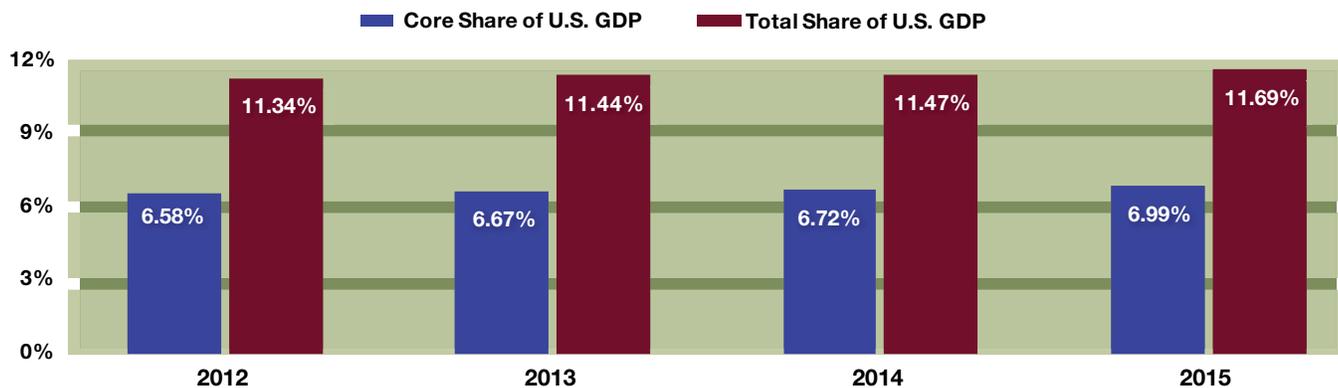
**COPYRIGHT INDUSTRIES' VALUE ADDED  
(BILLIONS OF CURRENT DOLLARS), 2012-2015**



The copyright industries' current dollar share of the U.S. economy is provided in Chart 2 below. On the basis of the methodology described above, we now estimate that the core copyright industries' current dollar share of the U.S. economy has increased from approximately 6.58% to 6.88% of the U.S. economy over the years 2012 through 2015. Total copyright industries' current dollar share of U.S. GDP reached 11.69% in 2015, up from 11.34% in 2012.

**CHART 2:**

**COPYRIGHT INDUSTRIES' SHARE OF  
CURRENT DOLLAR GDP, 2012-2015**



To put these figures in perspective, it is useful to compare the economic contributions of the U.S. copyright industries to the contributions made by other U.S. industries in the same time period. Inter-industry comparisons to the U.S. copyright industry are shown in Table 2.

As reported in Table 2, the total value added to the U.S. economy by the entire federal government in 2015 was \$729.1 billion.<sup>8</sup> This amount is substantially lower than the value added by the total copyright industries in the same year. In 2015, the total value added to the U.S. economy by state and local governments was \$1,594.5 billion, or nearly \$1.6 trillion. This value is approximately 24% lower than the value added by the total copyright industries in 2015. Comparisons of the copyright industries' value added in 2014 and 2015 to other sectors of the U.S. economy are also provided in Table 2. These comparisons clearly document the size and importance of the copyright industries today.

**TABLE 2:**

**VALUE ADDED COMPARISONS BETWEEN COPYRIGHT AND OTHER SECTORS (BILLIONS OF U.S. DOLLARS), 2014-2015**

	2014	2015
<b>Core Copyright - Value Added</b>	<b>\$1,166.4</b>	<b>\$1,235.6</b>
<b>Total Copyright - Value Added</b>	<b>\$1,989.5</b>	<b>\$2,097.2</b>
<b>Federal Government - Value Added</b>	<b>\$718.0</b>	<b>\$729.1</b>
<b>State &amp; Local Government - Value Added</b>	<b>\$1,556.6</b>	<b>\$1,594.5</b>
<b>Construction - Value Added</b>	<b>\$664.0</b>	<b>\$716.9</b>
<b>Healthcare &amp; Social Assistance - Value Added</b>	<b>\$1,226.9</b>	<b>\$1,291.6</b>
<b>Finance &amp; Insurance - Value Added</b>	<b>\$1,222.9</b>	<b>\$1,275.5</b>

The value added estimates for the copyright industries that are contained in this *Report* reflect underlying data obtained from the BEA, the U.S. Census Bureau and other government statistical agencies. In particular, the estimates of copyright industry value added make direct use of the industry-specific estimates of U.S. value added regularly published by the BEA. These industry-specific estimates (in both current dollar and real terms) are used as starting points to derive the contributions made by the core and total copyright industries to U.S. GDP.

Real growth rates in value added experienced during the period 2012-2015 by the U.S. copyright industries, and by the U.S. economy as a whole, are provided in Table 3.<sup>9</sup> For each of the periods 2012-2013, 2013-2014, and 2014-2015, the U.S. core copyright industries experienced positive real growth in excess of 3.71% annually. Over the entire period 2012-2015, the core copyright industries grew at a real annual growth rate of 4.81%.

The total copyright industries experienced a comparable pattern of real growth during the years 2012-2015. As shown in Table 3, in 2012-2013, 2013-2014, and 2014-2015, the total copyright industries grew at annual rates in excess of 2.9% per year. For the full period of 2012-2015, the real value added by the total copyright industries grew at a rate of 3.87% per year.

