

BAPLA[®]

Pricing Trends Survey 2008

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INTRODUCTION

Thank you to all the BAPLA members who have contributed to this survey. It is almost seven years since the last BAPLA Pricing Trends Survey (data referring to 2001 but published in 2002), and there have been in the interim many significant changes in pricing and rights negotiation, which are reflected in the new survey and its historical comparisons.

The Survey is a historical, objective analysis and summary of current pricing trends and practices; it is not intended to provide any guidance or advice on pricing, and should not be used as such.

You will notice some presentational changes compared to the 2001 survey. Firstly, we have opted for the more flexible and environmentally friendly online presentation; and secondly, we have broadened the survey's scope to include input from clients, freelance researchers and overseas agencies, and we have included specific quotes to give the survey a more anecdotal style. Some of this additional information will be added to the BAPLA website after presentation of the core data.

We welcome feedback to the survey and enquiries regarding rights and fee negotiation issues that are of concern to BAPLA members, especially in the more complex and evolving new media areas.

Finally, I would like to thank Joanna Santander and Mark Vivian for their enthusiastic and sterling work on the BAPLA Rights Committee, without which this Survey could not have been completed. I would also like to thank Kevin Royal for his efficient, clear and cogent analysis, Charlotte Lippmann for her persistence and charm in conducting telephone interviews, and all of the BAPLA office team, past and present, who have provided fantastic practical support, and in particular Linda Royles, Angela Anderson, Christina Berry and Pauline Shakespeare.

Tim Harris
Chairman of BAPLA Rights Committee
October 2008

METHODOLOGY

The 2008 BAPLA Pricing Trends Survey has been compiled, in the main, from responses gathered from a series of online questionnaires sent to BAPLA Members between the end of 2007 and September 2008.¹ All questionnaires were returned anonymously.

What follows here is a brief outline explaining how the results from these questionnaires have been presented.

To begin with, each section details in its heading the number of people who responded to the questionnaire as a whole.

ELECTRONIC MEDIA (sample size = 69)

In the example shown above, the questionnaire attracted 69 respondents.

There then follows the question, in a black box, just as it was asked in the original questionnaire. Beneath the question you will find the total number of people who responded to that question in particular. For example, for the question detailed below, 56 people (of the 69 who took part in the questionnaire as a whole) provided an answer to the question posed.

Do you supply images for use on personal websites and/or blogs?

There were 56 responses to this question.

In the majority of cases, a summary of the answers to the question will appear next in a grey box. Totals are given both as a percentage and the actual number that percentage represents (in brackets) immediately afterwards.

Yes: 32% (18)

No: 68% (38)

Where the question asks for the respondent to provide a figure (e.g. a fee charged or a percentage discounted), averages to the responses have been calculated and presented within the confines of a blue box. The following example is the response to a question asked about television flash fees:

UK only	£76
USA only	£99
World	£180

The figures quoted represent the average values of the responses received.

¹ The 'Books & Partworks' section was compiled by combining results from both an online questionnaire and an email sent to Members. The 'International Picture Rights' survey was aimed at recipients of the CEPIC mailing list.

Next will come a series of bullet points in which the responses to the question are analysed more deeply. For example, this is the response to the question illustrated above regarding websites and/or blogs:

- Of the 15 respondents who said 'yes' and supplied further details, 40% said they charge a flat fee for such usages. Fees quoted ranged from £30 to £60, with the average being £44.
- 20% said they apply their standard commercial web rates in such instances (with unspecified discounts being available in some cases).
- 13% said they charge their usual academic/educational web-based rate for such usages.

Finally, where historical data from the 2001 survey exist, they have been used to draw comparisons with current data in order to show how the industry is faring over time. Such comparisons are displayed in the form of graphs and pie charts.

When calculating average figures throughout this survey, both the lowest and highest values returned (i.e. the outliers) were discarded from the responses given prior to such calculation (as the average is subject to the influence of extreme values at either side of the middle range). It is probably worth noting, however, that in all bar a handful of instances the removal of these outliers had a relatively small effect when calculating the average figure. In the instances where too few responses were received in order to calculate a meaningful average, these figures have simply been presented as they were given and should therefore not be taken as representative of the industry as a whole.

Unless stated otherwise, it is assumed all images are licensed on a non-exclusive basis.

Unless stated otherwise it is assumed all usages are for UK only.

All fees quoted are excluding VAT.

Finally, a number of the more open-ended questions generated a series of perceptive comments. Some of these comments have been selected for inclusion in the survey and are presented throughout its length within the confines of green text boxes, such as the one depicted below.

"The BBC have a plethora of new electronic media rights."

It should be noted, however, that such comments are for the purposes of illustration and should not be taken to be representative of the industry as a whole.

SUMMARY OF SURVEY QUESTIONS

This section comprises a collated list of the questions asked in the various questionnaires sent to Members as part of the process of compiling the information for this survey. For reasons of space (and clarity of presentation), some of them are simplified versions of the longer, more detailed questions that appear in the main body of the survey. All questions listed here are hyperlinked so that on-screen and online users can simply click on the question they are interested in to be taken directly to the relevant page.

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GENERAL OVERVIEW (sample size = 127)

The first section of the survey covers the general approach to fees for picture usage, including the policies regarding discounts and preferred supplier deals. It also incorporates other areas of pricing associated with the supply of images such as service, layout and artist's reference, and concludes with information about Royalty Free and microstock.

Do you have a price list?

There were 127 responses to this question.

Yes: 72% (92)

No: 28% (35)

- Of the respondents who answered 'yes' to this question, 30% said that their price list was available online.

Do you have a base minimum fee for Rights Managed, first-use only usage that you do not go below in principle?

There were 117 responses to this question.

Yes: 60% (71)

No: 40% (46)

- Sixty-three respondents quoted a minimum fee. These fees ranged from £25 to £100, with the average being £49.
- Furthermore, 37% said their minimum fee has remained unchanged over the last two years.
- 20% said this figure has fallen over the last two years, with the average price fall being 27%.
- 4% said their minimum fee has risen over the last two years.

Do you approach pricing for overseas clients differently to the way that you deal with UK clients?

There were 117 responses to this question.

Yes: 49% (57)

No: 51% (60)

If so, please list any specific areas where your pricing for overseas clients is different (e.g. by territory or by medium of use).

There were 55 responses to this question.

- 64% of respondents to this question generally said that the territory or country plays a major part in deciding pricing for their overseas clients (with a few referring specifically to the USA as a nation they apply higher rates to).
- 12% said the local economy of the country in question will be a factor in determining the fees they charge.

“Administrative cost of fulfilment. More forms to fill in means greater admin costs for us. Some overseas countries/companies are more bureaucratic than others.”

- 11% specifically mentioned developing (or less wealthy) countries as those which they reduce their prices for.
- 9% said they charge more to their overseas clients to cover costs such as postage and packing, BACS payments and fluctuating exchange rates etc.
- A couple of respondents mentioned medium of use, limited language print runs and language rights in general (e.g. 'World Catalan would be priced differently to World English') as factors which affect their overseas pricing.
- Other comments included 'our fees for newspapers abroad - particularly in Asia - are higher than in UK', that 'overseas clients tend to have lower budgets and therefore our pricing has to be more flexible' and that 'the far east is often packaging for US publishers; we try not to give the pictures away when we know they will be used in American book with big print runs just being packaged in Singapore'.

Which of these factors have significant influences on the prices you charge (please tick all that apply)?

There were 110 responses to this question.

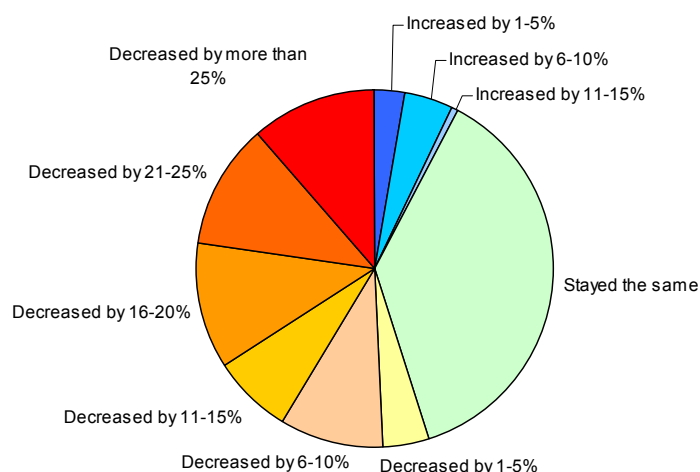
Your own price guide: 58% (64)
Your clients' demands: 72% (79)
Your competitors: 44% (48)
BAPLA Pricing Trends Survey 2001: 34% (37)

“Market forces. Picture businesses who get a reputation for being inflexible don't get their images used, however good the images may be.”

- Other factors mentioned that might influence prices included the nature of the client concerned (e.g. academic/educational clients might be charged less than a commercial one), and whether or not a loyalty discount scheme was in place.

How have the average prices that you obtain per picture changed since 2005?

There were 110 responses to this question.



In what ways have your pricing structures and policies changed since the last BAPLA survey in 2001?

There were 83 responses to this question.

- Almost a quarter of respondents said they had experienced either no change or no significant change in their pricing structures since 2001.
- 11% simply said they have noticed a small decrease in prices.
- 11% said that greater competition has had a (downward) effect on their prices (particular reference was made to larger agencies offering cheaper deals).
- 10% said they had become more flexible regarding their pricing.
- 10% said bulk deals were now more prevalent.
- 10% said that the advent of new media over this period is having an effect on their prices (e.g. more types of usage, clients demanding extra web use for no extra money etc.).
- 8% said that clients are demanding more rights generally for less money (they seem to be better informed of the marketplace and so feel more inclined to dictate prices; an increasing number actually have their own price books).
- 8% said they use the 2001 BAPLA Pricing Trends Survey less often than they used to as it's out of date (particularly regarding new media).
- 7% said that they'd simplified their pricing structures (with more flat fee deals being the order of the day).
- 6% simply said they have noticed a small increase in prices.
- Other factors mentioned included the fact that that a greater degree of negotiation now takes place, more subscription-based deals are evident and that search & service fees have effectively become a thing of the past.

"It is a buyer's market, not a seller's market, and we have to sell to stay alive."

"Clients are demanding more for less – wanting to pay the same price but for increased usage."

"Pricing structures have become simpler with more flat fee deals, there is much more flexibility for quantity discounts, and the percentages for additional or bundled rights have reduced."

"After a significant downward trend, prices seemed to have reached a plateau now."

"Pricing is all over the place at the moment."

Do you charge for the omission of a credit line?

There were 108 responses to this question.

Yes: 21% (23)

No: 79% (85)

If so, is this charge a set fee or a percentage?

There were 23 responses to this question.

Set fee: 30% (7)

Percentage: 70% (16)

- Of the respondents who provided further details, set fees quoted ranged from a discretionary amount to £150.

- Of those who specified a percentage, this percentage ranged from 15% to 100%, with the average being 51%. Over half these respondents said they charge a 50% fee for omission of a credit line.
- However, almost a third of Members said that even though they have the facility in place to charge for the omission of a credit line, they either don't impose such a charge or feel it would be a waste of time if they did (as such charges are generally difficult to recover).

Do you make a charge for any unauthorised uses of your images?

There were 106 responses to this question.

Yes: 83% (88)

No: 17% (18)

"It's hard to get really heavy because of UK non-penalty fee legality."

- Of the 73 respondents who provided further details, a third said they simply issue invoices at normal usage rates for any unauthorised uses.
- A quarter said that they invoice at normal rates and also impose a penalty charge for unauthorised usage (one member even mentioned charging for omission of a credit line). Penalty charges mentioned took the form of either an unspecified flat fee or a percentage (ranging from 50% to 300%, with a 100% surcharge being the most popular option).
- 15% said they would contact the user to say they would be issuing an invoice at normal usage rates.
- 14% said they would contact the user and take proceedings from there. A couple of members stressed the need for diplomacy here so as not to risk losing a potential future client.
- 11% said they would contact the user and attempt to negotiate a fee. In instances where such negotiations prove fruitless, further steps would then be taken (ranging from a simple request that the image be removed [it was almost entirely assumed that such an infringement would be web related here] to the threat of legal action).
- 5% said they would try to get money first, but if that failed they would then take legal action.
- 5% said they would go straight to legal action.
- 4% said they would contact the user and offer them the choice of either paying for the usage or removing the image [from the website].

Do you offer image exclusivity?

There were 106 responses to this question.

Yes: 20% (21)

No: 37% (39)

Sometimes: 43% (46)

Do you charge for any additional services you offer (e.g. sending out CDs, the non-use of hi-res images, complex searches etc.)?

There were 106 responses to this question.

Yes: 57% (60)

No: 43% (46)

- Of the 53 respondents who provided further details, just over a third said that they still have the provision to charge a search & service fee (although only half of these said they regularly do). Fees quoted ranged from £25 to £50, with the average being £30.

- Almost a third said that they make a charge for supplying images via CD. Charges quoted ranged from £15 to £35 per disc, with the average being £24.
- A quarter apply a charge for scanning/cleaning/upscaling images. Figures quoted for such a service ranged from £10 per scan up to £50 per hour.
- 18% said that they impose a charge when hi-res images are supplied (or downloaded directly by the client) and not used. Some Members charge by the image in such cases (£17.50 per image being the only figure quoted), whereas others impose a flat fee (with £30 being both the average and the most common fee charged).
- 17% said they do not impose a search & service charge, but they do make such a charge for long or complex searches.
- 13% said they charge for any new photography that is required as a consequence of a client's brief.
- 8% said they applied a p&p or handling charge.
- Other services charged for include the supply of transparencies/prints, any work undertaken to clear rights/copyright and the supplying of images to newspapers via ftp.

Do you charge for layout use?

There were 106 responses to this question.

Yes: 32% (34)

No: 68% (72)

- Of the respondents who answered 'yes' to this question, three quarters said that their layout fee is not deductible from the final fee.

If so, does your layout fee differ according to the type of client involved?

There were 34 responses to this question.

Yes: 50% (17)

No: 50% (17)

- Just over a third of respondents who answered 'yes' to this question said that they either waive such a fee or offer a reduced rate to their regular clients.
- 29% said they charge book publishers for such a service.
- 29% said they charge advertising companies for such a service.
- Other types of client that might be charged a layout fee include magazine publishers, agencies, corporate clients or those with large budgets.

If so, do you allow clients to use Royalty Free images in layouts?

There were 34 responses to this question.

Yes: 6% (2)

No: 85% (29)

Sometimes: 9% (3)

Do you charge for artist's reference use²?

There were 106 responses to this question.

Yes: 51% (54)

No: 49% (52)

- Of the 49 respondents who provided further details, half said that they charge a flat fee for artist's reference usage. Fees quoted ranged from £35 to £100, with the average being £59. Over half of those who quoted a figure gave that figure as £50.
- Just under a quarter said that they charge a percentage of their standard reproduction fee if the image is recognisable. Percentages quoted ranged from 60% to 100%, with 89% being the average. Over half of these respondents said they charge the full reproduction fee in such cases.
- 12% said they charge a lower percentage (usually 40-50%) if the image is not recognisable.
- 10% said they do not differentiate between recognisable and unrecognisable usage.
- 6% said they either offer a discount or don't charge at all if the usage is of a non-commercial nature.
- Other respondents said the nature of the final product is a factor in determining the price they charge, whilst others negotiate such a usage.

If so, is this charge different depending on whether it is an individual or a company request?

There were 45 responses to this question.

Yes: 49% (22)

No: 51% (23)

- Of the respondents who answered 'yes' to this question and who supplied further details, the vast majority said that a non-commercial request would always be charged less (sometimes a lot less) than a commercial one.
- Other respondents said that the intended use of the image would have a bearing on the fee to be charged, as would the print run of the finished product (where applicable).

Do you offer discounts?

There were 104 responses to this question.

Yes: 98% (102)

No: 2% (2)

- Of the 97 respondents who provided further details, three quarters said that they offer discounts for bulk purchases (although the number of images that constitutes a bulk purchase varies from Member to Member).
- 35% said they offer discounts to charitable and not-for-profit organisations, academic publications, worthy causes etc.
- 13% said they offer discounts to publications which either have a low print run or limited distribution.
- 13% said they offer discounts for multiple (i.e. two or more) uses of the same image within the same project.

² Artist's reference involves the use of a photograph as the inspiration for the creation of a separate piece of artwork by the client, which may or may not be a direct copy of the original photographic image.

- 10% said they offer discounts to key or regular clients.
- 10% said they offer discounts as marketing ploys, or to entice custom from a prospective new client.
- 5% said they offer discounts to small companies or clients on very tight budgets.
- 4% said they offer discounts to beat off the competition or to secure a sale (although this would usually be a last resort).

If so, do you offer a sliding scale discount depending on the number of images used?

There were 101 responses to this question.

- Of the 57 respondents who answered 'yes' to this questions and who provided further details, these details are shown below:

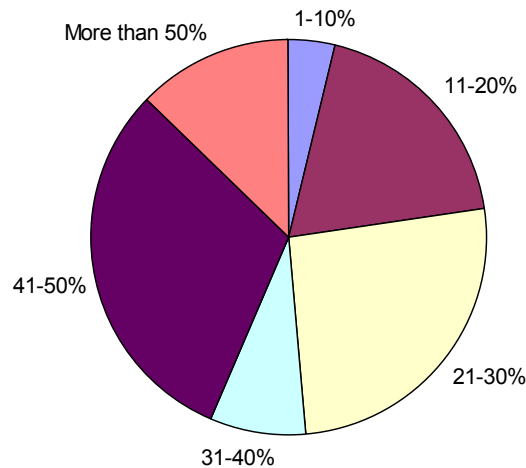
10 images	12%
50 images	23%
100 images	35%

The figures quoted represent the average values of the responses received.

- A number of respondents emphasised that the figures they gave were approximations, as other factors (such as image usage, client type, existing relationship with client etc.) would affect the figure quoted.
- Seven respondents said that they negotiate on all their bulk order discounts.

If so, what is the maximum discount you offer from your price list?

There were 101 responses to this question.



Do you offer preferred-supplier deals as an incentive?

There were 103 responses to this question.

Yes: 35% (36)

No: 65% (67)

If so, in what circumstances and with what conditions would you offer a preferred-supplier deal?

There were 30 responses to this question.

- Just over a third of respondents said that they offer preferred-supplier deals for bulk orders.
- A quarter said that they offer such deals to ensure regular work, or for the promise of more/continued work.
- 10% said such deals are offered to keep hold of, or reward, regular clients.
- 6% say they offer preferred-supplier deals with the aim of securing a guaranteed spend (either in terms of cash or volume of images ordered).
- 6% say they only offer such deals following a request by the client.
- Other respondents said they offer such deals if a project is in accordance with their principles, if the client concerned is pleasant to do business with, or if such a deal would ensure that a certain proportion of the images to be used in the project in question would be sourced from the Member.

“It is difficult to have conditions, because if they are imposed the deal breaks which may result in no further uses coming through.”

If so, do you offer a flat-rate pricing structure irrespective of the size of the deal?

There were 36 responses to this question.

Yes: 39% (14)
No: 61% (22)

If so, to which sectors do you offer these deals?

There were 27 responses to this question.

- Over half of the respondents to this question said that they offer flat-rate pricing structure deals to book publishers.
- A quarter said they offer them to magazine publishers.
- 18% said newspapers.
- 11% said TV companies.
- 11% said they offer such deals to all sectors.
- 7% said websites and/or web designers.
- 7% said online clients.
- Other sectors mentioned included PR clients, educational/charity clients, greetings card producers, publishers of partworks, and like-minded institutions.

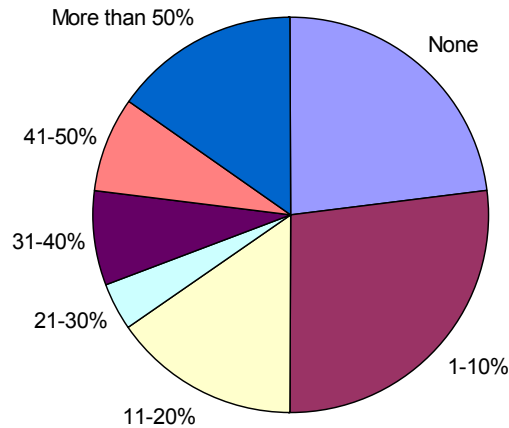
Do you currently offer a fully automated e-commerce service?

There were 103 responses to this question.

Yes: 21% (22)
No: 75% (77)
Yes, Royalty Free only: 4% (4)

If so, what percentage of your sales is done via automatic online pricing?

There were 26 responses to this question.



If so, in what sectors does this service predominate?

There were 26 responses to this question.

- Just over a quarter of respondents said that automatic online pricing predominates in the book publishing sector.
- Another quarter mentioned magazine publishers.
- 11% mentioned newspapers.
- 11% mentioned advertising/marketing.
- 11% said that their online pricing went across all sectors.
- Other sectors mentioned included creative, travel, fashion, Royalty Free, corporate and PR clients, and personal usage.

Do you offer Royalty Free images?

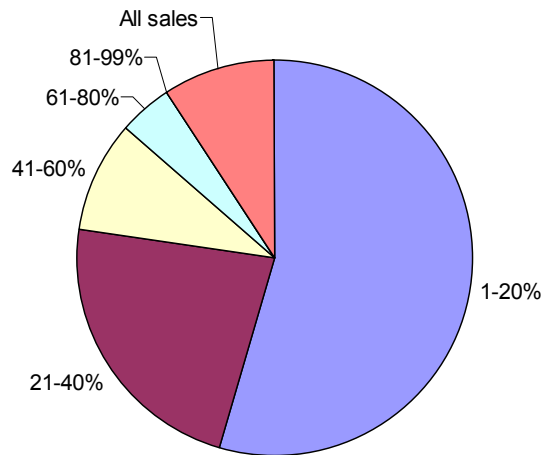
There were 103 responses to this question.

Yes: 21% (22)

No: 79% (81)

If so, what percentage of your sales comes from Royalty Free images?

There were 22 responses to this question.



If so, do you offer discounts on your Royalty Free images?

There were 22 responses to this question.

