



Footage Survey

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Introduction

The picture industry has always been susceptible to the idea of a silver bullet, an innovation that will open up new markets and new revenue streams. It's fair to say that footage - moving images, not still - has taken its turn in this spotlight. Part of the thinking behind this survey is to test how far footage has progressed on its path to being the 'next big thing' as well as providing some insight into the licensing issues associated with the medium.

Part 1 of the survey focuses on the place of footage within the industry. 32 BAPLA members responded to this part of the survey - a decent return by historical standards but still no more than 16% of the entire membership. So please treat these results accordingly - they are not presented as chapter and verse but as a useful guide to current trends.

The main theme is diversity which befits a sector still in the relatively early stages of development. So we range from traditional footage archives with no content available online to libraries just moving into the field (50% have been in footage for a year or less). Over 50% of the content available is classified as 'historic', the remainder covers a wide range of subject matter.

Perhaps most significantly, 36% of those who answered the question declared zero sales from footage in the last financial year. Footage accounted for more than 10% of overall sales for just 2 of the libraries who responded.

So no silver bullet. But no doom and gloom either. 66% of respondents plan to grow their footage collection in the coming year and it's also interesting to note that the majority of those who are selling footage are doing so to new customers, not clients who have previously licensed stills.

All of which points to a sector of the industry still in its infancy for all but those who have specialised in footage from the start. It will be interesting to see how it progresses and we plan to update this survey within a couple of years to track developments.

Part 2 of the survey focuses on pricing. We had a disappointingly low response to this part - only 5 replies of which only 2 completed the full survey. It may be worth pointing out at this point that pricing surveys are always confidential. Not only do we not publish answers from individual libraries, we couldn't even if we wanted to as your responses come through anonymously to the BAPLA office.

So what we have in Part 2 is a range of prices for specific usage but a range made up of at most 3 responses to each question. If only one price is stated then the same price was given by all who responded. This is a necessarily partial survey of pricing trends and should be treated as such. We have chosen not to include online prices published on members' websites but these are readily accessible for anyone wanting to build a more comprehensive picture.

Perhaps the most interesting answer in the whole survey came in response to question 31: the majority of footage research is done by in-house library researchers, very much bucking the trend for stills. The lesson from this? Footage isn't just stills that move - it's an entirely different medium. 64% of footage is sourced from professional stock cameramen/videographers, only 27% from stills photographers shooting footage. There is clearly potential in the footage sector but if you're going to expand into it make sure you do it properly.

I'd like to thank the members of the Rights Group for all their hard work in putting this survey together:

David Bell (Imperial War Museum), Gemma Dewhurst (PA Images), Tim Harris (Nature PL), Olivia Stroud (V&A Images), Mark Vivian (Mary Evans Picture Library), Rachel Wakefield (Alamy)

Also to those BAPLA members who took the time to complete the survey - we can't do our job without you.

Finally, special thanks must go to Susanne Kittlinger in the BAPLA Office for pulling all the raw data together into the easy-to-read format you see below and to Ben Jones from Science Photo Library who was parachuted into the Rights Group to hold the hands of those of us who were footage virgins and who provided invaluable advice and insight.

Steve Lake, BAPLA Chairman

19th September 2013

Footage Survey Part 1

Your library/agency:

1. What type of library/agency are you?

Small (2-9 staff):	64.5% (20)
Large (25-75 staff):	12.9% (4)
Large (75+ staff):	9.7% (3)
Medium (10-24 staff):	6.5% (2)

Specialist:	22.6% (7)
Generalist:	3.2% (1)

2. Do you license footage?

It should be noted that this question was only answered by 16% (31) out of a total 200+ BAPLA members.

No:	58.1% (18)
Yes:	41.9% (13)

Out of those who licence footage:

23.07% (3) are large (75+ staff)
23.07% (3) are large (25-75 staff)
46.1% (6) are small (2-9 staff)
7.6% (1) are medium (10-24 staff)

3. Do you plan to introduce footage into your collection in the next three years?

18 out of 32 participants answered this question.