<sup>8</sup> U.S. GDP figures from U.S. BEA, *Value Added by Industry*, available at: <http://www.bea.gov/iTable/iTable.cfm?ReqID=51&step=1#reqid=51&step=51&i-suri=1&5114=a&5102=1>.

<sup>9</sup> Real growth rates measure changes in constant dollar value added over time. In these estimates, current dollar value added figures are converted to "chained" dollars for the year 2009.

Both the U.S. copyright industries and the U.S. economy experienced positive real annual growth during the years 2012 through 2015. In order to provide a basis of comparison, the growth patterns for the U.S. economy are also provided in Table 3.

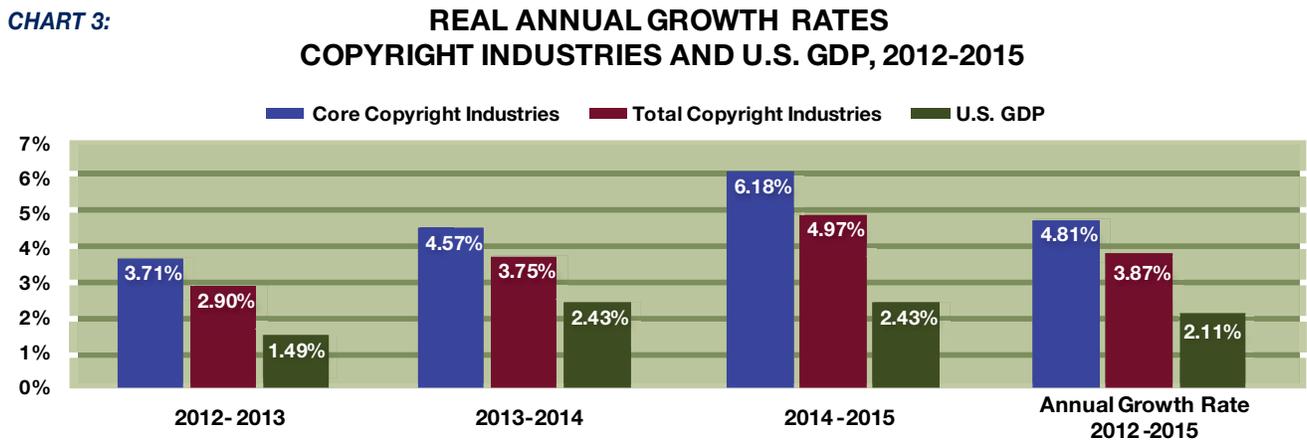
For the period 2012-2013 through 2014-2015, the U.S. economy grew at an annual rate of 2.11%. For the individual years 2012-2013, 2013-2014, and 2014-2015 the U.S. economy increased at annual rates of 1.49%, 2.43%, and 2.43% respectively. As these figures make clear, for this period, the compound annual growth rate achieved by the U.S. copyright industries significantly exceeded the compound annual growth rate achieved by the U.S. economy as a whole.

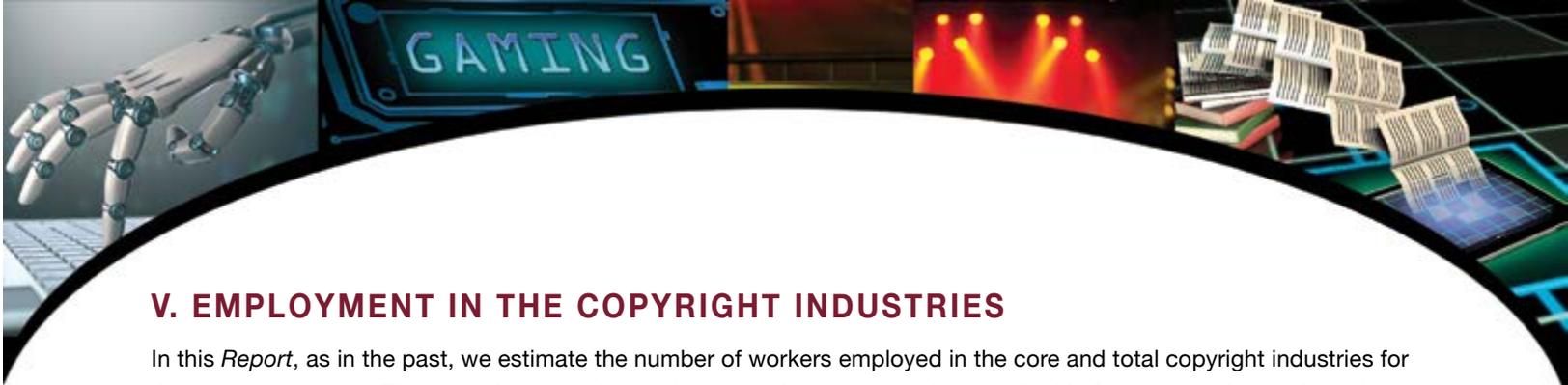
**TABLE 3:**

**REAL ANNUAL GROWTH RATES  
VALUE ADDED TO U.S. GDP, 2012-2015**

	2012-2013	2013-2014	2014-2015	Annual Growth Rate 2012-2015
<b>Core Copyright Industries</b>	3.71%	4.57%	6.18%	4.81%
<b>Total Copyright Industries</b>	2.90%	3.75%	4.97%	3.87%
<b>U.S. GDP</b>	1.49%	2.43%	2.43%	2.11%