Yes: 50% (11)

No: 50% (11)

- Of the nine respondents who provided further details, two said that the maximum discount they offer on Royalty Free images is 20%.
- Other respondents mentioned bulk purchases, high usages, editorial pricing and the nature of the client in question as factors which influence the discounts they offer.

If so, do you offer Royalty Free editorial rates?

There were 22 responses to this question.

Yes: 59% (13)

No: 41% (9)

If so, do you offer seat licences³ for multiple users?

There were 22 responses to this question.

Yes: 36% (8)

No: 64% (14)

- Of the six respondents who answered 'yes' to this question and who provided further details, most said their pricing structure varies (according to collection and/or client involved etc.). The one respondent who did have a set structure said their percentages ranged from adding 5% to the fee if 15 users had access to a Royalty Free image, up to 80% if 100 users needed access.

Do you offer microstock?

There were 103 responses to this question.

Yes: 0% (0)

No 100% (103)

- Although at the time of the survey none of the respondents were offering microstock images, one Member said they were planning to license such images shortly. Of the four other comments that accompanied this question, three were less than complimentary about the whole concept of microstock.

If so, what price range do you employ?

There was 1 response to this question.

- The one respondent who is about to offer microstock images said that web use would be charged at £9 and footage at £39.

If so, has microstock affected your business?

There were 2 responses to this question.

Yes: 50% (1)

No: 50% (1)

- The comment was made that the advent of microstock has meant that pricing for Rights Managed images has had to be lowered greatly to be more competitive against microstock rates.

³ Seat licences are used for Royalty Free images to define the number of users who can access and use an image.

Do you offer a subscription service⁴?

There were 103 responses to this question.

Yes: 17% (18)
No: 83% (85)

- Of the 14 respondents who provided further details, half simply stated that their subscription deals consisted of a set number of images per month or per year.
- 14% said that the deals vary according to the type of usage and/or the client involved.
- 14% said they offer subscription deals for website use.
- Other sectors that benefit from subscription deals include newspaper publishers and educational services. One respondent said that their deals consist of a set number of images per project, whilst another said they provide subscription deals if asked, but don't promote them.

⁴ A subscription is an arrangement whereby a client pays a Member a set amount per month (or per year) to use their images (which may be limited in number or collections).

BOOKS & PARTWORKS (sample size = 86)

This section takes a look at the book and partwork publishing sector, which provides a significant level of business for many picture libraries and agencies. The increasing importance of electronic rights in this sector is reflected here.⁵

What is your average fee for the use of an image in a book with a print run of 50,000 for the listed territories?

There were 23 responses to this question.

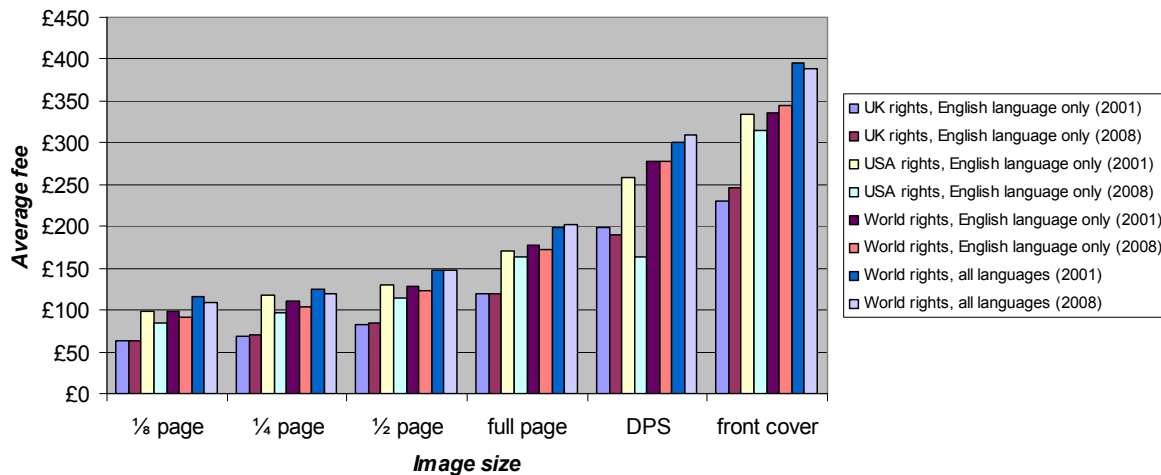
Rights	1/8 page	1/4 page	1/2 page	Full page	DPS	Front cover	Flat fee
A	£63	£70	£85	£120	£189	£246	£73
B	£85	£97	£115	£163	£264	£314	£75
C	£91	£103	£123	£172	£277	£345	£98
D	£109	£120	£147	£202	£309	£389	£108

The figures quoted represent the average values of the responses received.

- A. UK rights, English language only
- B. USA rights, English language only
- C. World rights, English language only
- D. World rights, all languages

- One respondent said they negotiate all their book fees, and a further respondent said they negotiate their fees for double page spreads and front covers.
- Two respondents mentioned that their rates were regularly discounted (by up to 30% or 50%) when dealing with regular or valued clients.

Average book fee comparison, 2001 to 2008



⁵ Two surveys were employed in the construction of this section, hence the apparent discrepancy between the numbers of responses and the overall sample size for some of the questions.

By what percentage do you adjust your 50,000 print run figures to arrive at a fee for different print runs?

There were 17 responses to this question.

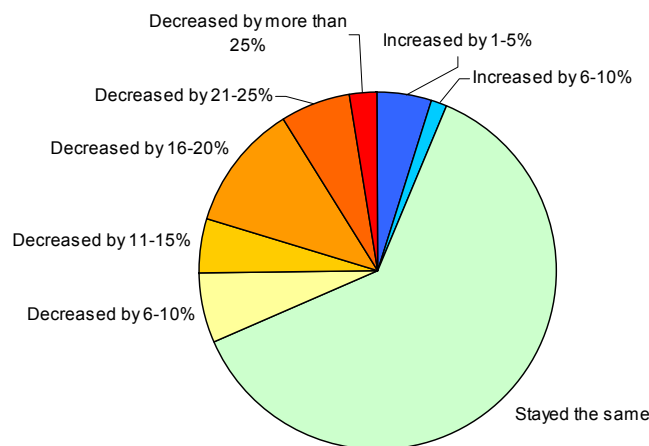
Print run up to 100,000	+24%
Print run up to 250,000	+35%
Unlimited print run	+44%
All printings and editions	+50%
All print formats (including bind-up and compendium)	+50%
All print and electronic versions	+75%

The figures quoted represent the average values of the responses received.

- Only eight respondents quoted a figure for the 'unlimited print run' category, with the remainder either saying it was not applicable or they negotiate in such instances.
- Only four respondents quoted figures for the 'all printings and editions' and 'all print formats including bind-up and compendium' categories, with five respondents saying these categories did not apply to them and one saying they negotiate in such instances.
- In the 'all print and electronic versions' category, three respondents indicated that they make use of their electronic rights prices and/or discounts when calculating the fee to be charged.

How has your average reproduction fee per image for book use changed over the last two years?

There were 86 responses to this question.



If sold in addition to printed book rights, how do you charge for one electronic medium?

There were 67 responses to this question.

- 64% of respondents said that they add a percentage of their standard book rates to the fee to cover such usages. Surcharges quoted ranged from 10% to 100%, with the average being 35%. Just over a third of respondents said that 50% is the extra amount that they charge.
- Of the remaining respondents, 10% said that the charge varies, 7% said they'd not had to deal with such usages up to now and 6% simply said that they charge more.
- Other charging methods include flat fees, negotiating and making use of a separate price list.

If sold in addition to printed book rights, how do you charge for all editorial electronic media?

There were 66 responses to this question.

- 58% of respondents said that they add a percentage of their standard book rates to the fee to cover such usages. Again, surcharges quoted ranged from 10% to 100%, but the average this time was 53%. Almost half the respondents said that 50% is the extra amount that they charge, and 13% said they'd charge double for such a usage.
- Of the remaining respondents, 8% said that the charge varies, 8% said they'd not had to deal with such usages up to now and 6% simply said that they charge more.
- Other ways of charging include applying a flat fee, negotiating and making use of a separate price list (with a couple of Members stating that they'd charge their standard electronic rights charges for such usages).

Do you charge a different rate if electronic rights are bought retrospectively?

There were 73 responses to this question.

Yes: 33% (24)
No: 67% (49)

“When electronic rights are bought at the same time, the price is often led by the client's budget and [the rights] are included in the base fee.”

- Of the respondents who answered 'yes' to this question, 68% said that they charge an additional percentage on top of the original fee for retrospective rights. Surcharges quoted ranged from 25% to 60%, with the average being 45%. A third of respondents add 50% to their original fee in such instances.
- Other respondents said that they negotiate such fees, that the charge depends on a variety of unspecified factors or that they simply charge more when granting retrospective rights.

Do you charge clients to use a facsimile of a book cover or page layout for promotional purposes?

There were 73 responses to this question.

Yes: 20% (15)
No: 80% (58)

- Of the respondents who provided further details, just under a quarter said that they would apply a nominal charge of up to 10% for such a usage.
- 18% said that they include such usages as part of their original fee.
- 9% said that they treat these instances as new usages and charge according to the size the new image is to appear at.
- 9% said they would negotiate such fees.
- 9% said their fee would depend on factors such as whether a low- or hi-res image is required, and how the layout is to be used etc.

How do you charge for non-facsimile re-use of an image from a book for promotional purposes (e.g. for use in a review, feature or catalogue cover)?

There were 13 responses to this question.

- 38% of respondents said that they charge normal book rates for such re-uses.
- 15% said that they apply a discounted book rate.
- 15% said that they negotiate.
- 15% said that they make no extra charge in these instances.
- 7% said that they apply a nominal charge.

How do you charge/calculate a price for images used in a montage cover?

There were 65 responses to this question.

- 28% of respondents said they calculate such usages by taking the standard inside rate and then adjusting it upwards. Adjustments quoted varied from a flat £12 extra to three times the inside rate. The most common approach, though, is to simply double the inside equivalent rate (an approach taken by a third of such respondents).
- 18% simply said they apply standard image size rates.
- 18% said they apply a percentage of their standard cover price (percentages mentioned ranged from 25% to full cover price).
- 17% apply a formula based on a number of factors. These factors include the cover price; the number, size and prominence of the images used; and the proportion of the images in the montage that are being supplied by the Member. A typical formula is to double the front cover rate and then divide by the number of images used.
- 8% say they apply a flat fee, with figures quoted ranging from £65 to £150.

“It depends how prominent our image is in the montage.”

How does this differ between a front and a back cover?

There were 60 responses to this question.

- 43% of respondents said that they charge the same fees for front cover usage as they do for back cover usage.
- 37% said that they charge less for a back cover montage than they do for a front cover montage. Of those that specified a difference, these differences ranged from 20% less than the front cover rates to 50%, with the average being 35%. 40% of respondents said their back cover rates are half those of their front cover rates.
- Three respondents said they adjust their standard inside rate to calculate a back cover rate, with the most common approach being to add 50% to the inside rate.
- Two respondents said they double their full back cover rate and then divide by the number of images used to arrive at a fee.
- Other methods of charging included the application of a flat fee and negotiation.
- One respondent said they apply a discount if the client uses two or more of their images in the montage.

What percentage or mechanism do you use when calculating fees for endpapers?

There were 10 responses to this question.

- Responses to this question included the following mechanisms: charge 50% of the standard inside rate if the endpaper is a re-use; simply charge the standard inside rate; charge the full page rate; charge double the DPS rate; and negotiation.

What percentage or mechanism do you use when calculating fees for chapter openers?

There were 11 responses to this question.

- The following mechanisms were among those mentioned: charge 50% of the standard inside rate if the chapter opener is a re-use; charge the standard inside rate; charge the full page rate; and add a percentage to the standard inside rate (with percentages mentioned ranging from 20% to 50%).
- Two respondents said they negotiate such fees.

What percentage or mechanism do you use when calculating fees for wraparound covers?

There were 14 responses to this question.

- The most popular approach when calculating fees for wraparound covers is to take the front cover (or full page) price and add a percentage of that price (an approach taken by 10 of the 14 respondents). These percentages to be added ranged from 25% to 100%, with 50% being suggested by half the respondents who use this method.
- Two respondents said they have a separate price grid for wraparounds, one said they apply a flat fee and one negotiates for such usages.

Do you offer exclusivity for book cover use for a specific territory?

There were 66 responses to this question.

Yes: 32% (21)

No: 68% (45)

- Of the respondents who answered 'yes' to this question and who provided further details, half specified a proportion extra that they charge. Fees quoted ranged from one-and-a-half times the standard rate to four times the standard rate, with the average being two-and-a-quarter times. Over half these respondents said they charged double their standard book cover rate for such exclusivity.
- 17% said that they charged no extra fee in such instances.
- 17% said they negotiate such deals.

Do you always use a fee structure broken down by size and limited by print run?

There were 68 responses to this question.

Yes: 59% (40)

No: 41% (28)

“In some cases we have to agree to flat fees and unlimited print runs. This is often dictated by the client's needs.”

- Of the respondents who answered 'no' to this question and who provided further details, 43% said they sometimes offer flat fees irrespective of the size of the image to be used. A couple of respondents indicated that such deals are offered at the behest of the client, whilst another couple said that they offer a flat fee structure on their bulk purchase deals.
- Just over a quarter of respondents said that they are increasingly being asked to leave out print run restrictions when licensing their images.
- 22% simply said that the size of an order will have an effect on the prices they charge.

- Other factors that influence the fee charged by Members include whether or not the publication concerned is of an academic/non-commercial nature, and where in the publication the image is to appear.

Do you offer flat fees?

There were 66 responses to this question.

Yes: 73% (48)

No: 27% (18)

- Of the respondents who answered 'yes' to this question, almost 60% said that they offer flat fees when dealing with bulk purchases. A couple of respondents said that they would expect a high proportion of the images ordered to be used in the final product.
- 11% said that they offer flat fees following such a request by the client.
- 7% said that their decision to offer a flat fee would depend on the client concerned and/or the project the image (or images) are to be used in.
- Other factors which might be considered include the following: is the client concerned a regular client? Would a guaranteed minimum spend (either in value or volume of images) apply? Would exclusivity apply (i.e. will anyone else's images appear in the finished product)? Is the supplying of newspapers and/or magazines involved? Is the deal straightforward or not? Is the intended use of an academic or non-commercial nature? Is a preferred-supplier deal in place? One Member said that flat fees are only offered as a last resort; the alternative to which is losing the deal.

If so, is this flat fee for inside use only?

There were 67 responses to this question.

Yes: 60% (40)

No: 40% (27)

If so, is this flat fee up to a certain size only?

There were 67 responses to this question.

Yes: 48% (32)

No: 52% (35)

What discounts (if any) do you offer to educational publishers?

There were 54 responses to this question.

- Just over two thirds of respondents said they offer discounts to educational publishers. Discounts quoted ranged from 5% to 50%, with the average being 19%. Just over a quarter of respondents who stated a discount figure gave that figure as 10%.
- Three Members said they don't offer discounts as such, but are prepared to negotiate them.
- A couple of other Members said that their educational clients are either on special fee agreements or are charged at the lower end of their spectrum anyway and so would not really qualify for any further discounting of their fees.

What discounts (if any) do you offer to school library publishers?

There were 53 responses to this question.

- 62% of respondents said they offer discounts to school library publishers. Discounts quoted ranged from 5% to 30%, with the average being 17%. Just under a third of respondents who stated a discount figure gave that figure as 10%.
- Three Members said they don't offer discounts as such, but are prepared to negotiate them.
- One Member said that their school library clients are on special fee agreements and so would not really qualify for any further discounting of their fees.

What discounts (if any) do you offer to publications with a low print run?

There were 59 responses to this question.

- 81% of respondents said they offer discounts to publications with a low print run (although what constitutes a low print run varies from Member to Member). Discounts quoted ranged from 5% to 50%, with the average being 25%. A quarter of respondents who stated a discount figure gave that figure as 10%, whereas 22% gave a discount figure of 50%.
- Three Members said they don't offer discounts as such, but are prepared to negotiate them.
- Two Members said they don't promote the fact that they offer discounts (but will offer a discount if the client asks for one).
- Three Members said that in instances of really low print runs (e.g. less than 1,000), either a low administration fee would be charged or the reproduction fee would be waived entirely.

How do you charge for e-book use in addition to the printed book rights?

There were 51 responses to this question.

- Just over two-thirds of respondents said they add a percentage of the printed rights fee when licensing an image for use in an e-book. Surcharge quoted ranged from 10% to 50%, with the average being 39% (three respondents pointed out that this percentage figure would be larger if such rights were purchased retrospectively). Just under half of the respondents who stated a figure gave that figure as 50%.
- 10% of respondents said that any extra fee to be charged would be dependent on factors such as print run, territory and the scale of the project etc.
- 6% said they would negotiate such a fee.
- 6% said that such rights were built in to their printed rights package.
- Other respondents said that they would charge a flat fee, or they'd calculate a fee based on their standard electronic rights prices.

How do you charge for stand-alone e-book use?

There were 51 responses to this question.

- Just under half the respondents to this question said they treat stand-alone e-book use as though it were standard printed matter and charge accordingly.
- 16% said they charge a percentage of their standard printed book fee, with almost everybody quoting 75% as the percentage that they apply.
- 10% said they use their standard book rates as a starting point and go from there. Two Members said they charge as though the image was either 1/8 or 1/4 page, whilst another said they charge as though they were dealing with a low print run.
- 10% said they charge a flat fee for such a usage (with the only reference to an actual amount simply being 'nominal').

- Other ways of deciding a fee included referring to the 2001 survey, applying electronic rights prices and negotiating.

Do you use a different pricing structure for clients based in foreign territories?

There were 65 responses to this question.

Yes: 28% (18)

No: 72% (47)

If so, how do you price differently and what currency do you use⁶?

There were 11 responses to this question.

- Depending on the country concerned, between one and three respondents said that their overseas clients were dealt with either by their overseas office or an agency based in that country.
- One respondent said that French prices are 10% lower than UK prices, four respondents said that Spanish prices are lower than UK prices (with the average difference being 28%), three respondents said that Italian prices are lower than UK prices (average difference 22%), six respondents said that American prices are higher than UK prices (with 25% being the most common figure quoted), three respondents said that Australian prices are lower than UK prices (average difference 20%) and six respondents pointed out that their fees vary according to the country they are dealing with (particular mention was made here of discounting fees for poorer or developing nations, with such discounts generally being in the region of 25%). One respondent simply said that prices were 'different' for all the named countries.
- One respondent quoted the following minimum fees that they charge: France, €125; Germany, €125; Spain €100; Italy, €100; USA, \$175; and Australia, £75.
- One respondent said that they either apply a flat fee or negotiate when dealing with their German, American and Australian clients.
- The majority of respondents said that (in the main) they trade in the currency of the country they are dealing with. Exceptions to this rule were Australia (where Sterling is the predominant currency used) and the USA (in which the Dollar is the principal currency used, although a couple of respondents also trade in Sterling).
- Other respondents noted that Dutch and Scandinavian rates are 'usually pretty good', that the Japanese market is the same as the UK market and that administration fees are sometimes applied to cover bank charges when dealing with foreign payments.
- One respondent commented that they tend to do more bulk deals with their Spanish clients than with their other overseas clients.

⁶ Members were asked to comment on their dealings with clients in the following countries: France, Germany, Spain, Italy, USA, Australia and 'Other'.

Do you have separate fee structures for partworks or continuity sets?

There were 64 responses to this question.

Partworks, Yes: 37% (24)
Partworks, No: 63% (40)
Continuity sets, Yes: 35% (22)
Continuity sets, No: 65% (41)

- Of the 24 respondents who answered 'yes' to this question and who supplied further details, 42% said they make use of their book pricing structure when determining fees for partworks and continuity sets. Half of these specified that they applied their standard book rates, whereas two Members said they applied a discounted book rate. A further respondent said they would consider such uses as re-uses within a separate edition and price accordingly.
- 17% said they have their own separate rate card for such usages, with a further two saying they refer to the 2001 survey.
- 8% said they either approach such instances on their own merits or negotiate a fee to be charged.
- Other respondents said they apply magazine rates, that the fee depends on the rights requested, that partwork companies tend to offer a 'take-it-or-leave-it' price, and that prices have fallen so low that such projects are not worth dealing with any more.

What is your average fee for the use of an image in a partwork (with no print run limit) for the listed territories?

There were 9 responses to this question.

Rights	1/8 page	1/4 page	1/2 page	Full page	DPS	Front cover	Flat fee
A	£55	£63	£77	£113	£161	£221	£65
B	£72	£81	£95	£130	£170	£267	£73
C	£73	£86	£101	£131	£180	£293	£88
D	£93	£109	£131	£177	£243	£352	£104

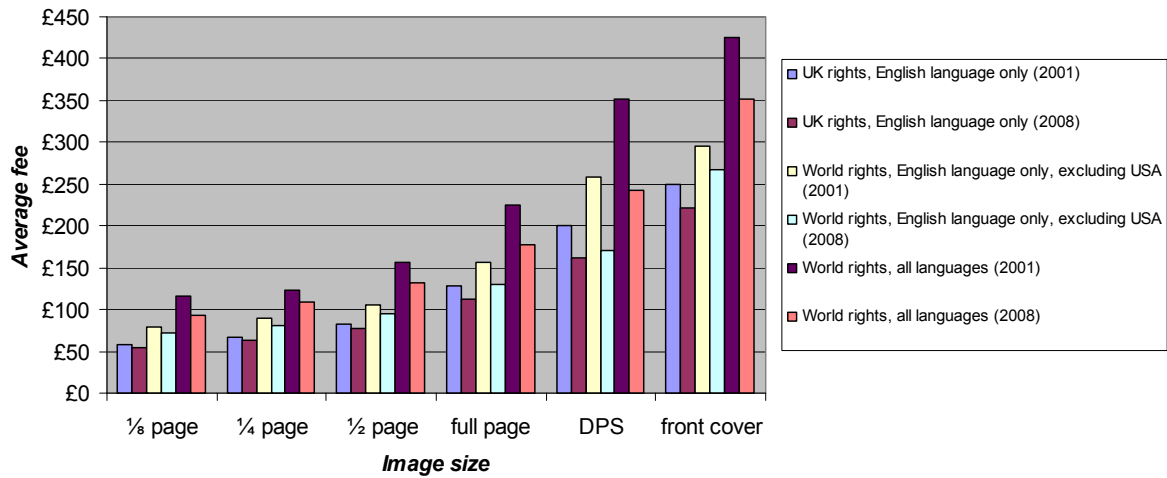
The figures quoted represent the average values of the responses received.