No:	61.1% (11)
Yes:	22.2% (4)
Maybe:	16.6% (3)

The remainder of part 1 of the footage survey was only answered by the 13 agencies currently licensing footage.

4. For how long have you been licensing footage?

5 out of the 10 agencies who answered this question have been licensing footage for a year - the other 5 respondents have been licensing footage for 3 years, 3.5 years, 5 years, 10 years and 50 years plus respectively.

Your footage collection:

5. What percentage of your entire footage collection is viewable online?

We received 10 responses to this question.

3 said: None
3 said: 100%
1 said: 95%
1 said: 80%
1 said: 50%
1 said: 20%

6. What percentage of your footage is stored digitally?

We received 10 responses to this question.

7 said: 100%
1 said: 40%
1 said: 20%
1 said: 1%

7. How many clips do you have online?

We received 9 responses to this question.

3 said: None
1 said: 223,000
1 said: 26,000
1 said: 6000
1 said: 5581
1 said: 961
1 said: 200

8. What are your main subject areas?

All participants answered this question.

Historical Archive:	53.8% (7)
Nature/Wildlife:	30.8% (4)
Arts/Culture:	30.8% (4)
Travel:	23.1% (3)
General:	23.1% (3)

Animation:	15.4% (2)
Lifestyle:	15.4% (2)
Other:	15.4% (2)
News:	7.7% (1)
Entertainment:	7.7% (1)
Sports:	0% (0)

9. What proportion of your collection is HD?

We received 11 responses to this question.

5 said: None
1 said: 100%
1 said: 90%
1 said: 85%
1 said: 80%
1 said: 50%
1 said: 40%

10. What proportion of your sales for the last financial year came from footage?

We received 11 responses to this question.

4 said: None
2 said: less than 1%
1 said: 1%
1 said: 0.3%
1 said: 3%
1 said: 10%
1 said: 50%

11. Are you looking to grow your footage collection over the next three years?

We received 12 responses to this question.

Yes: 66.7% (8)
No: 33.3% (4)

12. How do you source your footage?

We received 11 responses to this question.

Professional stock cameramen/videographers:	63.6% (7)
Self-shot and commissioned footage (paid for and owned by the library):	45.5% (5)
Stock stills photographers new to video:	27.3% (3)
Acquired archives (wholly owned collections bought for the library):	27.3% (3)
Production companies/TV channels (footage shot	27.3% (3)

for other uses, e.g. news, sport, films etc.):	
Public Domain:	18.2% (2)

13 a) What percentage of your footage collection is wholly owned?

We received 10 responses to this question.

4 said: None
4 said: 100%
1 said: 90%
1 said: 5%

13 b) What percentage of your footage collection is represented?

We received 8 responses to this question.

4 said: 100%
2 said: None
1 said: 95%
1 said: 10%

13 c) What percentage of your footage collection is exclusive?

We received 9 responses to this question.

3 said: None
2 said: 100%
1 said: 100% (sole agency rather than full exclusive)
1 said: 99
1 said: 60%
1 said: 50%

13 d) What percentage of your footage collection is non-exclusive?

We received 7 responses to this question.

3 said: 100%
1 said: 50%
1 said: 40%
1 said: 1%
1 said: None

15. What percentage of your footage collection has audio?

We received 11 responses to this question.

3 said: None
2 said: 100%

2 said: 50%
1 said: 80%
1 said: 75%
1 said: 18%
1 said: 13%

16. Are there separate rights to be cleared for audio?

We received 11 responses to this question.

7 said: No
1 said: Yes
1 said: n/a
1 said: Sometimes
1 said: For a small amount (maybe 5%)

17. Do you permit clients to strip out audio?

We received 10 responses to this question.

Yes: 80% (8)
No: 20% (2)

18 a) What percentage of your collection is available as RM?

We received 8 responses to this question.

5 said: 100%
1 said: 75%
1 said: 25%
1 said: None

18 b) What percentage of your collection is available as RF?

We received 6 responses to this question.

3 said: None
1 said: 100%
1 said: 76%
1 said: 25%

18 c) What percentage of your collection is available as Microstock?

4 agencies answered this question, all of them stating that none of their collection is available as Microstock.