We also express, in Chart 3, the real (constant dollar) annual growth rates experienced by the copyright industries, compared with the real growth rate achieved by the U.S. economy as a whole, during the periods 2012-2013, 2013-2014, and 2014-2015. As shown in Chart 3, the core copyright industries grew at a rate of 4.59% in 2013-2014 and 6.18% in 2014-2015. Similarly, the total copyright industries grew at a rate of 3.75% in 2013-2014 and 4.97% in 2014-2015. By contrast, the real growth rates achieved by the U.S. economy as a whole were 2.43% in both 2013-2014 and 2014-2015. As Chart 3 demonstrates, since 2012 the core and the total copyright industries have grown substantially faster than the real annual rate of growth experienced for the U.S. GDP as a whole.





## V. EMPLOYMENT IN THE COPYRIGHT INDUSTRIES

In this *Report*, as in the past, we estimate the number of workers employed in the core and total copyright industries for the years 2012-2015. The procedures used to derive our estimates of employment in this *Report* were largely based on the formulas derived in the earlier reports. In those reports, employee counts were derived so that the counts would be consistent in both the NAICS and the International Standard Industrial Classification of All Economic Activities (“ISIC”) classification systems. As in the past, the actual employee counts by NAICS code were extracted from the Bureau of Labor Statistics (“BLS”) database.

Employment figures for the core and total copyright industries for the years 2012, 2013, 2014, and 2015 are provided in Table 4. As shown, the core copyright industries employed 5,182,400 workers in 2012. These workers represented 3.84% of the total U.S. workforce in 2012. By 2015, the number of core copyright employees in the United States had increased by 357,900 workers to 5,540,300. These workers represented 3.87% of the total U.S. workforce in 2015. In 2012, the total copyright industries employed more than 10.7 million workers. By 2015, employment in the total copyright industries had increased to nearly 11.4 million. During these years, the total copyright industries represented more than a 7.9% share of all U.S. employment. The total U.S. employment during this period increased from 135,076,000 in 2012 to 143,146,000 in 2015.

**TABLE 4:**

**COPYRIGHT INDUSTRIES AND TOTAL U.S. EMPLOYMENT  
(IN THOUSANDS), 2012-2015**

	2012	2013	2014	2015
<b>Core Copyright Industries</b>	5,182.4	5,286.1	5,421.6	5,540.3
<b>Total U.S. Employment</b>	135,076.0	137,387.0	140,402.0	143,146.0
<b>Core Share of U.S. Employment</b>	3.84%	3.85%	3.86%	3.87%
	2012	2013	2014	2015
<b>Total Copyright Industries</b>	10,720.6	10,901.3	11,152.0	11,373.0
<b>Total U.S. Employment</b>	135,076.0	137,387.0	140,402.0	143,146.0
<b>Total Share of U.S. Employment</b>	7.94%	7.93%	7.94%	7.95%

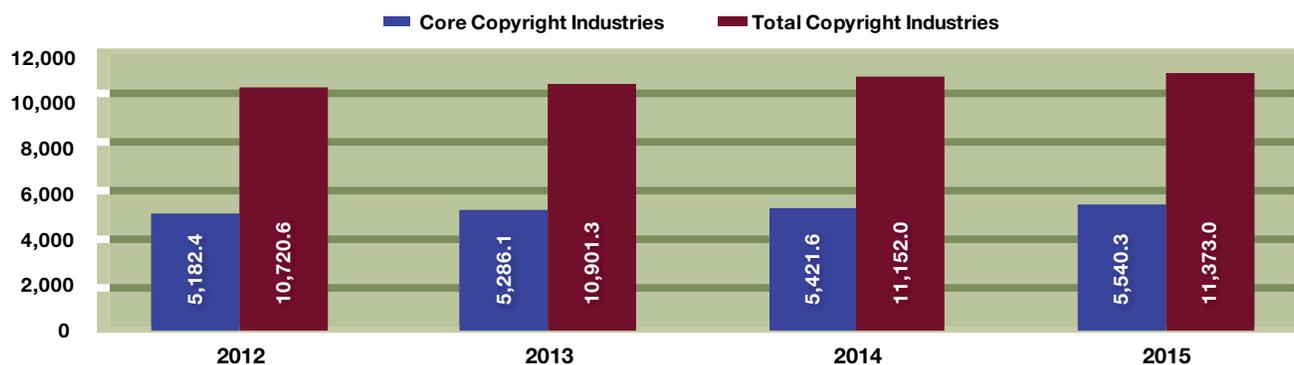
For U.S. private industry, employment growth during the years 2012 through 2015 was comparable to the employment trends experienced for the U.S. economy as a whole. As shown in Table 5, total U.S. private employment increased from 113,192,000 in 2012 to 121,106,000 in 2015. During these years, the core copyright industries by and large maintained a 4.6% share of all private employment, while the total copyright industries' share of private employment remained near 9.5% for the entire period.