- A. UK rights, English language only
- B. World rights, English language only, excluding USA
- C. World rights, all languages, excluding USA
- D. World rights, all languages

- One respondent indicated that they negotiate double page spread rates for all their partwork rights bundles.
- Only four respondents quoted a flat fee figure with regard to partworks, so the result must be treated with caution due to the small sample size.
- Base fees for partworks are noticeably lower than those for books. Likewise, the fall in prices since 2001 is much more apparent here than with books. In both instances however, it is probably worth noting the possible impact of the smaller sample size on these figures.

⁷ A continuity set is a series of individual, usually quite slim, bound volumes that collect into a whole. It can be an alternative way of packaging a partwork in some territories, rather than in a magazine format. It is also a way of splitting a large book project into volumes, so it may be produced by a book publisher or packager or a partwork publisher, and is particularly common in the USA and in school library markets.

Average partwork fee comparison, 2001 to 2008



- Note: the 2001 survey did not ask for 'World rights, all languages, excluding USA' figures, hence their omission from this graph.

What percentage discounts (if any) do you offer for bulk purchases of images?

There were 60 responses to this question.

20 images	50 images	100 images	200 images	500 images
15%	22%	30%	32%	37%

The figures quoted represent the average values of the responses received.

- Eight respondents said they negotiate all their bulk purchase deals.
- Two respondents said that even though they have a set discount structure, such discounts are negotiable.
- Two respondents said that for bulk purchases of 200 or more images they tend to apply flat fee rates.
- Seven Members said that they'd never had to deal with a bulk order of 200 or more images.
- Eight respondents said they don't have a set discount structure. Of these, three said that this was because they very rarely sell their images in such large numbers, one said that discounts are worked out on a case-by-case basis, another said they had a separate rate card, another said that the discounts they offer depend on the client concerned, and one said that they start at a figure based on the rights requested and then go (downwards) from there.

Note: as the volume of images for which discount figures were requested went from 20 to 500, the number of respondents who offered a figure gradually decreased (from 44 to 19).

MAGAZINES (sample size = 64)

This section surveys current pricing trends for the use of images in all types of magazines. It covers issues such as online versions of magazines, overseas editions and exclusivity.

By what percentage has your average fee for magazine use changed over the last two years?

There were 55 responses to this question.

Increased: 12% (7)
Decreased: 33% (18)
Stayed the same: 55% (30)

- Of the respondents who said that their average fee has increased over this period, increases quoted ranged from 5% to 15%, with the average being 8.5%.
- Of the respondents who said their average fee has decreased over this period, decreases quoted ranged from 2% to 35%, with 16% being the average.

Do you have a minimum fee for magazine use?

There were 62 responses to this question.

Yes: 77% (48)
No: 23% (14)

- Minimum fees quoted ranged from £18 to £75, with an average of £48. Almost of a third of respondents quoted £50 as their minimum fee.

Does print run affect the prices that you charge?

There were 64 responses to this question.

Never: 5% (3)
Rarely: 12% (8)
Often: 38% (24)
Always: 45% (29)

Who determines your fees?

There were 64 responses to this question.

You: 34% (22)
The client: 3% (2)
It varies: 63% (40)

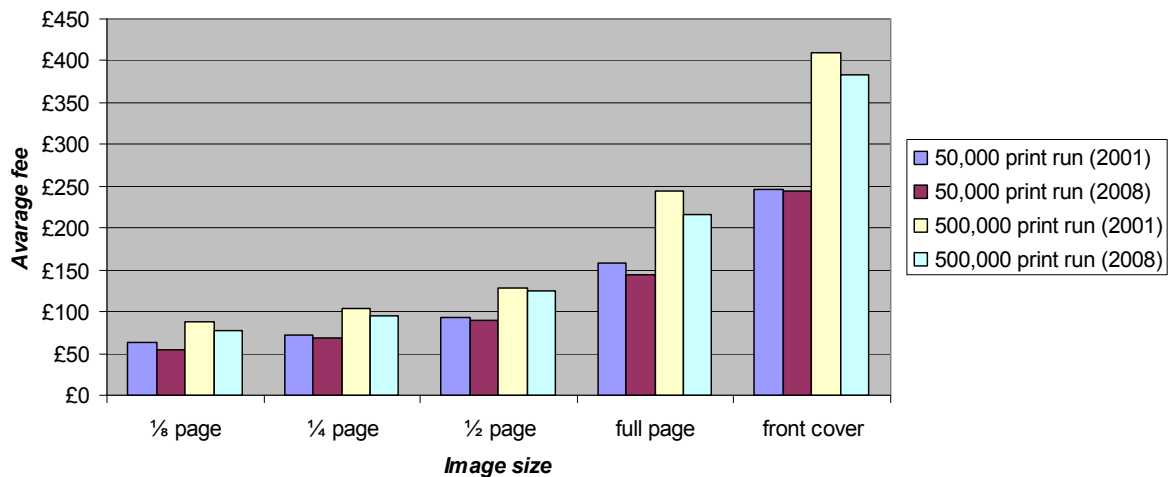
What is your average fee for UK use in a national consumer/retail magazine for print runs of 50,000, 100,000 and 500,000?

There were 52 responses to this question.

	50,000 print run	100,000 print run	500,000 print run
1/8 page	£55	£62	£78
1/4 page	£69	£79	£95
1/2 page	£89	£102	£124
Full page	£145	£174	£217
Front cover (single image)	£245	£307	£383
Flat fee (inside)	£80	£89	£99

The figures quoted represent the average values of the responses received.

Average fee comparison for UK magazine use, 2001 to 2008



- Note: the 2001 survey did not ask for fees for a 100,000 print run, hence their omission from this graph.

Are these rates different for any of the following types of magazine: educational, trade, members' magazines, contract publishers, house magazines (i.e. internal only), in-flight magazines or specialist/niche market magazines?

There were 53 responses to this question.

Yes: 68% (36)

No: 32% (17)

- Of the respondents who answered yes to this question, almost half said that they offered discounts for academic/charity use. Discounts quoted ranged from 10% to 35%, with the average being 24%.
- 9% said they have established pricing structures regarding such magazines with their regular clients.
- 9% said they would negotiate fees with the types of magazine listed.

- Comments regarding rates charged for other types of magazine included the following: trade (slightly less); in-flight (less and 40% more); free magazines which make their money from advertising (different prices and a little more), house/internal (different, less, charge between 20% and 50% more, and 'treated as a newsletter').

Do you offer discounts for volumes of images?

There were 52 responses to this question.

Yes: 90% (47)

No: 10% (5)

- Of the respondents who provided further details, the following broad pattern emerged:

Images ordered	3-5	6-10	11-15	16-20	21-30	30+
Average discount	8%	11%	15%	16%	18%	21%

The figures quoted represent the average values of the responses received.

- 21% of respondents simply stated that they do offer discounts but provided no details as to the nature that these discounts take.
- 12% said they have no fixed policy and assess each job on its own individual merits.
- Some Members said that they offer discounts on 50 or more images, with 10% being the most common figure quoted.

How do you calculate fees for a montage cover use?

There were 46 responses to this question.

Of the wide range of methods employed, the following were the most notable:

- 24% said their rate depended on the size that the image would appear at in the montage.
- 15% said they would negotiate for such a usage.
- 15% would apply a formula to arrive at a price, taking a number of factors into account. Factors mentioned included full cover price, inside rate, size of image used, number of images used and whether or not the image is also used inside the magazine etc. For example, one formula employed by two respondents is to double the standard cover rate and then divide by the number of images used.
- 13% charge double their normal inside rate for a montage cover use.
- 9% simply charge their normal inside rate for a montage cover use.
- 7% charge one-and-a-half times their normal inside rate for a montage cover use.

How do you charge for re-use in the same issue?

There were 50 responses to this question.

- 84% of respondents to this question said they would discount the re-used image. Discounts quoted ranged from 20% to 50%, with all but a handful naming 50% as the discount they apply.
- Three respondents indicated that they charge re-uses at spot fee prices (with £10 and £20 being the prices quoted), and one said they charge full rates for any re-used images.

How do you charge for contents page re-use?

There were 47 responses to this question.

- 51% of respondents offer a discount on the second use, with the vast majority setting that discount at 50%.
- 13% charge a flat fee, with £25 being the most-quoted rate.
- 11% charge 50% on top of the original use.
- 11% allow such a re-use at no extra charge.
- 6% charge a spot fee rate.

What additional charge do you make for extending rights outside the UK?

There were 33 responses to this question.

European rights:

- 61% of respondents confirmed that they do make an additional charge for extending rights to Europe. Surcharges quoted ranged from 10% to 50%, with an average surcharge of 29%.
- 15% of respondents said they make no additional charge for extending rights to Europe.

World rights, English language:

- 48% of respondents confirmed that they do make such a charge. Charges quoted ranged from 10% to 65%, with the average being 36%.
- 18% said they'd make no extra charge for such a usage.

World rights, all languages:

- 70% of respondents confirmed that that they do make an additional charge for extending rights to the rest of the world. Surcharges quoted ranged from 15% to 200%, with an average surcharge of 55%. A surcharge of 50% was quoted by almost a third of those who provided a figure.
- 12% of respondents said they would make no additional charge for such a usage.

Note: in all three cases, respondents who made no direct comment about any extra charges that they may or may not apply indicated that they either negotiate these fees, or that any additional charges would depend on factors such as the print run and the number of languages that the magazine would be translated into etc.

Do you have a different fee structure for magazine clients in other territories?

There were 50 responses to this question.

Yes: 44% (22)

No: 56% (28)

- Of the respondents who answered 'yes' to this question, a third said their fees were in line with what the going rate was in the country in which the magazine would be sold.
- A quarter made use of a broad territorial rate card that they have (e.g. EU, Eastern European, South America etc.).
- The remainder said they generally charge less without going into specific details.

What fees do you charge when an image from a UK magazine is syndicated to another version of the same title overseas?

There were 36 responses to this question.

- 36% of respondents offer a discount for such a usage. Discounts quoted ranged from 25% to 50%, with the average being 44%. Three-quarters of these respondents quoted 50% as their discount figure.
- 22% charge the same as their UK rate.
- 14% said they are guided by the going rate in the country in which the magazine is to be sold.

Do you charge an additional fee for re-use in an online version for the same time period?

There were 50 responses to this question

Yes: 88% (44)

No: 12% (6)

- Of the respondents who answered 'yes' to this question, 68% apply an additional percentage ranging from 10% to 50%, with 34% being the average. A third of these respondents apply a 50% surcharge, whilst a quarter apply a 25% surcharge.
- A quarter of respondents apply a flat-rate fee. Fees quoted ranged from £25 to £65, with £44 being the average.
- Some Members commented on the fact that a lot of clients expect to be able to re-use images online at no extra cost.

What range of fees do you charge for the stand-alone use of an image in a web version of a magazine?

There were 35 responses to this question.

- Responses to this question were extremely varied and included the following ranges: £0 to £500; £10 to 50; £25 to £30; £60 to £85 and £55 to £400. Consequently, no clear pattern emerged.

Does this range of fees differ depending on the position in the online magazine?

There were 40 responses to this question.

Yes: 53% (21)

No: 47% (19)

Do you offer Royalty Free images at an editorial one-time use rate?

There were 49 responses to this question.

Yes: 12% (6)

No: 6% (3)

Don't offer Royalty Free: 82% (40)

Do you have any company-wide price agreements which cover all titles published by a magazine group?

There were 49 responses to this question.

Yes: 24% (12)

No: 76% (37)

If yes, are you doing more business this way? Where does this initiative come from, you or the client?

There were 10 responses to this question.

- Four respondents simply stated that they were doing more business as a consequence of such agreements.
- As to where the initiative is coming from, three Members said the client provides the initiative, two said they provide the initiative and one said both they and the client provide the initiative. The remaining four respondents did not specify .

What other factors (outside of print run) affect the fee charged to a specific magazine (e.g. profile, readership, advertising revenue)?

There were 35 responses to this question.

- A third of respondents said that no other factors outside of print run affect the fees that they charge to magazines.
- 14% said that the readership of the magazine would be taken into account.
- 11% referred to the budget of the client.
- 11% said that an academic/charity magazine would qualify for a discount.
- 9% said the profile of the magazine would be a factor.
- 9% mentioned the magazine's advertising policy or advertising revenue.
- 9% cited the subject matter of the magazine as a possible factor.
- Other factors that received a mention included the price the magazine is to be sold at and whether or not the client in question pays their bills on time.

Do you sell images to magazines on an exclusive basis?

There were 50 responses to this question.

Yes: 18% (9)

No: 82% (41)

- Of the nine respondents who answered 'yes' to this question and who quoted fees, these fees ranged from £400 to £2,250.
- Three respondents said they charged between 30% and 50% on top of the standard fee.
- The remaining respondents simply said that such fees vary or that they are negotiated.

What is the highest fee you have obtained for a magazine's exclusive use of an image in the past 12 months?

There were 8 responses to this question.

- Figures supplied ranged from £100 for a single image to £12,000 for a set of images.

Do you charge differently according to the frequency of publication of a magazine?

There were 49 responses to this question.

Yes: 6% (3)

No: 94% (46)

Are there any areas/types of magazine that have particularly low fees?

There were 46 responses to this question.

Yes: 72% (33)

No: 28% (13)

- 29% of respondents said that a number of specialist titles that they deal with have particularly low fees.
- 26% mentioned academic/educational titles.
- 23% mentioned charity titles.
- 14% mentioned any title with a low print run.
- 9% mentioned listings magazines.
- Other types of magazine to get a mention included 'freebies', regional magazines, corporate magazines and 'low quality' magazines in general.

Do you offer a commission service to your magazine clients?

There were 50 responses to this question.

Yes: 22% (11)

No: 78% (39)

In these instances, does the magazine retain the rights to the images?

There were 50 responses to this question.

Yes: 9% (1)

No: 73% (8)

Sometimes: 18% (2)

- Of the respondents who supplied further details regarding the percentage of their magazine revenue that comes from commissions, the figure of 5% was mentioned on two occasions.

Have you noticed any other general trends or changes in pricing in the magazine sector over the last two years?

There were 38 responses to this question.

- 24% of respondents simply stated that prices seem to have fallen without going into any specific reasons as to why this might be the case.
- 21% said they had not noticed any discernible change in the market.

“Magazines are saying that competitors are not charging them for online re-use, making it very difficult to get clients to pay for this increasingly lucrative market; sets a dangerous precedent for future online usage.”

- 18% said that clients are increasingly dictating what they will pay, either by bullying or pleading poverty.
- 13% noted that the larger agencies are squeezing them out as they can offer better deals on bulk orders, subscriptions etc.
- 8% indicated that magazine clients are trying to squeeze more out of the rights deals that accompany the images.
- 8% indicated that their magazine clients expect to pay no further charge for online use over and above the magazine use.
- Other changes mentioned included the introduction of online pdf usage, the advent of microstock, the fact that some competitors don't charge extra for online use and that there is just less business in general.

Are there any areas of pricing for magazines where you have experienced difficulties?

There were 12 responses to this question.

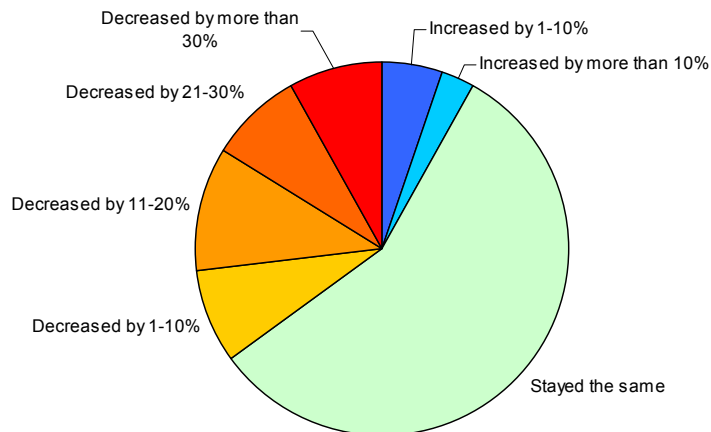
- Almost half of respondents said that magazine clients either do not want to pay extra for online usage, or just assume they don't have to pay any extra and consequently don't declare such usages.
- A third of respondents said that simply arriving at a fee can be difficult at times as clients are increasingly reluctant to pay the going rate.
- Other areas which got a mention included online pdf usage and the fact that nobody wants to pay search and service fees any more.

NEWSPAPERS (sample size = 41)

This section of the survey covers pricing policies for both national and regional newspapers. It addresses issues such as online versions of newspapers, self-billing policies, picture crediting and pricing by subscription.

How have your prices for newspaper clients changed over the last two years?

There were 37 responses to this question.



Have you seen an increase in flat fee or simplified fee structures over the last two years?

There were 35 responses to this question.

Yes: 46% (16)

No: 54% (19)

“Newspapers usually tell me how much they will pay.”

- Of the respondents who have noticed an increase in this area, the general feeling is that a flat fee system has taken over, with the newspapers dictating what this system should be (with self-billing playing an important part), although some newspapers do request a fee structure from the Members.

Do you have a minimum fee for national newspaper use?

There were 37 responses to this question.

Yes: 62% (23)

No: 38% (14)

- The minimum fees quoted ranged from £25 to £95, with the average being £59. The most common figure quoted was £50 (and was given by 40% of respondents).

Do you have a different fee structure for regional newspapers?

There were 36 responses to this question.

Yes: 72% (26)

No: 28% (10)

- 80% of respondents who said they do have a different fee structure simply said they charged regional newspapers less than they do the nationals. The remaining 20% either said they made use of a separate rate card or negotiated according to circulation.
- Of the respondents who divulged their percentage discount, half said they would offer a 20% discount for a regional paper.
- Percentage discounts quoted ranged from 10% to 25%, with the average being 19%.
- Flat fees ranged from £30 to £50, with the average being £42.

Do you break your price down by the size of image used (please tick all that apply)?

There were 40 responses to this question.

Yes, by the square inch: 45% (18)

Yes, by the page size (¼, ½ etc.): 55% (22)

Yes, by the column inch: 13% (5)

No, a flat fee applied: 25% (10)

- The fact that a number of respondents selected more than one option would seem to indicate that pricing structures vary according to the usage and/or the client concerned.

Do you have different fee structures for different (non-news) sections of a newspaper?

There were 40 responses to this question.

Yes: 24% (9)

No: 76% (29)

- Of the respondents who apply a different fee structure in these instances, 50% said that they apply magazine rates.
- A small number of respondents said that they apply newspaper or image/page size rates.

If so, what is your average fee for a head shot, a half page (tabloid) and a full page (tabloid) for inside use?

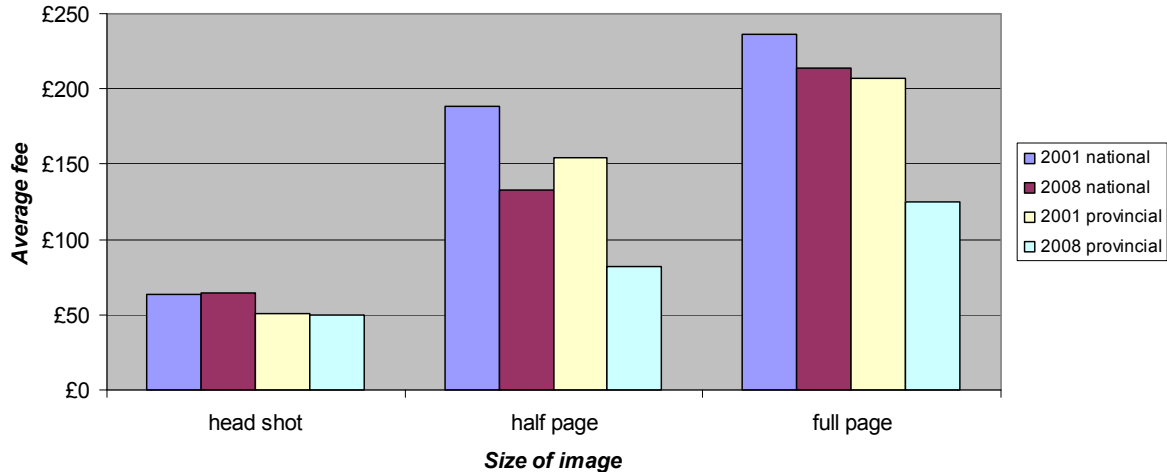
There were 28 responses to this question.

	National	Provincial
Head shot (up to 2 sq in)	£64	£50
Half page (up to 70 sq in)	£133	£82
Full page (up to 150 sq in)	£214	£125

The figures quoted represent the average values of the responses received.

- A few respondents took the opportunity here to reinforce the notion that newspapers now tend to set their own rates when it comes to pricing.

Average UK newspaper fee comparison, 2001 to 2008



Do you charge more for a newspaper front cover?

There were 33 responses to this question.

Yes: 67% (22)

No: 33% (11)

- For those that do charge extra for a newspaper front cover, the standard process is to add a percentage on to a normal usage fee for a similar sized image. Percentage increases quoted ranged from 20% to 100%, with the average being 60%.

Do you charge more for a newspaper section cover?

There were 32 responses to this question.

Yes: 38% (12)

No: 62% (20)

- Again, for those that do charge extra for a newspaper section cover, the standard process is to add a percentage on to a normal usage fee for a similar sized image. Percentage increases quoted ranged from 25% to 100%, with the average being 62%.

Do you charge for additional usage in an online version of a newspaper?

There were 34 responses to this question.

Yes: 77% (26)

No: 23% (8)

- Of the respondents who answered 'yes' to this question and who supplied further details, 56% said the extra charge was related to the original fee. Surcharges quoted ranged from 10% to 50% of the original fee, with the average being 29%.
- 22% of those that supplied further details said they apply a flat fee, with a fee of between £25

- and £50 being the generally agreed upon figure.
- Other respondents simply stated that the fee was either negotiable or it depended upon the client in question.