18 d) What percentage of your collection is available as Subscription?

4 agencies answered this question, all of them stating that none of their collection is available as Subscription.

19 a) What percentage of your sales come from RM?

We received 8 responses to this question.

3 said: 100%
2 said: 90%
1 said: 99%
1 said: 20%
1 said: None

19 b) What percentage of your sales come from RF?

We received 7 responses to this question.

3 said: None
2 said: 10%
1 said: 80%
1 said: 1%

20. Do you charge broadcast fees according to number of transmissions or license period?

We received 13 responses to this question.

License period:	69.2% (9)
Transmission:	30.7% (4)

21. Do you charge additional fees for catch up or on demand rights?

We received 9 responses to this question.

No:	66.7% (6)
Yes:	33.3% (3)

22. If yes, how much extra do you charge?

Only 2 agencies answered this question. One charges 100%; the other charges 50% of the full fee.

23. How do you charge for footage?

We received 10 responses to this question. 50% (5) of the respondents charge by second, 50% (5) by clip and none by subscription.

24 a) What length are the clips in your collection - Average:

We received 8 responses to this question.

2 said: 20 seconds
2 said: 15 seconds
1 said: 3-4 minutes
1 said: 1min
1 said: Various - all our material is 16mm historical film.
1 said: depends

24 b) What length are the clips in your collection - Minimum:

We received 4 responses to this question.

3 said: 10 seconds
1 said: 3 seconds

24 c) What length are the clips in your collection - Maximum:

We received 4 responses to this question.

2 said: 60 minutes
1 said: 30 minutes
1 said: 2 minutes

25. Do you generally negotiate rates?

We received 9 responses to this question.

Yes: 88.9% (8)
No: 11.1% (1)

26. Is your rate structure based on your stills price structure or was it constructed from scratch?

We received 9 responses to this question. 7 said they constructed their price structure from scratch, with 1 adding it was scratch - NUJ rates. 1 said it was constructed from scratch, but some media such as apps are related to stills (plus 50%).

27. Do you have an order minimum?

We received 9 responses to this question.

No:	66.7% (6)
Yes:	33.3% (3)

28. If yes, how is the limit defined?

1 respondent said the limit is 1 minute; 1 said it is seconds and 1 one said, for per second billing, we define each per second price bracket as having a minimum total number of seconds. The minimum for a per clip price is one clip.

29. What percentage of your TV production requests are for perpetuity rights?

We received 6 responses to this question.

2 said: None
1 said: 90% but 'in perpetuity' not given
1 said: 80%
1 said: about 70%
1 said: 30%

30. Do you accept filming commissions?

We received 10 responses to this question.

No:	80% (8)
Yes:	20% (2)

31. What percentage of footage research is done by your in-house research team?

We received 9 responses to this question.

4 said: 100%
2 said: 50%
1 said: 90%
1 said: Don't know. Most, I would say.
1 said: None

32. What percentage of your footage sales are coming from new customers (i.e. customers who have not previously bought stills)?

We received 9 responses to this question.

3 said: 50%
2 said: 100 %
1 said: 80%
1 said: 15%
1 said: 10%
1 said: Very little - mainly existing customers

33. Where are your new footage customers finding you? (e.g. archive portals, search engines, You Tube, direct marketing etc)?

We received 8 responses to this question.

3 said: Archive portals
1 said: New business sales effort
1 said: Direct marketing, trade shows, business development calls.
1 said: Marketing & SMO
1 said: All of the above, plus word of mouth and industry events.
1 said: Archive portals, search engines, direct marketing

Footage Survey Part 2

Footage pricing RM:

1. Do you sell rights managed footage?

5 out of 5 answered this question.