**TABLE 5: COPYRIGHT INDUSTRIES AND TOTAL PRIVATE EMPLOYMENT (IN THOUSANDS), 2012-2015**

	2012	2013	2014	2015
<b>Core Copyright Industries</b>	5,182.4	5,286.1	5,421.6	5,540.3
<b>Total U.S. Private Employment</b>	113,192.0	115,570.0	118,455.0	121,106.0
<b>Core Share of U.S. Employment</b>	4.58%	4.57%	4.58%	4.57%
	2012	2013	2014	2015
<b>Total Copyright Industries</b>	10,720.6	10,901.3	11,152.0	11,373.0
<b>Total U.S. Private Employment</b>	113,192.0	115,570.0	118,455.0	121,106.0
<b>Total Share of U.S. Employment</b>	9.47%	9.43%	9.41%	9.39%

U.S. copyright industry employment is also expressed in Chart 4 below. This chart demonstrates graphically that the total number of workers in the core copyright industries consistently increased from 2012 to 2015.<sup>10</sup> Because U.S. total employment also rose during this period, the core copyright share of employment remained at approximately 3.9%, while the total copyright share of employment remained above 7.9%, varying between 7.94% in 2012 to a high of 7.95% in 2015.

**CHART 4: U.S. COPYRIGHT INDUSTRY EMPLOYMENT (IN THOUSANDS), 2012-2015**



<sup>10</sup>As a whole, the core copyright industries have consistently been able to add jobs to the U.S. economy. Within the core however, certain component industries, particularly in the printing sector, have experienced declines in employment since the late 1990s.

In this *Report*, we also quantify the average compensation per employee received by workers in the copyright industries and in the U.S. as a whole. In these calculations “compensation” means “wages and salary accruals and supplements to wages and salary accruals.” These supplements include “employer contributions for employee pensions and insurance funds and employer contributions for government social insurance.”<sup>11</sup> These data are shown in Table 6.

During the period 2012-2015, average compensation per employee in both the core and total copyright industries increased. As shown in Table 6, average compensation earned by core copyright employees stood at \$93,221.45 in 2015. This value was 38% higher than the average compensation paid to all U.S. employees in 2015 (\$67,714.68). For total copyright industry workers, average compensation in 2015 was \$82,116.96, about 21% higher than the U.S. average.

**TABLE 6:**

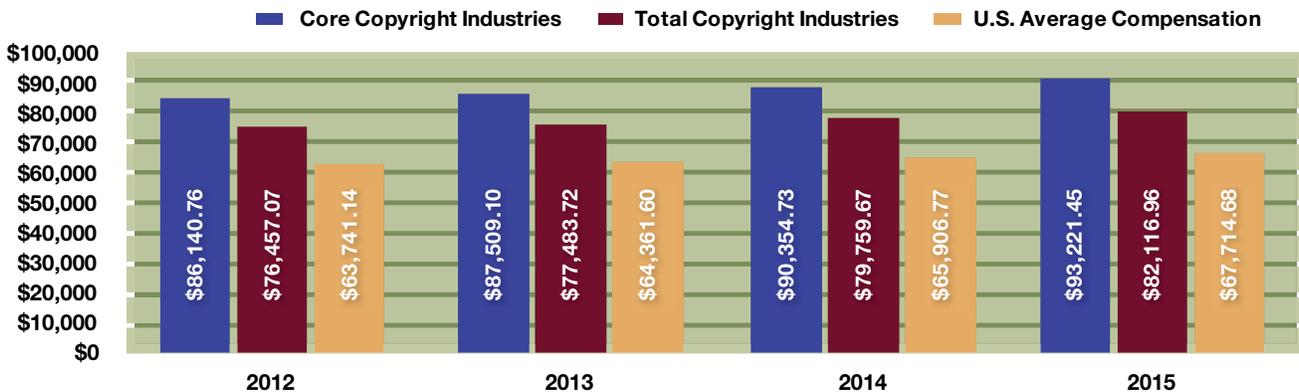
**COMPENSATION PER EMPLOYEE  
(U.S. DOLLARS), 2012-2015**

Core Copyright	2012	2013	2014	2015
Core Copyright Industries	\$86,140.76	\$87,509.10	\$90,354.73	\$93,221.45
U.S. Average Compensation	\$63,741.14	\$64,361.60	\$65,906.77	\$67,714.68
Ratio: Core to U.S.	1.35	1.36	1.37	1.38
Total Copyright	2012	2013	2014	2015
Total Copyright Industries	\$76,457.07	\$77,483.72	\$79,759.67	\$82,116.96
U.S. Average Compensation	\$63,741.14	\$64,361.60	\$65,906.77	\$67,714.68
Ratio: Total to U.S.	1.20	1.20	1.21	1.21

Compensation data are also reported graphically in Chart 5. The compensation “premium” paid to workers in the copyright industries continued and increased through 2012, 2013, 2014, and 2015.