If so, is this additional usage fee dictated by the client?

There were 31 responses to this question.

Yes: 42% (13)

No: 58% (18)

“High usage promises with extreme low pricing is common. We call this 'kamikazi rates' – suicidal for business.”

- No general pattern emerged from further comments to this question, save a reiteration of the general feeling that newspapers dictate what they will pay for the use of an image, with general Member comments ranging from 'too cheap' to 'extra usage not being declared'. Some Members stated that if an image is used online only, then normal print rates will apply. Some Members negotiate (or try to negotiate), whilst others feel that if they charge too much the newspaper will go elsewhere and so are forced to accept a lower rate than they would ideally like.

Do your newspaper clients ever license images for stand-alone web use?

There were 35 responses to this question.

Yes: 23% (8)

No: 77% (27)

- Of the respondents who do license images for such a use, charges quoted ranged from £40 to £70, with the average being £55.

Do you take the print run into account when pricing for newspapers?

There were 35 responses to this question.

Never: 32% (11)

Rarely: 40% (14)

Often: 14% (5)

Always: 14% (5)

Do you accept the fee structures suggested by your clients?

There were 36 responses to this question.

Never: 6% (2)

Rarely: 28% (10)

Often: 58% (21)

Always: 8% (3)

Do self-billing arrangements affect the fees paid by your newspaper clients?

There were 37 responses to this question.

Yes: 49% (18)

No: 51% (19)

“Invoicing our own fees is usually useless.”

- Of the respondents who said self-billing arrangements do affect the deals paid by their clients, 60% said the situation is effectively out of their hands; the client has determined how much they are going to pay and it's a case of accept it or lose their custom.
- 26% said that newspaper clients pay less than what they, as suppliers, would like to charge.
- Other Members mentioned that newspapers regularly send the wrong amounts and aren't entirely up front with their usages (and as checking is a costly process such discrepancies are often allowed to slide).

Do the amounts paid through self-billing arrangements match your agreed fees?

There were 31 responses to this question.

Never: 10% (3)

Rarely: 23% (7)

Often: 52% (16)

Always: 16% (5)

Do you follow up on any discrepancies?

There were 31 responses to this question.

Never: 7% (2)

Rarely: 35% (10)

Often: 14% (4)

Always: 45% (13)

Do you charge differently for declared/undeclared usages?

There were 36 responses to this question.

Yes: 19% (7)

No: 81% (29)

- Of the respondents that said they do charge differently for declared/undeclared usage, 33% said they'd charge double for the undeclared usage.
- A couple of respondents said a further invoice would be a waste of time as it would probably not be paid anyway.

Do you charge differently for images that appear without a credit?

There were 36 responses to this question.

Yes: 11% (7)

No: 89% (29)

- Too few respondents said they would apply a charge for any worthwhile pricing structure to emerge.
- Half of the respondents said they would limit their responses to a grumpy email, although none would seriously expect to receive any extra money from such a complaint.
- Again, the opinion was voiced that invoicing would be a waste of time as such invoices probably wouldn't be paid anyway.

Do you monitor how your images are used by newspapers?

There were 34 responses to this question.

Yes: 50% (17)

No: 50% (17)

- Of the respondents who said they do monitor how their images are used by newspapers, 74% said they regularly check the newspapers and/or browse online.
- 16% request a tear sheet.

Do you sell images on an exclusive one-off basis?

There were 37 responses to this question.

Yes: 8% (3)

No: 92% (34)

How do you calculate fees for an exclusive?

There were 3 responses to this question.

- One respondent said that their prices for exclusives are negotiated on a title-by-title basis (with each title having its own averages and limits), whilst the other respondents simply said they have no set system in place and would take each case on its own merits.

“Exclusive paparazzi images are played out against bidders.”

What is the highest price you have achieved in the last year for an exclusive individual image or an exclusive set of images?

There were 3 responses to this question.

- Prices for an individual image ranged from £500 to £7,000, and prices for a set of images ranged from £1,000 to £10,000.

Do you charge differently for next-day uses of news images as opposed to stock images?

There were 36 responses to this question.

Yes: 14% (5)

No: 86% (31)

- Two respondents said that their next-day usage fees vary according to circumstances, context etc., one said their next-day usage fee would usually be 50% more than that for a stock image, one quoted an average price of £150-£175 (which would vary from title to title), and one said they would charge more 'only if it was special'.

Do you price differently depending on different images/collections (e.g. sport, celebrity etc.)?

There were 35 responses to this question.

Yes: 11% (4)

No: 89% (31)

- The only real pattern that emerged here was that celebrity images can occasionally command a higher price than other types of image (although how much higher a price was not specified).

Do you offer a subscription service to your newspaper clients?

There were 37 responses to this question.

Yes: 16% (6)

No: 84% (31)

- Of the respondents who said that they do offer a subscription service, half said that they make their entire collection available for such a use.
- A third said that they charge such a fee on a monthly basis.
- One Member said that their subscription service only consists of wholly owned news images.

If so, what is your subscription fee for a month and how many downloads/images used does this cover?

There were 4 responses to this question.

- The only discernible pattern to emerge here was that limits do not tend to be imposed on the number of downloads permitted.
- The two prices quoted were £1,000 and £1,650 (both for unlimited downloads).

If so, what percentage of your newspaper sales comes from subscriptions?

There were 4 responses to this question.

- Responses here ranged from 5% to 85%.

Do you have any other comments about changes in newspaper pricing structures over the last two years, or any problems you have experienced in pricing for this medium?

There were 4 responses to this question.

- A couple of respondents took the opportunity here to reiterate their concerns that newspapers are increasingly adopting a 'take it or leave it' attitude.
- One said that newspaper clients don't like to pay for archive images if they have subscription contracts, and another said that, thanks to the larger agencies, they do very little newspaper work these days.

TELEVISION (sample size = 39)

This section covers the use of images in television in an editorial context, i.e. within programmes made for television. Advertising on television is covered in the *Advertising and Promotion* section.

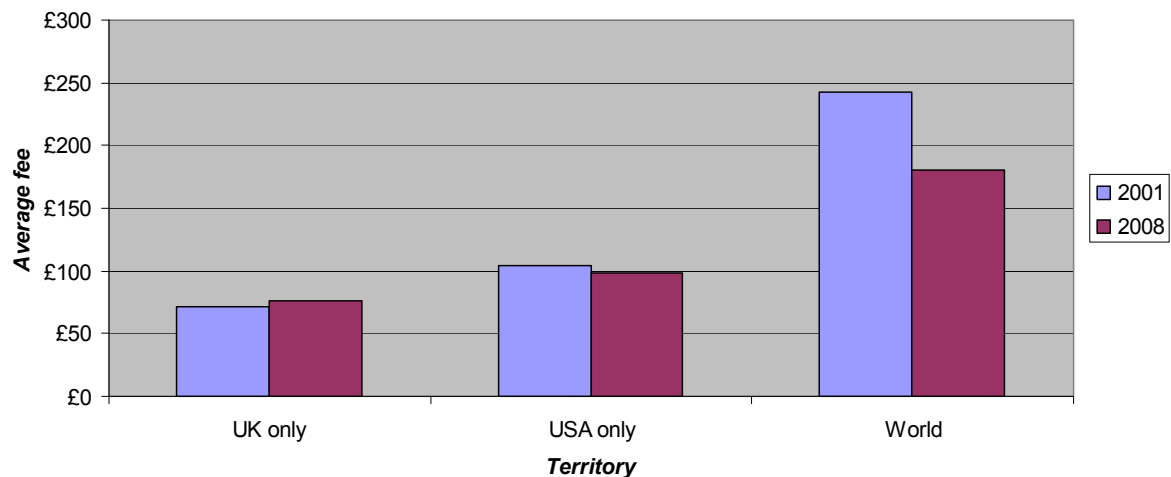
What is the average flash fee that you charge?

There were 39 responses to this question.

UK only	£76
USA only	£99
World	£180

The figures quoted represent the average values of the responses received.

Average TV flash fee comparison, 2001 to 2008



How have you noticed single flash fees changing over the last two years?

There were 38 responses to this question.

Increased: 8% (3)
Decreased: 16% (6)
Stayed the same: 76% (29)

- Of the respondents who have noticed an increase in flash fees and who provided a figure, increases quoted ranged from 10% to 25%.
- Of the respondents who have noticed a decrease in flash fees and who provided a figure, decreases quoted ranged from 10% to 25%.

Do you place a time limit on the length of time that constitutes a flash?

There were 39 responses to this question.

Yes: 36% (14)

No: 64% (25)

- The times mentioned for what constitutes a flash ranged from five seconds to 30 seconds, with the average being 12 seconds. A third of respondents said they defined a flash as being up to five seconds long.

If the image appears on screen for longer than your designated length of time, how do you determine the additional fee payable?

There were 10 responses to this question.

- Three respondents said they would negotiate the extra fee to be paid if an image appears on screen for longer than their designated length of time.
- Three said they apply a flat percentage extra (ranging from 5% to 100%).
- Three said the extra amount payable depends on the amount of time beyond their limit the image is on screen for.
- The final respondent said that in such an instance a full buyout fee would be charged.

Do you charge an additional fee if an image is used a second time within the same programme?

There were 28 responses to this question.

Yes: 74% (29)

No: 26% (10)

- The overwhelming consensus of opinion here (as suggested by 19 out of 23 respondents) is that 50% of the original fee would be charged if an image is used a second time within the same programme.

Do you charge more for the use of an image in a programme's title sequence?

There were 36 responses to this question.

Yes: 28% (10)

No: 72% (26)

- Just over half of the respondents who answered 'yes' to this question said that they charge a percentage amount extra on top of their normal flat fee rates, with 50% being the only actual figure quoted.
- Two Members said they negotiate in such instances.
- Other ways of charging more for the use of an image in a programme's title sequence included charging a flat fee equivalent, applying a five year buyout figure, and calculating a fee depending on the number of flashes and their duration.

If an image is used as set decoration⁸, do you charge the same rate as for flash fees?

There were 39 responses to this question.

Yes: 41% (16)

No: 59% (23)

- 38% of respondents who answered 'no' to this question said the amount they charge depends on a variety of factors including the size of the image used, it's prominence on screen, the length of time it appears for and the nature (or quality) of the programme it appears in.
- 20% said they have their own separate rate card for such usages.
- 20% said they discount their standard flash fee rates for such a usage, with a 25% discount being the favoured option.
- 10% negotiate the fee for such usages, but indicated that the negotiated fee is always less (sometimes much less) than their standard flash fee.
- 10% simply said they charge more than their standard flash fees.

For the first repeat of a programme in which an image is used, what percentage of the first-rate fee do you charge?

There were 33 responses to this question.

- Although such charges ranged from 25% to 75%, the majority of respondents (87%) said they charge 50% of the first-rate fee in such instances.

Do you have a standard licence agreement for the use of images in a TV programme over several years?

There were 39 responses to this question.

Yes, we have a standard agreement that we insist the client agrees to: 45% (17)

No, we usually use the client's licence form: 42% (16)

Other: 16% (6)

- Of the six respondents who answered 'other' to this question, responses given included negotiating for such usages, charging a buyout package fee, and having a standard agreement (that the client isn't then forced to agree to).

What licence periods do you offer, or agree to, for the unlimited broadcast of a TV programme which includes one of your images (please tick all that apply)?

There were 36 responses to this question.

- 36% of respondents said they offer a licence period of one year.
- 67% said they offer five year licences.
- 22% said they offer seven year licences.
- 72% said they offer 10 year licences.
- 19% said they are prepared to offer licences 'in perpetuity'.
- Other licence periods mentioned included terms of three and 25 years.

⁸ For example, on a poster which appears within a set in a drama.

What is your most commonly requested licence period?

There were 35 responses to this question.

- Just over a third of respondents said that their most commonly requested licence period is five years.
- Just under a third said ten years.
- Just over a quarter said that 'in perpetuity' licenses were their most requested.

What rights bundles do you most commonly license to television clients, and have you noticed any change in the last two years?

There were 28 responses to this question.

- Over a third of respondents said that rights to cover internet streaming, video on demand etc. (usually for a period of anything between seven and 30 days) were commonly requested packages.
- Almost a third of respondents mentioned that unlimited number of showings over a set time period (usually five or 10 years) is often requested.
- Almost a third simply mentioned standard TV rights when describing such packages.
- 18% said that their clients expect the rights package to cover all broadcasting media.
- 14% said world rights, all media.
- 11% said that TV clients are asking for all rights 'in perpetuity'.
- 11% mentioned cable/satellite TV generally.
- 11% said their clients want a potential theatrical release to be covered.
- 7% mentioned promotional uses.
- Other respondents said they charge a one-off fee in an attempt to keep things as simple as possible, and that generally clients are requesting more rights for less money.

“Many more requests for digital media, seven-day playback etc. Everyone seems to want to keep their options open re media which makes pricing a nightmare.”

Do you find that TV companies are requesting 'in perpetuity' rights as the standard usage more than they did two years ago?

There were 34 responses to this question.

Yes, they ask for these rights more often: 74% (25)

No, they ask for these right less often: 9% (3)

It's about the same: 18% (6)

What is your average rate for the following worldwide television licences, if you agree to them, including unlimited showings on standard and non-standard TV formats?

There were 30 responses to this question.

5 years	£377
10 years	£493
'In perpetuity'	£626

The figures quoted represent the average values of the responses received.

- Five Members took the opportunity to stress that they do not grant TV rights 'in perpetuity'.
- Three Members said they negotiate such deals, with 'in perpetuity' rights more likely to be negotiated than the other two.
- A couple of respondents stressed that the figures they quoted did not cover DVD, internet rights etc.

Do you include DVD rights within your standard licences?

There were 37 responses to this question.

Yes: 38% (14)

No: 62% (23)

- Of the 21 respondents who answered 'no' to this question and who provided further details, 38% said they would charge an extra fee based on the original licensing fee. This fee ranged from charging the same again, to charging one-and-a-half times the original fee, with most respondents simply charging the same again.
- A third of respondents said that the new fee would depend on the territorial rights required and/or the number of copies of the DVD printed.
- 10% said they charge a percentage of a normal re-use fee in such cases.
- 10% said that their standard 'all media' rates would apply.
- 10% said that in such instances they would charge a flat fee (with £150 being the only figure specifically mentioned).

Do you offer discounted rates for multiple picture usage within the same programme or series?

There were 36 responses to this question.

Yes, we offer a set structure of discounts: 33% (12)

Yes, but the discounts are negotiated and therefore can vary: 64% (23)

No, we do not offer discounted rates: 3% (1)

Do you apply the same rates to TV production companies outside of the UK, or do you have a different structure for other territories?

There were 37 responses to this question.

Yes, the same rates apply: 70% (26)

No, rates vary in different countries: 30% (11)

- Of the respondents who answered 'no' to this question and who provided further details, no clear trend emerged. Some negotiate when dealing with different territories, others simply stated that USA rates are less than UK rates whilst others said that they deal with such sales via their agents in those territories.

Do you supply images to the BBC?

There were 37 responses to this question.

Regularly: 60% (22)

Occasionally: 24% (9)

Hardly ever: 16% (6)

Are you part of the BBC's Telpic agreement?

There were 37 responses to this question.

Yes: 70% (26)

No: 30% (11)

Excluding the BBC, do you have any long term fee agreements with TV production companies (i.e. agreements that cover more than a single programme or series)?

There were 38 responses to this question.

Yes: 21% (8)

No: 79% (30)

Are there any areas that you find problematic when licensing images for television use?

There were 23 responses to this question.

- 17% of respondents said that dealing with the demands of their clients was problematic when licensing images for TV use. Particular areas mentioned included clients wanting all rights, clients wanting too many rights for the money they were prepared to offer, and a lack of knowledge from the client regarding TV licensing in general.
- 17% of respondents said their own lack of knowledge concerning new media is a problem.
- 13% specifically mentioned the BBC as a problem area, either as a consequence of them sending their own licences regardless, or trying to operate outside of the Telpic agreement even though they are signed up to it.
- 13% mentioned that dealing with 'in perpetuity' licences is a problem.
- 9% said monitoring actual usage is difficult.
- 9% mentioned dealing with the demands of small production companies and/or clients on very tight budgets.
- Other responses included understanding exactly what rights are being asked for, negotiating buyouts and falling prices in general.

“Understanding requests for 'all media, in perpetuity' and how to value this use.”

ELECTRONIC MEDIA (sample size = 69)

This section covers the use of images in the ever-developing sector of electronic media. The survey incorporates websites, screensavers, e-cards and email marketing.

Do you ever include electronic rights (with no additional charge) in the fees you charge for print use?

There were 69 responses to this question.

Yes: 45% (31)

No: 55% (38)

- Of the respondents who answered 'yes' to this question and who provided further details, 14% said they include such rights if they are discussed, but do not generally offer them as part of a deal.
- 14% said that such rights are granted when dealing with educational textbooks which have a CD-ROM as part of the package.
- Another 14% said they grant such rights when dealing with publishers in general (with one respondent mentioning the travel sector in particular)
- 9% pointed out that as they supplied Royalty Free images, such rights are automatically granted.
- Other instances where electronic rights would be granted at no extra cost included magazines wishing to have up to three month's web use, projects with low print runs, small start-up businesses, multiple use licences and some subscription deals.
- One respondent pointed out that some publishing clients insist that electronic rights are granted at no extra cost.

Are there any new electronic media that you have difficulty in pricing?

There were 64 responses to this question.

Yes: 61% (39)

No: 39% (25)

- Of the 33 respondents who provided further details, 21% said a blanket 'all', indicating that this field is still in its infancy as far as recognised pricing is concerned.
- 18% said digital streaming (including podcasts)
- 9% listed websites/microsites in general.
- 9% said online learning resources.
- 9% said mobile downloads.
- Other potential pricing difficulties mentioned included screensavers, e-newsletters, e-cards, banner ads and CD-ROMs.

"The BBC have a plethora of new electronic media rights."

"We constantly look around to see what others are doing."

Have you experienced an increase in sales for electronic media in the last two years?

There were 64 responses to this question.

Yes: 56% (36)

No: 6% (4)

About the same: 38% (24)

- Sales increases mentioned ranged from 8% to 90%, with the average increase being 36%.
- A handful of Members noted that even though they'd experienced an increase in electronic sales over the last two years, the fees for those sales were lower than in other markets.

Do you supply images for mobile phone use?

There were 64 responses to this question.

Yes: 16% (10)

No: 84% (54)

- Of those who answered 'yes' to this question, the only comments regarding actual usage referred to two mentions of wallpaper use and one reference to book content being made available this way.

If so, do you offer any royalty-based deals for mobile phone usage?

There were 8 responses to this question.

Yes: 25% (2)

No: 75% (6)

- Of those who answered 'yes' to this question, the only royalty-based deal mentioned was one of 10% on wallpaper downloads.

If so, what price do you charge for mobile phone wallpaper usage?

There were 2 responses to this question.

- The two prices quoted for the use of one image for one year were £1 and £245.

Do you supply images as computer screensavers for commercial and/or personal use?

There were 62 responses to this question.

Yes: 21% (13)

Yes (but for commercial only): 10% (6)

No: 69% (43)

Does the target market or language of the website affect the price you charge when licensing for web use?

There were 59 responses to this question.

Yes: 49% (29)

No: 51% (30)

- Of the respondents who answered 'yes' to this question, 39% said they would charge less for a website that had a not-for-profit, charitable or educational remit than they would for a commercial or editorial website.
- 21% said they were guided by the market/territory of the intended audience of the website.
- 11% said they would take into account the profile of the client before agreeing a price.
- No respondents gave any indications as to the sorts of fees they would charge.

Do you have a separate price for low-res, Rights Managed images for website use only?

There were 59 responses to this question.

Yes: 27% (16)

No: 73% (43)

What discounts do you offer on bulk deals for electronic projects such as CD-ROMs or websites?

There were 42 responses to this question.

No. of images	10	20	50	100
Average discount	10%	15%	23%	30%

The figures quoted represent the average values of the responses received.

- 10% of respondents said the discounts they offer vary from project to project.

Do you license images for longer than five years?

There were 58 responses to this question.

Yes: 40% (23)

No: 24% (14)

Never been asked: 36% (21)

- Of the 19 respondents who provided further details, 63% said they set a 10 year limit when licensing images for longer than five years.
- 16% said they allow such images to be used 'in perpetuity'.
- 11% simply stated that they charge more when licensing images for longer than five years.

Do you offer different rates for restricted access sites (e.g. intranet or password protected)?

There were 56 responses to this question.

Yes: 43% (24)

No: 57% (32)

- Of the 22 respondents who provided further details, 59% said they offer percentage discounts. Discounts quoted ranged from 10% to 50%, with the average being 33%.
- 14% said they negotiate such deals.
- 9% said that they take the number of end users into account before deciding on what sort of discount to offer.
- Of the Members who said that they do offer percentage discounts, three specifically mentioned educational websites as the type of sites that would qualify for such a discount.

Do you supply images for use on personal websites and/or blogs?

There were 56 responses to this question.

Yes: 32% (18)

No: 68% (38)

- Of the 15 respondents who said 'yes' and supplied further details, 40% said they charge a flat fee for such usages. Fees quoted ranged from £30 to £60, with the average being £44.
- 20% said they apply their standard commercial web rates in such instances (with unspecified discounts being available in some cases).
- 13% said they charge their usual academic/educational web-based rate for such usages.

If so, do you have a different pricing structure depending on whether the image is to be used on a personal or a commercial blog?

There were 56 responses to this question.

Yes: 40% (18)

No: 60% (27)

- Of the 13 respondents who answered 'yes' and who provided further details, five said they would simply charge a commercial blog a greater fee than they would for a personal blog.
- Three said that they treat commercial blogs in the same way that they treat commercial websites.
- Two said they negotiate a price no matter which type of blog the image was intended for.
- Two said they charge at a discounted rate for an academic or personal blog.

What fees do you charge for stand-alone online magazine sites for durations of one week and one month?

There were 28 responses to this question.