Yes: 80% (4)
No: 20% (1)

2. If yes, how much do you charge for: Television editorial UK (broadcast TV)?

1 month:	£100
1 year:	£135 - £175
5 years:	£140 - £200
10 years:	£75 - £225
In perpetuity:	£165 - £250

3. How much do you charge for: Television editorial World (broadcast TV)?

1 month:	£200
1 year:	£300 - £330

5 years:	£350
10 years:	£240 - £375
In perpetuity:	£395 - £400

4. How much do you charge for: Television editorial UK (all media)?

1 month:	£150
1 year:	£250 - £265
5 years:	£280 - £300
10 years:	£245 - £350
In perpetuity:	£320 - £400

5. How much do you charge for: Television editorial World (all media)?

1 month:	£250
1 year:	£375 - £425
5 years:	£450
10 years:	£475 - £550
In perpetuity:	£495 - £600

6. How much do you charge for: Television advertising UK (broadcast TV)?

1 month:	£800 - £1395
1 year:	£1100 - £1860
5 years:	£1300 - £2140
10 years:	£1500 - £2250
In perpetuity:	£1700 - £2480

7. How much do you charge for: Television advertising World (broadcast TV):

1 month:	£1000 - £1645
1 year:	£1400 - £2830
5 years:	£1600 - £2510
10 years:	£1800 - £2635
In perpetuity:	£2000 - £2900

8. How much do you charge for: Internet (corporate or commercial)?

1 month:	£90 - £165
6 months:	£180 - £185
1 year:	£195 - £225
3 years:	£245 - £375

9. How much do you charge for: Internet (editorial or educational)?

1 month:	£60
6 months:	£90
1 year:	£120 - £135
3 years:	£140 - £180

10. How much do you charge for: E-books (1 - 5 clips, one language)?

5 years:	£100 - £110
10 years:	£125 - £120
No limit:	£125 - £150

11. How much do you charge for: E-books (1 - 5 clips, all languages)?

5 years:	£120 - £125
10 years:	£150 - £135
No limit:	£140 - £200

12. How much do you charge for: E-books (6 - 10 clips, one language):

5 years:	£90 - £120
10 years:	£110
No limit:	£125

13. How much do you charge for: E-books (6 - 10 clips, all languages)?

5 years:	£100 - £120
10 years:	£130
No limit:	£170

14. How much do you charge for: E-books (10+ clips, one language)?

5 years:	£80 - £120
10 years:	£95
No limit:	£110

15. How much do you charge for: E-books (10+ clips, all languages):

5 years:	£90 - £120
10 years:	£110
No limit:	£150

16. How much do you charge for: Display (education and museums, single display)?

6 months:	£120 - £225
1 year:	£100 - £345
3 years:	£115 - £290
10 years:	£125 - £425

17. How much do you charge for: Display (education and museums, up to five locations)?

6 months:	£180
1 year:	£135 - £210
3 years:	£155 - £300
10 years:	£170 - £375

18. How much do you charge for: Display (commercial or corporate, single display):

6 months:	£135 - £450
1 year:	£145 - £400
3 years:	£180 - £400
10 years:	£210 - £500

19. How much do you charge for: Display (commercial or corporate, up to five locations)?

6 months:	£135 - £360
1 year:	£420
3 years:	£600
10 years:	£750

20. How much do you charge for: Stand alone apps (single language, editorial)?

1 year:	£50 - £150
3 years:	£65
5 years:	£75 - £165

21. How much do you charge for: Stand alone apps (single language, retail)?

1 year:	£75 - £145
3 years:	£90
5 years:	£100 - £180

22. How much do you charge for: Stand alone apps (single language, retail)?

1 year:	£75 - £145
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23. How much do you charge for: Stand alone apps (single language, promotional)?

1 year:	£85 - £355
3 years:	£120
5 years:	£150 - £405

24. How much do you charge for: Stand alone apps (all languages, editorial)?

1 year:	£70 - £215
3 years:	£85
5 years:	£100 - £225

25. How much do you charge for: Stand alone apps (all languages, retail)?

1 year:	£85 - £210
3 years:	£125
5 years:	£150 - £265

26. How much do you charge for: Stand alone apps (all languages, promotional)?

1 year:	£100 - £435
3 years:	£150
5 years:	£200 - £495

Footage pricing RF:

27. Do you sell RF clips?

5 out of 5 answered this question.

No:	60% (3)
Yes:	40% (2)

We have not included any RF prices as we did not receive enough responses to this part of the survey.