**CHART 5:**

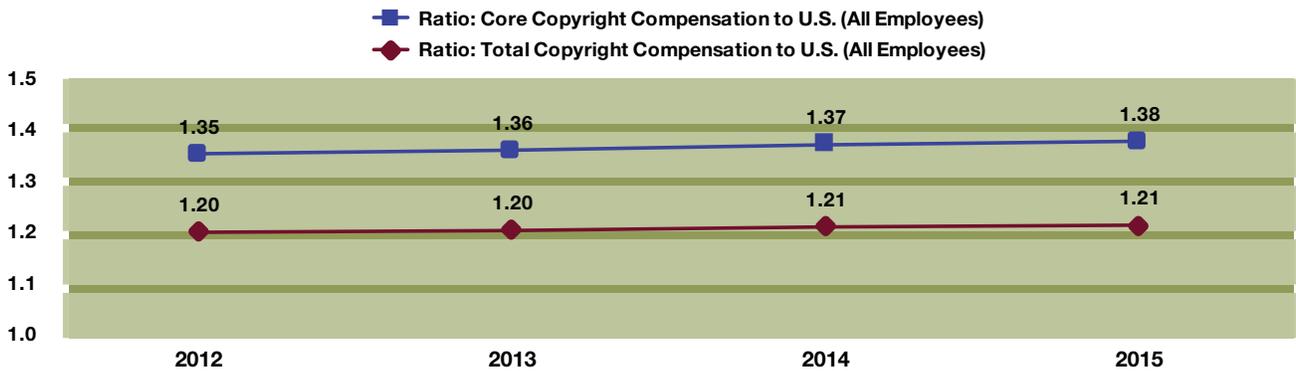
**U.S. COPYRIGHT INDUSTRY COMPENSATION  
PER EMPLOYEE, 2012-2015**



<sup>11</sup> See U.S. BEA, *Glossary Index*.

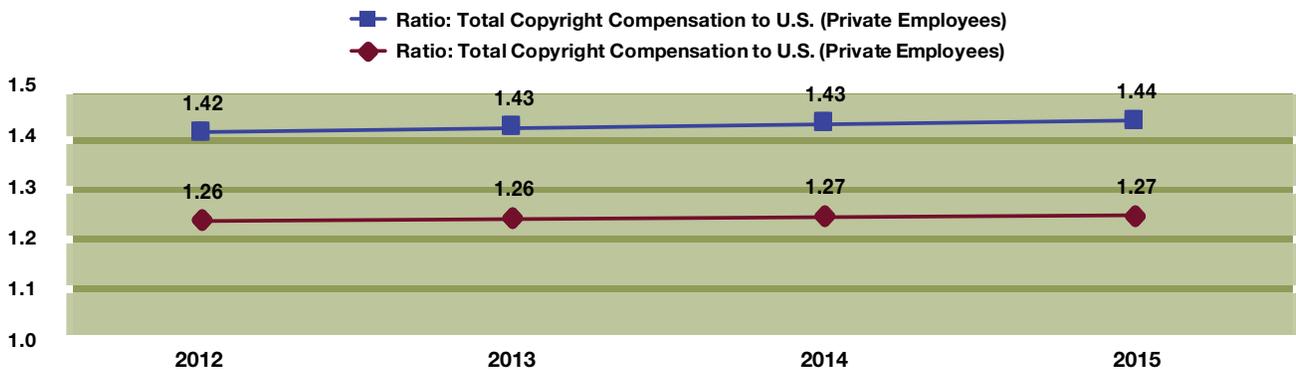
The compensation premium paid to copyright industry employees can also be illustrated by ratio. In Chart 6A, the average compensation paid to employees in the core and total copyright industries is compared to the average compensation paid to all workers in the United States. For core copyright employees, the compensation premium has generally been in the range of 35%, rising to 38% in 2015. For total copyright employees, the compensation premium has centered at around 21%. In other words, core copyright employees on average now receive about 38% more compensation than the average U.S. worker, while total copyright industry employees now receive about 21% more compensation than the average worker.

**CHART 6A:** U.S. COPYRIGHT INDUSTRY COMPENSATION RATIOS COMPARED TO ALL U.S. EMPLOYEES (1.00=100%), 2012-2015



Copyright industry workers are also paid more than the average U.S. worker in private industry. As shown in Chart 6B, the compensation paid to workers in the core copyright industries has generally been about 43% higher than the average compensation paid to U.S. private industry employees, and in 2015 was 44% higher. Similarly, the compensation paid to workers in the total copyright industries has generally been about 27% higher than the average compensation paid to U.S. private industry employees as a whole.

**CHART 6B:** U.S. COPYRIGHT INDUSTRY COMPENSATION RATIOS COMPARED TO PRIVATE U.S. EMPLOYEES (1.00=100%), 2012-2015



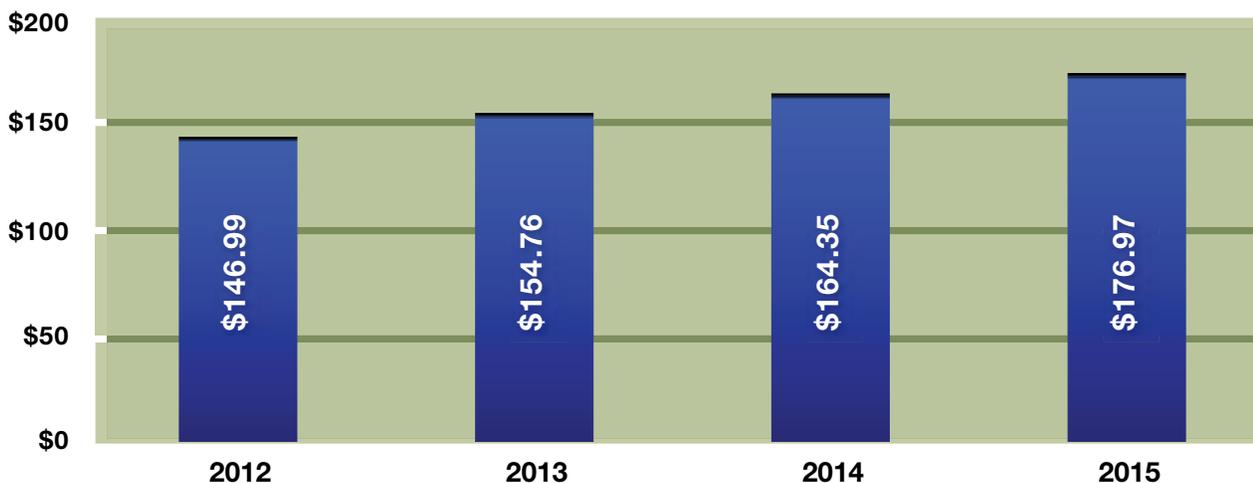
## VI. U.S. COPYRIGHT MATERIALS IN WORLD MARKETS