One week	£57
One month	£73

The figures quoted represent the average values of the responses received.

- For one week's use, the fees quoted ranged from £35 to £100, with a quarter of respondents charging £50.
- For one month's use, the fees quoted ranged from £45 to £150.

What discounts do you offer for bulk purchases of images for stand-alone online magazine sites?

There were 16 responses to this question.

- As far as bulk details are concerned, a quarter of respondents say they negotiate regarding such deals.
- A quarter say they offer discounts on bulk deals, but a number of factors would need to be considered before deciding on what form that discount would take (e.g. number of images, type of client etc.).
- Other respondents said that they offer percentage reductions on bulk orders of 10 or more images.

Do you offer images for e-card template usage?

There were 46 responses to this question.

Yes: 22% (10)

No: 78% (36)

Do you offer images for website template usage?

There were 39 responses to this question.

Yes: 13% (5)

No: 87% (34)

Do you offer royalty-based deals for e-cards?

There were 48 responses to this question.

Yes: 6% (3)

No: 94% (45)

- Royalty deals mentioned included 5%, 15% and 'it depends on the number of recipients'.

How do you charge for the use of an image in an email marketing campaign, and what factors affect the price?

There were 33 responses to this question.

- 61% of respondents said that the size of the mailout would be a factor in determining price.
- 39% said the length of the campaign.
- 27% said the type of client.
- 24% said the size the image would be used at.
- 15% said the intended use (e.g. commercial, editorial, academic etc.) would be a factor.

- 12% said they treat an email marketing campaign as though it were a traditional printed matter campaign.
- 12% said that the fee is influenced by the position in the email that the image would appear.
- Only three respondents mentioned prices that they charge. These prices ranged from '£65 for one campaign', to '£235 for three months for a commercial usage and £49 for editorial' and 'between £135 and £425, depending on region, duration and industry'.

DISPLAYS & EXHIBITIONS (sample size = 43)

This section covers the use of images for both commercial and non-commercial display. The former includes trade fairs and shop window displays, while the latter incorporates the various ways in which images are used in museums and similar exhibition use.

How much do you charge for the use of images in trade fair displays at A2 and A0 sizes for one week and one year?

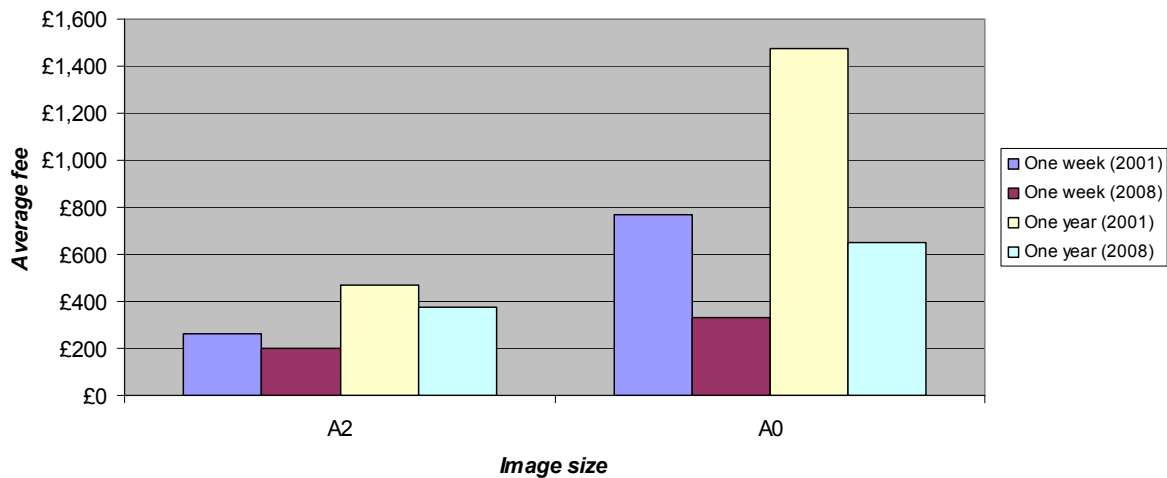
There were 39 responses to this question.

	A2	A0
One week	£202	£333
One year	£373	£651

The figures quoted represent the average values of the responses received.

- One respondent said they charge approximately twice as much if the image is to be used outside the UK. This respondent also makes a nominal charge for the supply of the digital image.
- Another respondent said their price is based on no model-release clause being required. If a model-release clause is required, they add a third to the price.
- One respondent said they negotiate such prices.

Average display fee comparison (commercial use), 2001 to 2008



Do you have a different fee structure for office or restaurant displays?

There were 39 responses to this question.

Yes: 46% (18)
No: 54% (21)

- Of the respondents who answered 'yes' to this question, a third simply said that their fees were lower for such usages (with discounts quoted ranging from 20% to 35%).

- Five respondents said their fees would depend on factors such as the location and prominence of the display, its size, its likely audience and whether the display took the form of a graphic display or an exhibition of prints.
- A quarter of respondents quoted prices for such usages. A2 prices ranged from £276 for one month's usage to £540 for one year's usage, and A0 prices ranged from £434 for one month's usage to £806 for one year's usage. One respondent simply stated £100+ for office use and £200+ for restaurant use (without stipulating either size or duration).
- One respondent said they apply their basic display rates, but simply extend the time limit.
- One respondent said they had a set fee for office use whilst another said they negotiate in such instances.

Do you have a different fee structure for shop window displays?

There were 39 responses to this question.

Yes: 28% (11)

No: 72% (28)

- Of the respondents who answered 'yes' to this question, three quoted prices which ranged from £150 (for one week's use) to £300 (with no time limit being specified). Two respondents said they add approximately 10% to their standard rates when pricing for shop window displays and one respondent said they charge at the same rate.
- Three respondents said their prices depend on factors such as the size of the image, the prominence of the display, the likely audience size and the duration of the display.
- One respondent said they apply their basic display rates, but simply extend the time limit.
- One respondent said they apply their point of sale rates when pricing shop window displays.

How much do you charge for the use of an image in a museum exhibition at A2 and A0 sizes for one week and one year?

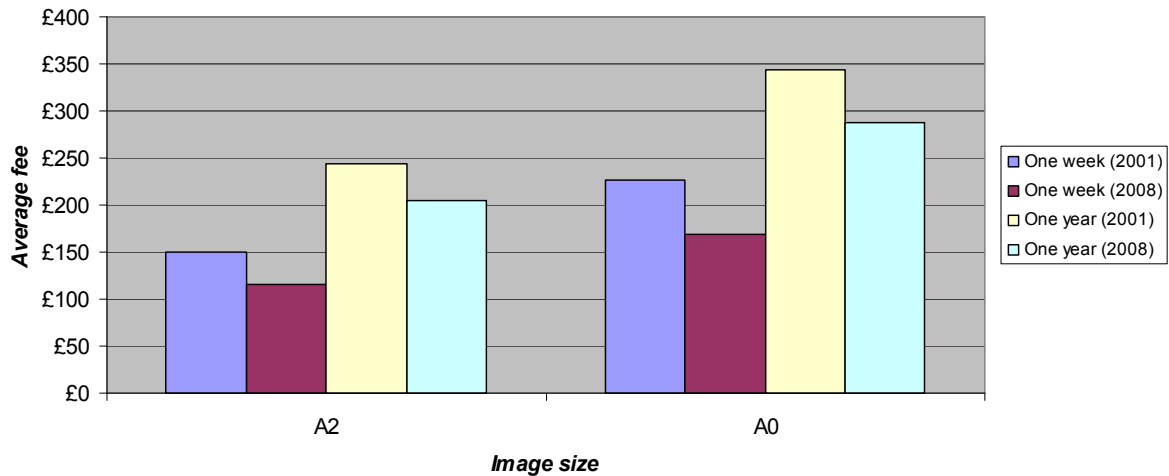
There were 38 responses to this question.

	A2	A0
One week	£115	£168
One year	£205	£288

The figures quoted represent the average values of the responses received.

- One respondent indicated that they only charge a £20 digital fee to museums, whilst a couple said they waive such fees entirely. A third said they apply a flat £50 fee for non-commercial temporary exhibitions.

Average display fee comparison (museum exhibition), 2001 to 2008



- Note: the 2001 survey did not separate out museum displays as such (it referred to 'non-commercial' exhibitions) but has still been used as the relevant fee structure for comparison purposes.

How much extra would you charge to extend the display or exhibition licence period from one year to three years?

There were 30 responses to this question.

- Values given ranged from no extra charge to 100%, with the average being 38%. Almost a third of respondents said that they add 50% to their one-year rates when calculating their three-year rates.
- One respondent said they waive such fees.

How much extra would you charge to extend the display or exhibition licence period from one year to permanent use?

There were 29 responses to this question.

- Values given ranged from no extra charge to 120%, with the average being 69%. The most common approach is to double the one-year fee (a method employed by almost a quarter of those who are prepared to offer such licences).
- 27% of respondents said they would not be prepared to offer a licence for unlimited use, with two saying that 10 years is the maximum length of time they are prepared to offer such licences for.
- One respondent said that they are prepared to grant such licences, stipulating instead that the agreed usage is for the lifetime of the project and not 'unlimited'.
- One respondent said they waive such fees.

How do your prices vary for exhibition use if the exhibition is to be displayed at two or more venues simultaneously?

There were 25 responses to this question.

- 72% of respondents said they would operate some kind of a re-use fee in such cases. Fees quoted ranged from an extra 25% to 100%, with the average being 56%. The most common method is to apply a re-use fee of 50% for each subsequent exhibition (an approach favoured by 39% of such respondents).
- 12% said that they would negotiate such fees.
- Other respondents said they would apply a £50 flat-rate museum fee, or apply an unspecified multi-use discount.
- One respondent said they waive such fees.

How does your price for exhibition use vary if the exhibition is a travelling one, and does this differ if the exhibition travels internationally?

There were 30 responses to this question.

- 57% of respondents said they would not treat a travelling exhibition any differently to a static one (with a number of respondents pointing out that their licences are granted according to duration and not territory).
- Almost a quarter said they would impose an extra territorial charge for an international exhibition. Extra charges quoted ranged from 25% to 80%, with the average being 61%. However, one respondent said that this extra charge would only apply if the exhibition moved from country to country – if it remained static within one particular country then this charge would not apply.
- Other respondents said that any extra charges they'd need to make would be negotiated, that the charge would vary (according to the size and/or type of the venue concerned, the exposure of the image etc.), that each individual exhibition would be treated as one venue (irrespective of where it its located), and that fees are waived for all museum usages.

How do you charge for the use of images in computer or touch-screen displays at a museum or educational institution, and what factors affect your pricing for this medium?

There were 29 responses to this question.

- Just over a third of respondents said they apply a flat fee for such usages. Fees quoted ranged from £40 to £90, with the average being £61.
- Of the remaining respondents, most said that the fee would depend on a wide variety of factors, with the most common being the length of the exhibition (just over a quarter specifically named this as a determining factor).
- 14% said the profile of the exhibiting body would be taken into account when pricing such a usage.
- 14% said the length of time the image is to appear for on screen.
- 14% of respondents said they would price the usage in the same way as they would a standard printed display.
- 10% mentioned the size the image is to appear at on the screen.
- 7% mentioned the client's budget.
- 7% said they'd take the number of images used into account.
- 7% said they would price differently depending on whether or not the exhibition was of a commercial or non-commercial nature.

- Other factors that would be taken into account include the length of the loop, the number of display units involved (and whether or not any are hand-held) and the anticipated number of visitors to the exhibition.

What fee would you charge for a computer screen display for one image for a period of one year, with intermittent use?

There were 28 responses to this question.

- Fees quoted for such a usage ranged from £50 to £260, with the average being £109.
- A couple of respondents indicated that factors such as the number of visitors and the nature of the exhibition concerned (e.g. whether it was commercial or non-commercial) would have a bearing on the pricing.
- One respondent indicated that they only charge a £20 digital fee to museums, whilst another said they waive their fees entirely. A third said they apply a flat £50 fee for non-commercial temporary exhibitions.

What kind of discount do you offer for the use of 10 images in a single exhibition?

There were 35 responses to this question.

- Discounts quoted ranged from no discount to 25%, with the average being 15%. The most common discount quoted was 10%, with 43% of respondents mentioning it.
- 11% of respondents said they negotiate their discounts.
- Other responses included the fact that the nature of the client is a factor in determining any discount offered, that discounts only apply on more than 10 images and that fees are waived for such usages.

What kind of discount do you offer for the use of 50 images in a single exhibition?

There were 34 responses to this question.

- Discounts quoted ranged from 15% to 50%, with the average being 31%. The most common discount quoted was 25%, with just under a quarter of respondents mentioning it.
- 21% of respondents said they negotiate their discounts.
- Other responses included the fact that the nature of the client is a factor in determining any discount offered, and that fees are waived for such usages.

Do you offer special rates if the image to be used will appear either at small size or as part of a montage design?

There were 37 responses to this question.

Yes: 78% (29)

No: 22% (8)

- Of the respondents who answered 'yes' to this question and who supplied further details, 21% said they discount their normal rates for such usages. Discounts quoted ranged from 'small' to 40%, with an average of 16%.
- 21% said they price such usages on a case-by-case basis.
- 17% said they price such usages according to the size the image is to be used at (with two respondents commenting that they arrive at a fee by comparing the size of the image to the size of the display as a whole).

- 17% said they operate a sliding scale upwards, with A5 (or in one instance A6) being the smallest size they have a rate for.
- 12% said they negotiate such discounts.
- 8% said they take the exhibition (or display) into account when pricing such usages.
- 8% said they take the number of images to be used into account.
- 8% simply said they charge a minimum fee in such instances, with £50 being the only figure quoted.

Do you offer discounts or separate pricing structures for non-commercial contexts of use, regional use or not-for-profit organisations?

There were 38 responses to this question.

Yes: 79% (30)

No: 21% (8)

- Of the respondents who answered 'yes' to this question and who supplied further details, three-quarters said they offer discounts to these types of organisation. Discounts quoted ranged from 10% to 50%, with the average being 33%. The most common discount figure quoted was 50%, with a fifth of respondents saying it is the discount they apply.
- Of the respondents who said they do offer discounts but did not supply a figure, half said these discounts were negotiated, whilst the other half simply said they charge a lower fee (one respondent pointed out that although this fee was lower, it was never free).
- Two respondents said they charged a flat £50 fee, whilst a third said they'd be prepared to waive the fee entirely.
- Two respondents said they have a separate rate card for such instances.
- Two respondents said any possible discounts would depend on factors such as the size and purpose of the organisation involved, whether the intended use was charitable or not, and how much the client can afford to pay.

How much do you charge for the use of a single image for the following audiovisual displays or powerpoint presentations?

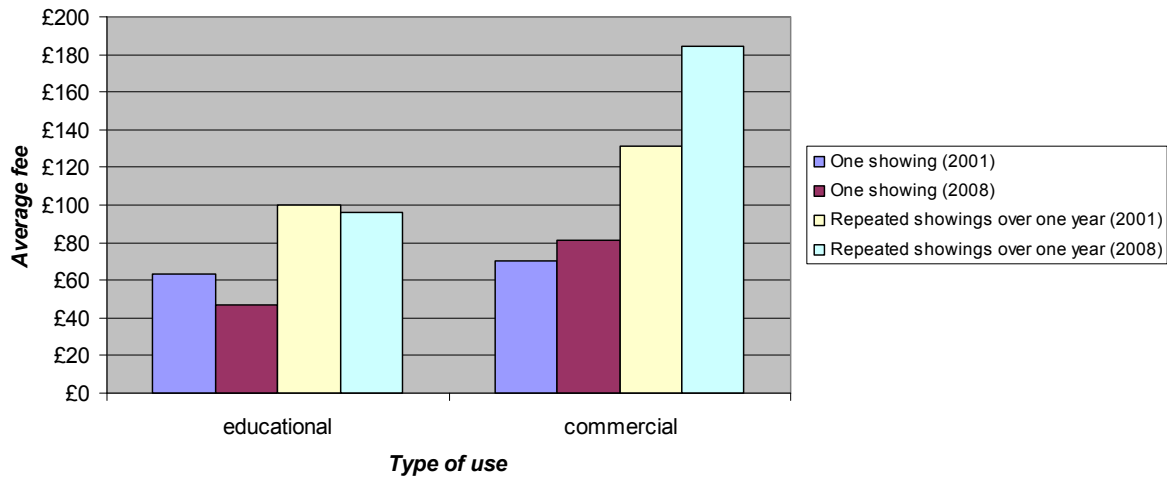
There were 33 responses to this question.

	Educational	Commercial
One showing	£47	£81
Repeated showings over one year	£96	£184

The figures quoted represent the average values of the responses received.

- With regard to educational use, four respondents said they either waived the fees entirely or charged a nominal fee for the supply of images (with £20 per image being the only figure quoted). For repeat use, one respondent said they charge a fee of £25 per presentation.
- With regard to commercial use, one respondent said they would negotiate a fee, one said they'd charge a nominal supply fee of £20 per image and one said they supply images free for the purpose of powerpoint presentations. For repeat use, one respondent said they charge a fee of £100 per presentation.

Average audiovisual fee comparison, 2001 to 2008



What kind of discount would you offer for the use of 10 images in an audiovisual presentation?

There were 30 responses to this question.

- Discounts quoted ranged from 10% to 25%, with 12% being the average. By far and away the most common discount figure was 10%, with almost three-quarters of respondents quoting it as the discount they apply.
- One respondent said that even though they do offer a discount, it is up to the client to request it – it is not offered up front.
- One respondent commented that their 10% discount is negotiable.
- One respondent said they apply an unspecified flat fee, which is negotiable.

Do you offer a print-making service to members of the public?

There were 41 responses to this question.

Yes: 73% (30)

No: 27% (11)

If so, how much do you charge for A4 and A2 prints (excluding postage)?

There were 41 responses to this question.

A4	£24
A2	£56

The figures quoted represent the average values of the responses received.

- A4 print fees quoted ranged from £10 to £40 (in 2001 they ranged from £9 to £65).
- A2 print fees quoted ranged from £25 to £110 (no A2 print figures were asked for in the 2001 survey).
- One respondent pointed out that the price they charge varies depending on the type of print requested, the finish required (e.g. matt, gloss, canvas etc.).

- Another respondent said that they have outsourced this service in exchange for a share of the revenue.

How have your pricing structures for exhibition or display use have changed in the last two years.

There were 30 responses to this question.

- Almost three-quarters of the respondents to this question indicated that their pricing structures have remained largely unaltered over the last two years (although one mentioned a gradual shift towards more negotiated prices). In addition to this, one respondent said prices have risen slightly, whereas two said they have fallen by approximately 10%.
- 10% of respondents said that they have seen a definite change in their fee structures, with particular reference being made to the duration of the licences requested; and that clients are increasingly asking for either longer licences, or 'lifetime of exhibition' licences as opposed to set periods.
- 7% said that their categories of usage have broadened.
- 7% said that there has been an increase in the demand from clients for greater discounts when ordering large numbers of images.

“We have had to offer much larger discounts for volume use, and more simplified and less granular fee structures.”

Are there any areas of exhibition or display use that you have had difficulty in pricing?

There were 33 responses to this question.

Yes: 30% (10)

No: 70% (23)

- Three respondents who answered 'yes' to this question named a blanket 'all areas', citing factors such as having to know the likely audience, the value of the image to the client and the profile of the client as reasons for making exhibition and display pricing difficult.
- Two respondents named interactive and/or computer displays as problematic areas when it comes to pricing, as it can be difficult to ascertain just how long an image is on screen for.
- Other problem areas mentioned included very large prints, images reproduced on the sides of buildings, commercial trade shows and white board usage.

MERCHANDISING (sample size = 36)

This section includes questions about the use of images on a variety of products. The main focus is on paper products such as calendars, retail posters and greetings cards, but there is also information on other merchandise like t-shirts, mouse mats and ceramics.

Have you noticed any significant changes in your pricing structures for retail cards, calendars and posters in the last two years?

There were 36 responses to this question.

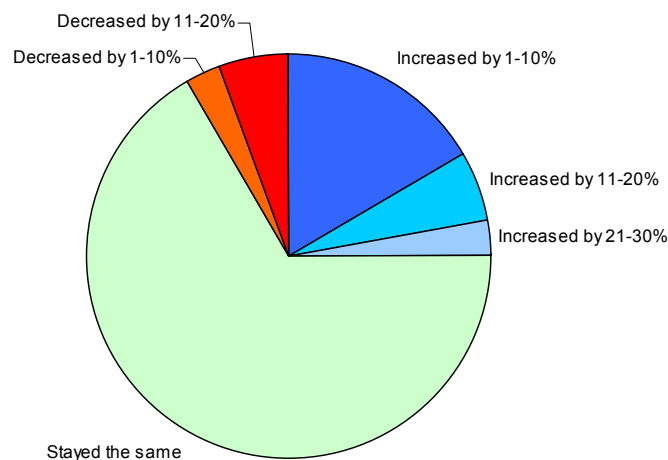
Yes: 8% (3)

No: 92% (33)

- Of the two respondents who answered 'yes' and who went into further detail, one said that merchandising is not a cost-effective area for them and so they have had to raise their prices to make such business worthwhile, whereas the other respondent said they have had to lower their prices to remain competitive.

How have your average prices for cards, calendars and posters changed since 2005?

There were 36 responses to this question.



How much do you charge for a single inside use of an image in a retail calendar for print runs of 5,000 and 20,000?

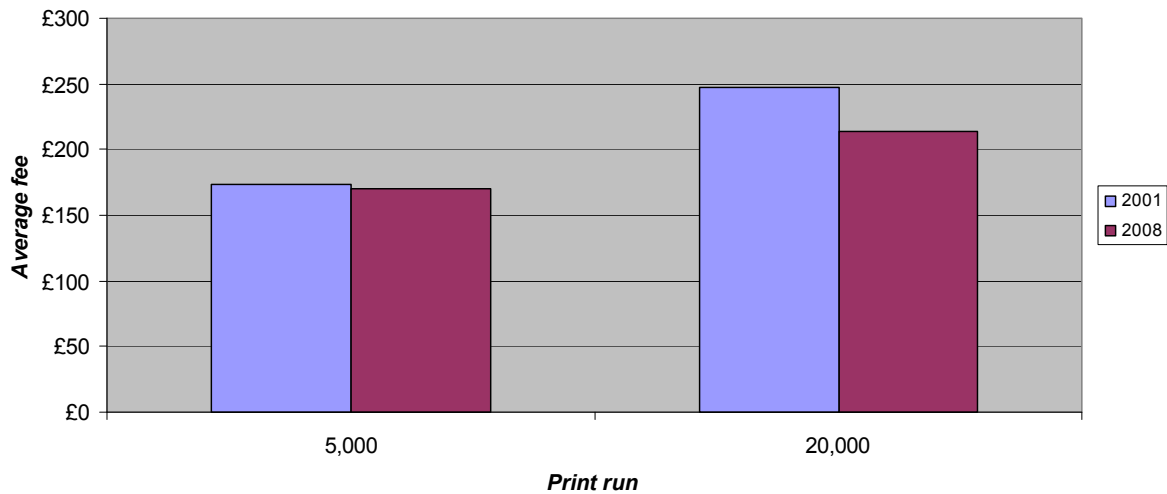
There were 24 responses to this question.

5,000 print run	£170
20,000 print run	£214

The figures quoted represent the average values of the responses received.

- Almost 20% of respondents indicated that their fee for a 5,000 print run would be the same as that for a 20,000 print run.
- One respondent said they negotiate their prices for print runs of 20,000.

Average retail calendar fee comparison, 2001 to 2008



How do your prices differ between a retail calendar, a stock advertising calendar and a bespoke/corporate calendar⁹?

There were 20 responses to this question.

- 40% of respondents said they did not differentiate when it came to calendar pricing, consequently all calendars are charged at the same rate.
- 35% said they charge more for the use of an image in a corporate calendar (with one respondent saying this is because such calendars are classified as 'promotional'). This extra charge ranged from 15% to 25%, with 25% being the option favoured by almost all respondents. Interestingly, a couple of respondents actually said they'd charge 25% less to a corporate calendar client.
- Two respondents said they would charge less if the calendar is being printed for a charitable organisation.
- One respondent pointed out that they have a price structure for their niche market, but they would try to double the rate for a usage in a different market.
- Only one respondent made a direct reference to stock advertising calendars, with the inference being that they are treated in the same way as retail calendars.

How do you charge for a single image calendar cover where the image is not used again inside?

There were 24 responses to this question.

- 46% of respondents said they applied a flat fee for cover-only usage. Figures quoted ranged from £150 to £400, with the average being £277.
- A quarter said that they add a percentage on to their basic inside rate when calculating such fees. These percentages ranged from 40% to 100%, with the average being 60%.
- 17% specifically mentioned that they take the print run into account.
- 8% said they charge the same as their inside rate.

⁹ Retail calendars are those which are produced ultimately for sale directly to the consumer; stock advertising calendars are those which are produced by specialists who offer a range of products to companies (which will often carry the company's logo) and are then distributed free of charge to a company's clients as a promotional exercise; and corporate calendars are those which are produced for individual companies and given away free to clients or staff as a promotional exercise (and may be produced directly by the company itself or by a design group commissioned by it).

- 8% said they simply add a flat fee to their inside rate (figures quoted were £75 and £100).
- 8% said they take the size of the image into account when pricing.
- 8% said that they negotiate such fees (or that the prices they quote are negotiable).

How do you charge for a single image calendar cover if the image is re-used from the inside?

There were 24 responses to this question.

- A quarter of respondents said they add a percentage to their inside rate when calculating such a front cover usage fee. Percentages quoted ranged from 40% to 50% with the average being 48% (a figure of 50% was quoted by half the respondents). One respondent indicated that a front cover would be charged at their standard inside rate if 12 or more images were used inside.
- 21% said that they apply a flat fee to cover such a usage. Fees quoted ranged from £138 to £150, with £146 being the average.
- 21% said they would charge more for the front cover use, but then discount the inside fee by 50% (as it would then qualify as a re-use). Methods of calculating the front cover fee varied from charging a flat fee (of £250-£400) to multiplying the inside rate (by two or two-and-a-half times).
- 13% said they would charge such a front cover usage at the same rate as their standard inside rate.
- Other methods of calculating a fee for such a usage included applying a flat £50 fee on top of the inside rate, making the front cover the first use, and negotiating.

How do you charge for a calendar inset image on an inside page (less than 1/8 page in size) compared to a single image at full-page size?

There were 20 responses to this question.

- Half the respondents to this question arrive at a fee by applying a percentage to their full-page rates. Percentages quoted ranged from 30% to 60%, with the average being 48%. The most common figure was 50%, with over half the respondents giving it as the figure they use.
- Just over a third of respondents said they apply a flat fee to cover such usages. Fees ranged from £35 to £125, with £77 being the average.
- 10% said they do not charge such usages any differently, as their fees are fixed regardless of image size.
- 10% indicated that they negotiate such fees (or that the fees they quote are negotiable).

How much do you charge for the use of one image on a greetings card for UK, non-exclusive print runs of 5,000 and 50,000, and for durations of one year and three years?

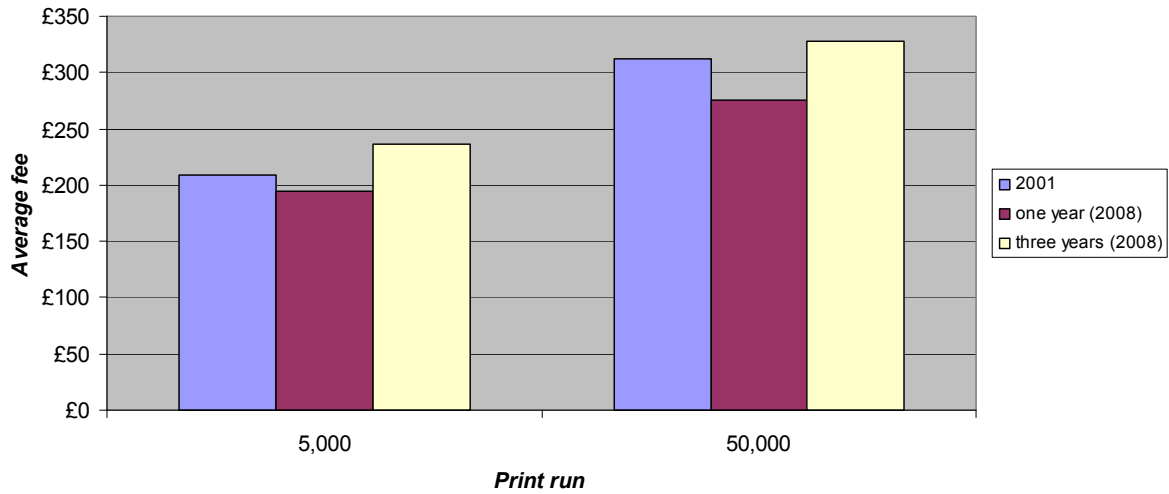
There were 22 responses to this question.

	One year	Three years
5,000 print run	£194	£237
50,000 print run	£275	£328

The figures quoted represent the average values of the responses received.

- For all prices except a one year duration with a 5,000 print run, two respondents said their fees were either negotiated or royalty based.

Average greetings card fee comparison, 2001 to 2008



- Note: the 2001 survey did not stipulate a time period when asking for greetings card fees.

How much do you charge for the use of an image on A2 and A0 retail posters for UK, non-exclusive print runs of 5,000?

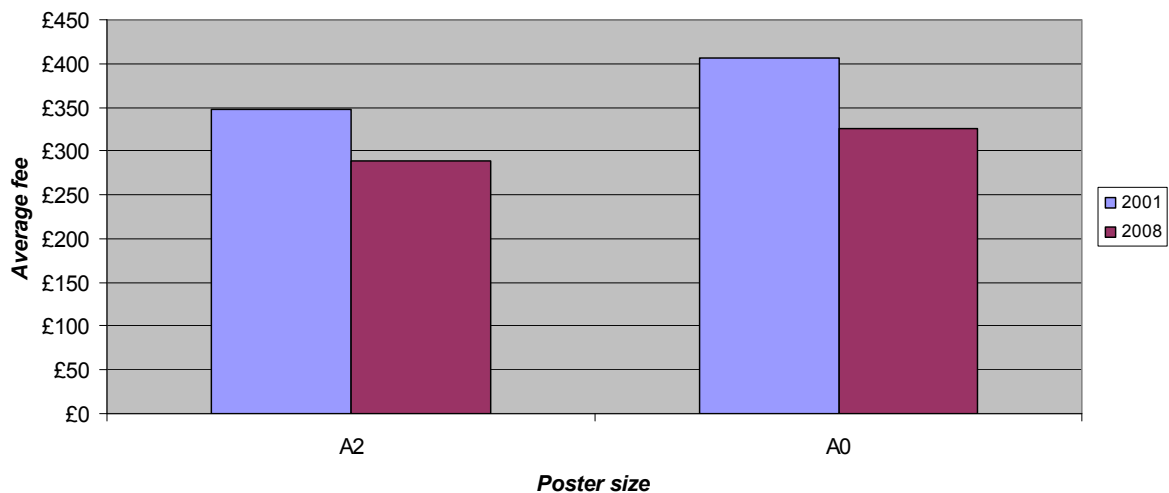
There were 25 responses to this question.

A2	£288
A0	£326

The figures quoted represent the average values of the responses received.

- One respondent said they negotiated such poster fees.

Average retail poster fee comparison, 2001 to 2008



Do you always limit retail poster rights to a specific time period?

There were 25 responses to this question.

Yes: 56% (14)

No: 44% (11)

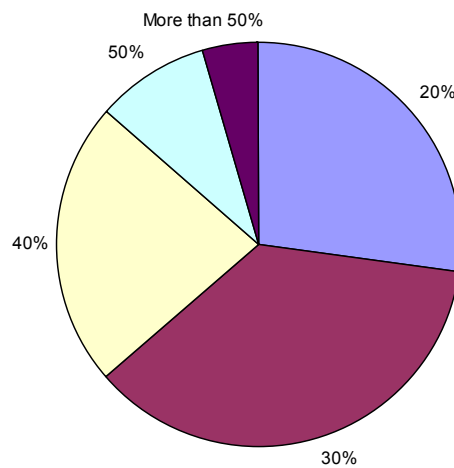
What kind of discount for quantity would you offer for card or calendar use if 10 images were billed together?

There were 27 responses to this question.



What kind of discount would you offer for card or calendar use for a total of 50 images used in one year?

There were 27 responses to this question.



Do you ever enter into royalty deals for printed paper products such as cards and calendars?

There were 25 responses to this question.

Yes: 32% (8)

No: 68% (17)

“Not worthwhile given the administration and low fees involved.”

- Of the respondents who answered 'yes' to this question, six indicated a royalty percentage that they apply. These percentages ranged from 5% to 12%, with an average of 8%.
- Two respondents request an advance fee, with one saying they ask for 10% royalties in addition to this fee, whereas the other said such an advance would be set against a 12% royalty deal.
- Two respondents indicated that at least some degree of negotiation would be involved when agreeing royalty deals.
- Another respondent said they request a royalty fee of 1p per item sold over and above a print run of 300,000.

What percentage extra do you charge for extending rights for a card or calendar from UK rights to European rights?

There were 21 responses to this question.

- 65% of respondents said that they charge 25% extra when extending rights for a card or calendar from UK rights to European rights.
- 5% said they charge 50% more.
- 30% indicated that they have some other form of pricing structure in place when dealing with such rights extensions (e.g. a flat fee, or a different pricing structure to the one indicated in the question).

What percentage extra do you charge for extending rights for a card or calendar from UK rights to world rights?

There were 21 responses to this question.

- 62% of respondents said that they charge 50% extra when extending rights for a card or calendar from UK rights to world rights.
- 14% said they charge 25% extra.
- 24% indicated that they have some other form of pricing structure in place when dealing with such rights extensions (e.g. a flat fee, or a different pricing structure to the one indicated in the question).

Do you offer exclusivity (in this medium only) for cards and calendars?

There were 25 responses to this question.

Yes: 28% (7)

No: 36% (9)

Sometimes: 36% (9)

- Of the respondents who answered 'yes' or 'sometimes' to this question, half indicated that the fee would remain the same (not least because most clients expect exclusivity as part of the main fee anyway and are thus unwilling to pay any more).
- Five respondents indicated that they add a percentage of the standard fee to the deal in such instances, with 50% being the figure most often quoted.
- One respondent said they either double the fee (or add a flat £150 to it), whilst another said they negotiate such fees.

Do you insist on a print-run limit for card and calendar use?

There were 25 responses to this question.

Sometimes: 48% (12)
Always: 24% (6)
Rarely: 8% (2)
Never: 20% (5)

Do you take format and/or retail price into account when pricing for cards, calendars and posters?

There were 26 responses to this question.

Yes: 50% (13)
No: 50% (13)

What other factors affect your pricing strategies for cards, calendars and other retail merchandise?

There were 14 responses to this question.

- 28% of respondents to this question said that the type of client has a bearing on their pricing strategy (with particular reference being made to the fact that a charitable organisation would qualify for a discount).
- 21% said the type of store the item is to be sold in would be a factor.
- 14% said a very low print run would affect the fee.
- 14% said the type of image (e.g. a famous image would command a higher fee).
- 14% said the volume of images ordered.
- Other factors mentioned included the territory that the item is to be sold in, whether or not the item would have a limited distribution, the budget of the client concerned, whether or not a long-standing fee agreement was in place, and whether or not the image would be re-used in another item of merchandising.

How do you work out prices for miscellaneous retail merchandising products such as jigsaws, mouse mats, ceramics or t-shirts?

There were 20 responses to this question.

- The most common response to this question was that any fees charged would be dependent (in part, at least) on the number of items featuring the image that were going to be produced, with 40% of respondents naming this as a factor.
- 30% either said such fees would be negotiated or that an element of negotiation would be involved.

- 20% said they have their own separate rate cards for such usages.
- 15% said the fee depends largely on either the client's budget or, in the case of the larger companies, what they're prepared to pay.
- 15% said the size of the image is a factor.
- 10% said the licence period.
- 10% said they either use their standard merchandise rate card prices or use these prices as a starting point and then go from there.
- 10% said the retail price of the item is a factor in determining a fee.
- One respondent said they charge a percentage of the retail price if the print run is over a certain amount.
- Other factors which affect the fee to be charged include the marketability of the image (or images) involved, the distribution the final product is going to receive and the prominence of the image on the product.

What range of prices would you expect typically to achieve for such miscellaneous retail merchandising products?

There were 19 responses to this question.

- The lower value of the ranges specified ran from £100 to £300, with the average being £144. The most common figure was £100, which was quoted by 38% of respondents.
- The upper end of the ranges specified ran from £380 to £1,000, with the average being £535. The most common figure was £500, which was given by 36% of respondents
- It could therefore be argued that the most popular price range for miscellaneous retail merchandising products is £100 to £500.
- Jigsaws came in for special attention here, with three respondents saying they had a set fee for jigsaw use (with two more specifying a range dependent on print run). Of the standard fees quoted, £400 was the most common fee suggested for the use of an image on a jigsaw.

Do you price different types of image differently when licensing for merchandising use?

There were 23 responses to this question.

Yes: 17% (4)

No: 83% (19)

- Of the respondents who answered 'yes' to this question and who provided further details, two said that the more marketable or famous an image is, the higher the fee it would command.

Are there any merchandising media (especially new media) that you find difficult to price?

There were 18 responses to this question.

Yes: 39% (7)

No: 61% (11)

- Two respondents to this question said that it is always difficult deciding how much to charge for the use of an image on different or new media, with one pointing out that it invariably comes down to how much the client is prepared to pay.

“Unusual uses are difficult to price in media beyond printed paper products and have to be dealt with on a case-by-case basis.”

- Two respondents mentioned downloads for mobile phones.
- One respondent said that pricing for retail and merchandising is difficult because it forms such a small part of their business.
- One respondent said that they found the use of images on anything beyond printed paper difficult to price.

ADVERTISING & PROMOTION (sample size = 44)

This section covers the use of images in both above and below the line advertising and promotion. It includes press, television, poster and online advertisements, together with point of sale promotions, product packaging, brochures and direct mail items. Information about travel brochure use may also be found here.

Have the fees you achieve for press advertising changed over the last two years?

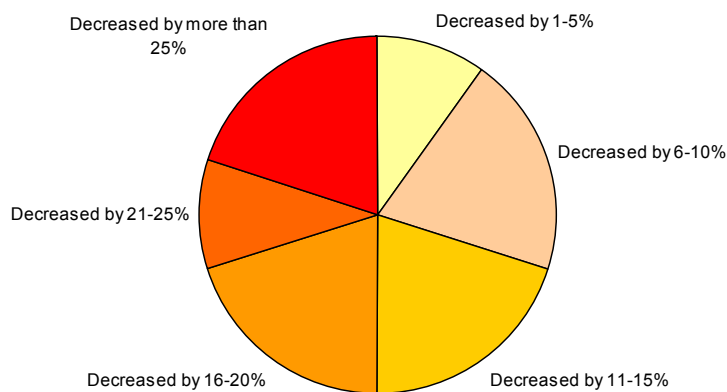
There were 40 responses to this question.

Yes: 32% (13)

No: 68% (27)

If yes, by what percentage have your prices for press advertising changed?

There were 10 responses to this question.



What factors do you use when calculating your prices for press advertising?

There were 36 responses to this question.

- 70% of respondents to this question said that the size the image is to be used at in the advertisement is a factor in determining the price.
- 55% said the number of insertions is a factor.
- 55% said the print run/circulation is important.
- 42% mentioned the territory/coverage of the publication.
- 39% said the length of time that the advertisement is due to run for.
- 30% mentioned the type of publication the advertisement is to appear in as a determining factor (e.g. trade, local, national etc.).
- 12% said the type of image used (e.g. studio image, snapshot etc.).
- 9% said the type of client was important.
- 9% mentioned the placement of the advertisement (e.g. cover, inside etc.).

- Other factors mentioned to a lesser degree included the number of images required, whether the image was part of a larger campaign or not (and if so, the type of that campaign), whether or not exclusivity was required, the budget of the client in question and the prices charged for similar usages by competitors.

How do you calculate the size for press advertising?

There were 40 responses to this question.

By the page size of the advertisement: 37% (15)

By the size of the image used in relation to the advert: 63% (25)

What is your average fee for a ¼ page, ½ page and full page national UK press advertisement for one month?

There were 26 responses to this question.

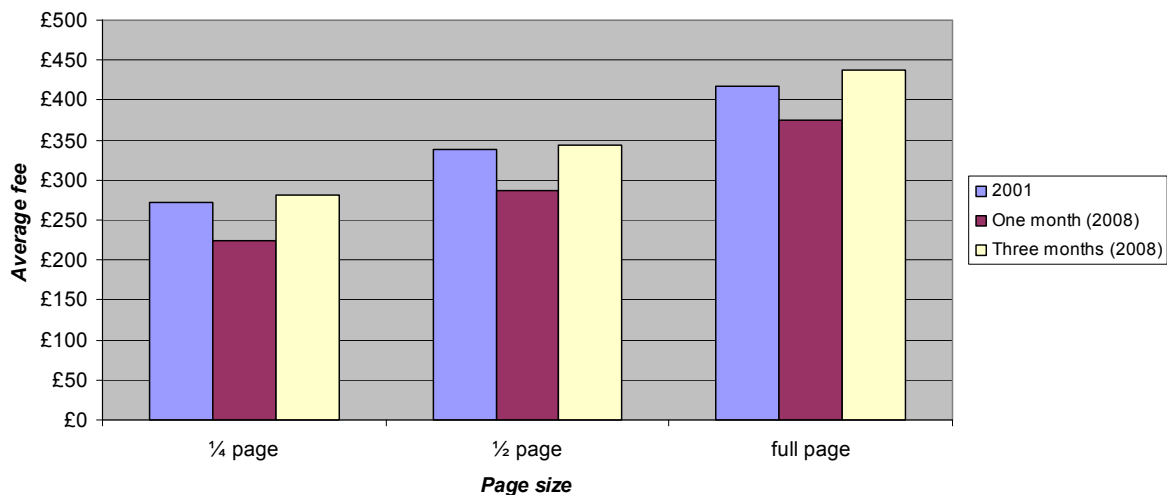
	¼ page	½ page	Full page
One month	£224	£287	£375
Three months	£282	£343	£438

The figures quoted represent the average values of the responses received.

Note: as the survey question did not stipulate a number of insertions, all figures clearly referring to more than one insertion were removed prior to calculating these averages.

- Two respondents pointed out that their prices were the same irrespective of whether the images were licensed for one month or three months.
- One respondent said that they negotiated all their ¼ page, ½ page and full page prices, and another said they negotiate their ½ page and full page prices.
- One respondent said they couldn't provide any figures because they charge by the number of insertions and not by the duration.

Average press advertisement fee comparison, 2001 to 2008



- Note: the 2001 survey asked for two separate sets of figures: 'by insertion' and 'by duration', so for the purposes of this comparison, the figures from the 'by insertion' section have been used.

Do you offer discounts for trade or provincial press advertising?

There were 41 responses to this question.

Yes: 78% (32)

No: 22% (9)

- Of the respondents who answered 'yes' to this question and who provided further details, 61% specified the discount rate that they apply. These ranged from 15% to 35%, with an average of 25%.
- 22% said any discount would be dependent upon the size of the publication's circulation.
- Other respondents said that the discounts they offer are affected by factors such as the status of the publication and the relationship they have with the client concerned. Another respondent said they only offer discounts on bulk deals whilst one said they usually don't apply any charge at all to their local press.

How do you calculate fees for multiple insertions of the same press advertisement in the same publication over a number of issues?

There were 27 responses to this question.

- A third of respondents said they offer a sliding scale of fees when charging for multiple insertions over a number of issues. On average, the second insertion is discounted at a third off the price of the first insertion, with subsequent discounts varying from then on. One respondent mentioned that they keep on discounting until a minimum fee is reached.
- 22% simply said they offer discounts in such instances without specifying what these discounts are.
- 19% simply said that they charge per insertion.
- 15% said that they take the print run into account when pricing for such usages.
- 7% said they negotiate these fees.