Consumers in non-U.S. markets continue to demand products that embody American creativity. Copyright products that are sold abroad may be manufactured in the U.S. or in foreign markets but, in either case, the creative components of those products are nurtured by the protection afforded under U.S. laws.

As noted in prior reports on these industries, we believe that the U.S. government's statistics on "exports" of copyright products generally fail to measure accurately the true value of American copyright works sold abroad. We recognize that, in recent years, efforts have been undertaken to improve the scope of the copyright product export statistics that are gathered in government surveys. For example, the U.S. Census Bureau now reports "Estimated Export Revenue for Employer Firms" for a number of the copyright industries, including the motion picture industry and the sound recording industry.<sup>12</sup> However, the export statistics reported by Census are substantially lower than foreign market sales figures derived from non-government sources.

As in past reports, we again provide estimates of foreign sales and exports for four selected core copyright areas for which we have data during the years 2012 through 2015: recorded music; motion pictures, television and video; software publishing; and non-software publications including newspapers, books and periodicals. For these years, we report total foreign sales for the "selected" core copyright areas of \$146.99 billion in 2012, \$154.76 billion in 2013, \$164.35 billion in 2014, and \$176.97 billion in 2015. Chart 7 below demonstrates these figures graphically.

**CHART 7: REVENUE GENERATED BY FOREIGN SALES AND EXPORTS OF SELECTED COPYRIGHT SECTORS (IN BILLIONS OF DOLLARS), 2012-2015**



Annual growth rates for foreign sales of the selected core copyright industries are provided in Table 7. As shown, foreign sales for these selected industries continued to grow substantially during the 2012-2015 time period.

<sup>12</sup> See U.S. Census Bureau, *Estimated Export Revenue for Employer Firms: 2010 through 2014*, Table 6.

**TABLE 7:**

**ANNUAL GROWTH RATE OF  
FOREIGN SALES AND EXPORTS  
2012-2015**

	2012-2013	2013-2014	2014-2015
<b>Growth Rate</b>	<b>5.29%</b>	<b>6.20%</b>	<b>7.68%</b>

In addition, the foreign sales and exports of these core copyright areas remain significantly larger than the entirety of exports of other major industry sectors. As reported in Table 8 below, copyright industry sales in foreign markets exceed the exports of the following U.S. industries: chemicals (excluding pharmaceuticals and medicines); aerospace products and parts; agricultural products; electrical equipment, appliances and components; pharmaceuticals and medicines. In 2015, the selected copyright industries generated non-U.S. sales of \$177 billion. In the same year, the U.S. chemical industry (excluding pharmaceuticals and medicines) achieved foreign sales and exports of \$135.8 billion. In 2015, reported foreign sales and exports for U.S. aerospace products approached \$134.6 billion, while foreign sales and exports of U.S. agricultural products were approximately \$62.9 billion. In 2015, foreign sales and exports of pharmaceuticals and medicines stood at \$58.3 billion.<sup>13</sup>