How do you calculate fees for multiple insertions of the same press advertisement in a number of different publications?

There were 28 responses to this question.

- 29% of respondents said that they charge per insertion when dealing with multiple insertions of the same press advertisement in a number of different publications.
- 18% simply said they offered a discounted rate in such instances.
- 14% said they negotiated, with the comment being made that these fees would be higher than those charged for multiple insertions in one publication.
- 11% said they offer a sliding scale of charges.
- 11% said the fee was dependent upon the print run.

When pricing for a press advertisement running over a set period of time, do you calculate for unlimited inserts, for a set number of inserts, or both?

There were 34 responses to this question.

Unlimited number of inserts: 38% (13)

Set number of inserts: 9% (3)

Both: 53% (18)

What is your average fee for advertising for one month on an Internet site's homepage?

There were 26 responses to this question.

Icon	£121
Medium-size banner	£163
Large banner	£203

The figures quoted represent the average values of the responses received.

What percentage would you add to your one-site fee for five sites, 20 sites and unlimited sites?

There were 23 responses to this question.

- For five sites, percentages quoted ranged from 5% to 250%, with the average being 53%.
- For 20 sites, percentages quoted ranged from 10% to 500%, with the average being 117%.
- For unlimited sites, percentages quoted ranged from 35% to 500%, with the average being 161%.
- One respondent said that they negotiate their fees for all three types of usages, and one said they negotiate their five-site usage fees.

What percentage would you add to your one-month fee to cover three months, six months and 12 months?

There were 26 responses to this question.

- For three months, percentages quoted ranged from 0% to 100%, with the average being 36%. The most common figure quoted was 50%, which was given by almost a third of respondents.
- For six months, percentages quoted ranged from 0% to 150%, with the average being 62%.
- For 12 months, percentages quoted ranged from 20% to 280%, with the average being 113%.
- One respondent said that they negotiate their fees for all three usages, and one said they negotiate their three-month usage fees.

Do you charge less if the image is being used on a subsidiary page?

There were 31 responses to this question.

Yes: 71% (22)
No: 29% (9)

- Of the 19 respondents who went into further details, 16 specified a percentage discount that they apply. This discount ranged from 20% to 50%, with the average being 32%.
- Three respondents said their subsidiary page price varies (on who the client is, for example).

How do you calculate size for web usage?

There were 33 responses to this question.

By pixel dimensions: 24% (8)
By screen size: 76% (25)

Do you offer a separate fee for low-res files (500kb) for web advertising usage?

There were 34 responses to this question.

Yes: 18% (6)

No: 82% (28)

- Of the two respondents who answered 'yes' to this question and who indicated the price that they charge, these prices were 'a nominal fee' and £39 per image respectively.

What is your average fee for the following (non-exclusive) multi-usage package deals (one year, UK rights only)?

There were 14 responses to this question.

All media usages	£8,400
Above the line ¹⁰	£5,956
Below the line ¹¹	£3,957
Web usage ¹²	£808
All print media ¹³	£2,854

The figures quoted represent the average values of the responses received.

- Two respondents said they would negotiate in these instances, with one making the comment that, as far as they were concerned, such usages cannot be priced in any other way.
- One respondent said that, since the arrival of the 'big' agencies, they don't make these type of sales any more.
- The only other usage that was commented upon (and priced) was a £6,300 charge made for press advertisements, advertising posters and point of sale usage.

¹⁰ Above the line usage is generally taken to cover all forms of paid-for advertising through mass media. For example press advertisements, advertising posters, billboards, television advertising and website banners.

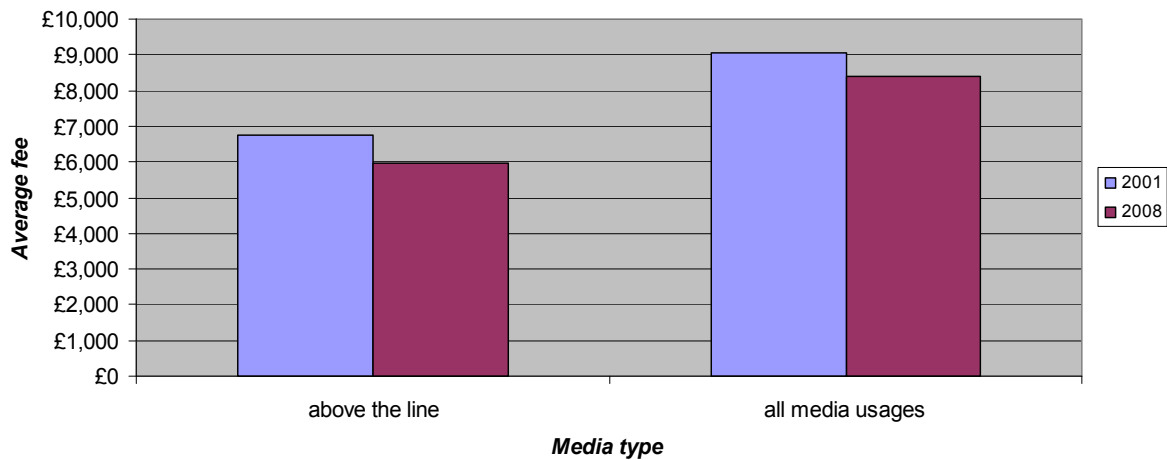
¹¹ Below the line usage is generally taken to cover all forms of non-media promotion directed towards a targeted audience. For example leaflets, brochures, mailers and other collateral, point of sale, trade fair displays and email marketing. Generally, electronic usages would automatically be included in both above and below the line deals. Both above and below the line terms are usually used in the context of a 'buyout' which allows unlimited usages in all relevant media for a specific time and territory (non-exclusively) unless otherwise requested.

¹² Web usage is generally taken to cover all website usages including website advertisements, corporate websites and promotional emails.

¹³ All print media is generally taken to cover all printed material and is distinguished from television and electronic. It includes press advertisements, collateral and posters.

As definitions of all the above terms can vary, it is important, when quoting for a package usage, that you list and define all the usages you are including.

**Average (non-exclusive) multi-usage package deal fee comparison,
2001 to 2008**



- Note: figures for 'web usage' and 'all print media' were not asked for in the 2001 survey, hence their omission from this graph.

What percentages do you add for European and World rights?

There were 17 responses to this question.

- Percentages quoted for European rights ranged from 20% to 50%, with an average of 37%. The most common percentage quoted, however, was 50% (which was the figure given by just over a third of respondents).
- Percentages quoted for World rights ranged from 50% to 100%, with an average of 72%. 41% of respondents said they add 50% when pricing such rights.

What items do you normally include within point of sale usage (e.g. wobblers, shelf cards etc)?

There were 10 responses to this question.

- The most common type of item mentioned was cards (e.g. tent cards, show cards, counter cards, shelf cards etc.), with six of the ten respondents referring to them.
- Three respondents said a blanket 'all' items.
- Two said in-store displays.
- Two said posters.
- Other items mentioned included electronic displays, leaflets, packaging, dump bins, wobblers/shelf-talkers, kiosks, table tents and headers.

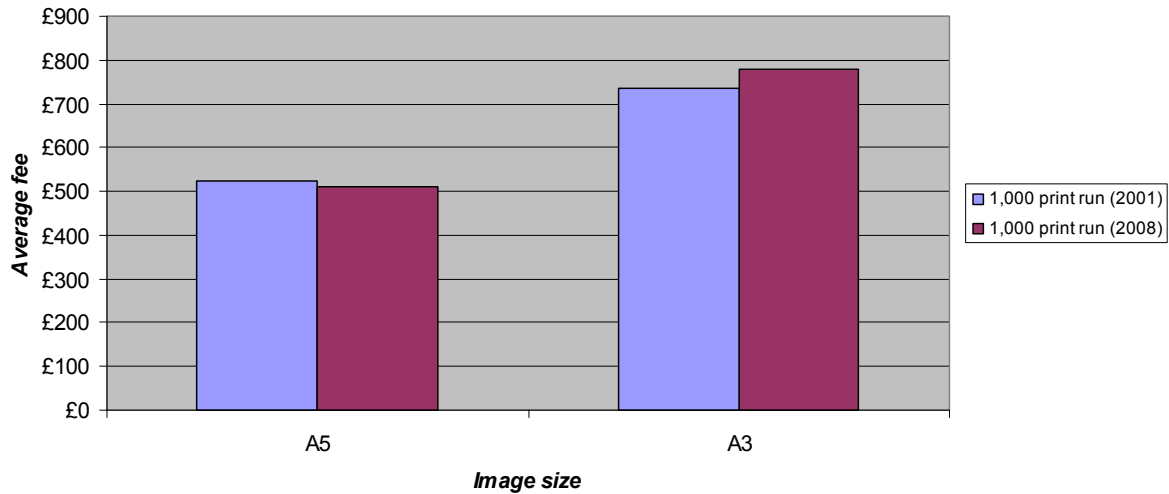
What do you charge for three-month UK licences for A3 and A5 point of sale sizes with print runs of 1,000 and 5,000?

There were 15 responses to this question.

	1,000 print run	5,000 print run
A5	£511	£772
A3	£780	£1,073

The figures quoted represent the average values of the responses received.

Average point of sale fee comparison, 2001 to 2008



- Note: figures for a 5,000 print run were not asked for in the 2001 survey, hence their omission from this graph.

How much do you charge for an image used on the front of product packaging (one year, UK, 10,000 copies)?

There were 14 responses to this question.

¼ of packaging	£326
½ of packaging	£407
Whole of packaging	£530

The figures quoted represent the average values of the responses received.

What percentage do you add for print runs of 50,000, 250,000 and one million?

There were 16 responses to this question.

- Percentages quoted for a 50,000 print run ranged from 0% to 100%, with the average being 39%. The most popular response was 25%, with almost a quarter of respondents naming it as the percentage they apply.
- Percentages quoted for a 250,000 print run ranged from 15% to 200%, with the average being 75%.
- Percentages quoted for a one-million print run ranged from 25% to 500%, with the average being 130%. The most common percentage quoted was 100% (given by 40% of respondents).
- One respondent said that they add 1p per copy to any print run of 300,000 or more when dealing with such requests.

Does the price you charge change if the image appears on the side or the back of any packaging?

There were 20 responses to this question.

Yes: 40% (8)
No: 60% (12)

- Of the seven respondents who answered 'yes' to this question and who provided further details, all said they would discount their normal fee if an image appears on the back of any packaging. Discounts ranged from 10% to 25%, with the average being 18%.
- Similarly, all seven would discount their normal fee for any images appearing on the side of any packaging. Here discounts ranged from 15% to 50%, with the average being 23%.

Do you calculate your prices according to the size of the image used in relation to the packaging, or the size of the packaging?

There were 20 responses to this question.

Size of the image used in relation to the packaging: 90% (18)

Size of the packaging: 10% (2)

Do you charge differently for the packaging of entertainment products such as CDs and DVDs?

There were 22 responses to this question.

Yes: 68% (15)

No: 32% (7)

- Of the respondents who answered 'yes' to this question and who provided further details, a third said they generally charge less when pricing packaging for such entertainment products, with discounts mentioned ranging from 30% to 50%. One respondent pointed out that, in the specialist market at least, this is mainly due to low print runs.
- A third also said that territory was a factor when pricing such usages.
- A quarter said they either charge the same rate as they do for book use, or use their book rate card as a starting point and go from there.
- A quarter also said that if the product in question is a budget CD, then that would have an affect on their pricing.
- A quarter mentioned that the prestige/importance of the product would be a factor.
- 17% said they would take the print run into account when pricing such usages.
- Other factors mentioned included the type of company in question, whether or not any major artists were involved with the product, the number of images used and whether the intended use was educational or non-commercial.

Which factors do you consider when calculating fees for outdoor advertising?

There were 18 responses to this question.

- The biggest factor when calculating fees for outdoor advertising is the size of the image/poster to be used, which was nominated by 72% of respondents.
- Another important factor is the length of time the advertisement is to appear for, as suggested by 61% of respondents.
- 39% said that the location of the advertisement would be taken into account when calculating their fee.
- 28% mentioned the territory.
- 22% said the advertising campaign would be a factor (e.g. its size, whether it is regional or local, the nature of the advertisements involved etc.).
- 11% said the type of client involved.
- Other factors mentioned included the budget of the client concerned; the subject, exclusivity and number of images involved; and the surface/medium the image is to appear on.

What price do you charge when licensing an image for use on a billboard (assuming the image is used at a full 48 sheet area)?

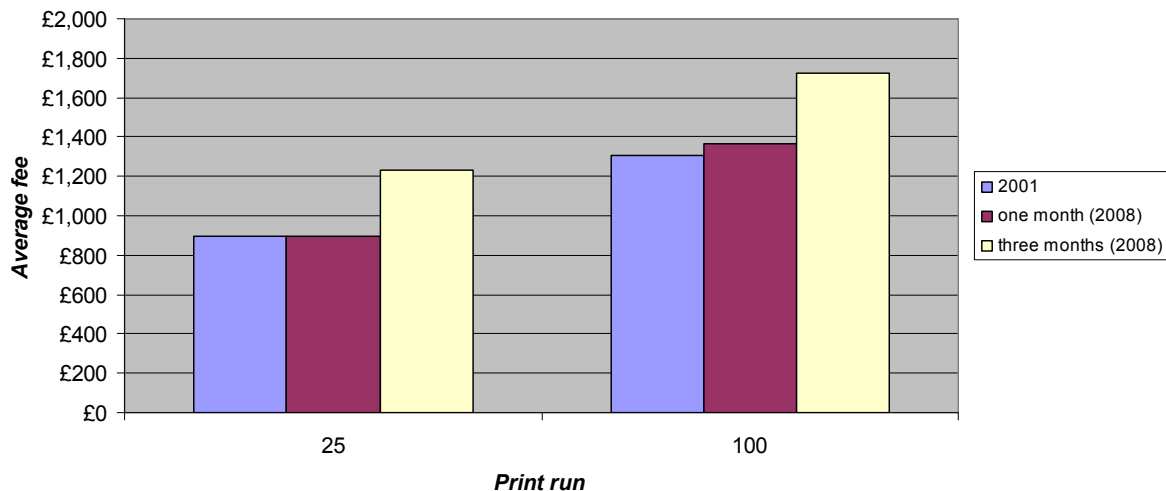
There were 17 responses to this question.

	1 month duration	3 months duration
25 print run	£893	£1,228
100 print run	£1,364	£1,724

The figures quoted represent the average values of the responses received.

- One respondent said they negotiate their fees for all these billboard usages.

Average billboard fee comparison, 2001 to 2008



- Note: the 2001 survey did not stipulate a time period when asking for billboard fees.

Does this pricing vary if the image is used as a small part of the billboard or in a montage?

There were 19 responses to this question.

Yes: 84% (16)

No: 16% (3)

- Of the respondents who answered 'yes' to this question and who supplied further details, 47% simply said they would charge less for such a usage.
- Of the five respondents who put a size to this discount, two said they'd charge 50% less, one said they'd charge 25% to 50% less (depending on the image's prominence), one said they'd charge the same if it was the sole image (but 60% less if it formed part of a montage), and one provided a sliding scale going from a 15% discount if the image forms $\frac{3}{4}$ of the billboard down to 65% if it forms $\frac{1}{16}$ or less of the billboard.
- Two respondents said any discount would depend on the visibility/prominence of the image in the overall display.
- One respondent said they negotiate their discounts in such instances.
- Other factors mentioned which would affect the fee included the layout and the market conditions at the time.

Do you have a different pricing structure for smaller outdoor advertising (such as transit advertisements, escalator posters etc.)?

There were 20 responses to this question.

Yes: 60% (12)

No: 40% (8)

- Of the respondents who answered 'yes' to this question and who provided further details, three said they charge between 15% and 50% less for such advertising.
- Three said the poster/image size would be a factor when deciding on any discount to apply.
- Three mentioned the territory.
- Two mentioned the print run.
- Two mentioned the length of time the advertisement is to appear for.
- Two mentioned either the type of client or the client's budget.
- One said they make use of a similar fee structure to normal-sized advertising (but just have a wider range of options at the lower end of the scale) and one said they apply poster sizes for such usages.

How much do you charge for a one year, 10,000 print run direct mail usage in the following instances?

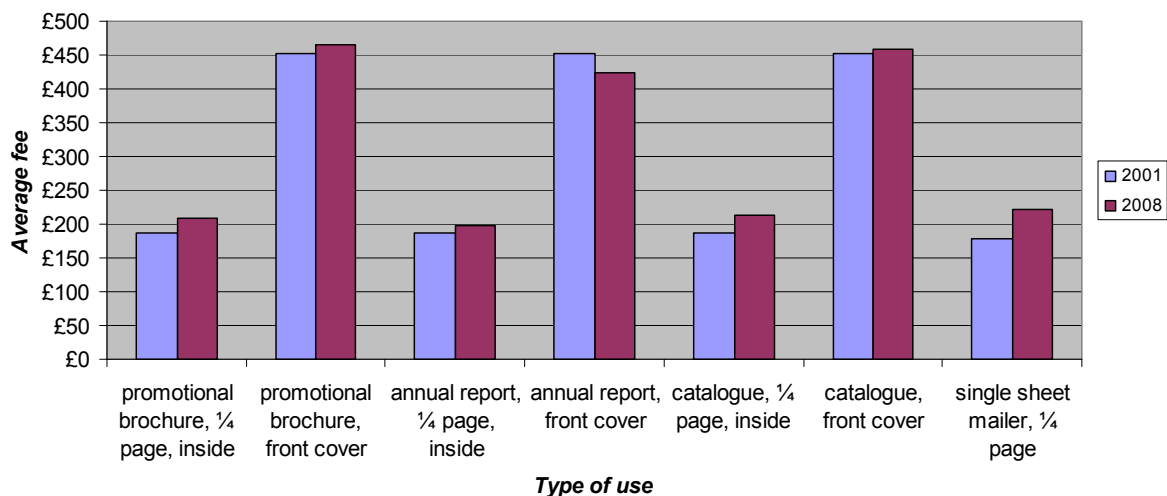
There were 27 responses to this question.

Promotional brochure, ¼ page, inside	£208
Promotional brochure, full page, front cover	£465
Annual report, ¼ page, inside	£198
Annual report, full page, front cover	£423
Catalogue, ¼ page, inside	£213
Catalogue, full page, front cover	£458
Single-sheet mailer, ¼ page	£222
Flier inserted into newspaper, ¼ page	£242

The figures quoted represent the average values of the responses received.

- One respondent indicated that they negotiate all these types of usage.

Average direct mail usage fee comparison, 2001 to 2008



- Note: the 2001 survey asked for a 'promotional brochure' fee in general, and so this is the figure used for the 'promotional brochure', 'annual report' and 'catalogue' comparisons. Likewise, the 2001 'A6' leaflet size fee has been used for comparison purposes with the 2008 ¼ page single sheet mailer fee. Finally, the 2001 survey did not ask for figures for 'fliers inserted into newspapers', hence their omission from this graph.

Do you charge an additional percentage for an online version (or pdf) of the same piece?

There were 25 responses to this question.

Yes: 72% (18)

No: 28% (7)

- Percentages quoted ranged from 10% to 50%, with the average being 33%. The most common percentage was 50%, with a quarter of respondents quoting it as the figure they use.
- A number of other respondents indicated that the figure they charge varies, depending on factors such as site traffic/exposure, the nature of the client concerned and market conditions.
- One respondent said they charge a flat fee for such usages.

What percentage would you add for a direct mail usage with a print run of 100,000?

There were 23 responses to this question.

- Percentages quoted ranged from 15% to 100%, with the average being 42%.
- One respondent said they apply flat fees in such instances (£280 for a ¼ page and £400 for a cover in a brochure, annual report or catalogue; £170 for a ¼ page and £240 for a cover in a document, standard report, leaflet or flyer), whilst another said their fees depend upon the client's budget.

How would you calculate a fee for an image used on a direct mail and then repeated on the envelope it is sent in?

There were 22 responses to this question.

- Extra percentages quoted ranged from 10% to 50%, with the average being 32%. The most common percentage applied is 50%, with just over a quarter quoting that as the figure they use. Two respondents said they make an unspecified nominal charge for such a usage.
- Three respondents said they apply their standard re-use discount rates.
- One said they charge the envelope at 150% of the inside rate, but then discount the inside use by 75%.
- One respondent said their fee would depend on the client's budget.

How much do you charge for a UK, one year, 100,000 print run travel brochure usage in the following instances?

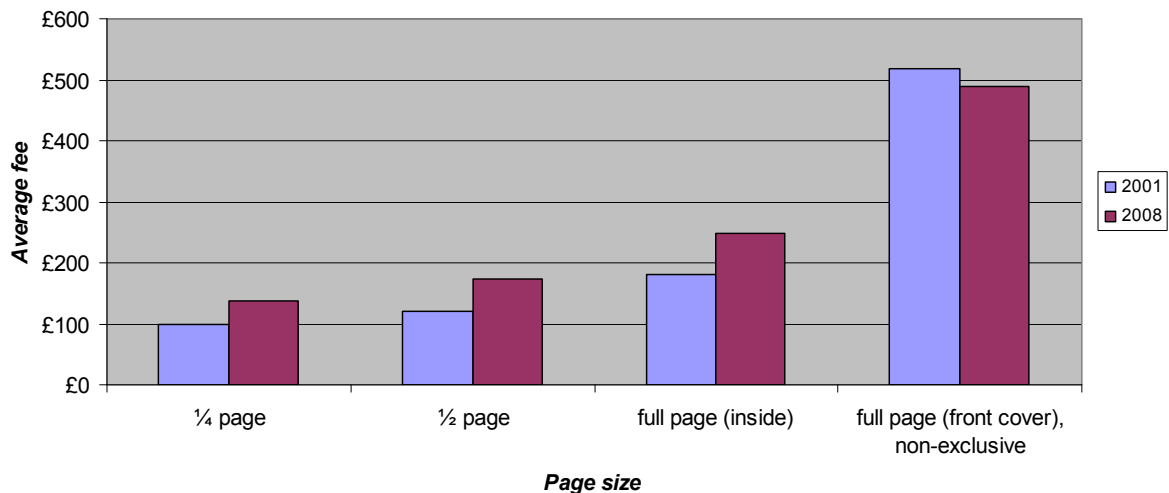
There were 20 responses to this question.

1/8 page	£123
1/4 page	£138
1/2 page	£173
Full page (inside)	£247
Front cover, non-exclusive	£488
Front cover, exclusive	£1,069

The figures quoted represent the average values of the responses received.

- Fees for 1/8 page ranged from £55 to £300.
- Fees for 1/4 page ranged from £60 to £345.
- Fees for 1/2 page ranged from £80 to £430.
- Fees for a full (inside) page ranged from £100 to £545.
- Fees for a non-exclusive front cover ranged from £210 to £1,000.
- Fees for an exclusive front cover ranged from £480 to £2,500.

Average travel brochure fee comparison, 2001 to 2008



- Note: the 2001 survey did not ask for figures for 1/8 page and full page (front cover) exclusive usage, hence their omission from this chart.

Do you charge an additional percentage for an online version (or pdf) of the same travel brochure?

There were 21 responses to this question.

Yes: 67% (14)
No: 33% (7)

- Of the respondents who do apply an additional percentage and who provided a figure, that figure ranged from 15% to 50%, with an average of 32%. Just under a third of respondents mentioned 50% as the figure they use.
- One respondent pointed out that the relationship they have with the client concerned is a determining factor as to whether or not an additional charge will be made in such instances.

Do you offer flat fee, subscription or volume deals for travel brochure usage?

There were 20 responses to this question.

Yes: 40% (8)

No: 60% (12)

“We often offer flat fee deals as long as there is a commitment to volume.”

- The greatest number of responses here were with regard to volume deals, with five Members saying that they offer deals in this area. As to how volume deals are handled, approaches varied from a sliding scale of discounts (from 10% for nine or fewer images up to 45% for 50 or more images), to negotiated fees.

What pricing structure do you use for stand-alone web usage on a travel/tour operator website (e.g. icon size, subsidiary page usage)?

There were 12 responses to this question.

- Four respondents to this question said they apply a flat fee for such usages, with fees ranging from £50 to £75 (invariably for one year's duration).
- Two respondents said they charge their normal web rates in such instances, whilst a third said they apply a discounted web rate. A fourth said they apply their standard book rates.
- One said such usages are negotiated, another said they provide such images on a subscription basis, whilst others said the fee was dependent on factors such as exposure and whether or not the website had limited access etc.

How much do you charge for a two week, national UK TV advertising campaign?

There were 9 responses to this question.

Broadcast	£472
Broadcast and mobile phone	£630
All media	£1,321

The figures quoted represent the average values of the responses received.

- One respondent indicated that their 'broadcast and mobile phone' and 'all media' prices were negotiated.

By what percentages do you adjust your prices in the following instances?

There were 9 responses to this question.

- **Regional:** all respondents indicated they would discount their prices when dealing with a regional advertisement. Discounts ranged from 5% to 33%, with the average being 20%
- **Charitable:** all respondents indicated they would discount their prices when dealing with a charitable advertisement. Discounts ranged from 10% to 50%, with the average being 27%.
- **European:** all respondents indicated they would add a surcharge when dealing with a European advertisement. Surcharges ranged from 20% to 50%, with the average being 34%.
- **World:** all respondents indicated they would add a surcharge when dealing with a World advertisement. Surcharges ranged from 50% to 150%, with the average being 88%.
- One respondent indicated they would negotiate their fees in all these instances.

What percentage do you add for the time durations of one and three months?

There were 10 responses to this question.

- **One month:** percentages quoted ranged from 10% to 50%, with the average being 24%.
- **Three months:** percentages quoted ranged from 25% to 75%, with the average being 43%.
- One respondent indicated they would negotiate their fees in both these instances.

Do you charge different rates for terrestrial and non-terrestrial TV advertising?

There were 10 responses to this question.

Yes: 30% (3)

No: 70% (7)

- Two respondents indicated that they charge slightly less for non-terrestrial advertising than they do for terrestrial advertising.
- Other factors which might affect the fee include the broadcaster concerned and the number of viewers likely to see the advertisement.

Do you license images for press release usage?

There were 25 responses to this question.

Yes: 64% (16)

No: 36% (9)

If yes, what is your average fee for the following types of press release?

There were 11 responses to this question.

National press release, 200 titles	£289
Regional press release, 20 titles	£137

Have you seen a shift in the licence types that your commercial clients are buying (e.g. Rights Managed, Royalty Free, Rights Ready, microstock)?

There were 20 responses to this question.

Yes: 50% (10)

No: 50% (10)

“RF has killed off a large percentage of RM.”

- Of the respondents who answered 'yes' to this question and who provided further details, 60% said they had noticed a shift towards Royalty Free images.
- 20% said they have seen a shift towards microstock.
- One respondent commented that they are now having to provide licences that meet the needs of their clients.

Have you seen a change in the usages/rights your commercial clients are buying (e.g. more online)?

There were 20 responses to this question.

Yes: 45% (9)
No: 55% (11)

“More online rights, more package deals.”

- Of the respondents who answered 'yes' to this question and who supplied further details, over half said they have noticed an increase in the purchasing of online rights (with particular reference being made to viral and email marketing).
- Other areas where increased usages/rights were noted included microstock images, package deals, DVDs, e-books, buyouts and supplementary usages.

If you offer exclusive rights, what percentage do you add for industry exclusivity?

There were 12 responses to this question.

- Percentages quoted ranged from 50% to 300%, with the average being 156%.
- Two respondents said the percentage they add varies (according to the type of image, for example).

If you offer exclusive rights, what percentage do you add for all media exclusivity?

There were 12 responses to this question.

- Percentages quoted ranged from 100% to 400%, with the average being 183%. The most popular figure was 100%, which was given by half the respondents.
- Three respondents said the percentage they add varies (according to the type of image, the photographer, previous sales history etc.), whilst a fourth simply wrote 'whatever we can get'.

Are your fees influenced by your client's budget, your price list or competitor pricing (please tick all that apply)?

There were 29 responses to this question.

Your client's budget: 93% (27)
Your price list: 76% (22)
Competitor pricing: 76% (22)

- Other factors mentioned included the volume of images ordered (either at the time or as a promise of future orders), whether or not the client is of a charitable or academic nature and the complexity of the job as a whole.
- One respondent indicated that they do (or are prepared to) negotiate to some extent on most prices.

Do you offer discounts for charities?

There were 29 responses to this question.

Yes: 42% (12)

No: 10% (3)

Sometimes: 48% (14)

Does your charitable discount vary if you are dealing directly with the charity or with the agency working on behalf of the charity?

There were 18 responses to this question.

Yes: 61% (11)

No: 33% (6)

Sometimes: 6% (1)

- Of the respondents who answered 'yes' to this question, two specifically stated that the discount would be greater if they dealt directly with the charity themselves, whilst a further two said that they only discount when dealing with charities directly.

Are there any new advertising usages/mediums you have difficulty pricing, or are there any new terminologies you have difficulties understanding?

There were 9 responses to this question.

- Four respondents specifically named Internet advertising as being a problem area for them.
- Two indicated that they're not happy when clients ask for 'in perpetuity' rights (the comment being made that this is an increasing tendency when dealing with Internet usage).
- A couple of respondents indicated that advertising as a whole is a problem area for them.
- Other problem areas mentioned included the large (and varied) number of licences available, email marketing and 'anything obscure'.

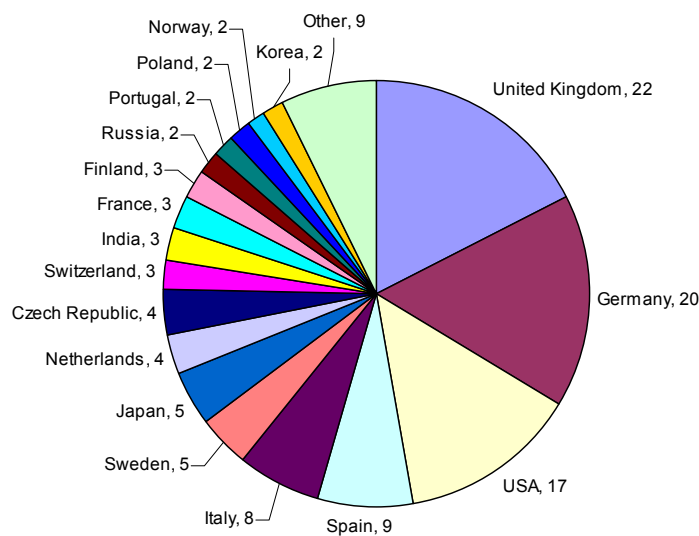
INTERNATIONAL PICTURE RIGHTS (sample size = 125)

This section looks at the responses to a wide range of rights- and rates-related questions from a sample of picture agencies throughout the world. The survey was aimed at recipients of the CEPIC mailing list and was conducted prior to the June 2008 CEPIC conference (at which event the preliminary results were presented).

In which country are you based?

There were 125 responses to this question.

The following chart graphically shows the spread of countries in which respondents to this survey are based.



- The section marked 'Other' consists of the nine countries that are represented by just one respondent and comprises the following nations: Brazil, Chile, China, Denmark, Israel, Mexico, New Zealand, Singapore and Turkey.

How have your reproduction fees changed over the last 12 months?

There were 112 responses to this question.

Increased: 10% (11)
Decreased: 47% (53)
Stayed the same: 43% (48)

If you have noticed an increase in reproduction fees, which sectors have been most affected and how?

There were 8 responses to this question.

- Seven respondents placed a figure on this increase, which ranged from 8% to 20% with the average being 12%.

- Three respondents said that the advertising sector is the one where these increases are most pronounced.
- Publishing, TV and films were also mentioned as sectors which have seen a price increase.

If you have noticed a decrease in reproduction fees, which sectors have been most affected and how?

There were 34 responses to this question.

- Thirty respondents placed a figure on this decrease, which ranged from 5% to 30% with the average being 16%.
- The most prominent sector that has been affected by this fall in prices is the editorial sector, with 29% of respondents mentioning it.
- 9% said book, magazine and newspaper publishing had suffered.
- 9% mentioned Rights Managed images in general.
- Other sectors mentioned included the advertising, creative and Royalty Free sectors.

What are the main factors which influence pricing trends in your territory (please tick all that apply)?

There were 111 responses to this question.

Clients' demands: 67% (74)

Local competition: 60% (66)

International competition: 52% (58)

- Of the 12 respondents who went into further detail, half referred to microstock as having an effect on pricing in their territory.
- 17% said that larger agencies are undercutting their prices.
- 17% said that competition in general was a factor (with reference being made to British libraries selling to the US market with low UK pricing).
- 17% mentioned Royalty Free pricing.
- Other factors mentioned included the sheer mass of images available online nowadays, the changing patterns of rights clearances and fluctuating currency rates.

What is the average reproduction fee per image in your country for single-territory rights for the following usages?

There were 79 responses to this question.

Book: inside use, ¼ page, up to 50,000 print run	£72
Book: full page, front cover, up to 50,000 print run	£219
National newspaper: 1/16 page	£67
National newspaper: ¼ page	£84
Magazine: inside use, ¼ page, 100,000 print run	£77
Magazine: front cover, main image, 100,000 print run	£262
Advertising: one year, all media buy out	£4,717
Advertising: one full page insertion in national press	£717
Brochure: inside use, ¼ page, 50,000 print run	£172
Brochure: front cover, 50,000 print run	£349
Website: ¼ screen, one year subsidiary page, commercial site	£154
Website: ¼ screen, one year subsidiary page, editorial site	£78

The figures quoted represent the average values of the responses received.

Do you have a minimum reproduction fee?

There were 48 responses to this question.

Yes: 52% (54)
No: 48% (49)

- Minimum reproduction fees quoted ranged from £4 to £108, with the average being £40.

Have you noticed any difference in pricing trends between Rights Managed, Royalty Free and microstock images?

There were 98 responses to this question.

Yes: 69% (68)
No: 31% (30)

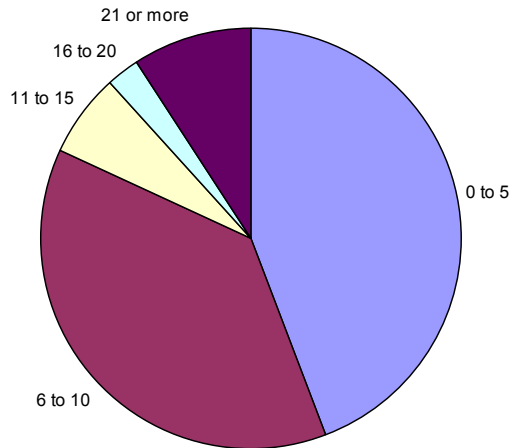
- Of the 13 respondents who commented on Rights Managed prices, eight said they are falling, two said they are rising and three said they are stable.
- Of the 15 respondents who commented on Royalty Free prices, nine said they are falling, five said they are rising and one said they are stable.
- Of the seven respondents who commented on microstock prices, six said they are gradually beginning to rise and one said they are stable.
- Three respondents noted that microstock and Royalty Free pricing structures have resulted in clients demanding a greater flexibility in pricing for Rights Managed images.
- Other respondents said that the bigger agencies are granting wide, extensive rights for lower fees which don't reflect usages.

“Microstock and subscription deals make it more difficult to ask for decent prices for RM and RF images.”

“The market is saturated. There are too many agencies and photographers seem to be placing their material with different agencies all working on the same market but selling at different prices. There is a lot of confusion.”

How many main competitors operate in your market?

There were 84 responses to this question.

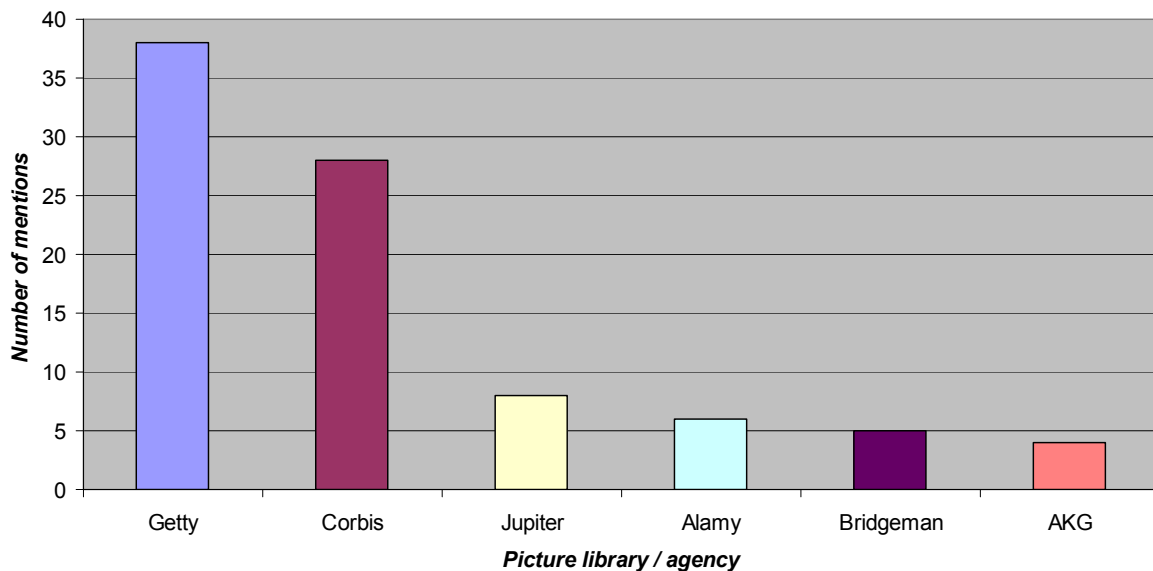


- Five respondents simply said there were 'many' main competitors operating in their market, whilst a couple said there were 'too many'.

Who are they?

There were 60 responses to this question.

The five main competitors mentioned are shown graphically below:



- Five specialist agencies mentioned other specialists as being direct competitors.
- Other competitors named by three or fewer respondents included AGE, Art Archive, Cover, Grazia Neri, Latin Stock, Mary Evans Picture Library, Masterfile, Mauritius, Photolibary and Scanpix.

Are there many companies selling into your country from overseas?

There were 98 responses to this question.

Yes: 61% (60)

No: 39% (38)

Do you do any direct business outside of your own country?

There were 100 responses to this question.

Yes: 82% (82)

No: 18% (18)

When selling to overseas markets, do you have your own pricing structure or do you rely on prices in that country to determine your fees?

There were 91 responses to this question.

Own pricing structure: 48% (44)

Rely on that country's prices: 52% (47)

For those trading in the Euro zone, has the introduction of the Euro had an impact on your prices?

There were 11 responses to this question.

- Three respondents said that prices have fallen as a consequence of the introduction of the Euro, whereas three said they have risen.
- Four respondents said that since the introduction of the Euro, the cost of living in Europe has risen and sales have fallen as a consequence.
- One US respondent said that as Euro prices are too high for overseas sales, they trade in US dollars when dealing with Europe.

How much do you charge (as a flat fee or a percentage) for a web version of a newspaper licensed in addition to a print version at the same time?

There were 71 responses to this question.

- 62% of respondents said that they added a percentage of the print fee when licensing a newspaper for web use if these licences are taken out at the same time as the printed version. Figures quoted ranged from 10% to 75%, with the average being 34% and the most common being 50%.
- 18% charge a flat fee for such a usage. Fees quoted ranged from £24 to £105, with the average being £40.
- 14% said they applied no extra charge (usually because such rights are included as part of any original print licences granted).
- Other respondents said their fees vary and are dependent upon factors such as the number of people expected to see the digital version of the newspaper, the size of any images used and the terms of any existing contracts etc.

How do you charge for subsidiary electronic rights bought by book publishers in addition to printed book rights (e.g. CD-ROM, DVD, e-books or subscription websites) and does this fee differ if bought at the same time or retrospectively?

There were 61 responses to this question.

- 56% of respondents said that they added a percentage of the print fee when licensing electronic versions of a book if these licences are taken out at the same time as the printed version. Figures quoted ranged from 15% to 80%, with the average being 37% and the most common being 50%.
- A third of respondents commented on such rights being bought at a later date, with 70% of these respondents saying that if bought later then a higher fee would be charged. Fees quoted ranged from 40% to 70% of the original print fee, with 50% being both the average and the most common. 20% said the fee would remain the same irrespective of when the licence was bought and 10% said they charged an unspecified flat fee for rights bought retrospectively.
- 18% of respondents said they made no extra charge when licensing books for electronic use (usually because such rights are included as part of any original print licences granted).
- 13% charge a flat fee for such usages. Fees quoted ranged from £24 to £120, with the average being £59.
- 13% said that their fees vary and are dependent upon factors such as the number of people expected to see the book in its electronic version, the size of any images used and the terms of any existing contracts etc.
- 5% said they negotiate such rights.

Do you have any further comments regarding significant pricing trends in your market over the last 12 months?

There were 24 responses to this question.

- Perhaps not surprisingly, almost half the respondents to this question made the comment that prices have steadily fallen over the last year (although a couple noted that prices have risen for some exclusive content, especially editorial), and that clients are increasingly asking for discounts on the images they order.
- A third of respondents commented on the detrimental effect that the larger agencies are having on the market as a whole. Particular reference was made to these agencies' pricing of images according to the quantity ordered as opposed to the quality of the individual images themselves, and also to their 'dumping discount' policies.
- 17% commented on the increase in competition in the marketplace. Reference was made here to the fact that clients are aware that suppliers are afraid of losing business and so are exploiting this fear by demanding lower prices. The comment was also made that some agencies are striking deals with publishing houses as a whole, as opposed to with individual book or magazine titles.
- 8% mentioned that they have noticed an increase in requests for preferred-supplier deals, even though the clients concerned don't want to commit to a minimum number of images.

“The market becomes wilder and wilder, the competition fiercer. The ubiquity of digital photography, the low price of microstock and low quality RF collections slowly but surely engenders the belief that all photography should cost the same, irrespective of image quality. Clients become increasingly price led to the detriment of our medium as a whole. Accountants rule.”

“We feel that the main reason for lower prices is the deals big agencies do with publishers where they offer really low prices for bulk use of images.”

- 8% referred to Royalty Free and microstock images as having a negative effect on their prices, with one respondent referring to the low subscription fees being offered by some Royalty Free suppliers.
- 8% said that tracking usages is now extremely difficult, with one respondent saying they were unhappy with the 'honour system' of usage notification, suggesting instead that publishers should be required to print reports detailing both usages and print runs.
- 8% referred to the Internet as a problem area, with one respondent commenting that controlling image use is now extremely difficult, whilst another said that electronic outputs have steered pricing towards a new type of rights structure.
- Some respondents commented that more negotiating takes place now than in the past (even though some clients clearly don't understand the mechanics of negotiation), while others referred to the saturation of the market as a whole (again as a consequence of the electronic age), the fact that some agencies are supplying their sub-agents within the same country with non-exclusive images (which is creating 'havoc' in the marketplace of those countries affected), that clients are increasingly citing lower budgets in an attempt to secure lower prices, and that some newspapers and magazines try to insist on using their own price lists.

“The agency's fear of losing business in a very competitive market has been exploited by clients who demand lower prices.”

CONCLUSION

There are a number of significant conclusions that stand out from the analysis of the data collected and compiled in this Pricing Trends Survey.

Firstly, there is a marked trend towards simplicity in pricing, with more flat fee arrangements and fewer complex, granular structures.

Secondly, the approach to secondary, and in particular subsidiary, electronic rights has shown a marked shift towards all-inclusive fee structures with reduced percentages.

Thirdly, in an extremely competitive market, with more choice and more varied picture sources than ever before, the survey reflects a clear perception that the balance of power in fee negotiation has shifted away from the picture seller in favour of the picture buyer.

Finally, there is a significantly increased diversity of approach to price negotiation, with more varied pricing models being used. There was a noticeable lack of confidence and some confusion amongst members regarding pricing for new media uses, which suggests that more technical information and dialogue with picture users regarding contexts of use may be helpful.

We trust that the survey will provoke questions and debate amongst BAPLA members and we welcome any specific or general feedback you may have.

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