**TABLE 8:**

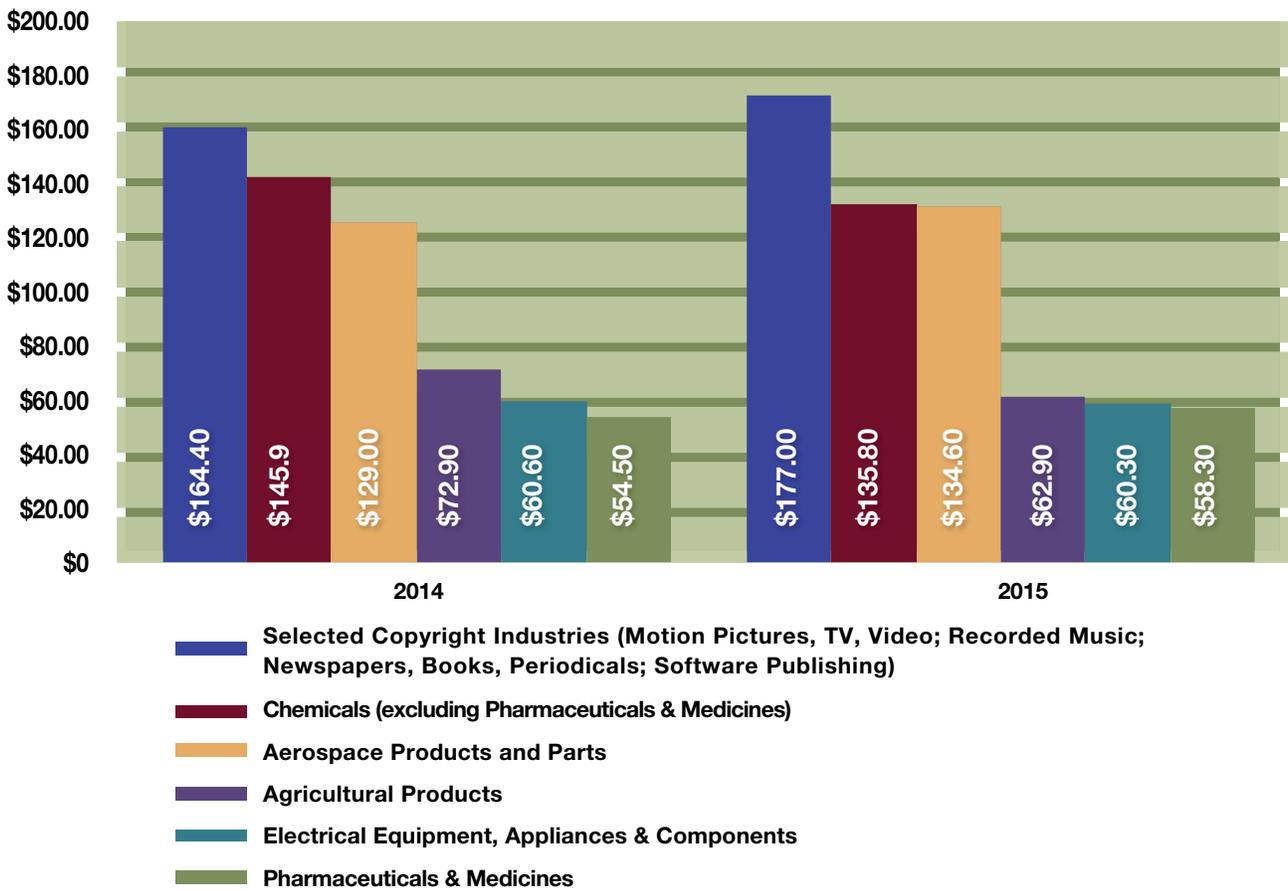
**FOREIGN SALES AND EXPORTS FOR SELECTED  
U.S. INDUSTRIES (BILLIONS OF U.S. DOLLARS), 2014-2015**

	2014	2015
<b>Selected Copyright Industries (Motion Pictures, TV, Video; Recorded Music; Newspapers, Books, Periodicals; Software Publishing)</b>	<b>\$164.4</b>	<b>\$177.0</b>
<b>Chemicals (excluding Pharmaceuticals &amp; Medicines)</b>	<b>\$145.9</b>	<b>\$135.8</b>
<b>Aerospace Products and Parts</b>	<b>\$129.0</b>	<b>\$134.6</b>
<b>Agricultural Products</b>	<b>\$72.9</b>	<b>\$62.9</b>
<b>Electrical Equipment, Appliances &amp; Components</b>	<b>\$60.6</b>	<b>\$60.3</b>
<b>Pharmaceuticals &amp; Medicines</b>	<b>\$54.5</b>	<b>\$58.3</b>

<sup>13</sup> In this *Report*, U.S. exports by industry were taken from the International Trade Statistics "Censtats" database at the U.S. Census Bureau. Export statistics by industry were identified by NAICS code.

Foreign sales and exports data by industry are also reported graphically in Chart 8. The data represent the significant contribution made by U.S. copyright works sold abroad to the overall trade balance of the U.S. economy, as well as by comparison with other industry sectors.

**CHART 8: FOREIGN SALES AND EXPORTS FOR SELECTED INDUSTRIES (BILLIONS OF U.S. DOLLARS), 2014-2015**



## VII. CONCLUSION

The U.S. copyright industries have consistently outperformed the rest of the U.S. economy, in terms of their real annual growth rates and their contributions to the overall growth of the U.S. economy as a whole. These industries also command significant shares of U.S. GDP and they employ millions of U.S. workers. In addition, the compensation paid to U.S. workers in the copyright industries consistently and substantially exceeds the average compensation level paid to U.S. workers as a whole. Finally, copyright sectors continue to play a prominent role in the growth of U.S. exports.

Value added in the copyright industries continues to grow. As of 2015, the value added by the core copyright industries was \$1,235.6 billion, approximately 6.88% of U.S. GDP. In the same year, value added for the total copyright industries stood at \$2,097.2 billion or 11.69% of GDP. In 2012-2013, 2013-2014, and 2014-2015, the real annual growth rates achieved by both the core and total copyright industries were significantly higher than the real growth rates exhibited by the U.S. economy as a whole.

The U.S. core copyright industries now employ nearly 5.6 million workers while some 11.4 million people are employed by the total copyright industries. The annual compensation paid to core copyright workers now exceeds the average annual compensation paid to all U.S. workers by 38%. The average compensation paid to employees of the total copyright industries exceeds the U.S. average by 21%.

Sales of U.S. copyright materials continue to expand in overseas markets. For selected core copyright sectors, sales in foreign markets exceeded \$164 billion in 2014 and was approximately \$177 billion in 2015. The foreign sales of these selected copyright sectors exceed foreign sales of other U.S. industries including chemicals (excluding pharmaceuticals and medicines), aerospace, agricultural products, electrical equipment, and pharmaceuticals and medicines.

These consistently positive trends solidify the status of the U.S. copyright industries as a key engine of growth for the U.S. economy as a whole. As new technologies support the development of new distribution methods for legitimate copyrighted products, the U.S. copyright-based industries represented in the IIPA remain optimistic that economic growth, combined with strong laws, effective enforcement, and steps to open markets, will continue to pave the way for economic growth both in the U.S. and abroad.

## APPENDIX A: TABLES OF STATISTICS

**TABLE A.1**

### CORE COPYRIGHT INDUSTRIES VALUE ADDED TO U.S. GDP, 2012-2015

Nominal Value Added (Billions of dollars)	2012	2013	2014	2015
Core Copyright	\$1,063.74	\$1,112.07	\$1,166.44	\$1,235.62
U.S. GDP	\$16,155.30	\$16,663.20	\$17,348.10	\$17,947.00
Share	6.58%	6.67%	6.72%	6.88%
Real Value Added (Billions of 2009 dollars)	2012	2013	2014	2015
Core Copyright	\$1,060.53	\$1,099.87	\$1,150.16	\$1,221.18
U.S. GDP	\$15,354.60	\$15,583.30	\$15,961.70	\$16,348.90
Share	6.91%	7.06%	7.21%	7.47%
Annual Growth in Real Value Added	2011-2012	2012-2013	2013-2014	2014-2015
Core Copyright	N/A	3.71%	4.57%	6.18%
U.S. GDP	N/A	1.49%	2.43%	2.43%

#### Compound Annual Growth Rates 2012-2015

Core Copyright	4.81%
U.S. GDP	2.11%

**TABLE A.2**

### TOTAL COPYRIGHT INDUSTRIES VALUE ADDED TO U.S. GDP, 2012-2015

Nominal Value Added (Billions of dollars)	2012	2013	2014	2015
Core Copyright	\$1,832.78	\$1,905.71	\$1,989.45	\$2,097.17
U.S. GDP	\$16,155.30	\$16,663.20	\$17,348.10	\$17,947.00
Share	11.34%	11.44%	11.47%	11.69%
Real Value Added (Billions of 2009 dollars)	2012	2013	2014	2015
Core Copyright	\$1,813.65	\$1,866.26	\$1,936.30	\$2,032.60
U.S. GDP	\$15,354.60	\$15,583.30	\$15,961.70	\$16,348.90
Share	11.81%	11.98%	12.13%	12.43%
Annual Growth in Real Value Added	2011-2012	2012-2013	2013-2014	2014-2015
Core Copyright	N/A	2.90%	3.75%	4.97%
U.S. GDP	N/A	1.49%	2.43%	2.43%

#### Compound Annual Growth Rates 2012-2015

Core Copyright	3.87%
U.S. GDP	2.11%

TABLE A.3

**U.S. COPYRIGHT INDUSTRY EMPLOYMENT  
(IN THOUSANDS), 2012-2015**

<b>Core Copyright</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>
Core Copyright Employment	5,182	5,286	5,422	5,540
Total U.S. Employment	135,076	137,387	140,402	143,146
Total Private U.S. Employment	113,192	115,570	118,455	121,106
Core Copyright Share of U.S. Employment	3.84%	3.85%	3.86%	3.87%
Core Copyright Share of Private U.S. Employment	4.58%	4.57%	4.58%	4.57%
<b>Total Copyright</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>
Total Copyright Employment	10,721	10,901	11,152	11,373
Total U.S. Employment	135,076	137,387	140,402	143,146
Total Private U.S. Employment	113,192	115,570	118,455	121,106
Total Copyright Share of U.S. Employment	7.94%	7.93%	7.94%	7.95%
Total Copyright Share of Private U.S. Employment	9.47%	9.43%	9.41%	9.39%

TABLE A.4

**U.S. COPYRIGHT INDUSTRY COMPENSATION PER EMPLOYEE  
(U.S. DOLLARS), 2012-2015**

<b>Core Copyright</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>
Core Copyright Compensation/Employee	\$86,140.76	\$87,509.10	\$90,354.73	\$93,221.45
Average U.S. Compensation/Employee	\$63,741.14	\$64,361.60	\$65,906.77	\$67,714.68
Average Private U.S. Compensation/Employee	\$60,739.73	\$61,350.32	\$62,976.04	\$64,783.17
Ratio: Core Copyright Compensation to U.S.	1.35	1.36	1.37	1.38
Ratio: Core Copyright Compensation to Private U.S.	1.42	1.43	1.43	1.44
<b>Total Copyright</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>
Total Copyright Compensation/Employee	\$76,457.07	\$77,483.72	\$79,759.67	\$82,116.96
Average U.S. Compensation/Employee	\$63,741.14	\$64,361.60	\$65,906.77	\$67,714.68
Average Private U.S. Compensation/Employee	\$60,739.73	\$61,350.32	\$62,976.04	\$64,783.17
Ratio: Total Copyright Compensation to U.S.	1.20	1.20	1.21	1.21
Ratio: Total Copyright Compensation to Private U.S.	1.26	1.26	1.27	1.27

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# Copyright Industries in the U.S. Economy: The 2016 Report



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